

# MFG219615 – Autodesk Vault Configuration Part 1

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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.

## 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



## 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.



Home:





# About Powell Fabrication & Manufacturing, LLC

[www.powellfab.com](http://www.powellfab.com)





## 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

# Congratulations!





## 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





## Vault Settings & Configuration



# Laying the foundation for your Vault

AKA: Roles, Users, Groups, and Permissions





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





# Roles

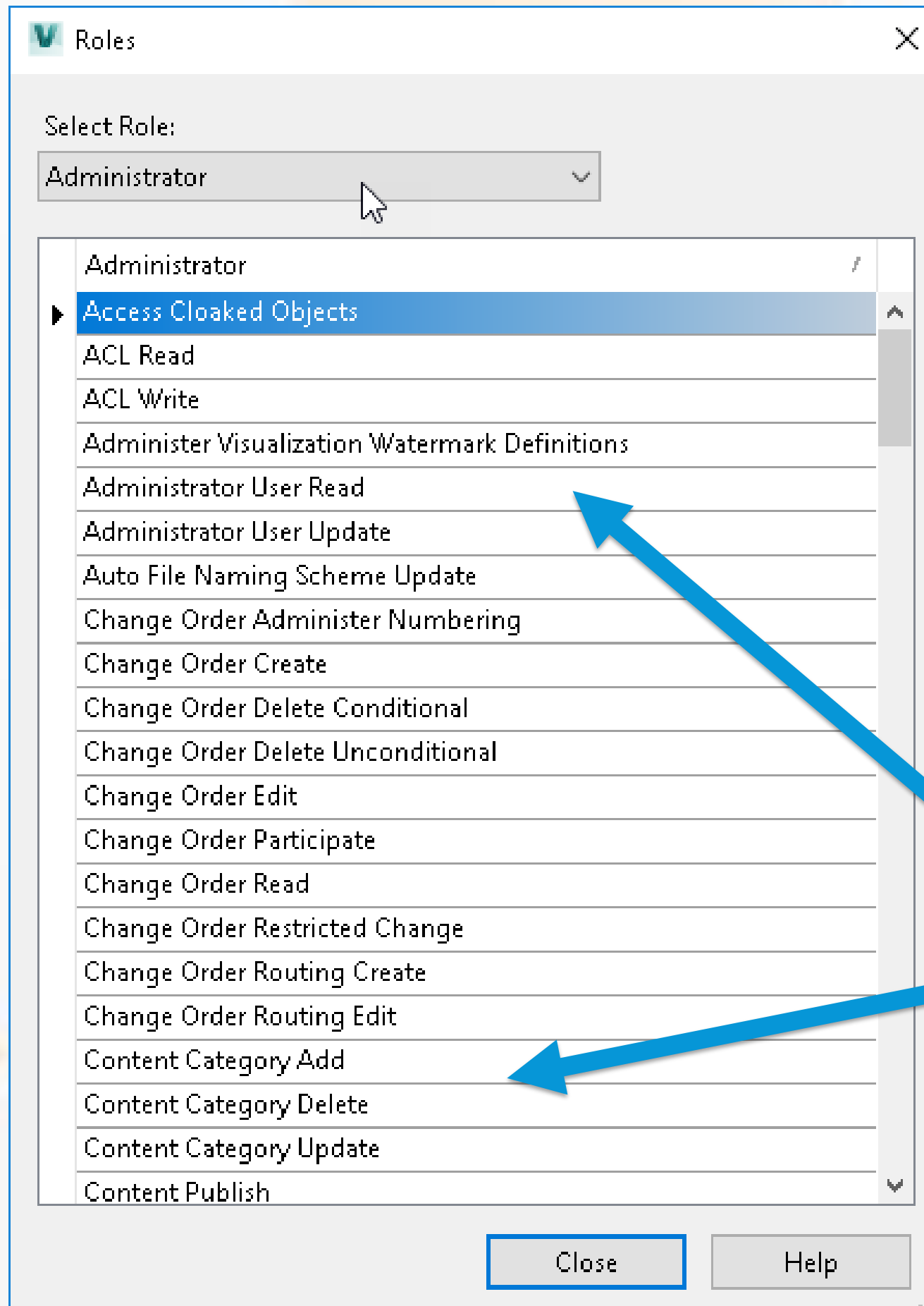
# What are Roles?

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



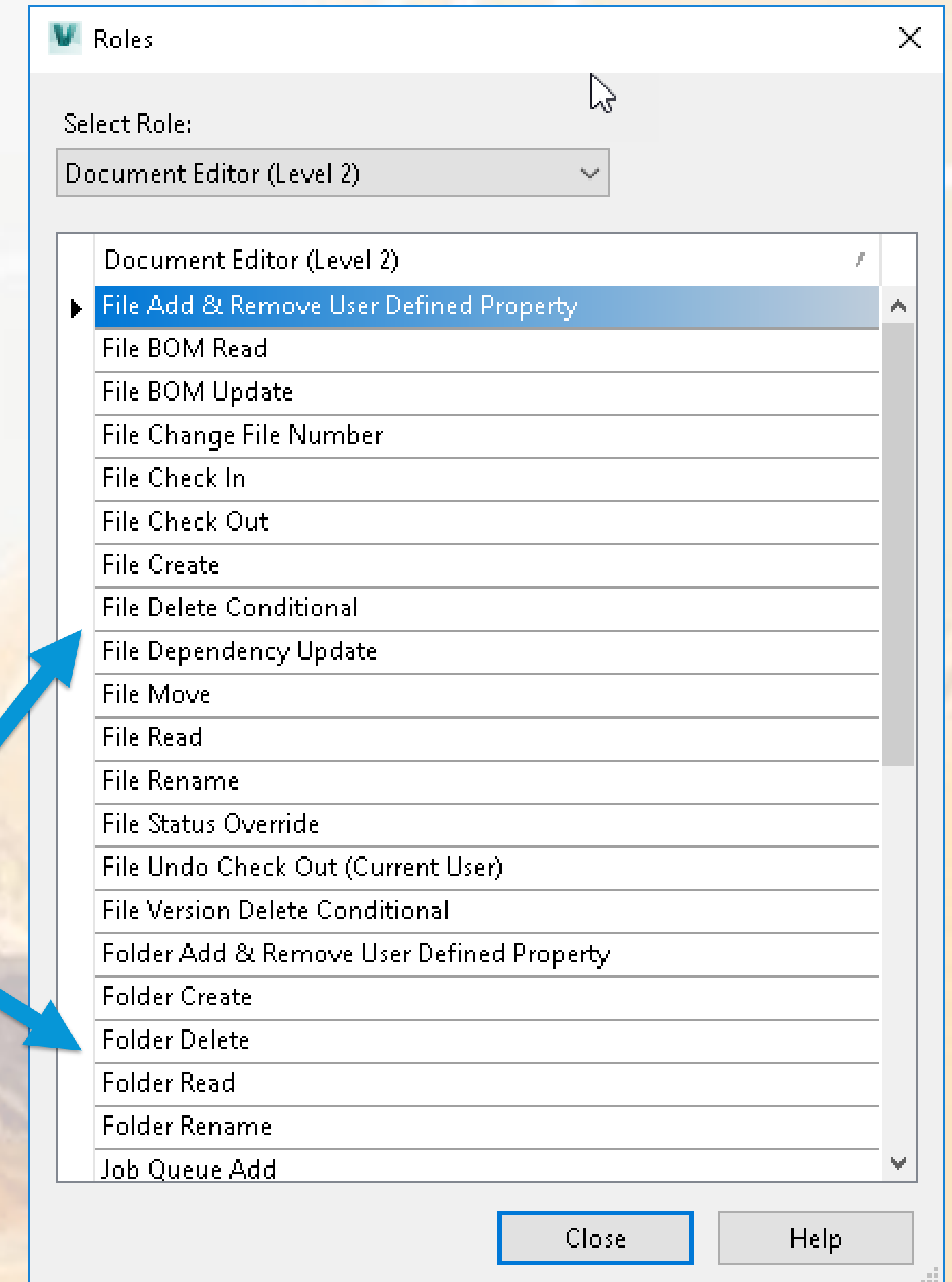


# Pre-defined Roles



## Vault Administrator

Pre-defined Role

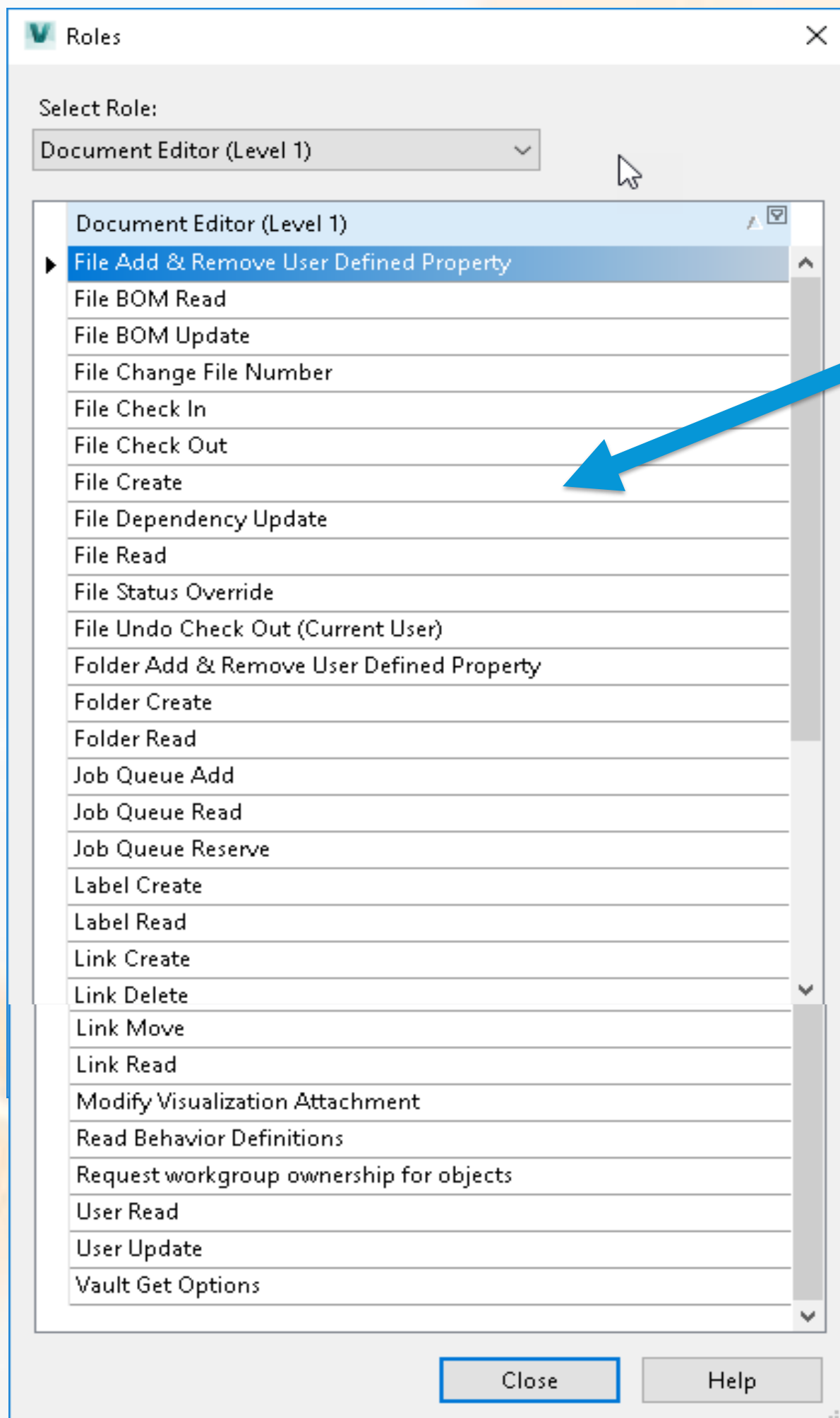


## Document Editor (level 2)

Pre-defined Role

**Permitted Functions  
within Vault**

# Overlapping Abilities



Document Editor (Level 1)

Defined functions

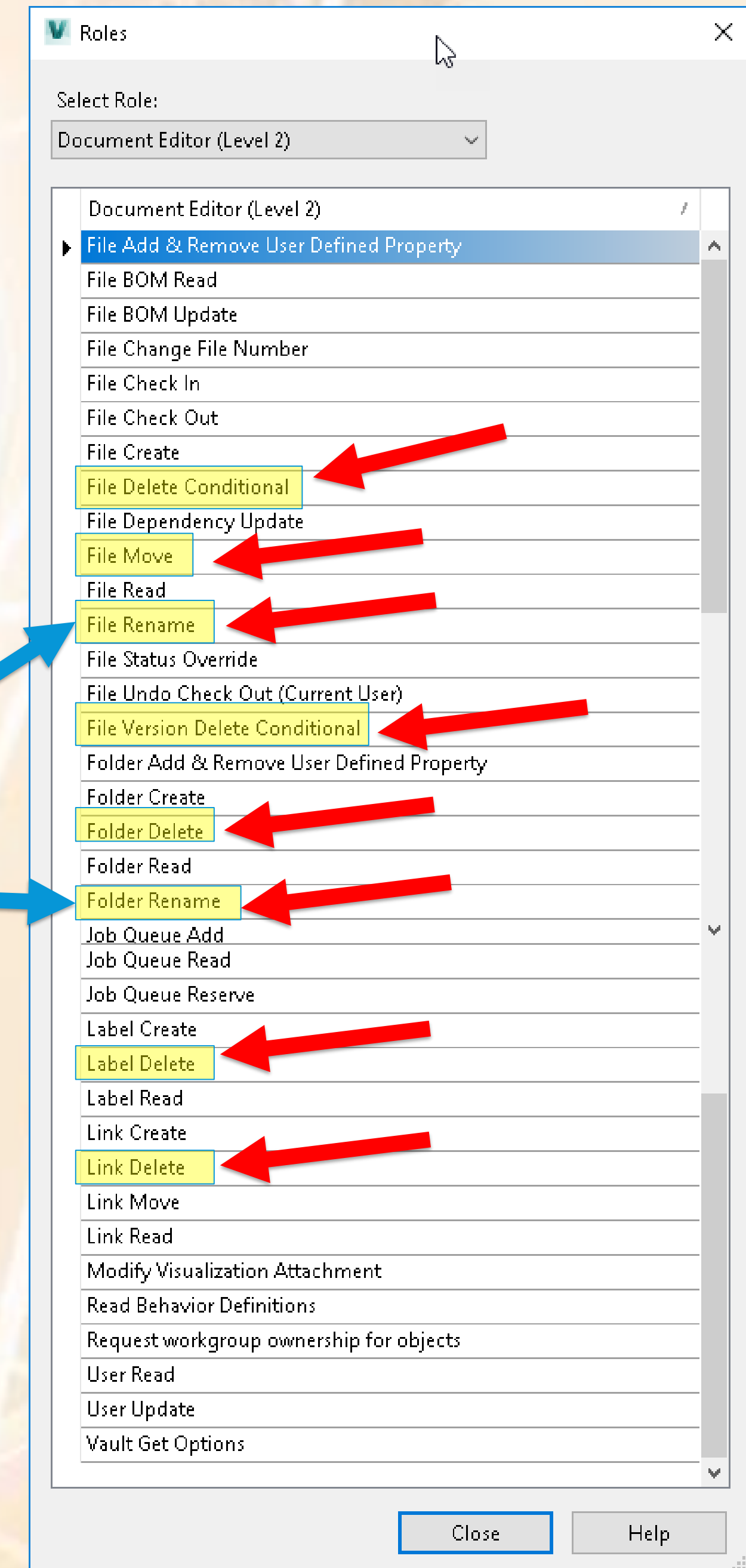
Document Editor (Level 2)

Level 1 + highlighted functions

User assigned both roles?

**Lowest role is winner**

**Highlighted functions no longer permitted**





# 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	Full privileges within to all folders all the time and administrative privileges on the	1	Change Order Editor Level 2	Configuration Administrator	Content Center Administrator
3	Vault User						Content Ce
4	John Depp						
5	Tony Tiger						
6							
7							



# Roles & Permissions

Vault Workgroup/Pro only

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



# Roles & Permission

Vault Workgroup/Pro only

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

I'm the Vault Admin I can do anything I like within Vault

Well I'm the Engineering Manager and I don't want you to modify or delete our Area 51 CAD files





# Vault User Accounts/User Management

# 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





# Vault Administrator - Static

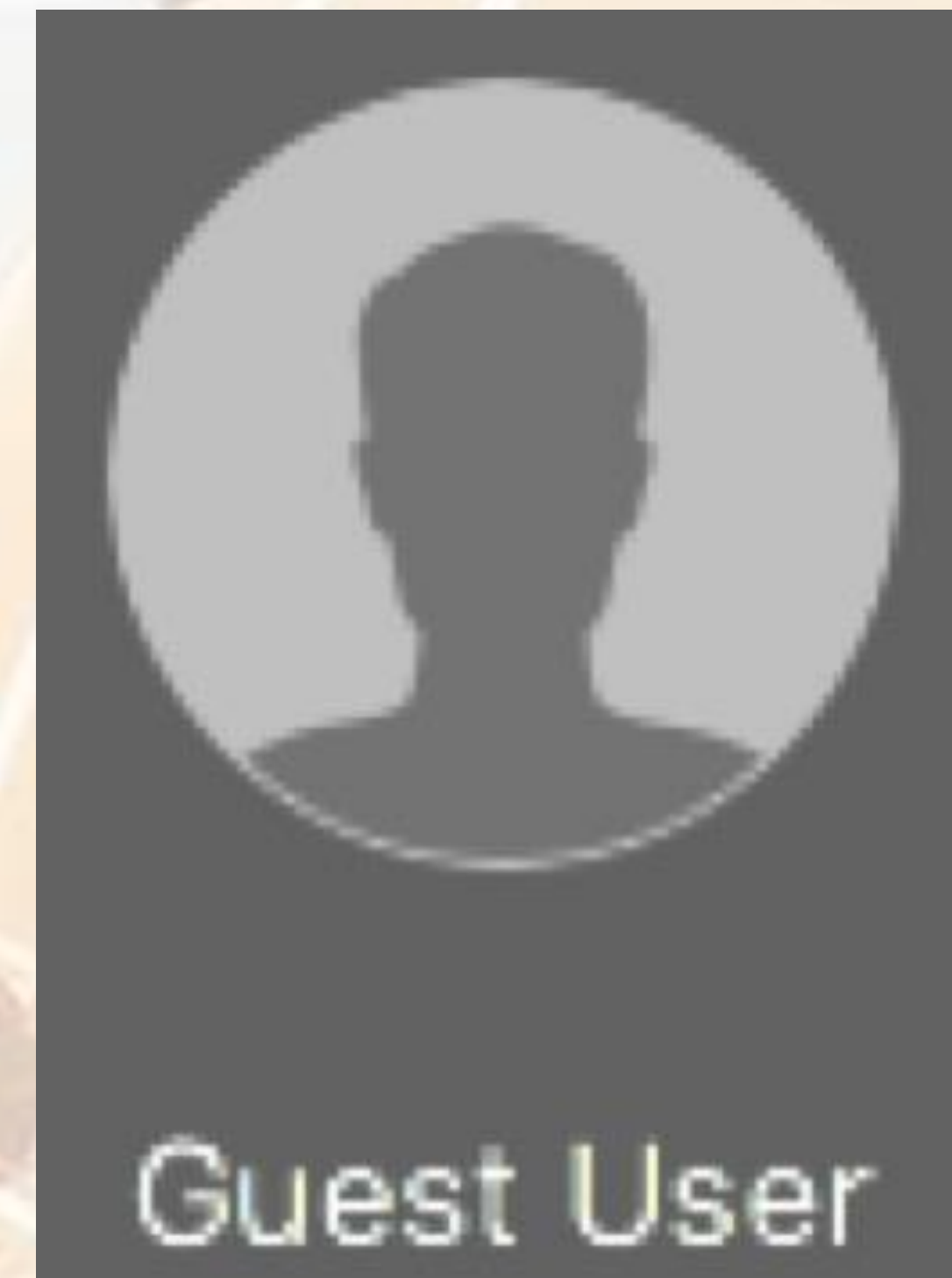
- Administrator → Account name
- Blank password → **Change it!!!**
- Disable?
- Designate 2 Vault Admins
- Separate user/admin account
- IT Group/Train
- **DON'T LOCK OUT ADMIN!!!**





# Guest - Static

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





# 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.

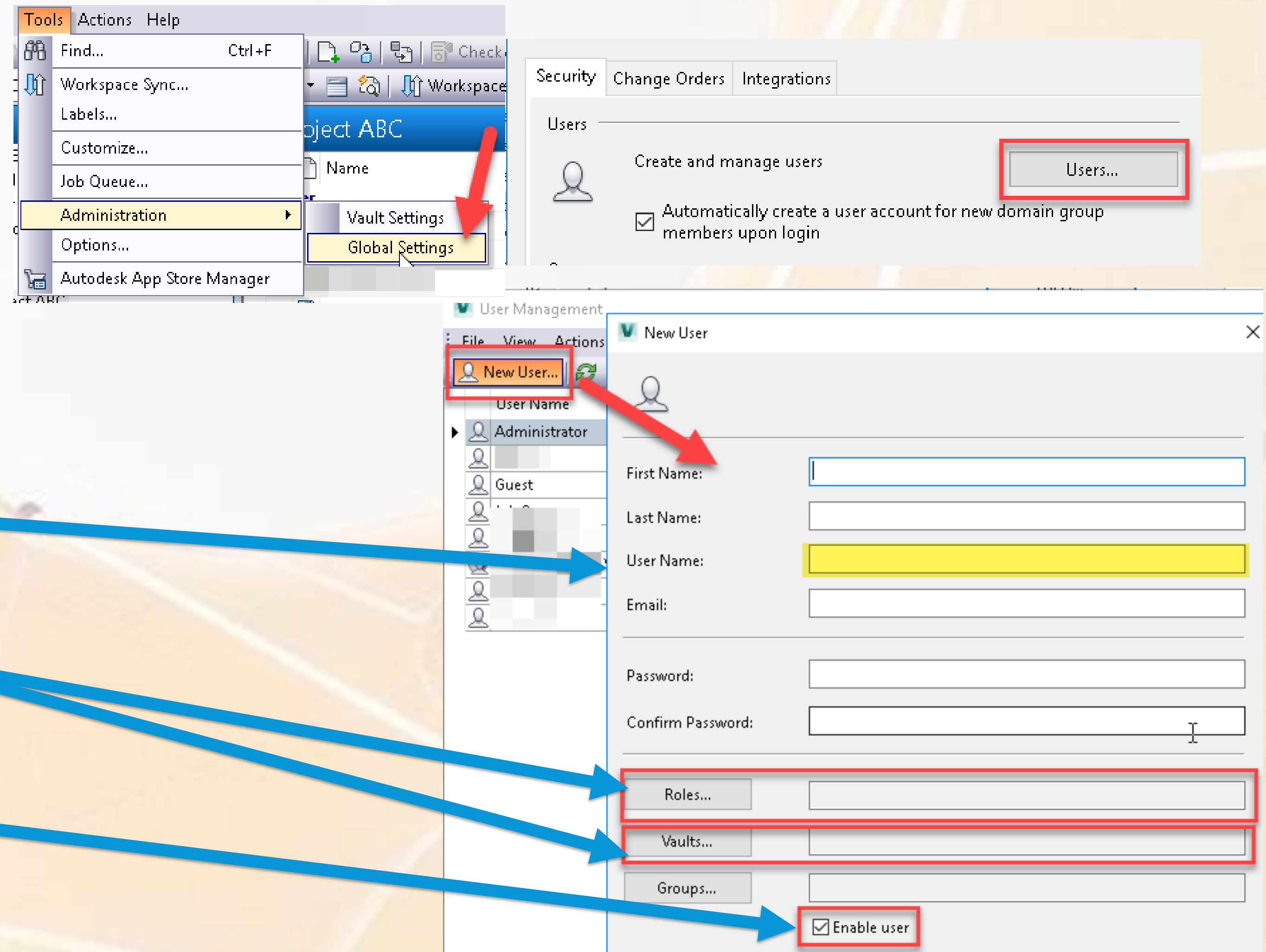
*Modifying, disabling or promoting/demoting is only permitted*





# Static Account - Creation

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



# Static Account - Creation

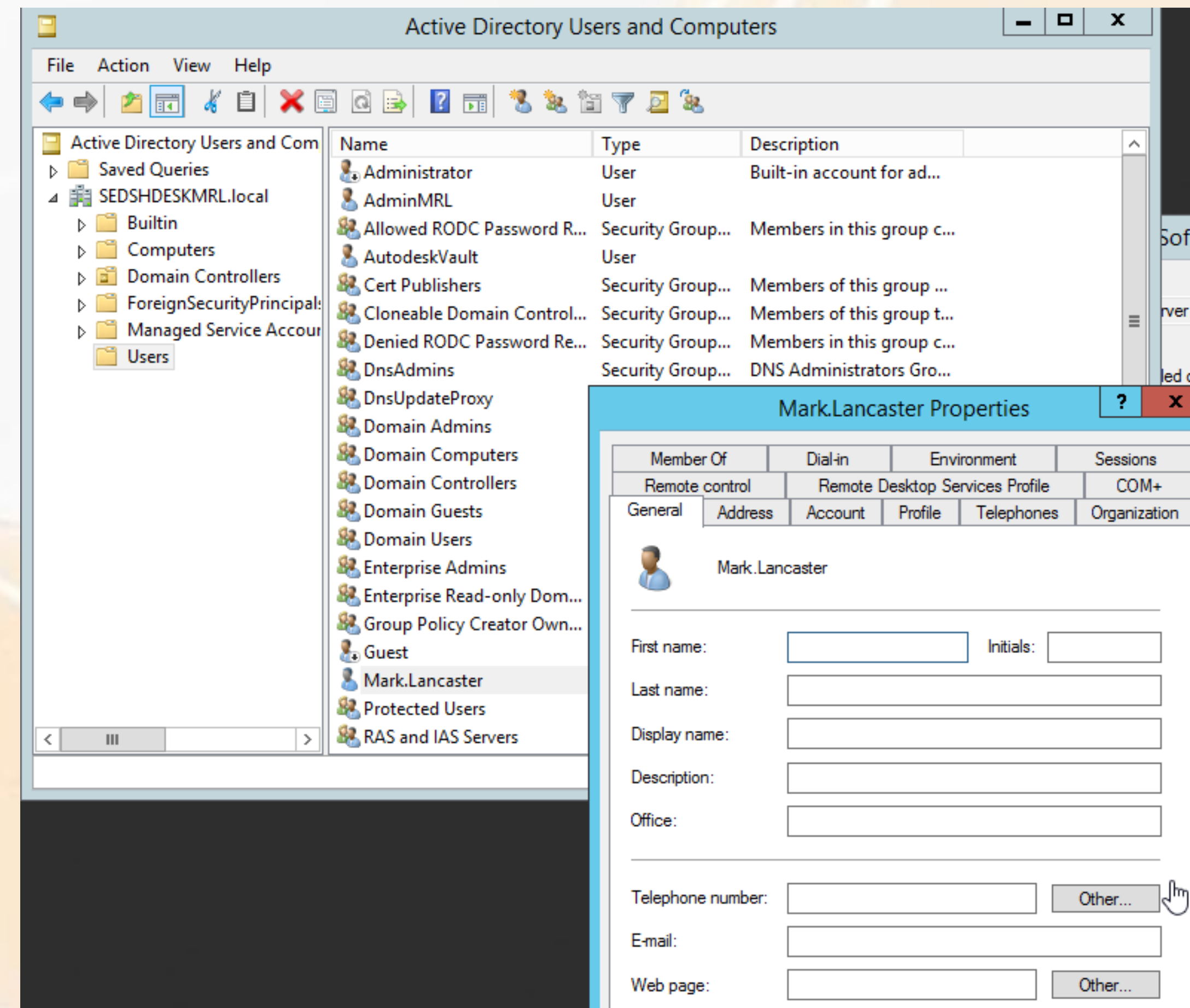




# Active Directory Domain Account

Vault Professional Only

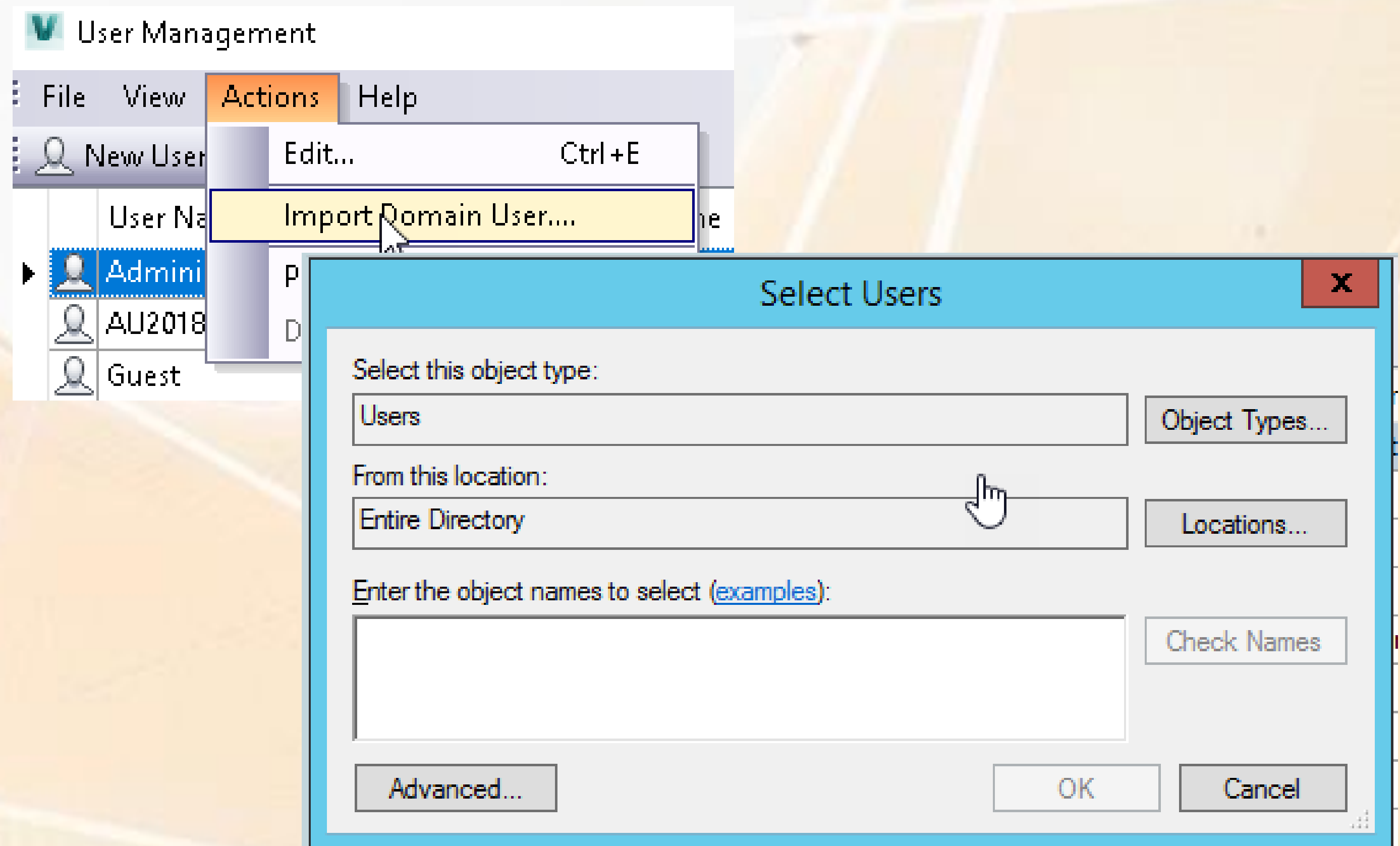
- Active Directory Account
- Credentials/Windows Log in
- Account Update
- Managed → Active Directory



# Active Directory Domain Account

Vault Professional Only

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





# Static vs Active Directory Domain Account

Vault Professional Only

## Static Vault Account

User Management

File View Actions Help

New User... [Refresh] [Print] [Export]

	User Name	First Name
▶	Administrator	
	AU2018	
	Guest	
	Job.Server	Job
	MarkLancaster	Mark
	SEDSHDESKMRL\Mark.Lancaster	

Domain Account Name

Domain Server Name

Active Directory Domain Account (imported)



# Vault Groups/Group Management



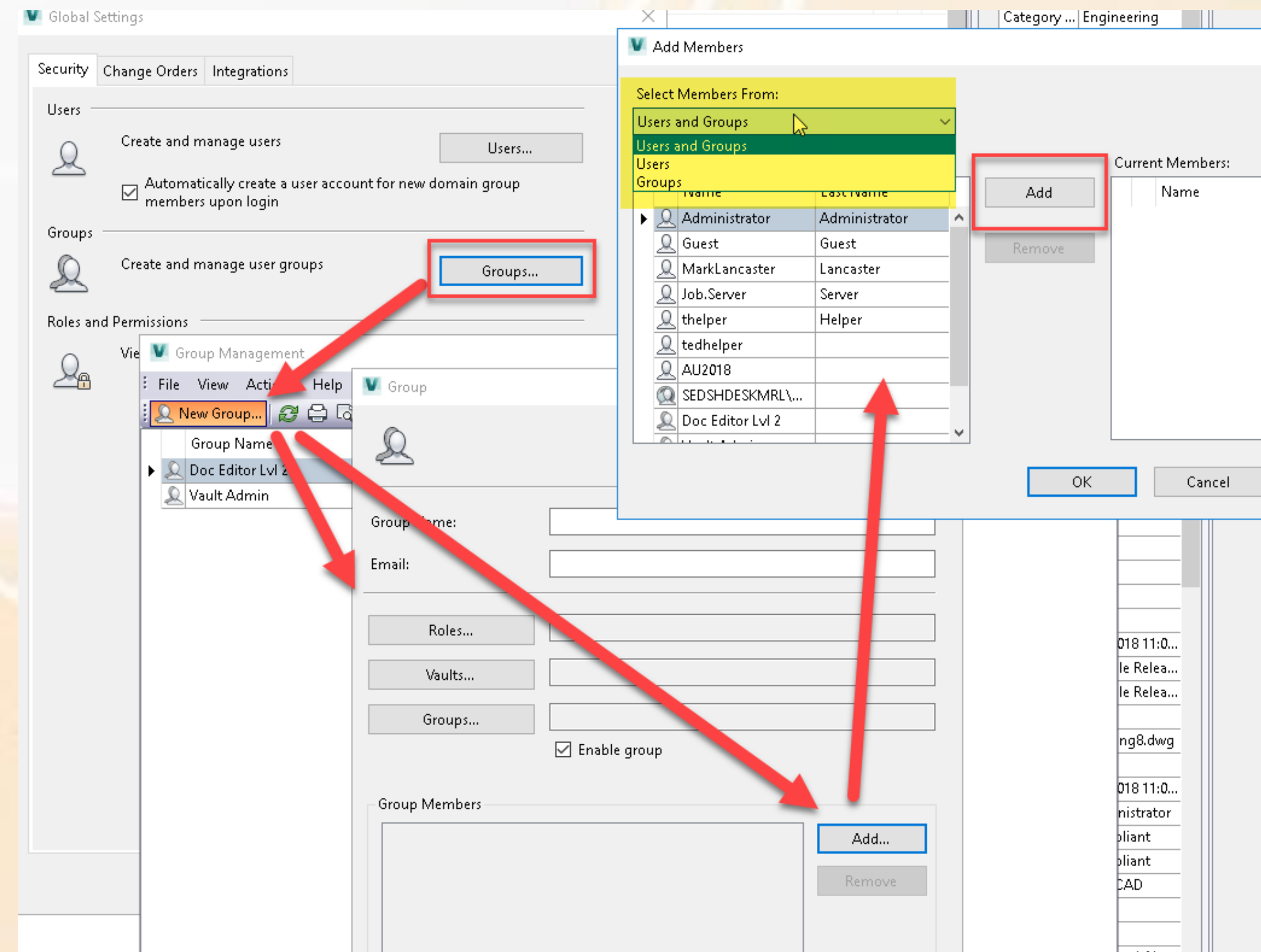
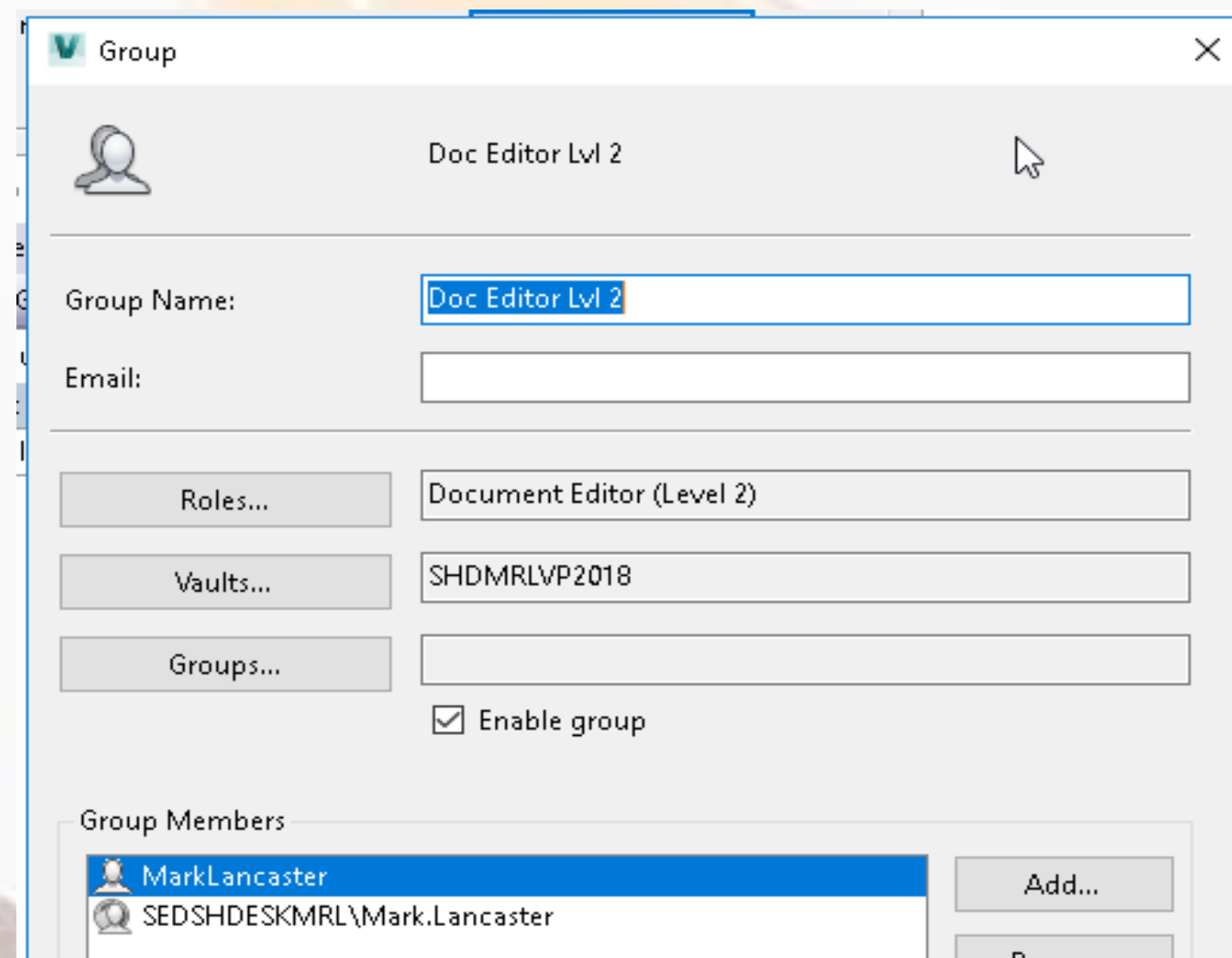
# Vault Groups

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



# Vault Group - Creation

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



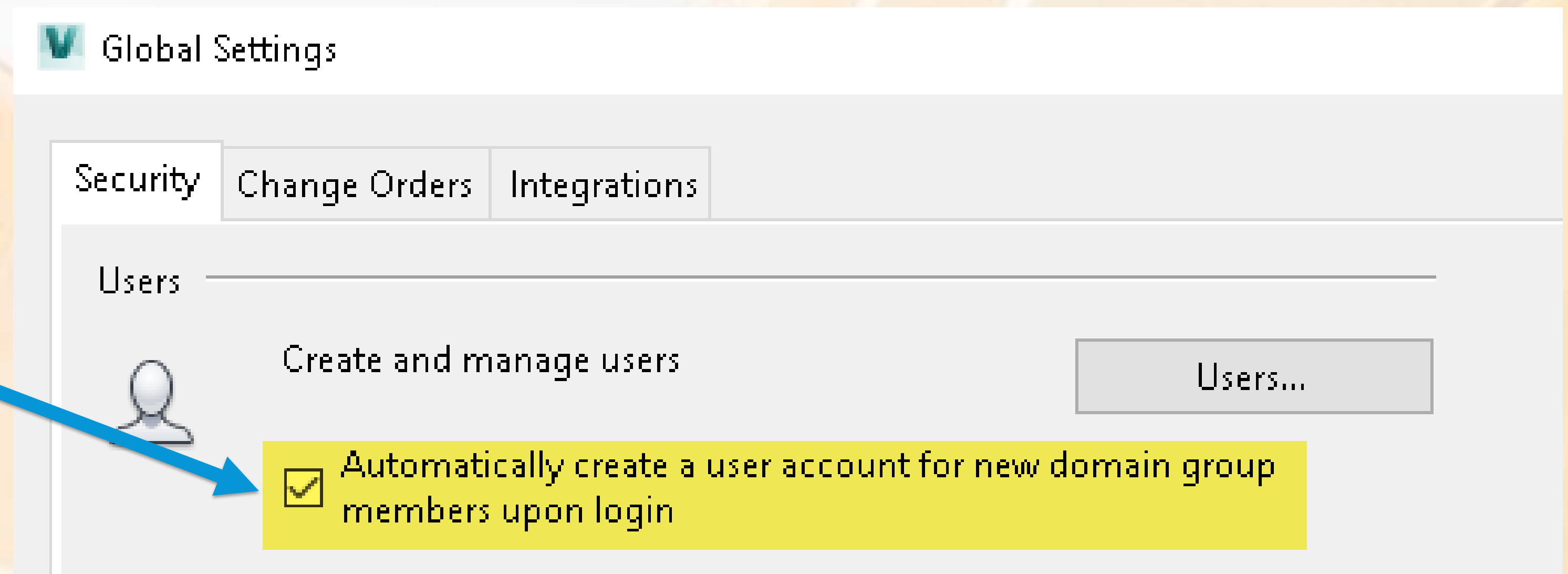


# Vault Group - Creation



# 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





# Mixing Roles, User's, Groups & Access

Roles

Group B



to

ure

ess



Group A





# Vault Permissions

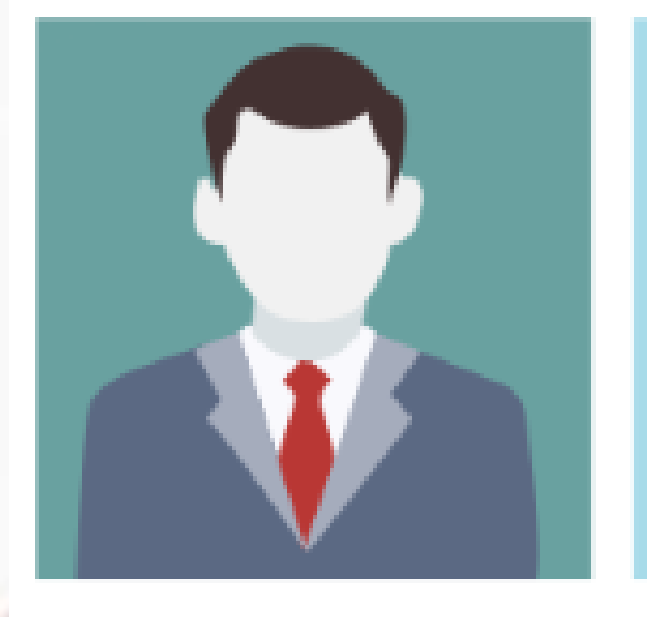
(Vault Workgroup/Pro)



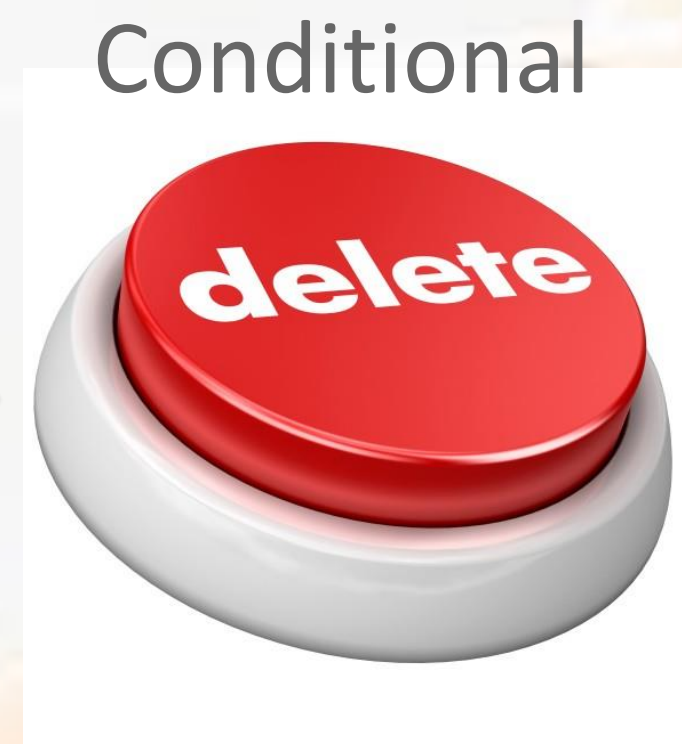
# Permissions – Why its Important!!!



Vault User



Doc Editor  
LVL 2



Access to  
delete files  
across Vault

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

## VAULT BASIC ONLY



# Permissions – Why its Important!!!



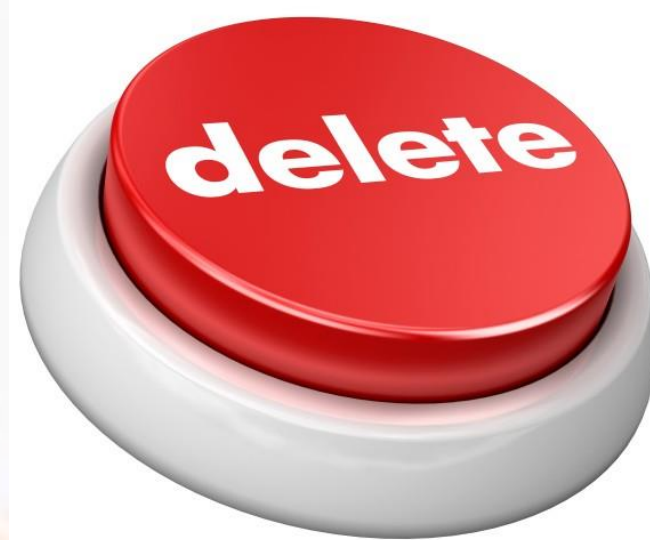
Vault User



Doc Editor  
LVL 2



Conditional



Access to  
delete files  
across Vault



## VAULT WORKGROUP/PRO



# Permissions – 3 Levels



Lifecycle State Permission

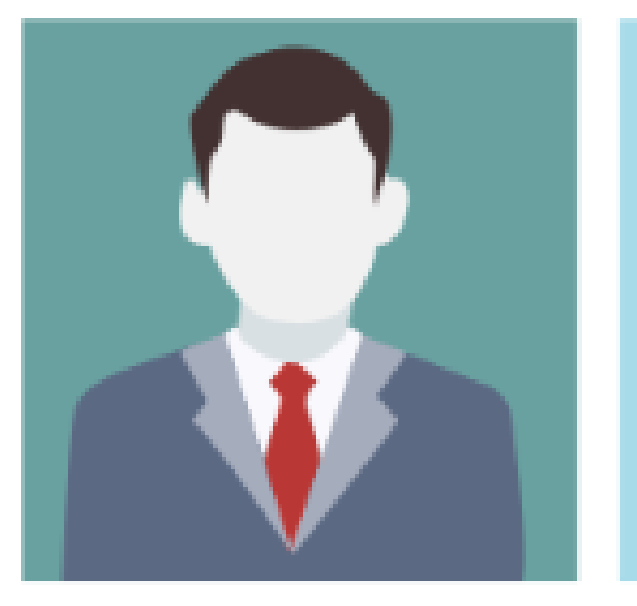
Highest Level of Permission



Access Control List (ACL) Permission

Object Based Security

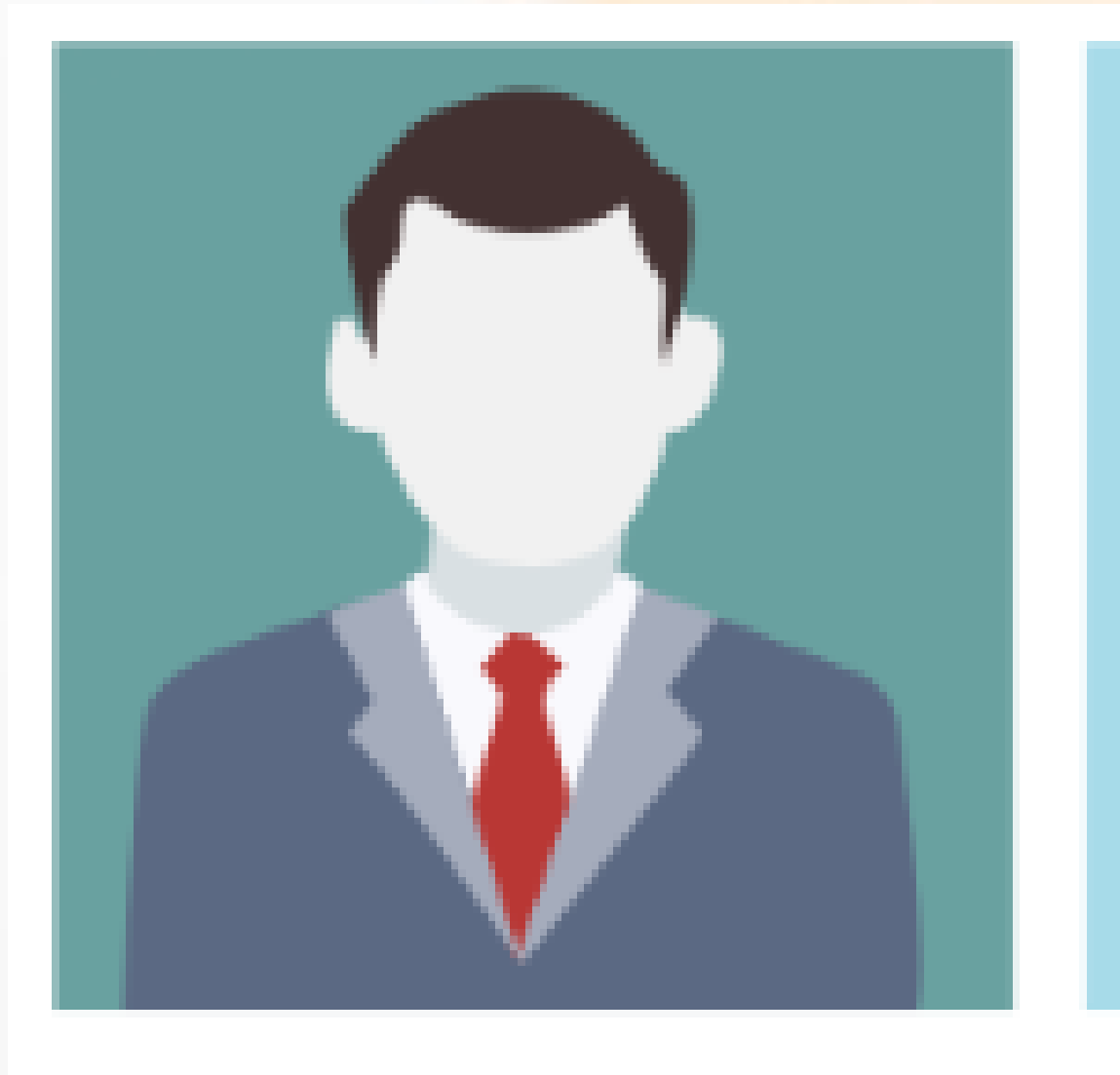
Secondary Level of Permission



Role or Role Based Permission

Lowest Form of Permission

# Permissions – Role Based

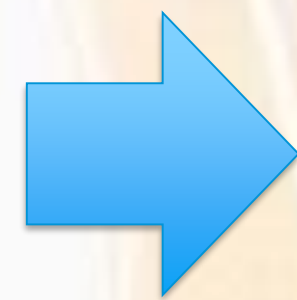


**Provide access (light switch) to perform certain  
functions within Vault**



# Permissions – ACL

VAULT WORKGROUP/PRO



**Control access that's granted by the assigned vault role**

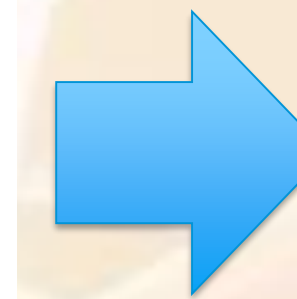
# Permissions – Lifecycle State

VAULT WORKGROUP/PRO



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

**Permission**



**In Review**



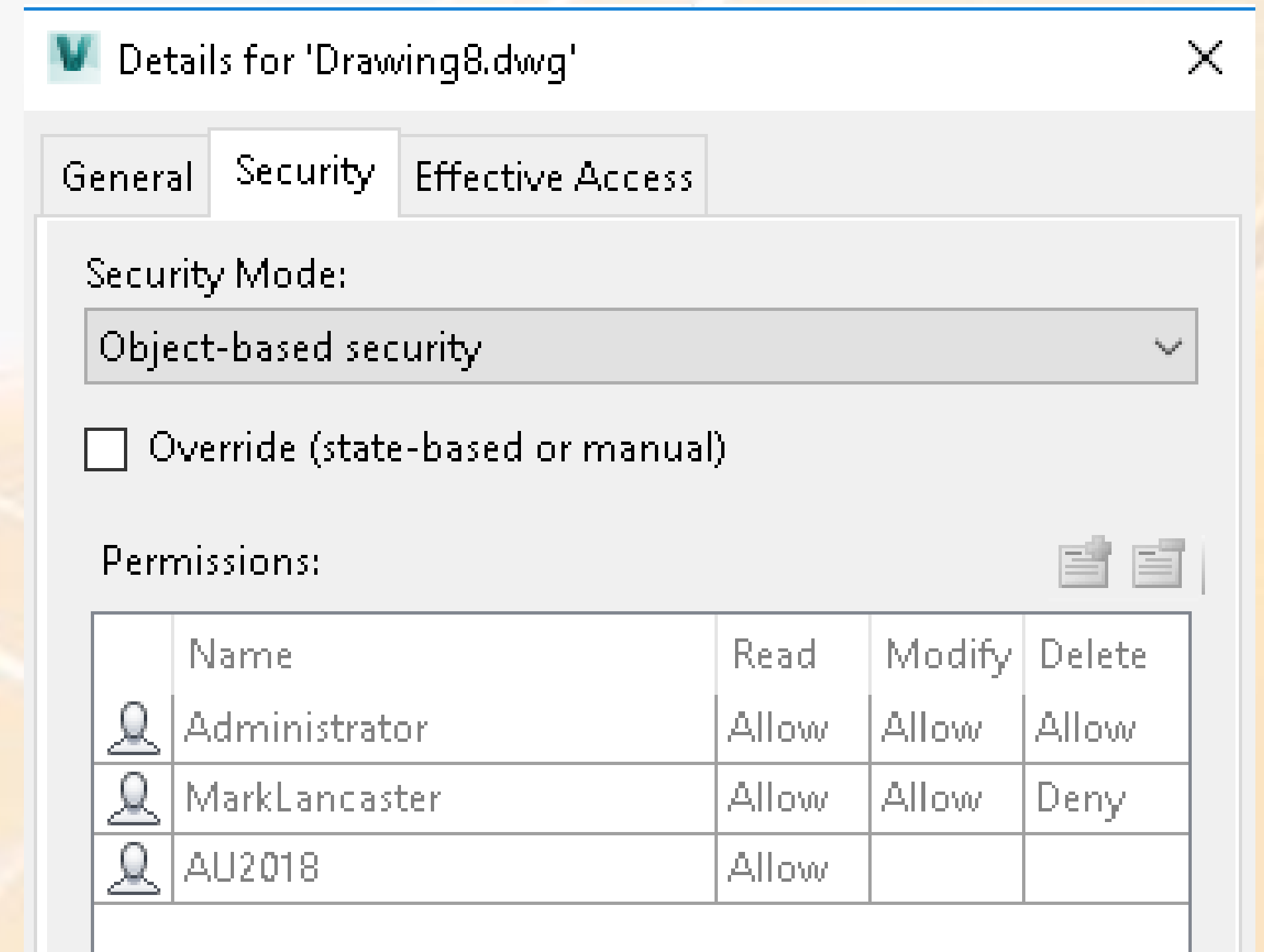
# Permissions – Access Control List

(Vault Workgroup/Pro)

# 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






Details for 'Drawing8.dwg' X

General Security Effective Access

Security Mode:  
Object-based security ▼

☐ Override (state-based or manual)

Permissions:

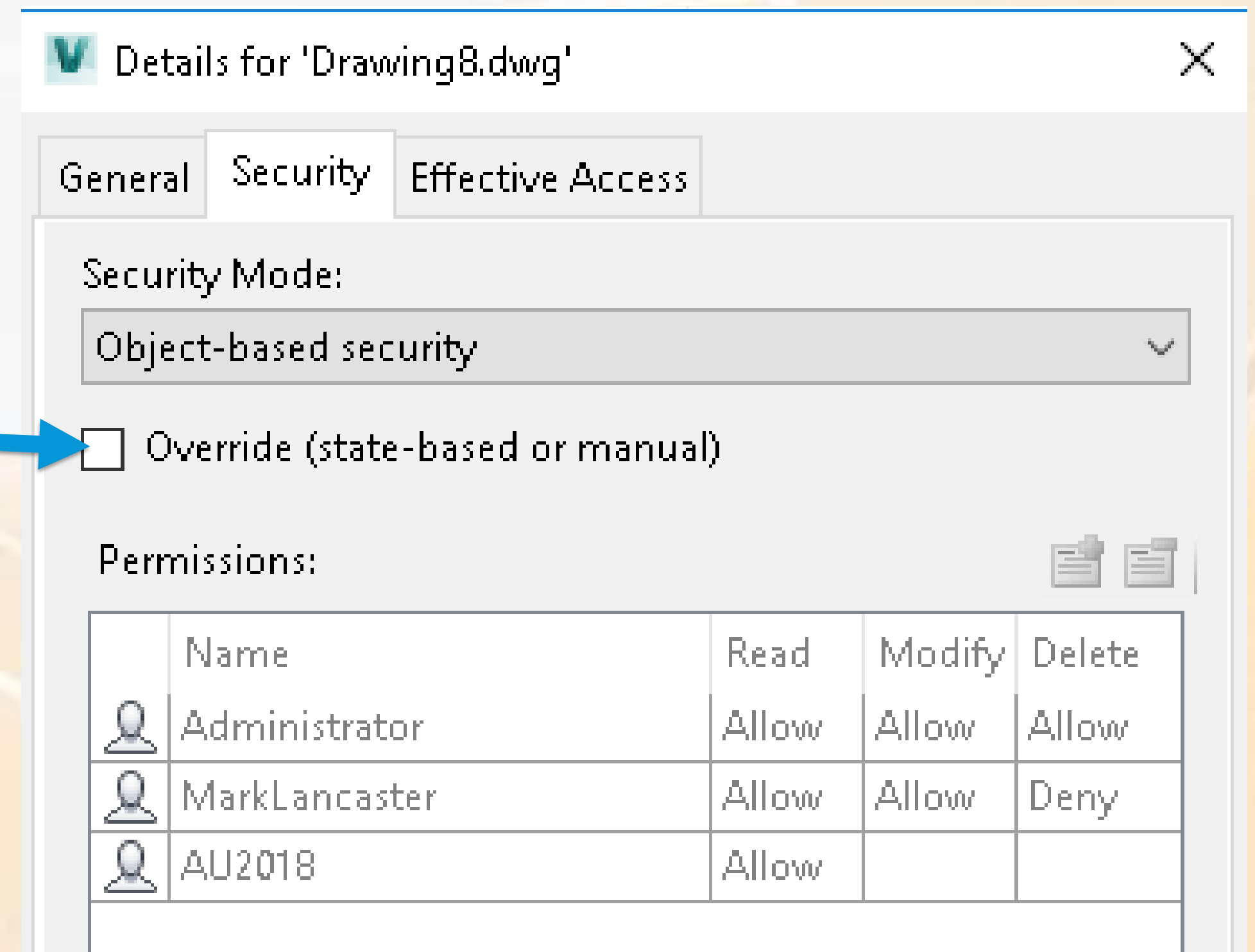
	Name	Read	Modify	Delete
	Administrator	Allow	Allow	Allow
	MarkLancaster	Allow	Allow	Deny
	AU2018	Allow		



# 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



# 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**



# ACL Permission



# Vault Permissions

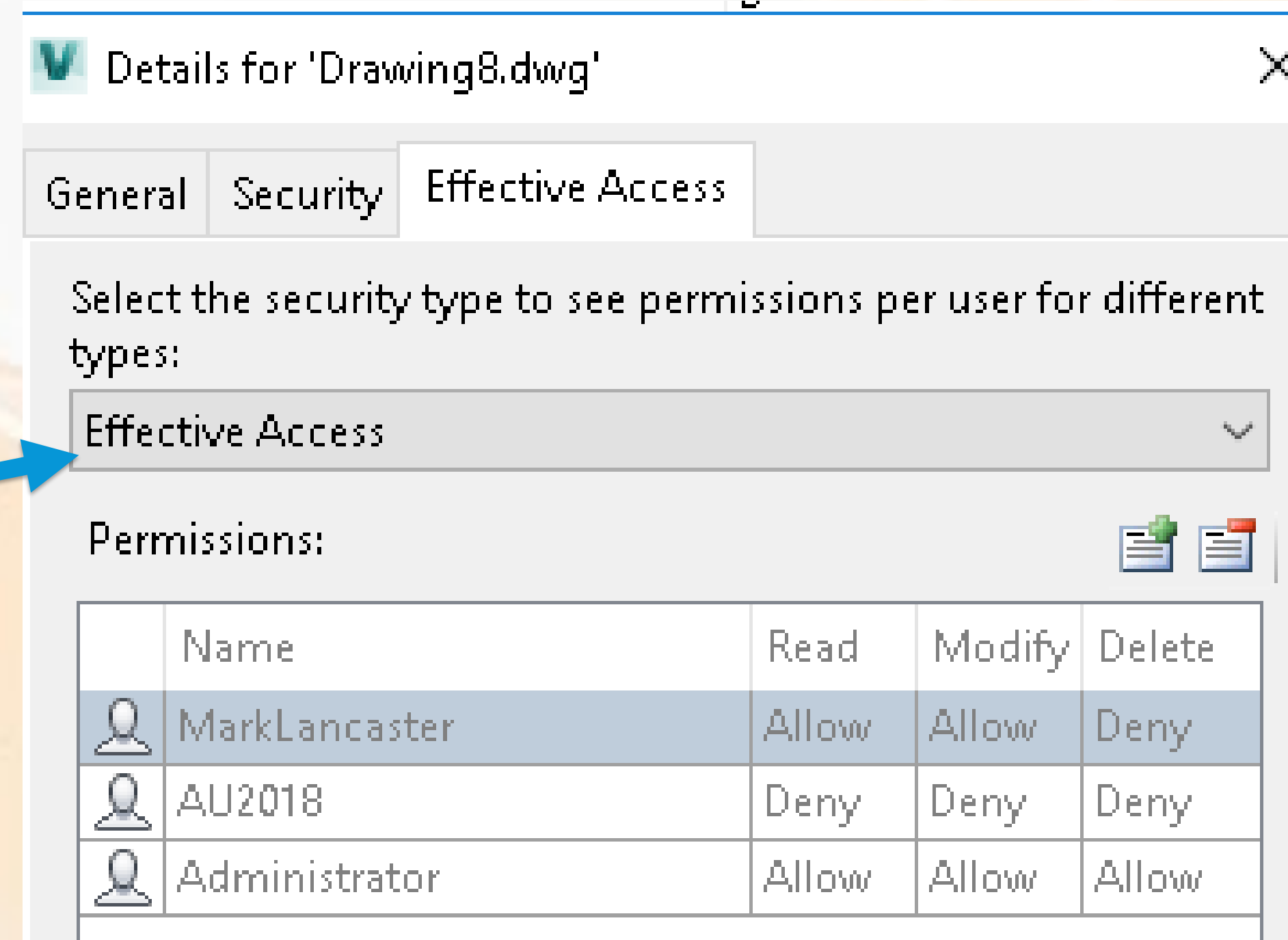




# Permissions – Effective Access

VAULT WORKGROUP/PRO

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



The screenshot shows a dialog box titled 'Details for 'Drawing8.dwg''. It has three tabs: 'General', 'Security', and 'Effective Access'. The 'Effective Access' tab is selected. Below the tabs, there is a text prompt 'Select the security type to see permissions per user for different types:' followed by a dropdown menu showing 'Effective Access'. Below this, there is a section titled 'Permissions:' with a table of permissions for three users: MarkLancaster, AU2018, and Administrator. The table has columns for Name, Read, Modify, and Delete. A blue arrow points from the 'Obj Based, State, Effective' bullet point in the list to the 'Effective Access' dropdown menu.

Name	Read	Modify	Delete
MarkLancaster	Allow	Allow	Deny
AU2018	Deny	Deny	Deny
Administrator	Allow	Allow	Allow

# ACL Permission – Effective Access





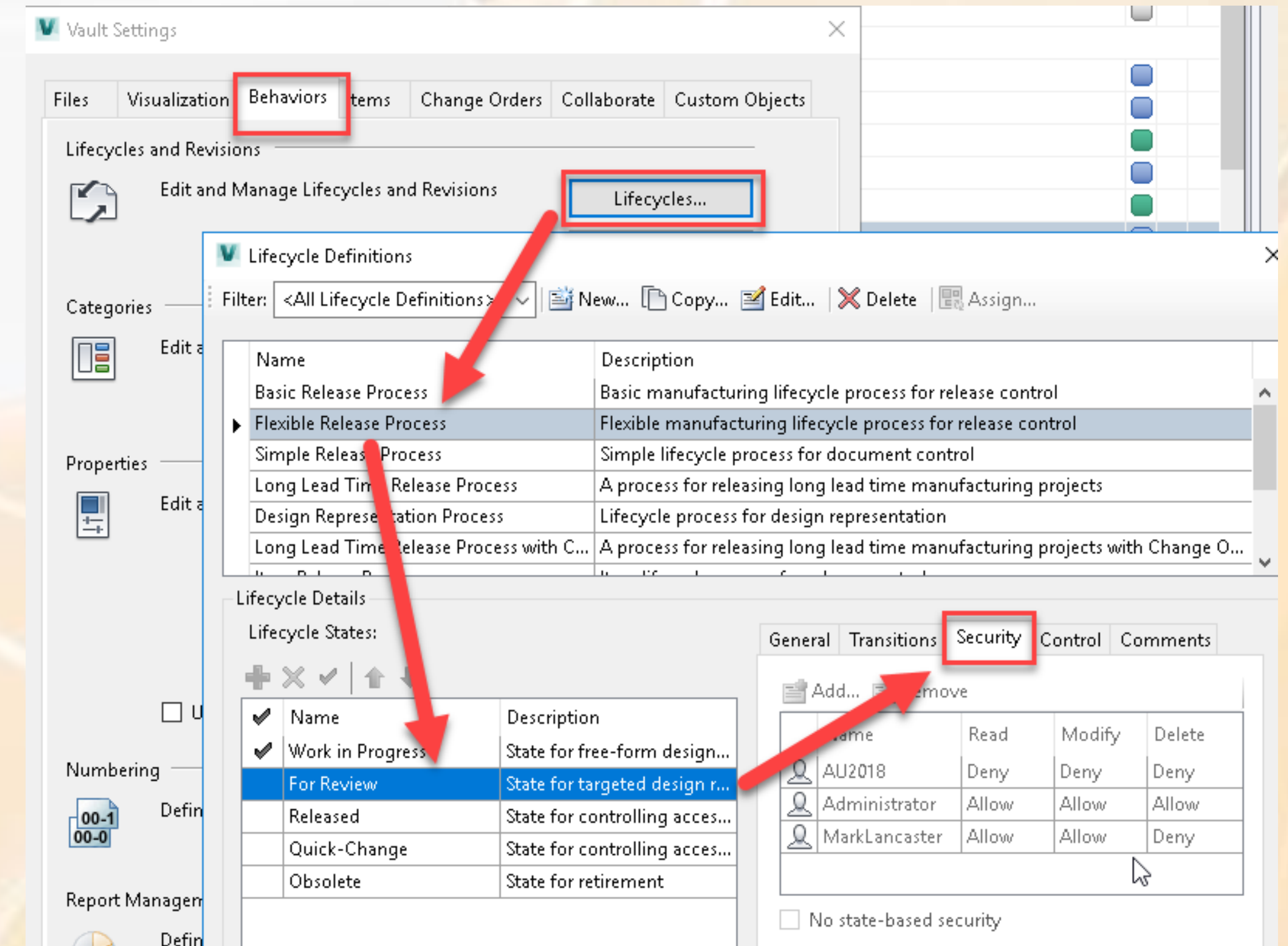
# Permissions – Lifecycle State

(Vault Workgroup/Pro)

# Lifecycle State Permissions

VAULT WORKGROUP/PRO

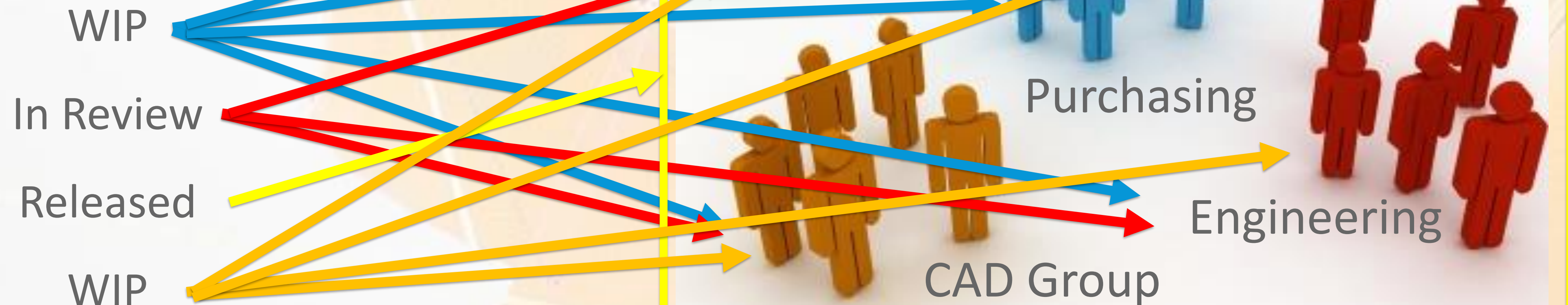
- Optional
- Vault Client
- Tools/Admn/Vault/Behaviors/Lifecycle
- Vault Administrator
  - Doc Manager LVL 2
- Why would you use it?





# Lifecycle State Permissions – WHY?

VAULT WORKGROUP/PRO



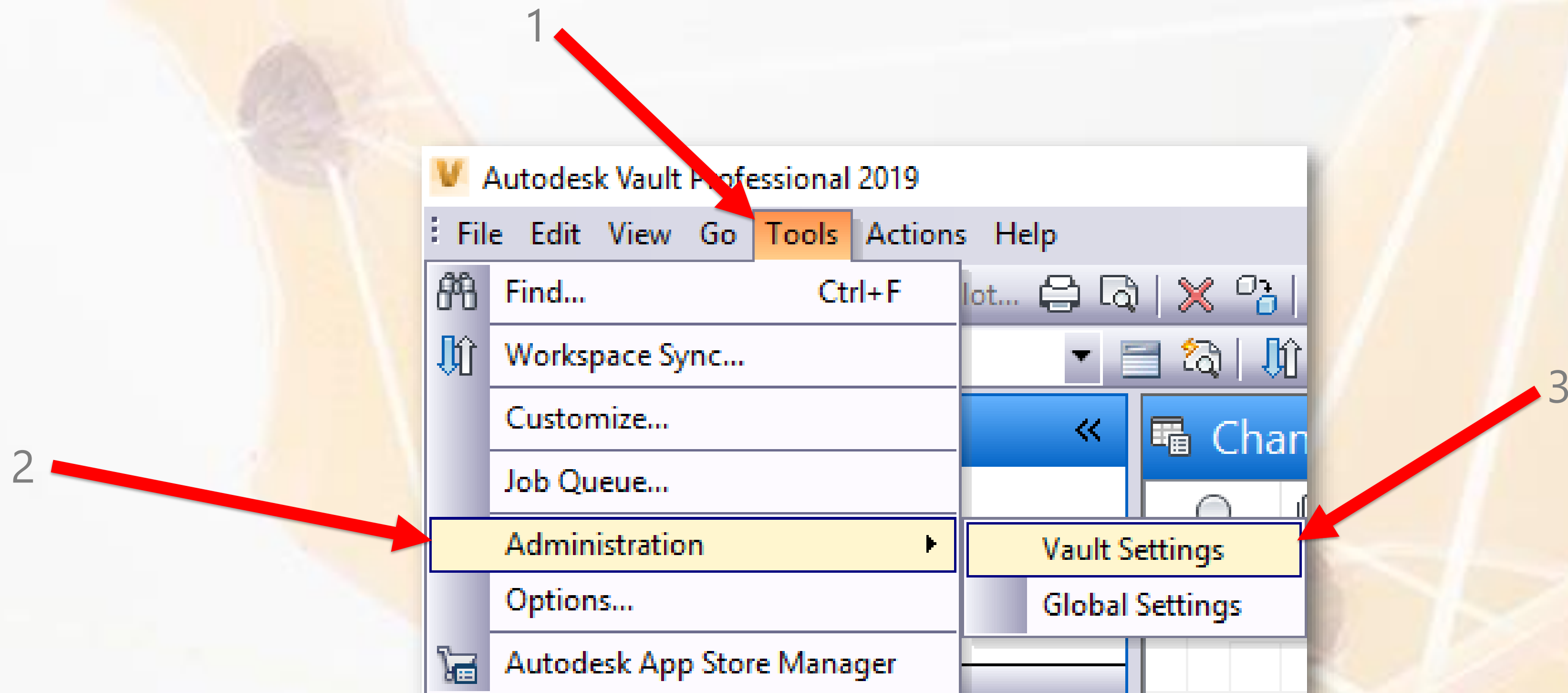


# Vault Settings

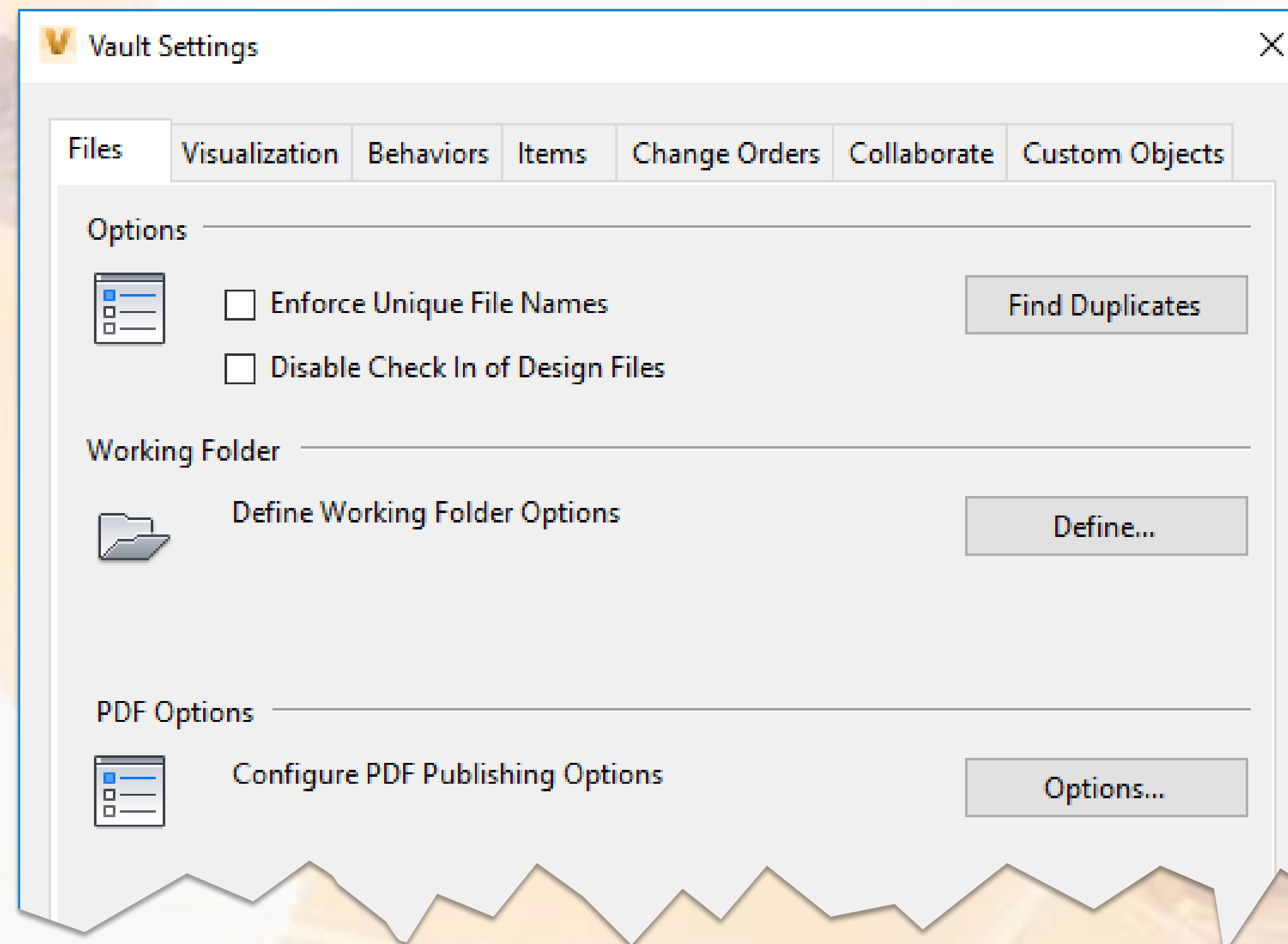




# Memorize This...



# Vault Settings Main Dialog





# Vault Settings – Files Tab

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

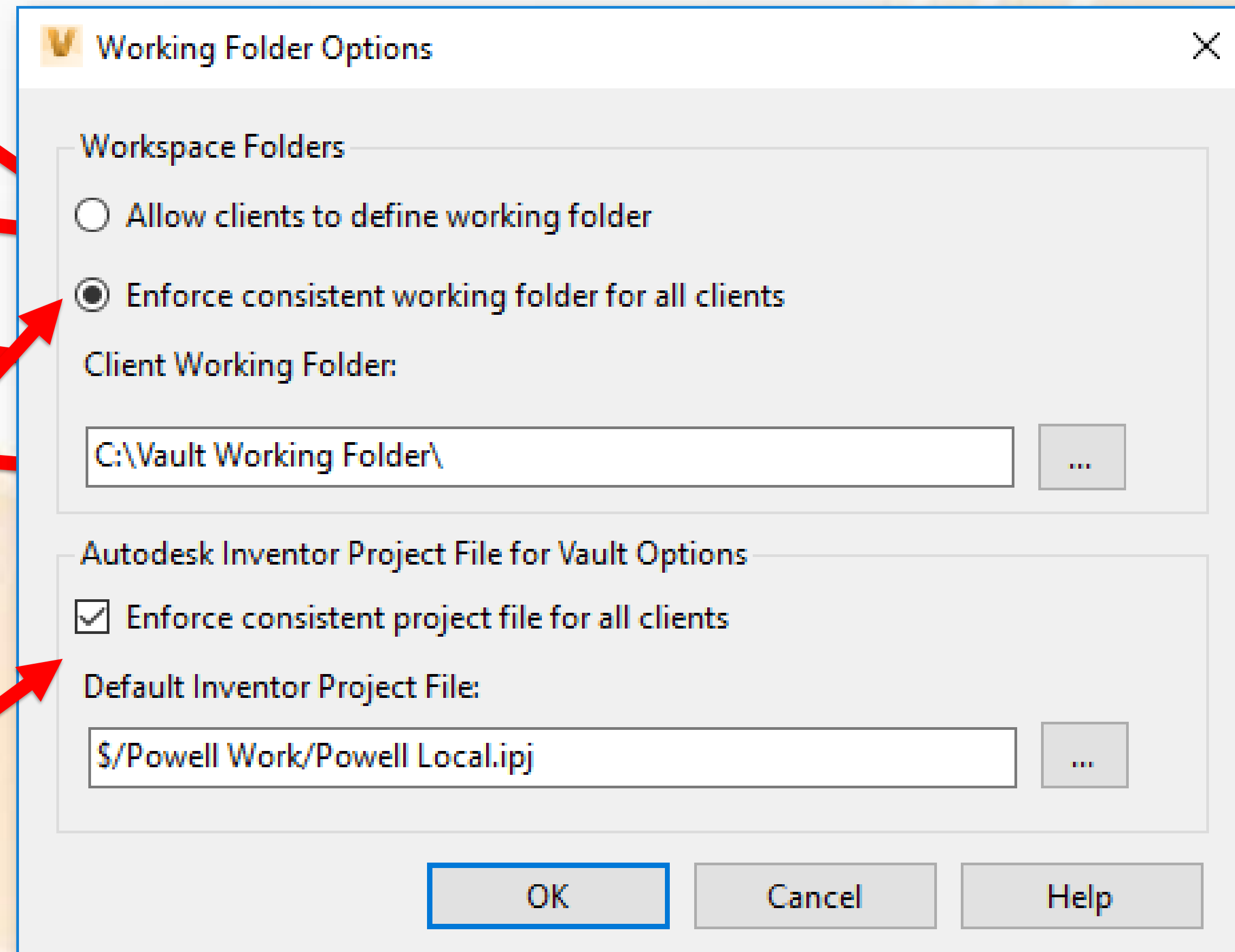
Use this first...

**Vault Basis Publishing Options will be covered with Visualizations..**

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.



**Working Folder Options**

Workspace Folders

☐ Allow clients to define working folder

☒ Enforce consistent working folder for all clients

Client Working Folder:

C:\Vault Working Folder\

Autodesk Inventor Project File for Vault Options

☒ Enforce consistent project file for all clients

Default Inventor Project File:

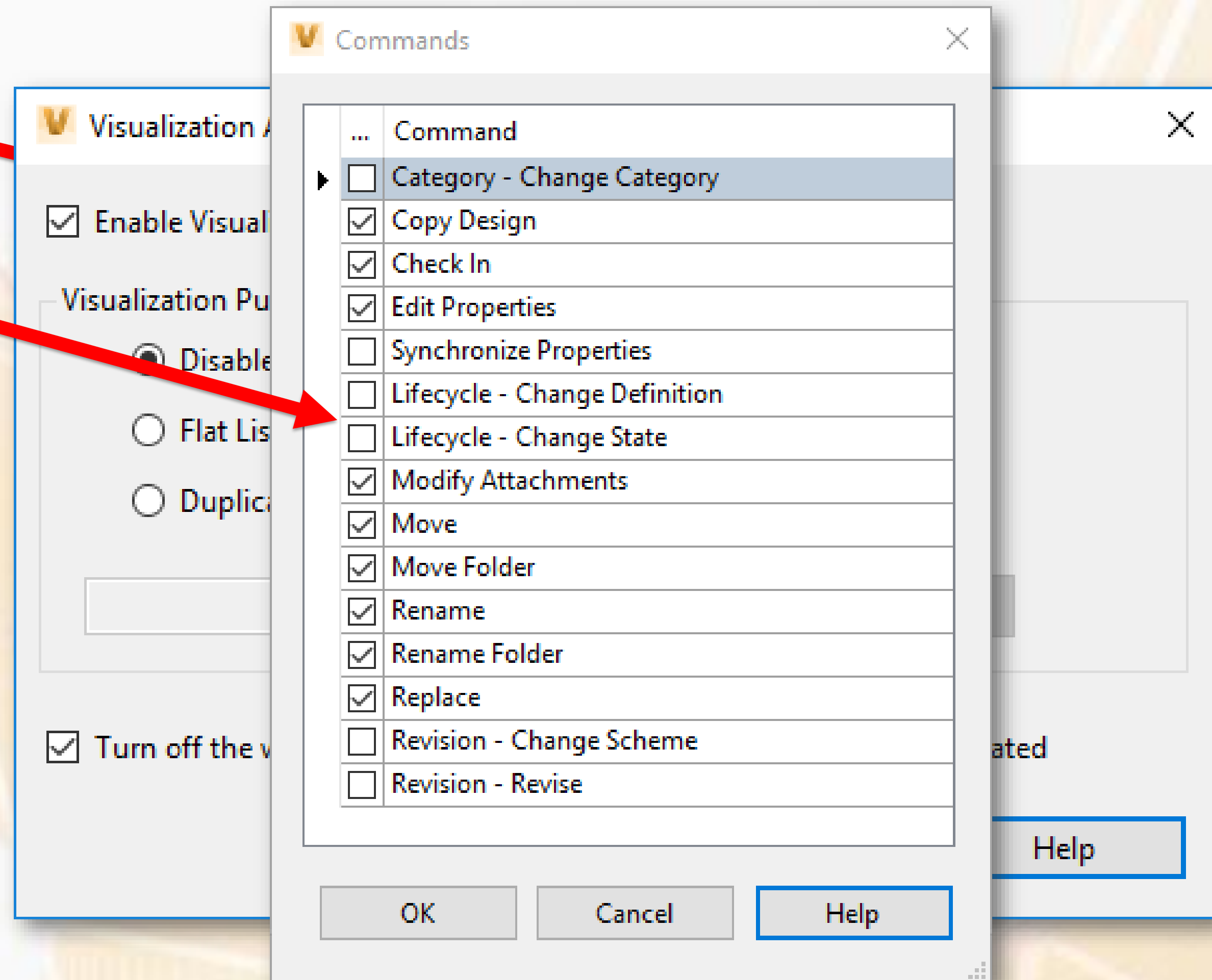
\$/Powell Work/Powell Local.ipj

OK Cancel Help

# Vault Settings – Visualizations Tab

Start here to define options for  
Visualization Attachments.

Define Tasks that break the  
link to a Visualization..





# Vault Visual

Set Op

Autodesk Vault Professional 2019

Chris Benner

File Edit View Go Tools Actions Help

New Report... Plot... Go to: Enter a change order ... Find... Share View Download from Cloud Drive

Filtered

Change Order List

Change Order List

My Search Folders

My Worklist

DDR-000773 (2/15/2017)

DDR-000809 (5/9/2017)

DDR-000856 (8/18/2017)

DDR-000918 (10/30/2017)

ECO-002409 (3/15/2018)

DDR-001002 (5/15/2018)

ECO-002524 (6/8/2018)

DDR-001014 (6/15/2018)

DDR-001043 (7/25/2018)

DDR-001047 (7/30/2018)

DDR-001052 (7/30/2018)

DDR-001053 (7/30/2018)

DDR-001055 (8/3/2018)

DDR-001046 (8/3/2018)

ECO-002610 (8/8/2018)

DDR-001059 (8/13/2018)

ECO-002615 (8/14/2018)

DDR-001070 (8/15/2018)

ECO-002624 (8/16/2018)

DDR-001060 (8/16/2018)

ECO-002641 (8/24/2018)

DDR-001071 (8/27/2018)

My Shortcuts

Add new group

Home

Project Explorer

Item Master

Change Order List

Vault Settings

Files Visualization Behaviors Items Change Orders Collaborate Custom Objects

Visualization Attachments

Define visualization attachment options. Define...

Visualization Management

Remove link to visualization files during specified commands. Commands...

Publish Options

Configure visualization file publishing options. Options...

Close

Help

Revision...

Search Help

Search Change Order List

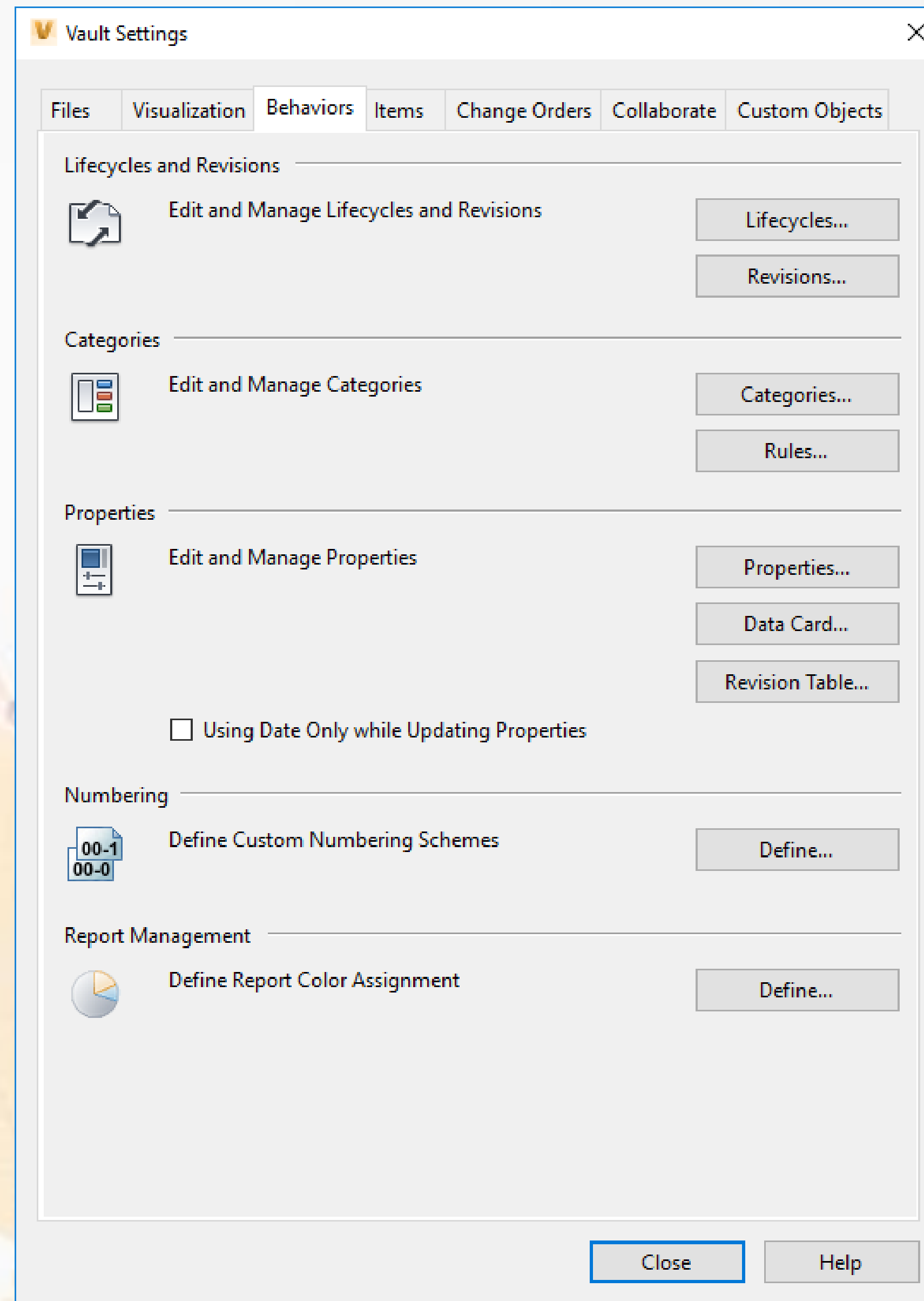
Date Created Due Date Date Modified

39 Change Orders (0 selected)

vault powell POWELLFAB\cbenner

# Vault Settings – Behaviors Tab

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



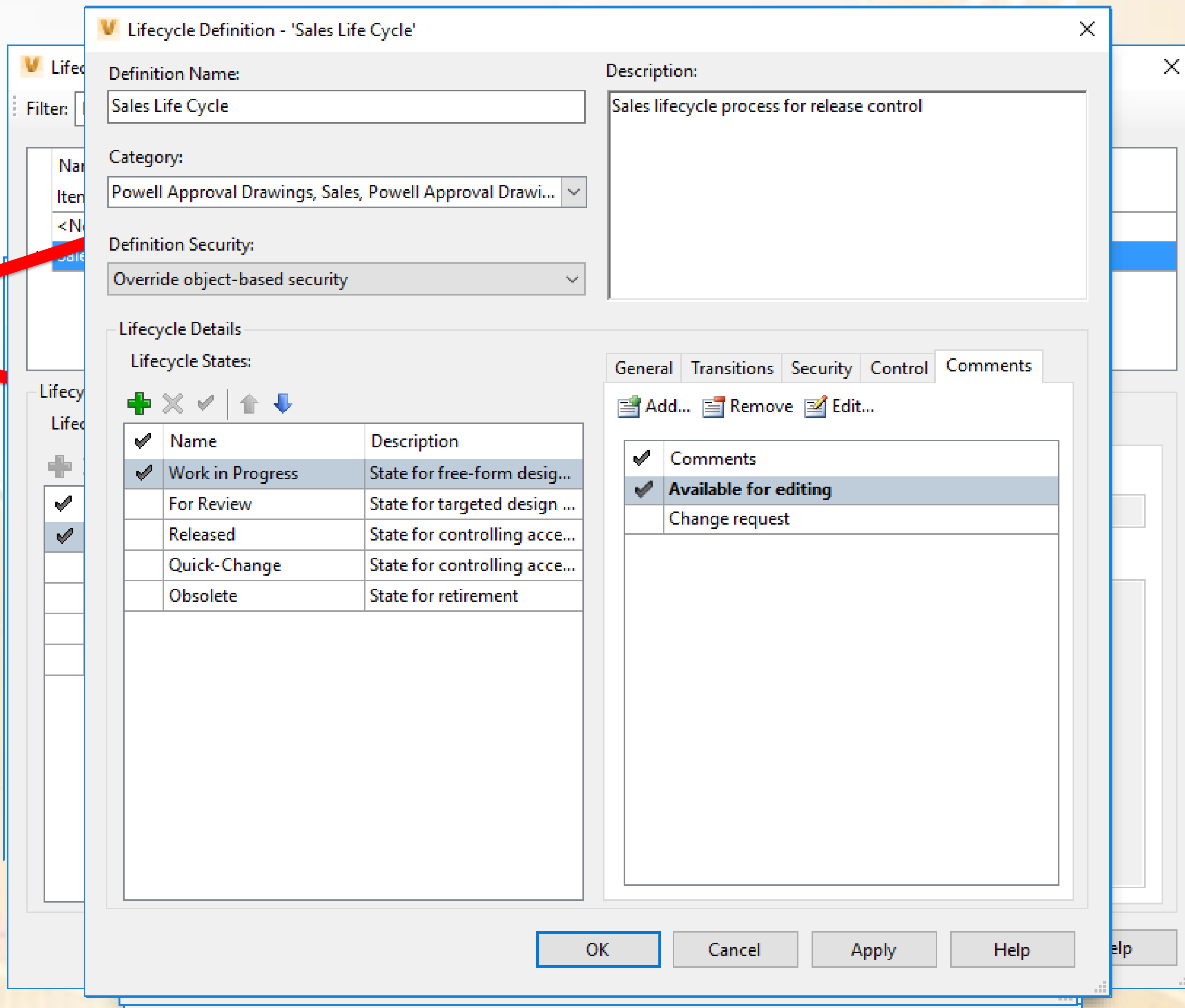
Let's break this one down....



# Vault Settings – Lifecycles

Lifecycle Definitions..

Lifecycle Edit.



**V Lifecycle Definition - 'Sales Life Cycle'**

Definition Name: Sales Life Cycle

Category: Powell Approval Drawings, Sales, Powell Approval Drawi...

Definition Security: Override object-based security

Description: Sales lifecycle process for release control

**Lifecycle Details**

Lifecycle States:

<input checked="" type="checkbox"/>	Name	Description
<input checked="" type="checkbox"/>	Work in Progress	State for free-form design...
<input type="checkbox"/>	For Review	State for targeted design ...
<input type="checkbox"/>	Released	State for controlling acce...
<input type="checkbox"/>	Quick-Change	State for controlling acce...
<input type="checkbox"/>	Obsolete	State for retirement

General Transitions Security Control Comments

Add... Remove Edit...

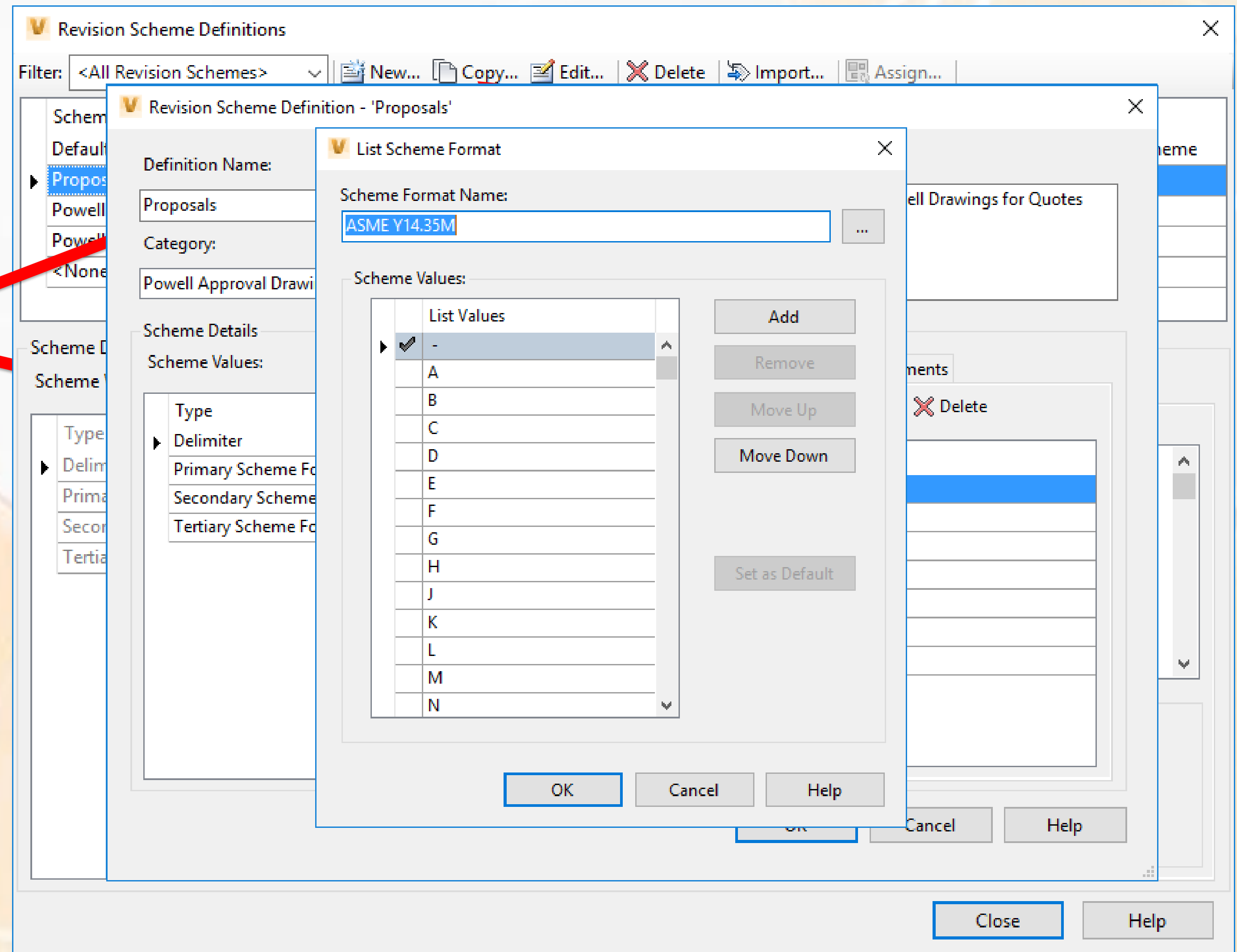
<input checked="" type="checkbox"/>	Comments
<input checked="" type="checkbox"/>	Available for editing
<input type="checkbox"/>	Change request

OK Cancel Apply Help

# Vault Settings – Revisions

Revisions Scheme  
Definitions..

Rev. Scheme Edit.



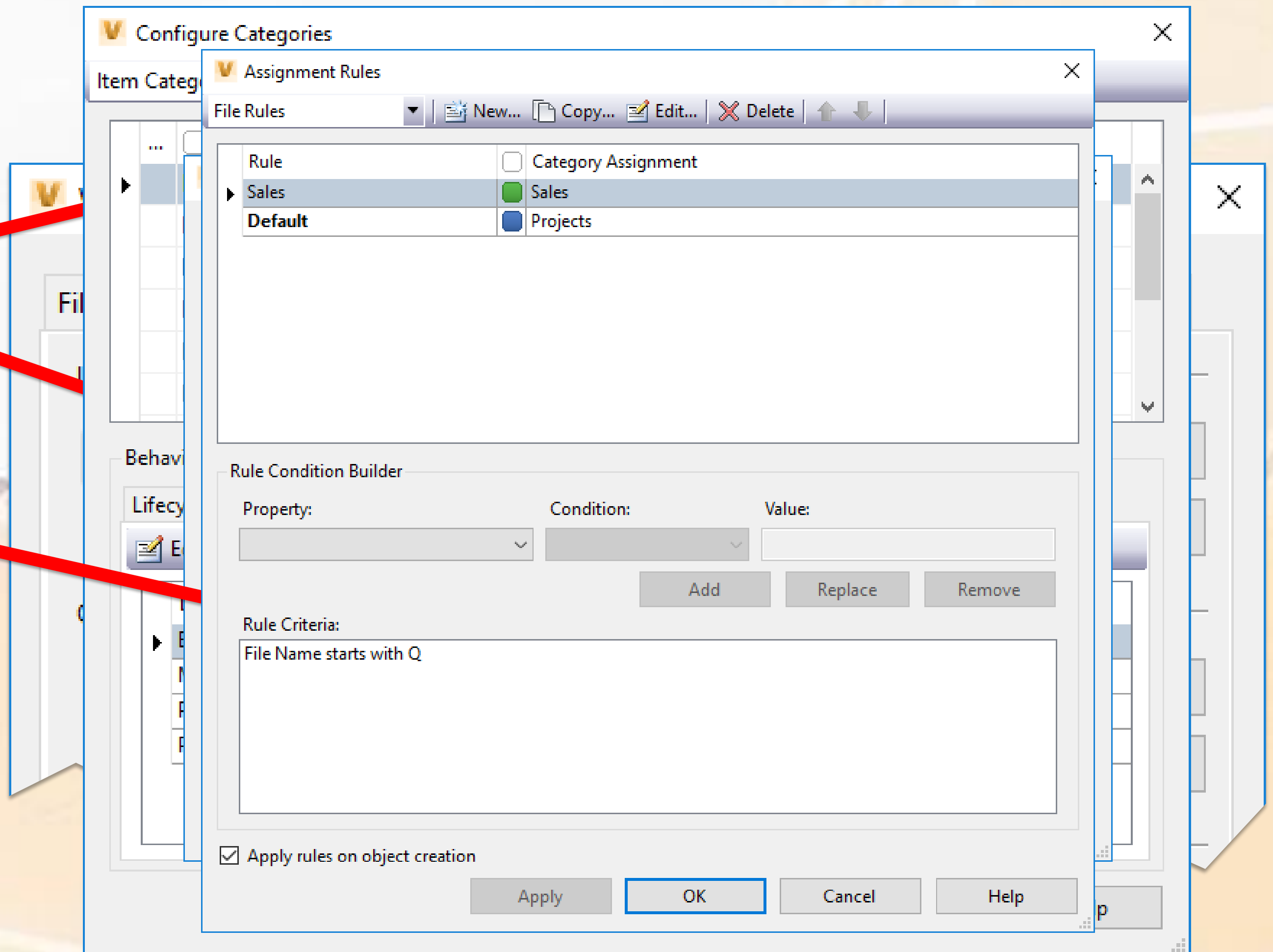


# Vault Settings – Categories

Configure Categories.

Rev. Scheme Edit.

Rules.



# Vault Settings – Properties

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

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

**Property Definitions**

New... Edit... Delete Get Usage Counts

Property Name	Data Type	State	Usage	Associations	Folder Categories	File Categories	Item Categories
Rev. Approved	Text	Enabled		File, Item		Engineering, Office, Standard, Base...	Powell El
Rev. Author	Text	Enabled		File, Item		Engineering, Office, Standard, Base...	Documen
Rev. Date	Date	Enabled		File, Item		Engineering, Office, Standard, Base...	Documen
Rev. Description	Text	Enabled		File, Item		Engineering, Office, Standard, Base...	Documen
Revision	Text	Enabled		File, Item			
Revision Level	Text	Enabled		File, Item		Powell Approval Drawings, PlantPr...	
Revision Scheme	Text	Enabled		File, Item			
Revision Scheme (Historical)	Text	Enabled		File, Item			
Share Path	Text	Enabled		Folder			
State	Text	Enabled		Folder, File, Item, Change Order, C...			
State (Historical)	Text	Enabled		File, Item			
State(Location)	Text	Enabled		File, Item		Engineering, Base, PlantProjectFile	
Stock Number	Text	Enabled		File		Standard, Manufactured Parts	
Sub-Category	Text	Enabled		File, Item		Engineering, Office, Standard, Base...	Documen
Subject	Text	Enabled		File		Engineering, Office, Standard, Base...	
Submitted By	Text	Enabled		Change Order			
Syspro Job #	Text	Enabled		File, Item, Reference Designator		Engineering, Base, Electrical, Powel...	
Tag	Text	Enabled		Reference Designator			
Test	Text	Enabled		File, Item			

Settings Mapping

Property values:

Name	Value
State	Enabled
Basic Search	Searched
Initial Value	
List Values	'APPROVED FOR CONSTRUCTION', 'AS BUILT', 'AS I...
Enforce List Of Values	False
Requires Value	False
Case Sensitivity	None
Minimum Length	
Maximum Length	

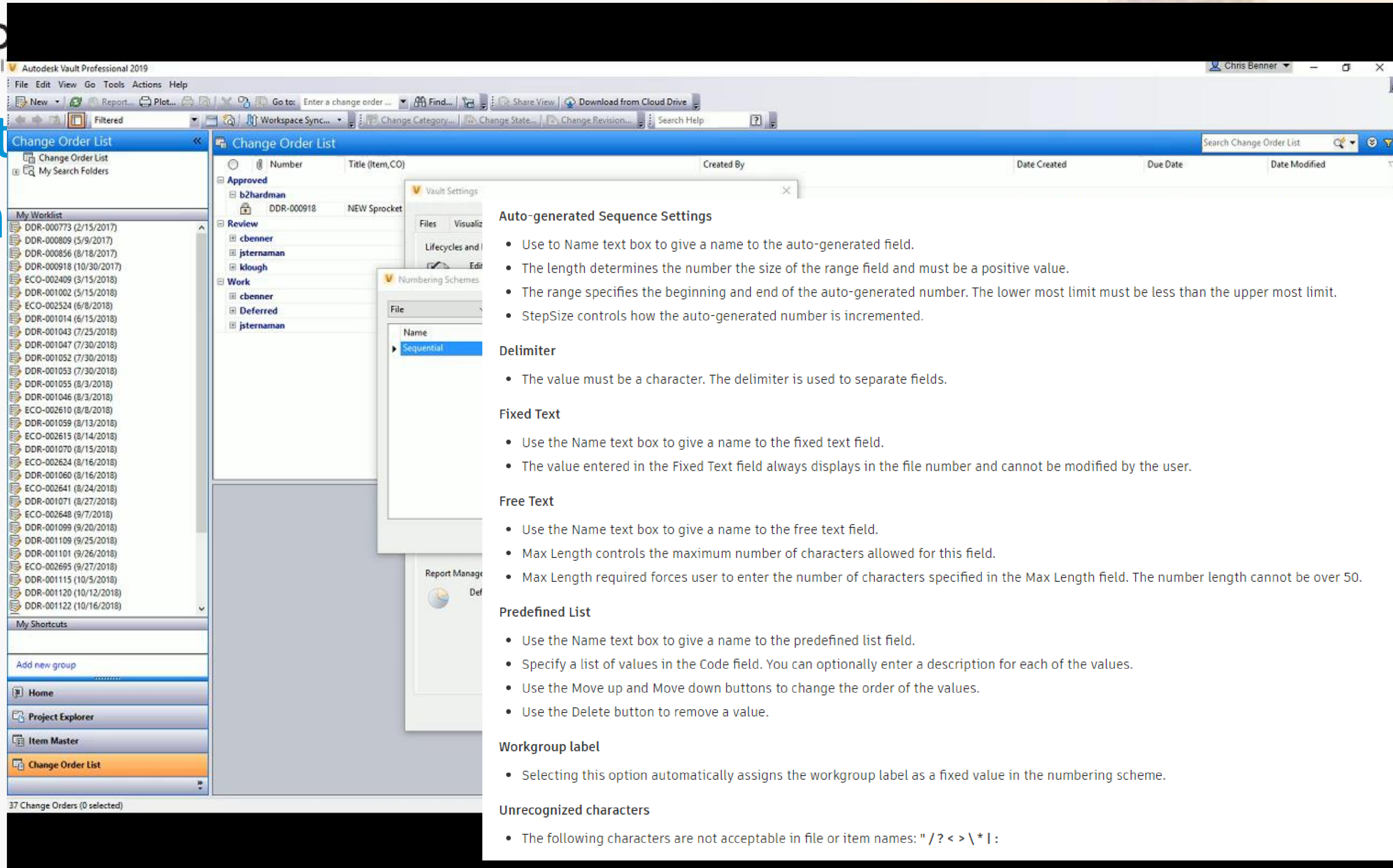
Category values:

Name	Value	Override
File:Base		
Enforce List Of Values	False	
Requires Value	False	
Case Sensitivity	None	
Minimum Length		
Maximum Length		
File:Electrical		
Enforce List Of Values	False	
Requires Value	False	
Case Sensitivity	None	
Minimum Length		
Maximum Length		
File:Engineering		
Enforce List Of Values	False	

Close Help



# Vault Num Sche



The screenshot displays the Autodesk Vault Professional 2019 interface. The main window shows the 'Change Order List' with a table of change orders. The left sidebar contains a 'My Worklist' and 'My Shortcuts' section. The bottom status bar indicates '37 Change Orders (0 selected)'. Overlaid on the main window is the 'Numbering Schemes' dialog box, which is used for configuring auto-generated sequence settings.

**Change Order List**

Number	Title (Item, CO)	Created By	Date Created	Due Date	Date Modified
Approved					
b2hardman					
DDR-000918	NEW Sprocket				
Review					
cbenner					
jssternaman					
klough					
Work					
cbenner					
Deferred					
jssternaman					

**Numbering Schemes**

File

Name

Sequential

**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**

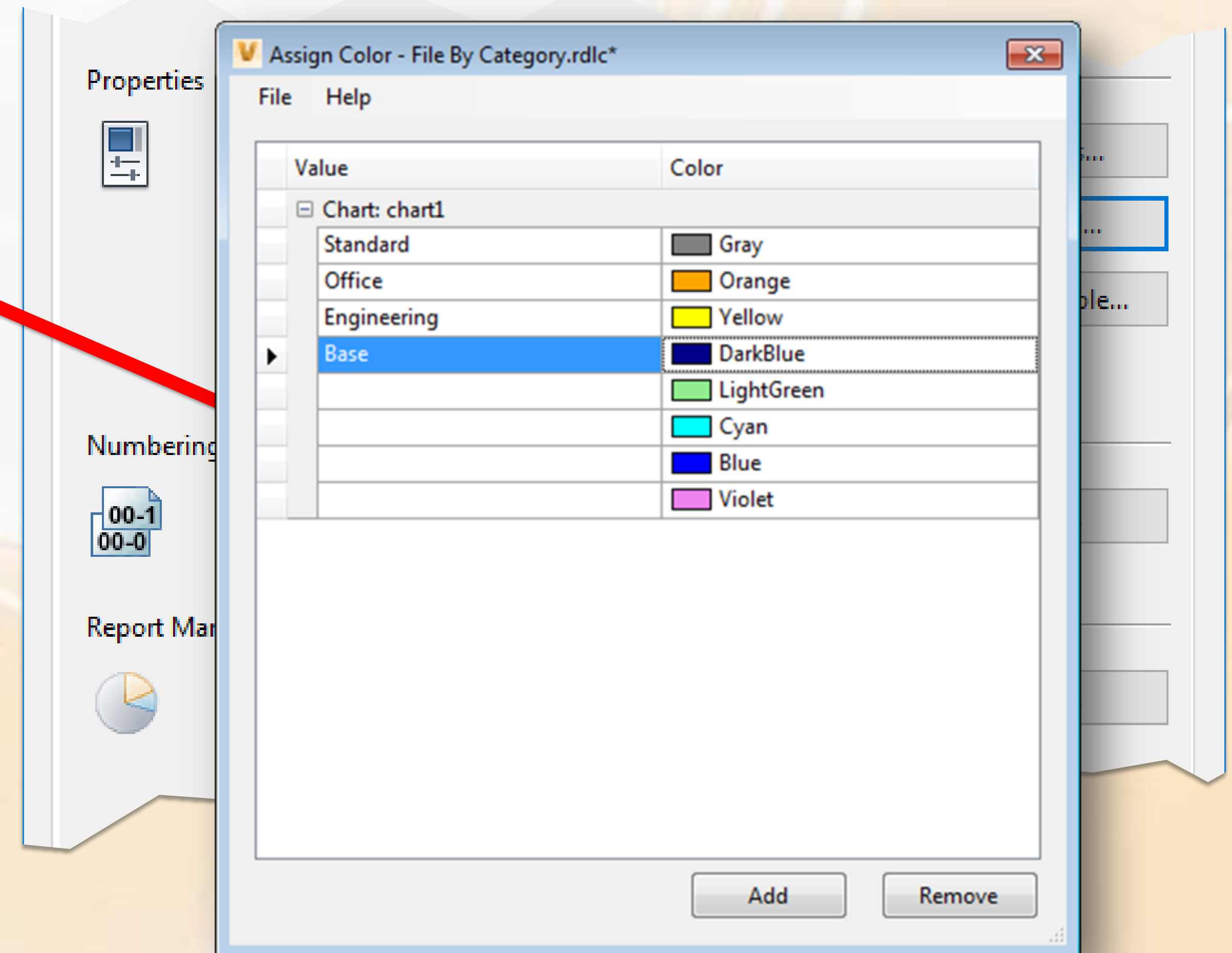
- The following characters are not acceptable in file or item names: " / ? < > \ \* | :

# Vault Settings – Report Color Assignment

Define Report Color  
Assignment

Available after a report is run.

Feature of Inventor Add in  
Vault Workgroup & Pro only





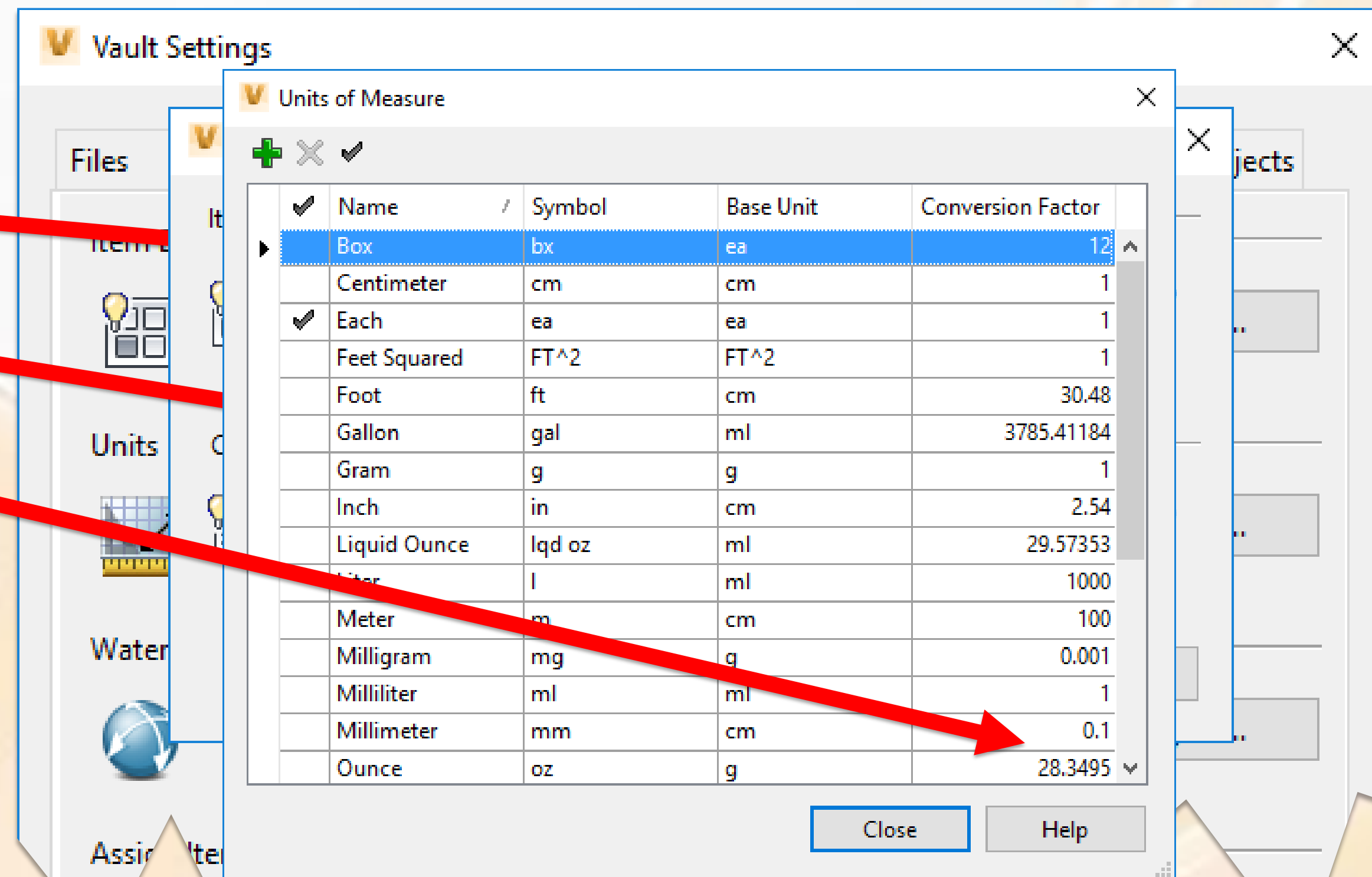
# Vault Settings – Items Tab

Visibility of Item Features


Configure Units

Watermarking

Lifecycle, Property, Custom  
or None



# Vault Settings – Items Tab

 Custom Watermark Settings

Text:

Location:

Diagonal

Font:

Tahoma

Color:

255, 0, 0


Size:

Medium

OK

Cancel

Help

 Property-based Watermark Settings

Property:

State (Historical)

Location:

Border

Font:

Arial

Color:

0, 0, 0

Size:


Small

OK

Cancel

Help

Property Based Watermarks

 Lifecycle Watermarks

Filter:

Item Categories

Name	Description
Item Release Process	Item lifecycle process for release control
<None>	Null lifecycle definition for opt-out scenario
Sales Life Cycle	Sales lifecycle process for release control

Lifecycle State	Watermark Text	Location	Font	Color	Size
Reference Only! - Work In...	Reference Only! - Not ...	Border	Arial		Small
Reference Only! - In Review	Review Copy - Not Appro...	Border	Arial		Small
Approved For Construction	Approved For Construction	Border	Arial		Small
Obsolete - Do Not Use	OBSOLETE	Diagonal	Arial		Medium
Quick-Change	QUICK-CHANGE	Diagonal	Tahoma		Medium

OK

Cancel

Help

Lifecycle Watermarks

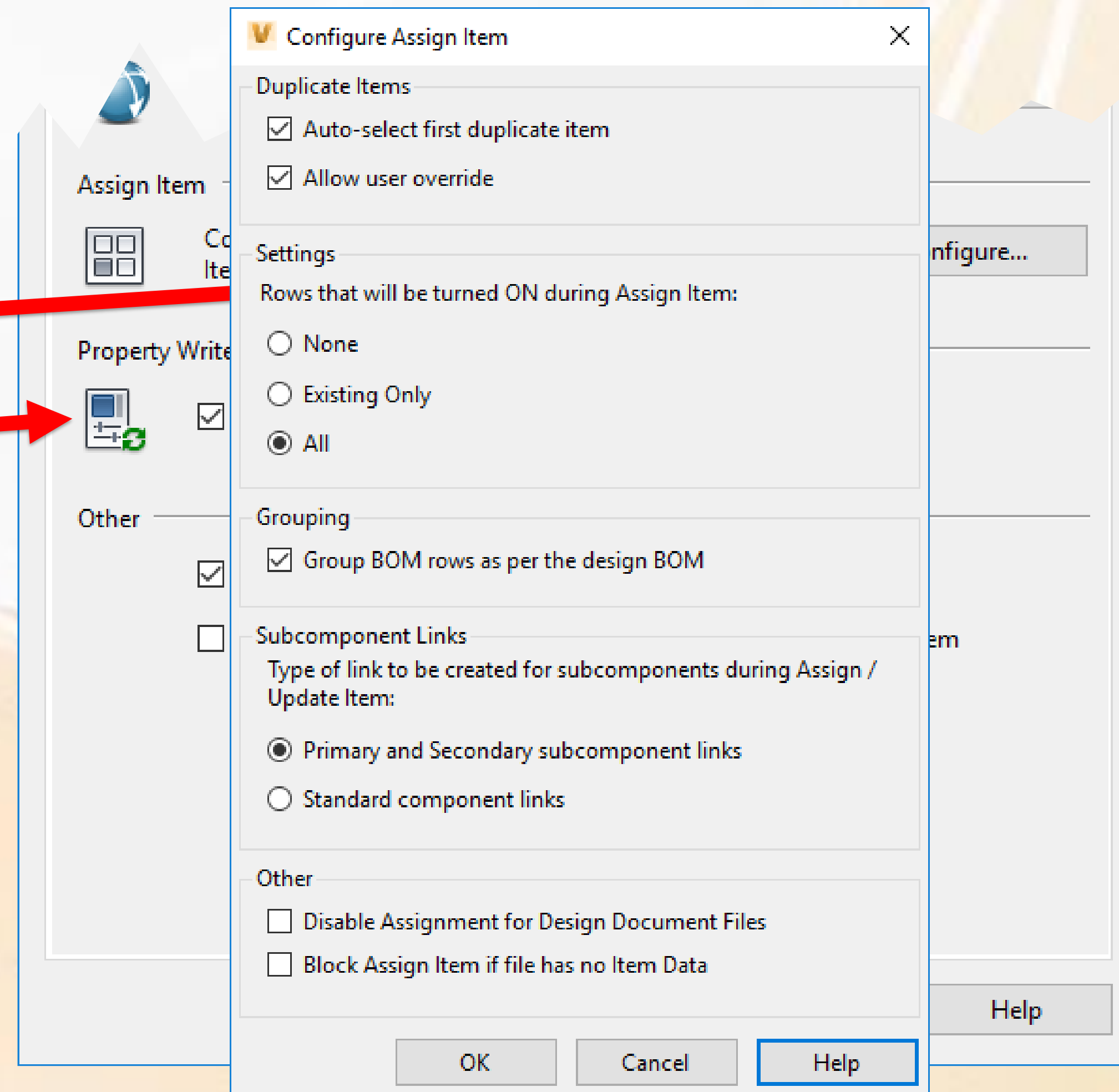
Custom Watermarks



# Vault Settings – Items Tab

BOM Row Settings

Property Write Back



**Configure Assign Item**

**Assign Item**

**Property Write Back**

**Other**

**Duplicate Items**

- ☒ Auto-select first duplicate item
- ☒ Allow user override

**Settings**

Rows that will be turned ON during Assign Item:

- ☐ None
- ☐ Existing Only
- ☒ All

**Grouping**

- ☒ Group BOM rows as per the design BOM

**Subcomponent Links**

Type of link to be created for subcomponents during Assign / Update Item:

- ☒ Primary and Secondary subcomponent links
- ☐ Standard component links

**Other**

- ☐ Disable Assignment for Design Document Files
- ☐ Block Assign Item if file has no Item Data

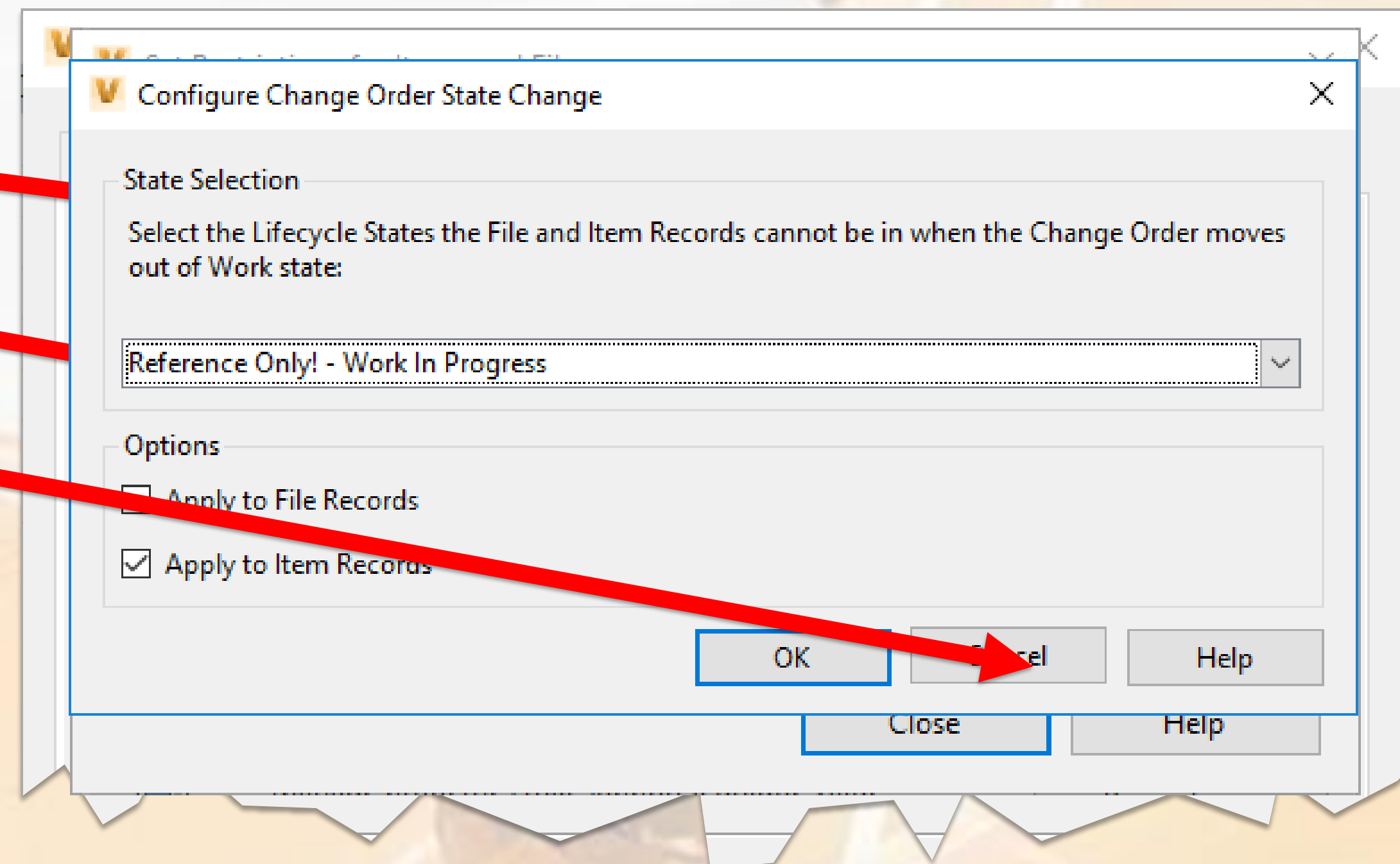
OK Cancel Help

# Vault Settings – Change Orders Tab

Set Change Order Visibility

Restrict State Changes

Change Order Work State  
Change

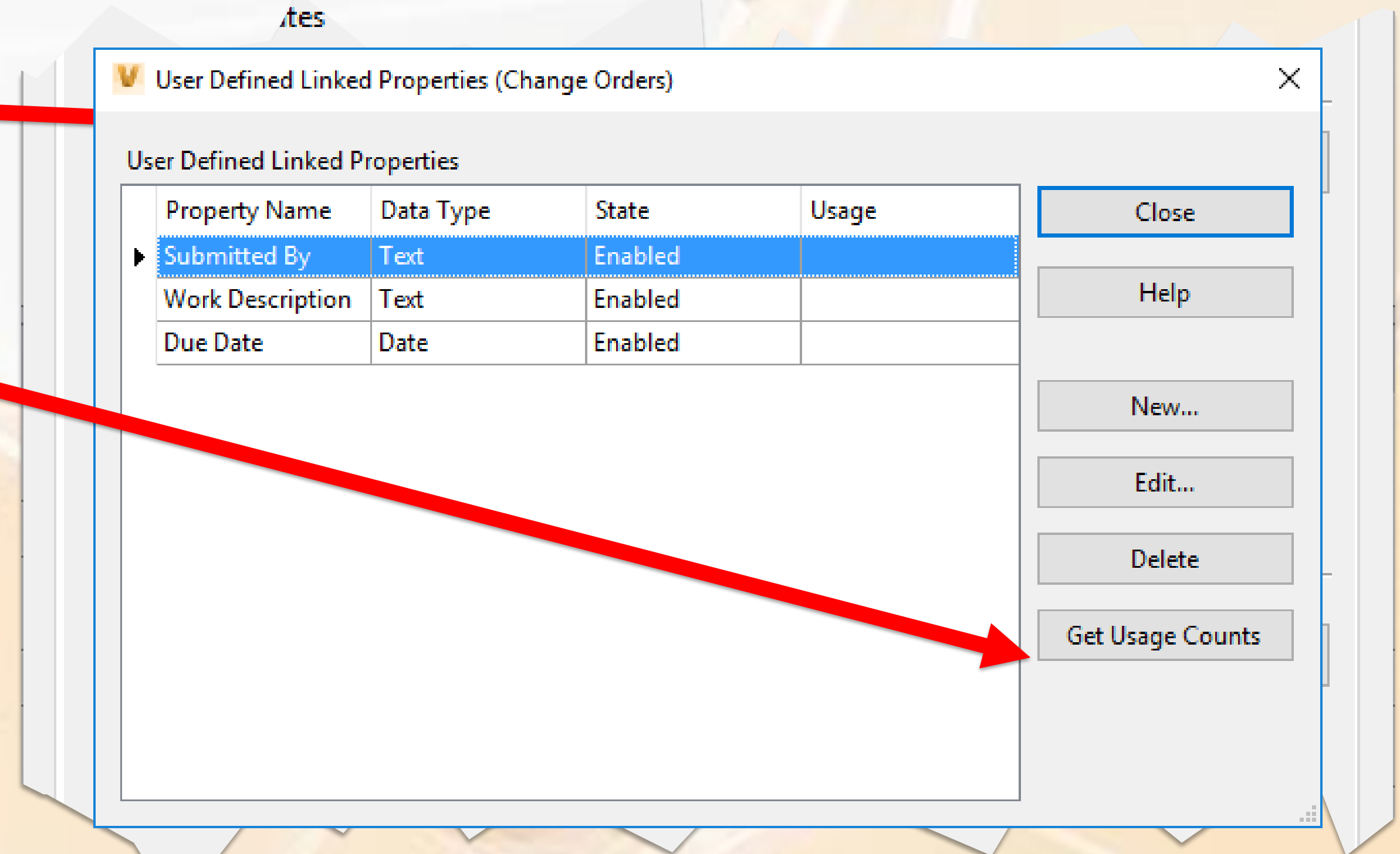




# Vault Settings – Change Orders Tab

ECO Markup Folder

Link Properties



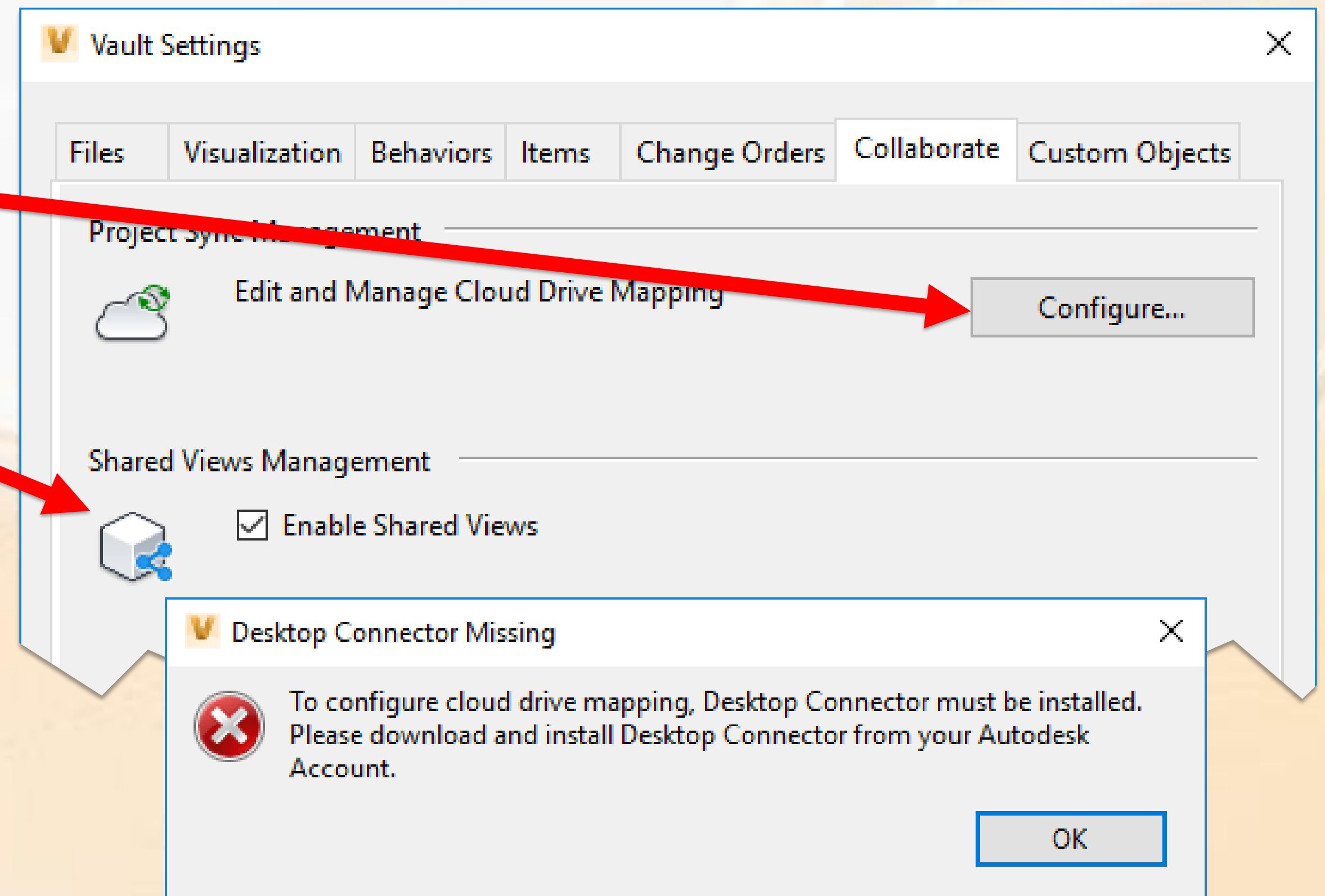
# Vault Settings – Collaborate Tab

Project Sync.

Shared Views

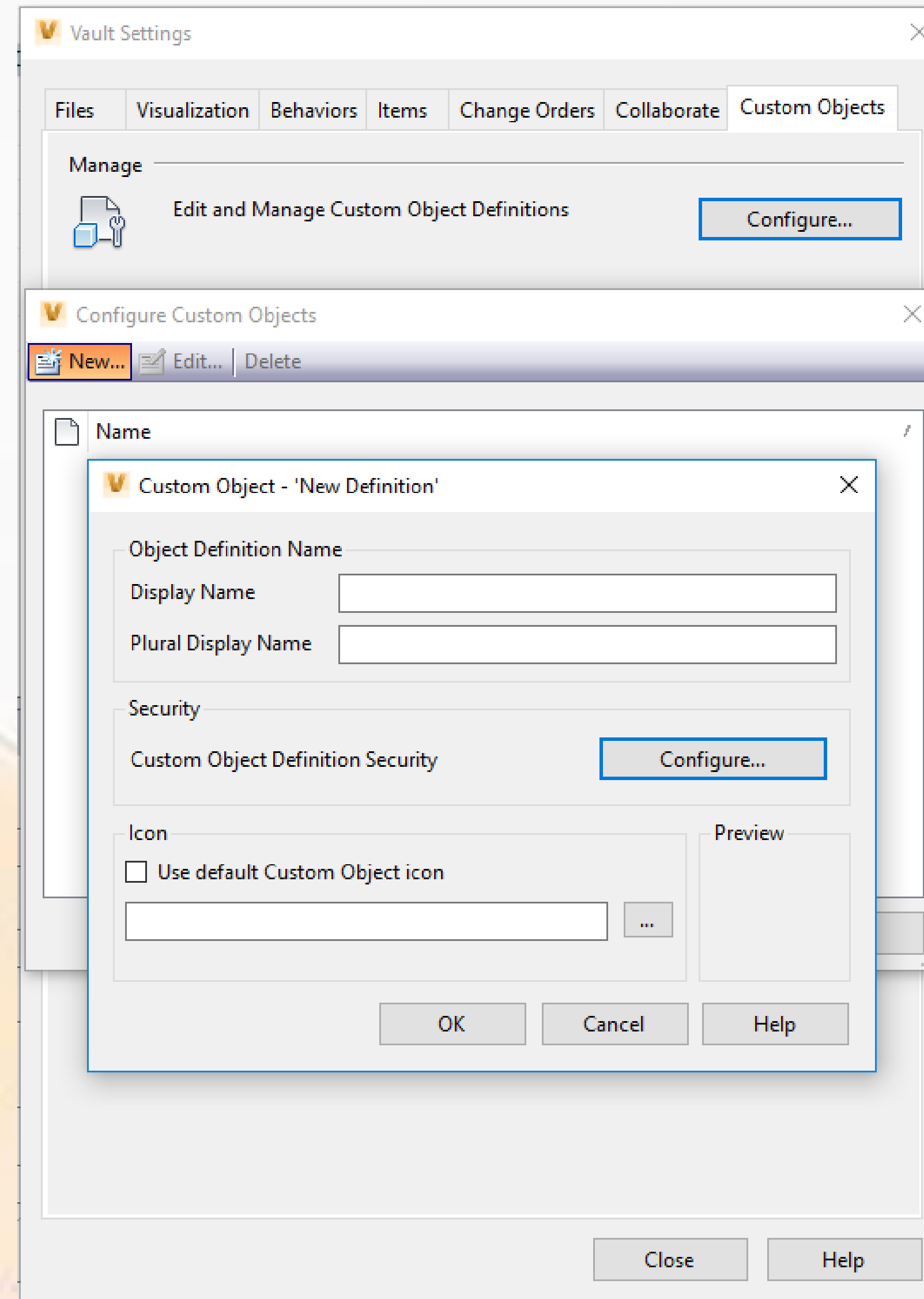
Subscription only benefit for Vault  
Workgroup & Professional

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





# Vault Settings – Custom Objects Tab



# Global Settings

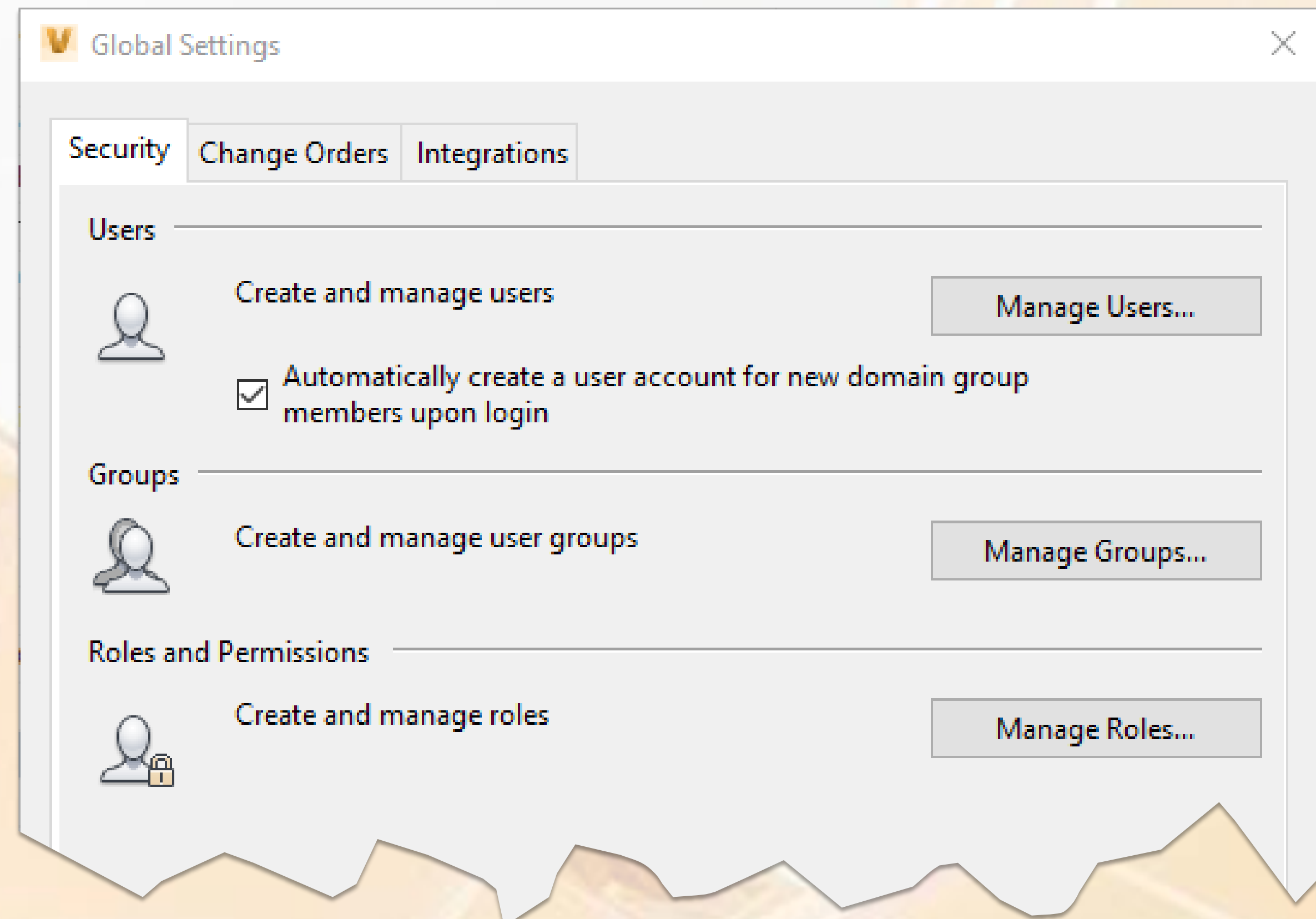




# Global Settings – Security Tab

**All that stuff Mark  
talked about earlier....**

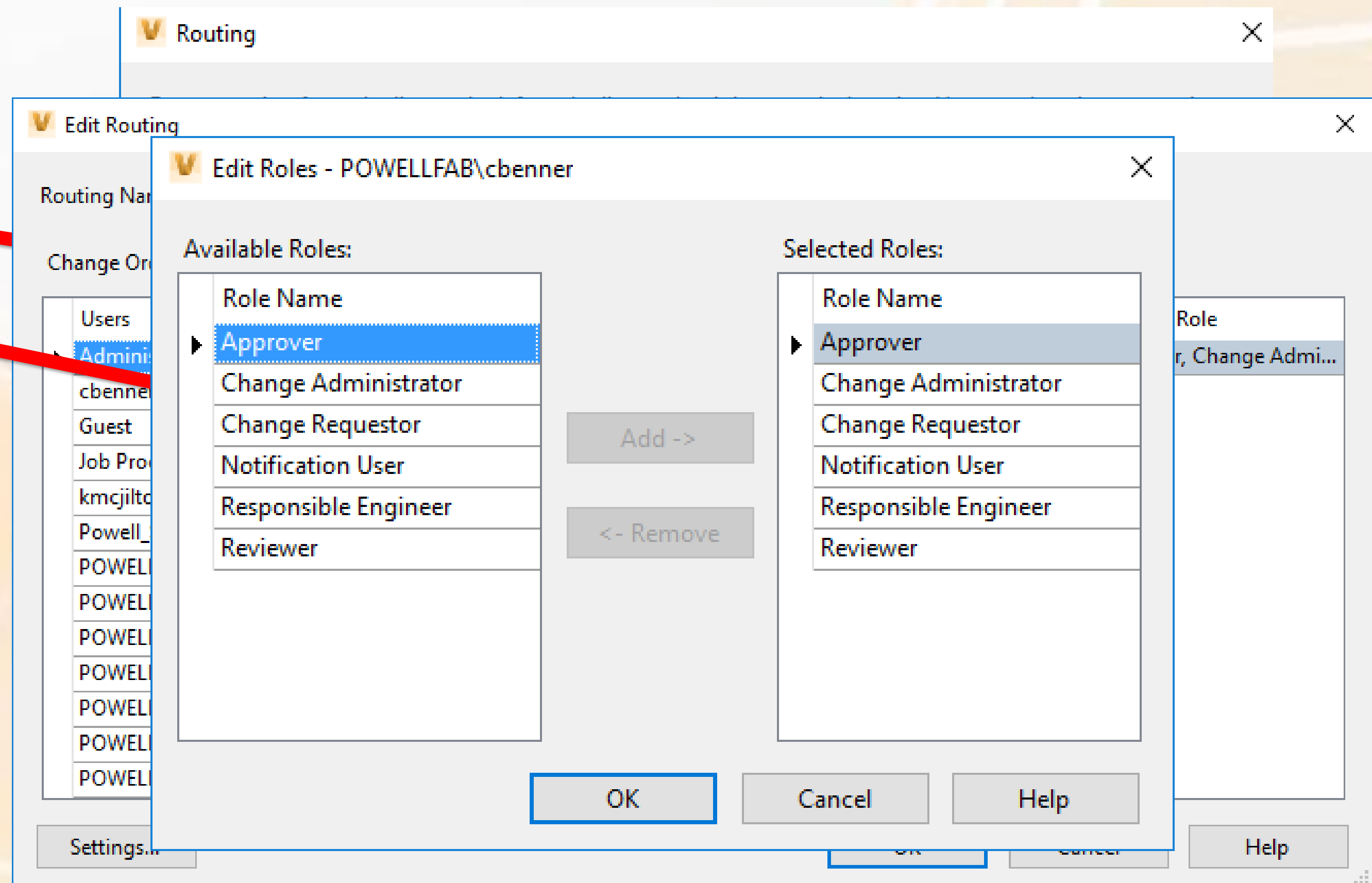
**Go here!**



# Global Settings – Change Orders Tab

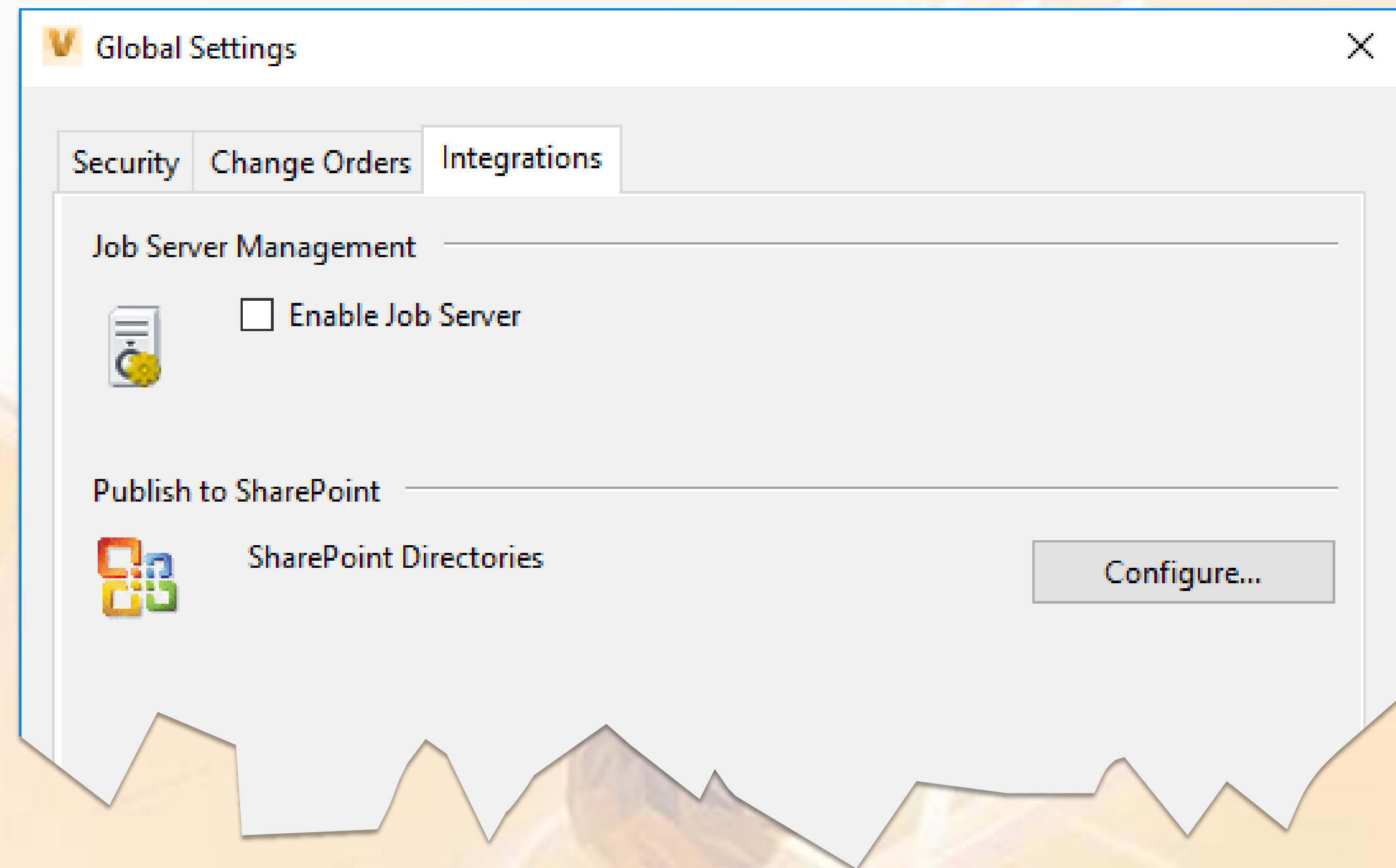
ECO Routing

Workflow Definition





# Global Settings – Integrations Tab

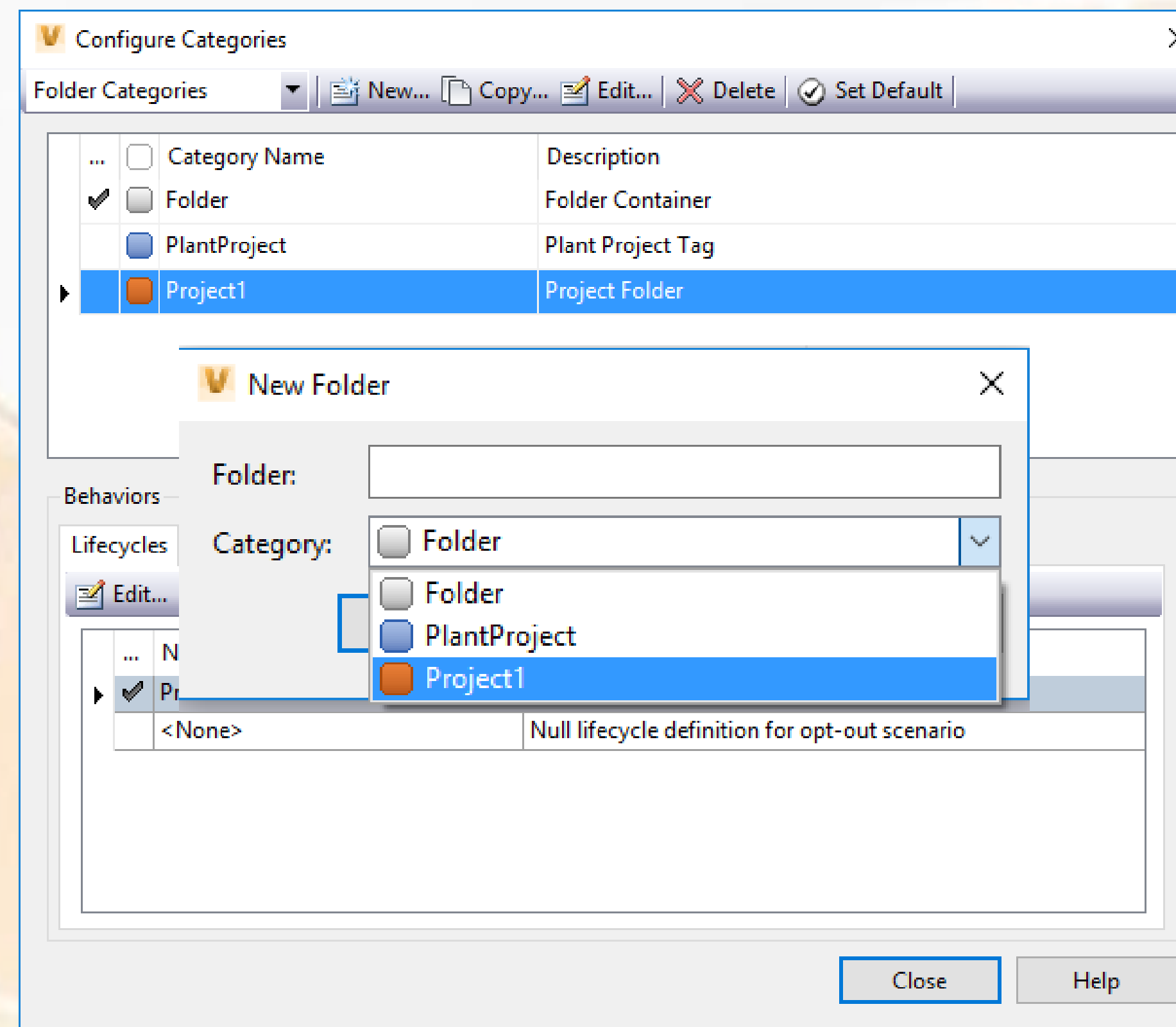


# Vault Project Folders

Create A Folder Category

Create A New Folder Location

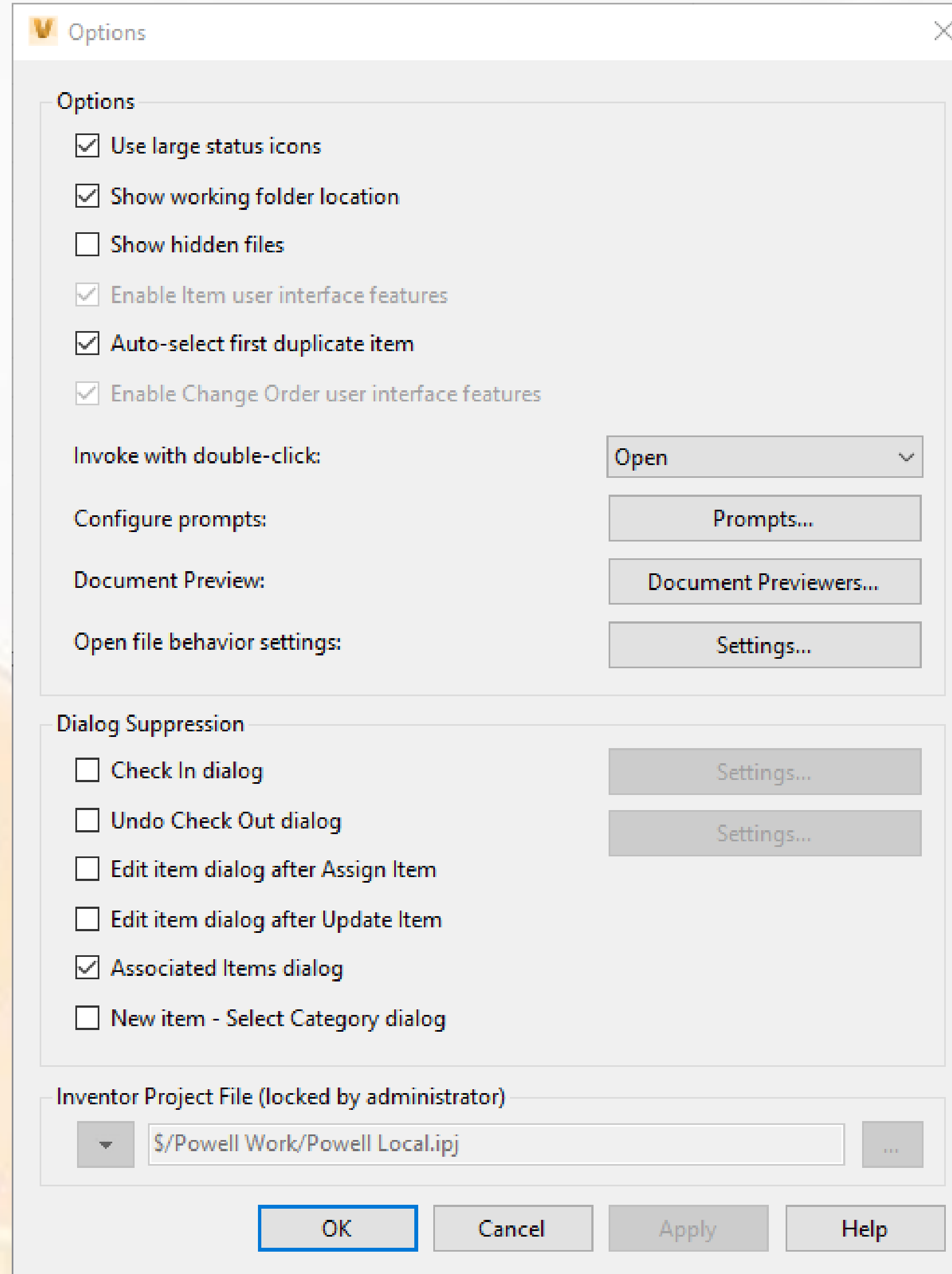
Add new data, or create links to existing data, to organize related data into the Project Folder.





# Vault User Options

Tools\Options



The screenshot shows the 'Options' dialog box for Autodesk Vault. The dialog is titled 'Options' and has a close button (X) in the top right corner. It is divided into several sections:

- Options:** This section contains six checkboxes:
  - ☒ Use large status icons
  - ☒ Show working folder location
  - ☐ Show hidden files
  - ☒ Enable Item user interface features
  - ☒ Auto-select first duplicate item
  - ☒ Enable Change Order user interface features
- Invoke with double-click:** A dropdown menu set to 'Open'.
- Configure prompts:** A button labeled 'Prompts...'.
- Document Preview:** A button labeled 'Document Previewers...'.
- Open file behavior settings:** A button labeled 'Settings...'.
- Dialog Suppression:** This section contains six checkboxes and two buttons:
  - ☐ Check In dialog (button: Settings...)
  - ☐ Undo Check Out dialog (button: Settings...)
  - ☐ Edit item dialog after Assign Item
  - ☐ Edit item dialog after Update Item
  - ☒ Associated Items dialog
  - ☐ New item - Select Category dialog
- Inventor Project File (locked by administrator):** A dropdown menu showing 'S:/Powell Work/Powell Local.ipj' and a button with three dots (...

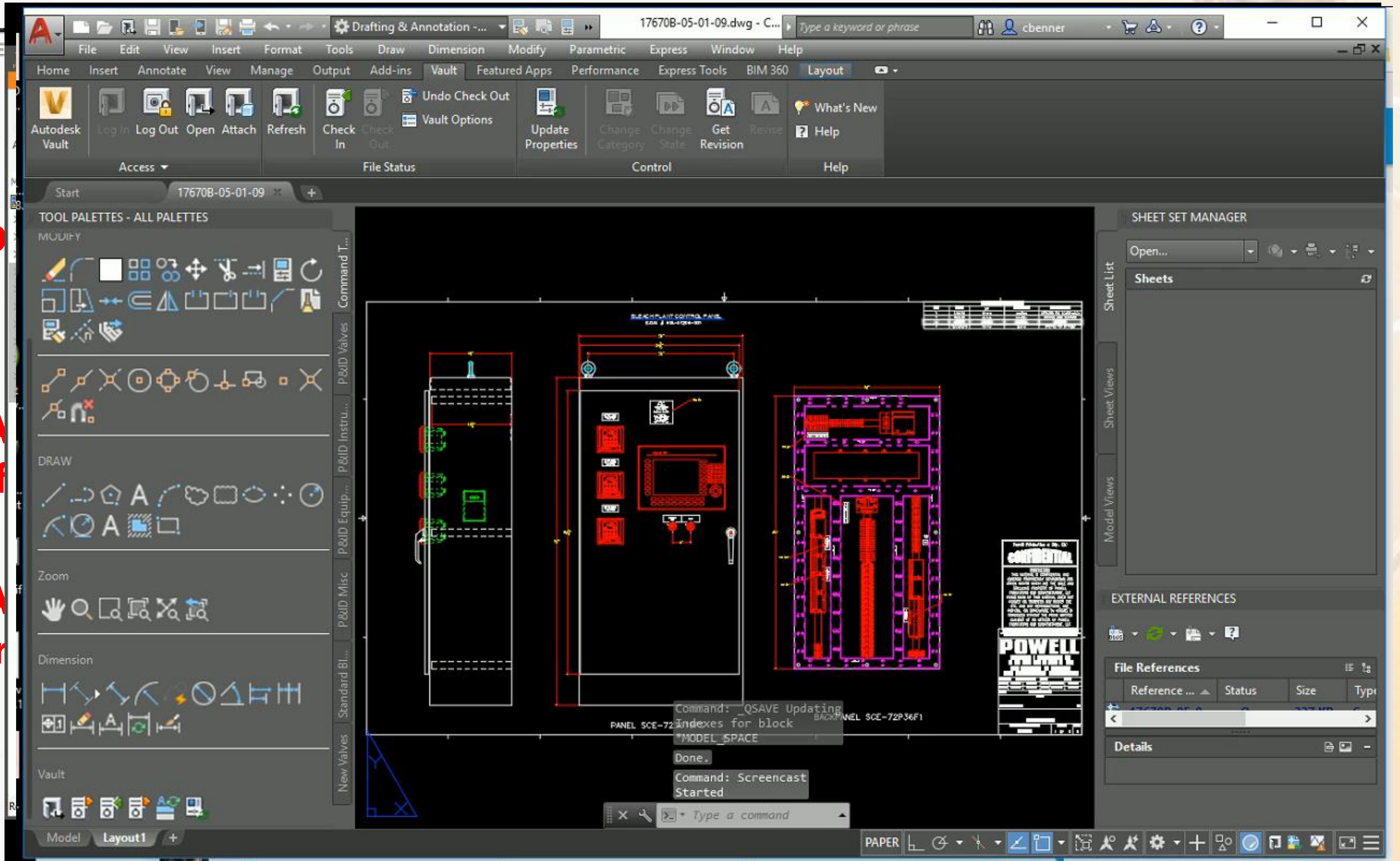
At the bottom of the dialog are four buttons: 'OK', 'Cancel', 'Apply', and 'Help'.



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## Other Vault Classes This Week:

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

**THANK  
YOU**







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