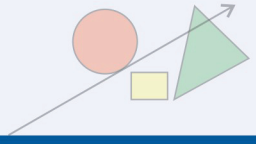

Armin Graef

Using Autodesk® Vault Basic 2023

Theory + Excercises

- Structured Storage of Files
- Extensive Sort and Search Commands
- Displaying the Use and Reuse of Files
- Easy Renaming and Copying of Files
- Simplified Revision Management in AutoCAD and in the Inventor program

Using

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 "Using Vault Basic". On the one hand, the book is particularly suitable for understanding these commands if the settings have been previously made according to the "Configuring Vault Basic" book. On the other hand, the current book is also very suitable for many other configurations with similar settings.

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

Armin Graef

Internet: www.armin-graef.de

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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Author: Armin Graef
Internet: www.armin-graef.de

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1. PART 1

Main Topics
- Introduction
- Adding files to the Vault and customizing the user interface
- Sorting, Filtering, Grouping and Searching
- Vault status icons in Vault Basic
- Short descriptions of basic user commands
- Commands in the Inventor program and in Vault Explorer
- Commands in the AutoCAD program and in Vault Explorer
- Commands in Vault Explorer
- Further commands

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 of the Autodesk Vault can be divided into commands for "Configuring" for "Administrators" and commands for "Using" for "Users".

A separate book has been created for each type of commands.

Mainly the "Configuring" of Autodesk Vault is described in the "Configuring ..." book. Partly, however, the "Using" is also described when "higher" rights are required for the respective commands.

Mainly the "Using" of Autodesk Vault is described in the current "Using ..." book. Partly, however, the "Configuring" is also described if "no higher" rights are required for the respective commands.

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".

The assignment of a command to the "Configuring ..." book or to the "Using ..." book depends on whether the following permissions are sufficient to perform the command
(see also the "Configuring ... " book in the "Part 1/Security - Creating a structure of Users and Groups" section):
- Permissions of the role "Document Editor (Level 1)" and additionally "File Rename" and "File Move".

If these permissions are sufficient, the command is explained in the "Using ..." book. If further permissions are required, the command is explained in the "Configuring ..." book.

Note
The commands in the "Configuring ..." book are also sometimes referred to as "Administrator commands". However, this is a simplification.
More precisely, the commands in the "Configuring ..." book would have to be designated as commands "that require additional permissions than those specified above".

Required configurations
In the following, it is assumed that at least the following configurations have been carried out after a Vault Basic installation:

- Creating a basic folder structure and an Inventor project file to work with the Vault
- Creating a user (e.g. "Designer1") and adding the role "Document Editor (Level 1)" and further permissions to rename and move files to this user.

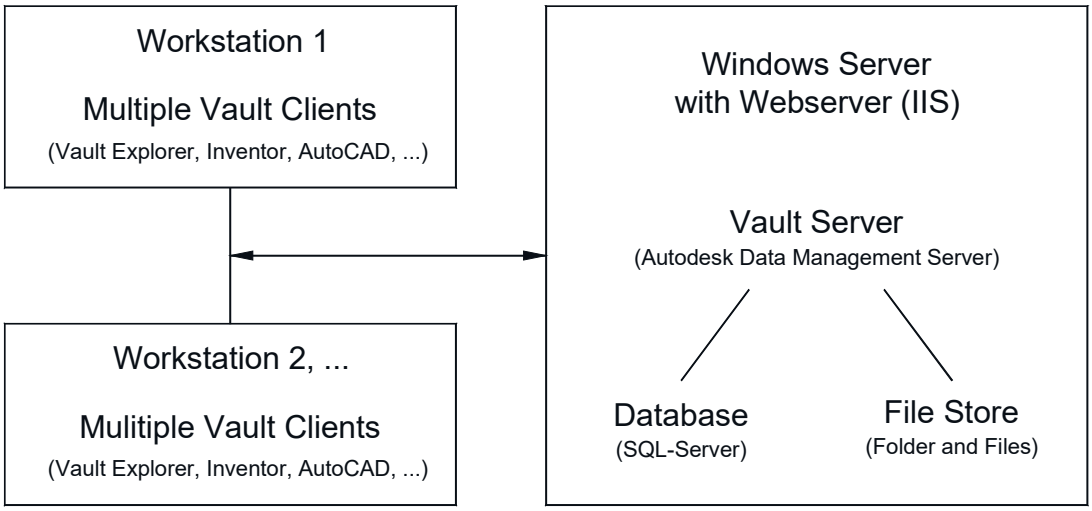
1.1 INTRODUCTION

THE BASIC COMPONENTS OF THE AUTODESK VAULT SOFTWARE

Autodesk® Vault is the file management system of Autodesk. Basically, the file management system consists of a Vault Server and multiple 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 user programs, the files are copied to the local workstations. This is called "checking out". After processing the files, they are copied back to the server. This is called "checking in".

The graphic below shows the basic components of the Autodesk Vault software.



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

Note
The word "Vault" is used on the one hand as a "short name" for various components of the "Autodesk Vault Software" (e.g. "Vault Explorer" or "Vault Server"). On the other hand, the word "Vault" is also partly used for a database within the "Vault software". Additionally, a specific "Vault" is often given the name "Vault". The different meanings should not be confused.