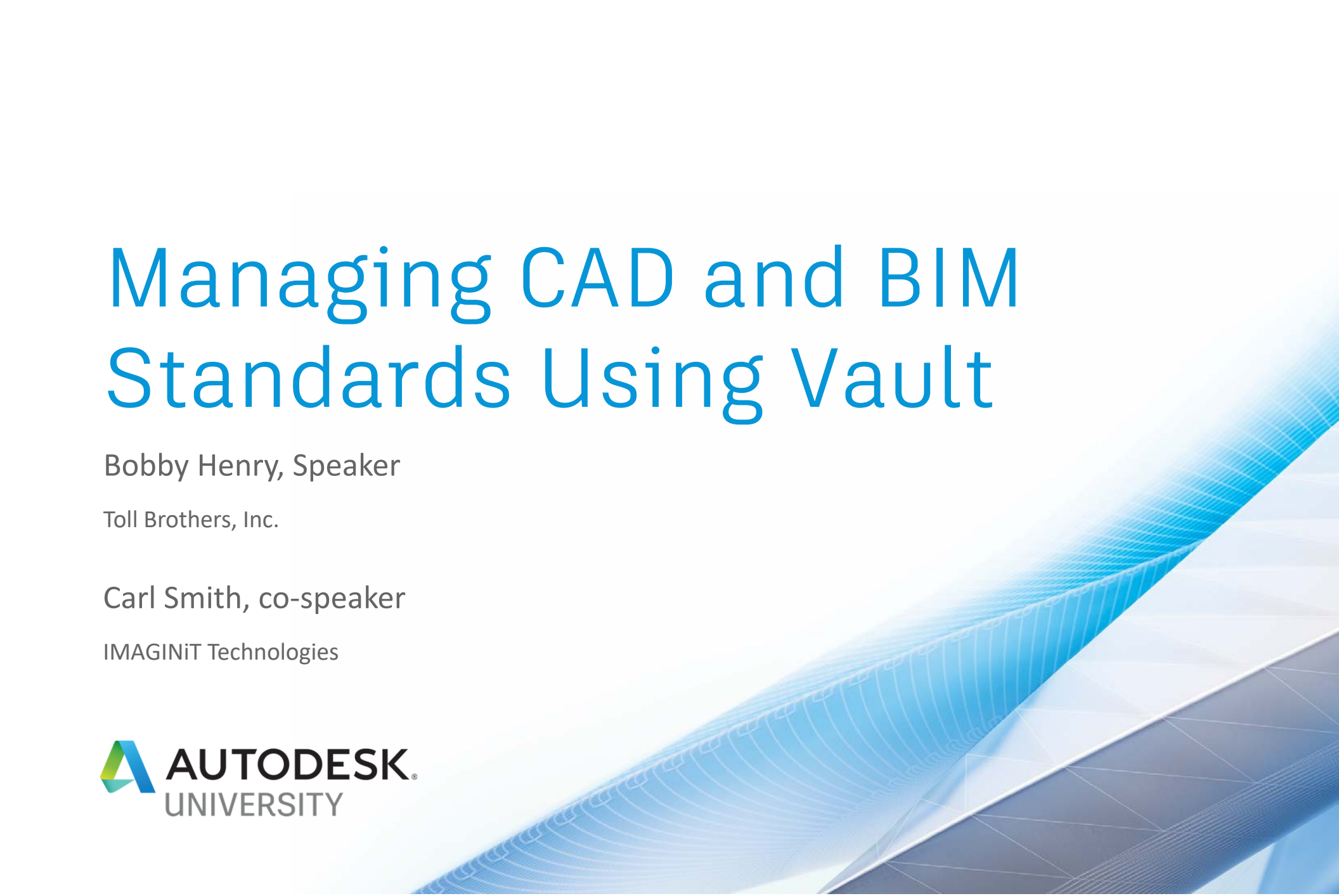
Managing CAD and BIM Standards Using Vault

Bobby Henry, Speaker

Toll Brothers, Inc.

Carl Smith, co-speaker

IMAGINiT Technologies

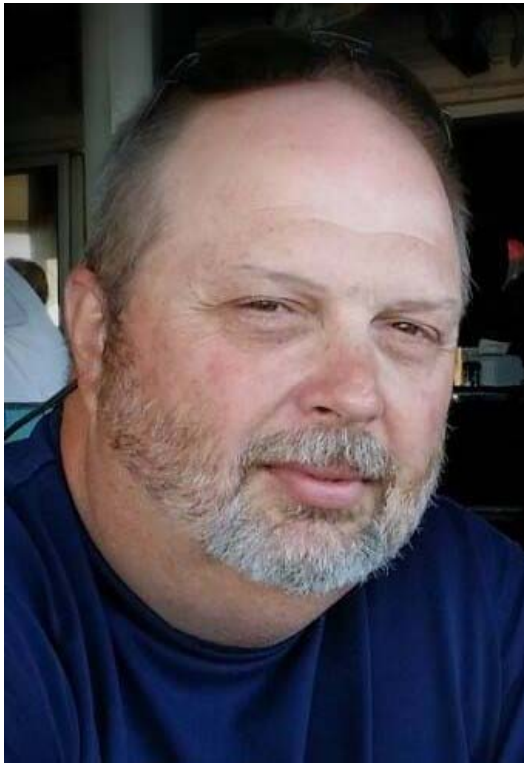


About the speaker

Bobby Henry

Toll Brothers Inc.

An AutoCAD Certified Professional with 18 years experience in the home building industry. Currently the Asst. CAD Manager for Toll Brothers supporting their architectural department by resolving use issues, updating existing software, and implementing new software.



About the co-speaker

Carl Smith,

IMAGINiT Technologies

An Autodesk certified instructor, sought after speaker, and blogger. Working as lead consultant, project manager and head trainer, Carl has in-depth knowledge of Autodesk products and their application in manufacturing plants across the U.S.

“Our ability to do great things with data will make a real difference in every aspect of our lives.”

Jennifer Pahlka, Founder and Executive Director for Code for America

Key Objectives

- VAULT CONFIGURATION

Learn how to custom aspects of Vault to better support standards management

- PRODUCT CONFIGURATIONS

Learn how to configure some Autodesk products to look at Vault for the latest standards

- UPDATING CONTENT WORKFLOW

Discover workflows for modifying, testing, and deploying standards

- DEPLOYMENT METHODS

Learn how to set up workflows to automate rapid deployments of standards

Vault Configuration

Folder Structure

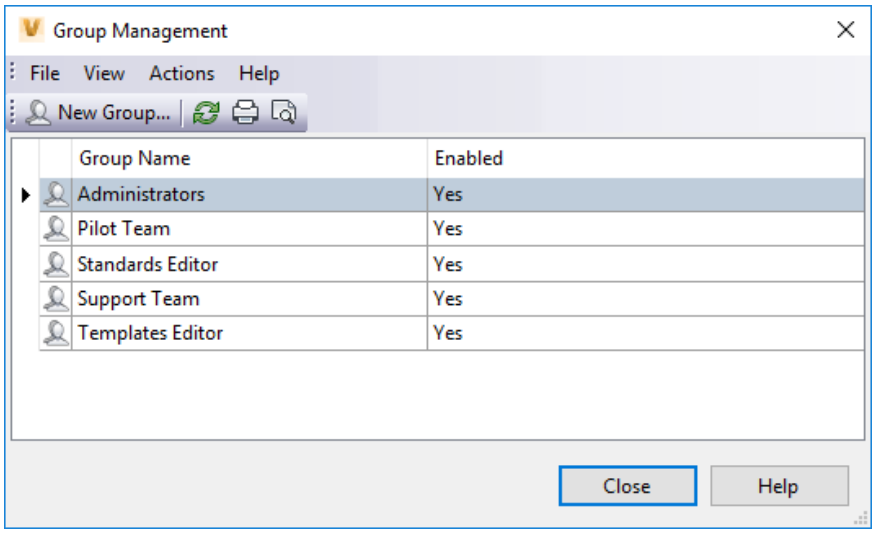
Product Type

Product Versions

Content Type

User Groups

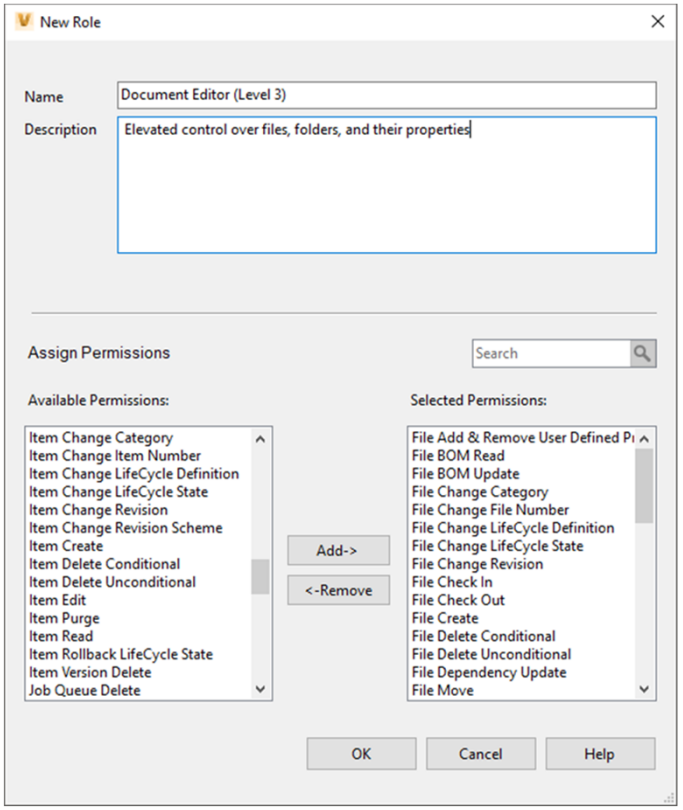
User Groups


Group Management
File
View
Actions
Help
New Group...
Group Name
Enabled
Administrators
Yes
Pilot Team
Yes
Standards Editor
Yes
Support Team
Yes
Templates Editor
Yes
Close
Help

Roles

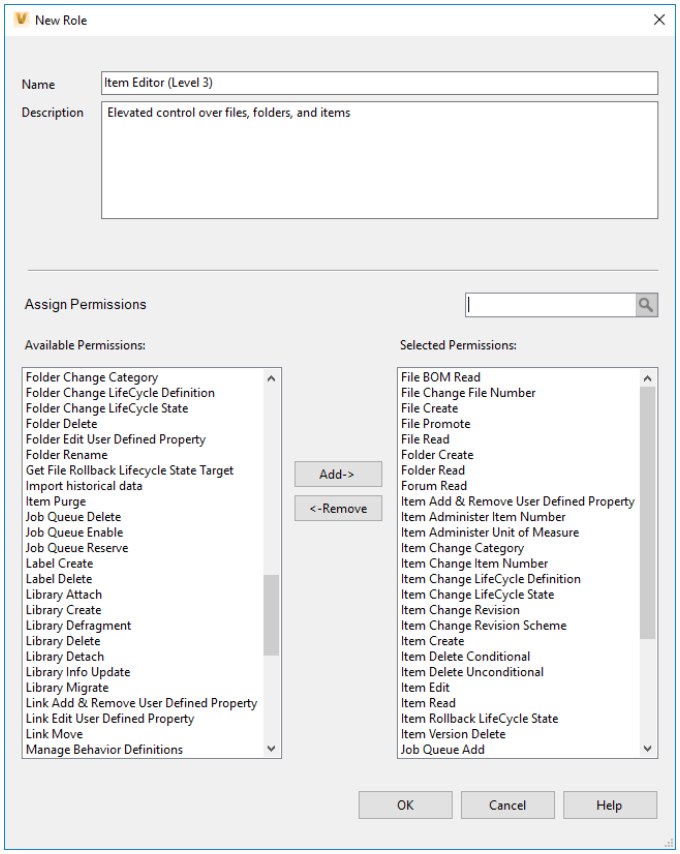
Document Editor (Level 3)

- File Change Category
- File Change LifeCycle State
- File Change Revision
- File Delete Unconditional
- File Rollback LifeCycle State
- File Version Delete Unconditionally
- Folder Change Category
- Folder Change LifeCycle State



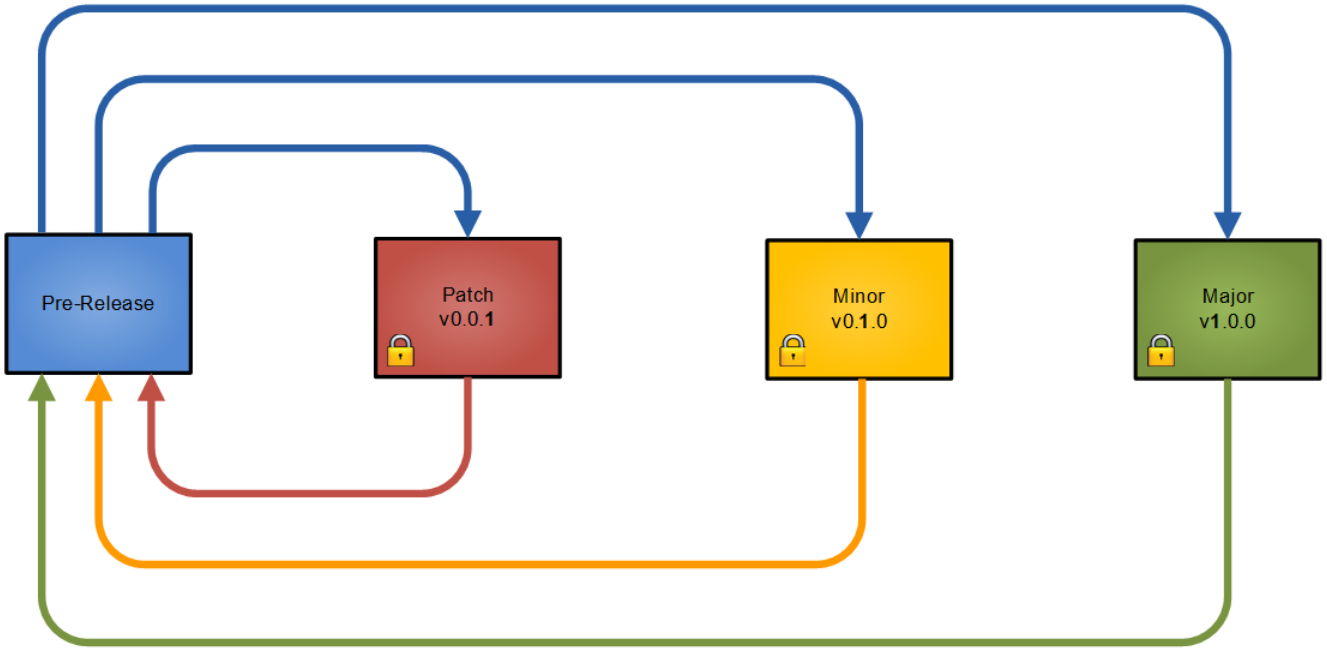
Item Editor (Level 3)

- Item Administer Item Number
- Item Administer Unit of Measure
- Item Delete Unconditional

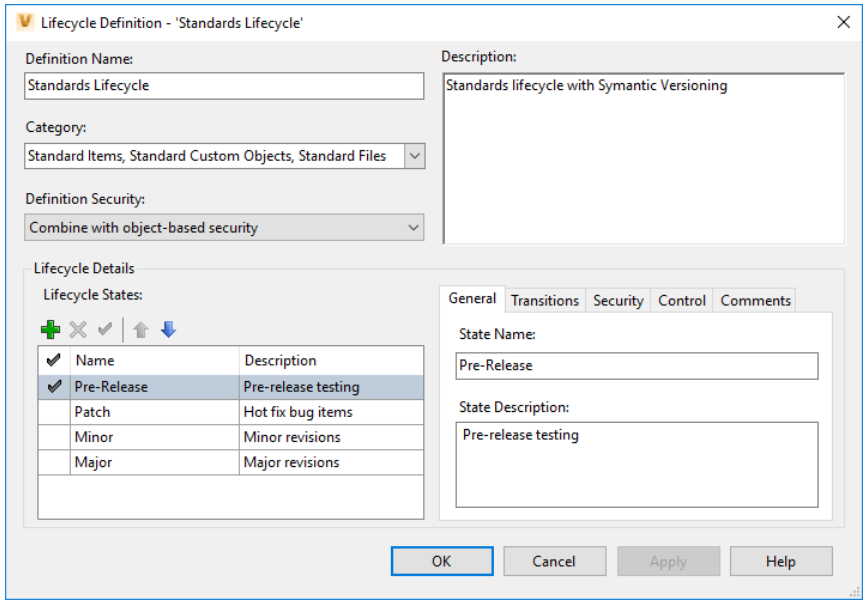


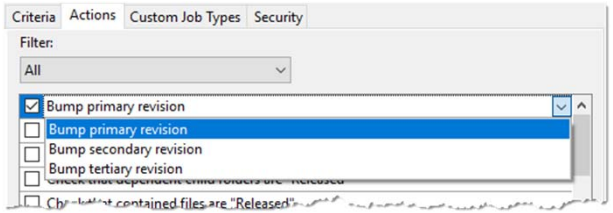
Lifecycles and States

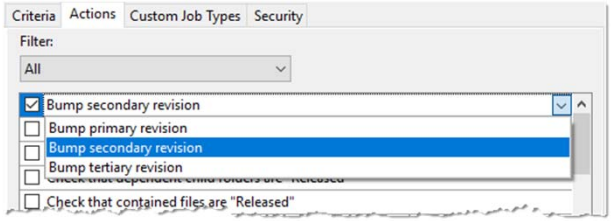
Standards Lifecycle

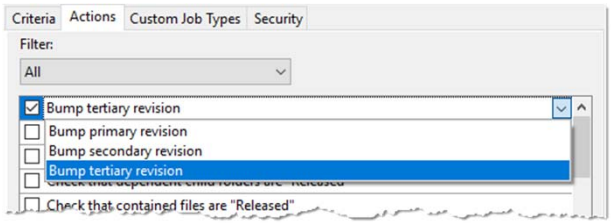


Standards Lifecycle



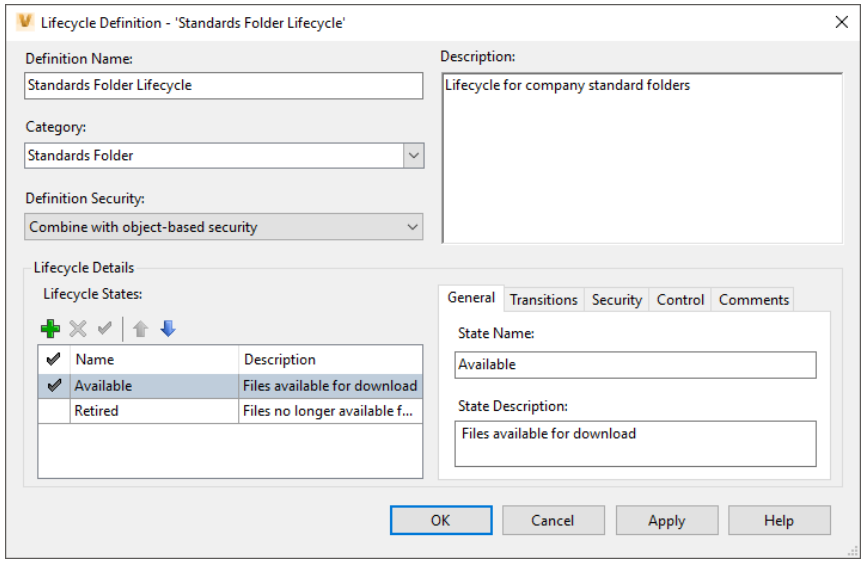






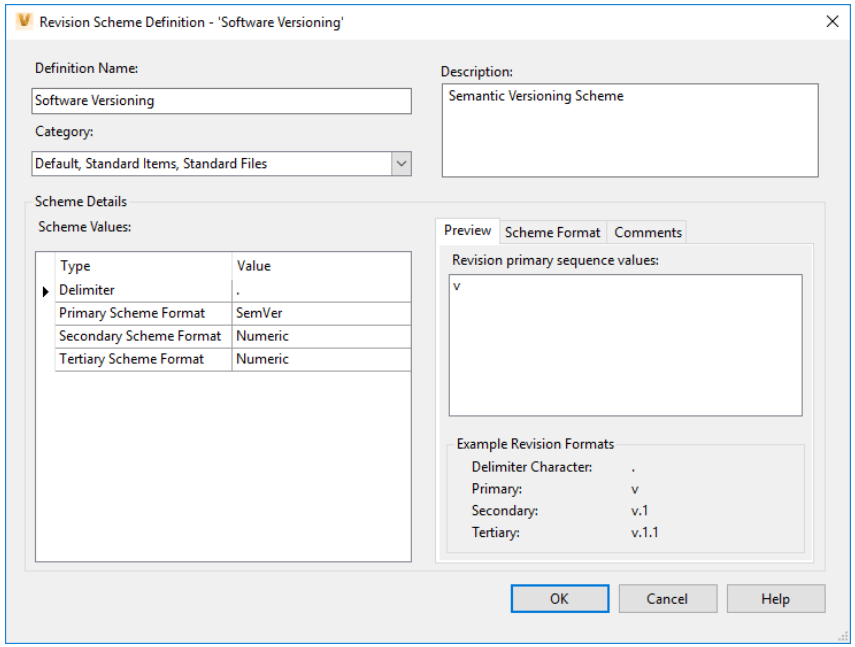
Standard Folders Lifecycle

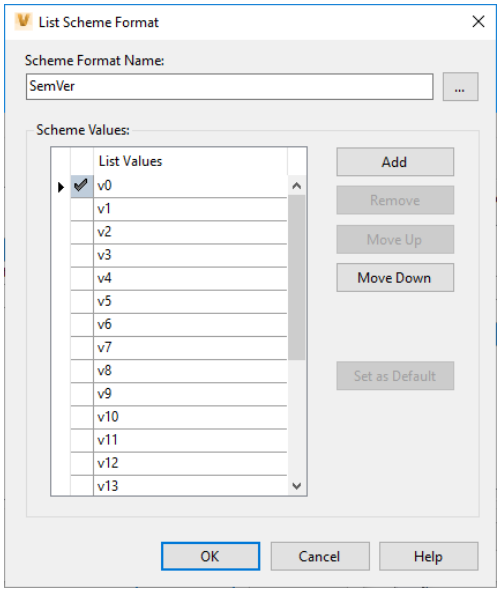
Standard Folders Lifecycle



Revision Schemes

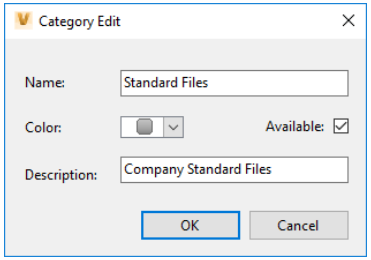
Software Versioning

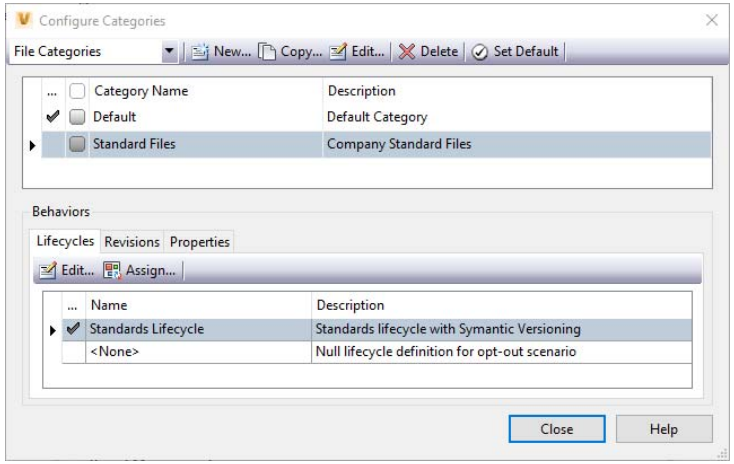




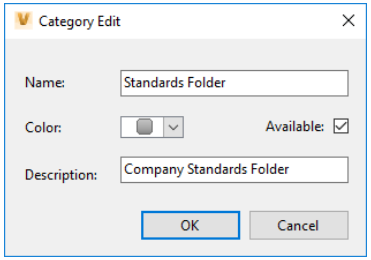
Categories

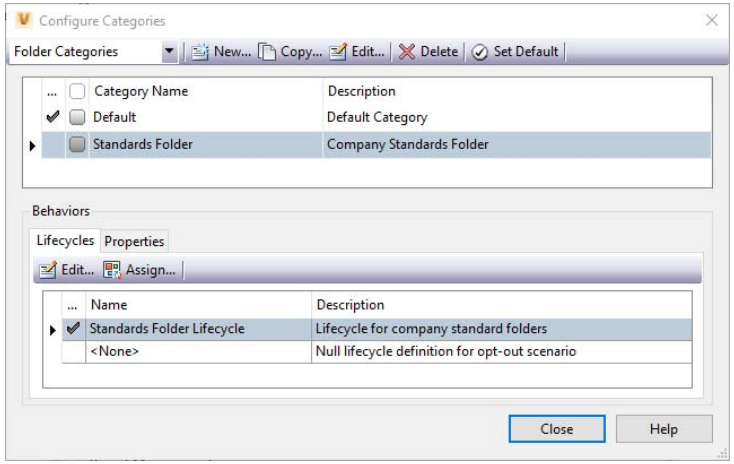
File Category



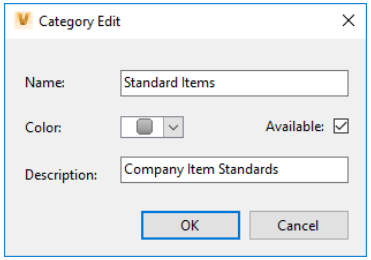


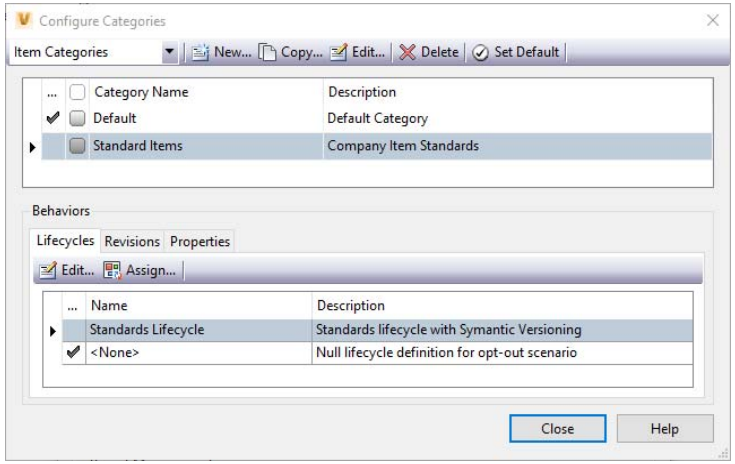
Folder Category





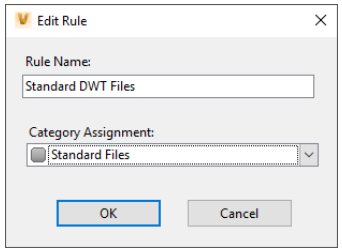
Item Category

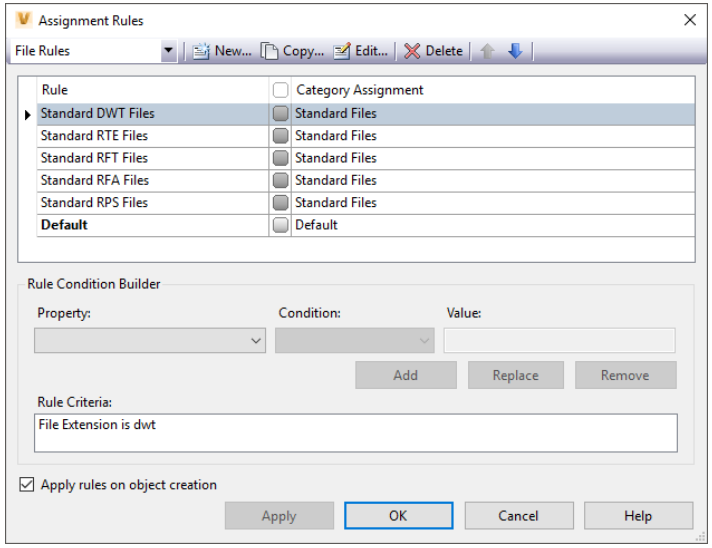


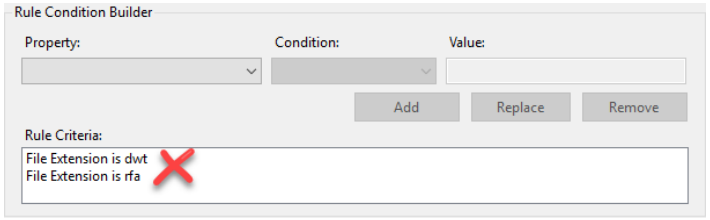


Rule Sets

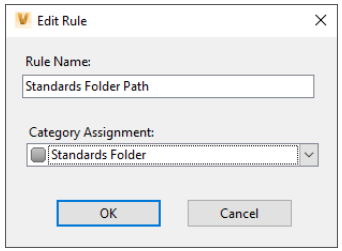
File Rule Sets

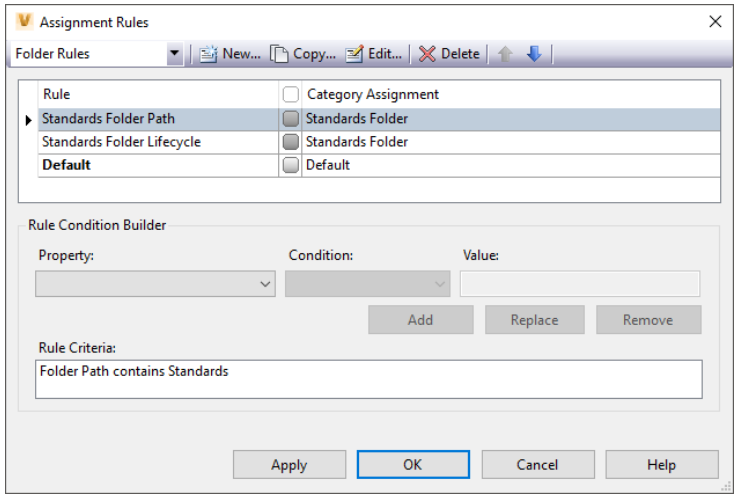





Rule Condition Builder
Property:
Condition:
Value:
Add
Replace
Remove
Rule Criteria:
File Extension is dwt
File Extension is rfa

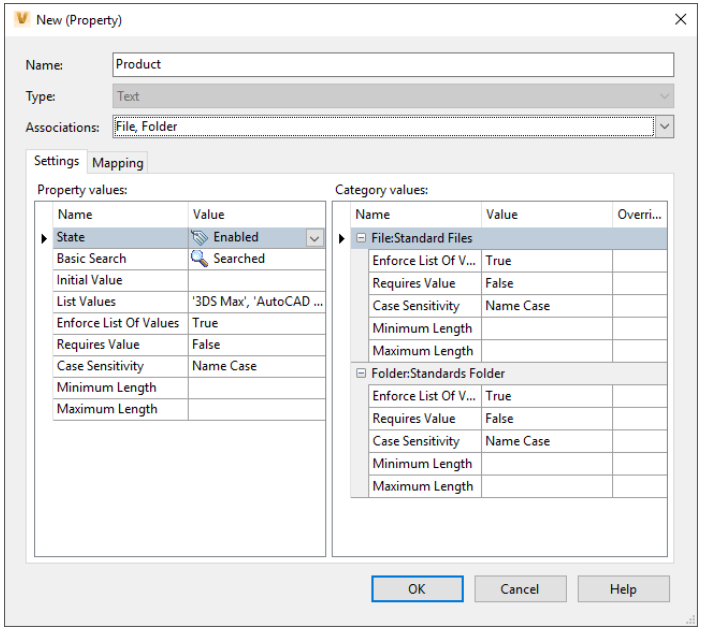
Folder Rule Sets



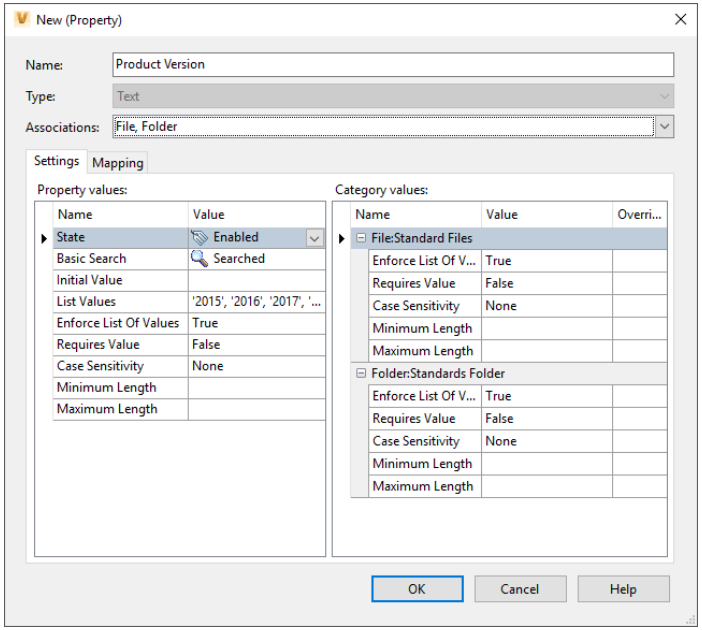


Properties

Properties


New (Property)
Name:
Product
Type:
Text
Associations:
File, Folder
Settings
Mapping
Property values:
Name
Value
State
Enabled
Basic Search
Searched
Initial Value
List Values
'3DS Max', 'AutoCAD ...
Enforce List Of Values
True
Requires Value
False
Case Sensitivity
Name Case
Minimum Length
Maximum Length
Category values:
Name
Value
Overri...
File:Standard Files
Enforce List Of V...
True
Requires Value
False
Case Sensitivity
Name Case
Minimum Length
Maximum Length
Folder:Standards Folder
Enforce List Of V...
True
Requires Value
False
Case Sensitivity
Name Case
Minimum Length
Maximum Length
OK
Cancel
Help

Properties

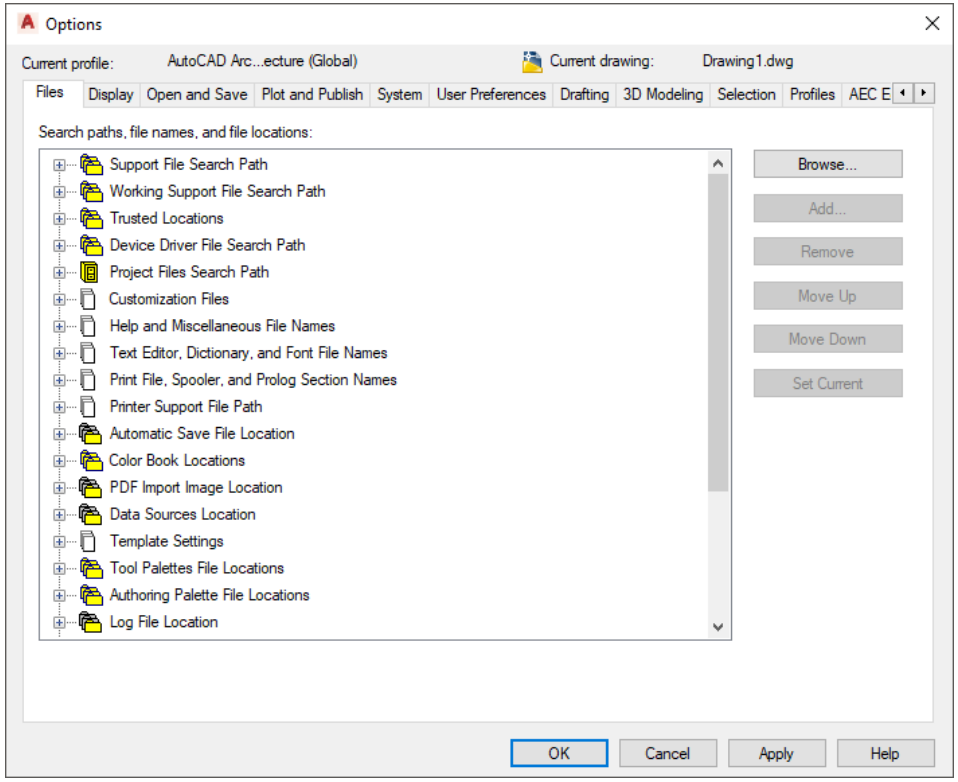

New (Property)
Name:
Product Version
Type:
Text
Associations:
File, Folder
Settings
Mapping
Property values:
Name
Value
State
Enabled
Basic Search
Searched
Initial Value
List Values
'2015', '2016', '2017', '...
Enforce List Of Values
True
Requires Value
False
Case Sensitivity
None
Minimum Length
Maximum Length
Category values:
Name
Value
Overri...
File:Standard Files
Enforce List Of V...
True
Requires Value
False
Case Sensitivity
None
Minimum Length
Maximum Length
Folder:Standards Folder
Enforce List Of V...
True
Requires Value
False
Case Sensitivity
None
Minimum Length
Maximum Length
OK
Cancel
Help

Vault Configuration Complete!

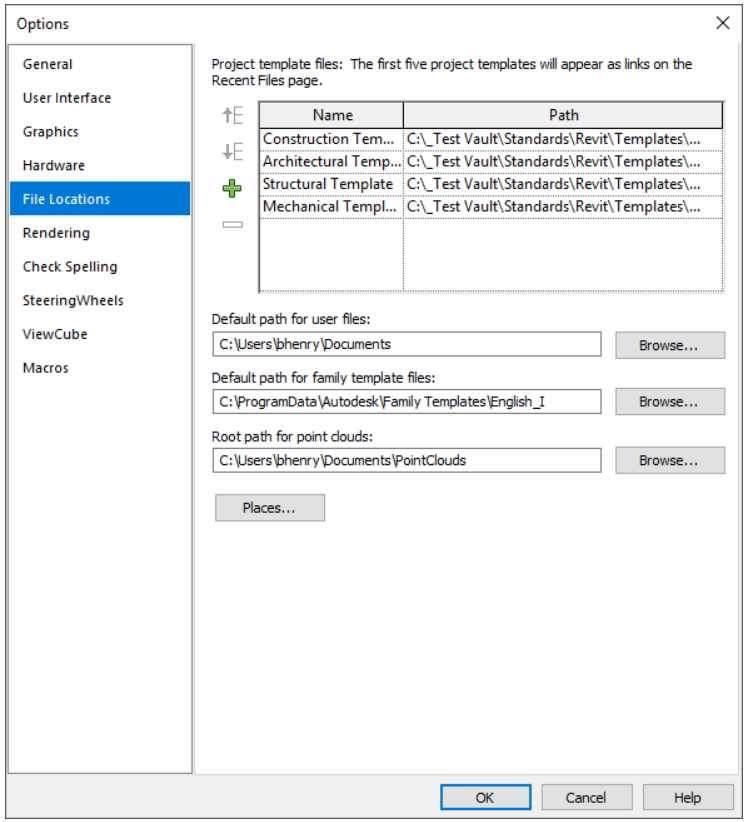
Production Configuration

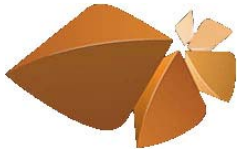
Architecture, Engineering & Construction Collection

AutoCAD


Options
Current profile: AutoCAD Arc...ecture (Global)
Current drawing: Drawing1.dwg
Files
Display
Open and Save
Plot and Publish
System
User Preferences
Drafting
3D Modeling
Selection
Profiles
AEC E
Search paths, file names, and file locations:
Support File Search Path
Working Support File Search Path
Trusted Locations
Device Driver File Search Path
Project Files Search Path
Customization Files
Help and Miscellaneous File Names
Text Editor, Dictionary, and Font File Names
Print File, Spooler, and Prolog Section Names
Printer Support File Path
Automatic Save File Location
Color Book Locations
PDF Import Image Location
Data Sources Location
Template Settings
Tool Palettes File Locations
Authoring Palette File Locations
Log File Location
Browse...
Add...
Remove
Move Up
Move Down
Set Current
OK
Cancel
Apply
Help

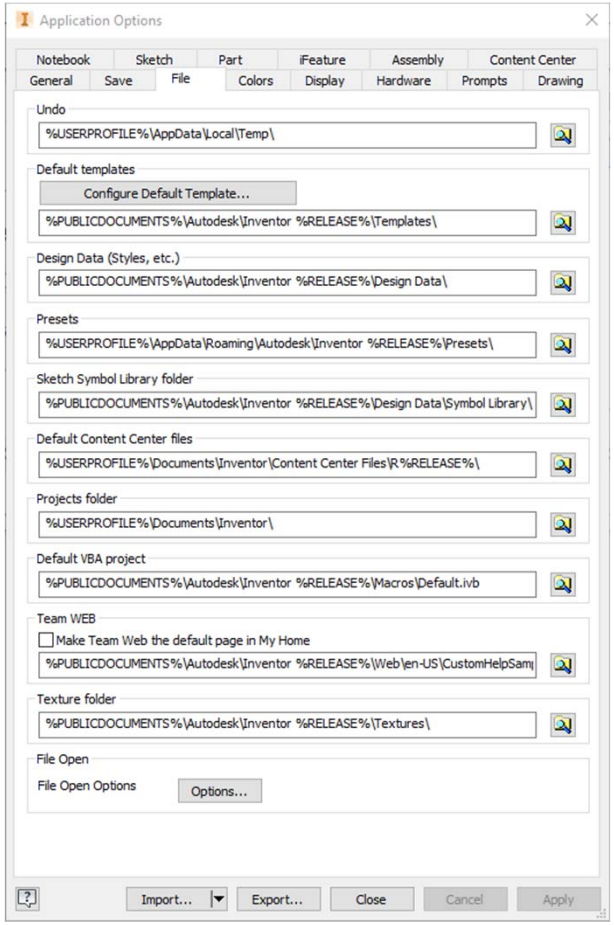
Revit

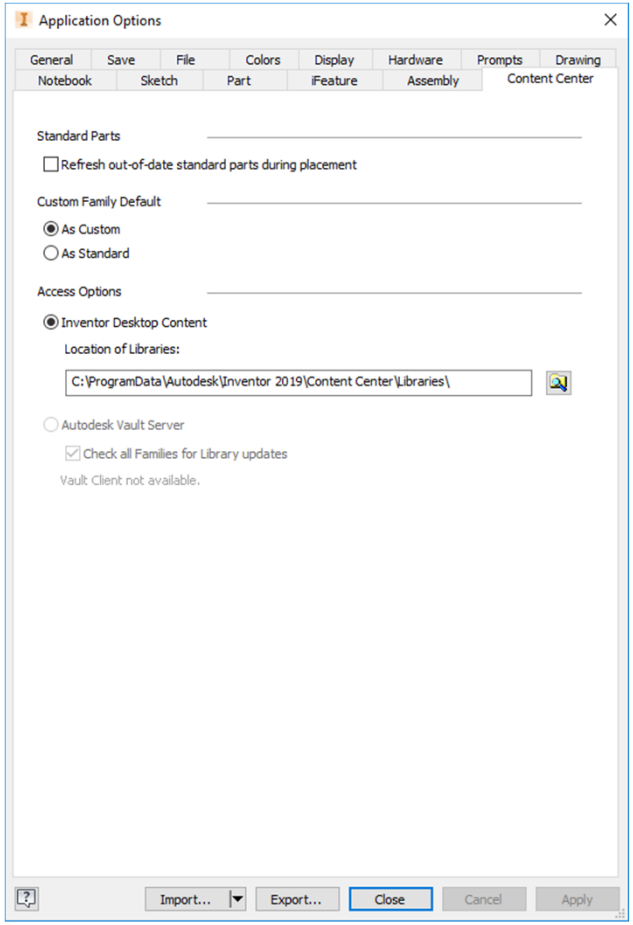

Options
General
User Interface
Graphics
Hardware
File Locations
Rendering
Check Spelling
SteeringWheels
ViewCube
Macros
Project template files: The first five project templates will appear as links on the Recent Files page.
Name
Path
Construction Tem...
C:_Test Vault\Standards\Revit\Templates\...
Architectural Temp...
C:_Test Vault\Standards\Revit\Templates\...
Structural Template
C:_Test Vault\Standards\Revit\Templates\...
Mechanical Templ...
C:_Test Vault\Standards\Revit\Templates\...
Default path for user files:
C:\Users\bhenry\Documents
Browse...
Default path for family template files:
C:\ProgramData\Autodesk\Family Templates\English_I
Browse...
Root path for point clouds:
C:\Users\bhenry\Documents\PointClouds
Browse...
Places...
OK
Cancel
Help

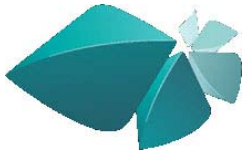


Product Design & Manufacturing Collection

Inventor

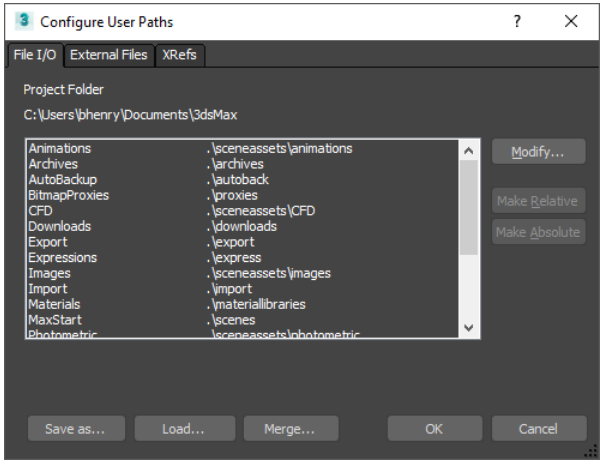

Application Options
Notebook
Sketch
Part
iFeature
Assembly
Content Center
General
Save
File
Colors
Display
Hardware
Prompts
Drawing
Undo
%USERPROFILE%\AppData\Local\Temp\
Default templates
Configure Default Template...
%PUBLICDOCUMENTS%\Autodesk\Inventor %RELEASE%\Templates\
Design Data (Styles, etc.)
%PUBLICDOCUMENTS%\Autodesk\Inventor %RELEASE%\Design Data\
Presets
%USERPROFILE%\AppData\Roaming\Autodesk\Inventor %RELEASE%\Presets\
Sketch Symbol Library folder
%PUBLICDOCUMENTS%\Autodesk\Inventor %RELEASE%\Design Data\Symbol Library\
Default Content Center files
%USERPROFILE%\Documents\Inventor\Content Center Files\R%RELEASE%\
Projects folder
%USERPROFILE%\Documents\Inventor\
Default VBA project
%PUBLICDOCUMENTS%\Autodesk\Inventor %RELEASE%\Macros\Default.ivb
Team WEB
Make Team Web the default page in My Home
%PUBLICDOCUMENTS%\Autodesk\Inventor %RELEASE%\Web\en-US\CustomHelpSam
Texture folder
%PUBLICDOCUMENTS%\Autodesk\Inventor %RELEASE%\Textures\
File Open
File Open Options
Options...
Import...
Export...
Close
Cancel
Apply

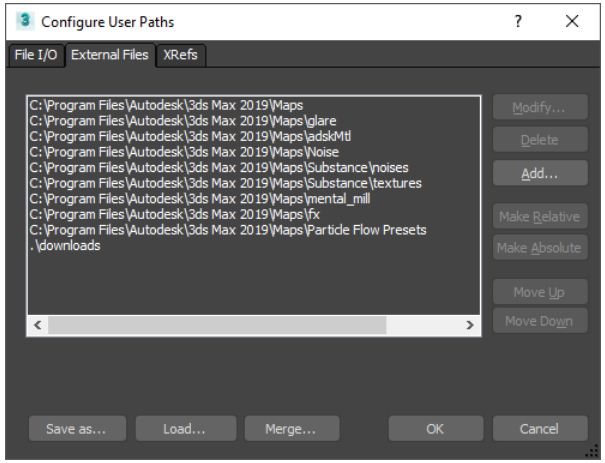

Application Options
General
Save
File
Colors
Display
Hardware
Prompts
Drawing
Notebook
Sketch
Part
iFeature
Assembly
Content Center
Standard Parts
Refresh out-of-date standard parts during placement
Custom Family Default
As Custom
As Standard
Access Options
Inventor Desktop Content
Location of Libraries:
C:\ProgramData\Autodesk\Inventor 2019\Content Center\Libraries\
Autodesk Vault Server
Check all Families for Library updates
Vault Client not available.
Import...
Export...
Close
Cancel
Apply

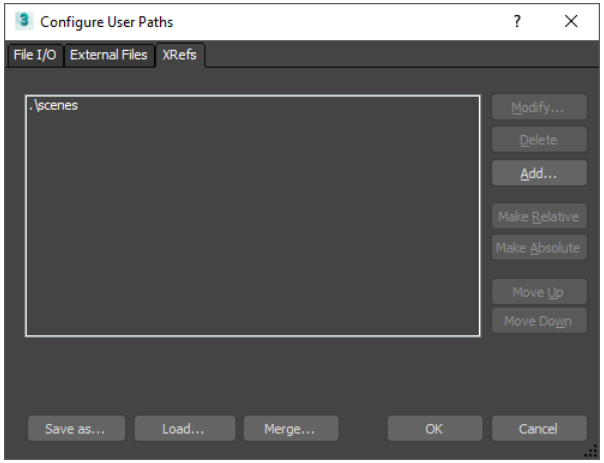


Media & Entertainment Collection

3DS Max


Configure User Paths
File I/O
External Files
XRefs
Project Folder
C:\Users\bhenry\Documents\3dsMax
Animations .\sceneassets\animations
Archives .\archives
AutoBackup .\autoback
BitmapProxies .\proxies
CFD .\sceneassets\CFD
Downloads .\downloads
Export .\export
Expressions .\express
Images .\sceneassets\images
Import .\import
Materials .\materiallibraries
MaxStart .\scenes
Photometric .\sceneassets\photometric
Modify...
Make Relative
Make Absolute
Save as...
Load...
Merge...
OK
Cancel

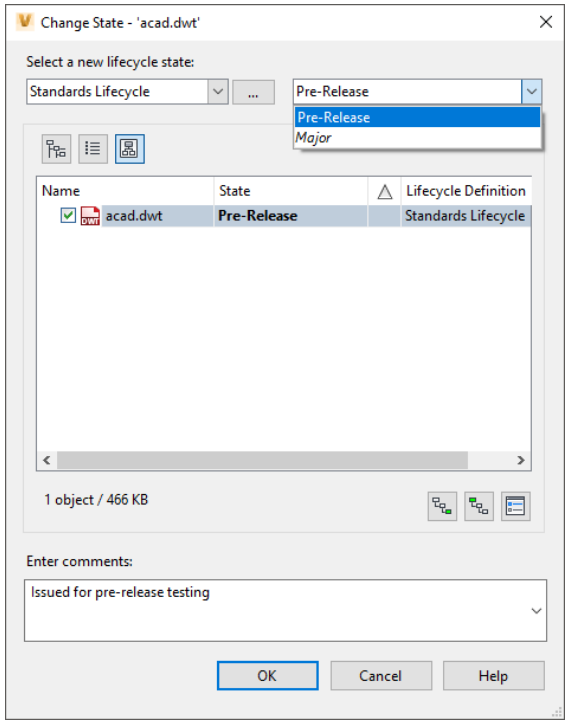

Configure User Paths
File I/O
External Files
XRefs
C:\Program Files\Autodesk\3ds Max 2019\Maps
C:\Program Files\Autodesk\3ds Max 2019\Maps\glare
C:\Program Files\Autodesk\3ds Max 2019\Maps\adskMtl
C:\Program Files\Autodesk\3ds Max 2019\Maps\Noise
C:\Program Files\Autodesk\3ds Max 2019\Maps\Substance\noises
C:\Program Files\Autodesk\3ds Max 2019\Maps\Substance\textures
C:\Program Files\Autodesk\3ds Max 2019\Maps\mental_mill
C:\Program Files\Autodesk\3ds Max 2019\Maps\fx
C:\Program Files\Autodesk\3ds Max 2019\Maps\Particle Flow Presets
.\downloads
Modify...
Delete
Add...
Make Relative
Make Absolute
Move Up
Move Down
Save as...
Load...
Merge...
OK
Cancel


Configure User Paths
File I/O
External Files
XRefs
.\scenes
Modify...
Delete
Add...
Make Relative
Make Absolute
Move Up
Move Down
Save as...
Load...
Merge...
OK
Cancel

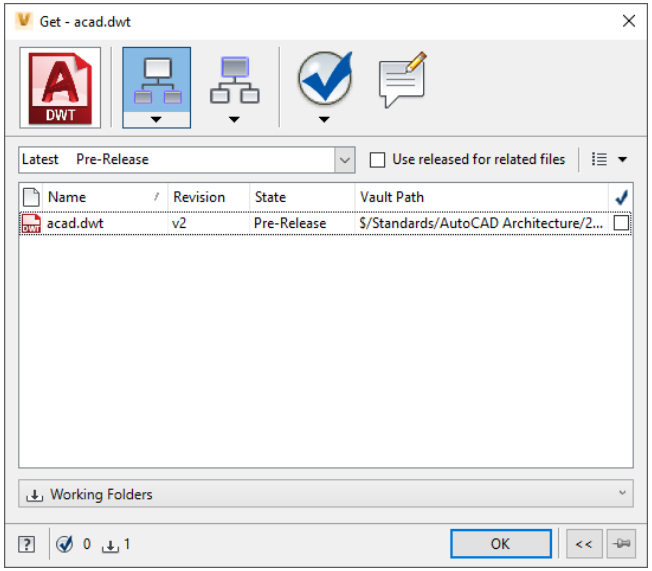
Product Configuration Complete!

Workflows for Updating Content

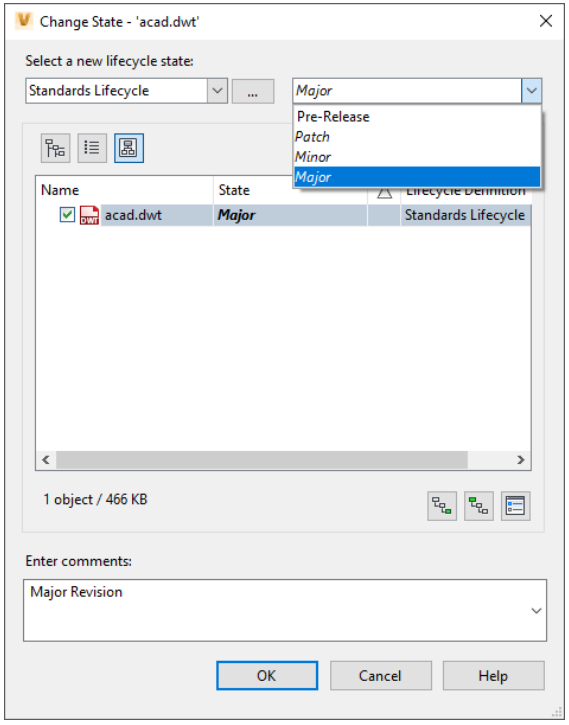
Modifying Content

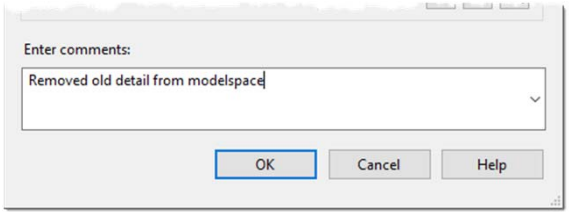


Testing Content



Approving Content





Update Workflow Complete!

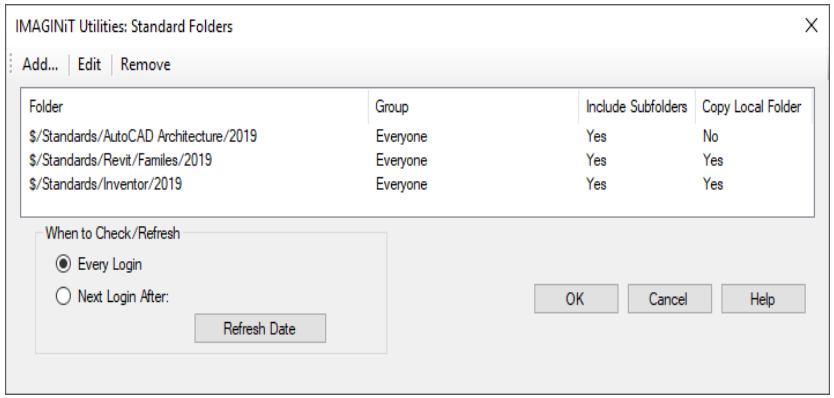
Methods for Deploying Updates

Manually

Automatically

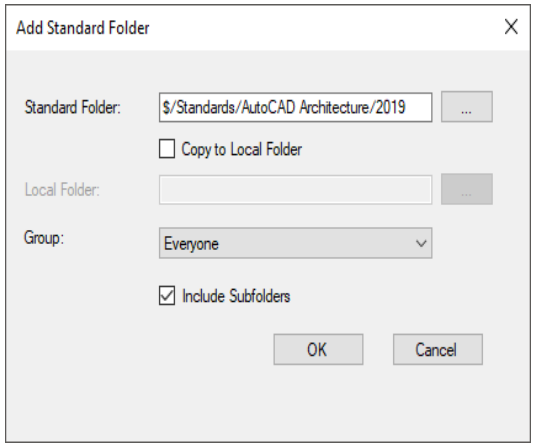
Standards Folder

- **Email Notifications:**
  - Forces a get-latest on single folders
  - Every Login or After Specified Date



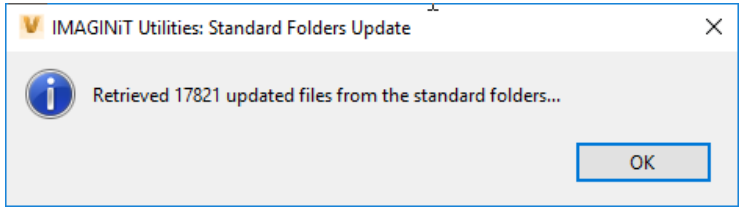
Standards Folder

- **Email Notifications:**
  - Easy configuration
  - Allows for Local Folders



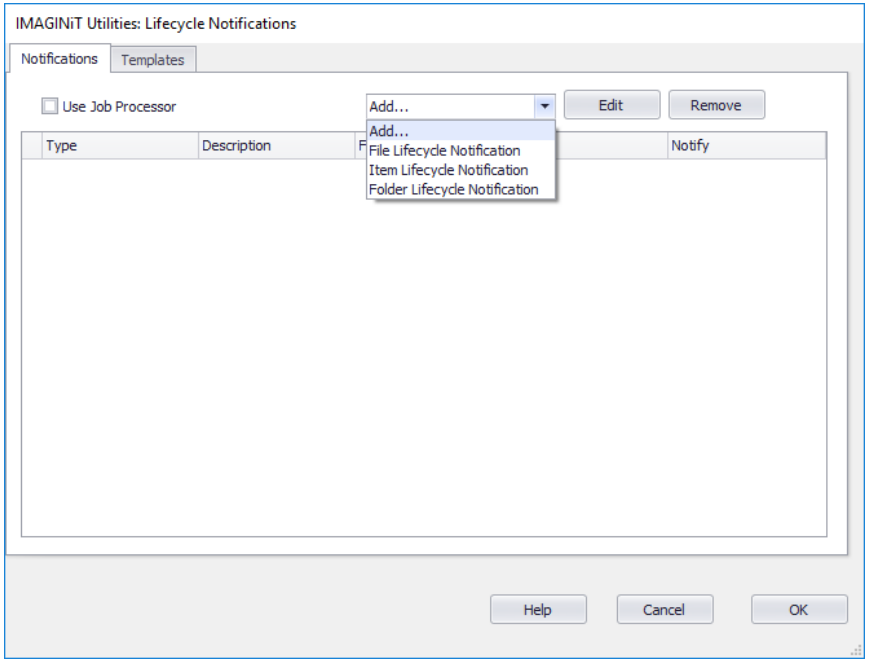
Standards Folder

- **Email Notifications:**
  - User Notifications



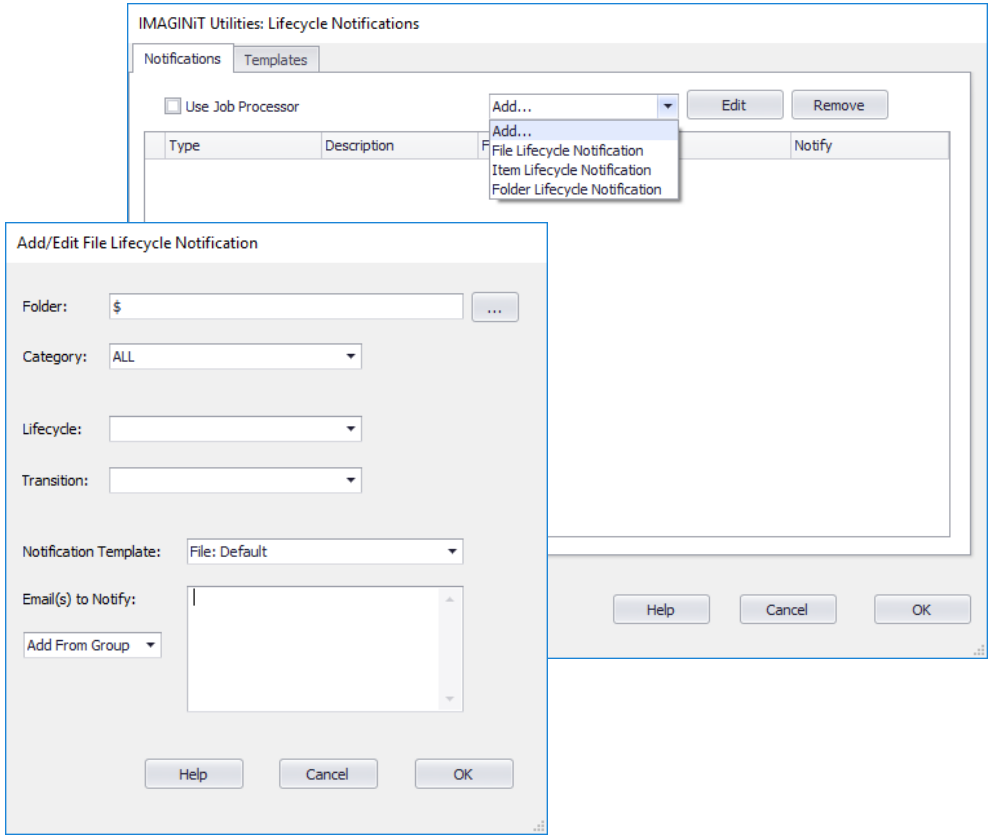
Lifecycle Notifications

- **Email Notifications:**
  - Simple method for automatically notifying stakeholders of a lifecycle event change.
  - Works with Items, Files, and Folders



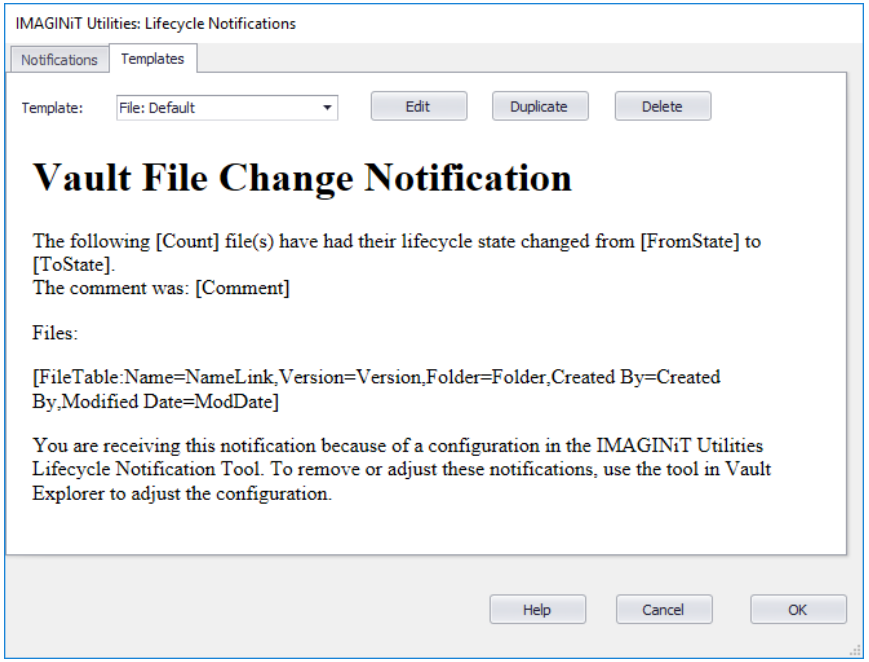
Lifecycle Notifications

- **Email Notifications:**
  - Determine which folders to effect.
  - Specify which category's are effected
  - Specify the Lifecycle and the transition the notification will respond to.
  - Select from a list of notification templates



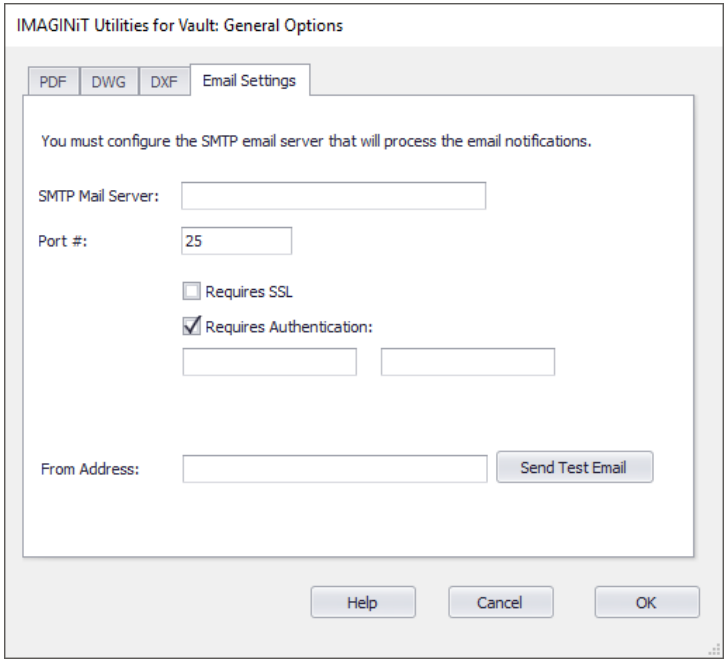
Lifecycle Notifications

- **Email Notifications:**
  - Modify the notification and save as a custom template



Lifecycle Notifications

- **Email Notifications:**
  - Email setup



Methods for Deploying Updates Complete!

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Knowledge Gained

- VAULT CONFIGURATION

Learn how to custom aspects of Vault to better support standards management

- WORKFLOW OVERVIEW

Discover workflows for modifying, testing, and deploying standards

- PRODUCT CONFIGURATIONS

Learn how to configure some Autodesk products to look at Vault for the latest standards

- DEPLOYMENT METHODS

Learn how to set up workflows to automate rapid deployments of standards

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