



Professionalize Your Workgroup: Vault

IM501956

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Autodesk

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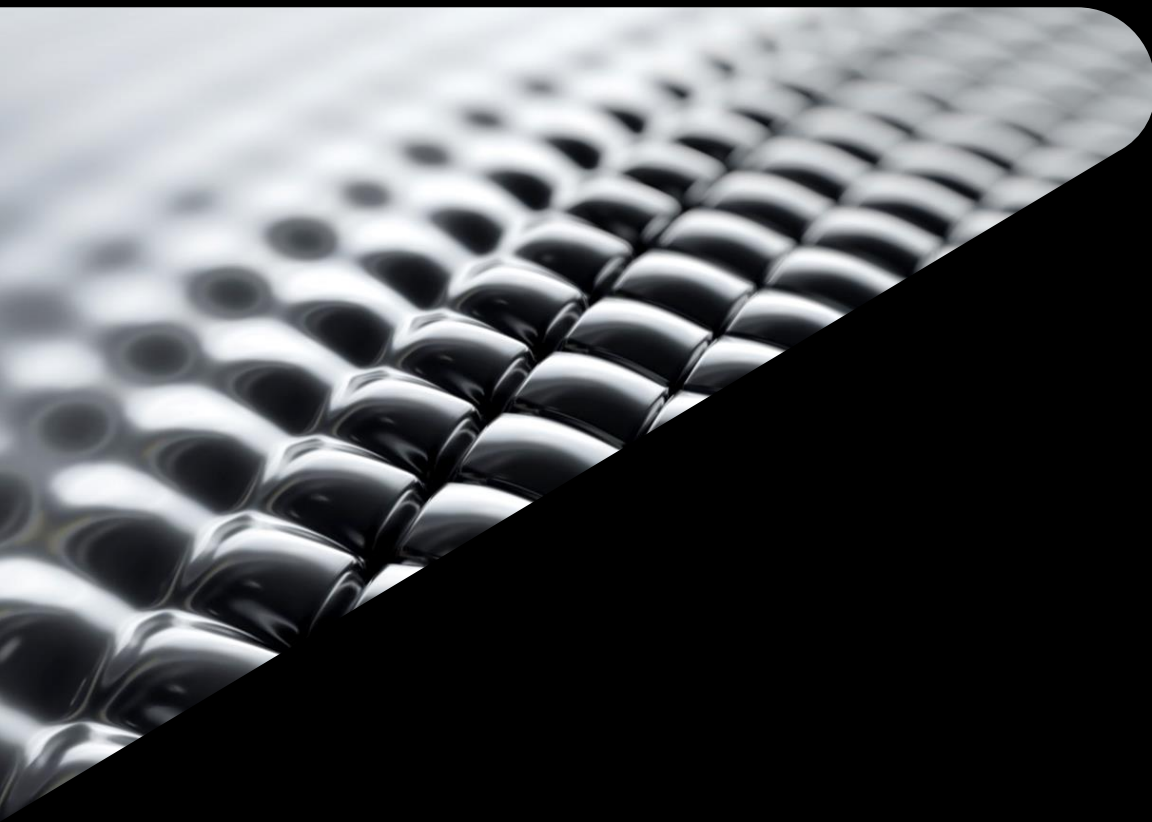
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A close-up, black and white photograph of a woven mesh texture, possibly a metal screen or a fine fabric, showing a grid of small, rounded openings. The texture is diagonal, running from the top-left towards the bottom-right.

Why This Class?

End of Sale



Overview

Overview

What we will cover

Why/How

- End of Sale
- Migration

Game Changers

- Vault Gateway
- Thin Client
- Vault Mobile
- Duplicate Search
- Project Sync

Overview

What we will cover

Game Changers

- 3rd Party CAD
- Vault for MAKE
- Engineering Change Notice/Order
- Items

Tried & True Capability

- Multi Site Replication
- Hot Back Up
- 3rd Party Connected Data

Overview

Assumptions

- You are using Vault Workgroup
- You use Lifecycle Management
 - Work In Process
 - Released
 - Etc...
- You use Categories/Rules
- You use Numbering
- You use Data Standard
- You use Reporting
- You use Plotting
- Copy Design

What this is not...

- Not about the features on the left
- Not a deep technical dive

About Me

30+ years in Design and
Manufacturing

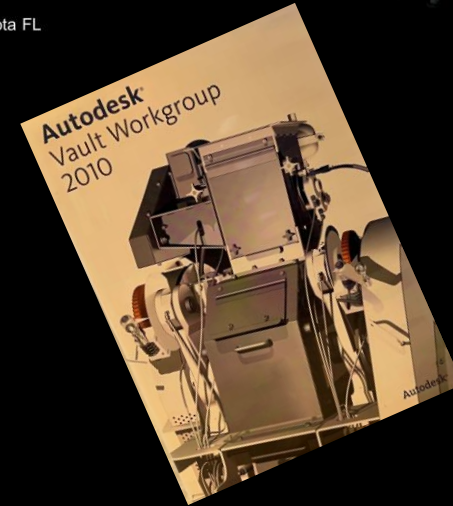
Joined Autodesk in 2016



DM2480: Maximizing Autodesk® Vault Verticals (Workgroup, Collaboration and Professional)

Allen Gager
KHS USA, Sarasota FL

 Autodesk University



 **CADLearning®**

 **AUTODESK UNIVERSITY**

Who are You?

- Vault Basic?
- Vault Workgroup?
- Vault Professional?
- What version?





End of Sale

End of Sale FAQ

Vault Workgroup

- Workgroup subscribers entitled to Vault Professional
 - For customers with an active subscription on 7/06/2022, Vault Workgroup Administrators gained access to both entitlements of Vault Workgroup and Vault Professional on 7/07/2022
 - This allows you to plan your migration
- What is the last version of Vault Workgroup?
 - Vault Workgroup 2023 is the last version

End of Sale FAQ

Vault Workgroup

- Is there an automatic migration in the system from Vault Workgroup to Vault Professional?
 - No
- When is the last date customers must upgrade from Vault Workgroup to Vault Professional?
 - Upgrade before the Vault Workgroup subscription expires to avoid downtime and inaccessibility

End of Sale FAQ

Vault Workgroup

- When was the last day to buy Vault Workgroup new subscriptions?
 - The last day to buy a new 3-year subscription to Vault Workgroup was July 6, 2022
 - The last day to buy a new 1-year subscription to Vault Workgroup was July 6, 2022
- When is the last day to renew Vault Workgroup subscriptions?
 - The last day to buy a renewal 3-year subscription to Vault Workgroup was July 6, 2022
 - The last day to buy a renewal 1-year subscription to Vault Workgroup is July 6, 2023
- When will Vault Workgroup no longer be supported?
 - Vault Workgroup 2023 will continue to be supported using the standard product support lifecycle



Migration

Workgroup to Professional

Migration

Workgroup to Professional

Vault Server:

1. Take a full backup of the current Vault Workgroup (for safety): [Back Up or Restore a Vault.](#)
2. Install the Vault Professional Server: [Vault Server Installation.](#)
 1. The server installer will remove the workgroup installation and install the Vault Professional
 - a. Vault Server supports 2 versions back
 - b. My suggestion is to migrate same version
3. Install the Vault Server updates.
4. Open the ADMS Console and migrate the database [Migrate a Database.](#)

Migration

Workgroup to Professional

1. In case step #2 fails (for example incompatible database version) perform the following steps:
Uninstall Vault Workgroup Server: [Repairing, Uninstalling and Reinstalling the Vault Server Software](#).
2. Install Vault Professional Server (do not use the existing database) [Vault Server Installation](#).
3. Install the Vault Server Updates
4. Open the ADMS console and migrate the database [Migrate a Database](#)
5. Restore the backup from Vault Workgroup [Back Up or Restore a Vault](#).

Pro Tip: Work with your qualified Value-Added Reseller/Partner

Migration

Workgroup to Professional

- **Vault Client:**

1. Uninstall Vault Workgroup Client Uninstalling and reinstalling the Vault Client.
2. Install Vault Professional Client

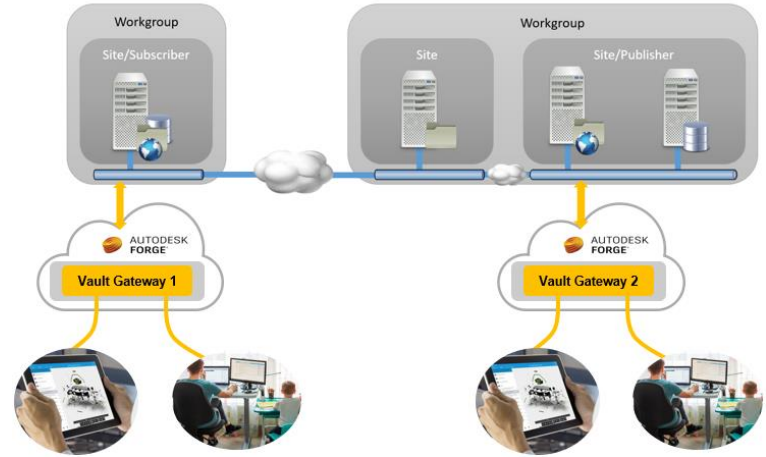
Vault Gateway

Vault Gateway

- With Vault Gateway, team members can remotely connect to the vault
- Vault Gateway technology securely connects remote devices to Vault servers through a cloud service. The Vault Gateway service generates a URL in place of the Vault server name when logging into the Vault client software (e.g., Vault Client, Add-ins, etc.). The cloud service interfaces with the vault server, exchanging data between the client and server in real-time
- Configuring and using Vault Gateway doesn't require any of the following network resources:
 - Connection to an on-premise network
 - Connection to a VPN
 - Opened inbound network ports

Vault Gateway

Connected Workgroups | Multiple-Gateways



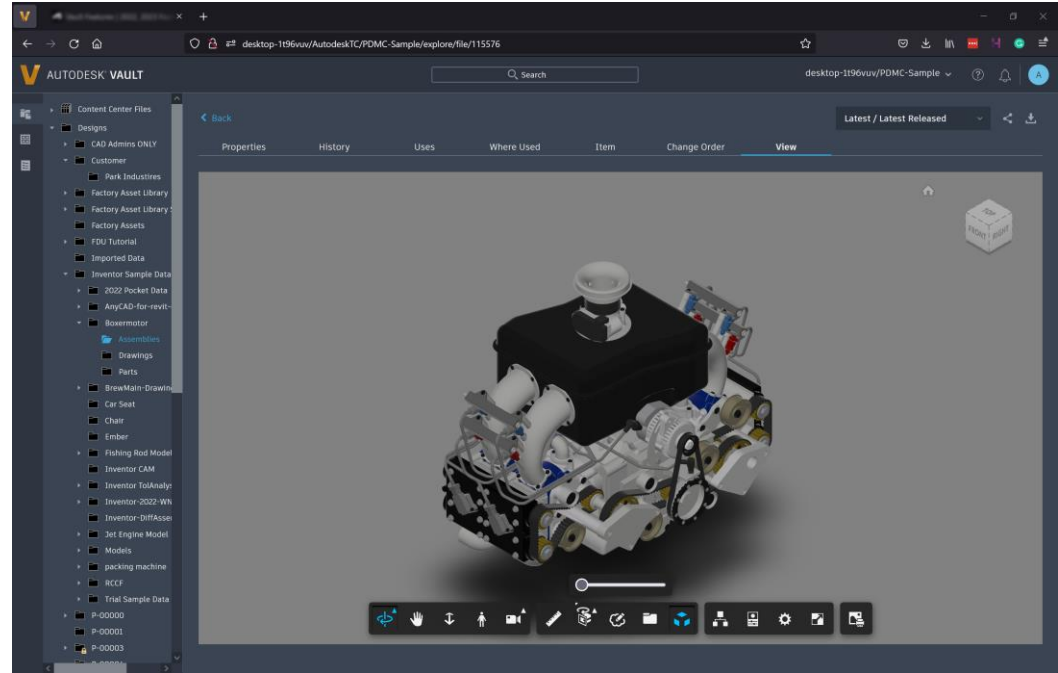
It's *Fast!!!*



Thin Client

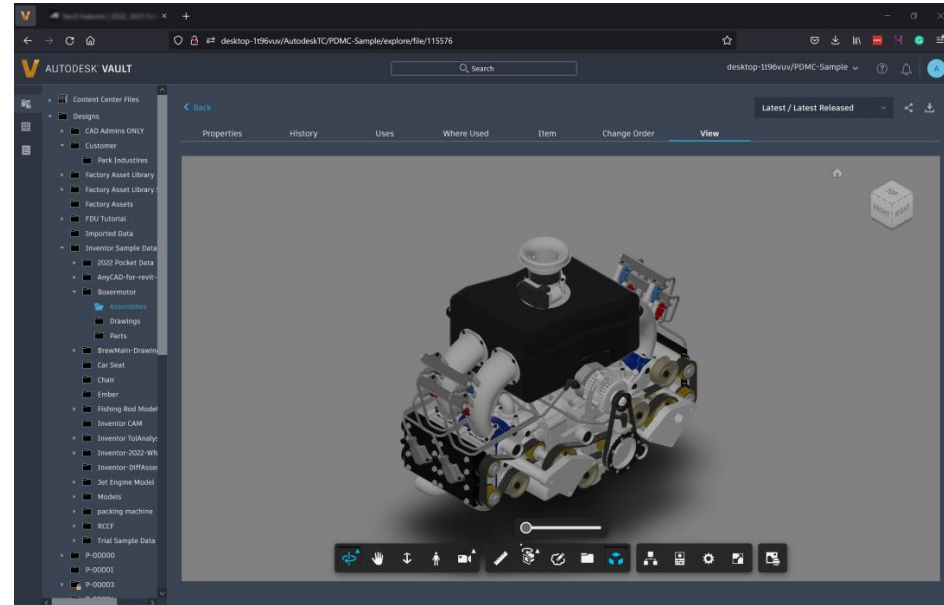
Thin Client

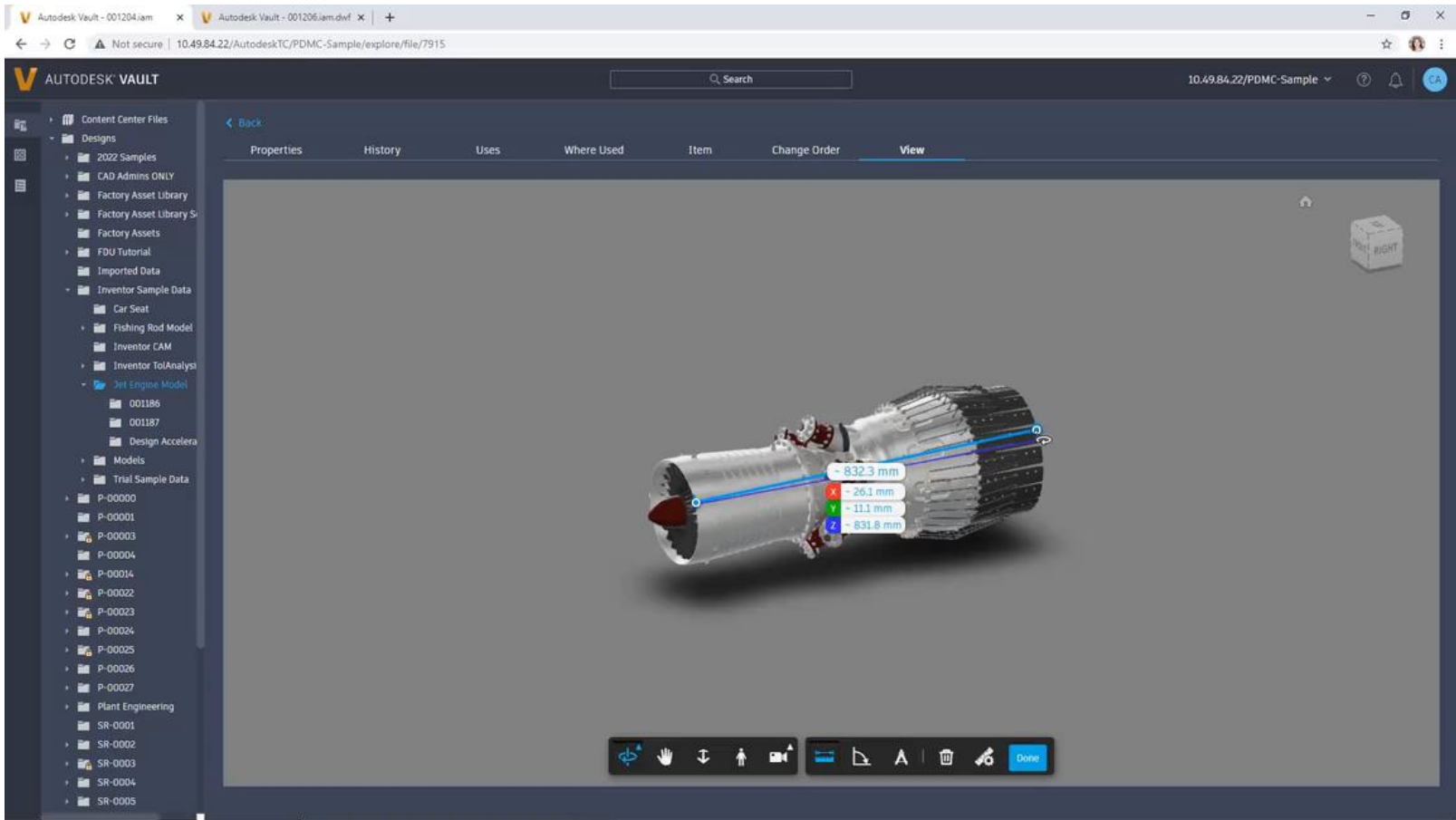
- Free!
- Runs in nearly any web browser
- Runs on nearly any device
- No need to install Design Review



Thin Client

- The Vault Thin Client provides read-only features for viewing and sharing Vault data in a web browser.
- You can work with your vaulted data using the following features:
 - View data associated with individual vault objects
 - Preview Autodesk Inventor files and other supported file types in the Viewer
 - View records and attachments in change orders
 - Switch between vaults in the Thin Client
 - Share links you can open in the Vault Client on desktop or in the Thin Client
 - Download copies of files directly to your computer





Vault Mobile

Vault Mobile

- The Autodesk Vault mobile app allows you to work with your design and engineering data quickly and securely
- The app is available for Apple iOS and Android devices. Download it from the [Apple App Store](#) or from the [Google Play Store](#).

Vault Mobile

Requirements

- The following Vault components are required to sign in to the Vault mobile app: A subscription to one of the subsequent editions of Vault:
 - Vault Professional
 - Vault Office
- A 2020, 2021, 2022, or 2023 Vault Professional server

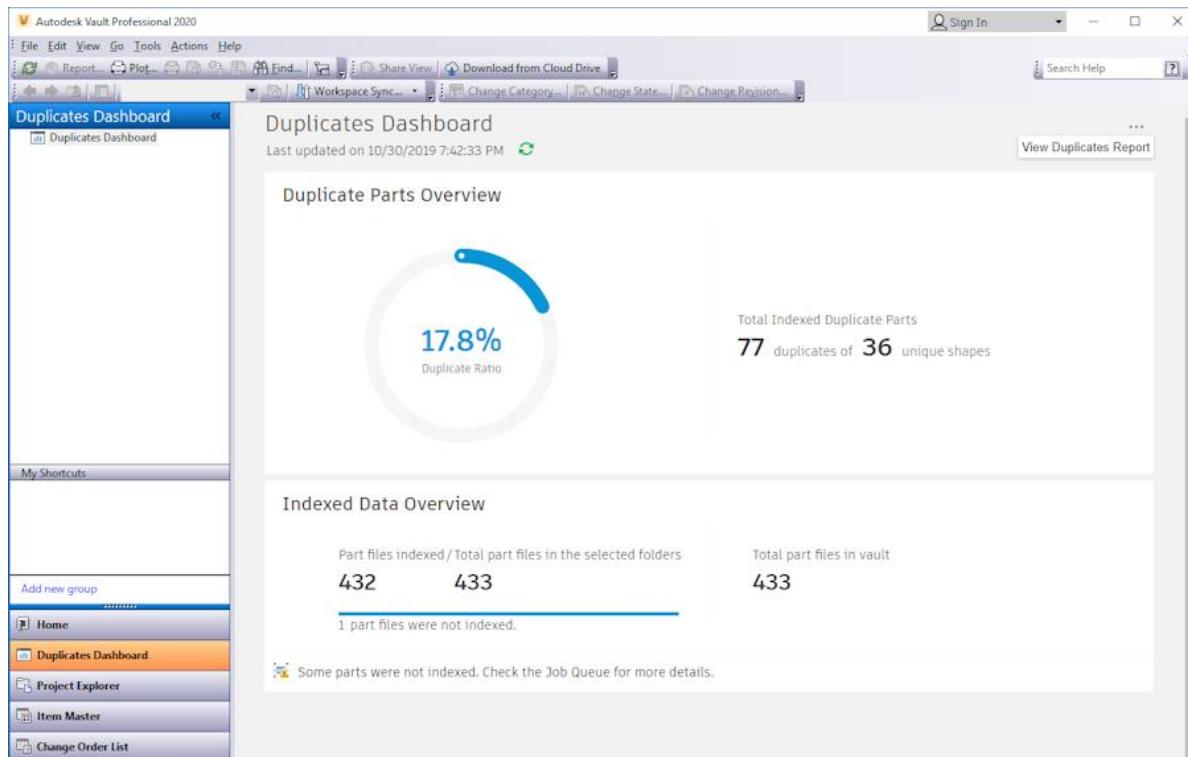
Features

- The Vault mobile app helps complete non-CAD tasks and manage your projects. You can use the app to:
 - View 2D and 3D designs
 - Check non-CAD files (for example, Microsoft Word and Excel files) in and out
 - Approve and sign documents
 - Create and participate in change orders (COs)
 - Find data using QR code, barcode, simple, and advanced searches
 - **Works with Vault Gateway**



Duplicate Search

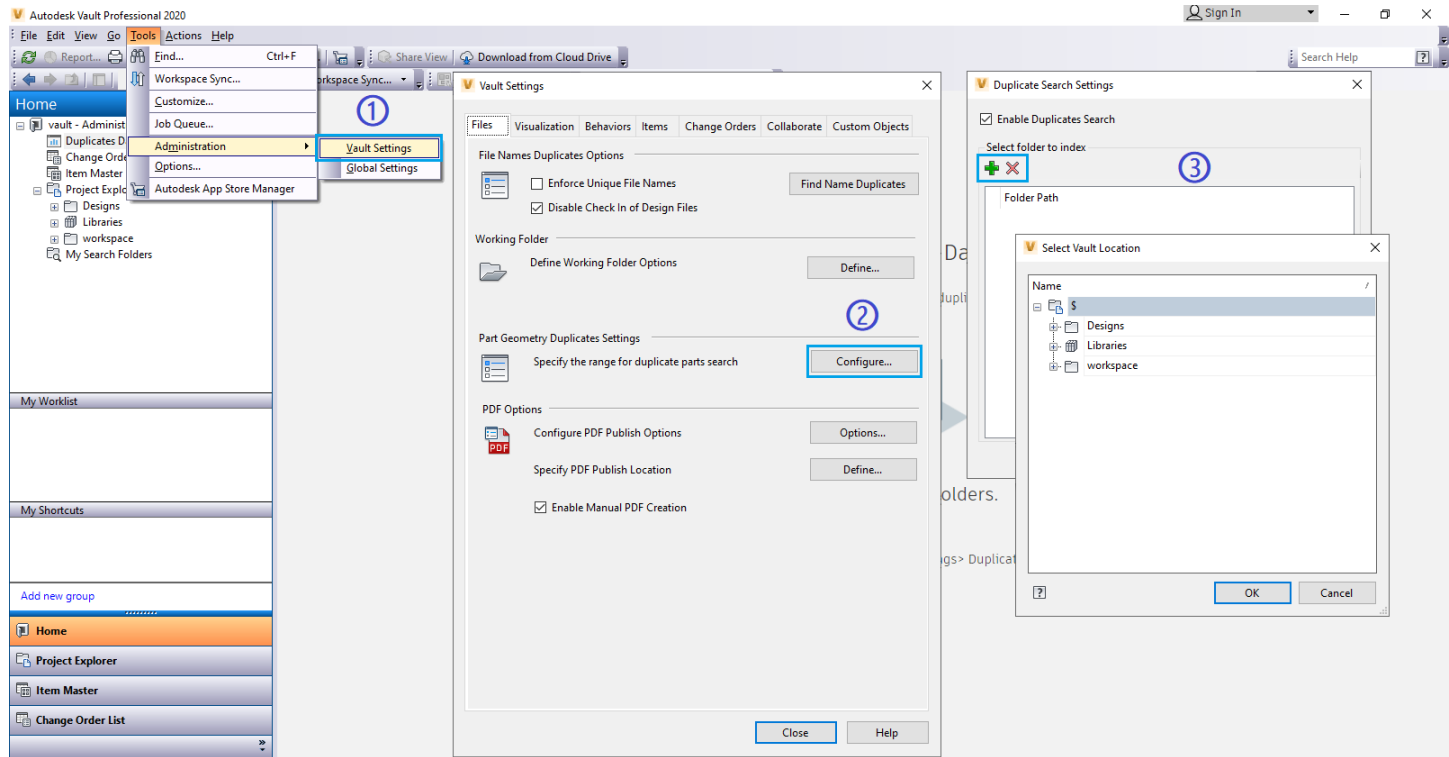
Duplicate Search



Duplicate Search

- Understand the duplicate ratio within the environment
- Clean up the existing design from duplicate parts during the review/release process and before check-in process for external parts
- Works with Inventor Model Data

Duplicate Search

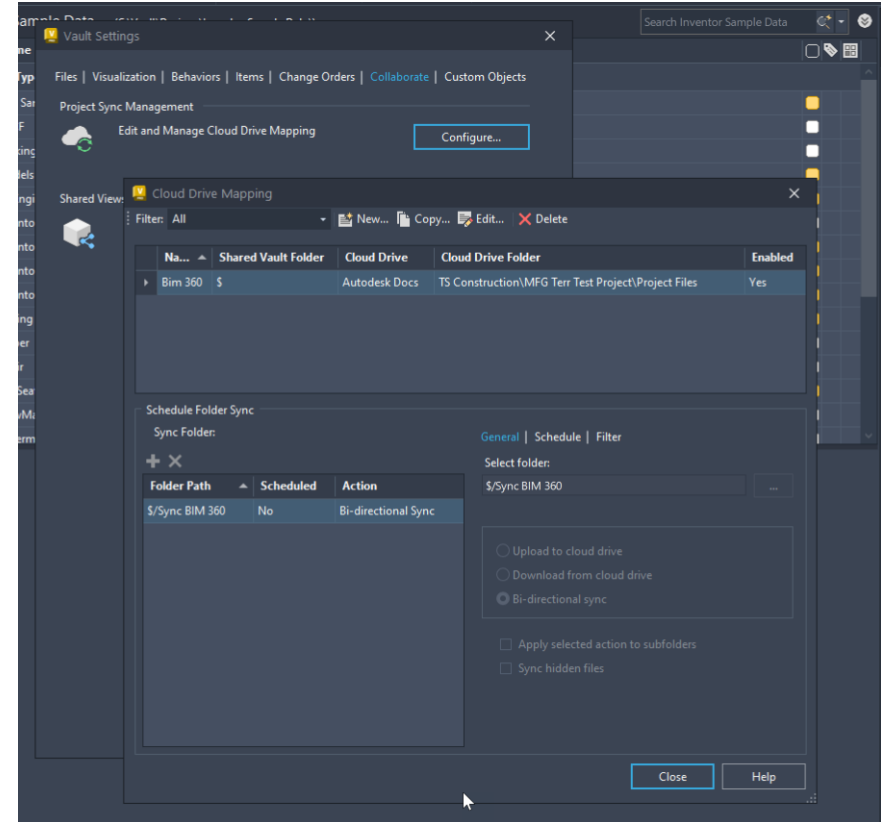




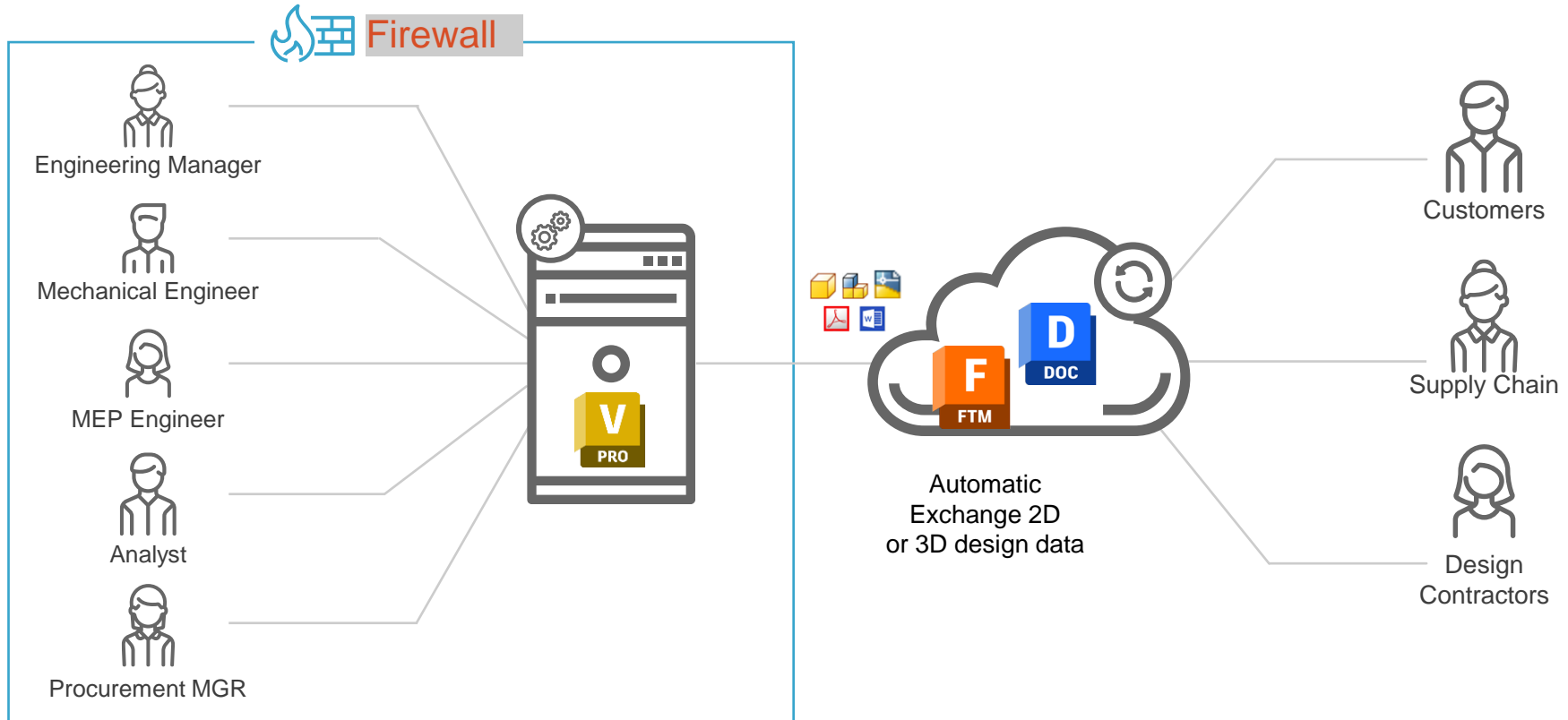
Project Sync

Project Sync

- The Project Sync feature provides file and folder synchronization between Vault and supported Autodesk cloud drives
 - Upload to cloud drive
 - Download from cloud drive



Project Sync





3rd Party CAD

Multi CAD

3rd Party CAD

Vault Add-Ins

Purpose

Autodesk Vault integrates with your design software using an add-in. The add-in brings the basic file management functionality of Autodesk Vault into the designer's environment

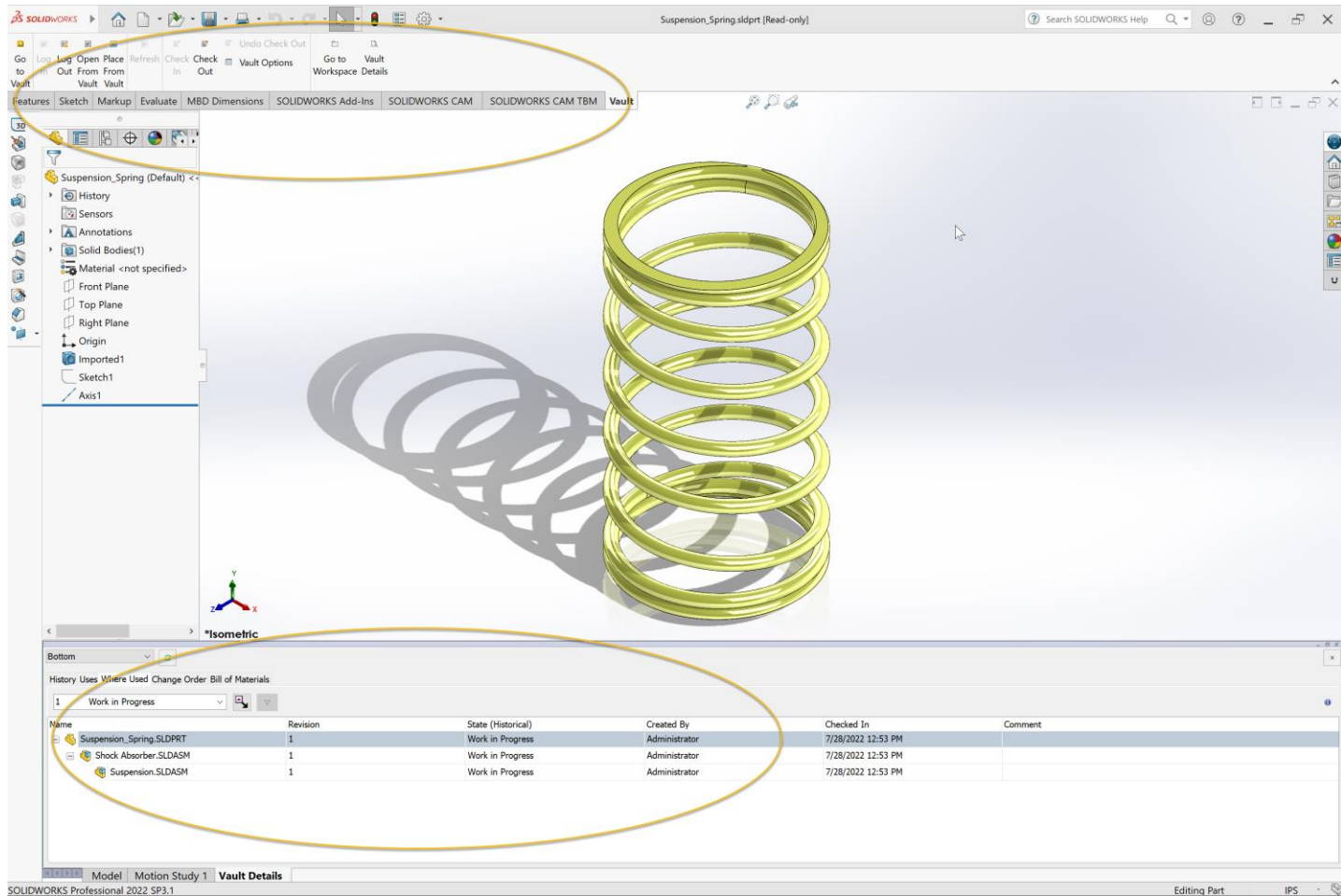
Comes With

- SolidWorks
- Creo
- MicroStation

Added Cost

Supports Item Bills of Materials

- PowerMILL
- FeatureCAM
- Catia



Vault for MAKE

Vault for MAKE

VAO – Vault Enterprise Add On

Extend the capability of Vault Professional with Vault Enterprise Add-On

An additional subscription is required

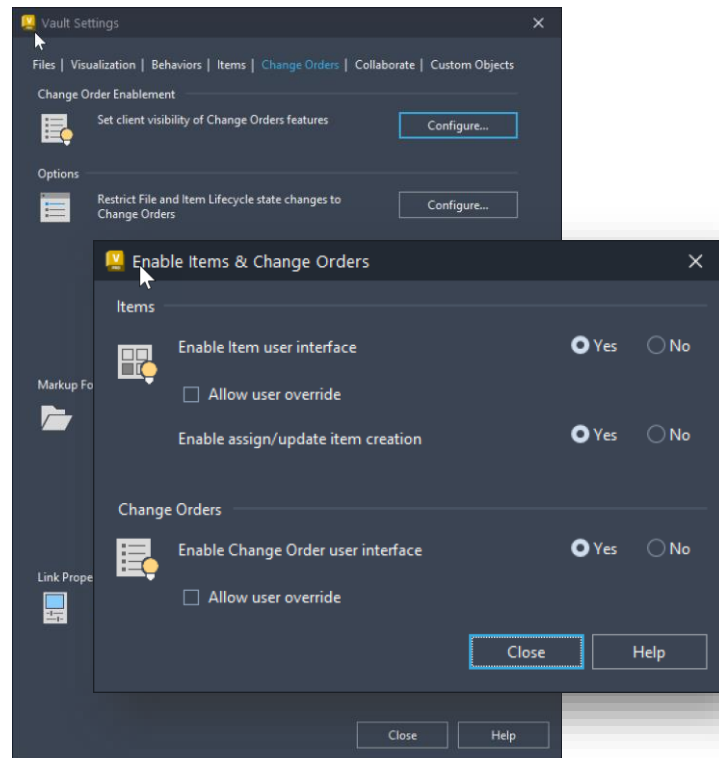
- Vault add-in for PowerMill
- Vault add-in for FeatureCAM
- Part of the Vault Enterprise Add-On collection of tools

ECN's and Items

Settings

ECN and Items

Enable Items and Change Orders



Engineering Change Notice/Order

Engineering Change Order

- Change orders are a component of the change management process that describes why, how, and when changes are made to a design
- Change order states help track the progression of the change order through the change management process. The state of the change order can determine which users can affect the change order, based on the user's role. Change orders use a routing list to control which users are notified when a Change Order enters a certain state
- You must be an Administrator or Change Order Editor to create or participate in a change order



Items

Items

- An Item is a container
- An Item holds an object/objects
 - CAD Drawing
 - CAD Models
 - Specifications
 - Material Information
 - Non-CAD objects such as grease
- An Item is the vehicle of conveyance of information to other systems
- A collection of Items is a Bill of Materials



Items

File Centric



Vault Workgroup is
File Centric



Lifecycle States
affect the File



No Bill of Materials
stored in Vault

Item Centric

- Item Centric workflows are Item focused
- Lifecycle States affect the Item
- Lifecycle States can affect the File
 - File and Item States are separate
- Change Orders can happen on Items or Files

Items

Bill of Materials

- Inventor
- AutoCAD Mechanical
- AutoCAD Electrical
- SolidWorks
- Creo
- AnyCAD supported consumables in Inventor

Autodesk Vault Professional

File Edit View Go Tools Actions Help

New Report Plot... Go to: Enter an item number Find... Share View Download from Cloud Drive

All Items Quick Sync... Change Category... Change State... Change Revision...

Home

- Vault - administrator
 - Change Order List
 - Item Master
 - Project Explorer (5)
 - Content Center Files
 - Designs
 - 2D to 3D
 - ASKA
 - ASKA iLogic Frame Generator
 - ASKA Start
 - Assemblies
 - Nests
 - parts
 - Special
 - autocad-2019-launch-demo-en
 - autocad-Vault-demo-en
 - Baker Pacific
 - CAD Interoperability
 - Dynamic Simulation
 - Electrical System
 - Factory Assets
 - Factory Design Utilities
 - Hedge Trimmer
 - High speed switch
 - iLogic Wheel
 - Individual Part Files
 - Machine Tool
 - Mixer
 - Shape Generator
 - Sheet-metal
 - SLM Solutions
 - Technical Documentation
 - Tube And Pipe
 - Factory Assets
 - Libraries

My Worklist

ECO-000020 (9/7/2018)

My Shortcuts

- iLogic Wheel
- High speed switch
- Machine Tool
- A4501.iam

Add new group

Item Master

Search Item Master

Number	Revision	State	Title (Item.CO)	Description (Item.CO)
Elevated Welding Robot	G	Work in Progress	FINAL ASSEMBLY	ELEVATED WELDING ROBOT
Lubricant	A	Released	ASKA Approved Lubricant	ASKA Approved Lubricant
00-000-000F	A	Released	WELDING STATION 000	WELDING STATION 000
20-200-357	D	Work in Progress	WELDED ASSEMBLY	FRAME MOUNTING FOOT
50-200-001F			FINAL ASSEMBLY	FRAME MOUNTING FOOT
50-200-351				
200-363				
200-373				
90666A114				
100002				
100003				
100004				
100005				
100006				
100007				
100008				
100009				
100010				

Elevated Welding Robot - Work in Progress - Item

File Edit View Actions Help

Save and Close Exit Edit Mode Mechanical Bill of Mat... Compare Elevated Welding Ro...

General History Bill of Materials Where Used Change Order View

Revision: Latest Work in Progress

Number: Elevated Welding Robot

Title: FINAL ASSEMBLY

Description: ELEVATED WELDING ROBOT

Units: Each

Associated files:

File Name	Version
ASKA Elevated Welding Robot Arran...	4
200-352.iam	12

Properties:

Name / Value

Equivalence Value

Category: Assembly

Lifecycle State: Work in Progress

Last Updated By: Administrator

Last Updated: 9/13/2018 11:16 AM

Shared Views

By: Date created

200-352.collaboration

Created on September 11, 2018

Expires in 30 days

1 comment

ASKA Elevated Welding Robot Arrange...

Created on September 11, 2018

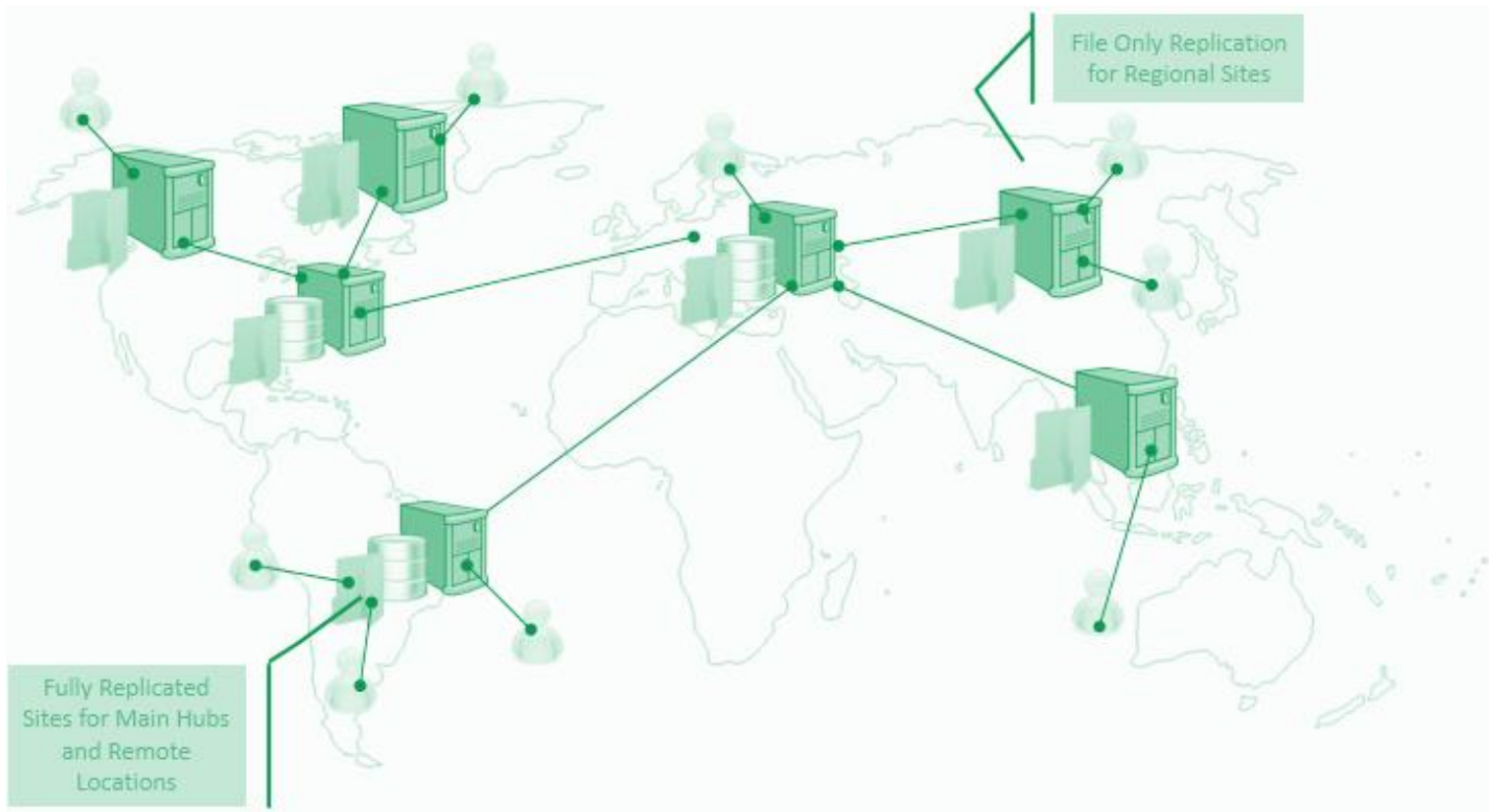
Expires in 30 days

virtualserver Vault administrator

121 of 122 Items (1 selected)

Replication

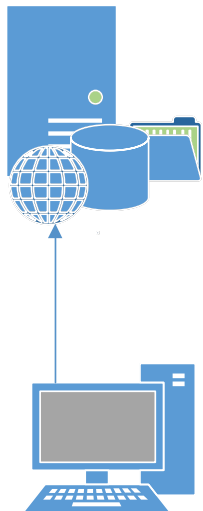
Enterprise Solution



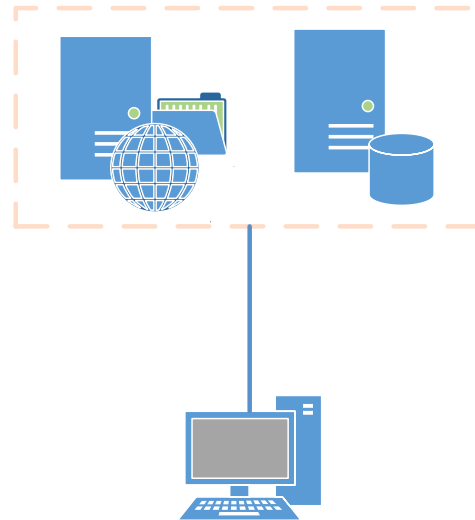
Single Site Deployment

- For Small Businesses
 - Typically, a single office
- Deployment Architecture
 - One SQL
 - One IIS/ADMS
 - One File Store (No AVFS)
- Can be deployed All-In-One or Distributed

All-In-One

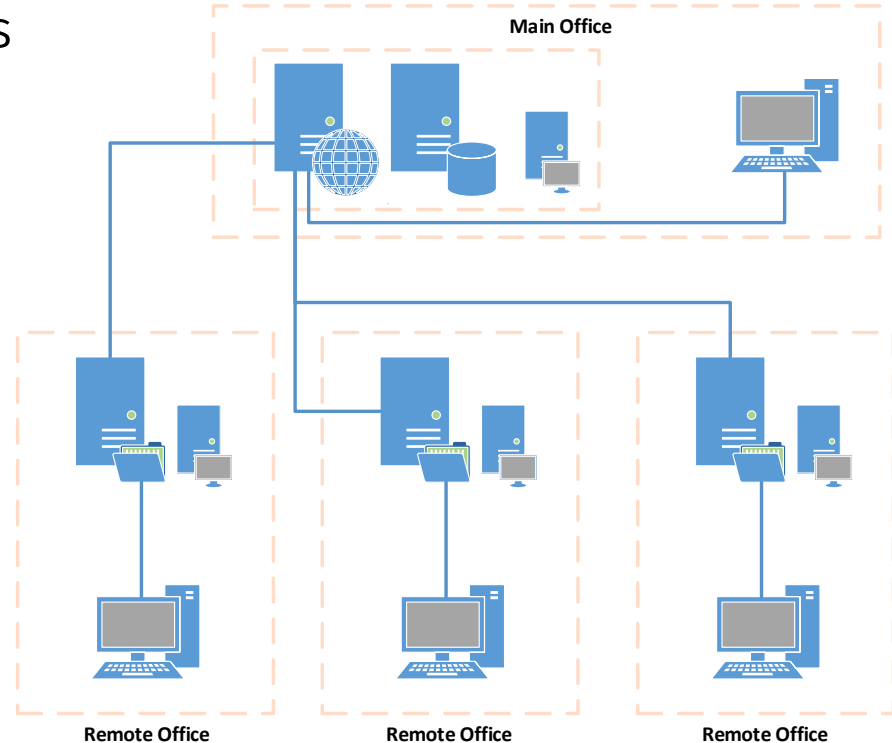


Distributed Server



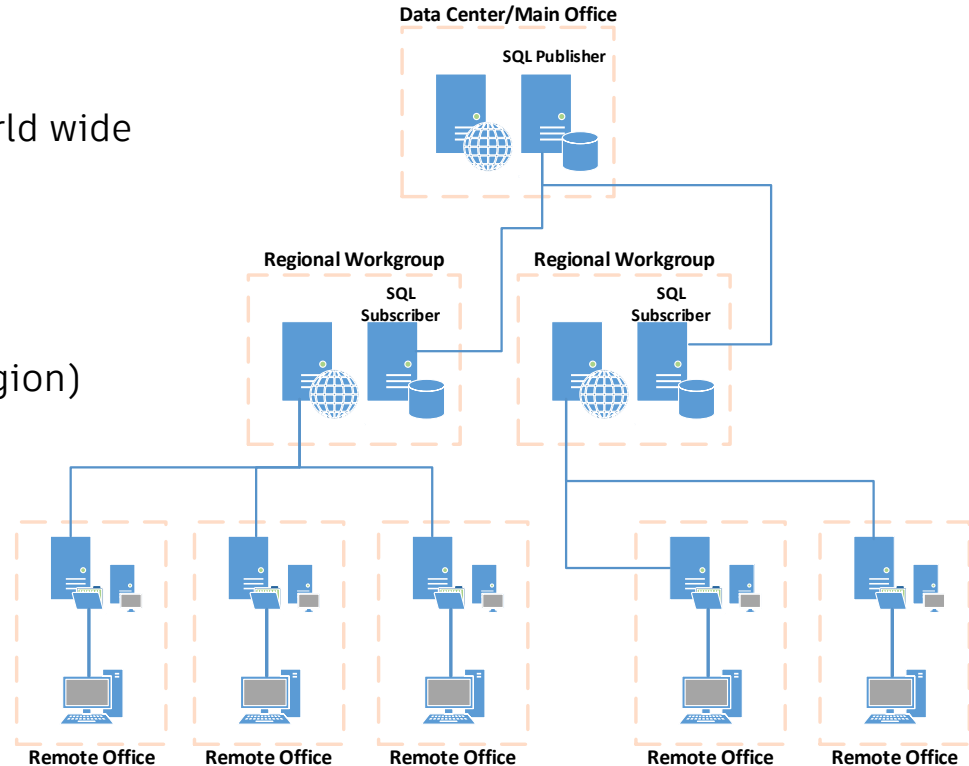
Multi-Site Deployment

- For Small/Medium Businesses
 - Typically, multiple offices
 - Typically, one geographic region
- Deployment Architecture
 - One SQL
 - One IIS/ADMS
 - Multiple AVFS/File stores



Connected Workgroup Deployment

- For Large/Enterprise
 - Typically, Multiple Geographic regions/world wide
- Deployment Architecture
 - Replicated SQL
 - One Publisher
 - Multiple Subscribers (typically 1+ per region)
 - One IIS/ADMS per SQL
 - Multiple AVFS/File stores
- Note:
 - Publisher & associated ADMS typically do not have users interacting directly with them



Hot Back Up

Hot Back Up

- In Autodesk Vault Professional the Hot Backup feature allows the backup to run while users are connected to the Vault

3rd Party Connected Data

3rd Party Integration



Built In

- No Additional Cost
 - Manual Import/Export
 - Typically, Item Centric




API

- Uses the Application Programming Interface
 - Automated Import/Export
 - Low-Cost Services
 - Typically, Item Centric



Middleware

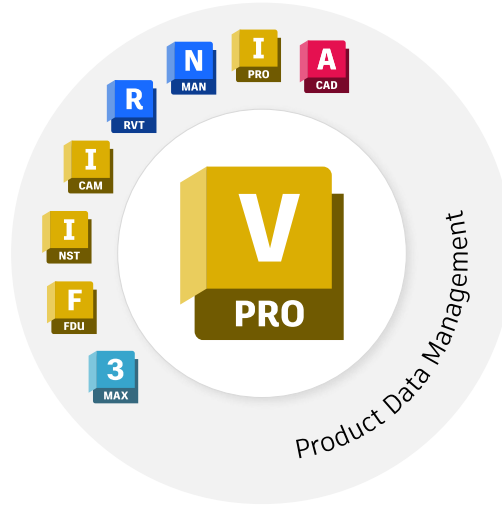
- Integration provided by middleware
 - Automated, process driven
 - Additional costs in Licenses and Services



Vault PLM

Solution Introduction

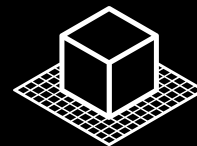
Save time while improving quality with PDM



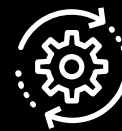
Improve lifecycle efficiency with Vault PLM



PRODUCT PORTFOLIO
MANAGEMENT



PRODUCT
DEVELOPMENT



CHANGE
MANAGEMENT



NEW PRODUCT
INTRODUCTION

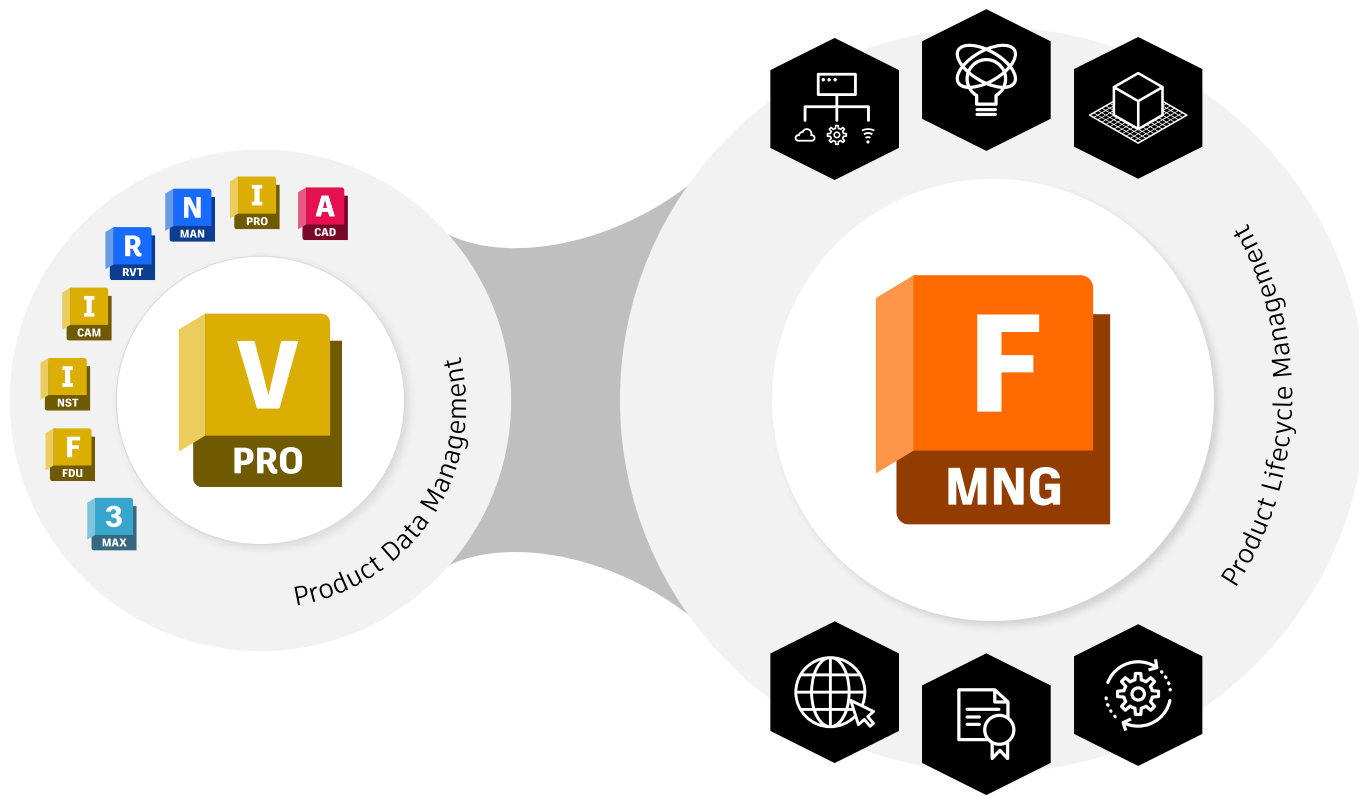


SUPPLY CHAIN
COLLABORATION

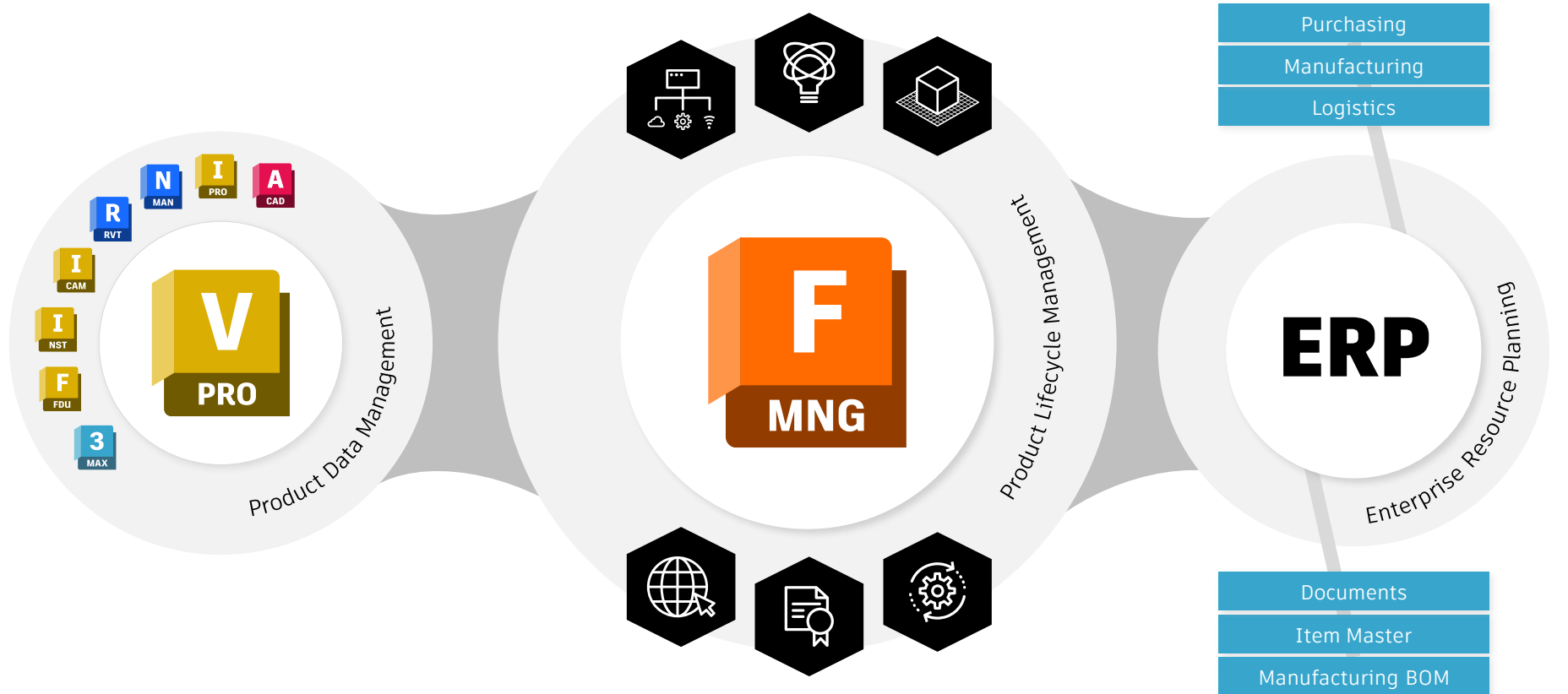


QUALITY
MANAGEMENT

Improve lifecycle efficiency with Vault PLM



Cloud connected business processes



Questions...

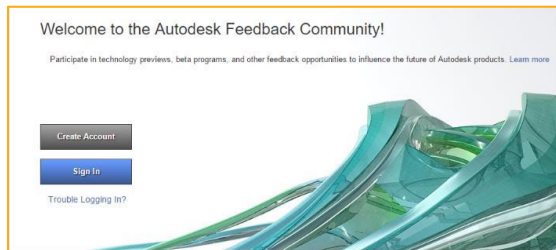
allen.gager@autodesk.com

Closing

Make Your Voice Heard

Vault Feedback Community

<https://autode.sk/VaultFeedback>



Vault Ideas Page

<https://autode.sk/vaultidea>

Vault Ideas

Share ideas for future product features directly with the Vault team and collaborate on existing suggestions with your peers.

[SUBMIT IDEA](#)

Thank You!



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