GRAITEC MODELING THE FUTURE

What's New

in PowerPack for Vault 2024

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1 GENERAL INFORMATION ABOUT VERSION 2024

The 2024 version of the **PowerPack for Vault** comes with new features but also improvements on the existing ones:

- Vault Emailing Tool
- Improvements for ShowVaultConfig
- Improvements for Configure jobs - General Tab - Set loaded file path as default via check box.
- Help documentation.

The users of Autodesk Vault versions 2023 and 2024 will benefit from these novelties from the **PowerPack for Vault 2024** because this last one can be installed on both versions of the platform.

1.1 COMPLIANCY WITH AUTODESK VAULT 2024

The **PowerPack for Vault 2024** is compliant with Autodesk Vault 2023 and 2024 versions.

The PowerPack for Vault 2024 can be installed using the Setup PowerPack for Vault 2024. The setup will install version 2024 of the PowerPack on Vault 2023 and 2024, if these are installed previously.

1.2 INSTALLATION

Regarding the installation of the PowerPack version 2024, please follow the following guidance.

Note: *The version 2023 of the PowerPack for Vault does not need to be uninstalled.*

1. Download the **PowerPack for Vault 2024** setup from the Graitec Advantage account or Graitec website.

2. Once downloaded, double-click and open **PowerPack for Vault 2024** setup and click on the **Install** button.

PowerPack for Vault 2024 installer

Before the installation starts, the End User License Agreement needs to be accepted to procced further.

Note: *If Vault 2022, 2023 and 2024 versions are installed on the same computer, and version 2023 of the PowerPack for Vault is installed as well, the 2024 setup will automatically update the version of the PowerPack for 2023 platform. Therefore, for Vault 2022, the 2023 PowerPack version will remain installed, and for Vault 2023 and 2024, the version 2024 of the PowerPack will be installed.*

2 New Commands

For version 2024 we have focused to implement a new functionality that will help Vault users email another user or a group on state changes in the Vault, having the possibility to configure the email message and add hyperlink to drawing file.

Another focus was to create the HELP documentation for the PowerPack for Vault so the users can find directly in the application how the commands are working or how to configure them.

2.1 Vault Emailing Tool Overview

The Vault Email Tool is an addon to Vault that can send out emails or add property information to files during a lifecycle change. It is fully customisable by the Vault admin so that when a user changes a lifecycle the right property information can be saved, and the people who need to be alerted of this change can be informed by email.

Emails can be sent out to individuals or to whole groups. And Properties can be updated with either the Name of who changed the file or the current date/time.

As well as that, this tool can also change the revision lifecycle of a file when a lifecycle changes. Going from Alpha to numerical, or to any other revision scheme.

The configuration of the tool is detailed in a separate chapter that covers what can be configured in greater detail.

Here is an outline overview of what configuration can be done:

- The tool can be configured to send out emails to different people. Either by the user selected or something specific by the configuration.
- The tool can add property information during a lifecycle state change.
- The tool can change the revision scheme or bump the existing revision.
- And along with this is several condition checks such as:
    - The tool only activates for certain file extensions.
    - The tool only activates if the revision is a certain revision.
    - The tool only activates if certain properties match certain values.

2.2 Vault Emailing Tool – How to use

2.2.1 Sending emails

When the Tool has been set up to send out an email when a lifecycle state changes. There are a few different things you will see when changing the lifecycle.

If the configuration is already setup to email either a specific person or a specific group, you won't see any change. The lifecycle can be changed normally.

However, if the configuration does not require a specific person, when changing the life cycle, you will be presents with a picklist option box. (Image Here)

Here you will either be Prompted to:

- Select a user to email.
- Select a group to email.
- Select multiple users to email if changing more than one file.

The selection size will be limited by what has already been configured.

Also there might be additional dialog to add custom notes to the email being sent out. Once the email is sent the recipient or recipients will receive an email like the one below.

This email will inform them of the file that has changed life cycle. As well as who changed the lifecycle. All custom notes will be added as well as any notes setup in configuration.

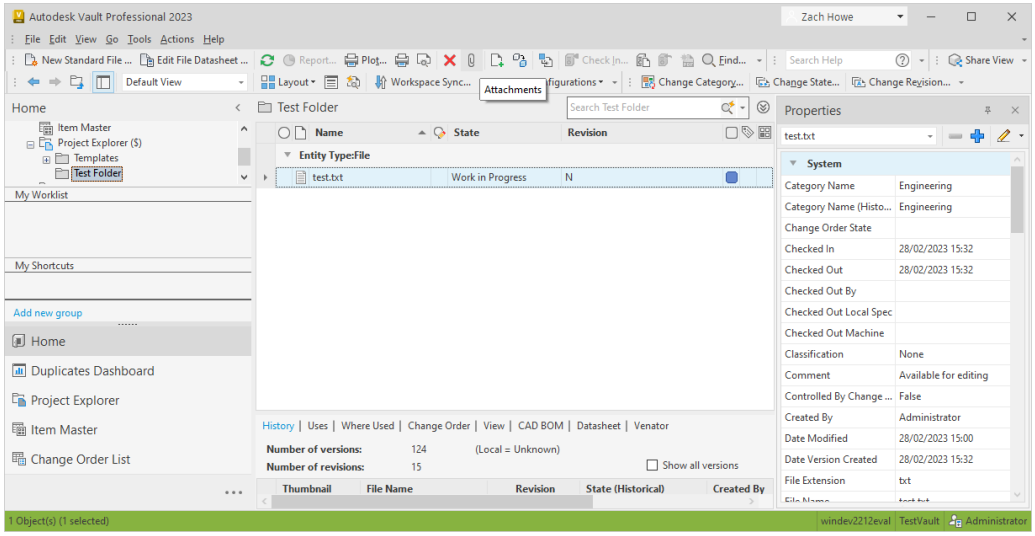
Status has changed from Work In Progress to Engineering Check

Staff: Zach.Howe@graitec.co.uk
Files:

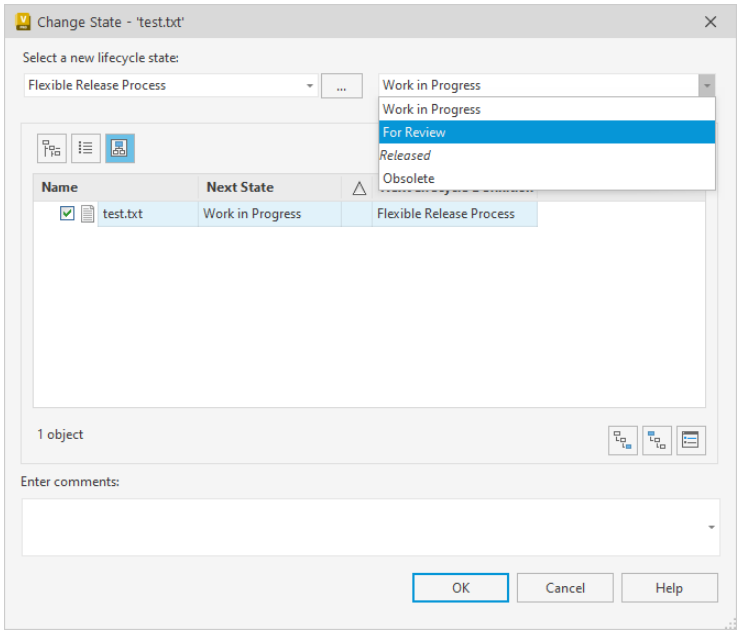
M080041.idw

2.2.2 Email Walkthrough

1. Select a file to change lifecycle.



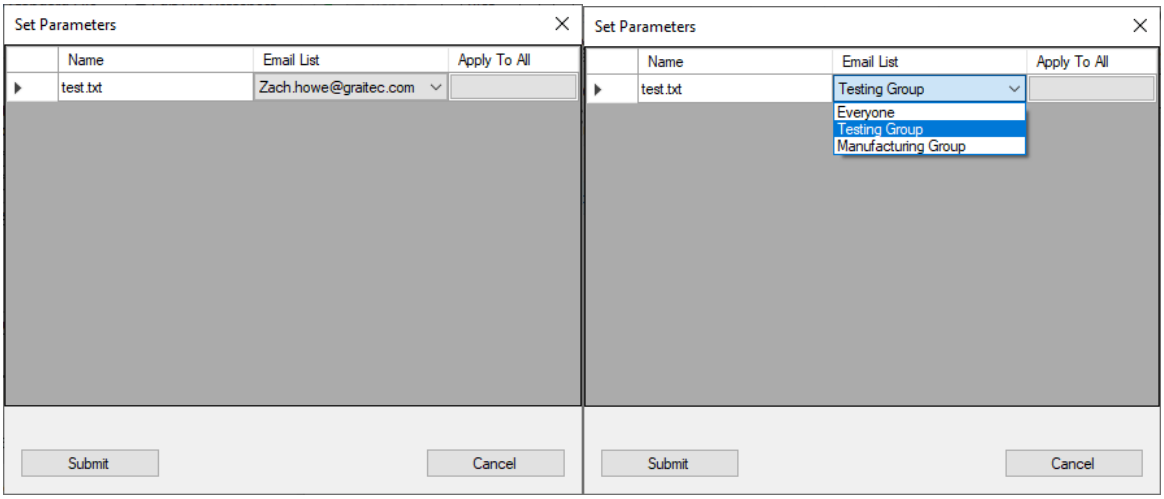
2. Change Lifecycle



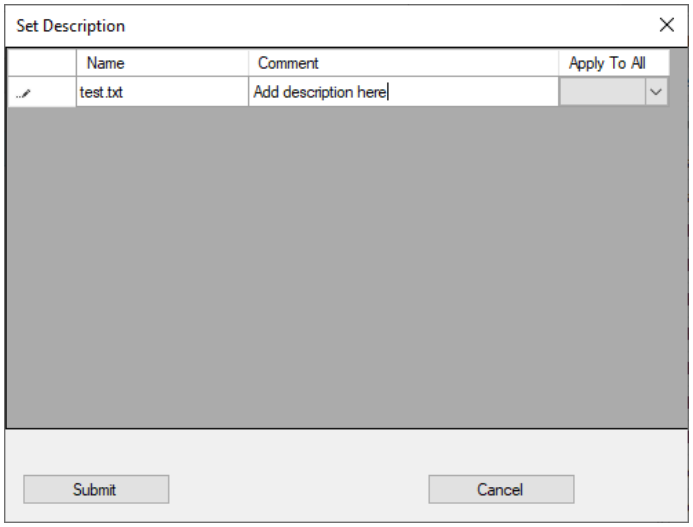
3. Life cycle process will start. If an email option is configured, an email dialog will be shown.

   From here for each file being changed a different email address can be selected. And that person will then be emailed.

   The Options all depend on the configuration. If a group email is selected then a group option will be present here.



4. If a free entery descriptions is enabled. Then your be free to add your own text to the out going email. This works in the same way as above when different descriptions can be added Per file.



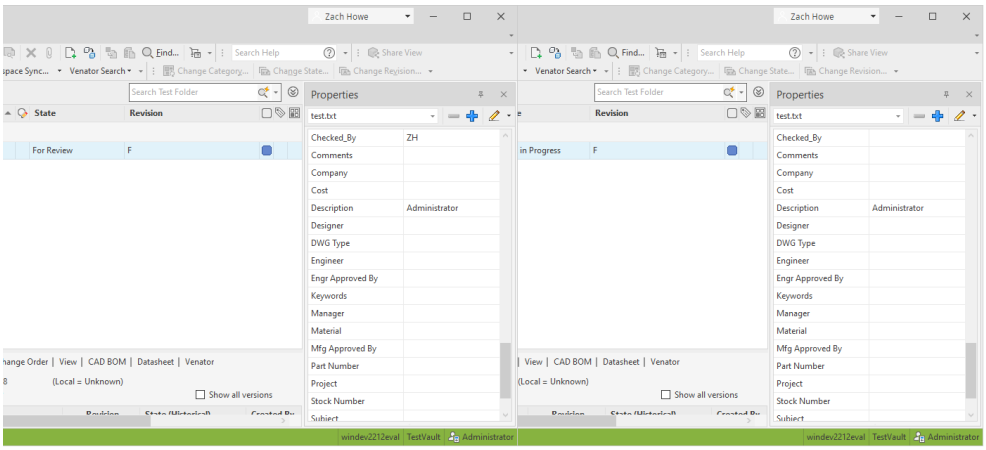
5. Afterward an email will be sent and the lifecycle will be changed.

2.2.3 Changes in Properties

When the tool has been setup to update variables, when changing lifecycle states the tool will automatically add or remove the contents of properties. When using this function, just change the lifecycle as normal. After the lifecycle has changed the variable will be now added or removed.

For example: If you are changing the life cycle from “For Checking” to “For Review” and that state has Property set to be saved. The Tool can add your name to the Property “Checked By”.

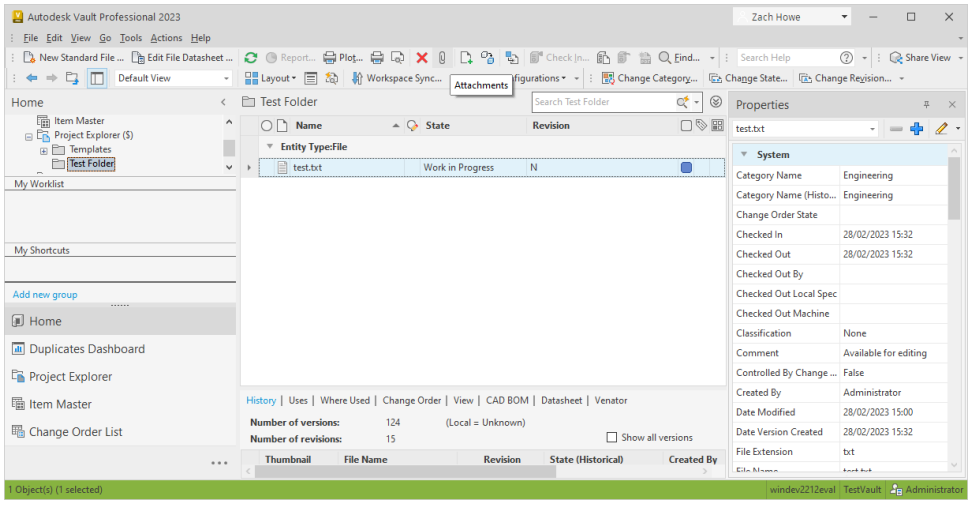
And if an Error has been found afterward and the file is moved back to “For Checking”, the property “Checked By” can be wiped clean.



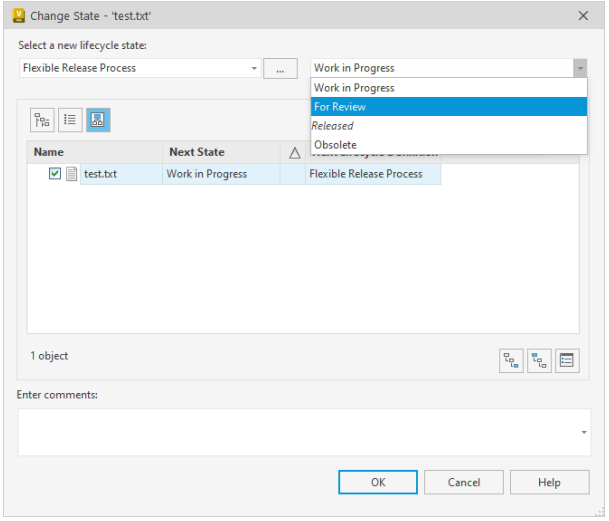
Most properties can be added automatically, however if a List property is used then when changing life cycle, you will be prompted to select an option for the List Property.

2.2.4 Property Walkthrough

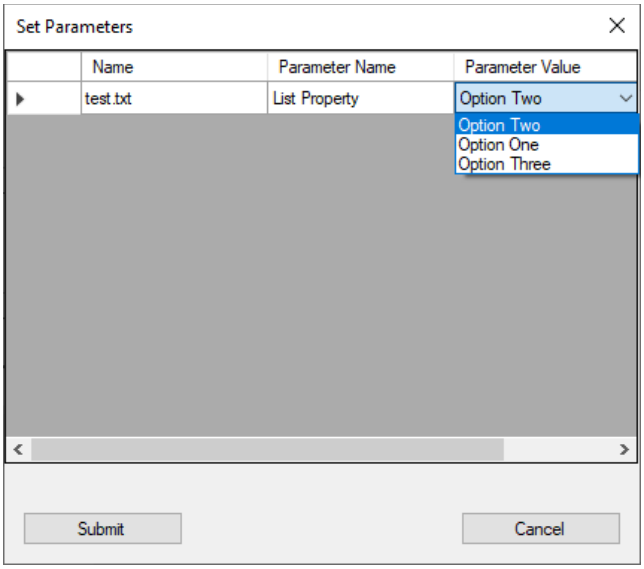
1. Select a file to change lifecycle.



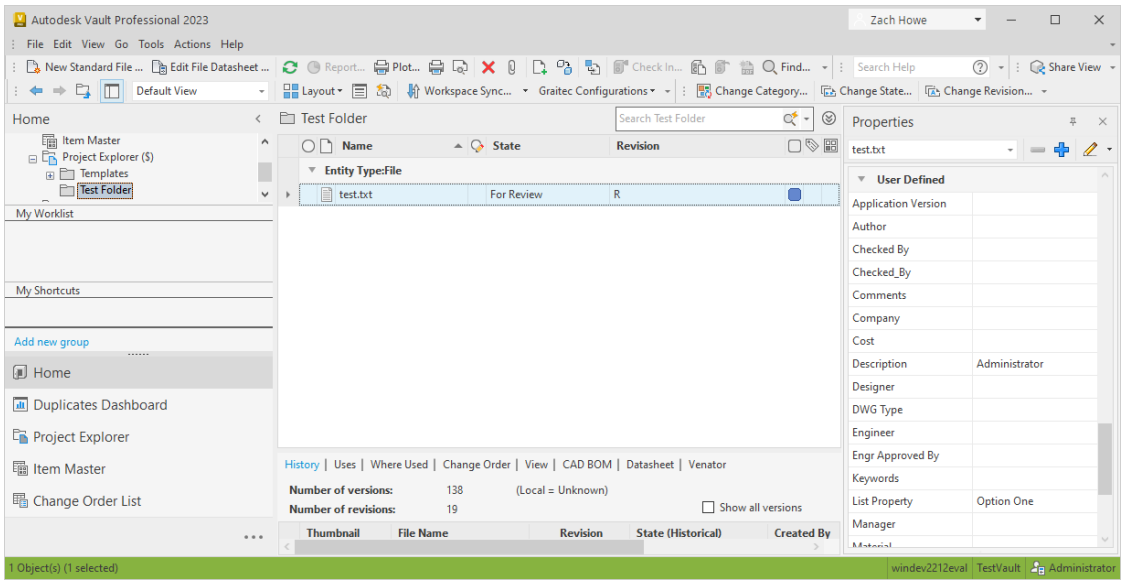
2. Change Lifecycle



3. If a display list property is being changed you will be asked to select a property.



4. Afterward, the lifecycle will be changed and the property will be updated.

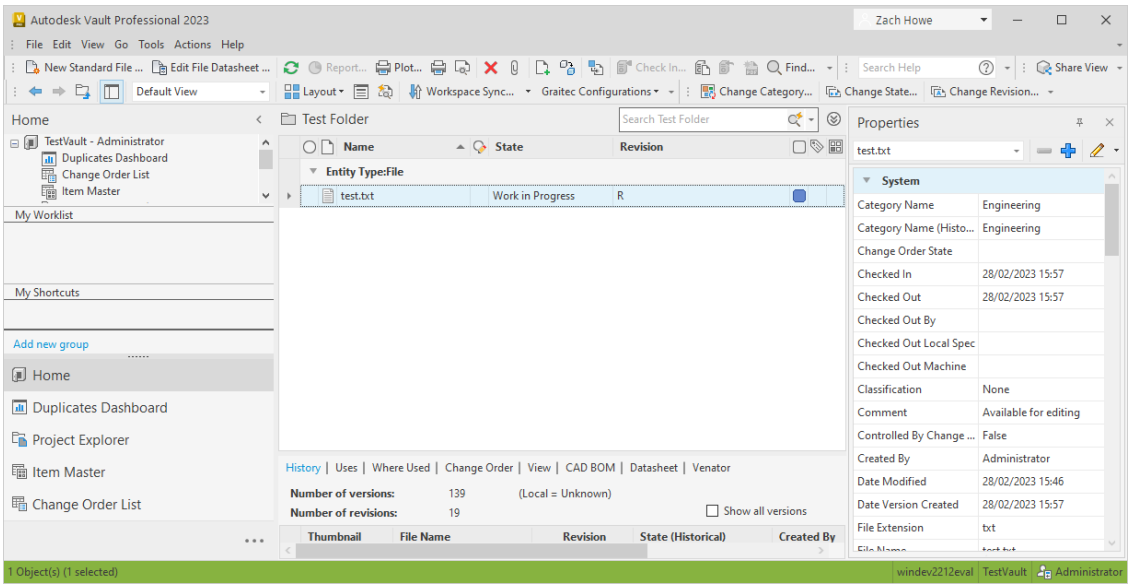


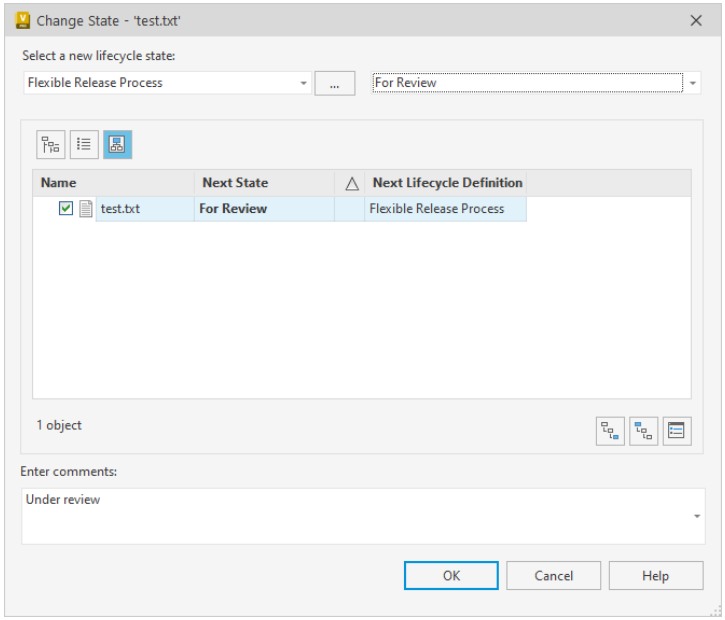
5. Property That can be saved are
   Name / Initials / Email / Date / Email Reciver / User Email address / and Wipe a property Clean.

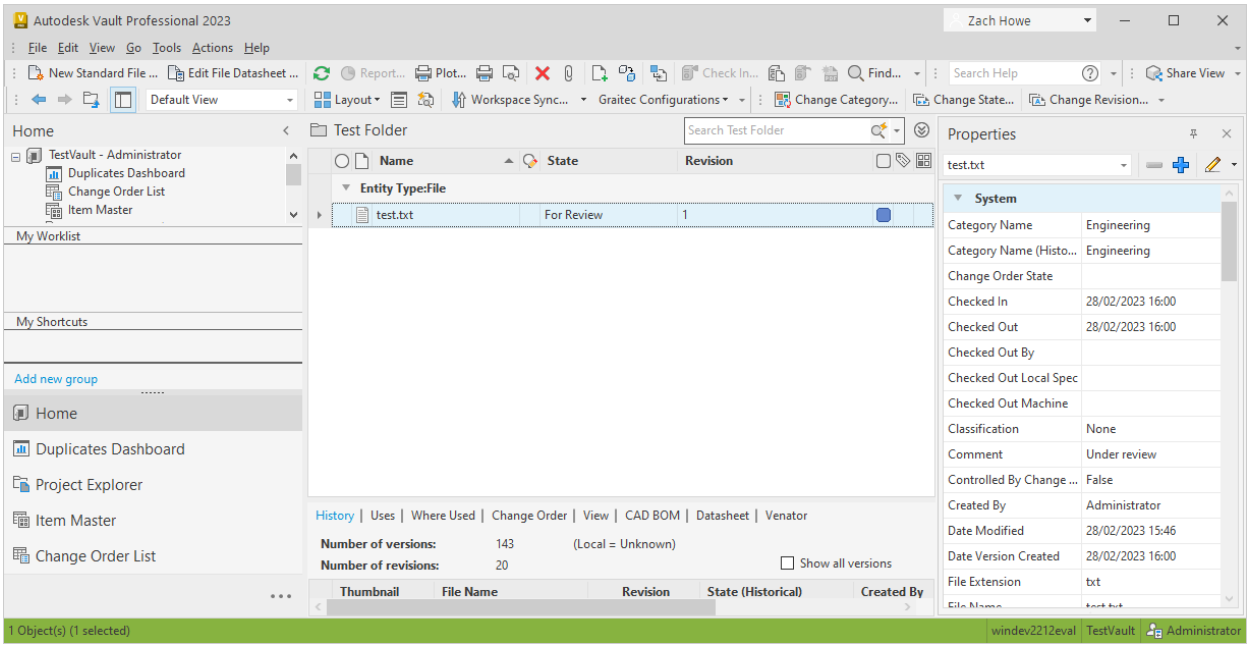
2.2.5 Changing Revision & Walkthrough

Lastly this tool can either bump the revision of a file or change the revision scheme completely. This can be set so that when a certain lifecycle change happens, the tool can activate and change the files revision scheme from one scheme to another. Which scheme and when the change happens completely depends on the configuration of the tool.

Changing revision scheme is as simple as changing the lifecycle state. No additional input is needed from the user.


Autodesk Vault Professional 2023
Zach Howe
File Edit View Go Tools Actions Help
Home
Test Folder
TestVault - Administrator
Duplicates Dashboard
Change Order List
Item Master
My Worklist
My Shortcuts
Add new group
Home
Duplicates Dashboard
Project Explorer
Item Master
Change Order List
Name
State
Revision
Entity Type:File
test.txt
Work in Progress
R
Properties
System
Category Name
Engineering
Change Order State
Checked In
28/02/2023 15:57
Checked Out
28/02/2023 15:57
Checked Out By
Checked Out Local Spec
Checked Out Machine
Classification
None
Comment
Available for editing
Controlled By Change ...
False
Created By
Administrator
Date Modified
28/02/2023 15:46
Date Version Created
28/02/2023 15:57
File Extension
txt
History | Uses | Where Used | Change Order | View | CAD BOM | Datasheet | Venator
Number of versions: 139 (Local = Unknown)
Number of revisions: 19
Show all versions
Thumbnail
File Name
Revision
State (Historical)
Created By
1 Object(s) (1 selected)
windev2212eval
TestVault
Administrator


Change State - 'test.txt'
Select a new lifecycle state:
Flexible Release Process
For Review
Name
Next State
Next Lifecycle Definition
test.txt
For Review
Flexible Release Process
1 object
Enter comments:
Under review
OK
Cancel
Help

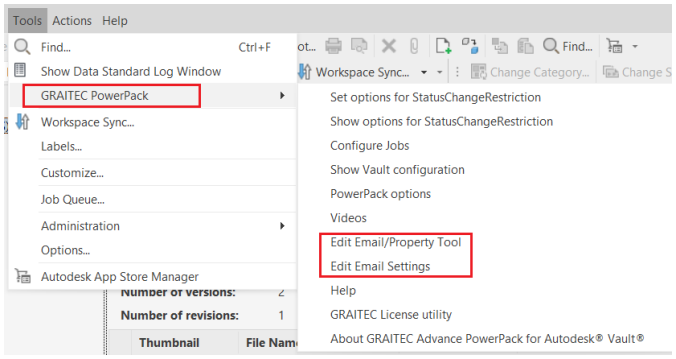

Autodesk Vault Professional 2023
Zach Howe
File Edit View Go Tools Actions Help
Home
Test Folder
TestVault - Administrator
Duplicates Dashboard
Change Order List
Item Master
My Worklist
My Shortcuts
Add new group
Home
Duplicates Dashboard
Project Explorer
Item Master
Change Order List
Name
State
Revision
Entity Type:File
test.txt
For Review
1
Properties
System
Category Name
Engineering
Change Order State
Checked In
28/02/2023 16:00
Checked Out
28/02/2023 16:00
Checked Out By
Checked Out Local Spec
Checked Out Machine
Classification
None
Comment
Under review
Controlled By Change ...
False
Created By
Administrator
Date Modified
28/02/2023 15:46
Date Version Created
28/02/2023 16:00
File Extension
txt
History | Uses | Where Used | Change Order | View | CAD BOM | Datasheet | Venator
Number of versions: 143 (Local = Unknown)
Number of revisions: 20
Show all versions
Thumbnail
File Name
Revision
State (Historical)
Created By
1 Object(s) (1 selected)
windev2212eval
TestVault
Administrator

2.3 VAULT EMAILING TOOL – HOW TO CONFIGURE

This section is about how the emailing tool can be customized by an Admin of Vault, as well as what options are available.

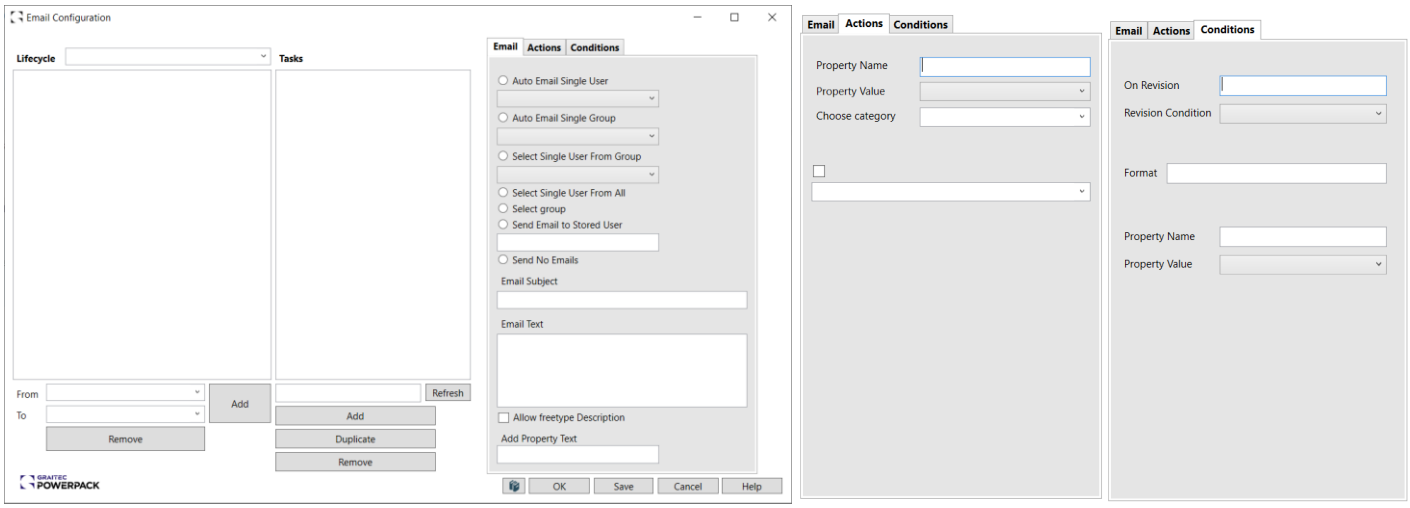
Once Autodesk Vault has loaded go the “Tools” Tab. Under the “Tools” Tab you will find a “Graitec Configurations” Option.

“Edit Email/Property Tool” will open the window to customise the Tool.



Vault Emailing Tool ribbon

The configurator is only used by admins to setup what actions will be taken when a lifecycle change happens.



Email Configuration dialog

The main purpose of the configurator is to allow the admin to configure what actions take place on what lifecycle changes.

It is made up of 3 sections: Lifecycle trigger, tasks, and actions.

Lifecycle triggers define which triggers the addon will be looking for. A trigger can have many Tasks.

And a Task is normally used for a single action.

Lifecycle: Here user can add which lifecycles changes you wish the tool to activate on.

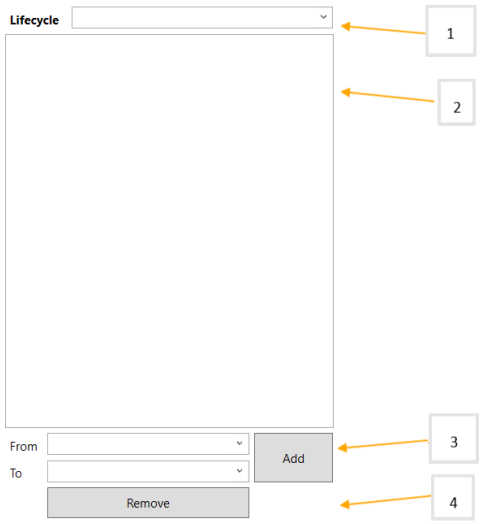
Tasks: List the tasks that will be active on the lifecycle change.

Email: Lets an email be sent out on lifecycle change

Actions: lets property values be saved and the revision schemes be changed

Conditions: The conditions the file needs to be in for the Task to active and the restrictions to stop certain users activating the Task.

2.3.1 Setting a Lifecycle trigger



Lifecycle Area

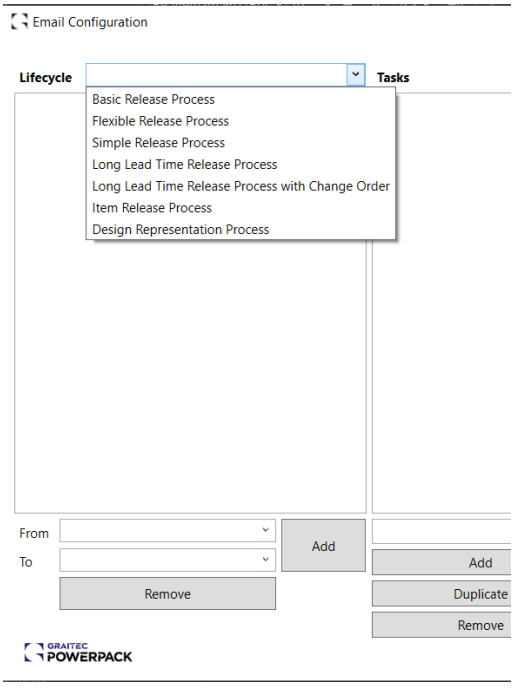
The First step when opening the configuration is to look at the lifecycle section.

Here you need to enter which lifecycles you wish the tool to active.

1. Here you can select the lifecycle category you wish to use.
2. Here lifecycles options you have setup for that category will display.
3. Here you can add new lifecycles.
4. Here you can remove old lifecycles.

2.3.2 Setting up Lifecycle example

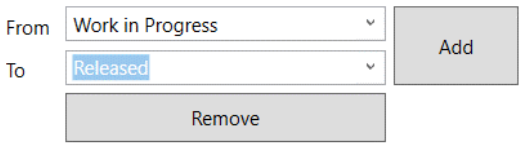
In the lifecycle section a category can be selected to work from. In this diagram "Basic release process" has been selected. But on your system, it will be populated with your own vault configuration. Select the category you wish to work from.



Lifecycle categories

Next the two drop down boxes at the bottom of the panel will be populated with all the lifecycle stages for this category. In the "From" selection choose the lifecycle your file will be in, and in the "To" selection choose the lifecycle your file will be changing to.

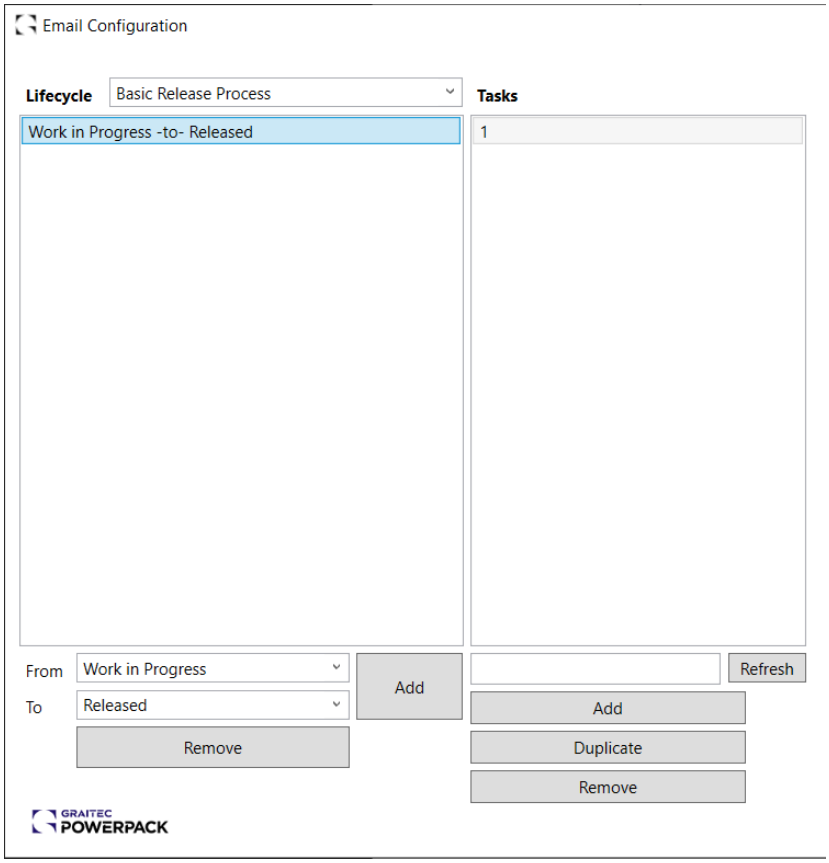
Once done hit the "Add" button. Now your selection will have been added to your List above. From here you can choose the Lifecycle trigger you wish to configure.



Lifecycle changes

Next your lifecycle should be added to the Lifecycle List.

This will enable you to use the Task menu.



Tasks menu

If you wish to remove a Lifecycle trigger, click on the list option, and hit the **Remove** button at the bottom.

2.3.3 Tasks

Once a Lifecycle trigger is created, the default task panel will be populated. The default task created is called "1" for Task 1, but this can be changed.

In the textbox below enter a name for the task and then hit the refresh button. This will rename your current selected task to the name selected.

If you wish to add a new task, the "Add" button will add a new Task to the List.

If you wish to remove an existing task, the "Remove" button will remove your current selected task.

And the "Duplicate" button will make a new task with the settings of the task which you currently have selected.

1. List of Tasks
2. Rename the existing task.
3. Adds new Tasks.
4. Copy existing selected Task.
5. Remove existing selected Task.

Once the lifecycle is chosen the panel to mostly used to create new tasks.

Below will be how tasks can be configured.

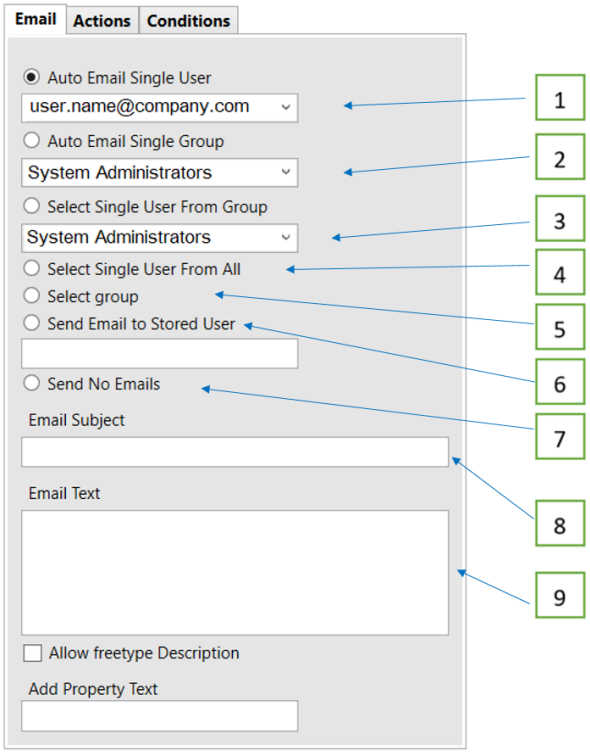
2.3.4 Tasks Email Options

Once a task has been created then the actions this task will do can be set.

On the far right is the Email/Action/Conditions segment, where you can set the task to either send out emails or save certain property information.

There is also a Conditions tab which is used to make sure the current Task will not trigger unless certain conditions are met.

Once finished, the settings can be saved by the "Save" Button.



Email Configuration Menu

Below is a list of all the actions available.

- **Emails**
  This section is about what email options are available when the lifecycle trigger takes place.

  - **Auto Email Single User**

  When triggered, this action will send on email to whomever is listed in the configuration.

  - **Auto Email Single Group**

  When triggered, this action will send an email to all users of a group. The Group is whichever group is configured for this option.

  - **Select Single User From Group**

  When triggered, this action allows the user who changes the lifecycle to select a single user to be emailed from within a single group. The group will be determined by which ever group is configured for this option.

  - **Select Single User From All**

  When triggered, this action allows the user who changes the lifecycle to select a single user to be emailed from all available users within the Vault.

  - **Select Group**

  When triggered, this action allows the user who changes the lifecycle to select a Group. All users of this Group will then be emailed.

- **Send Email to Stored User**

When triggered, this action will email a single user from a property. It will read a property for an email address, and then email the user of that email address. Which property is determined by the configuration of this option.

- **Send No Emails**

The default option, no emails are sent.

- **Email Subject**

Subject of the email to be sent.

- **Email Text**

A body of text will be sent along with the email. (By Default, Emails already include a list of which files have had their lifecycle changed)

- **Allow free type Description**

Allows the user who changed the lifecycle to enter a description to be sent in the email.

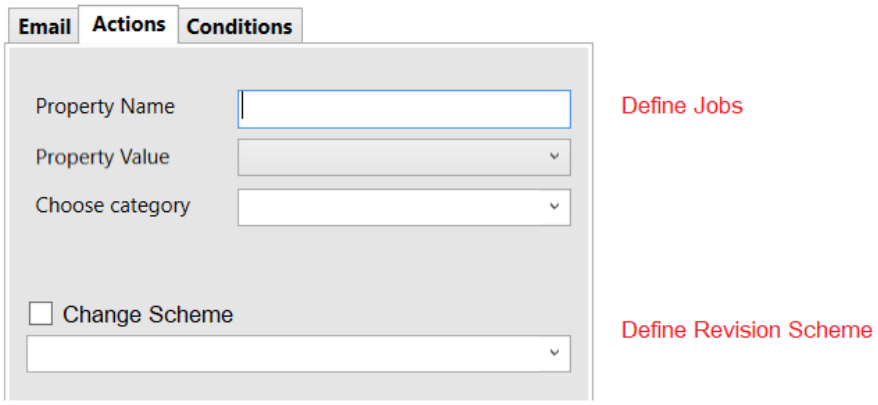
- **Add Property Text**

This action will read a single property on the file that has changed lifecycles, and add the text of that property to the outgoing email. Which property is determined by the configuration of this option.

2.3.5 Task Actions

In the Actions tab the jobs and revision are defined for each defined task.

This Section is about what Property Actions can take place when a lifecycle change happens. All the below require a property name to be entered into the configuration for the action to take place.

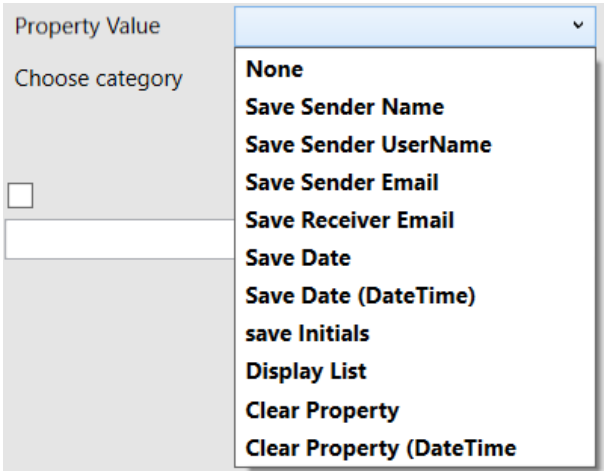


Actions Tab

2.3.5.1 Task Property

The property Value lets you choose which job you wish to use.

Most require the property entered in "Property Name" to save the task information too. Also, a category can be set as well.



Property Values

- **None**

This is the Default Action. Nothing will happen with this option.

- **Save Sender Name**

The User who has changed this lifecycle, will have their Name saved to a property.

This can be useful for saving who has approved or checked a document and was the user who changed the lifecycle of the file on to its next stage.

Which Property is determined by what is configured for this option.

- **Save Sender Username**

The User who has changed this lifecycle, will have their Username saved to a property.

This can be useful for saving who has approved or checked a document and was the user who changed the lifecycle of the file on to its next stage.

Which Property is determined by what is configured for this option.

- **Save Sender Email**

The User who has changed this lifecycle, will have their Email address saved to a property.

This can be useful, as once a file has been approved; the original user can be emailed to be kept updated on the progress of the file.

Which Property is determined by what is configured for this option.

- **Save Receiver Email**

When a single user is emailed, their email address can be stored as a property.

This can be useful, as it allows either the same user to be emailed again in the future without dialogs, or can keep track of who was emailed about the lifecycle change.

Which Property is determined by what is configured for this option.

- **Save Date**

When a lifecycle change happens, this option will write what time the lifecycle change happens to a property of type Text.

Which Property is determined by what is configured for this option.

- **Save Date (DateTime)**

When a lifecycle change happens, this option will write what time the lifecycle change happens to a property of type Date.

Which Property is determined by what is configured for this option.

- **Save Initials**

The User who has changed this lifecycle, will have their Initials saved to a property.

This can be useful for saving who has approved or checked a document and was the user who changed the lifecycle of the file on to its next stage.

Which Property is determined by what is configured for this option.

- **Display List**

This option is when a List Property is used. When a lifecycle change happens, the user will be prompted with a dialog.

This dialog will contain the List options for the property, and the user will be able to select a display option to be saved to the property.

Which Property is determined by what is configured for this option.

- **Clean Property**

Will clear a property of type Text, and delete what text is already in the property.

Which Property is determined by what is configured for this option.

- **Clean Property (DateTime)**

Will clear a property of type Date, and delete what text is already in the property.

Which Property is determined by what is configured for this option.

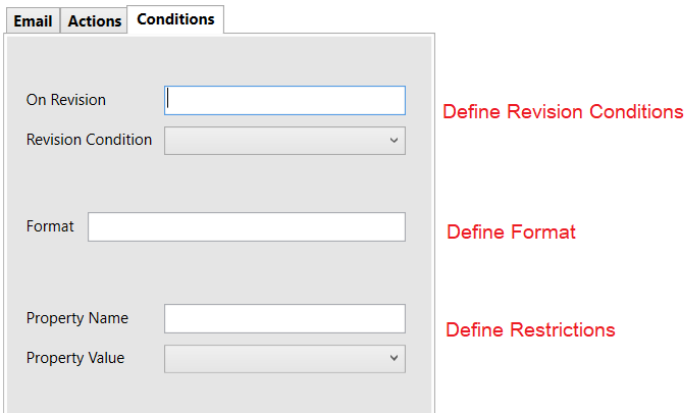
Note: If you wish to send an email back to the original user. You need to save their email address to a property. And when the next lifecycle happens, you can read the property with the email address and email them back.

2.3.5.2 Task Scheme

The **Change Scheme** option is for when during a lifecycle trigger, the Scheme of the file needs to be changed. If the change is possible from its current state, it will be changed into the scheme selected here. If the change is not possible, the add-in will not be able to make the change.

2.3.6 Conditions/ Format / Restrictions

The conditions section is a list of rules that must be true for the Email section and the Action section to take place. Here you can allow the configured actions to only happen in certain instances.



Conditions definition

2.3.6.1 Revision

- **On revision**

This option will mean the Tool will only act if the Revision is at a certain stage.

- **None**

There is no condition check on revision.

- **Equals**

The revision number of the file must match the revision number configured here. If it does not, the tool will not activate.

- **Greater than or equals**

The revision number of the file must either be equal to or greater than the revision number configured here. If it does not, the tool will not activate.

- **Less than or equals**

The revision number of the file must either be equal to or less than the revision number configured here. If it does not, the tool will not activate.

- **Greater than**

The revision number of the file must be greater than the revision number configured here. If it does not, the tool will not activate.

- **Less than**

The revision number of the file must be less than the revision number configured here. If it does not, the tool will not activate.

- **Alpha**

The revision number of the file must be Alpha. No certain Alpha option needs to be configured. This Action will only check to see if the revision is Alpha. If it is not, the tool will not activate.

2.3.6.2 Format

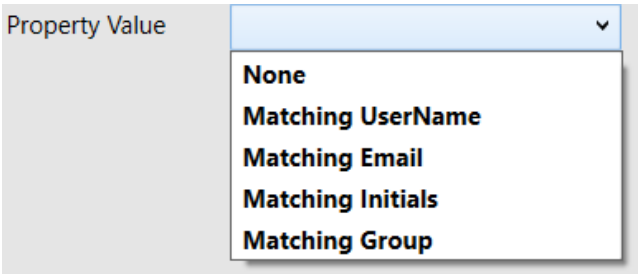
The format is a must needed field for the task to activate.

This checks the extension of the file. If the extension is a match for the formats listed here, the tool will activate. If it is not a match the tool will not activate.

The Task will only be active for Txt Files, Dwg Files, and ipt Files.

2.3.6.3 Property

This option checks to see if certain information is saved in the properties of the file that is changing lifecycle. If that property information is saved the tool will activate. Otherwise, it will not activate.



Restrictions type

- **None**

There is no condition check on Property.

- **Matching Username**

This will check if the user who changes the lifecycle has the same username as a certain property, if they do the tool will activate. Which Property is determined by what is configured for this option.

- **Matching Email**

This will check if the user who changes the lifecycle has the same Email address as a certain property, if they do the tool will activate. Which Property is determined by what is configured for this option.

- **Matching Initials**

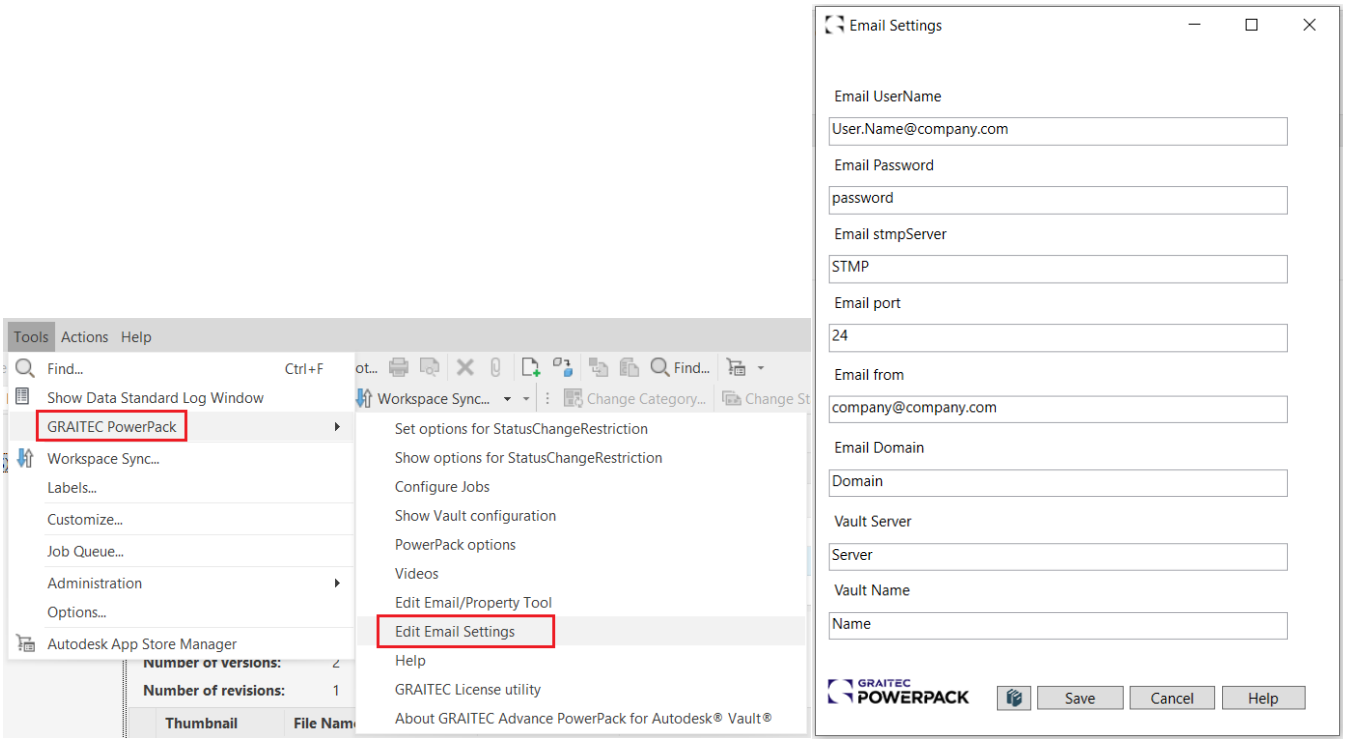
This will check if the user who changes the lifecycle has the same Initials as a certain property, if they do the tool will activate. Which Property is determined by what is configured for this option.

- **Matching Group**

This will check if the user who changes the lifecycle is in the same Group as a certain property, if they do the tool will activate. Which Property is determined by what is configured for this option.

2.3.7 Setting up Emails Settings

For emails to be sent, the Email Settings must be configured and saved.



Email Settings

The following window will need Email Server settings saved. Also, the Vault application must be allowed in any existing firewalls or SMTP server settings to send emails.

Here the standard SMTP setting can be saved and edited. These are:

- Email Username : the User on your network who will be sending the outgoing email form this addon.
- Email Password: the password for the user mentioned above.
- Email SMTP Server: the SMTP server you are using.
- Email Port: The Port you wish the emails to be sent on.
- Email from: who the email will be from.
- Email Domain: the domain of the SMTP server.

After the email settings, there are two more settings that are stored here. These are connected to the Vault Email Tool. For the vault email tool to save property information correctly, both the Vault Server and the Vault Name need to be set here.

Vault server: name of the server the vault is running from.

Vault Name: name of the current Vault.

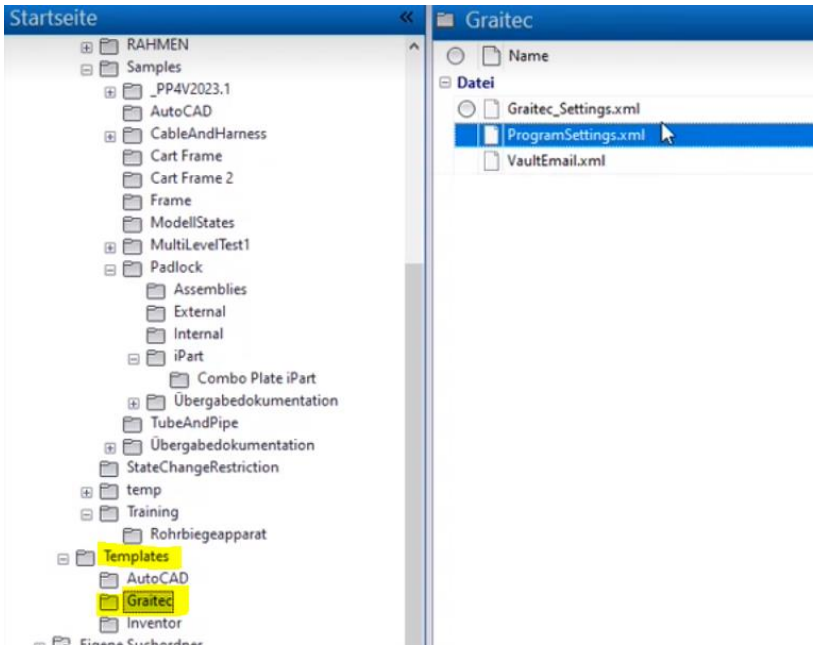
2.3.8 Settings Files

All settings for the Vault Email tool are saved as xml files within the active Vault. They are saved under “$/Templates/Graitec.

That means that once the feature is installed and configured, under “YourVault” >Templates a GRAITEC folder will be created and inside 3 files will be created: Graitec_Settings.xml, ProgramSettings.xml, and VaultEmail.xml.

In these files are encrypted information related to email addresses and all data set via the emailing tool configurator.

Also, we need to mention that once the Admin has saved the lifecycle triggers and tasks, every other user of this package will be able to benefit from the same saved settings.

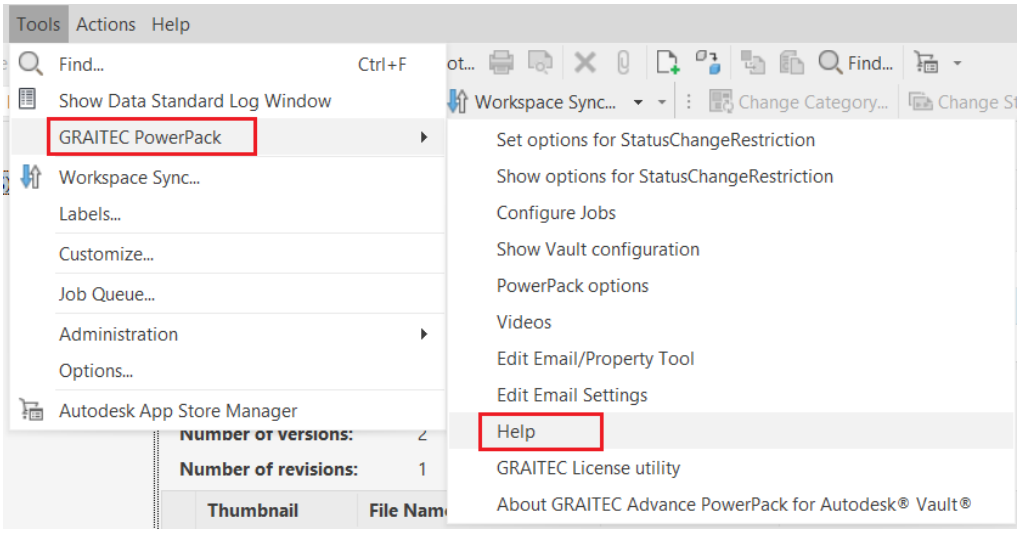


Settings files

2.4 HELP

With the Version 2024 of PowerPack for Vault, we are introducing the HELP for all our commands.

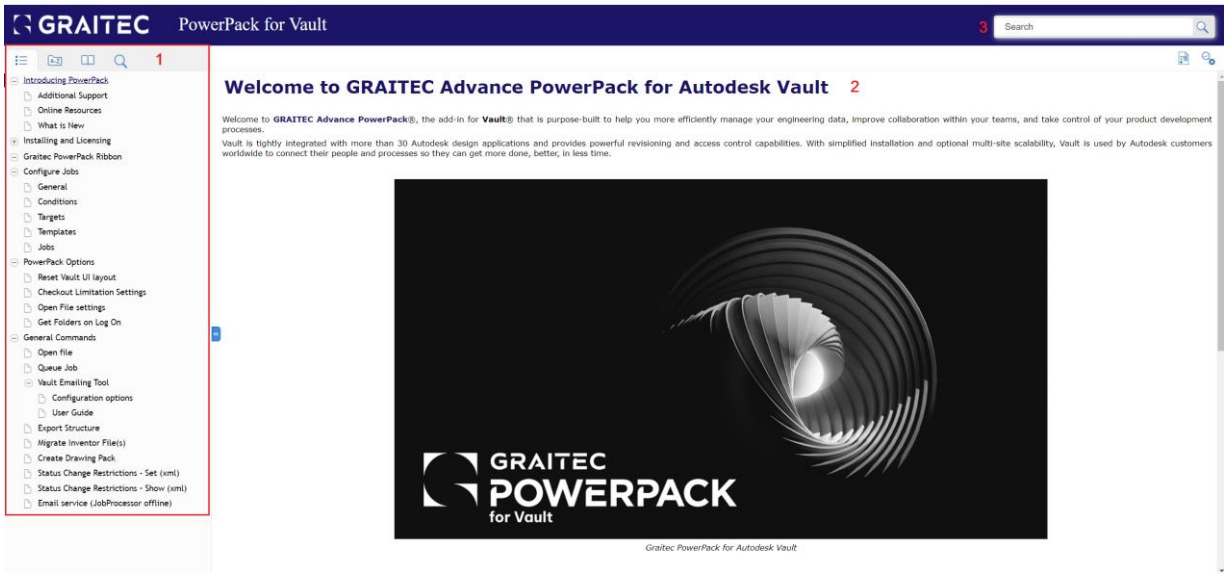
The Help can be accessed from the ribbon of the GRAITEC PowerPack:



PowerPack Help Ribbon

The Help option from the menu is opening our Online Help:

https://www.graitec.com/Help/PowerPack_for_Vault/En/#t=Introducing_PowerPack.htm



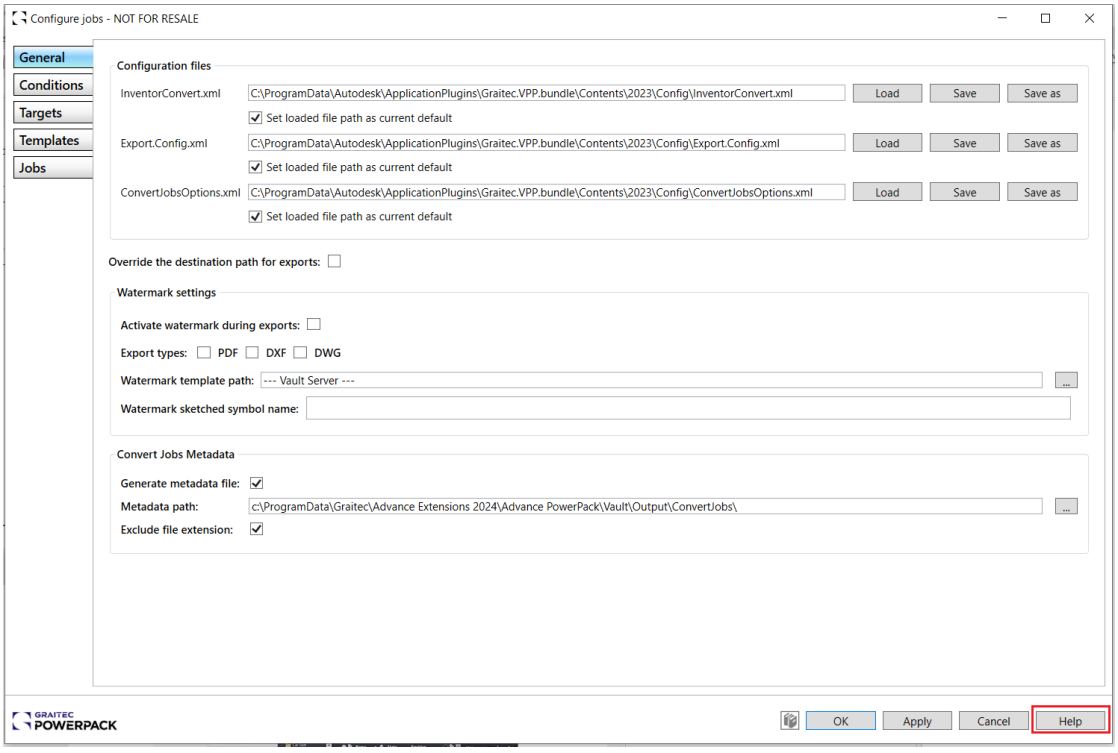
Graitec PowerPack for Autodesk Vault

The Help page has dedicated areas like:

- List of commands/Index/Glossary/Search
- Content window
- Search option

Besides the help option available in the GRAITEC PowerPack ribbon, each command has on the dialog a Help button which is linking the command to the help section dedicated to that command.

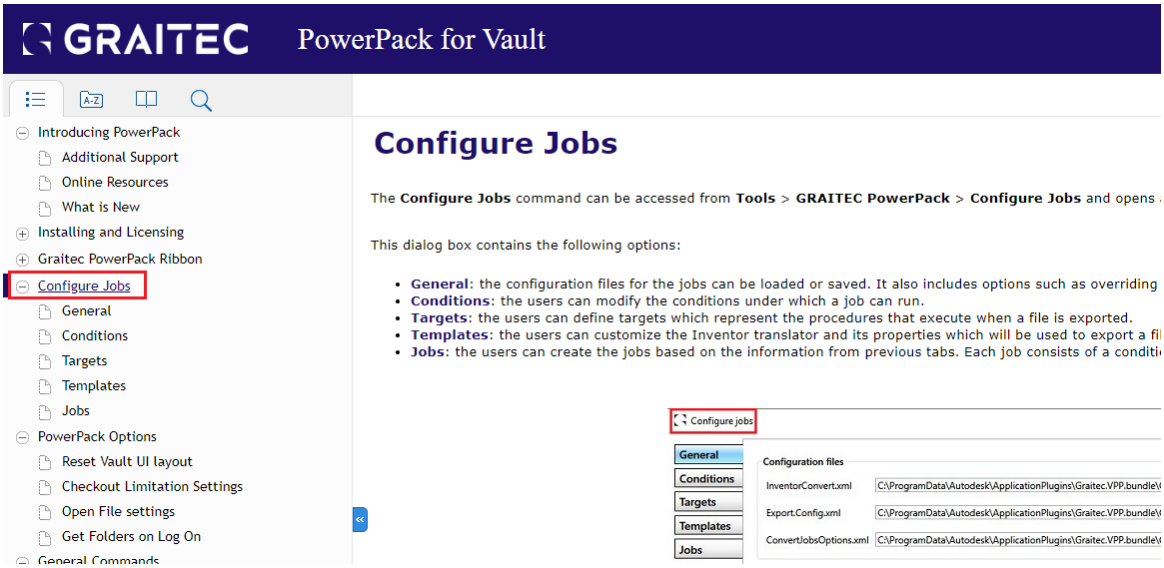
By click the Help button from the dialog of the command, a webpage will be opened in which the dedicated help will be loaded.



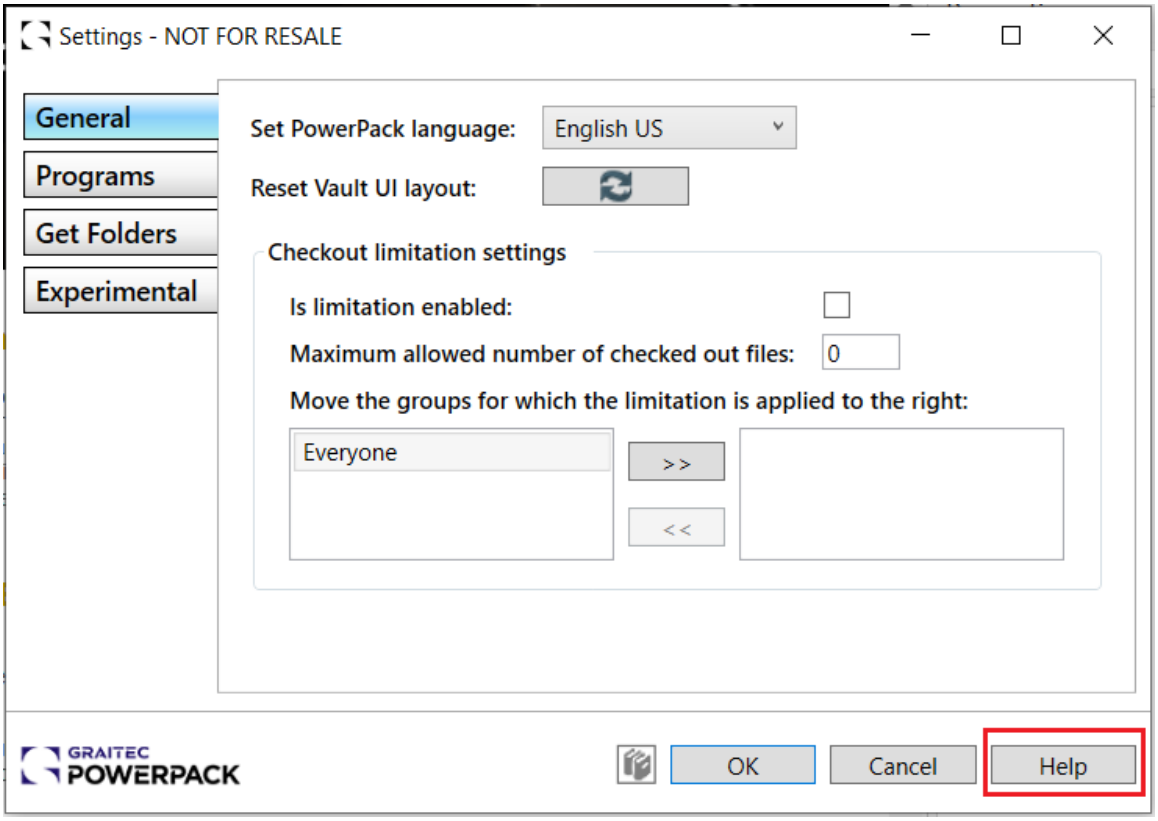
Configure Jobs Help option

Configure Jobs Help webpage:

https://www.graitec.com/Help/PowerPack_for_Vault/En/#t=Configure_Jobs.htm&rhsearch=configure%20jobs



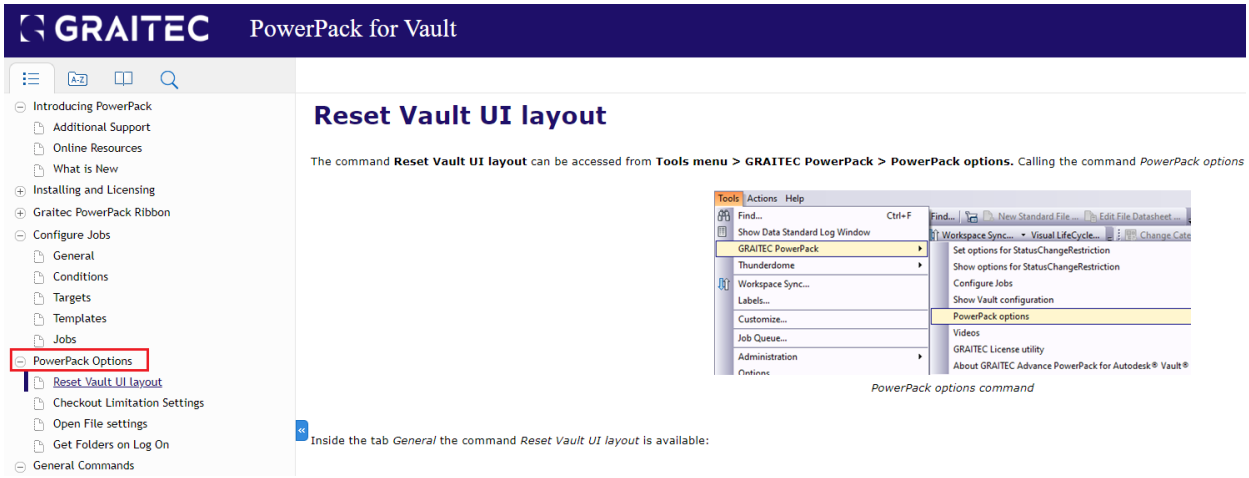
Configure Jobs Help webpage



PowerPack Options Help button

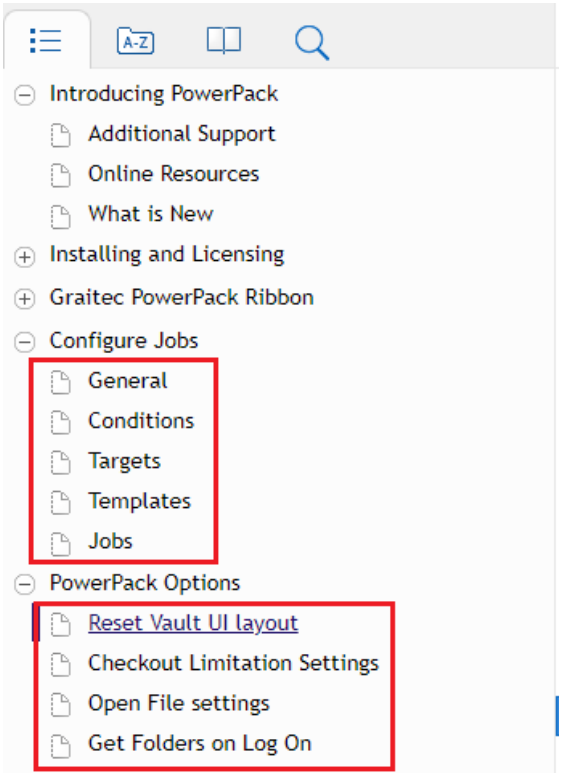
PowerPack Options help webpage

https://www.graitec.com/Help/PowerPack_for_Vault/En/#t=Reset_Vault_UI_layout.htm&rhsearch=configure%20jobs



PowerPack Options help webpage

Under the menu, each general command has a submenu where tabs or functionalities are detailed. Therefore, each tab of the Configure Jobs functionality is detailed under the specific sub-page.



Sub-pages of general commands

3 IMPROVEMENTS

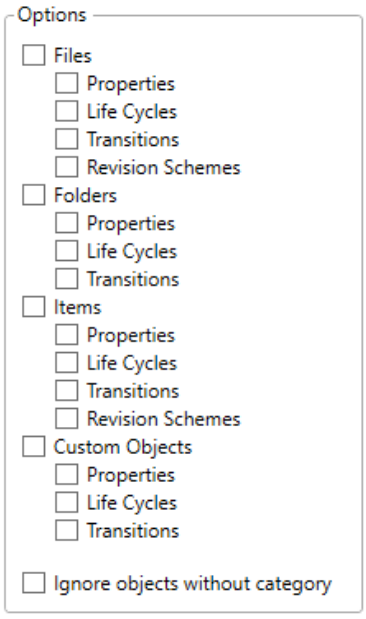
In this version, at the request of our users, we worked to improve the Vault Configuration command and the General Tab from the Configuration Job functionality.

3.1 SHOW VAULT CONFIGURATION IMPROVEMENTS.

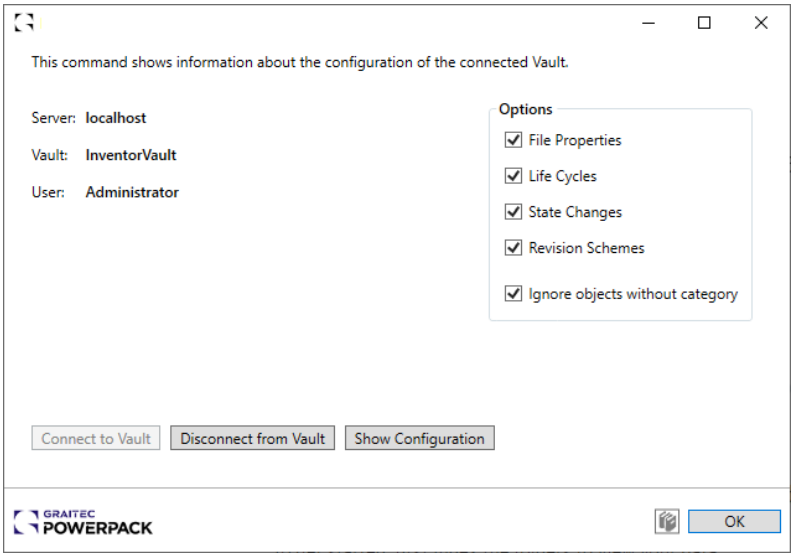
The feature Show Vault Configuration has been created to extract very fast the configuration of the Vault to help administrators and users pass further a configuration of the Vault.

The Vault report has been improved in version 2024 by changing how the configuration is shown in the report. From this version, the report will be created using the Folder configuration and not the ECO one.

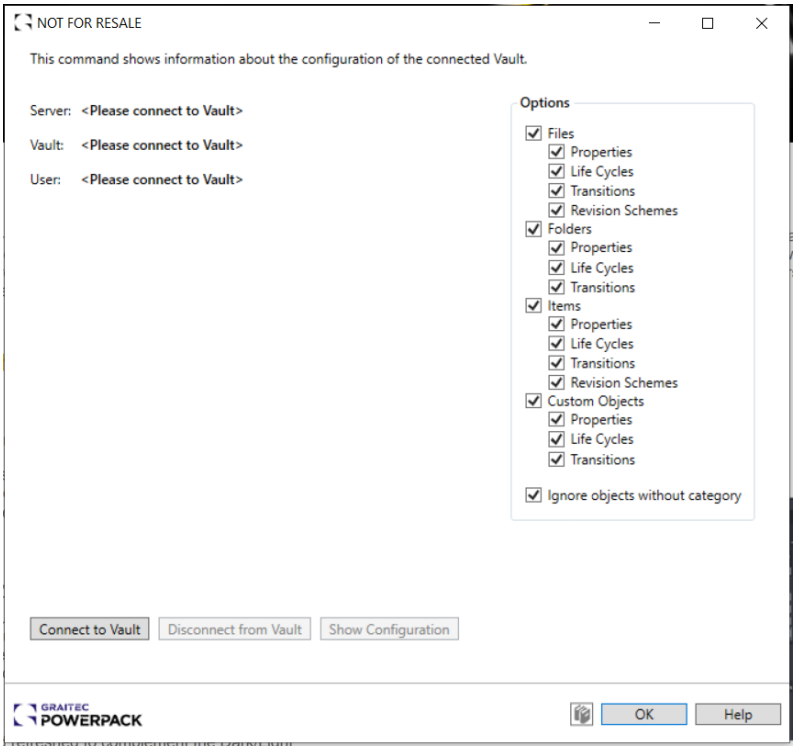
Here below is available the list of objects that need to be reported:



This list replaces the options list on the right side of the current dialog.

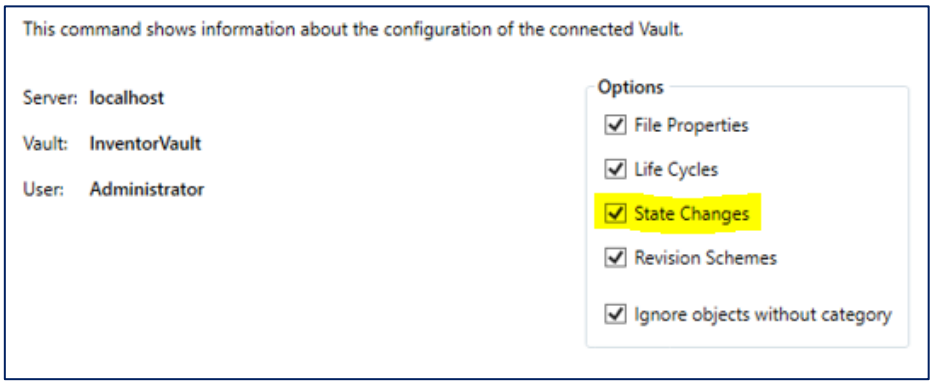


Options - Version 2023.1

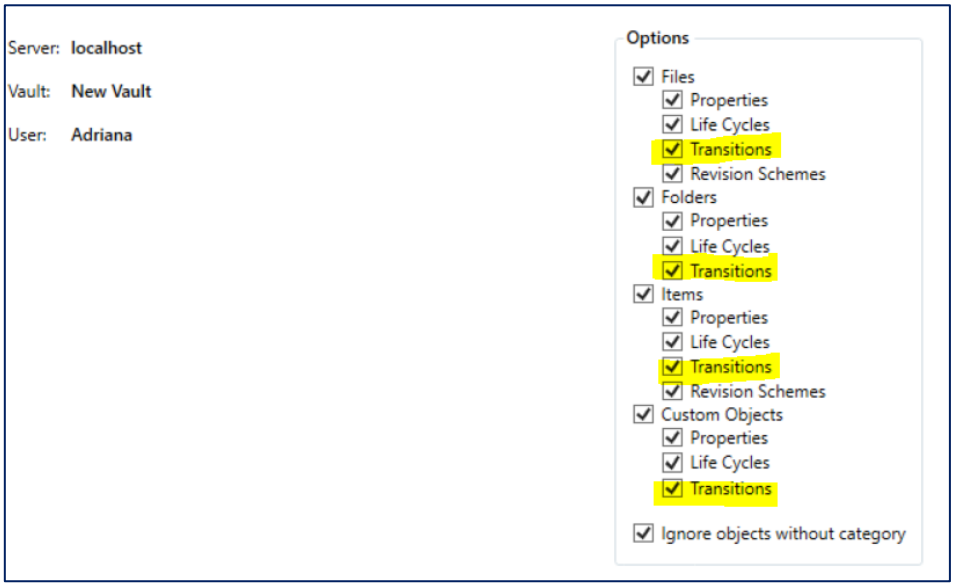


Options - Version 2024

Also, the name of the option "State Changes" has been changed into "Transitions" to be more relevant to the option's purpose.

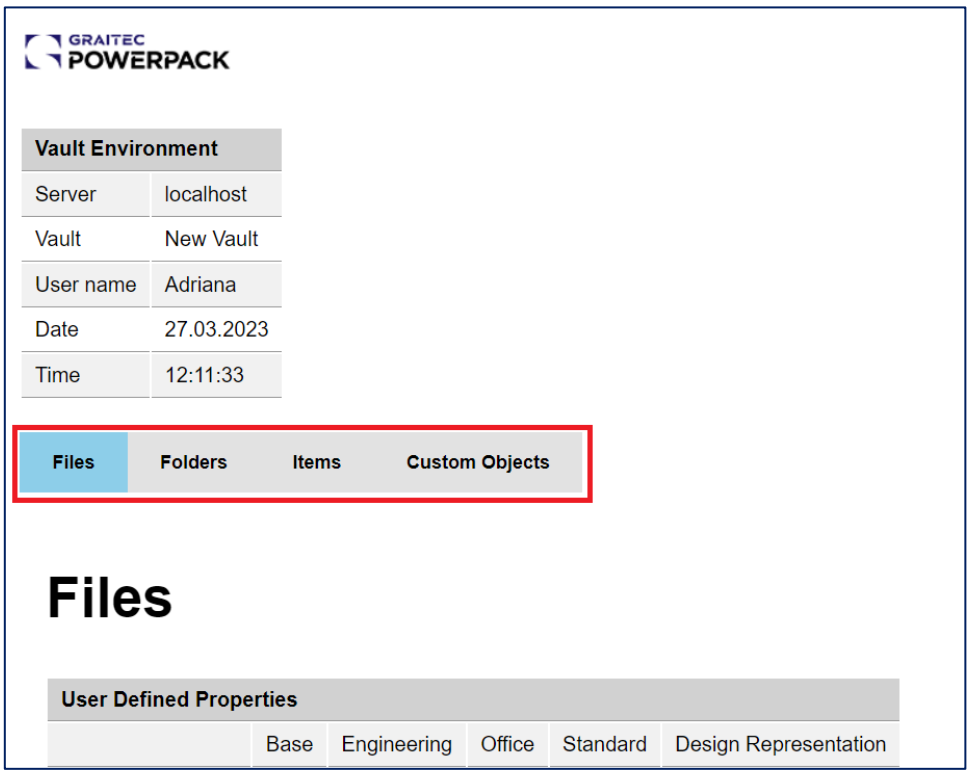


State Changes - Version 2023.1



Transitions - Version 2024

For better user experience, inside the HTML report the different objects Files, Folders, Items, and Custom Objects have been separated/grouped, so that it is clear, which table belongs to which object.


GRAITEC POWERPACK

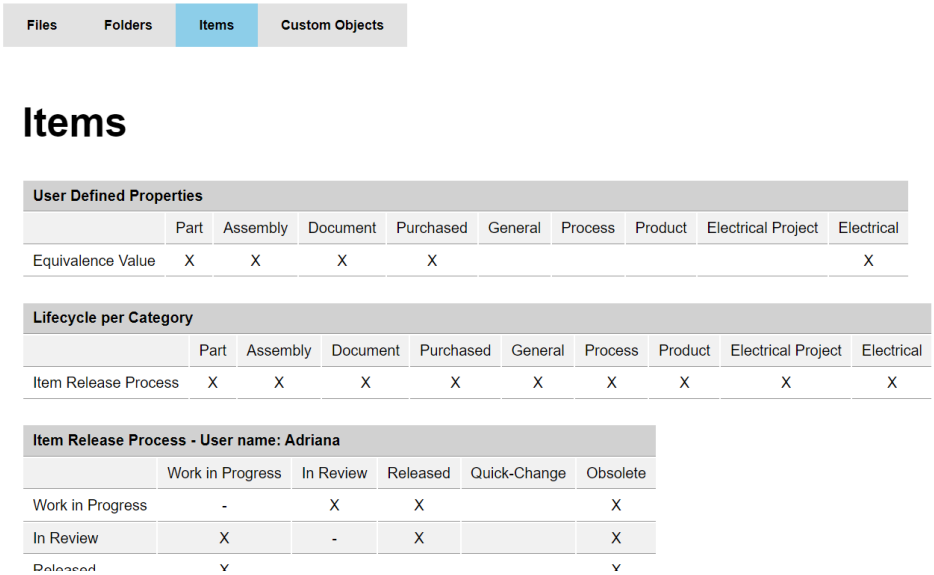
Vault Environment	
Server	localhost
Vault	New Vault
User name	Adriana
Date	27.03.2023
Time	12:11:33

Files | Folders | Items | Custom Objects

Files

User Defined Properties					
	Base	Engineering	Office	Standard	Design Representation

Groups inside the Vault configuration report


Files | Folders | Items | Custom Objects

Items

User Defined Properties									
	Part	Assembly	Document	Purchased	General	Process	Product	Electrical Project	Electrical
Equivalence Value	X	X	X	X					X

Lifecycle per Category									
	Part	Assembly	Document	Purchased	General	Process	Product	Electrical Project	Electrical
Item Release Process	X	X	X	X	X	X	X	X	X

Item Release Process - User name: Adriana					
	Work in Progress	In Review	Released	Quick-Change	Obsolete
Work in Progress	-	X	X		X
In Review	X	-	X		X
Released	X				X

Groups 2 inside the Vault configuration report

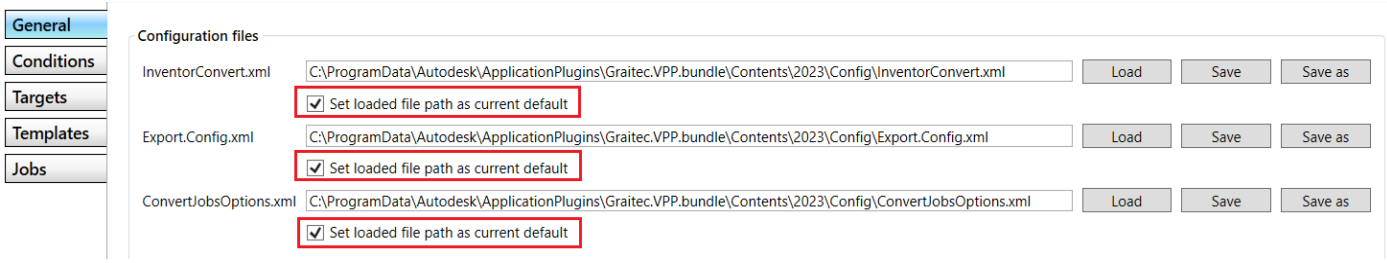
3.2 CONFIGURATION JOB - GENERAL TAB

In the general tab, the user can determine the file paths for custom XML's. These can be saved and loaded via the button options.

However, when the user exits the dialog the file path reverts to the hard code default location. This means that when the user returns to the dialog they must reload the required XML file and its file pathway.

For a better user experience, in version 2024 we have added an option to override the default file path with the saved file path.

When the file is loaded, there is a check box option to **'Set loaded file path as current default'**.



"Set the loaded file path as default" option

If the user exits and returns to the dialog, the loaded file path is previously loaded and remains in place until changed by the user.

If the user loads a different file path to a new XML file, then the **check box will become unchecked**, to force the user to reset it.

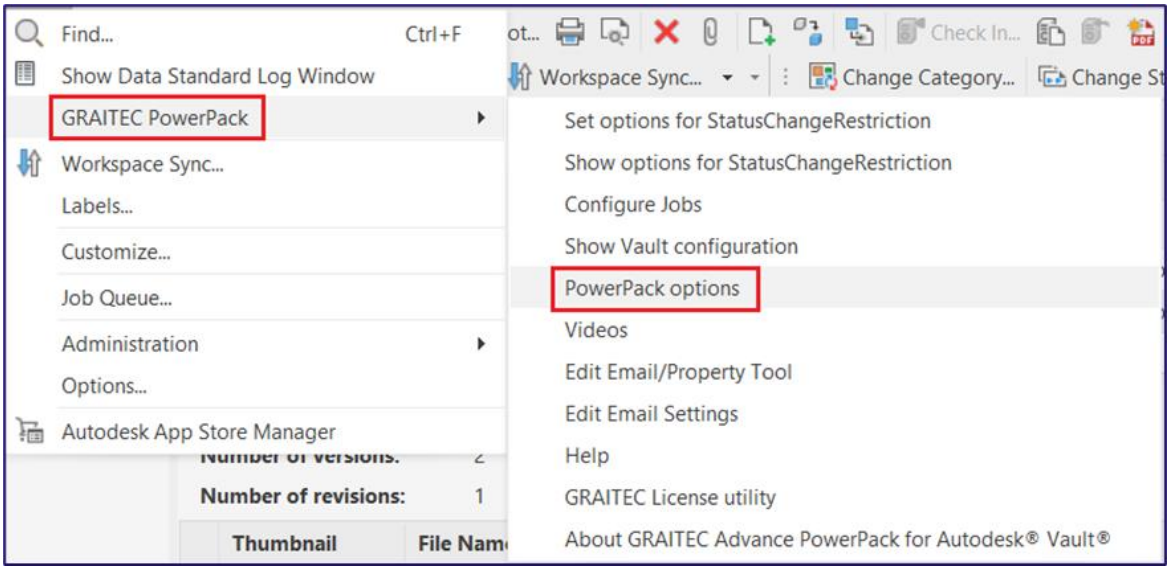
If the user does not reset the check box it should revert to the system default file path, again to remind the user to change it to the file path they require and reset the check box.

3.3 SPANISH LOCALIZATION

Starting with version 2024 of the PowerPack for Vault, we officially support the **Spanish** language.

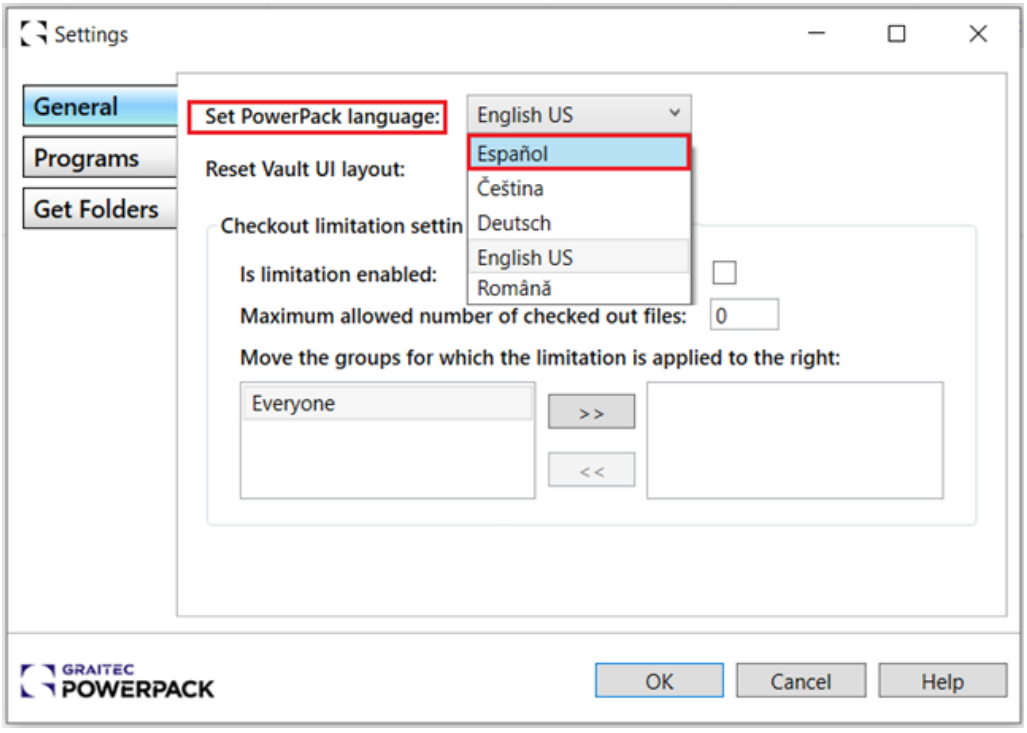
The PowerPack of Vault allows to change the interface language directly from the application, without being necessary to reinstall the application.

From the PowerPack Ribbon, go to the **PowerPack Options.**



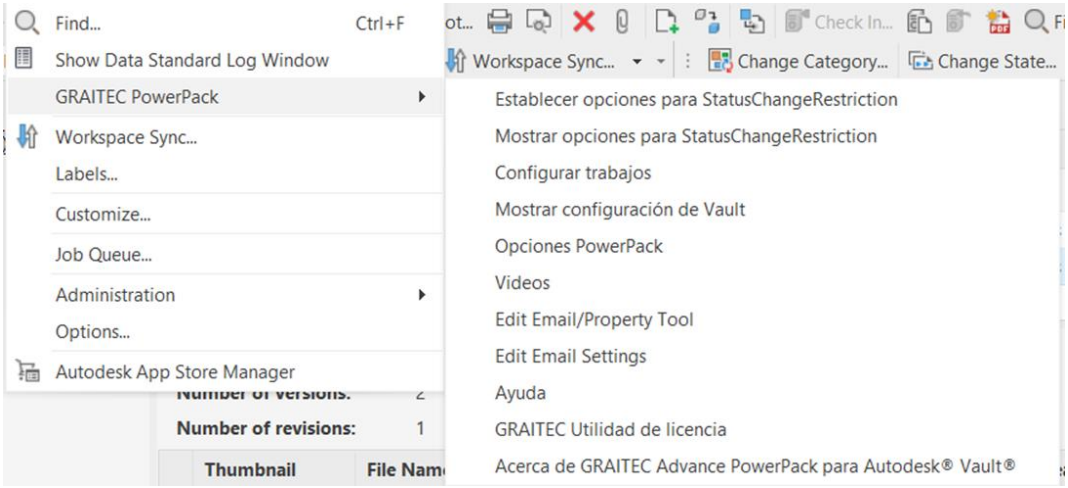
PowerPack options – change language

Under the General tab in the dialog, set the Powerpack language by choosing from the drop-down list Espanol.



Settings - Change language

Wait for a few seconds and the ribbon will be changed automatically into Spanish.



Spanish GUI