

AUTODESK **UNIVERSITY** 2013

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

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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

About the Speaker

Adam is a Sr. User Experience Designer and has been with Autodesk for over 11 years. Years of experience with Autodesk's data management software has allowed Adam a significant role in improving the experience and quality along the way.

Each year, educating and interacting directly with the user community at Autodesk University has always been a top priority for Adam.

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Introduction

There is a good chance that you are not utilizing the entire set of Vault functionality that is available. It is not for lack of knowledge or expertise. It is most likely because the functionality is not as obvious as it **should** be.

As a user experience (UX) designer, it is my job to make features discoverable, functional, and usable. The reason I am teaching this course at Autodesk University is because I feel that we, as UX designers, have not made all of our features as discoverable as we could have. It is my intention to bring these features to your attention.

I want you to take what you have learned from this course to find ways that you can incorporate it into your Vault workflows. By doing so, 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.

Section 1: Organize and Manage Vault Data

This first section of the course will focus on a set of features that will help to make your data more **organized** and **accessible**. These are the less noticed features and more like modifications to your tools that pack a punch in productivity improvements.

Filtering Data

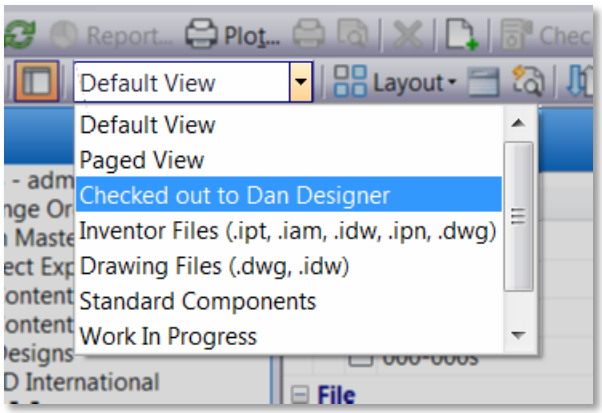
What does it mean to filter your data?

To filter your data means to separate, condense, or refine the large collection of data to only what you care about.

Most systems hold massive amounts of files in large containers. It can be difficult to locate specific files when it is buried among hundreds or sometimes thousands of files. These features will filter down that data into the data you are looking for.

Custom Views

Custom views allow you to customize your view of any Vault data (files, folders, items, change orders, and custom objects).



Create a Custom View

1. Choose "Define Custom Views" from the bottom of the pick list.
2. In the "Manage Custom Views" dialog, choose the "New" button.
3. Provide a view name.
   Result: The view will be added to the list.

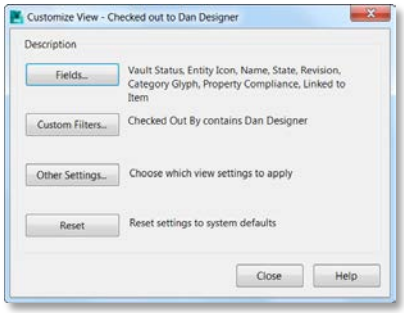
Edit a Custom View

1. Choose "Define Custom Views" from the bottom of the pick list.
2. In the "Manage Custom Views" dialog, choose the custom view that you want to modify.
3. Choose the "Modify" button.
4. In the "Customize View" dialog, choose what you would like to modify.

Customize View Fields

1. Choose the "Fields" button.
2. Configure the fields that you want to show up when this view is chosen.

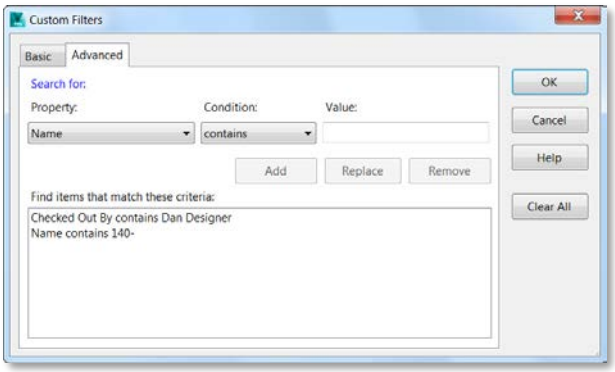
   Note: Some fields are used by more than 1 entity type and others are specific to 1 entity type. Filter the list when appropriate.



Filter View Data by Property Values

This feature allows you to refine the list of data down based on any property, action, and value combination.

1. Choose "Custom Filters…" button.
2. Choose any property to filter by.
3. Choose a condition. This field determines the ***action*** of the filter.
4. Enter the value that you want the filter to act on.
5. Add the criteria to the filter.
6. Close or add more criteria.



View Grid Settings

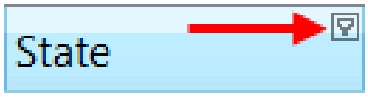
☑ Show grid lines – Turns grid lines on or off when the custom view is chosen.
☑ Show 'Group By' box – Toggles the visibility of the 'Group By' box when the custom view is chosen.
☑ Show Auto Preview – Toggles Auto preview on and off when the custom view is chosen.
☑ Automatic column sizing – Toggles the grid column sizing when the custom view is chosen.

General View Information

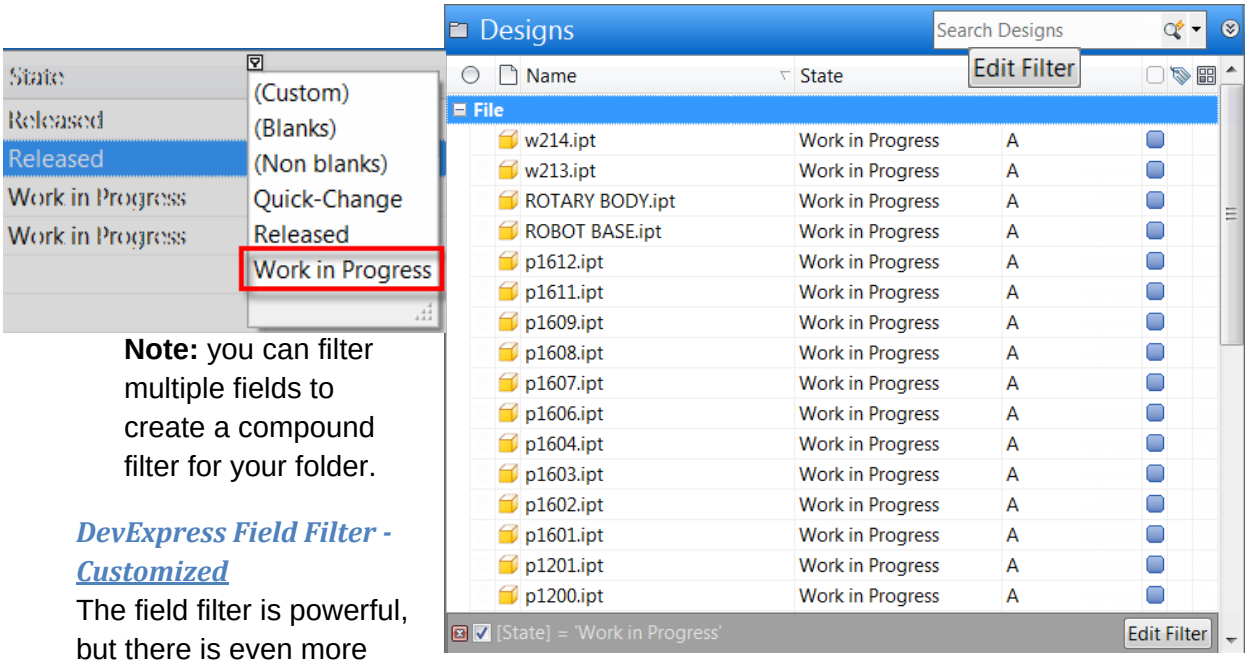
- When a custom view is chosen on a folder, that view will be remembered for that folder. The view is not used for all other folders.
- Grouping by fields is saved on the custom view, even though it can't be configured in the custom view dialog.

Field Filter - Standard

Within the header of each grid column is a very small button that allows the user to apply a filter based on the values of that particular column.



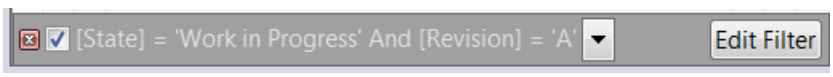
1. Determine what column you want to filter values on.
2. Hover the cursor over the header for that column.
3. Notice the filter icon that shows up in the upper-right corner.
4. Click on the filter icon.
   This will display a list of all values for this field.
5. From that list, choose the value you want to filter the view by.
   Example: If you choose to filter on the state column, you will get all state values for that view. Choose "Work in Progress" to display all rows that are in that state.
   Result: The only files shown in the view are files with the state of 'Work in Progress"



Note: you can filter multiple fields to create a compound filter for your folder.

DevExpress Field Filter - Customized

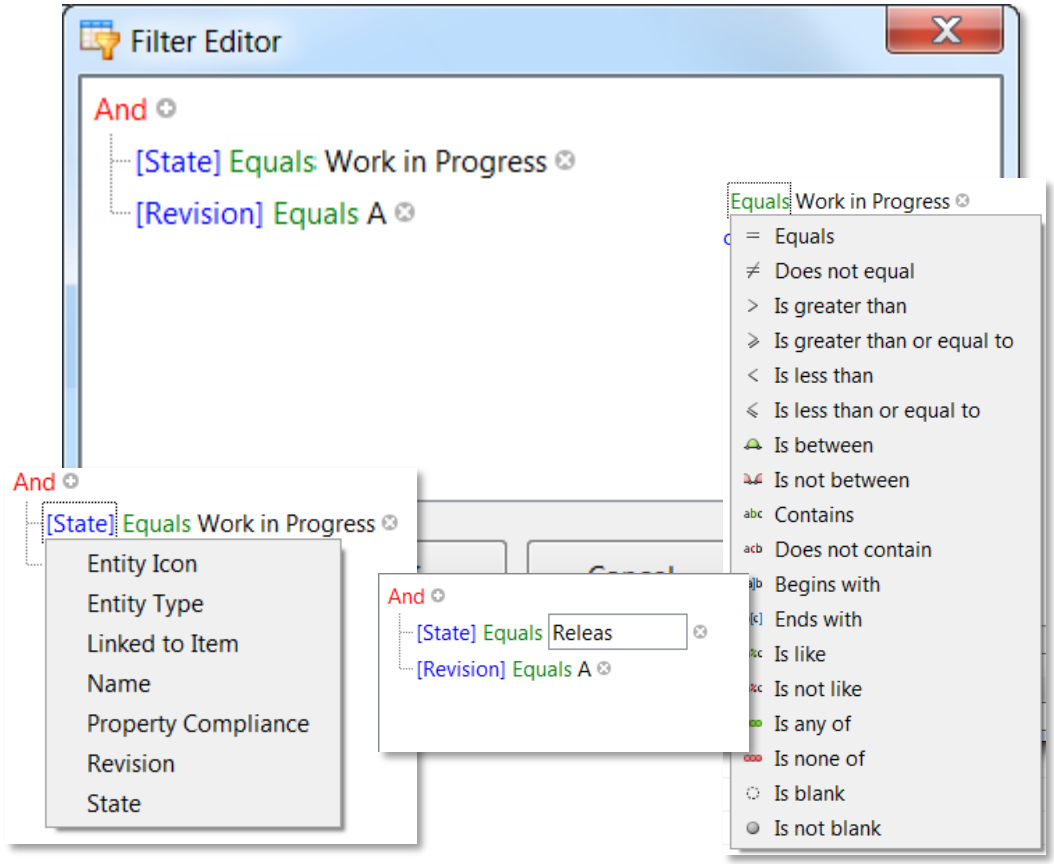
The field filter is powerful, but there is even more functionality available now that the view is filtered. When your view is filtered, a **toolbar** populates at the bottom of the view.



The filter toolbar allows you to remove the filter, enable or disable the filter, choose from a list of historical filters, and **customize** the applied filter.

Customize Filter

1. With the view filtered, choose the 'Edit Filter' button in the filter toolbar.
   Result: the 'Filter Editor' dialog populates.



   Any of the settings shown in this dialog can be modified by selecting them.
2. Click on the property (blue value) and choose any other property from the list.
3. Click on the condition (green value) and choose any condition from the list.
4. Click on value and you can hand-type in any value you want to filter by. For example, change the value to Released.

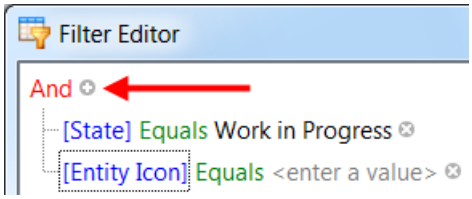
Notice there is a much bigger selection of conditions available here than in the Vault interface. This is a DevExpress tool that the development team has made available through the UI.

5. Choose OK in the Filter Editor and notice the change has taken affect.

Compound Filters

Another feature that the DevExpress toolbar gives you is the ability to have more than one filter applied at the same time.

1. Apply a DevExpress filter to your view.
2. Choose the Edit Filter button.
3. Choose the '+' button next to the red And.

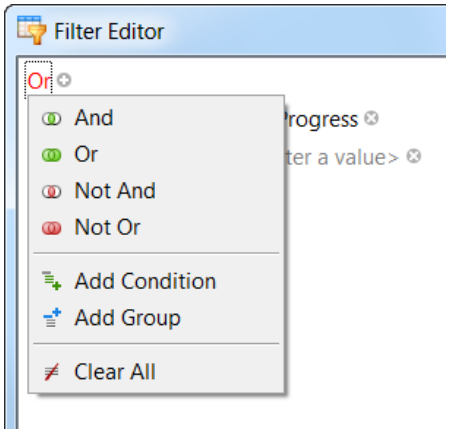


With another node added, you can configure another filter to work with the first one.

Changing the Master Condition

With more than one filter being applied, it can be useful to change the condition controlling the 2 or more lines.

1. Select the red And.



2. From the menu that populates, choose any of the options to make your filter more powerful.

Search

For any data management product, being able to search for the data is critical and Vault offers many search options. This section will describe a few unique saved search settings and a slightly hidden search command that you might not be aware of.

Saved Search

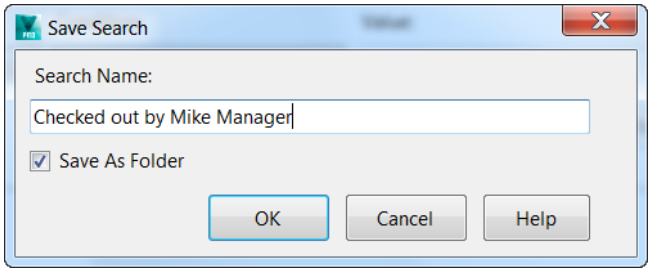
You are likely familiar with the ability to save searches. Saving the search allows you quickly access searched data that is updated each time you view it.

This section will show you how a few interesting searches that can be really helpful by using particular properties to search on. They essentially will act as live reports that are updated when you choose them.

Checked Out by <name>

Why is this useful? This search is useful because it allows you to quickly see all of the files that are checked out to you or someone else you're interested in. Create multiple of this search to track yours and your reports.

1. Choose 'Find' command.
2. Choose the following parameters:
   Property: Checked Out By
   Condition: Is
   Value: <user name>
3. Choose Add button.
4. Save and give it a useful name.
5. Choose the search under "My Saved Searches".



Last Modified by <user name>

Why is this useful? This search is useful because it allows you to quickly see all of the files that have been modified by your or someone else you're interested in. Again, create more than 1 of them to track yours and your reports or your coworkers.

1. Choose 'Find' command.
2. Choose the following parameters:
   Property: Created By
   Condition: Is
   Value: <user name>
3. Choose Add button.
4. Save and give it a useful name.
5. Choose the search under "My Saved Searches".

Controlled by Change Order

Why is this useful? This search is very useful because you may want to track what files and items are tracked by a change order.

1. Choose 'Find' command.
2. Choose the following parameters:

Property: Controlled by Change Order
Condition: is true
Value: n/a

3. Choose Add button.
4. Save and give it a useful name.
5. Choose the search under "My Saved Searches".

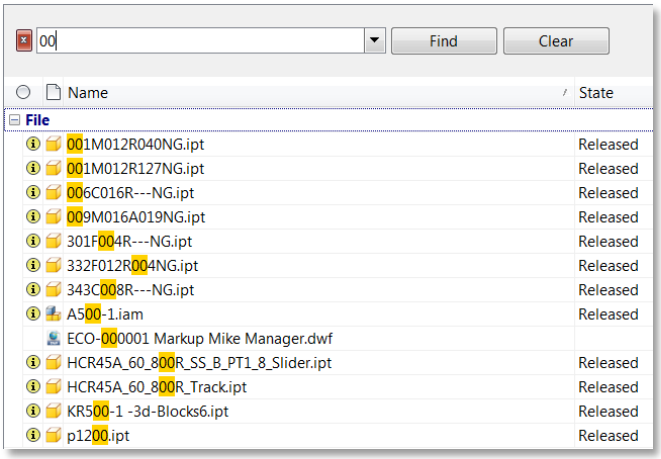
Change Order State

Why is this useful? Keeping track of change orders can be difficult. Especially change orders that are not currently in a state that requires action by you. This search is like a live report that shows you a list of change orders in particular states.

1. Choose 'Find' command.
2. Choose the following parameters:
   Property: Change Order State
   Condition: is
   Value: Approved, Check, Closed, Create, Open, Rejected, Review, or Work
3. Choose Add button.
4. Save and give it a useful name.
5. Choose the search under "My Saved Searches".

Grid Quick Find

The quick find is a great tool that was added a few releases ago. It was not developed by us, but it is available to us because we are using DevExpress.



Why is this useful? This particular grid find is useful for several reasons:

- Because it is available in any of the main grids as well as the Open from Vault dialogs in the add-ins.
- It filters the data as you type.
- It highlights the searched text.

Steps:

1. Right-click on the grid header of any main grid (Project Explorer, Item Master, Change Orders).
2. Choose 'Show Find Panel'
3. Type your search value into the empty field.
   Notice: As you type, the view is being refined down to only objects containing the entered text.

Access

In this section, to provide access means to get you to your data easily and effortlessly.

Copy/Duplicate Folder Structure

Why is this useful? There are many companies that replicate folder structures every time a new project is born. What for some, this means building the same folder structure inside of Vault every time. This workflow allows you do it in about 3 clicks.

1. On disk, choose the top node of the folder structure that you are replicating.
2. Drag and drop that folder to the destination folder in Vault. No files are necessary for this workflow. If files exist in the folders, they will be added appropriately.
3. Make appropriate choices on the add dialog.
   Result: Folder structure is built inside of Vault.

Go To Working Folder

Why is this useful? Opposite of the section above, you may want to be able to duplicate the Vault structure on your local machine.

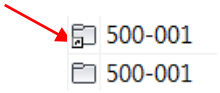
1. In Vault, choose a file or folder at the base of the folder structure that you are replicating.
2. Right-click on that file/folder and choose "Go to Working Folder".
   Result: Entire Vault folder structure is built on disk.

Vault Links

Vault links are a feature that was implemented in the 2012 release of Vault products.

Exact Representation of an Object

Vault Links are an exact representation of the object it was created from. They can be created from all entity types and placed into any folder within the Vault folder structure.



A link will have almost the exact same appearance as the source it was created from. The name is always the exact same, the properties are always the exact same and any changes made to the source of the link are shown by the link immediately. The only visual difference between a link and its' source will be a shortcut overlay that appears over the entity icon.

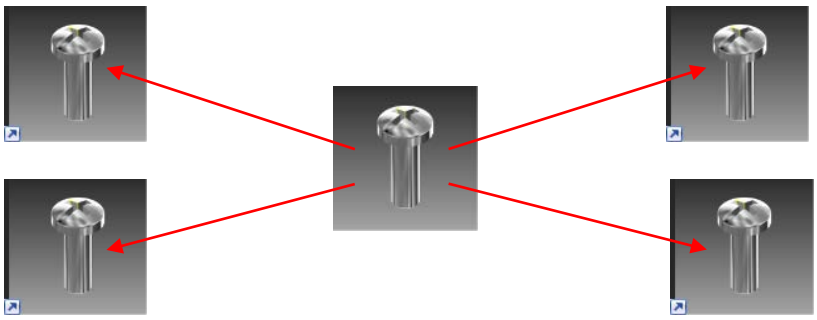
A Vault 'Shortcut' to Extend Beyond the Individual Machine

Links can be thought of like a shortcut in that they represent a source object that exists somewhere else in the Vault. The user can create a link that allows them to reference their data in any folder instead of being restricted to the folder structure that was determined by the CAD application.

And unlike the existing shortcut functionality, links are available to all users in the Vault and not just to one user on one machine.

Multiple Links to One Source

There is no limit to the number of times an object can be linked within the Vault. For example, one file can be linked into any number of folders. While there maybe be multiple links to one source, that source object lives in only *one* place in the Vault.

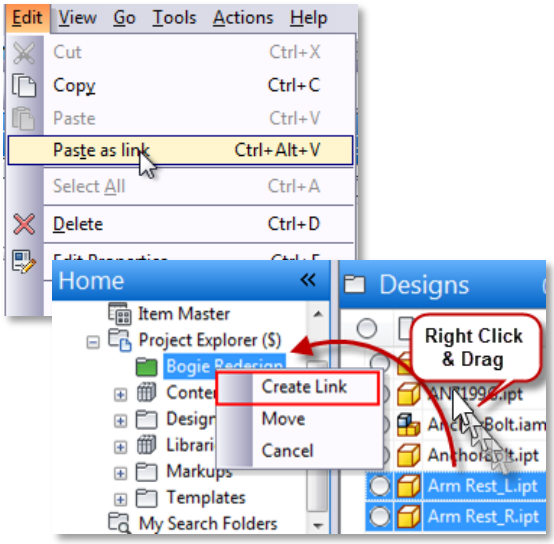


Creating Vault Links

Creating links is easy because it is done through simple and familiar workflows. Link creation is done through "Copy" and "Paste as link" and drag and drop workflows.

Edit menu> Copy and Paste as link

1. Select a Vault object (file, folder, item, custom object or change order)
2. Choose Copy from the Edit menu.
3. Select the destination folder.
4. Choose Paste as link from the Edit menu.



CTRL-C and CTRL-ALT-V (to paste as link)

1. Select any object.
2. Choose CTRL-C on the keyboard.
3. Select the destination folder.
4. Choose CTRL + ALT + V on the keyboard.

RMB click, drag and drop > Create link

1. Select any object.
2. Select the Right-Mouse-Button on the mouse and drag the object to the destination folder.
3. Select the 'Create Link' command from the context menu that populates.

LMB, click and drag for ITEMS and ECOs

1. Select any item or change order.

2. Select the Left-Mouse-Button on the mouse and drag it to the destination folder.
3. Select the 'Create Link' command from the context menu that populates

**This works for items, custom objects, and change orders because these cannot be physically moved into folders*

Operating on Vault Links

A file, folder, item, custom object or change order still resides in only one place in the Vault. A link represents the source object and allows the user to act on it as if the source object was in that location.

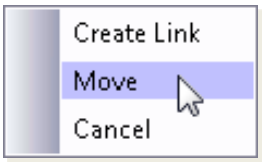
The user can perform commands on source objects by executing the command on the link. For example, a user can rename a file by right-click on the link and performing rename. The source file is renamed and the link immediately reflects the rename. The link will **never** have a different name than the source.

Any command available from a source will be available from its link. This allows users to execute commands from the context of their project instead of having to navigate throughout the Vault to operate on the source.

All commands executed from a link are executed on the source of the link **except** for the following 2 commands:

Delete – Choosing the delete command from a link will **delete the link** and not the source.

Move – Choosing the move command from a link will **move the link** and not the source



Source of a Links Resides in One Location

While all of the commands (mentioned above) can be executed from a link, it is important to understand that the source of a link resides only in one location in the Vault. So any time the file is downloaded, whether from the file itself or from a link to that file, it will be downloaded to the location of **the source file**. Essentially, that means the file will be downloaded to the expected location in the local workspace.

The point to take away is that **the files are not downloaded to the linked location in the workspace**.

Contextual Interface

Since Vault projects allow you to use links to bring data of all types together in one place, access to the commands of the specific data type is critical.

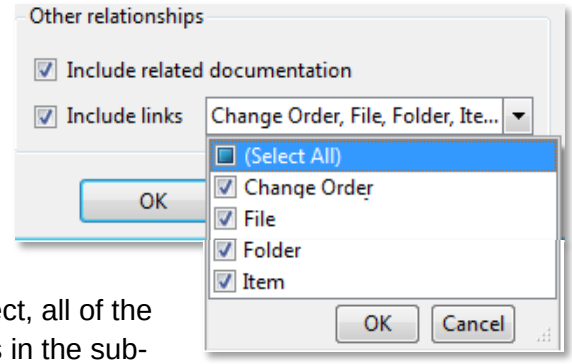
To eliminate the need for switching between the project explorer, item master, and change order list, all of the commands needed for that type have been made readily available. This was done by creating a contextual interface.

This means when a file is selected, the commands for files become available. In addition, you will see file properties in the property gird, file tabs in the preview pane, the context menus, and the appropriate file menus. Selecting any entity type in the folder will produce the interface needed to operate on that entity type.

Including Linked Data in Vault Operations

'Include Links'

Throughout the Vault, certain commands allow the user to take advantage of the links that have been strategically placed. Downloading a project, checking in a project, and reporting on a project have all been enhanced to extend the scope of affected files to linked data.



Get/Checkout

When the Get/Checkout command is chosen for a project, all of the files that reside in the selected folder as well as the files in the sub-folders are included in the download. Including links to files, project folders, items, and change orders allow the user to include the source data of the links.

For example, if a user has create a project folder that contains links to files and performs a download on the folder, all of the source files of the links will be included in the download. Including links to folders will include all of the files that are contained in the linked folder. Including links to items will include the primary link file of the item and including change orders will either include the file the change order was created for or will include the primary link file of the item it was created for.

Section 2: Vault Features You May Not Know About

This section of the course focuses more on the larger features in Vault.

Vault Explorer Features

These features reside in Vault Explorer and simply do not fall under any other category.

Custom Objects

What is a Custom Object? Custom objects can be anything that you want them to be. That's the 'custom' part in the name. The administrator can create this object and make it look how they want it to.

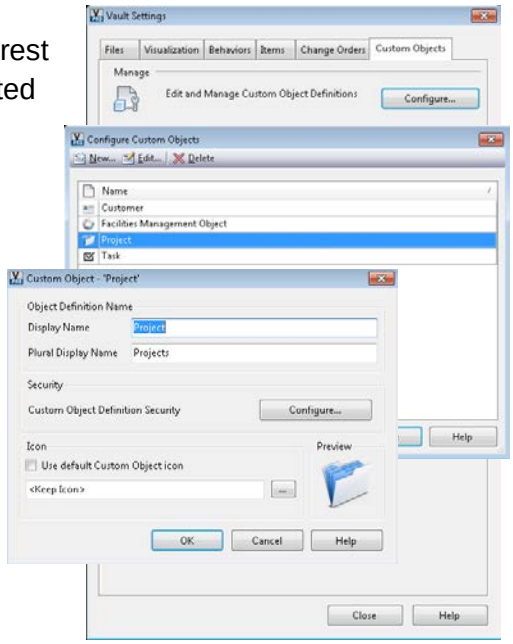
Custom Object has been added as a new object type in the Vault and are available in Autodesk Vault Professional only.

Defined through the administration interface

While typical systems require a lot of coding to create customizations, a Vault administrator has the ability to choose the appearance and function of custom objects entirely through the interface. No development skills are required. (**Error! Reference source not found.**)

Deep integration with Vault features

The Custom Objects come integrated with existing Vault functionality. Simply give the object some definition and the rest is done for you. Out-of-the-box, Custom Objects are integrated with:



- Main user interface
- Categories
- Lifecycle definitions
- User defined properties (UDP's)
- Security
- Vault add-ins
- And more!

Create a Custom Object

1. To create custom object definitions, choose the 'Configure' button from the Custom Objects tab as showing in **Error! Reference source not found.**.
2. From the Configure Custom Objects dialog, choose the 'New' button.
3. In the 'Custom Object – New ' dialog, give the object a singular and plural name.
4. Choose the 'Configure' button and assign security to the desired users.
5. Browse to an ICO file to represent the custom object icon, or check the box to use the out-of-the-box default icon.
6. Log out and log back into the Vault to see the custom object definition in the user interface.

Create a custom object category

1. Open 'Configure Categories' dialog.
2. Change filter to 'Custom Object Categories'.

3. Create a new category and name it in a way that aligns well with name of the custom object.
4. Assign a category glyph color and provide a useful description.
5. With the category selected, assign a lifecycle definition to the category.
6. From the properties tab, assign properties to the category.

Create a custom object category assignment rule

1. Choose the Rules button from the 'Behaviors' tab.
2. In the 'Assignment rules' dialog, choose 'New' and select the custom object category.
3. In the 'Rule Condition Builder', there are 2 methods you can use to assign the category:
4. Custom object system name – is - <system name>
5. Custom object name – is - <custom object name>

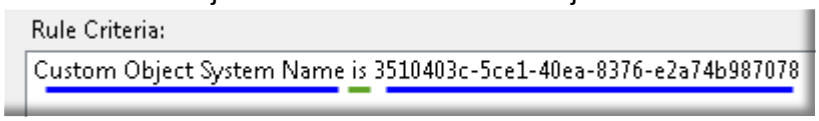


Figure 1 - System Property

Note: the system name can be found in the properties grid when an instance is selected in the main grid.

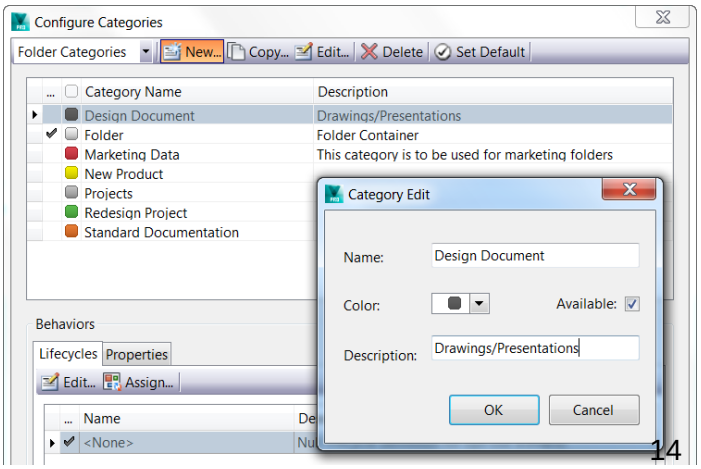
Lifecycles on Folders

Vault Collaboration, Workgroup, and Professional all provide the powerful ability to drive file lifecycle, security, and properties with categories and lifecycle states. In the 2012 release, that functionality was extended to Vault folders.

Categories on Folders

Why is this useful? Categories on folders provide the same benefit as they do on files. They help to define the purpose or the intent of the folder. In addition, lifecycle definitions can be assigned to the folder from the category.

1. Navigate to Administration>Vault Settings>Behaviors tab.
2. Choose the Categories button.
3. In the Configure Categories dialog, notice "Folder Categories" shows in the filter.
4. Choose "New".
5. Provide a name, glyph color, and description.
6. In the Lifecycles tab, assign one or multiple lifecycle definitions.



7. In the Properties tab, assign all of the properties that you want assigned to the folders.

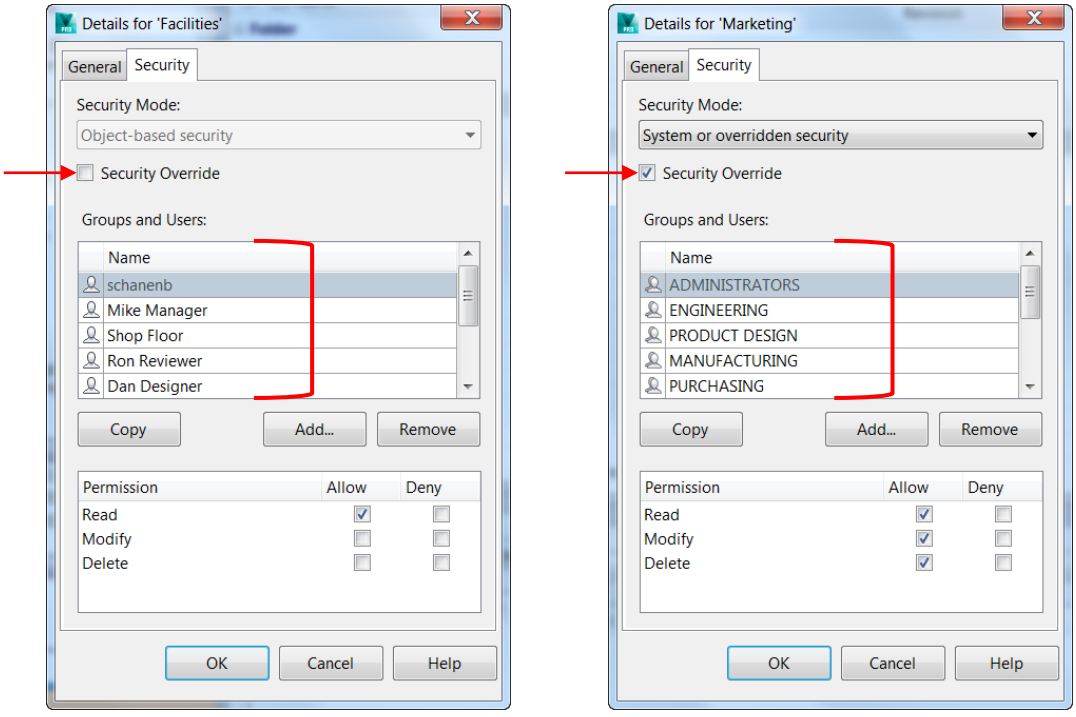
Result: Once a category is assigned to a folder the folder will now inherit the following:

- All properties assigned to the category.
- A lifecycle is now assigned to the folder.
- The default lifecycle state is assigned to the folder.
- The security configured for the default state is applied to the folder.

Lifecycles on Folder

Why is this useful? Vault lifecycles control state, state security, transition security, and comments for folders. The lifecycle can be used to give Vault folders state as well as override the existing folder security.

1. Set the security of a folder.
   Notice: there is currently no override applied and the access control list has been configured for the folder.
2. Choose the folder and apply a category.
3. View the security of the folder.



Notice: there is now a security override applied to the folder and there is a new access control list applied.

Impact on Folder Content
What's even more interesting about the security override on a folder is that the content will be impacted by this change. The override on the folder is shared by the content.

Workspace Sync
Basic text

Edit Properties
Why is this useful? This tip will be useful because edit properties has been made more accessible and expanded to allow the user to edit multiple properties on multiple entity types.

Access from Vertical Grid
The vertical property grid gives you quick access to the metadata of selected objects. When editing properties, it takes a few steps to customize the Property Edit dialog to display only the properties you're interested in.

1. Choose several files in the current view.
2. In the vertical property grid, choose 1 or more properties.
3. Choose the 'Edit Selected Properties' button from the grid header.
   Result: Property Edit dialog populates with the selected file(s) loaded. More importantly, the properties that you chose are pre-loaded into the grid for you.
4. Modify the properties and choose the 'OK' button.

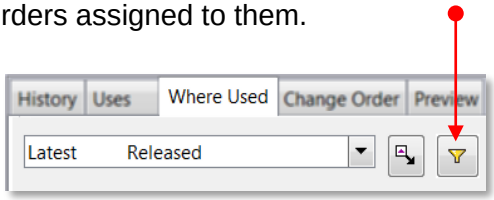
Multiple Entity Types
The edit properties dialog has the ability to edit properties on more than 1 entity type (*entity = files, folder, items, change orders, and custom objects*). Why is this useful? This is useful for a few reasons.

- Until this feature, item property editing had to be done 1 at a time.
- Users can edit properties of folders and files (for example) at the same time.

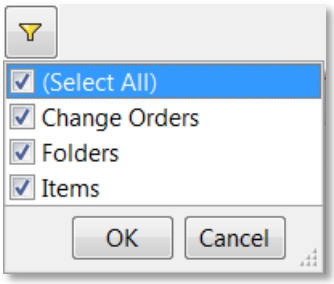
Steps:
1. Multi-select a file and a folder.
2. Choose the edit properties command (or Ctrl+E).
3. In the Property edit dialog, you can choose to show properties from any entity type.
   Hint: Some properties apply to more than 1 entity type.
4. Choose 'OK'.
   Note: You can edit items, change orders, and custom objects in this workflow too.

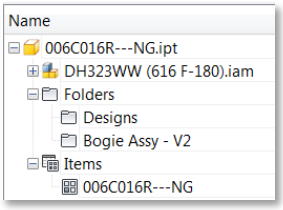
Where Used Content Filter

The content filter is available on the where used tab and allows the user to see "upstream" relationships of a file. Why is this useful? This is useful because files are used in many ways in the Vault. They are contained in folders, they might have Vault links to other folders, and can have items and change orders assigned to them.



1. Select a file or a group of files.
2. Choose Ctrl+C.
3. Navigate to another folder.
4. Choose Ctrl+Alt+V. A link to those files has been created.
5. With the same file(s) selected, assign them to items (Professional only).
6. Select one of the files and choose the "Where Used" tab in the preview pane.
7. Choose the Content Filter button (located next to the release bias button).
8. From the pick list of options, choose what content you want to view in the "Where Used" tab.
9. Expand the file node in the where used grid.
   Notice: The folder that the file resides in is shown. The folder that the file link resides in is shown (Bogie assy). Last, the item assigned to the file is shown.
   Bonus: Right click on any node and choose 'Go to'.





Category Assignment Rules (Course guide only)

If you are using categories to manage the security, lifecycle state, and properties of your Vault data, then you likely are using Category Assignment Rules to automatically assign the categories.

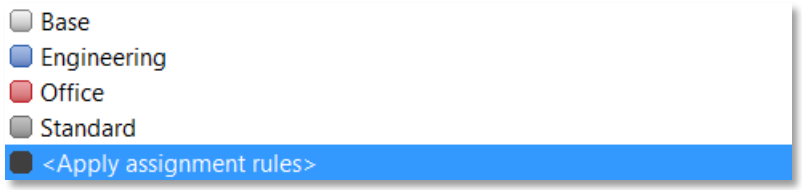
The point of this section is to highlight the ability to assign categories from within the "Change Category" dialog.

Why is this useful? This is useful because it allows you to choose a collection of files, folders, or custom objects and assign categories to them based on property criteria.

Steps:

1. Choose a collection of files, folders, or custom objects.
2. Choose the "Change Category" command.
3. From the Category pick list control, choose "<apply assignment rules>".

Result: all data gets assigned to the appropriate category based on the configured assignment rules.



Pack and Go

The pack and go feature is great for exporting or sharing "packages" of Vault data. All referenced files will be included in the package and they can all be sent to a disc folder or a mail recipient. As powerful as that is, there are some barriers. So, let's break down those barriers.

Pack and Go Saved Search

One of the frustrating limitations of pack and go is that you can only pack and go the contents of one view. That means you can select one file, a collection of files in one view, uses tab, or where used tab.

Combine the saved search functionality with pack and go functionality and you can frequently and quickly send packages of data to your recipients.

Steps:

1. Create a User Defined Property that identifies a collection of date (e.g. Project name).
2. Add this UDP to the project data. Remember this data can live in multiple folders and may be unrelated to each other.
3. Create a saved search that gathers data based on that user defined property.
4. View the saved search.
5. Choose Ctrl + A in the grid to select all files.
6. File>Pack and Go.
   Result: All files are collected from their locations and listed in the Pack and Go dialog. Use the "Include Dependents" command to bring in related data as well.

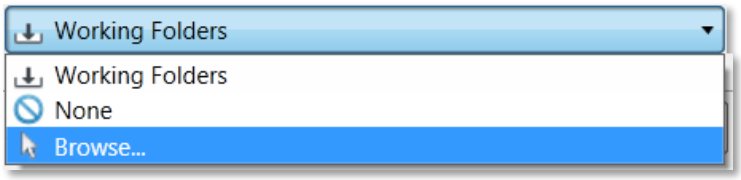
Another Pack and Go (Get/Checkout Work-around)

As the title indicates, this isn't an actual Pack and Go feature…but it's like one. This is a way to accomplish a similar result, but with a bit more power.

Why is this useful? This is useful because you can very easily gather an entire folder structure and export it to a local folder.

Steps:

1. Select the top node of a folder structure that you want to pack and go.
2. Choose the Get/Checkout command from the context or Actions menu.
3. In the Get/Check Out dialog, choose the dependent file gathering choices as needed.
4. Choose 'Browse' from the pick list at the bottom of the dialog.



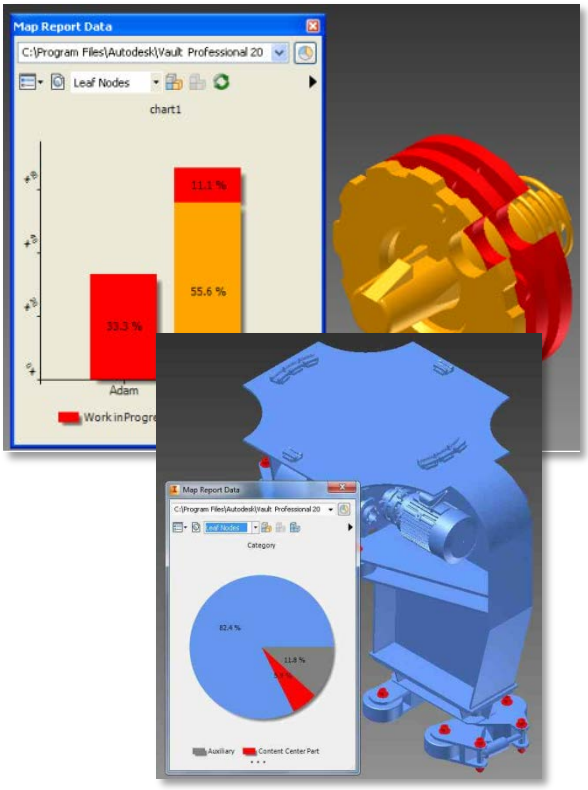
5. From the browse dialog, choose the folder you wish to export all of the Vault data to.
   Result: Folder structure and all files are downloaded to the desired location.
6. Zip the folder structure and send as desired.

Add-ins

Working from the add-ins is desired by those that don't want to leave the environment they are currently working in. There are a few add-in features that are very powerful…especially when used in the ways described in this section.

Data Mapping (Inventor)

Date mapping gives the user the ability to color-code Inventor components of an open assembly.



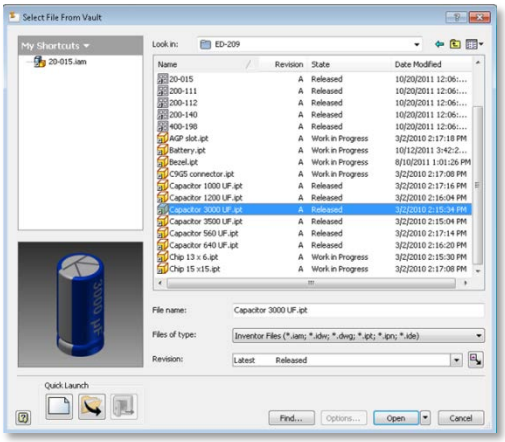
Why is this useful? Use this feature to powerful things like highlight all components checked out to me or controlled by a change order.

1. Open an assembly in Inventor.
2. Log into the Vault add-in.
3. Select the Vault ribbon (toolbar).
4. Choosing Data Mapping button.
5. From the pick list, choose to browse to a report template.
6. Choose a report template
   Note: templates are shipped and installed on your machine.
7. With a template chosen, select 'Generate Report'.
   Result: report/graph is shown in dialog.
8. Choose the 'Apply color mapping' command.
   Result: models receive the color shown in graph.

Navigation Through Vault Links

Earlier in this document, you learned how to create a Vault link. Those links provide powerful access from within the Vault Add-ins as well.

Why is this useful? You may want to work on files that are not readily accessible in the folders that you can navigate through in the add-in.



File from a link

Vault links provide the ability to access an entire folder's contents just by navigating (double clicking) through a link to that folder. The files that the user will see will be the files that are located in the actual folder location.

File associated with an Item

For Items and Change Orders, assume the role of a designer for this example. I know that there is a file edit needed and I know the name of the file but I don't know the location of it in the Vault. I could search for the file pretty easily, but what's even easier is going to the project folder that my administrator configured for me and see the items assigned to the files I've been working on. I know that the file that I need to work on is the primary link of this item. I can merely double-click on this item and the primary file is now shown and available for opening or placing.

File associated with a Change Order

Again, assuming the role of the designer, I have received an automated notification that a change order has shown up in "My Worklist". Instead of having to open up the Vault Explorer client, I can simply navigate to the Change Order link that was added to the project. Double clicking on the change order link will expose all files associated with the change order.

Steps:

- Create a link to a file, a link to a folder, and a link to an item. All links should be placed in 1 folder.
- In Inventor, bring up the Open from Vault dialog.
- Navigate to the folder that contains the Vault links.
  Notice: you can see the Vault links in that folder.

File:

- If you want to open the file that is linked, you can simple choose the linked file and select open. The target file of the Vault link will be opened.

Link to a Folder:

- If you access files from a linked folder, double click on the linked folder.
  Result: The files from the folder are shown in the dialog.

Link to an Item:

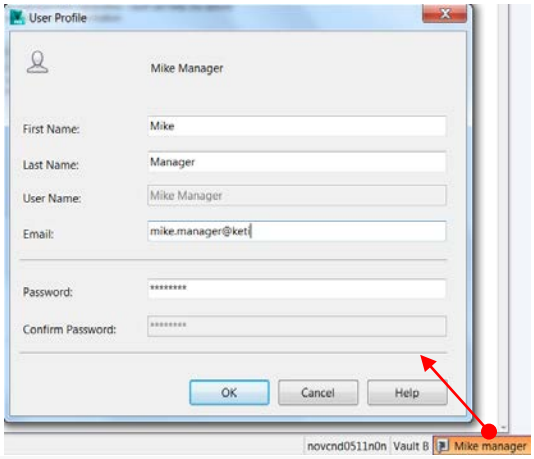
- Double click on the link to the item.
  Result: The files associated to that item are now shown and available to open.
- Select a file and choose "Open"
  Result: File is opened or placed in the Inventor assembly.

Section 3: Vault Tips and Tricks

This section of the course consists of smaller tips and tricks. These are still helpful but likely won't have as big of an impact on your work.

Profile Editor

By clicking on the username located in the bottom-right corner of Vault Explorer, you can modify your user profile settings. Modifications can be made to:



- Name
- Username
- Email
- Password

Autodesk Exchange Apps (App Store)

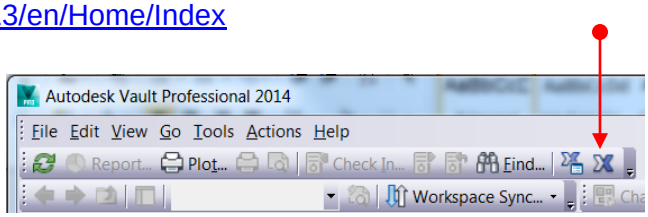
The "App Store" is a resource available to Autodesk users that is created by the community for the community. Autodesk Exchange Apps for Autodesk Vault helps you achieve greater speed, accuracy, and automation from concept to manufacturing.

Simply click on the Autodesk Exchange Apps Website button in your Vault toolbar.

http://apps.exchange.autodesk.com/VLTM/2013/en/Home/Index

Drawing Compare

Drawing compare is an app that is available in the Autodesk Exchange App store.



Autodesk Vault Drawing Compare allows users to select and visually compare different drawings, versions or revisions leveraging the attached dwf file to detect and highlight document changes.

http://apps.exchange.autodesk.com/VLTM/en/Detail/Index?id=appstore.exchange.autodesk.com%3adrawingcompare%3aen

Project Thunderdome

This particular utility comes from one of Autodesk's developers, Doug Redmond.

http://justonesandzeros.typepad.com/

http://justonesandzeros.typepad.com/blog/2010/11/project-thunderdome.html

Wouldn't it be nice to push Vault settings out to all the Vault users? For example, you've learned how to create useful saved searches that can be powerful for you. Now you can distribute them out to all of your users.

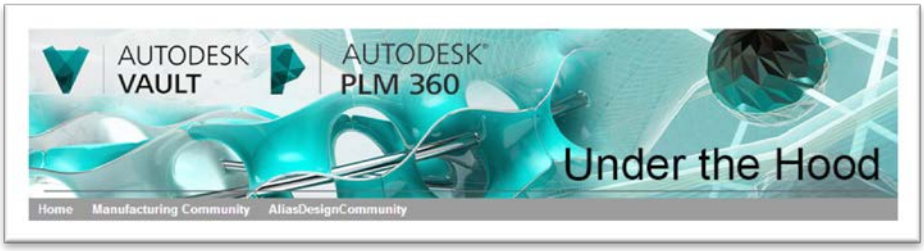
Section 4: Resources

This section highlights some very helpful resources that available online.

Under the Hood

This is a blog that is intended for Vault and PLM 360 users. It is managed and contributed to by Allan O'Leary, Brian Schanen, and Michelle Stone (Autodesk product experts). This site full of tips and tricks that you are sure to find useful!

http://underthehood-autodesk.typepad.com/blog/



Cracking the Vault

This is a blog that is intended for Vault users and is run by the Autodesk Vault Support Team. This is a great resource for problem solving.

http://crackingthevault.typepad.com



It's All Just Ones and Zeroes

This is a blog for Vault and PLM 360 API developers and is run by Doug Redmond (Autodesk developer). This is a great resource for all things related to the Vault API.

http://justonesandzeros.typepad.com/

http://www.youtube.com/user/ItsAllJust1sAnd0s



Discussion Forums

The Autodesk discussion forums provide a place for customers and industry partners to ask and answer questions. These forums are 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

Summary

Those are all features that you are likely not using, but need to be. Take what you have learned from this course to find ways that you can incorporate it into your Vault workflows. By doing so, you will find that managing your data is a lot easier than you thought.