

Hitchhiker's Guide to Property Management



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Assumptions

- Have a basic understanding of Property Administration
- Class primarily aimed at Vault Administrators
- Main focus of class is File Properties

Class summary

Property Management

- Property Administration
- Using Properties
- Property Compliance
- Indexing Properties

Handout

- Covers everything discussed in this presentation
- Contains more detailed information
- ePub format available

Key learning objectives

At the end of this class, you will be able to:

- Have a better understanding of Property Administration
- Have a better understanding of Property Compliance
- Have a better understanding of Property Indexing

Property Administration

Property Overview

Types of Property

- System
- User Defined

Supported Data Types

- Text
- Number
- Boolean
- Date

Property Overview

Supported Objects:

- Files
- Items
- Folders
- Change Orders
- Custom Objects
- Reference Designators

Also Support for:

- BOM Properties
- Change Order Link Properties

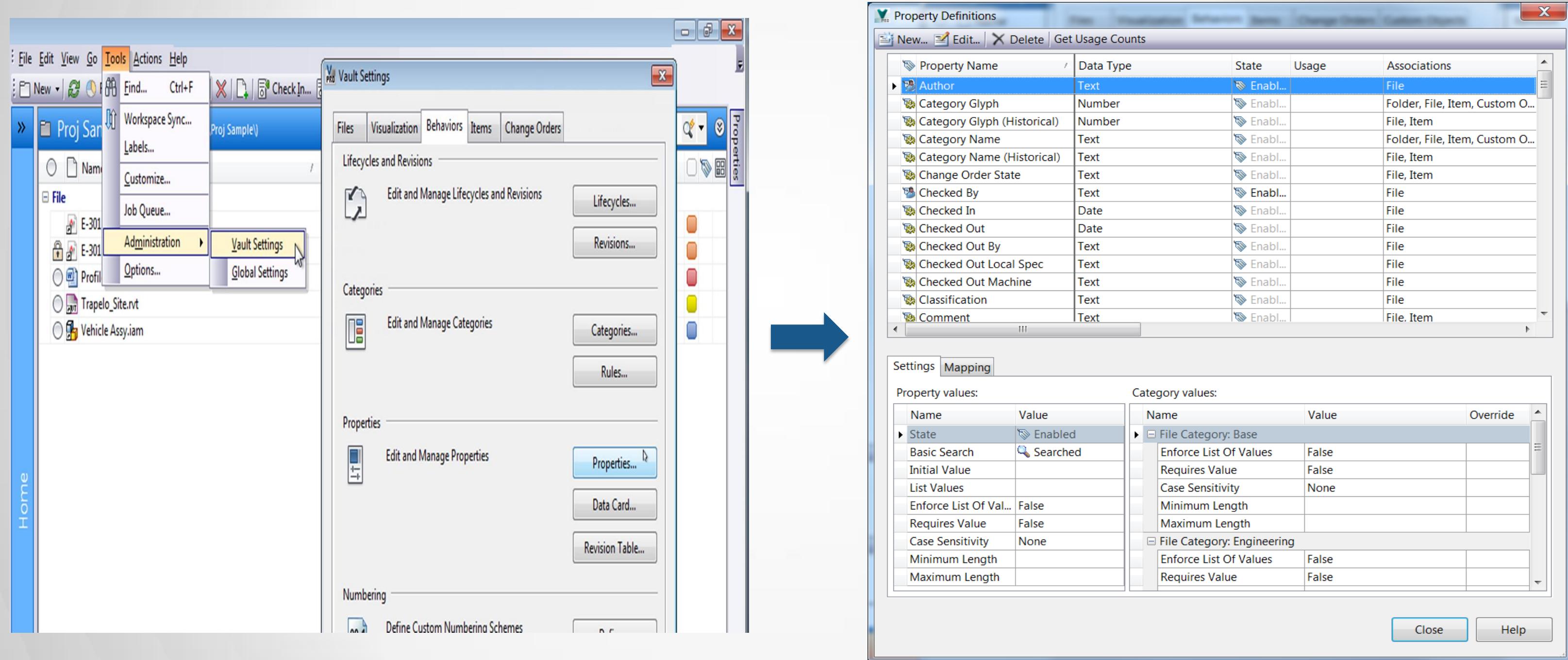
For more on BOM Properties:

Class PL6547 - All You Want to Know About Items in Vault Professional

Taught by William Schwerin and Anil Chintamanen

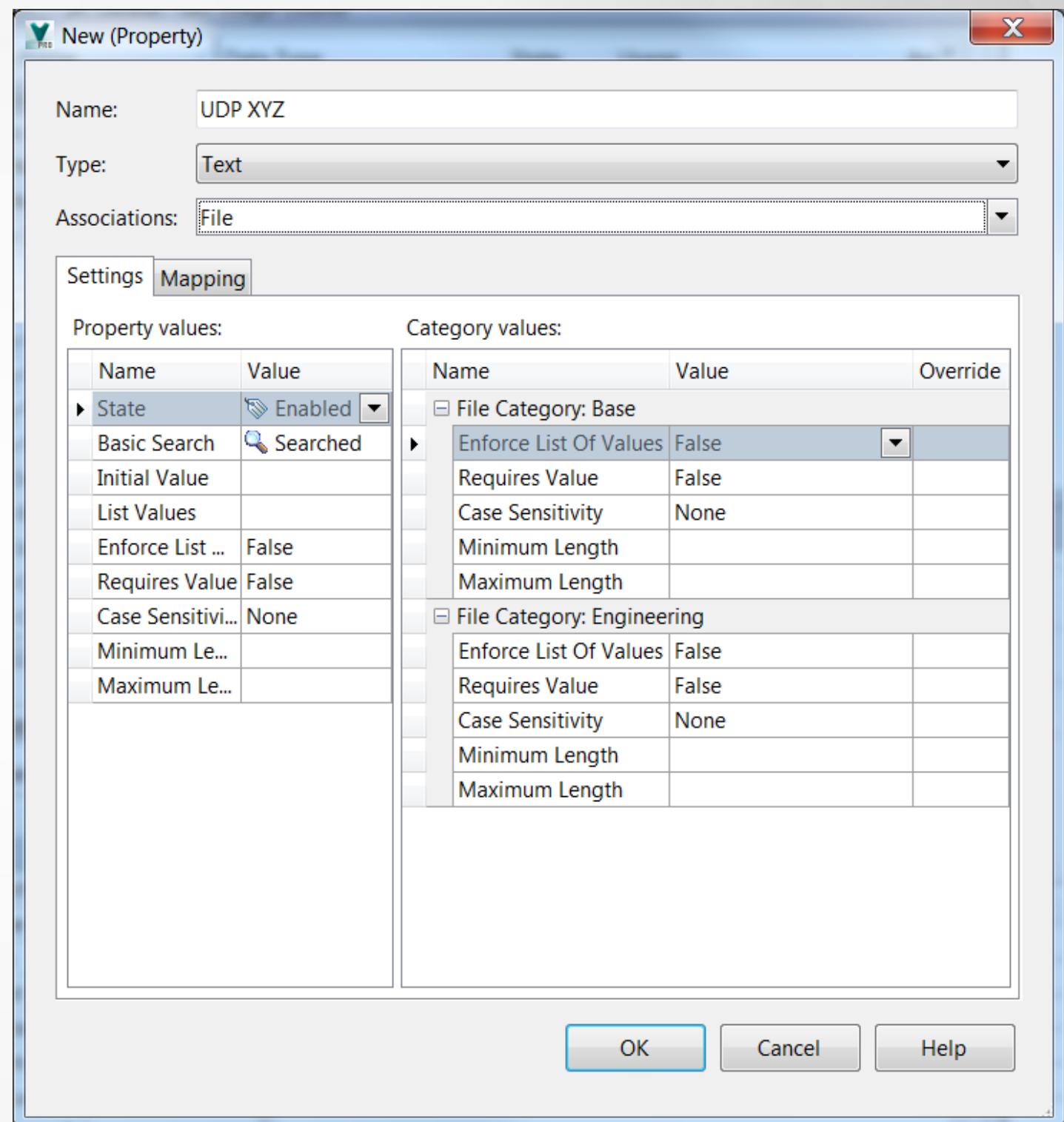
Thursday Dec 4, 10:00 AM - 11:30 AM

Property Administration



Property Creation

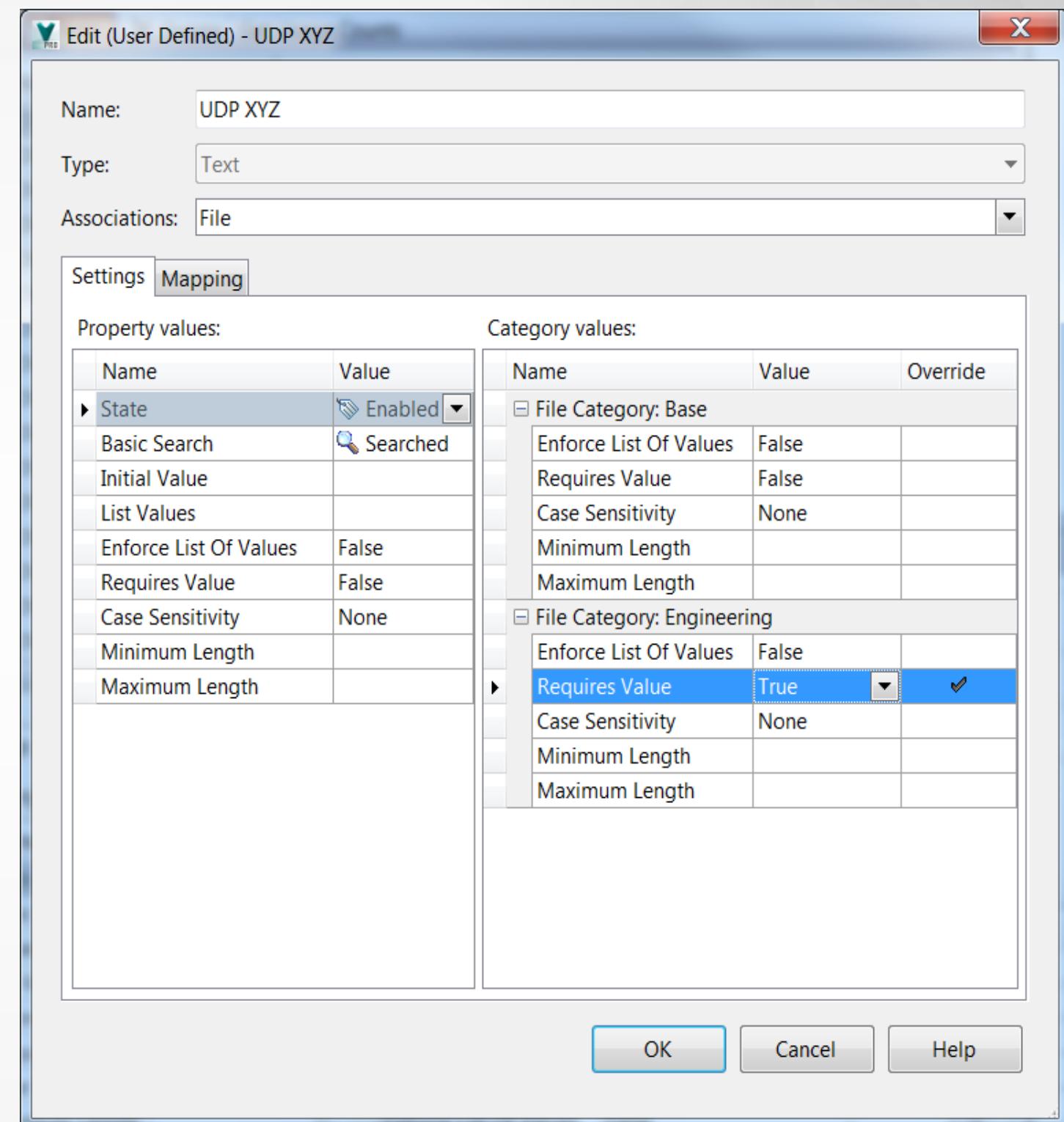
- Only User Defined Properties (UDPs) can be created
- Category Association automatically adds Property to a File
- No category Association – user must add Property manually to a File



Property Settings

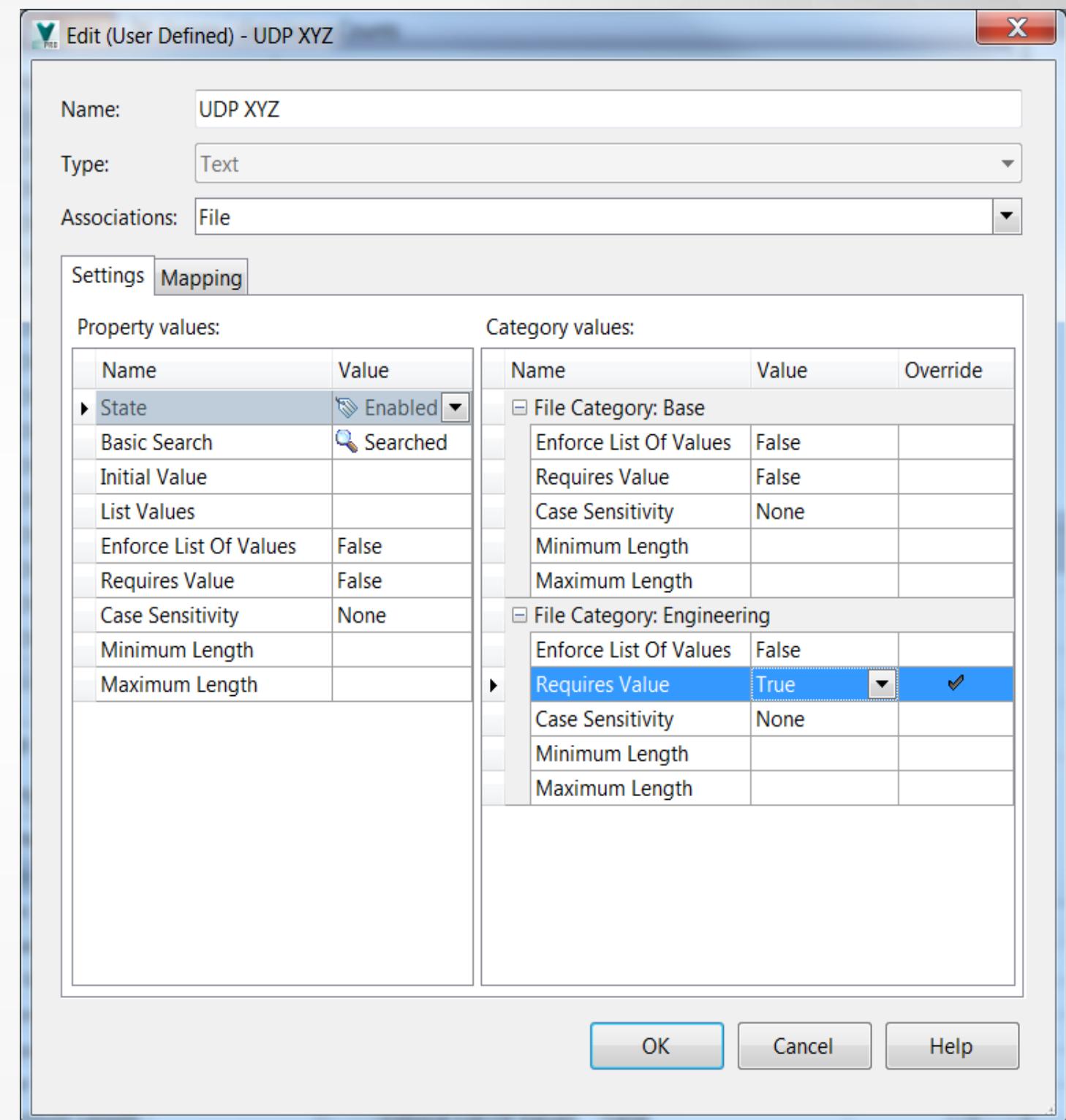
Basic Settings

- State
- Basic Search
- Initial value
 - Static, Mapped
- List Values
 - Text, Number Data Types



Property Policy Settings

- Enforce List of Values
- Requires Value
- Case Sensitivity
- Minimum Length
- Maximum Length
- Override by Category
- Used in Property Compliance evaluation - Policy



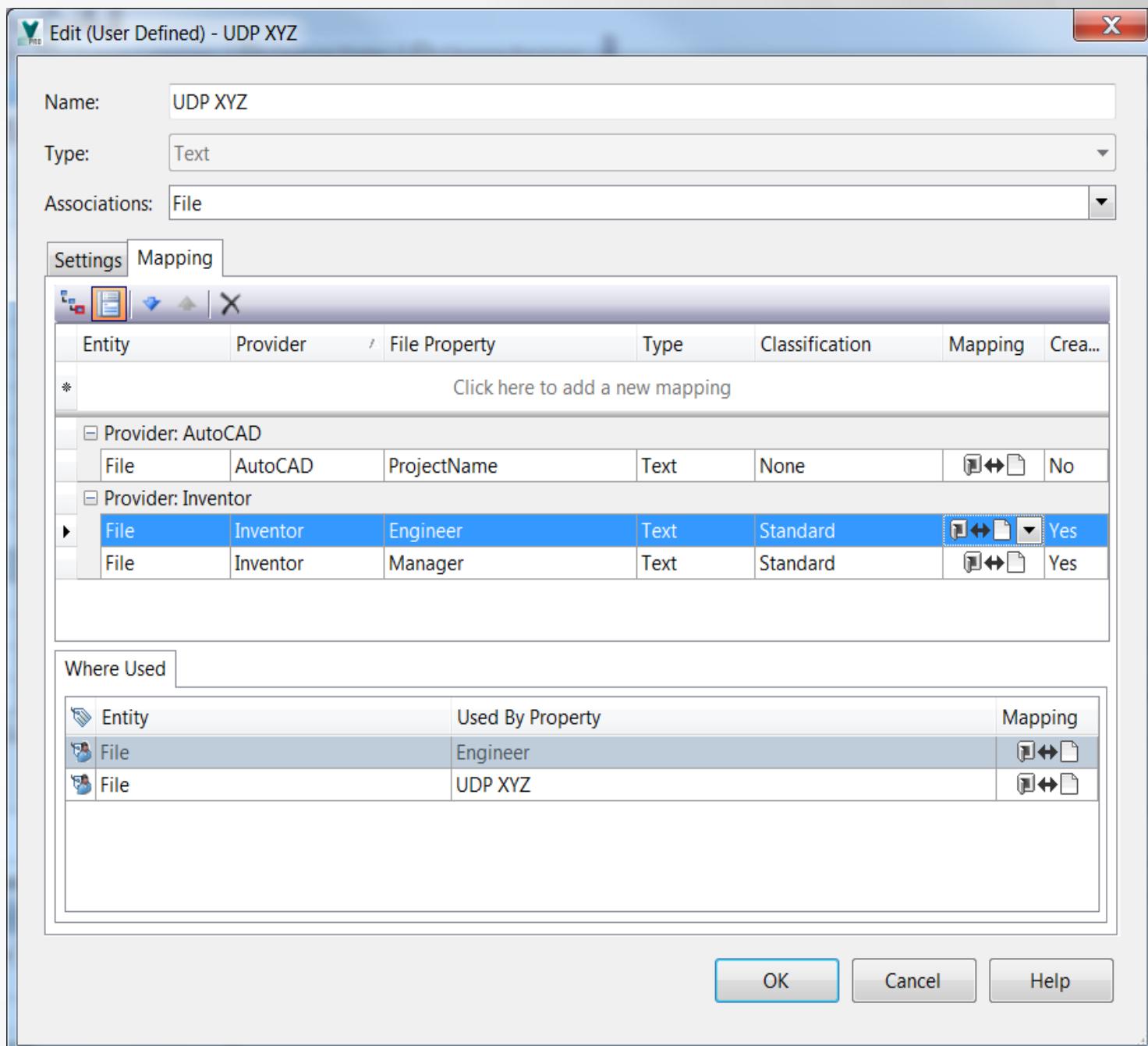
Property Mappings

- Create the required Read and Write Mappings

- ➡ Read Only
- ➡ Write Only
- ➡ Read & Write (default)

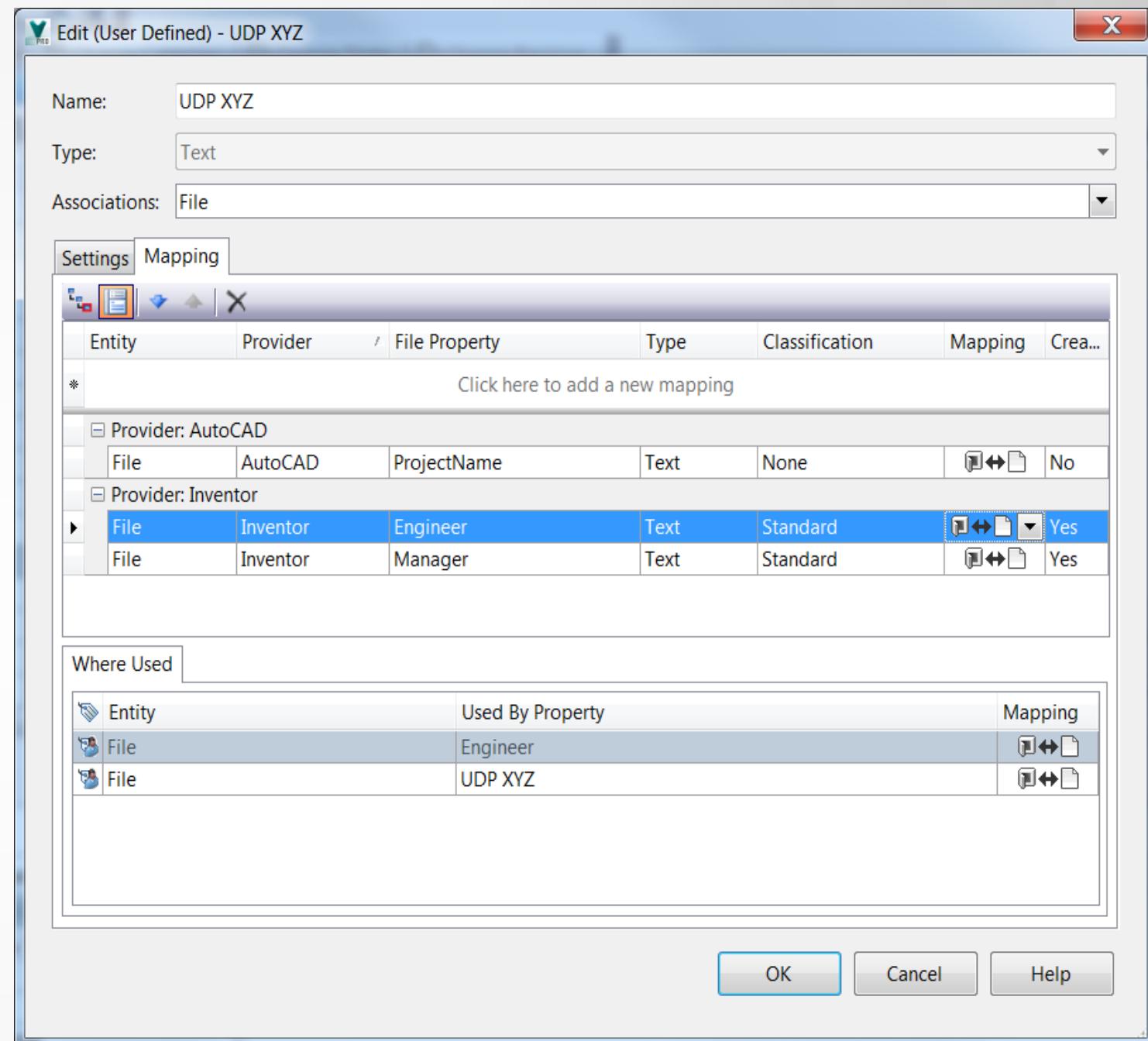
- UDP mapped to a File Property

- File properties extracted from a file on disk or from the vault



Content Providers

- “Provide” the File Properties used for mappings
- Write Mapping enabled if Provider supports write back
- Pre-Configured Providers installed:
AutoCAD, Inventor, Office, Revit, etc.
- Ifilter used if no Provider



Property Mappings

- Mappings are listed in “Read” Priority Order

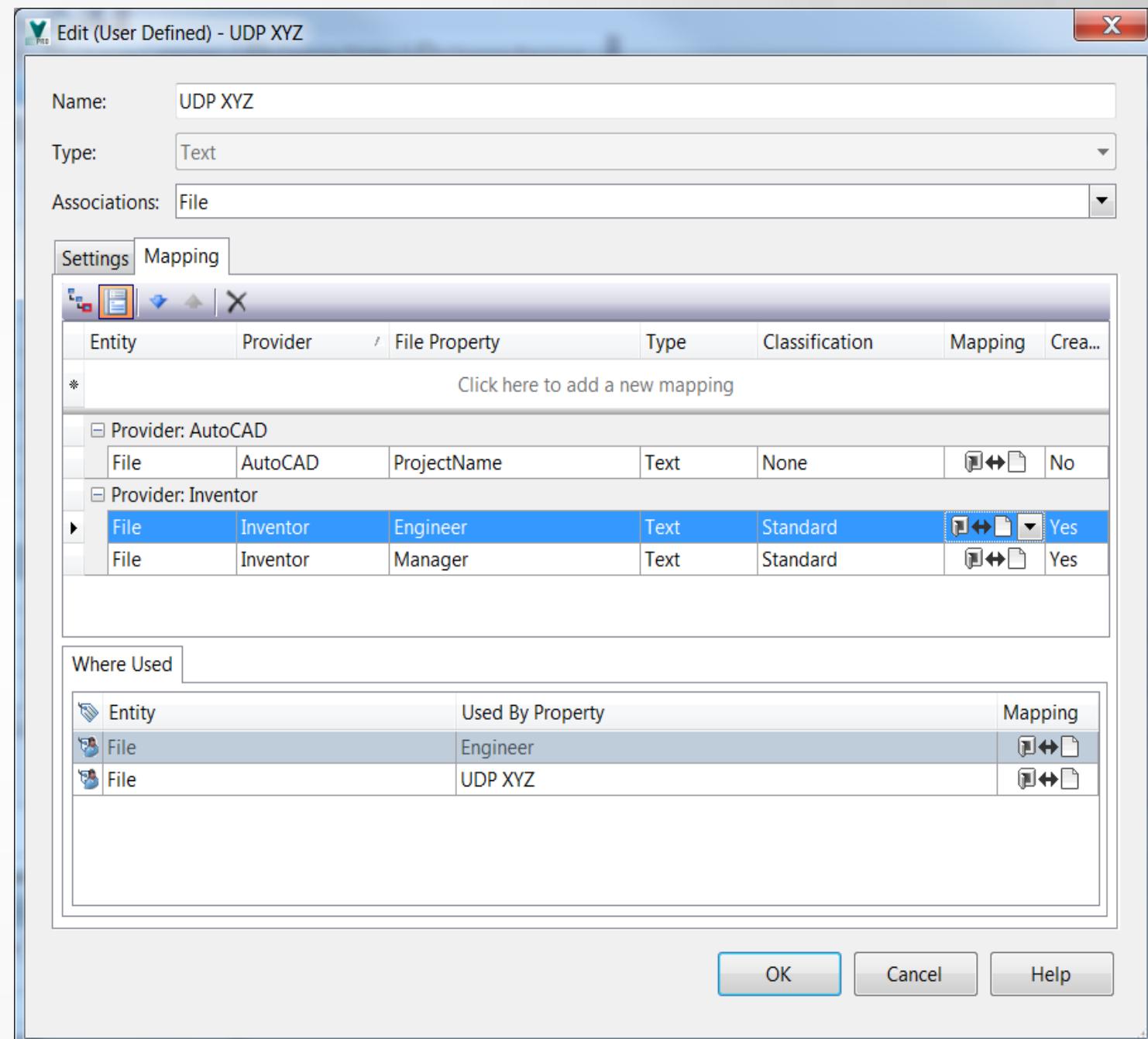
- Read Mappings processed in priority order

Engineer->Manager
if no value

Initial Value Mapping*

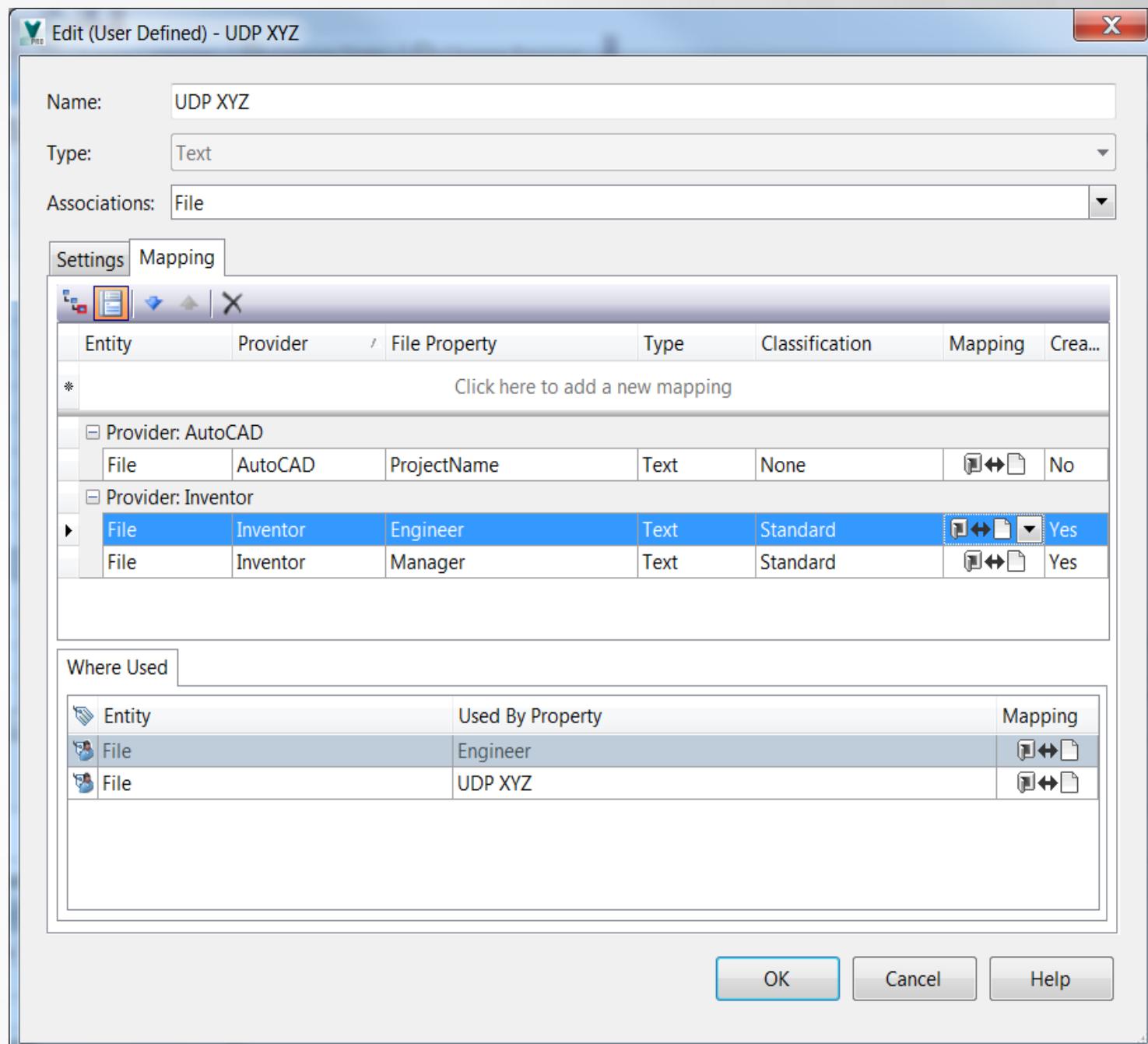
Initial Value*

*only used for initial creation



Property Mappings

- Where Used displays the Write Mappings for the selected File Property
- Mappings are listed in “Write” Priority Order
- Create Option only for Write Mappings



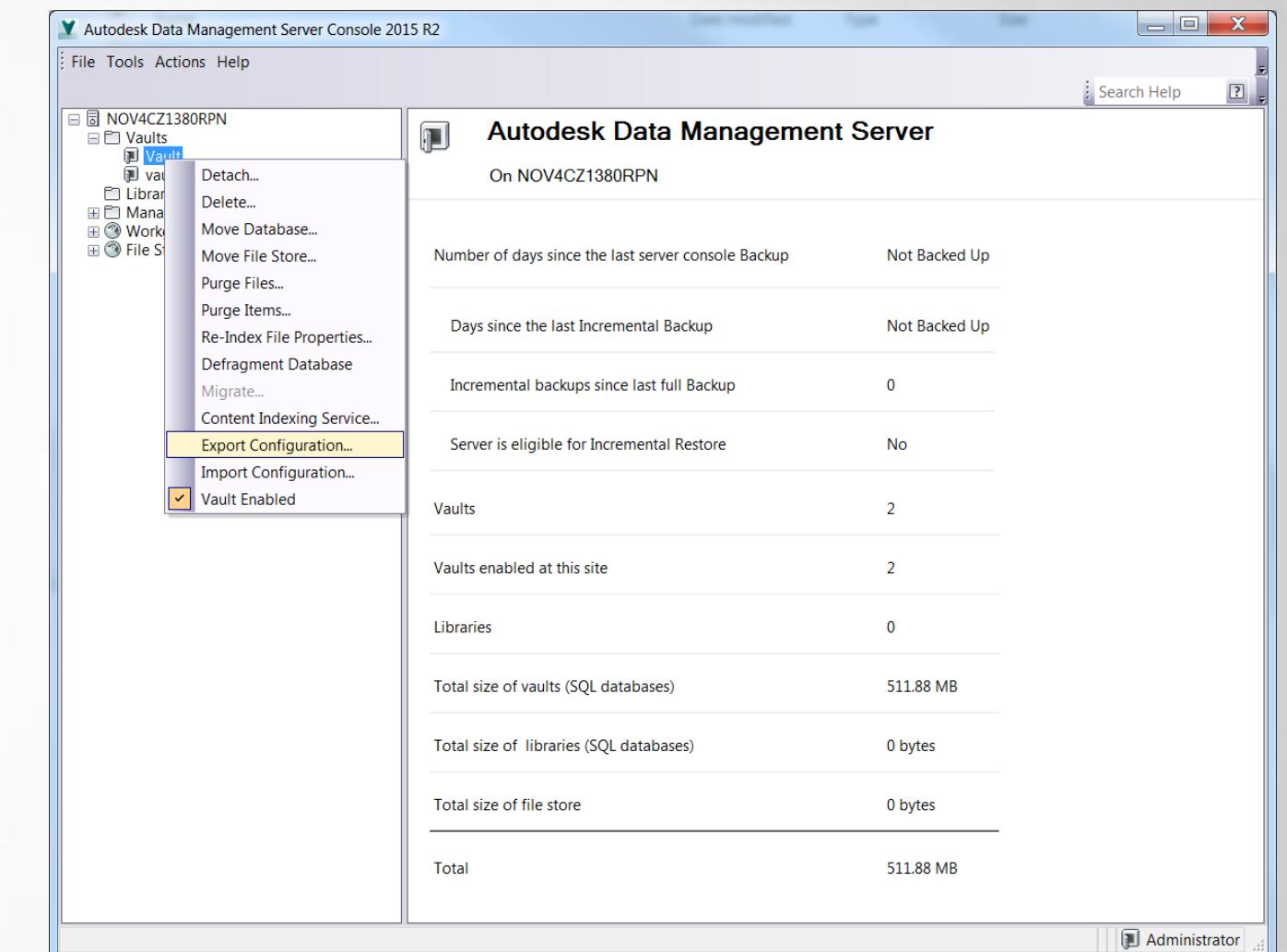
Property Mappings

- Used in Property Compliance evaluation
 - Equivalence Compliance
 - Both Read and Write Mappings are evaluated

Export/Import Property Definitions

Export Vault Configuration

- Exports Property Definitions
- Includes Settings and Mappings
- Exports the other behaviors



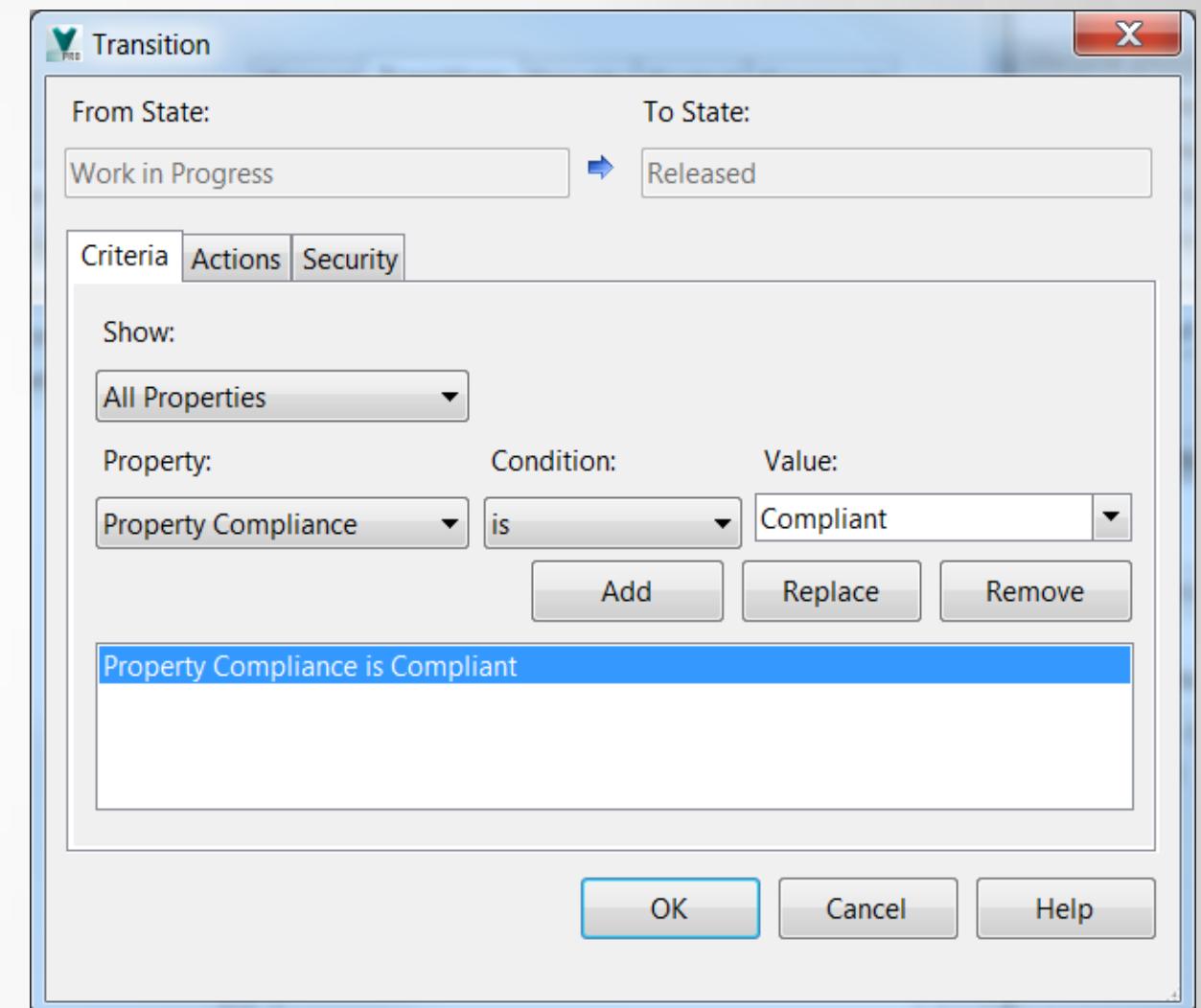
Import Vault Configuration

- Imports Property Definitions
- Includes Settings and Mappings
- Imports the other behaviors

Using Properties

Property Usage

- Basic Search
- Advanced Search
- Data Card Configuration
- Category Assignment Rules
- Life Cycle State Transition Criteria Rules



What happens when a File is added

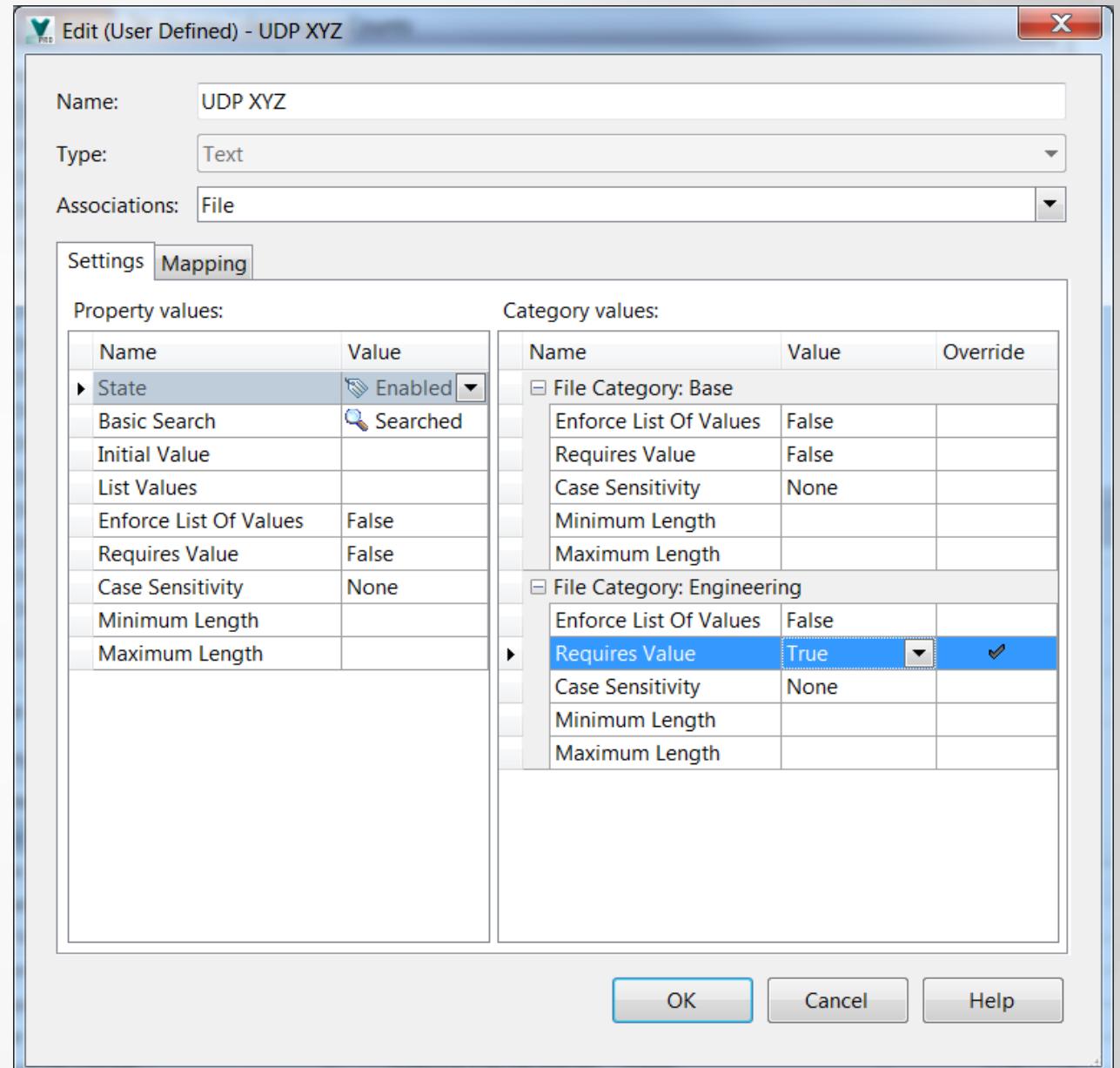
- Indexed and Properties extracted
- Read Mappings, Initial Values are applied to all UDPs
- Assigned a Category based on category assignment rules
- Adds UDPs by associated with this Category
- Property Compliance is evaluated on the file's properties
- Search Indexes built (in background)

Property Administration Demo

Property Compliance

Policy Compliance

- Policy configured in Settings section of Property Definition
- Evaluated for Files, Items, Folders and Custom Objects
- If in violation, a warning symbol adjacent to this property value will be displayed



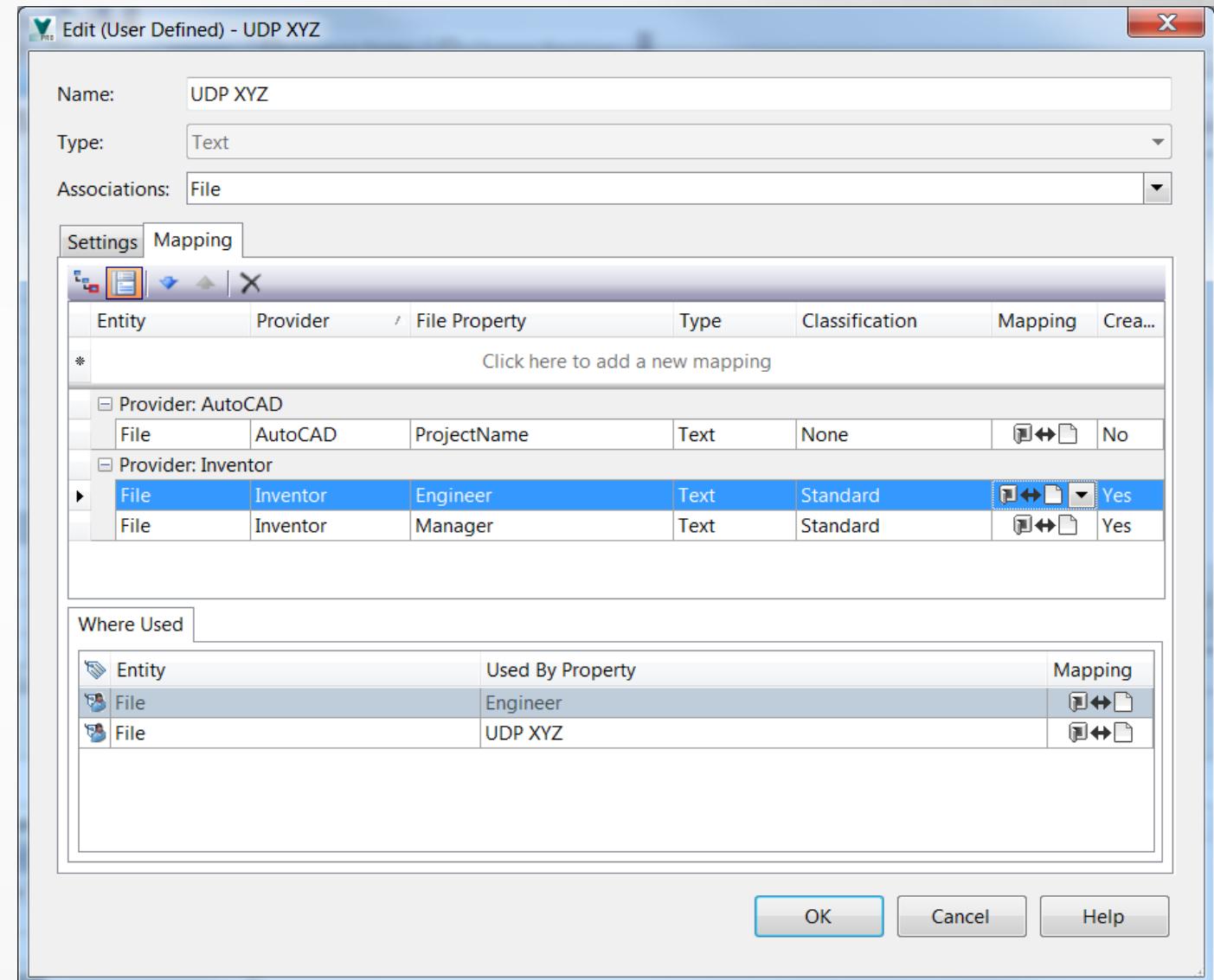
Equivalence Compliance

- Evaluated for Files only
- Equivalence ensures that the derived File Property and UDP values match
- Both Read and Write Mappings are evaluated
- If in violation, a warning symbol adjacent to this property value will be displayed

Equivalence Compliance

Read Mappings

- Provider Property Mappings processed in priority order
Engineer-> Manager
- If no value, the empty value is used
- This is then compared against the UDP value (UDP XYZ)



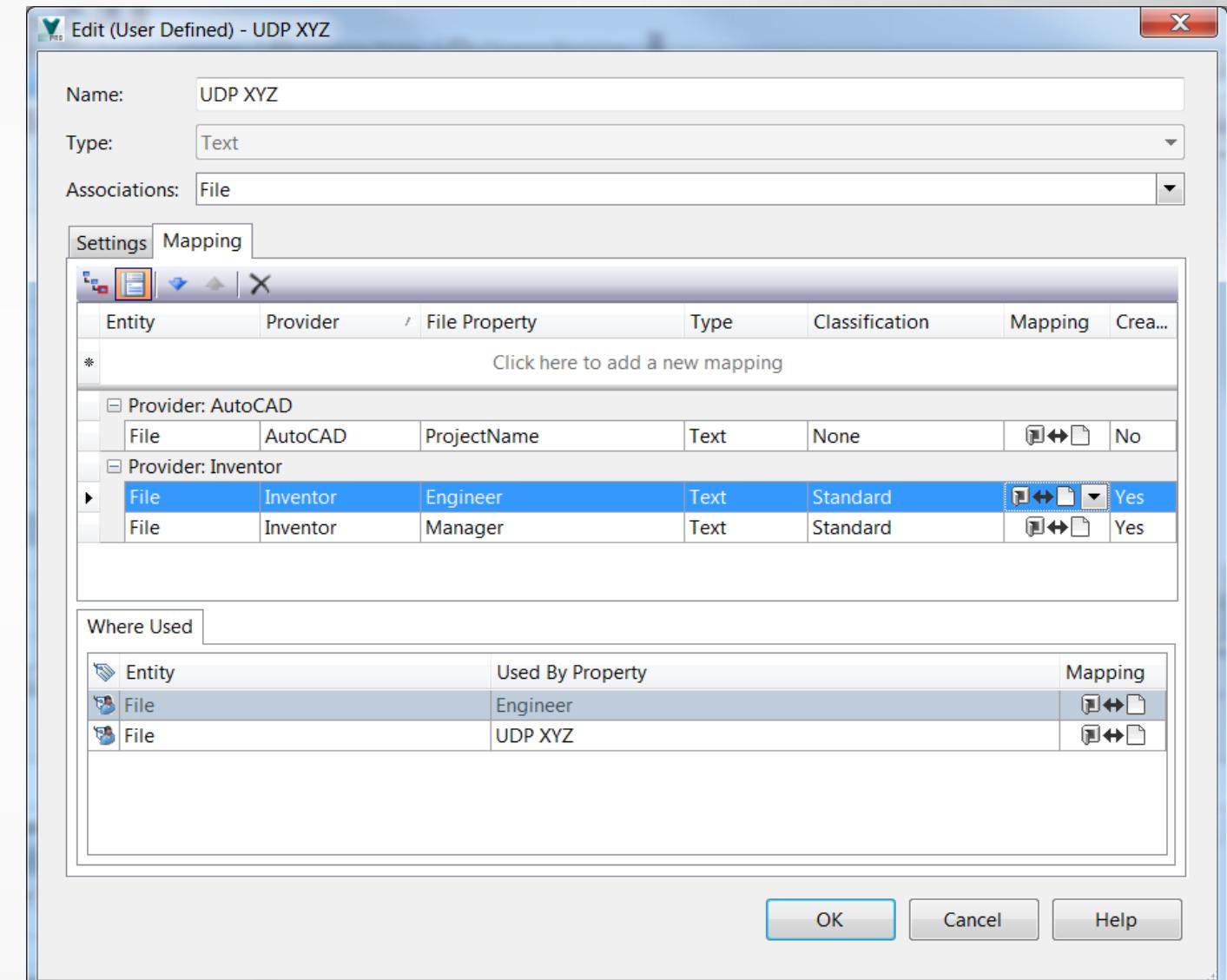
Equivalence Compliance

Write Mappings

- UDP Mappings processed in priority order

Engineer-> UDP XYZ

- If no value, the empty value is used
- This is then compared against the File Property (Engineer)



Equivalence Compliance

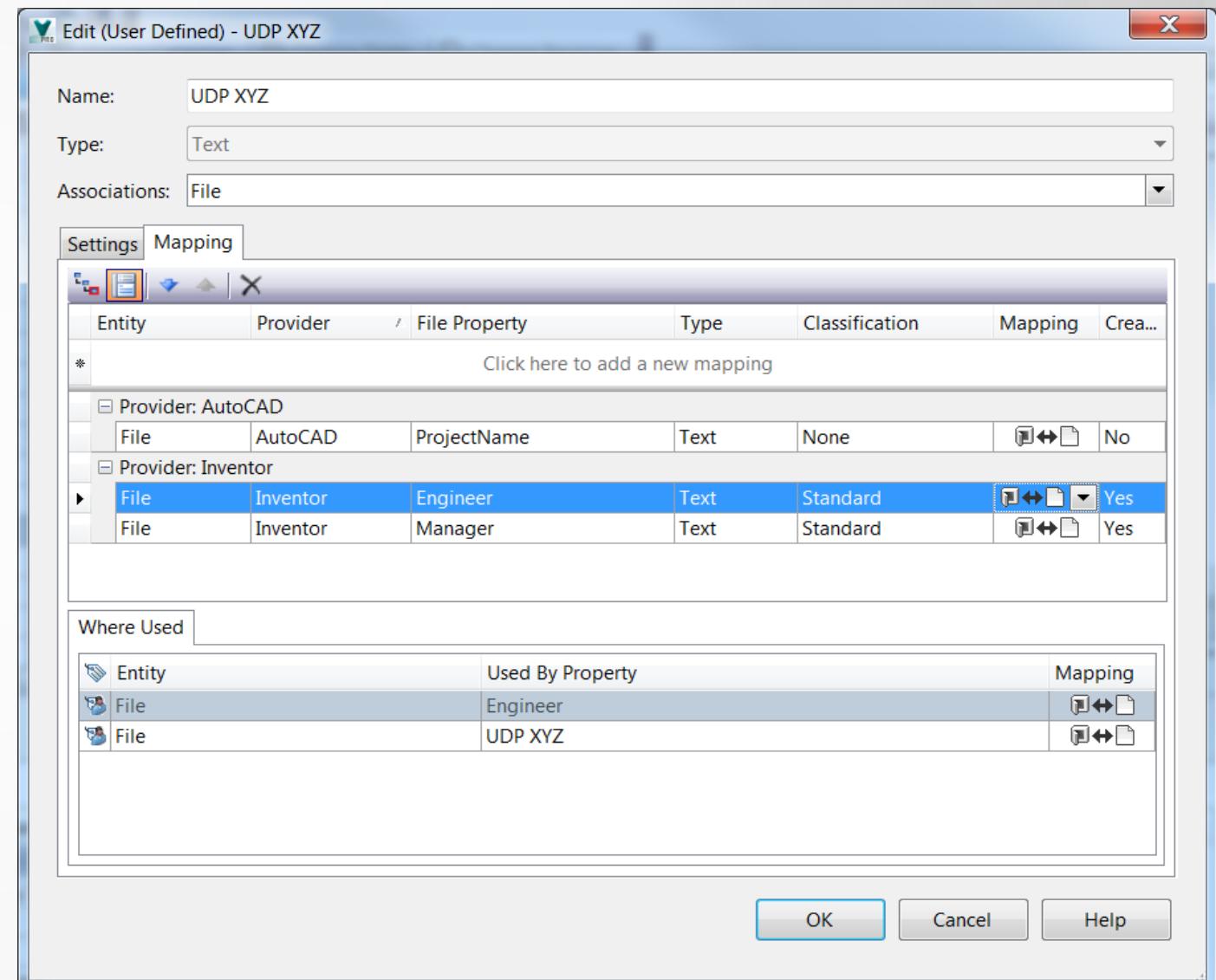
Write Mappings – Use of “Create”

Create = true

- Absence of the property in the file treated as a blank value and compared against the value of the UDP

Create = false

- Equivalence will only be evaluated if file property value exists



When property compliance is evaluated

- Immediately when the changes to an object are committed to Vault.
 - e.g. Add/Check In of a file

Queued for Evaluation

- Property Definition modified by the user
 - All objects associated with this Property Definition are queued
- Evaluation executed by ADMS Server in the background
- Queued objects will have the Pending icon  displayed

How to resolve Compliance Violations

Policy failure

- Edit UDP to be compliant
- Read only Mapping: Modify the File property (or change Policy configuration)

Equivalence failure:

- Write Mapping Failures: Edit Property or Synchronize Properties
- Read Mapping Failure: Property File Re-Index or next Check In.

Property Compliance Demo

Indexing Properties

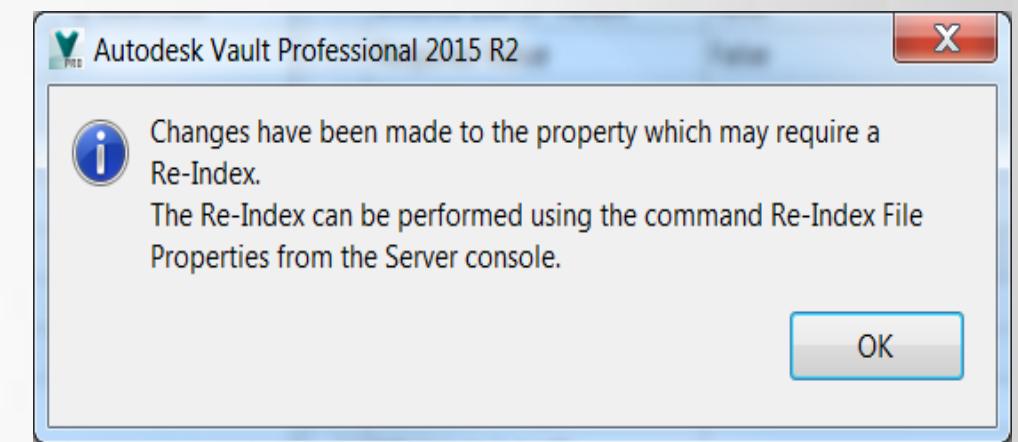
Types of Indexing

- Property File Re-Indexing
- Search Indexes
- Full Content Indexing

Property File Re-Index

When

- A Read Mapping has been added/modified to an existing UDP
- A property with Read Mappings has been re-enabled



These property changes queue a property Compliance check

- number of files can become non-compliant

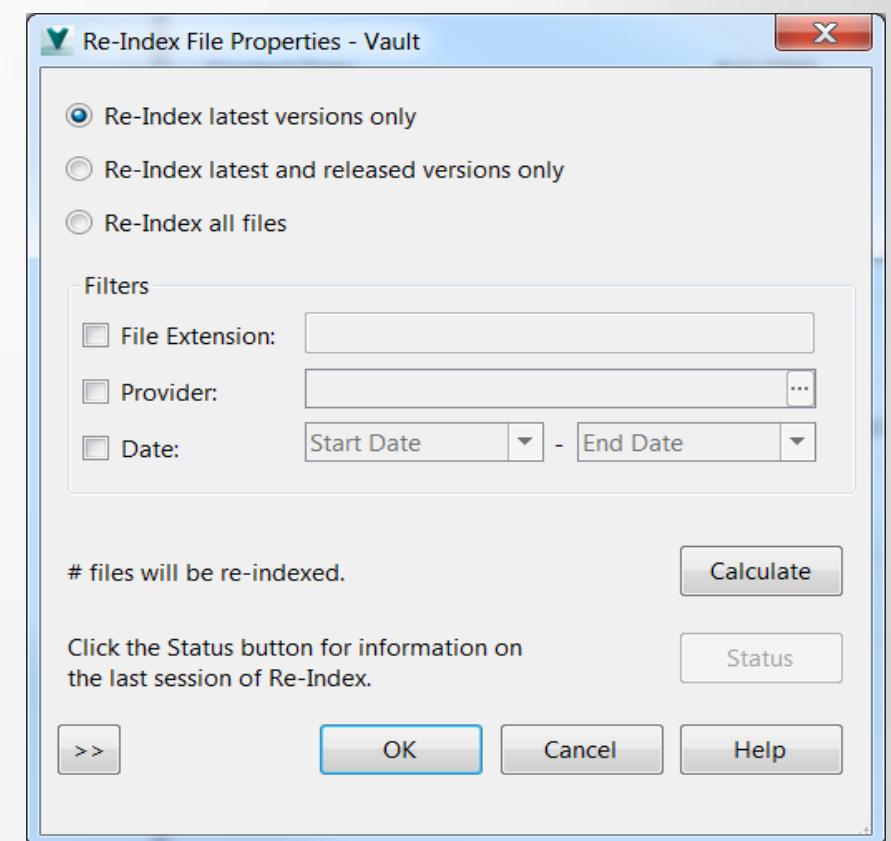
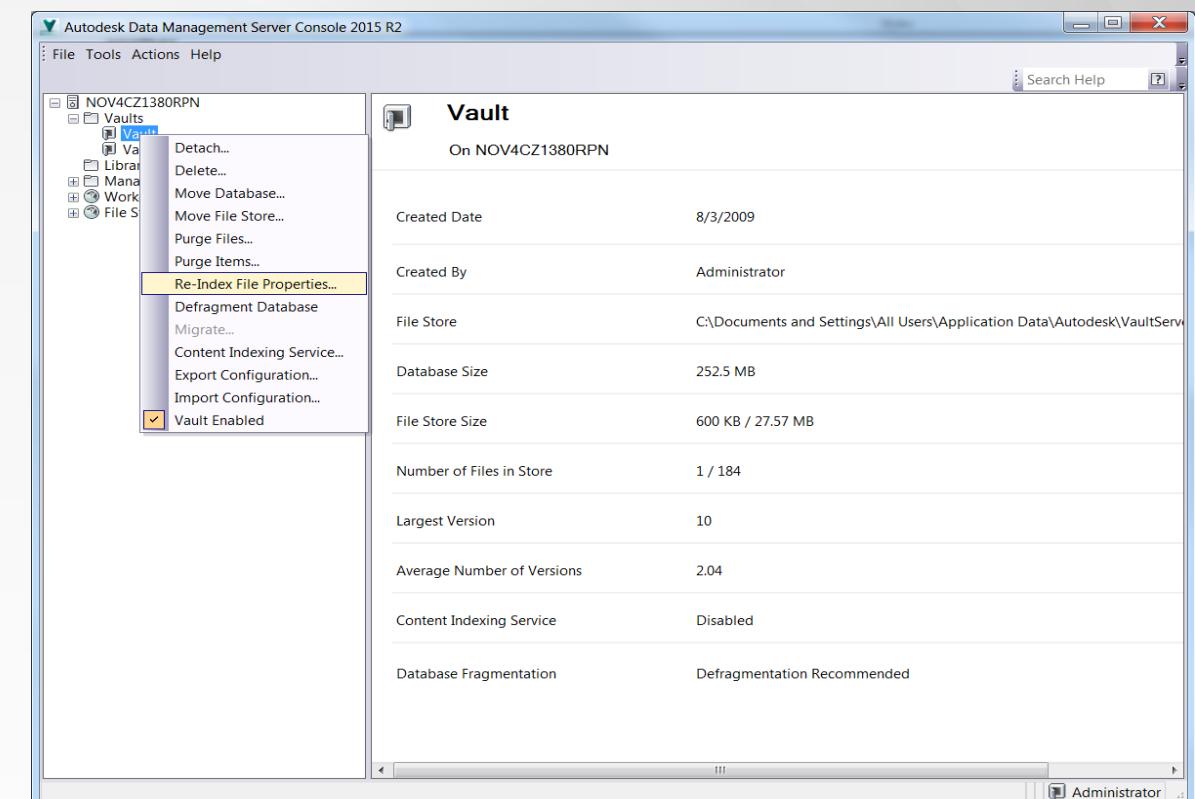
Property File Re-Index

Executed from within ADMS Console

What it Does

- Re-applies the Read Mappings and updates the UDP values for each file
- Updates existing versions of the files
- UDPs will be become property compliant
- Search indexes built for the property values

A Property File Re-Index does **not add** newly created UDPs



Property File Re-Index Enhancements in 2013

- Removal of Redundant Re-Indexes
- General Re-Index Performance

Example:

- 1 Million files in the Vault
- Read Mapping added to existing UDP
- UDP only used by 5K files

Pre-2013 Property File Re-Index

- 1 Million Files will be re-indexed
- Each file is physically re-indexed – file is retrieved from file store and indexed
- File Property table updates for each file (60-80 rows)
- Can take a lot of hours to complete
- Once complete, an administrator can start another Property File Re-Index even if none is required -> the same 1 Million Files will be re-indexed

2013-Present Property File Re-Index

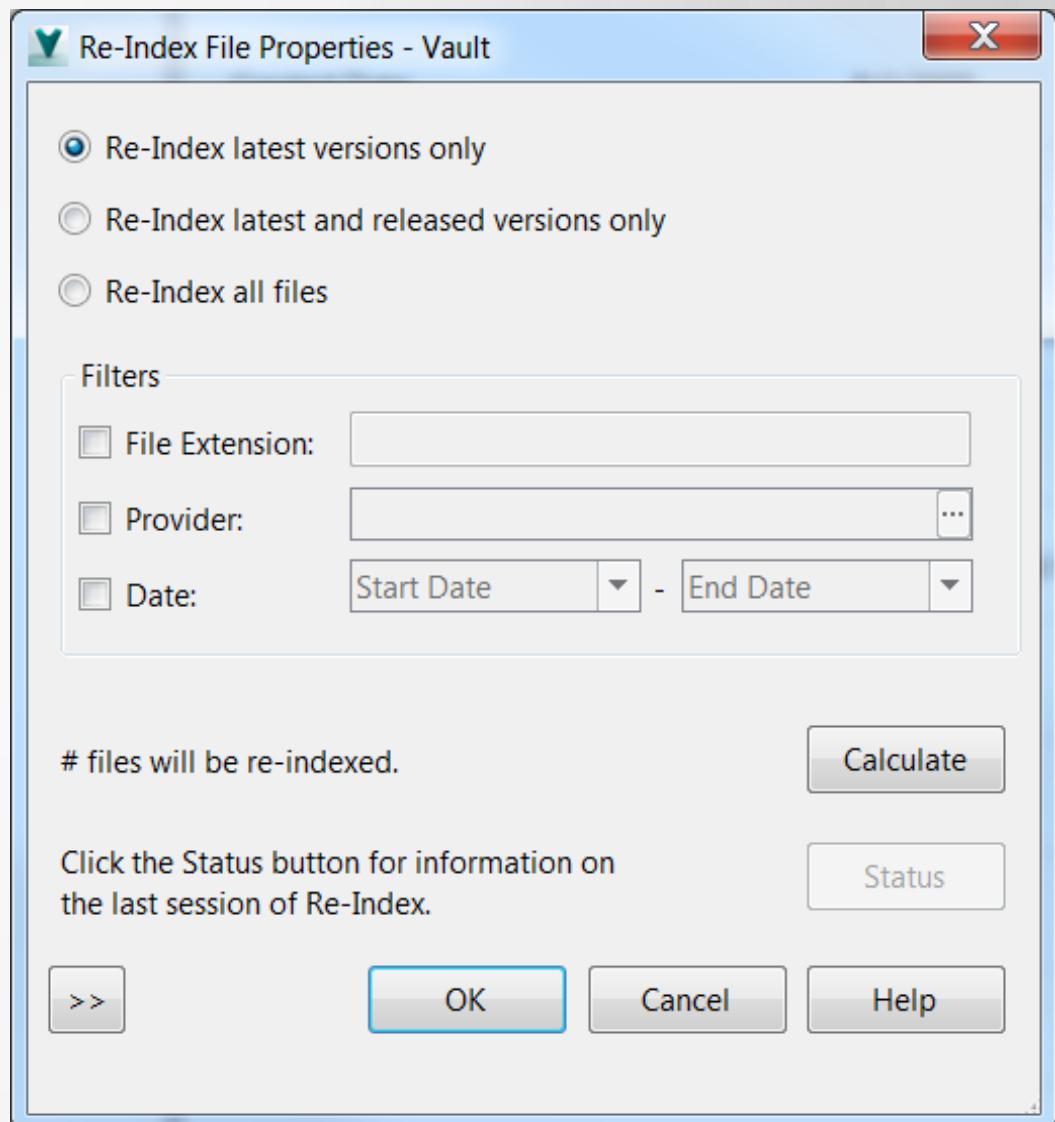
- Only files that require a re-index are re-indexed
 - Only 5K files will be re-indexed
 - No redundant re-indexes
- Tip versions make use of the File Property table
 - Tip versions of files are no longer physically re-indexed
 - No File Property table updates
- Once complete, an administrator will be informed that there are no files that require a re-index

Property File Re-Index Enhancements

Filtering (2013)

- File Extension
- Content Provider
- Date Range

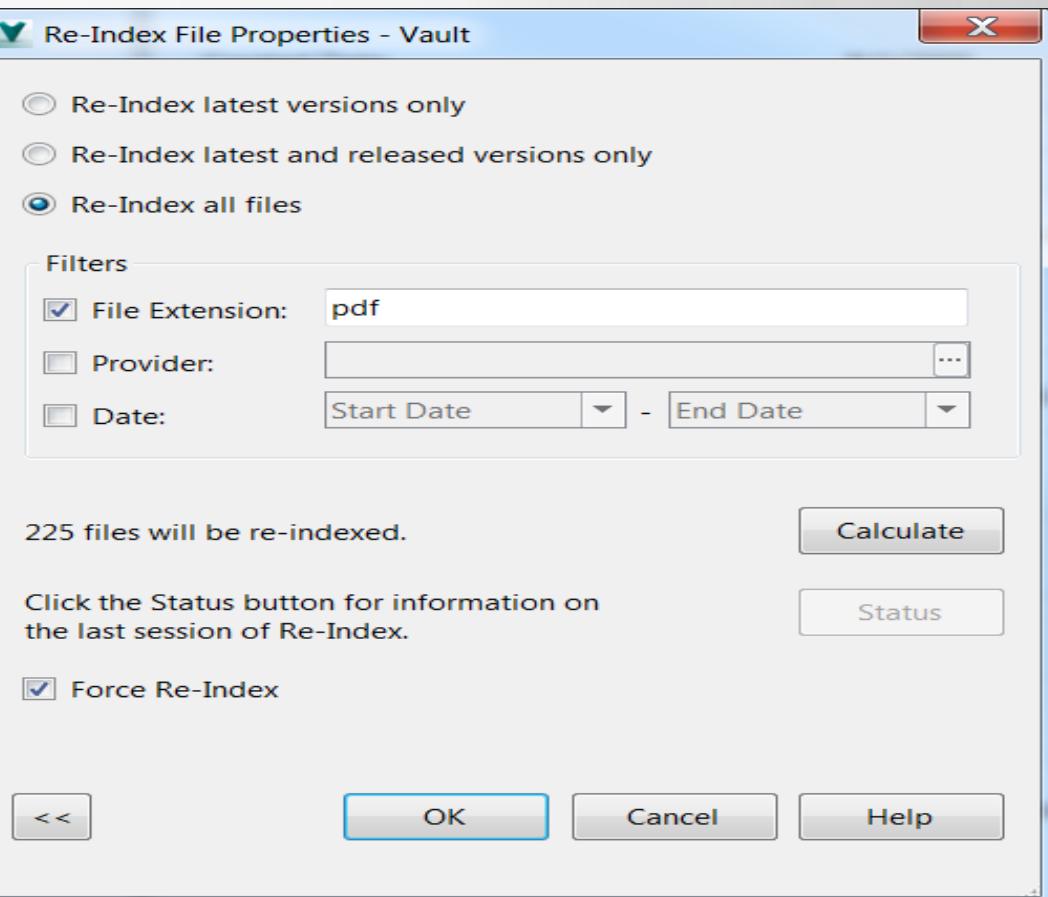
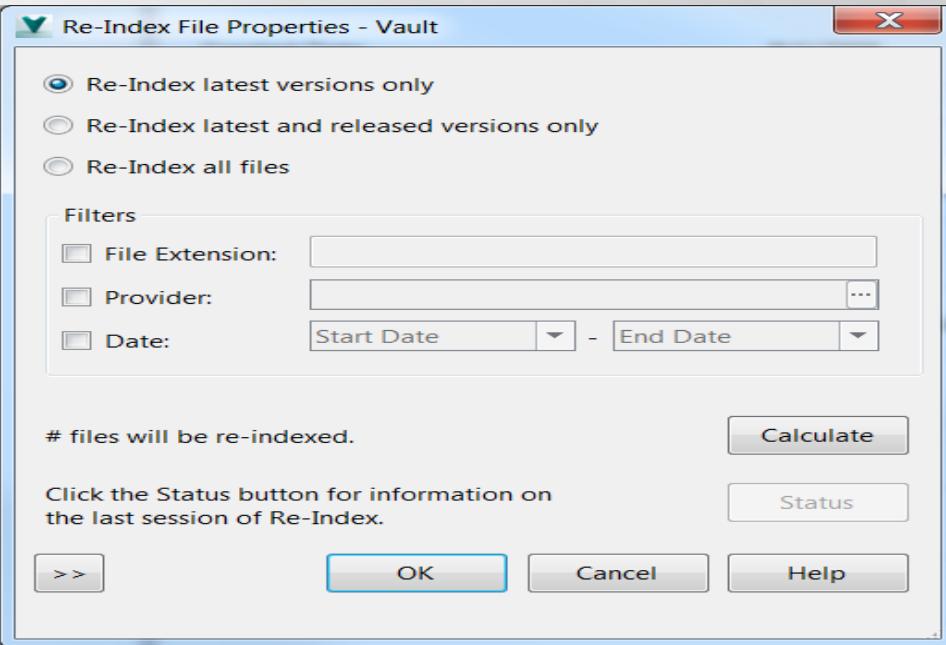
Re-index latest versions only
(Vault 2015 R2)



FORCE option in Property File Re-Index

Force option (2013):

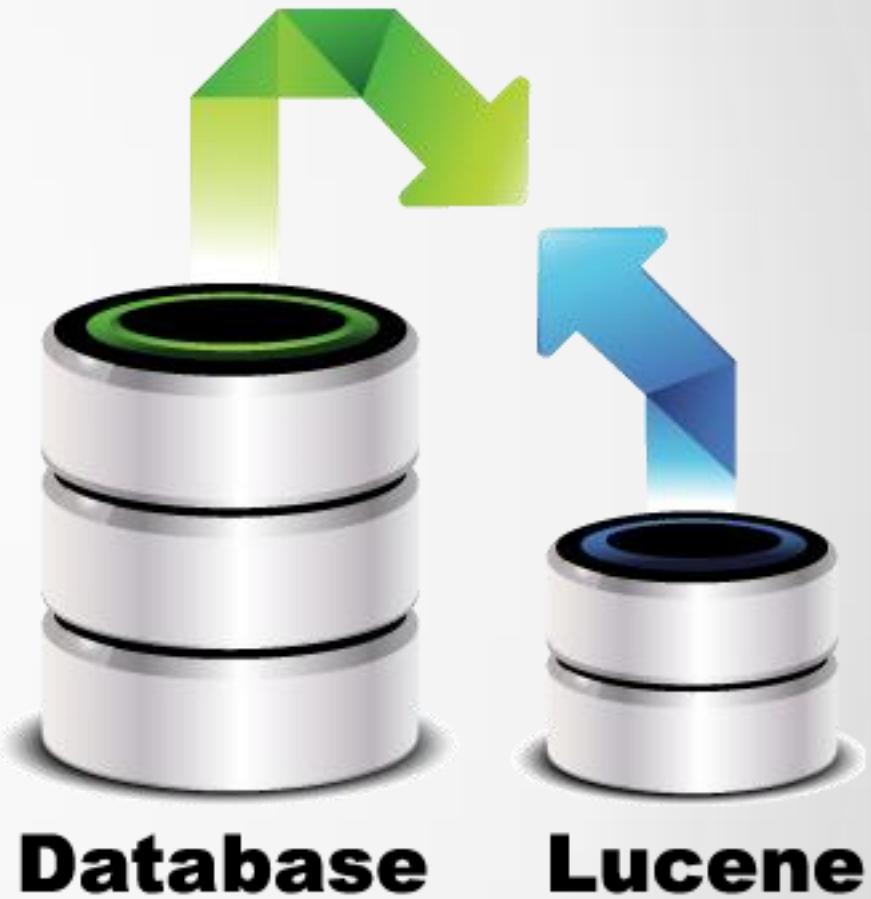
- Accessed via the >> button
- Forces a Re-Index on the files
- Executes a **physical** re-index
- Typical use is when an Ifilter has been installed
- Use the File Extension filter to limit the number of files



Property File Re-Index Demo

Search Indexes

- Properties extracted from the database
- Faster searching in Vault
- Token searches



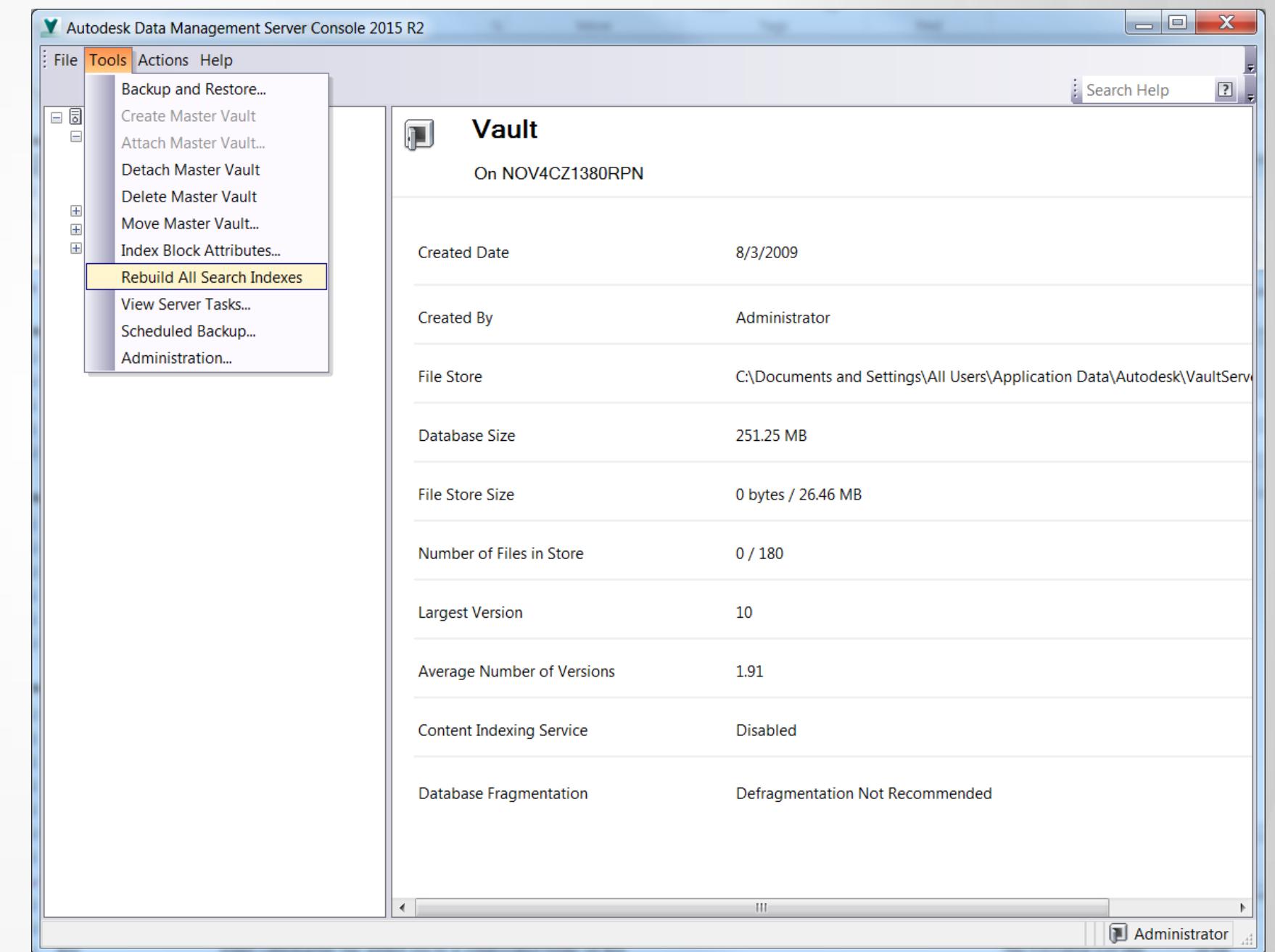
Search Indexes - Tokens

- Chunks of property values

File name	Token
A-055401-321.ipt	<ul style="list-style-type: none">• A• -• 055401• -• 321• ipt
Great White Shark.doc	<ul style="list-style-type: none">• Great• White• Shark• doc
Gr8work.xls	<ul style="list-style-type: none">• Gr• 8• work• xls

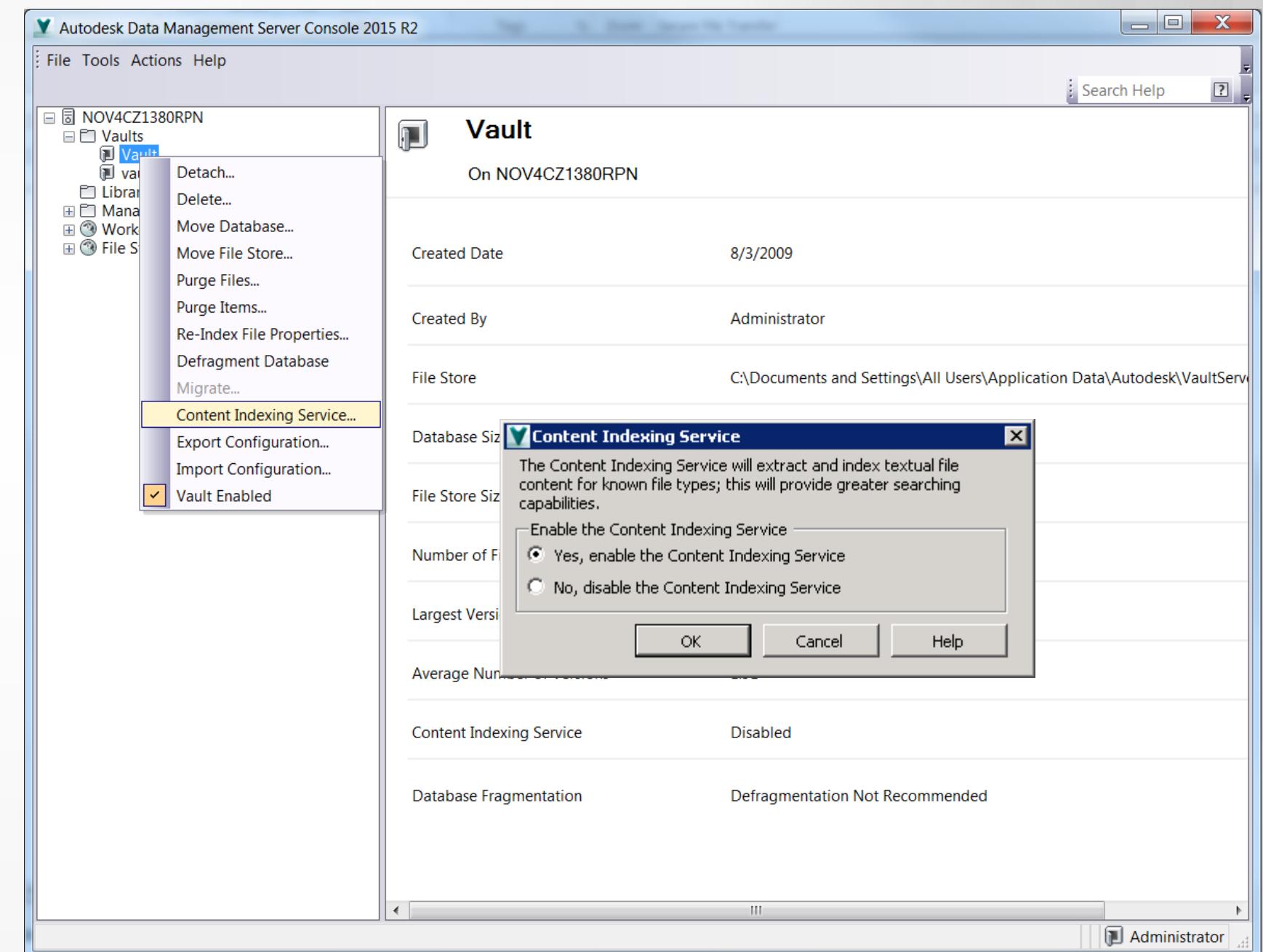
Rebuild Search Indexes

- Not the same as Rebuild Property Indexes
- Maintenance ran automatically
- Run per site basis



Content Indexing

- Extracts the full text contents from existing files
- Added to Lucene
- Enabled per Vault



Summary

- Better understanding of Property Administration
- Better understanding of Property Compliance
- Better understanding of Property Indexing

Q & A

Session Feedback

- Via the Survey Stations, email or mobile device
- AU 2014 passes given out each day!
- Best to do it right after the session
- Instructors see results in real-time



