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MFG219615 – Autodesk Vault Configuration Part 1

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Product Support Specialist– Synergis Engineering Design Solutions

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Class Description

Now that you have purchased one of the Vault products, you need to get the environment set up for you and your users. This class will look at what to do once the Vault Server has been installed. We will discuss topics such as creating users and groups, setting up permissions and security, establishing projects and working folders, and getting your CAD content into the Vault itself.

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Key Learning Objectives

- Learn how to create users and groups within Vault
- Learn how to establish user and folder permissions to protect your data
- Learn how to set up projects and establish working folders
- Learn how to move locally stored CAD data to the Vault

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About Me: Chris Benner

- CAD Supervisor @ Powell Fabrication & Manufacturing, LLC. St. Louis, MI USA
- 20 Plus years CAD experience, 10 years with Inventor
- Autodesk Expert Elite
- Dad, husband. Fan of American football, music, craft beer, good scotch and an occasional cigar, semi professional photographer.

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Lake & Field Photography

MICHIGAN

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Home:

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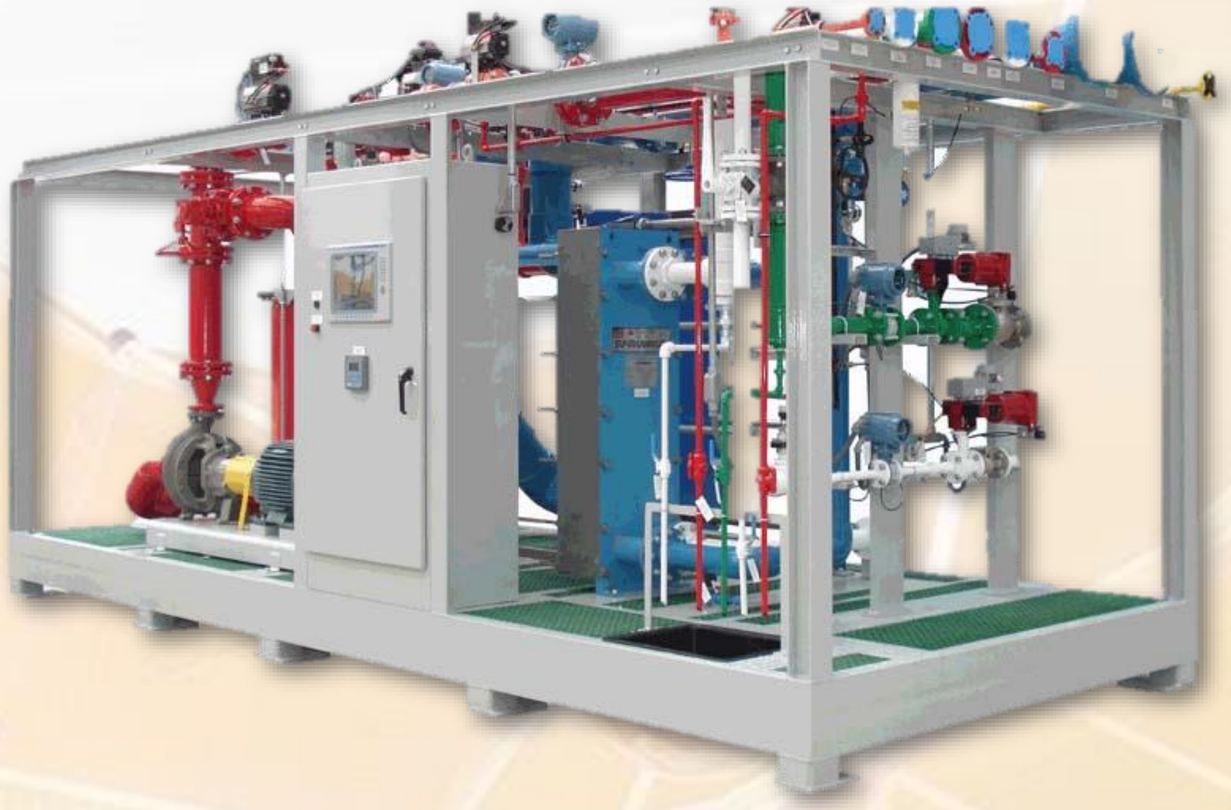
About Powell Fabrication & Manufacturing, LLC
www.powellfab.com



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About Me: Mark Lancaster

- Board drafting – Yes I'm old!!!
- 20+ yr MFG/CAD world
- 15+ yr 3D CAD
- CAD/Doc Mgmt Admin

- Autodesk Partner/Synergis EDS
  - Quakertown PA
  - MFG/Vault Products
  - Installation
  - Licensing/Subscription Support
- Autodesk
  - Expert Elite
  - Certified Inventor Professional
- I&L and Inventor Forum
- Lean MFG

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Congratulations!

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Now That I Have Vault,… What Do I Do With It?

- We Are Assuming It Has Been Installed
- Our Presentation Centers on Vault Professional
- We Will Start with Roles & Permissions, Users & Groups
- Time is Short for this material so, if time permits we will then:
  - Run Through the Config Options – Sooo Many Options
  - Talk About Adding Data to the Vault

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Vault Settings & Configuration

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Laying the foundation for your Vault

AKA: Roles, Users, Groups, and Permissions

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A poor (Vault) foundation may perhaps lead to this over time.

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Roles

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What are Roles?

- Assigned – Vault user or group of users
- Pre-defined
- Function ability
- Lowest form of security
- Useful → Vault Basic
- Mandatory/Entry point

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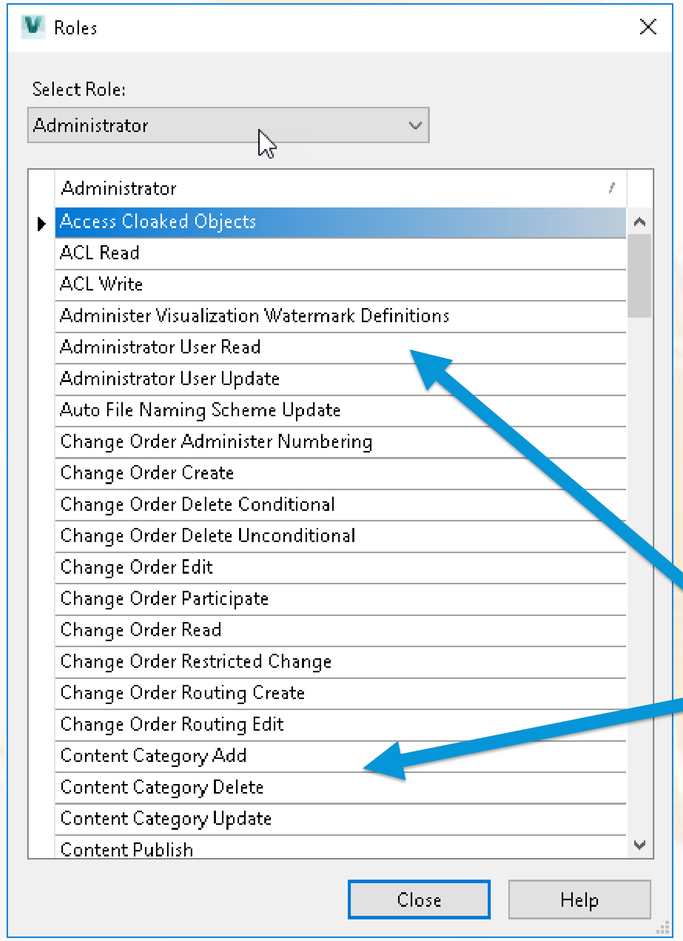
Pre-defined Roles



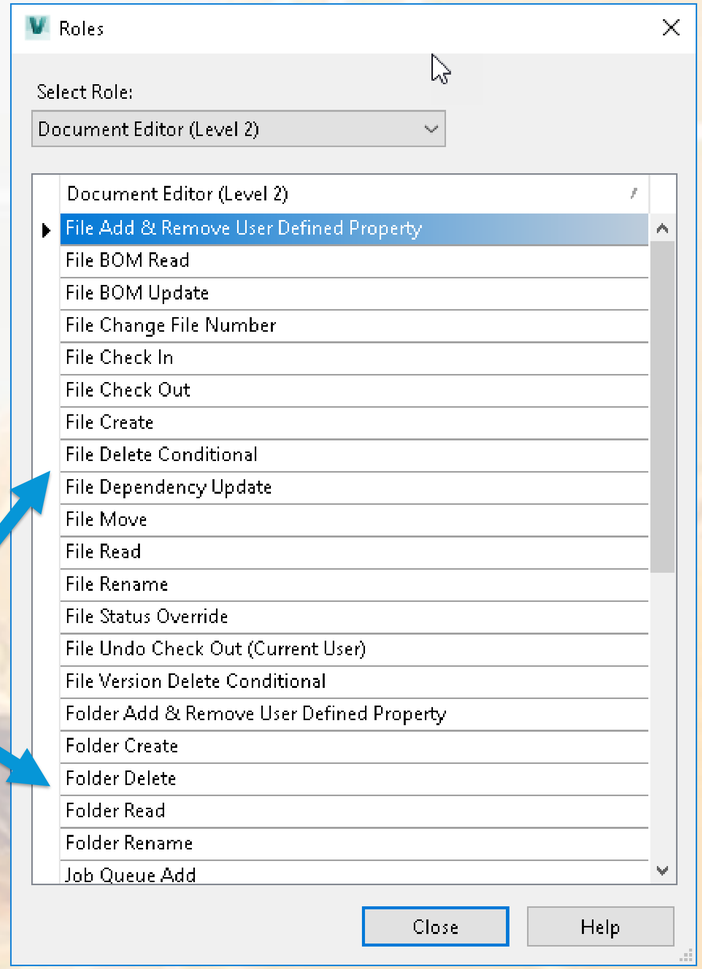
Vault Administrator

Pre-defined Role

Permitted Functions within Vault

Document Editor (level 2)

Pre-defined Role



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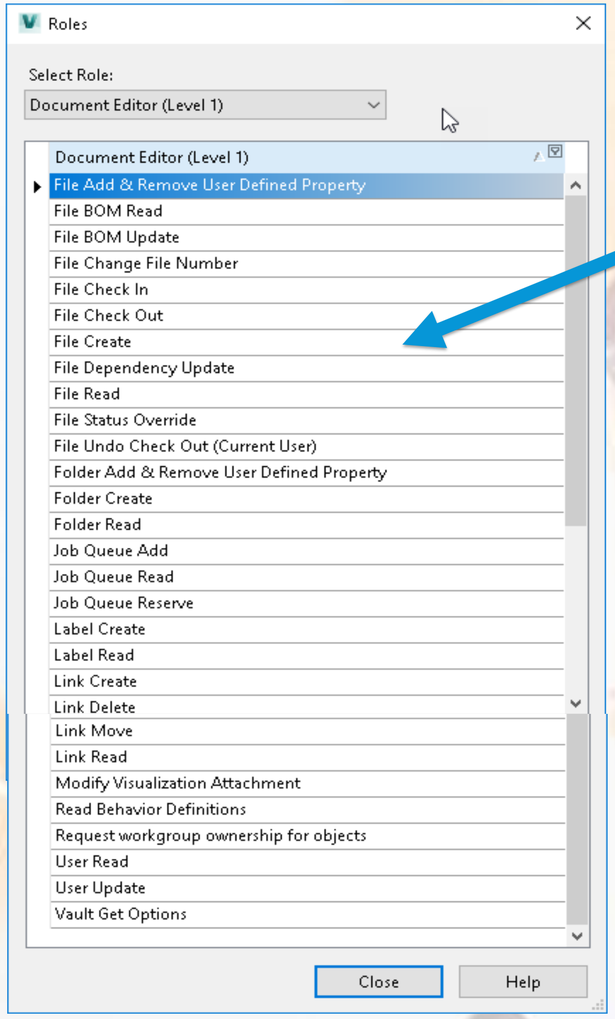
Overlapping Abilities



Document Editor (Level 1)

Defined functions

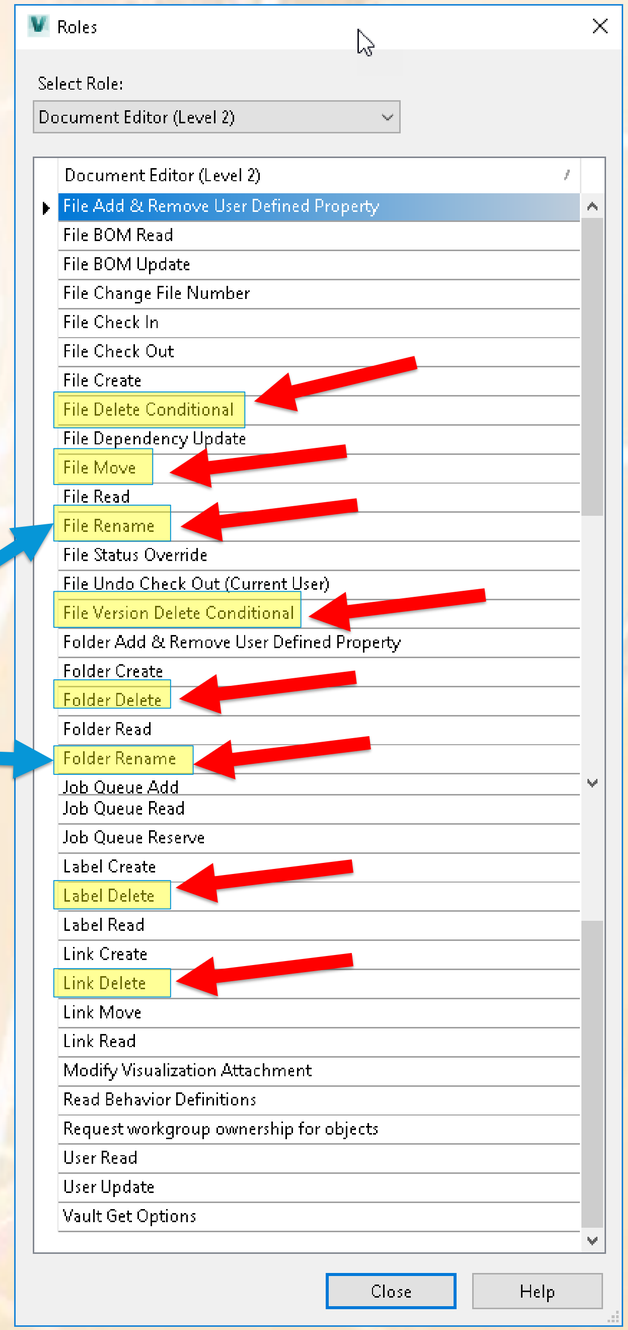
Document Editor (Level 2)

Level 1 + highlighted functions

User assigned both roles?

Lowest role is winner

Highlighted functions no longer permitted



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Additional Info

- Global vault setting
- Vault level
- Vault Pro 2018 – New vault admin roles
- Vault Pro 2019 – Custom role
- Spreadsheet

	A	B	C	D	E	F	G
1			Vault Roles				
2		Administrator	Cl	l 1	Change Order Editor Level 2	Configuration Administrator	Content Center Administrator	Content Ce
3	Vault User						
4	John Depp						
5	Tony Tiger						
6							
7							

Full privileges within to all folders all the time and administrative privileges on the

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Roles & Permissions

Vault Workgroup/Pro only

- Role Based Permissions
  - 1st level permissions
- ACL and State Permissions
  - 2nd/3rd level permissions
- Balancing point
- Why it's important!!!

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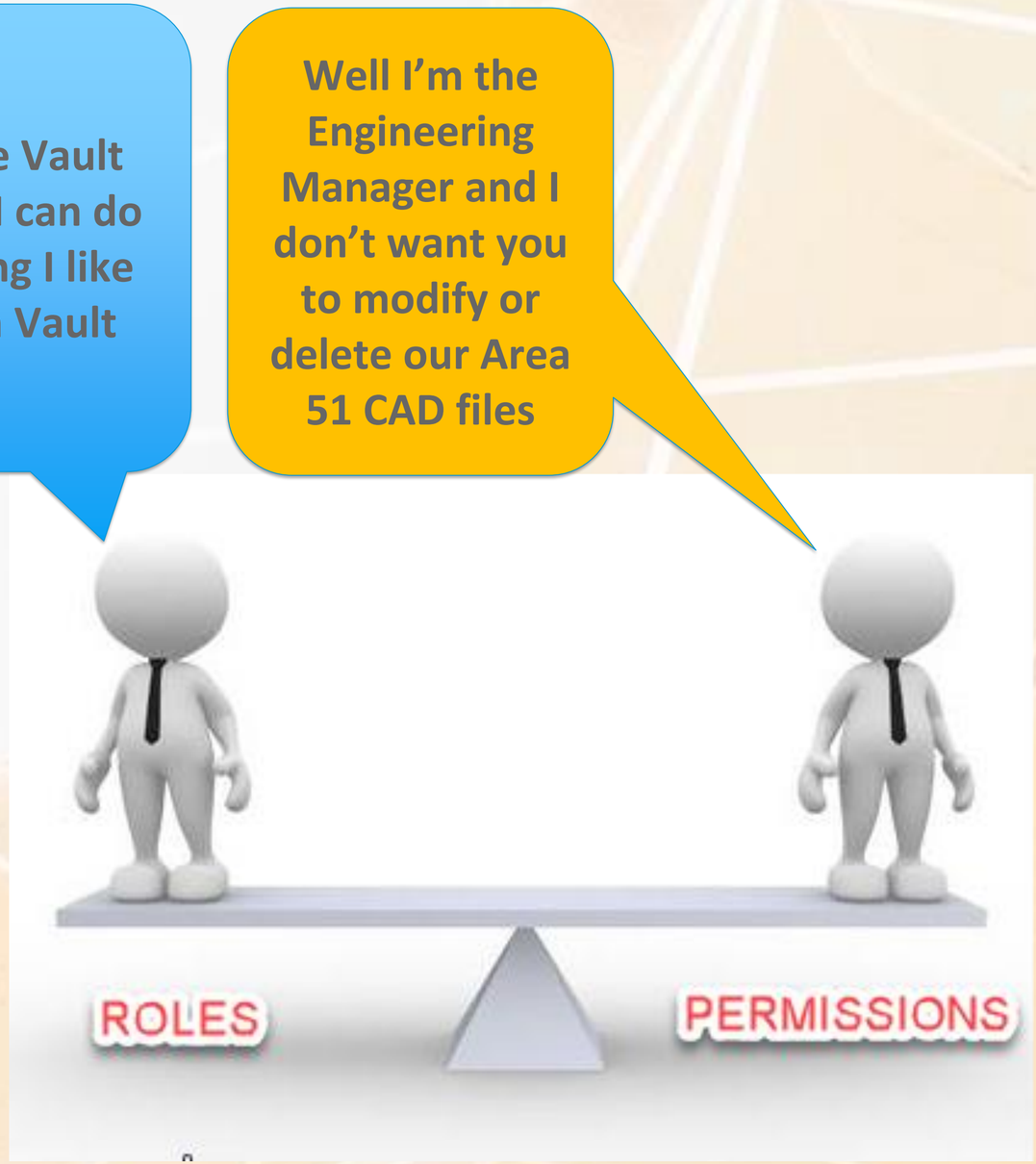
Roles & Permissions

Vault Workgroup/Pro only

- User/Administrator role
  - Access to all vault functions
- ACL Permissions applied
  - Per vaulted file
  - Deny modify/delete access



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Vault User Accounts/User Management

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Vault Users Accounts

- Entry point
- Static Vault Account
  - Vault Admin & Guest provided
- Active Directory Domain Account
  - Vault Pro Only
- Global Setting
- Special Accounts

As a group we're so happy & excited about our Vault and how it's configured

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Vault Administrator - Static

- Administrator → Account name
- Blank password → **Change it!!!**
- Disable?
- Designate 2 Vault Admins
- Separate user/admin account
- IT Group/Train
- **DON'T LOCK OUT ADMIN!!!**

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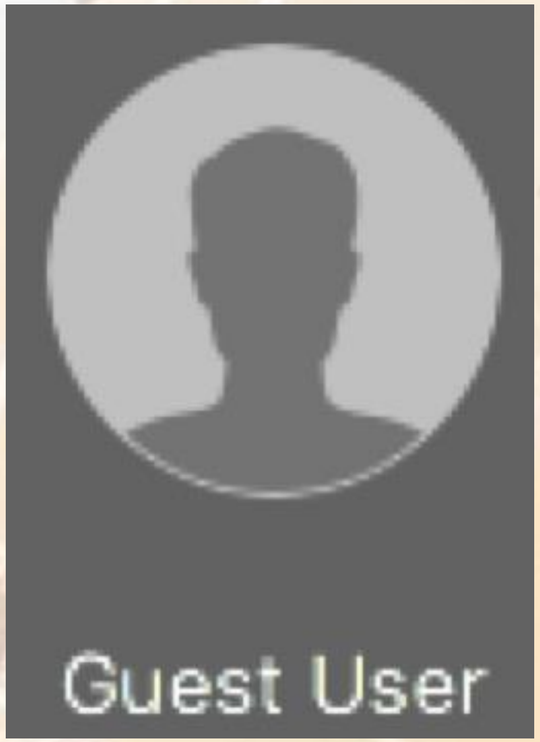
Guest - Static

- Guest → Account name
- Blank password
- Disabled
- Not a fan



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WARNING!!!

Before jumping in and creating any Vault Accounts and Groups make sure you have a plan in how this will be accomplished. Once a Vault Account or Group is created it is unable to be removed.

Modifying, disabling or promoting/demoting is only permitted

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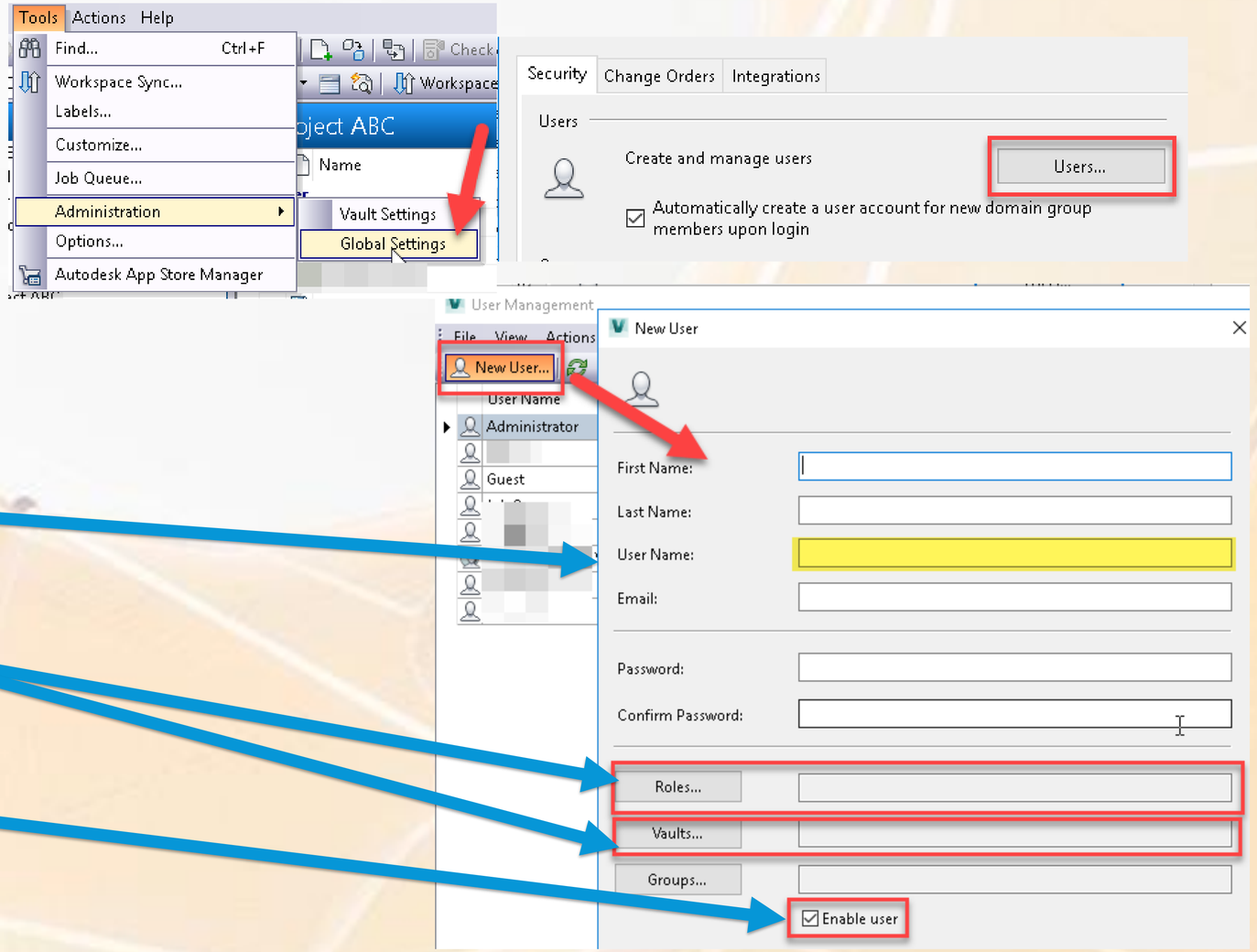
Static Account - Creation

- ADMS Console/Vault Client
- Vault Administrator
- Mandatory Field
- Need Role/Vault Access
- Enable/Disable
- Vault Admin/User managed



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Static Account - Creation

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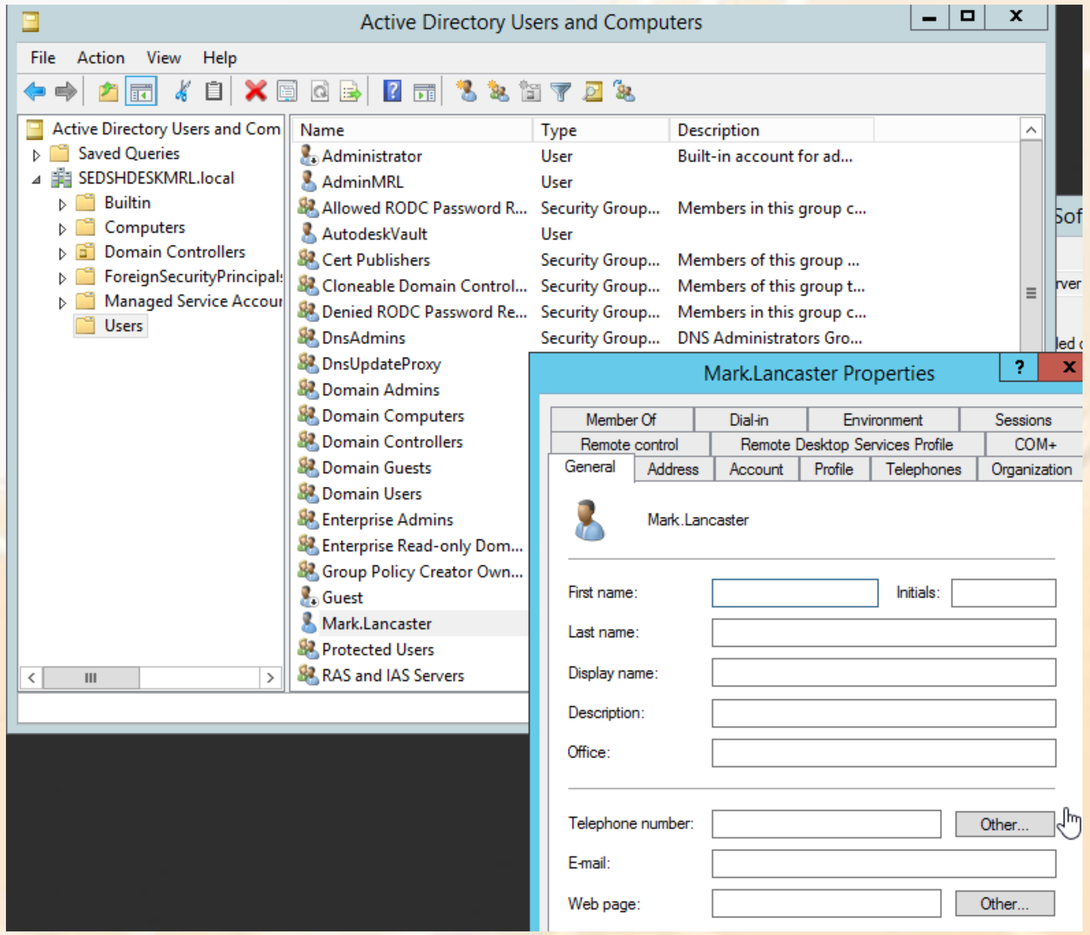
Active Directory Domain Account

Vault Professional Only

- Active Directory Account
- Credentials/Windows Log in
- Account Update
- Managed → Active Directory



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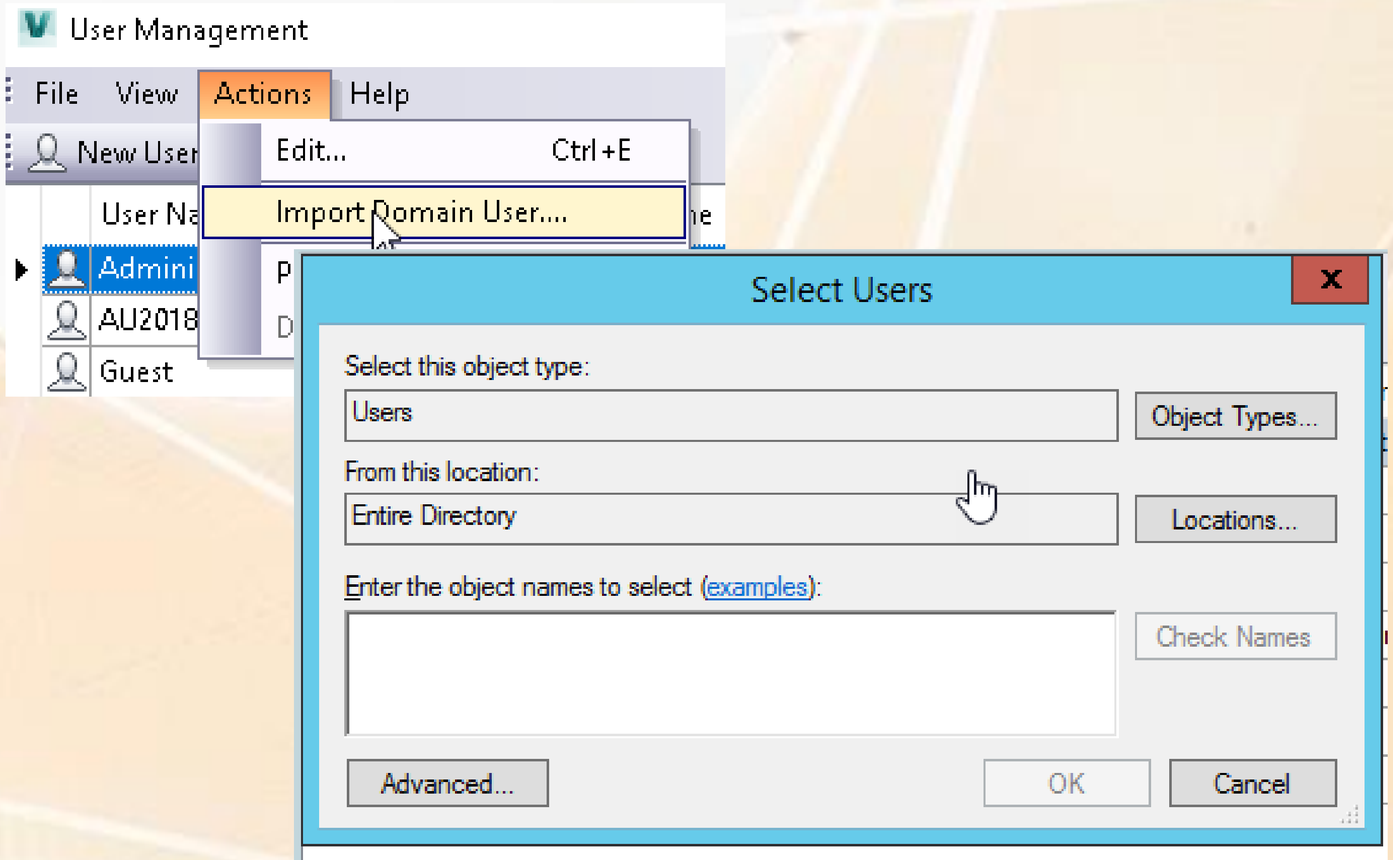
Active Directory Domain Account

Vault Professional Only

- Vault Admin/Imports
  - ADMS/Vault Client
  - Involve IT support
- Exist? Link?
- Define → Vault Administrator



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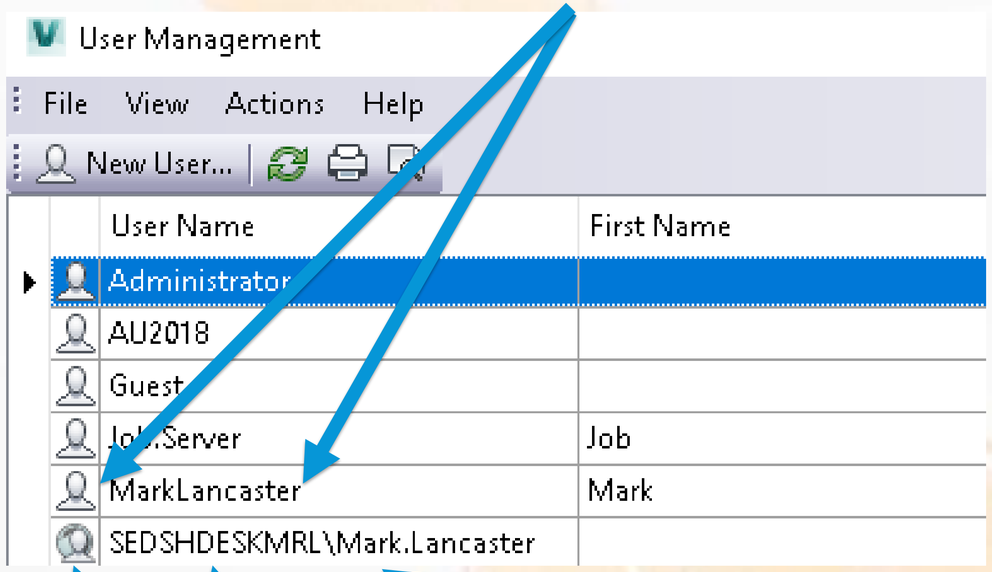
Static vs Active Directory Domain Account

Vault Professional Only

Static Vault Account



Domain Account Name

Domain Server Name

Active Directory Domain Account (imported)

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Vault Groups/Group Management

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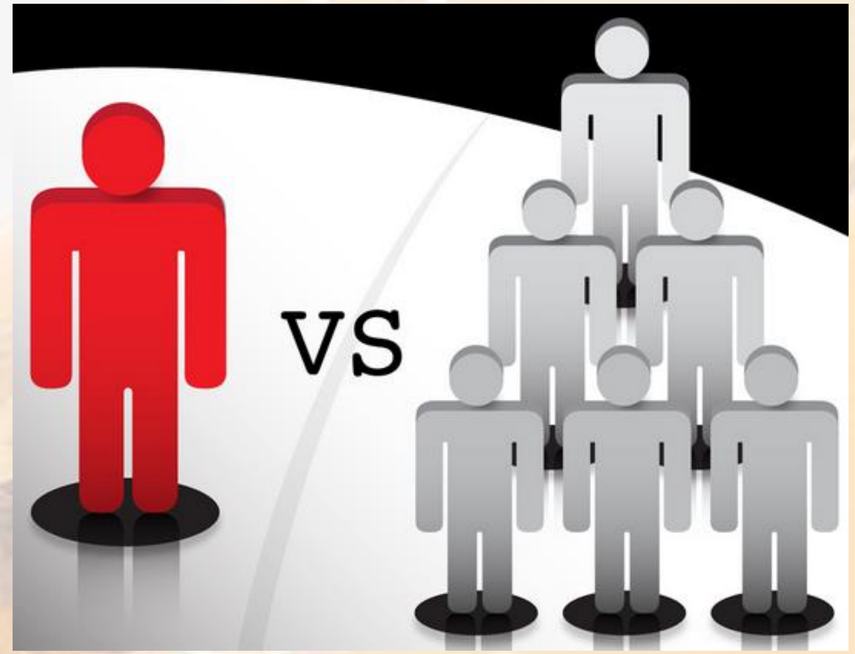
Vault Groups

- An Extension for Users
- Optional
- Useful/Same Configuration
- Static Group
- Active Directory Domain
  - Vault Pro Only
- Global Setting (YES/NO)



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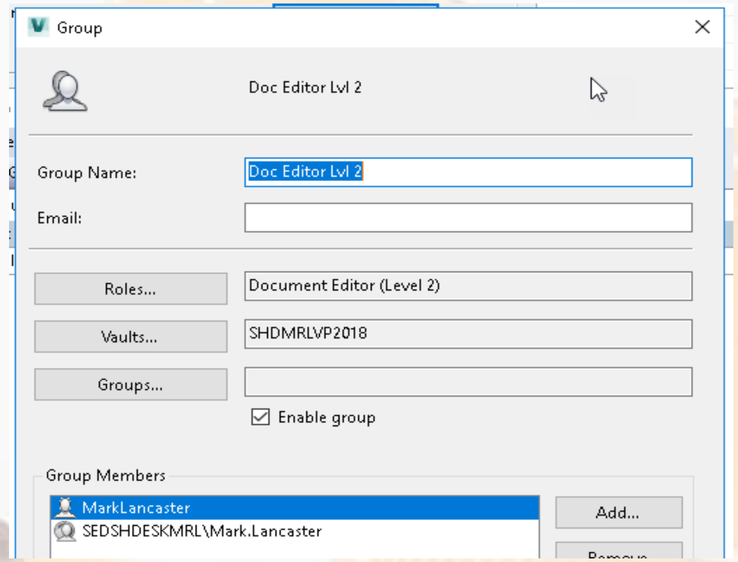
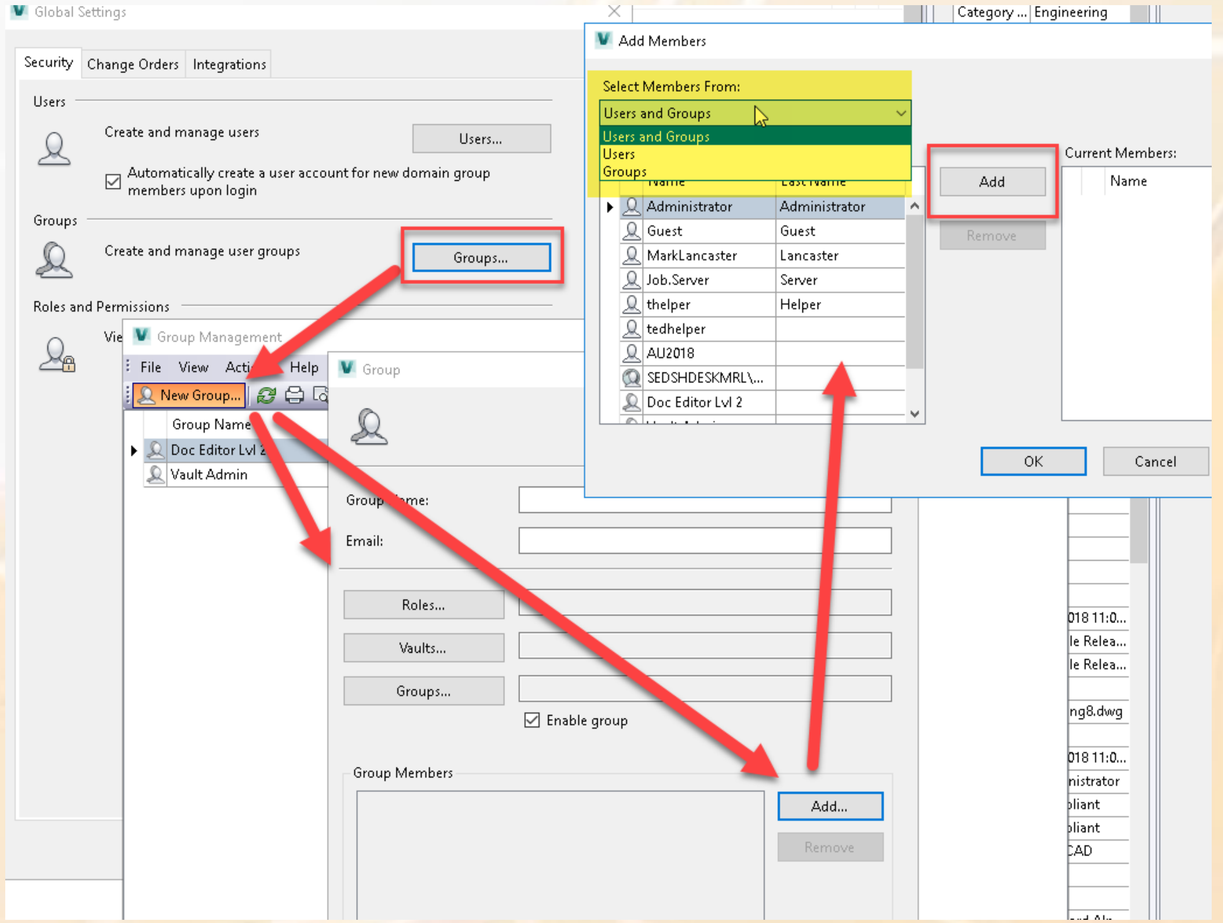
Vault Group - Creation

- ADMS Console/Vault Client
- Vault Administrator
- Group to Group assignment
- Vault Admin managed





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Vault Group - Creation

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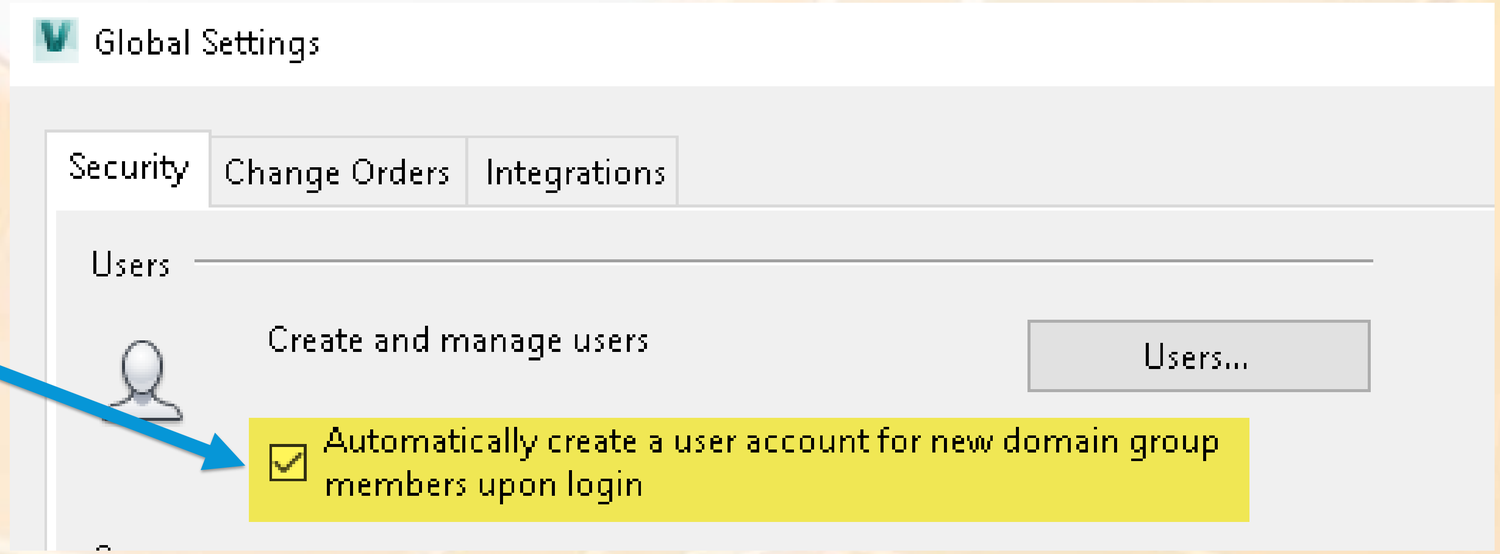
Active Directory Domain Group

- Active Directory Group – IT/Network/Permissions
- Import → Vault Admin
- Defined (in Vault) → Vault Admin
- Managed → IT/Network
- Exist? Link?
- Auto-Create Account
- Manual update
- Not a fan



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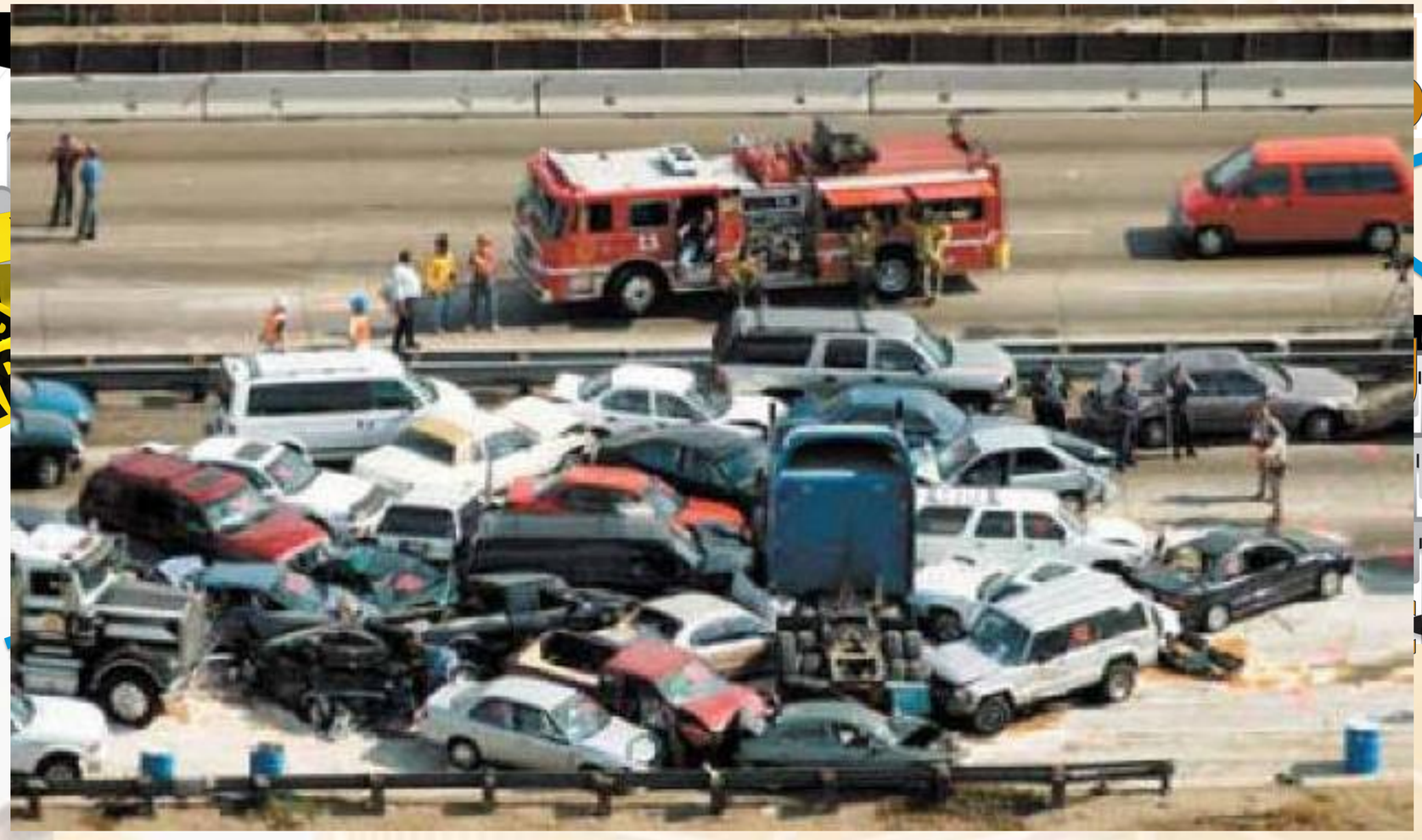
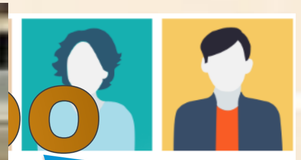
Mixing Roles, User's, Groups & Access

Group B

Roles

Group A





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Vault Permissions

(Vault Workgroup/Pro)

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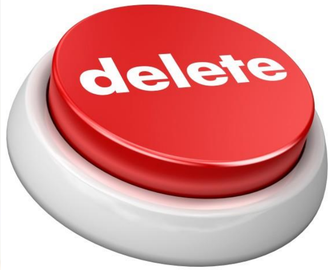
Permissions – Why its Important!!!

Vault User

Doc Editor
LVL 2

Conditional



Access to delete files across Vault

Conditional delete means there's no relationship exist at this time

VAULT BASIC ONLY

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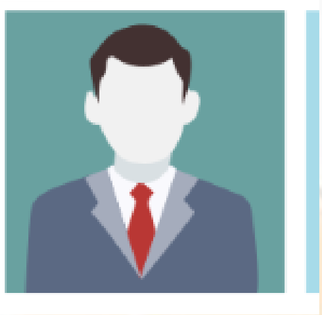
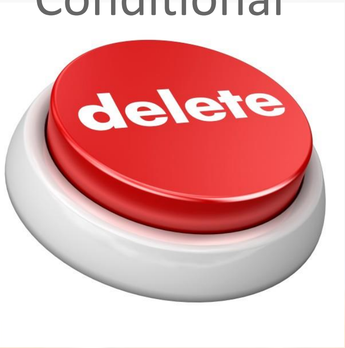
Permissions – Why its Important!!!

Vault User



Doc Editor
LVL 2

Conditional



Access to
delete files
across Vault

VAULT WORKGROUP/PRO

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Permissions – 3 Levels

Lifecycle State Permission

Highest Level of Permission

Access Control List (ACL) Permission

Object Based Security

Secondary Level of Permission

Role or Role Based Permission

Lowest Form of Permission

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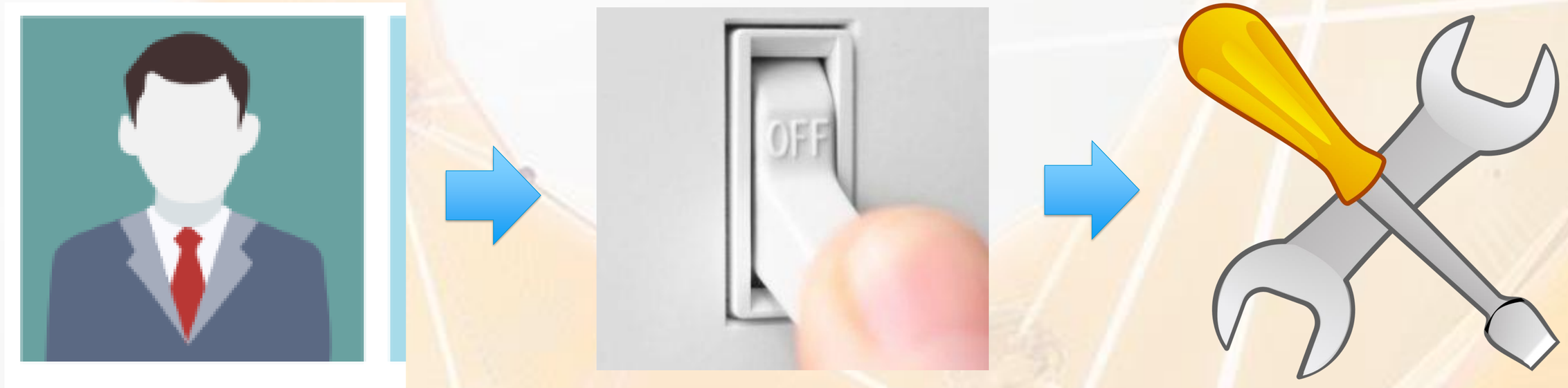
Permissions – Role Based



Provide access (light switch) to perform certain functions within Vault

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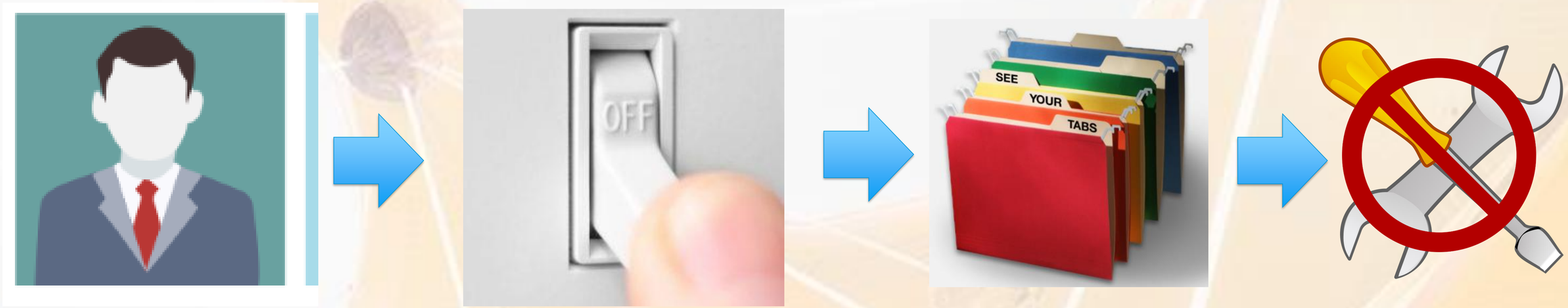
Permissions – ACL

VAULT WORKGROUP/PRO



Control access that's granted by the assigned vault role

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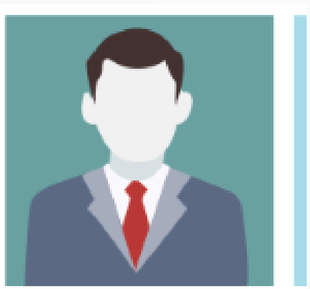
Permissions – Lifecycle State

VAULT WORKGROUP/PRO



WIP

In Review

Per Lifecycle State, Restrict access that's granted by the Role/ACL Permission

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Permissions – Access Control List

(Vault Workgroup/Pro)

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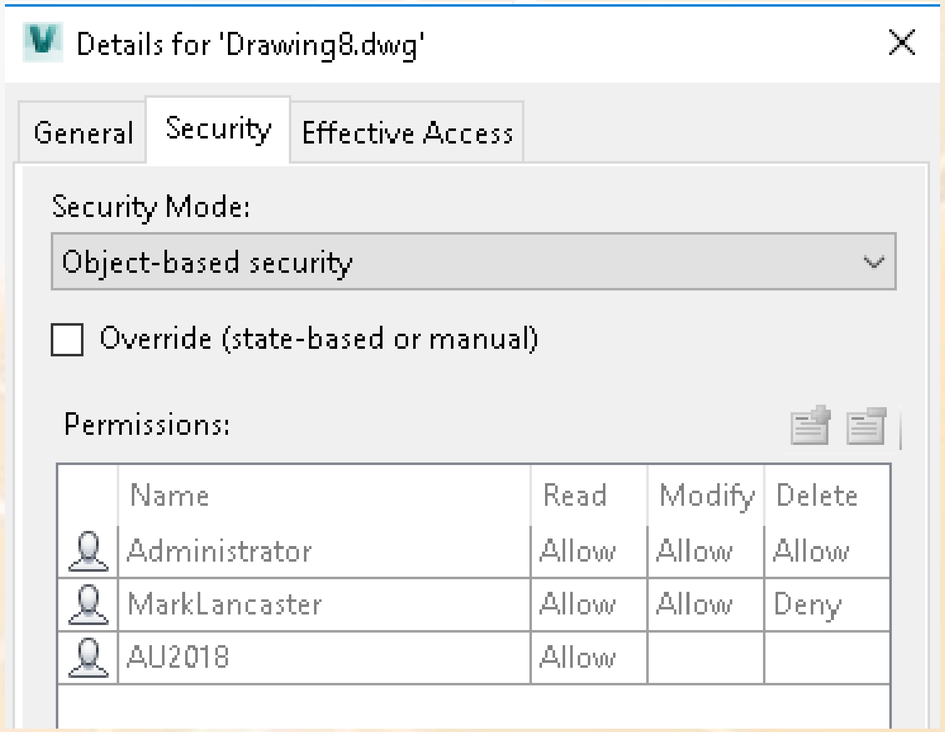
ACL Permissions

VAULT WORKGROUP/PRO

- Per Vault
- Vault Administrator
  - Security Administrator (2018)
- RMC Folder/File/Details/Security
- READ/MODIFY/DELETE
- Allow: Grant access
- Deny: Deny access
- Blank/None: Nether Grant/Deny



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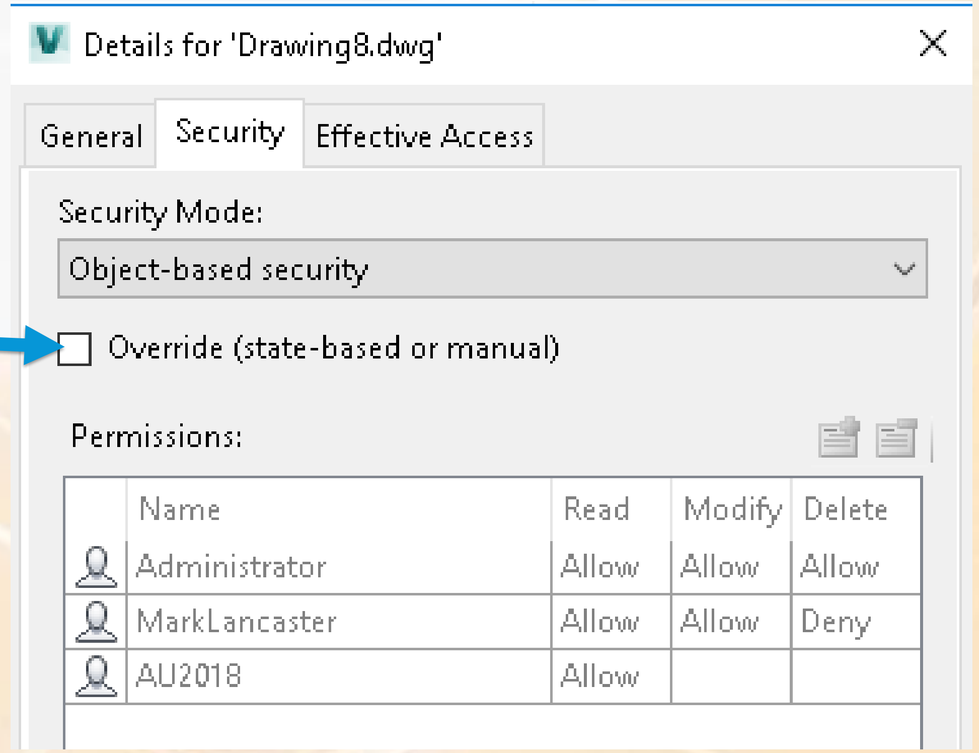
ACL Permissions

VAULT WORKGROUP/PRO

- Start @ Vault Root
- Propagate permissions
- Don’t forget Admin
  - Cloaking to resolve
- Override if needed
  - Lower structure
  - @ file level
- Don’t swing for the fences!!!
- Remove later on



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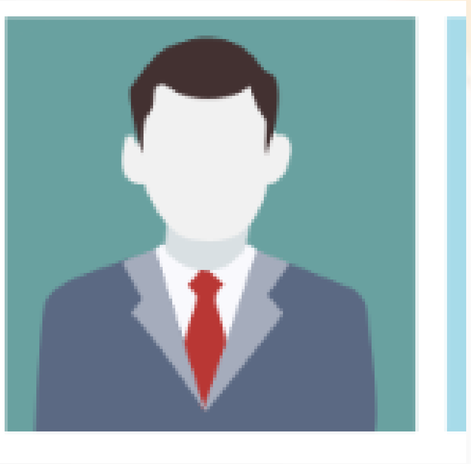
Lowest Permission Wins



User is assigned Doc Editor LVL 1

Role doesn't allow files to be deleted

ACL Permission granted to delete files

Role limitation still wins

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ACL Permission

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Vault Permissions

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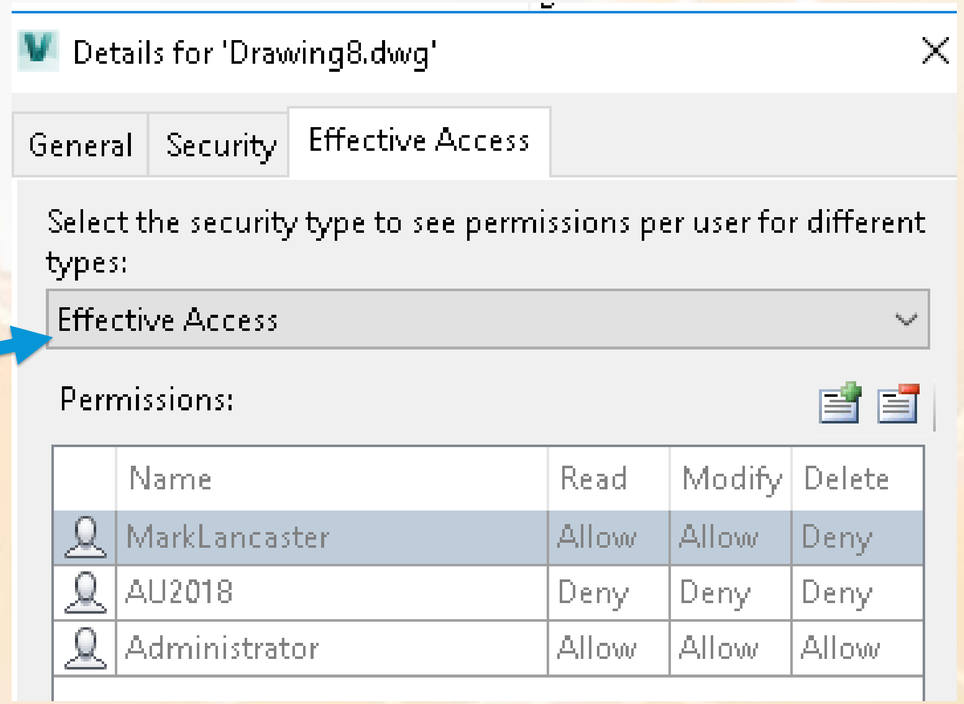
Permissions – Effective Access

VAULT WORKGROUP/PRO

- Vault 2016/2017 Release
- Folder or File Level
- What's really happening
- Obj Based, State, Effective
- One time check



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ACL Permission – Effective Access

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Permissions – Lifecycle State

(Vault Workgroup/Pro)

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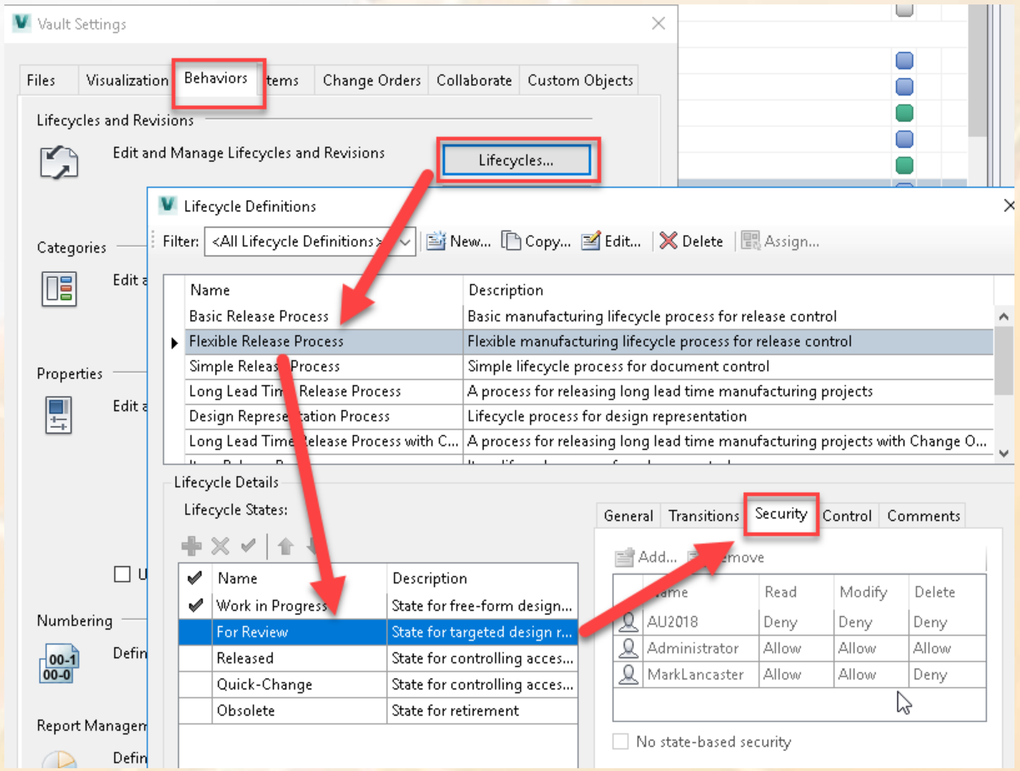
Lifecycle State Permissions

VAULT WORKGROUP/PRO

- Optional
- Vault Client
- Tools/Admn/Vault/Behaviors/Lifecycle
- Vault Administrator
  - Doc Manager LVL 2
- Why would you use it?



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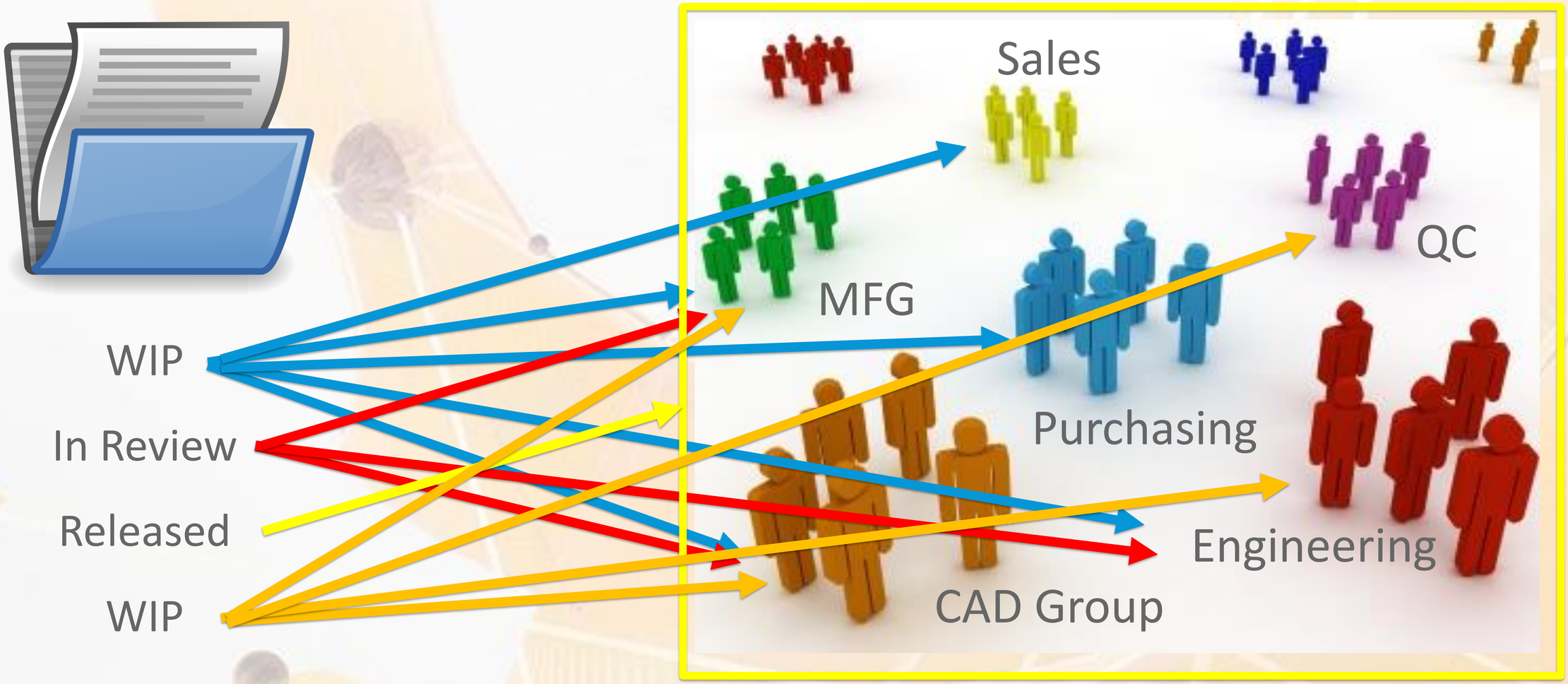
Lifecycle State Permissions – WHY?

VAULT WORKGROUP/PRO



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Vault Settings

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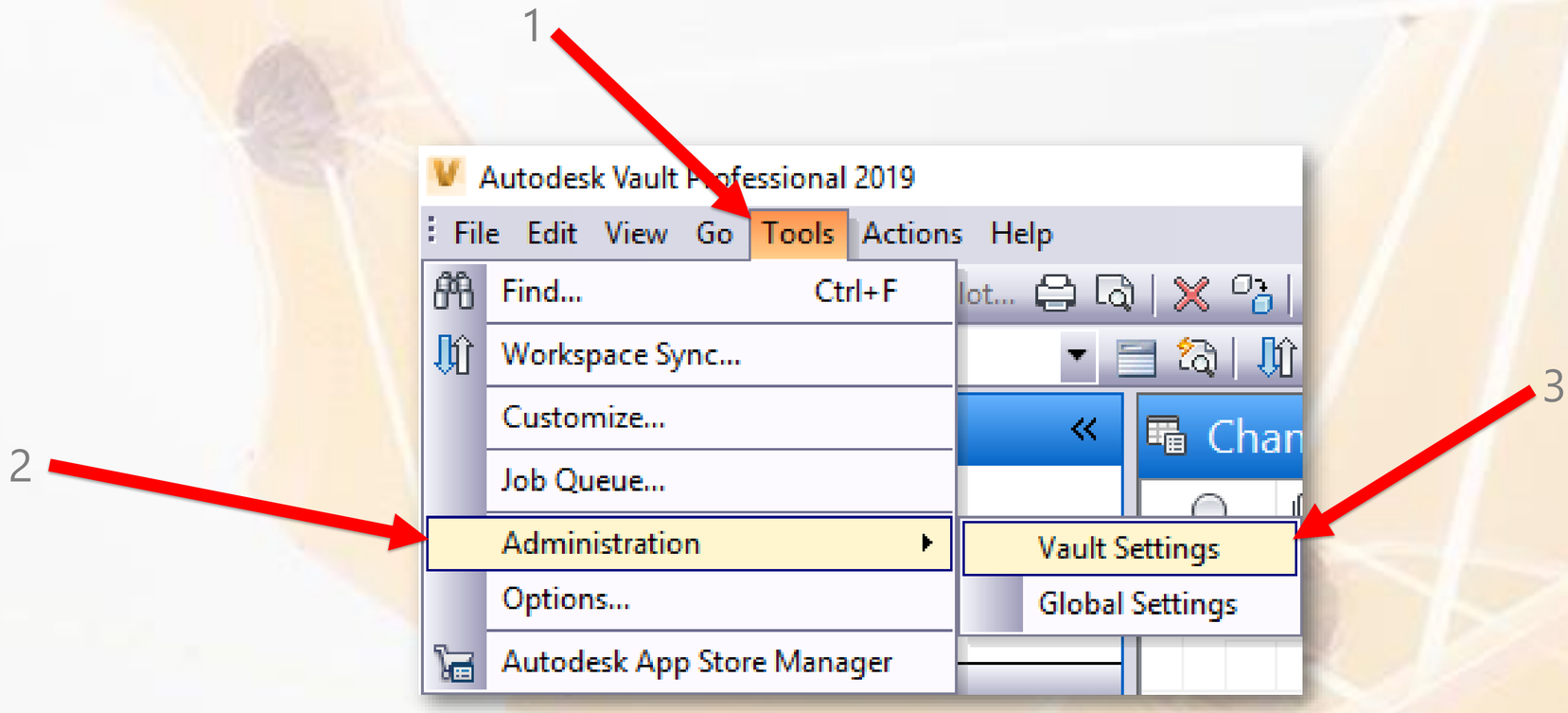
Memorize This…



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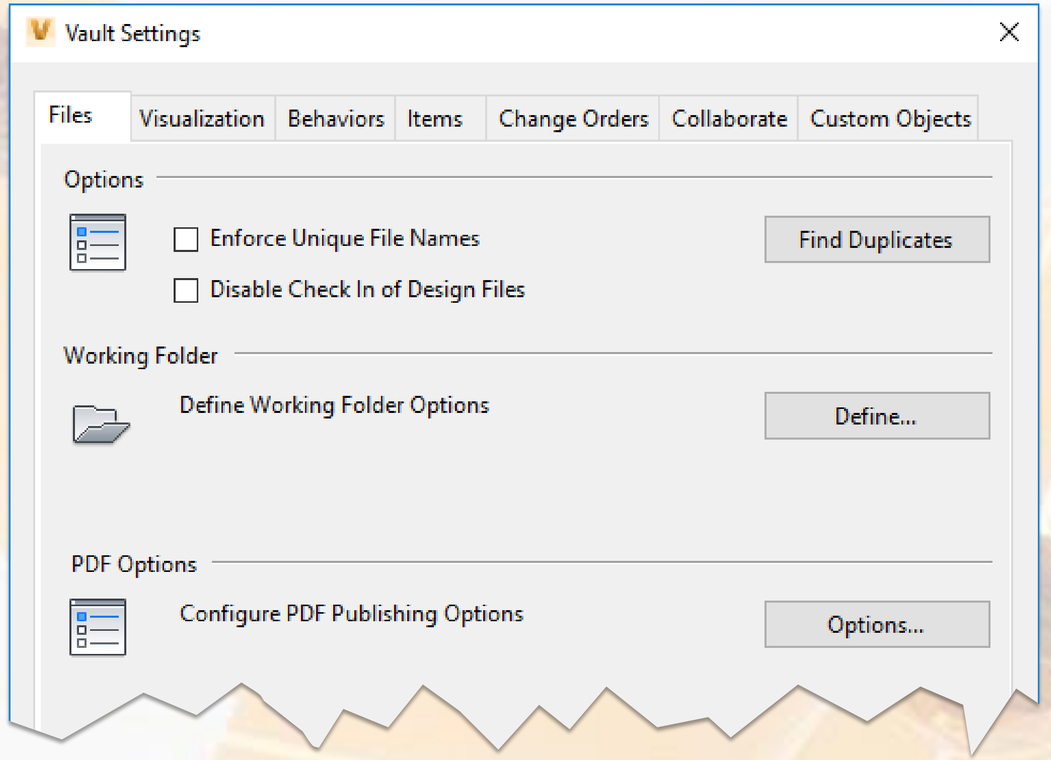
Vault Settings Main Dialog



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Vault Settings – Files Tab

Prevents files being added with a name that already exists in the database.

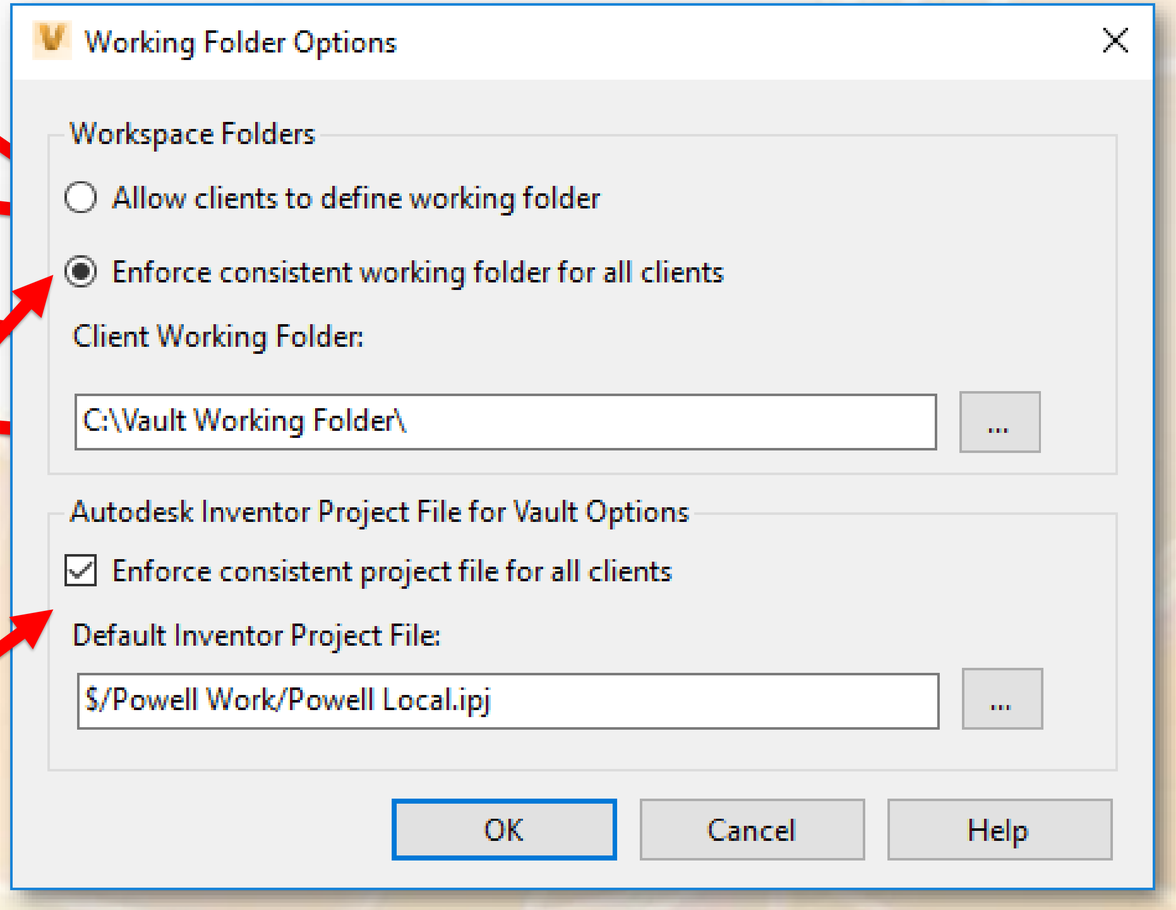
Use this first…

Vault Basic – This is where Properties Only allowed option. All the **covered with Visualizations.**. would be found

Working Folder Options

Decide whether to allow users to set working folder, or to enforce a common working folder; mapped in Vault to **Project Explorer ($)**

Enforce a single, consistent Inventor project for all users.



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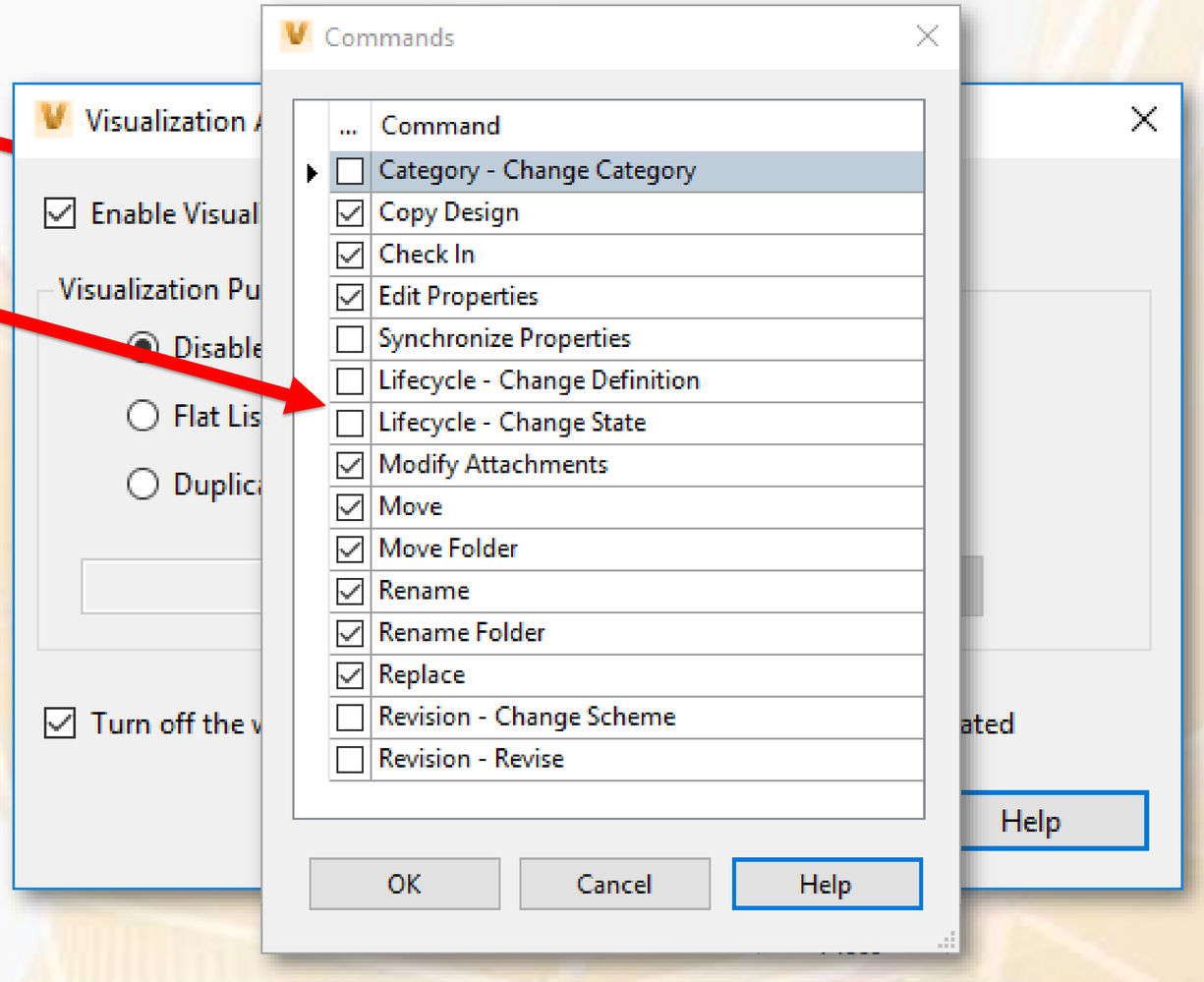
Vault Settings – Visualizations Tab

Start here to define options for Visualization Attachments.

Define Tasks that break the link to a Visualization..



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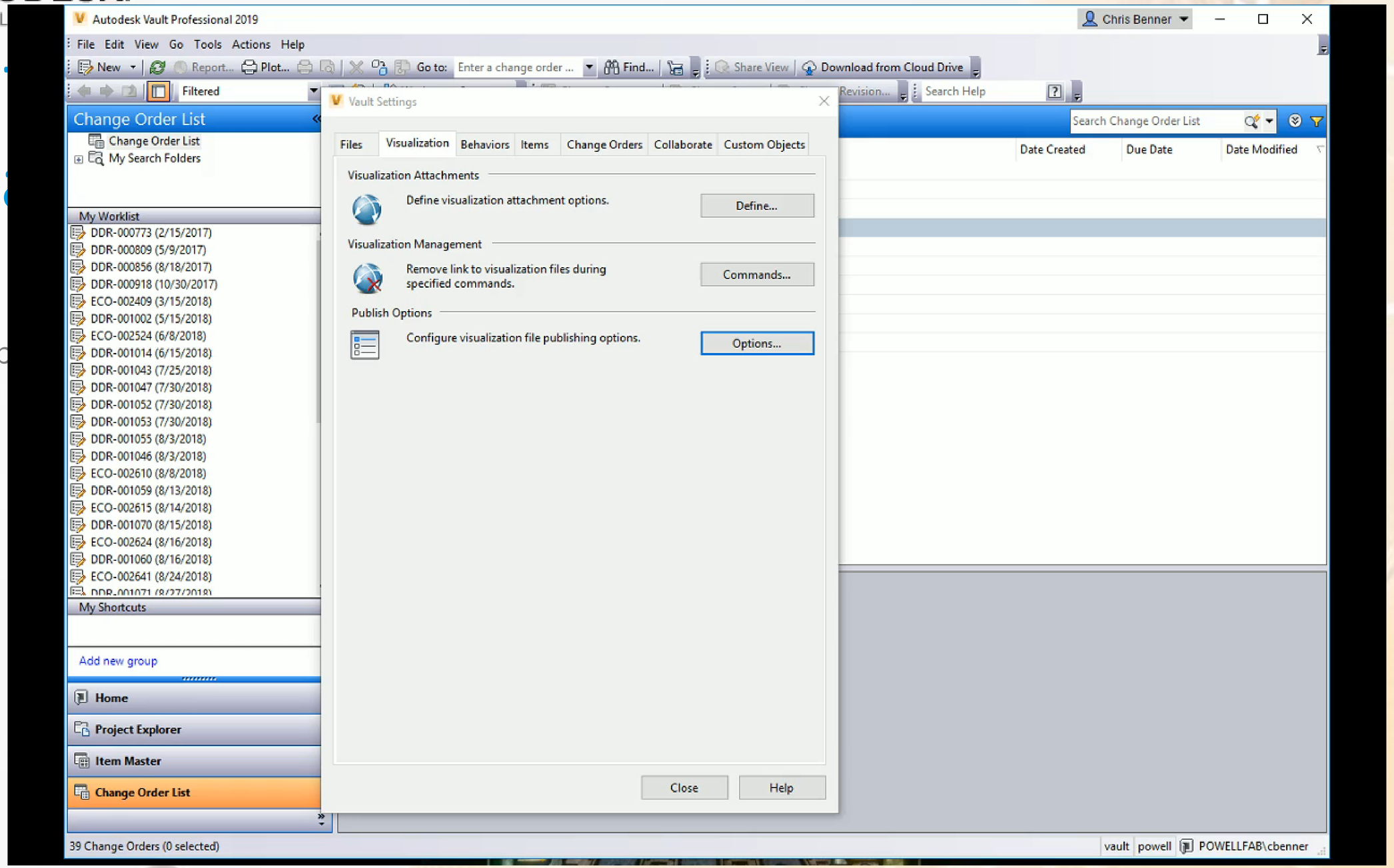

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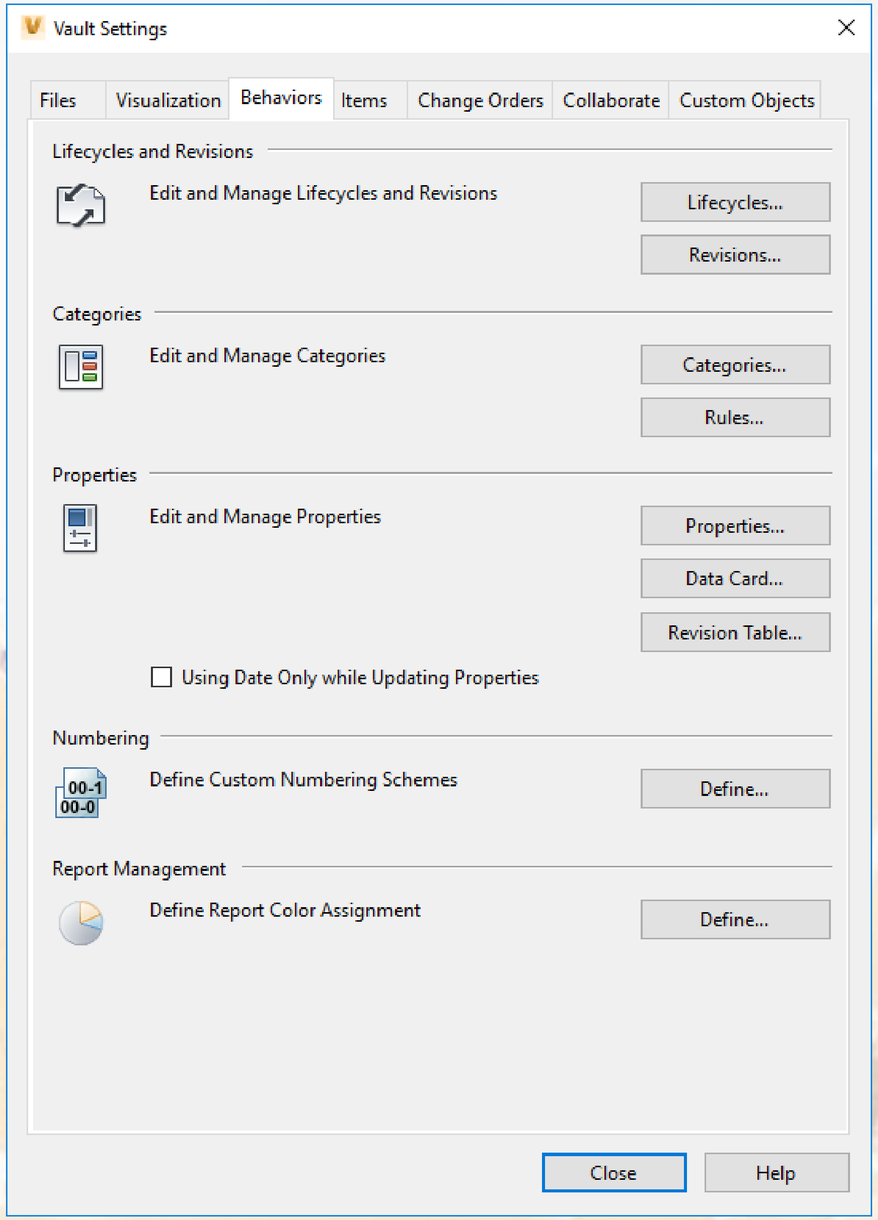
Vault Settings – Behaviors Tab

Now we're getting to the good stuff....



Let's break this one down....

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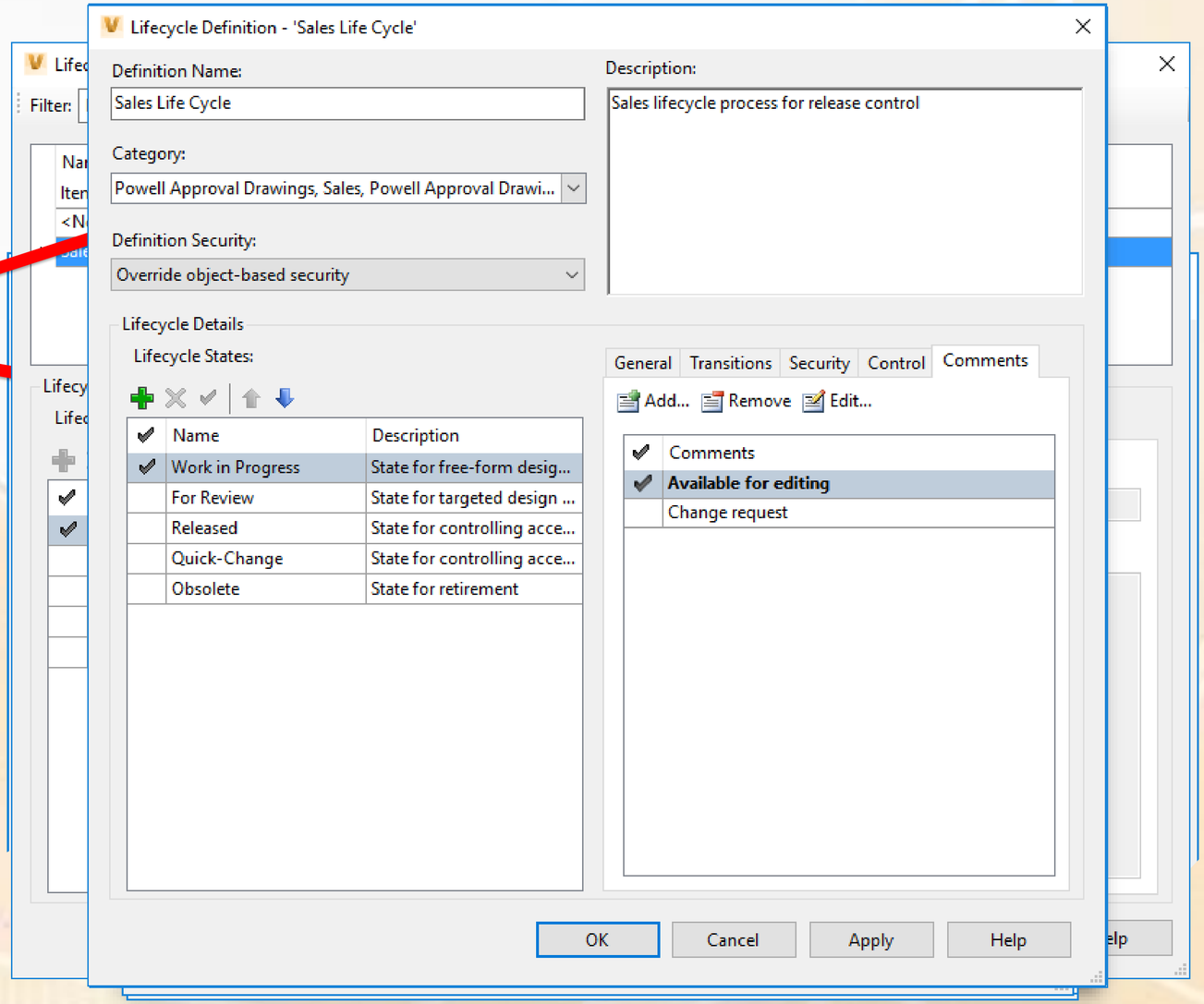
Vault Settings – Lifecycles

Lifecycle Definitions..

Lifecycle Edit.



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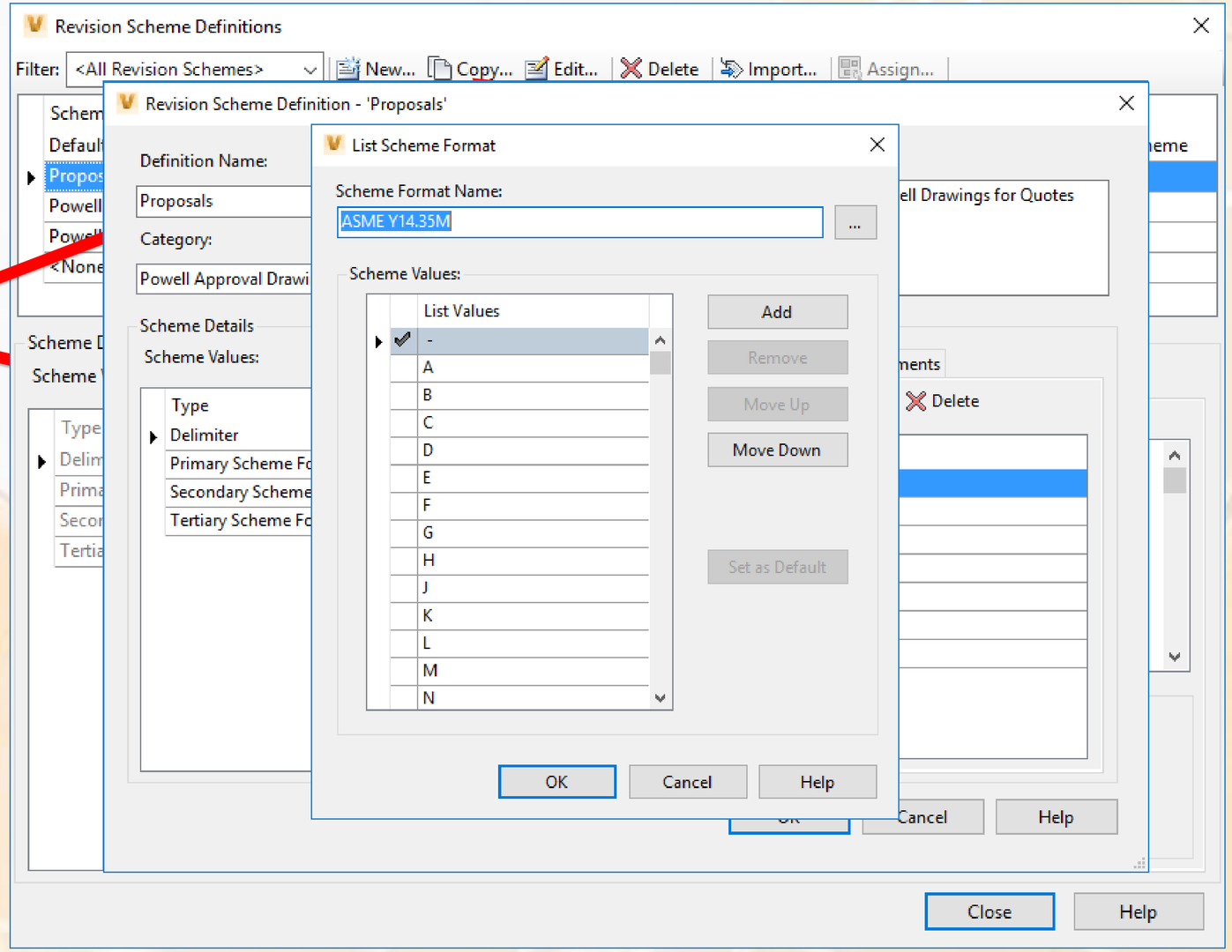
Vault Settings – Revisions

Revisions Scheme Definitions..

Rev. Scheme Edit.



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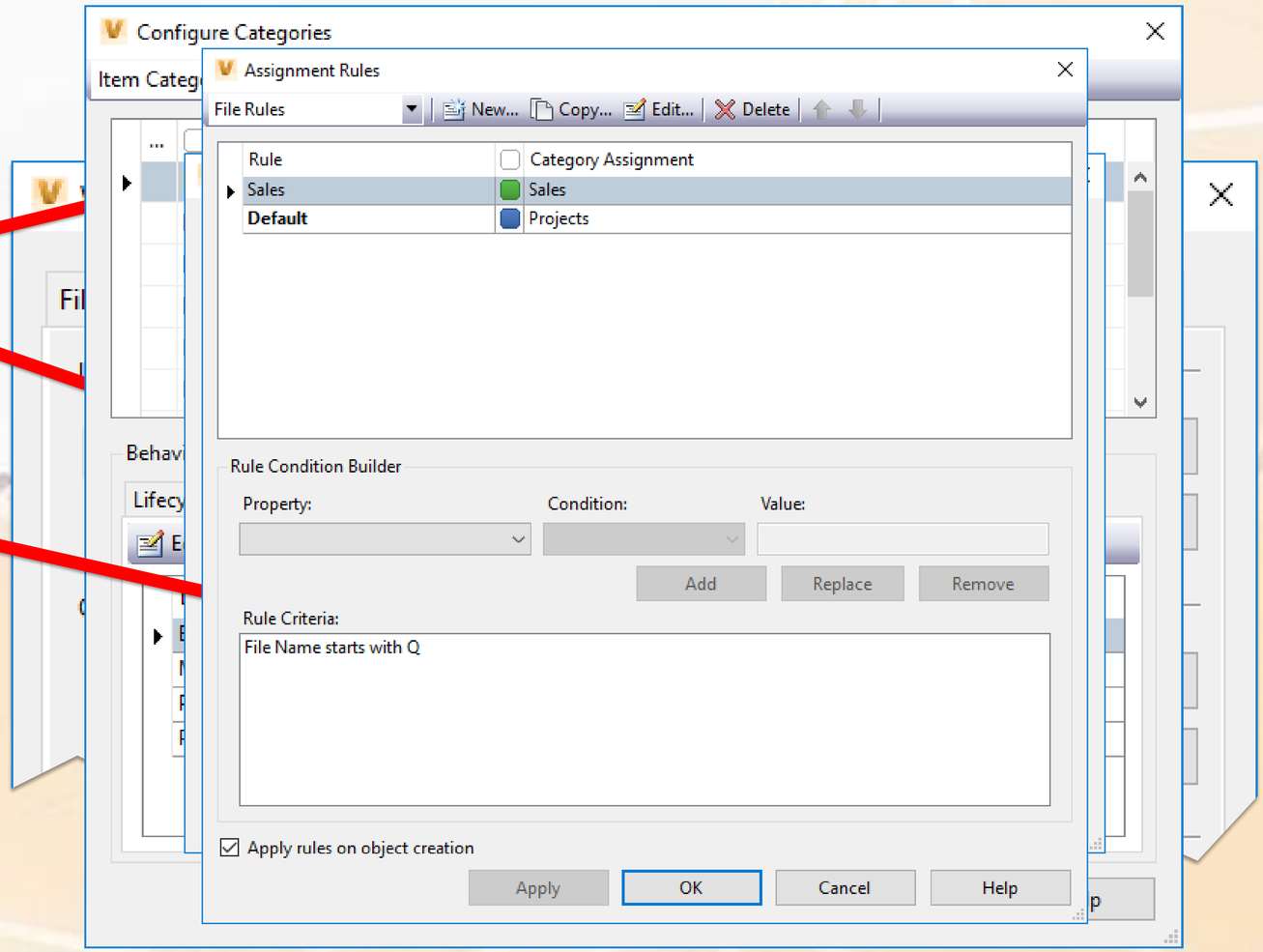
Vault Settings – Categories

Configure Categories.

Rev. Scheme Edit.

Rules.



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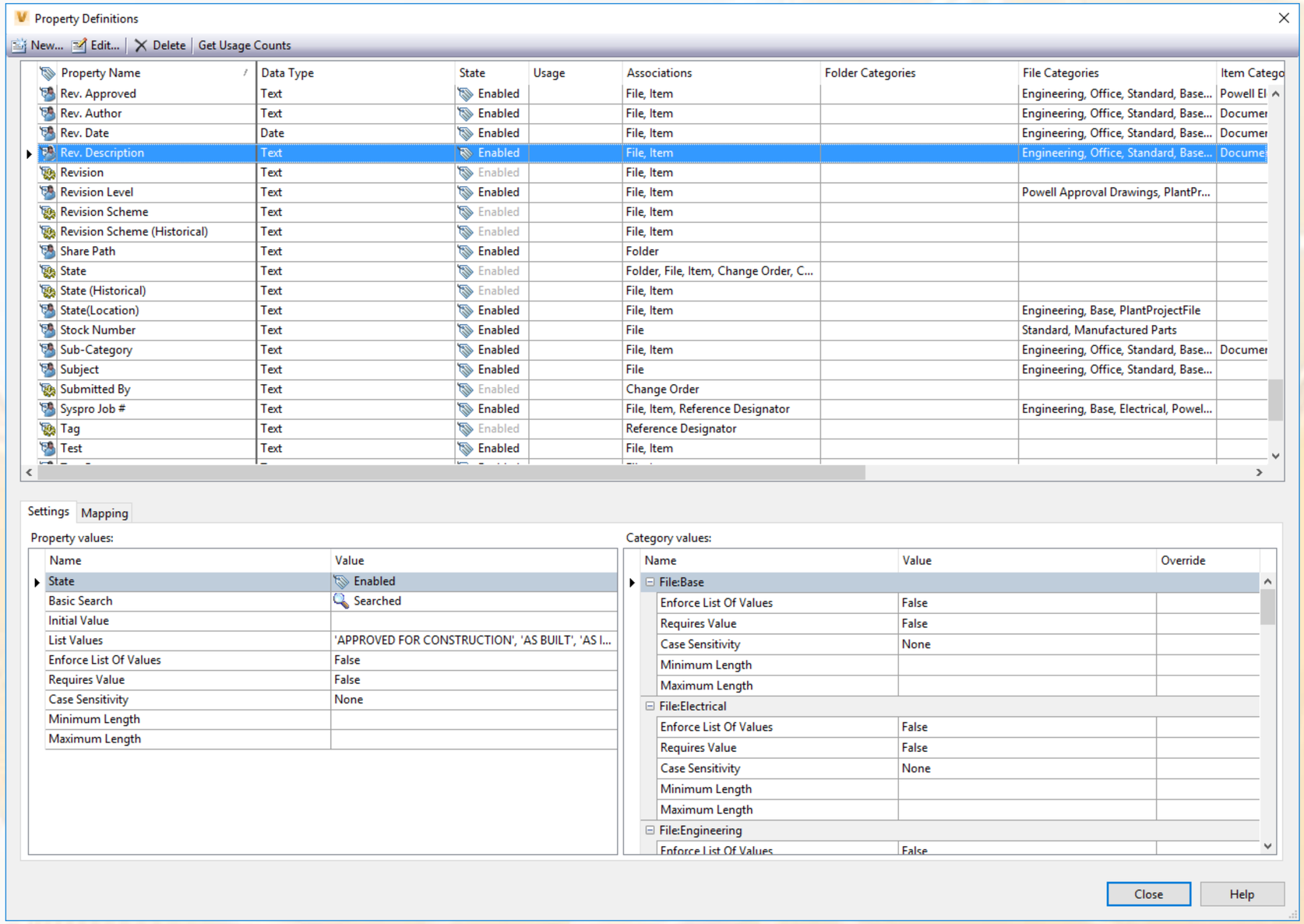
Vault Settings – Properties

AU2017 Class on Properties can be found at [this link](#).

Just don't listen to the recording…. Please….



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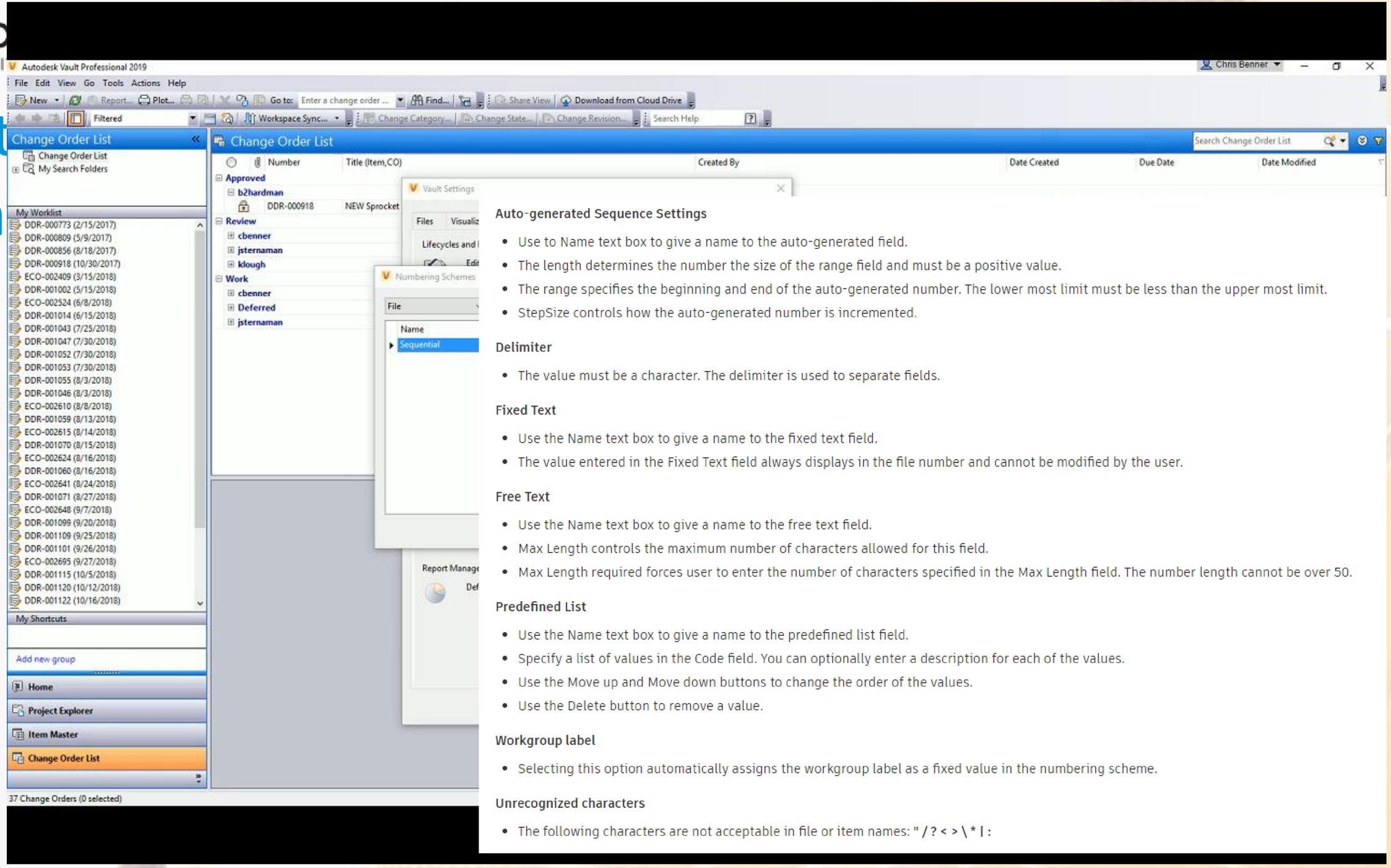

Auto-generated Sequence Settings

- Use to Name text box to give a name to the auto-generated field.
- The length determines the number the size of the range field and must be a positive value.
- The range specifies the beginning and end of the auto-generated number. The lower most limit must be less than the upper most limit.
- StepSize controls how the auto-generated number is incremented.

Delimiter

- The value must be a character. The delimiter is used to separate fields.

Fixed Text

- Use the Name text box to give a name to the fixed text field.
- The value entered in the Fixed Text field always displays in the file number and cannot be modified by the user.

Free Text

- Use the Name text box to give a name to the free text field.
- Max Length controls the maximum number of characters allowed for this field.
- Max Length required forces user to enter the number of characters specified in the Max Length field. The number length cannot be over 50.

Predefined List

- Use the Name text box to give a name to the predefined list field.
- Specify a list of values in the Code field. You can optionally enter a description for each of the values.
- Use the Move up and Move down buttons to change the order of the values.
- Use the Delete button to remove a value.

Workgroup label

- Selecting this option automatically assigns the workgroup label as a fixed value in the numbering scheme.

Unrecognized characters

- The following characters are not acceptable in file or item names: " / ? < > \ * | :

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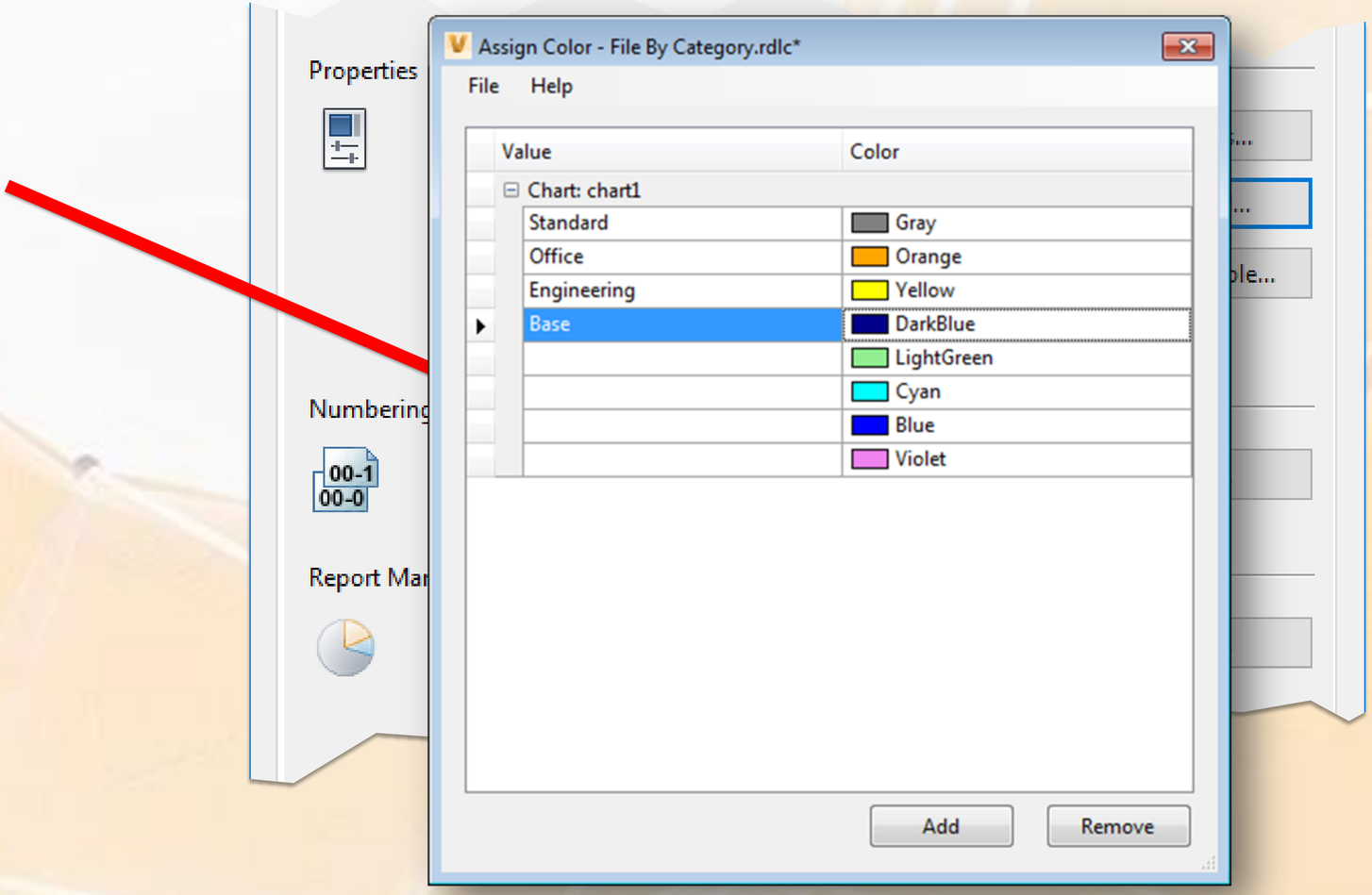
Vault Settings – Report Color Assignment

Define Report Color Assignment

Available after a report is run.

Feature of Inventor Add in

Vault Workgroup & Pro only



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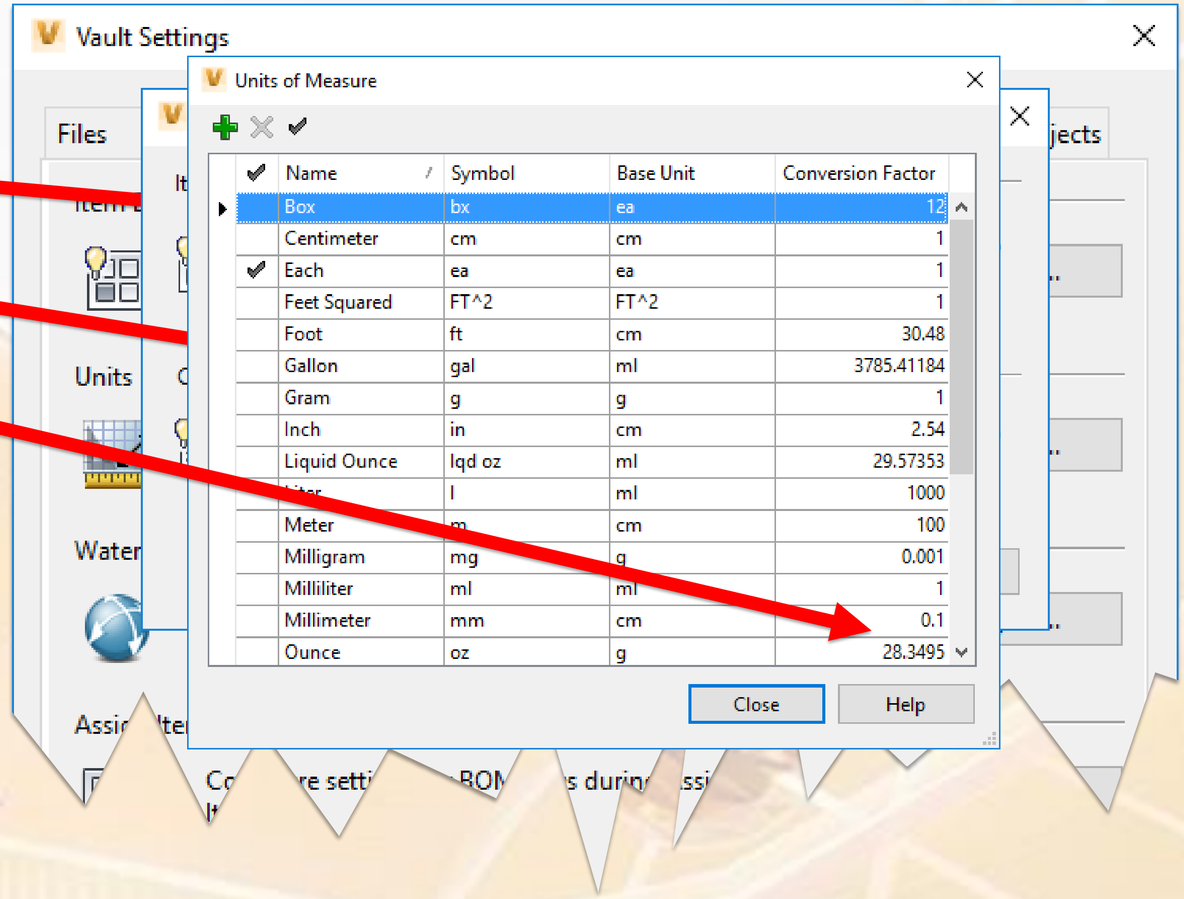
Vault Settings – Items Tab

Visibility of Item Features

Configure Units

Watermarking

Lifecycle, Property, Custom or None



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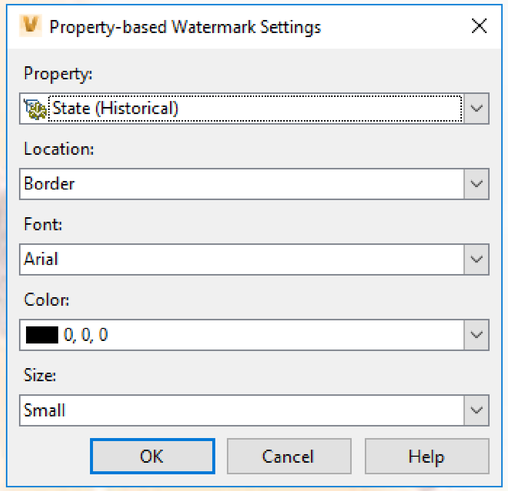
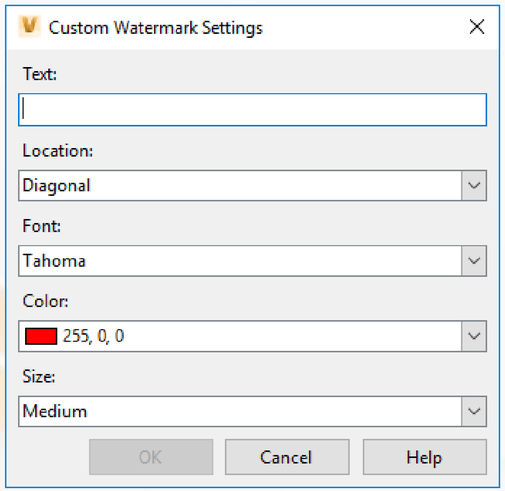
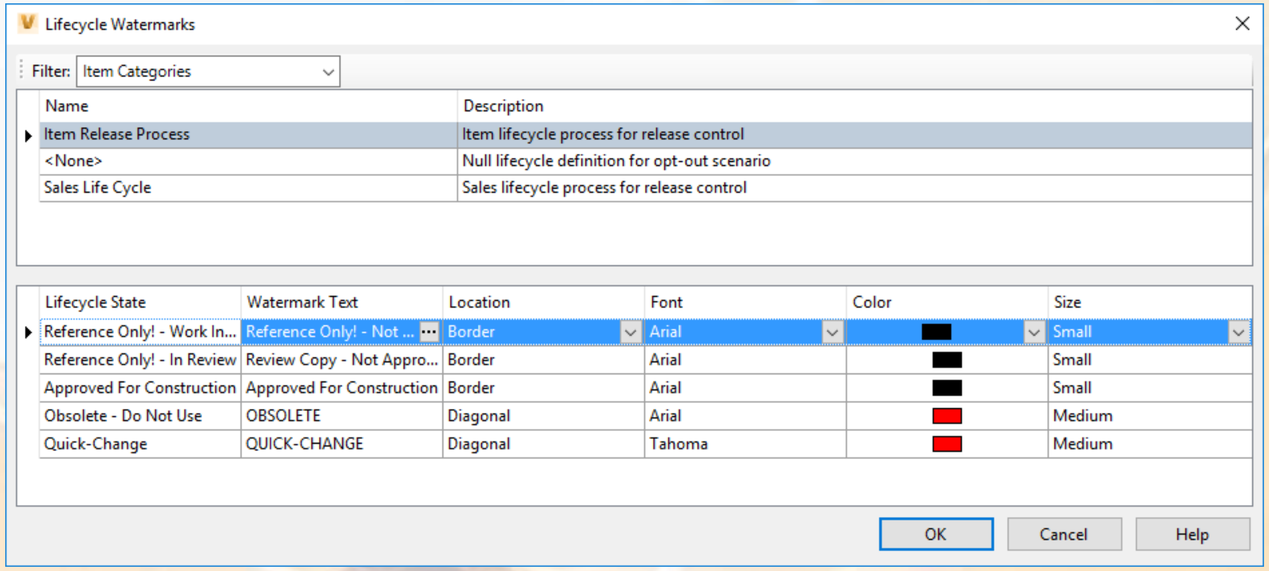
Vault Settings – Items Tab



Property Based Watermarks



Custom Watermarks



Lifecycle Watermarks

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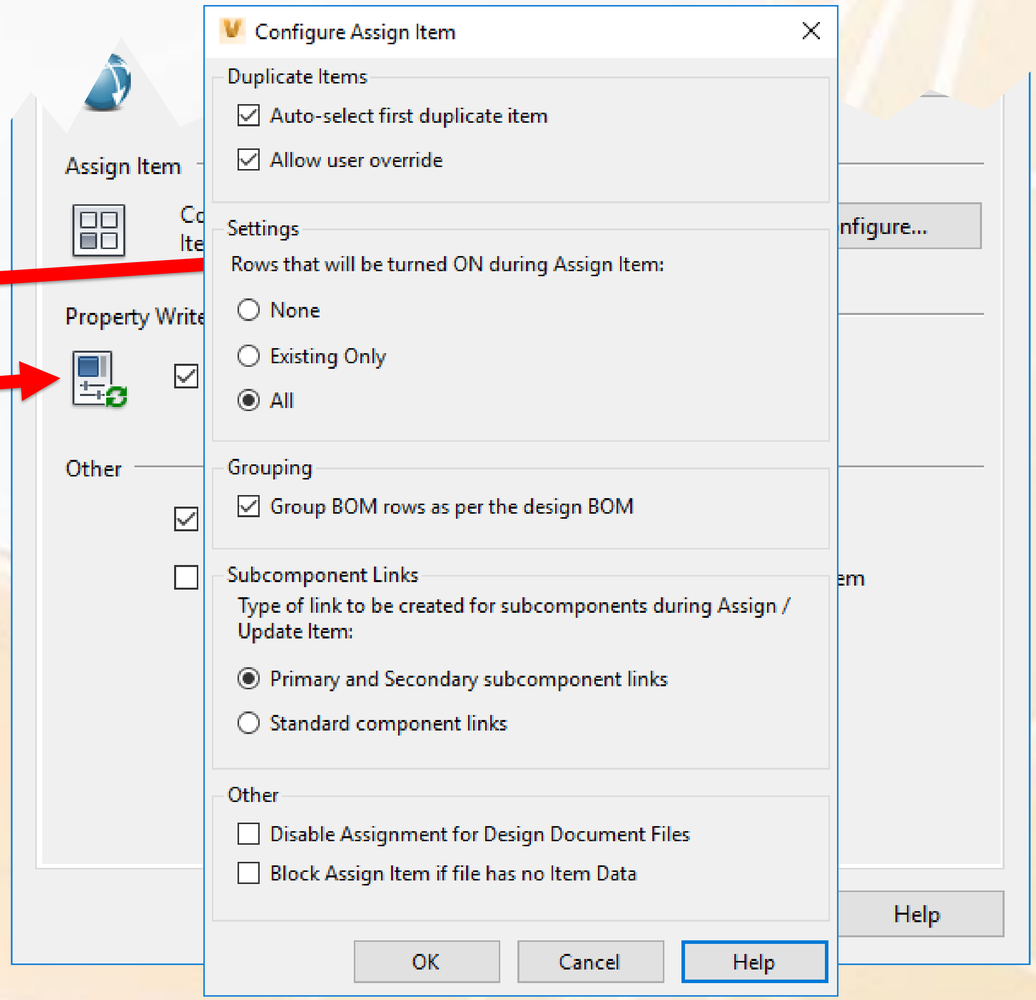
Vault Settings – Items Tab

BOM Row Settings

Property Write Back



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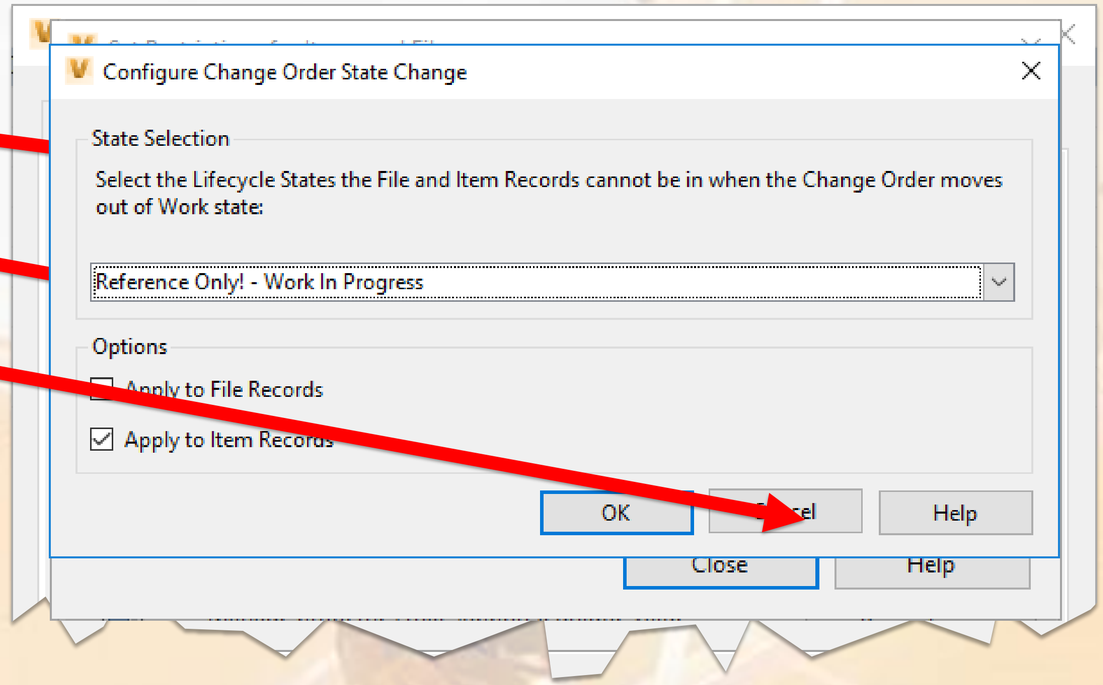
Vault Settings – Change Orders Tab

Set Change Order Visibility

Restrict State Changes

Change Order Work State Change



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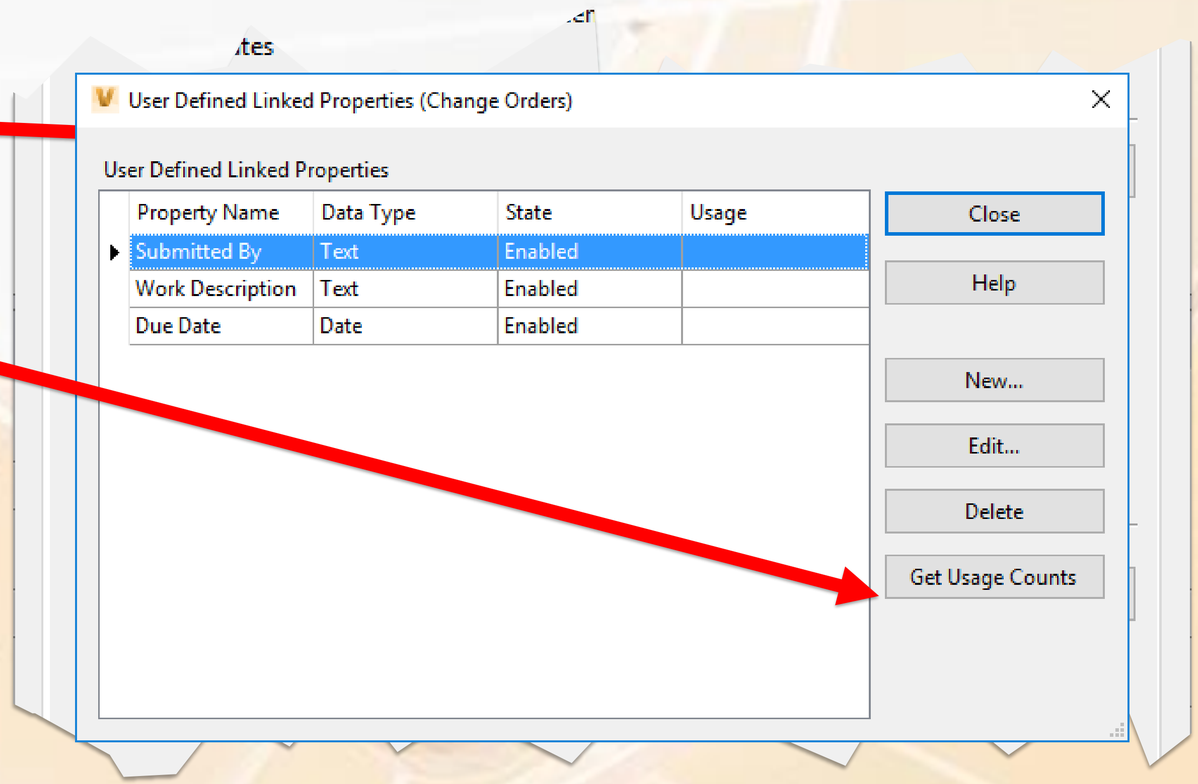
Vault Settings – Change Orders Tab

ECO Markup Folder

Link Properties



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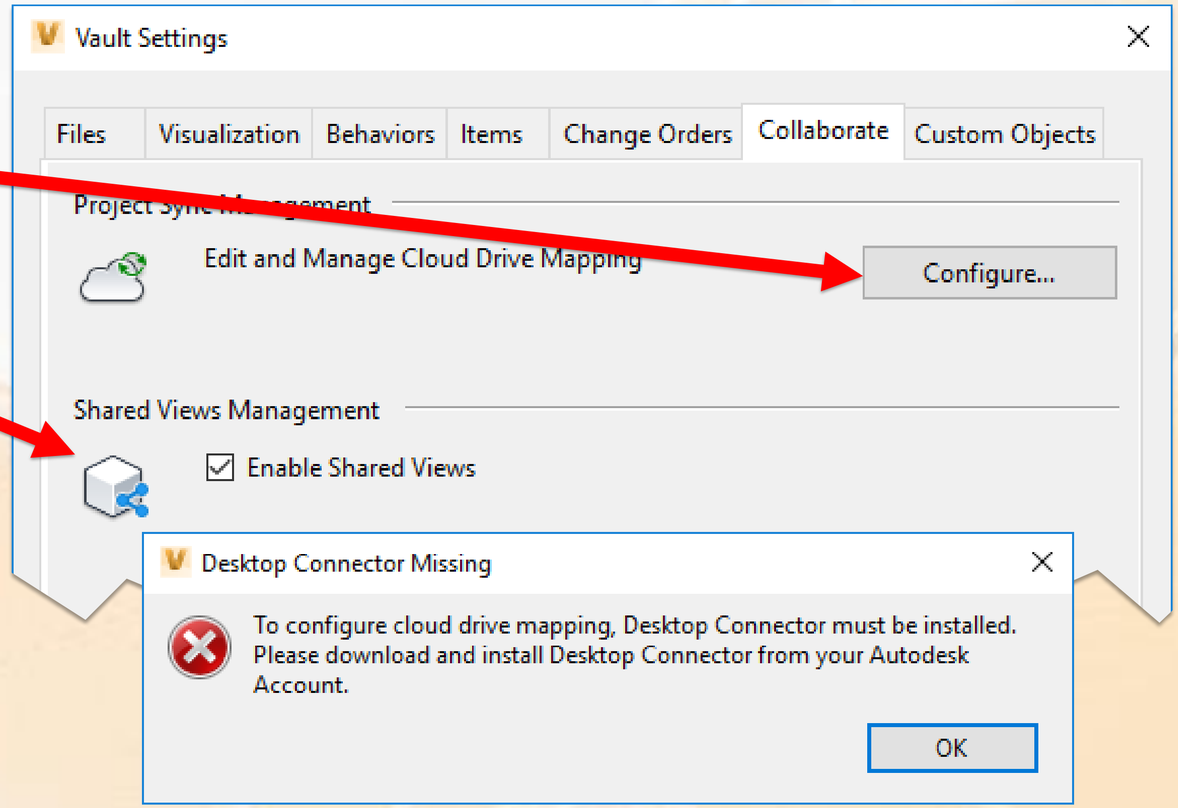
Vault Settings – Collaborate Tab

Project Sync.

Shared Views

Subscription only benefit for Vault Workgroup & Professional

User most also have the benefit assigned to them through Autodesk Account



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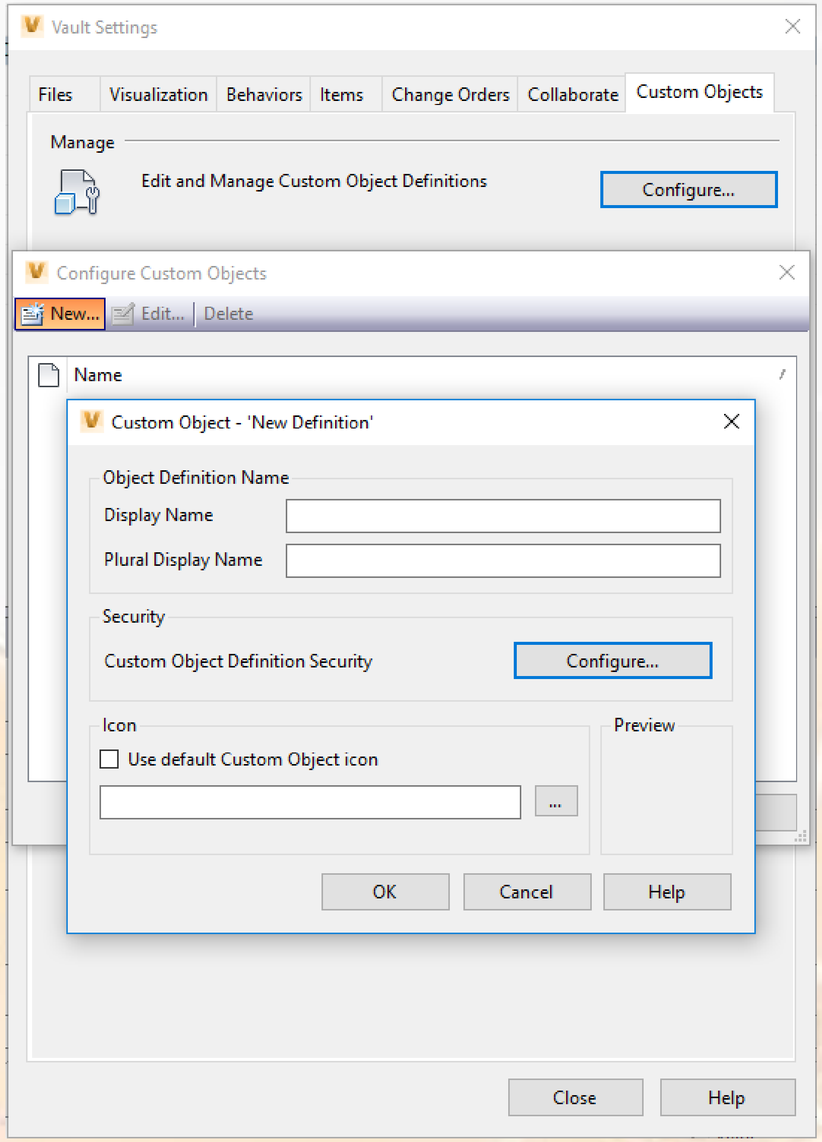
Vault Settings – Custom Objects Tab



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Global Settings

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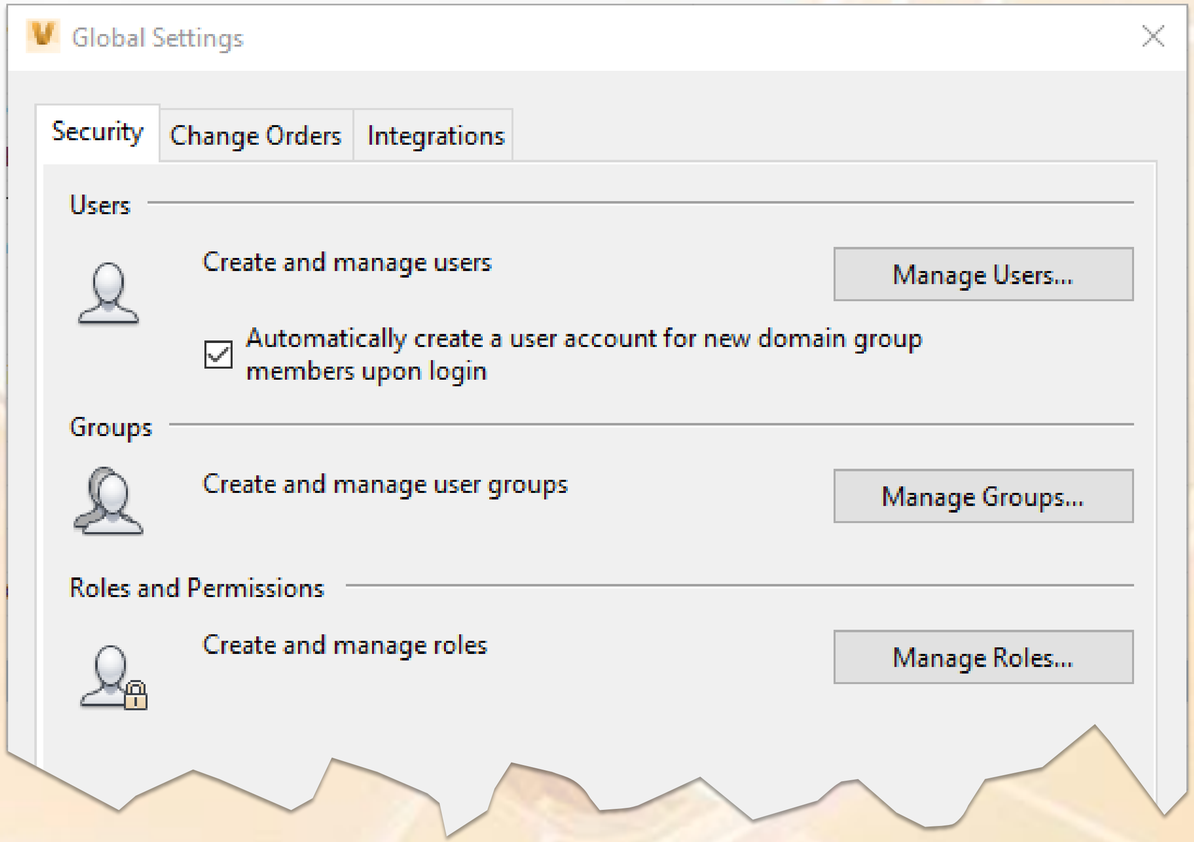
Global Settings – Security Tab

All that stuff Mark talked about earlier….

Go here!



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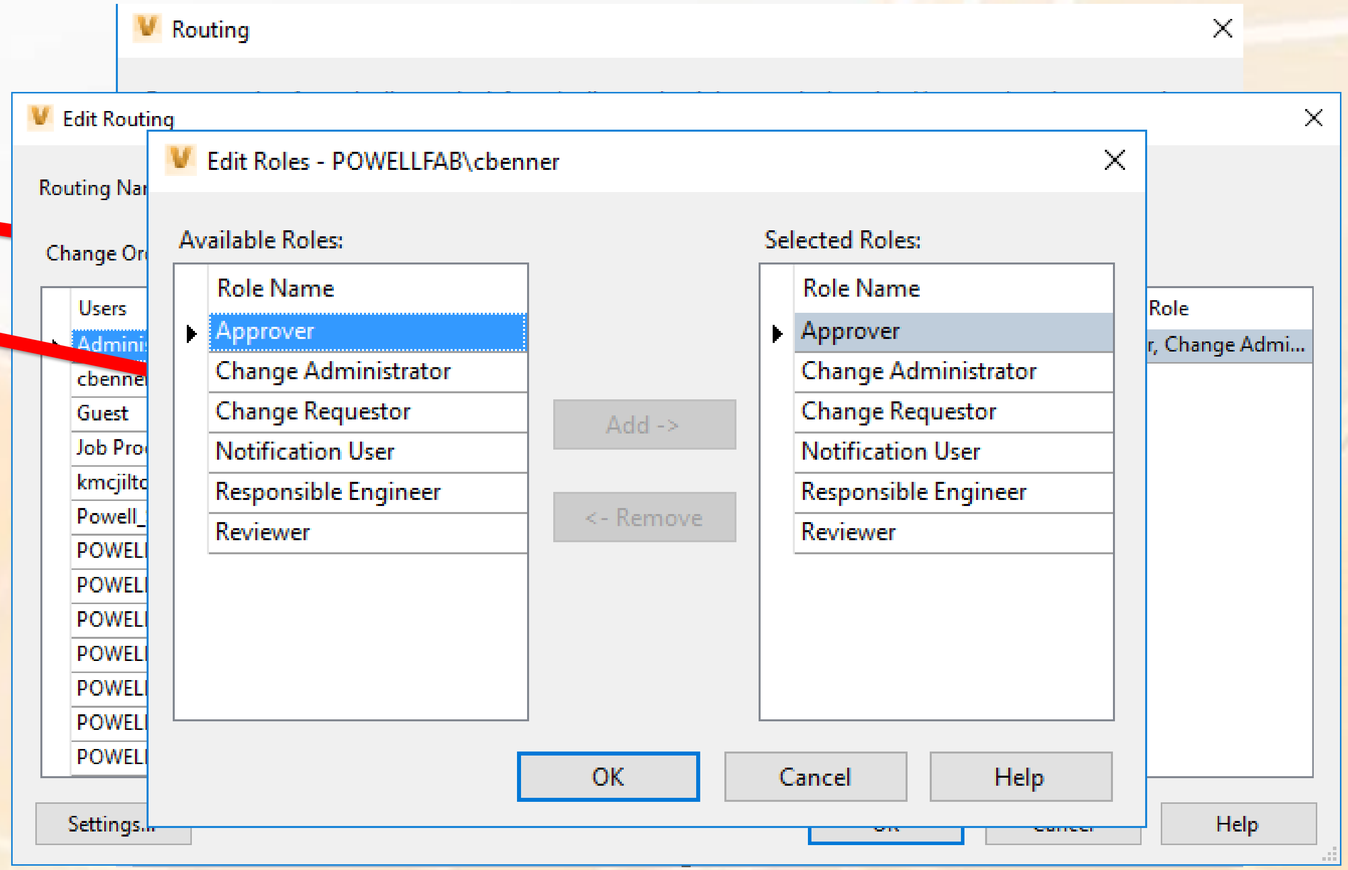
Global Settings – Change Orders Tab

ECO Routing

Workflow Definition



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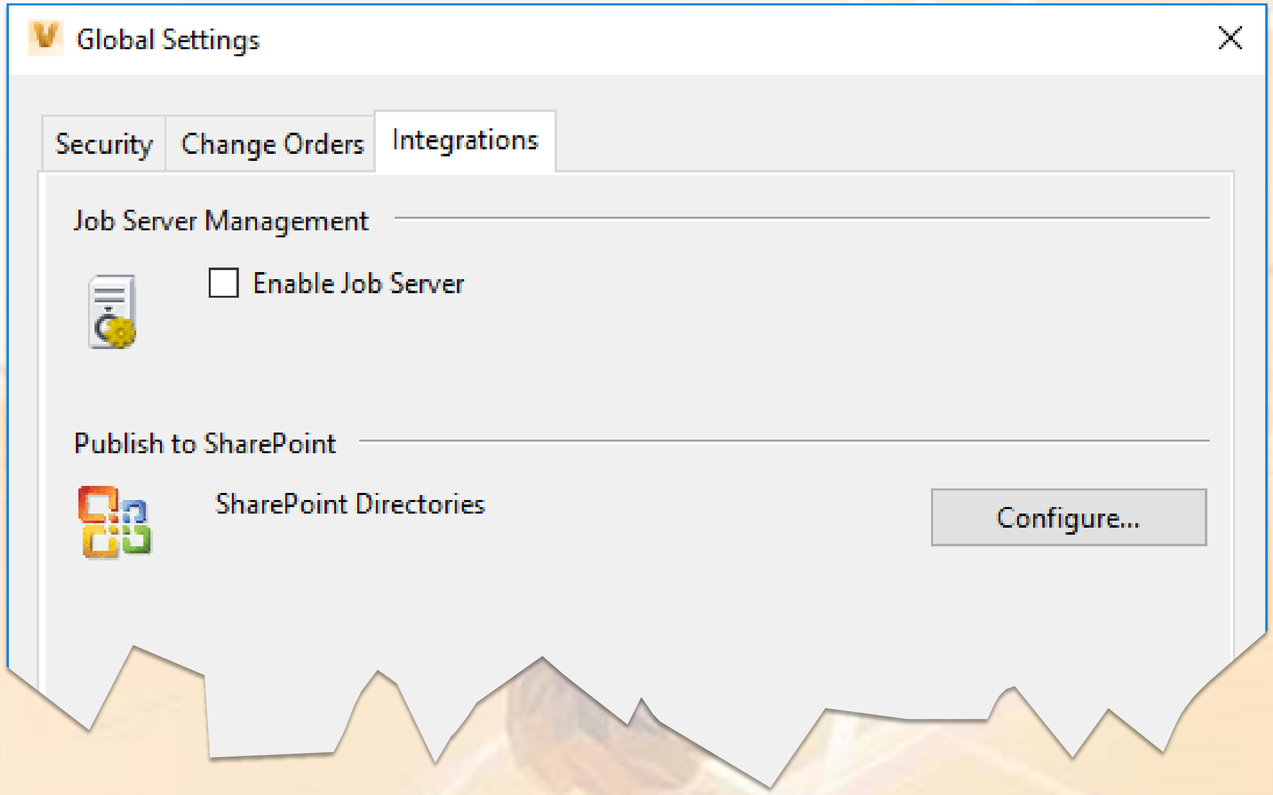
Global Settings – Integrations Tab



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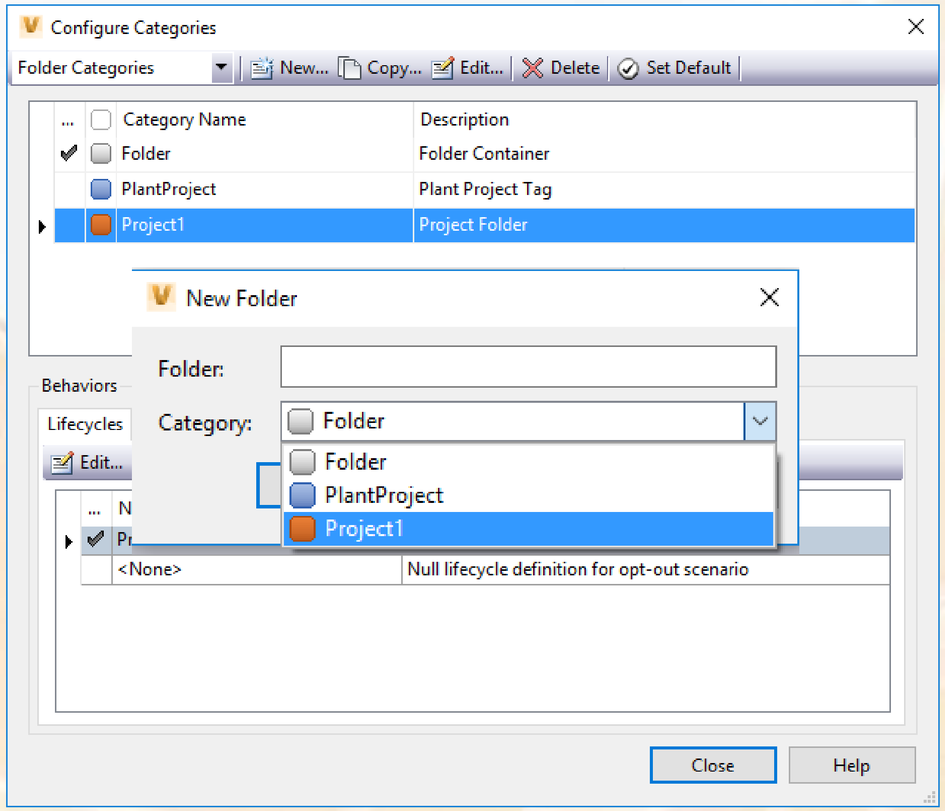
Vault Project Folders

Create A Folder Category

Create A New Folder Location

Add new data, or create links to existing data, to organize related data into the Project Folder.



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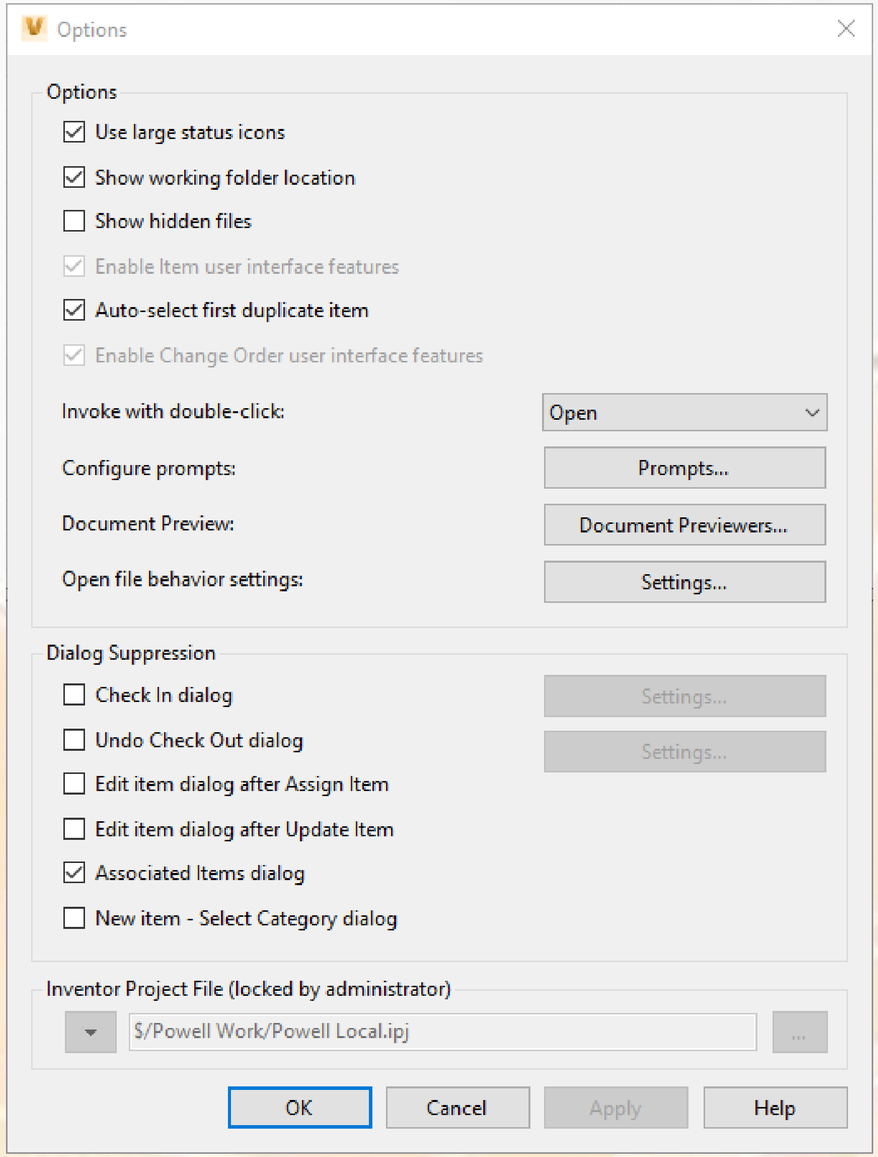
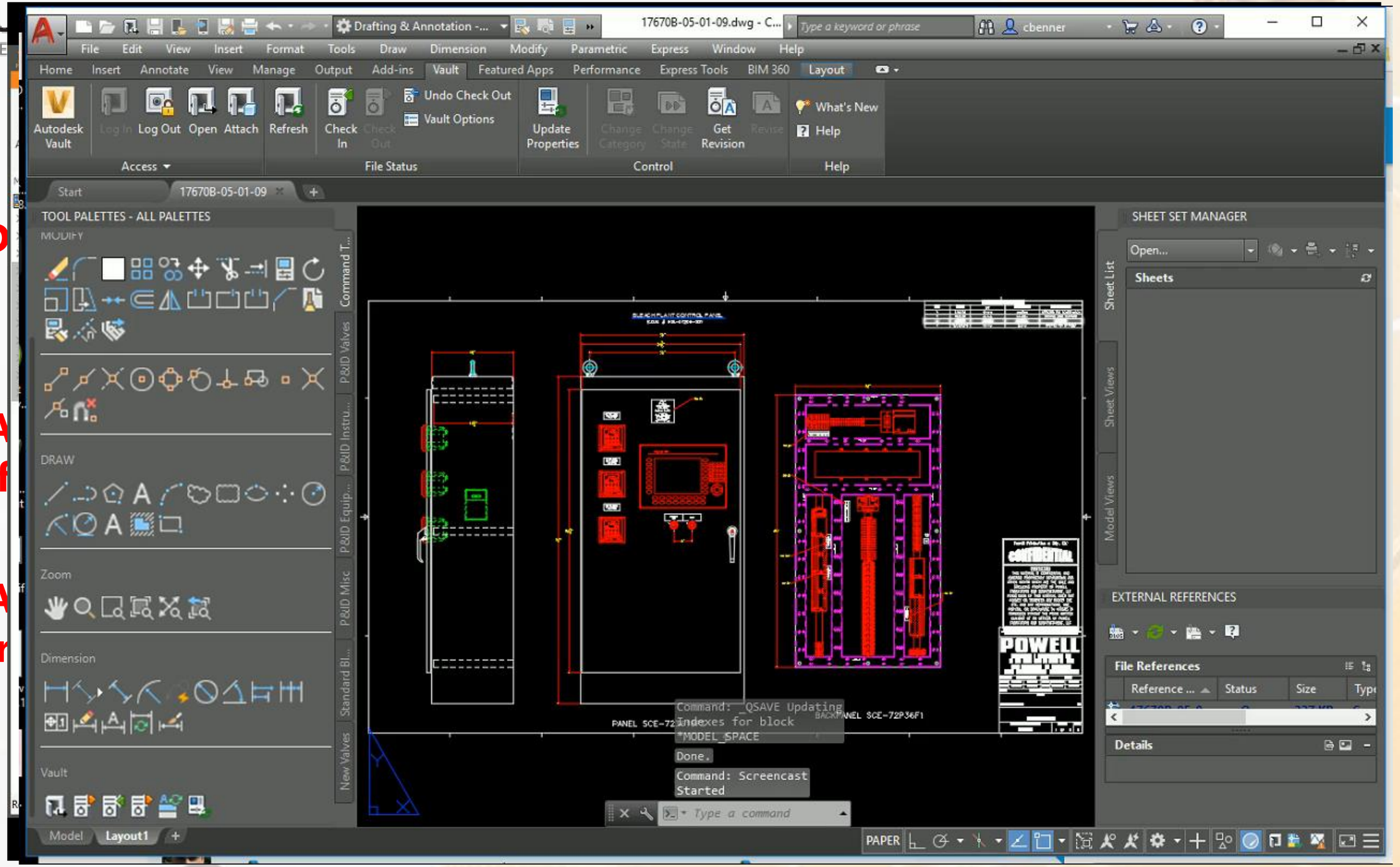
Vault User Options

Tools\Options




Drafting & Annotation -...
17670B-05-01-09.dwg - C...
Type a keyword or phrase
cbenner
File Edit View Insert Format Tools Draw Dimension Modify Parametric Express Window Help
Home Insert Annotate View Manage Output Add-ins Vault Featured Apps Performance Express Tools BIM 360 Layout
Autodesk Vault
Log In
Log Out
Open
Attach
Refresh
Check In
Check Out
Undo Check Out
Vault Options
Update Properties
Change Category
Change State
Get Revision
Revise
What's New
Help
Access
File Status
Control
Help
Start
17670B-05-01-09
TOOL PALETTES - ALL PALETTES
MODIFY
DRAW
Zoom
Dimension
Vault
Command T...
P&ID Valves
P&ID Instru...
P&ID Equip...
P&ID Misc
Standard Bl...
New Valves
SHEET SET MANAGER
Open...
Sheets
Sheet List
Sheet Views
Model Views
EXTERNAL REFERENCES
File References
Reference ...
Status
Size
Details
Command: _QSAVE Updating Indexes for block *MODEL_SPACE
Done.
Command: Screencast Started
Type a command
Model
Layout1
PAPER

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Other Vault Classes This Week:

- MFG228256-R - Ask the Vault Developer - Wed. Nov. 14th, 8:30-10:00 AM
- IM223989 - Whose Version Should We Believe? Revising the Story with Vault. – Tues. Nov. 13th, 4:30-5:30 PM
- MFG223053 - Looking into the Crystal Ball: The Future of PDM at Autodesk – Thur. Nov. 15th, 2:45-3:45 PM
- IM226113 - Connect Vault with ERP: Items, Bills Of Materials, Files, and More – Tues. Nov. 13th, 4:30-5:30 PM
- Many others in the catalog! Don’t forget the Answer Bar!

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THANK YOU

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