

# System Log-In Instructions Vault Refresher PDMLink Refresher

Brian Rusthoven Updated - January 2013





## System Log-In Instructions

- Vault
- PDMLink



#### Vault Login Instructions

- 1. Start the "Vault" client side software.
- 2. At the log in screen first select "Windows Authentication" in the top pull down.
- 3. Second type "Vault13" for server name



#### Vault Login Instructions

3. Next, select the "..." button.

- a. This validates the connection to the server and lists the available databases.
- 4. Finally, select "ANL\_VAULT" as the database.

Hit "OK" to exit the screens and the file vault will appear.

| 4   | Log In<br>Autode  | s <b>k</b> * Vault  | × |
|---|---|---|---|
| Databases Please select a database from the list below: ANL_VAULT Vauit OK Cancel | Authentication:<br>User Name:<br>Password:<br>Server:<br>Vault: | Windows Account       Vault Account       Windows Account       •••••       Vault13       ANL_VAULT       Automatically log in next session       OK     Cancel |   |



# System Log-In Instructions - Vault

- PDMLink



#### PDMLink Login

- The following URL will access the SERVER side Workspaces and Common Space. This will only show the UPLOADED parts from your local workspace.
- https://windchill-vm.aps.anl.gov/Windchill

Your login is based on the LDAP user name and password.

The following slides will help clarify the new nomenclature.

#### **PDMLink - Workspace Overview**

- Transitions between Client Side Workspace Folders and the Server Side Workspace are shown.
- The Server Side Workspace is a different entity from the Windchill Database because even though the Server Side Workspace is saved on the server, it is not officially a shared document in Windchill until the file is checked into Windchill
- In ProE, user can use the Upload or Save & Upload option to move the content to the Server Side Workspace directly.
- In ProE, the user can **Check In** the item and move the item directly into the Windchill Database
- On the Check out side, both tools can download the file into the workspace or check out the items directly into the tools session memory
- Remember, if the file is for reference only use **Add to Workspace**, DO NOT use **Check Out.**



#### Server Workspace File Windchill Registration for CREO 2.0 Register New Server... k Set as Primary Server Reg File -Home Process: New Manage Session 🗟 Open Select File & Manage Session & Server Manager By Erase Current. Remove an object in the active window from Save Select Server & Register New Server... Erase Not Displayed Save As Remove all objects not in windows from this session. Enter Windchill and the Location of the Server: Print & Frase Unused Model Rens. Close https://windchill-vm.aps.anl.gov/Windchill 1) Update Index Select Check... to verify the server Manage File Create or update the instance index file for a specified directory. Prepare Play Trail File Login using your User name and Password Play a trail file Select a default Workspace Server management Add a server to your folder navigator and set Help X Server Property Select OK . 0ptions 🗹 d 🔝 Server management Right click on the Windchill server and Set as Add a server to your folder navigator and X Exit Name: Windchill set active working area. **Primary Server** Folder Tree Location: https://windchill.aps.anl.gov/Windchill Notice the blue diamond indicating the active Welcome Server and also that Status it is Online Check. Warning: Cancel 4 OK All users MUST name the server identically as Server Registry shown on the previous page. File Server Workspace Config.pro & other settings rely on this being Servers Cache Windchill identically set for ALL USERS. Server Status 🕵 pat User name: <NO SERVER> 5 8 Server Name to be used when registering Register New Server... Password: ... Set as Primary Server VD fire = Windchill Remember my password Delete Del Work Offline URL = https://windchill-vm.aps.anl.gov/Windchill Server Active Workspa ProE Cable Assy Cable Asser Servers Cache 6 Workspace on Demo Organ Servers Workspace on ... Engineering Server Status <NO SERVER> Windchill Online

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# System Log-In Instructions Vault Refresher PDMLink Refresher



#### Vault Refresher

| Autodesk Vault Professional 2011     |                    |                               | 00 B                      | and the second second  | 8             |                  |                      | 0 %          |
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| All Folders                          |                    | File Name /                   | Revision                  | State                  | Created By    | Checked In       | Comment              |              |
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| Contract Explorer (a)                |                    | 4105090506-260000-06.dwg      | 00                        | Work in Progress       |               | 5/3/2011 10:02   |                      | -            |
|                                      |                    | Buuxml                        |                           | in one in the ogenesis | Administrator | 12/8/2010 5:10   |                      | -            |
|                                      |                    | Inventor.ipi                  |                           |                        | Administrator | 12/8/2010 5:11   | Autoloader upload to | -            |
|                                      |                    | Vault Master Project.ipi      |                           |                        | ANL\brianr    | 3/19/2012 2:44   |                      |              |
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| My Worklist                          |                    |                               |                           |                        |               |                  |                      |              |
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|                                      | Thumbnail          | File Name                     | Revision                  | State (Historical)     | Created By    | Checked In       | Comment              |              |
|                                      |                    |                               |                           |                        |               |                  |                      |              |
|                                      |                    |                               |                           |                        |               |                  |                      |              |
| Add new group                        | •                  | Vault Master Project.ipj      |                           |                        | ANL\brianr    | 3/19/2012 2:44   |                      |              |
|                                      |                    |                               |                           |                        |               |                  |                      |              |
| 1 All Folders                        |                    |                               |                           |                        |               |                  |                      |              |
| C Vault Explorer                     |                    | 1                             | 1                         |                        |               |                  |                      |              |
| Change Order List                    |                    |                               |                           |                        |               |                  |                      |              |
|                                      |                    |                               |                           |                        |               |                  |                      |              |
| *                                    |                    |                               |                           |                        |               |                  |                      |              |
| 6 File(s) (1 selected)               |                    |                               |                           |                        |               | cadst            | ore ANL_VAULT 🔃 A    | NL\brianr    |
|                                      |                    |                               |                           |                        |               |                  |                      |              |

#### Vault Refresher

- Expand "Vault Explorer" to view the vault content.
- The file structure is then shown to access the file areas.
  - AutoCAD is the AutoCAD content.
  - Inventor contains the Inventor files created.
- Expand the different content directories to show the hierarchy.





#### Vault Refresher - Viewing MetaData

- Viewing of Meta
  - Default view \_
- Right Click to sh
- Select "Fields..."

Customize Fields

- Choose "All File
- You then have t

| g of Metadata properties in Vault<br>fault view shows very little.<br>Click to show "Customize View…"<br>"Fields…"<br>e "All File Fields" under "Select available<br>en have the full Meta Data list.  | Search Vault Explorer (\$)         Search Vault Explorer (\$)         ©       File Name       Revision       State       Created By       Checked In       Comment         ©       220209-100007-05.dwg       00       Work in Progress       ANLInk       6/3/2011 301 PM         ©       220210-10002-03.dwg       00       Wc       Image: Comment       6/3/2011 301 PM         ©       220210-10002-03.dwg       00       Wc       Image: Comment       6/3/2011 301 PM         ©       Image: Comment       Image: Comment       6/3/2011 301 PM       Image: Comment       6/3/2011 301 PM         Image: Comment       Image: Comment       Image: Comment       6/3/2011 301 PM       Image: Comment   |
|--|---|
| Customize Fields         Select available fields from:         All File fields         Available fields:         Author         Category Glyph (Historical)         Category Name         Category Name (Historical)         Checked By         Checked In (Date Only)         Checked In (Date Only)         Checked Out By         Checked Out By         Checked Out By         Checked Out Machine         CHECKER         Classification         Comments         Comments         Commany         Controlled By Change Order             OK             OK | Cother Settings Choose white Customize Fields  Reset Reset setting  Reset R |

### Vault Refresher - Viewing MetaData

- Highlight the fields you wish to view using "Ctrl" to highlight more than one
- Select "Add->" to add the fields to the view. Below are the standard fields typically displayed in PDMLink.
  - FILE NAME, RELEASE\_LEVEL, STATE, REV NUMBER, VERSION, ELEC\_FILE\_NAME, DESIGNER, RESP\_ENG, GROUP\_LEADER, TITLE1, TITLE2, TITLE3, TITLE4, TITLE5, WBS
- Select "OK" when done and your view is set.



| Autodesk Vault Professional 2011          |  |                 |                            |               | that Road and    | And and a diversity of the |          |         |                |          |            |            |         |         |          |         |        | - 0 X            |   |
|---|--|-----------------|----------------------------|---------------|------------------|----------------------------|----------|---------|----------------|----------|------------|------------|---------|---------|----------|---------|--------|------------------|---|
| <u>Eile Edit View Go Tools Actions He</u> | elp  |                 |                            |               |                  |                            |          |         |                |          |            |            |         |         |          |         |        |                  | Ę |
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| 🔲 All Files 🔹 📄 🗔                         | All Files 🔹 📄 📸 🕅 Workspace Sync 💂 📰 Change Category 🕞 Change State 🕞 Revise 💂 |                 |                            |               |                  |                            |          |         |                |          |            |            |         |         |          |         |        |                  |   |
| Vault Explorer                            | E A  | <b>CIS</b>      |                            |               |                  |                            |          |         |                |          |            |            |         |         | Sear     | ch ACIS |        | <b>*</b>         | 8 |
| All Folders                               |  | <b>A A O</b>    |                            |               | o                |                            |          |         |                | . ·      |            |            | 7771 54 | 7771 50 | TTT: 122 |         |        |                  |   |
| E Vault Explorer (\$)                     |  | $\otimes$ U U I | File Name /                | RELEASE_LEVEL | State            | Rev Number                 | Revision | Version | ELEC_FILE_NAME | Designer | RESP_ENG   | GP_LEADER  | TITLE1  | TITLE2  | TITLES   | IIILE4  | TITLES | WBS              |   |
| 🖃 🛅 AutoCAD                               | 1  |                 | a 3105032008-850100-00.dwg | WIP           | Work in Progress | 00                         | 00       | 5       | Αχοσχοσα       |          | R. HOGREFE | G. MARKOV  | STOR R  | SAFETY  | 01BM     | ACIS-P  | BLOCK  | X.1.3.5.3.20.1   |   |
| ACIS                                      |  |                 | a 3105032008-850111-00.dwg | WIP           | Work in Progress | 00                         | 00       | 1       | Ахооооох       |          | R. HOGREFE | G. MARKOVI | STOR RI | SAFETY  | 01BM G   | ACIS-P  | SCHEM  | X.1.3.5.3.20.1   |   |
| Archive Drawings                          |  |                 | 3105032008-850121-00.dwg   | WIP           | Work in Progress | 00                         | 00       | 1       | Ахооохох       |          | R. HOGREFE | G. MARKOVI | STOR RI | SAFETY  | 01BM G   | GLOBA   | PERMIT | X.1.3.5.3.20.1   |   |
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|   |  |                 |                            |               |                  |                            |          |         |                |          |            |            |         |         |          |         |        |                  |   |

#### Vault Refresher - Release Level

- Release\_Level and State act the same but are not the same.
  - Release\_Level is the current level of the drawing, this is displayed on the title block.
    - WIP, still working on the drawing
    - Released, ready for workflow.
  - State is the current status in the approval process, system variable in Vault.
    - Work in Progress, release process has not begun.
    - Pending, files going through the process
    - Released, files completed the process.

| 0 🔊 | U | $\bigcirc$ | D        | File Name /              | RELEASE_LEVEL | State            | Rev Number | Revision |
|-----|---|------------|----------|--------------------------|---------------|------------------|------------|----------|
|     |   |            |          | 3105032013-850111-00.dwg | WIP           | Work in Progress | 00         | 00       |
|     |   |            |          | 3105032013-850121-00.dwg | WIP           | Work in Progress | 00         | 00       |
|     |   |            |          | 3105032013-870100-00.dwg | WIP           | Work in Progress | 00         | 00       |
|     |   |            |          | 3105032013-870111-00.dwg | WIP           | Work in Progress | 00         | 00       |
|     |   |            |          | 3105032013-870121-00.dwg | WIP           | Work in Progress | 00         | 00       |
|     |   |            |          | 3105032035-810101-00.dwg | RELEASED      | Pending          | 00         | 00       |
|     |   |            | <u>^</u> | 3105032035-810201-00.dwg | RELEASED      | Pending          | 00         | 00       |
|     |   |            | <u>*</u> | 3105032035-820101-00.dwg | RELEASED      | Pending          | 00         | 00       |
|     |   |            | <u>^</u> | 3105032035-820101-01.dwg | RELEASED      | Pending          | 01         | 01       |
|     |   |            | <u>*</u> | 61801-000000-00.dwg      | RELEASED      | Pending          | 00         | 00       |
|     |   |            |          | 6180101-150101-00.dwg    | RELEASED      | Pending          | 00         | 00       |
|     |   |            | <u>^</u> | 6180101-150101-01.dwg    | RELEASED      | Pending          | 01         | 00       |
|     |   |            |          | 6180101-210101-00.dwg    | RELEASED      | Pending          | 00         | 00       |
|     |   |            | <u>^</u> | 6180101-260101-00.dwg    | RELEASED      | Pending          | 00         | 00       |
| •   |   |            |          | 6180101-310101-00.dwg    | RELEASED      | Pending          | 00         | 00       |
|     |   |            |          | 6180101-310101-01.dwg    | RELEASED      | Pending          | 01         | 00       |

#### Vault Refresher - Adding a file to Workspace

- To "Get" a file into your workspace
  - Select the file or files you would like to add to your workspace
  - Right click and select "Get / Checkout".

|                | 3105           | 105032008-850111-00.dwg WIP |                       |      |  |  |  |  |  |
|----------------|----------------|-----------------------------|-----------------------|------|--|--|--|--|--|
|                | 3105           | 032008                      | 3-850121-00.dwg       | WIP  |  |  |  |  |  |
|                | 3105           |                             | Open                  |      |  |  |  |  |  |
|                | 3105           | 2                           | View in Window        |      |  |  |  |  |  |
|                | 3105           |                             | Check In              |      |  |  |  |  |  |
|                | 3105           |                             | Get / Checkout        |      |  |  |  |  |  |
|                | 3105           |                             | Get / Checkout        |      |  |  |  |  |  |
|                | 🛓 3105         | 0                           | Undo Check Out        | · ·  |  |  |  |  |  |
|                | A 2105         | 4 🕟                         | Change State          |      |  |  |  |  |  |
| History Uses   | Where <b>l</b> | J: 👌                        | <u>C</u> opy Design   |      |  |  |  |  |  |
| Number of ver  | sions:         |                             | Create Shortcut       | nat  |  |  |  |  |  |
| Number of revi | isions:        | ×                           | <u>D</u> elete        |      |  |  |  |  |  |
| Thumhnail      | File           | N                           | <u>P</u> urge         | tio  |  |  |  |  |  |
| mambhair       | The            |                             | <u>R</u> ename        | sion |  |  |  |  |  |
| P              |                | Ð                           | New Change Order      |      |  |  |  |  |  |
| • <b>• •</b>   | 6180           | 1                           | Add to Change Order   | 00   |  |  |  |  |  |
|                |                |                             | Go to Working Folder  |      |  |  |  |  |  |
|                |                |                             | Go To Fo <u>l</u> der |      |  |  |  |  |  |

| ] Get / Cheo         | k Out - 31050320      | 08-850121-00 | .dwg        |           |         |   |      |
|----------------------|-----------------------|--------------|-------------|-----------|---------|---|------|
| Select Rev           | vision:               |              |             |           |         |   |      |
| Latest               | Work in Progre        | ss 310503.   | 2008-850121 | L-00.dwg  |         |   | - 4  |
|                      |                       |              |             |           |         |   |      |
|                      |                       |              |             |           |         |   |      |
| Check O              | ut                    |              | Revision    | State     |         |   |      |
| 📃 🕍                  | 3105032008-8501       | 21-00.dwg    | 00          | Work in P | rogress |   |      |
|                      |                       |              |             |           |         |   |      |
|                      |                       |              |             |           |         |   |      |
|                      |                       |              |             |           |         |   |      |
|                      |                       |              |             |           |         |   |      |
|                      |                       |              |             |           |         |   |      |
|                      |                       |              |             |           |         |   |      |
|                      |                       |              |             |           |         |   |      |
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|                      |                       |              |             |           |         |   |      |
| Check ou<br>Download | t 0 files<br>I 1 file |              |             |           |         | ₽ |      |
|                      |                       | ОК           | Cance       |           | Help    | 5 | · >> |

#### Vault Refresher - Workspace File Locations

- Local workspaces are located on the C: drive under "Vault".
  - C:\Vault\\*\*\*\*
- The directory structure in Vault is duplicated in the local workspace.
  - So a file in AutoCAD ACIS in Vault is located in "C:\Vault\AutoCAD\ACIS" on your hard drive.

| Organize 👻 Include in library                     | • | Share with 🔻 🛛 Burn New folder |  |                         |
|---|---|--------------------------------|--|-------------------------|
| iii USR   | * | Name                           | Date modified                          | Туре                    |
| Vault   |   | \mu ACIS<br>🔊 31-801501.dwg    | 4/16/2012 3:23 PM<br>3/22/2012 5:11 PM | File folder<br>DWG File |
| ACIS  |   | 🔺 4332-100000-01.dwg           | 3/20/2012 1:25 PM                      | DWG File                |
| Content Center Files Inventor Vault Administrator |   | ▲ 4332-200000-01.dwg           | 3/21/2012 11:29 AM                     | DWG File                |



# System Log-In Instructions Vault Refresher PDMLink Refresher



#### PDMLink Refresher - Adding a file to Workspace

 Adding a file to reference or review does not require a "Check Out" please use "Add to Workspace".

| Ho <u>m</u> e | Product  | <u>C</u> hange  | <u>L</u> ibrary  |                |          |                |                 |     |
|---------------|--|-----------------|------------------|----------------|----------|----------------|-----------------|-----|
| Products      | s 🔻 🛛 Detai  | ils Folders     | Workspaces       | Packages       | Team     | Assignments    | Change Monitor  | Dis |
| Product       | t: APS Pro   | duct 📔          |                  |                |          |                |                 |     |
| Actions •     | 🗸 🗅 St   | orageRing       | I                |                |          |                |                 |     |
| Locatio       | n: / <u>APS F</u>  | Product / Prod  | uction / Storage | eRing          |          |                |                 |     |
|               |  |                 |                  |                |          |                |                 |     |
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|               |  |                 | orkspat          | Workspace      | Folder   | Document       | Documents       |     |
|               |  | Numt            | ber              | Add t          | o Worksp | ace            |                 | /   |
|               | Image: A state of the state | 21060           | 2-301206_OLD     | .DRW           | <u> </u> | 602-301206_old | <u>.drw</u> (i) | 1   |
|               | <b>v</b>   | 21060           | 2-301206_OLD     | .PRT           | 210      | 602-301206_old | .prt 🛈          | ł   |
|               |  |                 |                  |                |          |                |                 |     |

#### PDMLink Refresher - Opening a file from Workspace

- When you open a file from workspace, that was intended for reference but then change a value the following "Conflict" error will appear.
  - The following options are given to you to proceed:
    - Check Out Now: Checks the file out for editing, but locks the file to any other user unless you "Undo Checkout" later. (Use Sparingly)
    - Revise and Check Out Now: Does two things, Adds a revision to the file 00->01, and checks out 01 for changes. (Do Not Use)
    - Continue: Allows you to change the file but disconnects the file from CommonSpace. Investigating changes that will not be kept. (Do not Use)
    - Make Read Only: Make the file read only for reference. (Best Option)



#### **PDMLink Refresher - Adding Titles under the Icons**



| Arg           |                 | dvanced<br>hoton<br>burce | INDCHILL*        |          |            |          |          | Event Manage  | r   Clipbo<br>R | ard I Hel<br>ecently A | p <del>▼</del> IE-mail Pa<br>ccessed <del>▼</del> IS |
|---------------|-----------------|---------------------------|------------------|----------|------------|----------|----------|---------------|-----------------|------------------------|--|
| Ho <u>m</u> e | Product Ch      | ange <u>L</u> it          | orary            |          |            |          |          |               |                 |                        |  |
| Overview      | Assignments     | Updates                   | Checked-Out Work | Packages | Workspaces | Meetings | Notebook | Subscriptions | Reports         | Utilities              |  |
| Welcome       | e, Brian Rustho | ven                       |                  |          |            |          |          |               |                 |                        | <b>*</b> 1 10000                                     |
|               |                 |                           |                  |          |            |          |          |               |                 | Mino                   | arch within prefer                                   |

- Select "Home" then the Minor Tab "Utilities"
- Select "Preference Manager"
- Now "Search within preferences" for "icon"
- "Display" "Toolbar Action Descriptions" set to "Yes"
  - Select the "Pencil" and change it to "Yes"
  - Select "OK"
- This is set permanently until you change it again.





| Preference Manager View: Standard 🗸 🎚 ?  |   |  |       |  |  |  |  |  |  |  |  |
|--|---|--|-------|--|--|--|--|--|--|--|--|
| 💌 🕨 🎆  |   |  |       |  |  |  |  |  |  |  |  |
| Name   | t |  | Value | Description  |  |  |  |  |  |  |  |
| □ Display  |   |  |       |  |  |  |  |  |  |  |  |
| Toolbar Action Descriptions  |   |  | No    | Controls the display of the action description under the ic $\ \underline{\ }$ |  |  |  |  |  |  |  |
| Part Management     Set preference   |   |  |       |  |  |  |  |  |  |  |  |
| Set Preference         Name: Toolbar Action Descriptions         Description: Controls the display of the action description under the icon in the toolbar area of tables a trees.         Context: User - Brianr         Value: Yes         No         * Indicates required fields. |   |  |       |  |  |  |  |  |  |  |  |