

CADstudio Vault Tools

Version 1.2.6

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1 General

The add-in *CAD Studio Vault Tools* is a set of extension functions for the *Autodesk Vault Workgroup* and *Autodesk Vault Professional* clients.

CAD Studio Vault Tools contains the following modules:

- Copy to workspace
- Easy Changer
- Find Orphaned
- Project Creator
- Vault Publisher Free

2 Installation and uninstallation

2.1 Installation

Run the setup file:

- for the English version „*CADStudioVaultToolsSetup_x64_EN.msi*“,
- for the Czech version „*CADStudioVaultToolsSetup_x64_CZ.msi*“,

If the installation is successfully completed but the *Vault* client does not display menu items of the *CAD Studio Vault Tools* add-in correctly, delete the file „*Menus.xml*“ in the path:
„*%appdata%\Autodesk\Autodesk Vault Professional 2015\Objects*“,
resp.: „*%appdata%\Autodesk\Autodesk Vault Workgroup 2015\Objects*“.

2.2 Uninstallation

You can uninstall this add-on application with the standard *Windows* tools or by rerunning the setup and using the option „*Uninstall*“.

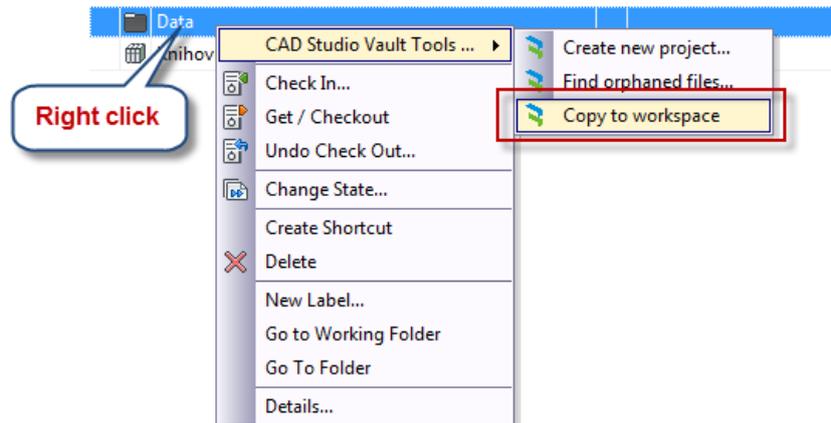
3 Copy to workspace

The module *Copy to workspace* creates a copy of the selected folder structure in *Vault* to your workspace folder.

This function is available on a folder in the project browser.

3.1 Usage

Click on the root (topmost) folder which you want to copy (incl. subfolders) to the workspace and choose „*Copy to workspace*“ from the menu „*CAD Studio Vault Tools*“.



The selected folder and its subfolders will be copied to your workspace folder.

4 Easy Changer

The module *Easy Changer* is an extension of the existing *Vault* functionality and helps in quick changes of the document settings. With a single click you can automatically change:

- Document category,
- Revision schema and revision index settings,
- ECO process (approvals),
- Adding properties according to the new category and filling properties with default values.

This module can be used in two levels:

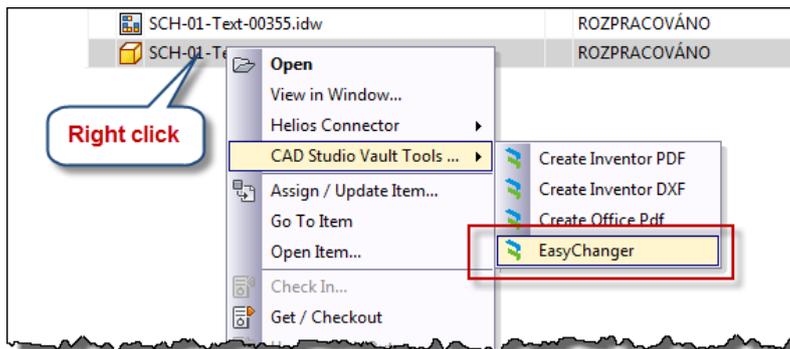
- Custom selection of all changes to be performed,
- Use preset configurations.

4.1 Manual selection

The manual option is preferred in cases when the files are changed in a one-time process and they are of different types.

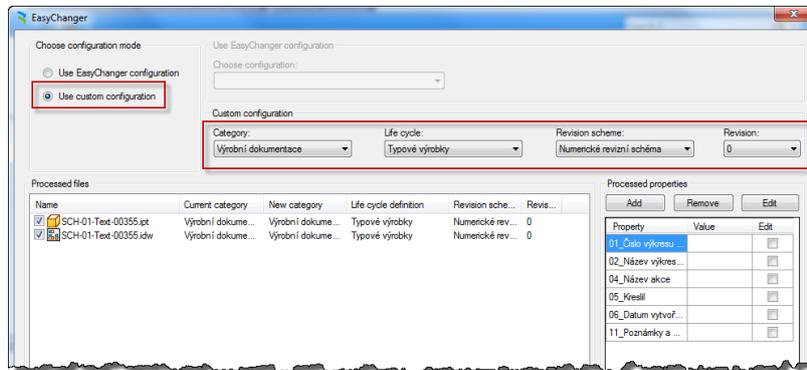
The workflow for manual selection is following:

1. Select the file (or files) on which you want to change the category



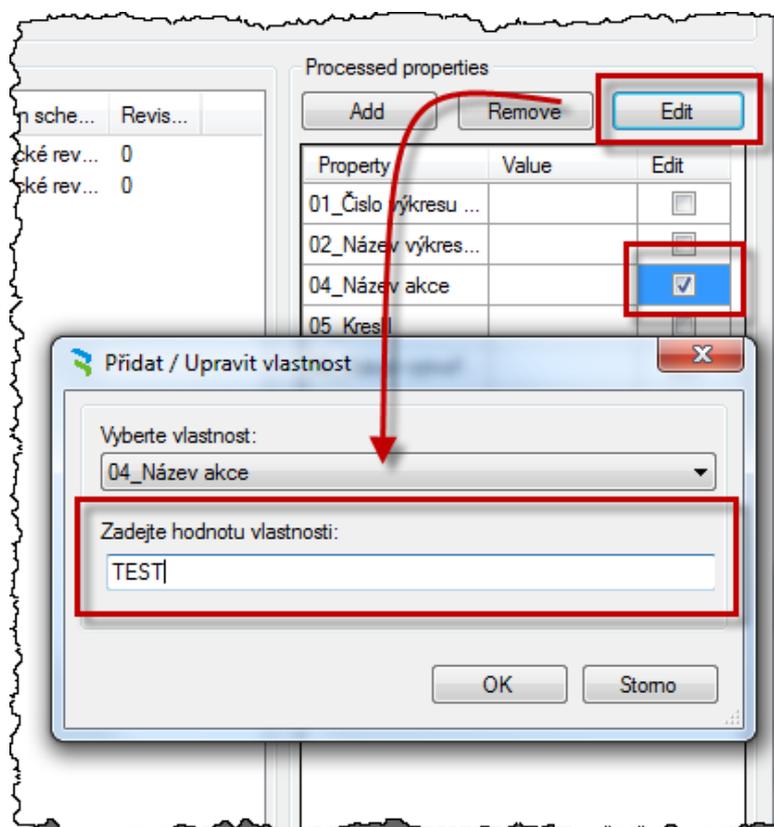
In the *EasyChanger* dialog, choose „Use custom configuration“ and sequentially select the new:

- a. Document category,
- b. Life cycle,
- c. Revision schema,
- d. Default revision index,



Note: for the selected category, only those life cycles and revision schemes are available, which are defined in the general configuration of *Vault*.

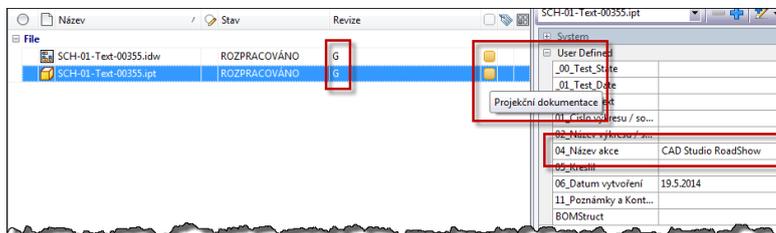
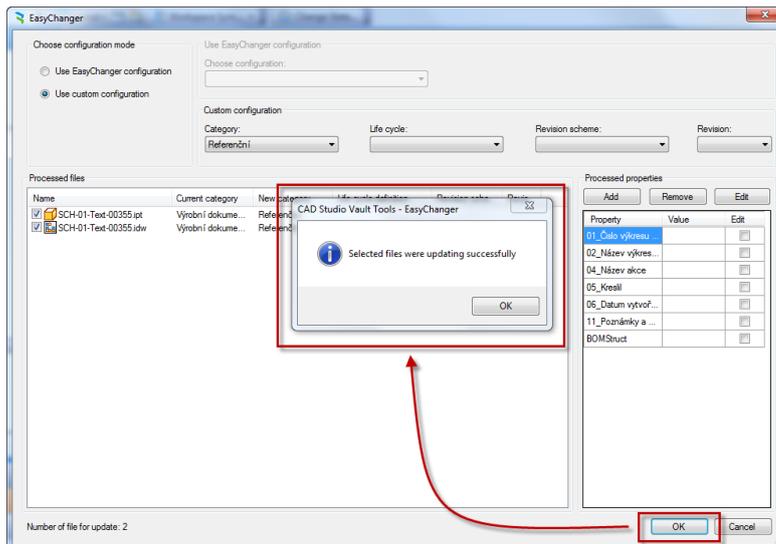
2. In case you also want to fill-in the default value of a property, check the selected property and click the „Edit“ button. Then change its value in the edit window



Note: to delete an existing value of a property, just check the property (-ies) and the value will be filled-in with an empty string.

Similarly, use the „Add“ button to add a new property to the list, originally not associated with the selected category.

3. To confirm the changes, click the „OK“ button.

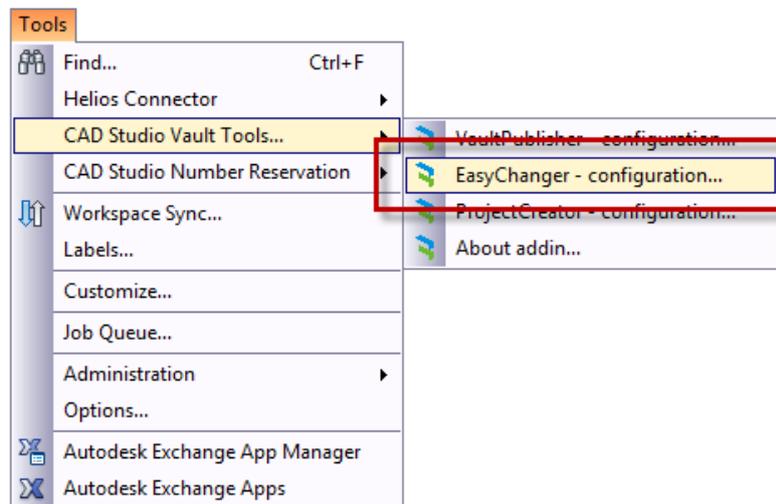


4.2 Using configurations

Configurations are suitable for cases when you repeat the same change of the documents over and over, with the same settings.

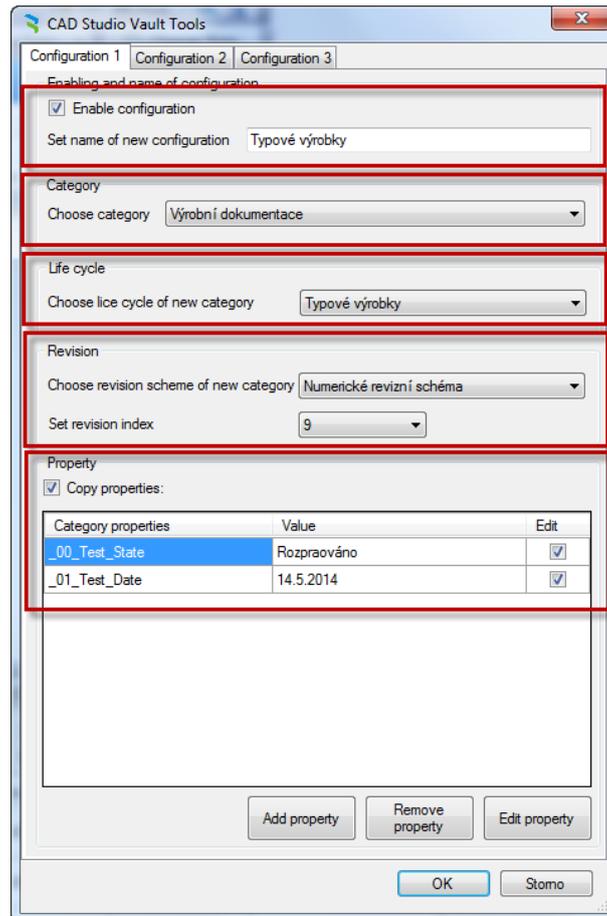
4.2.1 Setting configurations

You need to perform Configuration settings before you can use them. This can be done in the menu „Tools -> CAD Studio Vault Tools -> Easy Changer – configuration“.



In the configuration window, perform sequentially:

- a. Check „Enable configuration“,
- b. Select the name of the configuration (as displayed in menus),
- c. Choose the document category,
- d. Life cycle,
- e. Revision schema,
- f. Default revision index,
- g. Properties and their default values.

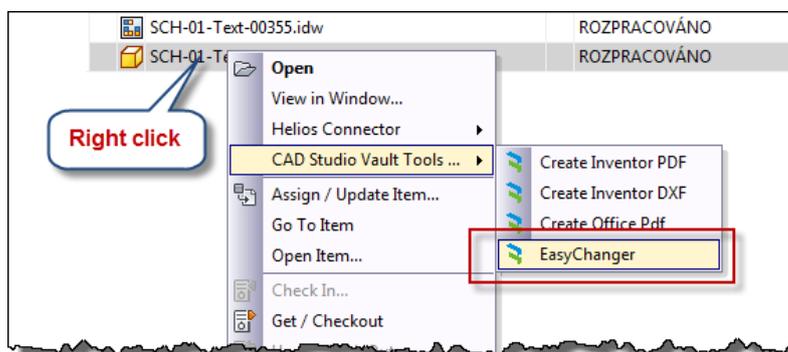


Note: Vault administrator rights are necessary for the configuration settings.

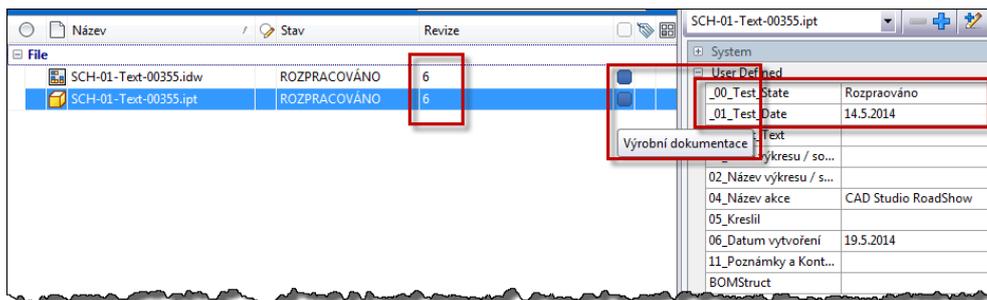
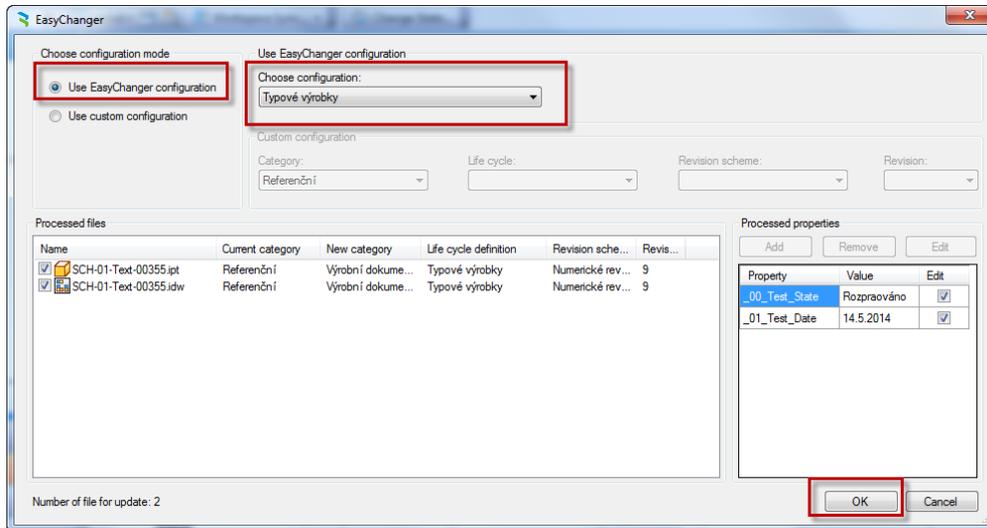
4.2.2 Changing documents with the Configurations option

The document change is similar as with the manual option.

1. Select the file (or files) to change category



- Choose the option „Use configuration“ and select the configuration from the list of enabled configurations.
Continue by clicking „OK“.

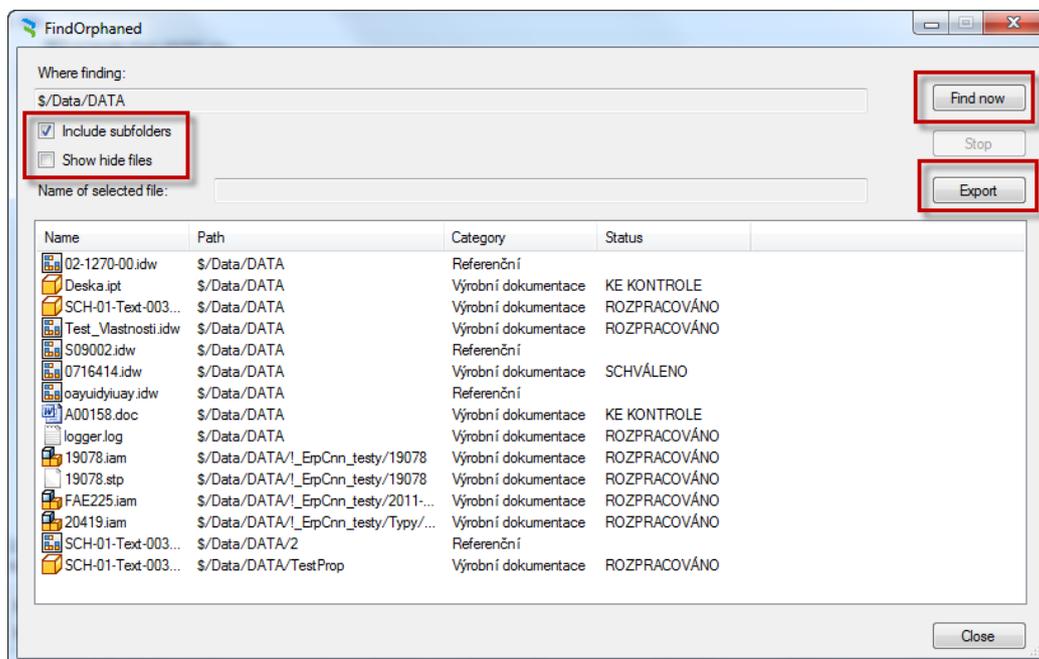
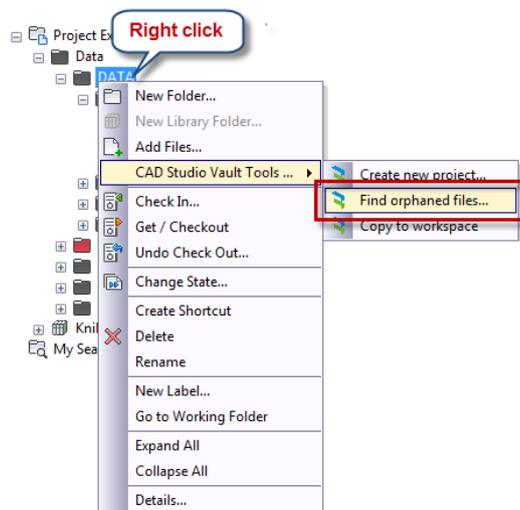


5 FindOrphaned

The module *Orphaned files* for searching of non-associated files is a useful tool for managing the vault repository. It offers a quick and easy to use method for identifying files which are not referred from any other file. So it lists those files, which have no links in the tab "Where used".

5.1 Usage

Run the function by right-clicking on a folder in *Vault* and selecting the item „Find orphaned files“. In the command dialog you can select to include subfolders, hidden files, use a file filter, or export the list of names of the found files (documents) to a text- or CSV file.



6 ProjectCreator

The module *Project Creator* can streamline creating of a folder structure from a predefined template stored in *Vault*. This can accelerate creating new projects of a similar type. You can find this function in the menu under „*Create new project*“. This module can be accessed from:

- The folder structure,
- The items (only in *Vault Professional*),
- The change order (only in *Vault Professional*).

Naming of the project root folder can be done by:

- Custom naming,
- The *Vault* number scheme,
- The item number (only in *Vault Professional*),
- The change order number (only in *Vault Professional*).

To create a new project you can use:

- Manual selection of the template location,
- System selection of the template location.

Other settings for creating a new project are:

- Copy predefined rights on folders,
- Copy folder properties,
- Copy structure of the new project to workspace,
- Include default files to the new project – files stored in the project folder template (all files except Inventor data are copied).

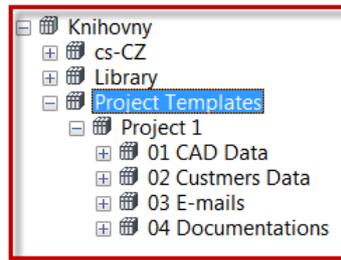
6.1 Template configuration (folder structure)

Create a project folder structure in *Vault* and this structure will function as a project template. It is suitable to create this structure e.g. in the *library* folder, completely outside the standard project data. Of course you can have multiple project templates.

Project templates can also contain properties and rights.

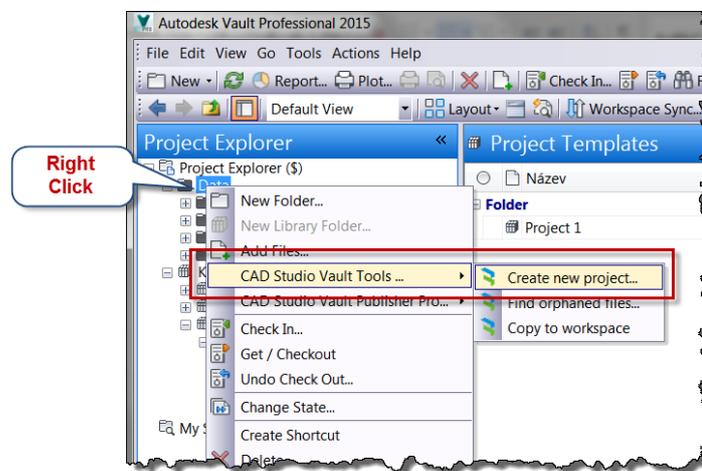
Folders can also contain files, which will be copied over with the folders when a new project is being created.

All files except Inventor files are copied. This limitation is set so that you can use this function also without *Inventor*. For proper copying of Inventor data you need to update references inside assemblies and drawings, and *Inventor* is needed to perform this reference updates inside files.

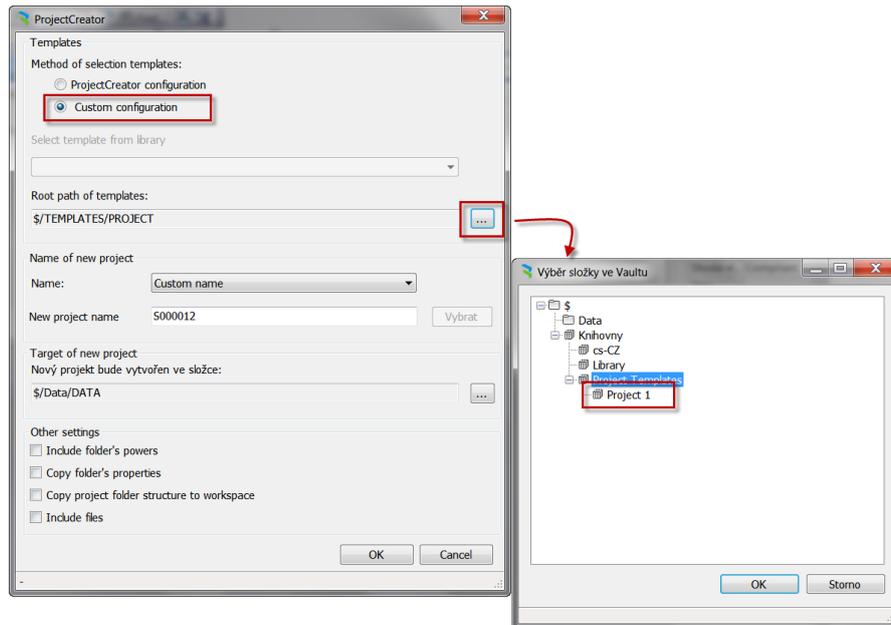


6.2 Manual selection

Right-click on a folder (resp. on an item or on a change order – the target folder will be defined later in these cases), where you want to create a new project folder and choose „CAD Studio Vault Tools - > Create new project...” from the menu.



In the *ProjectCreator* window select „Custom configuration“ of the templates and then select the root path of the templates.

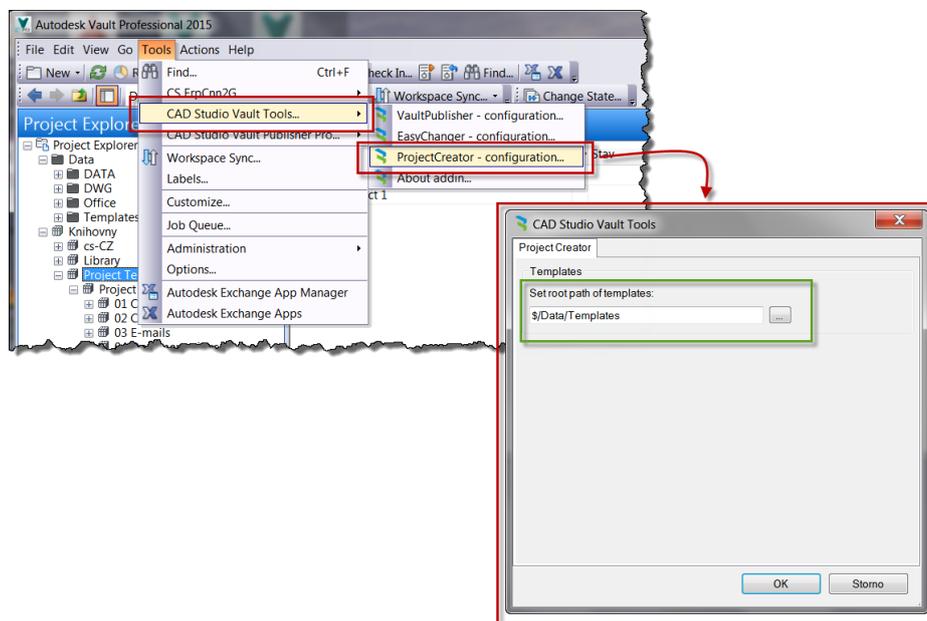


6.3 Using configuration

Using configurations is suitable in cases where a single, common template folder is used for all users in the company.

6.3.1 Setting up configuration

Configuration can be set from the menu „Tools -> CAD Studio Vault Tools... -> ProjectCreator – configuration...“

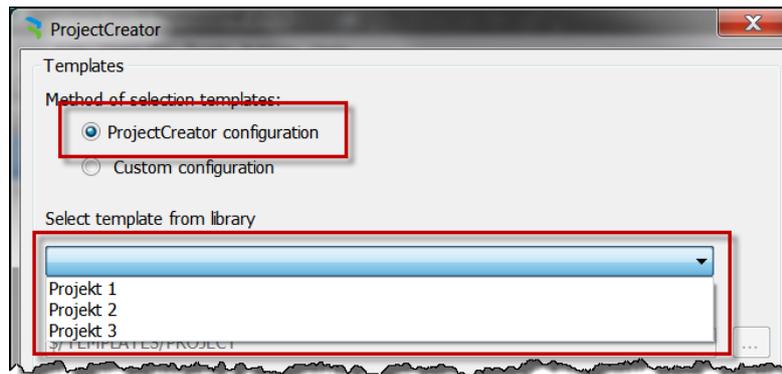


In the configuration window, set the root path in *Vault*, where the project templates are stored.

6.3.2 Creating a project with configurations

Right-click on a folder (resp. on an item or on a change order – the target folder will be defined later in these cases), where you want to create a new project folder and select „CAD Studio Vault Tools - > Create new project...“ from the menu.

In the *ProjectCreator* window select the template option „From configuration“ and from the library select box pick the requested folder template.

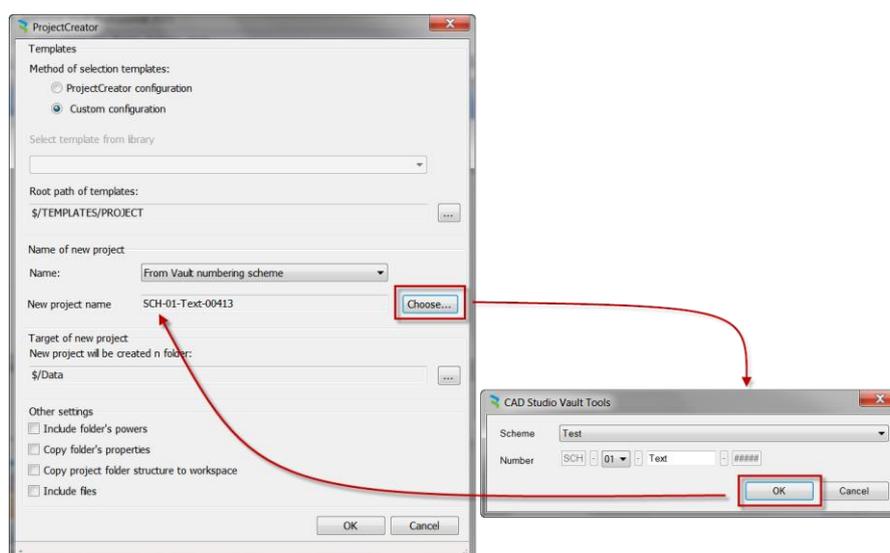


6.4 Other settings

Then choose how the folder will be named:

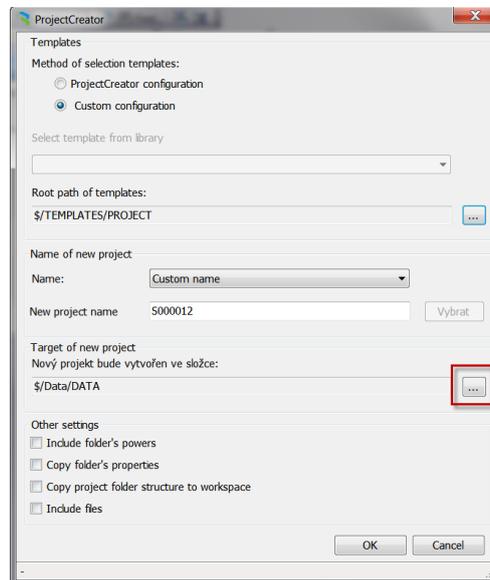
- Custom name,
- From the *Vault* numbering scheme,
- From the item number (only in *Vault Professional*),
- From the change order number (only in *Vault Professional*).

The option „From Vault numbering scheme“ will activate the „Choose“ button, which will (when clicked) display a dialog with the definitions of numbering schemes.

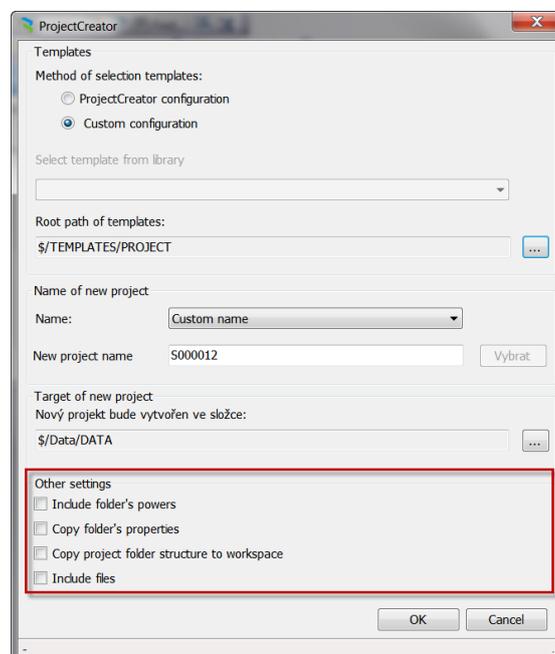


If you run *ProjectCreator* from the items- or change order environments, the new project number is filled in with the item number, resp. the change order number.

Then you can select or change the target folder – where the project will be located.



In the section „*Other settings*“ you can choose whether access rights and properties should be also copied with the new project. Another option is copying the whole newly created project structure to workspace.



You will complete the new project creation with the „*OK*“ button.

7 VaultPublisher Free

The module *Vault Publisher* allows manual or automatic publishing of preview- and publishing *Vault* files in one of the file exchange formats, e.g. in PDF.

Generates:

- PDF files from *Inventor* drawings (*idw*, *Inventor dwg*),
- PDF files *Microsoft Word*, *Microsoft Excel* (*Office*) documents,
- DXF files from *Inventor* sheetmetal parts.

Files are generated from single files. Generating PDF or DXF from an *Inventor* drawing or sheetmetal is possible only on workstations where *Autodesk Inventor* is installed.

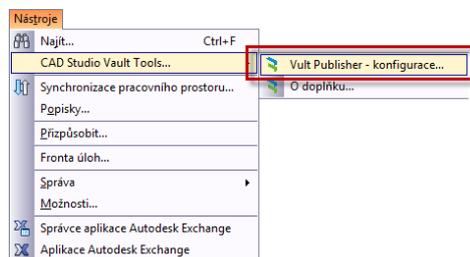
To generate PDF from *Word* and *Excel* you need to have *Microsoft Office* installed.

The generated file is stored to the selected folder – by configuration. It is also possible to add the document revision index to the filename of the generated file.

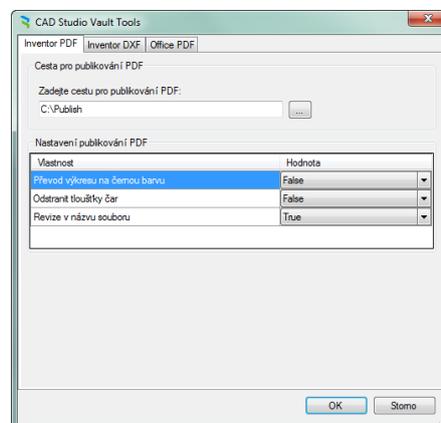
A limited version of this module is included in *CAD Studio Vault Tools* – the full version with wide configuration options and automatic job management can be purchased separately.

7.1 Configuration

The configuration of *Vault Publisher* can be invoked from *Vault* in the menu „Tools -> CAD Studio Vault Tools... -> Vault Publisher – configuration...“

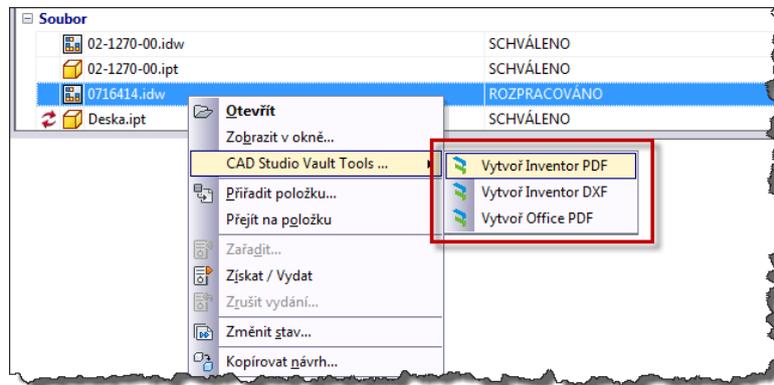


In the configuration window, you need to set the publishing path. Then you can automatically add the revision index to the published file name – as: *[index revision]* – e.g. *A0005432[A]*.



7.2 Usage

Right-click on an *Inventor* drawing, *Inventor* sheetmetal model or *Office* document and choose „CAD Studio Vault Tools... -> Create Inventor PDF“ (resp. „Create Inventor DXF“ or „Create Office PDF“) from the context menu.



The resulting file will be generated to the folder defined in the configuration.