

Categorizing and Managing Standard Content Parts in Vault

How to create a special file category for Inventor Standard Content parts and have them automatically released and locked on the initial check-in procedure.

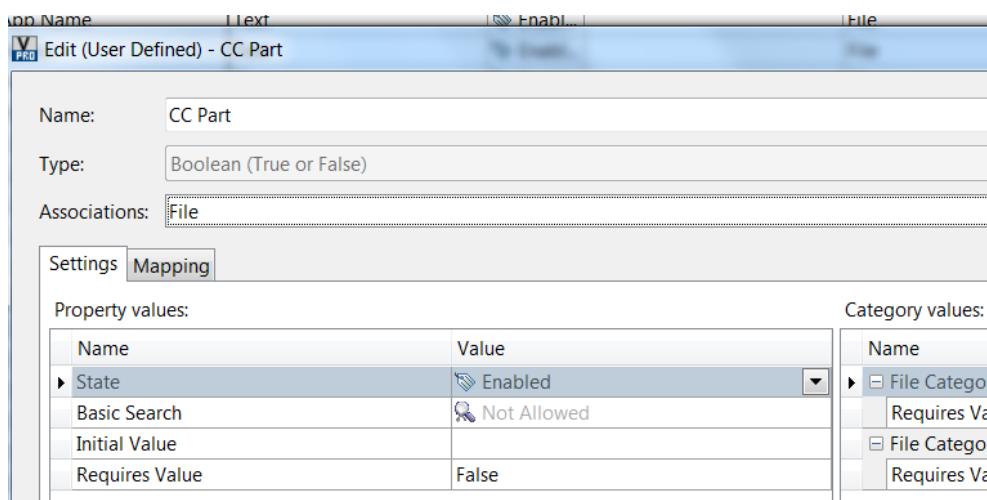
Users of Autodesk Vault Workgroup, Collaboration and Professional.

This document describes how to setup a file category to control and manage Inventor's Standard Content parts in Vault so that they are automatically set to a Released state on check-in.

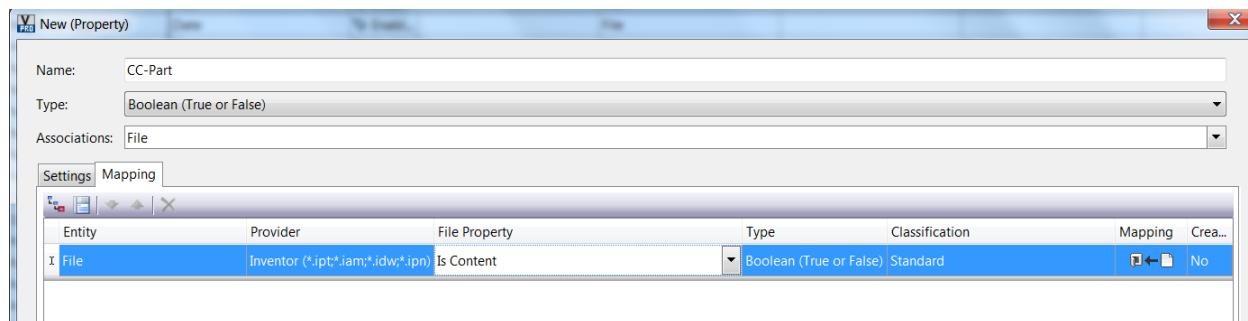
Follow the steps below to setup and test this feature.

Step-1: Create a special property to recognise Standard CC parts

1. Log into Vault with Administrator privileges.
2. Add a new property. Select Tools > Administration > Vault Settings, then select Properties from the Behaviours tab.
3. Create a new property (e.g. CC-Part) set the type as 'Boolean', then set the file association set to the relevant category.

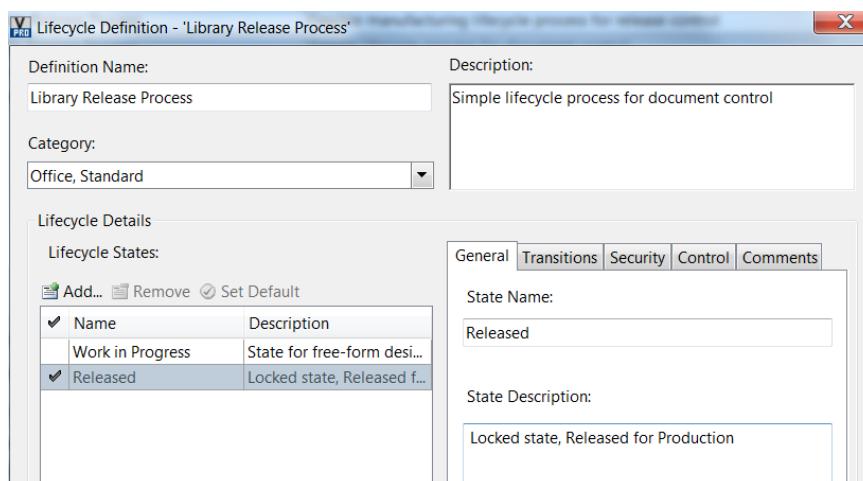


4. From the Mapping tab, add a new map. Entity = File, Provider = Inventor (.ipt, .iam, .idw, .ipn), then for the Import Properties, select a pre-existing Vaulted CC part and use the property 'Is Content'. (Note that this is a Boolean property using *True or False*).

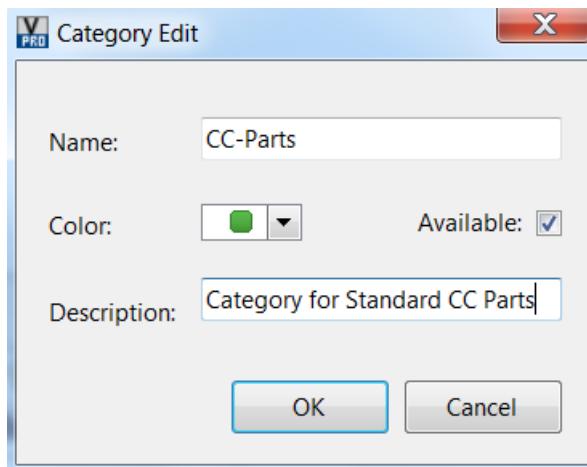


Step-2: Create a special Category to recognise Standard CC parts

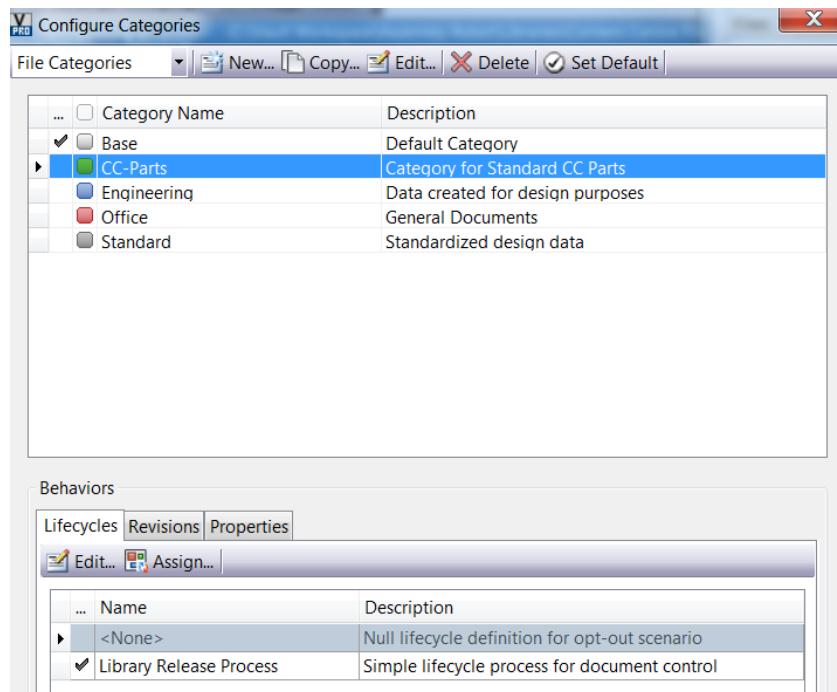
1. Create a new Lifecycle with 'Released' set as default state. (Example below created from copy of Simple Release Process).



2. Create a new Vault File Category for controlling CC parts. From Tools > Administration > Vault Settings, select Categories from the Behaviours tab.
3. From the dialog select File Categories from the drop-down list, then select New. Create a new Category (e.g. 'CC-Parts')



4. For the Lifecycle select (and make default) the new 'Library Release Process'.



The dialog box has two main sections:

Categories (Top half):

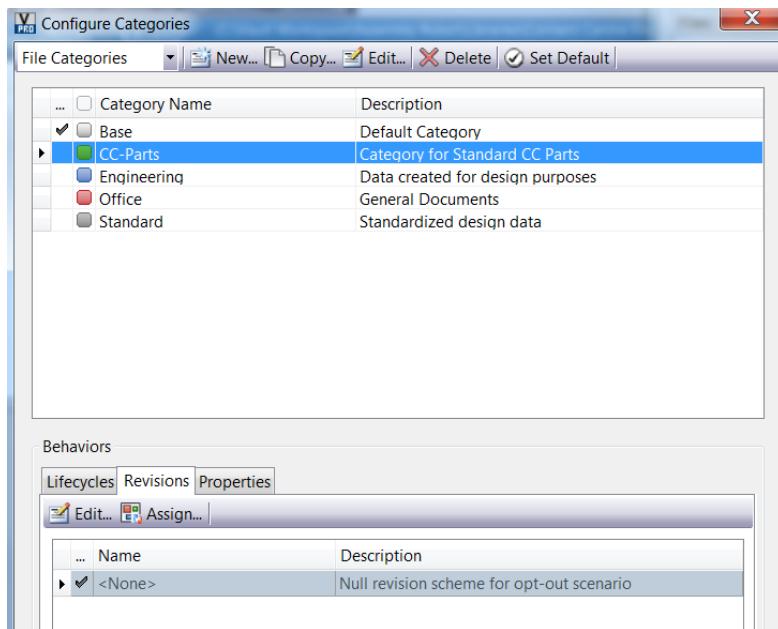
Category Name	Description
Base	Default Category
CC-Parts	Category for Standard CC Parts
Engineering	Data created for design purposes
Office	General Documents
Standard	Standardized design data

Behaviors (Bottom half):

Lifecycles tab selected.

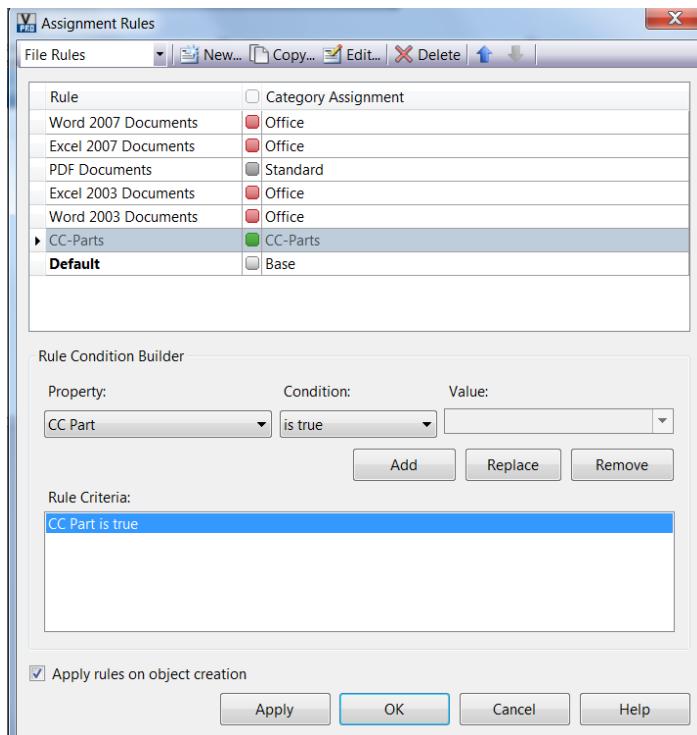
Name	Description
<None>	Null lifecycle definition for opt-out scenario
Library Release Process	Simple lifecycle process for document control

5. For Revisions, remove any scheme leaving '<None>' as default. (This will ensure there is no incumbent scheme as revisions controls are not required).



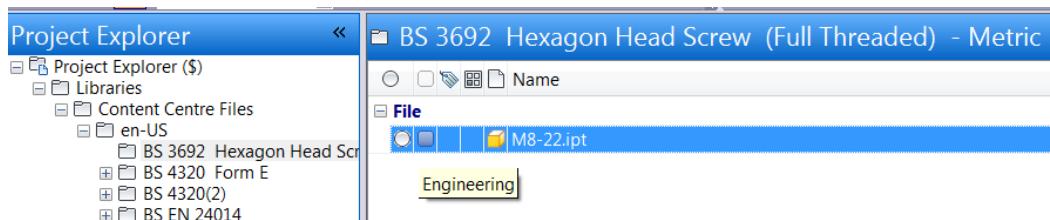
Step-3: Create a Rule to recognise Standard CC parts

1. Create a new Rule for CC-Parts Category.
2. Select and add the property initially created with the condition set as 'is true' (make sure to set the selection to 'Apply rules on object creation').

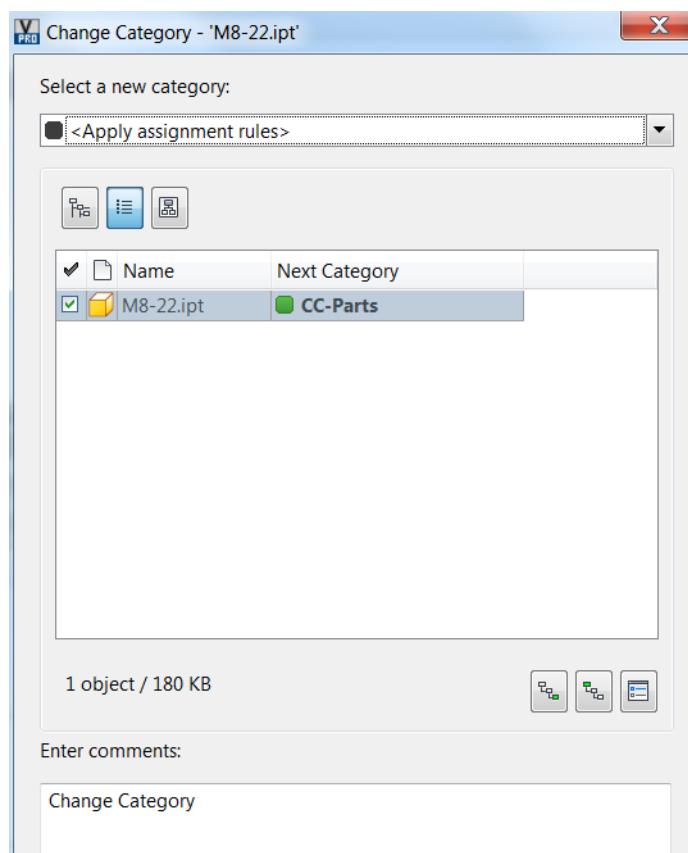


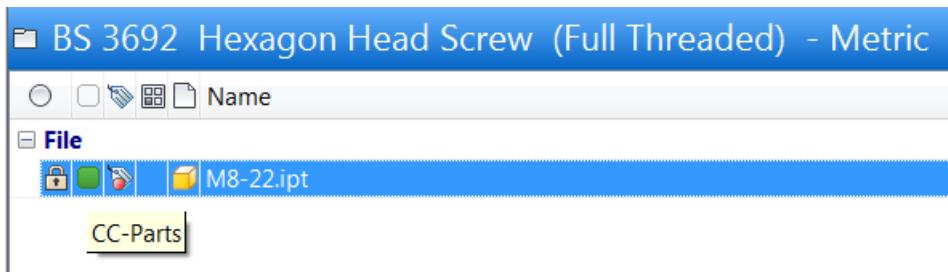
Step-4: Testing the process recognise Standard CC parts

1. Choose an existing CC part that may already be Vaulted showing current Category (Example showing CC part as 'Engineering' Category):



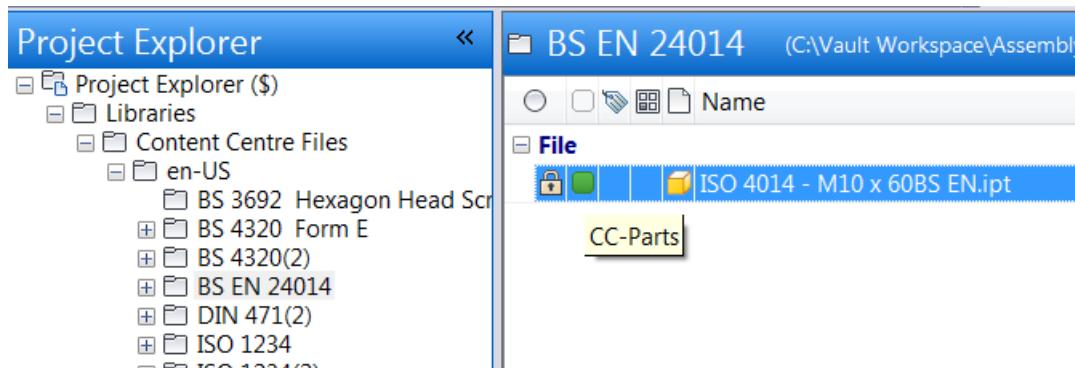
2. Select Change Category, then select '<Apply assignment rules>' from the drop-down selection; this will update the Category to the new 'CC-Part' type.





(Note for files update that were already defined as a different Category, both lifecycle and revision require changing to match CC-Parts Category).

1. Test the check-in for all new CC parts to ensure all new data is correctly categorized and locked:



Happy Vaulting 😊
K.Hyde CADline 19-3-2013