

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.

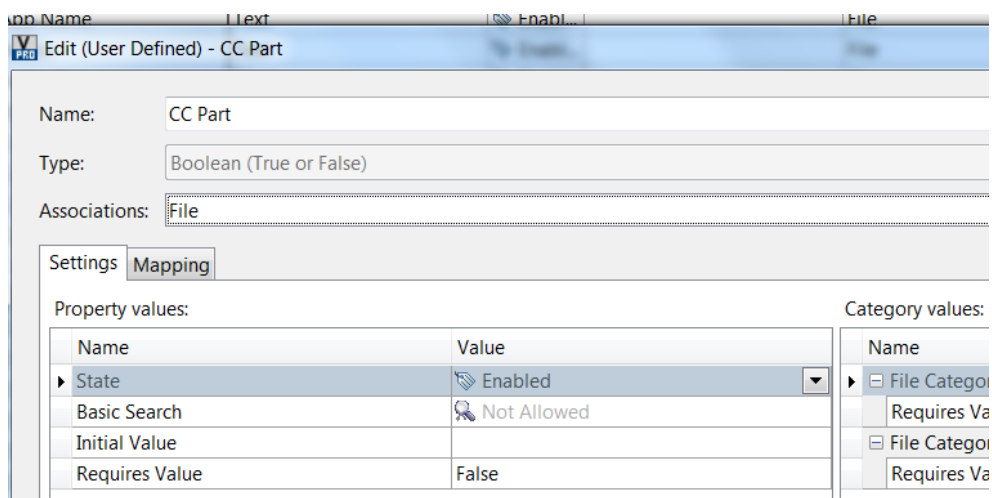
Users of Autodesk Vault Workgroup, Collaboration and Professional.

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

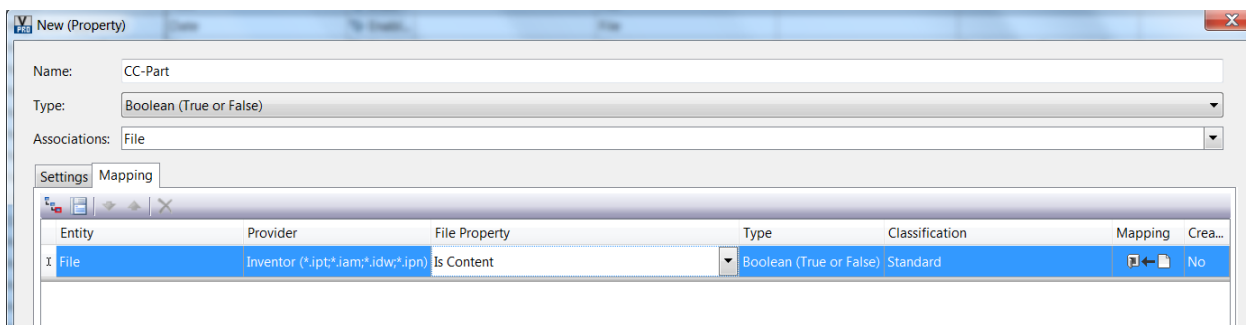
1. Log into Vault with Administrator privileges.
2. Add a new property. Select Tools > Administration > Vault Settings, then select Properties from the Behaviours tab.
3. Create a new property (e.g. CC-Part) set the type as 'Boolean', then set the file association set to the relevant category.



Name	Value
State	Enabled
Basic Search	Not Allowed
Initial Value	
Requires Value	False

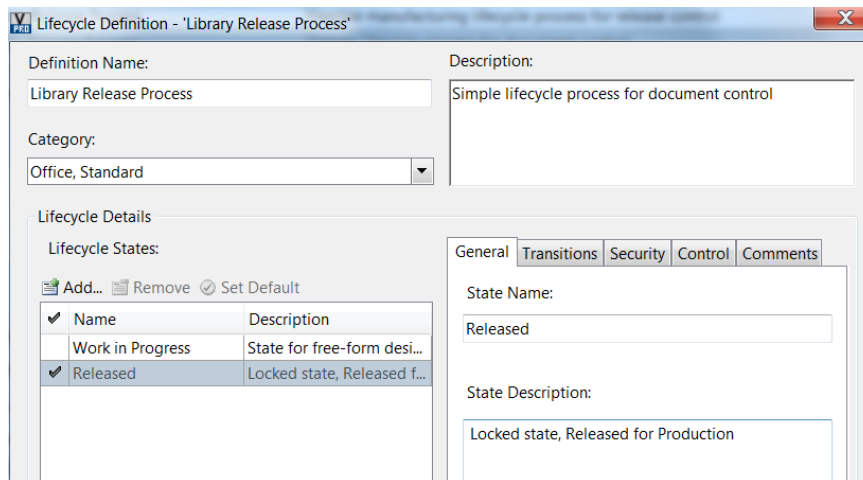
Name
File Category
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File Category
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- From the Mapping tab, add a new map. Entity = File, Provider = Inventor (.ipt, .iam, .idw, .ipn), then for the Import Properties, select a pre-existing Vaulted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

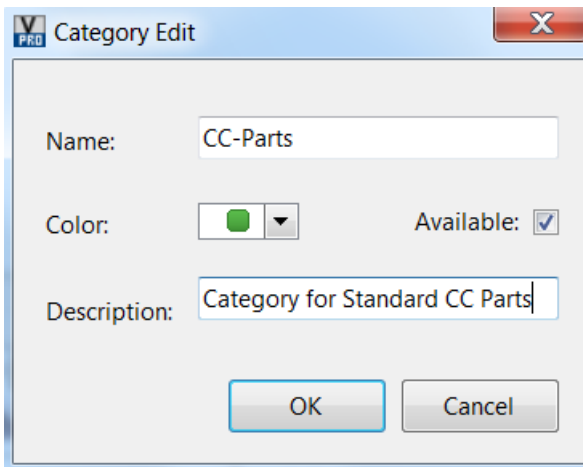


Step-2: Create a special Category to recognise Standard CC parts

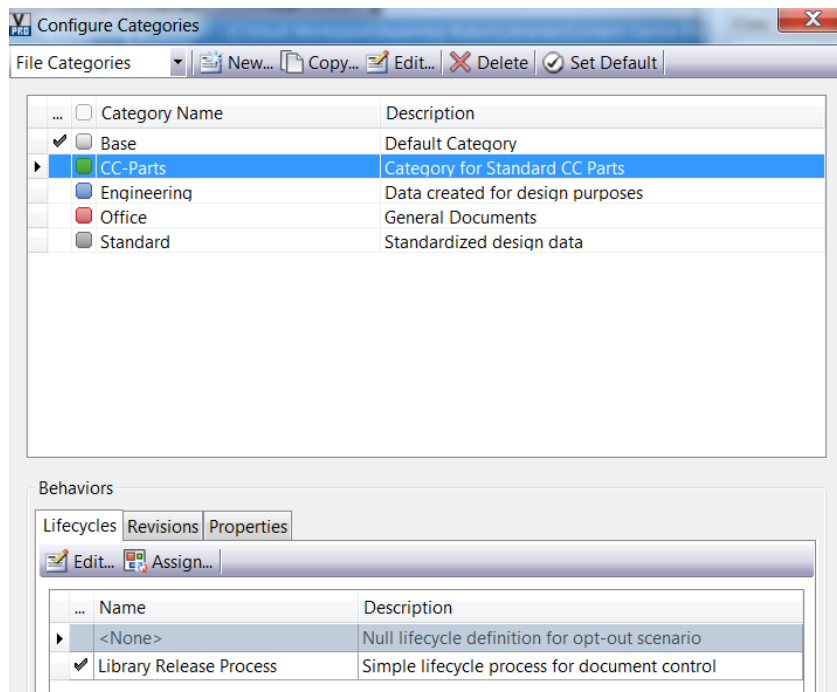
- Create a new Lifecycle with 'Released' set as default state. (Example below created from copy of Simple Release Process).



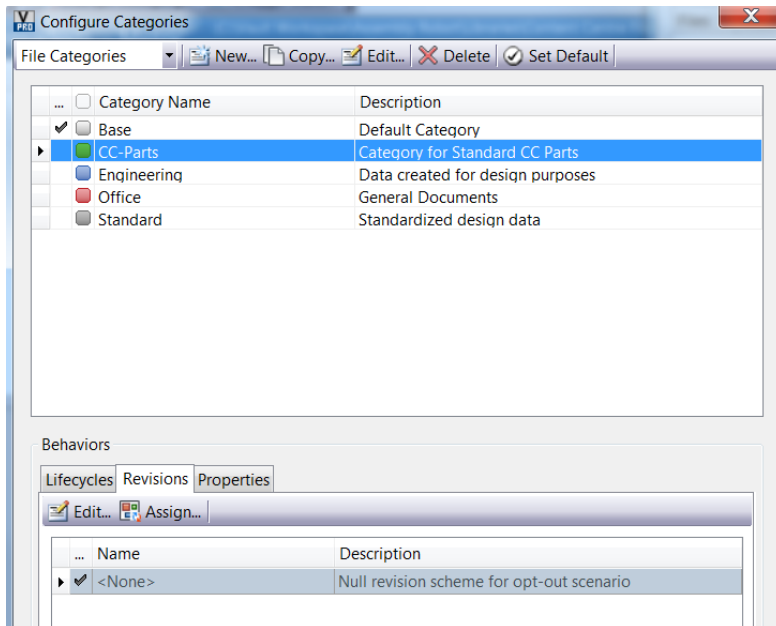
- Create a new Vault File Category for controlling CC parts. From Tools > Administration > Vault Settings, select Categories from the Behaviours tab.
- From the dialog select File Categories from the drop-down list, then select New. Create a new Category (e.g. 'CC-Parts')



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

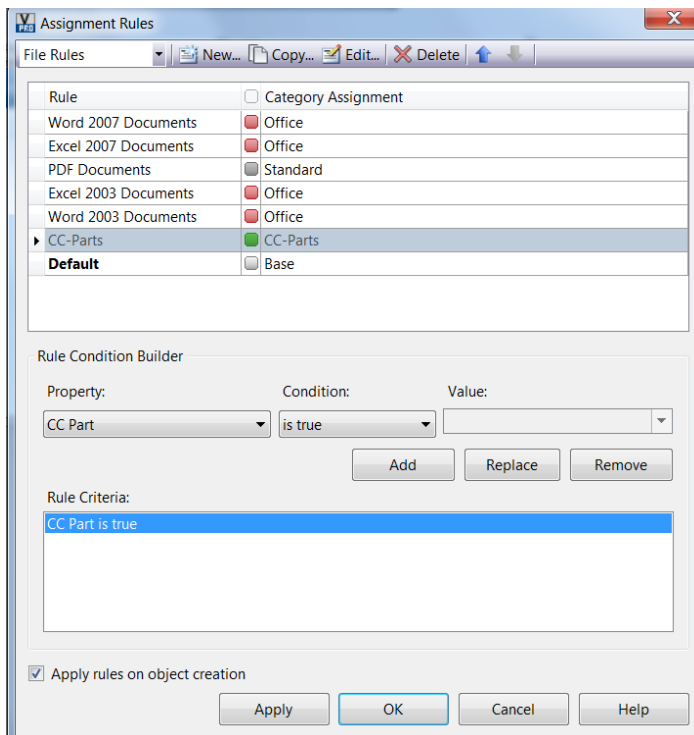


5. For Revisions, remove any scheme leaving '<None>' as default. (This will ensure there is no incumbent scheme as revisions controls are not required).



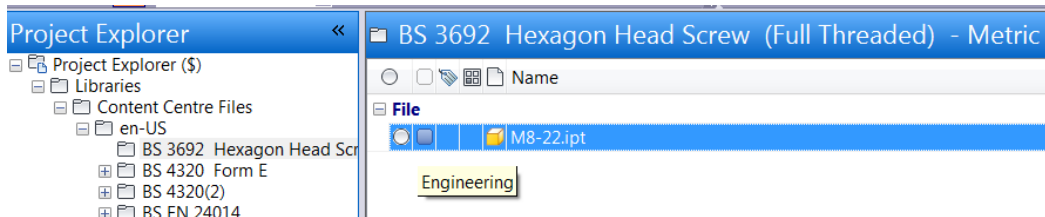
Step-3: Create a Rule to recognise Standard CC parts

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`).

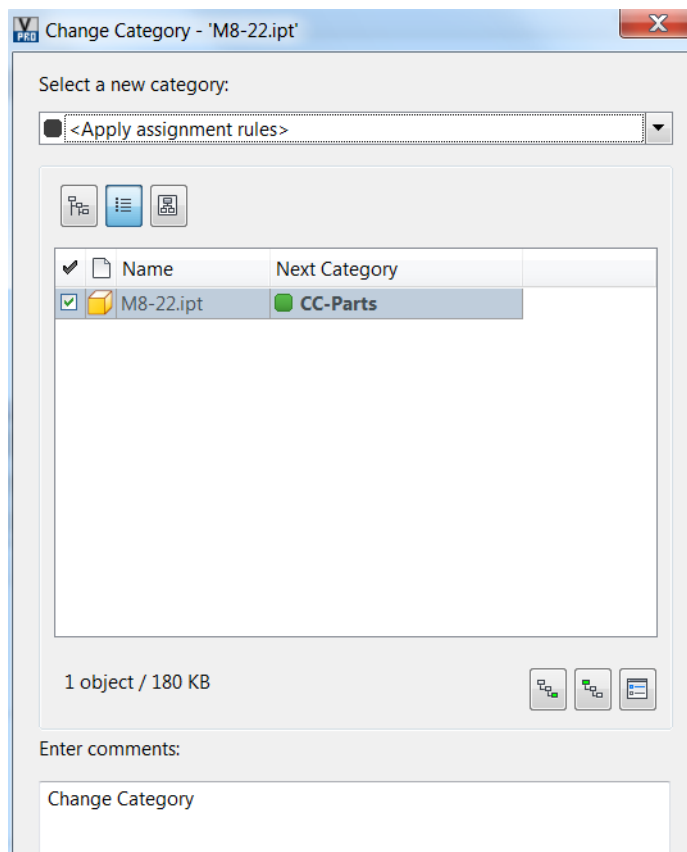


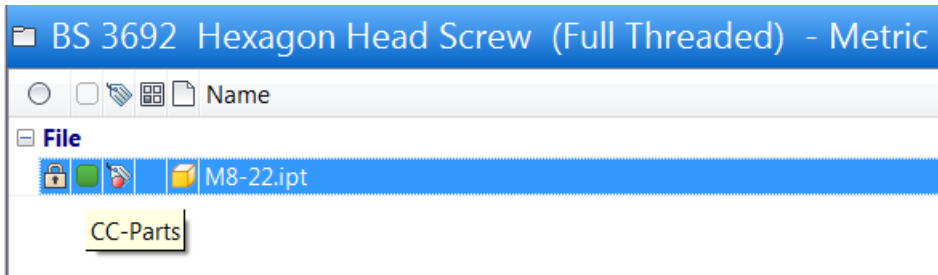
Step-4: Testing the process recognise Standard CC parts

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



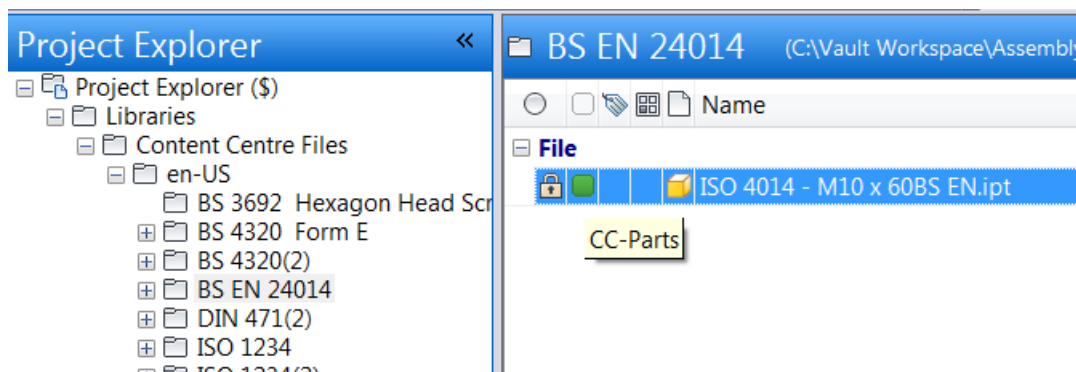
2. Select Change Category, then select '<Apply assignment rules>' from the drop-down selection; this will update the Category to the new 'CC-Part' type.





(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