

PL11233: Behaviors 201 for Padawan Learners

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Introduction



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Class introduction

In this “201” level of Vault Behaviors classes we will explore behaviors command usage and administration and observe what happens to Vault objects. At the conclusion of this you will be well on your journey to becoming a Vault Jedi Master.

Key learning objectives

At the end of this class, you will be able to:

- Understand how categories drive the initial behaviors of objects
- Understand how to use behavior change commands
- Understand how lifecycle changes affect other behaviors
- Interact with properties both manually and automatically

Behaviors 101 Re-cap

Behaviors 101 Re-cap

- Revision
 - Identifying alpha-numeric value that represents the iteration of an object corresponding to a design milestone or release event
- Lifecycle
 - Describes the process or stages an object passes through from innovation to production or construction
 - State is a status within that process
- Property
 - String, date, number or boolean that serves as a characteristic or an identifier.
- Category
 - Not a behavior but brings them all together and makes them available

**Understand how categories drive the
initial behaviors of objects**

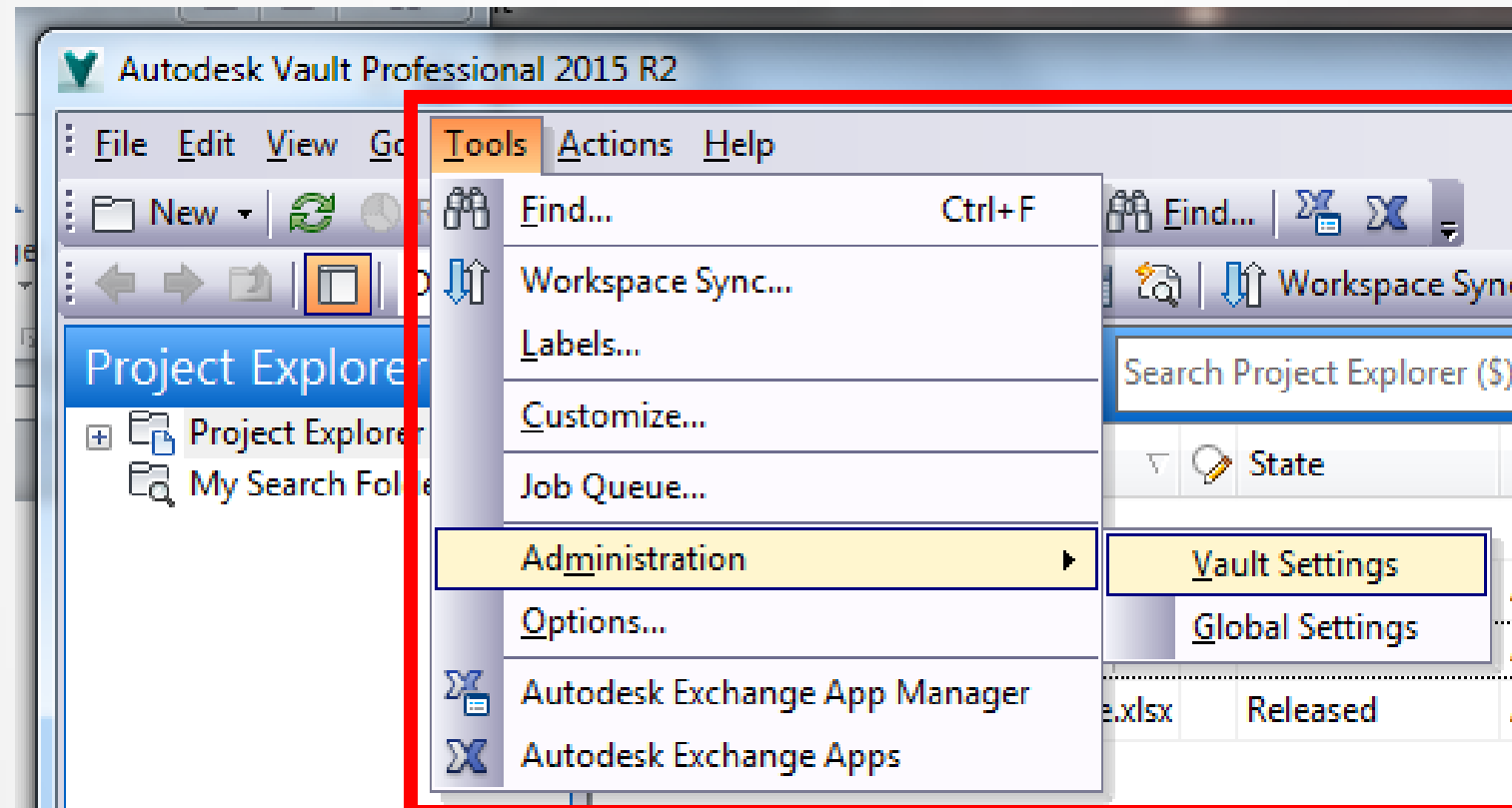
Category Assignment

- Objects are assigned to categories when they are created (initial checked-in, in the case of files)
- Category assignment rules
- Based on category, determines lifecycle, revision scheme and properties
- There is always a default behavior for any category
 - <None> “Opt-out” scenario in some cases

Category Administration Demo

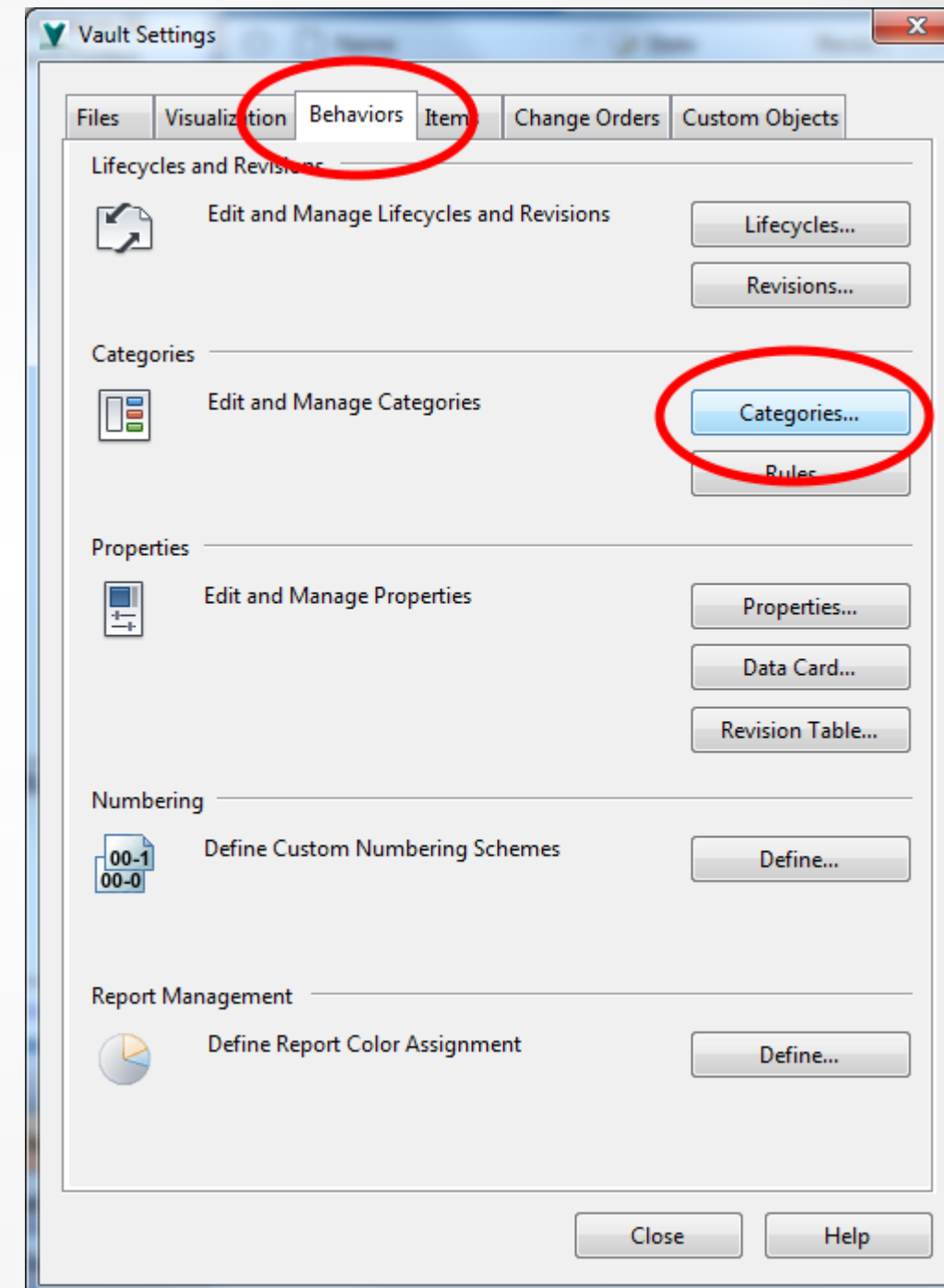
Category Administration Demo

- Where to find the administration settings
- Tools->Administration->Vault Settings



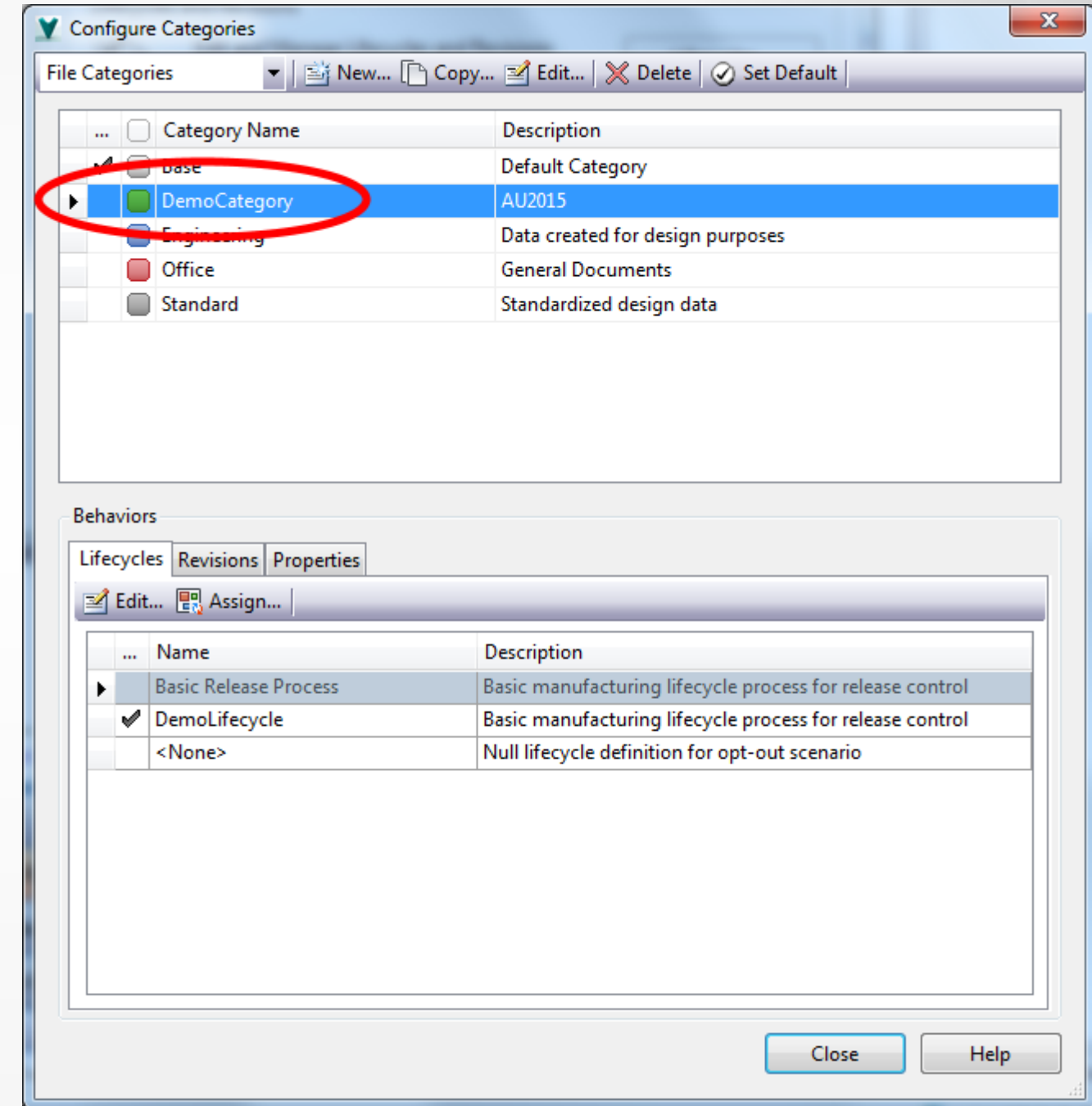
Category Administration Demo

- Behaviors tab, Categories button



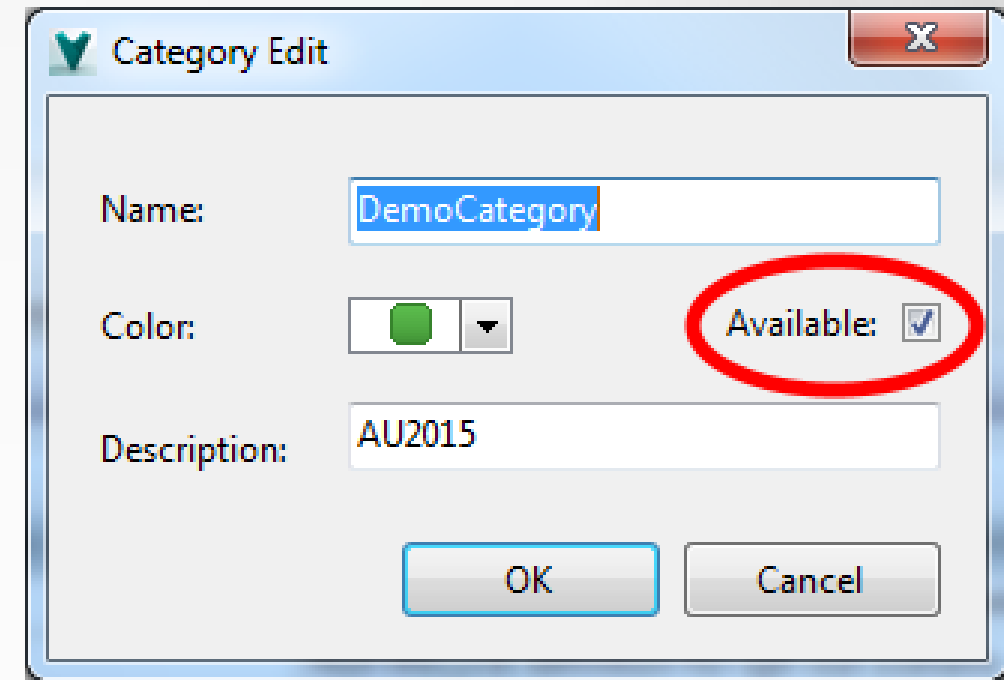
Category Administration Demo

- Configure Categories Dialog
- “DemoCategory”
- Offers lifecycles, revisions, properties at the bottom
- There is always a default




Category Administration Demo

- Edit a category
- “Available”
 - Change Category command
 - Create Item



Category Edit

Name: DemoCategory

Color:  ▼

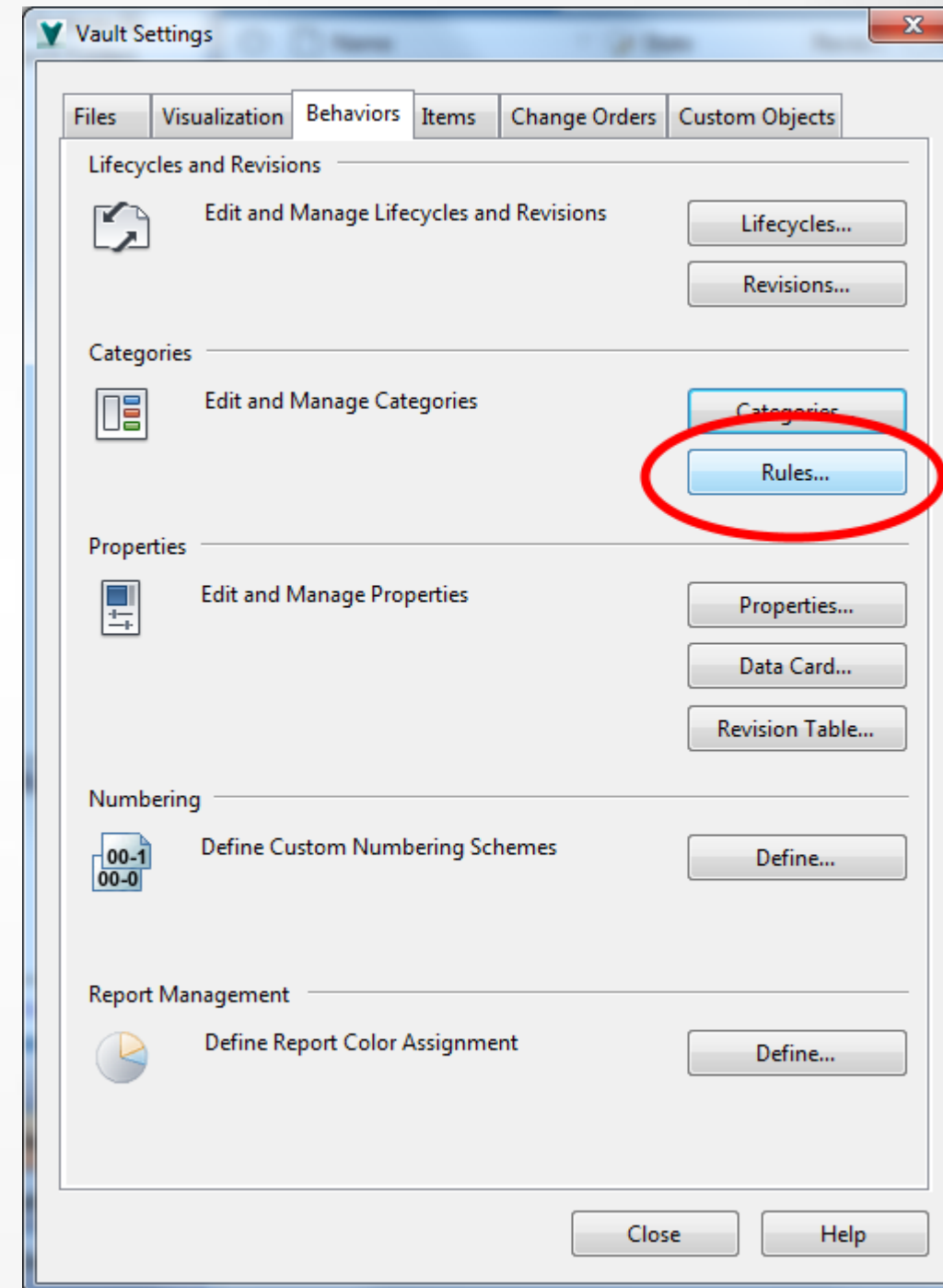
Available: ☒

Description: AU2015

OK Cancel

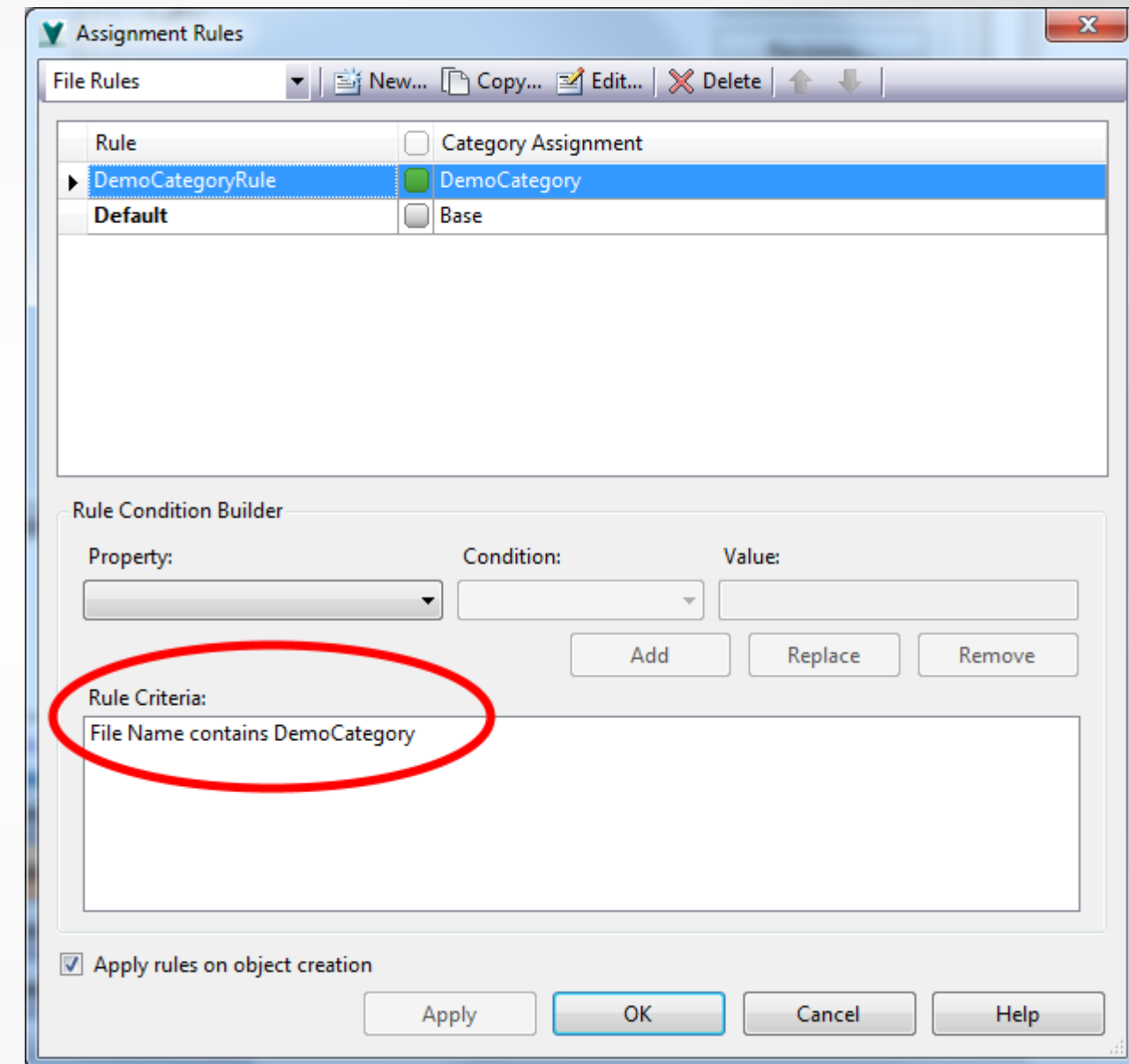
Category Administration Demo

- Category Assignment Rules



Category Administration Demo

- Category Assignment Rules
- Based on properties
- Once a rule is satisfied that category is used and no other rules are evaluated



Category Administration Demo

- Check in a file called “DemoCategory.xlsx”
- Assigned to the category “DemoCategory”

The screenshot displays a file management interface. On the left, a table lists files with columns for Name, State, and Revision. The file 'DemoCategory.xlsx' is highlighted, and a red circle is drawn around its icon. On the right, a detailed view of 'DemoCategory.xlsx' is shown, with a red rectangle highlighting the 'Category Name' field, which is set to 'DemoCategory'.

Name	State	Revi...
DemoPropertyRead.xlsx	Work in Progress	A
DemoPreChangeState.xlsx	For Review	A
DemoPostChangeState.xlsx	Released	A
DemoCategory.xlsx	Work in Progress	A

System	
Category Name	DemoCategory
Category Name (Historical)	DemoCategory
Change Order State	
Checked In	11/24/2015 9:18 AM
Checked Out	
Checked Out By	

Category Administration Demo

- Check in another file and notice different category

The screenshot displays a software interface with two main panels. The left panel, titled 'File', contains a table with columns 'Name', 'State', 'Revi...', and icons. The right panel, titled 'System', contains a table with columns 'Category Name' and 'Base'.

Name	State	Revi...	Icons
SomeOtherFile.xlsx	Work in Progress	A	Icons (circled in red)
DemoPropertyRead.xlsx	Work in Progress	A	Icons
DemoPreChangeState.xlsx	For Review	A	Icons
DemoPostChangeState.xlsx	Released	A	Icons
DemoCategory.xlsx	Work in Progress	A	Icons

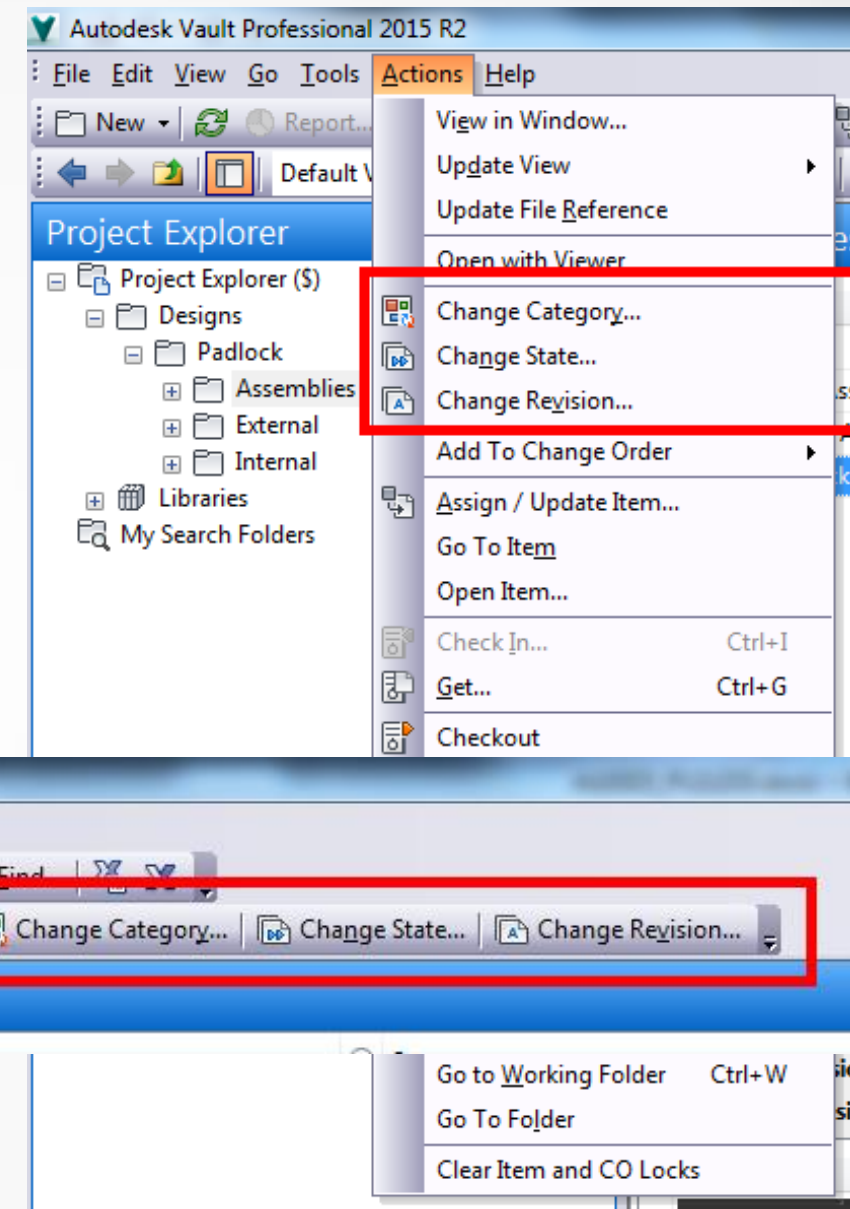
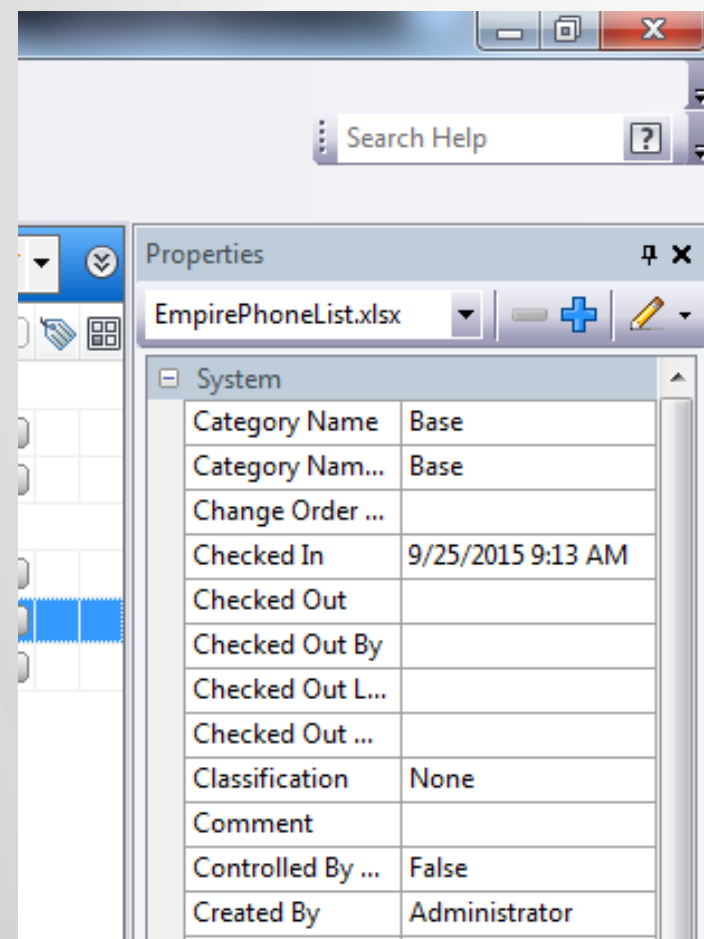
Category Name	Base
Category Name (Historical)	Base
Change Order State	
Checked In	11/24/2015 9:21 AM
Checked Out	
Checked Out By	
Checked Out Local Spec	

Understand how to use behavior change commands

Change Behaviors Demo

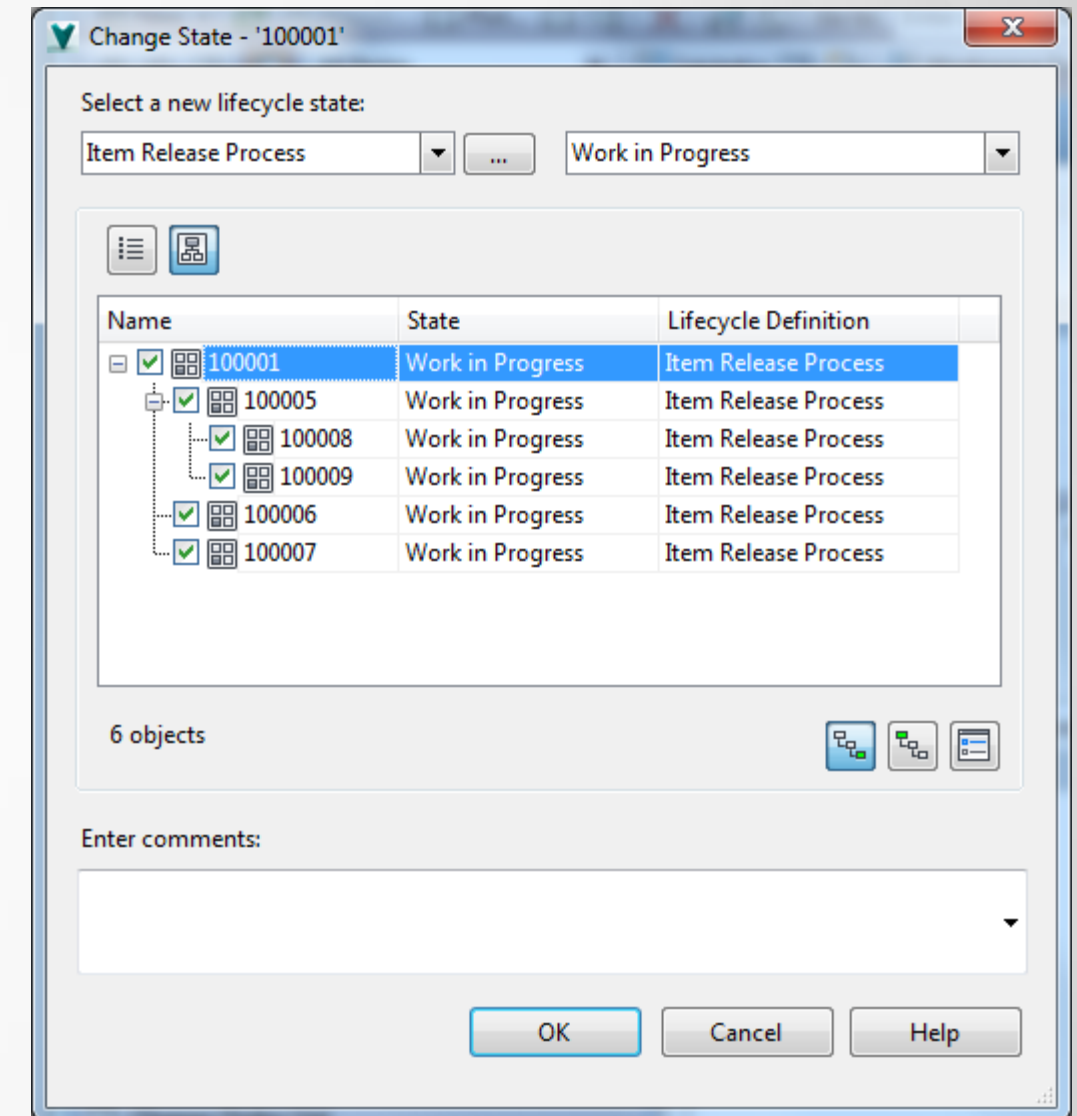
Change Behaviors Demo

- Finding the commands
 - Actions Menu
 - Behaviors Toolbar
 - Properties Grid



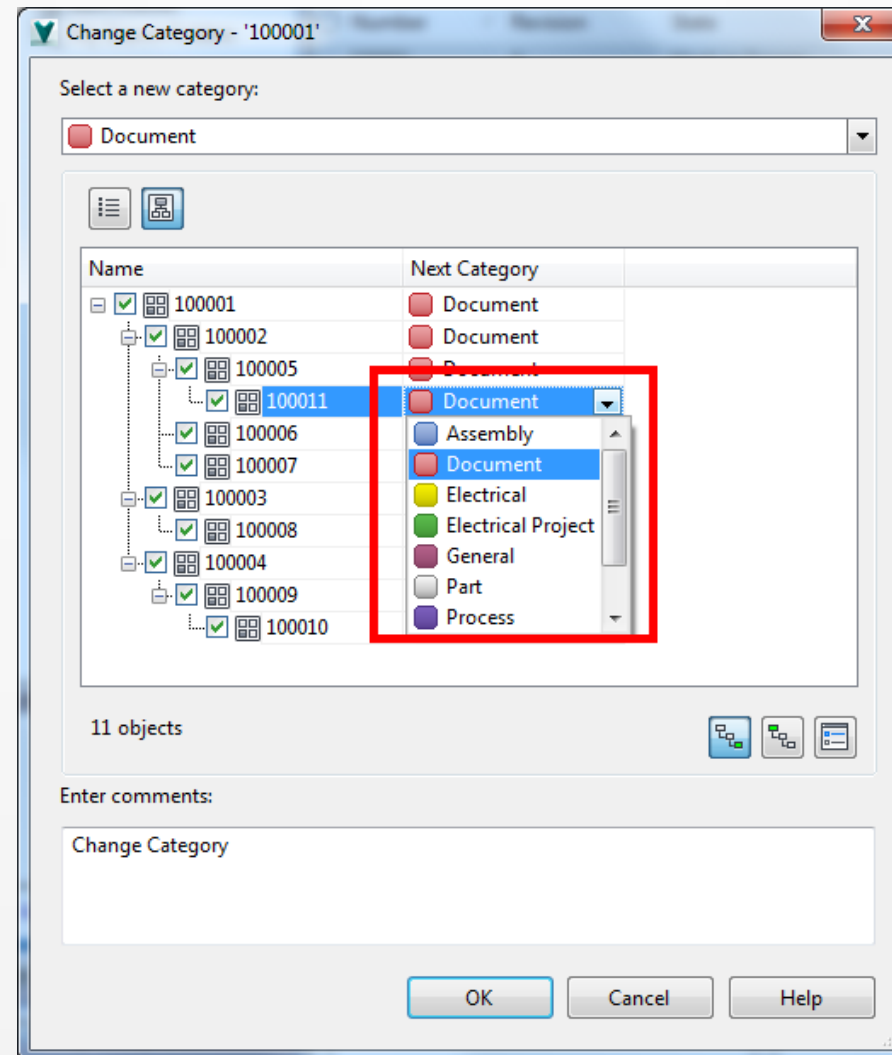
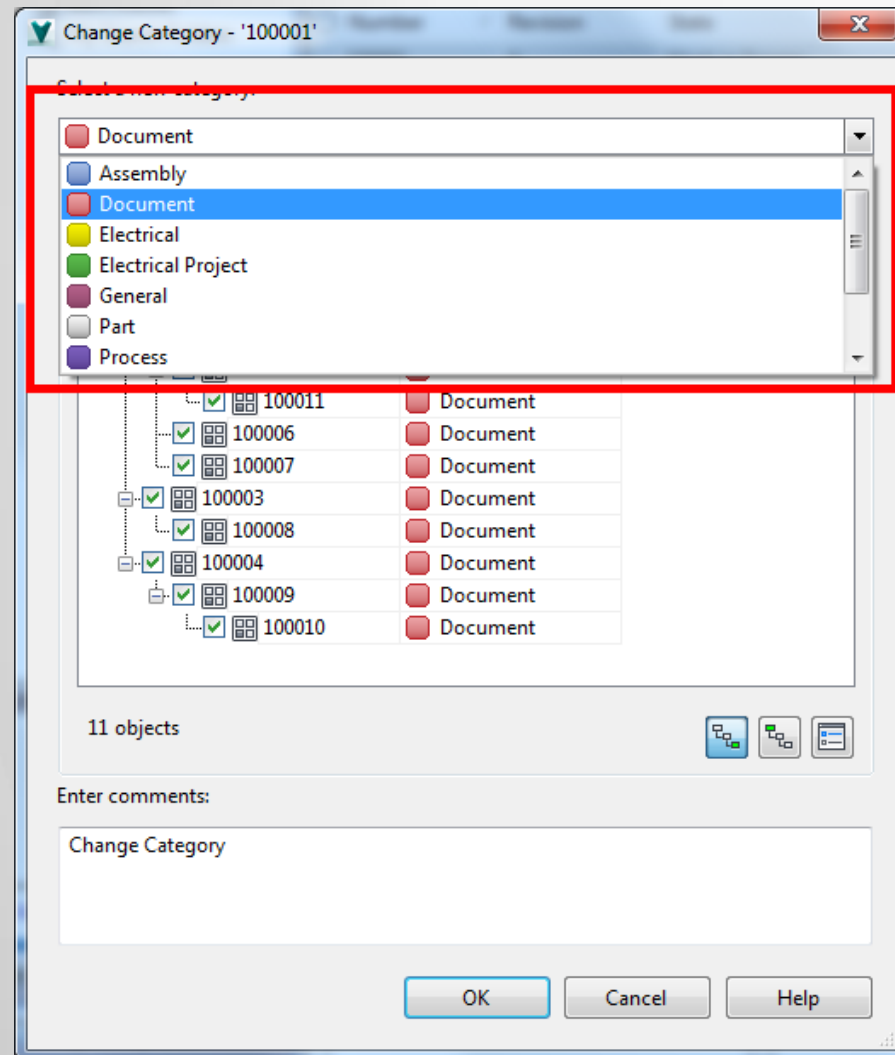
Relationship Gathering

- A means to collect objects that have relationships to the initial selection
- Gathers parents, children, library files (content center), attachments
- Allows individual changes or changes to all objects
- May disallow changes to some objects (i.e., checked-out files)
- Cloaked objects appear as “Inaccessible”
- Uncheck objects to avoid changing them



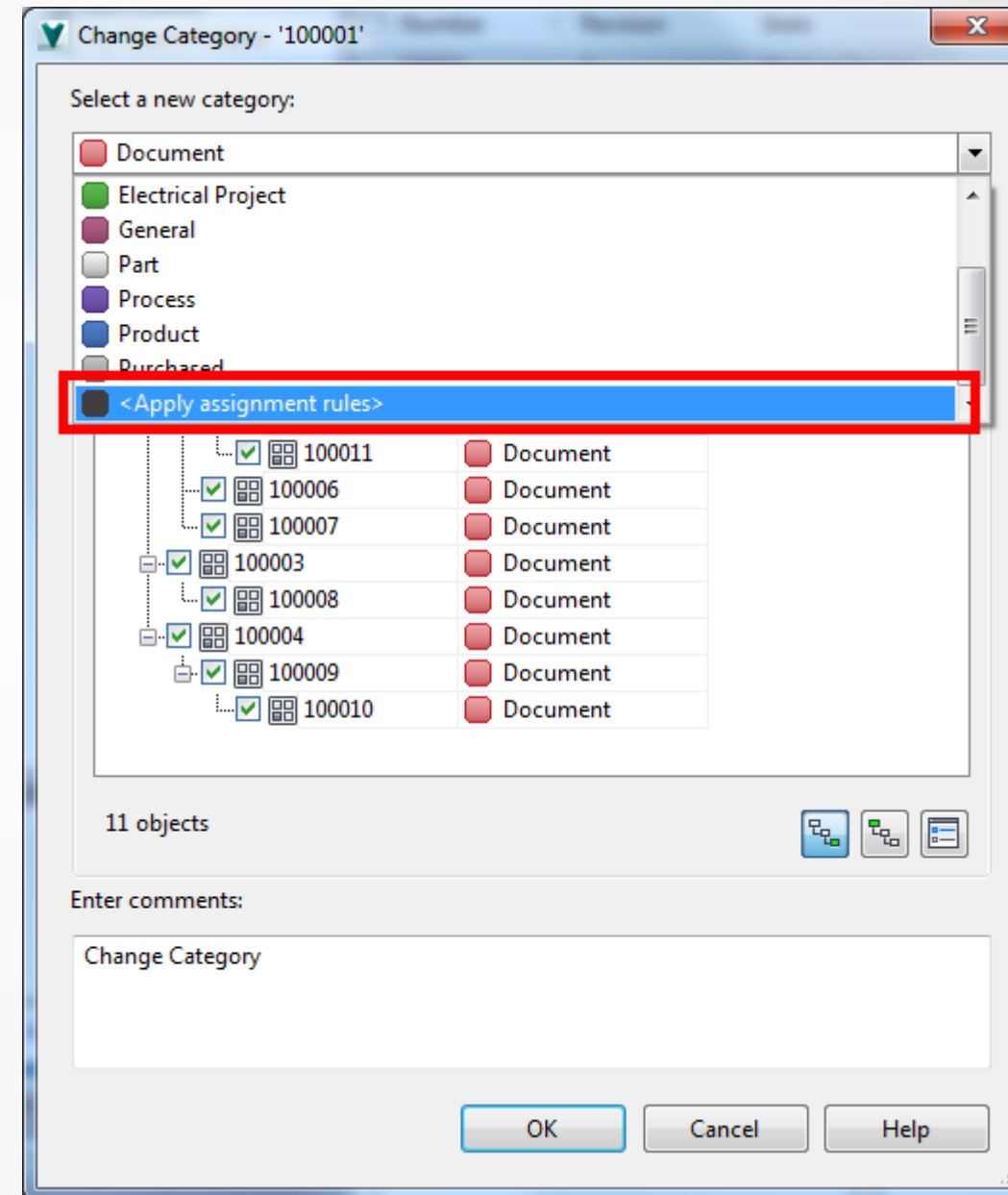
Change Behaviors Demo

- Change Category
- Change all from the top pull down
- Change individually



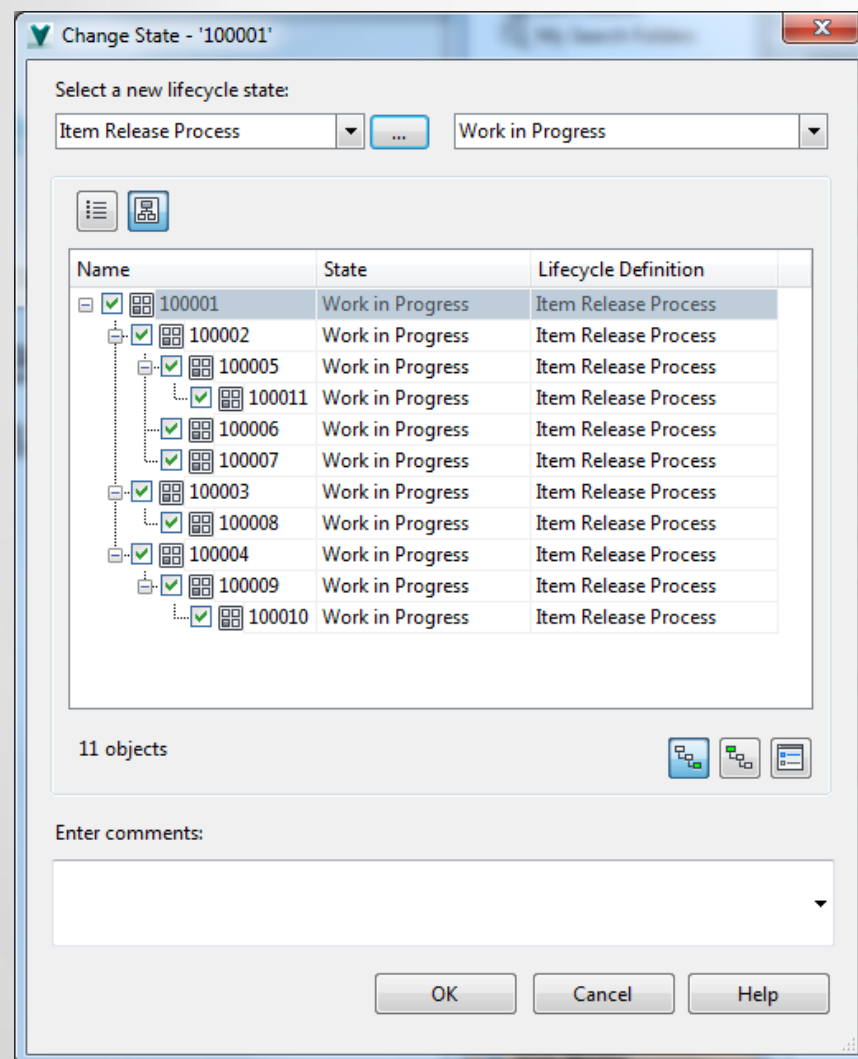
Change Behaviors Demo

- Category Assignment Rules
- Just like initial object creation



Change Behaviors Demo

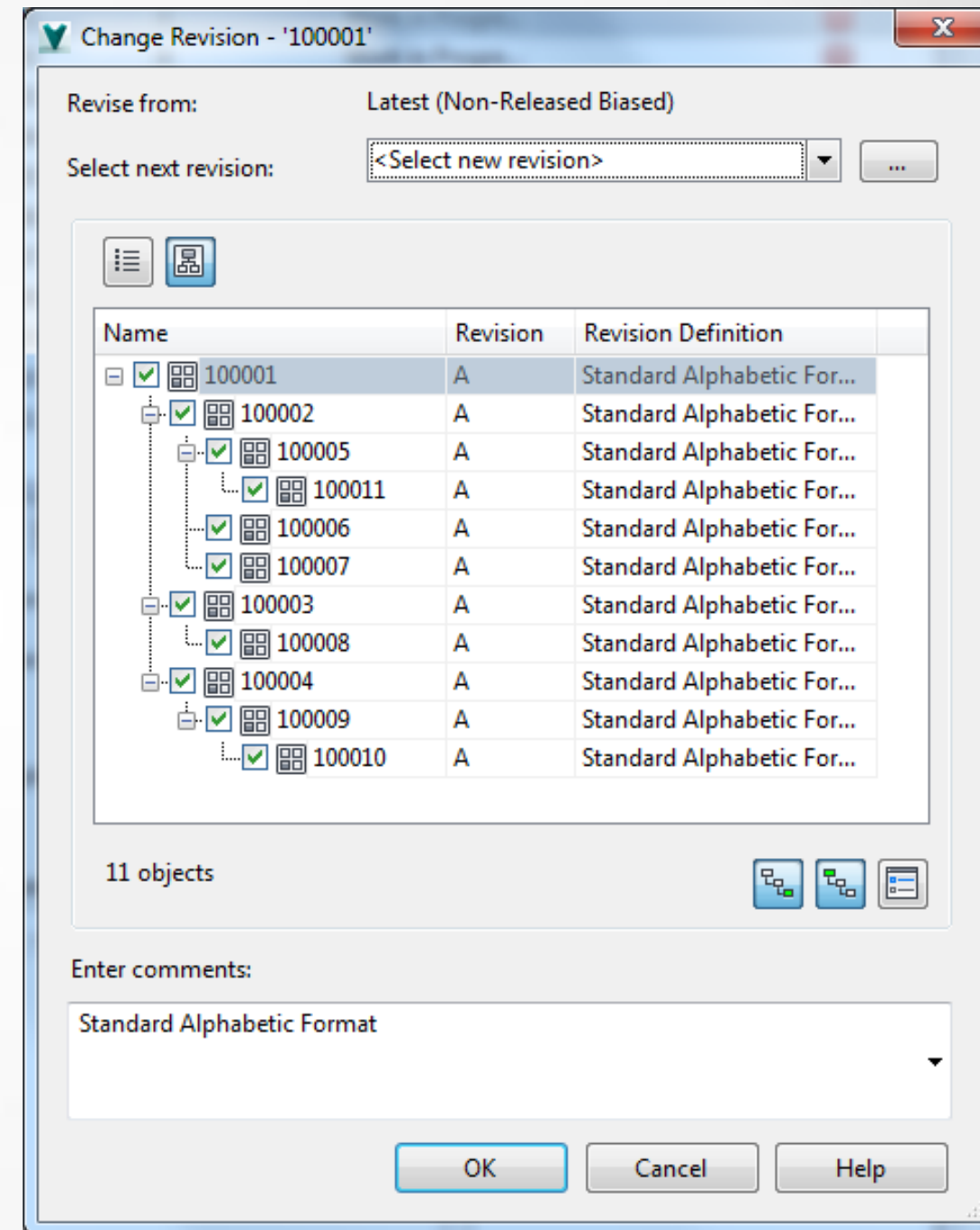
- Change State
- Change Definition from the upper left, or states from upper right
- Like Change Category, can change all from the top or individually



Changing to another definition will set the state to the default state of that new definition

Change Behaviors Demo

- Change Revision
 - Primary
 - Secondary
 - Tertiary
 - From user defined property
- Like Change Category, can change all from the top or individually
- Can manually enter values
- Can also change to another revision scheme



**Understand how lifecycle changes
affect other behaviors**

Lifecycle State Changes

- Transition availability may be configured by user/group
- Transition success may be enforced based on criteria
 - Criteria is *properties*-based
 - “Property Compliance”
- Key behavior affected is properties

Post-Lifecycle State Changes

- Automatically 'bump' a revision
 - Primary
 - Secondary
 - Tertiary
- Synchronize Properties
 - Does not occur immediately
 - Handled by a properly configured job server
- Key behaviors affected are revisions & properties

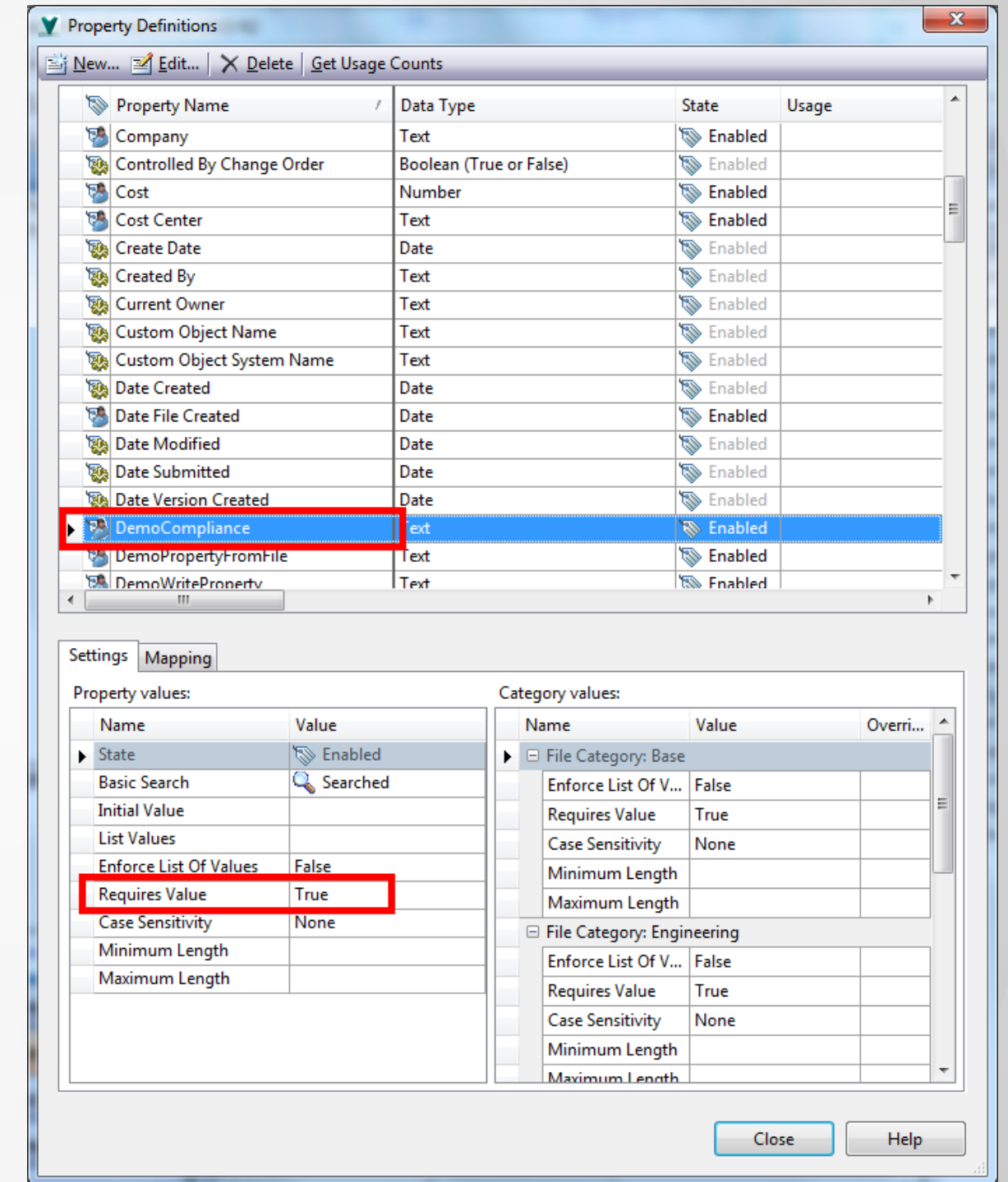
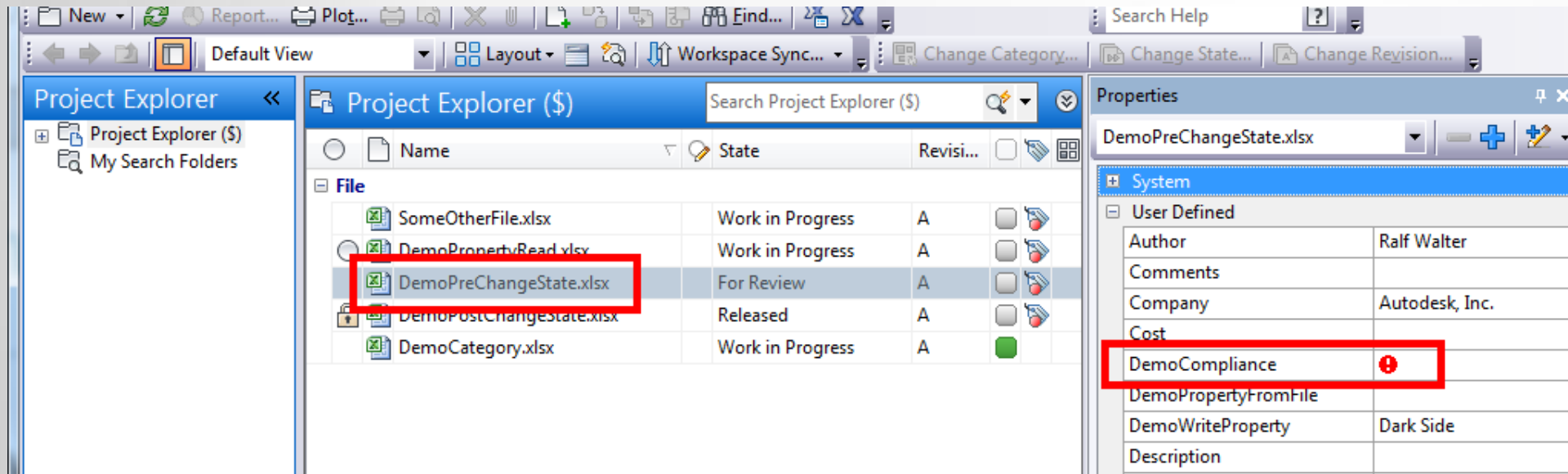
Change State Administration Demo

Change State Administration Demo

- Pre-State Change
 - Behavior affected is Properties
- Post-State Change
 - Behaviors affected
 - Revisions
 - Properties

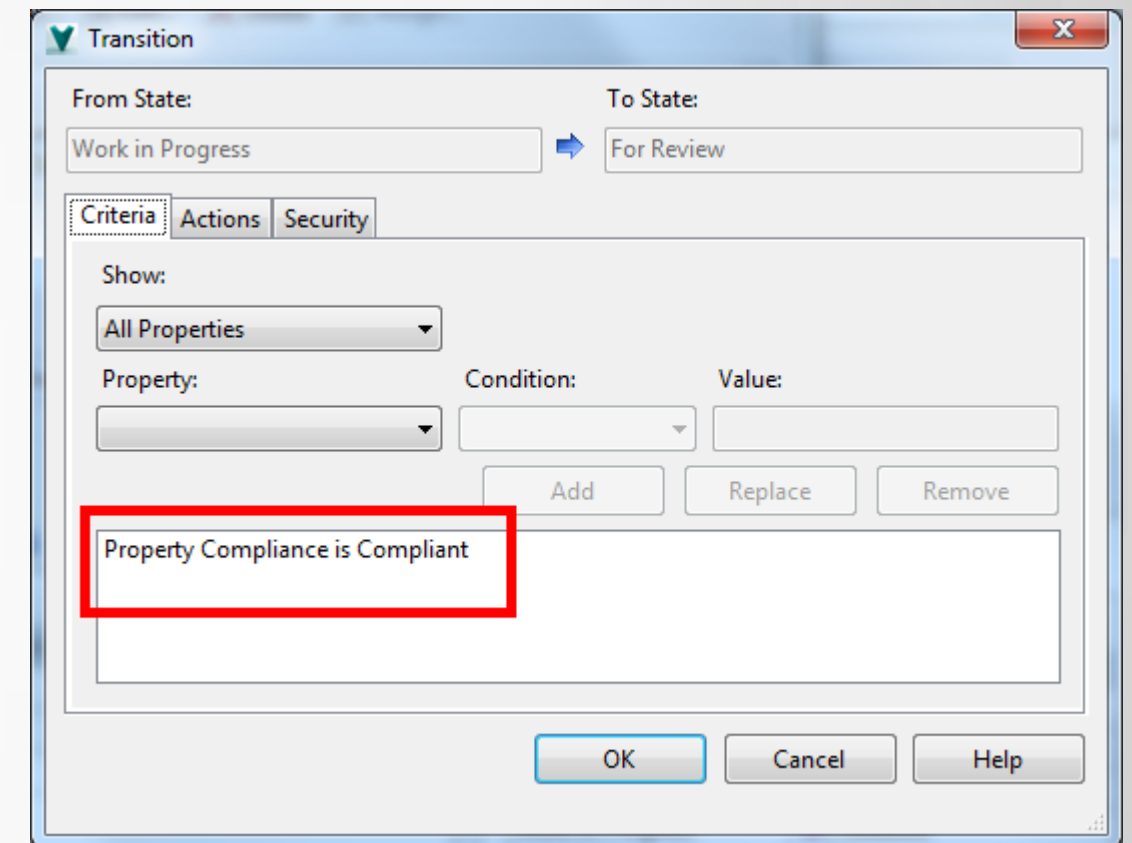
Change State Administration Demo

- Pre-State Change
- Non-compliant property
“DemoCompliance”



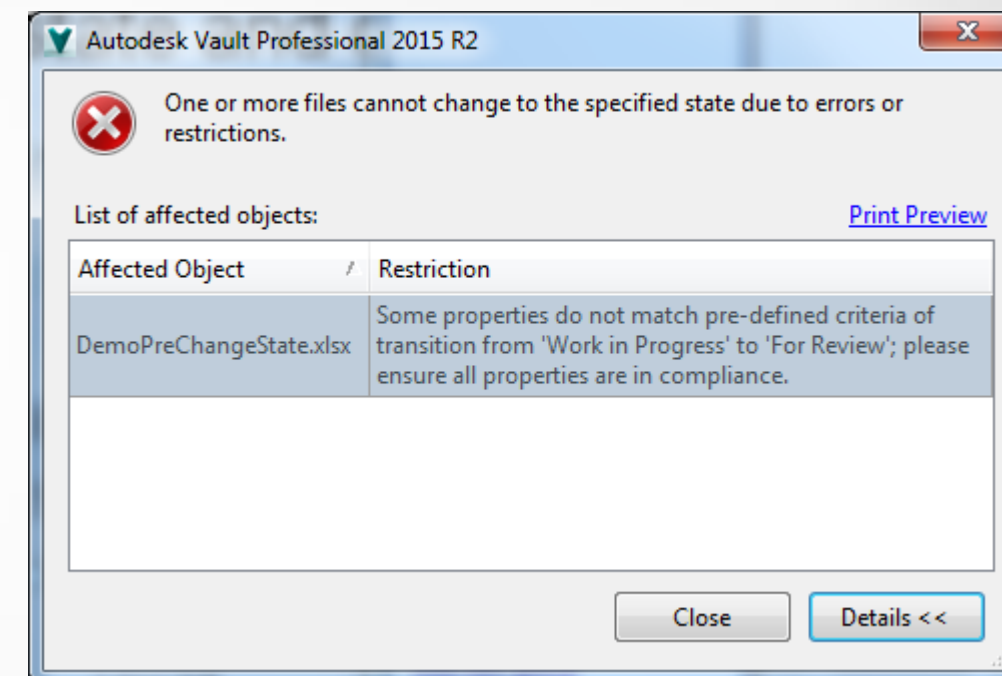
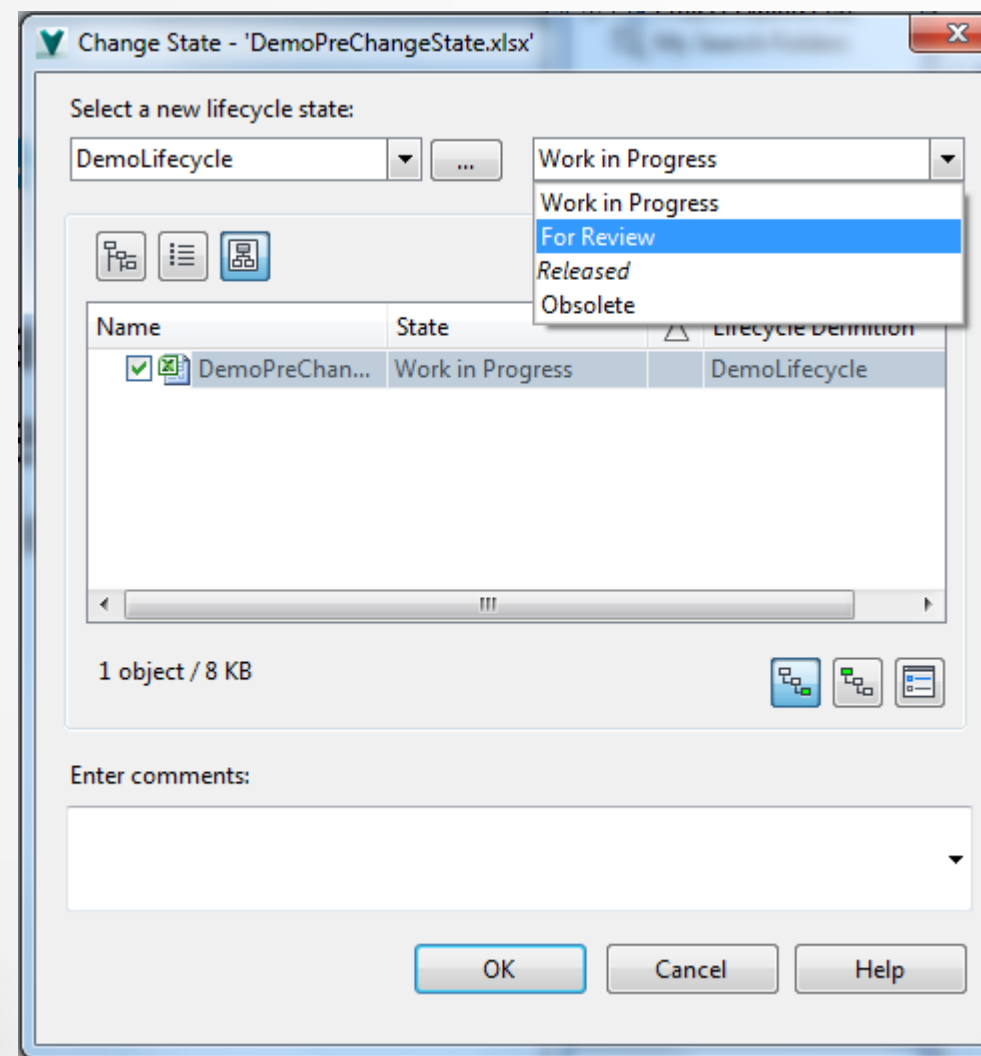
Change State Administration Demo

- Look at the state transition for “Work in Progress” to “For Review” for this file’s lifecycle
- “Criteria”, properties-based
- This transition can only be successful if the criteria is met
- “Property Compliance” is, in itself, a Vault system property



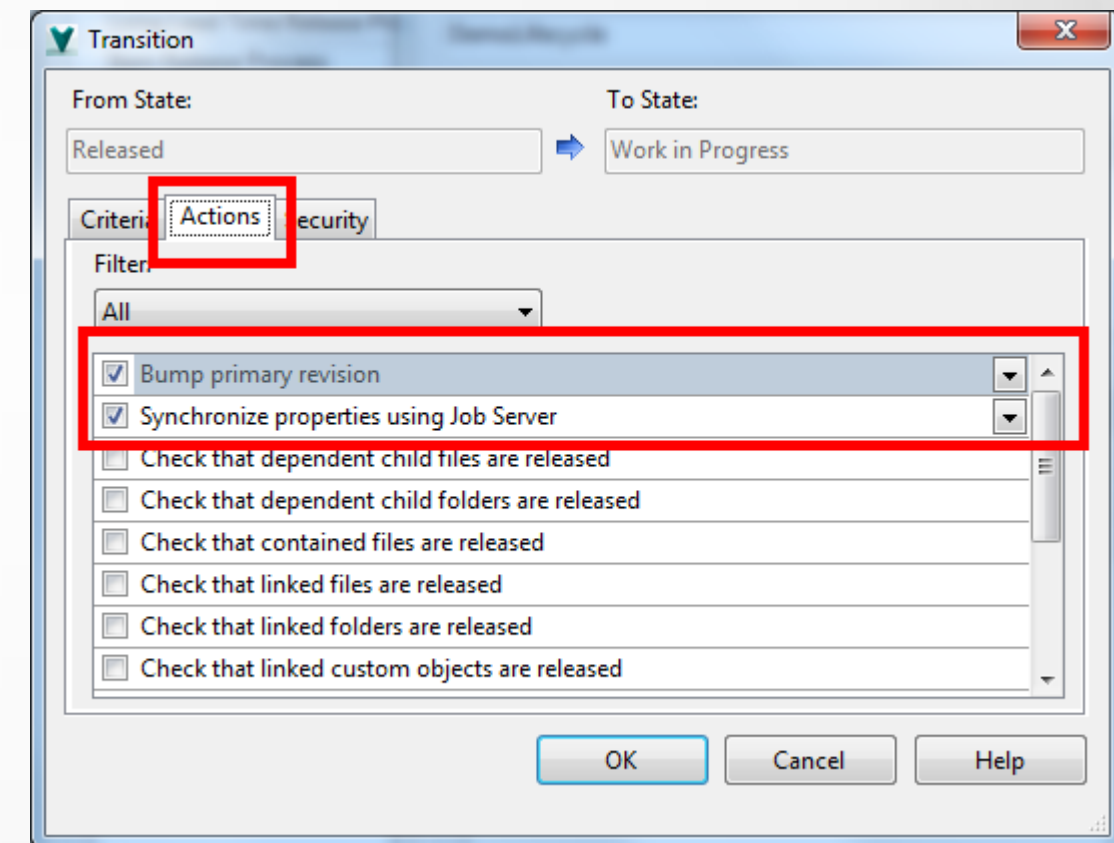
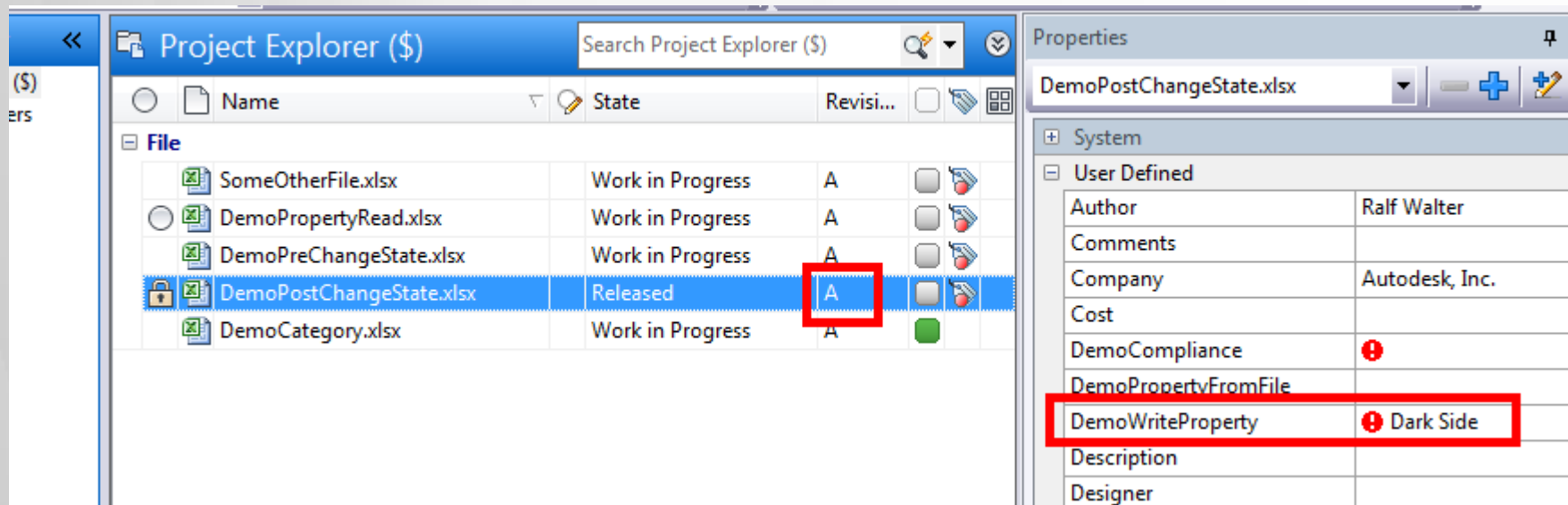
Change State Administration Demo

- Change the state and observe a restriction



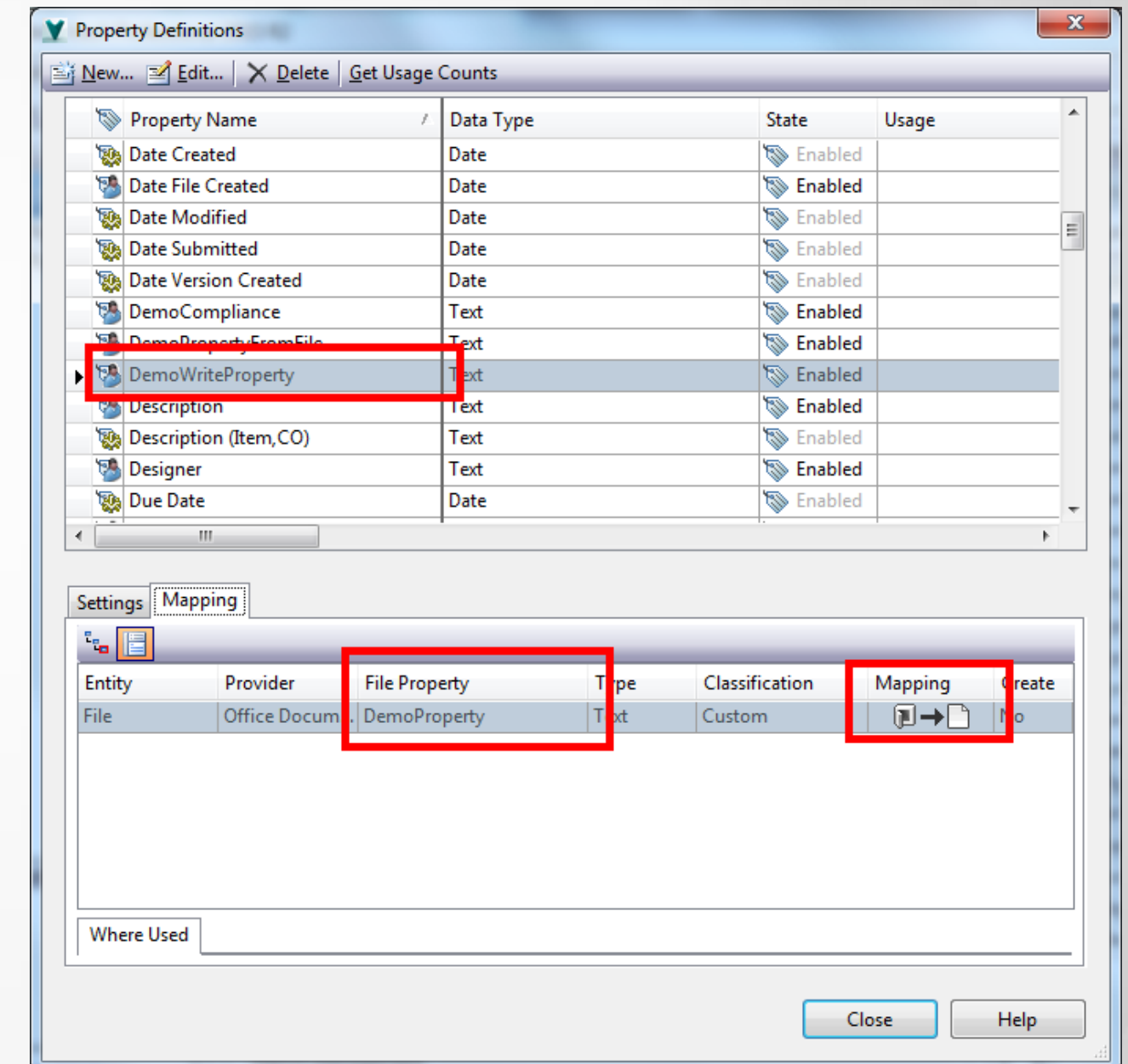
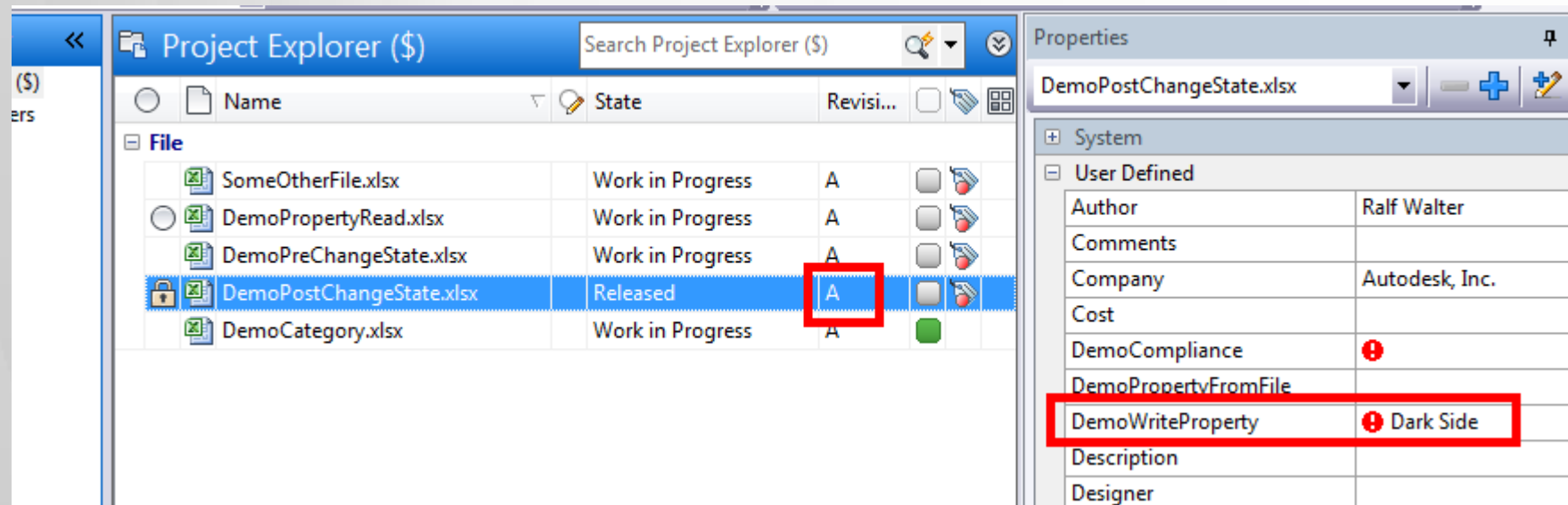
Change State Administration Demo

- Post-Change State
- Observe State Transition Action for “Released” to “Work in Progress”
- We can bump the revision
- Also Synchronize Properties



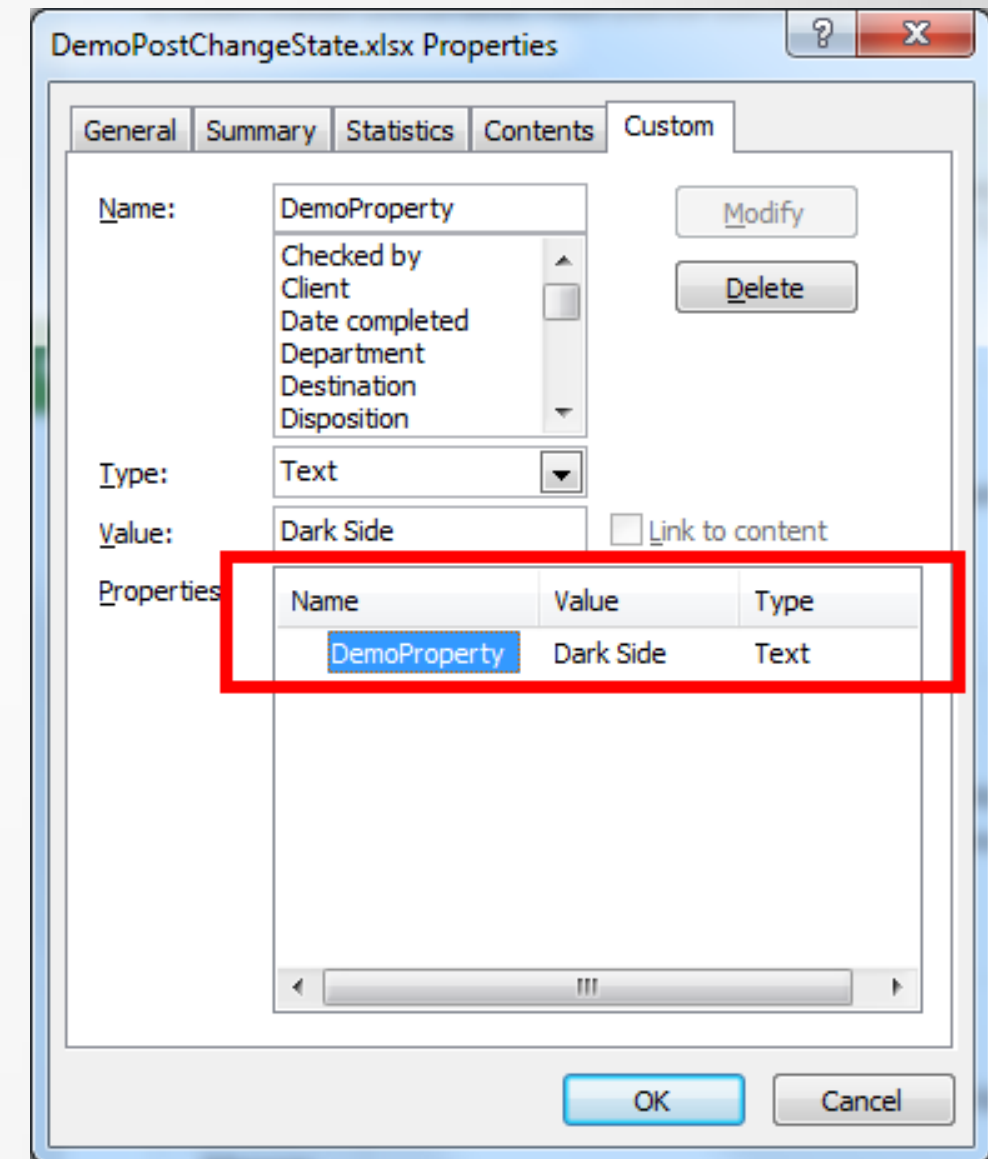
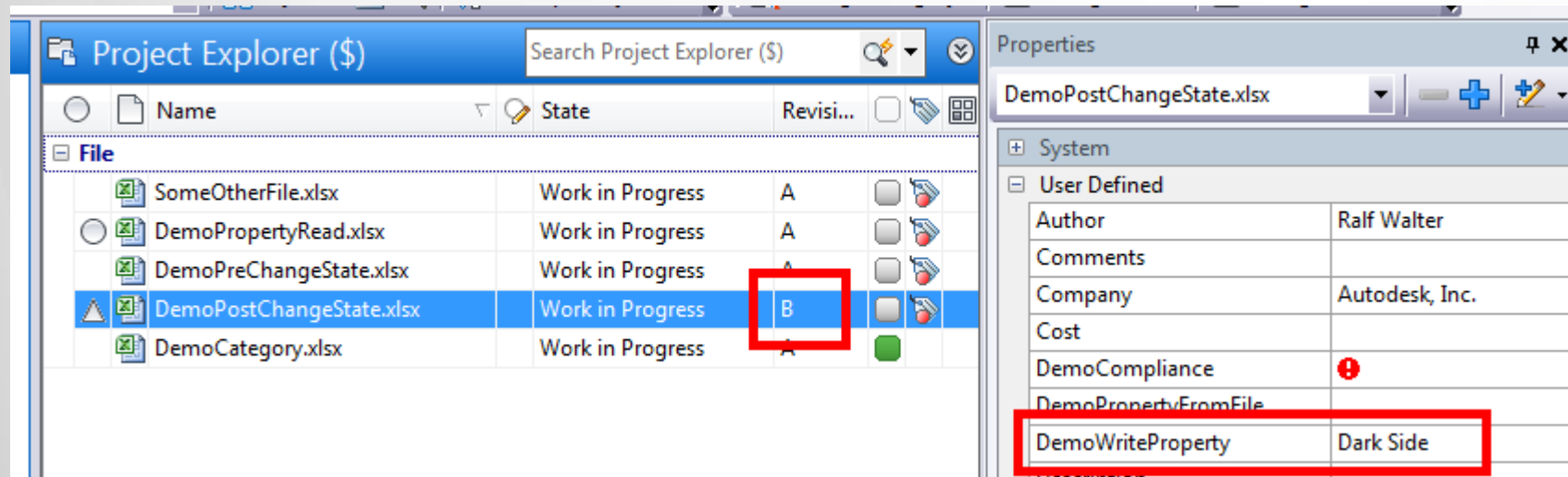
Change State Administration Demo

- The property “DemoWriteProperty” maps to a file property called “DemoProperty”
- The Vault to file icon denotes a write-mapping



Change State Administration Demo

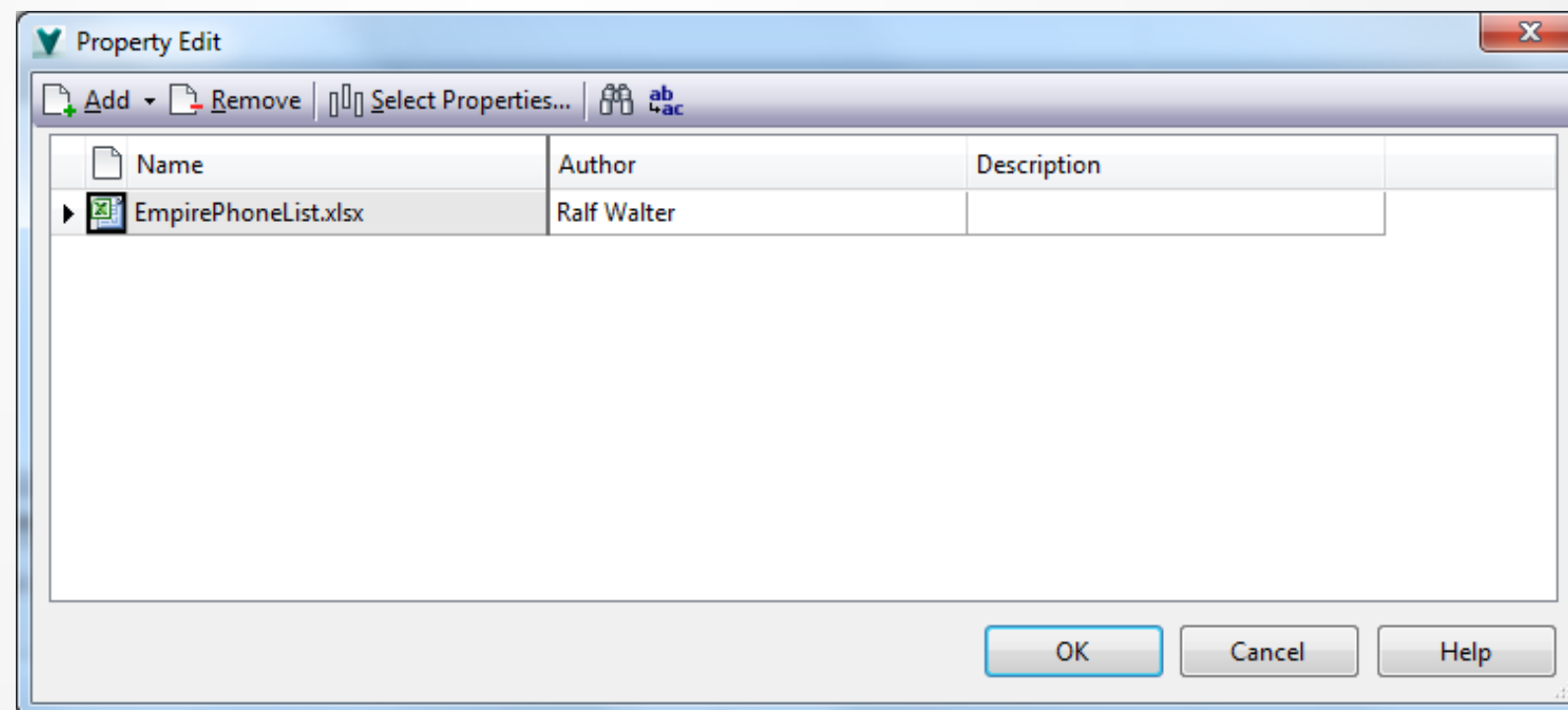
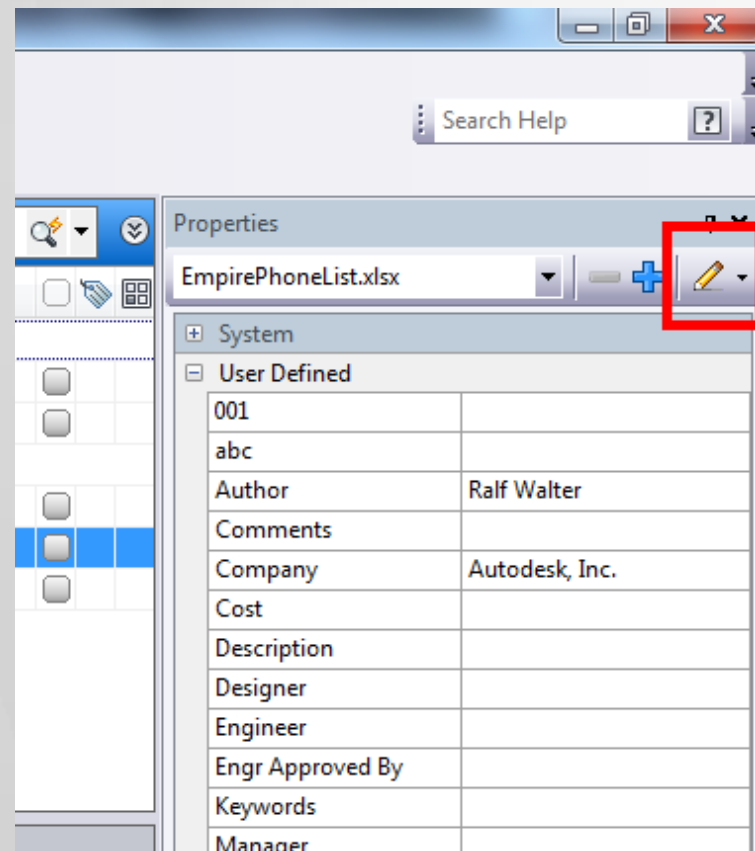
- Change the state to “Work in Progress”
- Revision is bumped
- Property is changed in the file
- Property is compliant



**Interact with properties both manually
and automatically**

Manual Property Edits

- Property editor
- Single or multiple objects
- Causes files to be checked out then checked in



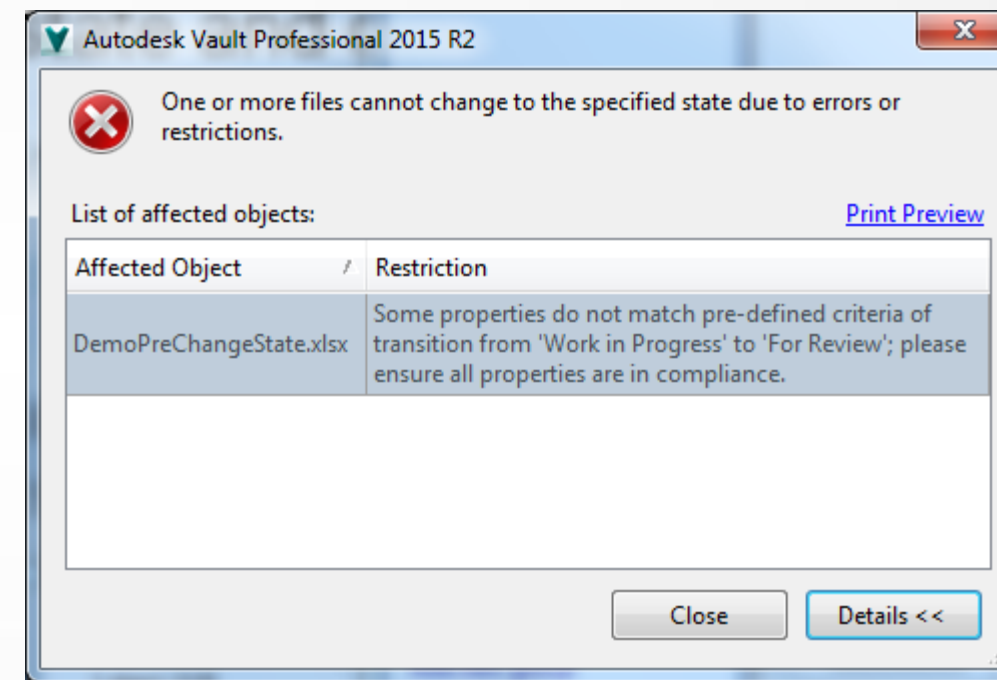
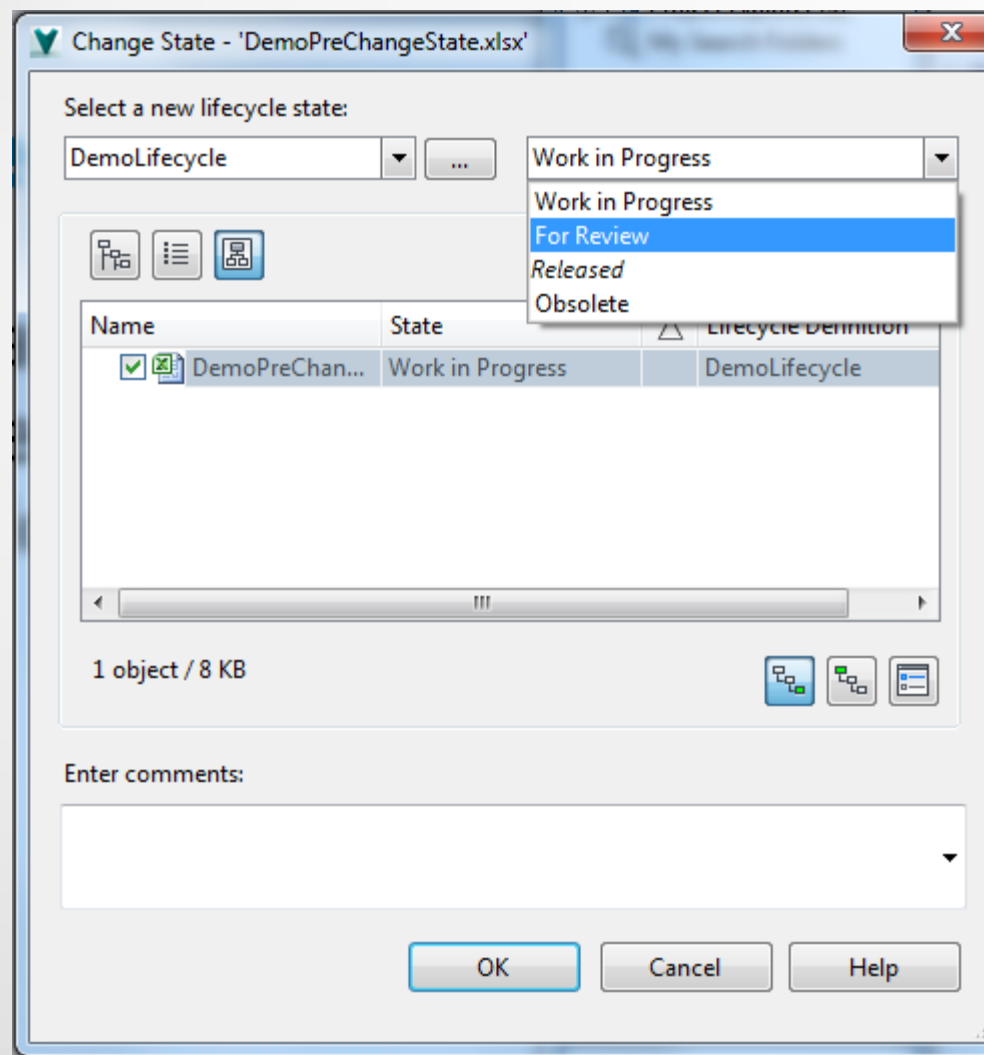
Automatic Property Edits

- Based on mappings, administrator
 - Write-mappings (to file)
 - When properties are manually edited (causes check-out & check-in)
 - Properties synchronization due to lifecycle change
 - Read-mappings (from file) occur when files are checked in
- Read-mappings may cause properties to become non-compliant, and therefore may disallow state changes

Interacting With Properties Demo

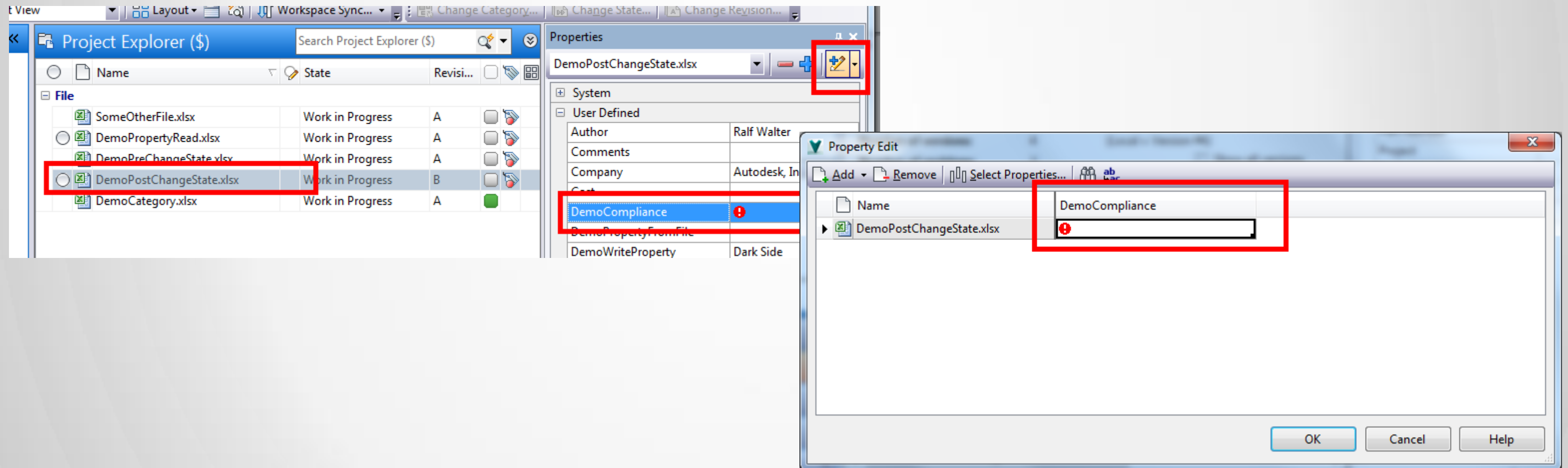
Interacting With Properties Demo

- Remember that failed state change from earlier?



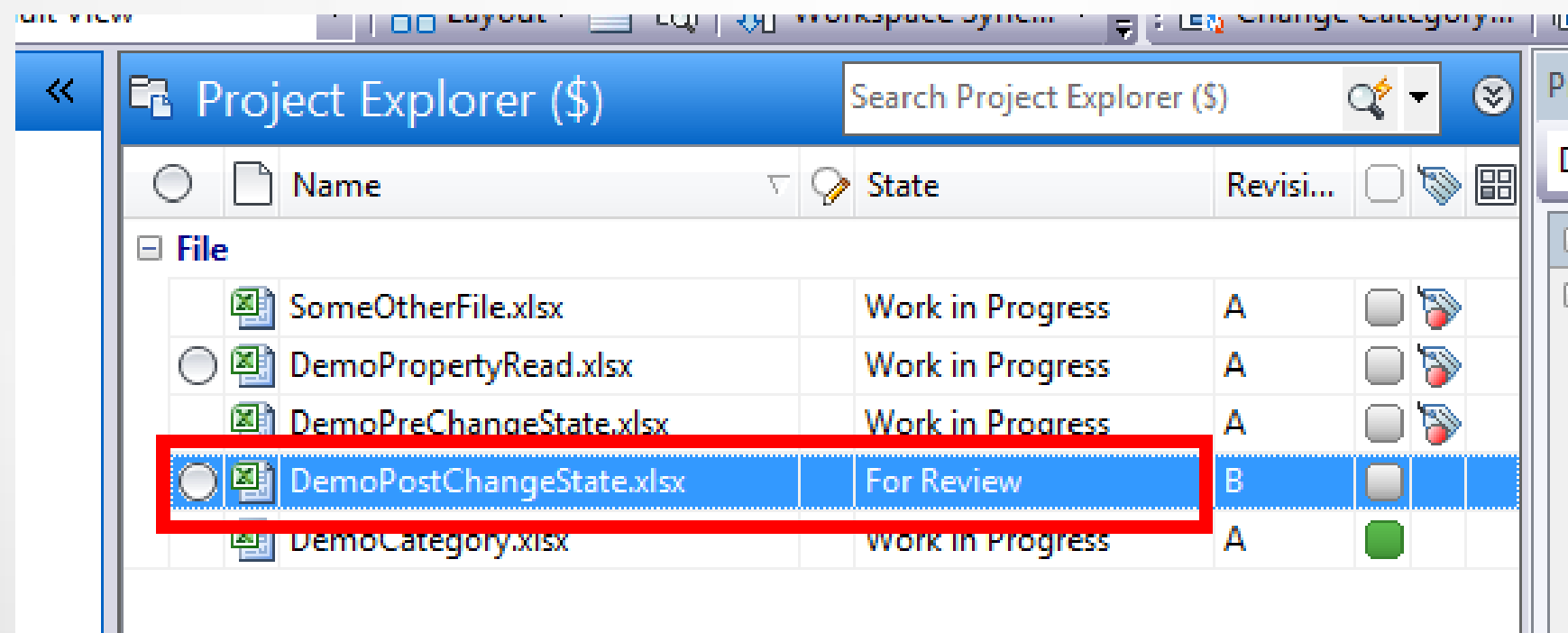
Interacting With Properties Demo

- Let's fix it by manually editing the property
- Select the Property Edit button in the property grid
- Give the property a value



Interacting With Properties Demo

- Now try the state change from “Work in Progress” to “For Review” again
- Success!



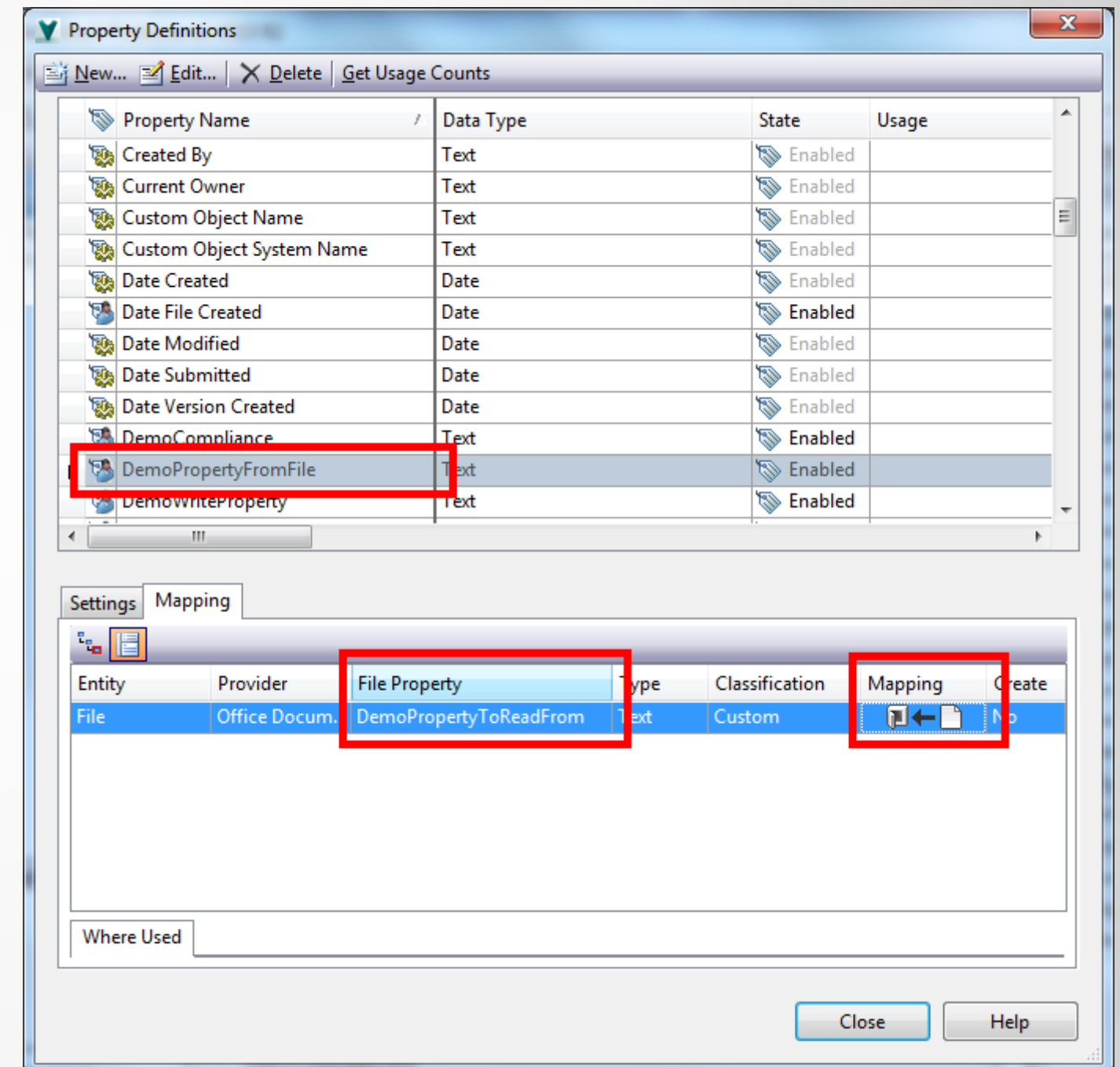
	Name	State	Revisi...
File			
	SomeOtherFile.xlsx	Work in Progress	A
	DemoPropertyRead.xlsx	Work in Progress	A
	DemoPreChangeState.xlsx	Work in Progress	A
	DemoPostChangeState.xlsx	For Review	B
	DemoCategory.xlsx	Work in Progress	A

Interacting With Properties Demo

- Automatic property edit
- One example we already saw was due to a lifecycle state change that synchronized properties
- Let's observe a read-mapping
 - When we check a file in

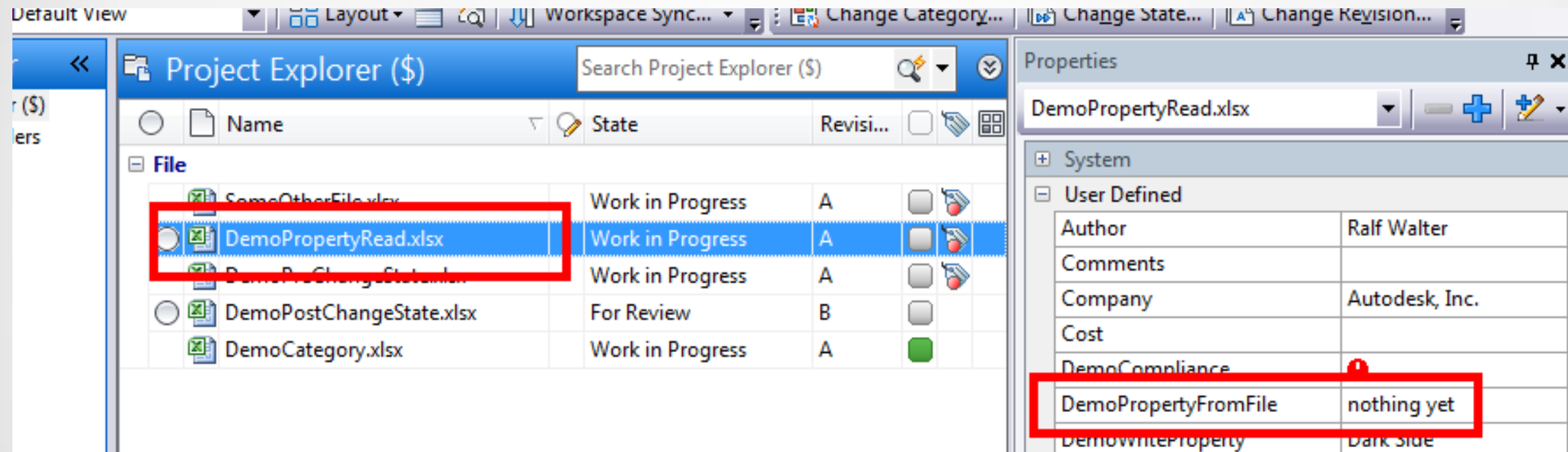
Interacting With Properties Demo

- “DemoPropertyRead.xlsx”
- Vault property is “DemoPropertyFromFile”, let’s take a look
- It’s maps to a property in the file called “DemoPropertyToReadFrom”
- The Vault from file icon denotes this is a read-mapping



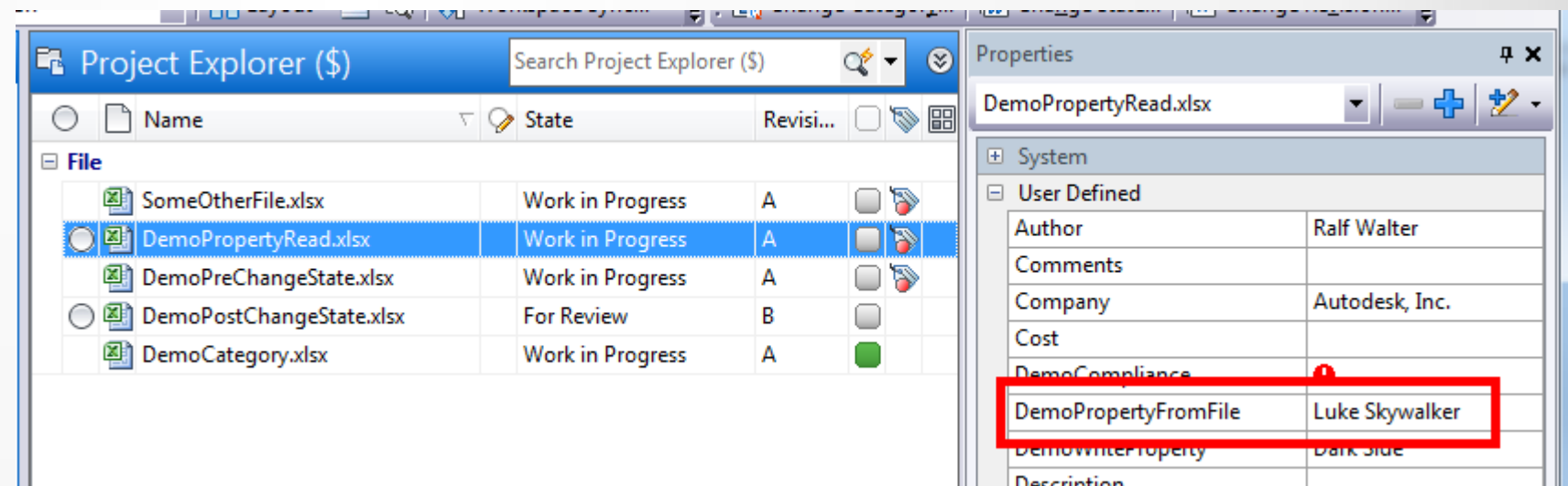
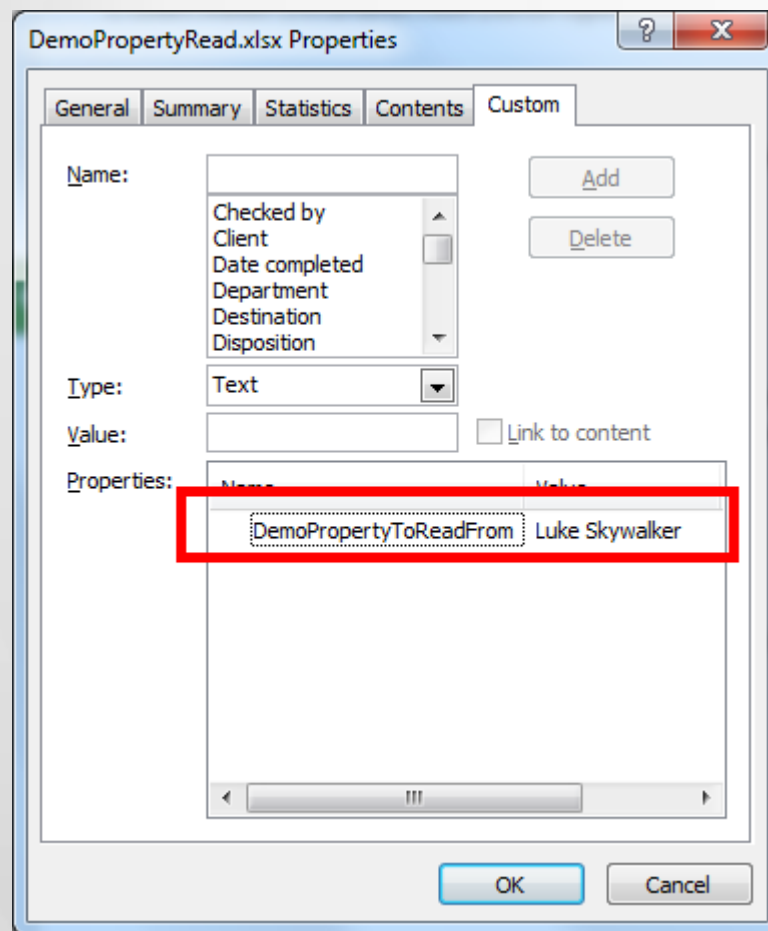
Interacting With Properties Demo

- It's Vault value is “nothing yet”



Interacting With Properties Demo

- Check out and open the file and modify the property
- Check the file in
- Success!



Conclusion

Key learning objectives met

- Understand how categories drive the initial behaviors of objects
- Understand how to use behavior change commands
- Understand how lifecycle changes affect other behaviors
- Interact with properties both manually and automatically

Related Classes

- Good material to download!
- PL10597 - Behaviors (101) for Younglings (yesterday)
- PL11664 - Behaviors 301 for the Jedi Master (tomorrow, 10:00-11:30)
- Other Vault Classes
 - PL10593 - Data Management Avengers III (tomorrow, 3:00-4:00)
 - PL11224 - Moving from Files to Items in Vault—Part 1 (yesterday, 5:00-6:00)
 - PL11458 - Moving from Files to Items in Vault—Part 2 (same time as this class)
 - PL11319 - Evolve with Vault: What's New in Vault 2016 (yesterday, 1:30-2:30)

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