

PL10600

Beyond Engineering to Sales, Purchasing, and Management with Vault Office

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Learning Objectives

- Discover the role of Vault office in your connected workflows
- Discover the consumer roles and capabilities provided in Vault Office
- Discover the detail of how to install, configure, and license Vault Office

Description

Learn how to capitalize on the important design and product detail generated in engineering with downstream consumers using Vault Office software. This class will look at how system administrators can provide a connected environment to non-CAD and non-technical-process contributors for change management, and approvals through to viewing and printing of documents while enforcing and maintaining data access integrity with Vault Office software. This class is designed to help you understand the features and functions of Vault Office software and how it fits in your organization.

Your AU Experts

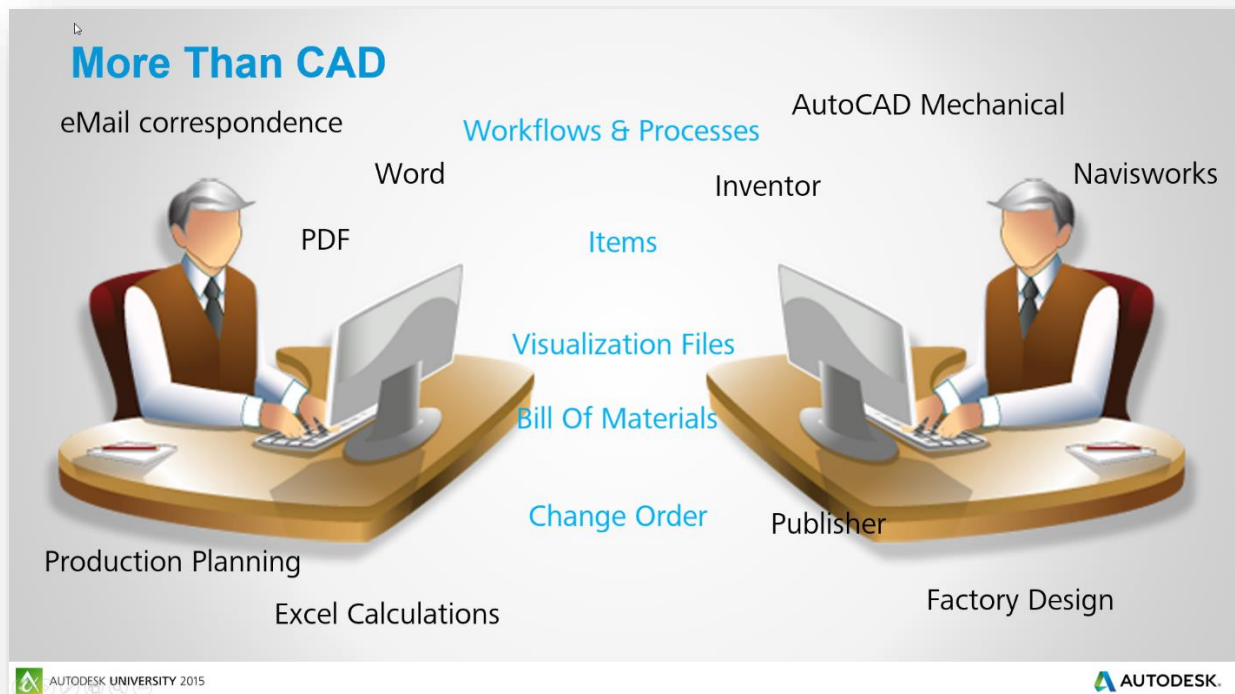
*After completing his diploma degree in Woodwork & Interior Design, **Eike Hengst** began teaching AutoCAD software at the University of Applied Science in Rosenheim. In parallel he worked with an Autodesk reseller as a CAD and PDM consultant. After that he took the chance to work as a CAD administrator rolling out Inventor. Since 8 years Eike is now working with Autodesk in different roles. Currently he is working as a product manager for Autodesk Vault.*



Introduction

More than CAD

Traditionally managing data is done by engineers and is mainly focused on CAD data and the related item and BOM information.



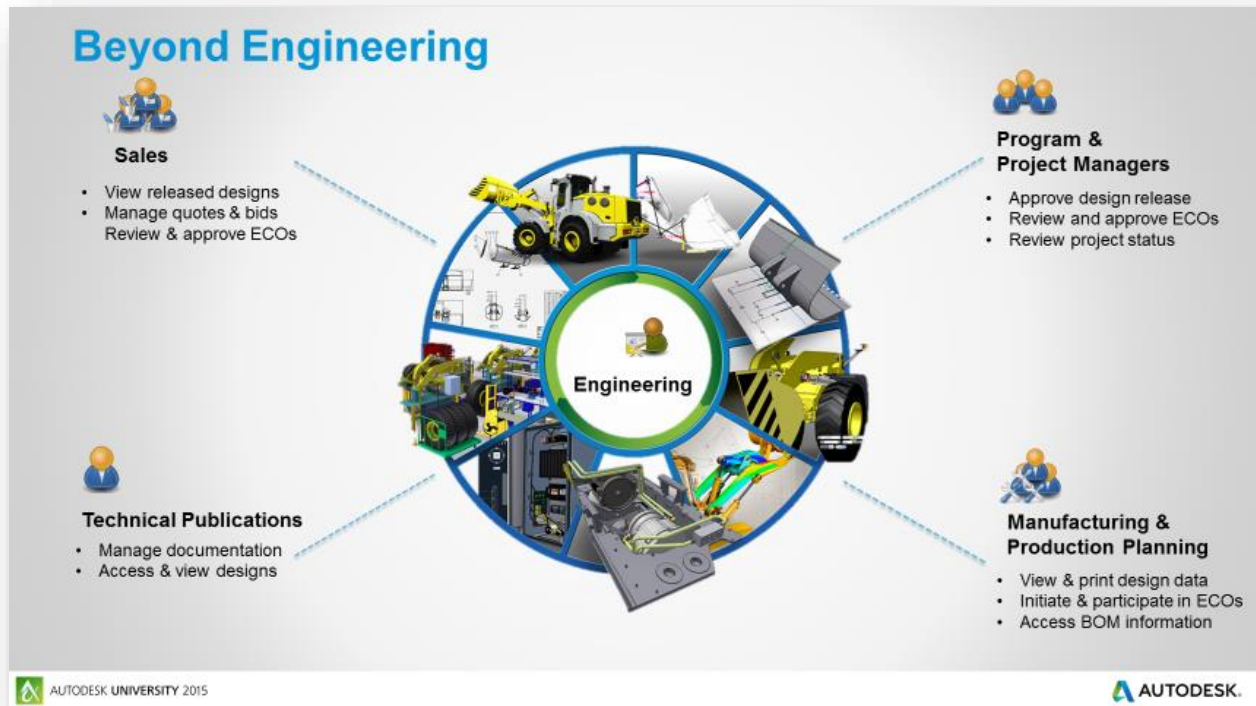
But there are other personas and divisions in a company who can participate to certain process. Traditionally these are:

- Sales
- Program & Project Manager
- Technical Publications
- Manufacturing
- Production Planning
- Service

Each of them have specific requirements to consume, enrich, create new data and/or participate on release or change order processes or simply generate reports to use them in a following process.

Beyond Engineering

Here some examples of Personas, their role in a company and the specific needs:



- People in the sales department..
 - ..need often to have access to released design data to sell a product or discuss their solutions with a customer.
 - ..are creating quotes and bids reviews which have to be managed and linked to the related project for documentation reasons.
- People who are creating technical documentations..
 - ..need to access the CAD data to be able to provide a technical documentation just in time so the machine can be delivered to the customer.
 - manage and link the created documentation to the project for e.g. service and maintenance tasks.

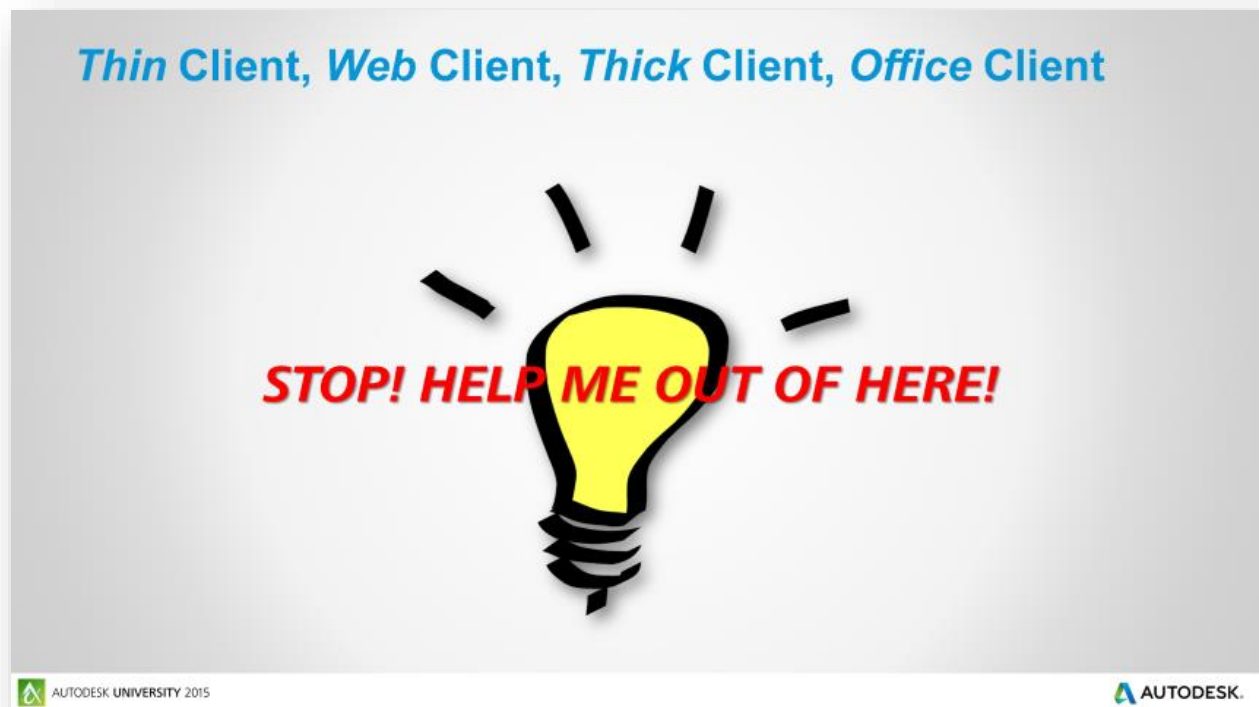


- People on the shop floor..
 - ..need to access the released drawings and BOMs to be able to produce parts and assemblies based on the latest versions of the drawings and view the design for a better understanding how things fit together.
 - ..need to communicate issues in the design and request changes for an existing design.
- Program & Project Managers..
 - ..need to review, check and approve a design
 - ..need to review and approve changes on the design e.g. by a ECO
 - ..need to create reports to get a better understanding about the status of a current project

All this needs and processes can be addressed by Vault Office.



Technology, License Types & Installation



Technology

There are two technologies for using Vault Office:

- Thin Client
- Thick Client

Here you can find the system requirements for the Thick and Thin Client:

<https://knowledge.autodesk.com/support/vault-products/troubleshooting/caas/sfdcarticles/sfdcarticles/System-requirements-for-Autodesk-Vault-products.html>

License Types

Note: All Vault Office capabilities require a Vault Workgroup or Vault Professional deployment. Certain features of Vault Office are available only when used with Vault Professional.

Vault Professional delivers out of the box read only access to the Vault by a Thin Client. It consumes no Autodesk license.

Note: Be aware that using this read only access requires a valid (CAL) license for the SQL server!



Today Autodesk offers these license types for Vault:

- Vault Workgroup
- Vault Professional
- Vault Office

A customer who is using Vault Workgroup can also benefit from the capabilities of Vault Office. With the Vault Office license he will have read/write access to the Vault using the thick or the thin client.

Installation

In General:

Before you can use the Vault Office Thin Client you will need to do a little pre-work:

<https://knowledge.autodesk.com/support/vault-products/learn-explore/caas/CloudHelp/cloudhelp/2015/ENU/Vault/files/GUID-5543B2AD-60C7-4BFF-9ABA-5FE3714CFFE4-htm.html>

In addition to that you will find here some more detailed information regarding the installation of Office Thin & Thick Client as well as the Server. This includes also the Version 2016:

<https://knowledge.autodesk.com/support/vault-products/learn-explore/caas/CloudHelp/cloudhelp/2015/ENU/Vault/files/GUID-3D96FE1D-CBB3-43DA-9DE5-4D9E4A8AD78F-htm.html>

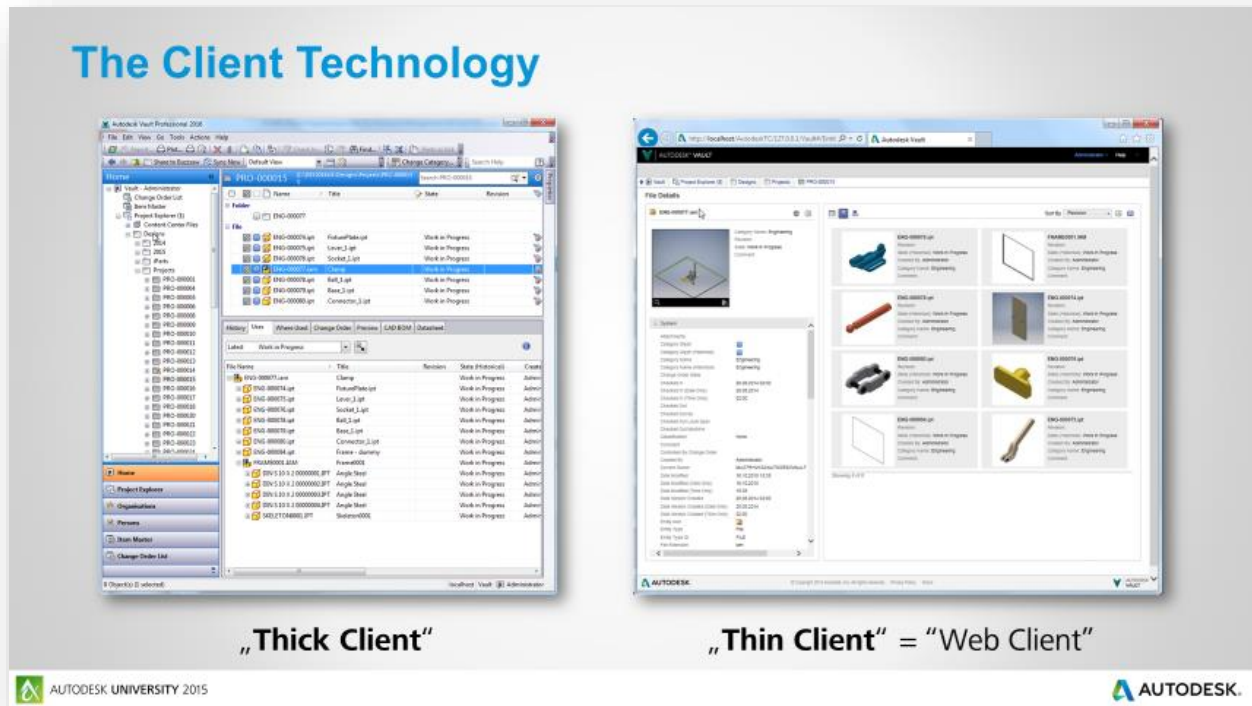
Here some important information regarding the Office Thick Client:

Vault Office Thick Client cannot be installed in parallel to another Vault Thick Client with the same version. So you have to make a decision if a certain computer should be used as Vault Office or Vault Workgroup/Professional. This effects also the MS Word, MS Excel, MS PowerPoint and MS Outlook Vault integration. In case these applications need to use a Vault Office license you will need to install the add-ins from the Vault Office media!



Figure Out the Differences of Technology and License Types

For a clear understanding you can see here the difference between Thin and Thick Client:



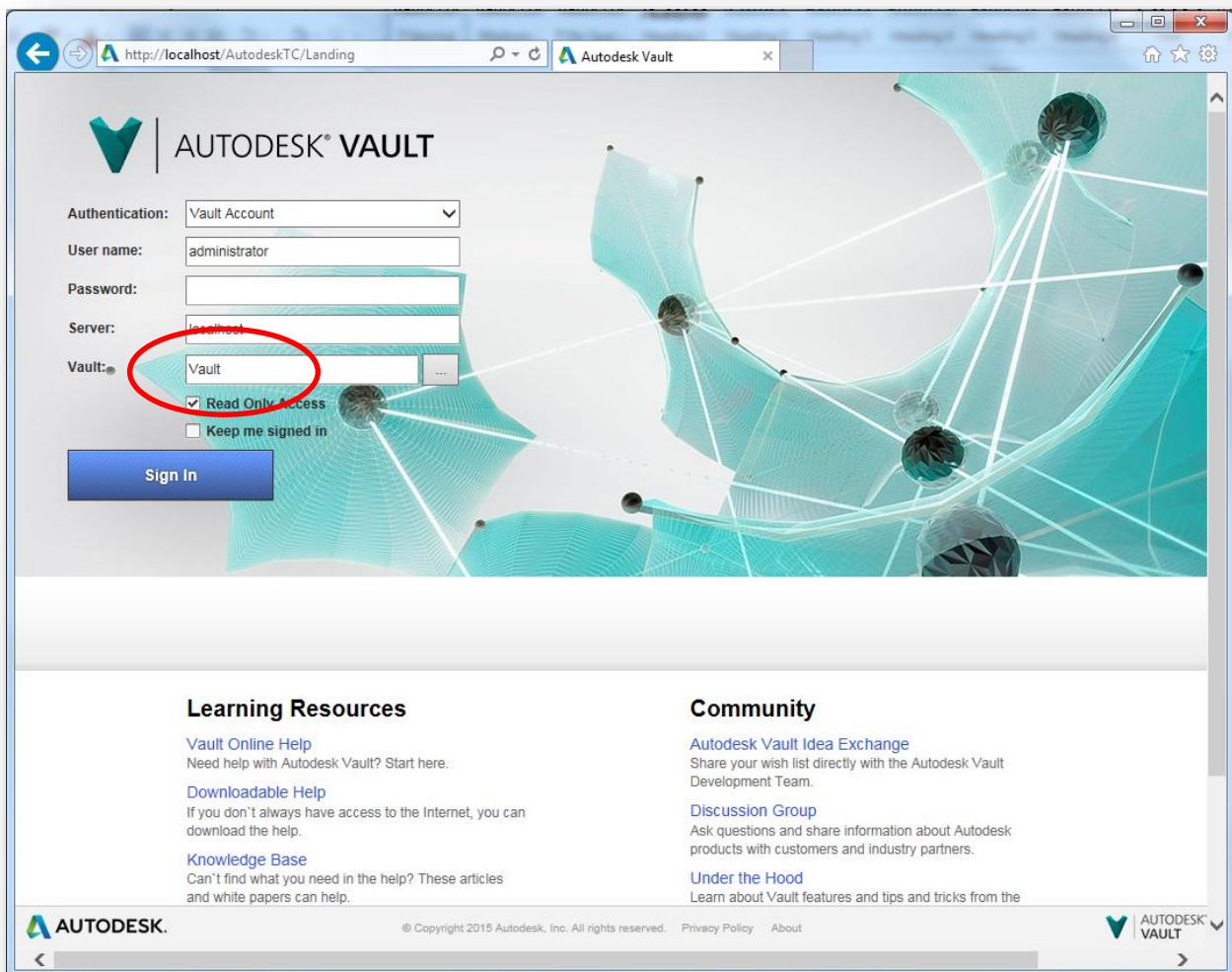
The Thick client has the same look and feel like the Vault Explorer. It needs a full installation as mentioned before.

The Thin Client – also sometimes named “Web-Client” uses e.g. the Internet Explorer.

Which Functionality provides the read only Thin Client which is included in Vault Professional?

With the Vault thin client of Vault Professional users are able to access to Vault:

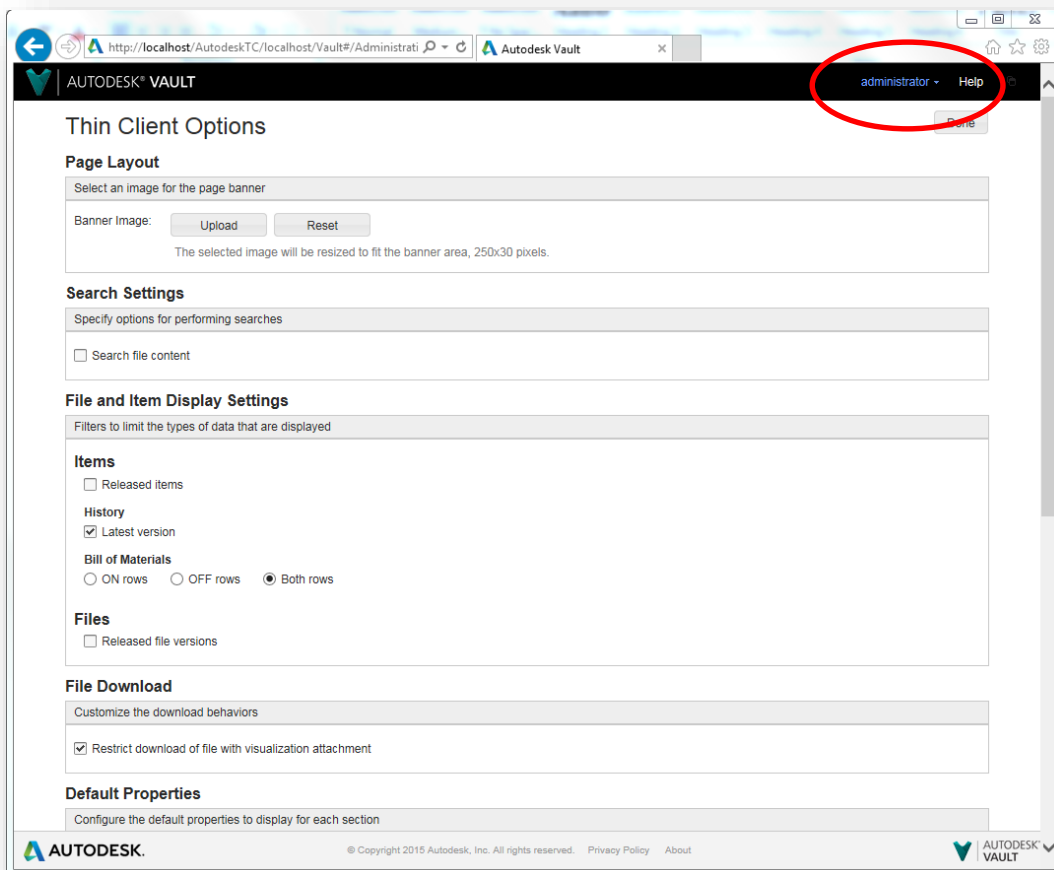
- Log in to Vault with read only access
- Download native or visualization files
- Search across Vault (quick search, advanced search)
- View items & BOMs incl. structure (uses, where used)
- View relationship of CAD files (uses, where used)
- View CAD data with Design Review (needs to be available on that computer)
- Browse through folders
- View folder information
- Access can be restricted by groups/roles
- Configuration of columns and visibility of released data and more



Which Functionality provides the Vault Office Thin Client?

With the Vault Office thin client users are able to access to Vault:

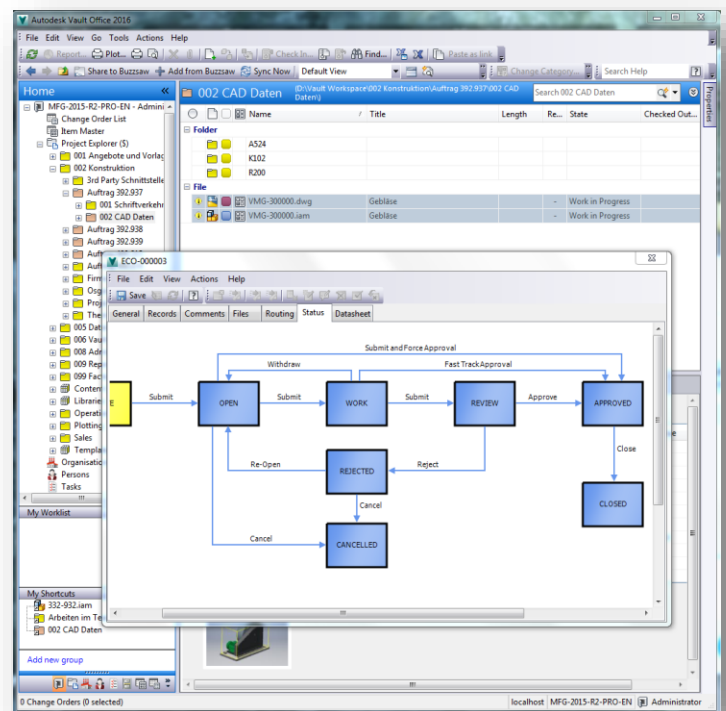
- Log in to Vault with read and write access
- Create new and modify existing Office documents by using the MS Office add-in
- Download native or visualization files
- Add new non-CAD files
- Check out and check in non-CAD files
- Search across Vault (quick search, advanced search)
- View items & BOMs incl. structure (uses, where used)
- View relationship of CAD files (uses, where used)
- View CAD data with Design Review (needs to be available on that computer)
- Browse through folders
- View folder information
- Access can be restricted by groups/roles
- Configuration of columns and visibility of released data and more



Which Functionality provides the Vault Office Thick Client?

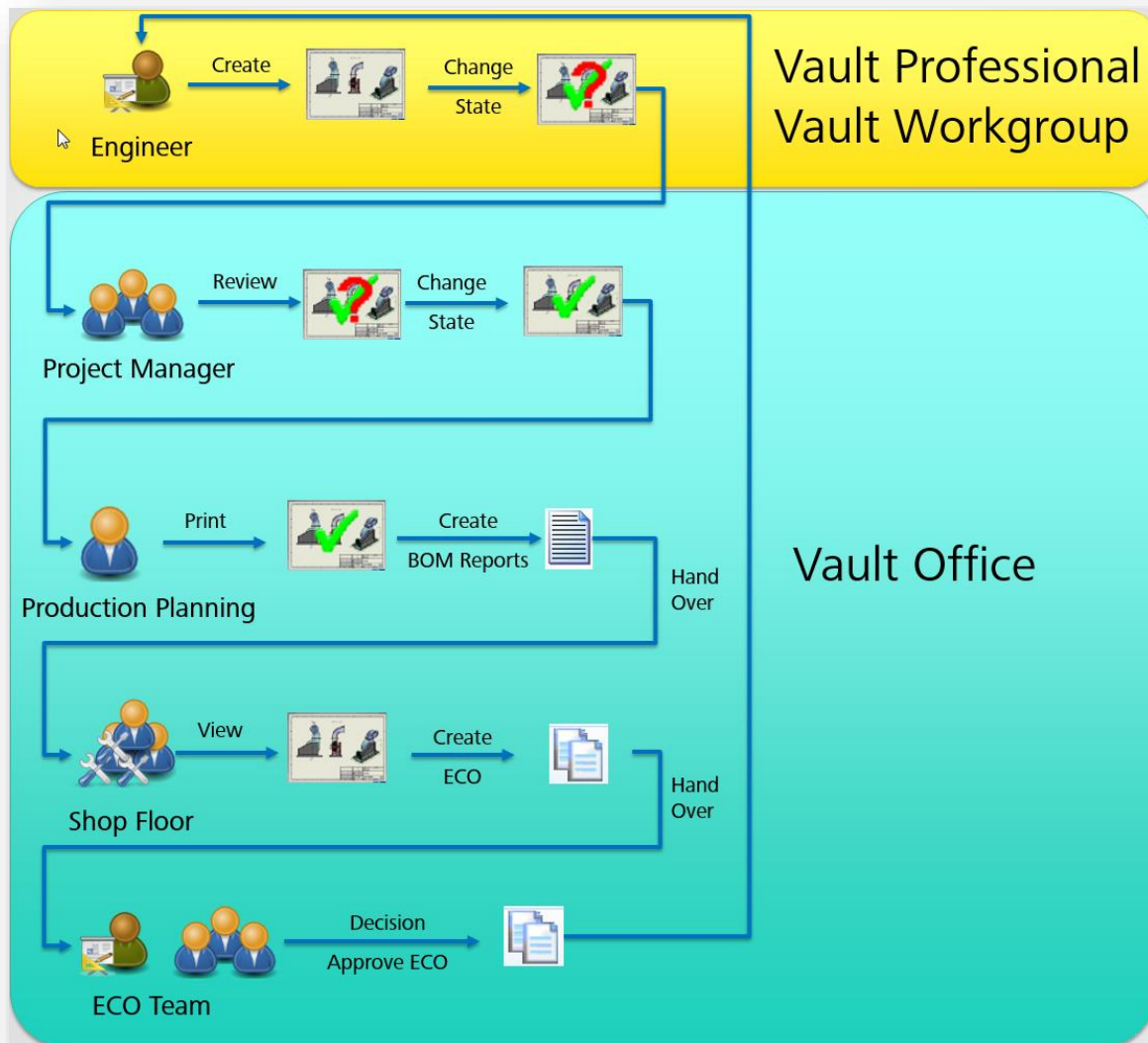
With the Vault Office thick client users are able to access to Vault:

- Log in to Vault with read and write access
- Create new and modify existing Office documents by using the MS Office add-in
- Create new and modify existing Office documents directly out of Vault
- Use Vault Data Standard
- Participate on workflows based on custom objects
- Participate on workflows to review/release/revise CAD-data
- Participate on workflows to review/release/revise Items
- Participate on workflows to review/release/revise non-CAD data
- Participate on ECO workflows
- Export files with Pack&Go
- Download native or visualization files
- Add new non-CAD files
- Check out and check in non-CAD files
- Full search & filter capabilities of Vault
- View items & BOMs incl. structure (uses, where used)
- Generate reports for items & BOM
- View relationship of CAD files (uses, where used)
- Generate reports for files & folders
- View CAD data with Design Review (needs to be available on that computer)
- Browse through folders
- View folder information
- Access can be restricted by groups/roles
- Configuration of columns and visibility of released data and more
- Job processor support (e.g. on change state)
- Create and delete links
- Use Plot Manager



Workflow Example

In this example you can figure out how Vault Office can be used. The **Engineer** is creating the design. He changes the state and hand over it to the **Project Manager** to review the design based on the drawings and 3D models. After the **Project Managers** have released the design the **Production Planning** can start to print out the drawings and creating BOM reports to hand that over to the shop floor. At the **Shop Floor** people can view the 3D models and in case there is a design error or the need to optimize the design they can just open an ECO and mark up what should be changed. The **ECO Team** can now decide if the ECO will be approved or rejected.



Summary

With Vault Office departments beyond CAD can benefit from accessing the existing data like drawings, items and BOM and are able to participate to business processes and workflows. They can create, modify and enrich data and link them to projects and other object types within Vault and share that information across the company.

Summary

- Share and enrich data & information across the company
- Use the technology which fits best
- Easy to access
- Participate to Workflows and Processes

