

System Log-In Instructions

Vault Refresher

PDMLink Refresher

Brian Rusthoven

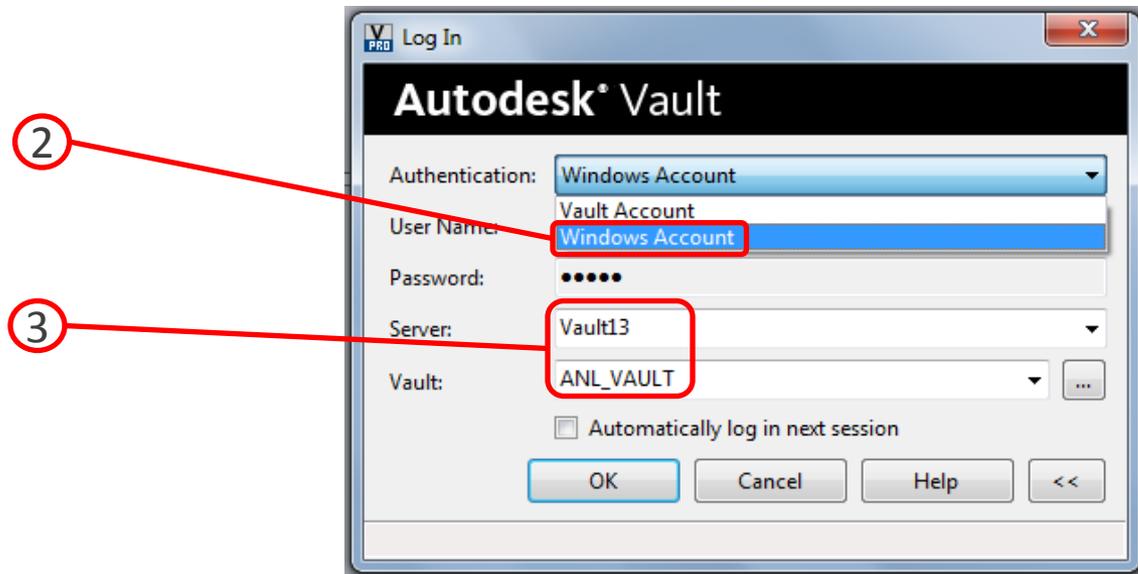
Updated - January 2013

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



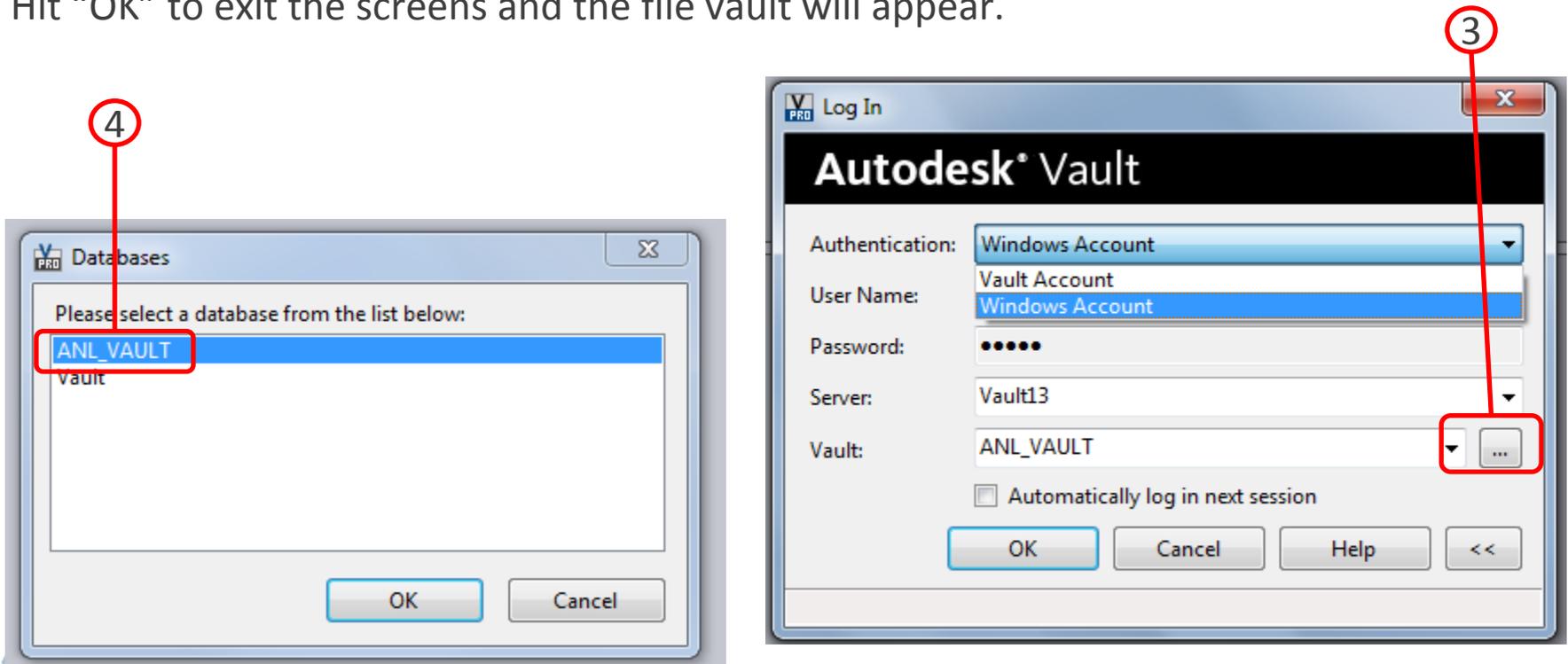
Vault Login Instructions

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.



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>

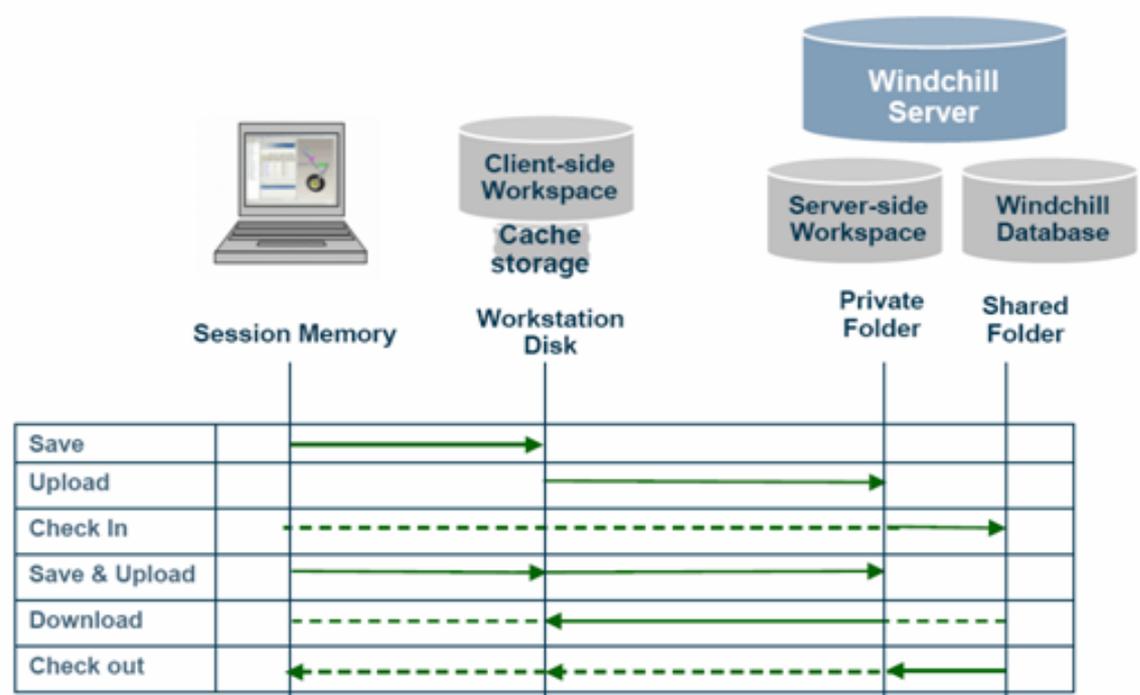
Your login is based on the LDAP user name and password.

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**.



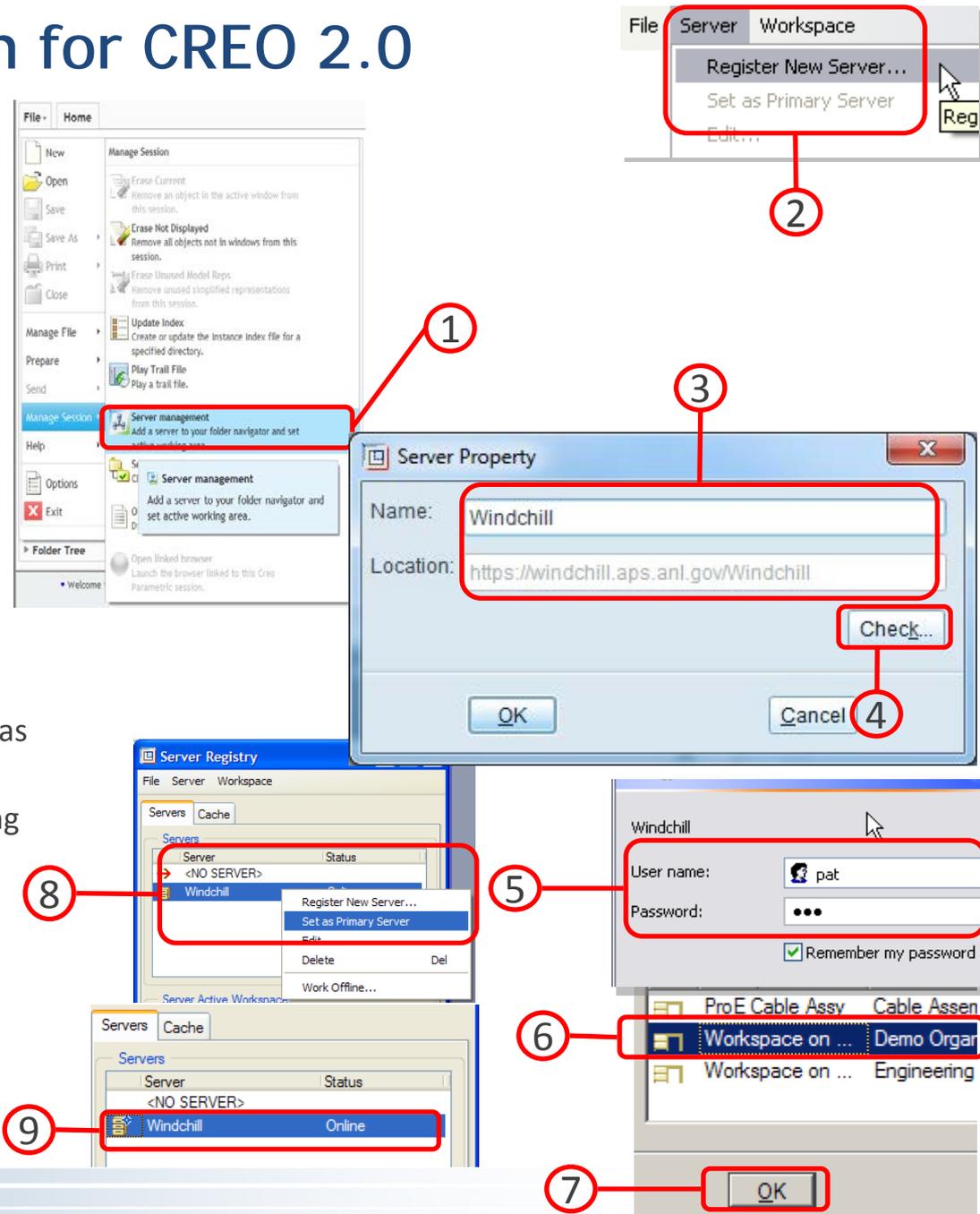
Windchill Registration for CREO 2.0

Process:

- 1) Select File & Manage Session & Server Manager
- 2) Select Server & Register New Server...
- 3) Enter **Windchill** and the Location of the Server:
 - 1) <https://windchill-vm.aps.anl.gov/Windchill>
- 4) Select Check... to verify the server
- 5) Login using your User name and Password
- 6) Select a default Workspace
- 7) Select OK .
- 8) Right click on the Windchill server and Set as Primary Server
- 9) Notice the **blue diamond** indicating the active Server and also that Status it is Online

Warning:

- All users MUST name the server identically as shown on the previous page.
- Config.pro & other settings rely on this being identically set for ALL USERS.
- Server Name to be used when registering Windchillfire = **Windchill**
- URL = <https://windchill-vm.aps.anl.gov/Windchill>



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Vault Refresher

PDMLink Refresher

Vault Refresher

Autodesk Vault Professional 2011

File Edit View Go Tools Actions Help

New Plot... Print... Check In... Find... ?

All Files Workspace Sync... Change Category... Change State... Revise...

All Folders

- All Folders
 - ANL_VAULT - ANL\brianr
 - Change Order List
 - Vault Explorer (\$)
 - My Search Folders

My Worklist

- ECO-000007 (1/16/2012)

My Shortcuts

[Add new group](#)

- All Folders
- Vault Explorer
- Change Order List

Vault Explorer (\$) Search Vault Explorer (\$)

| File Name | Revision | State | Created By | Checked In | Comment |
|--------------------------|----------|------------------|---------------|--------------------|-------------------------|
| 220209-100007-05.dwg | 00 | Work in Progress | ANL\rrk | 6/3/2011 3:01 PM | |
| 220210-100002-03.dwg | 00 | Work in Progress | ANL\rrk | 2/19/2011 8:31 ... | |
| 4105090506-260000-06.dwg | 00 | Work in Progress | ANL\pitts | 5/3/2011 10:02 ... | |
| Buu.xml | | | Administrator | 12/8/2010 5:10 ... | |
| Inventor.ipj | | | Administrator | 12/8/2010 5:11 ... | Autoloader upload to... |
| Vault_Master_Project.ipj | | | ANL\brianr | 3/19/2012 2:44 ... | |

History Uses Where Used Change Order Preview

Number of versions: 8 (Does not match any version)

Number of revisions: 1 Show all versions

| Thumbnail | File Name | Revision | State (Historical) | Created By | Checked In | Comment |
|-----------|--------------------------|----------|--------------------|------------|--------------------|---------|
| | Vault_Master_Project.ipj | | | ANL\brianr | 3/19/2012 2:44 ... | |

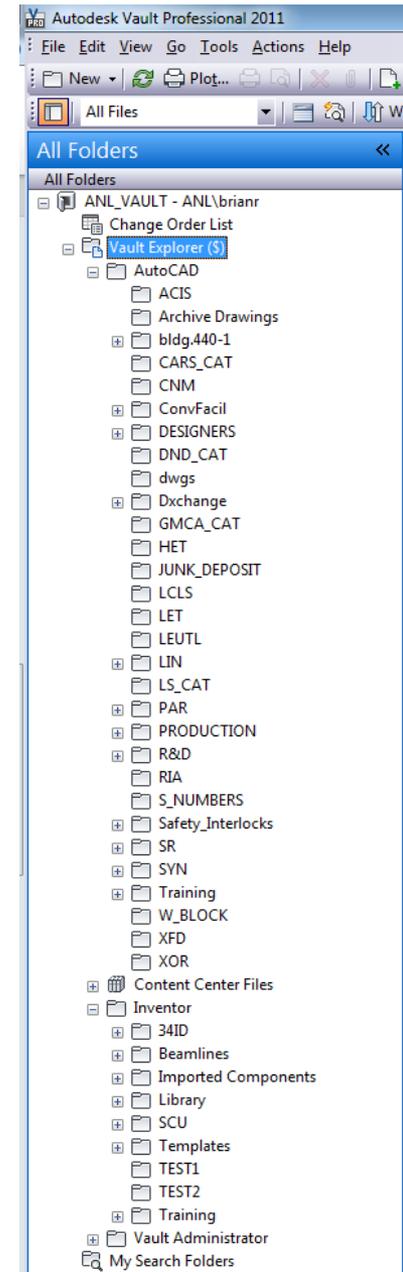
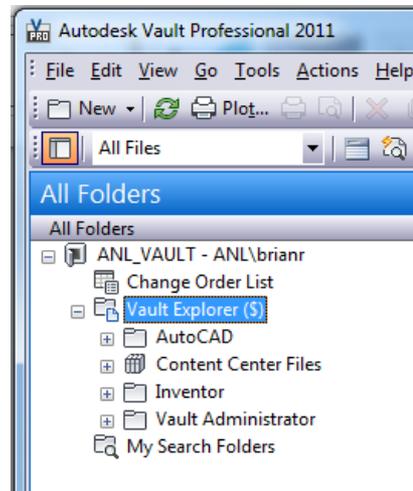
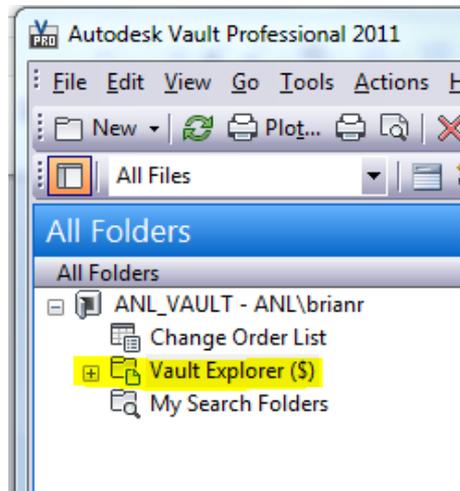
6 File(s) (1 selected)

cadstore ANL_VAULT ANL\brianr



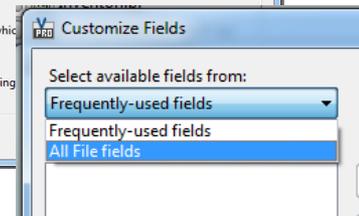
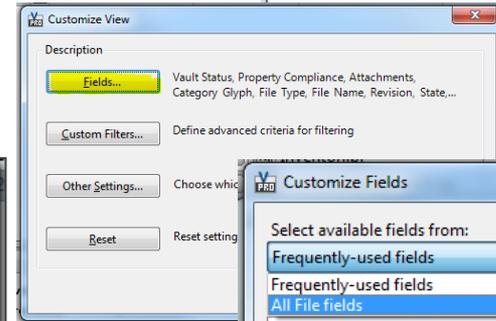
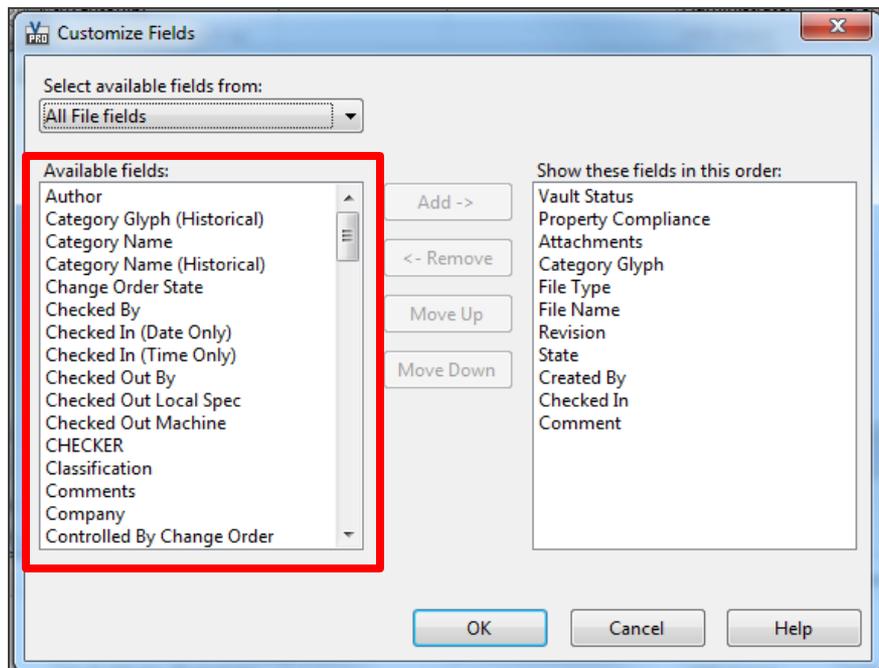
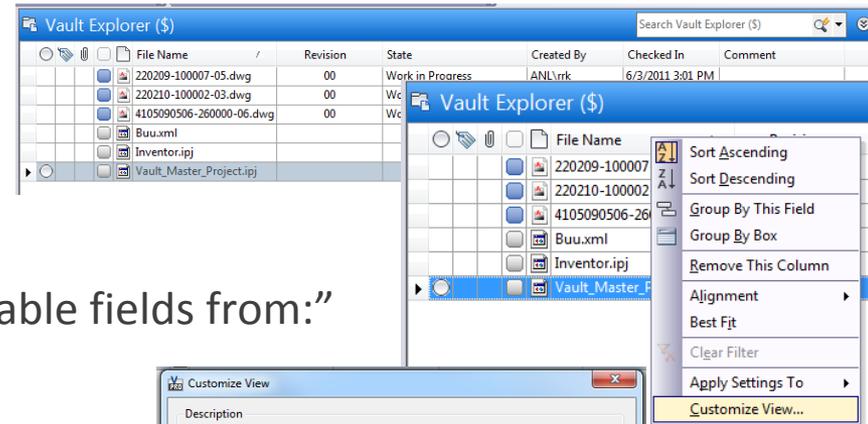
Vault Refresher

- 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.



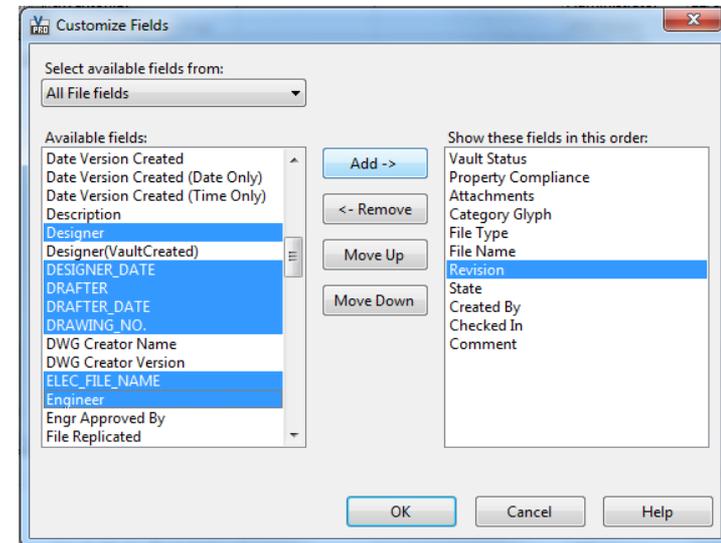
Vault Refresher - Viewing MetaData

- Viewing of Metadata properties in Vault
 - Default view shows very little.
- Right Click to show “Customize View...”
- Select “Fields...”
- Choose “All File Fields” under “Select available fields from:”
- You then have the full Meta Data list.



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.



| File Name | RELEASE_LEVEL | State | Rev Number | Revision | Version | ELEC_FILE_NAME | Designer | RESP_ENG | GP_LEADER | TITLE1 | TITLE2 | TITLE3 | TITLE4 | TITLE5 | WBS |
|--------------------------|---------------|------------------|------------|----------|---------|----------------|----------|---------------|--------------|------------|-----------|------------|-----------|-----------|------------------|
| 3105032008-850100-00.dwg | WIP | Work in Progress | 00 | 00 | 5 | Axxxxxxxx | . | R. HOGREFE | G. MARKOV... | STOR RL... | SAFETY... | 01BM ... | ACIS-P... | BLOCK ... | X.1.3.5.3.20.1 |
| 3105032008-850111-00.dwg | WIP | Work in Progress | 00 | 00 | 1 | Axxxxxxxx | . | R. HOGREFE | G. MARKOV... | STOR RL... | SAFETY... | 01BM G... | ACIS-P... | SCHEM... | X.1.3.5.3.20.1 |
| 3105032008-850121-00.dwg | WIP | Work in Progress | 00 | 00 | 1 | Axxxxxxxx | . | R. HOGREFE | G. MARKOV... | STOR RL... | SAFETY... | 01BM G... | GLOBAL... | PERMIT... | X.1.3.5.3.20.1 |
| 3105032008-870100-00.dwg | WIP | Work in Progress | 00 | 00 | 1 | Axxxxxxxx | . | R. HOGREFE | G. MARKOV... | STOR RL... | SAFETY... | 01ID GE... | ACIS-P... | BLOCK... | X.1.3.5.3.20.1 |
| 3105032008-870111-00.dwg | WIP | Work in Progress | 00 | 00 | 1 | Axxxxxxxx | . | R. HOGREFE | G. MARKOV... | STOR RL... | SAFETY... | 01ID GE... | ACIS-P... | SCHEM... | X.1.3.5.3.20.1 |
| 3105032008-870121-00.dwg | WIP | Work in Progress | 00 | 00 | 2 | A | . | J. FORREST... | G. MARKOV... | STOR RL... | SAFETY... | 08ID GE... | GLOBAL... | INTERF... | X.1.3.1.5.3.20.8 |

Vault Refresher - Release Level

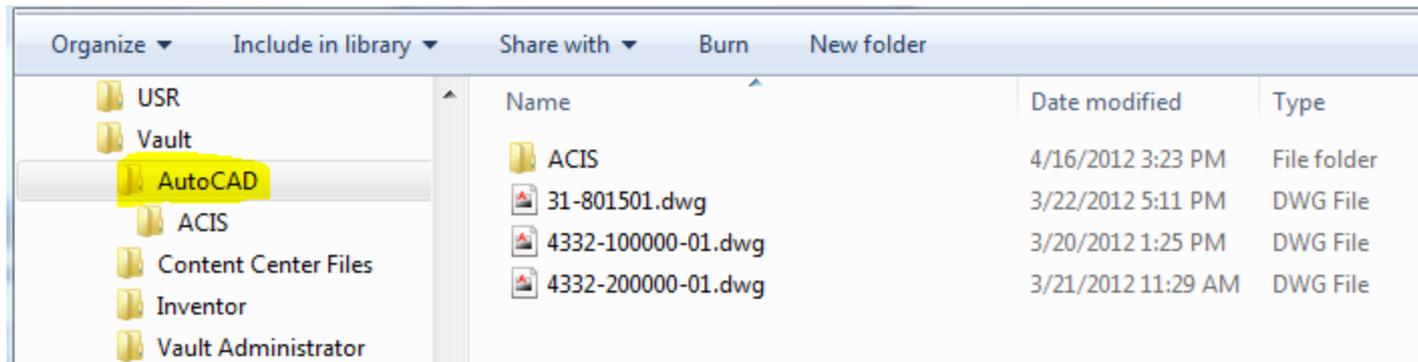
- Release_Level and State act the same but are not the same.
 - Release_Level is the current level of the drawing, this is displayed on the title block.
 - WIP, still working on the drawing
 - Released, ready for workflow.
 - State is the current status in the approval process, system variable in Vault.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

| | | | 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 |
| | | | 3105032035-810201-00.dwg | RELEASED | Pending | 00 | 00 |
| | | | 3105032035-820101-00.dwg | RELEASED | Pending | 00 | 00 |
| | | | 3105032035-820101-01.dwg | RELEASED | Pending | 01 | 01 |
| | | | 61801-000000-00.dwg | RELEASED | Pending | 00 | 00 |
| | | | 6180101-150101-00.dwg | RELEASED | Pending | 00 | 00 |
| | | | 6180101-150101-01.dwg | RELEASED | Pending | 01 | 00 |
| | | | 6180101-210101-00.dwg | RELEASED | Pending | 00 | 00 |
| | | | 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 - 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.



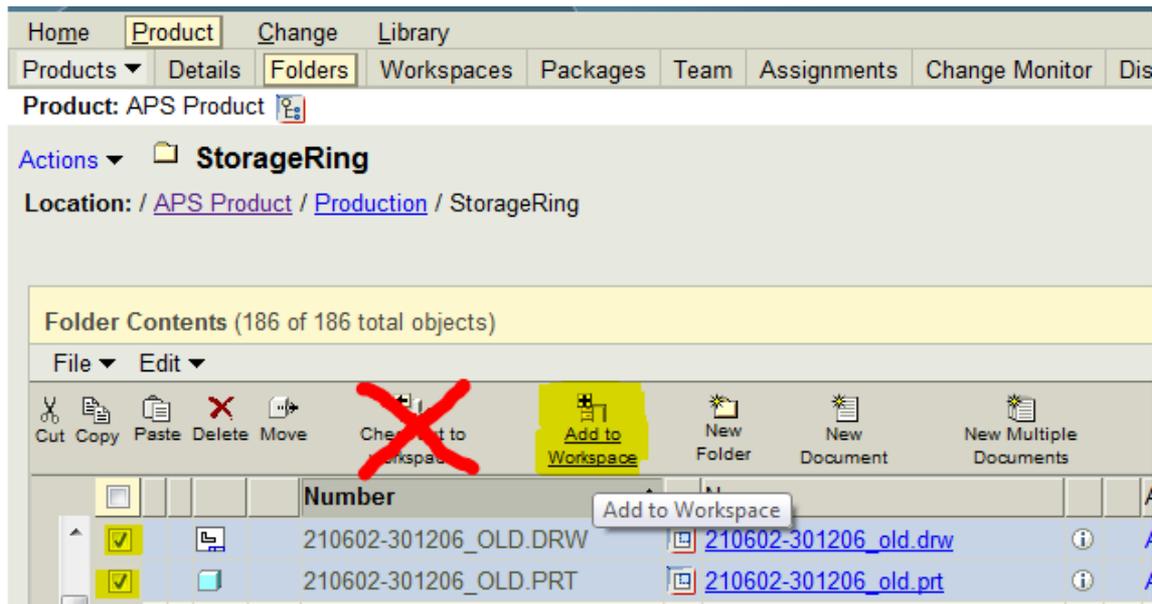
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PDMLink Refresher

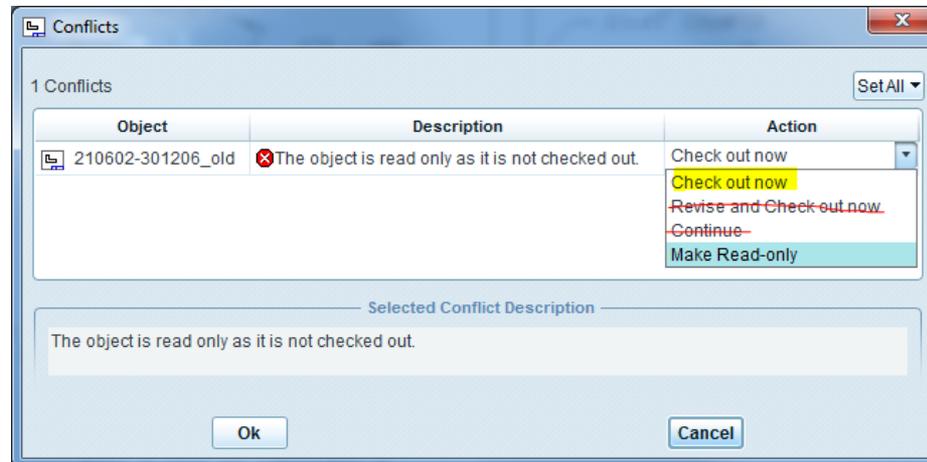
PDMLink Refresher - Adding a file to Workspace

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

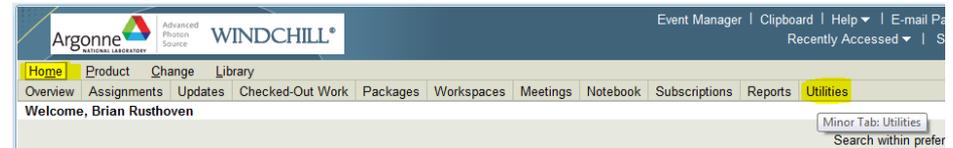
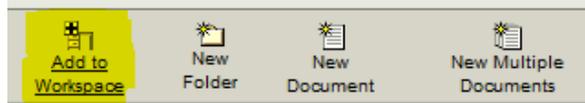


PDMLink Refresher - Opening a file from Workspace

- 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



- 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.

