

Utilize Vault & Cloud to address Your Collaboration Challenges

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Join the conversation #AUCity #AU2018





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Irvin Hayes is a Product Manager on the Autodesk Vault team based in Novi, Michigan. He helps partners, consulting, and sales develop Vault deployment plans in enterprise environments and system requirements. You can find multiple classes Irvin has presented at Autodesk University (au.autodesk.com) on a wide range of Vault topics. Irvin is a technology geek and loves sharing with the community on Twitter (@ihayesjr) and through Flipboard Magazine.



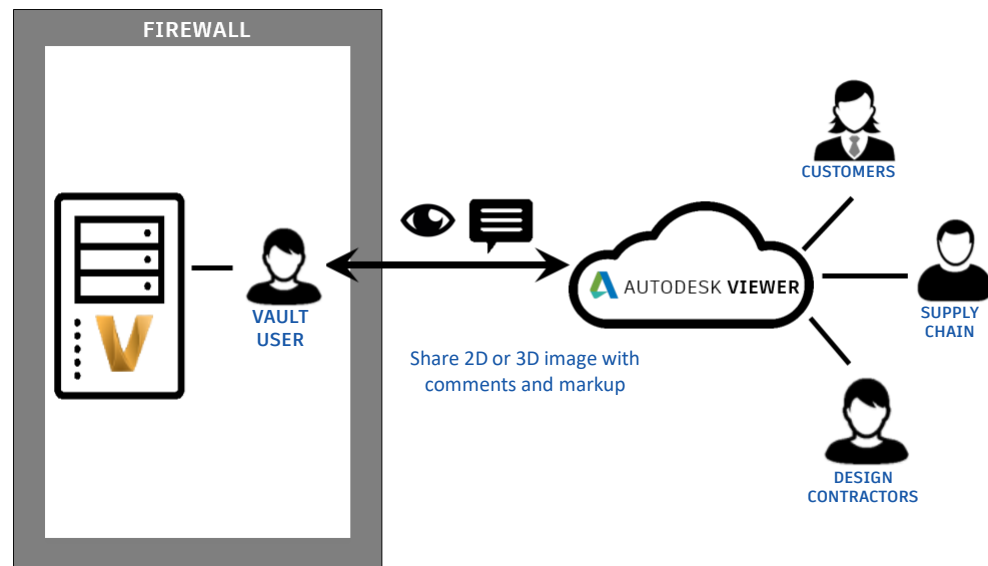
Class Summary

Collaboration with customers and partners is increasingly critical for many businesses. Engineering teams need to collect feedback from customers early in the development cycle and work with partners to outsource manufacturing components as well as support external design collaboration or other processes. In this class, we'll look at how you can rely on Vault data management software to manage your engineering data and processes together with the cloud for collaboration with outside customers and partners.

Objectives & Agenda

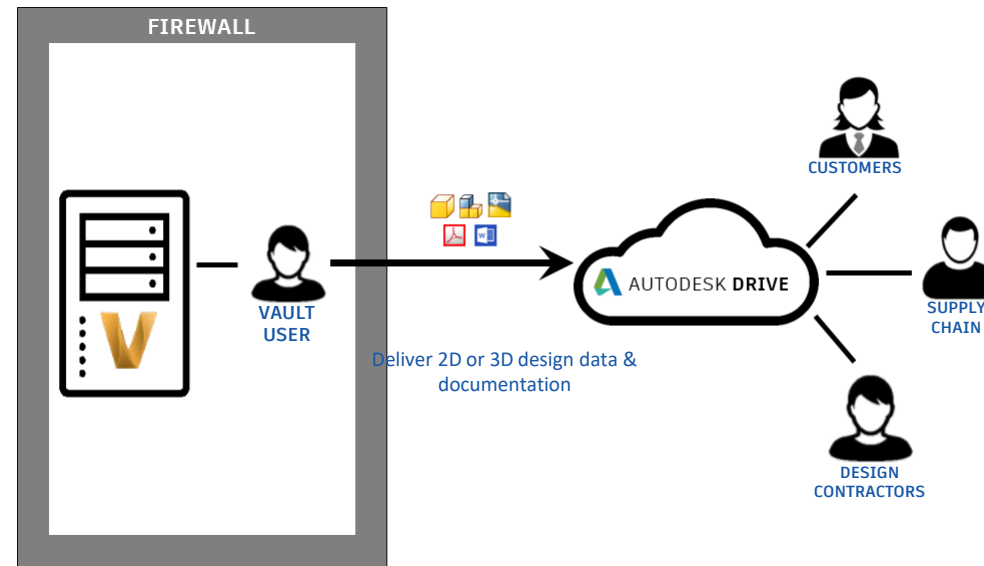
- How to better collaborate with your customers to collect feedback during design review cycle
- Explore new ways to deliver data to your manufacturing suppliers
- Learn how to set up your environment to be ready for collaboration with external designers to outsource design tasks
- Q & A

External Collaboration



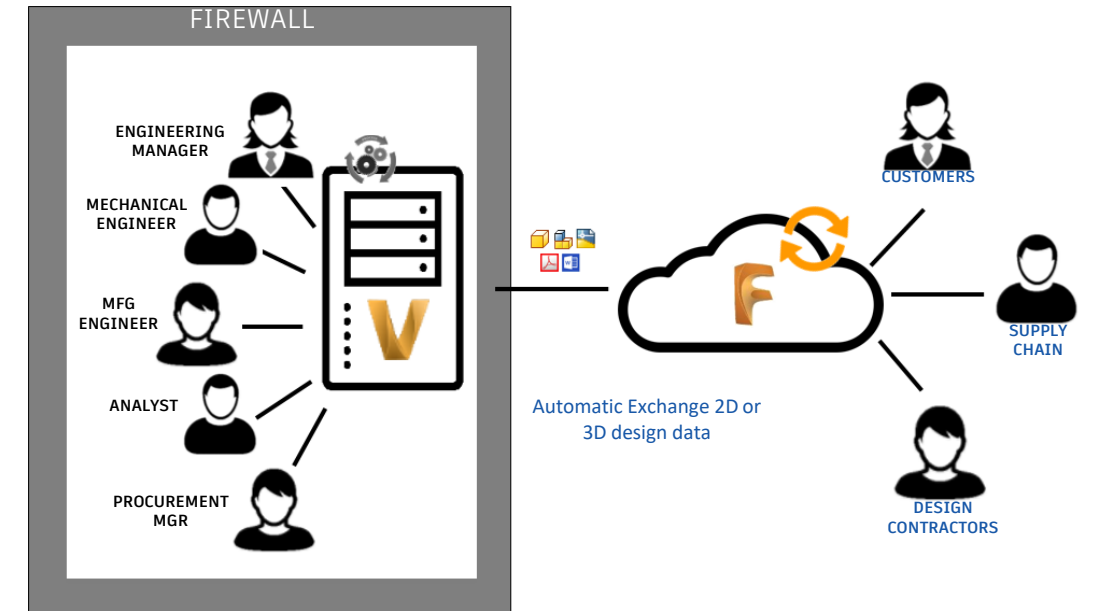
Get Feedback

*Share a **visual representation** and get feedback quickly and easily using Autodesk Viewer*



Deliver Design Files

***Deliver files** to customers and suppliers using Autodesk Drive*



Collaborate On Designs

***Automatically** exchange select data with external collaborators using Fusion team*

Join the Poll



Please join Poll Everywhere Session:



PollEv.com/adskvault

OR

Text ADSKVAULT to 22333



Who are you?

Vault Professional
customer

Vault Workgroup
customer

Vault Basic
customer

Interested in Vault

Reseller/partner

Other

Total Results: 0



What industry do you represent?

Industry
Machinery

Infrastructure

Building

Engineering
Service Provider

Other

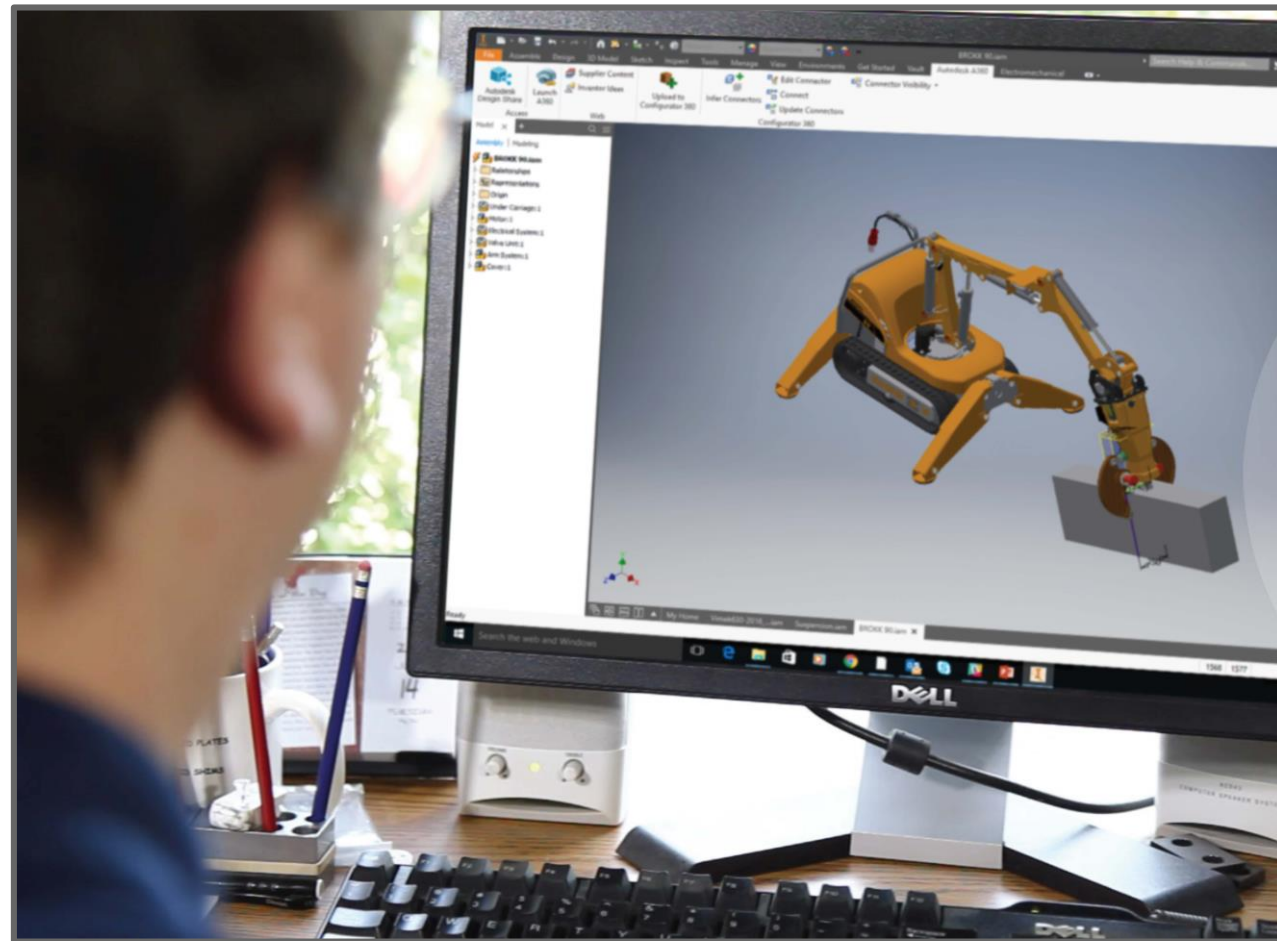
N/A

Total Results: 0

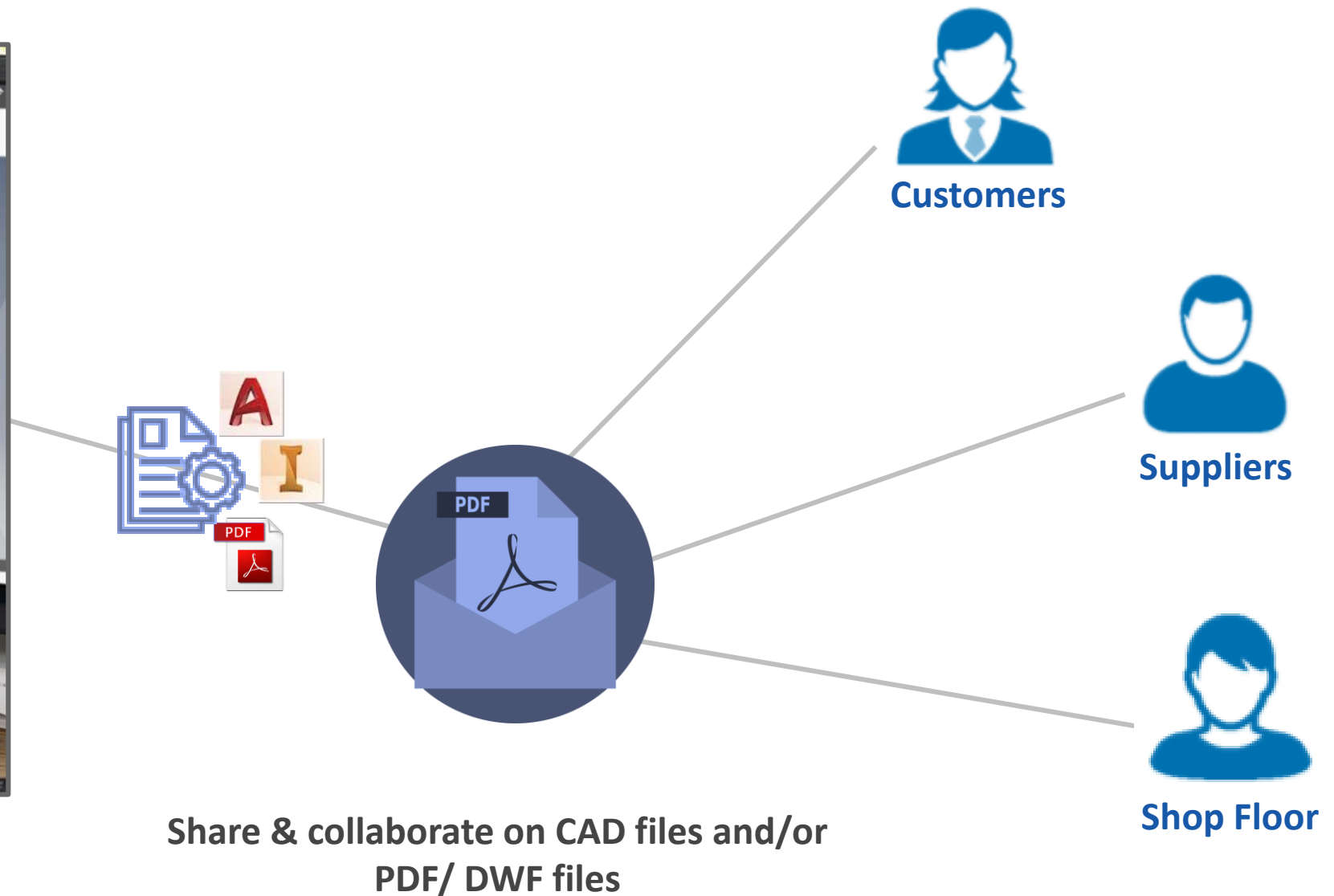
Shared Views – Collect feedback from customers early in the development cycle



Get feedback on Work in Process – Challenge



Design Engineer



How is your engineering team collecting feedback from their customers or 3rd party partners early in the development cycle?

Published DWF file and share e.g.
per email and gather feedback
back via email, phone etc.

Published PDF file and share e.g.
per email and gather feedback
back via email, phone etc.

Online meeting (live review) or
Onsite meeting (live review)

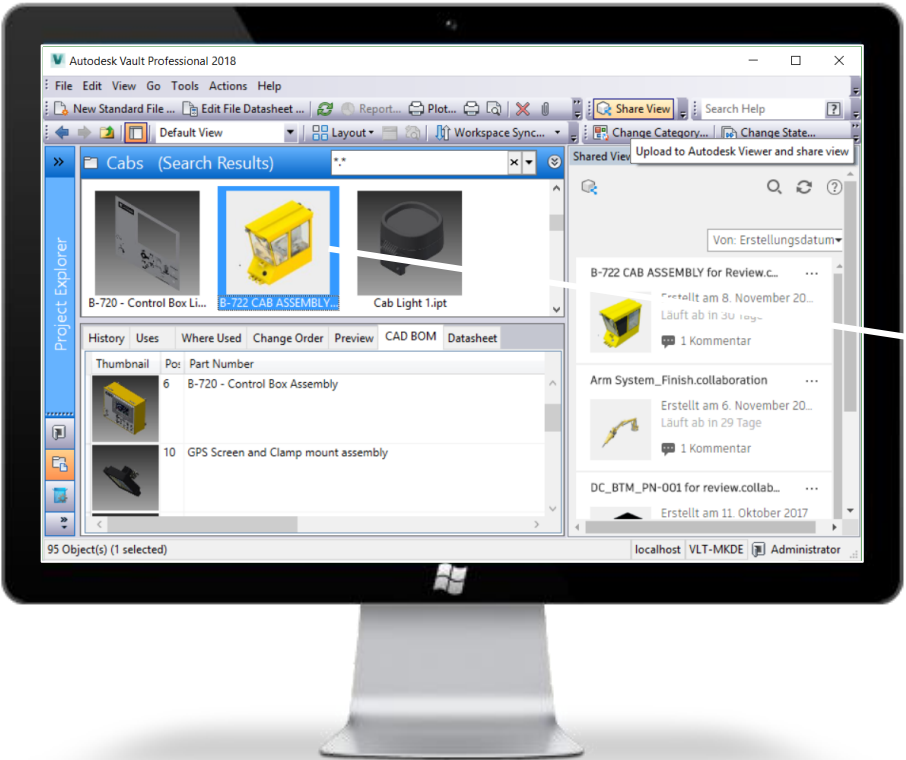
Using other methods

Engineering Team does not collect
feedback from customers or 3rd
party partners

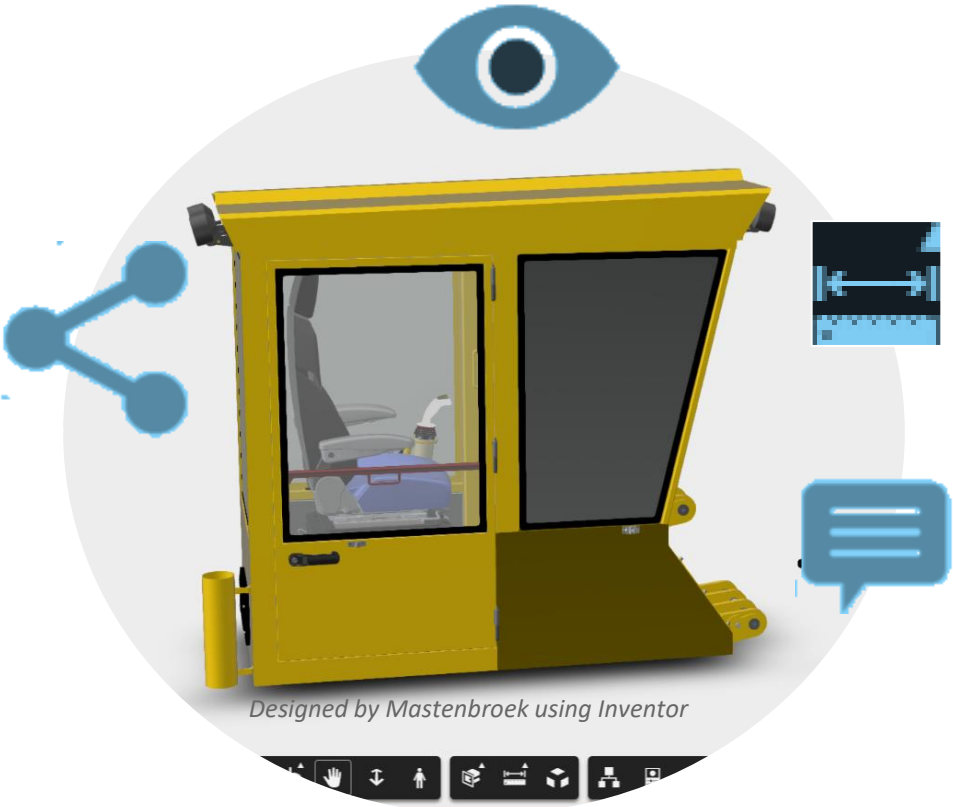
I don't know

Total Results: 0

Shared Views – Simplify Review Cycles



Design Engineer

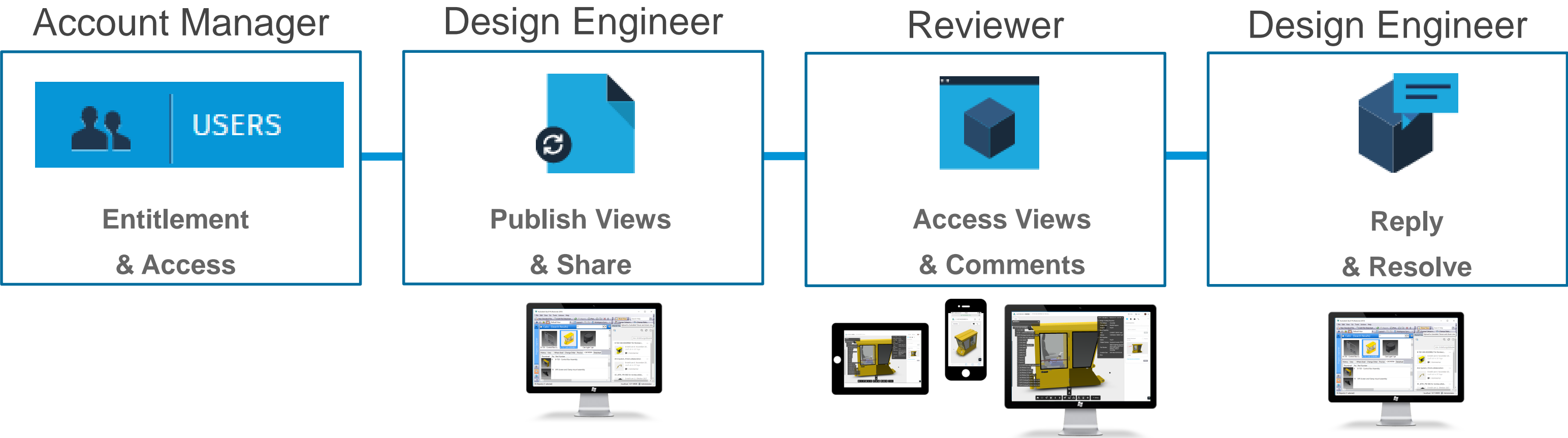


Share & collaborate on visual representation all in one place



Customers

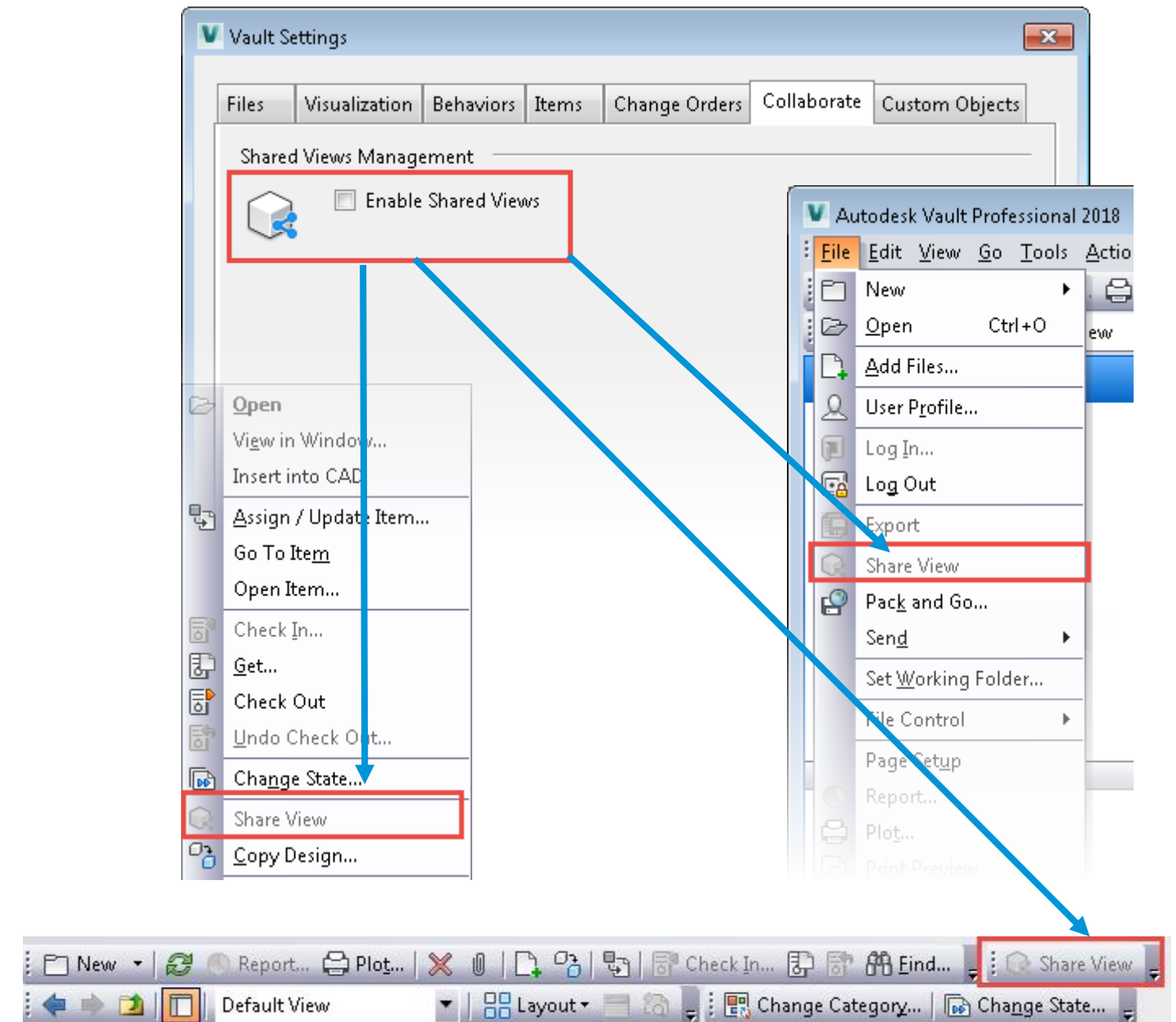
Shared Views - Workflow



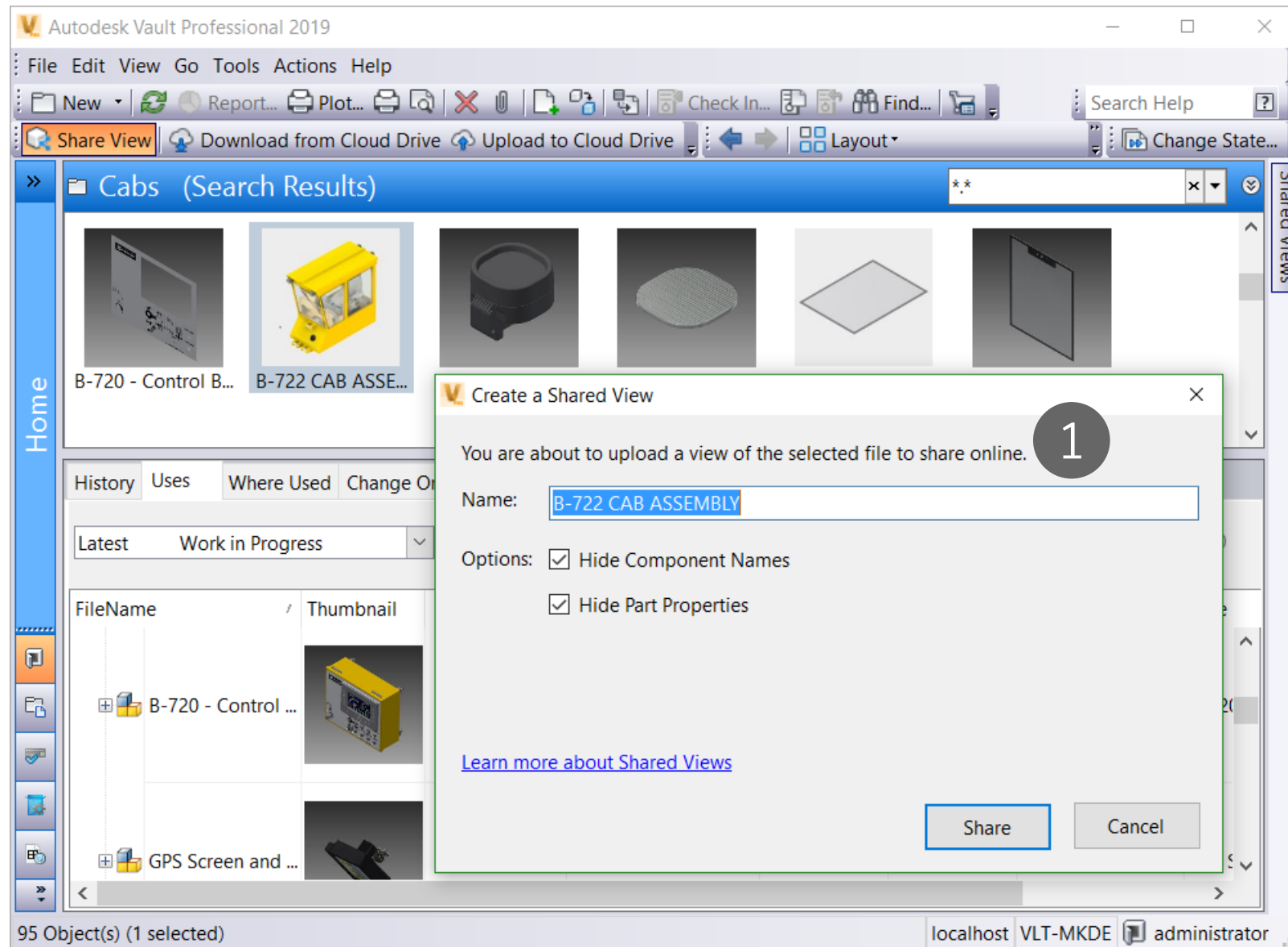
Life Demo

Admin Control to Access Shared Views Capabilities

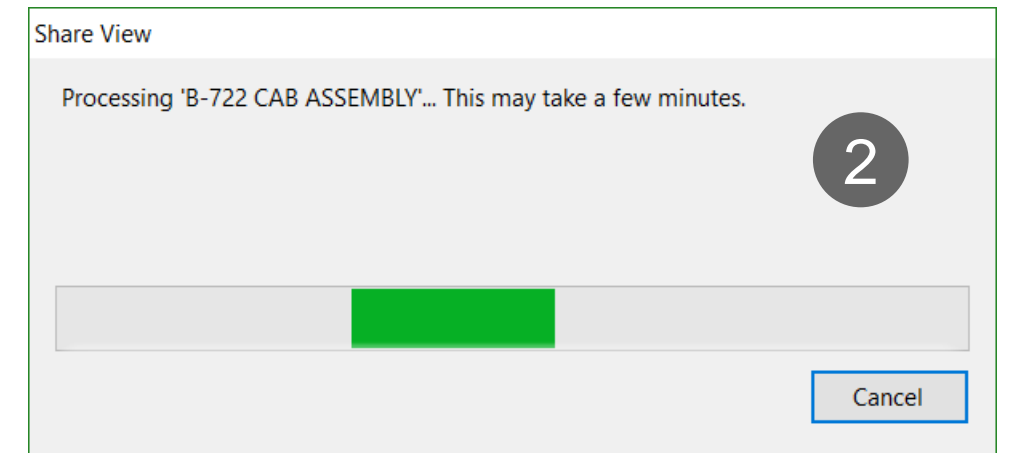
- Administrator control Shared Views availability (Enabled per default)
- User access Shared Views through File menu, Toolbar and context menu



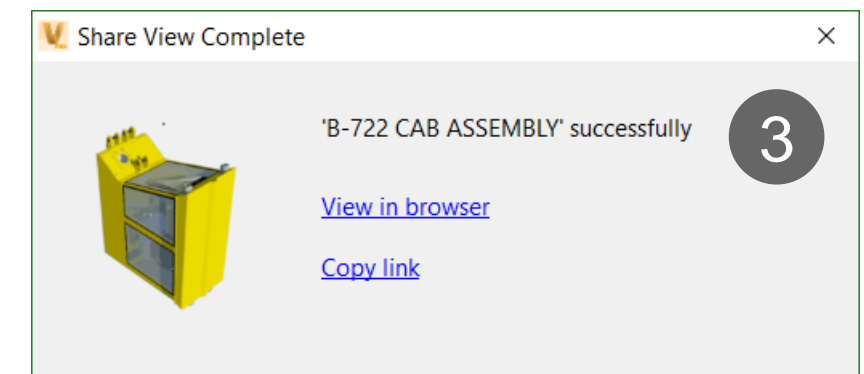
Publish Shared View



Name the View and set the necessary options



Views are created locally and uploaded to Autodesk Viewer

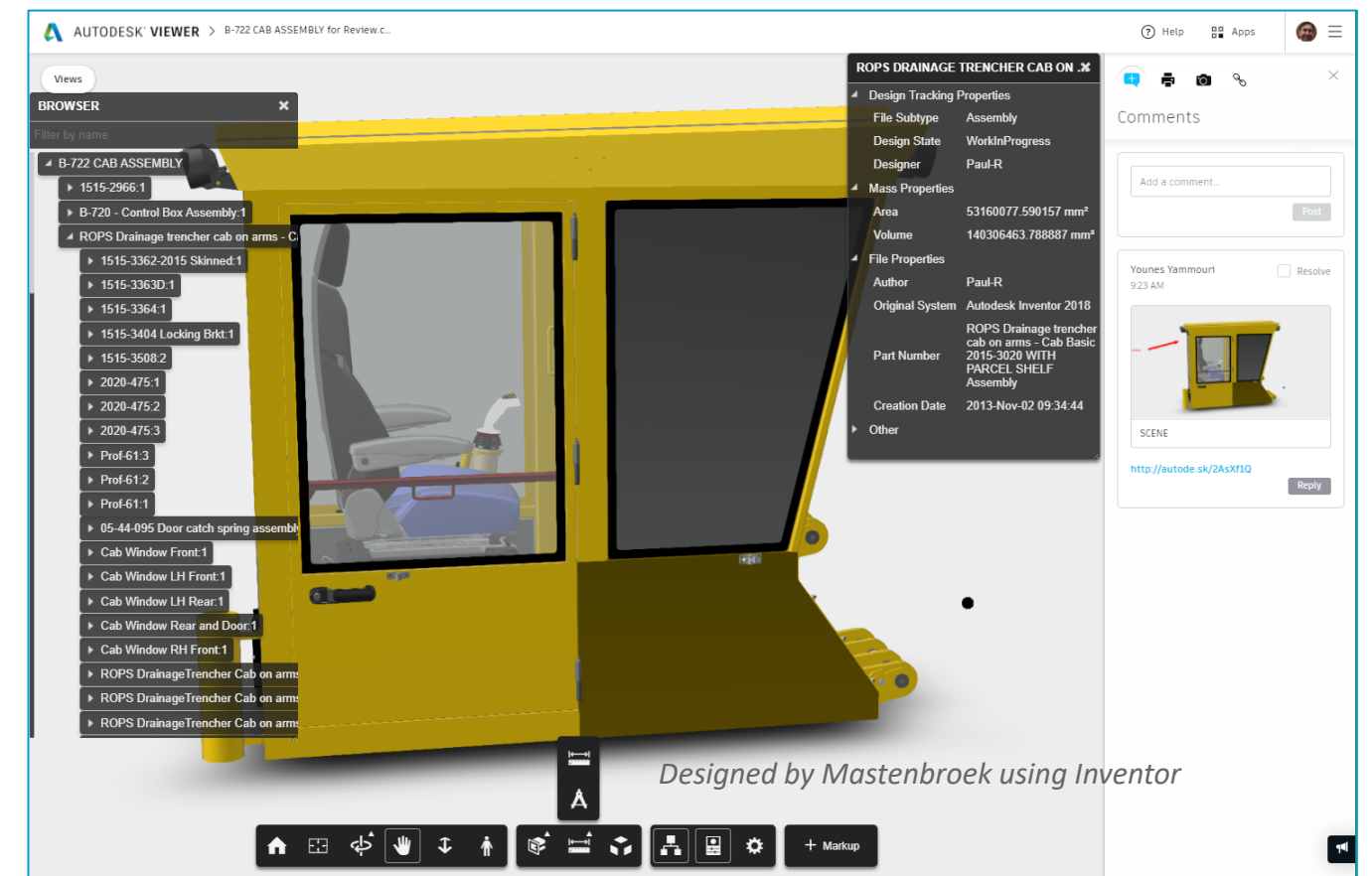


Copy Link to share with external collaborator

Reviewer Access & Comment

- Reviewer access viewable in Autodesk Viewer
- At Any devices
- In the office or on the road
- No need to install any additional viewers
- Reviewer Sign In to add a comment
- Design Engineer receives email notification every time a comment is added

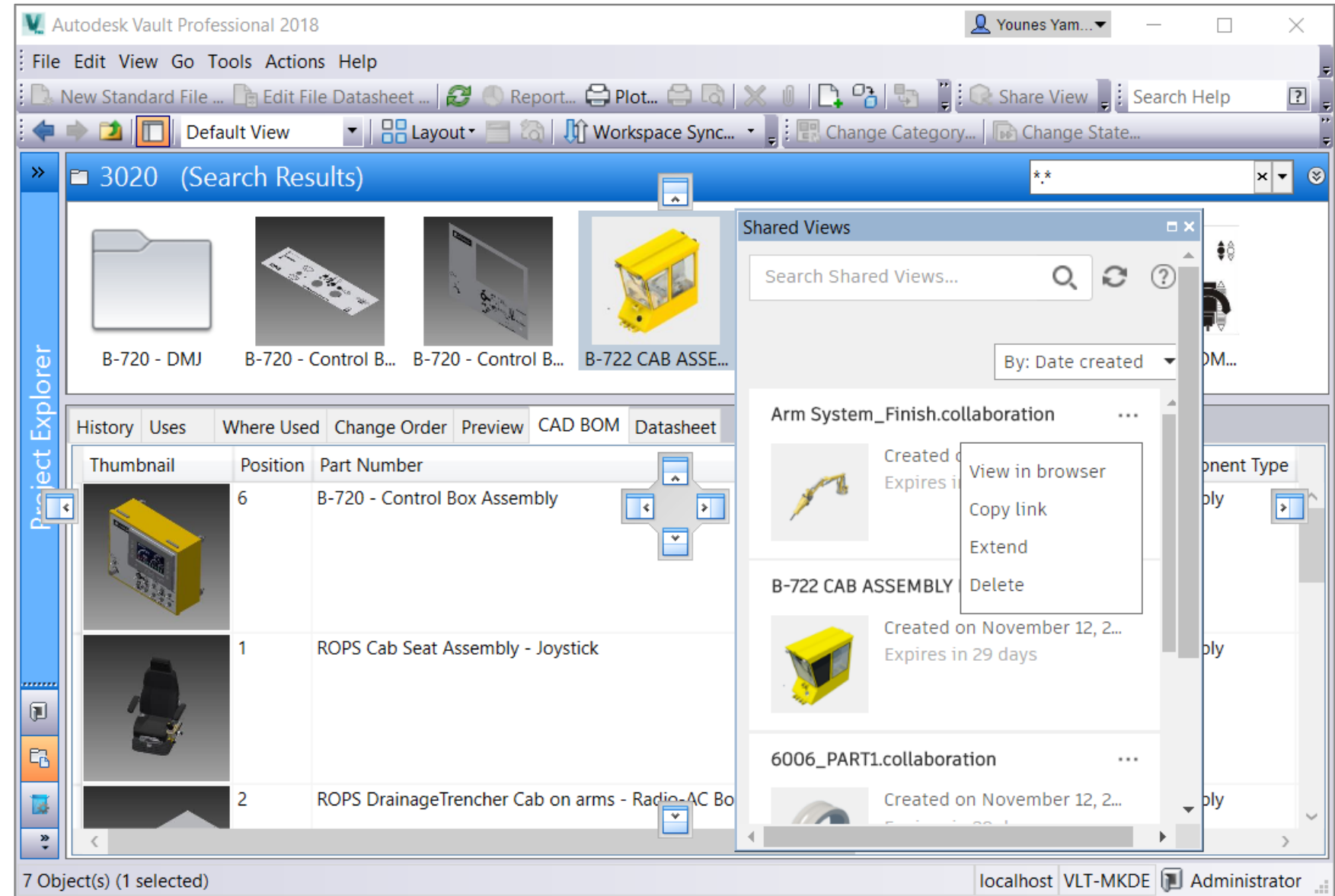
Model Browser, Properties



View Explode, Zoom in, measure,
walk through

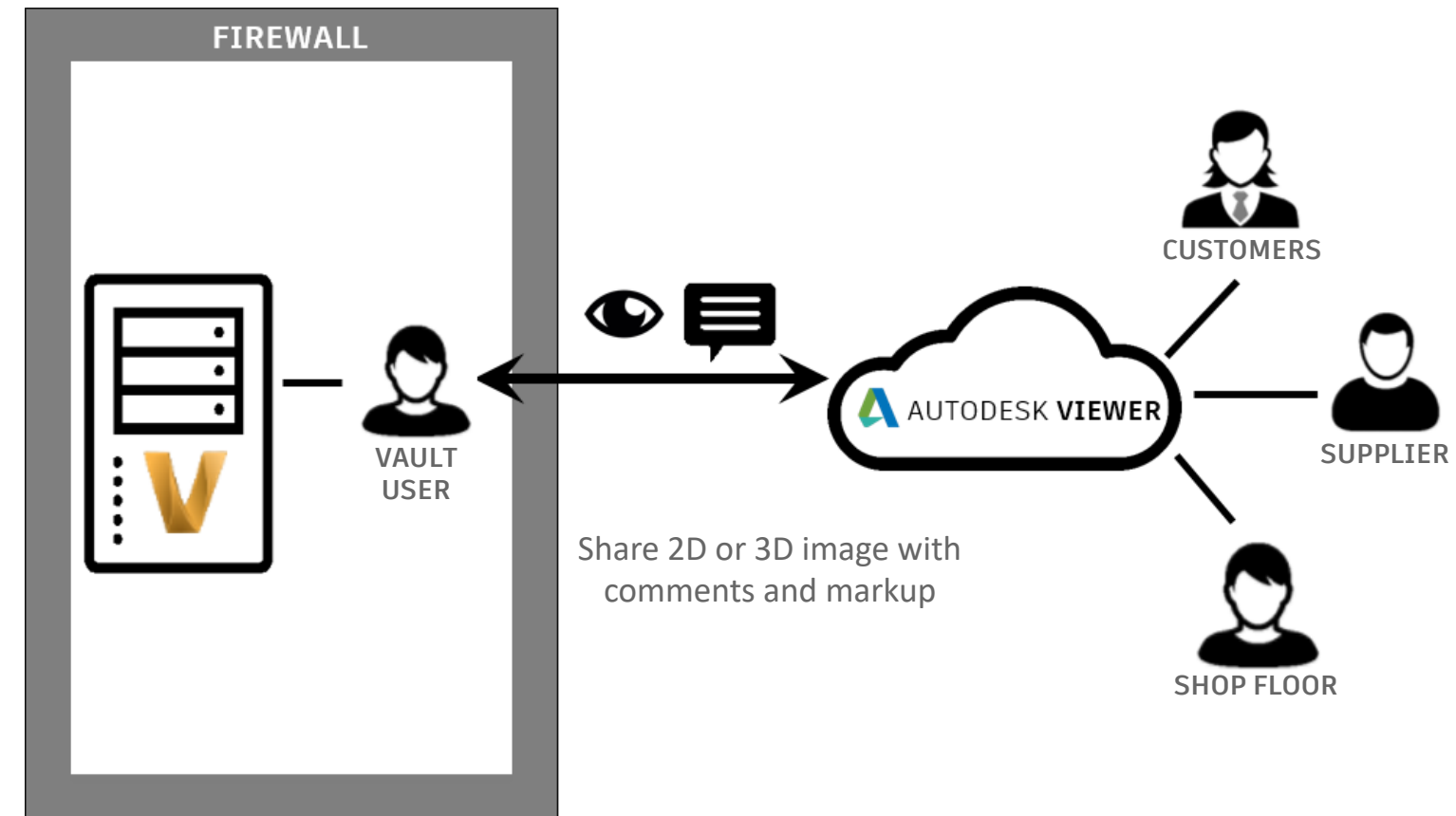
Design Engineers Access Shared Views Panel


- Access all Views shared by the user in one single user interface
- Shared Views Panel detachable
 - Dock/ undock & Hide/ unhide
- View Panel capabilities
 - Sync, Search, Navigate, Sort
 - Copy Link, View in Browser
 - Reply & Resolve comment
 - Extend & Delete a Shared View
 - Shared Views expires automatically after 30 days and are deleted



Shared Views – Get Feedback Summary

- Collaborate on a visual representation of your model or design online while your designs are always protected
- All collaborators can view the shared view and add comments in [Autodesk Viewer](#).
- Receive comments and feedback directly inside Vault





Do you believe your engineering team can benefit from Shared Views capability?

Yes

No

Total Results: 0



Autodesk delivered new ways to work with files in the cloud. Rate your feeling about sharing files in the Cloud?

very
comfortable

comfortable

neither

uncomfortable

very
uncomfortable

Total Results: 0

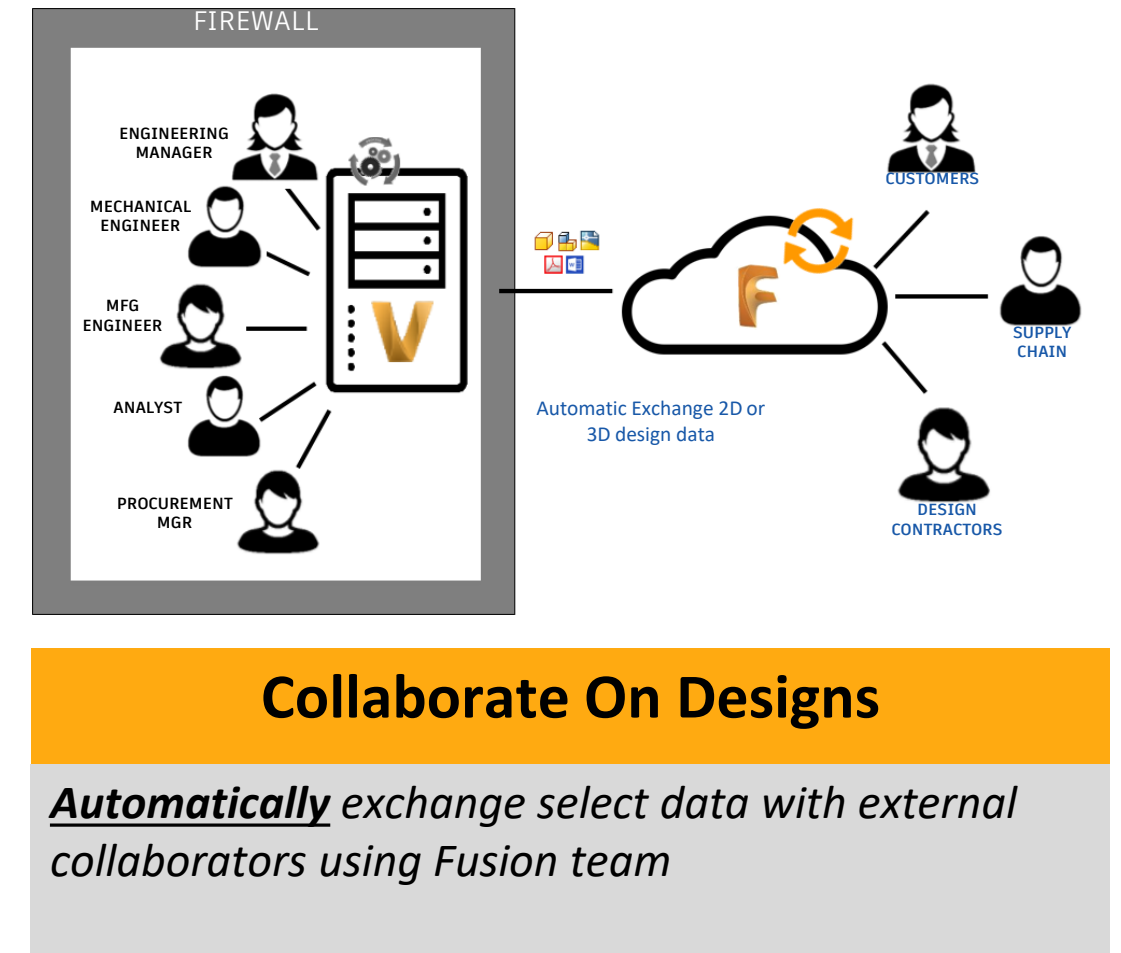
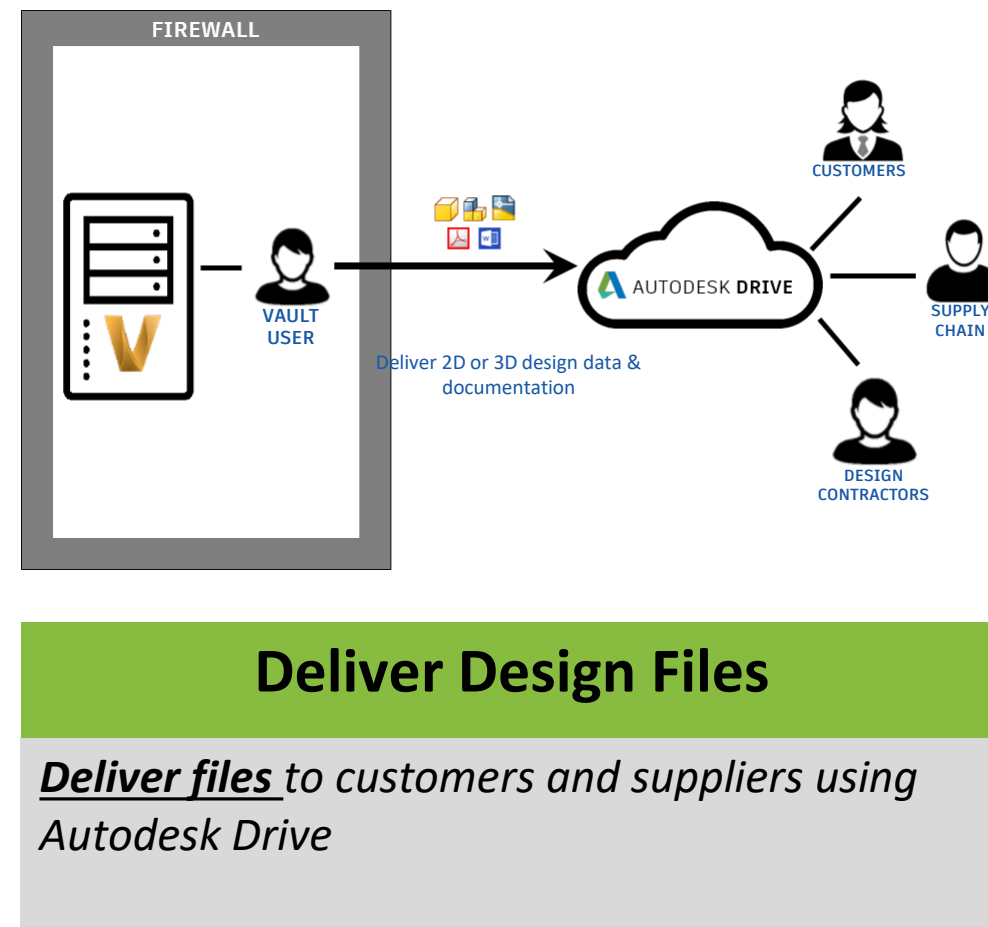
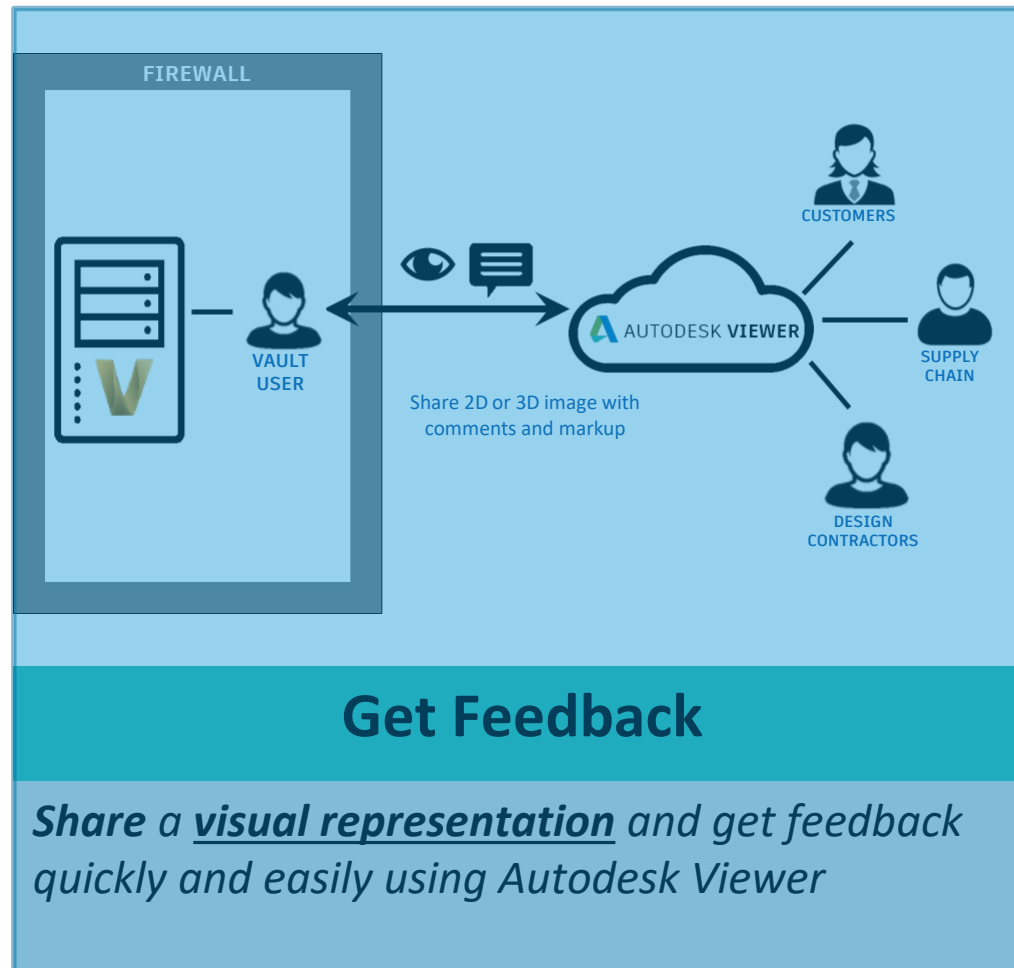
Does your engineering team share native design data with partners, customers or 3rd parties for downstream manufacturing workflows?

Yes

No

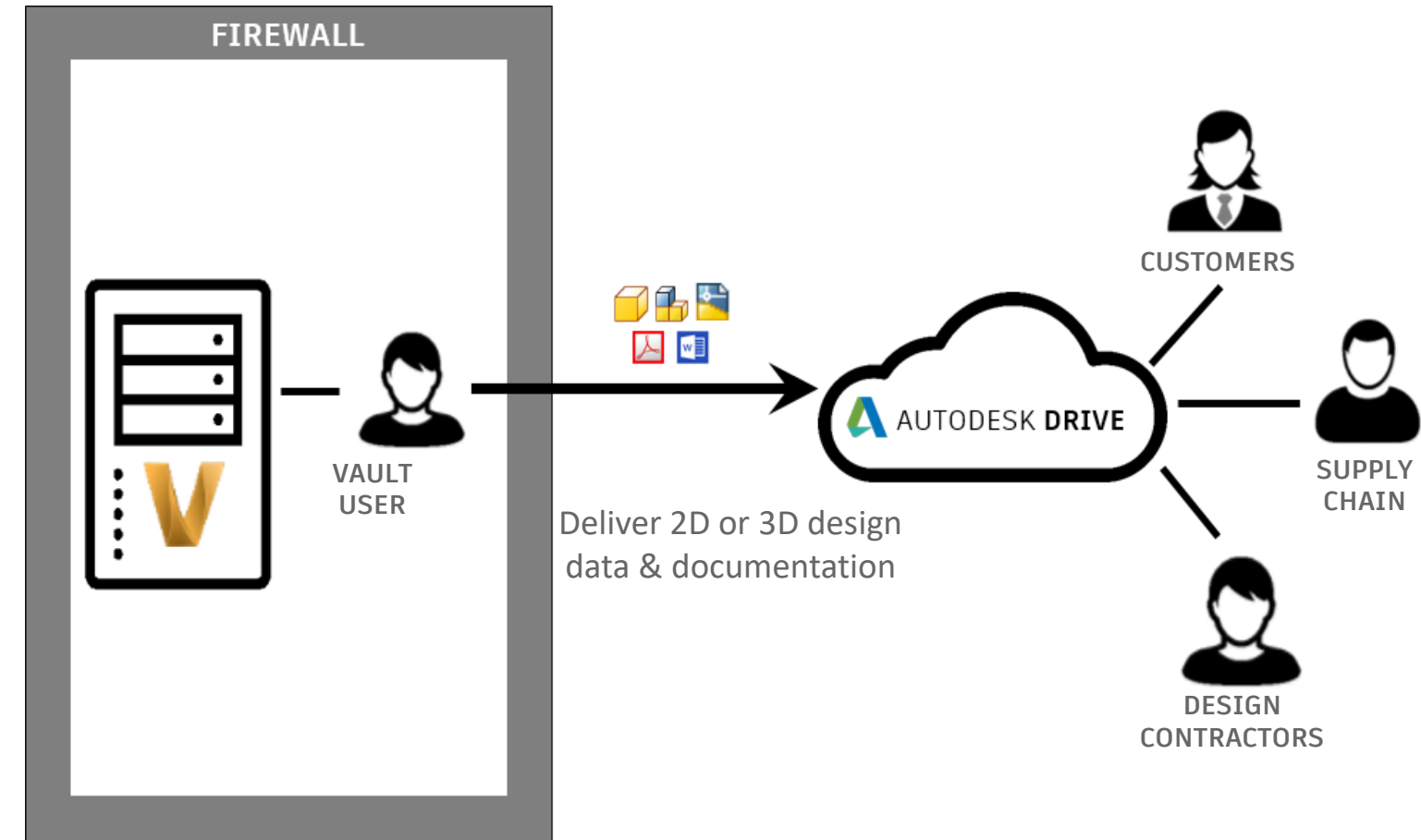
Total Results: 0

External Collaboration

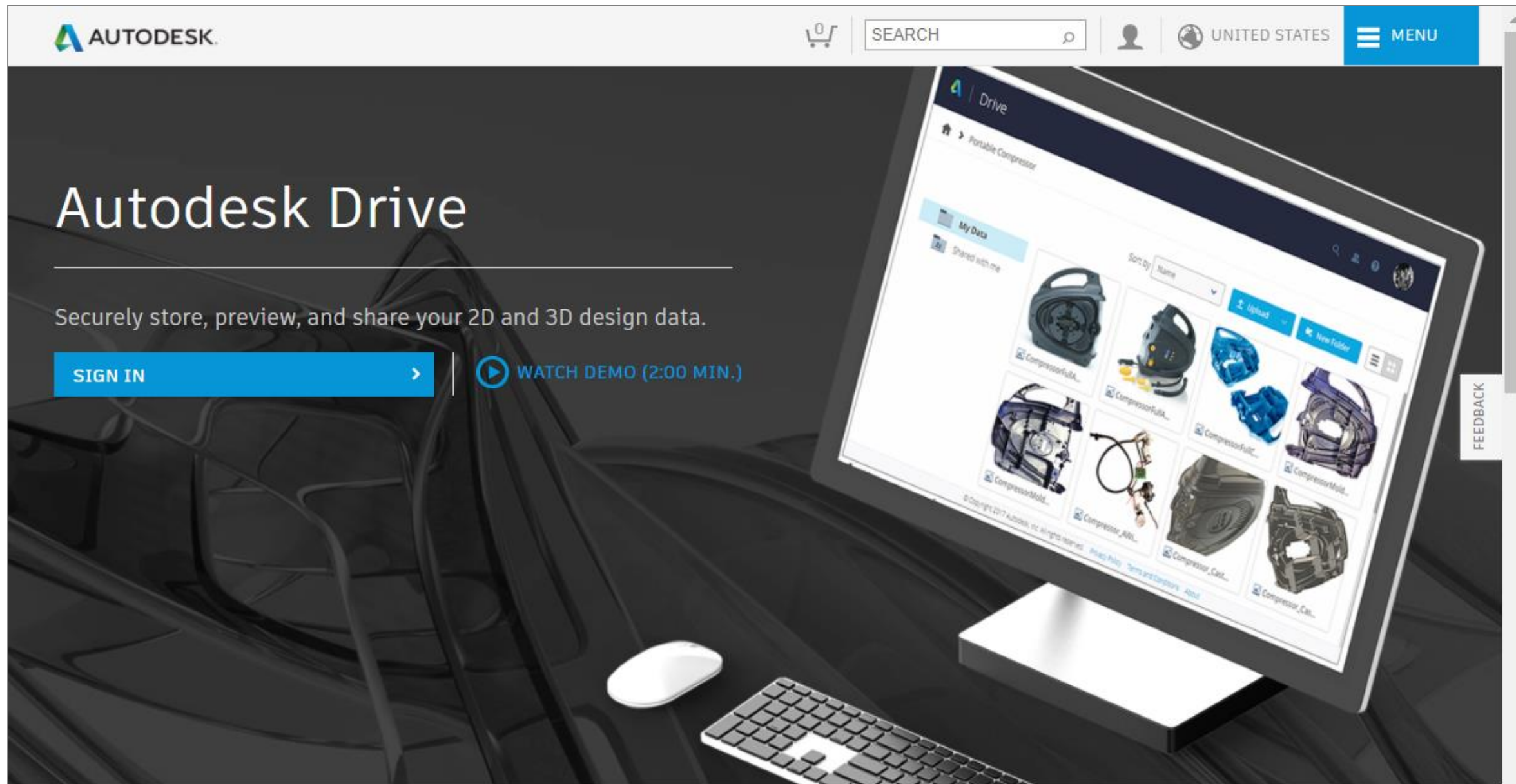


Deliver Design Files – Autodesk Drive

- Extend Pack & Go capability to integrate Autodesk Drive and Fusion Team
- Add Autodesk Drive as subscription benefit for Vault Workgroup and Professional
- Leverage Desktop Connector to handle properly CAD references



Deliver Design Files - Autodesk Drive



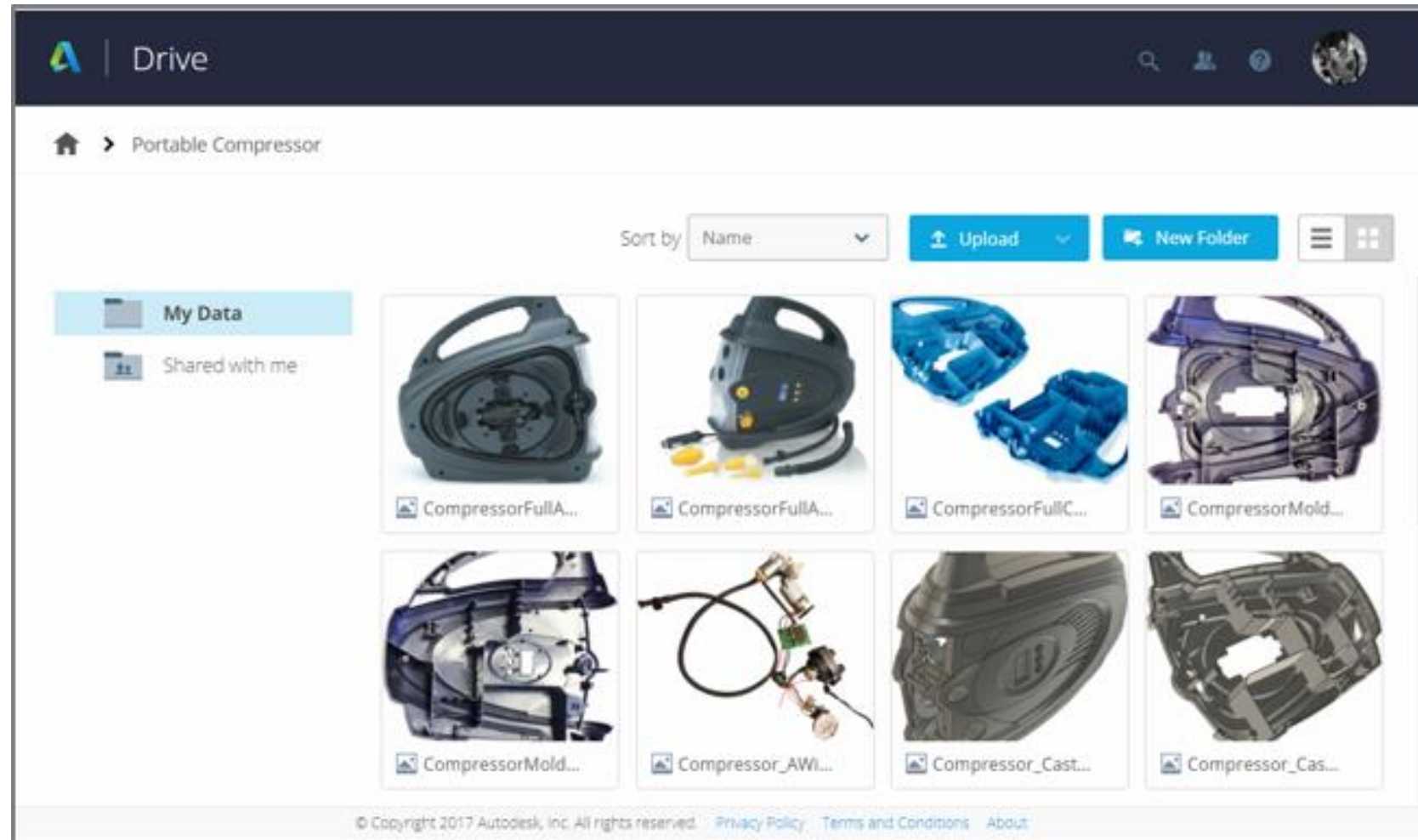
Smart Storage

**Made for your
workflows**

**The Cloud, on your
Desktop**

Deliver Design Files - Autodesk Drive

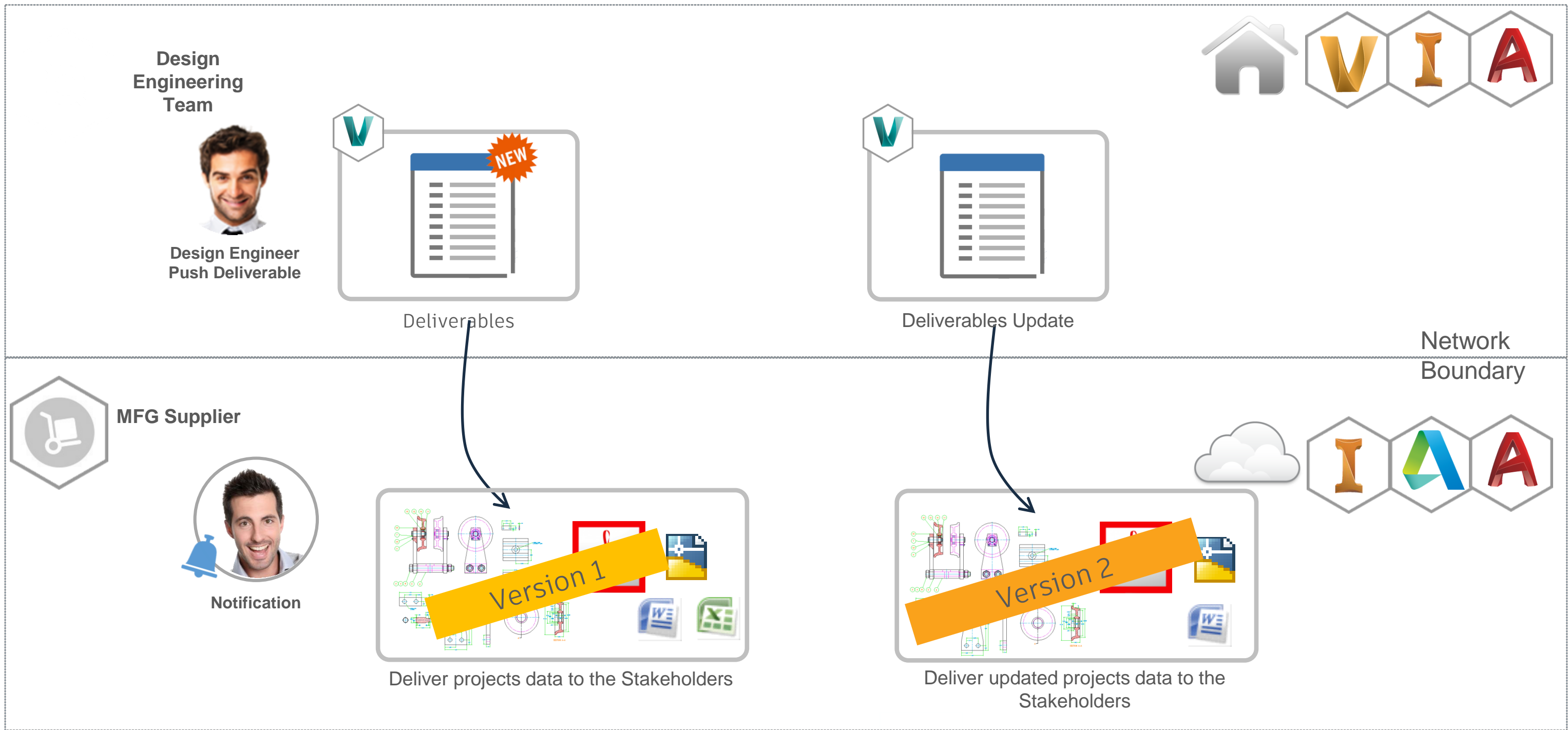
Web Access



Desktop Access

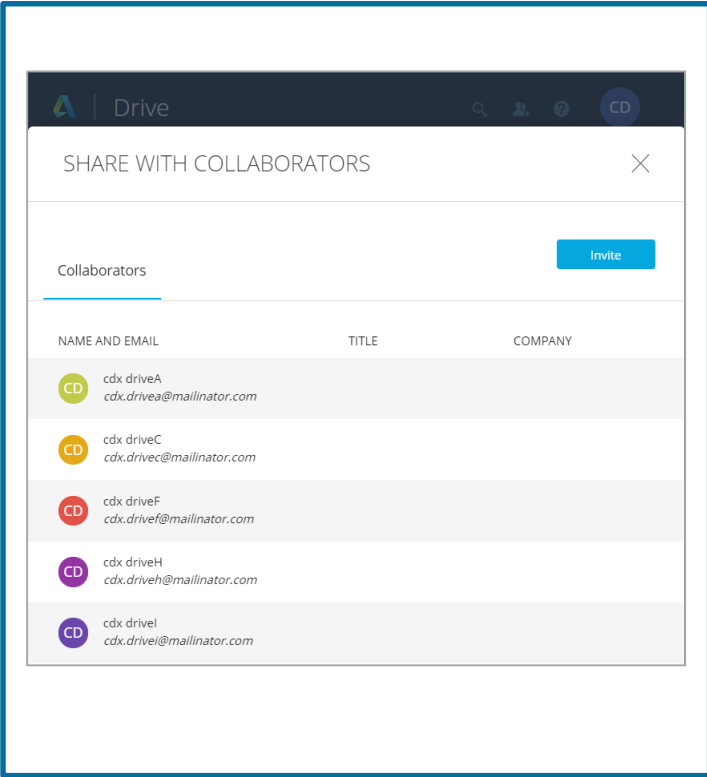


Deliver Design Files - Simple Workflow



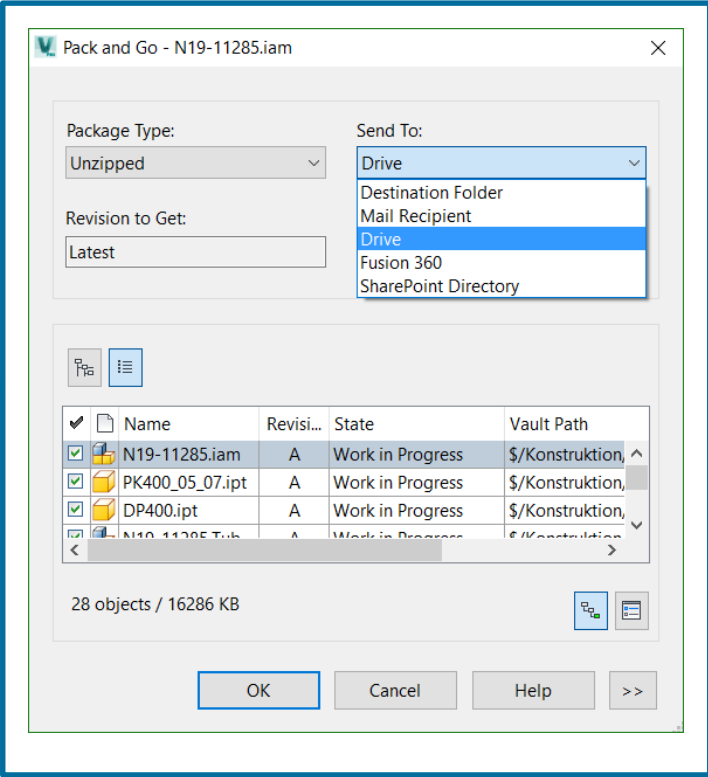
Deliver Design Files - Simple Workflow

Design Engineer/
Project Manager



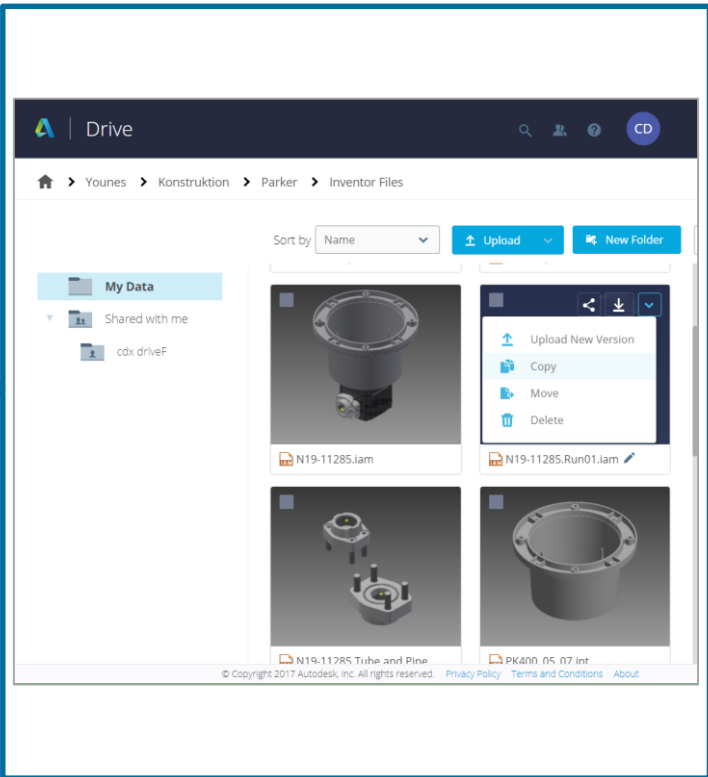
Project Setup

Design Engineer/
Project Manager



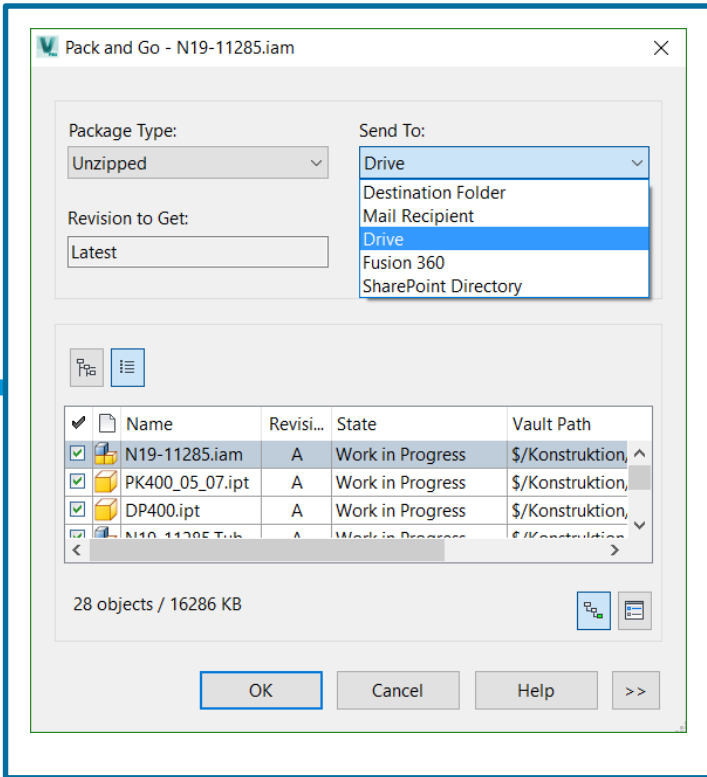
Share design data
from Vault

MFG Supplier/
customer



Access design
data in Cloud

Design Engineer/
Project Manager



Update design
data from Vault

Design engineer
use Pack & Go to
publish data to
Drive

Pack & Go including Transmittal Report

Pack and Go - N19-11285.iam

Package Type:
Unzipped

Revision to Get:
Latest

Send To:
Drive

Destination Folder
Mail Recipient
Drive
Fusion 360
SharePoint Directory

	Name	Revisi...	State	Vault Path
<input checked="" type="checkbox"/>	N19-11285.iam	A	Work in Progress	\$/Konstruktion,
<input checked="" type="checkbox"/>	PK400_05_07.ipt	A	Work in Progress	\$/Konstruktion,
<input checked="" type="checkbox"/>	DP400.ipt	A	Work in Progress	\$/Konstruktion,
<input checked="" type="checkbox"/>	N19-11285.Tub...	A	Work in Progress	\$/Konstruktion,
<input checked="" type="checkbox"/>	T7DS-00M0.iam	A	In Review	\$/Konstruktion,

28 objects / 16286 KB

☒ Append transmittal report to package

Template File:
C:\Program Files\Autodesk\Vault Professional 2018\Explorer\Report ...

OK

Cancel

Help

<<

Browse For Folder

Name

Drive

My Data

Foster

Kevin Share

Pack and Go 1

pig

Related data

Younes

Shared with Me

OK

Cancel

Transferring files

Drive

T7DS-00M0 (Cartridge, Vane Pump).iam

AUTODESK.

Transmittal Report

Generated By : Administrator

Date : 09.11.2017 14:57:24

Source : \$/Konstruktion/Workgroups/Cabs/3020/

Action : Pack and Go

Destination : C:\Users\yammouy\Fusion\Autodesk Vault Alpha - Fusion Team\Cabine\Deliverables

Transmitted Files:

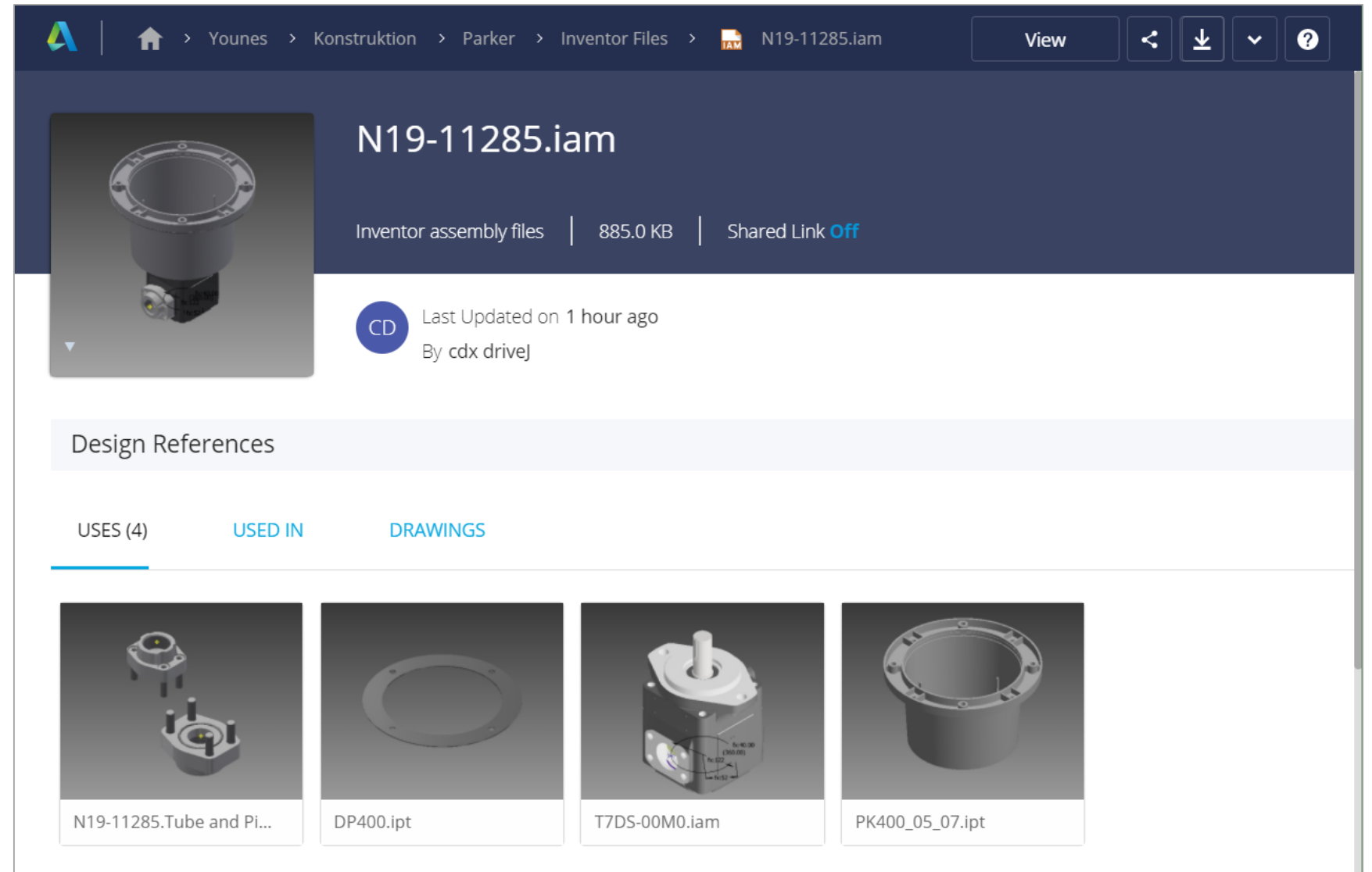
Name	Revision	State	Vault Folder	Date Version Created
B-722 CAB ASSEMBLY.iam	A	Work in Progress	\$/Konstruktion/Workgroups/Cabs/3020/B-722 CAB ASSEMBLY.iam	07.11.2017 15:39:36
Throttle - Knob For Handle.ipt	A	Work in Progress	\$/Konstruktion/Workgroups/Control Boxes & Switches & Handles/Throttle - Knob For Handle.ipt	07.11.2017 14:29:31
B-720 - Control Box Assembly.iam	A	Work in Progress	\$/Konstruktion/Workgroups/Control Boxes & Switches & Handles/B-720 - Control Box Assembly.iam	07.11.2017 15:10:34
GPS Screen and Clamp mount assembly.iam	A	Work in Progress	\$/Konstruktion/Workgroups/Laser & Hydraulic/GPS Screen and Clamp mount assembly.iam	07.11.2017 15:10:34
1515-2966.iam	A	Work in Progress	\$/Konstruktion/Workgroups/1515/1515-2966.iam	07.11.2017 15:03:34
ROPS Drainage trencher cab on arms - Cab Basic 2015-3020 WITH PARCEL SHELF Assembly.iam	A	Work in Progress	\$/Konstruktion/Workgroups/Cabs/ROPS Drainage Trencher Cab on arms/ROPS Drainage trencher cab on arms - Cab Basic 2015-3020 WITH PARCEL SHELF Assembly.iam	07.11.2017 15:38:17

Transmittal report is created and added to Drive

Pack & Go support Autodesk Drive

Access Design Data in Autodesk Drive

- Collaborator can access design files in Autodesk Drive
- Versions
- Design References
 - Uses, Used In
 - Drawings tabs
- Viewing capabilities



Pack & Go for BIM 360 Docs and Fusion Team

AUTODESK® DRIVE

Data storage for individuals and small teams

- 25 GB of storage for you
- Share design data 1:1
- Preview files in browser
- Desktop and web

Subscription benefit for
Vault Workgroup/ Pro

BIM 360 DOCS

For architecture, engineering, and construction teams

- Unlimited storage and projects
- Access controls and permissions at file folder level
- Version control and rollback
- Web, phone, and tablet access for markups and design review

Subscribe to BIM 360 Docs

FUSION TEAM

Data management for product design & manufacturing teams

- 500 GB of storage per user
- Project-based team collaboration
- User access controls & management
- Desktop, web, and mobile
- Markup tools
- Live design review

Subscribe to Fusion
Team/PDMC





Do you believe your engineering team can benefit from Deliver Design Files capability?

Yes

No

Total Results: 0



**Does your engineering team collaborate on native CAD data like
DWGs, Inventor files with external consultants??**

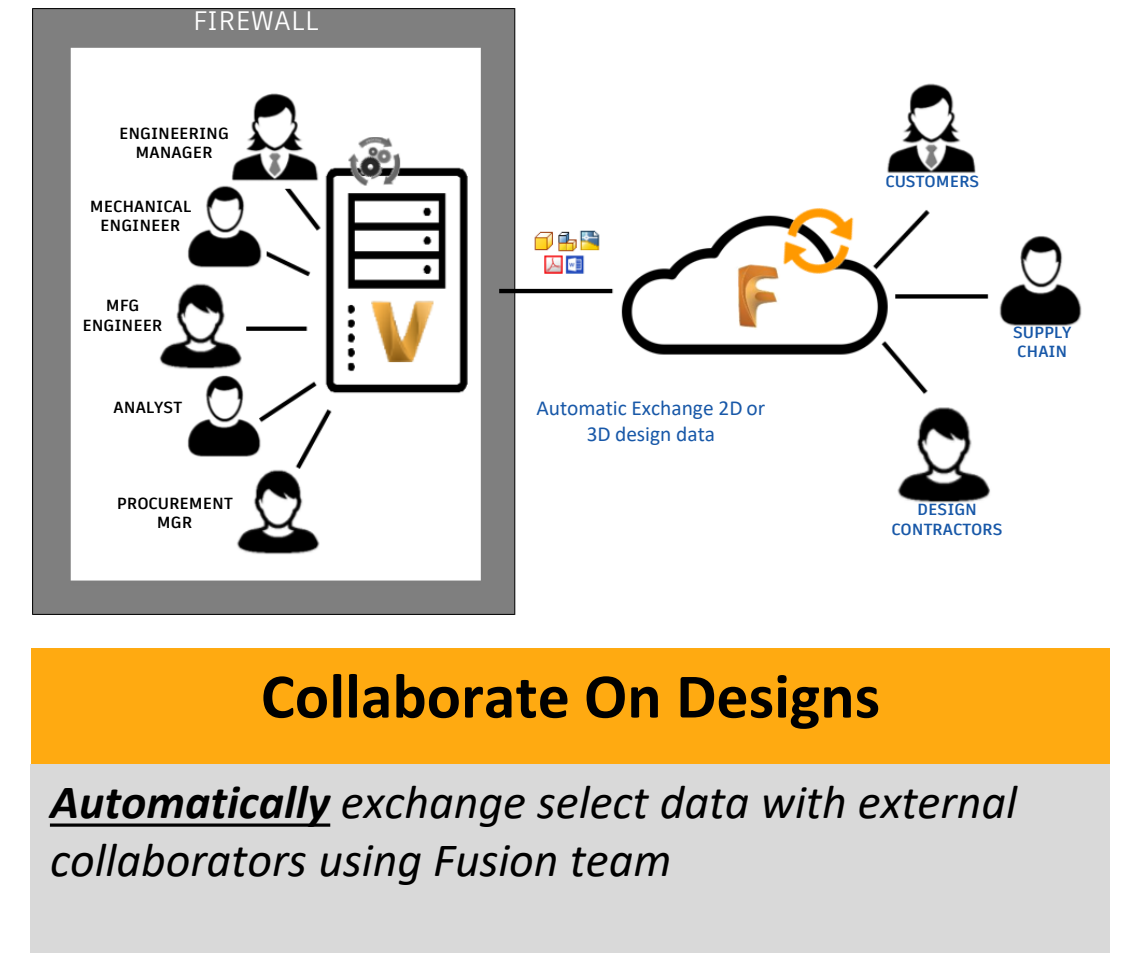
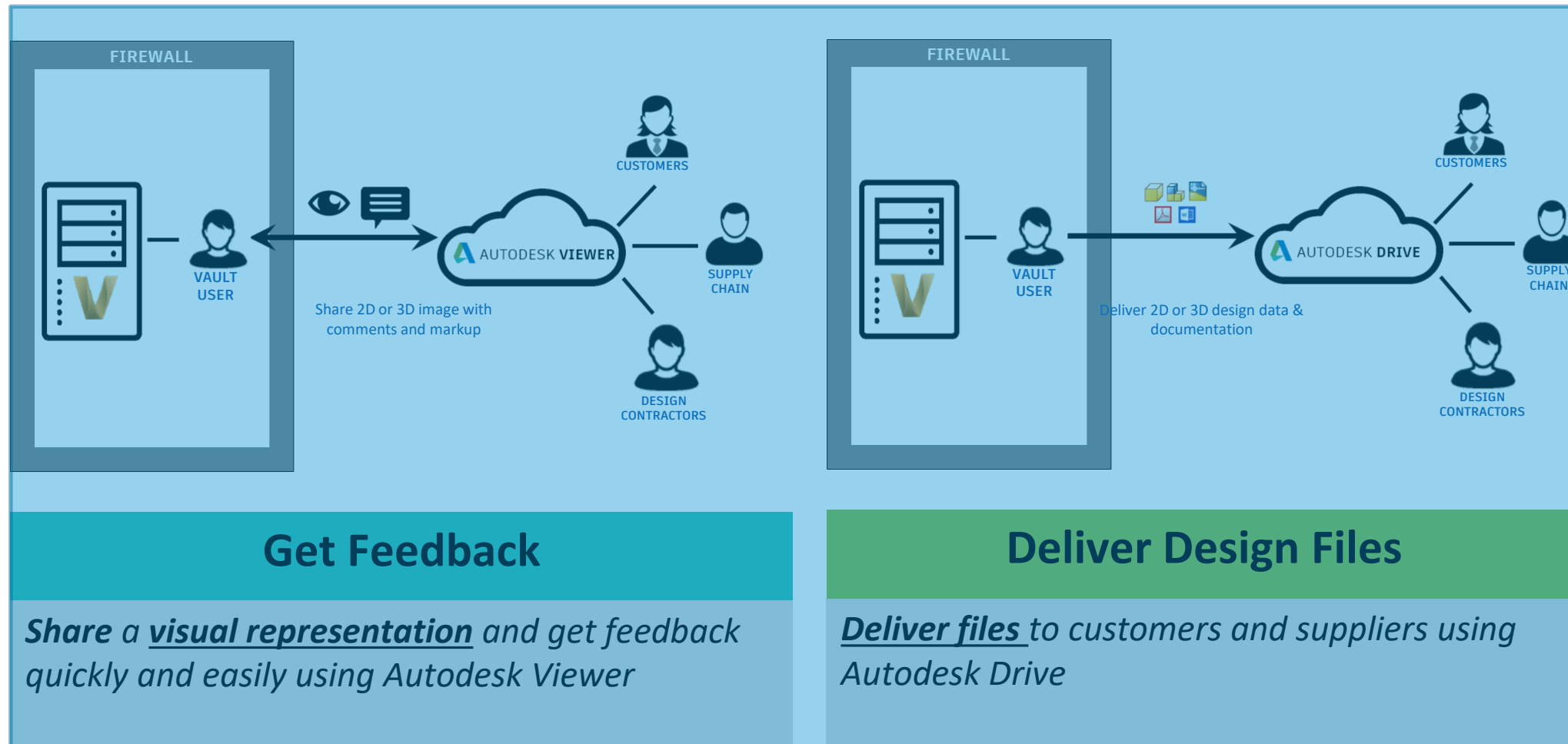
Yes

No

I don't
know

Total Results: 0

External Collaboration



Collaboration on Designs – Challenges

- “Need an easy and **triggered** way for design engineers to share project related **up-to-date released** design files with outside suppliers or customers for consumption”
- “We would like to outsource some CAD files and their references to another company so they can **clean up** the assemblies and **create the drawings** and get them back to Vault w/o lost of any **CAD references**”
- “We would like to contract external firms with **design tasks for sub assembly** due to time constraints leveraging available **up-to-date templates and standard components** managed in Vault in cost effective way”



Suppliers

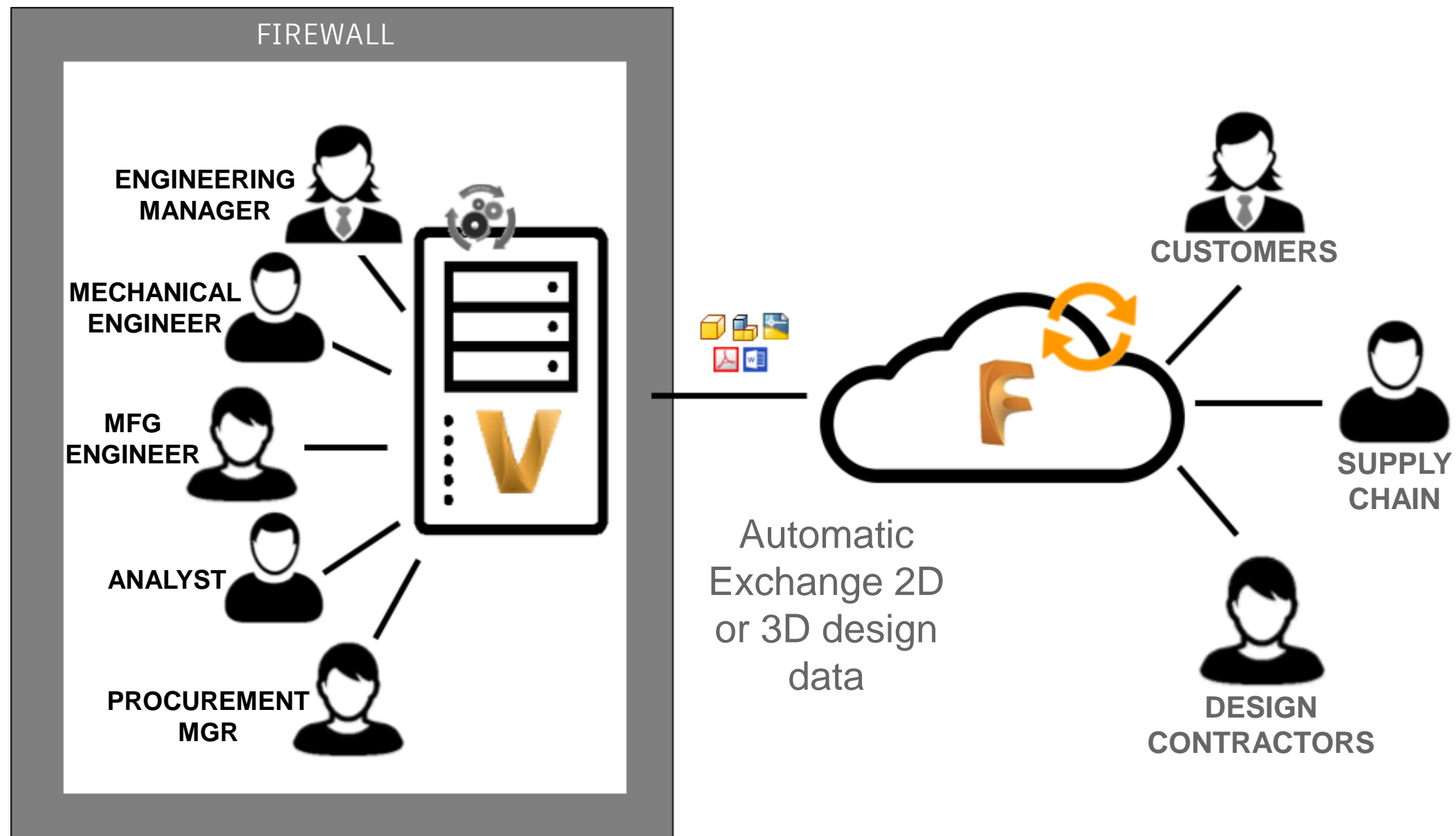


Customers

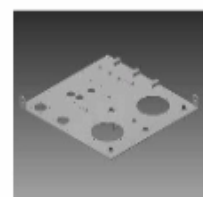


Design
Contractors

Collaboration on Designs – Project Sync



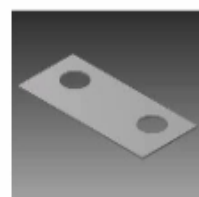
Inventor Files



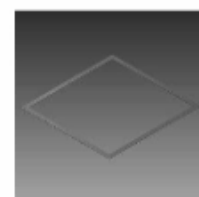
N09-02875.iam



N09-02875-01.ipt



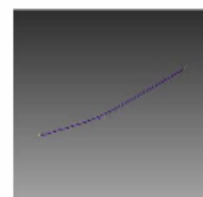
N09-02875-02.ipt



N09-05220.ipt



N19-1128



N19-30184.Route...



N19-30184.Route...



N19-30184.Run0...







N19-30184.Run0...



N19-30184

History Uses Where Used Change Order Preview

Latest Work in Progress

FileName	Revision	Status (Historisch)	Erstellt von	Eingeche
 PK400_05_07.ipt	A	Work in Progress	Administrator	21.09.20
 T7DS-00M0.iam	A	In Review	Administrator	21.09.20
 N19-30184.Tube and ...	A	Work in Progress	Administrator	21.09.20
 N19-00506.iam	A	Released	Administrator	21.09.2017

Vault Settings

Files Visualization Behaviors Items Change Orders Collaborate Custom

Options

☐ Enforce Unique File Names

Find Duplicates

☐ Disable Check In of Design Files

Working Folder



Define Working Folder Options

Define...

PDF Options



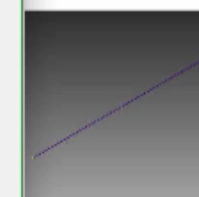
Configure PDF Publishing Options

Options...

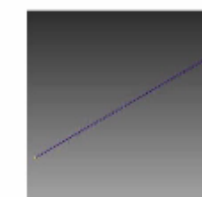
Close

Help

Search Inventor Files



N19-30184.Route...



N19-30184.Route...



PIPE_N07-04140.i...



PIPE_N07-04155.i...

Shared Views



Von: Erstellungsdat

GX620-Dip_Stick.collaboration

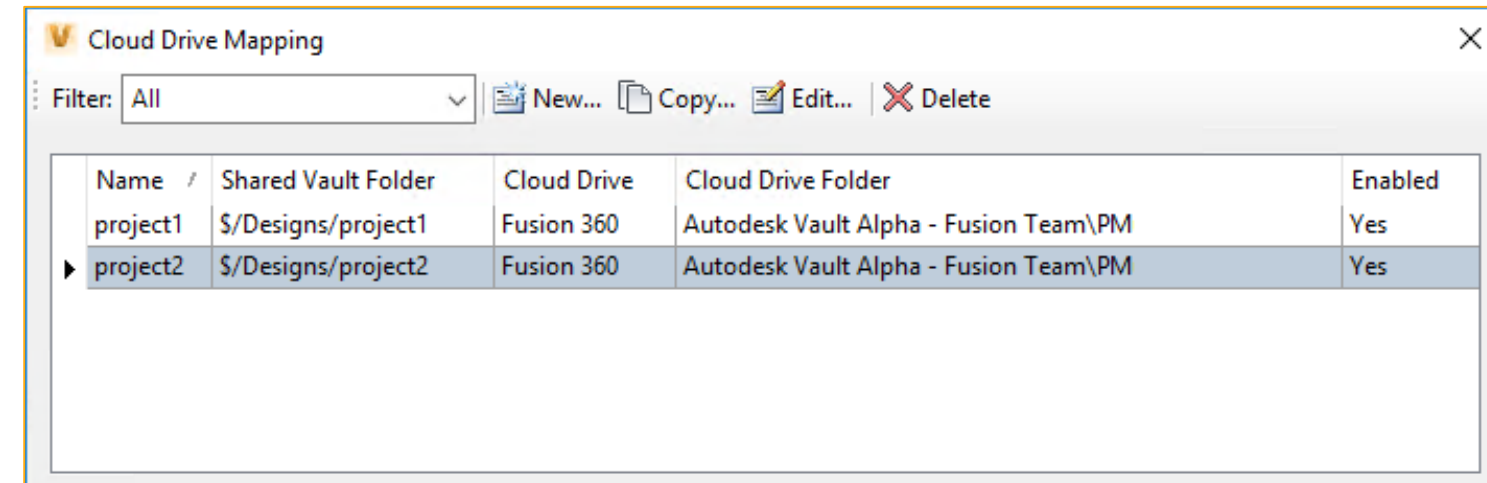
Erstellt am 5. Februar 2018
Läuft ab in 8 Tage

GX620 Housing.collaboration

Erstellt am 5. Februar 2018
Läuft ab in 8 Tage

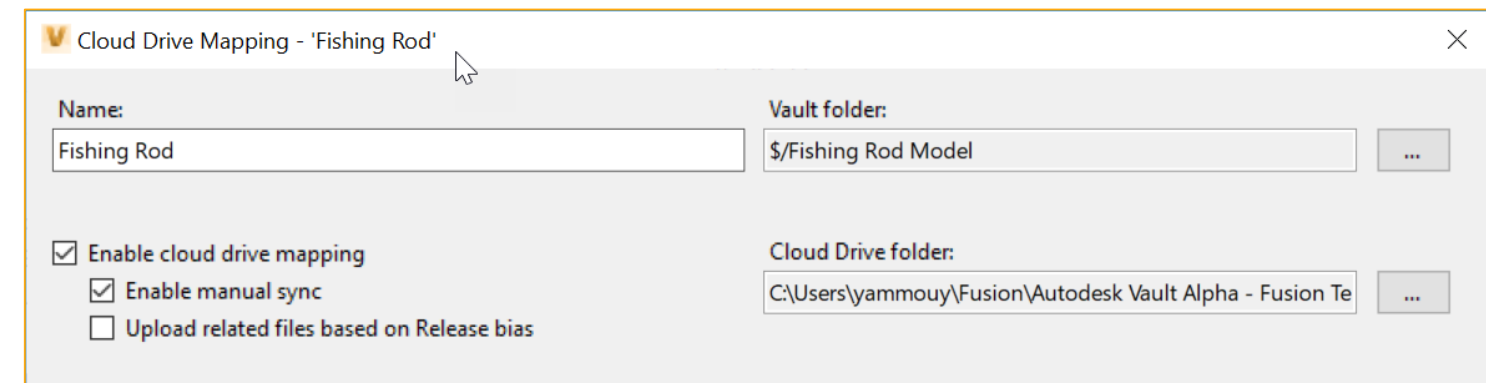
Selectively Exchange of CAD documents

- **Cloud Drive Mapping** delivers the flexibility to exchange with each collaborator the relevant projects design data
- Disable „**Enable Manual Sync**“ option to trigger sync based on processes
- CAD aware and Upload related files based on Release bias
- Collect all **project links** supports customers to exchange project relevant design data independent from where the files reside
- **Disable Cloud drive mapping** after project completion



The screenshot shows the 'Cloud Drive Mapping' dialog box. It has a filter set to 'All' and buttons for 'New...', 'Copy...', 'Edit...', and 'Delete'. Below is a table with the following data:

Name /	Shared Vault Folder	Cloud Drive	Cloud Drive Folder	Enabled
project1	\$/Designs/project1	Fusion 360	Autodesk Vault Alpha - Fusion Team\PM	Yes
▶ project2	\$/Designs/project2	Fusion 360	Autodesk Vault Alpha - Fusion Team\PM	Yes



The screenshot shows the 'Cloud Drive Mapping - Fishing Rod' dialog box. It contains the following fields and options:

- Name:** Fishing Rod
- Vault folder:** \$/Fishing Rod Model
- ☒ **Enable cloud drive mapping**
 - ☒ **Enable manual sync**
 - ☐ **Upload related files based on Release bias**
- Cloud Drive folder:** C:\Users\yammouy\Fusion\Autodesk Vault Alpha - Fusion Te

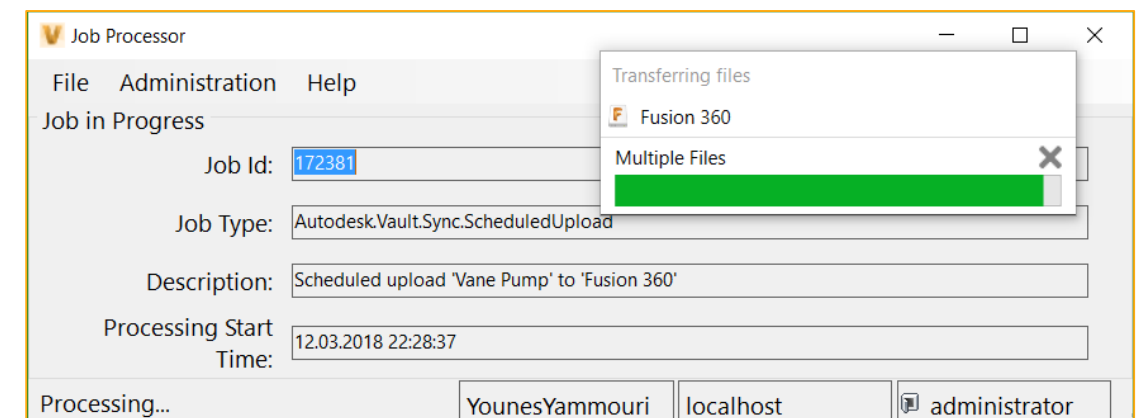
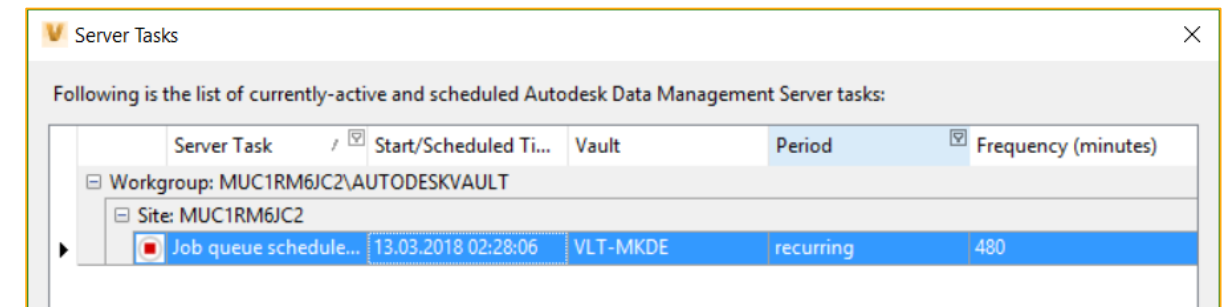
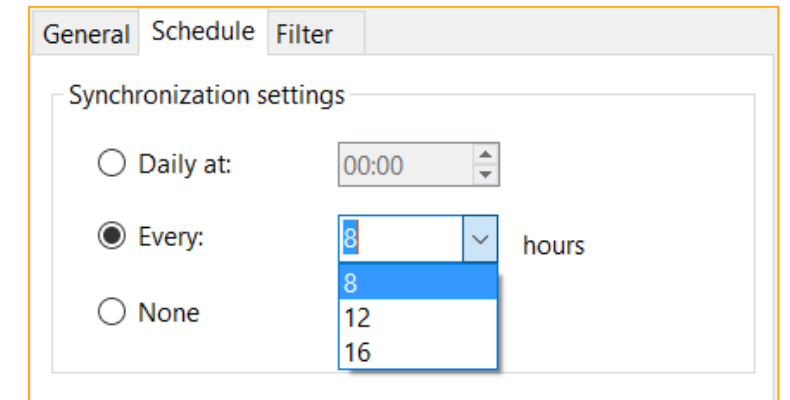
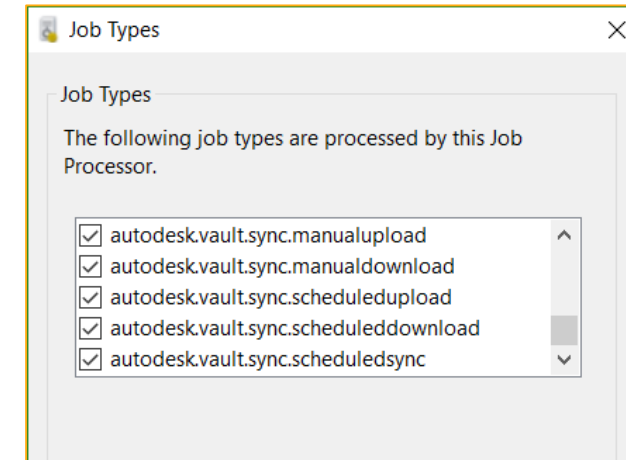
Selectively Exchange of CAD documents

- Synchronization can work in either direction or both directions
 - Option to apply to subfolders
- Scheduled Exchange based on interval or daily time
- Filter capabilities helps administrator make sure collaborator has access only to the subset of project data he needs for his tasks

The image displays three overlapping screenshots of a software interface for managing CAD document synchronization. The top-left screenshot shows the 'General' tab with a 'Select folder:' field set to '\$/Designs' and three radio button options under 'Action': 'Upload to cloud drive' (selected), 'Download from cloud drive', and 'Bi-directional sync'. A checkbox 'Apply selected action to subfolders' is checked. The top-right screenshot shows the 'Schedule' tab with 'Synchronization settings' including 'Daily at: 00:00', 'Every: 8 hours' (with a dropdown menu open showing options 8, 12, and 16), and 'None'. The bottom screenshot shows the 'Filter' tab with 'Property:' set to 'Project' and 'Condition:' set to 'contains'. Below these are 'Add', 'Replace', and 'Remove' buttons. A text area lists criteria: 'State contains Released' and 'Project contains Vane Pump'. A 'Preview...' button is at the bottom right.

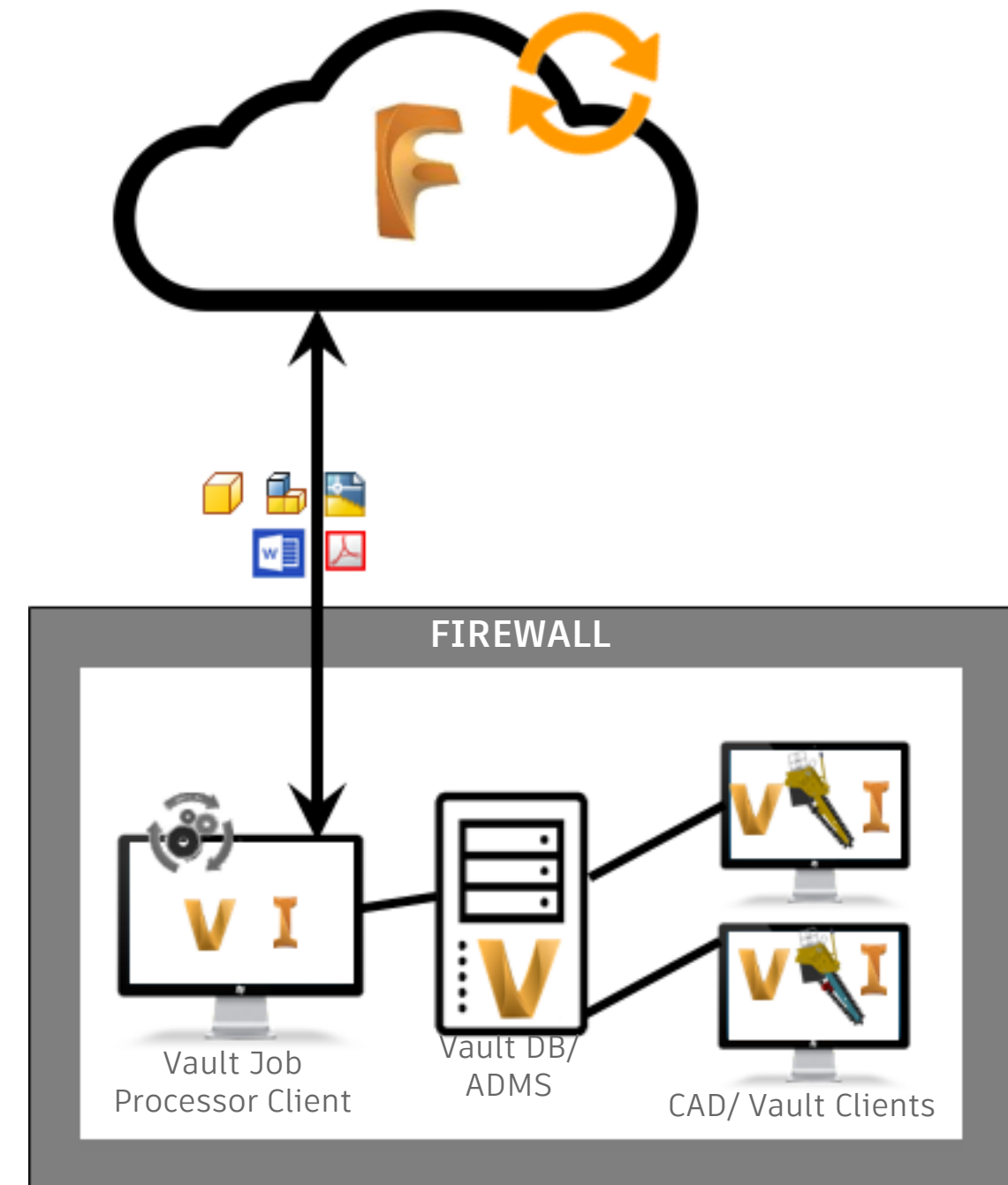
Selectively Exchange of CAD documents

- 5 new OOTB job types
 - Manual upload and download
 - Scheduled upload and download
 - Scheduled sync (bi-directional)
- At scheduled times, a job is added to the queue for execution / consumption
- Scheduled jobs can be viewed with other background tasks in ADMS console
- Desktop Connector is required to be installed on Job Processor machine as well as admin machine to configure the mapping



Collaboration on Designs – Project Sync

- Bi-directional exchange of CAD documents securely and transparently
- CAD awareness & folder links support
- Share selective data with external collaborators
- Project Sync creates jobs and adds them to the Job Queue to be executed automatically
- Create new Project in Fusion Team & invite collaborators





Do you believe your engineering team can benefit from Project Sync capability to collaborate with design contractors or supply chain?

Yes

No

Total Results: 0

Did you participate in Vault Ideas and Vault Beta Program?

Yes in Vault
Ideas and Vault
Beta Program

Yes in Vault
Ideas only

Yes in Vault Beta
Program only

No. I do not
participate in any
of them

Total Results: 0

Beta & Vault Ideas



Make your voice heard

Vault Feedback Community:

<https://beta.autodesk.com/>

Vault Ideas:

Community can support ideas to surface the most relevant



GETTING STARTED

LEARN & EXPLORE

DOWNLOADS

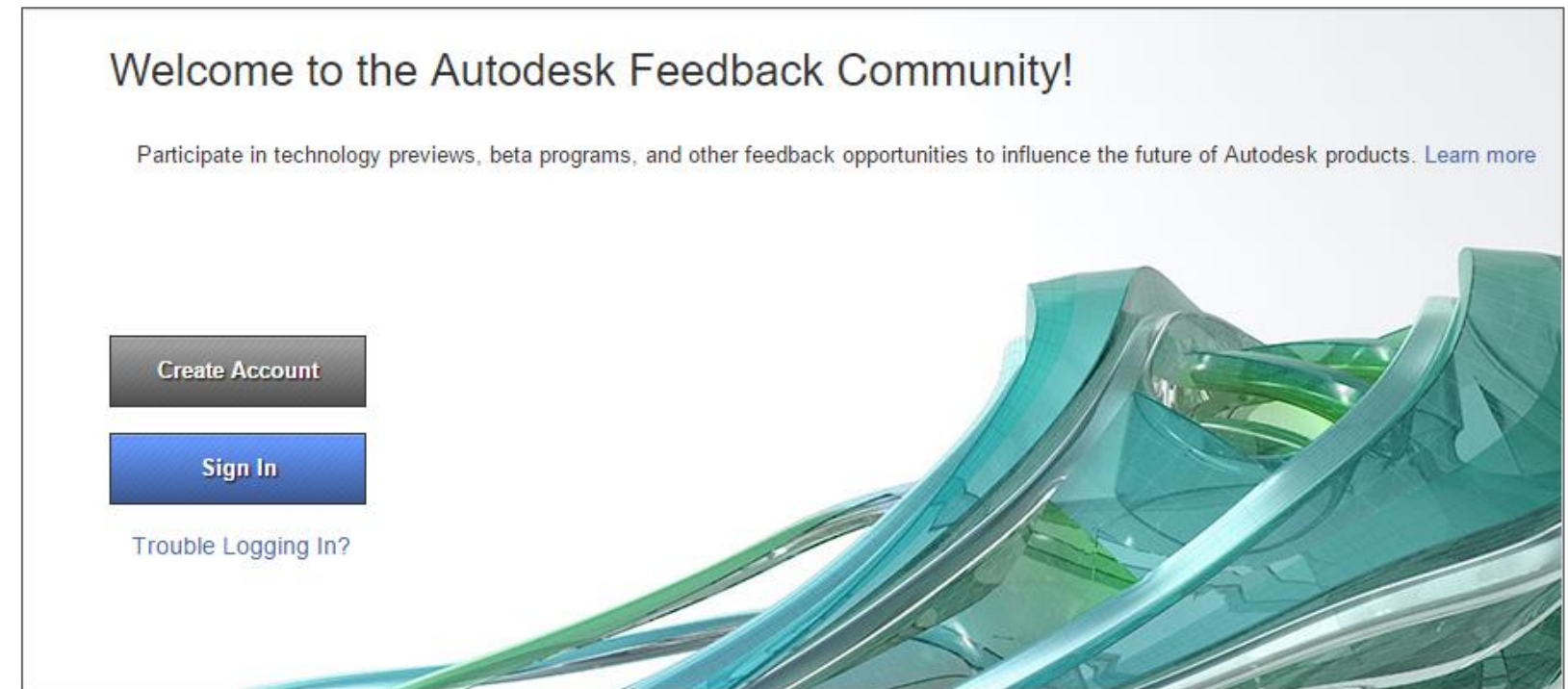
TROUBLESHOOTING

FORUMS

Idea Board



Search



Did you participate in Vault Ideas and Vault Beta Program

Yes in Vault
Ideas and Vault
Beta Program

Yes in Vault
Ideas only

Yes in Vault Beta
Program only

No. I do not
participate in
any of them

Start the presentation to activate live content

If you see this message in presentation mode, install the add-in or get help at PolleEv.com/app

Total Results: 0


Blog Resources

Autodesk Vault

- blogs.autodesk.com/vault

Autodesk Inventor

- blogs.autodesk.com/inventor

 Autodesk Vault - Under the Hood INVENTOR BLOG

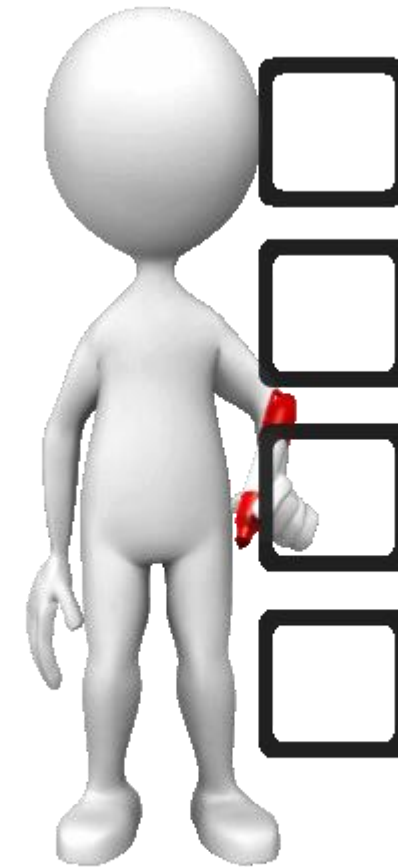
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