Vault Office: Manage Your TPS Reports

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PL6282

Vault Office software is a new set of Vault software components tailored for users who don't work directly with CAD files. This class is designed to help you understand the features and functions of Vault Office software. Learn the when, what, who, and how of Vault Office software.

Learning Objectives

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

- Understand the ins and outs of Vault Office software

- Understand the types of users who find Vault Office software useful

- Understand how to use Vault Office software

- Understand where to get Vault Office software

About the Speaker

John Krause Jr. works as a Technical Marketing Manager for Autodesk, Inc., focusing on data management and the Manufacturing line of products. Prior to working for Autodesk, John worked as a Designer, CAD Manager, Consultant and Pre-sales Application Engineer at a variety of companies. With over 20 years of experience using Autodesk software, he is hoping to share his knowledge at Autodesk University as a speaker.

Introduction

The Vault Office Thick client is similar to the Vault thick client, but provides only non-CAD file and folder data management options.

Note: The Autodesk Vault Thick Client is available in the Autodesk Vault 2015 R2 subscription release.

The Vault Office thick client cannot be installed on the same machine as a full Vault Workgroup or Vault Professional thick client.

Who Should Use the Vault Office Thick Client?

The Vault Office thick client is ideal for users who do not need all of the CAD functionality of a full Vault client, but who still need to manage documents in a vault. For example, non-design engineers and project managers, employees on the shop floor, and sales personnel could all use the Vault Office thick client to fulfill these responsibilities:

- Review and validate design data
- Participate in the change process
- Manage project data
- Communicate with external team members
- Create reports
- Consume released design data
- Manage additional non-CAD data and custom objects.

Tasks Users Can Perform with the Vault Office Thick Client

File and Folder Tasks

- Create folders
- Move, Rename, and Delete non-CAD files
- Move, Rename, and Delete folders which do not contain CAD files
- Check in, check out, perform quick checkouts, and undo checkouts on non-CAD files
- Check in, check out, perform quick checkouts, and undo checkouts on folders
  Note: CAD files in the folder are not affected.

- Open CAD files as read-only
- Edit non-CAD file properties
- Edit folder properties
- Attach non-CAD files to CAD files
- Attach files to non-CAD files
- Detach files from non-CAD files
- Classify, categorize, change lifecycle definition, change state, and change revision on non-CAD files
- Classify, categorize, change lifecycle definition, and change state on folders
- Change state on CAD files

Custom Object Tasks

- Create Custom Object instances
- Classify, categorize, change lifecycle definition, change state, and change revision on custom objects
- Edit custom object properties

Job Processor Tasks

- Update view using Queue Update
- Send jobs to the Job Processor

Shortcuts and Links Tasks

- Create, edit, and delete links to folders and non-CAD files
- Create, modify, and delete links of non-CAD files and folders to custom objects

Item Tasks

- Read item details (Bill of Materials, etc.)
- Change state on items

Report Tasks

- Run reports on files, folders, items, and change orders
- Rerun reports on Bills of Materials (BOMs)
- Run reports on Custom Objects

Change Order Tasks

- Created, edit, and participate in Change Orders

General Tasks

- Go to working folder
- Access and create saved searches
- Enable custom utility for non-CAD files, folders, and custom objects

Data Standard Tasks

- Use Data Standard forms for non-CAD files and folders

Autodesk Vault Office provides Vault functionality for use within Microsoft Office applications to connect to a Vault server.

Vault Workgroup and Vault Professional users must have the Vault Office Server installed to perform read/write tasks with the thin client, including add files, check in files, and check out files. Without the Vault Office Server installed, users can only review data in the Vault with the thin client.

Autodesk Vault Office also provides a Vault Office thick client for non-CAD documents users.

Note: The Vault Office thick client is available only in Autodesk Vault 2015 R2.

Vault Office 2015 and Vault Office 2015 R2 Requirements

Browsers

- Internet Explorer® 9, 10, 11
- Mozilla Firefox® 25
- Google® Chrome™ 31

Supported Microsoft Office Products

- Office 2010 (SP1) and 2013 (32-bit or 64-bit)

Installation Overview

Autodesk Vault Office is part of the main Vault Server and Client installations.

There are three major parts to the Vault Office installation process. Be sure to follow the instructions in each section to ensure a successful Vault Office installation.

- Part 1:Preparing for Your Vault Office Installation
  The instructions in this section help you prepare for your Vault Office and Vault add-ins installation.

- Part 2: Install Vault Office and Vault Add-ins
  Follow the steps in this section to install the Vault Office Server, the Vault Office thick client, and the Microsoft Office and Microsoft Outlook Vault Add-ins.

- Part 3: Post-Installation Steps for Vault Add-ins
  If you install the Microsoft Office or Microsoft Outlook Vault Add-in, you must complete the tasks in this section after the installation.