



HaloCAD for Autodesk Vault 2.6
Operations Manual

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Typographic Conventions

This guide uses the following typographic conventions to distinguish types of in-text information and icons to alert you to important information.

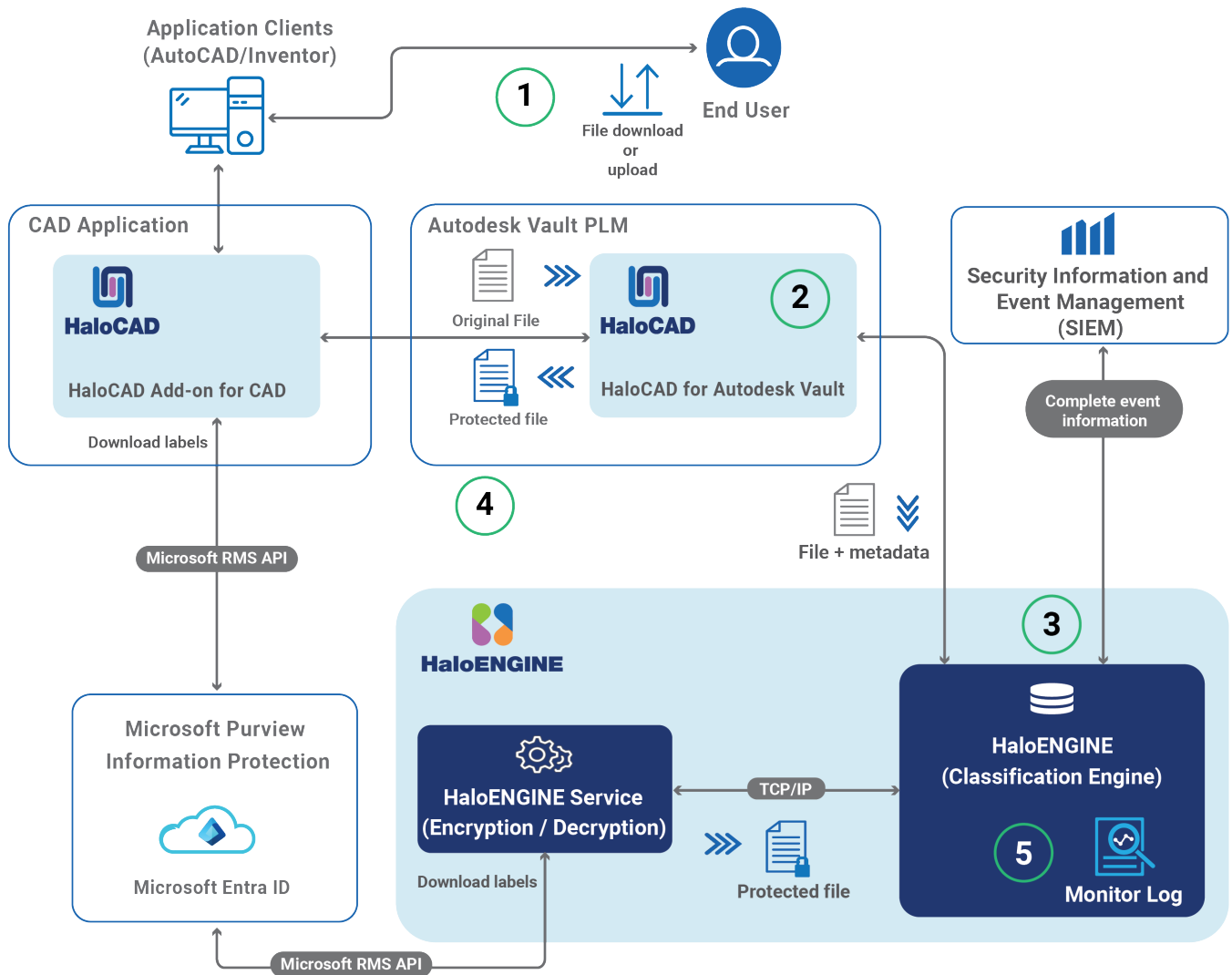
| Convention | Description |
|----------------------|--|
| Boldface type | <ul style="list-style-type: none">• Items you must select, such as menu options, command buttons, or items in a list.• Titles of sections, sub-sections, etc. |
| <i>Italic type</i> | <ul style="list-style-type: none">• To emphasize a word• Error messages• Table and Figure captions |
| Consolas Font | <ul style="list-style-type: none">• Package names• Filenames and directory names• XML element names and attribute names• Parameters• File type• Code examples <p>Example:</p> <pre>hesadm.exe start -user <domain\user> -pwd <password></pre> |
| Hyperlink | Provides quick and easy access to cross-referenced topics. Hyperlinks are highlighted in blue and underlined. |
| Admonitions | <p>Note</p> <p>Contains detailed information about a topic and are of direct importance to the subject at hand.</p> |
| | <p>Warning</p> <p>Contains information about circumstances, parameters, and so on that MUST be fulfilled. Failure to comply will have consequences for the current operation.</p> |
| | <p>Tip</p> <p>Contains useful information about the operation of the application.</p> |
| | <p>Info</p> <p>Contains information, guidelines, or suggestions for performing tasks more effectively.</p> |

1. About this Manual

This manual provides comprehensive guidelines and step-by-step instructions for working with HaloCAD solutions (Monitor and Protect). For installation and configuration instructions, please refer to the "Installation Manual" shipped with the product package.

2. How does it Work?

At a high level, HaloCAD workflow involves the following steps:



HaloCAD for Autodesk Vault

1. Step 1: File check-out/check-in

- a. A user opens an existing document.
- b. Applies, check-out (download), or check-in (upload).

2. Step 2: File transfer through the PLM HaloCAD component

HaloCAD for Autodesk Vault collects the metadata and retrieves the action derivation from the HaloENGINE. File processing is based on the following parameters:

- a. If HaloENGINE Service=Local, send the file directly to the (local) HaloENGINE Service for file handling either in "File path" or "Stream".

- b. If HaloENGINE Service=Remote, the metadata and label information from the HaloENGINE is sent to the remote HaloENGINE Service for file processing.

3. Step 3: Encryption/decryption

According to the metadata collected, the action is executed in the file.

- a. The file will not be processed if any inappropriate action is present or no action is available. It will be downloaded without any changes.
- b. If a suitable action with a label is found, the file is sent to the HaloENGINE in local mode or to the HaloENGINE Service in remote mode to further file processing. Note: In the check-in case, the label is removed, and then the decrypted file is stored in Autodesk Vault PLM.
- c. **Other action:** HaloCAD prevents file downloads if a block action rule in HaloENGINE is properly configured.

4. Step 4: Processed file sent to the user

The file is encrypted with the derived label and returned to the user through HaloCAD for Autodesk Vault.

5. Step 5: Monitor log

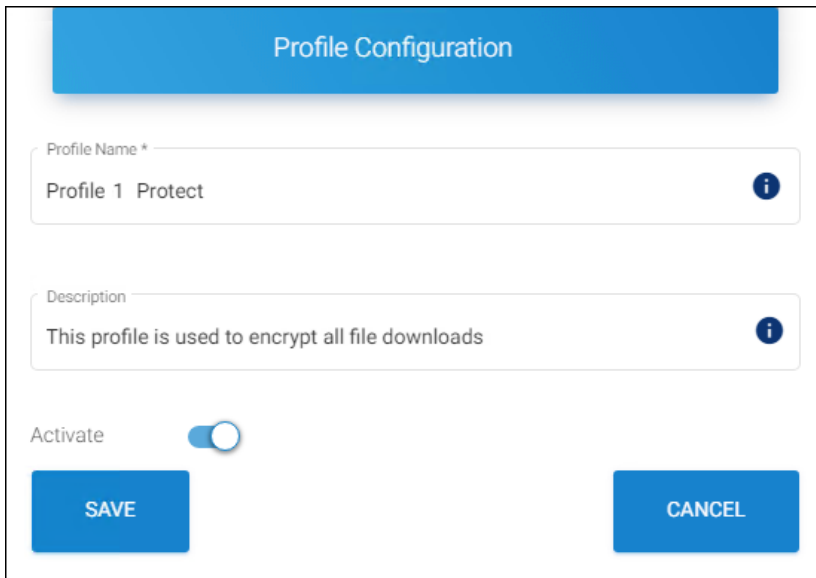
The event is captured by the HaloCAD component and forwarded to the monitor log of the HaloENGINE.

3. How to Protect a CAD File?

This section describes how to protect AutoCAD, Inventor, and Office files via PLM. Note: We recommend referring to the "Operations Manual of HaloCAD Add-on for AutoCAD/Inventor" to know more about standalone HaloCAD protection scenarios.

Fulfill the Requirements

1. HaloCAD for Autodesk Vault needs to be installed and set up.
2. HaloENGINE Service must be installed and configured.
3. HaloENGINE must be installed and configured.
4. The Classification Engine must be configured. For illustration purposes, a simple classification profile is explained here.
 - a. Step 1: Enter a name for the profile.



The screenshot shows a 'Profile Configuration' dialog box. It has a blue header with the text 'Profile Configuration'. Below the header, there are two text input fields. The first is labeled 'Profile Name *' and contains the text 'Profile 1 Protect'. The second is labeled 'Description' and contains the text 'This profile is used to encrypt all file downloads'. Below these fields, there is an 'Activate' label next to a toggle switch that is currently turned on. At the bottom of the dialog, there are two blue buttons: 'SAVE' on the left and 'CANCEL' on the right.

Sample profile

- b. Step 2: Configure classification properties and their values.

Classification Schema Configuration

Property Name * i

Property Value i +

Enable tree structure

Secret 🗑️

Confidential 🗑️

Internal 🗑️

Default Property Value * ▼

Deactivate Property

SAVE
CLOSE

Classification properties

- c. Step 3: Create classification rules based on metadata types. Note: If you want to use your metadata, specify it on the Custom Metadata page of the HaloENGINE admin portal. Please refer to the Custom Metadata section of the HaloENGINE Installation and Configuration manual.

Download Classification Rules

Note: Any change in the Download Classification Rules requires "RELOAD CONFIGURATION".

Property List:
Choose a property

Sensitivity

Countries

Departments

Overview:
Priority of rules is from top to bottom

Sensitivity.Confidential

VAULT.folder_name == Designs

+
✎
🗑️
⬆️
⬇️

Rules

d. Step 4: Create an action rule to label and block.

ACTION RULE OVERVIEW

Applied Actions : LABEL System Type : VAULT Label Name : HCAD Confidential

Constructed Rule :

| PROPERTY | CONDITION | VALUE |
|-------------|-----------|--------------|
| Sensitivity | Equal | Confidential |

CLOSE

Action rule for labeling

ACTION RULE OVERVIEW

Applied Actions : BLOCK System Type : AUTODESK_VAULT

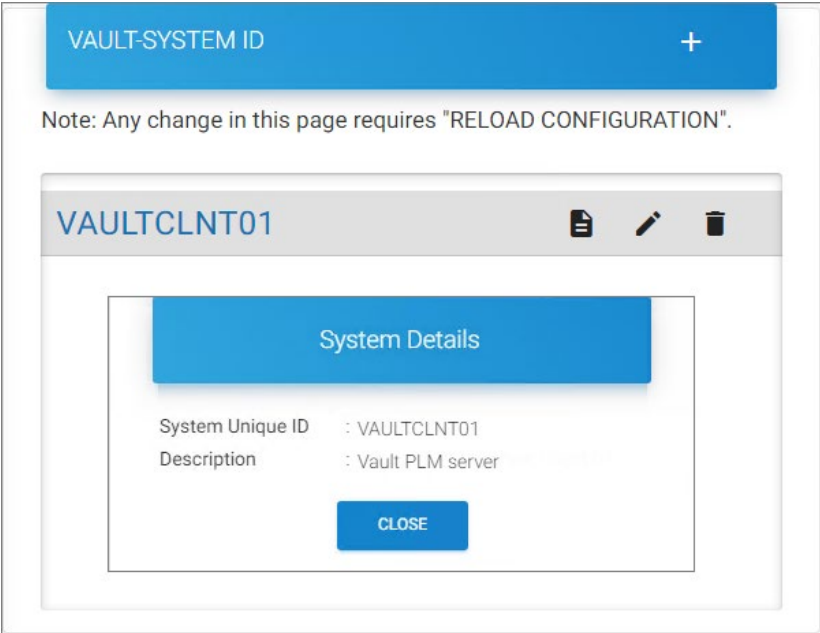
Constructed Rule :

| PROPERTY | CONDITION | VALUE |
|-------------|-----------|--------|
| Sensitivity | Equal | Secret |

CLOSE

Action rule for blocking

e. Step 5: Assign Systems to the profile.



Systems

5. HaloCAD add-on must be installed.

3.1. Download a Protected File

In various ways, a file can be exported from the Autodesk Vault server. For illustration purposes, a file is downloaded/check-out via Autodesk Vault server / Autodesk Vault Thin Client / AutoCAD / Inventor applications:

1. Option # 1

- a. Login to **Autodesk Vault Professional Client** (Standalone Autodesk Vault Client).
- b. From the **Project Explorer** screen, navigate to a folder of your choice and select a file.
- c. Now, right-click on it and then select **Get** to download the file.

2. Option # 2

- a. Open the **Autodesk Vault Thin Client**, select the Workspace, and **Sign In** with your credentials.
- b. The files and folders are listed from the workspace you have logged into.
- c. Navigate to the folder, select the file, and download it by either clicking the three dots or using the download button.

3. Option # 3

- a. Open AutoCAD/Inventor application.
- b. Go to the **Vault** tab > click **Log In** and enter your credentials.
- c. Click **Open** and select a file to download.

4. The downloaded file will be labeled as defined in the HaloENGINE.

5. The encryption settings from the label are enforced and remain with the file wherever it is stored.

6. If you are an authorized user with owner permission, you can modify and remove the label.

7. The audit log will be captured for all uploads or downloads, irrespective of file protection.

3.2. Blocking a File Download

1. Login to **Autodesk Vault Professional Client** (Standalone Autodesk Vault Client).
2. From the **Project Explorer** screen, navigate to a folder of your choice and download a file.
3. As an alternative, you can choose to download a file via another method.

Results:

- a. The action rule for block configured in HaloENGINE prevents file download. As a result, no file download occurs.
- b. Refer to the monitor log for further information.

4. Common Scenarios

This section presents some common scenarios for illustrative purposes and provides general guidelines.

4.1. How to Open a Protected File?

Prerequisite: Before opening the protected file, make sure the HaloCAD Add-on for AutoCAD and/or HaloCAD Add-on for Inventor is installed.

1. Click on the protected file.
2. The first time when you try to open a labeled file, HaloCAD will prompt you about the Microsoft Sign-In Assistant.
3. Click **OK** when prompted, *Microsoft Sign-In Assistant will be invoked and the user credentials are cached.*
4. Follow the on-screen prompts to complete the authentication process.

Results:

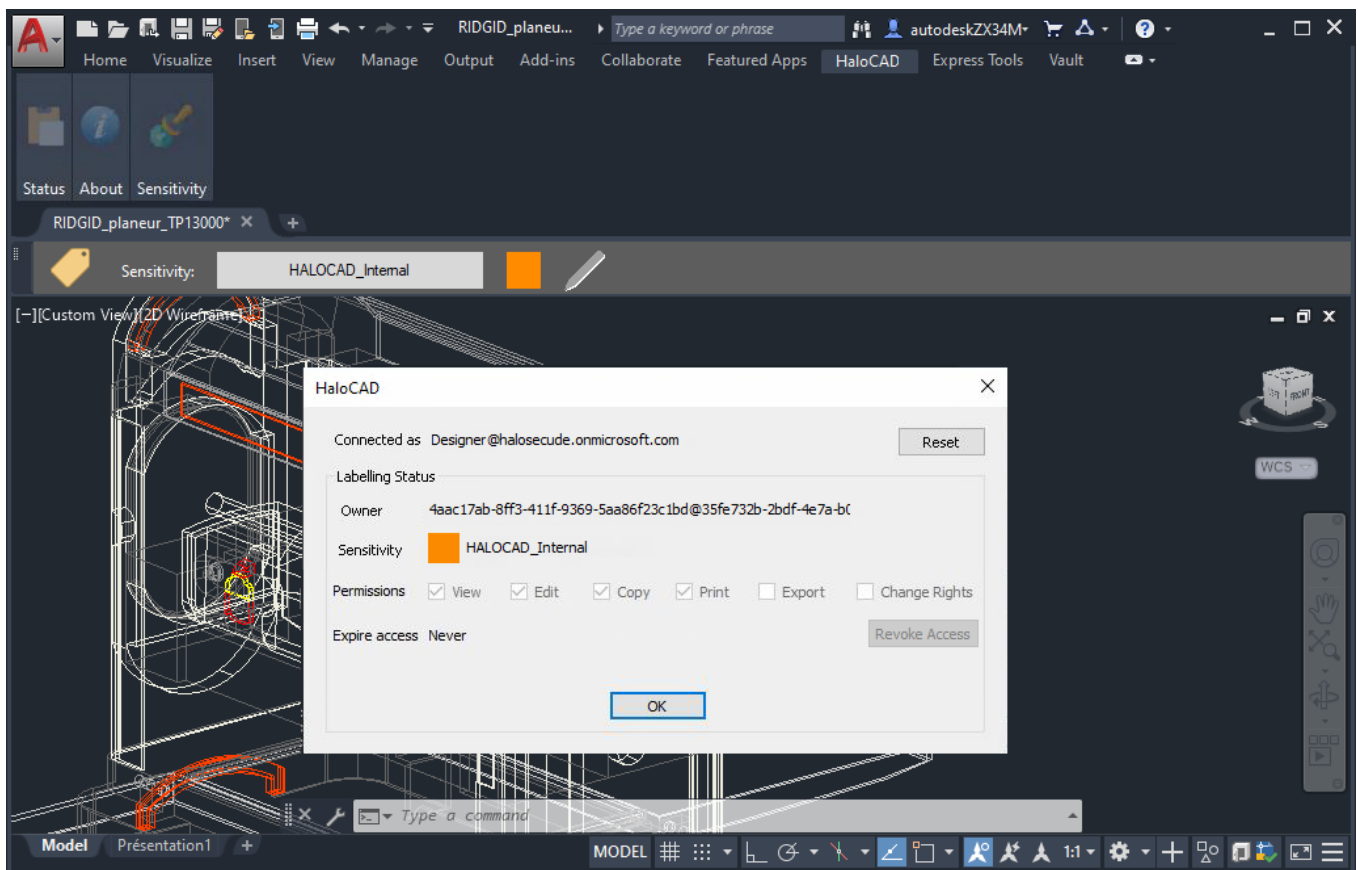
- a. On successful confirmation, the file will open.
- b. Users could experience different access results for the same document based on the policy settings. For more details, refer to the "Operations Manual of HaloCAD Add-on for AutoCAD/Inventor".

4.2. Integrating with AutoCAD Application

Below are some examples of the functionality of HaloCAD in the AutoCAD application.

4.2.1. Example 1: Application ID as the Owner of the File

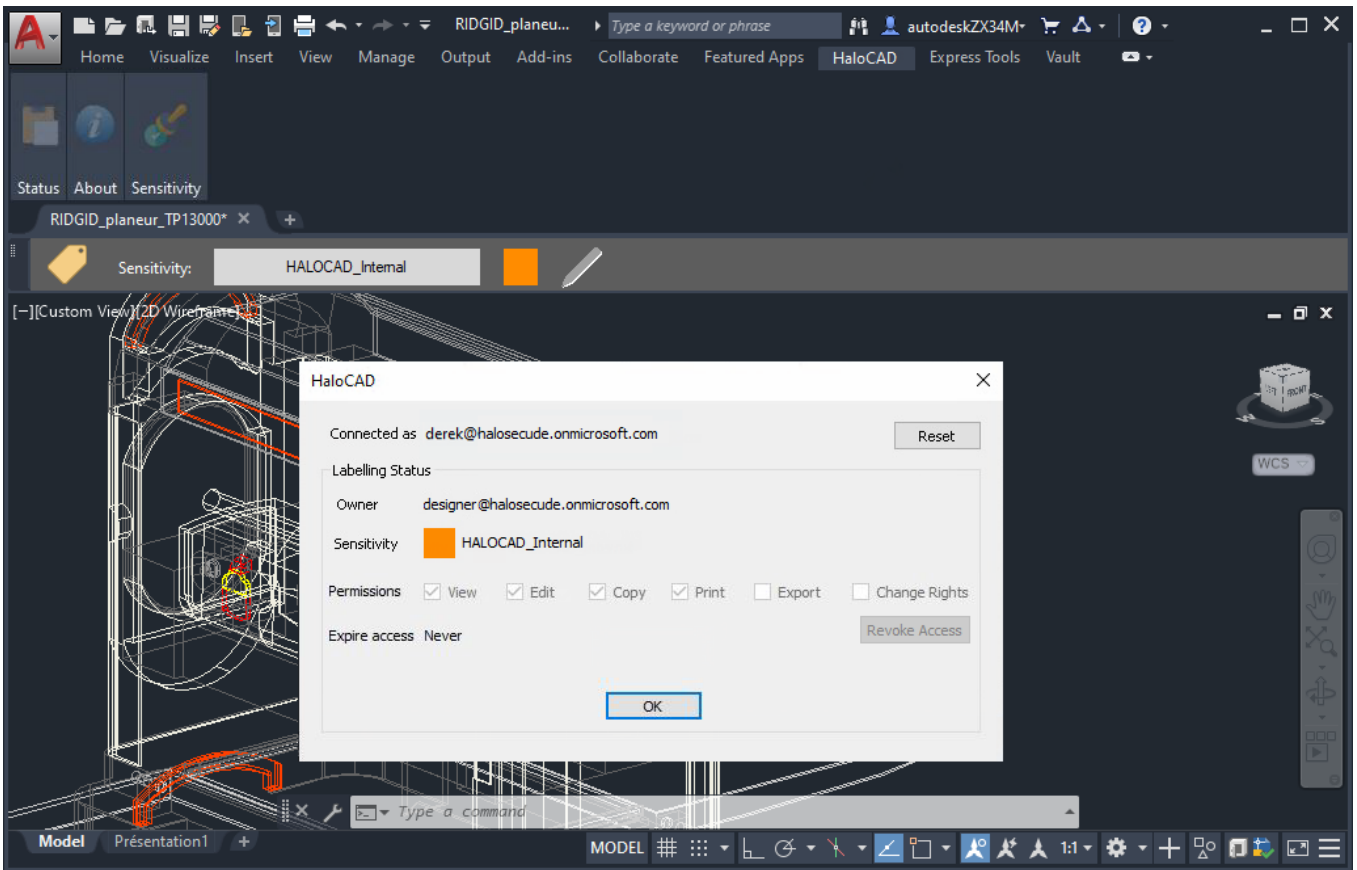
The following figure shows an example of an Application ID that is used to initialize HaloENGINE Service. This Application ID will be the owner of the document by default, however, a static email can also be an owner of the downloaded file if specified in the HaloENGINE. Please refer to example 2.



Application ID as the owner of the file

4.2.2. Example 2: Static Email as the Owner of the File

The following figure shows an example of an email address configured in the HaloENGINE. This email address will be the owner of the exported document.

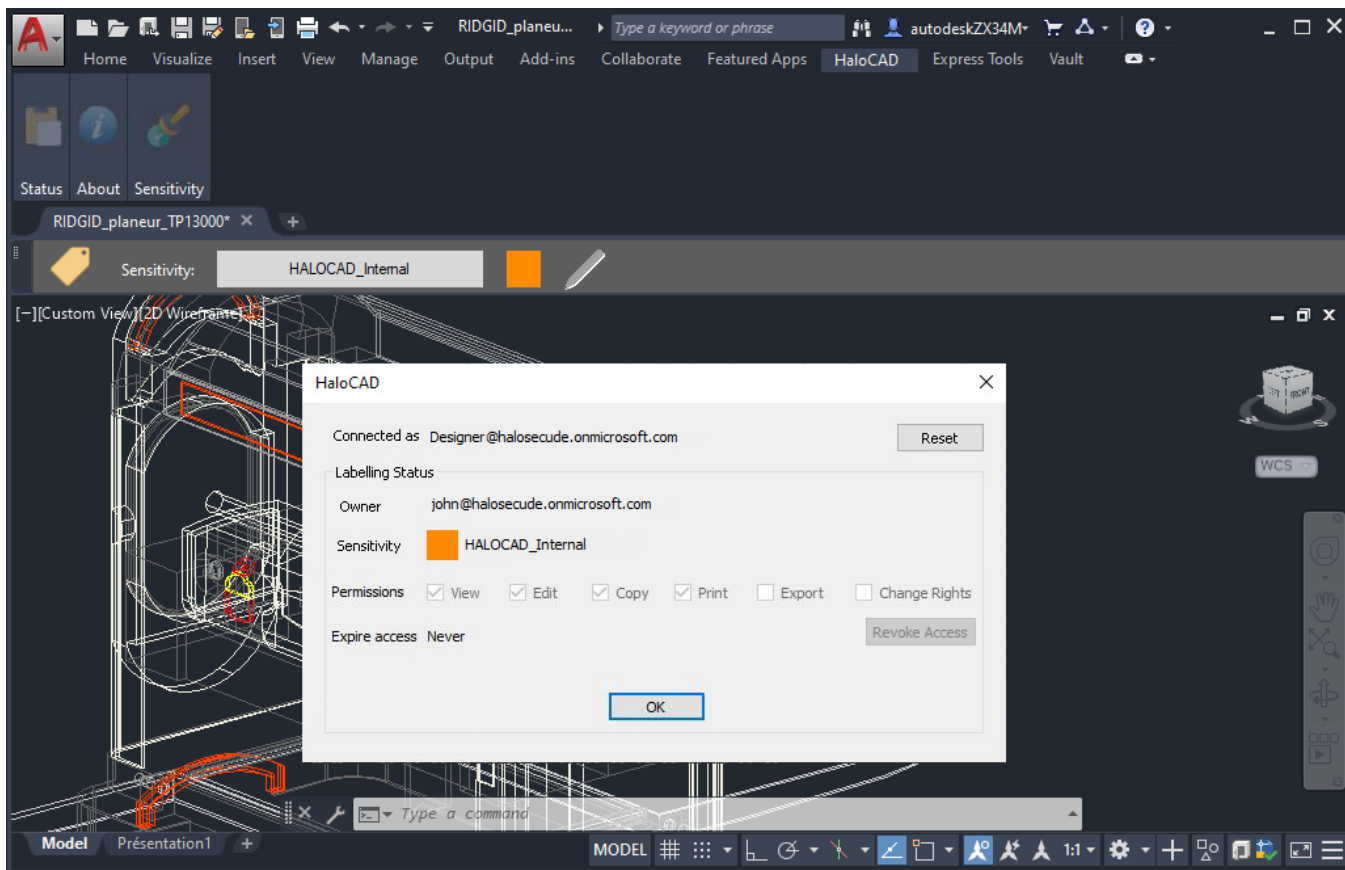


Static Email as the Owner of the File

4.2.3. Example 3: User as the Owner of the File

The following figure shows an example of a PLM logged-in user who has become the owner of the document. To achieve this, the Owner configuration must be set to "user" on the HaloENGINE Admin portal. The exported document will have the email address of the currently logged-in user as its owner.

Secure



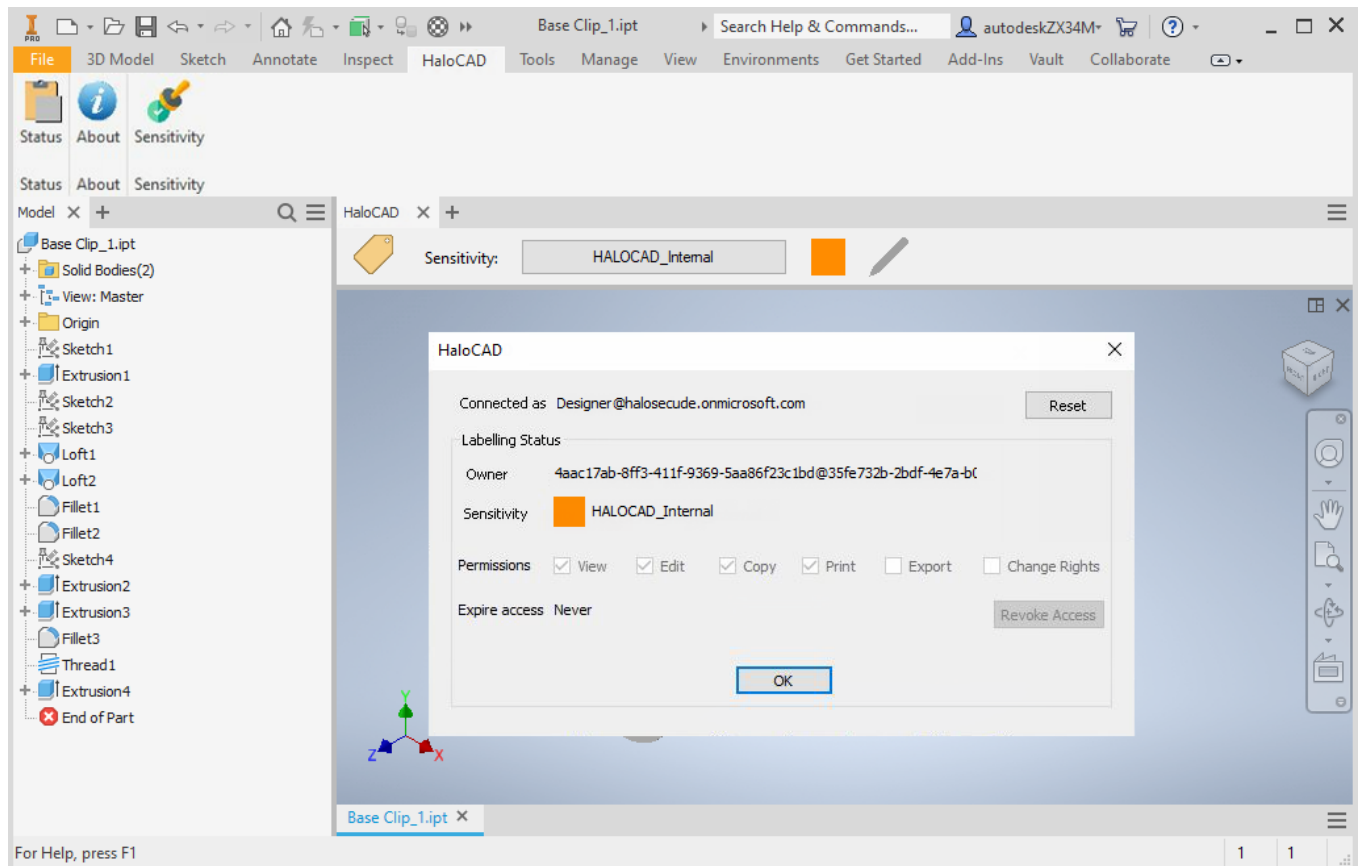
User as the Owner of the File

4.3. Integrating with Inventor Application

Below are some examples of the functionality of HaloCAD in the Inventor application.

4.3.1. Example 1: Application ID as the Owner of the File

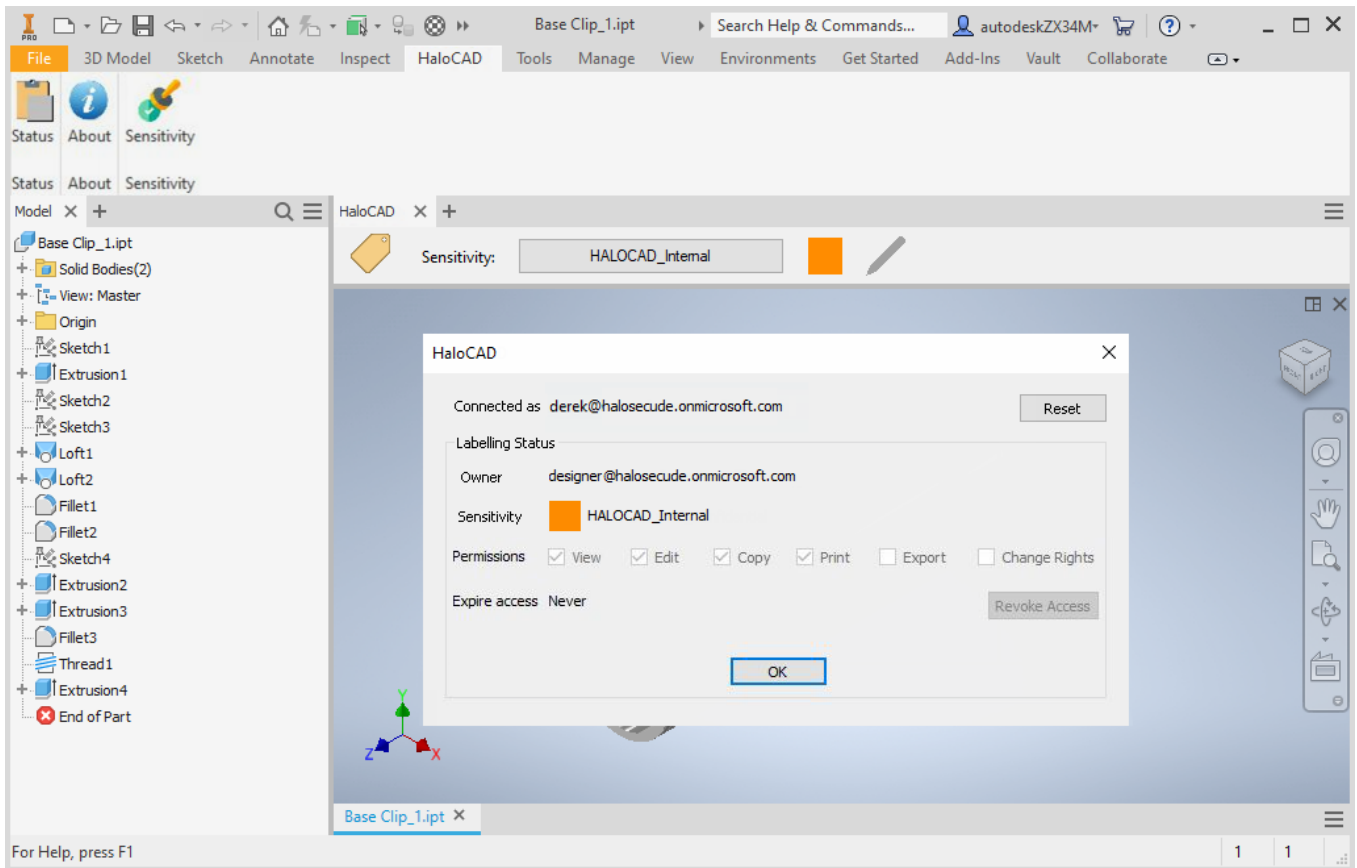
The following figure shows an example of an Application ID that is used to initialize HaloENGINE Service. This Application ID will be the owner of the document by default, however, a static email can also be an owner of the downloaded file if specified in the HaloENGINE. Please refer to example 2.



Application ID as the owner of the file

4.3.2. Example 2: Static Email as the Owner of the File

The following figure shows an example of an email address configured in the HaloENGINE. This email address will be the owner of the exported document.

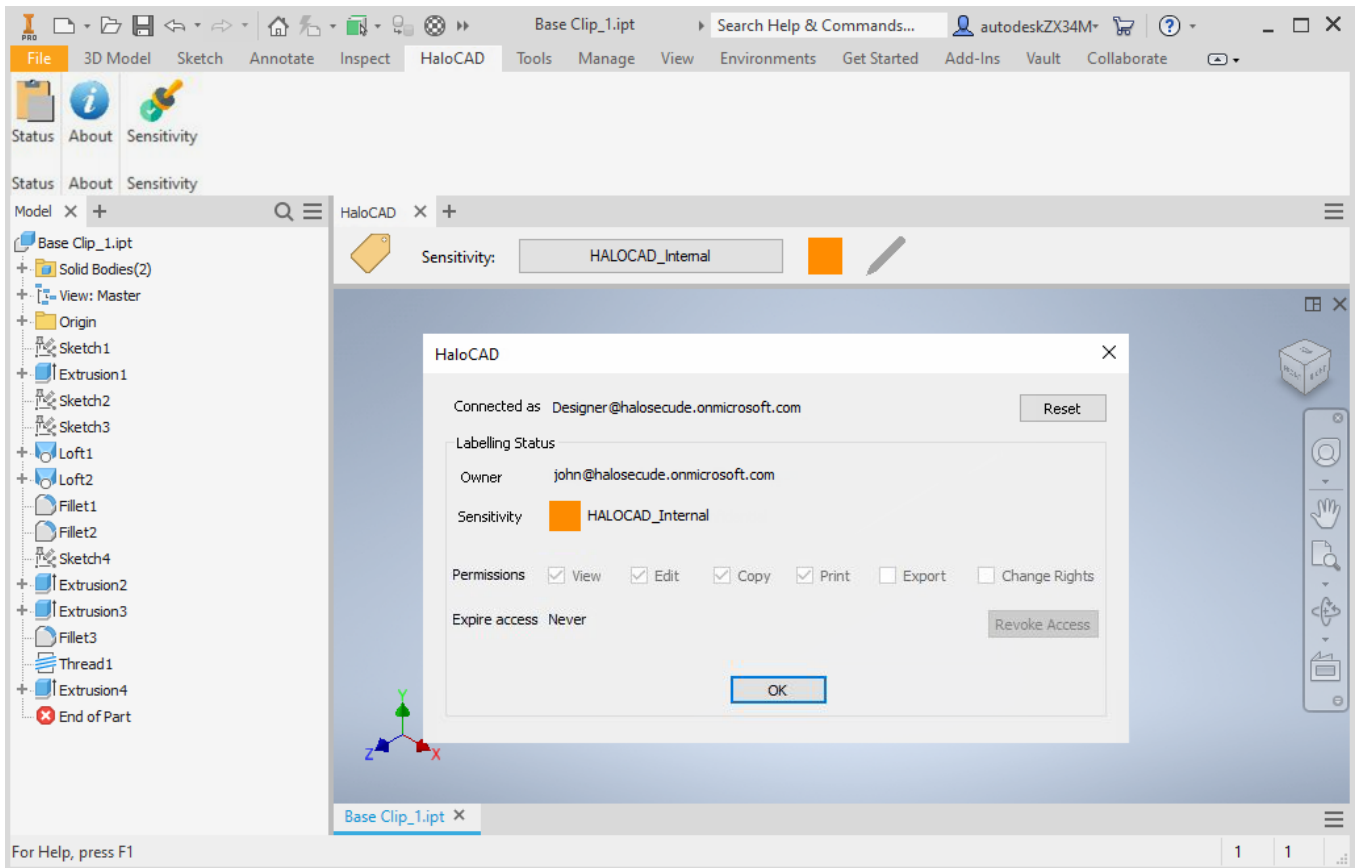


Static Email as the Owner of the File

4.3.3. Example 3: User as the Owner of the File

The following figure shows an example of a user whose name is configured in the HaloENGINE. This user is considered the owner of the document. In case, the user who logged in to Autodesk Vault PLM Server does not have an email ID, then the Application ID (which is used to initialize HaloENGINE Service) will be the owner of the document.

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User as the Owner of the File

4.4. Integrating with MS Office (File Upload and Download) Applications

The following is an example of an upload and download sequence in Autodesk Vault PLM integrated with HaloCAD. Note: Non-office files are also supported (e.g., .txt and .PDF). For illustration purposes, an Excel file is used here.

Check-in sequence

1. Create a new MS Office (Word / Excel) file and select a label from the **Sensitivity** ribbon. Click save to save the file.
2. Or open an existing protected file. [In this example, the file (Bill Of Materials.xlsx) that will be uploaded is already protected with the **HaloCAD INTERNAL** label].
3. Go to the **Autodesk Vault** tab > click **Log In** and enter your credentials.
4. Click **Check-in** and select the folder of your choice to save in Autodesk Vault Server.
5. The **Check-in** window will appear:
 - a. Select the **Close files and delete working copy** check box.
 - b. Click **OK** on the **Check-in** window.
 - c. To the question "Do you wish to delete the file xxxxx.xlsx from its original location 'C:\xxxx\xxxx\xxxx'?" click **Yes** or **No**.

Results:

- a. During the upload/check-in sequence, the original label is removed, and the decrypted file is stored (checked-in) in Autodesk Vault PLM.
- b. The upload/checked-in event is logged in the HaloENGINE.

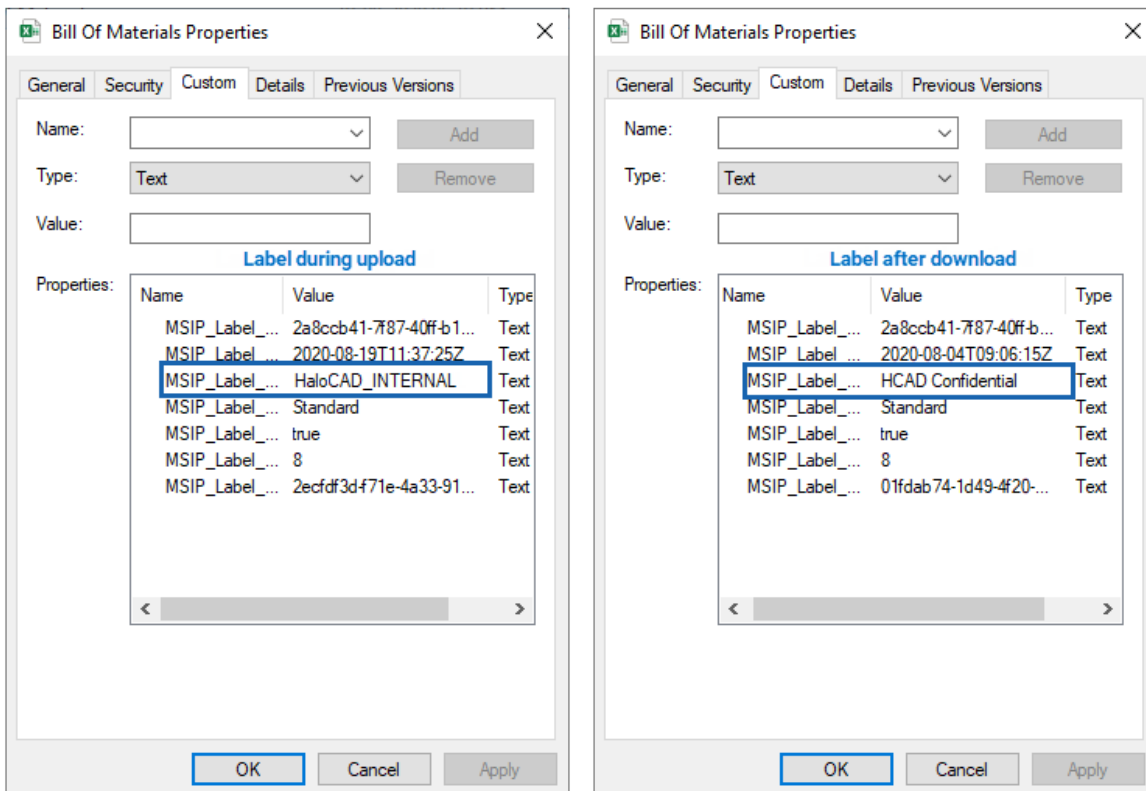
Check-out sequence

1. Go to the **Autodesk Vault** tab > click **Open**, select the previously uploaded file from the Autodesk Vault server, and click **Open**.
2. To the question, "File S/xxxxx/logs/xxx.xlsx is not checked out. Do you want to check it out now?"
 - a. Click **Yes** to check out directly.
 - b. Or click **No** and then click **Check-out** in the **Autodesk Vault** tab.

Results:

- a. During the download/check-out sequence, the file is exported from Vault with a new label that is defined in the Classification Engine.
- b. The download/check-out event is logged in the HaloENGINE.

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File upload and download Sequence

5. Customer Support

Please be ready with the information listed below before contacting our team to help you with the issue you are experiencing. The data that you provide will help us serve you better.

1. Full contact details.
2. HaloCAD component and HaloENGINE build version.
3. Date, time, and description of the error (if possible, provide screenshots).
4. What (if any) third-party products (software or other) were used in conjunction with our product?
5. Any other information necessary to reproduce the error.

Secude offers help and support through

1. Technical support email: support@secude.com

If you choose to contact us by email, please provide your company details and a detailed description of the issue, as well as the log file (if any). Our representative will respond to your email inquiry.

2. Phone support: Call +41 41 510 70 70 to talk to our representative to diagnose and resolve the technical problem.

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