Autodesk® Vault Features You Aren't Using, But Need to Be

Adam Luttenbacher
Sr. User Experience Designer

Mikel Martin
Principle User Experience Designer

Your Instructors



Adam Luttenbacher

- 11 years at Autodesk
- Quality assurance, product designer, and user experience designer
- Experience on data management applications has given me the opportunity to know what is available and what is not being used



Mikel Martin

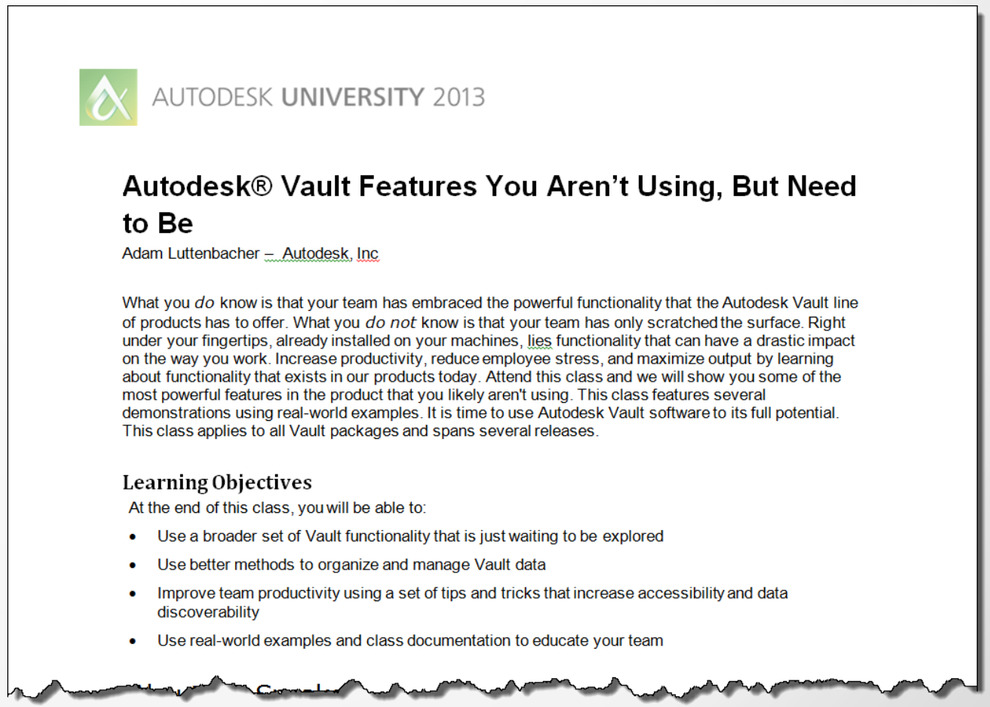
- 7 years at Autodesk
- Worked in the CAD/PLM industry in various roles for over 19 years.
- Principle User Experience Designer at Autodesk
- Vault and PLM360

Introduction

- There is a good chance that you are not utilizing the entire set of Vault functionality that is available.
- As a user experience (UX) designer, it is my intention to bring these features to your attention.
- You will find that your data is a lot easier to get to and that it takes a LOT less time to do what you're already doing today.

Handout

- Covers everything discussed in this presentation
- Contains step-by-step instructions
- More material



AUTODESK UNIVERSITY 2013

Autodesk® Vault Features You Aren't Using, But Need to Be

Adam Luttenbacher – Autodesk, Inc

What you *do* know is that your team has embraced the powerful functionality that the Autodesk Vault line of products has to offer. What you *do not* know is that your team has only scratched the surface. Right under your fingertips, already installed on your machines, lies functionality that can have a drastic impact on the way you work. Increase productivity, reduce employee stress, and maximize output by learning about functionality that exists in our products today. Attend this class and we will show you some of the most powerful features in the product that you likely aren't using. This class features several demonstrations using real-world examples. It is time to use Autodesk Vault software to its full potential. This class applies to all Vault packages and spans several releases.

Learning Objectives

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

- Use a broader set of Vault functionality that is just waiting to be explored
- Use better methods to organize and manage Vault data
- Improve team productivity using a set of tips and tricks that increase accessibility and data discoverability
- Use real-world examples and class documentation to educate your team

Outline

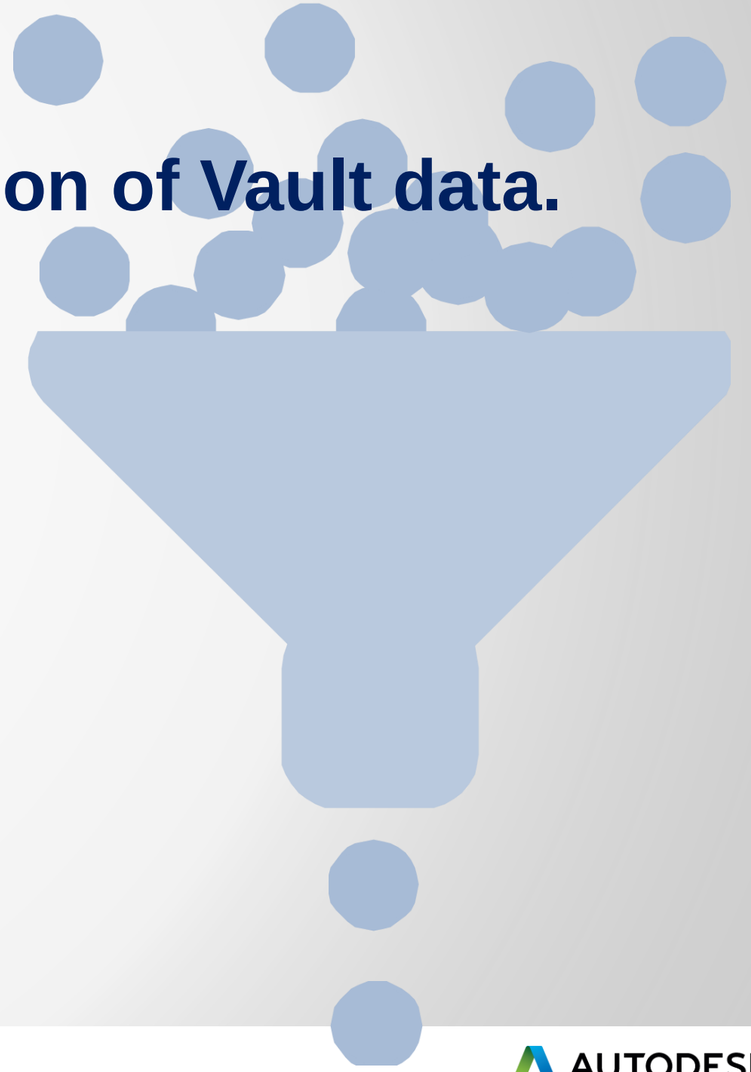
- Organize and Manage Your Data
- Vault Features You May Not Know About
- Vault Tips and Tricks
- Resources

Organize and Manage Your Data
Filtering Data

Organize and Manage Vault Data - **Filtering Data**

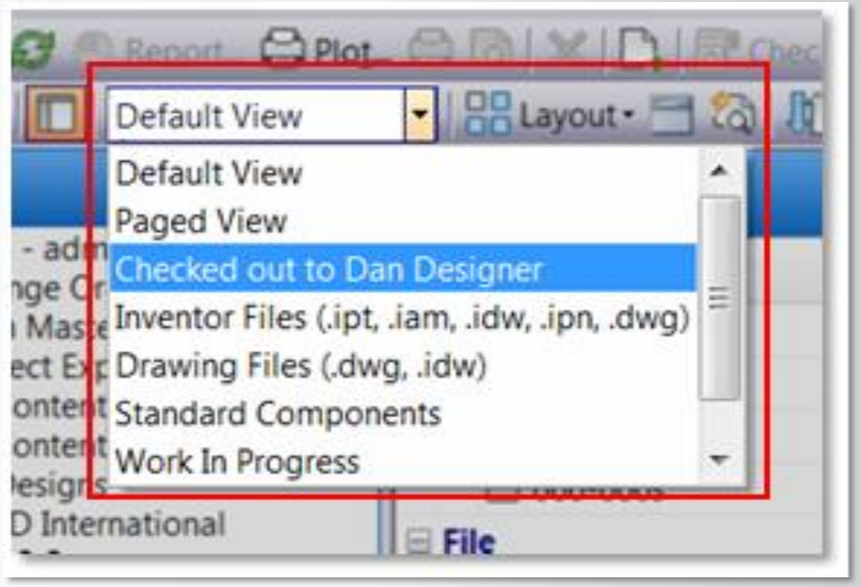
- What does it mean to filter your data?

  Separate, condense, or refine a large collection of Vault data.



Organize and Manage Vault Data - Filtering Data

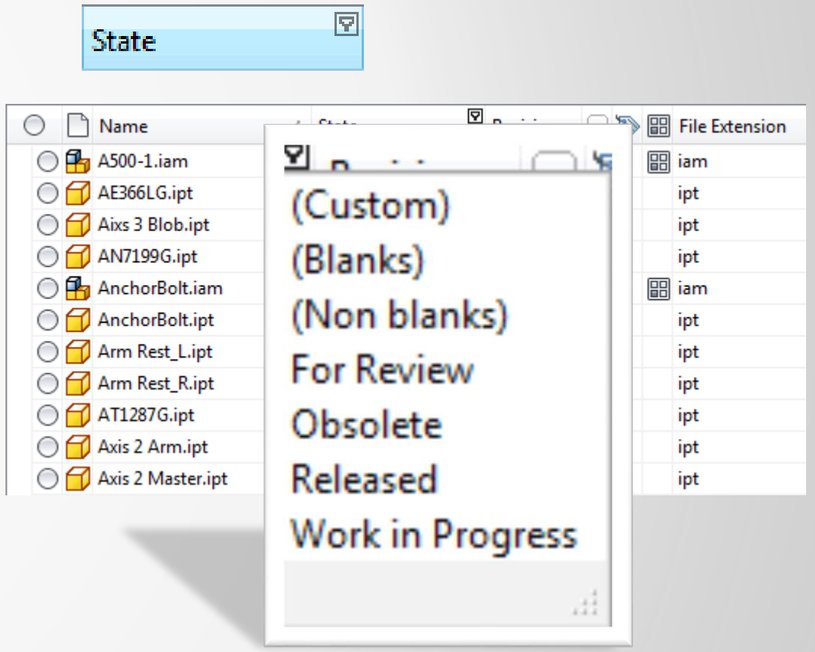
- Custom Views
  - Customize your view of the Vault Data
  - Available in each entity class
- Why is this useful?
  - Field selection
  - Filter using property values
  - Views saved on each folder
  - Quick and easy viewing of data



Demo

Organize and Manage Vault Data - Filtering Data

- Field Filter
  - Filter a list by property values
  - Build compound filters based on multiple property values

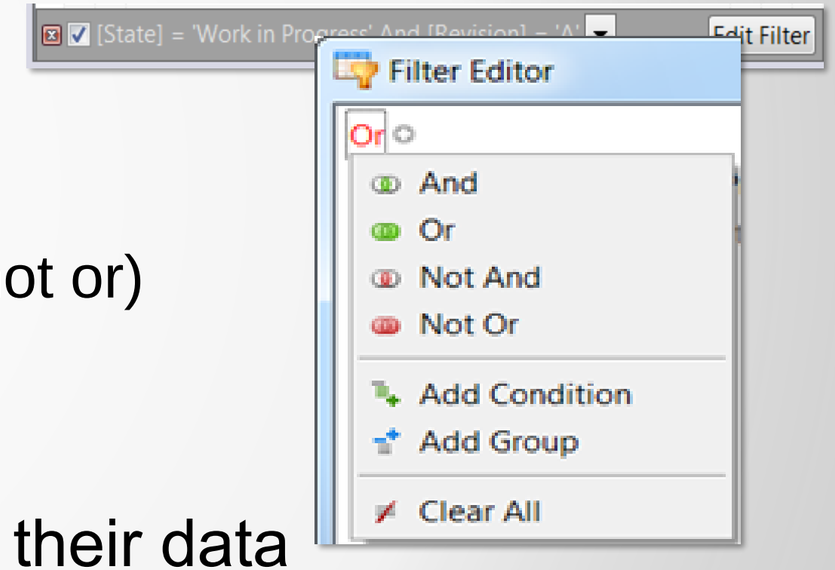


- Why is this useful?
  - Quick way to find what you're looking for
  - Examples: Material, File type, Checked Out By

Demo

Organize and Manage Vault Data - Filtering Data

- Field Filter (Customized)
  - More functionality available in filter toolbar
    - Customize filter
    - More conditions available
    - Complex filters
    - Change master condition (and, or, not and, not or)

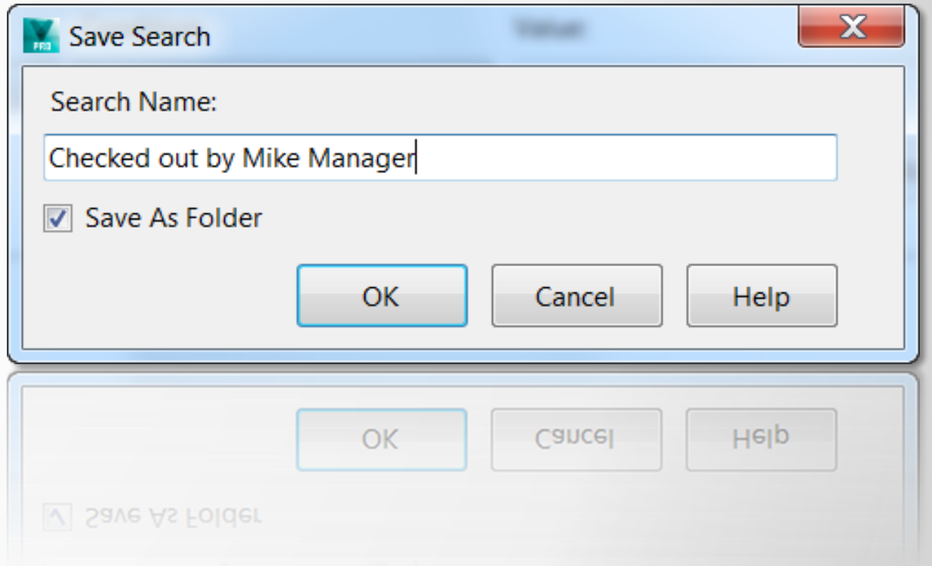


- Why is this useful?
  - This is the power user's version of getting to their data
  - Available in most main grids (add-ins too!)

Demo

Organize and Manage Vault Data - Filtering Data

- Saved Search
  - Better use of existing functionality
  - Quick access to searched data
  - Examples:
    - Checked Out by <name>
    - Last modified by <name>
    - Change order states

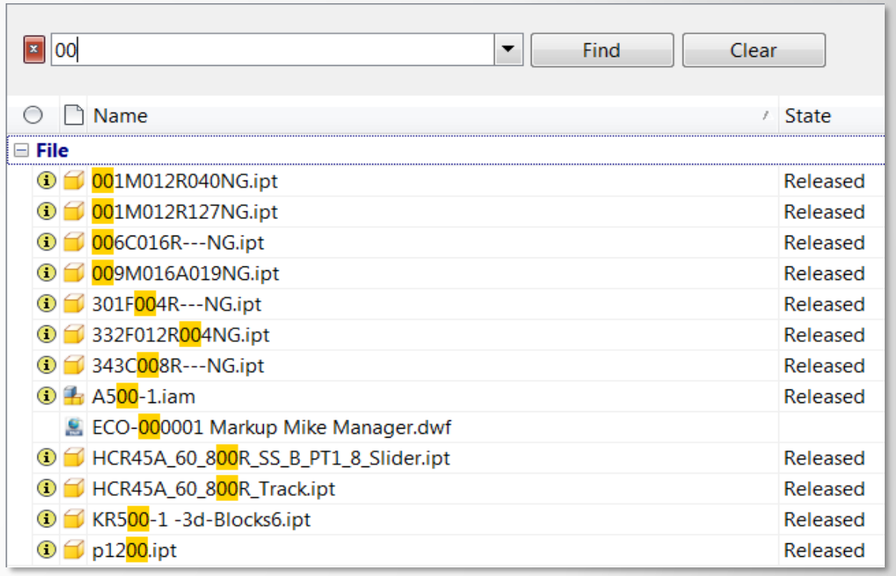


- Why is this useful?
  - Live and updated “reports” on ALL Vault data
  - Use this with Custom Views and Field Filters to maximize your efficiency

Demo

Organize and Manage Vault Data - Filtering Data

- Grid Quick Find
  - Available in all main grids
  - More interactive than basic search
  - No wildcards or segments needed
  - Searching client-side
- Why is this useful?
  - Filters data live (as you type)
  - Interactively highlights searched text
  - Available in the add-in dialogs



Demo

Organize and Manage Your Data Access

Organize and Manage Vault Data - **Access**

- What does it mean to have access to your data?

  Regardless of where your data resides, you can get to your data quickly and easily.

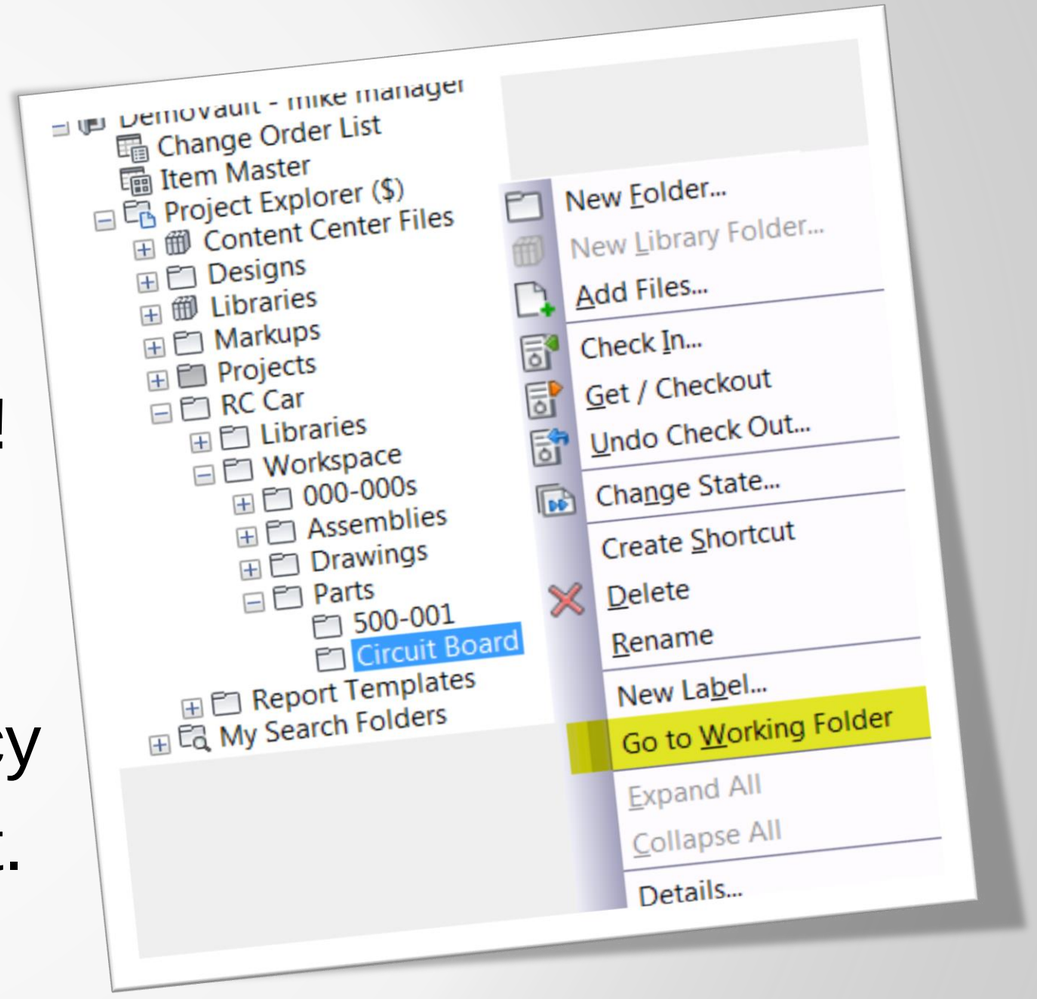
Organize and Manage Vault Data - **Access**

- Copy/Duplicate Folder Structure
  - Replicate your project folder structure
  - No ‘new folder’ command
- Why is this useful?
  - There are many companies that replicate their project folder structure for each new project. This accomplishes that task in about 3 clicks.
  - Reduces folder structure inconsistency

Demo

Organize and Manage Vault Data - Access

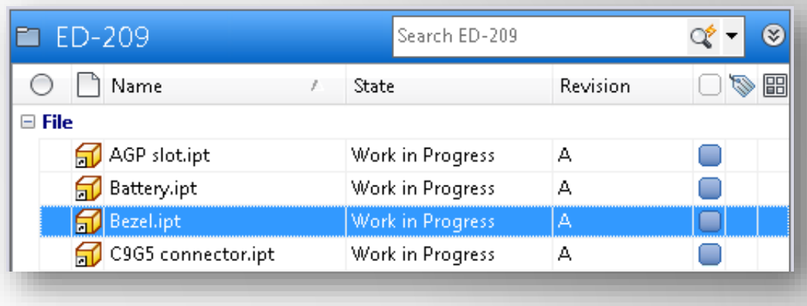
- Go To Working Folder
  - Duplicate deep Vault structure
  - Create multiple folder levels in 1 click!
- Why is this useful?
  - Reduces folder structure inconsistency
  - Project folder structure stored in Vault.

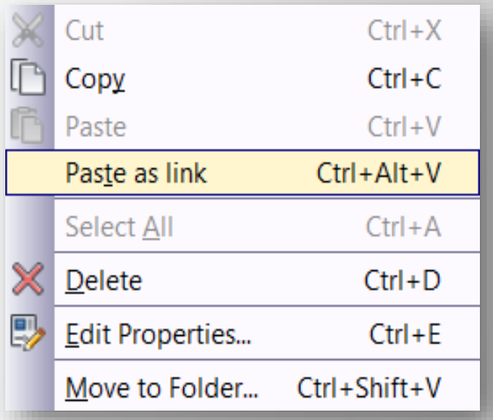


Demo

Organize and Manage Vault Data - Access

- Vault Links
  - Exact representation of an object
  - A Vault ‘shortcut’ to extend beyond individual machine
  - Multiple links to one source





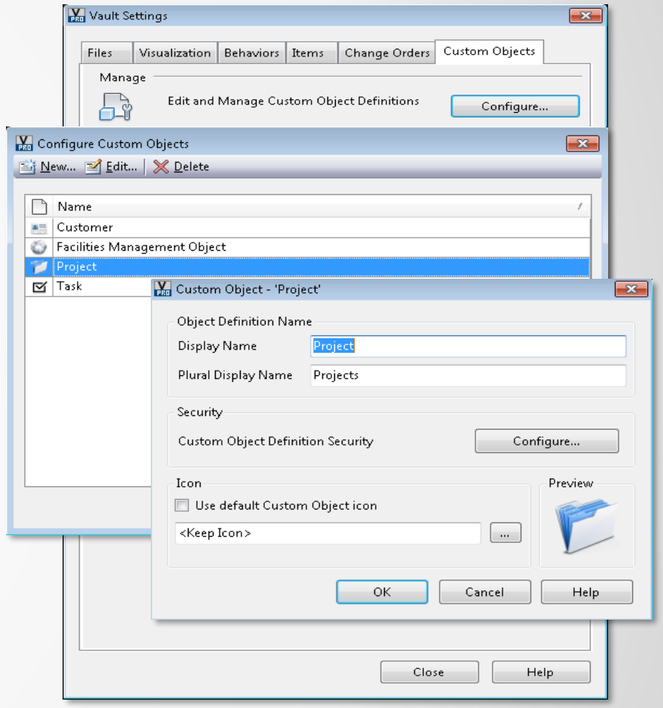
- Why is this useful?
  - Collect, Share, and Organize
  - Operate on links

Demo

Vault Features You May Not Know About
Vault Explorer Features

Vault Features You May Not Know About – Vault Explorer Features

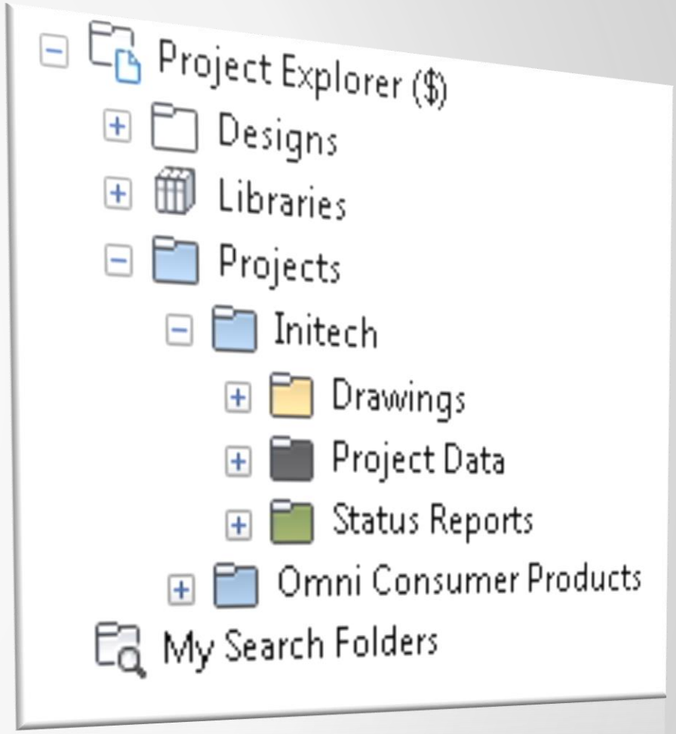
- Custom Objects
  - Create any “type” of object in Vault
  - Deep integration to Vault functionality
    - Main user interface
    - Properties
    - Lifecycles
    - And more!
- Why is this useful?
  - Maintain external data inside of Vault…without customization



Demo

Vault Features You May Not Know About – Vault Explorer Features

- Lifecycles on Folder
  - Drive lifecycle state and security of folders
  - Control folder content security
  - Control the state transition of a project
- Why is this useful?
  - Drive and communicate process
  - Control access through process



Demo

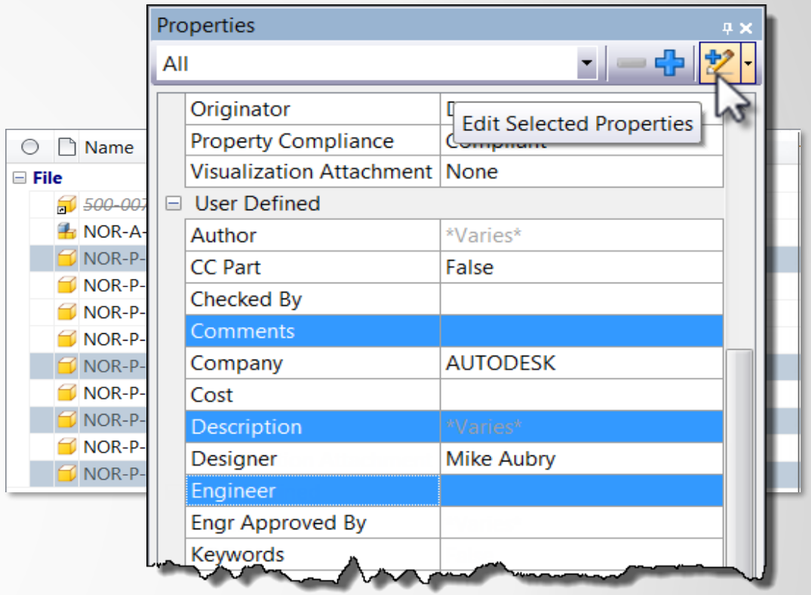
Vault Features You May Not Know About – Vault Explorer Features

- Workspace Sync
  - Automate the refresh and clean-up of local workspace
  - Report (daily) on the status of your workspace
  - Automate through command prompt (or Windows Task Scheduler)

- Why is this useful?
  - Out-of-date workspaces lead to errors

Vault Features You May Not Know About – Vault Explorer Features

- Edit Properties
  - Quick access to property editing
  - Edit item properties in one command
  - Edit multiple entity types at once

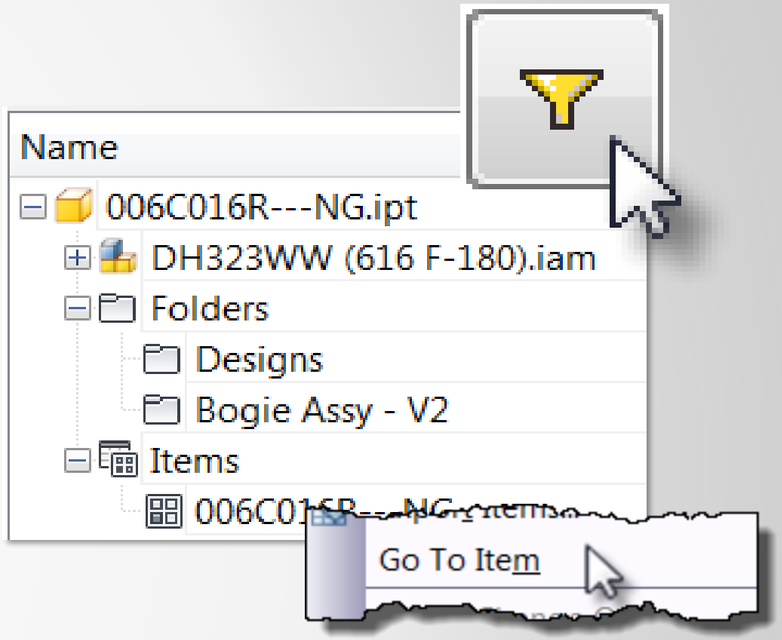


- Why is this useful?
  - Property editing is critical but cumbersome
  - Quicker editing of selected properties on selected objects

Demo

Vault Features You May Not Know About – Vault Explorer Features

- Where Used Content Filter
  - Identify folder location of a file
  - Identify folder location of file links
  - View items assigned to file
  - View change orders on a file



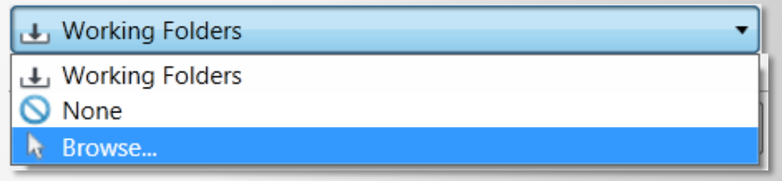
- Why is this useful?
  - Quick navigation from the file
  - Find all things related to the file in one place

Demo

Vault Features You May Not Know About – Vault Explorer Features

- Pack and Go Saved Search
  - Pack or send saved data based on saved searches
  - Pack and Go data from multiple locations

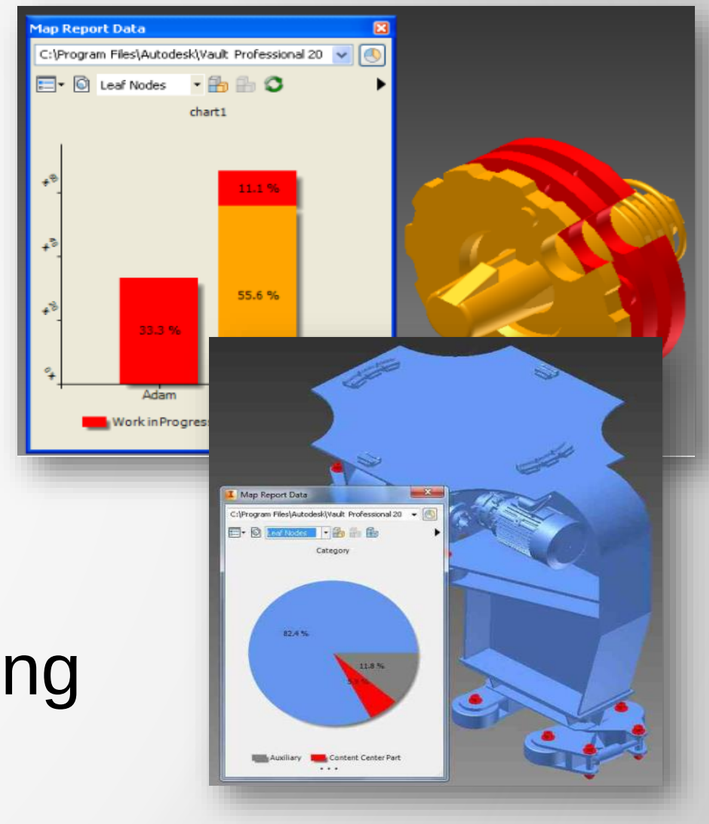
- Another Pack and Go (Get/Checkout Work-around)
  - File and folder relationships drive data collection
  - Pack an entire folder structure



Vault Features You May Not Know About
Add-Ins

Vault Features You May Not Know About – Add-Ins

- Data Mapping
  - Overlay colors onto the assembly model
  - Visually represent Vault properties



- Why is this useful?
  - Visually identify what components are interesting

Demo

Vault Features You May Not Know About – **Add-Ins**

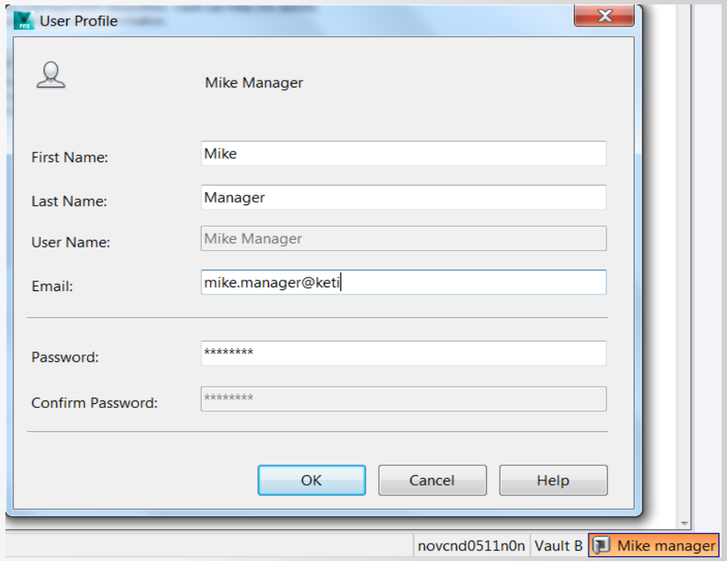
- Navigating through Vault links
  - Use Vault links as a portal to information outside of you workspace
  - View the files and items associated to change orders you are responsible for
- Why is this useful
  - Access to all of your project data in one place!

Demo

Vault Tips and Tricks

Vault Tips and Tricks – Profile Editor

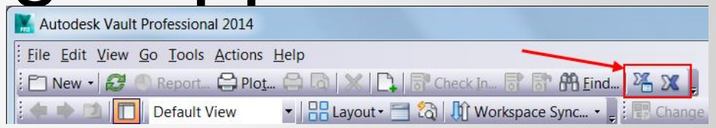
- Edit profile and password
  - Quick and easy way to modify user settings
  - Accessible to all users



- Why is this useful?
  - Users have the control
  - No need to bother the administrator

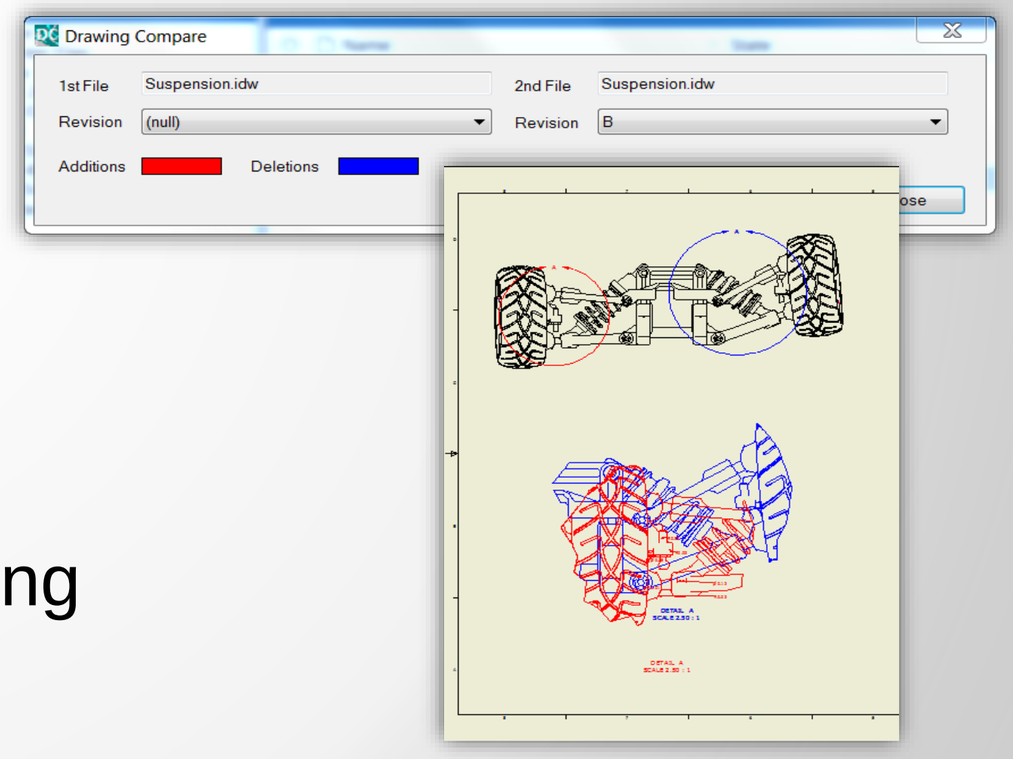
Vault Tips and Tricks – Autodesk Exchange Apps

- The “App Store” is a resource available to Autodesk users that is created by the community for the community.
- Autodesk Exchange Apps for Autodesk Vault helps you achieve greater speed, accuracy, and automation from concept to manufacturing.
- Simply click on the Autodesk Exchange Apps Website button in your Vault toolbar.



Vault Tips and Tricks – Drawing Compare

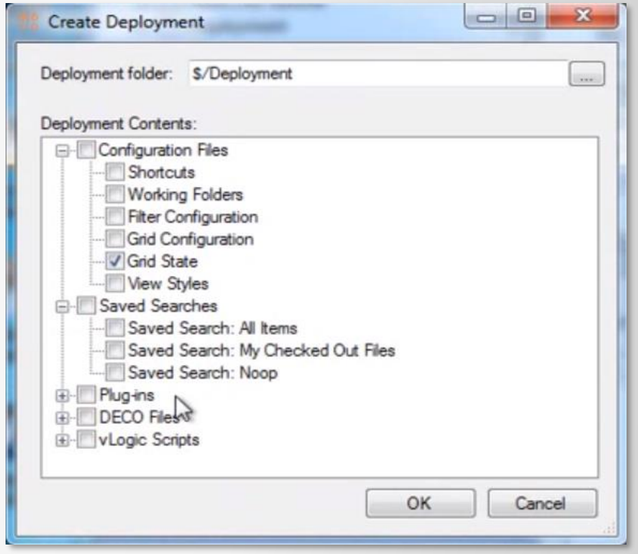
- View changes
  - Two drawings or two versions of the same drawing
  - Highlight changes



- Why is this useful?
  - Simple way to identify the changes
  - Free utility built by Autodesk Consulting

Vault Tips and Tricks – Project Thunderdome

- Deploy Useful Vault settings out to all Vault users
  - Saved searches
  - Grid settings
  - Shortcuts
  - Custom Views



- Why is this useful?
  - Configurations are stored locally. This gives the administrator a way to deploy settings to all (or some)

Autodesk Vault Resources

Resources – Under the Hood

- Autodesk Vault and Autodesk PLM 360
- Allan O’Leary, Brian Schanen, and Michelle Stone
- Great source of tips and tricks for Vault and PLM 360
- http://underthehood-autodesk.typepad.com/blog/



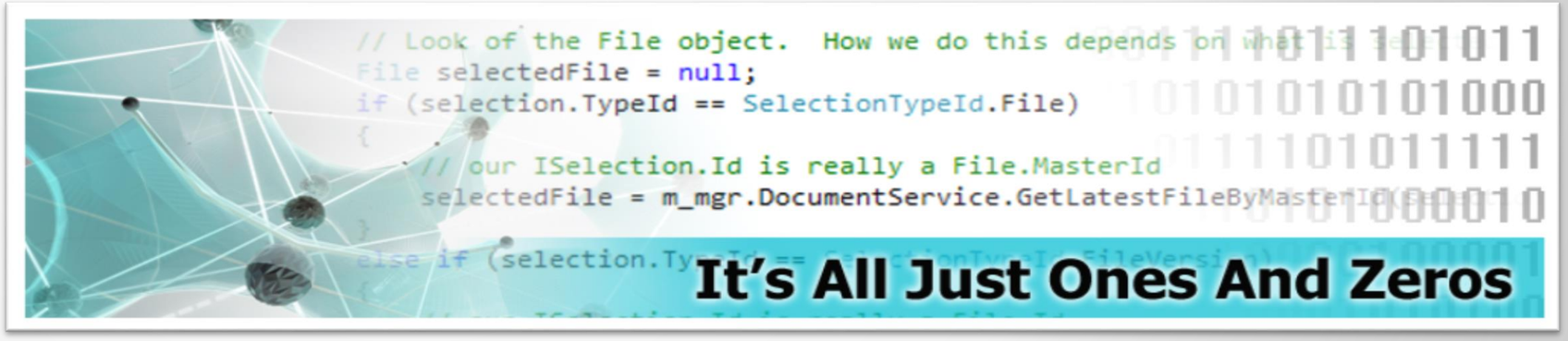
Resources – Cracking The Vault

- Autodesk Vault
- Run by Autodesk Support employees
- Great source for problem solving
- http://crackingthevault.typepad.com/



Resources – It’s All Just Ones and Zeros

- Blog for Vault and PLM 360 API developers
- Doug Redmond – Autodesk developer
- http://justonesandzeros.typepad.com/
- http://www.youtube.com/user/ItsAllJust1sAnd0s



Resources – Discussion Forums

- Autodesk customers and industry partners ask questions and share information about Autodesk products.
- Regularly monitored by Autodesk employees
- Vault discussion forum
  - http://forums.autodesk.com/t5/Vault-General/bd-p/101
- Vault Customization forum
  - http://forums.autodesk.com/t5/Vault-Customization/bd-p/301



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