



AUTODESK UNIVERSITY 2015

PL11319

Evolve with Vault: What's New in Vault 2016

Anil Chintamaneni
Autodesk

Learning Objectives

- Learn about changes in the Items and Bill of Materials area
- Learn about support for Inventor software's AnyCAD
- Learn about changes in Copy Design
- Learn about Rollback Lifecycle State Change for Files

Description

Vault software has had some major enhancements in the last year, especially in areas such as Items and Bill of Materials, Inventor Integration, Copy Design, and more. This class will give you an overview of some of these enhancements. Please note that in this class we will be going over some of the features that were introduced in Vault 2015 R2 software as these features are significant contributors to the evolution of Vault software.

Your AU Experts

Anil Chintamaneni is a senior user experience designer at Autodesk, Inc., where he works in the Product Lifecycle Management (PLM) group focusing mainly on the Vault software product line. Anil started his career at Autodesk in 2005. Since then he has worked on data management products such as Productstream Professional software and Vault. Prior to joining Autodesk, Anil worked as product data collaboration engineer at Ford Motor Company. Anil holds a Master of Science degree in mechanical engineering.

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Item & BOM improvements

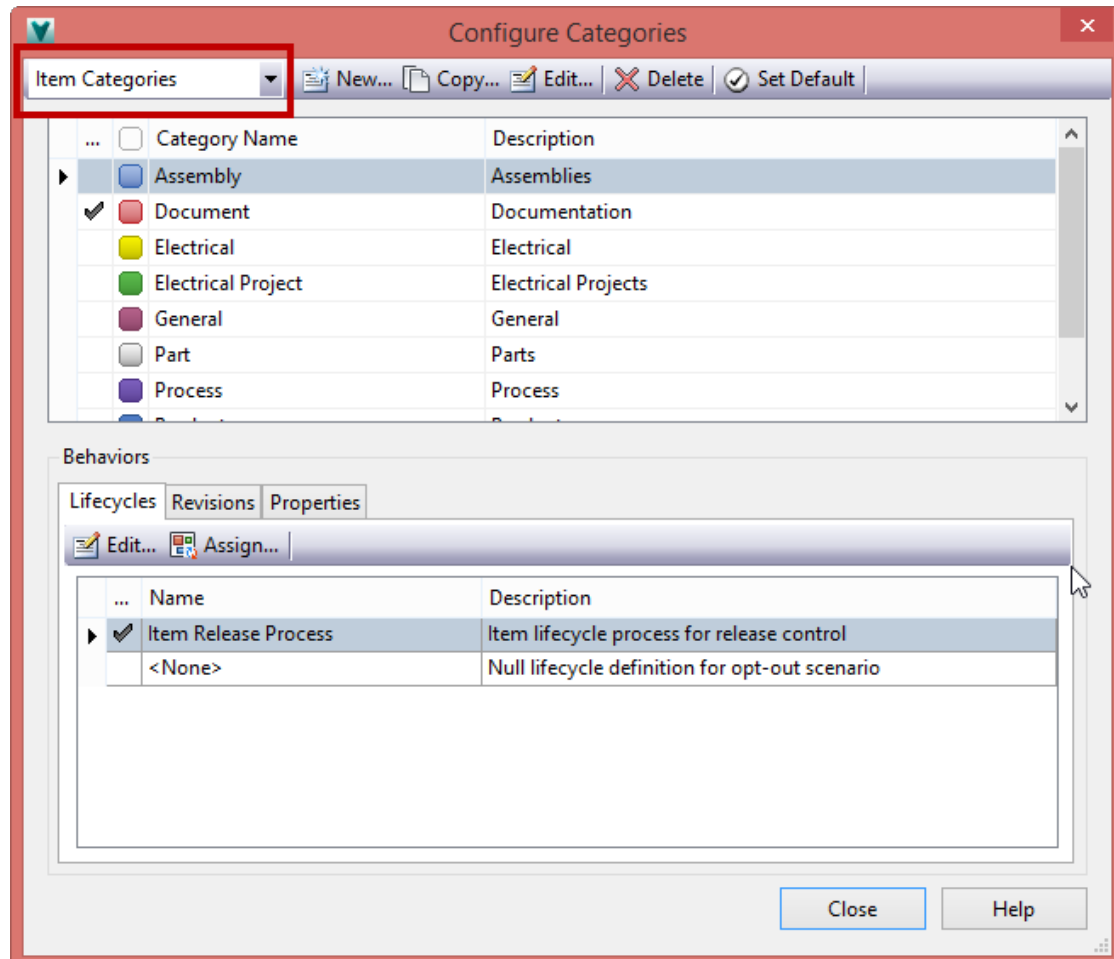
Lifecycles

Similar to files, folders and custom objects, lifecycles for items can now be administered and managed using common interface.

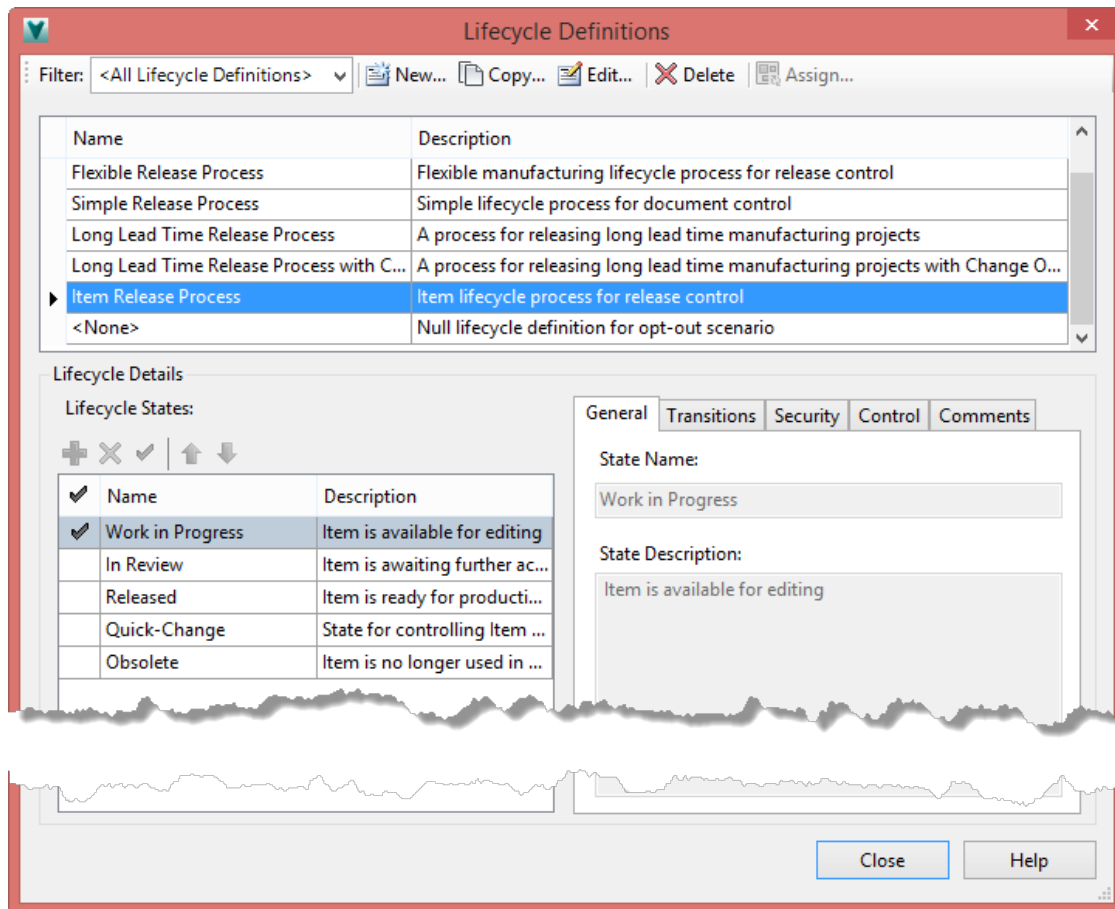
Administration

The interface to create definitions for item lifecycle states and revisions, configure lifecycle states and categories is the same as that of the administration interface for files, folders and custom objects.

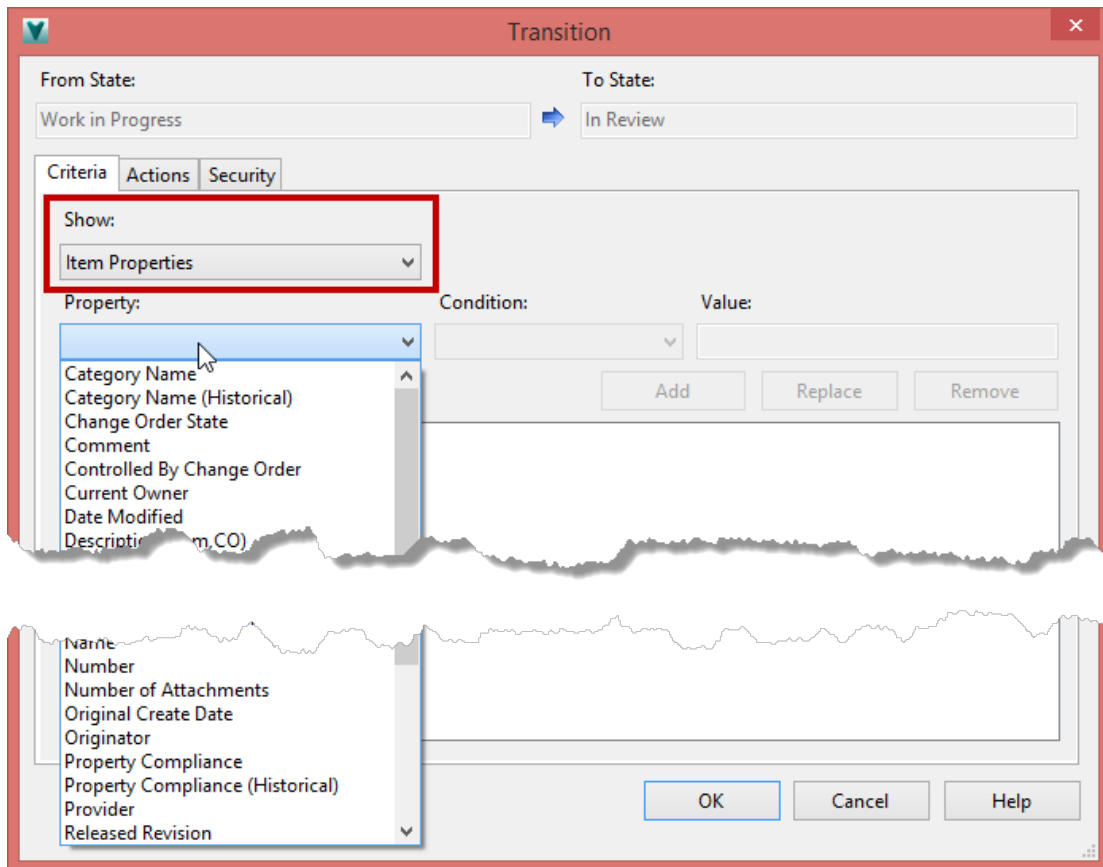
The definition, **Item Release Process** is available by default. In case of migrated vaults, all existing items will be assigned to this definition. All of the legacy item categories will be retained upon migration and they all are assigned by default to the lifecycle definition, Item Release Process and the revision scheme, **Standard Alphabetic Format**.



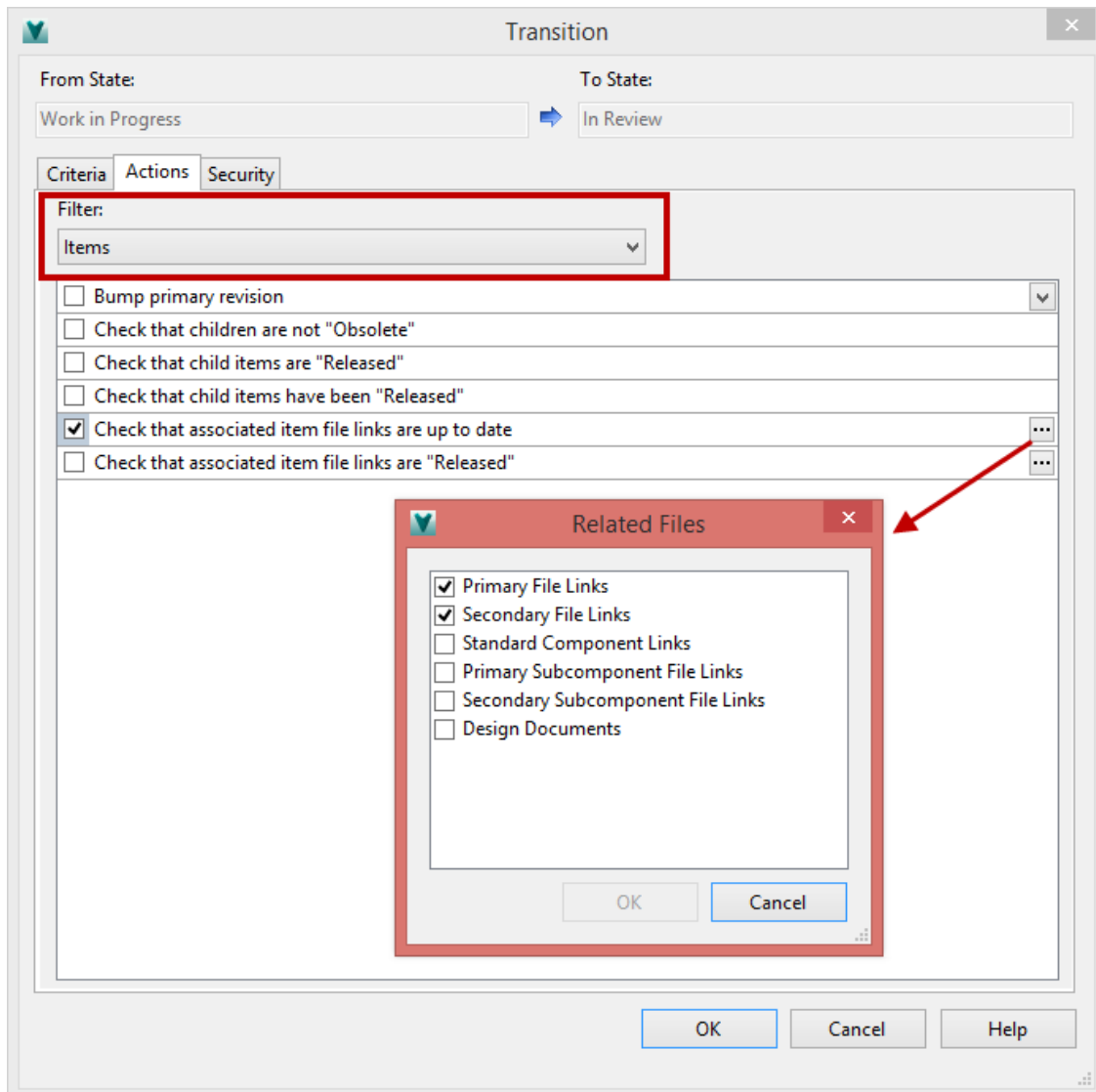
The definition, **Item Release Process** has all of the legacy lifecycle states for items as well as the **Quick-Change** state. The definition can be edited or new definitions can be created for items.



Lifecycle state transitions – item properties can be used when configuring criteria for lifecycle state transitions. And the interface on the **Criteria** tab has been improved to allow the administrator to filter properties based on the entity type they belong to.



Item specific actions can be defined for transitions. The **Actions** tab now shows item related actions that can be easily accessed by setting the filter to Items. Actions related to item's associated files can be configured in such a way that they are only applied to certain type of file links (as shown in the image below).



State-based security for items can be specified similar to how it is specified for files, folders and custom objects.

Lifecycle Definition - 'Item Release Process'

Definition Name: Item Release Process

Description: Item lifecycle process for release control

Category: Assembly, Document, Electrical, Electrical Project, Gener...

Lifecycle Details

Lifecycle States:

✓	Name	Description
✓	Work in Progress	Item is available for editing
	In Review	Item is awaiting further a...
	Released	Item is ready for producti...
	Quick-Change	State for controlling Item...
	Obsolete	Item is no longer used in ...

Security

General Transitions Security Control Comments

Name

- Administrator
- Dan Designer
- Ed Engineer

Add... Remove

Permission	Allow	Deny
Read	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Modify	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Delete	<input checked="" type="checkbox"/>	<input type="checkbox"/>

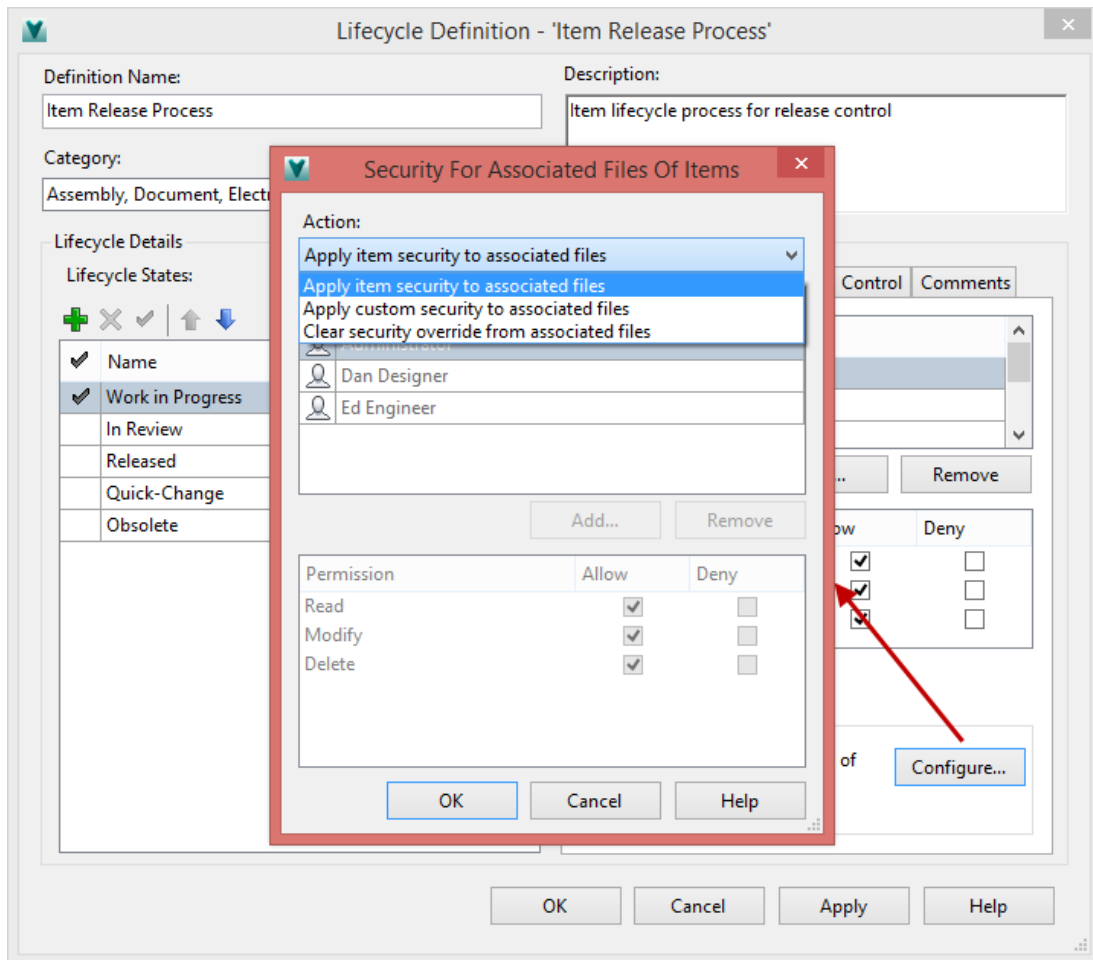
☐ No state-based security

Associated Files

☒ Security for associated files of items Configure...

OK Cancel Apply Help

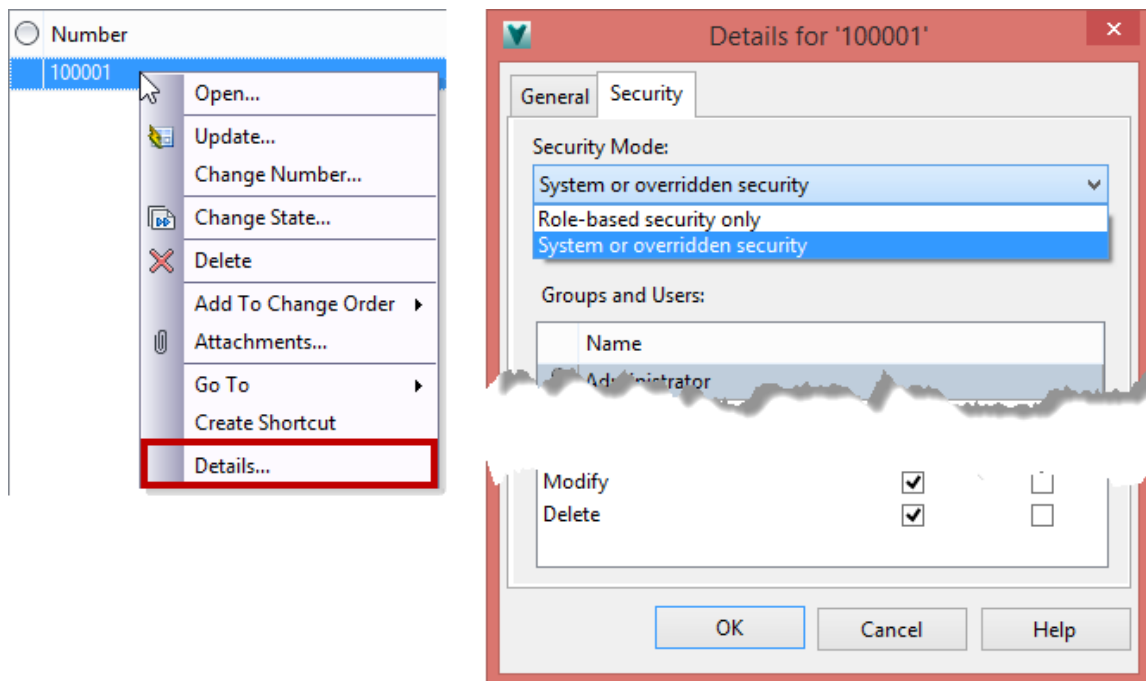
Additionally, using the **Associated Files** section, administrator can configure security for item's associated files based on the lifecycle state of items. Using one of the available options, administrator can apply the state-based security of items to their associated files, or define custom security for associated files based on item's lifecycle state or remove the security override (state-based or manual) that's there on the associated file.



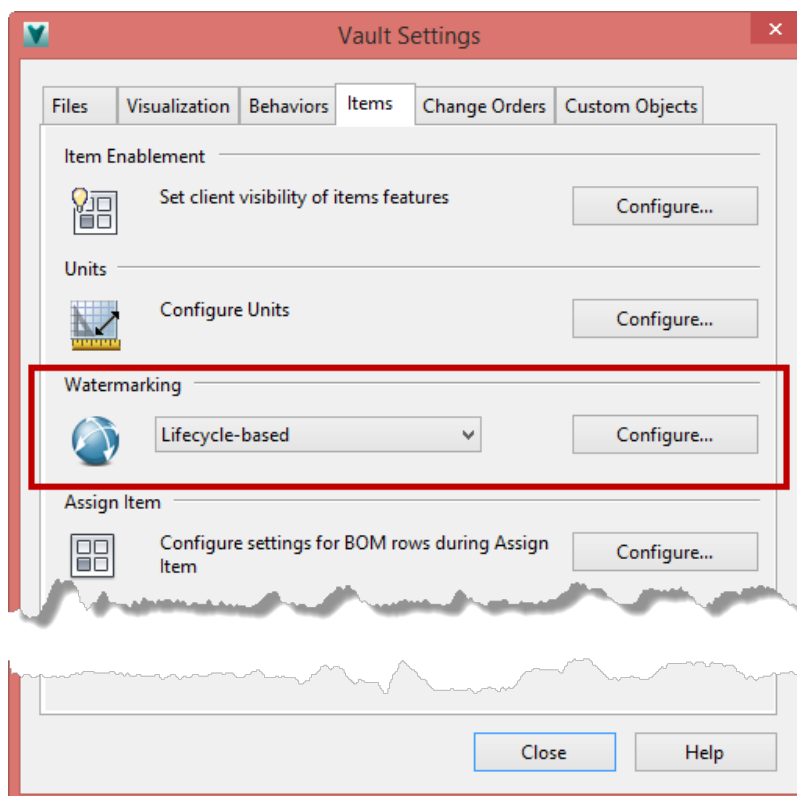
To know more about administration of lifecycles, refer to [Vault Help here](#).

Item Details – by accessing the **Details** command on the right-click menu of an item and the Security tab on the Details dialog, Administrator can not only view the active access control (ACL) list for the item but also set an override and define a separate ACL for the item.

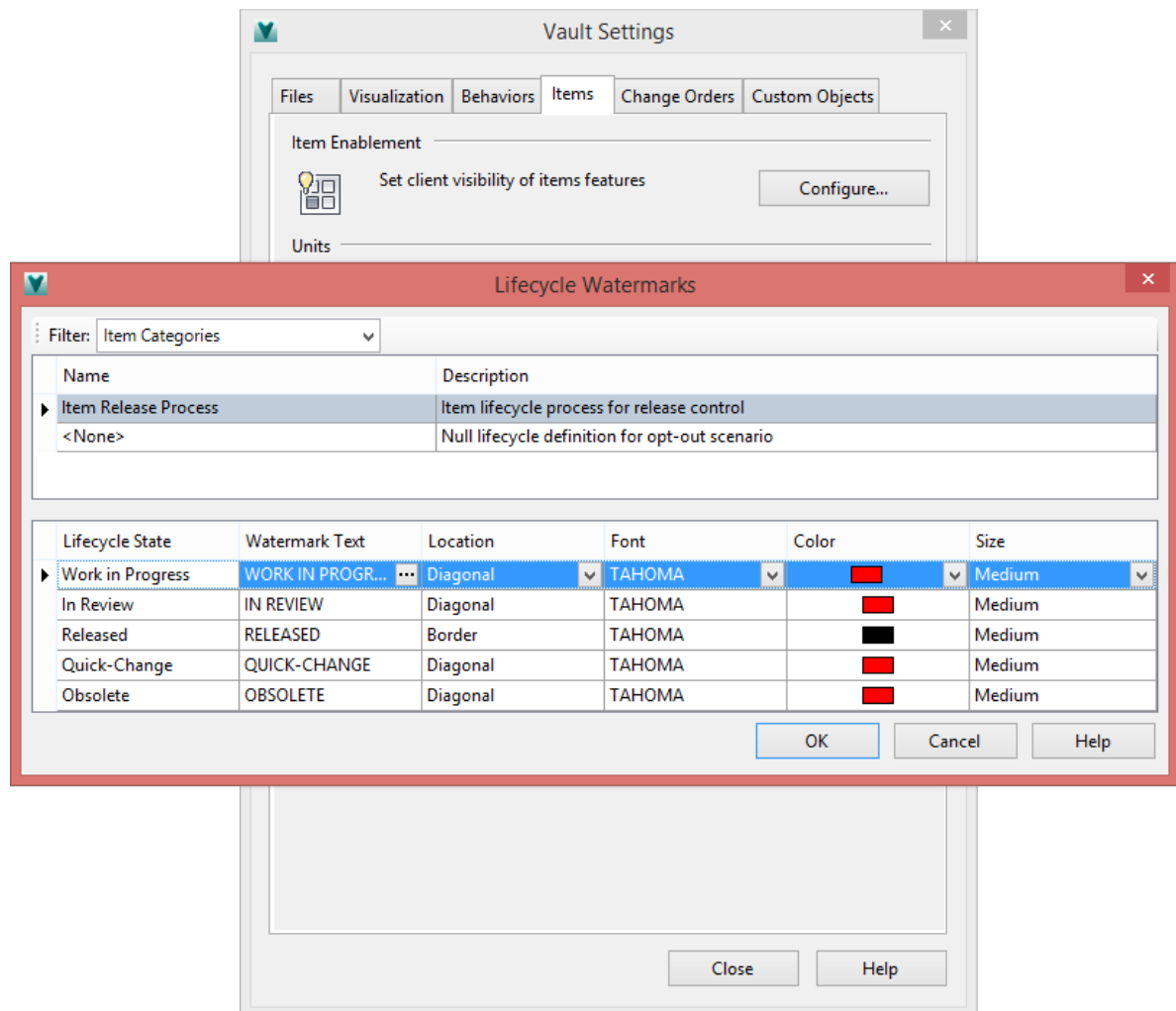
Note: The override will be removed when the item's lifecycle state is changed and new ACL will be applied based on the security definition for the new state.



Watermarking – it can now be configured based on any lifecycle definition that is assigned to an item category.

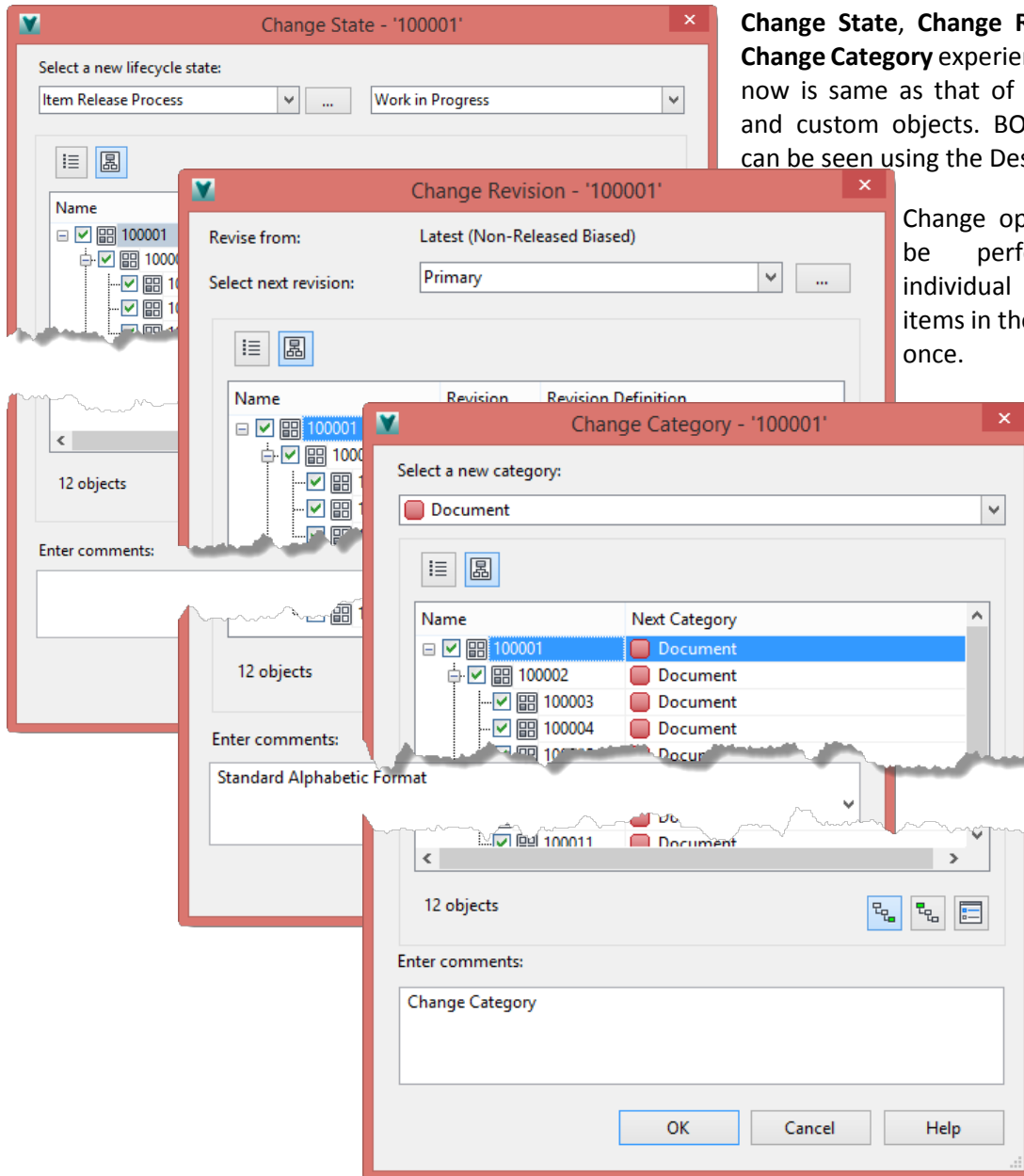


Administrator can configure watermarks for individual states within a lifecycle definition using the new interface.



End-user

Apart from Administrative interface for item lifecycles, revisions and categories, the end-user interface for item-related operations such as **Change State**, **Change Revision** and **Change Category** are unified as well.

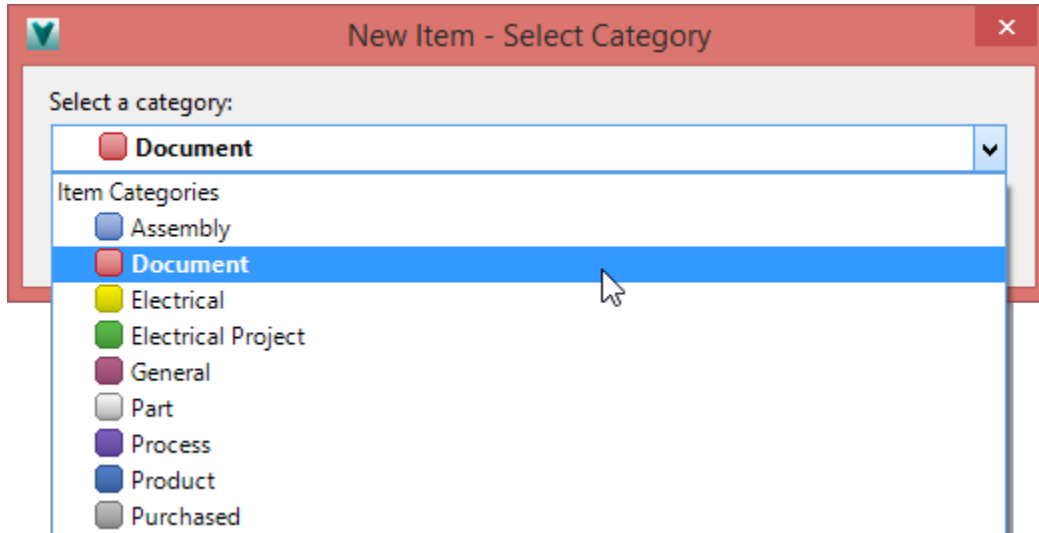


Change State, **Change Revision** and **Change Category** experience for items now is same as that of files, folders and custom objects. BOM structure can be seen using the Design View.

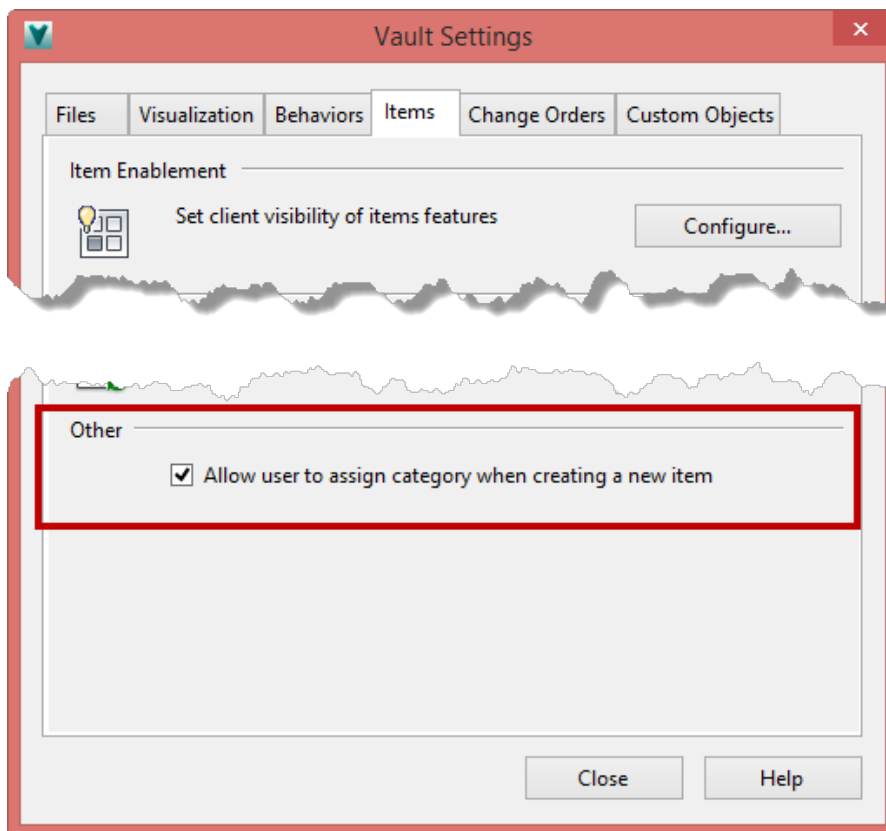
Change operations can be performed on individual items or all items in the structure at once.

Lifecycle definitions and revision schemes can be changed from within these dialogs. To know more about Lifecycles, revisions and categories, refer to [Vault Help here](#).

New item creation – when creating a new item, user has to choose a category for the item from the category selection dialog.

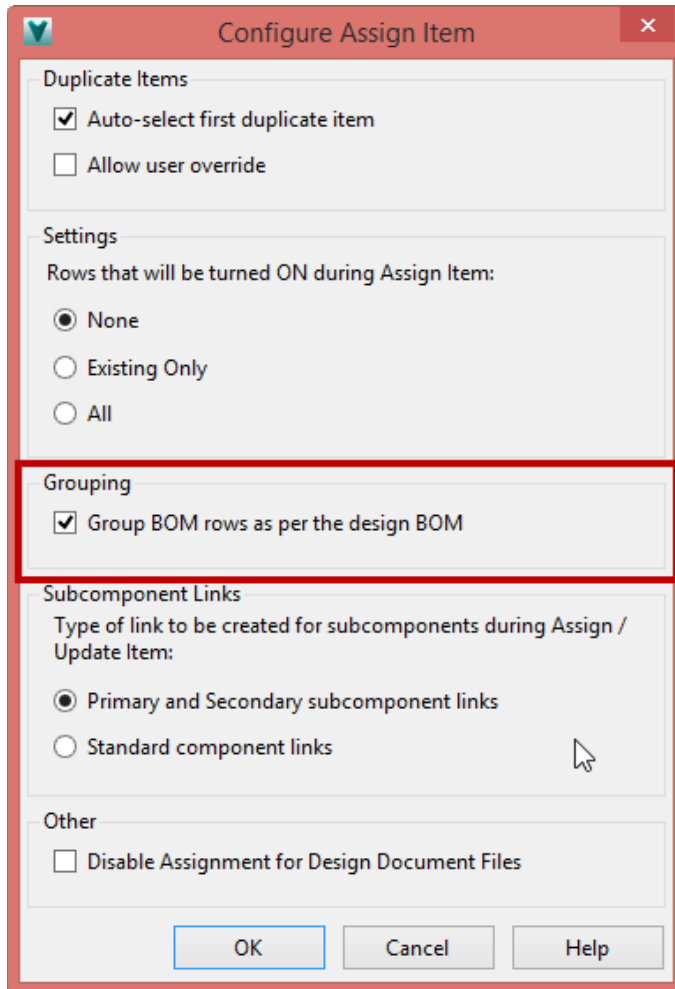


Administrator has the ability to allow or not allow user from selecting the category. When user is not allowed from selecting the category, the default category will be assigned to the item which can be changed after the item has been created.



Multiple BOM Rows

By default, regardless of how the BOM is shown inside CAD application, rows that belong to the same item under a given parent are merged inside Vault and their quantity is shown as the sum of quantity for individual rows. However, Vault can be configured to follow CAD BOM for merging rows. When administrator.



Configure Assign Item

Duplicate Items

- ☒ Auto-select first duplicate item
- ☐ Allow user override

Settings

Rows that will be turned ON during Assign Item:

- ☒ None
- ☐ Existing Only
- ☐ All

Grouping

- ☒ Group BOM rows as per the design BOM

Subcomponent Links

Type of link to be created for subcomponents during Assign / Update Item:

- ☒ Primary and Secondary subcomponent links
- ☐ Standard component links

Other

- ☐ Disable Assignment for Design Document Files

OK Cancel Help

Once configured, Vault BOM will be shown based on the grouping inside CAD BOM. If rows with same item are grouped inside CAD BOM, they will be shown as a group inside Vault. If rows with same item are shown as individual rows inside CAD BOM, they will be shown as individual rows inside Vault with their individual properties.

Blower Design - Work In Progress

File Edit View Actions Help

Save Exit Edit Mode Mechanical Bill of Mat...

General History Bill of Materials Where Used Change Order View

Latest Work In Progress Today Multi-Level All Rows

Number	Row Order	Position Number	Quantity
Blower Design	-	-	-
SM - 001	1	1	1 Each
SM - 002	2	2	1 Each
01	3	3	1 Each
ANSI B27.7 - 13	18	18	1 Each
BF - 002	19	43	1 Each
ANSI 2x2x 3_16	19.0		389.189 Inch
ANSI B18.3 - 1/4-20 UNC - 0.625	20	32	10 Each
ANSI B18.22.1 - 1/2 - wide - Type A	21	33	8 Each
ANSI B18.21.1 - 0.5			8 Each
ANSI B18.3 - 1/2-20 UNF - 2			4 Each
ANSI B18.2.2 - 1/2 - 20			4 Each
ANSI B18.22.1 - 3/8 - wide - Type B			4 Each
ANSI B18.21.1 - 0.375	26	38	4 Each
ANSI B18.3 - 3/8-24 UNF - 1	27	39	4 Each
SM - 004	28	40	1 Each
USAS B17.1 - 5/16 x 1/4 x 1 3/8	29	41	1 Each
ANSI B18.3 - No. 10-32 - 1/4	30	42	19 Each

Rows of same item as a group inside Vault

Blower Design - Work In Progress

File Edit View Actions Help

Save Exit Edit Mode Mechanical Bill of Materials

General History Bill of Materials Where Used Change Order View

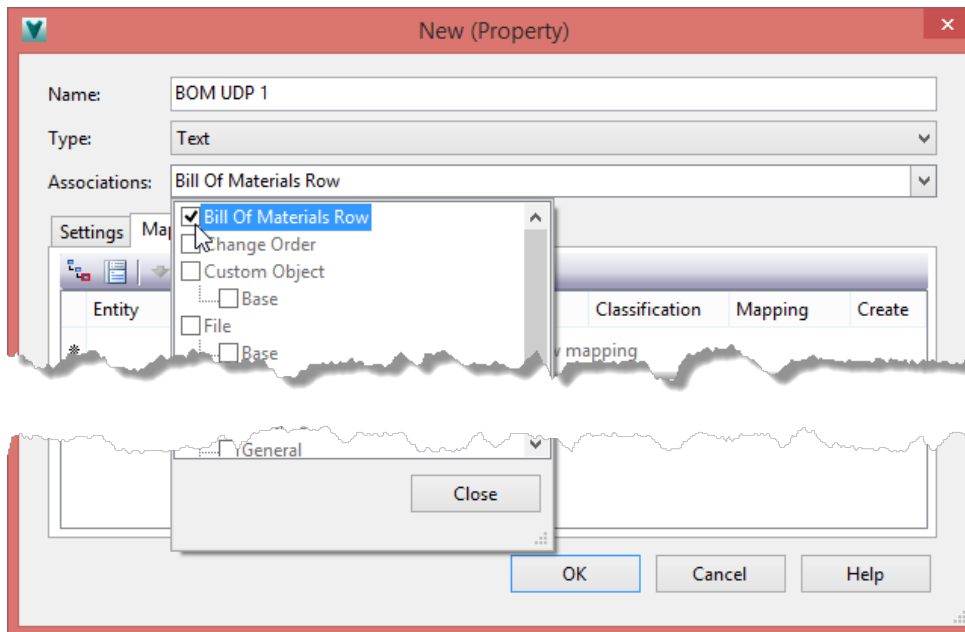
Latest Work In Progress Today Multi-Level All Rows

Number	Row Order	Position Number	Quantity
Blower Design	-	-	-
SM - 001	1	1	1 Each
SM - 002	2	2	1 Each
MA - 001	3	3	1 Each
ANSI B27.7 - 13	18	18	1 Each
BF - 002	20	43	1 Each
ANSI 2x2x 3_16	20.1	1	20.5 Inch
ANSI 2x2x 3_16	20.2	2	20.5 Inch
ANSI 2x2x 3_16	20.3	3	20.5 Inch
ANSI 2x2x 3_16			20.5 Inch
ANSI 2x2x 3_16			38.465 Inch
ANSI 2x2x 3_16			38.465 Inch
ANSI 2x2x 3_16			38.465 Inch
ANSI 2x2x 3_16	20.8	8	38.465 Inch
ANSI 2x2x 3_16	20.9	9	27.716 Inch
ANSI 2x2x 3_16	20.10	10	27.716 Inch
ANSI 2x2x 3_16	20.11	11	27.716 Inch
ANSI 2x2x 3_16	20.12	12	27.716 Inch
ANSI 2x2x 3_16	20.13	13	42.465 Inch
ANSI B18.3 - 1/4-20 UNC - 0.625	21	32	10 Each
ANSI B18.22.1 - 1/2 - wide - Type A	22	33	8 Each

Rows of same item as individual rows inside Vault

BOM Row Properties

While there are some default system properties like Quantity that can be specific to BOM rows, custom properties can be created for BOM rows and be mapped to properties in CAD file.

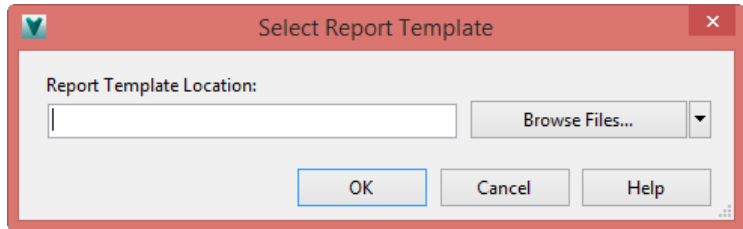
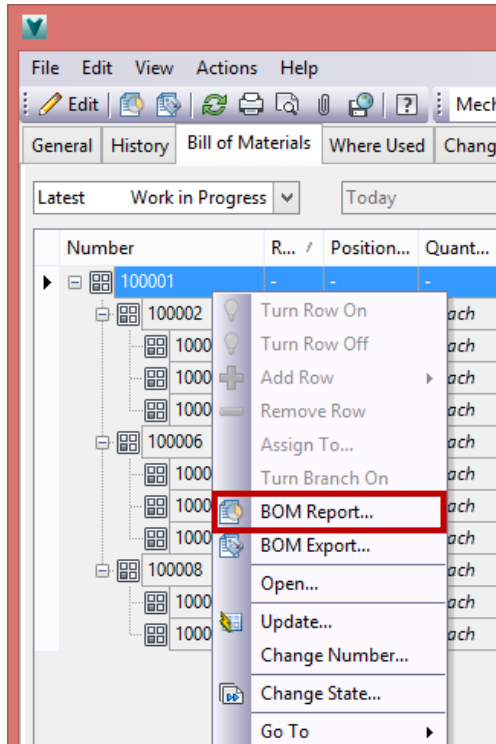


Using the new association, Bill of Materials Row, UDPs for BOM rows can be defined and the UDPs can be shown in the BOM grid. Only read mappings are allowed for BOM Row UDPs

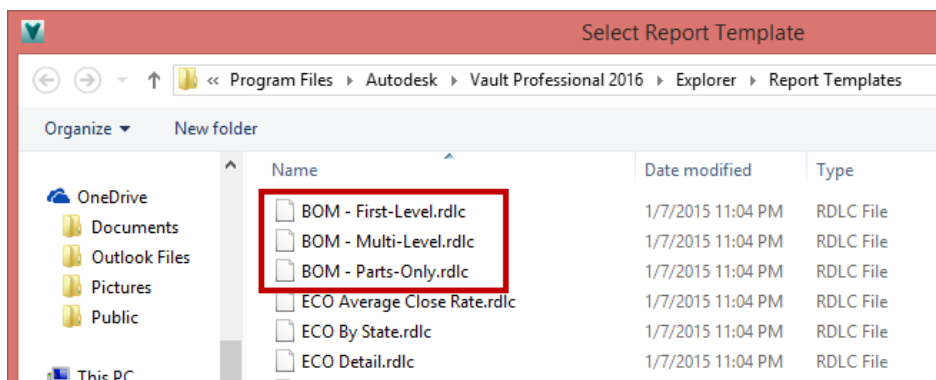
To know more about properties in Vault, refer to [Vault Help here](#).

BOM Reports

Reports can be run based on BOM views



The new command is available only from the BOM tab and only when the item is in read-only mode. Report templates can be chosen from either the disk or from Vault.

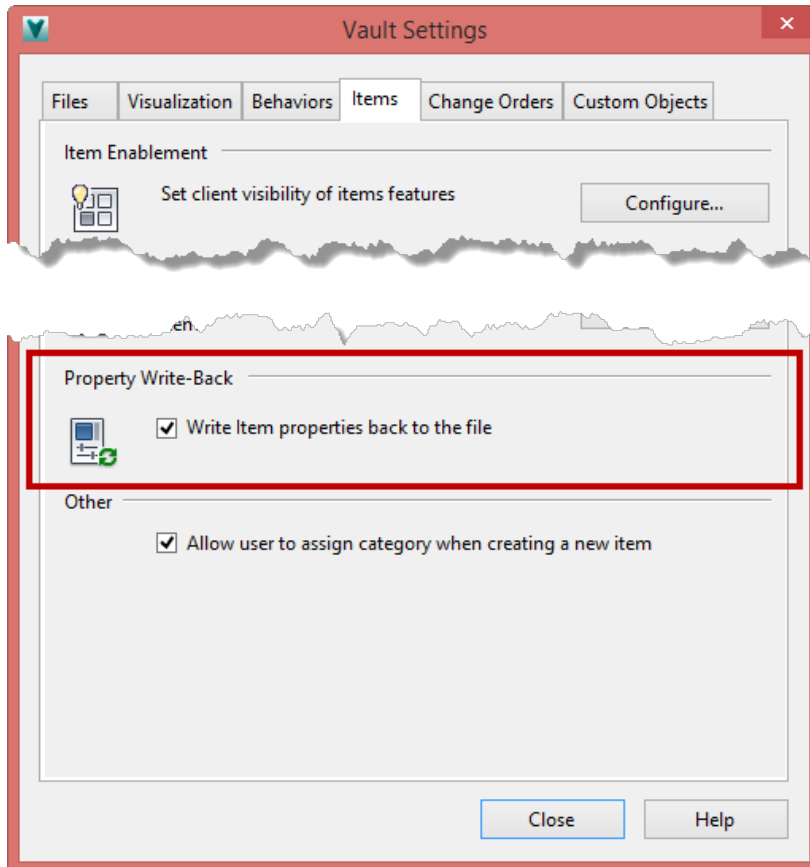


Three templates for three different BOM views will be available out-of-the-box. These templates can be customized or new templates can be created as per the needs of the organization.



Property Write-back

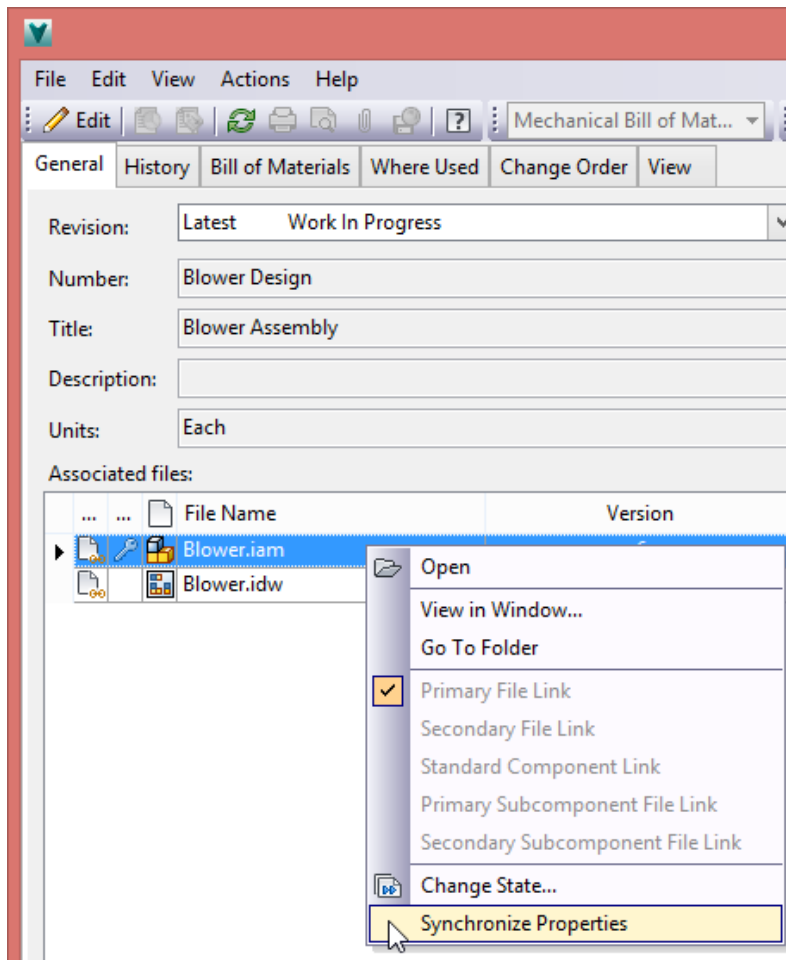
While write-back of item properties has been there in the CAD Add-Ins in previous releases, it was not possible to write-back item properties to files from within Vault Explorer before. The write-back of item properties can now be configured by the administrator.



This new check box allows administrator to turn on or off write-back of item properties to associated file. The check box is checked by default and when it's checked item properties are always written to files even in cases where there are file UDPs are mapped to files and they have higher priority. And the check box will be used by the Add-Ins as well as Vault Explorer.

For tertiary links, item properties will only be written back if the file is a tertiary link to only one item.

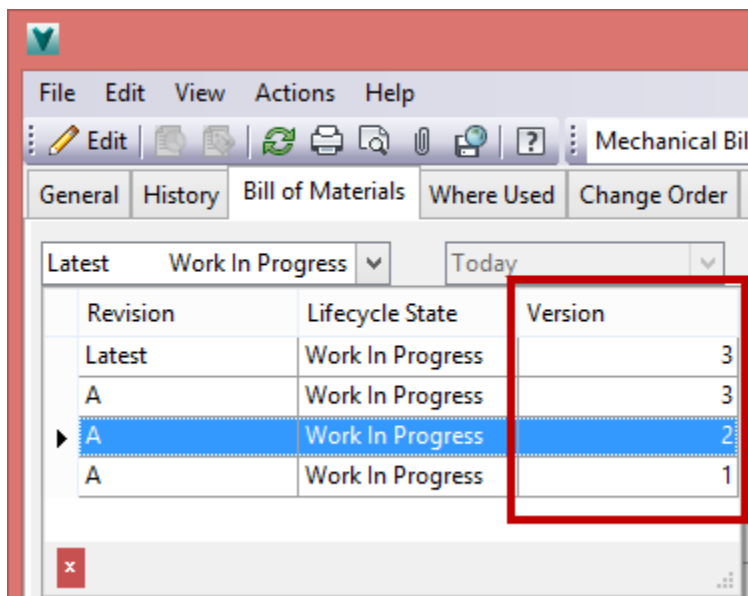
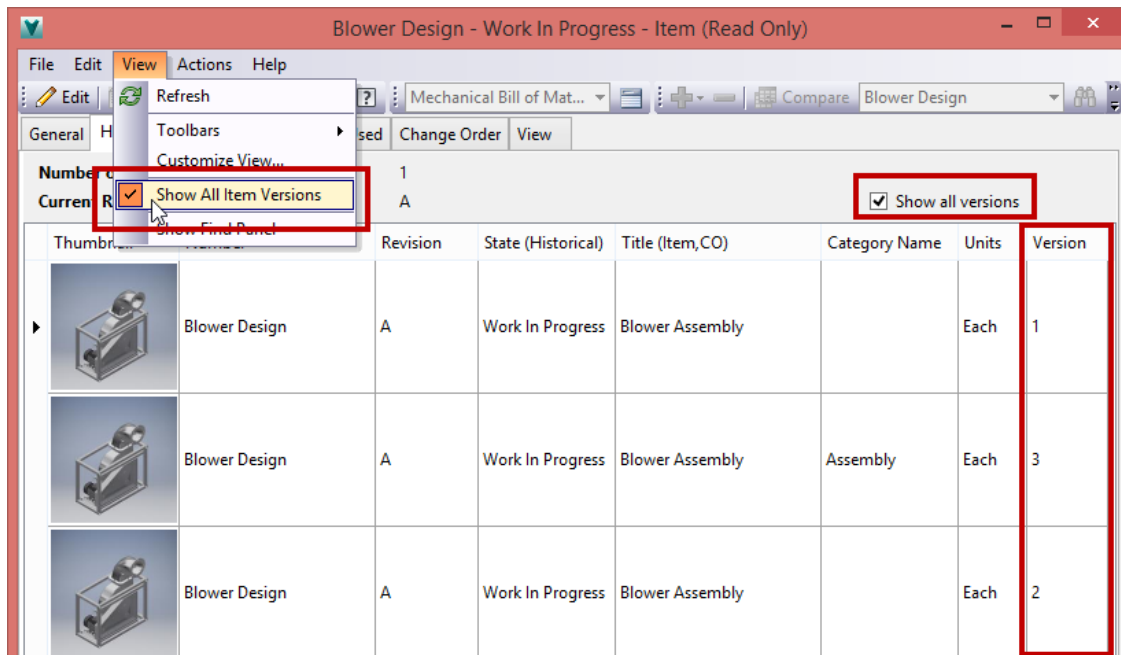
Writing back to Primary Subcomponent and Secondary Subcomponent links is not supported from Vault Explorer.



Item properties can be written back to the file using the legacy Edit Properties and Synchronize Properties commands in Vault Explorer. To make it easy for the items user, the command Synchronize Properties has been added to the right-click menu of an associated file of an item. The command is available only when the item is in read-only mode.

Item Iterations

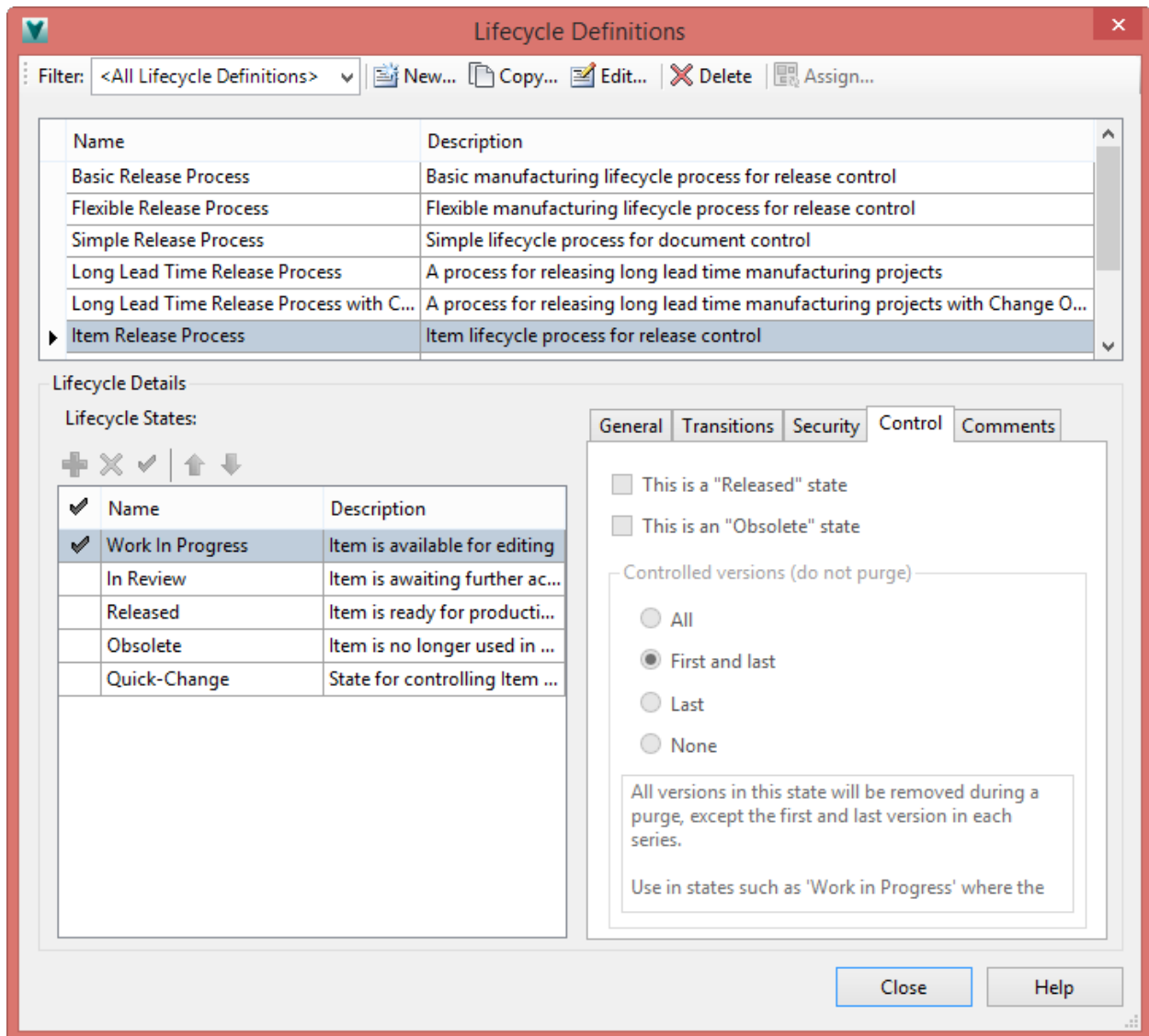
Similar to file versions, versions for items can now be seen inside Vault. The property, Version is available to be added to grids where items can be shown.



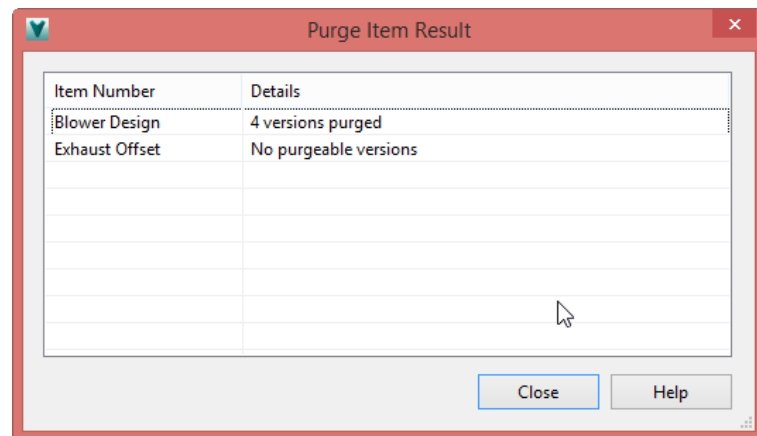
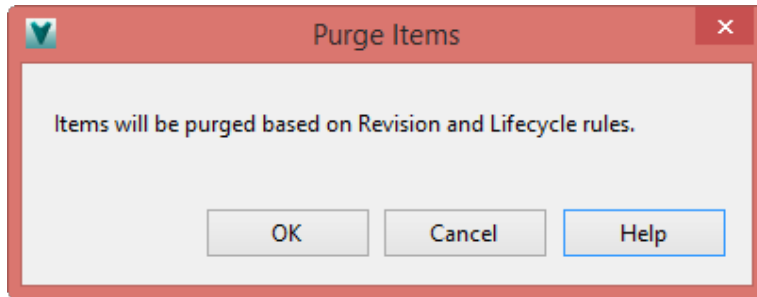
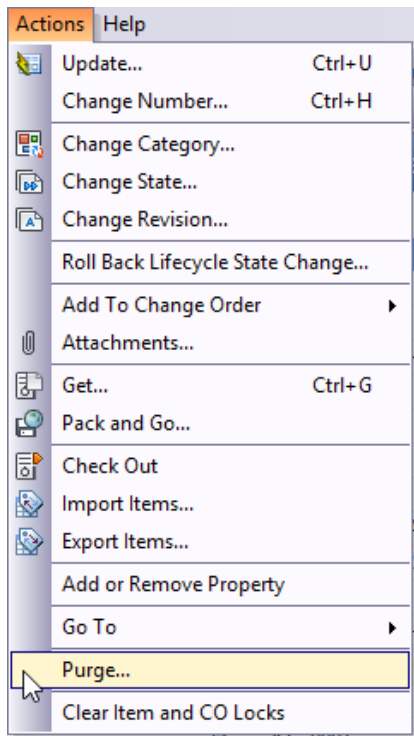
Version property is always shown on the Revision drop-down on the item dialog. Although by default only consumable versions are shown, the Show All Versions option allows the user to view all iterations of an item.

Purge

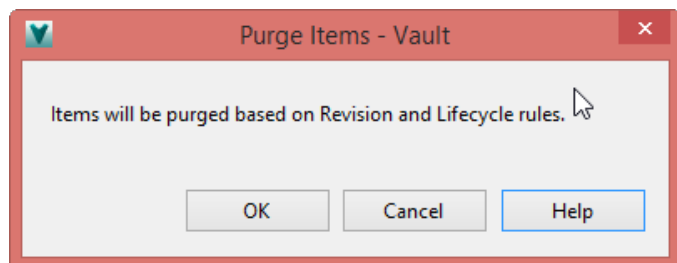
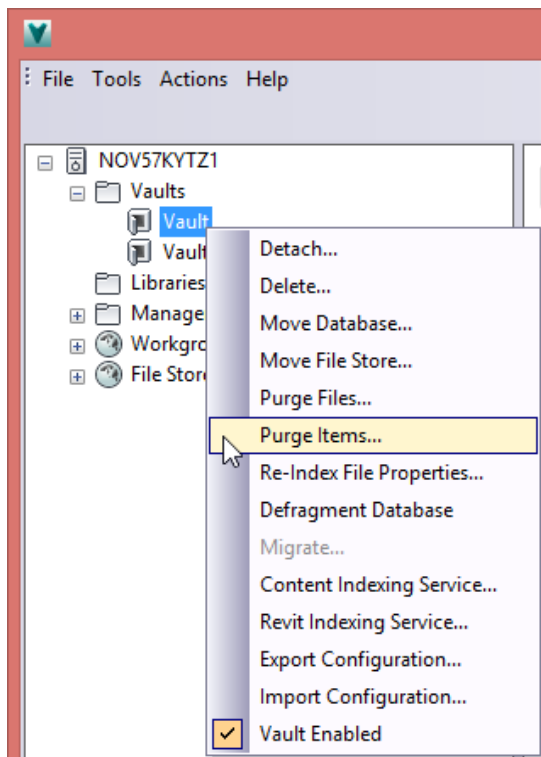
Items are not purged based on the settings on the Control tab for lifecycle states.



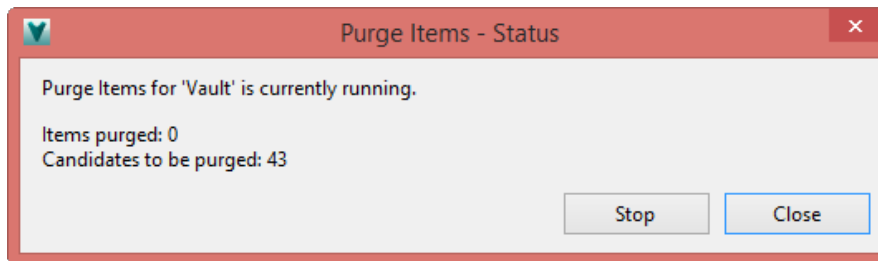
Purge one or more items – individual items can be purged by using the Purge command on the right-click menu of an item. Once selected, user will be informed that the items will be purged based on the lifecycle rules. And when the operation is complete, results dialog will appear with the items and the versions that were purged.



Purge all items



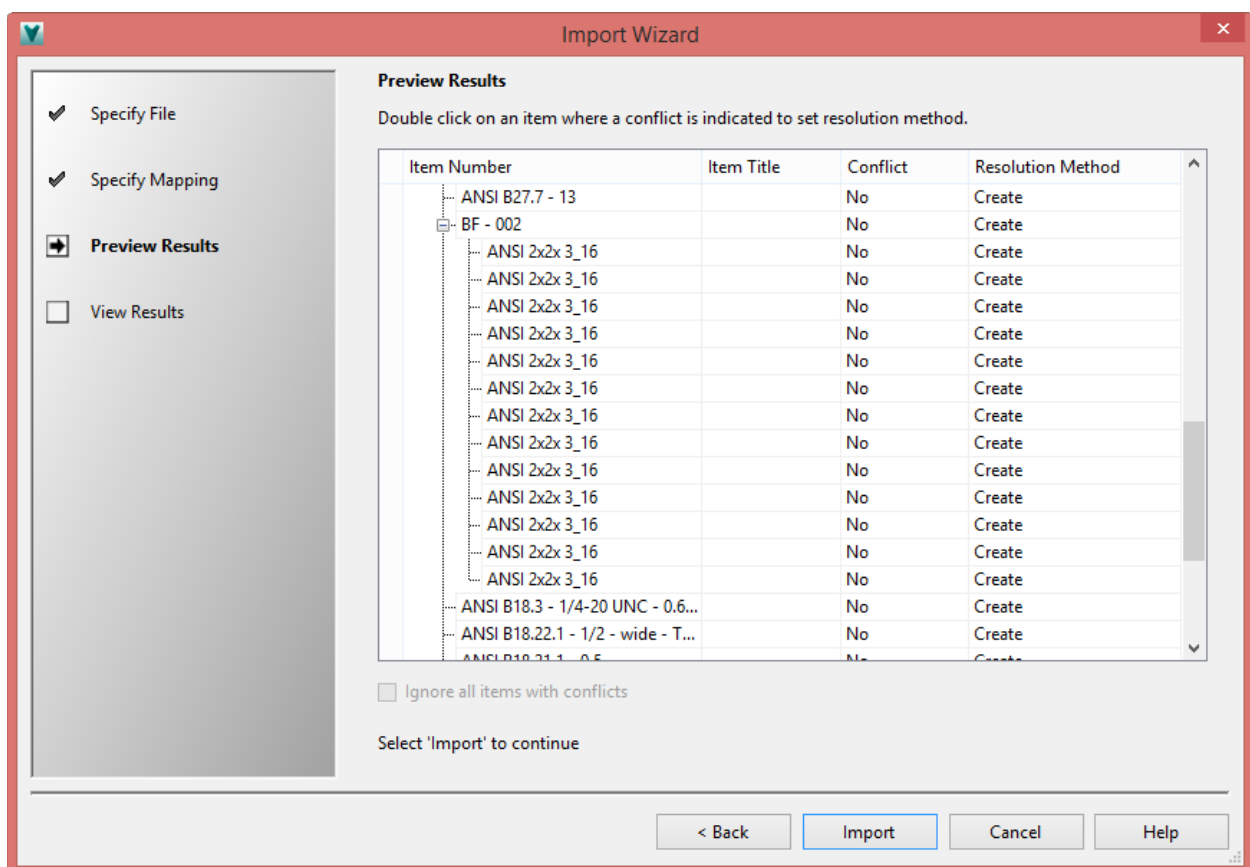
All items in a vault can be purged using the Purge Items command inside ADMS Console. Similar to the Purge command inside Vault Explorer, once selected, Administrator will be informed that the items will be purged based on the lifecycle rules.



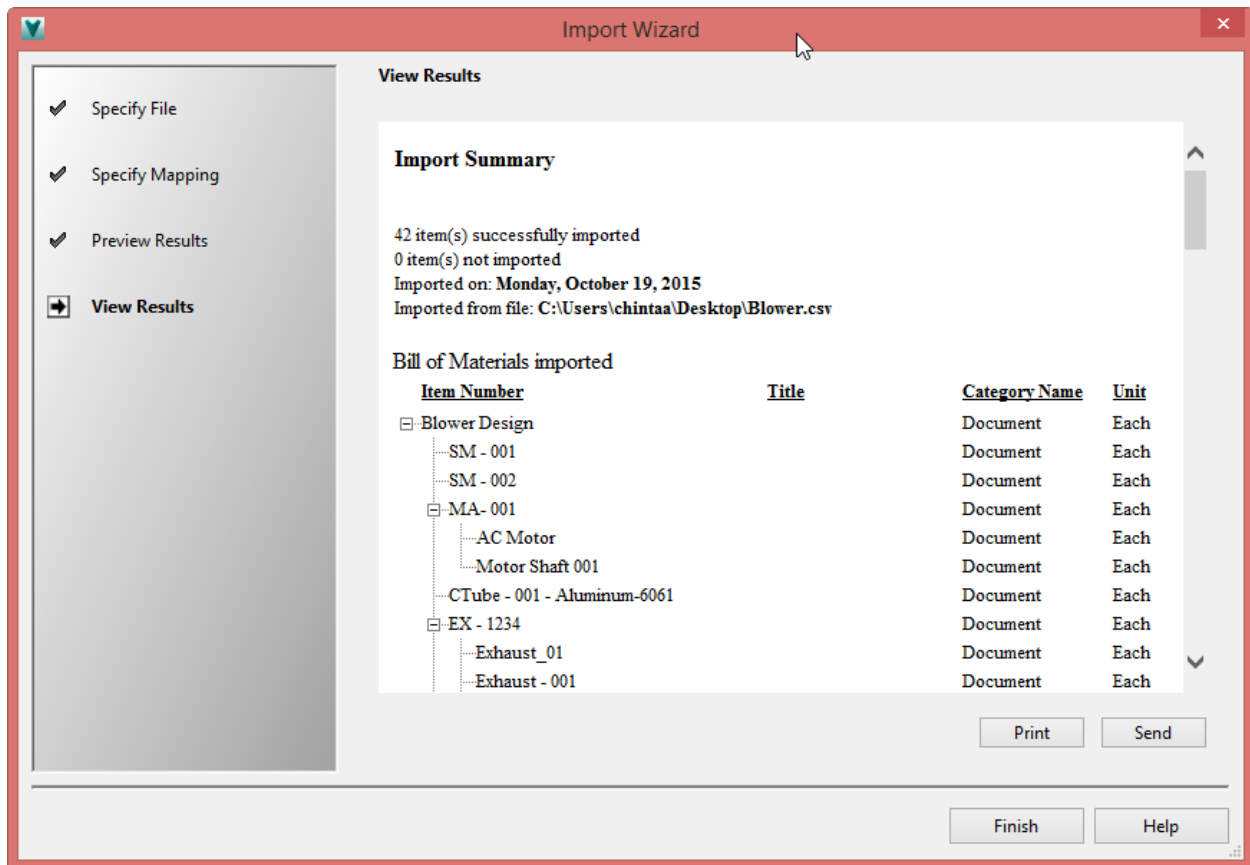
Status of Purge Items operation can be obtained by invoking the Purge Items command again and status dialog will appear as long as the operation hasn't finished yet.

Item Import

Item Import now works based on categories. If none of the existing item categories are specified in the import file, the default category will be assigned to the items and they will be assigned to the lifecycle definition the category is assigned to. If the category specified in the import file doesn't match any of the existing categories user will be asked to resolve the conflict by selecting one of the existing categories. BOMs having same item represented in multiple rows and with different BOM row properties can be imported using the Import wizard.



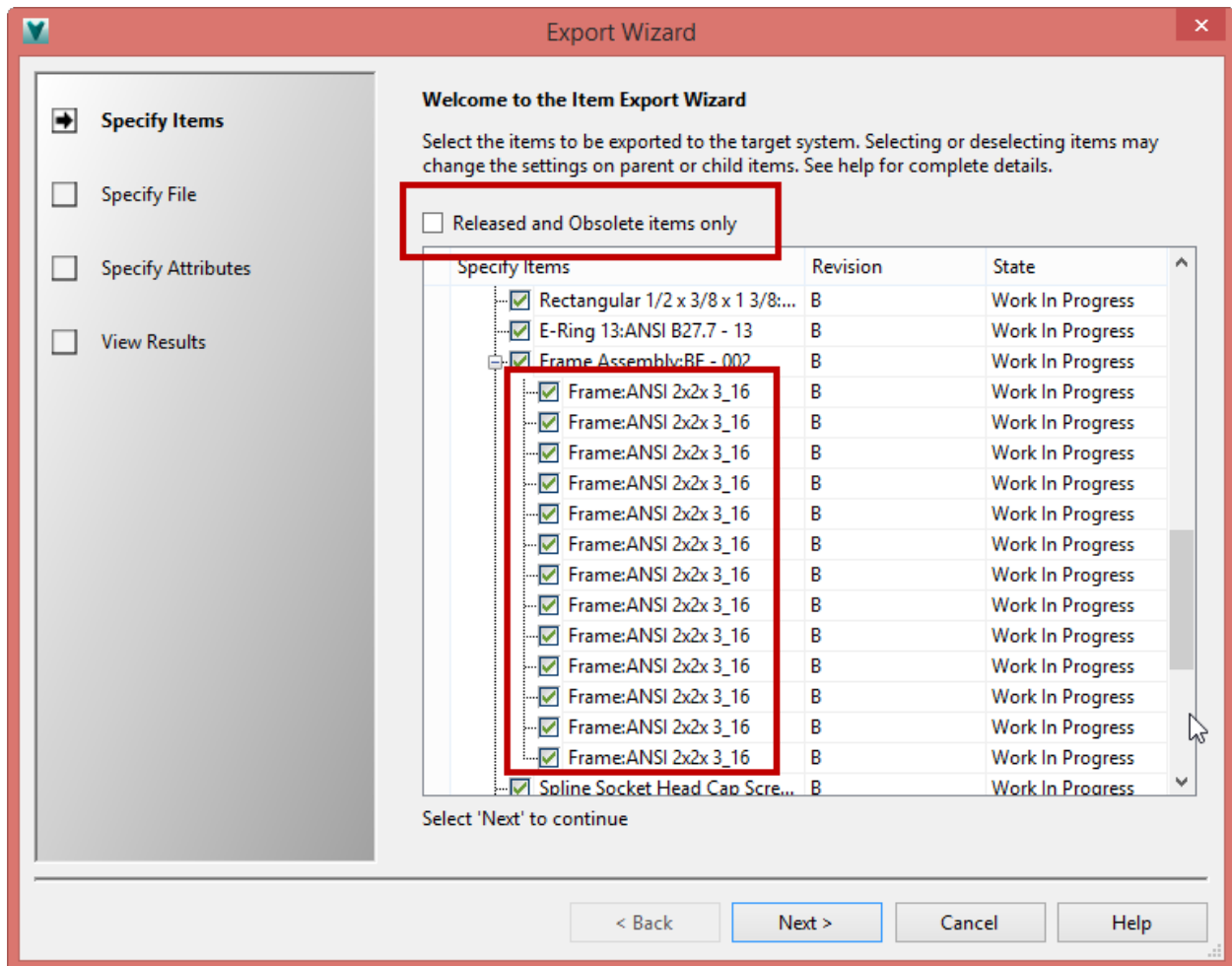
The summary page on the Import wizard has been updated to show items that have been imported and BOM that has been imported.



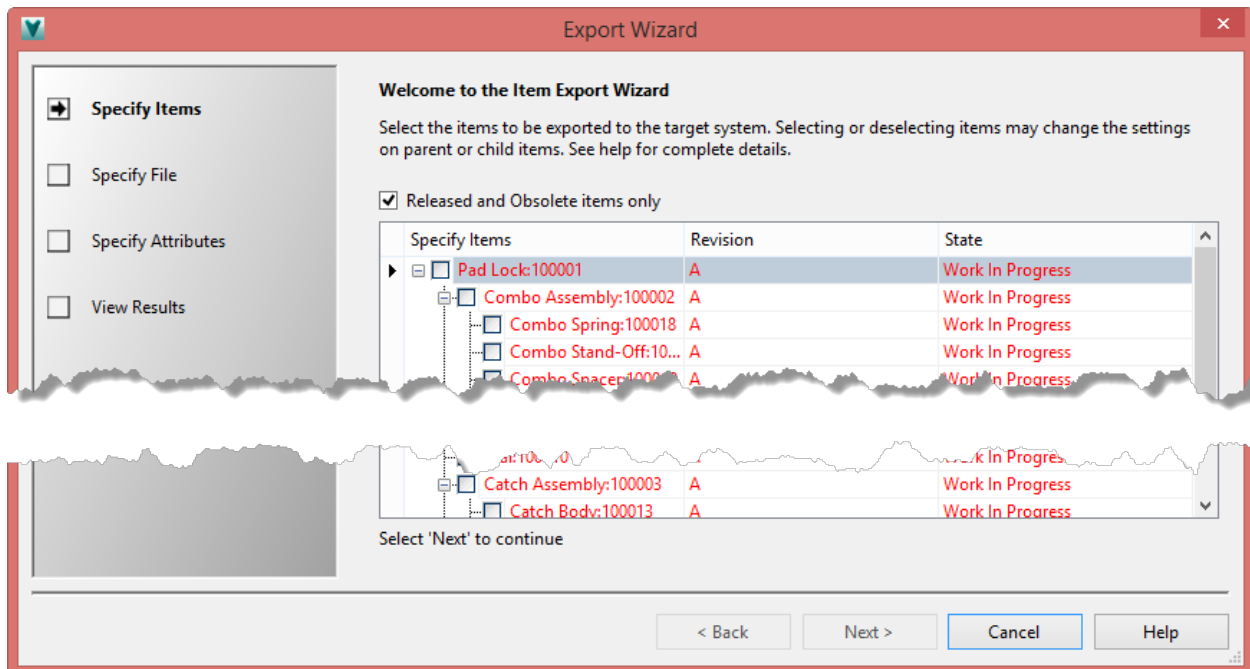
Item Export

Item Export has been updated to allow BOM row UDPs and BOMs with same item in multiple rows to be exported. Only On rows will be exported when exporting an item. While the default behavior is to export Released and Obsolete items only user has the option of exporting non-released items. When user unchecks the box for Released and Obsolete items only, BOM for the Latest revision of the item will be selected for export.

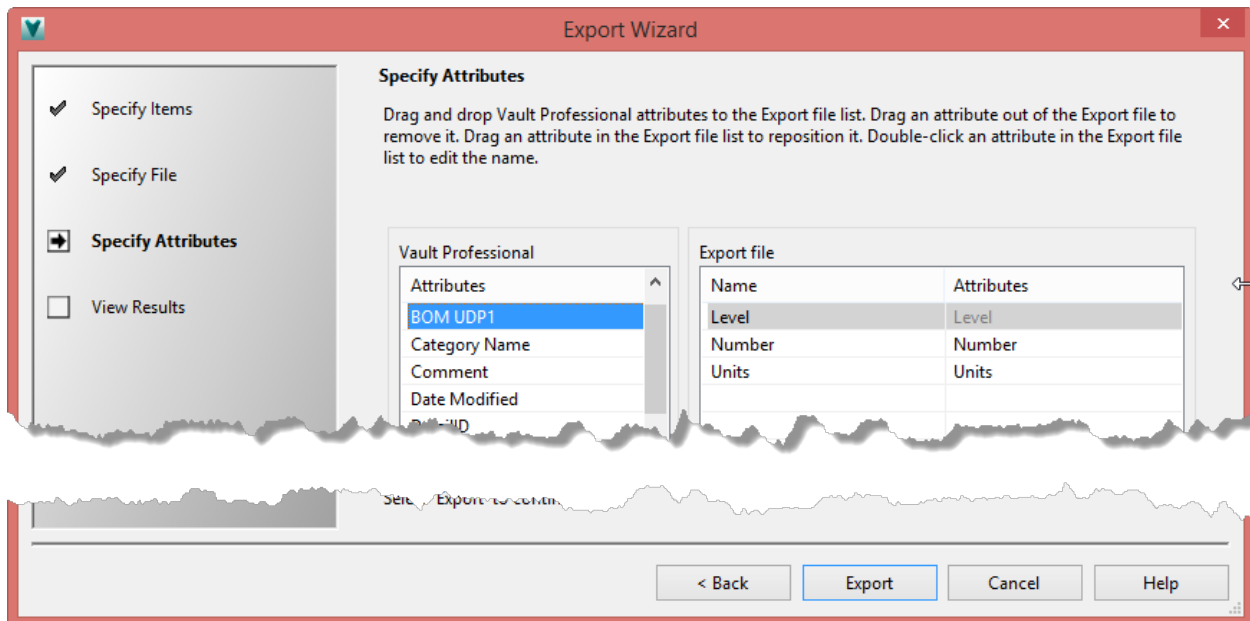


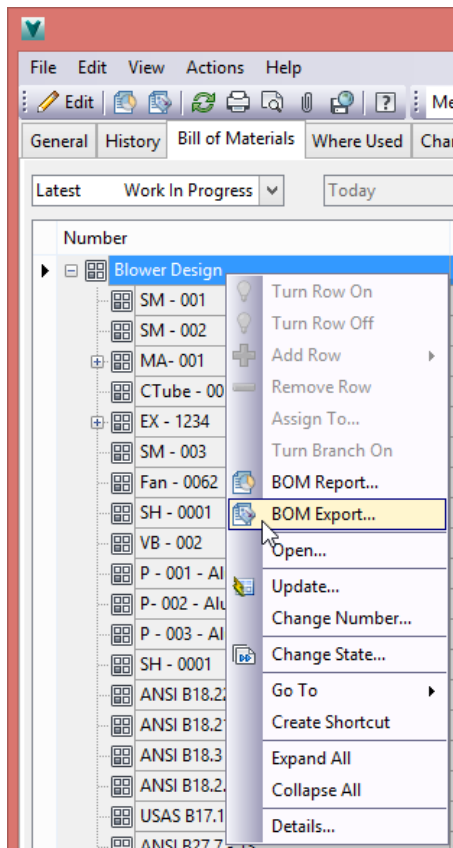


And if one or more items in the structure are not in Released or Obsolete states while the Released and Obsolete items only checkbox is checked, the corresponding rows will be shown in red and the Next button on the wizard will be disabled. By hovering over those rows user can view tooltip that will have information regarding why the items cannot be exported.



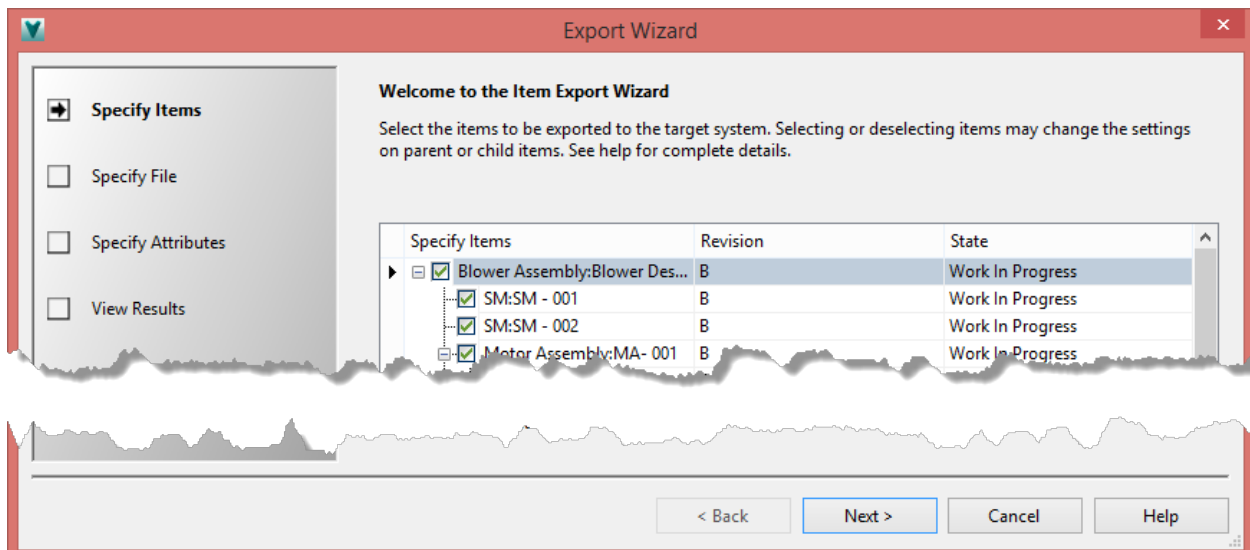
BOM Row UDPs are available on the Export wizard for selection for export.

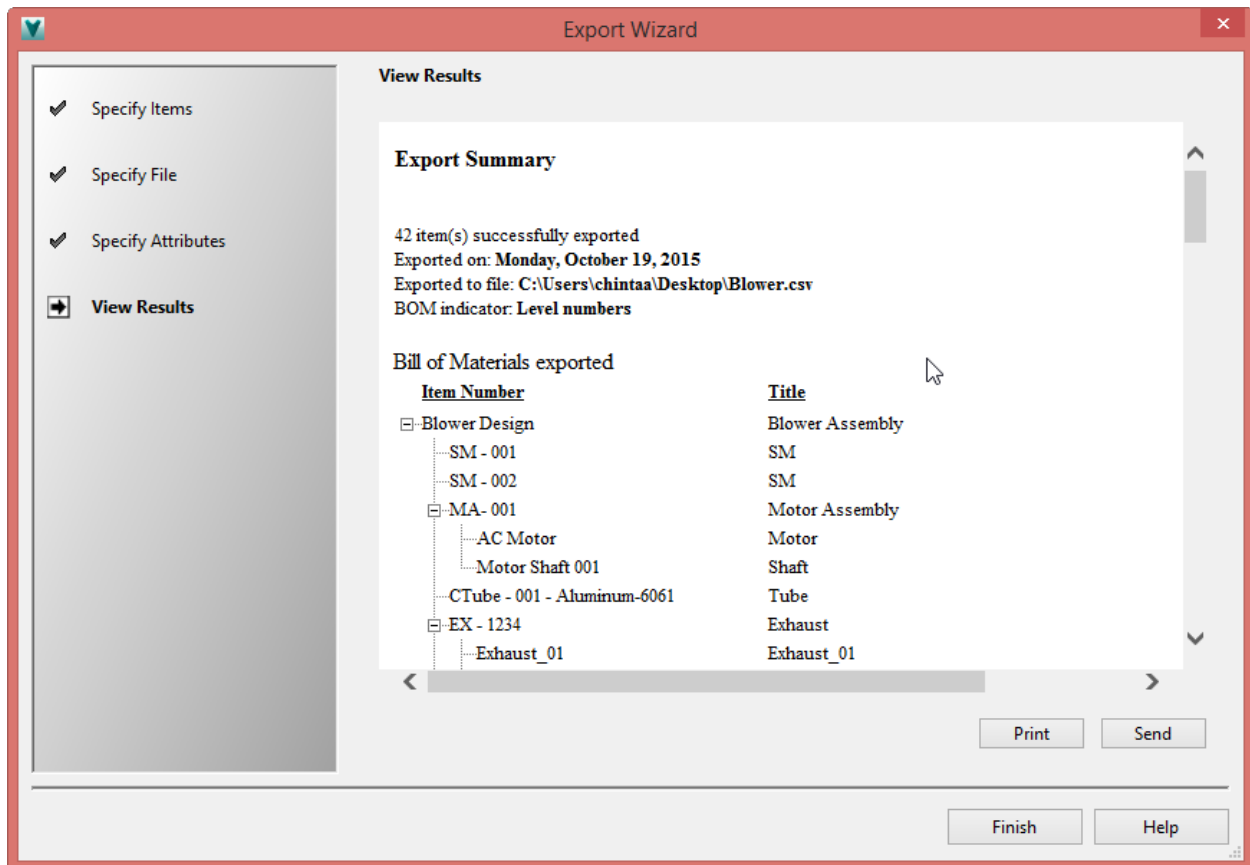




A new command, BOM Export is available on the BOM tab of an item and only when the item is in read-only mode. With this command, an item can be exported as it is shown in the BOM tab regardless of lifecycle states of the individual items. Historical revisions can be exported by switching to a revision of choice and then executing the new command.

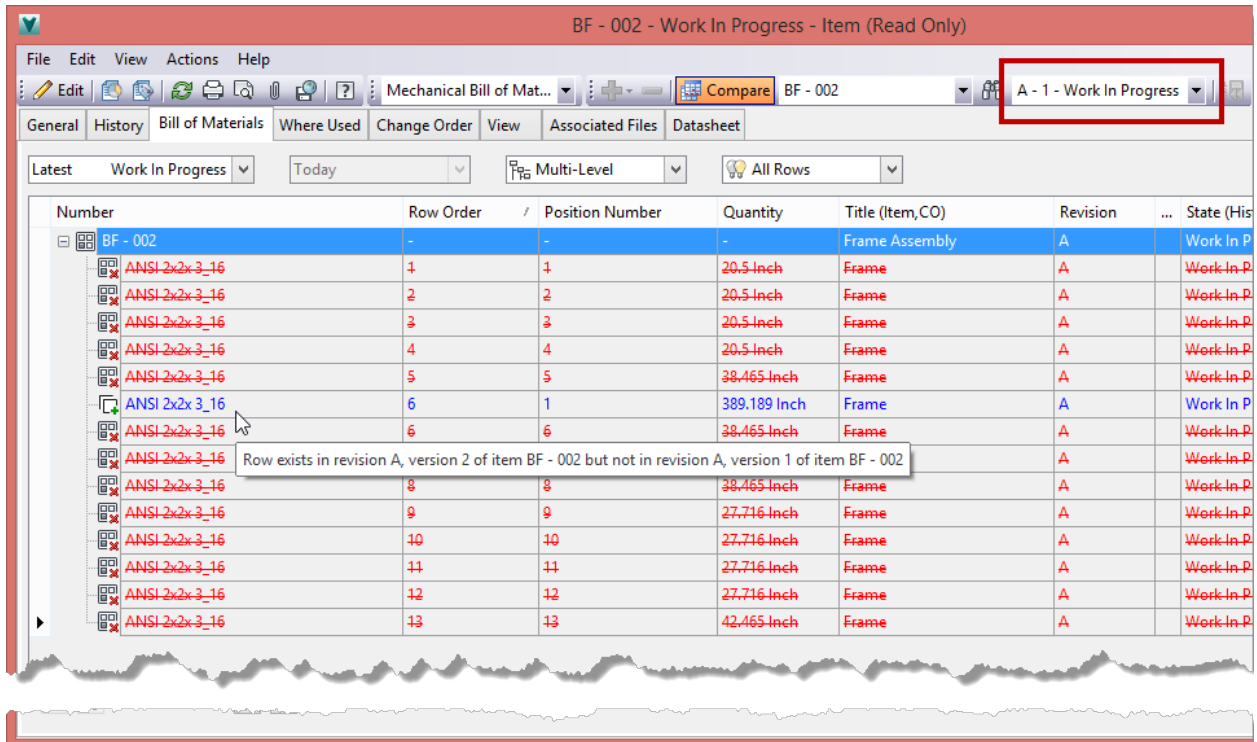
When exporting items using this command, the Export wizard will not show the option, Released and Obsolete items only as shown in the image below.





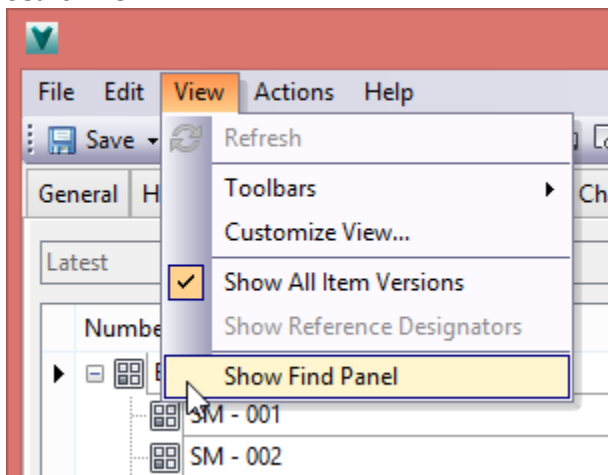
BOM Compare

BOM Compare has been improved to support groups/multiple BOM rows and BOM row UPDs. In addition to that, BOM Compare now supports item versions. It shows the revision followed by version number and then the lifecycle state of the item in the combo box for the item is selected for comparison.



To know more about BOM Compare in general, refer to [Vault Help here](#).

Search BOM



Find Panel can now be used to search inside BOM views, include the Multi-Level view. In flat views (Parts-Only and First-Level), rows that do not match search term will not be shown. While that is true for the most part in Multi-Level views, in order to maintain the structure, nodes may be shown even though they don't match the search text because they have children that match the search text as shown in the image below.

The same Search functionality is enabled in Uses and Where Used tabs as well.

Blower Design - Work In Progress - Item

File Edit View Actions Help

Save Exit Edit Mode Mechanical Bill of Mat... Compare Enter an item nur

General History Bill of Materials Where Used Change Order View

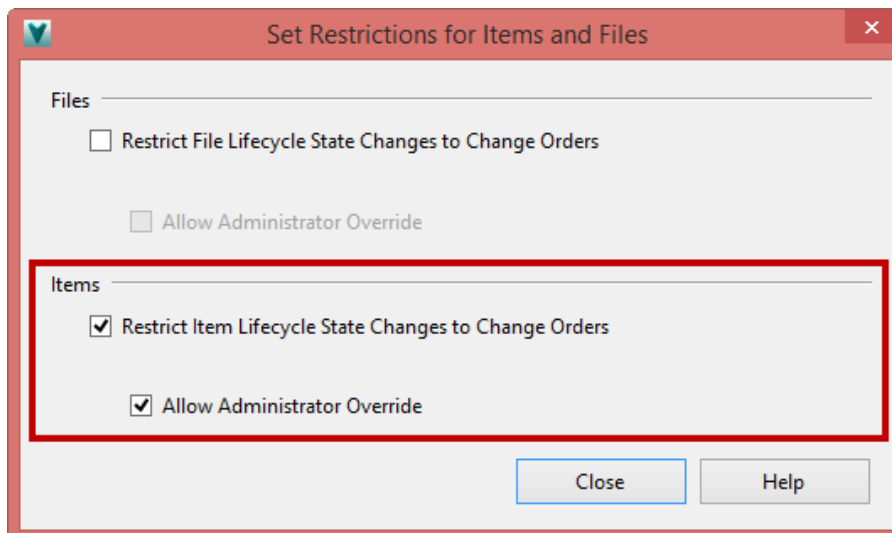
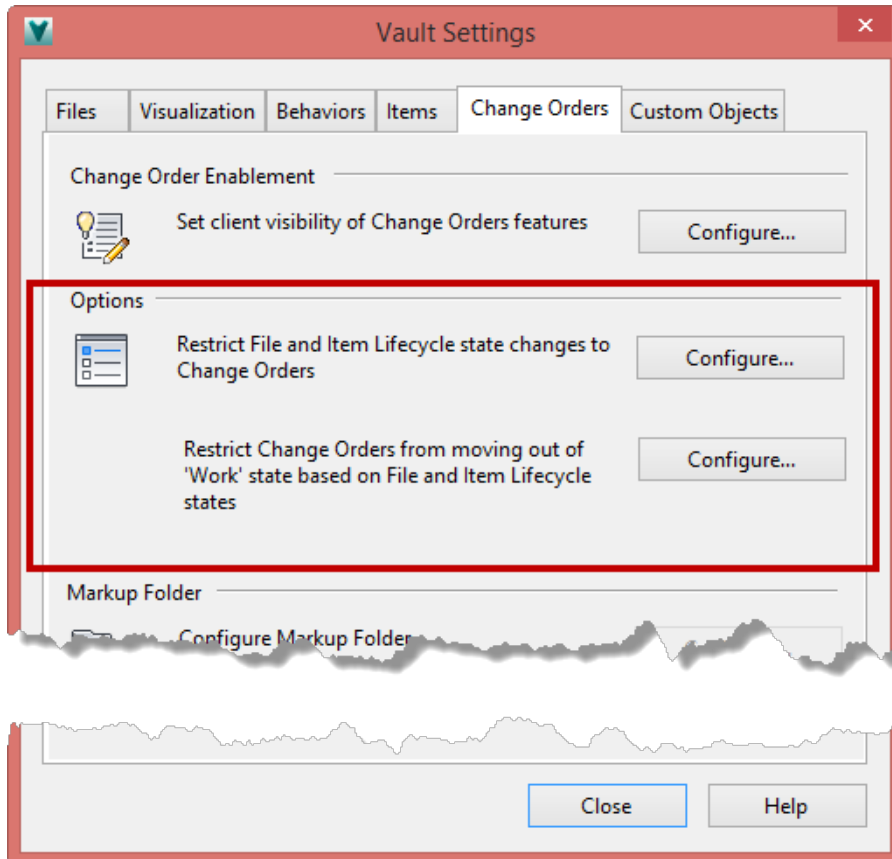
Latest Work In Progress Today Multi-Level All Rows

sh Find Clear

Number	Row Order	Position Number	Quantity	Title (Item,CO)
Blower Design	-	-	-	Blower Assembly
MA- 001	3	3	1 Each	Motor Assembly
Motor Shaft 001	3.0	1	1 Each	Shaft
EX - 1234	5	5	1 Each	Exhaust
ANSI B18.21.1 - 0.25	5.0	1	20 Each	Helical Spring Lock Washers 0
SH - 0001	8	8	1 Each	Fan Shaft
SH - 0001	13	44	1 Each	Fan Shaft
ANSI B18.22.1 - 1/4 - narrow - Type A	14	13	30 Each	Plain Washer (Inch) 1/4 - nar...
ANSI B18.21.1 - 0.25	15	14	30 Each	Helical Spring Lock Washers 0
ANSI B18.22.1 - 1/2 - wide - Type A	22	33	8 Each	Plain Washer (Inch) 1/2 - wi...
ANSI B18.21.1 - 0.5	23	34	8 Each	Helical Spring Lock Washers 0
ANSI B18.22.1 - 3/8 - wide - Type B	26	37	4 Each	Plain Washer (Inch) 3/8 - wi...
ANSI B18.21.1 - 0.375	27	38	4 Each	Helical Spring Lock Washers 0

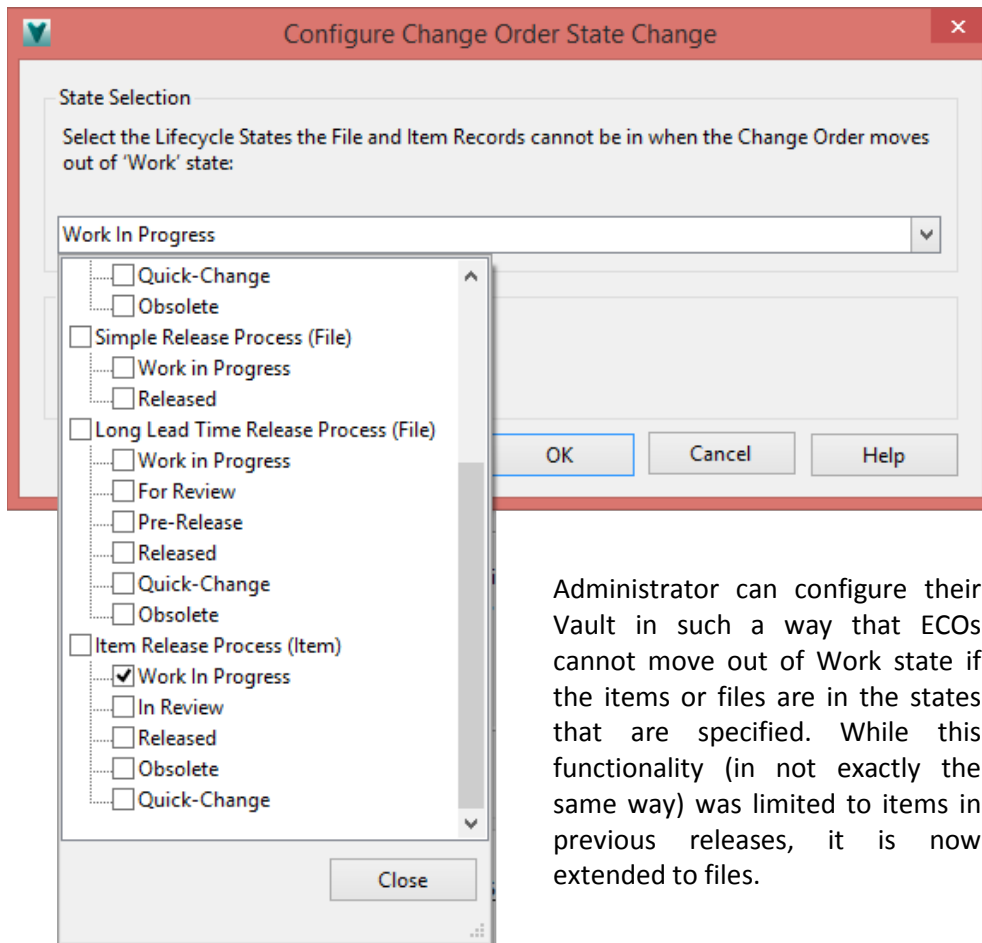
Settings for Change Orders

Legacy settings for item's lifecycle states in the context of change orders have been updated based on the changes to item lifecycles. The restrictions can be accessed from the Change Orders tab on the Vault Settings dialog as shown in the image below.

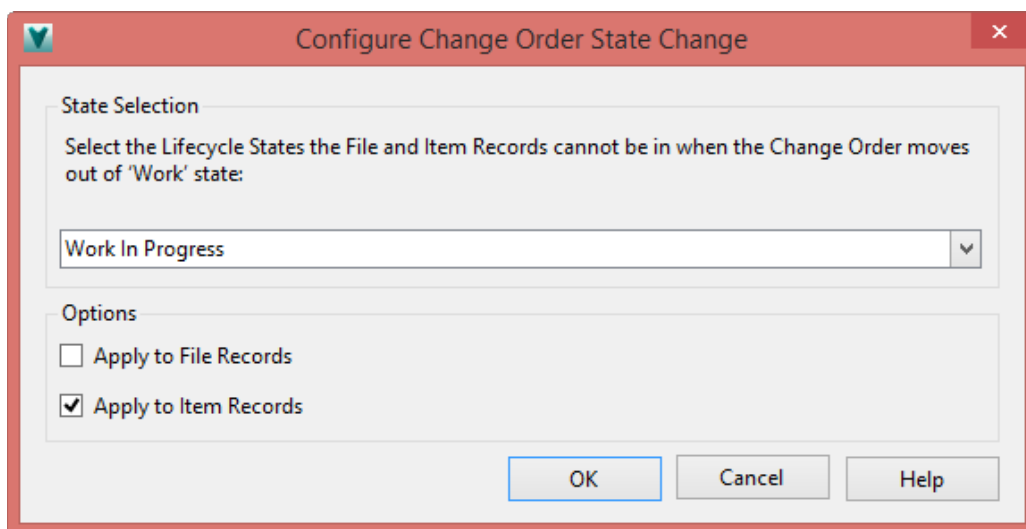


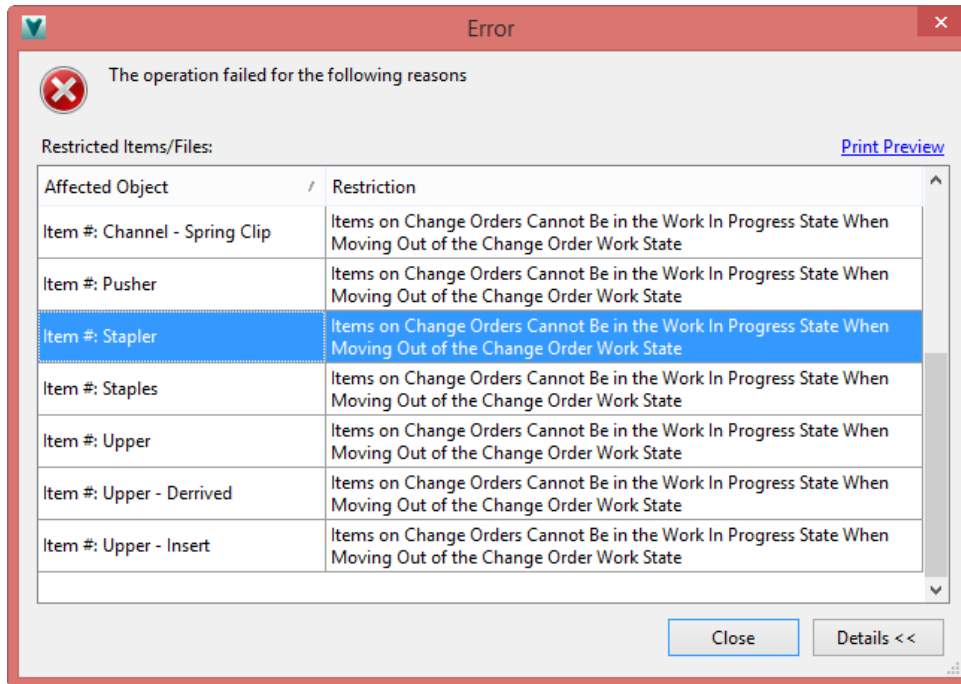
While it is still possible to restrict item's lifecycle state changes to ECOs, it is now possible to restrict file's lifecycle state changes to ECOs as well.

In both cases, Administrator override is allowed as an option. When selected, Administrator can change lifecycle state of items/files outside of ECOs.



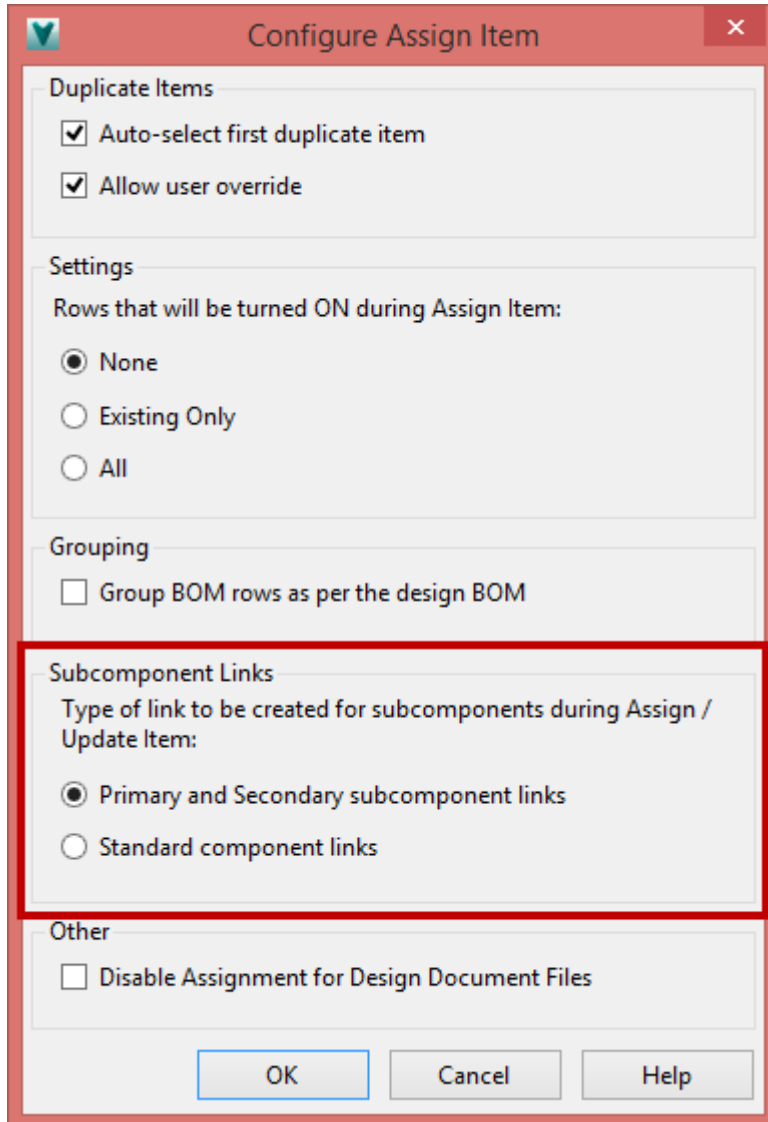
Administrator can configure their Vault in such a way that ECOs cannot move out of Work state if the items or files are in the states that are specified. While this functionality (in not exactly the same way) was limited to items in previous releases, it is now extended to files.





User will be blocked from moving ECO out of Work state based on the specified lifecycles state of items and files.

Subcomponent Links



Configure Assign Item

Duplicate Items

- ☒ Auto-select first duplicate item
- ☒ Allow user override

Settings

Rows that will be turned ON during Assign Item:

- ☒ None
- ☐ Existing Only
- ☐ All

Grouping

- ☐ Group BOM rows as per the design BOM

Subcomponent Links

Type of link to be created for subcomponents during Assign / Update Item:

- ☒ Primary and Secondary subcomponent links
- ☐ Standard component links

Other

- ☐ Disable Assignment for Design Document Files

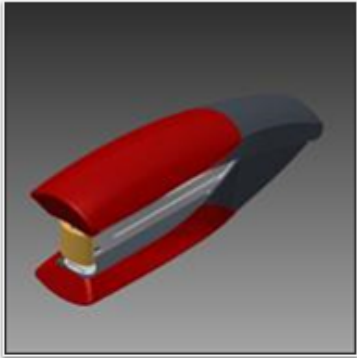
OK Cancel Help

It is now possible to configure Vault in such a way that only Standard Component links are created in place of Subcomponent links. For example, virtual component inside Inventor will be created as Standard Component links instead of Subcomponent Links. To understand the behavior of different link types, refer to Vault Help.

Thin Client



Vault Thin Client has been updated to reflect item and BOM related changes.

On/Off Rows



Title (Item,CO): Stapler
Revision: A
State: Work In Progress
Category Name: Assembly

System

Attachments	
Category Glyph	
Category Glyph (Historical)	
Category Name	Assembly
Category Name (Historical)	Assembly
Change Order State	
Comment	
Controlled By Change Order	
Current Owner	NOV57KYTZ1\AUTODESKVAULT

Number

Bottom

- Bottom - Anvil
- Bottom - Back
- Bottom - Front
- Lower Mount
- Spring

Upper

- Channel**
 - Channel - Bumper
 - Channel - Cover1
 - Channel - Cover2
 - Channel - Hinge Pin
- Pusher
- Staples
- Channel - Spring Clip
- Upper - Derived
- Upper - Insert

File and Item Display Settings

Filters to limit the types of data that are displayed

Items

☒ Released items

History

☒ Latest version

Bill of Materials

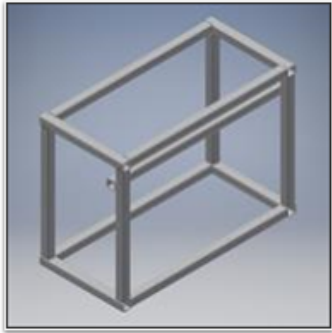
☒ ON rows
 ☐ OFF rows
 ☐ Both rows

While by default only On rows are shown, Administrator can configure the Thin Client to show Off rows as well.



Group Rows

As shown in the following images group rows as well as multiple BOM rows can be seen in the Thin Client.

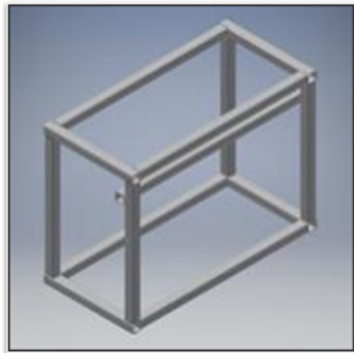


BF - 002

Title (Item,CO): Frame Assembly
Revision: A
State: Work In Progress
Category Name: Assembly

Number ▲	Quantity
ANSI 2x2x 3_16	389.189

1 Total Items, 1 First-Level Items, 1 Unique Items



BF - 002

Title (Item,CO): Frame Assembly
Revision: A
State: Work In Progress
Category Name: Assembly

System

Attachments

Category Glyph

Category Glyph (Historical)

Category Name

Number ▲	Quantity
ANSI 2x2x 3_16	27.716
ANSI 2x2x 3_16	27.716
ANSI 2x2x 3_16	38.465
ANSI 2x2x 3_16	42.465
ANSI 2x2x 3_16	27.716
ANSI 2x2x 3_16	27.716
ANSI 2x2x 3_16	38.465
ANSI 2x2x 3_16	20.5
ANSI 2x2x 3_16	20.5
ANSI 2x2x 3_16	20.5
ANSI 2x2x 3_16	38.465
ANSI 2x2x 3_16	38.465
ANSI 2x2x 3_16	20.5

BOM Properties

BOM Row UDPs that are defined in Vault can be added and shown in the Thin Client just like any other property.

Item Iterations

Although by default only latest version is shown, Administrator can change the setting to allow users to view historical versions inside Thin Client. Once allowed by Administrator from the File and Item Display Settings section of the Settings page, user can toggle between all versions and latest version when viewing an item. While in the **History** view, select the **Toggle all versions** button to toggle between latest and all versions.



Reference Designators

Number	Tag	Location
1329RS-ZA00518VNH	MOT216	FLOOR
1329RS-ZA00518VNH	MOT208	FLOOR
1329RS-ZA00518VNH	MOT212	FLOOR
1771-IAD	PLC702	MCAB5
1771-IAD	PLC602	
1771-IAD	PLC622	
1771-IAD	PLC502	
1771-IAD	PLC722	
211CBL	211CBL	MACHINE
2MR-1405	215CBL	MACHINE
2MR-1405	207CBL	MACHINE

In the Bill of Materials views, there is now a Reference Designator view to see the reference designators for AutoCAD Electrical BOM.

Copy Design

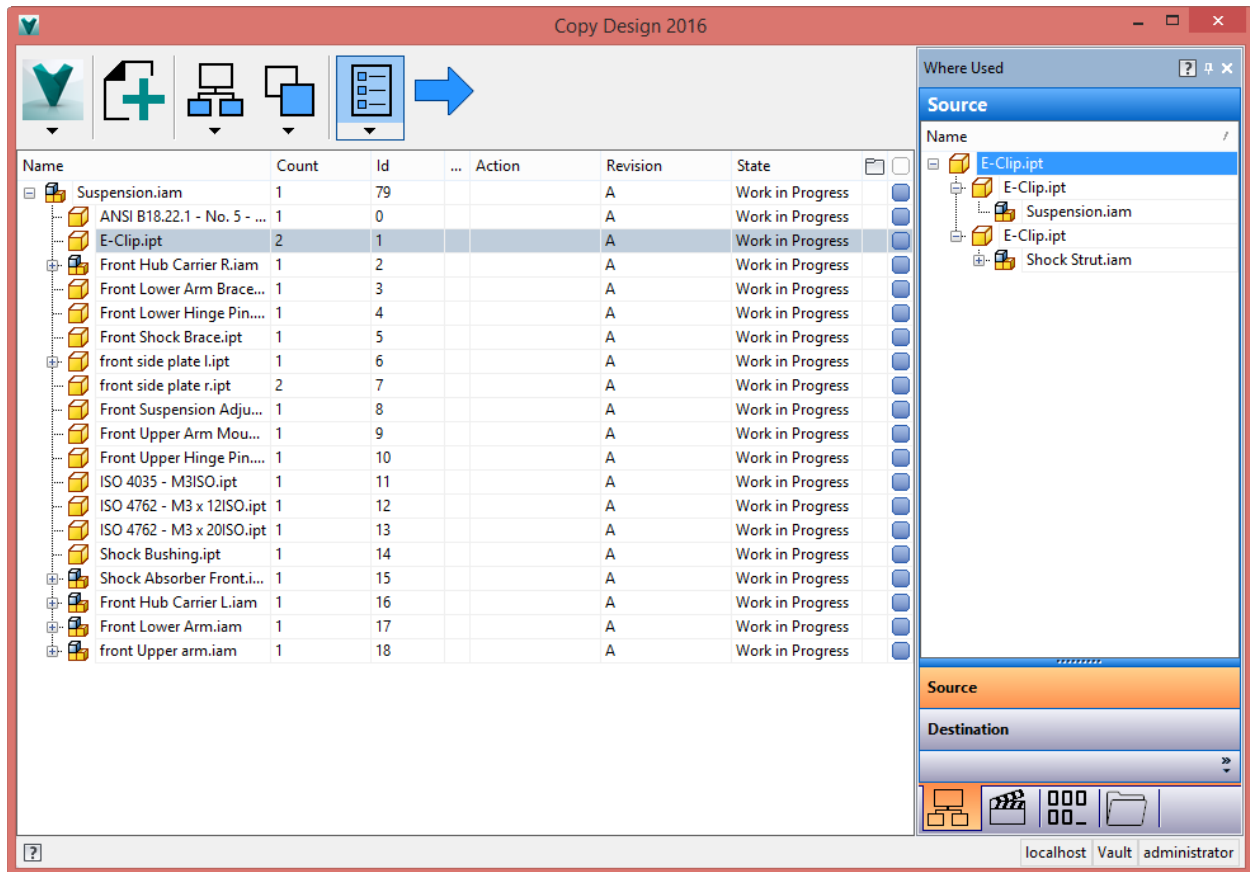
New Interface

Copy Design has been completely overhauled and it's a standalone application now. It can be launched either from inside Vault Explorer by selecting a file and invoking the Copy Design command or as an app without having to go through Vault Explorer.

This new app is available only with Vault Workgroup and Vault Professional.

Reference-based actions

Operations in Copy Design can now be limited to a specific reference instead of applying them to all references of a component. The Count column in the grid indicates how many references of a component exist in the structure and the Where Used panel shows where each reference is used as shown in the image below.

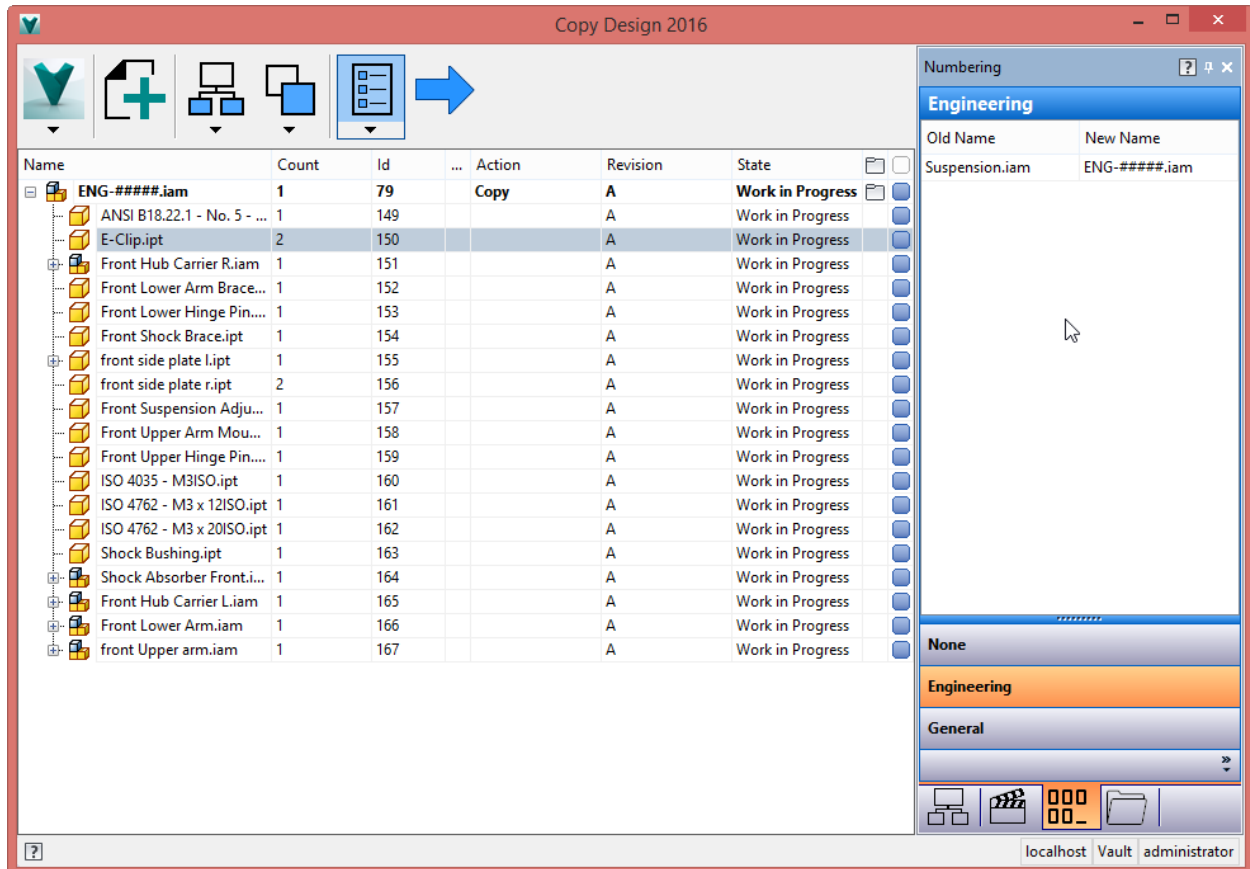


Server-side Copy

In previous versions of Copy Design, files are downloaded to the Client workstation, references are fixed and new files are added to Vault. In this new version of Copy Design, all of the file activity is done on the Server. References are fixed when the new files are opened in the CAD application.

Numbering schemes

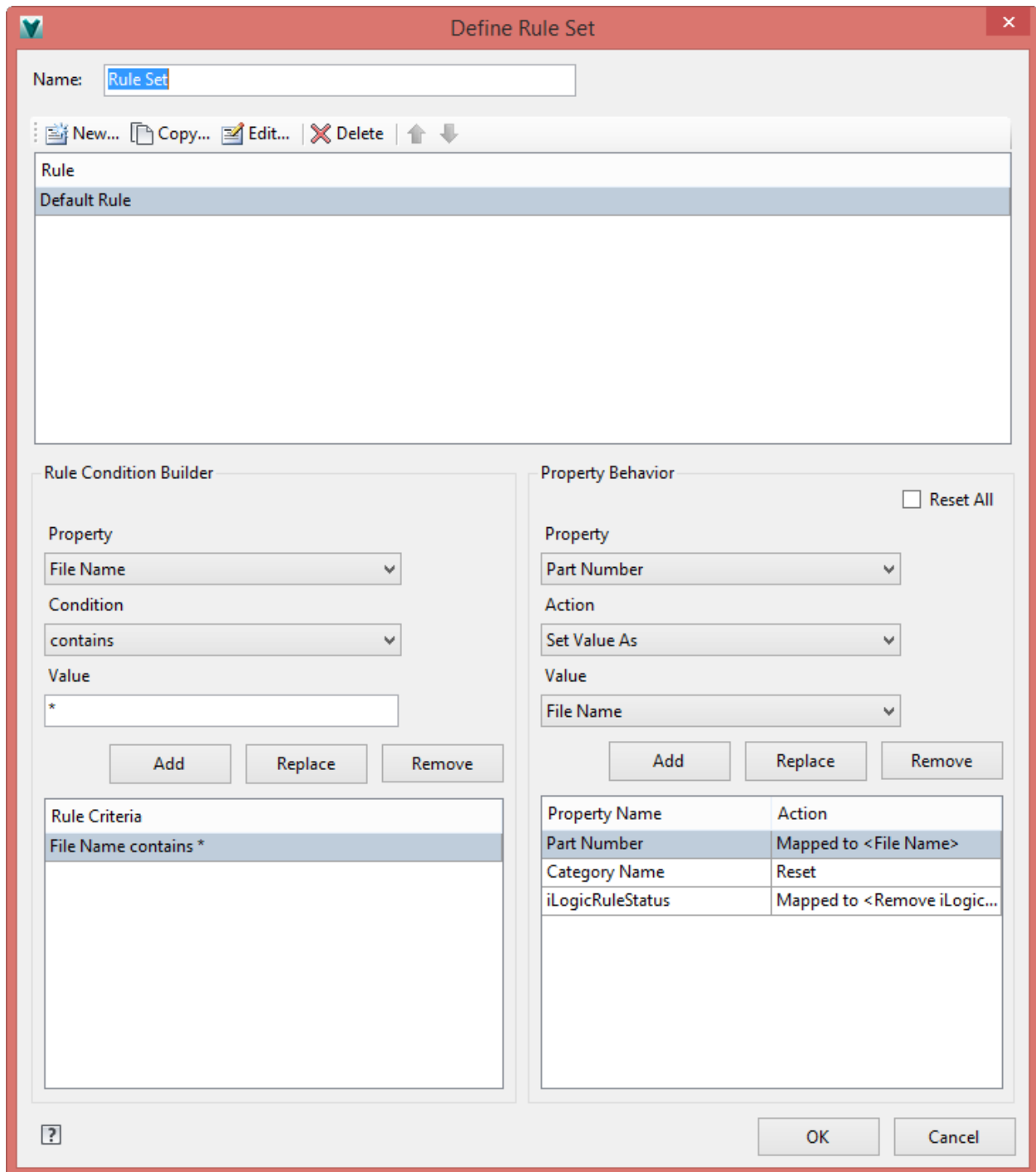
Numbering schemes defined in Vault can be used for naming files that are created in Copy Design. Administrator can enable the numbering schemes that can be shown in Copy Design. And the schemes are the enabled will be shown in the Numbering panel as shown below.



Properties

Administrator can set rules so that properties for the new files can have certain behavior based on certain criteria. The following rule definition dialog allows the administrator to define behavior for properties. Once rules are defined and saved, they will be available under the toggle for Rule Set on the main interface.

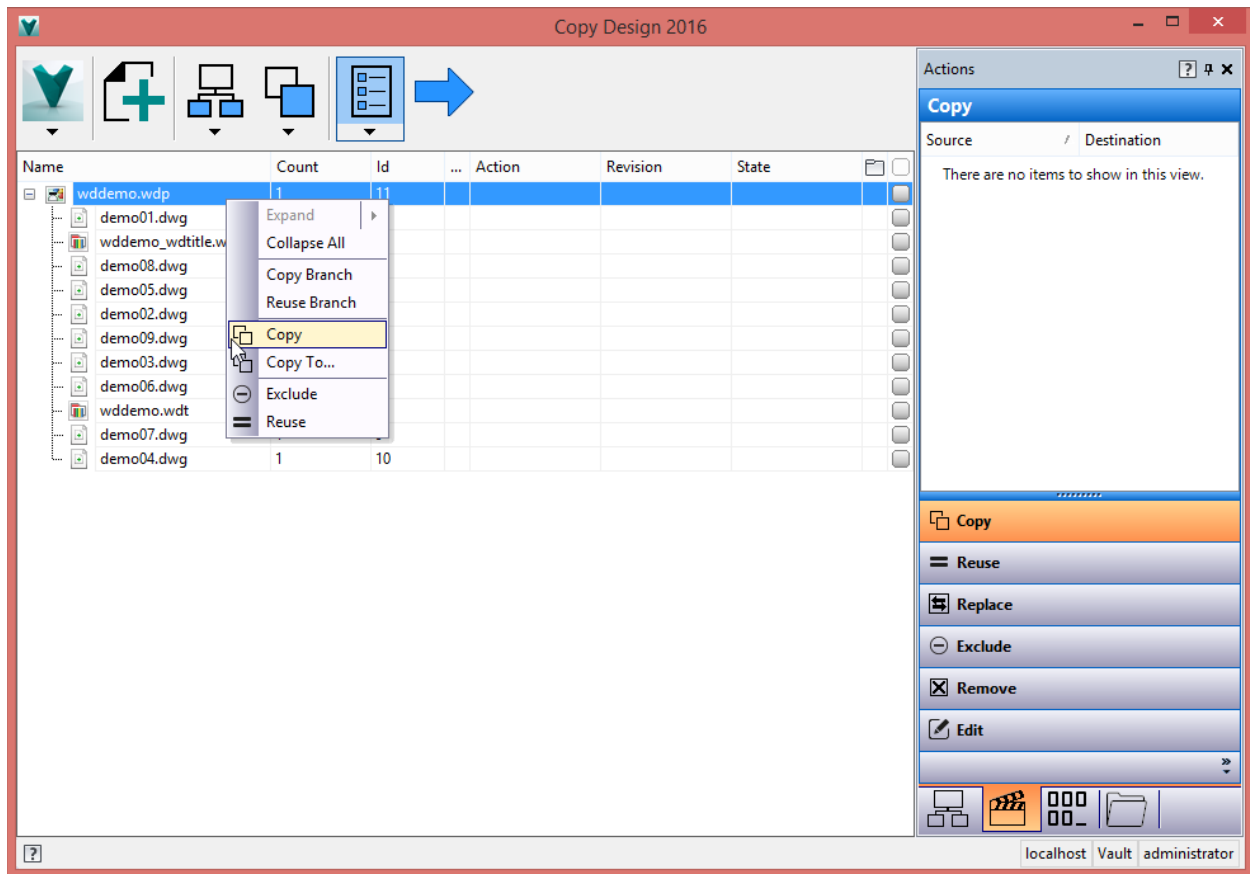




ACADE support

AutoCAD Electrical projects, like the one shown in the image below can now be copied using the new Copy Design tool.





In addition to Copy Design support for ACADE files, it is now possible to **Move and Rename** ACADE files.

Old Copy Design

If for some reason there is a need to use the old Copy Design tool, you can change the following configuration switch to True:

<Property Name="Use Old Copy Design" Value="False" />

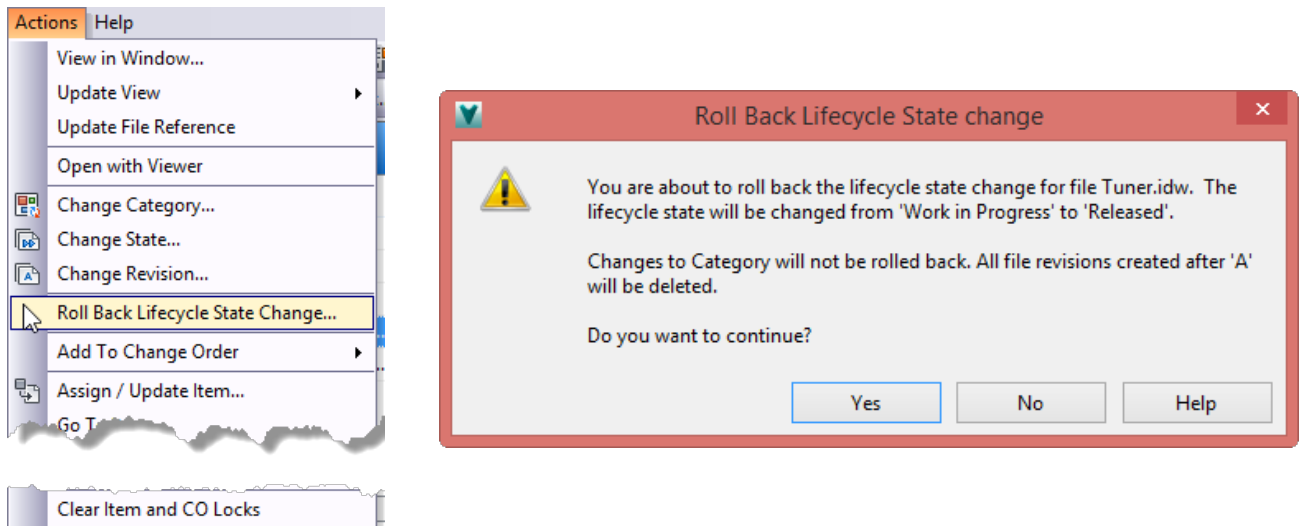
It can be found inside: %appdata%\Autodesk\Autodesk Vault Professional 2016\ApplicationPreferences.xml

If you cannot find the switch, start and close the new Copy Design tool once and try again. And note that this switch is applicable to the Copy Design command inside Vault Explorer. You can always launch the new Copy Design as a separate app outside of Vault Explorer.

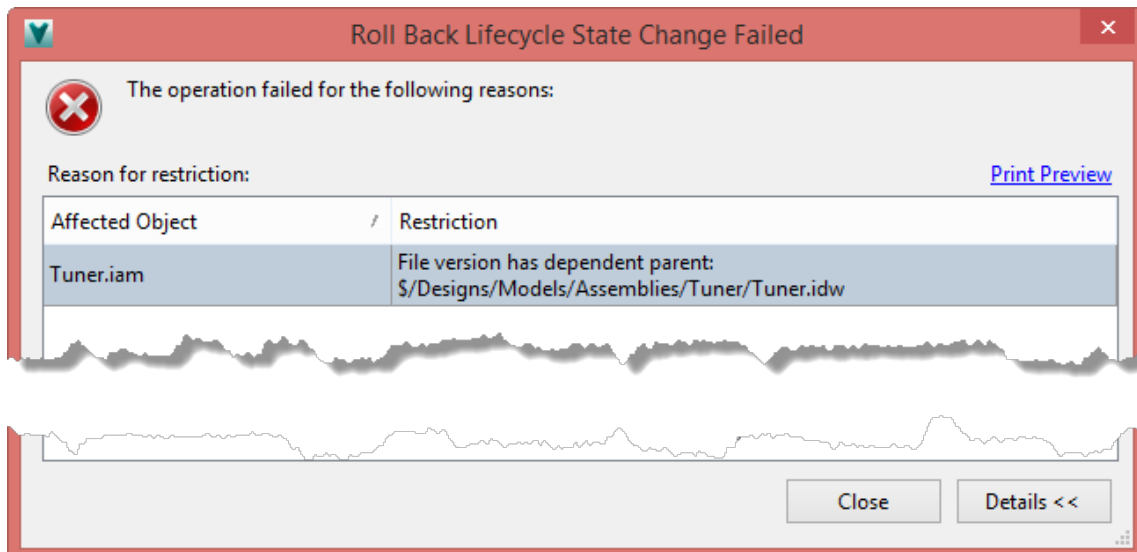
For additional help on the new Copy Design app, please refer to [Copy Design Help](#) online.

Rollback LC state change for files

It is now possible to rollback lifecycle state changes on files. Select a file that you would like to perform a rollback on and select the command, Rollback Lifecycle State Change from the Actions menu. As long as there are no restrictions, there will be a warning message informing the user of the consequences of the operation. Upon selecting Yes the file versions between the latest (including the latest) and the target version will be purged and the target version will become the latest version of the file.



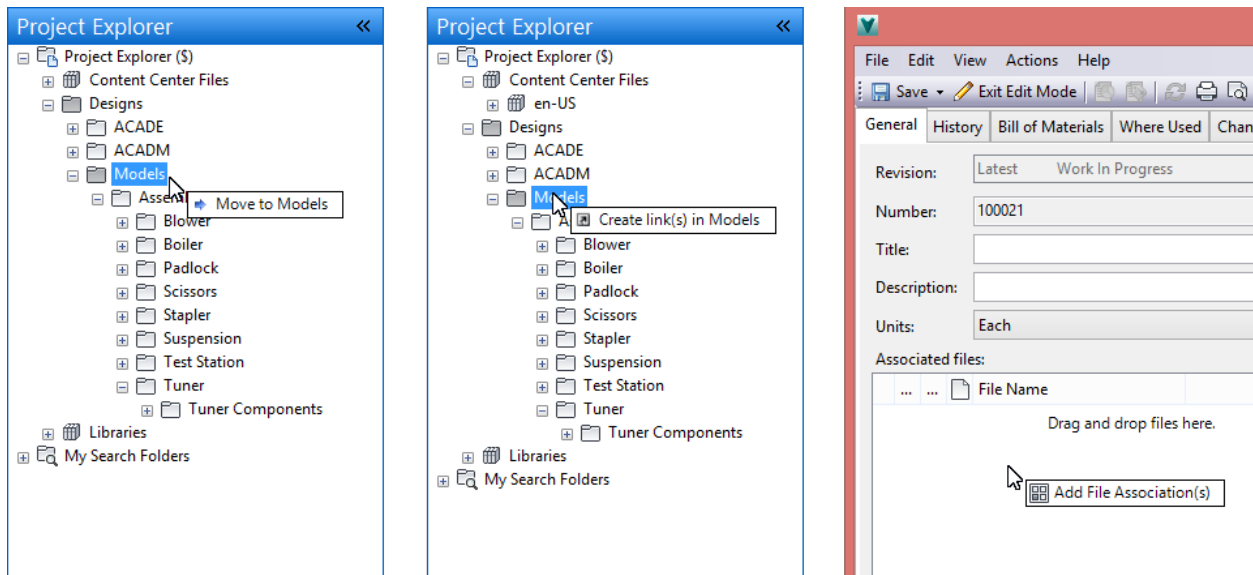
Rollback operation relies on Lifecycle rules as well as file relationships. For example, if there is no file version that cannot be purged in the previous state, rollback will fail. And if there is a parent file that is using the selected file, rollback will fail (see the image below). In order to overcome this, start rollback from the parent.



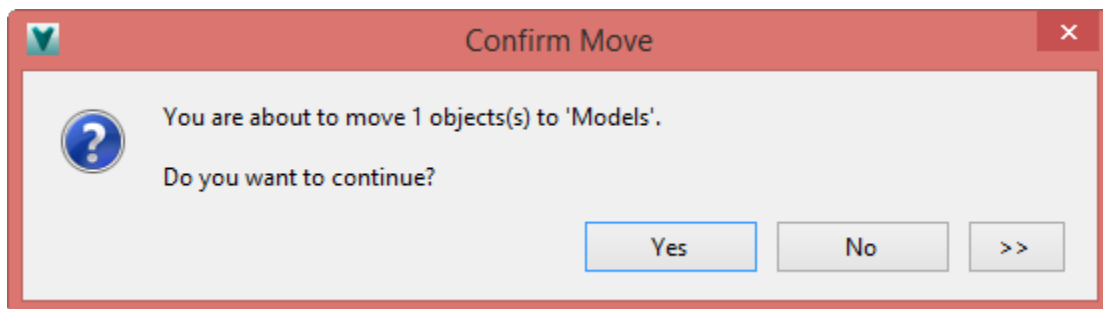
Note: Rollback operates on one file at a time.

Move and Drag & Drop behavior

While moving entities within Vault Explorer user will now see a tooltip along the cursor indicating the result of the operation as shown in the images below.



In addition to that, in cases where the operation results in a **move**, user will be presented with the prompt (as shown below) to confirm the operation. This prompt is turned off by default and it can be turned on easily by accessing the Prompt Manager.



Inventor Integration

AnyCAD

Inventor now supports having references to files of any CAD. And when such files are added to Vault, relationships are shown in Uses and Where Used tabs in Vault Explorer. And operations such as Open from Vault, Move & Rename, etc. that deal with file relationships support Inventor files with references to any CAD file.

AutoCAD Drawing Underlay

When Inventor part files with DWG Underlays are added to Vault, relationships are shown in Uses and Where Used tabs in Vault Explorer and all file operations inside Vault maintain these relationships.

ACADE Support

Move & Rename

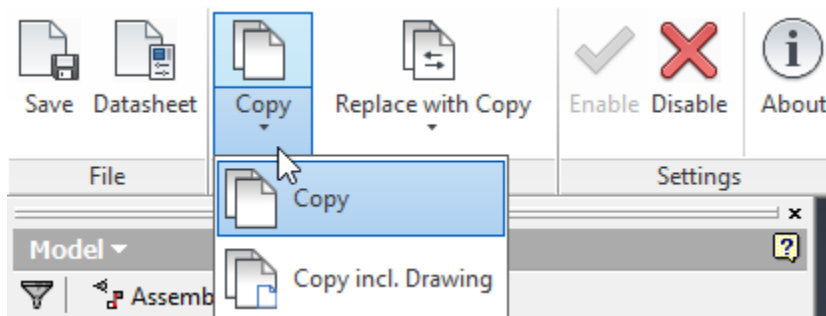
AutoCAD Electrical files can now be moved and renamed inside Vault and the relationships will be maintained after Move and Rename.

Data Standard

New commands are available on the Data Standard tab in the ribbon in Inventor.

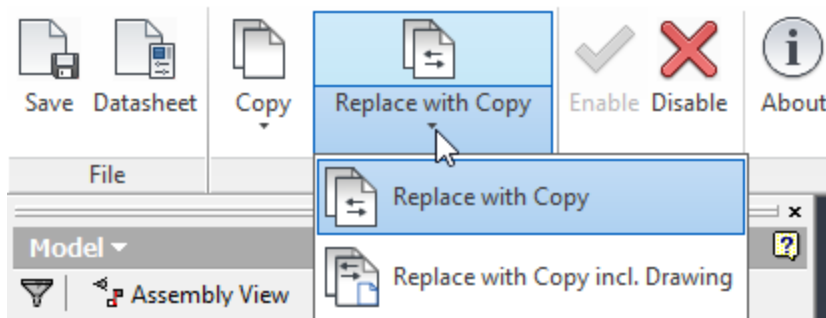
Copy incl. Drawing

This new command copies the open component (part or assembly) along with its drawing.



Replace with Copy and Replace with Copy incl. Drawing

While Replace with Copy allows you to replace a component with a copy, Replace with Copy including Drawing allows you to replace a component and its drawing with copies.



Category properties on new file dialogs

Properties associated with categories can be seen on the New File dialogs (as shown in the image below) so that user can fill them during file creation. Once the file is added to Vault these properties can still be seen directly on the datasheet for the file.

The 'New File' dialog box is shown with the following fields and sections:

- Category:** Engineering (dropdown)
- Document Type:** Inventor Part (dropdown)
- Template:** Add template folders and files first
- Number Scheme:** Engineering (dropdown)
- Number:** ENG - #####
- Title:** *
- Description:**
- Path:** \$/Designs
- File Name:** * Will be generated
- Category Properties:**

Property Name	Property Value
Author	
Manager	
Engr Approved By	
Engineer	
Designer	
Stock Number	
Part Number	
Material	
Description	
Cost	
Checked By	
Company	
Title	
Subject	
Keywords	

Buttons: OK, Cancel

For additional information on Data Standard, refer to [Vault Help here](#).