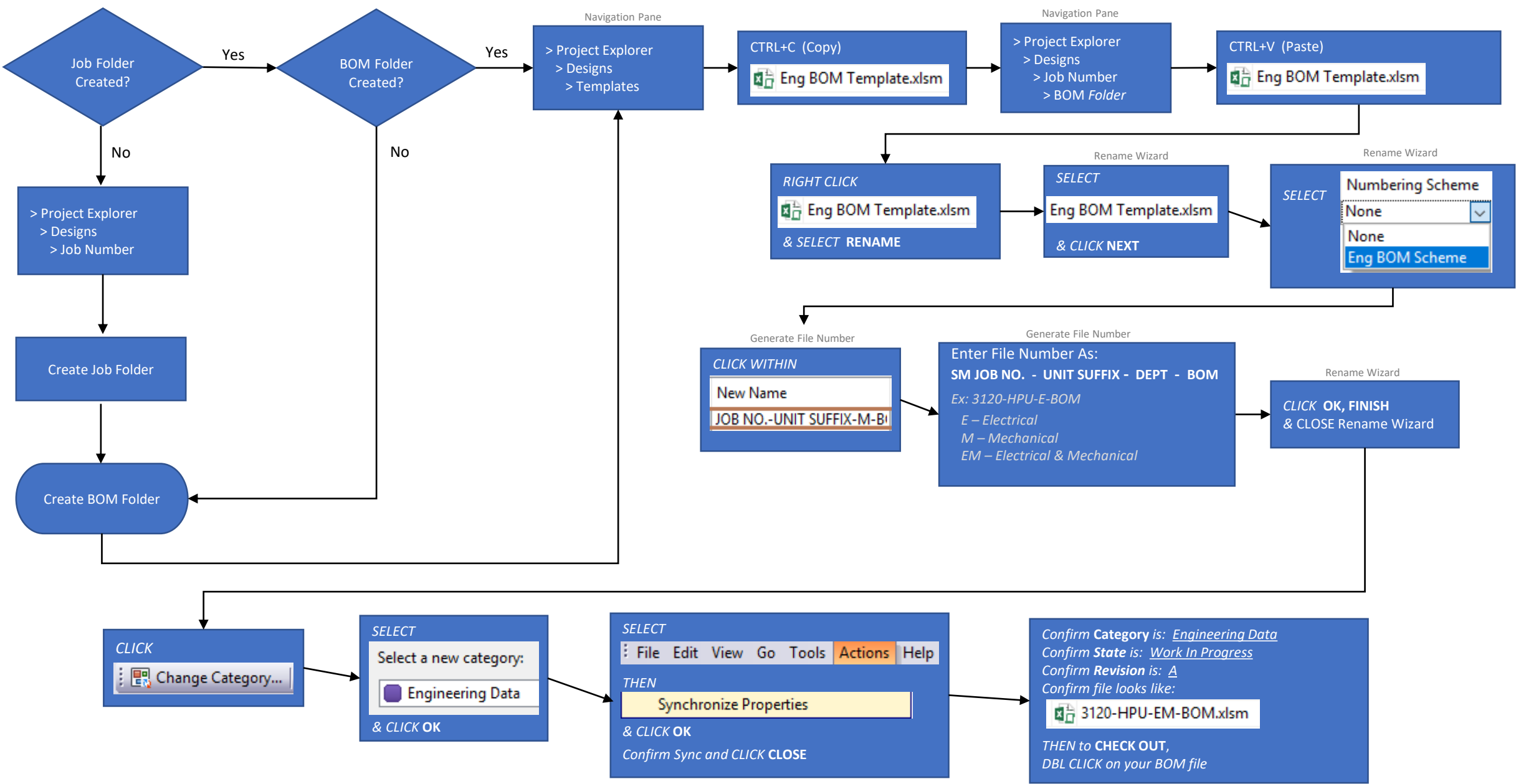

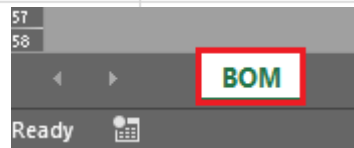


# Vault BOM Creation Workflow



	A	B	C	D	E	F	G	H	I	
1				PROJECT NAME	PROJECT NO.		PAGE(s)	<div>P = Preliminary</div> <div>A = Approved</div> <div>O = Ordered</div> <div>R = Review</div> <div>- = Empty Row</div>		
2										
3				DOCUMENT TITLE	GENERATED BY		DATE			
4				BILL OF MATERIALS						
5				SM DOCUMENT NO.			APPROVED BY		DATE	
6				Eng BOM Template [REVISION : 1]				+ Row		
7	This document contains Confidential and Proprietary information which is the property of Stella Maris LLC (STELLA MARIS) & its affiliates. None of the information contained herein may be communicated, disclosed, or copied without the expressed prior written consent from STELLA MARIS. Reproduction of this document or unauthorized use of patented or patentable features disclosed herein is strictly prohibited.									
8	ITEM	QTY	PROJECT TAG	DESCRIPTION	MANUFACTURER	MFG PART NO.	SM PART NO.	STATUS	NOTE	
9								-		
10										
11										
12										

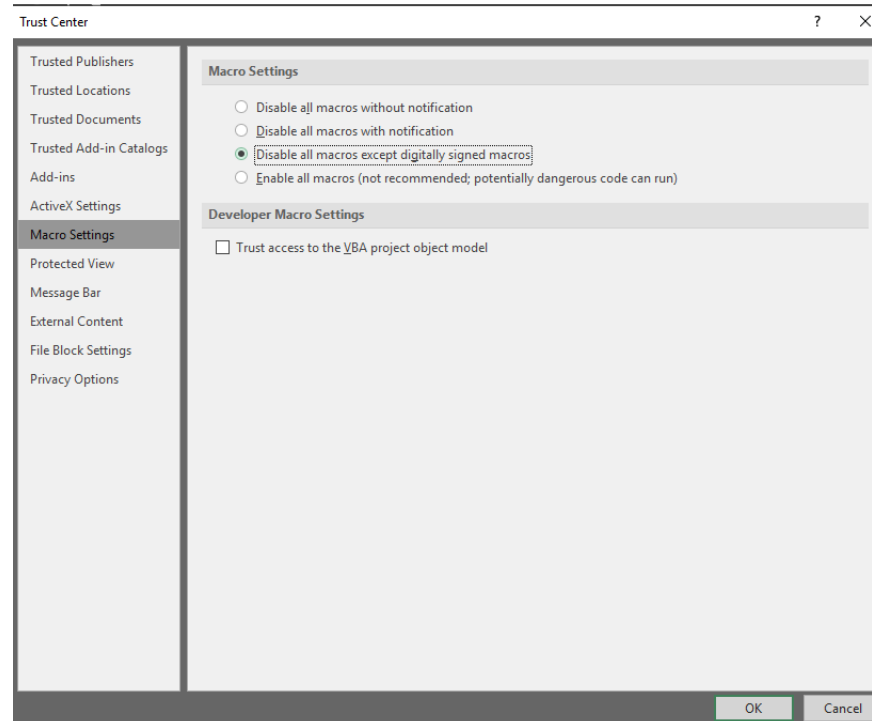
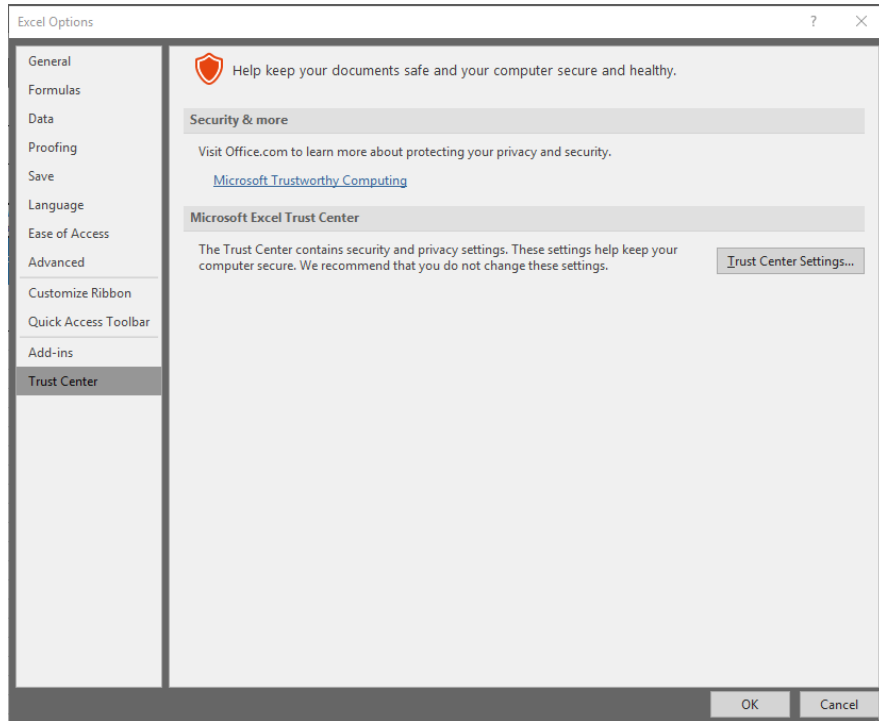


#### Not Allowed:

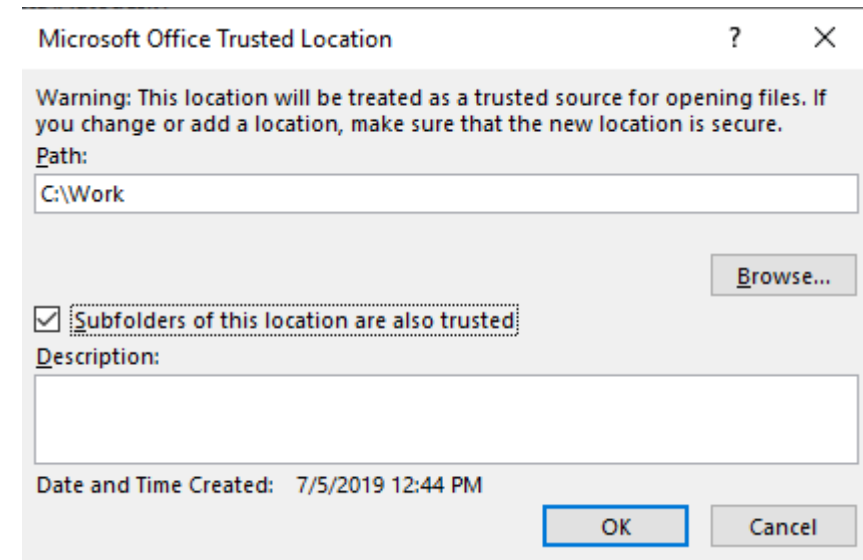
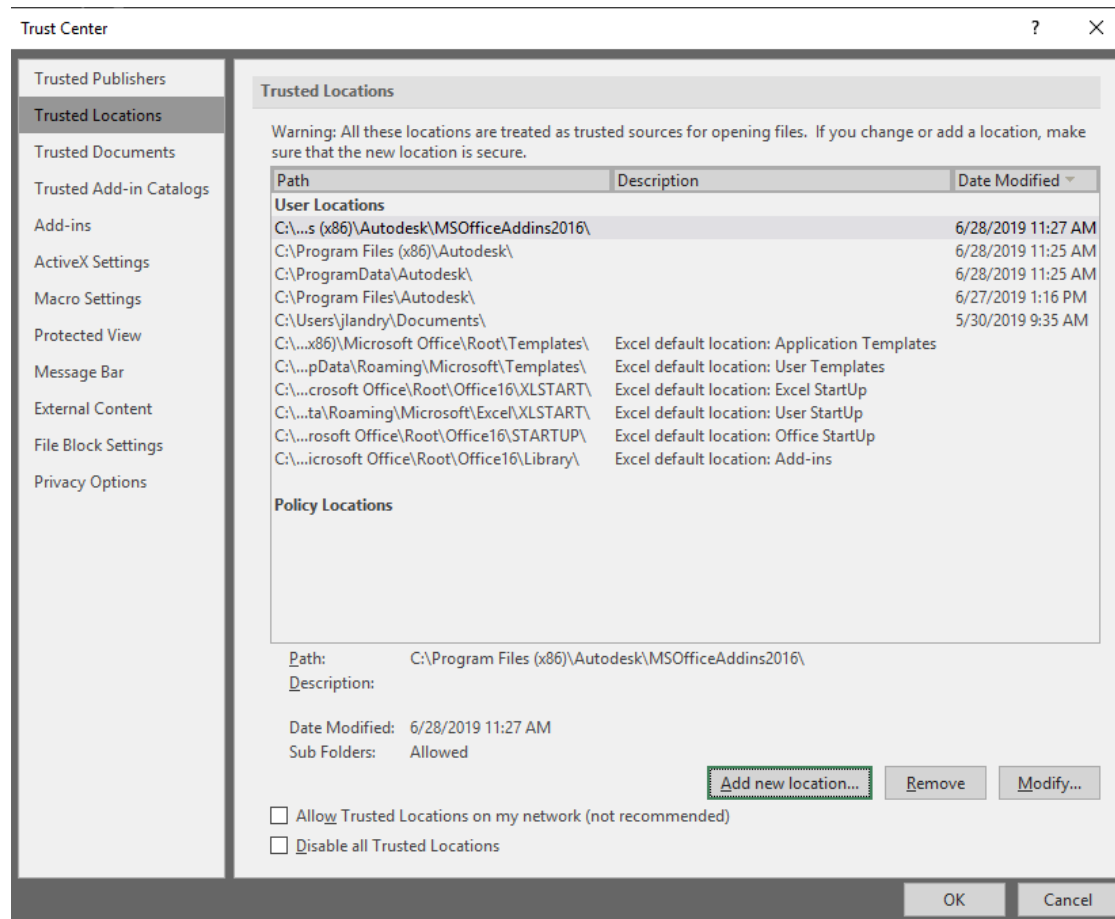
- Changing the individual Cell Titles, ex “Project Name” in title block
- SM DOCUMENT NO. in Title Block – This is an auto populated field that comes from Vault. Whatever you name it in Vault will be shown here. Cannot Edit
- Changing Column Names
- Adding Rows without using the “+Row” button at top 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:

The screenshot displays a software application window with a menu bar (File, Edit, View, Go, Tools, Actions, Help) and a toolbar. The left sidebar contains a tree view with the following structure:

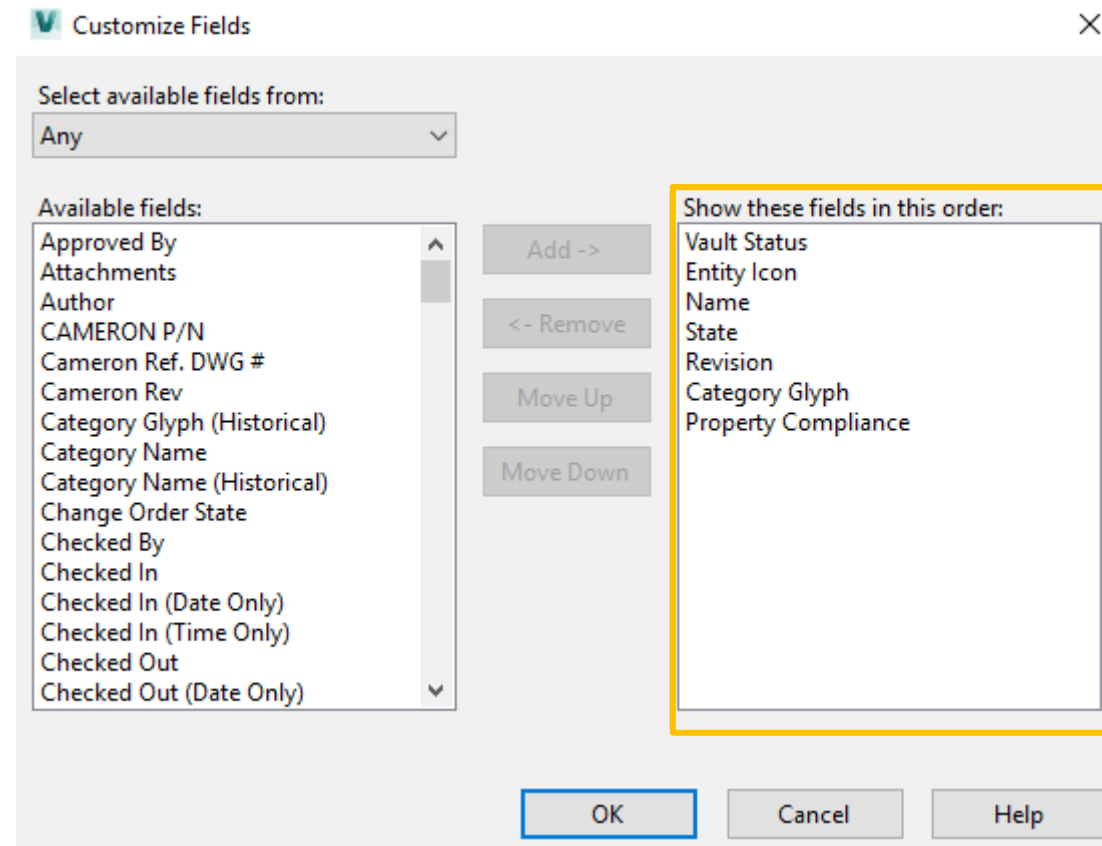
- SM Vault - jlandry
  - Change Order List
  - Item Master
  - Project Explorer (S)
    - Content Center Files
    - Designs
    - Templates
    - Contacts
    - Engineering Tasks
    - My Search Folders

The main pane is titled "Templates" and shows a table of file versions. The table has columns: Thumbnail, File Name, Revision, State (Historical), Created By, Checked In, and Comment. The data is as follows:

Thumbnail	File Name	Revision	State (Historical)	Created By	Checked In	Comment
	Eng BOM Template.xlsm	1	Released	jlandry	7/5/2019 1:23 PM	
	Eng BOM Template.xlsm	1	Released	jlandry	7/5/2019 12:33 ...	
	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...

At the bottom of the window, it says "1 Object(s) (1 selected)".

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	Checked In	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