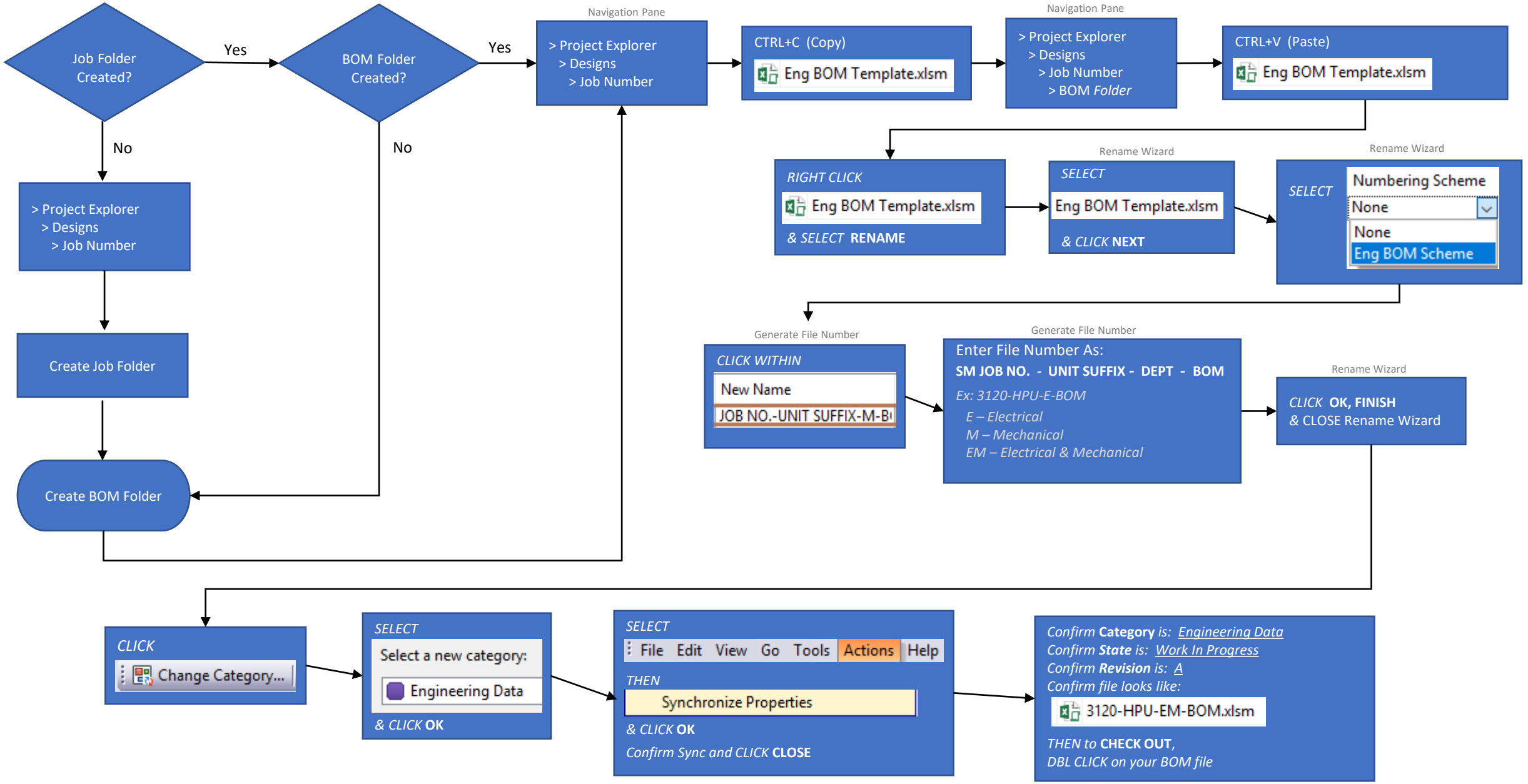
Vault BOM Creation Workflow



STELLA MARIS	PROJECT NAME	PROJECT NO.	PAGE(s)
	DOCUMENT TITLE BILL OF MATERIALS	GENERATED BY	DATE
	SM DOCUMENT NO. Eng BOM Template [REVISION : 1]	APPROVED BY	DATE

P = Preliminary
A = Approved
O = Ordered
R = Review
- = Empty Row

+ Row

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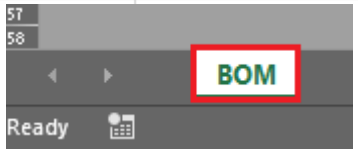
ITEM	QTY	PROJECT TAG	DESCRIPTION	MANUFACTURER	MFG PART NO.	SM PART NO.	STATUS	NOTE
							-	

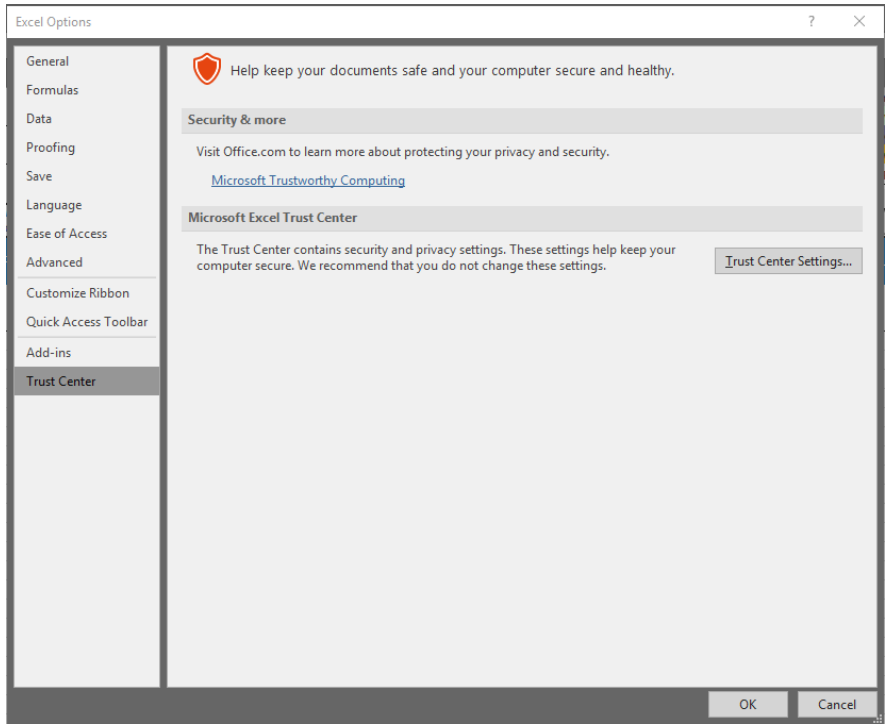


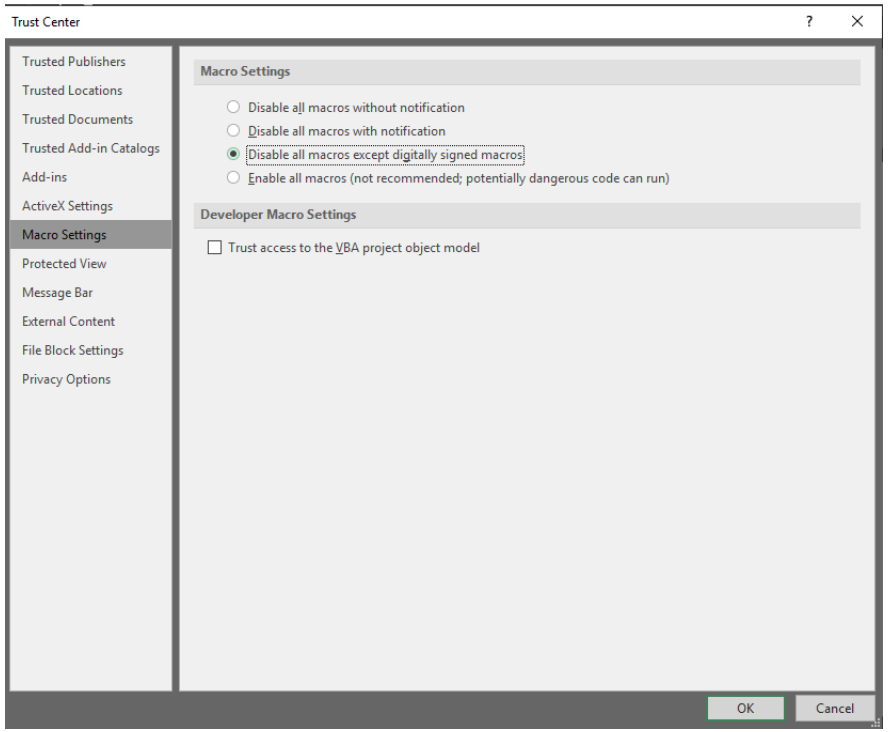
Not Allowed:

- Changing the individual Cell Titles, ex “Project Name” in title block
- SM DOCUMENT NO. in Title Block – This is an auto populated field that comes from Vault. Whatever you name it in Vault will be shown here. Cannot Edit
- Changing Column Names
- Adding Rows without using the “+Row” button at top right (you can still format and resize, but this keeps users from adding a row outside of the table)
- Deleting Columns
    - ITEM, QTY, PROJECT TAG, DESCRIPTION, MANUFACTURER, MFG PART NO. and SM PART NO. are CRITICAL to making this thing work. If Calvin, Ryan, and Clay agree…..When we do not want to show a customer SM PART NO. or MFG PART NO. etc, just click on the header and make the color the same as the background and leave the corresponding rows below blank. I cant give you guys a Title Block if we do not have at least 7 Columns that maintain a relatively consistent size.
- Leaving Status Column Blank. As you use the “+Row” button, each corresponding field will be set to status “Preliminary” by default. If you need to add a break in between data on BOM and create a sub title, you are free to do so. AS LONG AS the status field contains “-” for blank.
- Adding new worksheets to Workbook
- Renaming worksheet from “BOM” A lot of my VBA code rides on using tab name “BOM”
- There is no longer a need to Protect the workbook, it is protected by default now. Any structural changes, column name changes, additions or deletions will need password. I will have password and Ryan Leblanc will have password.

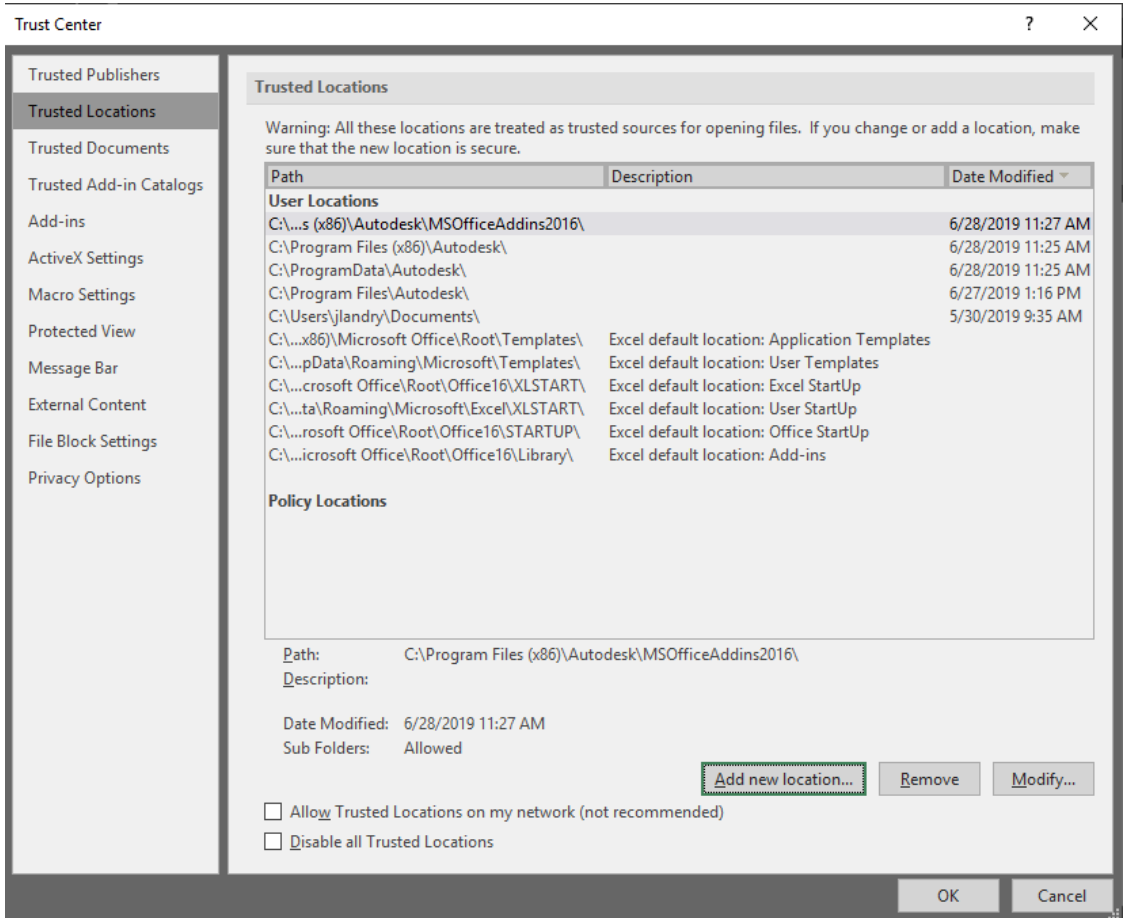
Set Trust Center for Excel Macro Workbook

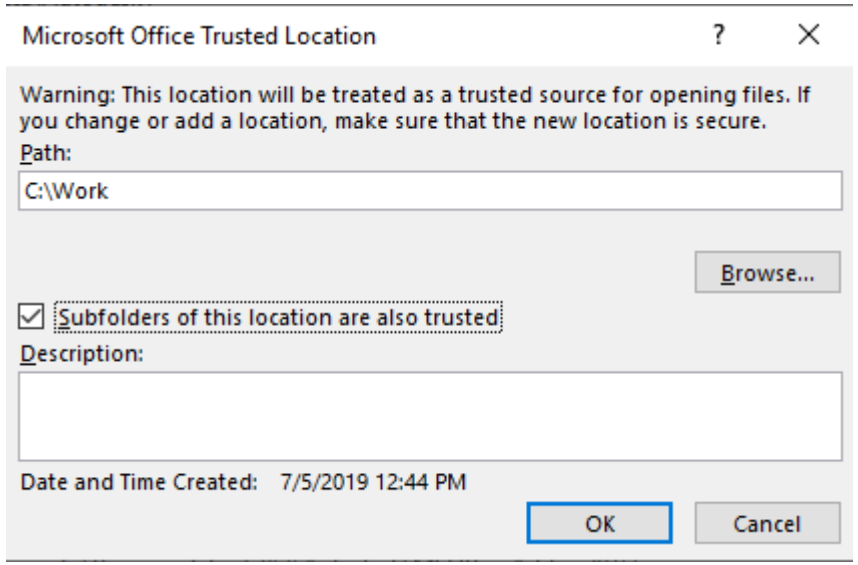
1. From Vault Check out and Open BOM Workbook
2. Go to File -> Options
3. Go to Trust Center
4. Click “Trust Center Settings”
5. In Trust Center Settings window select “Macro Settings” from left column
6. Click “Disable all macros except digitally signed macros”
7. In same Trust Center Settings window select “Trusted Locations” from left column
8. Select “Add Location”
9. Browse for “C:\Work” (This is your Vault Working Folder, if it is not set to this already please let me know)
10. Select “Subfolders of this location are also trusted
11. Save Settings and Exit



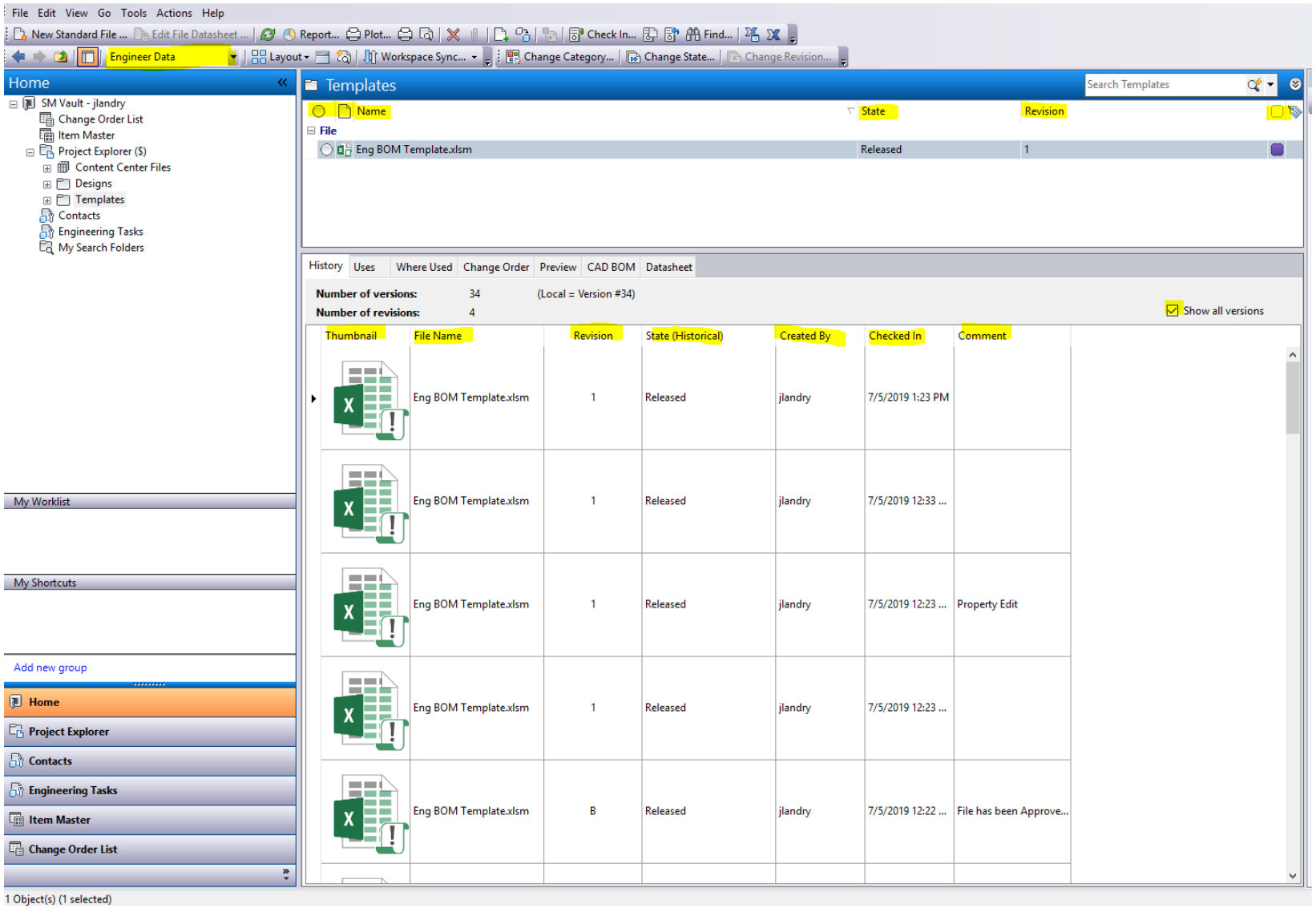


Set Trust Center for Excel Macro Workbook cont…

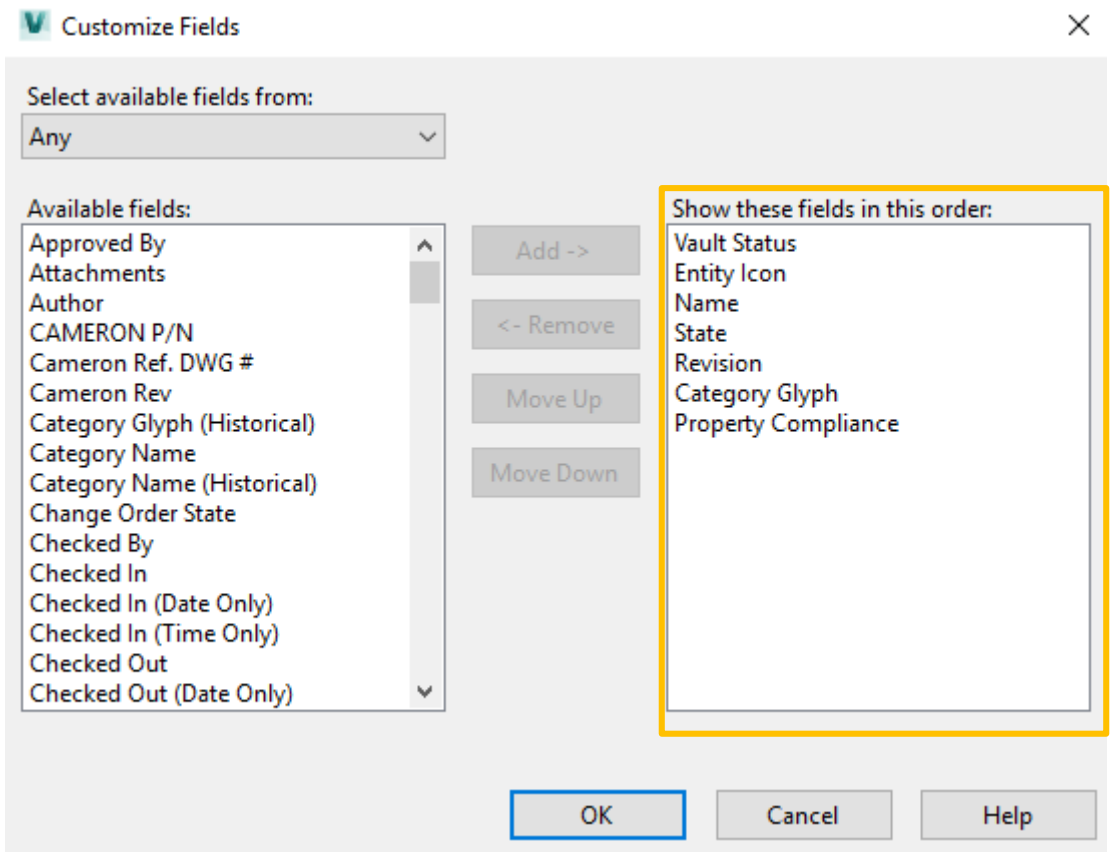


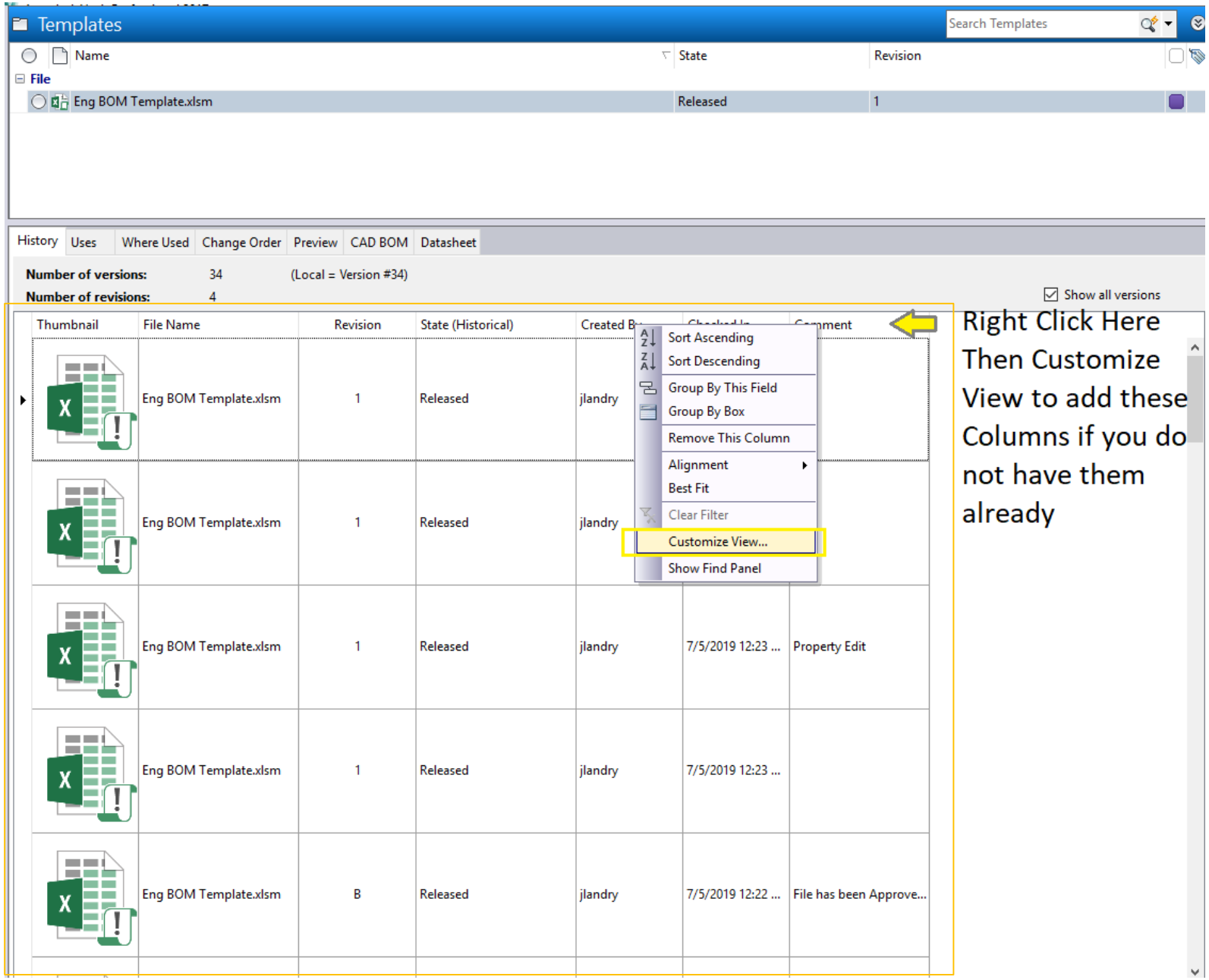


To see properties relevant to BOM, you will need a custom view similar to the following:



To see properties relevant to BOM, modify your custom View Settings in Vault to include the following:




Templates
Search Templates
Name
State
Revision
File
Eng BOM Template.xlsm
Released
1
History
Uses
Where Used
Change Order
Preview
CAD BOM
Datasheet
Number of versions: 34 (Local = Version #34)
Number of revisions: 4
Show all versions
Thumbnail
File Name
Revision
State (Historical)
Created By
Comment
Eng BOM Template.xlsm 1 Released jlandry
Eng BOM Template.xlsm 1 Released jlandry
Eng BOM Template.xlsm 1 Released jlandry 7/5/2019 12:23 ... Property Edit
Eng BOM Template.xlsm 1 Released jlandry 7/5/2019 12:23 ...
Eng BOM Template.xlsm B Released jlandry 7/5/2019 12:22 ... File has been Approve...
Sort Ascending
Sort Descending
Group By This Field
Group By Box
Remove This Column
Alignment
Best Fit
Clear Filter
Customize View...
Show Find Panel
Right Click Here Then Customize View to add these Columns if you do not have them already