3.2 What You See

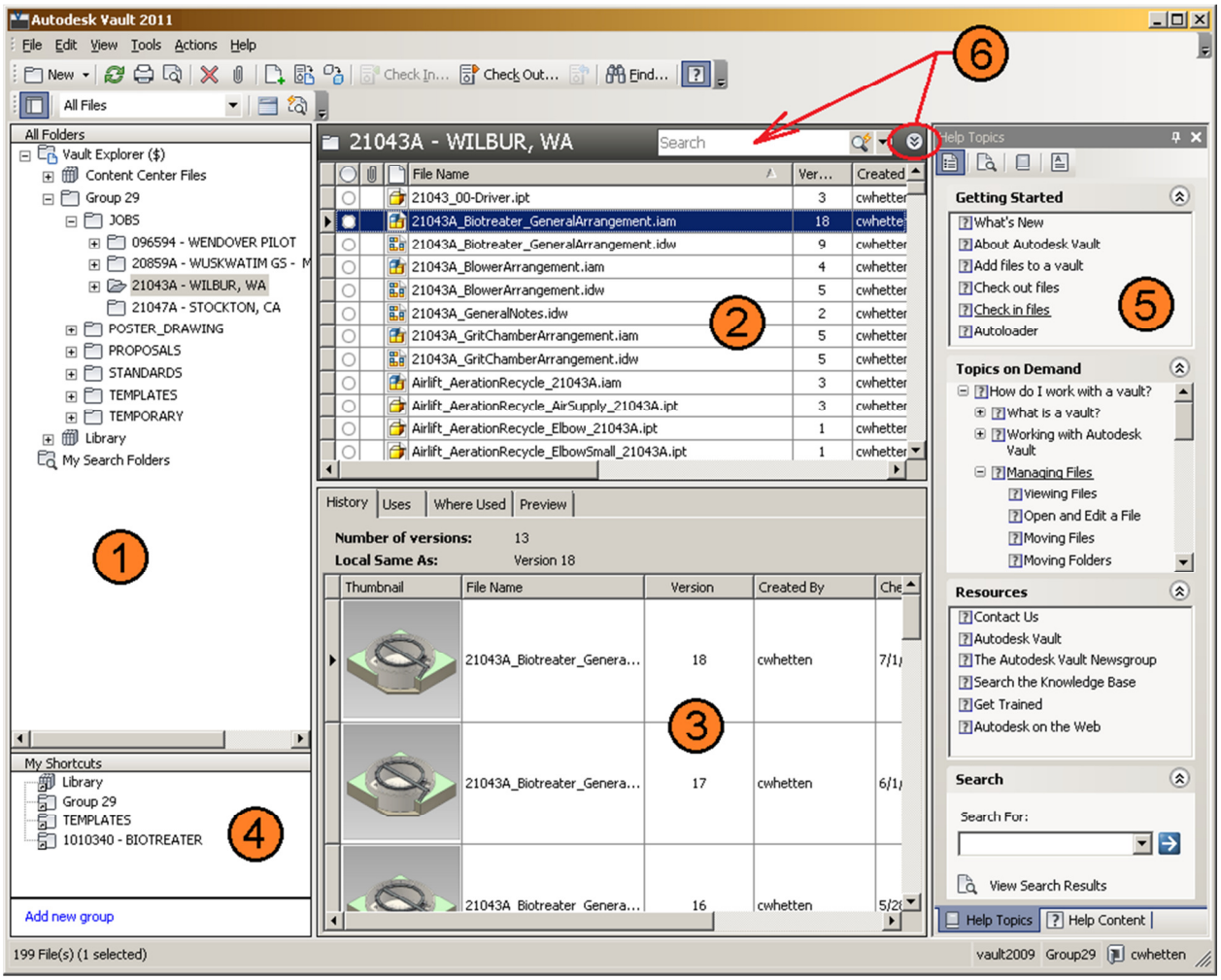

Figure 3 - Autodesk Vault Interface

The Autodesk Vault client application has an interface consisting of 6 basic elements: the folder tree, the file viewing pane, the file information pane, the shortcuts pane, the help pane, and the Query Builder. Each of these elements can be resized to fit the user's needs. Each is described below.

1 – The Folder Tree

The folder tree displays a list of all of the folders found within the current database. Notice that the root folder is called Vault Explorer and is represented by the $ symbol. Notice the different types of folder icons found under the root folder. These are described in section 3.3. Clicking on any folder will populate the file viewing pane.

2 – The File Viewing Pane

The file viewing pane lists every file that is contained within the selected folder. It does not list subfolders as these are displayed in the folder tree. Each listed file has several columns of information. These columns can be customized to fit the user's needs, but the basic ones include the file status (represented by the white circle in the column header), the file type (represented by the white sheet of paper), the file name, the current version number, the user who created the current version, the check-in date, and any comments included when the current version was created. Selecting any file will populate the file information pane.

3 – The File Information Pane

The file information pane displays 4 types of information about the selected file. Each of these types is displayed in its own tab and these are History, Uses, Where Used, and Preview.

The **History** tab displays a version history for the selected file. Each version is displayed with a thumbnail image, file name, version, etc. The file history can be useful in tracking the evolution of a design or for rolling back to a previous stage in the design. Adding comments when checking in a file can greatly help with tracking file history.

The **Uses** tab displays a structured view of all of the children of the selected file. In other words, this tab displays every file that the selected file uses. This is very useful for viewing the inter-file relationships of a design.

The **Where Used** tab displays a structured view of all of the parents of the selected file. In other words, this tab displays every file where the selected file is being used. This is also very helpful for viewing the inter-file relationships of a design.

The **Preview** tab displays a DWF version of the selected file. This preview is able to be zoomed and rotated (if applicable) with the tools provided in the viewing window. If the window displays the message "Unable to view the file selected", then a visualization file is not available. If this is the case, the file can still be previewed through an external DWF viewer by selecting the Open button on the Preview tab.

4 – The Shortcuts Pane

The shortcuts pane lists any shortcuts that the user has created to help navigate the vault.

5 – The Help Pane

The help pane displays the help documentation for the vault client application. This pane can be undocked and moved around the screen as a separate window if desired. It can also be closed to free up screen space for the other panes. If closed, the help pane will be restored later whenever the help menu is accessed.

6 – The Query Builder

The query builder is the vault client's integrated search function. By clicking on the Expand button circled in Figure 3, the query builder is expanded to give more search options. A detailed treatment of the search functionality is given in section 3.6.

3.3 Folder Structure

The folders displayed in the folder tree are of two main types:

– Normal Folder
– Library Folder

Normal folders contain the bulk of the data that is added to the vault. These are the normal folders that are created as a design is being built.

Library folders are special folders that are meant specifically for standardized files that do not often change. These can be reference parts, vendor-supplied components, standard fittings, etc. These folders restrict access to their files by typically allowing read-only permission. Standard content center parts are stored in this type of folder.

The creation and use of library folders follow the same rules as library folders created when setting up an Inventor project (IPJ) file.

A working folder is specified in the vault client, and this working folder corresponds to a folder on the user's local hard drive. This working folder specifies to which local folder files will be downloaded when they are checked out. Within this working folder, the folder hierarchy will be exactly the same as the hierarchy in the vault.

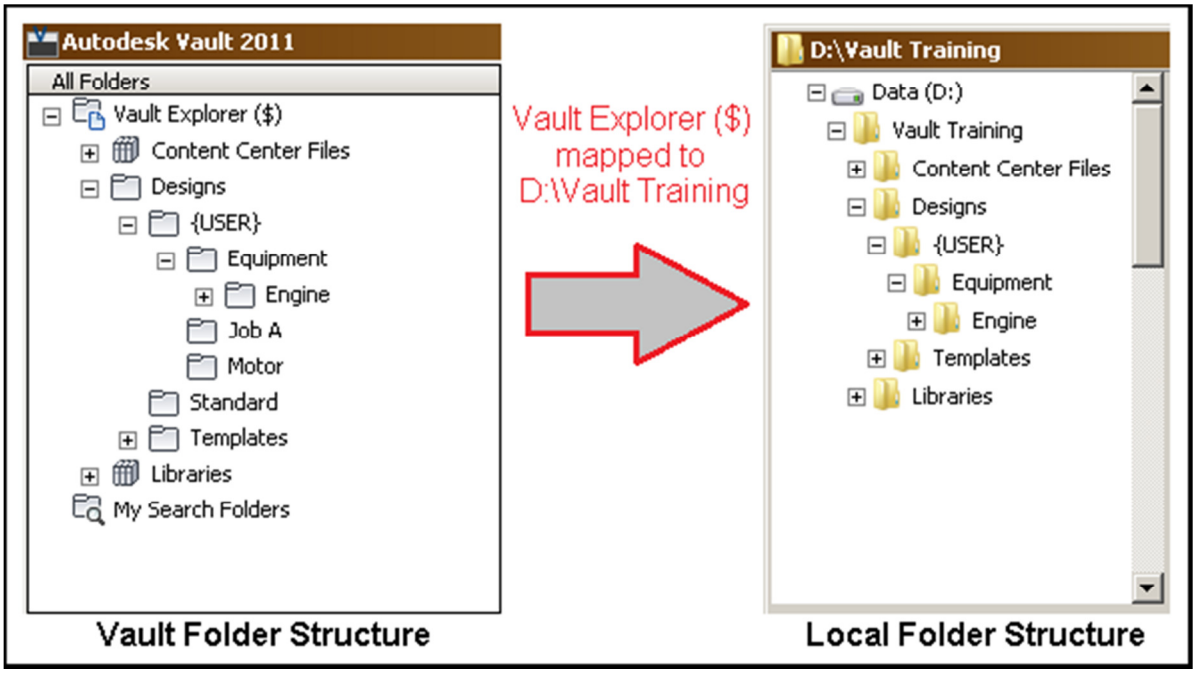

Figure 4 - Matching Folder Structures

In Figure 4, the working folder has been set to "D:\Vault Training" which results in the root vault folder ($) mapping to that local folder.

NOTE: The vault creates local folders only when files contained in the corresponding vault folder are downloaded, so all of the folders found in the vault may not exist on the local hard drive.

3.4 Behind the Scenes

Several operations in the vault client application create or modify files. With each of these operations, the master files stored in the vault database are never directly modified. Instead, each file is checked out to the user and downloaded to a temporary folder on the local disk. All operations are performed on the local copy of the file, and then it is checked in and uploaded to the database where the new file (or the new version of an existing file) is stored.

3.5 Adding Files to the Vault

Files can be added to the vault through either the vault client application or their native application's vault add-in.

IMPORTANT! Files from a CAD application such as Inventor or AutoCAD may contain inter-file relationships. To maintain these relationships, these files must be added through the vault add-in from their native CAD program.

An error message will be displayed if a user attempts to add one of these files through the vault client. Adding a CAD file through its native application is described in section 4.6.

To add non-CAD files to the vault, follow these steps:

1. In the folder tree, right-click the folder to which you wish to add files. From the context menu, select Add Files.
2. The Add Files dialog opens. This displays the contents of the local folder that corresponds to the folder you selected. Browse to the files that you wish to add, select them, and then click Open.
3. The Add Files dialog will change to show the files that were selected. It will also show you where these files will be placed (the vault folder you selected). You can select any of the options available. You can also add a comment to the file which will be displayed for that file in the Comments column of the file information pane.
4. Click OK. The files are uploaded to the vault.
5. Non-CAD files may also be added through their native application's vault add-in if it exists.
6. Non-CAD files may also be added by dragging and dropping them from Windows Explorer to a folder in the vault client application's folder tree.

3.6 Searches: Using the Query Builder

Quick searches can be performed by typing keywords into the search field (item 6 in Figure 3 on page 3-3) and pressing enter. Any files that have any property that includes the keywords will be displayed in the file viewing pane. The scope of this quick search is the selected folder and all subfolders.

The search can be refined by accessing the query builder. The query builder can be accessed in several ways:

A. Clicking the Expand button (circled in Figure 3),
B. On the menu bar, clicking Tools > Find, or
C. Pressing Ctrl+F.

Option A – The Query Bar

Option A expands the query bar shown in Figure 5.

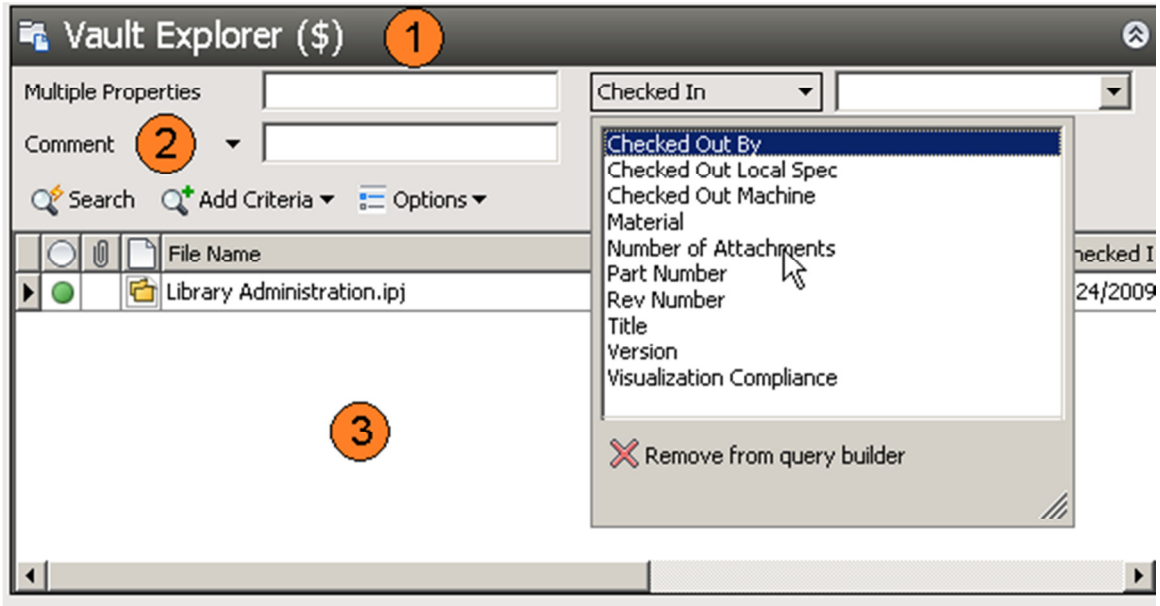

Figure 5 - Searching with the Query Bar

The current scope of the search is listed in the top of the bar, noted by item 1. The scope is the current folder and any subfolders. In the figure, the scope is the entire vault. To change the scope, simply select a different folder in the folder tree.

The search criteria are specified in the area noted by item 2. If a search of all properties is required, type the search term into the Multiple Properties field. If some keywords need to be searched in specific properties, select Add Criteria and select a property. Criteria can be changed by selecting the drop-down arrow next to the property name and selecting a new property. Once the search terms and criteria are prepared, click the Search button.

The findings of the search will be displayed in the file viewing pane noted by item 3.

To save a search, click Options > Save Search.

Options B & C – The Find Dialog

Options B & C open a separate Find dialog box that looks slightly different than the expanded query bar of option A, but the functionality is identical.

The Find dialog offers options for a basic search or a more advanced search, similar to the query bar described above. The scope of the search can be changed by clicking Browse and selecting a new folder.

In the Advanced tab, criteria are specified by selecting a property from the drop-down list, selecting a condition, and typing keywords into the Value field. Clicking Add will add this criterion to the list below. Additional criteria may then be added. Clicking Find Now will execute the search. If there is not at least one criterion in the list, clicking Find Now will list every file in the scope of the search. You must click the Add button even if there is only one search criterion.

To save a search, click File > Save search. To load a previously saved search, click File > Open Search.

Saved Searches

Searches can be saved under any name desired. If the search is saved as a folder, it will be displayed under the My Search Folders node in the folder tree.

Saving a search does not save the results, just the criteria so that the search can be performed again later.

To execute a saved search, select the search from under the My Search Folders. If the search is saved, but not as a folder, then it can only be opened from the Find dialog discussed above.

Saved searches are not stored on the vault server. They are stored only on the user's local computer and can only be accessed by that user.

3.7 Vault File Status

Icons indicate the status of files in the vault. The icons indicate whether a local copy exists, if the local copy is up-to-date, if the local copy is the current version, and so on. The following table contains a legend for the icons.

Icon	Description and Required Action
	If no icon is displayed, the file is in the vault, but you do not have a local copy of the file on your computer. You can quickly identify which files are new to the vault. Use Get / Checkout to retrieve a copy of the file.
	File is in the vault and available to be checked out. The version in your working folder is the same as in the vault. Also referred to as the Latest Version.
	File is in the vault and available to be checked out, but the local version is newer than the latest version in the vault. This typically means that your local file was changed without checking it out.
	File is in the vault and available to be checked out, but the local copy is out of date. Get the latest version from the vault.
	File is checked out to you, but you do not have a local copy of the file on your computer. This can occur if you have not set a working folder, if you previously checked out the file without getting a local copy, or you checked out the file to a location other than your working folder. Use Get / Checkout to retrieve a copy of the file.
	File is checked out to you and the local version is the same as in the vault. Also referred to as the Latest Version.
	File is checked out to you and the local copy is newer than the latest version in the vault. This typically means that you made changes to the file since it was checked out but have not checked it back in.
	File is checked out to you and the local copy is older than the latest version in the vault. This typically means that you started with a version from the vault that was older than the latest version, and then checked it out to promote it to the latest.

Icon	Description and Required Action
	File is checked out by another user, but you do not have a local copy of the file on your computer. Use Get / Checkout to retrieve a copy of the file.
	File is checked out by someone else, and the local copy is the same as in the vault. This typically happens if the other user did not check changes back into the vault.
	File is checked out to someone else, but the local copy is newer than the latest version in the vault.
	File is checked out to someone else, but the local copy is older than the latest version in the vault. This typically happens if the other user checked changes into the vault, but kept the file checked out.
	File has attachments. Check the Uses tab in the file information pane to see what files are attached.

The appearance of the font for each file name also indicates whether the file is not checked out, is checked out to you, or is checked out to another user. A normal black file name indicates that the file is not checked out. A bold blue file name signifies that the file is checked out to you. A bold gray file name denotes that the file is checked out to another user. See Figure 6.

File Name	V...	Created By	Checked In
2013-010-007-InletSG.iam	2	rdanitz	
2013-010-007InletSGDPlateFront.ipt	2	rdanitz	
2013-010-007InletSGDPlateSide1.ipt	2	rdanitz	
AnchorBolt_.625 x 8.5_20980A.ipt	3	cwhetten	6/11/2010 6:01 P
CableWinch1_20980A.ipt	2	cwhetten	3/10/2010 4:23 P
CableWinch1_Short_20980A.ipt	1	cwhetten	3/10/2010 4:23 P
CableWinch2_20980A.ipt	1	cwhetten	2/23/2010 6:01 P
ConcreteFloor_NBW_20980A.ipt	**7**	**cwhetten**	
ConcretePedestal_NBW_20980A.ipt	**7**	**cwhetten**	

Figure 6 - File Name Font Appearance

For the case of a file checked out to another user, the Created By column indicates which user has checked out that file.

The status of a file may not automatically refresh. This is especially true if the user checks files in or out or otherwise makes changes to any file from outside the vault client application. For example, if the user opens a file through Inventor, checks the file out, and then makes changes to the file, a quick look at the file status in the vault client application may not indicate any of this. The view may need to be refreshed before the file status icons will reflect these conditions.

3.8 Working with Files in the Vault

Right-clicking a file in the vault client application brings up a context menu as seen in Figure 7.

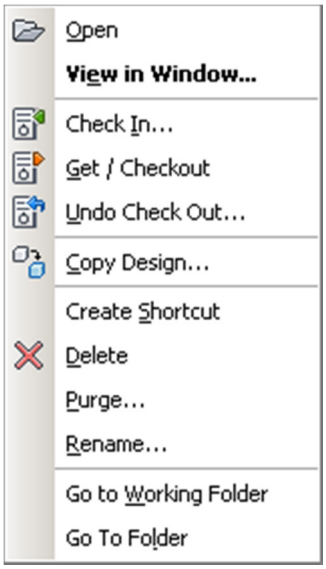

Figure 7 – The Vault File Context Menu

IMPORTANT!
Be cautious when working in the vault. **All changes made in the vault client application cannot be undone.**

The following table gives a description of each function in the file context menu.

Function	**Description**
Open	Clicking Open will open the file in its native application. If that application is not currently running, the vault client will attempt to launch it.
View in Window…	This command opens the file in a viewing application designed for that file type. AutoCAD files are opened in the Autodesk DWG Viewer. Inventor files are opened in the Autodesk Inventor View application. All other files are displayed in the viewer associated with that file type. For each file type, the appropriate viewing application must be installed. Files viewed in this way are downloaded to the local TEMP directory and do not replace the files in the working directory.