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Publish and Manage 2D PDFs in Vault 2018

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Learning Objectives

- discover the new automated PDF publishing capabilities in Vault 2018
- learn how to set up the publishing of 2D PDFs during the release process
- explore the different options for publishing PDFs of AutoCAD and Inventor drawings
- learn how to control access rights, property mapping, naming, and revisioning of the published PDFs

Description

In the latest release, Vault data management software introduced the capability to automatically publish and share 2D PDFs of drawings during the release process. In this class, we'll explore the different aspects of this new functionality. We'll take you through the steps to correctly set up this publishing process in Vault and show you the different publish options. The PDF format of a 2D design file is used in many firms to facilitate communications among engineering, purchasing, manufacturing, and other departments. We'll also teach you how to let users outside your engineering department access the PDFs for printing and other workflows. This session will feature Vault Professional data management software and Vault Workgroup, including the use of the Vault Job Processor.

Speaker(s)

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Peter Van Avondt works for Autodesk as a Technical Specialist Data Management (PDM/PLM) in Northern Europe, based in Belgium. After graduating as a master in electromechanical engineering he joined an Autodesk channel partner as a technical consultant specialized in 3D CAD and product data management (PDM). For the last 15 years he has built up a lot of experience in variety of Autodesk design tools as well as with Autodesk Vault and Fusion Lifecycle. In his current role, he uses this wealthy knowledge helping Autodesk resellers, prospects, and customers to adopt and implement the Autodesk solutions across different industries including industrial machinery, pharmaceutical, architecture, engineering and construction companies.



Kamil Cejpek
Technical Sales Specialist
Autodesk, spol.s r.o

Kamil joined Autodesk in 2011 and as a technical sales specialist he is currently supporting sales teams and channel partners in Poland, the Czech Republic, Slovakia and South-East Europe to develop PDM business in the region as well as helping to partners and customers with Autodesk Vault implementation projects. Prior joining Autodesk Kamil worked for Autodesk channel partner and delivered many successful Autodesk Vault initial implementation as well as existing environment migration projects.

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New Automated PDF Creation for Document Control

Vault 2018 introduces the #1 requested feature, the ability to create PDF files during the release process. Many firms use the PDF format of a 2D Drawing file to facilitate internal communications among engineering, purchasing, manufacturing and other departments. Further, PDF files are the de facto standard for external communication of new designs with customers as well as suppliers.

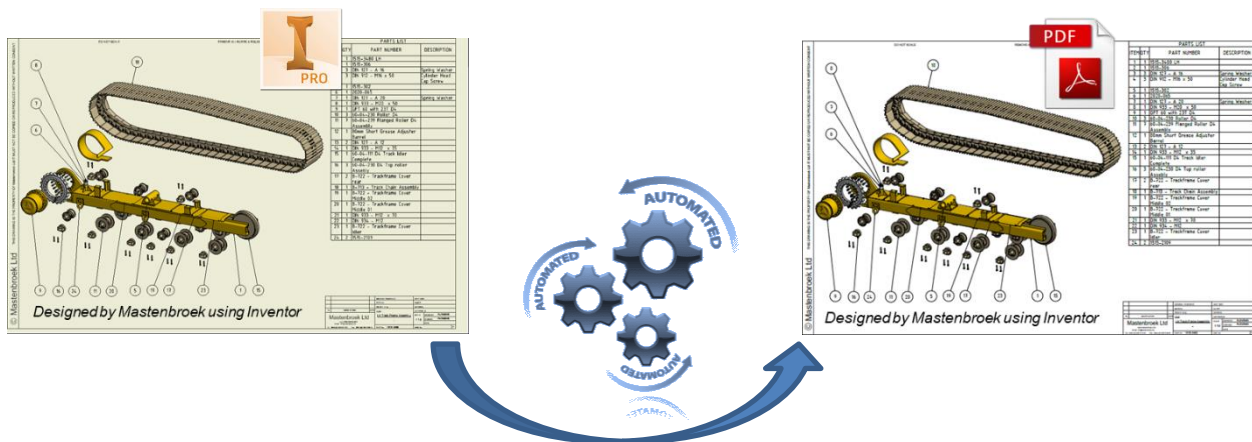
Autodesk Vault 2018 automatically renders PDF formats from 2D design files using the same settings as the authoring CAD systems. It supports all Inventor and AutoCAD drawings files and allows administrators of Vault to produce the same PDF quality as their CAD administrator counterparts.

Administrators may configure Vault 2018 to set how all PDFs are created by setting the PDF Options in Vault. The PDF files can be attached to the parent drawing, uploaded to the same or different file location in Vault and synchronized with the revision of the parent file. Specific settings for AutoCAD and Inventor drawings ensure the quality of the published PDF.

The Publish PDF capability within Vault 2018 supports engineering's team to keep all teams like shop-floor up-to-date while continue to maintain secure data so the right people can access the right data at the right time through the Vault Thin Client for example.

The Administrator has also the flexibility to configure which properties to be inherited from the CAD files and assigned to the PDFs. The PDFs are automatically assigned to a specific category, lifecycle definition which allow the administrators to manage their security access and properties independent of the associated design files.

In this document, you will get an overview on how to setup and configure the 2D PDF Publishing Feature within Autodesk Vault 2018.



Out of the box Vault setup

When a new Vault gets created in Vault Workgroup or Professional 2018 a new Category, Category Rule, Lifecycle, and a Lifecycle Action are available.

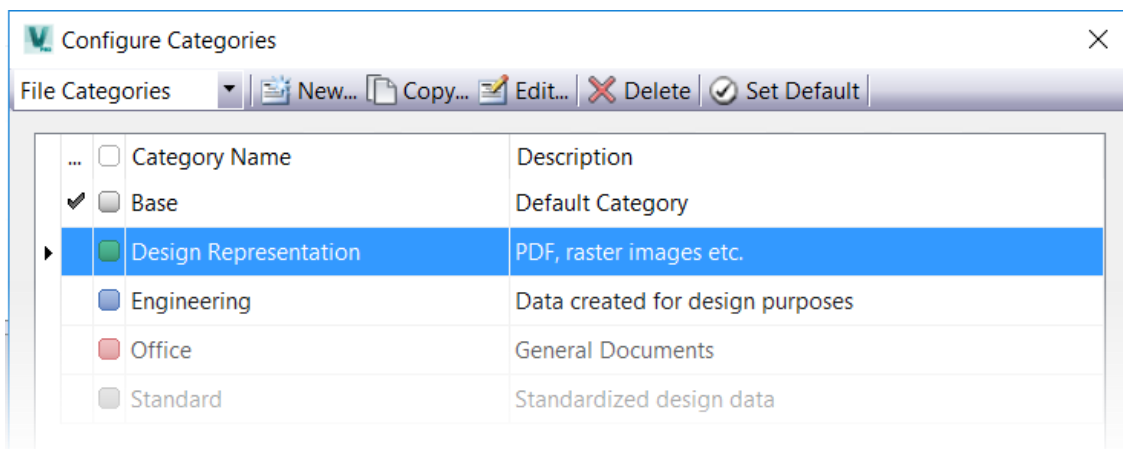
Note: For existing Vaults that have been migrated to Vault 2018, the Category, Category Rule and Lifecycle need to be manually configured. This will be explained later in this document.

Let's take a deep dive into these new out of the box settings...

The PDF Category

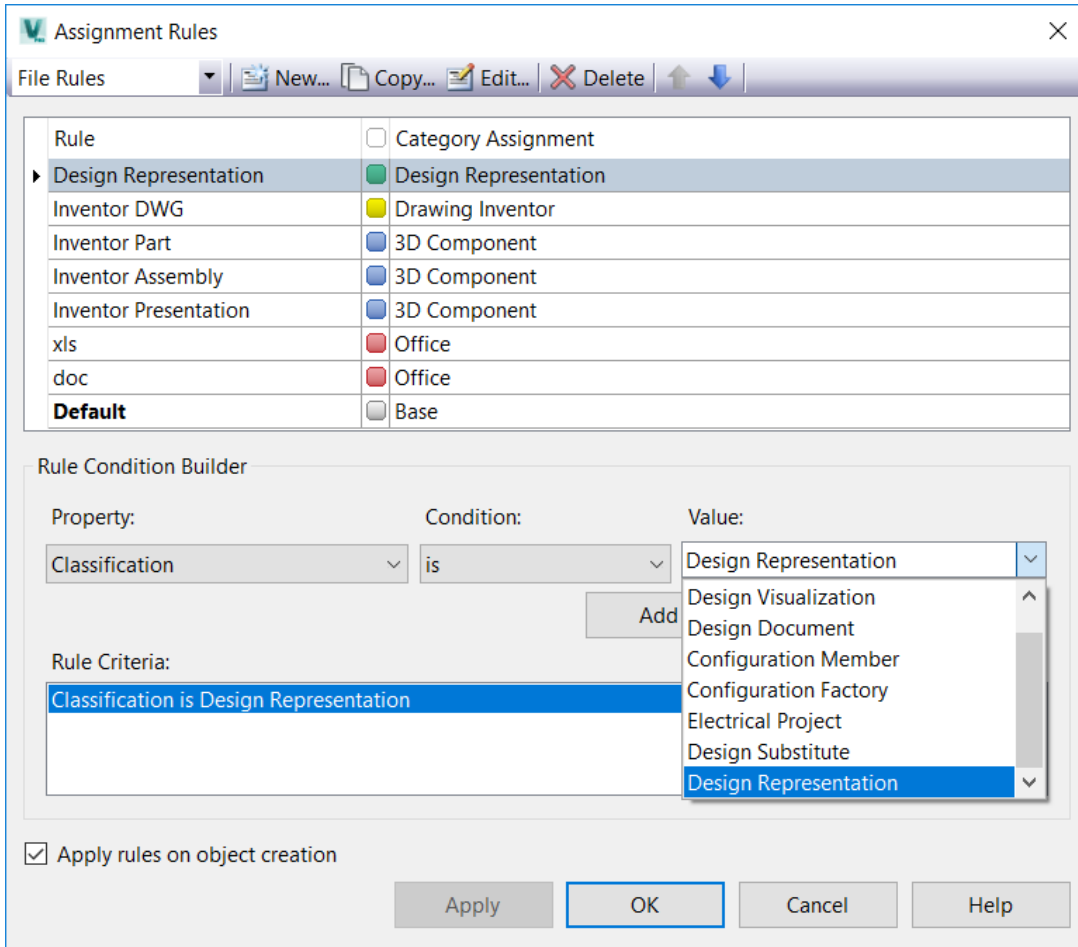
All PDF files created for document control in Vault 2018 are automatically assigned to the Design Representation category. A dedicated category allows administrators to manage their rules, lifecycles, and properties independent of the associated design files.

As a result, e.g. non-engineering staff like shop-floor users can access released PDFs within the Vault Thin Client w/o necessary need to have access to the native CAD files for printing and other follow workflows.



The Category Assignment Rule

A Design Representation Assignment Rule is used to assign the Design Representation category. Design Representation is also a special classification set on the PDF files created by the Job Processor, so Vault's logic identifies them.



This classification can be assigned, through the API, for other files by developing custom solutions. All files with the File Classification of Design Representation can be attached to a CAD file w/o creating a new CAD file iteration.

Note: More information about the specific API function can be found in the Vault SDK:

[Autodesk.Connectivity.WebServices Namespace](#) > [DocumentService Class](#) : AddDesignRepresentationFileAttachment

Adds an attachment to a Design Representation file without increasing the version of the file

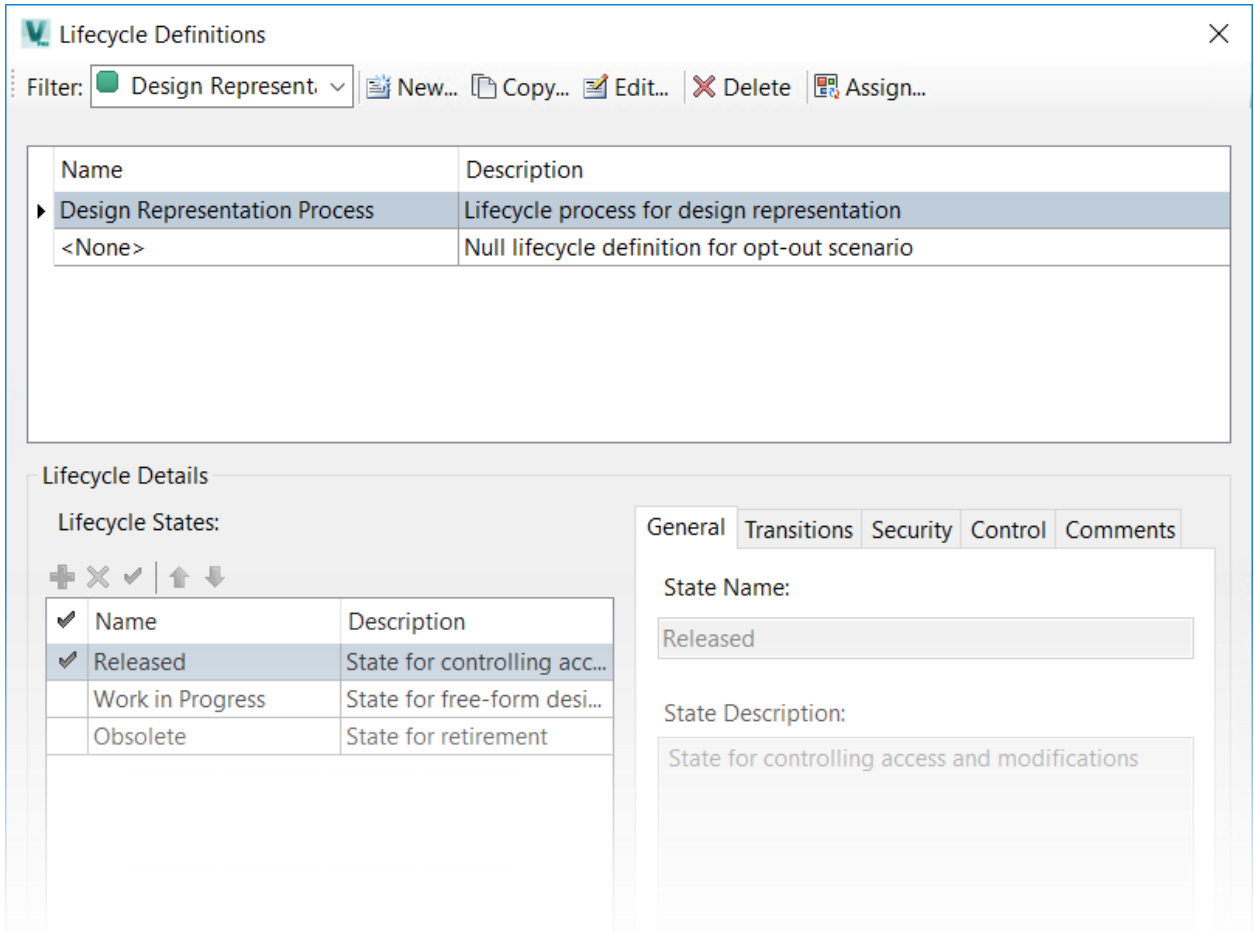
Parameters

fileId The ID of the parent file.

attachment The attachment.

The PDF lifecycle definition

A Design Representation Process lifecycle exists with three states; Released, Work in Progress and Obsolete. When the PDF file gets created after the design file is released, it uses the Design Representation Process lifecycle through the assignment of the Design Representation Category.



The screenshot shows the 'Lifecycle Definitions' window. The filter is set to 'Design Represent...'. The main table lists two lifecycle definitions:

Name	Description
Design Representation Process	Lifecycle process for design representation
<None>	Null lifecycle definition for opt-out scenario

Below this is the 'Lifecycle Details' section for the 'Design Representation Process' lifecycle. It includes a 'Lifecycle States' table and a 'General' tab for state configuration.

Lifecycle States:

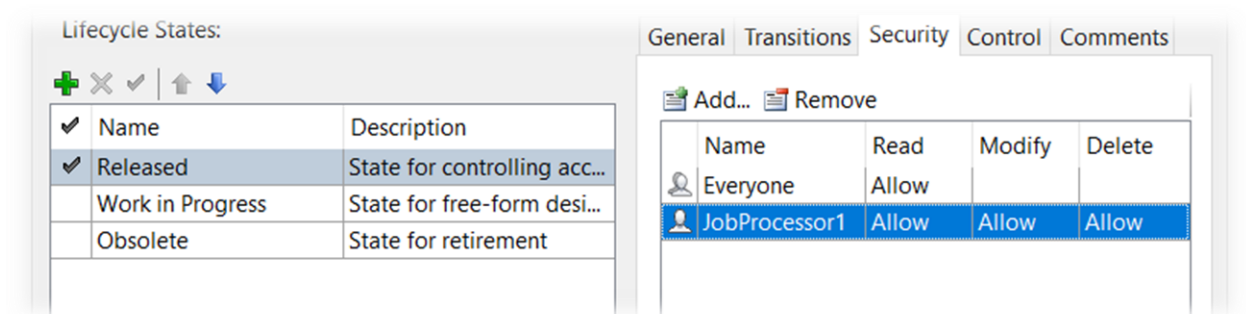
Name	Description
Released	State for controlling acc...
Work in Progress	State for free-form desi...
Obsolete	State for retirement

General Tab:

State Name: Released

State Description: State for controlling access and modifications

The administrator needs to configure the security of the Released state so that future versions of the PDF can be created. This means that the Job Processor user will need to have at least read and modify rights on the PDF file in the release state:



This screenshot shows the 'Security' tab for the 'Released' state. It displays a table of permissions for different users.

Lifecycle States:

Name	Description
Released	State for controlling acc...
Work in Progress	State for free-form desi...
Obsolete	State for retirement

Security Tab:

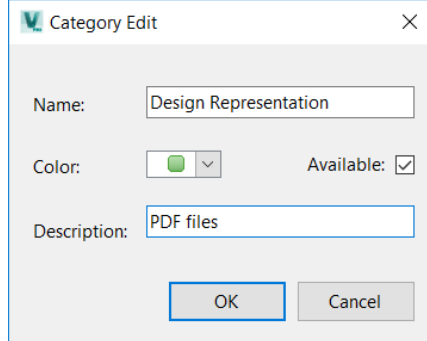
Name	Read	Modify	Delete
Everyone	Allow		
JobProcessor1	Allow	Allow	Allow

Configure a migrated Vault for PDF Publishing

Existing Vaults that have been migrated to Vault 2018 will not be automatically configured to have the specific PDF settings. The PDF Category, Category Rule and Lifecycle need to be manually configured.

You can follow these steps to configure your Vault:

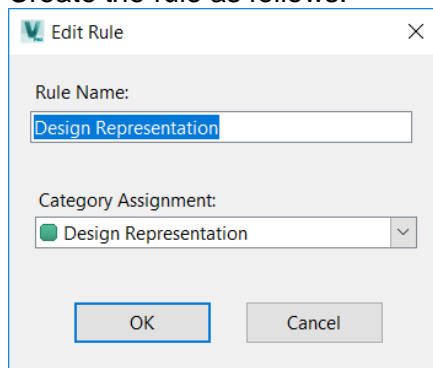
1. Create the Design Representation Category:
 - a. Go to “Tools” menu
 - b. Select “Administration”
 - c. Go to the “Behaviors” tab
 - d. Select “Category”
 - e. Within the Category types dropdown select “File Categories”
 - f. Select “New”
 - g. Configure the category as follows:



- h. Click “OK” and close the “Configure Categories” dialog box

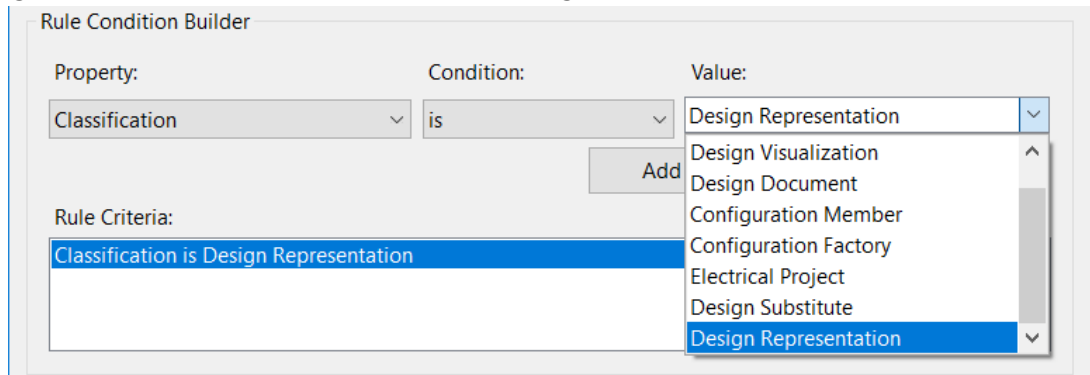
Note: You are not bound to the Category Name “Design Representation”, however this name will be used throughout the rest of this documentation.

2. Create the category assignment rule:
 - a. Within the “Behaviors” tab in the Vault settings dialog box, Select “Rules”
 - b. Select “File Rules” from the filter dropdown
 - c. Select “New”
 - d. Create the rule as follows:



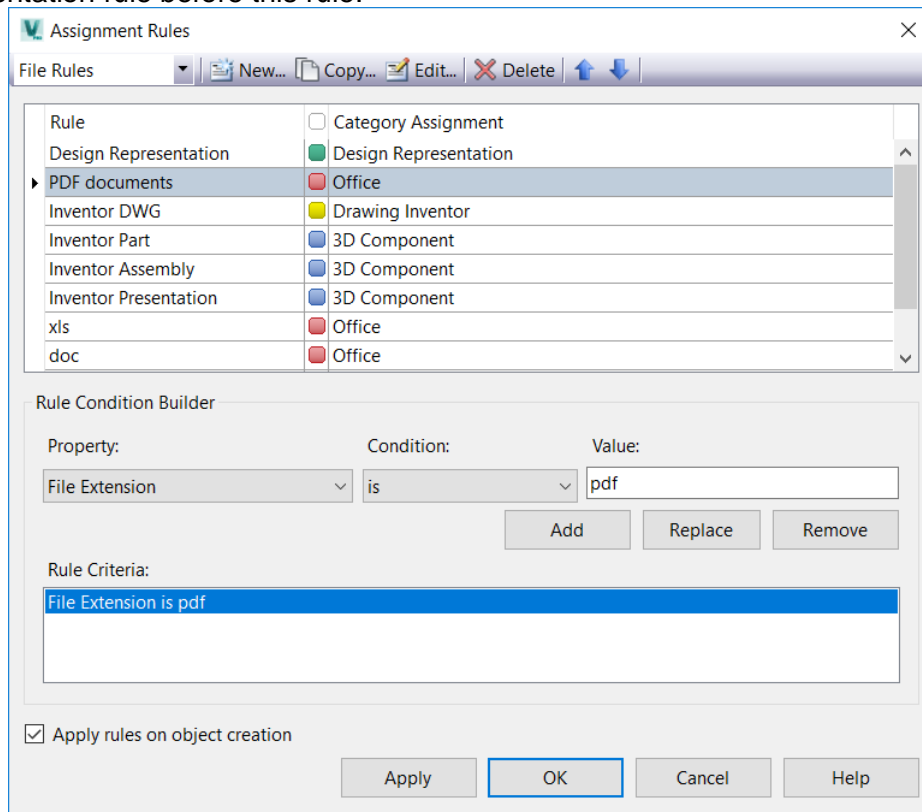
Note: You are not bound to the Rule Name “Design Representation”, however this name will be used throughout the rest of this documentation.

- e. Click OK to confirm
- f. Within the Rule Condition Builder, create the following rule:
 - Property: "Classification"
 - Condition: "is"
 - Value: "Design Representation"
- g. Click on "Add" to add the rule to the "Rule Criteria"



- h. Click on OK to confirm and close the assignment rules

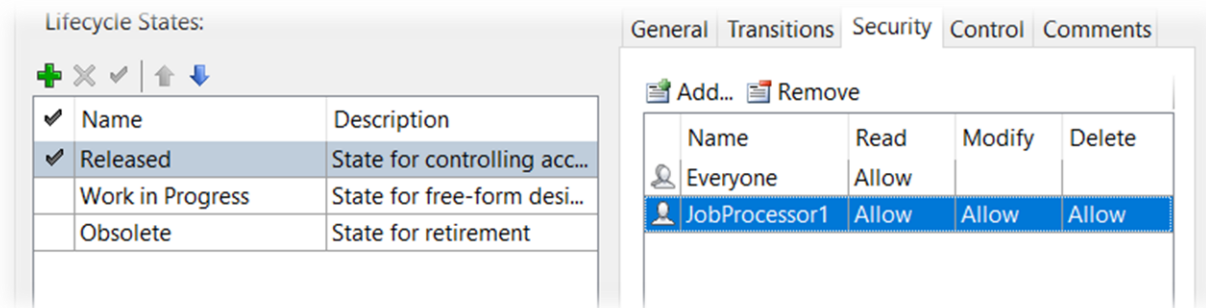
Note: Make sure to place the assignment rule in the correct order. If you have already an assignment rule for PDF documents in place you need to put the Design Representation rule before this rule:



3. Create the Design Representation Process Lifecycle
 - a. Create a new lifecycle definition with the following settings
 - Definition Name: "Design Representation Process"
 - Category: "Design Representation"
 - Description is optional

Note: You are not bound to the Lifecycle Definition Name "Design Representation Process", however this name will be used throughout the rest of this documentation.

- b. Add following lifecycle states:
 - Released
 - Work in Progress (optional)
 - Obsolete (optional)
- c. Make the Released state default
- d. Configure for all these states the Security.
 Make sure that in the release state the Job Processor user has at least read and modify rights.



- e. All other Lifecycle state configuration settings are optional.

Note: For more information about how to setup a lifecycle definition please refer to:
<https://knowledge.autodesk.com/support/vault-products/learn-explore/caas/CloudHelp/cloudhelp/2018/ENU/Vault-Admin/files/GUID-088F0236-B5B7-4E35-B218-BD2D253B87F6-htm.html>

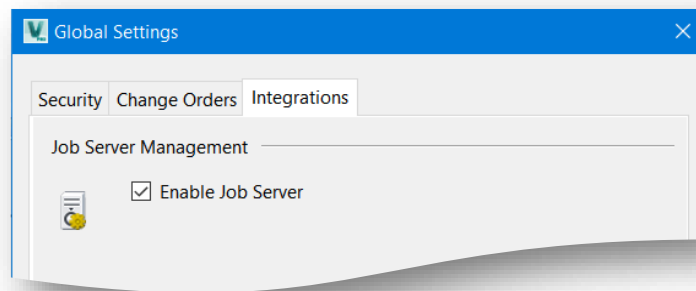
Note: Besides a specific Lifecycle, Revision schemes and Properties can be assigned to the Design Representation Category. This will be explained in the advanced configuration section of this document.

Publish 2D PDF during Engineering Release Process

Once the PDF configuration is in place (either the out of the box configuration or the manual configured one) administrators may configure Vault 2018 to automatically publish PDF files for document control during final release. During this transition, Vault's Job Processor automatically updates the drawing references and properties to ensure an accurate PDF representation.

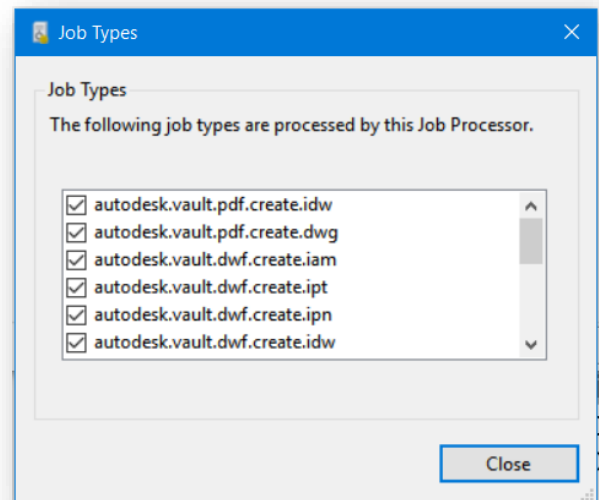
Job Processor Setup

To start creating 2D PDF files, an Administrator must turn on the Job Server and configure the system to start using the capability.



With Vault 2018 Job Processor will have 2 new jobs available out of the box:

- autodesk.vault.pdf.create.idw
- autodesk.vault.pdf.create.dwg



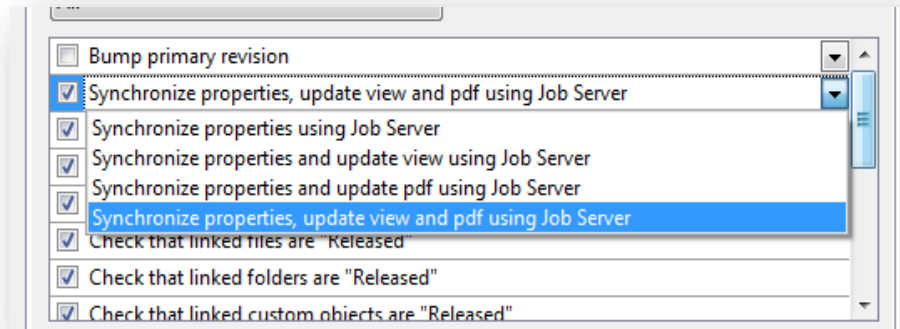
Note: For publishing pdf files from Autocad 2D Drawings the Job Processor uses DWG Trueview. For Inventor 2D drawings Autodesk Inventor is currently used during the publishing process.

Note: More information about setting up a Job Processor can be found here: <https://knowledge.autodesk.com/support/vault-products/learn-explore/caas/CloudHelp/cloudhelp/2018/ENU/Vault-Admin/files/GUID-41C25A0B-81DC-4E5B-B98B-3EA7B280CD97-htm.html>

Configure your Engineering Lifecycle

To automatically publish 2D PDF files during your engineering lifecycle, an Administrator must add specific actions to the lifecycle state transitions. In Vault 2018 2 new transition actions are added to the actions list:

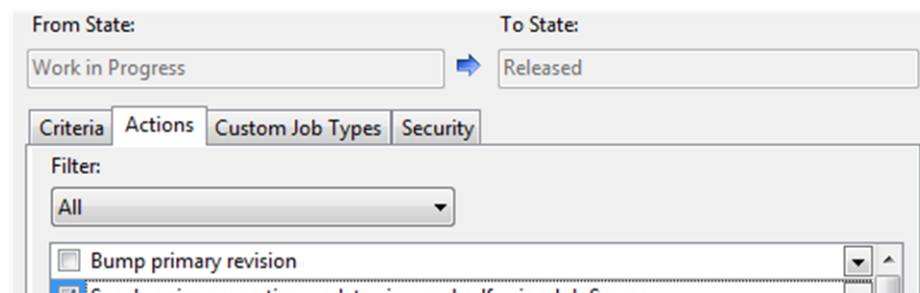
- Synchronize properties and update pdf using Job Server
- Synchronize properties, update view and update pdf using Job Server



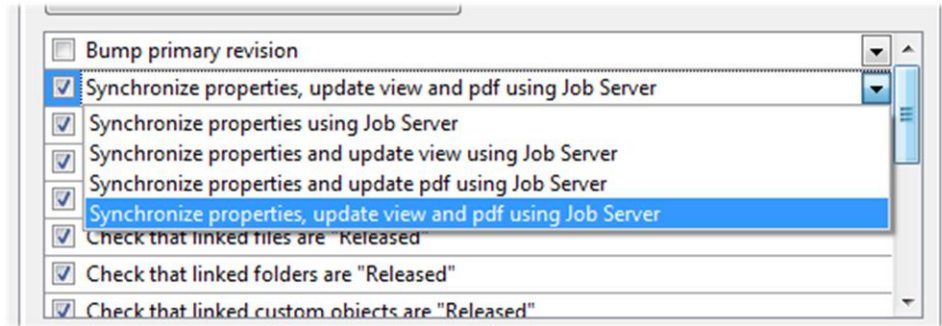
Note: These actions are only valid for File Lifecycle Definitions

The following steps explain how to configure your engineering release lifecycle to automatically publish 2D PDFs:

1. Go to “Tools” menu
2. Select “Administration”
3. Select “Vault Settings”
4. Select the “Behaviors” Tab
5. Select “Lifecycles...” under Lifecycles and Revisions
6. Select your engineering release lifecycle (e.g. “Flexible Release Process”)
7. Select the “Edit” button
8. Initiates “Lifecycle Definition – Flexible Release Process” dialog
9. Select the “Transitions” Tab
10. Select a lifecycle transition (i.e. “Work in Progress” to “Released” transition)
11. Click on the “Edit” button
12. Select the “Actions” Tab



13. Select “Synchronize properties and update pdf using Job Server” or “Synchronize properties, update view and pdf using Job Server” from the dropdown list.



Note: Make sure you are also ticking the checkbox for this action.

14. Click on the OK button to confirm your settings
15. Close the Life Cycle Definition Dialog
16. Close the Vault settings Dialog

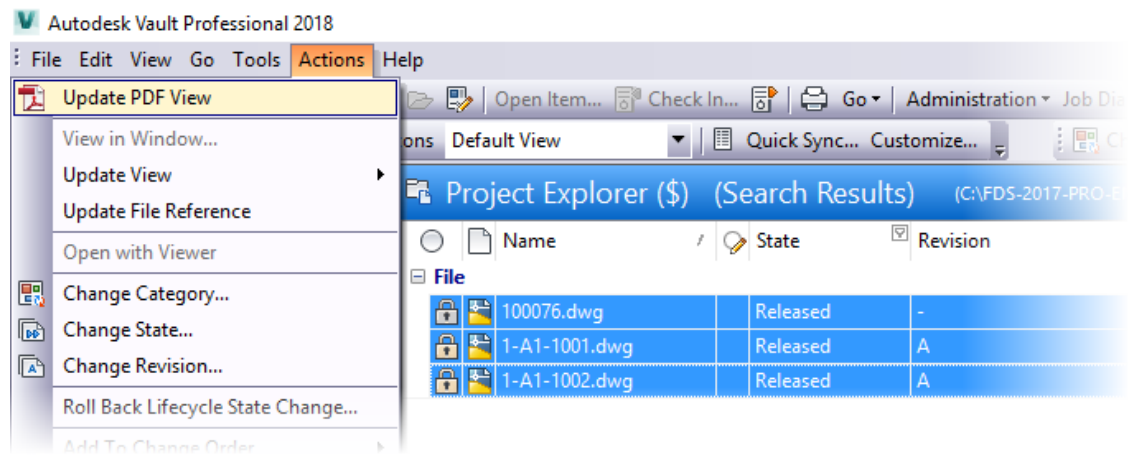
Important note: However you could configure the publish PDF action on any given lifecycle transition, the published PDF job will only be executed when the source file is transitioned to a released state.

Once you have done the configuration of your engineering lifecycle definition you can start publishing your 2D PDF files. Depending on the PDF publishing options chosen, other settings need to be made to the engineering release lifecycle definition or the Design Representation Category. Please refer to the specific PDF Publishing options in the next section of this document for more details.

Create PDF Files for legacy Released Data

The Job Processor Job to create and attach PDF Design Representation drawings for Inventor 2D and AutoCAD 2D drawings is always initiated from a lifecycle transition to a released state. For existing, released drawings you can't create the PDF files without a re-release workflow.

To overcome this a Vault Data Standard Extension can be installed that implements a manual command to initiate the job execution for legacy drawings without version / revision increment:



Just select the Released Files (multi select supported) and select the Update PDF View Command from the actions menu. For every individual drawing the PDF Publishing Job will be added to the Job Queue.

The Vault Data Standard Extension can be downloaded from the Autodesk Knowledge network: <https://knowledge.autodesk.com/community/article/115436>

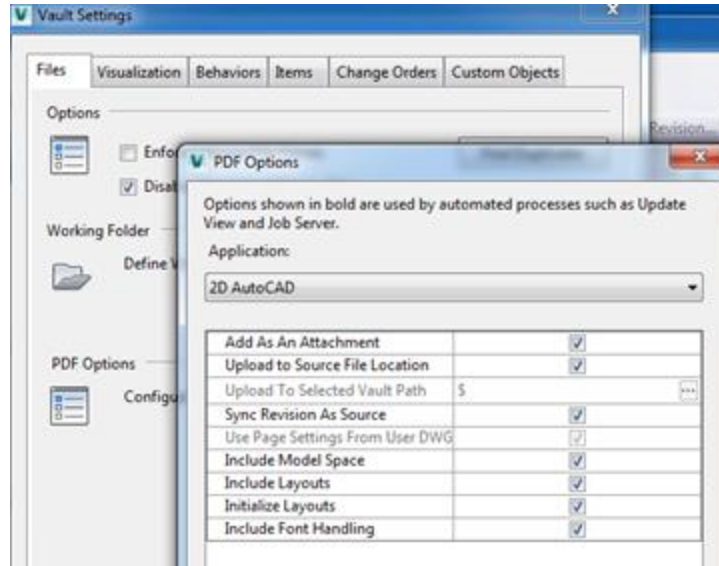
Follow the step by step instructions included in the download - subfolder \Documentation\ - to integrate the feature in your environment.

Note: To use this extension, Vault Data Standard Version 2018.x should be installed. More information about Vault Data Standard can be found here: <https://knowledge.autodesk.com/support/vault-products/learn-explore/caas/CloudHelp/cloudhelp/2018/ENU/Vault-General/files/GUID-D475D22B-3873-4B78-9936-DD773F109136-htm.html>

PDF Publishing Options

With all lifecycle, category and other configurations done, it is time to look at the PDF publishing options. The PDF Options determine how the content is published in the PDF file. You can also set specific behaviors like whether to attach PDFs to their source files, where to save the PDFs and if they should take the source revision number, etc.

The PDF Publishing options are found on the Files tab of the Vault Settings dialog box:
(Go to: Tools > Administration > Vault Settings > Files tab)



Within this dialog box the PDF Publishing Options for 2D AutoCAD and 2D files can be configured separately. However, some of the options are common for both applications: Add as an Attachment, Upload to Source File Location, Upload To Selected Vault Path and Sync Revision as Source.

Within the next paragraphs we will explain each of this settings in depth and explore the Inventor and AutoCAD application settings:

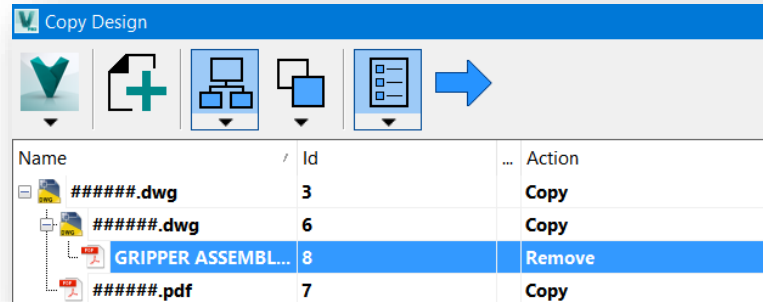
Add as attachment

Using this option, the published PDF file will be linked as an attachment to the source file:

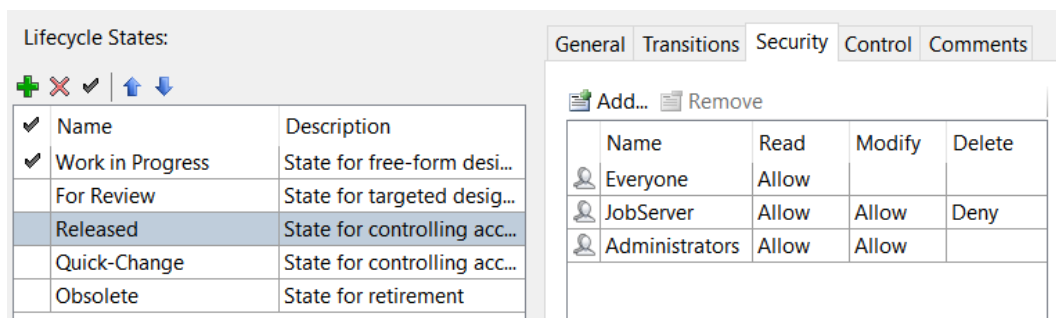
File Name	Classification
000002.dwg	None
Attachments	
000002.dwg.pdf	Design Representation

Note: Moving a Design representation file while attached to the source file is allowed, but will not move the source file (or vice versa). When a published PDF is moved or renamed the next time a PDF file is published from the source file a new PDF file will be created with the configured name instead of creating a new file iteration of the renamed or moved PDF.

Note: When using Copy design on the source file, the design representation files will be listed as a linked attachment. Manual remove the PDF from the copy action to avoid non-matching PDF representation files to be attached to the copied source file:



Note: The pdf can only get attached to the source file if the user logged in on the job processor (running the pdf publishing job) has modify rights on the source file in the giving lifecycle state:



JOB SERVER USER HAS MODIFY RIGHTS ON THE RELEASED STATE

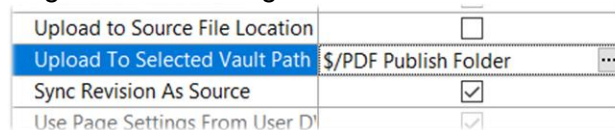
Follow the following steps to setup the correct security settings for the Job Processor User:

1. Go to "Tools" menu in the Vault Thick Client (logged in as an Administrator)
2. Select "Administration"
3. Select "Vault Settings"
4. Select the "Behaviors" Tab
5. Select "Lifecycle..." under Lifecycles and Revisions
6. Select your engineering release lifecycle (e.g. "Flexible Release Process")
7. Select the "Edit" button
8. Choose the lifecycle state "Released" to perform the steps below;
 - a. Select "Security" Tab
 - b. Add your Job Processor user (if not already present)
 - c. Modify the Job Processor User's rights under the "Modify" column
 - d. Select "Allow"
9. Select "OK" button once you are done
10. Close the Lifecycle definition and Vault Settings window

PDF File Location

By default, the PDF file is placed on the same folder location of the source file.

By unticking the option “Upload to Source File Location” you will have the possibility to specify a publish folder for your PDF files. The option “Upload To Selected Vault Path” will then be available and allows you to define specific location within Vault to store the published PDF file using a Browse dialog:

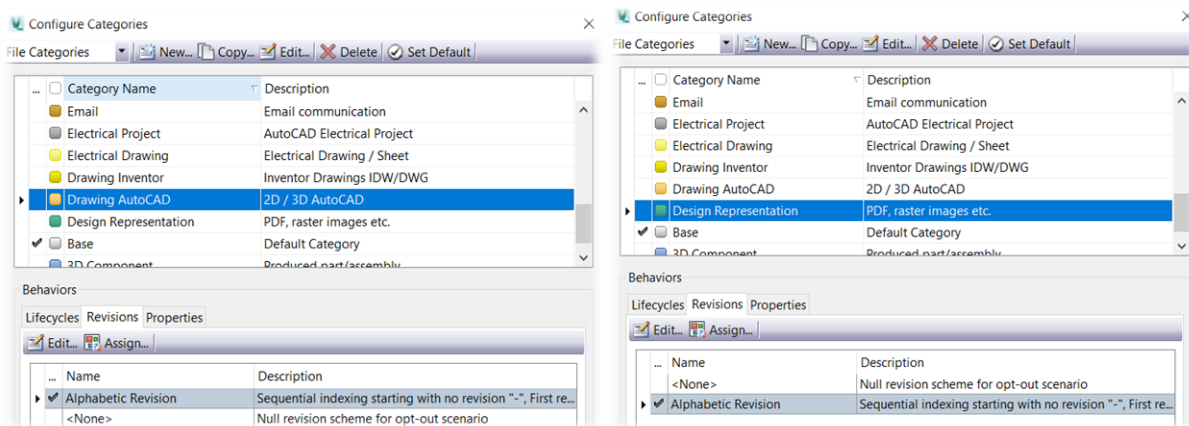


Note: If you choose to publish the PDFs to a selected Vault Path, the PDFs will be published in a flat folder structure.

Revision Synchronisation

“Sync Revision From Source” allows both the published PDF and its Source file to have an identical revision index value.

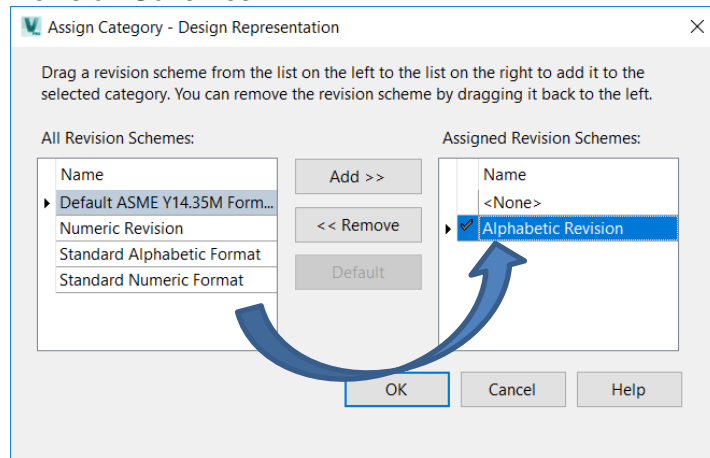
If you want your PDFs to take the source file’s revision index then your PDF Design Representation Category must have the same revision scheme as the source files set to the default:



Follow these steps to configure your Design Representation Category correctly:

1. Go to the “Tools” menu
2. Select “Administration”
3. Go to the “Behaviors” tab
4. Select “Category”
5. Within the Category types dropdown select “File Categories”
6. Select the Design Representation Category
7. Go to the “Revisions” Tab in the “Behaviors” section
8. Click the “Assign...” button

9. Drag the Default Revision Scheme from the source file category to the Assigned Revision Schemes:



10. Select the Revision scheme and click on the “Default” button
11. Click OK to apply the changes
12. Close the Categories Configuration and Vault Settings dialog boxes
13. Configuration completed

Note: If your PDF revision scheme is different, or <none>, then PDFs will generate but without the revision index synced. Because of this mismatch the PDF will not be attached to the source file even if this publish option was selected.

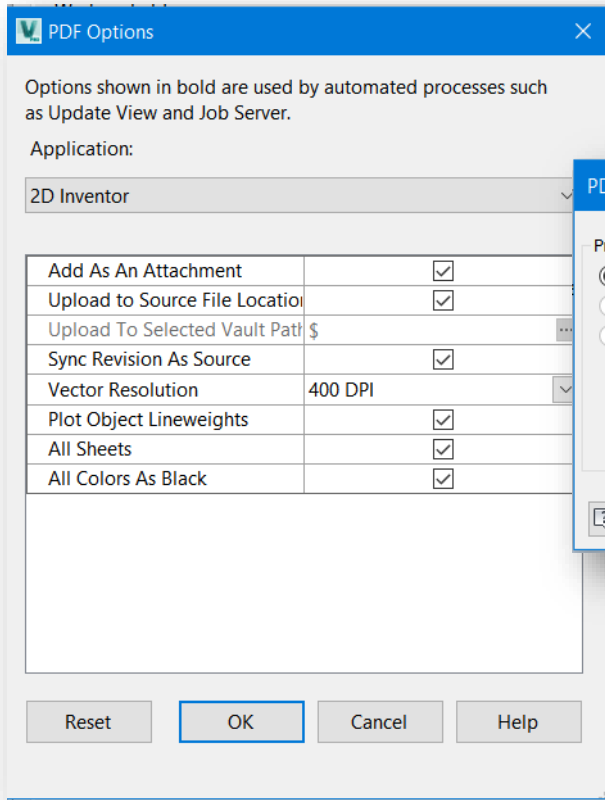
Note: Only the revision index is synced, the lifecycle states are not synced.

PDF Options for Inventor Drawings

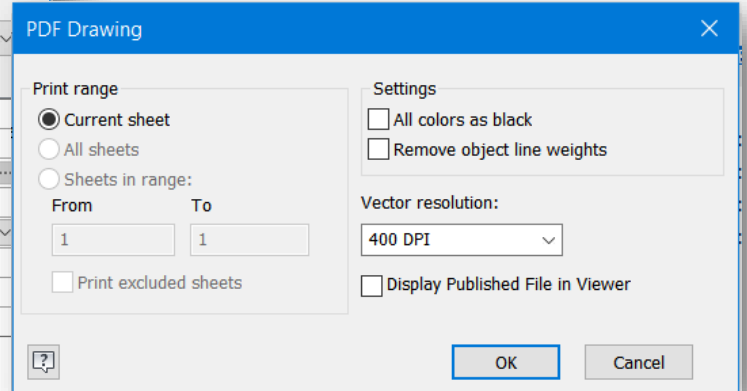
Within the PDF Options dialog box you can configure specific options for Autodesk Inventor Drawings by selection the “2D Inventor” filter in the Application drop down.

The settings available in Vault are the same settings as within the PDF Publish options in Inventor:

- **Vector Resolution:** Set as 400 DPI by default for managing large PDF file size and appropriate details.
- **Plot Object Lineweights:** Enables the published PDF file to display a consistent lineweight for object and consistent lineweight for linetypes.
- **All Sheets:** Prints all the sheets in the drawing. Will not print sheets for which the Exclude from Printing option is checked in the Edit Sheet dialog box in the AutodeskInventor drawing environment.
- **All Colors As Black:** Prints the drawing in black and white. Embedded images and shaded views are still printed in color.



PDF OPTIONS WITHIN AUTODESK VAULT

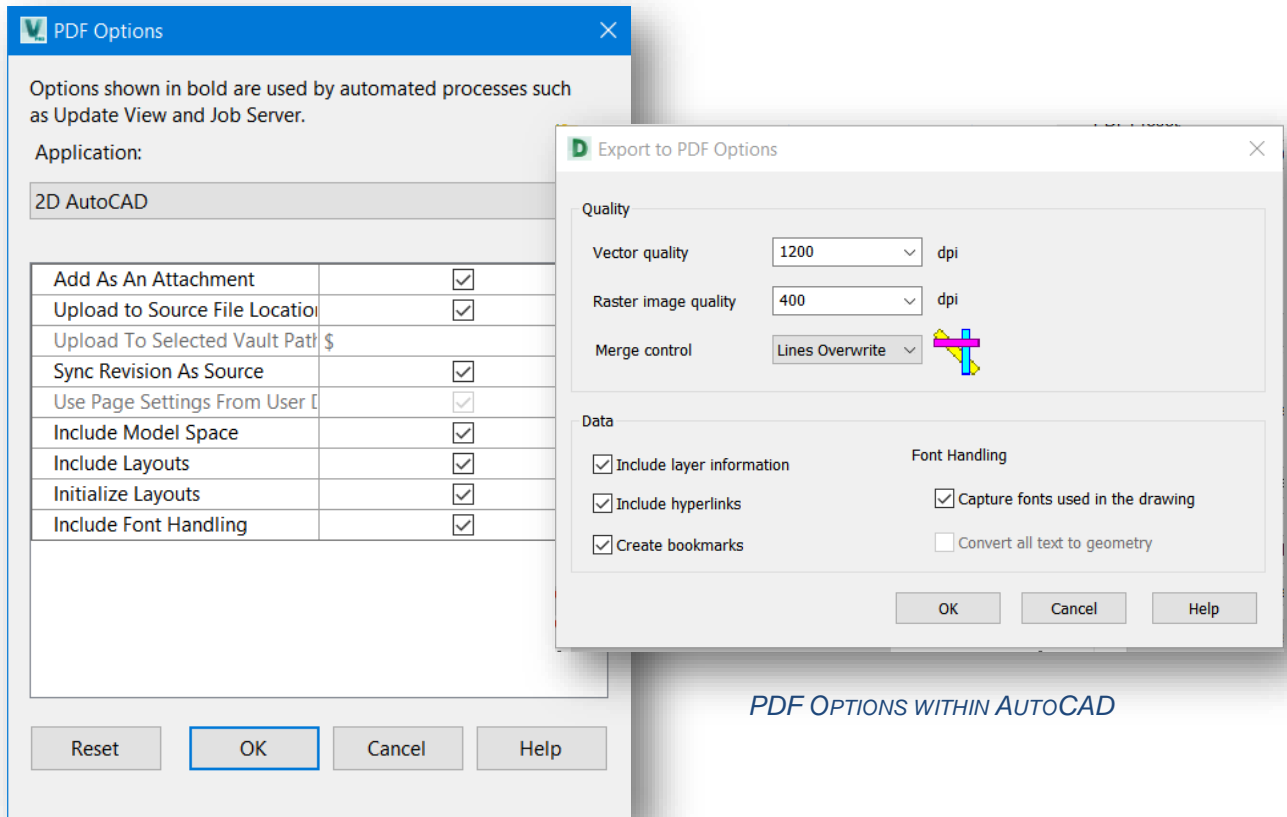


PDF OPTIONS WITHIN AUTODESK INVENTOR

PDF Options for AutoCAD Drawings

To specify the PDF publishing options for Autocad 2D drawings select “2D AutoCAD” from the Application Drop down list. Following AutoCAD specific settings are available:

- **Use Page Settings From User DWG:** Eliminates the need to reconfigure page settings in Vault if previously done in the native application. Checked and cannot be unchecked (always applied).
- **Include Model Space:** Enables the published PDF file to contain model space view.
- **Include Layouts:** Enables the published PDF file to contain model space view only.
- **Initialize Layouts:** Supports legacy AutoCAD files.
- **Include Font Handling:** Enables publishing a PDF file with font styles. This option is identical to AutoCAD “Capture fonts used in the drawing” setting.



PDF OPTIONS WITHIN AUTOCAD

AUTOCAD PDF OPTIONS WITHIN AUTODESK VAULT

- Note:** Compared to the publish options in AutoCAD some limitations do apply:
- Custom Page Setup: The latest Page Setup configured in the Source file will be used during the PDF Publishing. Currently a page setup override is not possible. (e.g. print in monochrome)
 - Quality control: The default Quality Control settings are used (Vector quality, Raster image quality, Merge control).
 - Layer Publish: Layer information is not included in the published PDF
 - Hyperlinks: Hyperlinks are not included in the published PDF
 - Bookmarks: Bookmarks are for sheets only

Advanced PDF Publishing settings

In the previous section an overview of the common PDF publishing options was given. The following section will cover the more advanced (sometimes hidden) behaviors, capabilities and options of the PDF publishing feature.

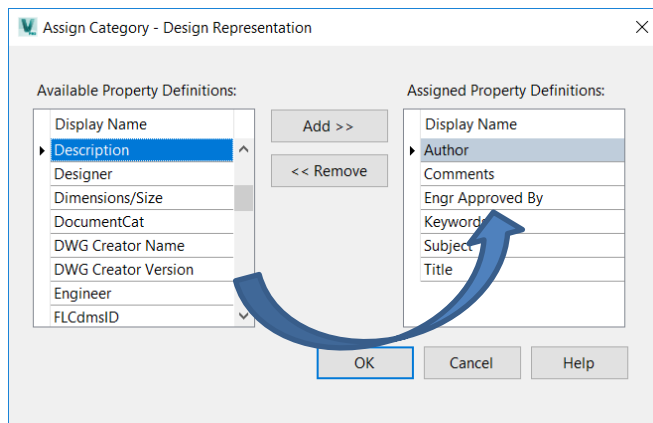
Property synchronisation

To make it possible for non-engineering staff to search and filter on the Published PDF files without having access to the native source files, the properties from the source files can be automatically synced to the design representation PDF file.

Note: PDF Content can also be indexed for searching. To find out more please review the following AKN article: <https://knowledge.autodesk.com/support/vault-products/learn-explore/caas/simplecontent/content/indexing-properties-adobe-pdf-files-vault.html>

The Administrator has the flexibility to configure which properties to be inherited from the CAD files and assigned to the PDFs. To configure this, the administrator should assign the same user defined properties (UDP) from the source file to the Design Representation Category:

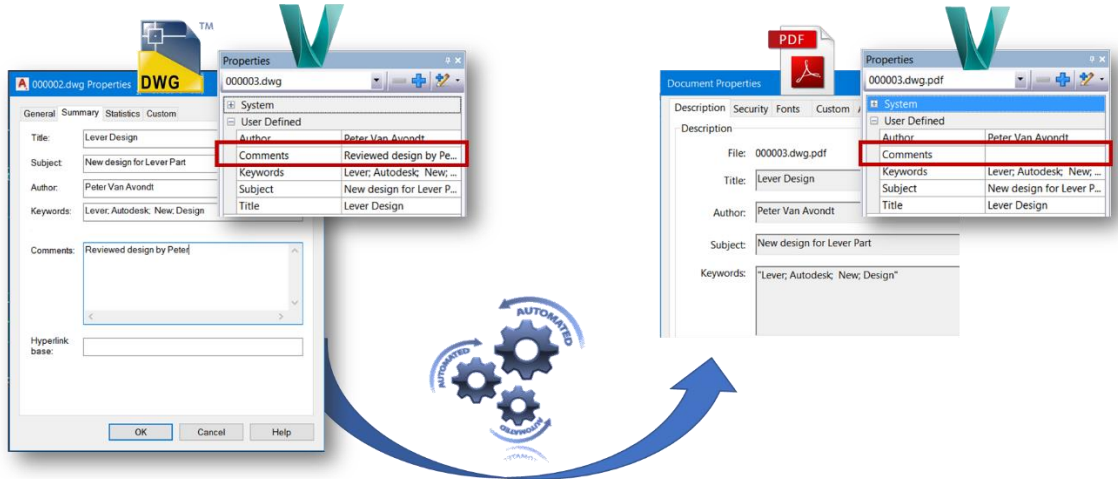
1. Go to the “Tools” menu
2. Select “Administration”
3. Go to the “Behaviors” tab
4. Select “Category”
5. Within the Category types dropdown select “File Categories”
6. Select the “Design Representation” Category
7. Go to the “Properties” Tab in the “Behaviors” section
8. Click the “Assign...” button
9. Drag the Property Definitions from the source file category to the Assigned Property Definition for the Design Representation Category:



10. Click OK to apply the changes
11. Close the Categories Configuration and Vault Settings dialog boxes
12. Configuration completed

Note: System properties cannot be inherited.

During the PDF Publishing process, the source file properties are not written back to the PDF file properties, but only updated on the Vault user defined properties. Therefore it is important to review your property mappings for the property definitions you want to assign to the Design Representation Category. Failing of setting the correct mappings will end in empty properties:



In the above example, you will see that the “Comments” Property is empty for the Published PDF file however the “Comments” field was filled in the source file. This is due to the default property mapping on the “Comments” Property definition:

Entity	Provider	File Property	Type	Classification	Mapping	Create
File	Inventor	Comments	Text	Standard		Yes
Provider: Inventor DWG						
File	Inventor DWG	Comments	Text	Standard		Yes
Provider: Office 97-2003 Documents						
File	Office 97-2003 Documents	Comments	Text	Standard		Yes
Provider: Office Documents						
File	Office Documents	Comments	Text	Standard		Yes
Provider: Other Files						
File	Other Files	Comments	Text	None		No

To make sure the property is filled correctly, you need to remove the mapping for the Provider “Other Files”:

1. Go to the “Tools” menu
2. Select “Administration”
3. Go to the “Behaviors” tab
4. Under “Properties” select the “Properties...” button
5. Navigate to the “Comments” Property (or other property that needs to be modified)
6. Click the “Edit” button at the top of the dialog box
7. Select the “Mapping” tab
8. From the mappings select the mapping for the “Other Files” provider
9. Click the icon with the black cross to remove it.
10. Click OK to confirm your setting
11. Optional: Repeat for other properties if needed
12. Close the Properties and Vault Settings dialog boxes
13. Configuration completed

Note: The Provider “Other Files” is also used for other file formats than PDF files. If you want to capture the property values of these files in a property in Vault I would suggest you make a specific User Defined Property for these. (e.g. “Comments (Other Files)”) with a single mapping from the file to that UDP.

Note: Exceptions to this behavior are the following properties: Author, Title, Keywords, Subject. These are standard PDF file properties that will be filled with the values of the source file properties during the PDF creation by default. For these properties, you could keep the default mapping in Vault.

PDF File Naming configuration

When a PDF file gets created, the name of the file is by default the same name as the parent file plus the “.pdf” extension:

File Name	Classification
000002.dwg	None
Attachments	
000002.dwg.pdf	Design Representation

As an Administrator, you will have the ability to customize the file names of PDFs created by the Job Processor during a transition to the Released lifecycle state. The configuration needs to be made on each Job Processor that is used for PDF publishing:

1. Navigate to the JobProcessor.exe.config located in the <install dir>\Vault Professional 2018\Explorer folder
2. Before making modifications to it, make a backup copy of that file
3. Use a text editing software, such as Notepad, to open and edit the file
Note: Other applications may corrupt the XML file so be careful about the application that you use.
4. In the appSettings section after the “<add key=“TrueViewDwfPublishCount” value=“500”/>” line, you will add the following keys to customize the PDF name:

```
<add key="DesignRepresentation.Naming" value="\.(idw)$/PreFix-
<_name_&gt;;-PostFix<_ext_&gt;"/>
```

5. Adjust the “value” to your needs with the following building blocks:

`\.(idw)$/PreFix-<_name_>;-PostFix<_ext_>`

- `\.(idw)$` Extension for which this rule applies (mandatory)
Accepted values:
 - `\.(idw)$`
 - `\.(dwg)$`
 - `\.(idw|dwg)$` Rule applies to IDW and DWG
- `/` Separator
- `PreFix-` Prefix string value: Sets a fixed text as prefix
- `<_name_>` Filename of the source file without extension (mandatory field)
- `-PostFix` Postfix string value: Sets a fixed text as prefix
- `<_ext_>` Source File Extension

6. Save the config file
7. Restart the Job Processor

Example configurations: (**note:** these should be added as 1 line of text in the config file)

1. Remove Source File Extension: *suspension.idw.pdf*:

```
<add key="DesignRepresentation.Naming" value="\.(idw)$/&lt;_name_&gt;"/>
```

2. Add a Prefix: *PreFix-suspension.dwg.pdf*:

```
<add key="DesignRepresentation.Naming" value="\.(dwg)$/PreFix-
&lt;_name_&gt;&lt;_ext_&gt;"/>
```

3. Add a **PostFix** and **Remove Extension**: *suspension-PostFix-dwg.pdf*

```
<add key="DesignRepresentation.Naming" value="\.(dwg)$/&lt;_name_&gt;;-PostFix"/>
```

4. Add a **Pre- and PostFix**: *PreFix-suspension-PostFix.idw.pdf*:

```
<add key="DesignRepresentation.Naming" value="\.(idw)$/PreFix-&lt;_name_&gt;;-
PostFix&lt;_ext_&gt;"/>
```

Note: If you want to combine rules for AutoCAD drawings and Inventor drawings you need to use following code:

1. The rule is the same for both AutoCAD and Inventor drawings:

```
<add key="DesignRepresentation.Naming" value="\.(idw|dwg)$/&lt;_name_&gt;"/>
```

2. The rule is different for AutoCAD and Inventor drawings:

```
<add key="DesignRepresentation.Naming" value="\.(dwg)$/PreFix-&lt;_name_&gt;;-
PostFix/&lt;_name_&gt;"/>
```

This one will result in:

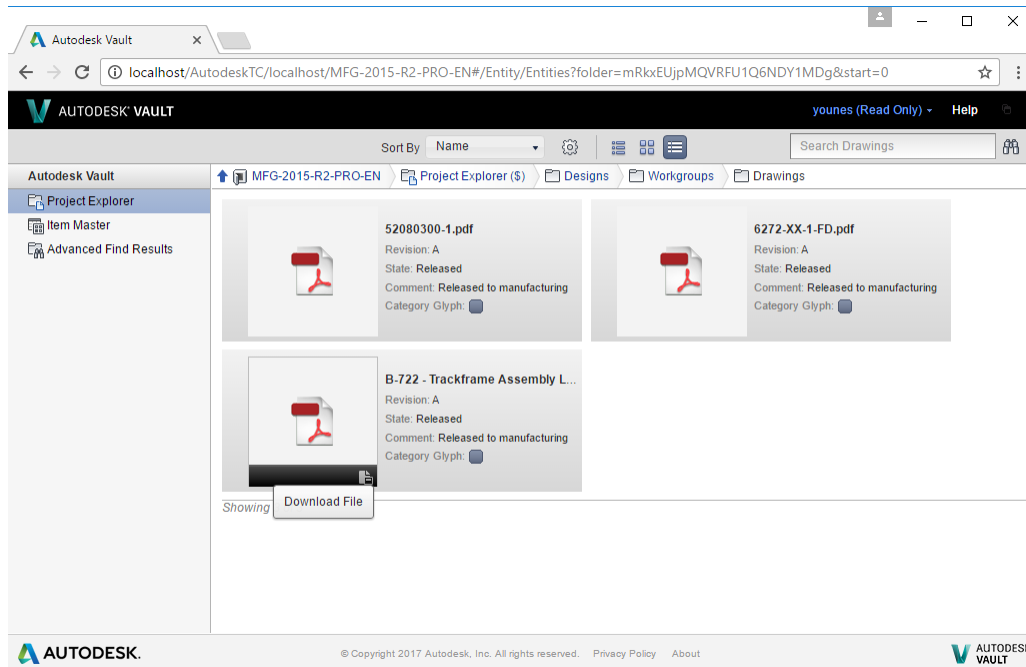
PreFix-suspension-PostFix.dwg.pdf (without extension)

PreFix-suspension-PostFix.idw.pdf (with extension)

Note: If you make an error in configuring the Naming setting, you can end up with either an error in the Job Queue or with the default naming of your pdf (e.g. drawing1.dwg.pdf)

Configuring Thin Client Access

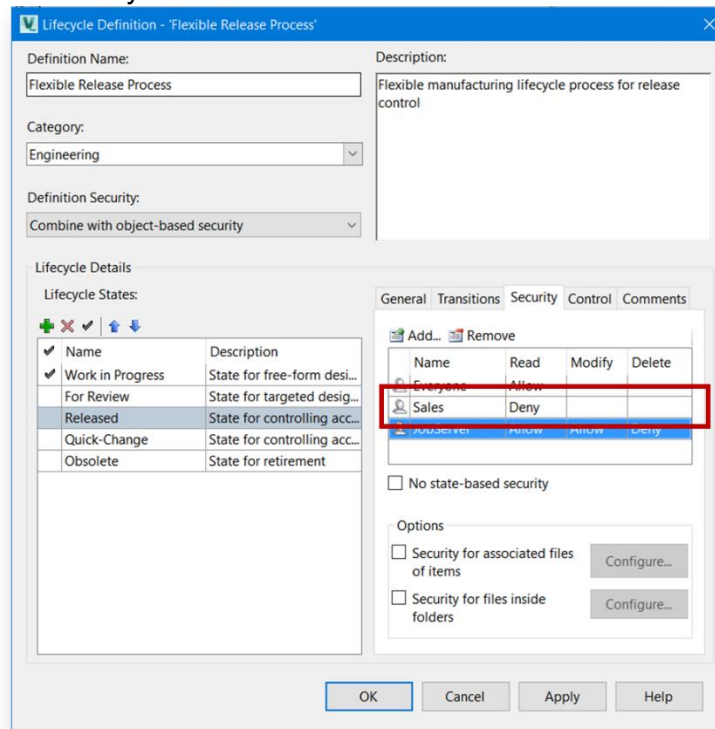
The Publish PDF capability within Vault 2018 supports engineering's team to keep non-engineering staff like shop-floor users always up-to-date. They will be able to access and search on released design representation in form of PDFs within the Vault Thin Client w/o necessary a need to have access to the native CAD files for printing and other follow workflows.



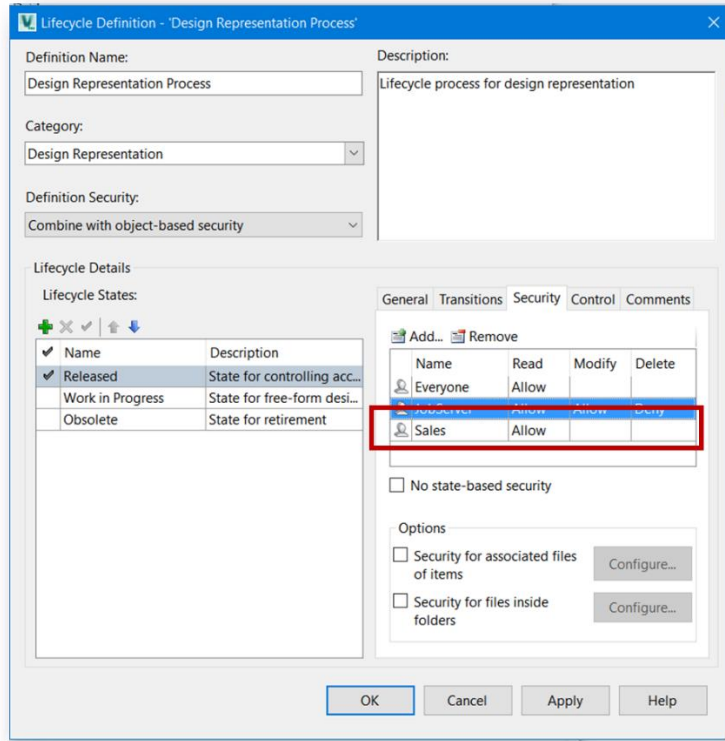
To give shop-floor users as well as other users only access to the PDF files instead of to the native CAD drawings you will need to add extra security to your files and folders.

This can be done by modifying the lifecycle definitions:

1. Set the security for the "Flexible Release Process"

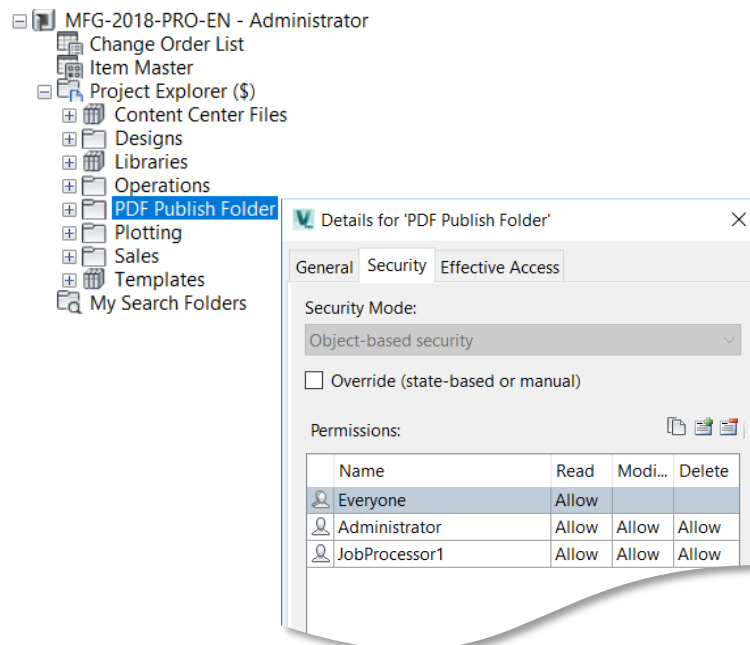


2. Set the security for the “Design Representation Process”

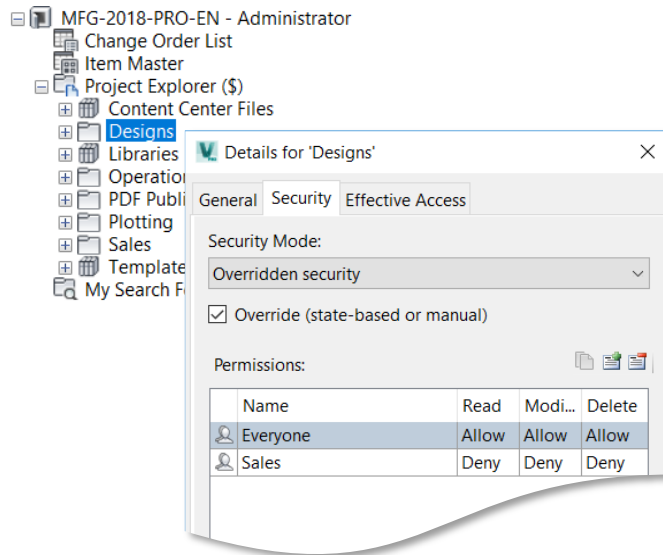


Note: look into the Lifecycle Administration section on AKN to setup the security on lifecycle states: <https://knowledge.autodesk.com/support/vault-products/learn-explore/caas/CloudHelp/cloudhelp/2018/ENU/Vault-Admin/files/GUID-088F0236-B5B7-4E35-B218-BD2D253B87F6-htm.html>

Another possible configuration could be to have your PDF files published in 1 Vault Folder. The security on this folder should be set in a way that non-engineering staff has only access to that specific folder in Vault:

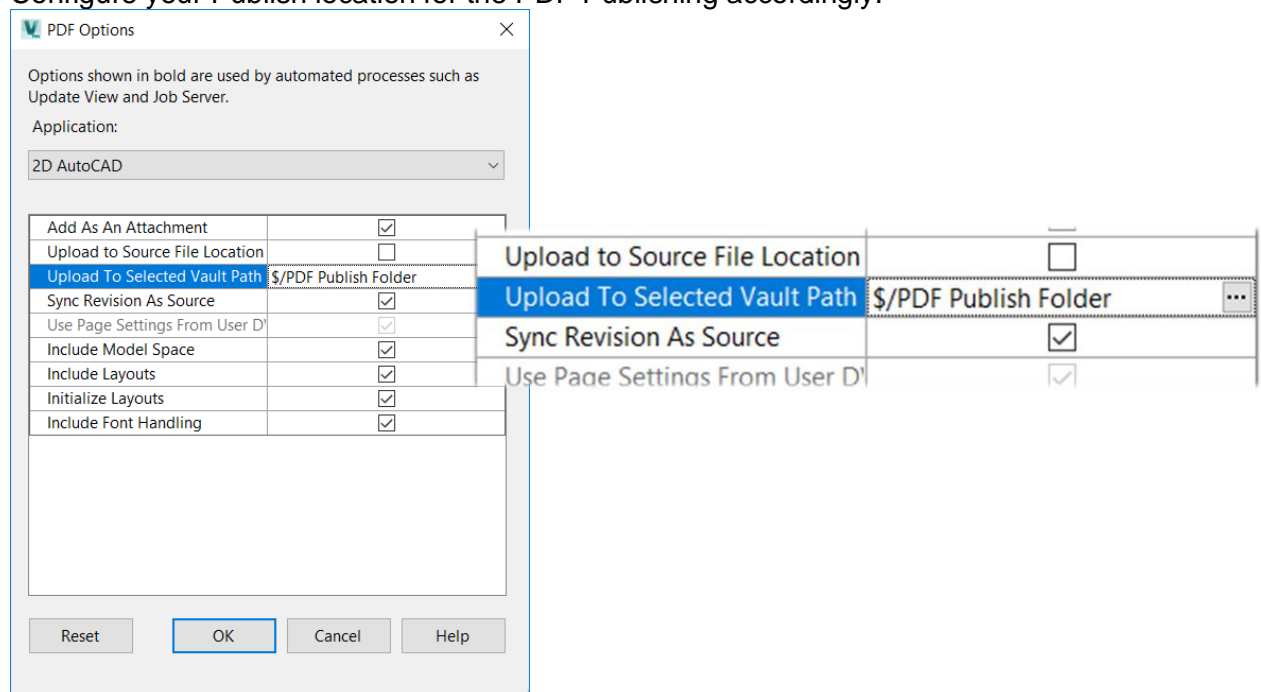


Security for the other folders needs to exclude the non-engineering staff (e.g. Sales) from accessing that location:



Note: To learn more about setting up security refer to the following AKN article: <https://knowledge.autodesk.com/support/vault-products/learn-explore/caas/CloudHelp/cloudhelp/2018/ENU/Vault-Admin/files/GUID-07AB6615-AFDD-4C86-96DE-A3D334AF454B-htm.html>

Configure your Publish location for the PDF Publishing accordingly:



References

- Configure PDF Publishing Options:
<https://knowledge.autodesk.com/support/vault-products/learn-explore/caas/CloudHelp/cloudhelp/2018/ENU/Vault-Admin/files/GUID-8EE12D8F-2381-4EE1-BAB0-D080F692500B-htm.html>
- Publish PDF from 2D CAD Files:
<https://knowledge.autodesk.com/support/vault-products/learn-explore/caas/CloudHelp/cloudhelp/2018/ENU/Vault-Admin/files/GUID-F05BFEAF-A362-4070-BBA6-F3A74602967E-htm.html>
- Job Processor Administration:
<https://knowledge.autodesk.com/support/vault-products/learn-explore/caas/CloudHelp/cloudhelp/2018/ENU/Vault-Admin/files/GUID-41C25A0B-81DC-4E5B-B98B-3EA7B280CD97-htm.html>
- Lifecycle Administration:
<https://knowledge.autodesk.com/support/vault-products/learn-explore/caas/CloudHelp/cloudhelp/2018/ENU/Vault-Admin/files/GUID-088F0236-B5B7-4E35-B218-BD2D253B87F6-htm.html>
- Renaming PDF Files in Detail:
<http://underthehood-autodesk.typepad.com/blog/2017/07/renaming-pdf-files-in-detail.html>
- Indexing properties from Adobe PDF files in Vault:
<https://knowledge.autodesk.com/support/vault-products/learn-explore/caas/simplecontent/content/indexing-properties-adobe-pdf-files-vault.html>
- Using Vault Data Standard:
<https://knowledge.autodesk.com/support/vault-products/learn-explore/caas/CloudHelp/cloudhelp/2018/ENU/Vault-General/files/GUID-D475D22B-3873-4B78-9936-DD773F109136-htm.html>
- Vault 2018 - PDF Design Representation - Submit Job on Legacy Files:
<https://knowledge.autodesk.com/community/article/115436>
- Configure Security for Files, Folders, and Custom Objects:
<https://knowledge.autodesk.com/support/vault-products/learn-explore/caas/CloudHelp/cloudhelp/2018/ENU/Vault-Admin/files/GUID-07AB6615-AFDD-4C86-96DE-A3D334AF454B-htm.html>
- Autodesk Vault Thin Client:
<https://knowledge.autodesk.com/support/vault-products/learn-explore/caas/CloudHelp/cloudhelp/2018/ENU/Vault-General/files/GUID-A394FD9E-88EB-4592-B6F9-B41D31C14F7D-htm.html>