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Configuring Autodesk® Vault Basic 2023

—— Theory + Exercises ——

Creating a Vault Folder Structure and
Defining important Settings

Security - Creating a Structure of Users
and Groups

Properties and Revision Tables in
AutoCAD and in the Inventor Program

Purging Versions, Deleting Files and
Removing Reservation

Configuring

Autodesk[®]

Vault Basic 2023

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PREFACE

Autodesk® Vault is the file management system from Autodesk. It can be used in many application programs from Autodesk, such as the Inventor program. Basically, the file management system consists of a Vault Server and several Vault Clients.

The Vault Server is installed on a Windows Server. The Vault Clients are installed on the workstations of the users. The files are permanently stored and managed on the Vault Server. For use in the application programs, the files are copied to the local workstations. This is called "checking out". After editing, the files are copied back to the server. This is called "checking in".

The main advantage of checking files out and in is that on the one hand they are managed securely on a server and on the other hand they can be processed quickly on the local workstations.

Autodesk® Vault is currently available in the two editions "Vault Basic" and "Vault Professional".

Vault Basic is already included in the delivery of most Autodesk application programs. Although "free", several essential file management tasks can already be performed with this program. On the one hand, these are mainly the secure storage of files, extensive sort and search commands, and the display of the use and reuse of files. On the other hand, for example, the important commands for renaming and copying files are available in Vault Basic.

Vault Professional contains all objects and commands of Vault Basic. In addition, this "paid" edition offers automatic number generation, the revision system, lifecycle management, item and bill of materials management, and, for example, read-only access to the Vault Server via a web browser (thin client) by any number of users without additional licenses.

When choosing one of the two editions, it should be considered that the data from Vault Basic can always be migrated to Vault Professional without any loss. Conversely, however, data can only be transferred from Vault Professional to Vault Basic with greater loss.

It should also be noted that mixed forms of the two editions are not possible. For example, a Vault Basic client cannot access a Vault Professional server.

When explaining the commands of the Autodesk® Vault, a basic distinction can be made between commands for "Configuring" and commands for "Using". Both types of commands are generally performed by different users with different permissions.

The commands for "Configuring" are generally performed by "Administrators" and the commands for "Using" are performed by "Users". In order to provide both "Administrators" and "Users" with contiguous areas of explanations, two separate books have been created.

The current book describes the commands for "Configuring Vault Basic". However, for a better understanding of the commands, it is assumed that the "Using Vault Basic" book is also available.

The two books are closely coordinated. On the one hand, it is recommended that before working through a section in the "Configuring" book, you should have a quick look through the corresponding section in the "Using" book, since general aspects of the Vault are explained only in the "Using" book. On the other hand, after working through a section in the "Configuring" book, the exercises in the corresponding section in the "Using" book should also be carried out step by step.

I wish you much success in working with the Autodesk® Vault Basic software.

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SPECIAL CONVENTIONS AND ABBREVIATIONS

To simplify notation and to improve clarity, the following conventions and abbreviations are often used in this book.

Text example in the book	Action to be performed
Ribbon/Vault/File Status/Check In <Check In>	Select the "Check In" command (in the Inventor program) by clicking with the left mouse button the icon in the "Ribbon" on the "Vault" tab in the "File Status" group (Abbreviation: angle brackets)
Browser/.../Vault/Check In [Vault/Check In]	Select the "Check In" command (in the Inventor program) by clicking with the right mouse button (context menu) - either: a file in the "Model browser" and selecting "Vault" and "Check In" - or: a file in the "Vault browser" and selecting "Check In" (Abbreviation: square brackets)
.../RMB/...	Press the right mouse button on any object (Right-click any object)

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1. PART 1

Main Topics

- Basic settings
- Security - Creating a structure of Users and Groups

Note: Downloading the Exercise Files from the Internet

At the beginning, the exercise files belonging to the "Configuring" and "Using" books should be copied to the local computer or the network. Please do the following:

- Download a ZIP file from the Internet
 - Go to the main web address of the Vault books: www.armin-graef.de/Book-Vault.aspx
 - Select the link there at the end of version 2023: Download: Course_Vlt2023.zip
 - Save the file in any folder on the local computer or the network
- Extract the downloaded ZIP file
 - After downloading, extract the ZIP file to any folder (e.g. to "C:\")
 - Only one main folder ("Course") with some subfolders and files is created.

As already mentioned in the preface, the commands for "Configuring" are mainly described in this book and the commands for "Using" are described in the "Using ..." book.

To make it easier to assign the various commands in the "Configuring ..." book to those in the "Using ..." book, the books have additionally been divided into two "parts", with each "part" forming a chapter.

Within each "part", it is then relatively easy to identify which commands for "Configuring" belong to which commands for "Using" and are necessary for them.

Especially in chapter "Part 1", it becomes apparent that only a relatively small number of actions for "Configuring" are necessary in order to carry out a relatively large number of actions for "Using".

Before working through a "part" step by step in the "Configuring ..." book, you should have a quick look through the corresponding "part" in the "Using ..." book. Mainly this is recommended because general aspects of the Vault or further explanations for both books are only explained in the "Using ..." book.

After working through a "part" in the "Configuring ..." book, generally the corresponding "part" in the "Using ..." book should also be carried out step by step.

Note: Prerequisites

Regarding the Vault Server, the following prerequisites are assumed:

- either a complete ADMS (Autodesk Data Management Server) is available for testing
 - then both "Global Settings" and "Vault Settings" can be carried out
- or only an empty Vault is available for testing (next to another "live Vault" ("productive Vault"))
 - then the "Global settings" must be agreed with the "Administrator" of the ADMS
- or only a "live Vault" within a company is available
 - then, in general, no settings may be made
 - then, however, various analyses can be carried out according to the following sections (if possible, some of the exercises should also be performed in this process).

Regarding the Vault Clients, the following prerequisites are assumed:

- the Vault client software has been installed on each workstation
 - the Autodesk "Vault Explorer" and e.g. the "Inventor Vault Add-In" or the "AutoCAD Vault Add-In".

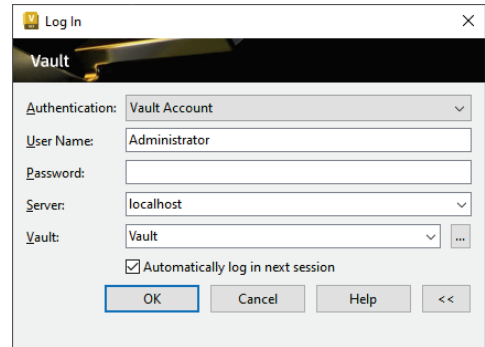
1.1 BASIC SETTINGS

FIRST LOGIN TO VAULT EXPLORER

Exercise:

Do the following:

- Launch Vault Explorer (via the icon on the desktop or via the Windows Start menu)
 - Program: *Start/.../Autodesk Data Management/Autodesk Vault Basic 20...*
- Fill out the *Log In* screen (when Vault Explorer is started for the first time or if the automatic login was switched off)
 - Authentication: "Vault Account" or "Autodesk ID"
 - "Windows Account" is only possible in Vault Professional
 - User Name (if "Vault Account"): Administrator
 - or the own user name
 - Password (if "Vault Account"): is initially blank
 - or the own password
 - Server: localhost
 - if the "Vault Server Software" has been installed on the current computer, "localhost" can be entered; otherwise the name or IP number of the server must be specified
 - Vault: e.g. "Vault" (can be searched for via the "..." (three dots; ellipsis) button)
 - a "live Vault" within an organization should have a unique name, as multiple Vaults may be combined on a single Vault Server "at some point in the future"
 - the name of a Vault cannot be changed anymore by default
 - Automatically log in next session: On
 - if later another user is to be logged in, this can be done via the "File menu/Log Out" in Vault Explorer.

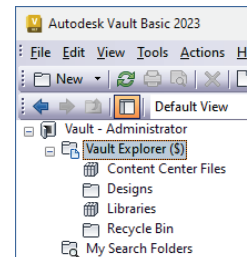


CREATING A BASIC FOLDER STRUCTURE IN THE VAULT

Exercise:

Do the following in Vault Explorer:

- Create a minimal folder structure for working with Inventor files (according to the folder and project structure of the so-called "Autoloader")
 - Create two library folders
 - Command: *Vault Explorer (\$) /RMB/New Library Folder...*
 - Folders: Content Center Files, Libraries
 - Create one Non-library folder
 - Command: *Vault Explorer (\$) /RMB/New Folder...*
 - Folder: Designs
- Create another folder
 - Command: *Vault Explorer (\$) /RMB/New Folder...: Recycle Bin*
 - for storing files and folders that are no longer required by the "User" and are to be deleted by the "Administrator".



CREATING AND SELECTING THE SO-CALLED WORKING FOLDER

The "Working Folder" is the topmost folder for the Vault on each workstation. On the one hand, the working folder is now set on one workstation for adding an Inventor Vault project. On the other hand, the working folder is then subsequently set uniformly for all workstations (all clients).

Exercise:

Do the following in Vault Explorer:

- Create the "Working Folder" within the Windows Explorer (or when subsequently selecting the "Working Folder" in Vault Explorer)
 - Folder (e.g.): C:\Vault
- Select the "Working Folder" in Vault Explorer
 - *Vault Explorer (\$) /RMB/Details.../General tab*
 - *Working Folder/Change... button...: C:\Vault*

