

# Inventor Vault Environment

This White Paper will guide Inventor users to setup Vault, a workspace and a `Master Vault Project`.

This document is intended for users and Administrators familiar with the operational requirements of Autodesk Inventor and the Autodesk Vault Family products.

This White Paper covers a number of steps that are required to setup Autodesk Inventor to successfully work with all the products currently available in the family of Autodesk Vault, namely Vault 2011, Vault Workgroup 2011, Vault Collaboration 2011 and Vault Professional 2011. Please contact Midas Technology for further information about these and all other Autodesk products.

## Prerequisites

A working installation of one of the Autodesk Inventor family products.  
A working installation of one of the Autodesk Vault family products.  
A working basic knowledge of both Inventor and Vault.

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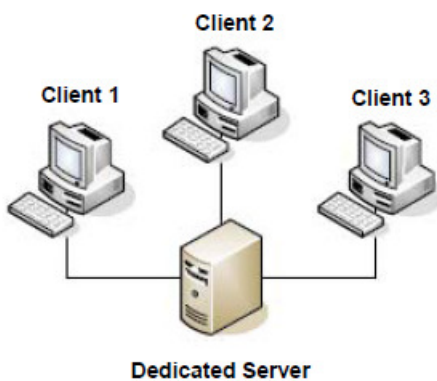
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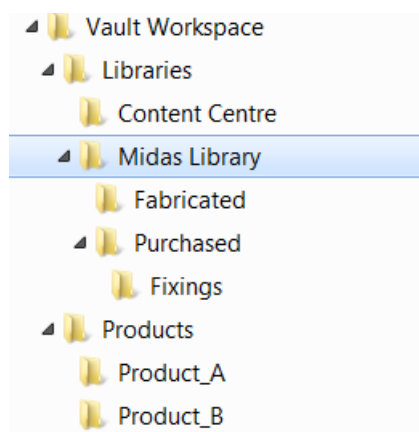
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## Section-1 Creating a Workspace

The first consideration is to create a working area or 'Workspace' that will service both aspects of either adding files to the Vault or editing existing vaulted files. The recommendation is that the Workspace consists of a dedicated folder structure on the workstation local C: drive, however where security issues dictate that files should not be access locally a the workspace can be set to use a server based user area. The local workspace is preferential in reducing network transactions whilst 'checking-in' or 'Checking-out' data. Identical workspaces should be set for each workstation sharing vaulted data, in addition the Administrator can enforce the location of the workspace (details of how to set this appear later in this document).



The following example shows a typical workspace folder which has a primary 'product' folder and primary library folder. Similar structures can be created via Windows Explorer to suite specific company requirements, perhaps using 'Clients' or 'Projects' instead of *Products*.

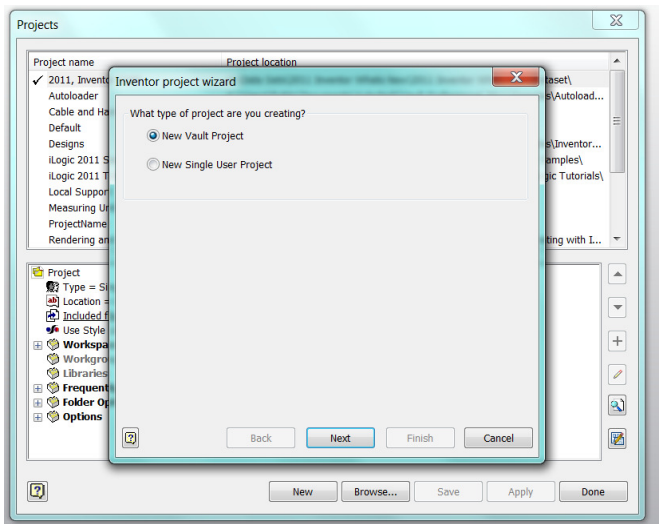


A couple of things to note here is that the primary Products folder would ideally contain data that was unique to the product, and the library folder would contain both parts and assemblies that are common to any product. This method ensures that the data stored in the product folders are kept to a minimum and removes any need to duplicate files.

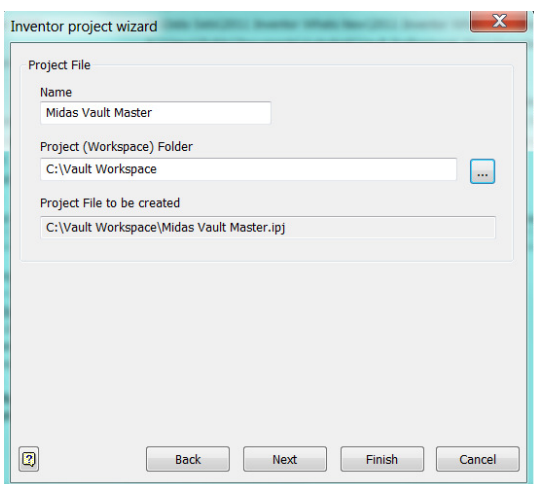
## Section-2 Creating a 'Master' Inventor project file

The next task is to create a 'Master' project that will service all of the data stored within the Vault, removing any need to have individual Inventor projects for each product or job. The location of the .ipj file will be the root folder of the Vault Workspace, the project will then be modified to set the projects workspace to the Products folder and a reference added to include a route to the library location.

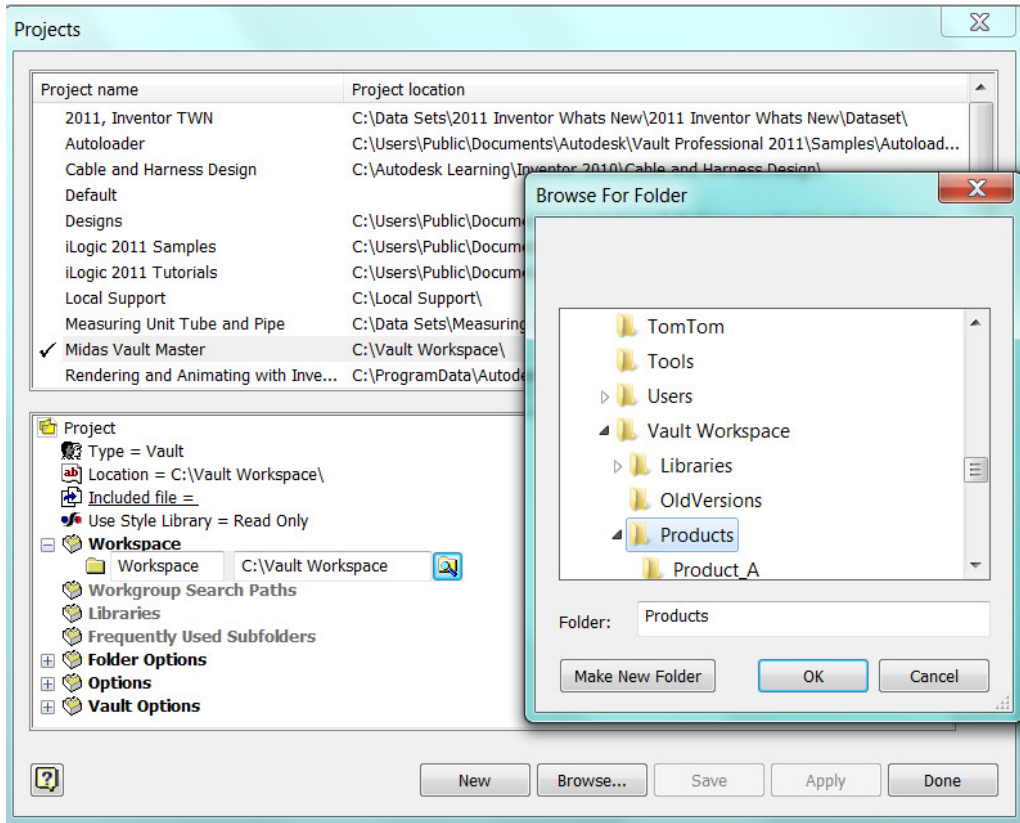
1. Using Projects in Inventor, select the *New* button to create a new Vault project, then select *Next*.



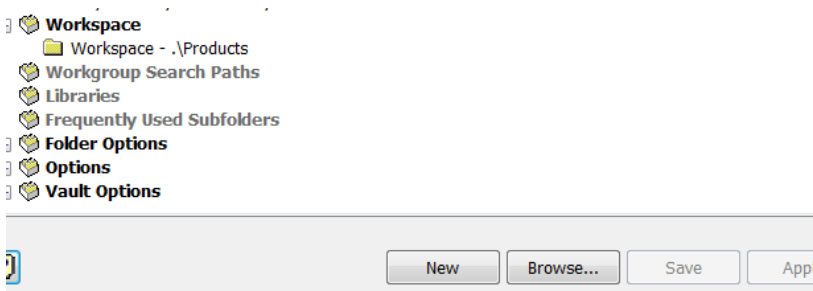
2. Enter a suitable name for the project, and set the location to the Vault Workspace folder via the browse button, then select *Next*.



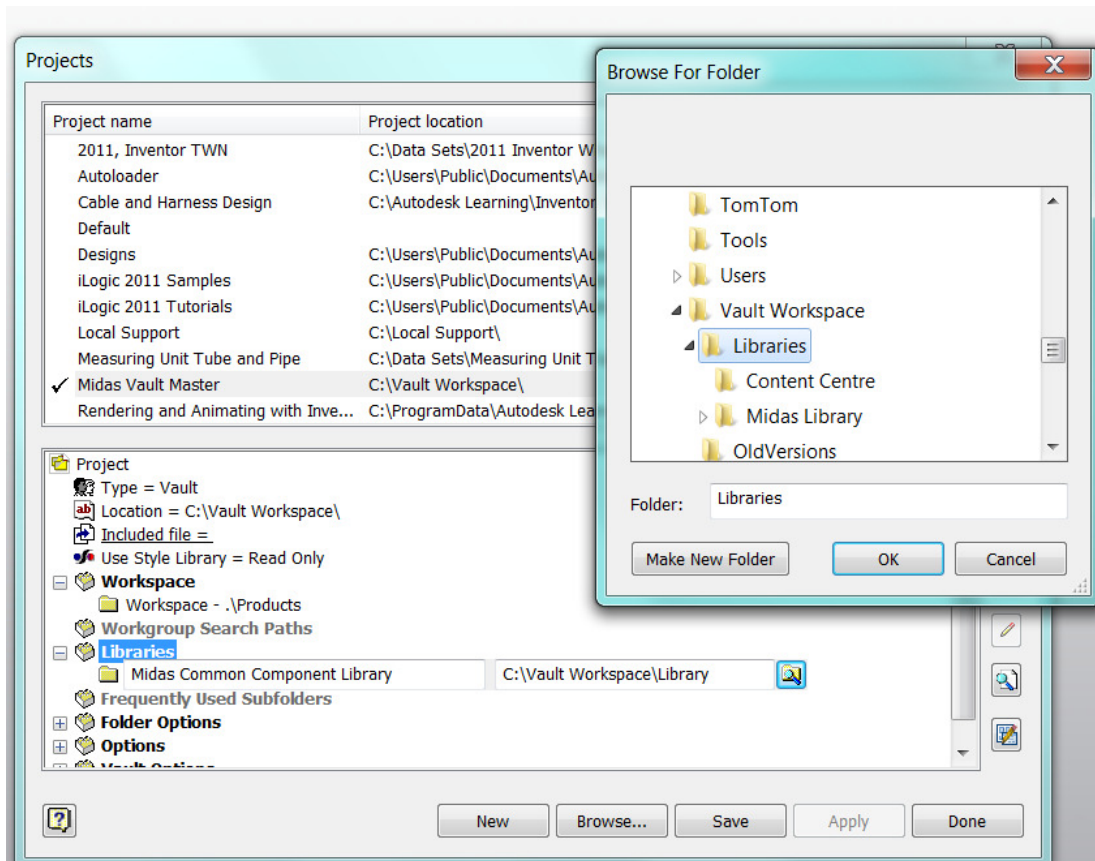
3. Modify the workspace. Expand the Workspace feature in the lower project window, right-click the workspace and select edit, then browse for the primary folder (*Products* used in this example).



Note – remember to select Save to capture any modifications to the project file.

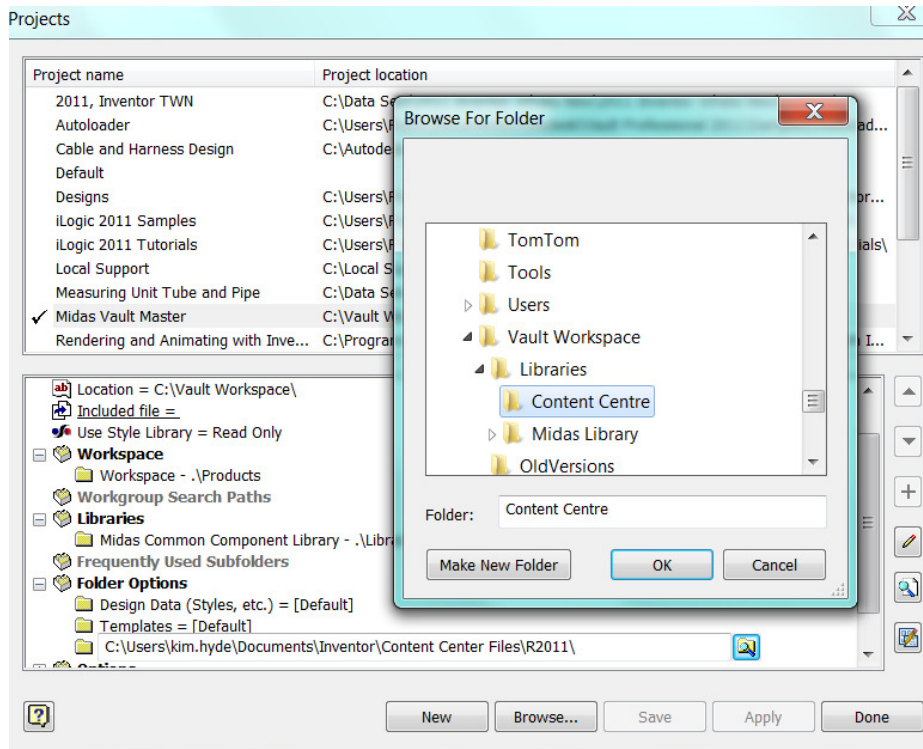


4. Add a library reference. Right-click Libraries in the lower project window, select Add Path, then edit the name and location to suite requirements.



Note – the use of a library location set in the Inventor project will prevent any editing to any data stored in this location, including any sub-folders. (This workflow suites designs using common components in multiple products.) Alternatively, common components could be located as a sub-directory under the Products folder, but this would make the library components freely editable, so caution should be used if using this alternative workflow.

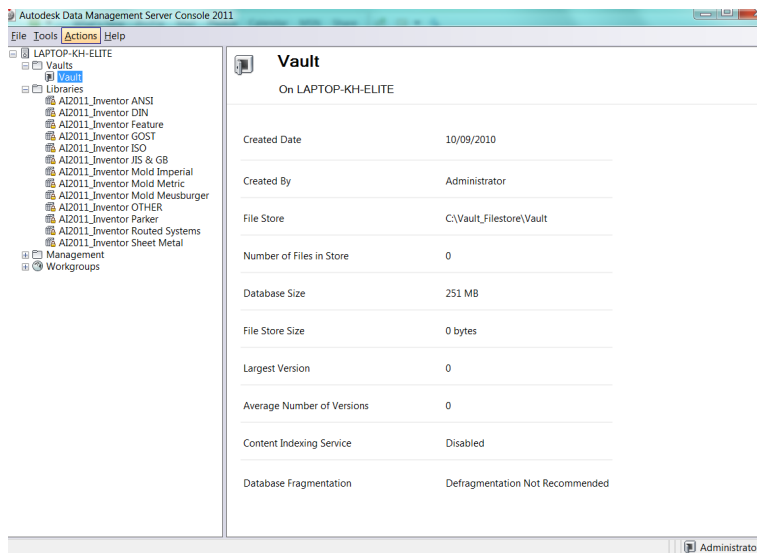
- Finally, set the Content Centre location. Expand Folder Options, then right-click Content Center Files and edit the location to the one created under the Vault Workspace folder. This will ensure that this location is used for the Master Vault Project and will ignore the default location set in the Inventor application options.



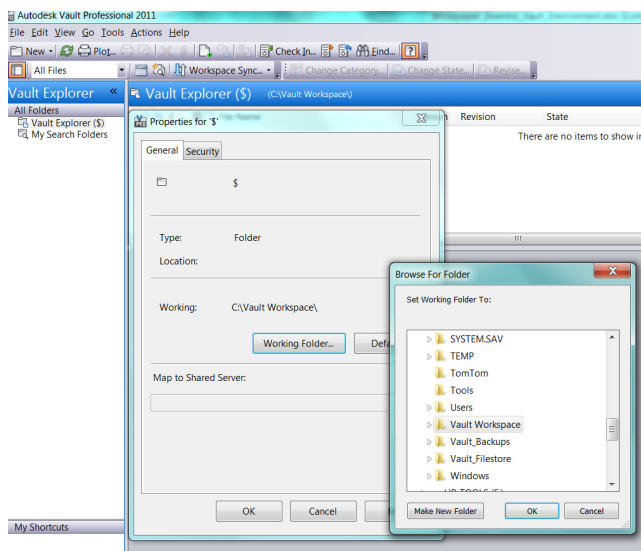


## Section-3 Setting up from a blank Vault database

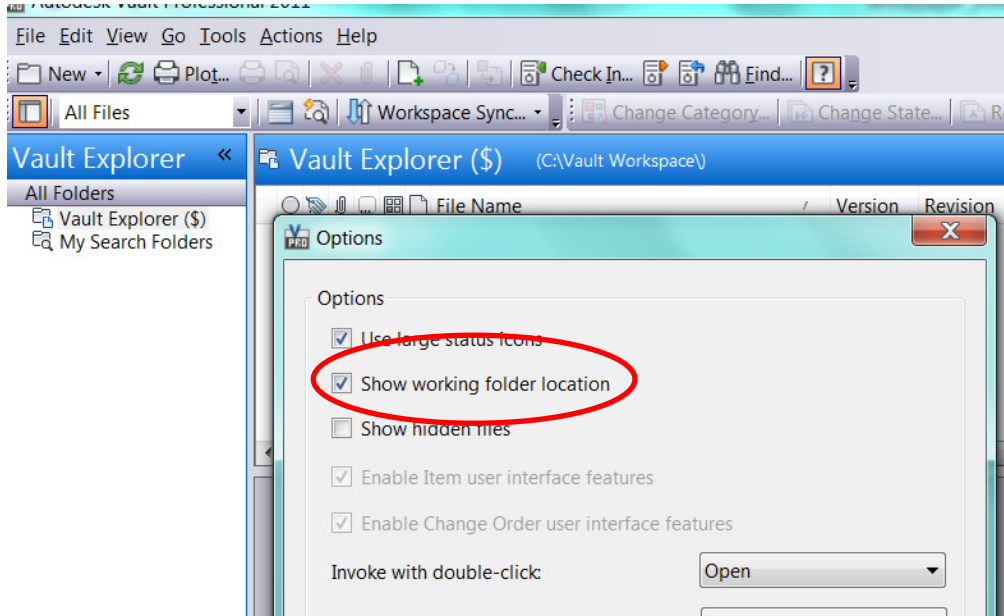
In this section we will look at setting up a default blank vault database and create the necessary mappings for the folder locations via Inventor. The following image is from the sever-based ADMS (Autodesk Data Management Console 2011) showing a default Vault and server base Content Centre libraries.



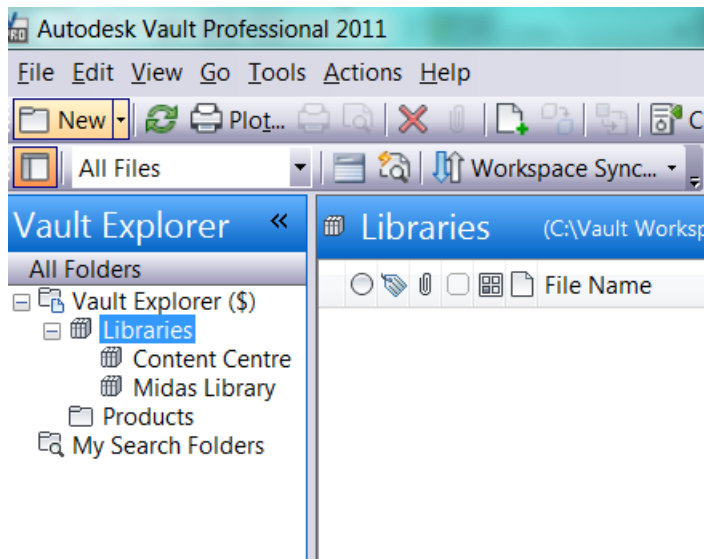
1. Using Vault Explorer set the Workspace location. Right-click the root *Vault Explorer (\$)* folder and select *Properties*. Select *Working Folder ..* button, then browse for the Vault Workspace folder.



2. Select Tools > Options, then select tick-box to *Show working folder location*.



All is now ready in the Vault Explorer window, although no files are shown. The next task will be to map the folder locations using Inventor, then to check-in a sample set of files that will use all of the main file locations. Next create a matching folder structure (only primaries) to that created in the local Vault Workspace folder. (Remember to use Library Folders where required).

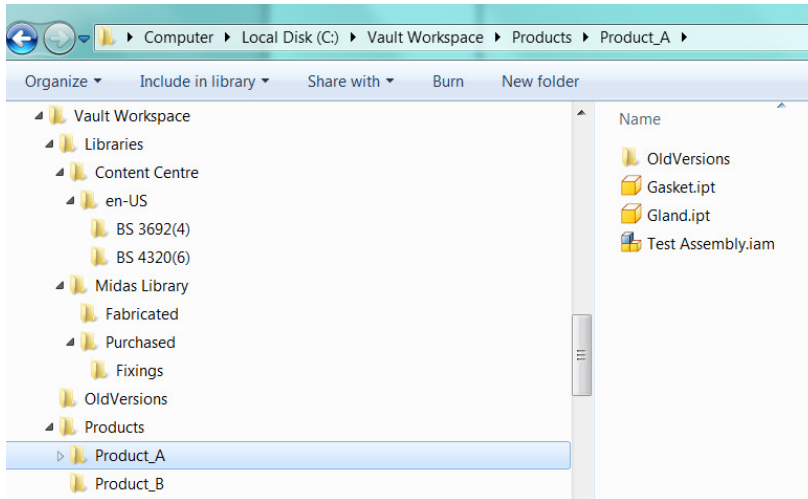


View showing the prepared empty vault.

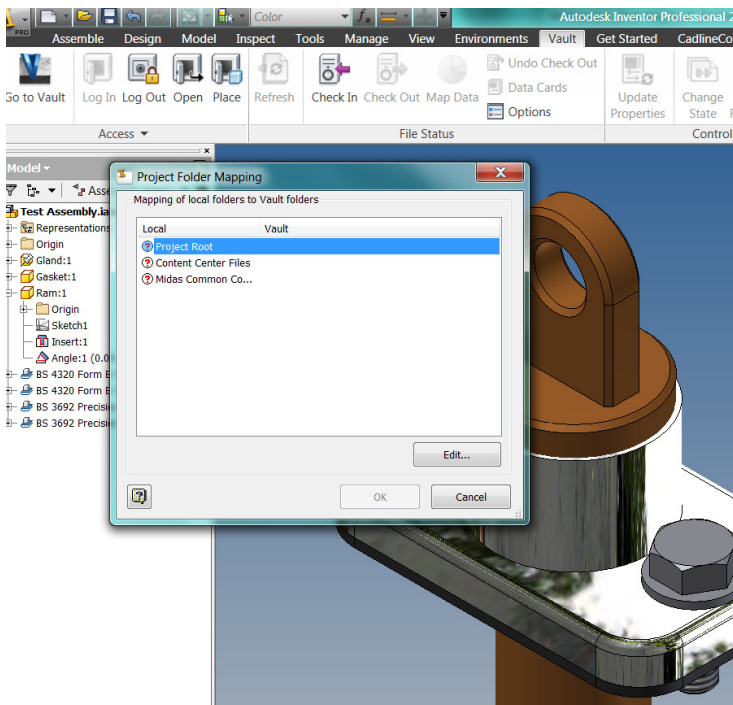


## Section-4 Setup Mapping and Check-In Sample Data

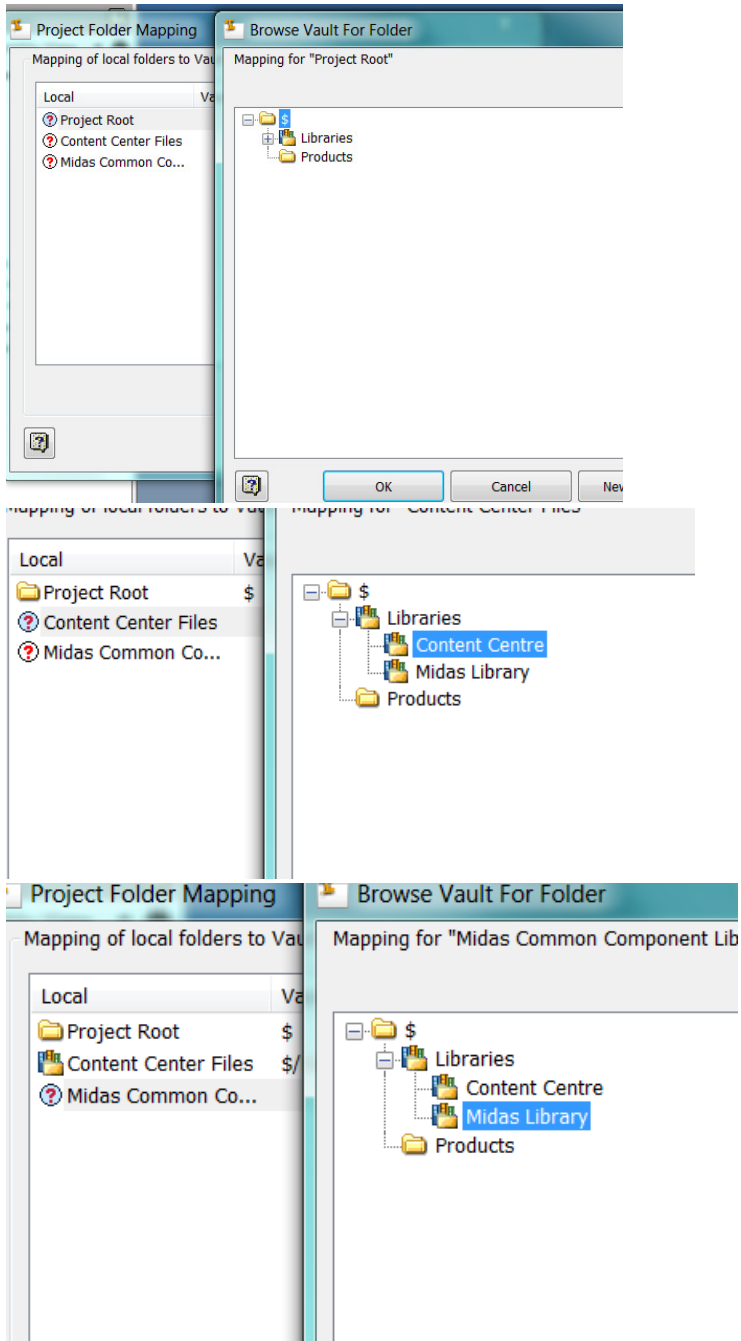
In this example and in preparation, some suitable files have been created/copied into the local Vault Workspace. This also includes one file using a library location and some Inventor Content Centre files (example shown below).

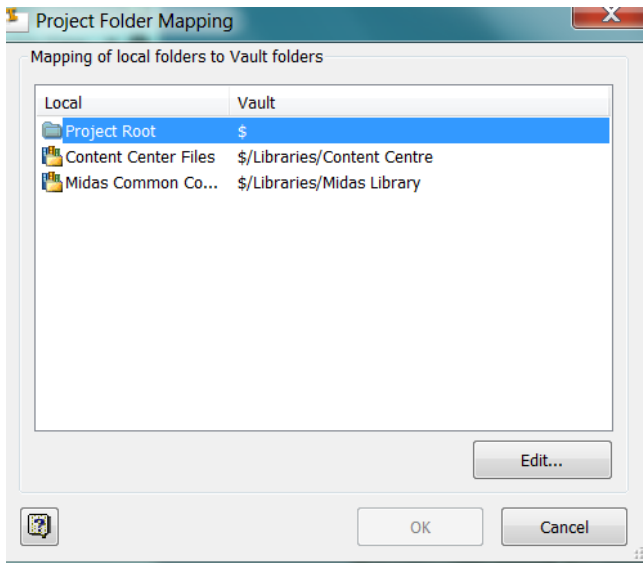


1. With the local assembly open in Inventor, from the 'Access' drop-down on the Vault ribbon, select Map Folders.



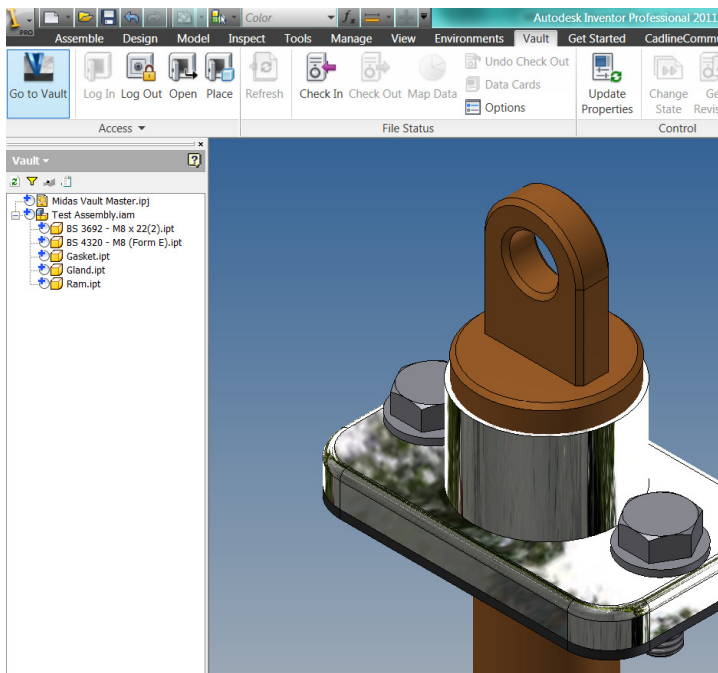
2. Edit (or double-click) each of the three reference folders. (Note for ?Project Root, select \$ folder from Vault).



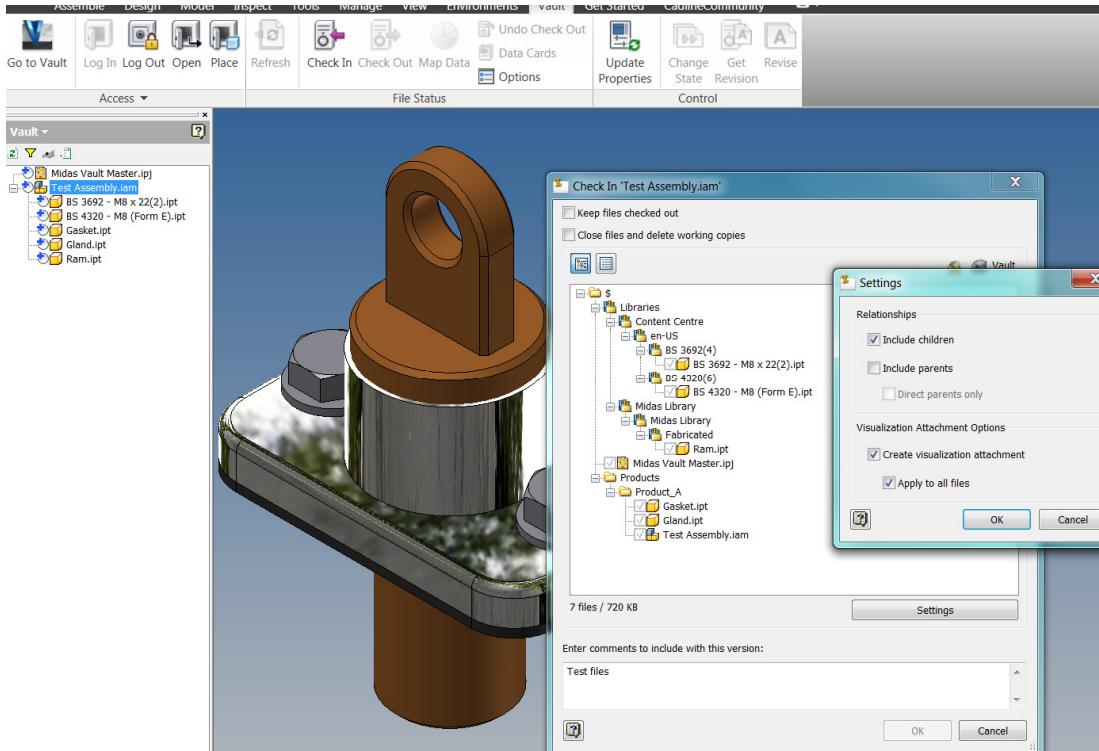


View showing completed mapping

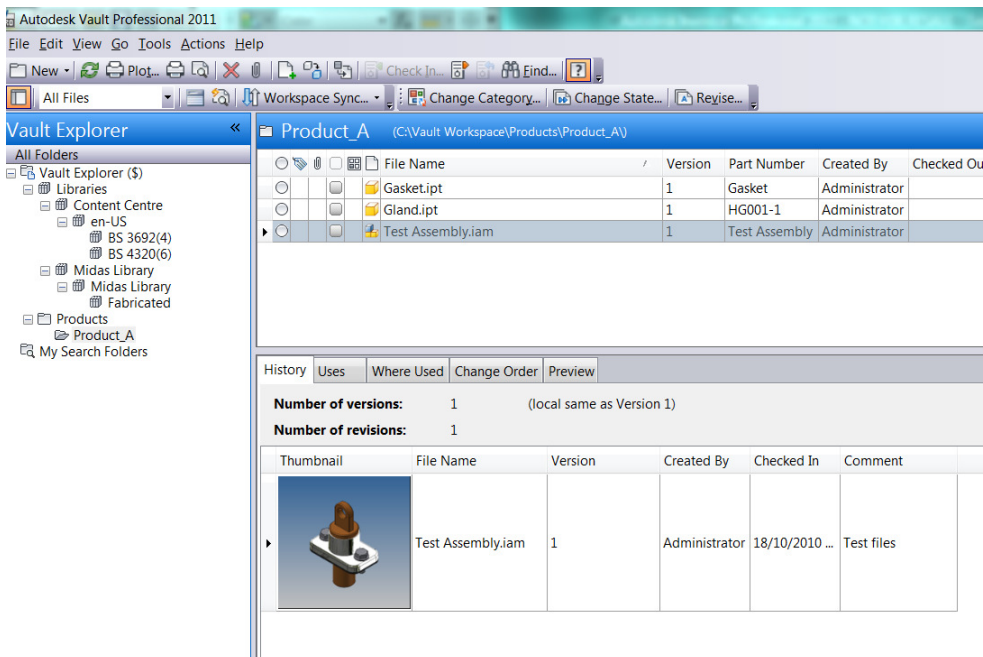
3. Check-in sample design. Change browser to Vault view to show status of current data.



4. Check-in assembly, note file locations and check that settings will produce visualization files (DWF files).



5. Finally, switch back to view the files in Vault Explorer, checking folder locations for the files used.



## Summary

The files and folder names used in this paper are intended as an example only. Once the Master Project file has been vaulted it can be copied from the Vault all Inventor users. Test files can be deleted if not required.

I hope this White Paper has helped in the understanding of the required stages to setup the various requirements relating to the project and workspace used by Inventor when working with Vault. This document is intended as a guide only, please contact a member of the Midas team to discuss any further issues regarding the deployment of the Autodesk Vault products.



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