



Beyond Engineering to Sales

Purchasing and Management with Vault Office

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Class summary

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.

Key learning objectives

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

- 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

Let's Start!

Overview

- More Than CAD
- Ways to Access Data in Vault
- Case Study: A Typical Workflow with Autodesk Vault Office
- Question & Answers

More Than CAD

More Than CAD

eMail correspondence

Inventor

AutoCAD Mechanical

Word

Change Order

Items

Navisworks

PDF

Visualization Files

Publisher

Bill Of Materials

Workflows & Processes

Factory Design

Excel Calculations



Beyond Engineering



Sales

- View released designs
- Manage quotes & bids
- Review & approve ECOs



Program & Project Managers

- Approve design release
- Review and approve ECOs
- Review project status



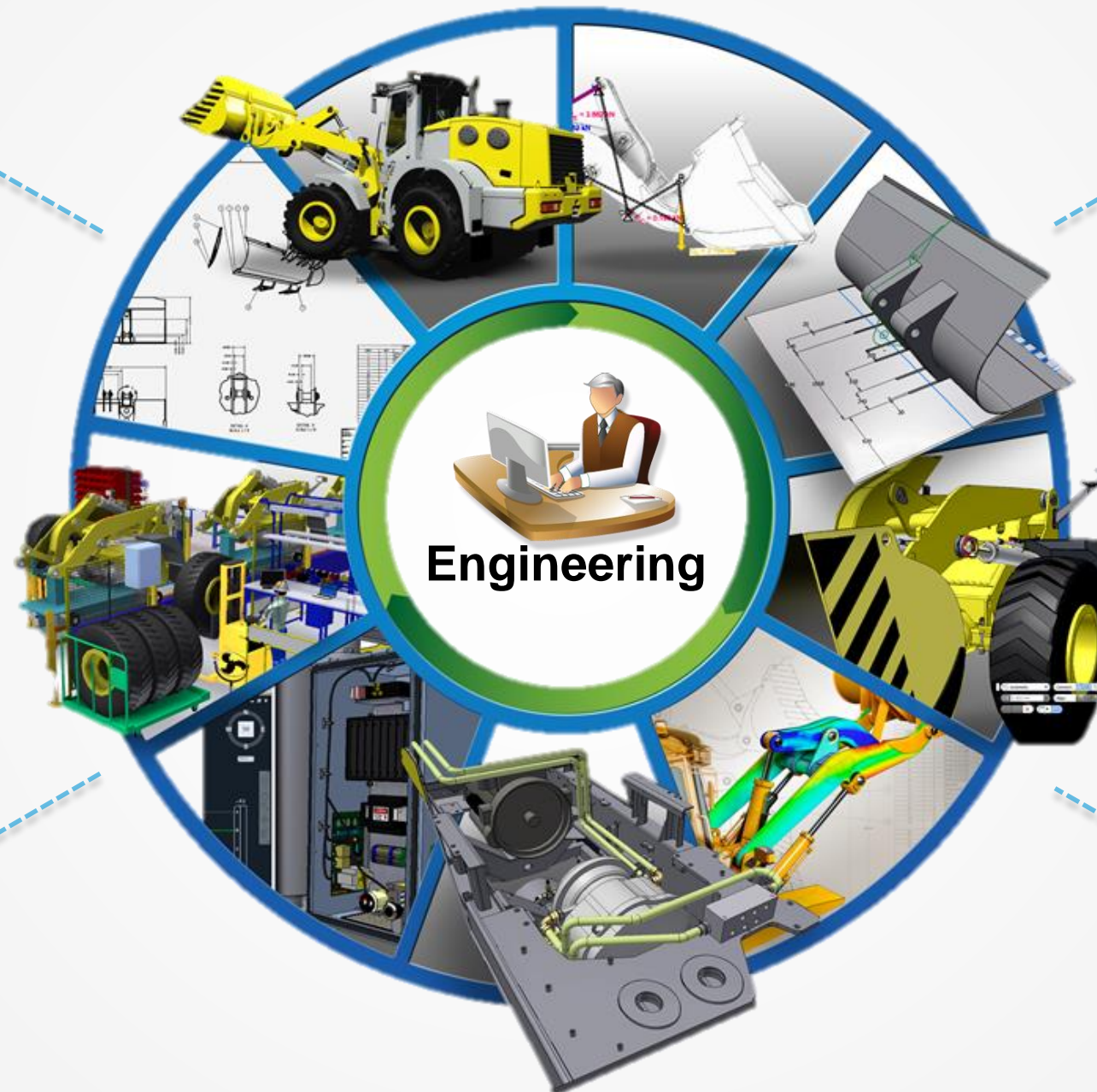
Technical Publications

- Manage documentation
- Access & view designs



Manufacturing & Production Planning

- View & print design data
- Initiate & participate in ECOs
- Access BOM information

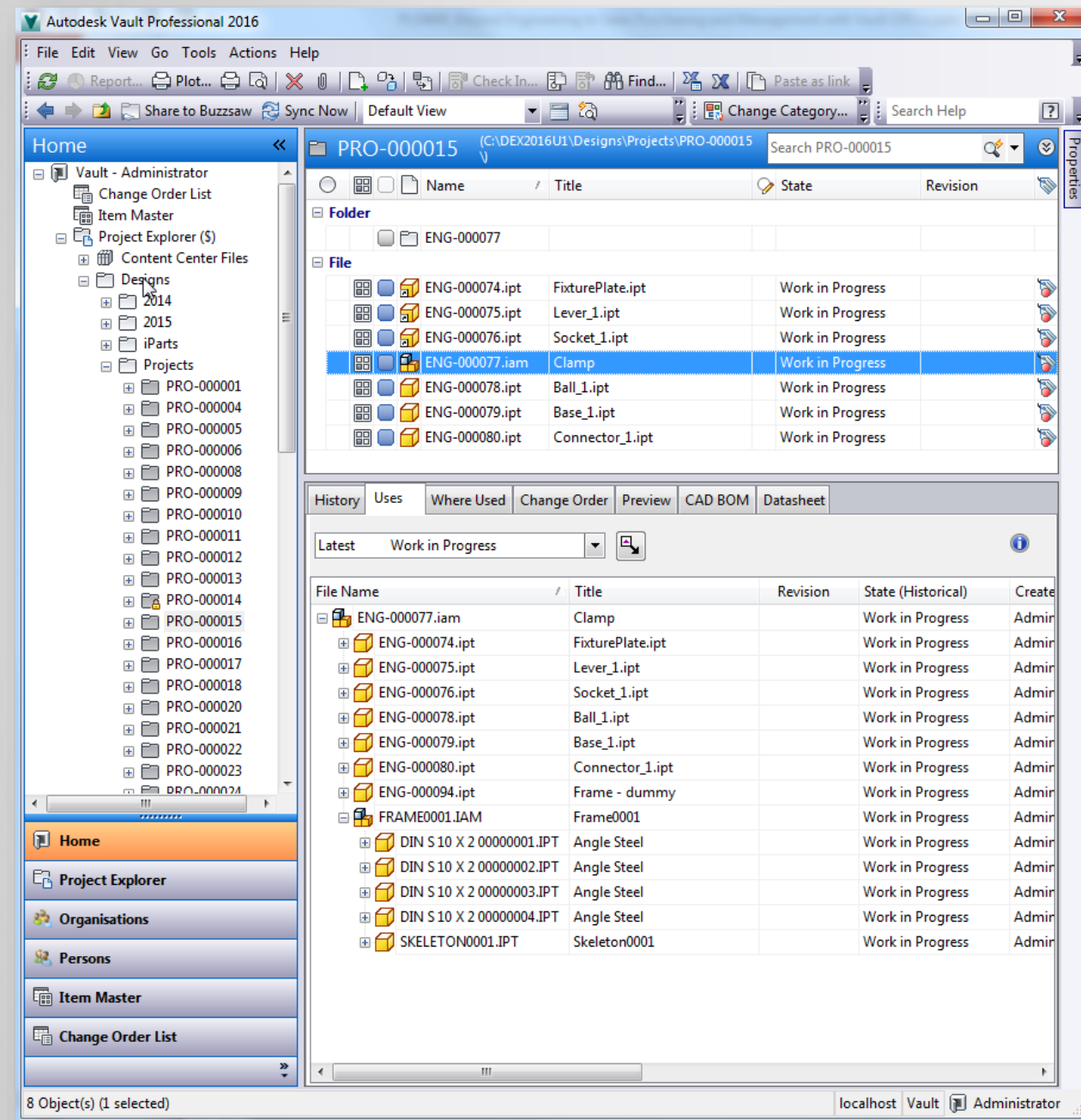


Ways to Access Data in Vault

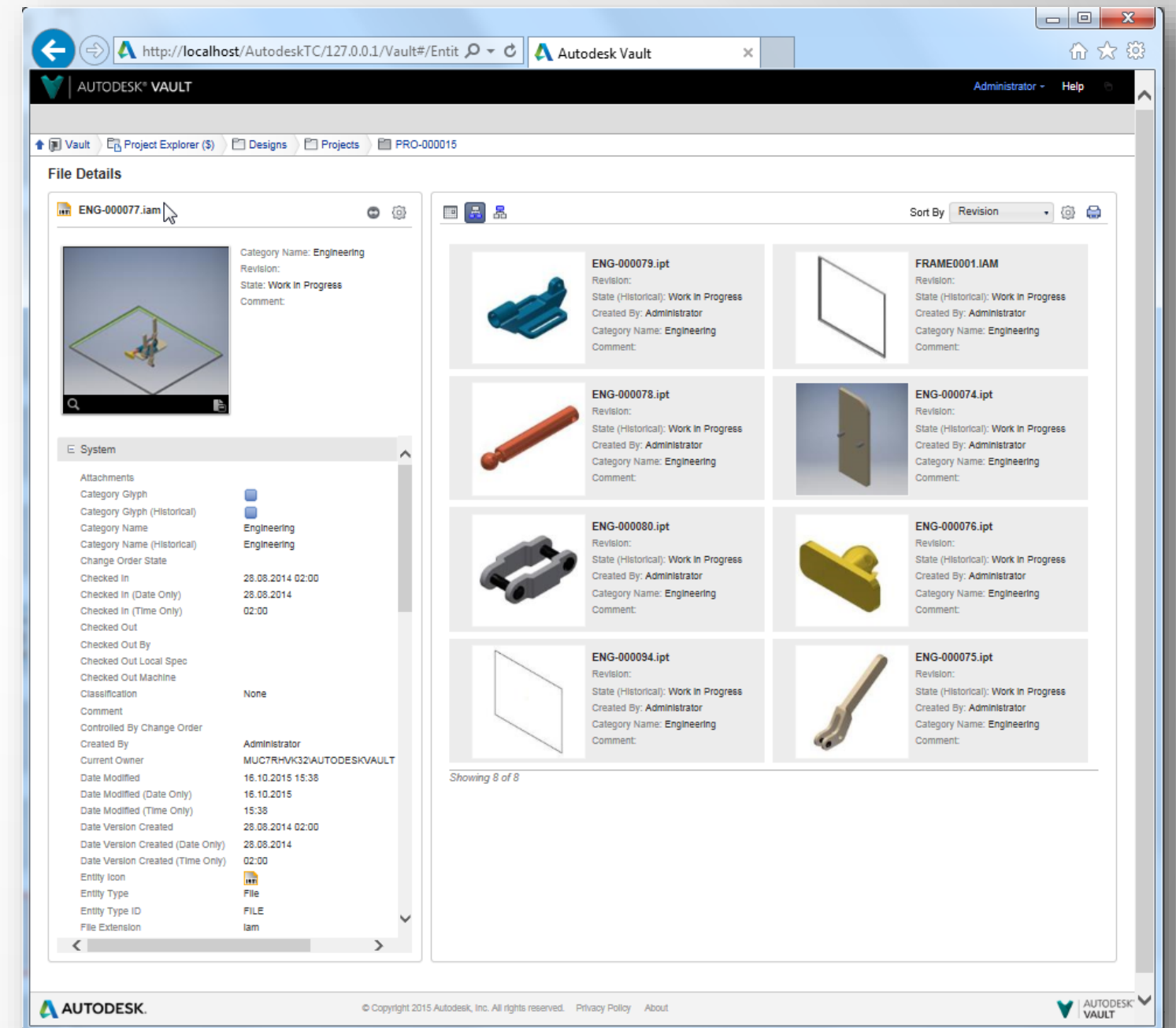
Thin Client, Web Client, Thick Client, Office Client



The Client Technology



„Thick Client“



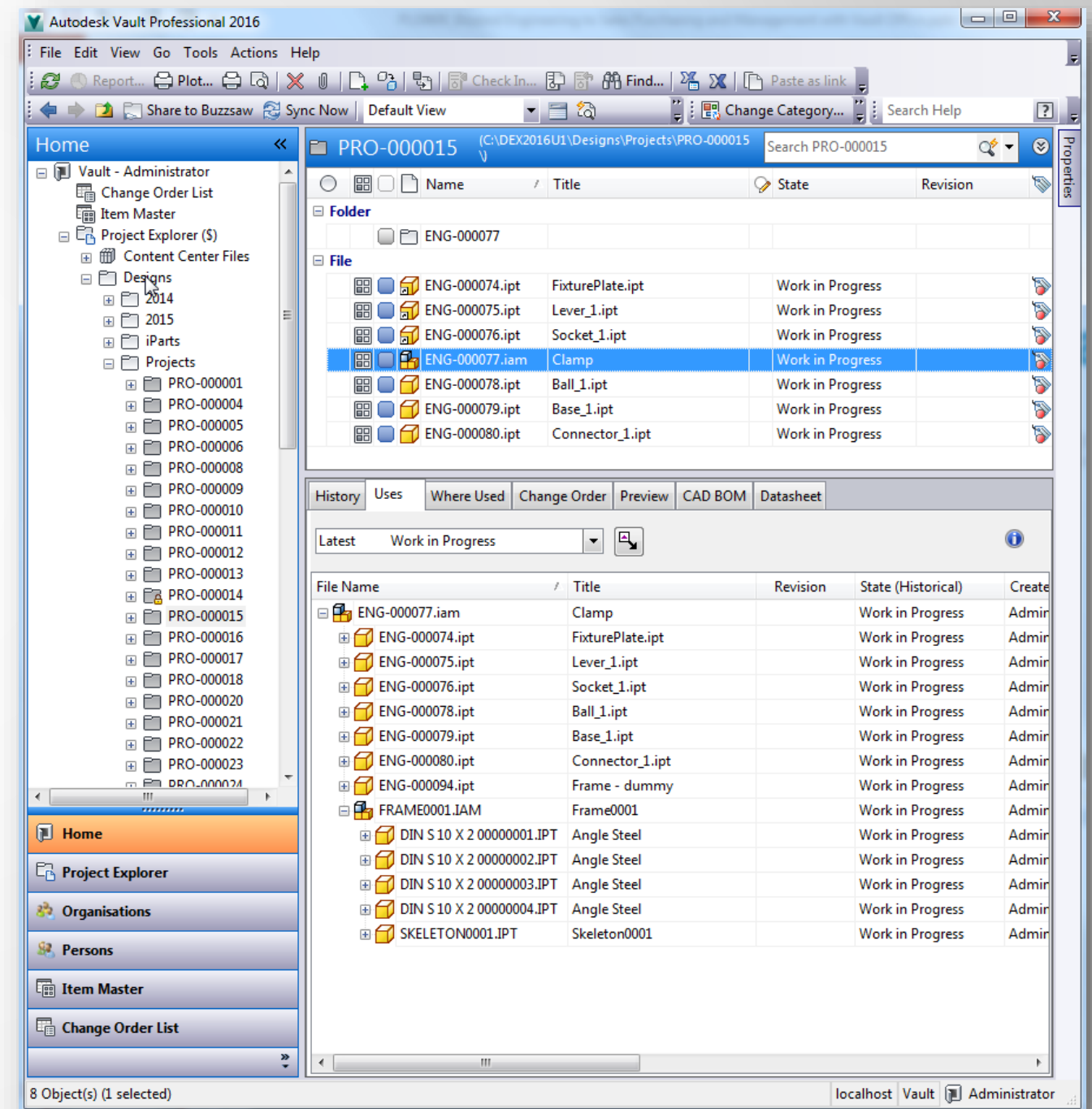
„Thin Client“ = “Web Client”

License Types

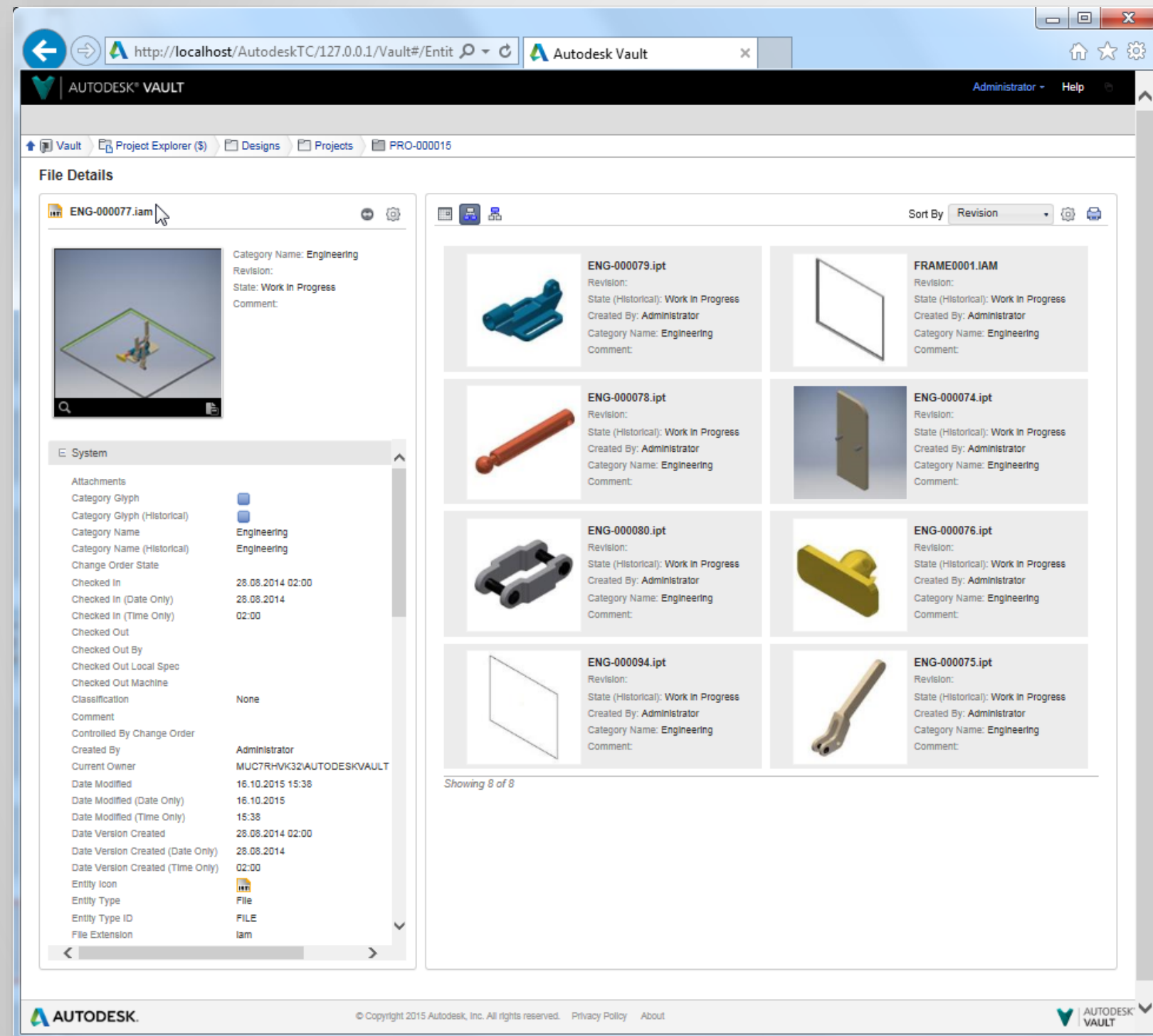
- Vault Workgroup (86564VLTWG_2016_0F)
- Vault Professional (86563VLTM_2016_0F)
- Vault Office (86562PCOFFI_2016_0F)

Good to Know:

- *Vault Office* can connect to Vault Professional **AND** Vault Workgroup!
- *Vault Office* works on Thin **AND** Thick Client!
- Vault Add-in for MS Office **MUST** be installed from Vault Office Media!



Capabilities of the Thin Client - Read Only* Access



Included in Vault Professional

No Client Installation

Installation @ Vault Server

Admin settings to restrict view

Settings to restrict access

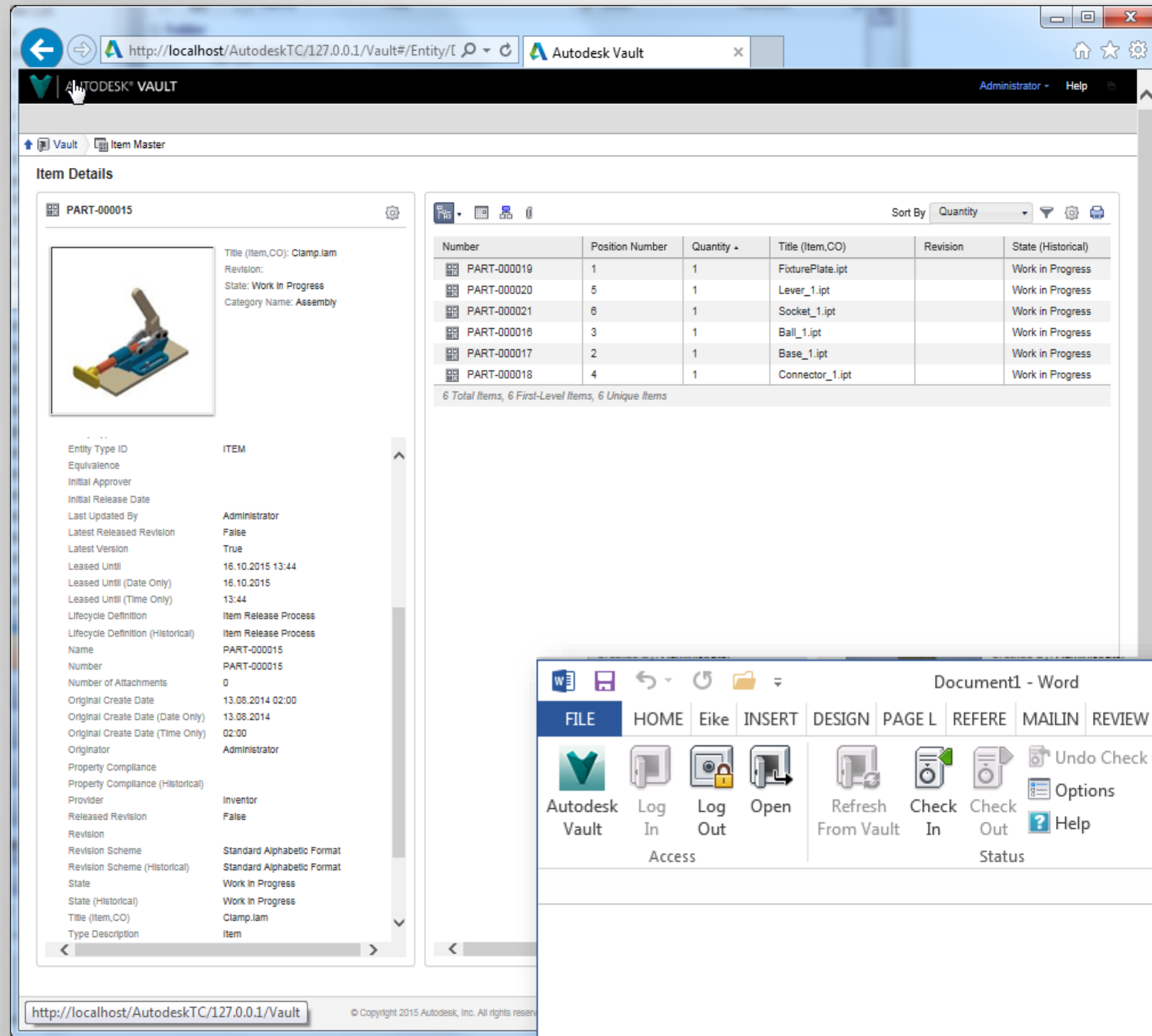
Download of files

DWFx preview**

*Requires no Vault license – may require a SQL license

** Requires IE & local DWF installation for 3D viewing

Capabilities of the Thin Client – Read/Write Access



Vault **Office Licenses** required

Installation of MS Office Integration on workstation

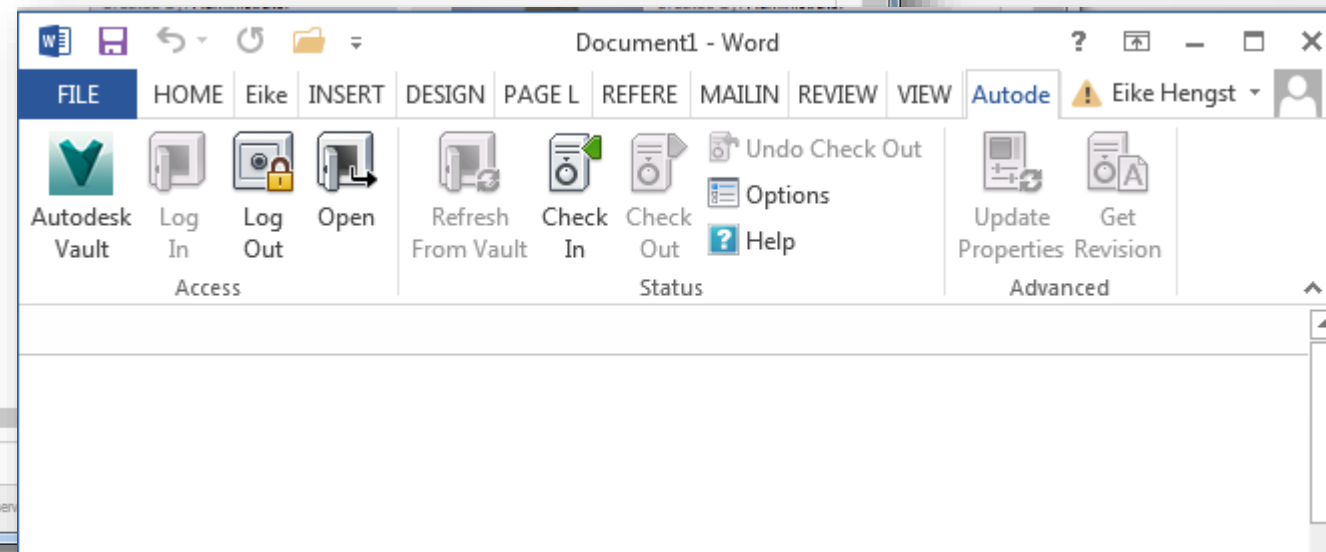
Create & Modify MS Office documents

Add eMails incl. attachments out of Outlook to Vault

Add files

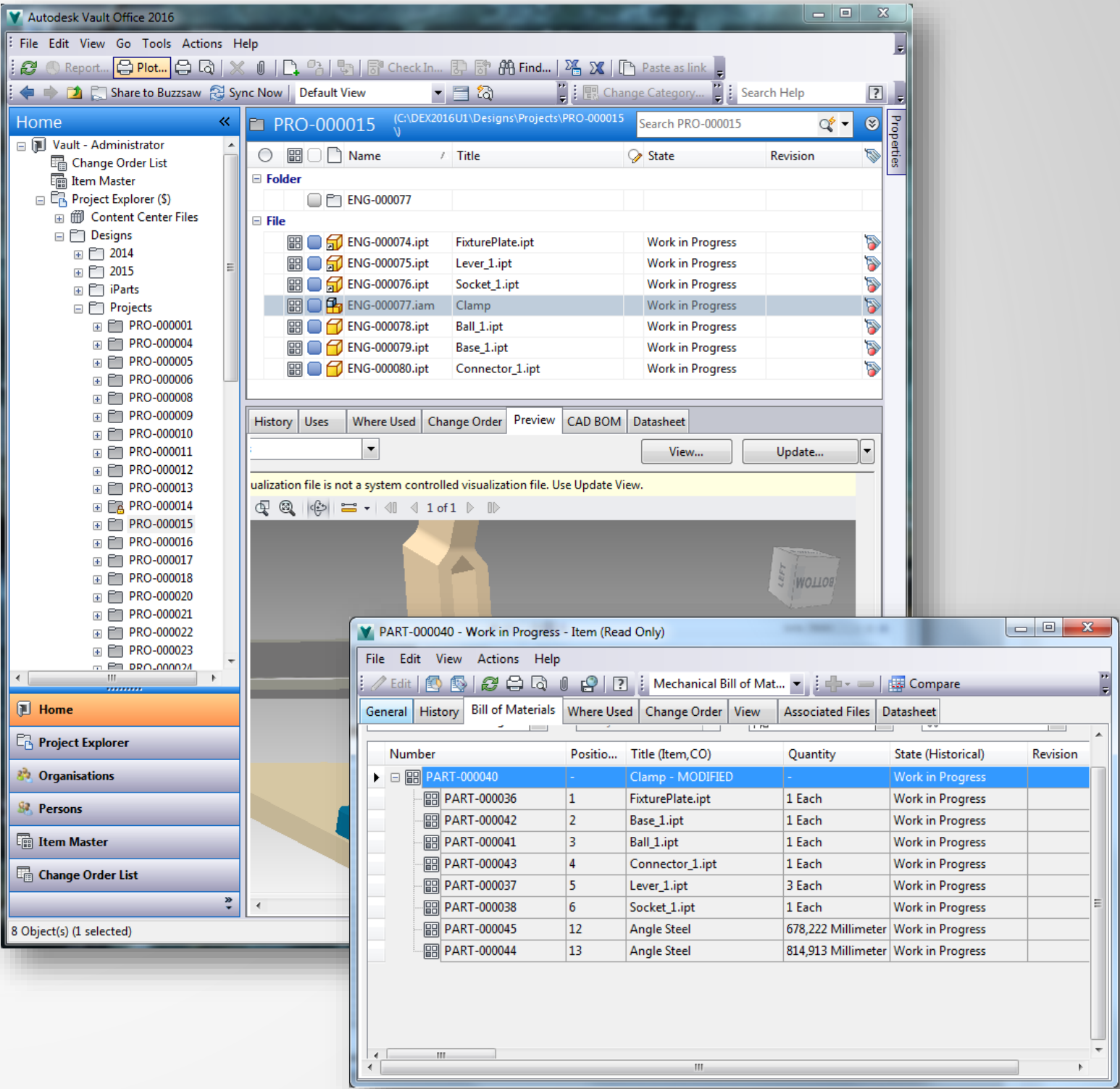
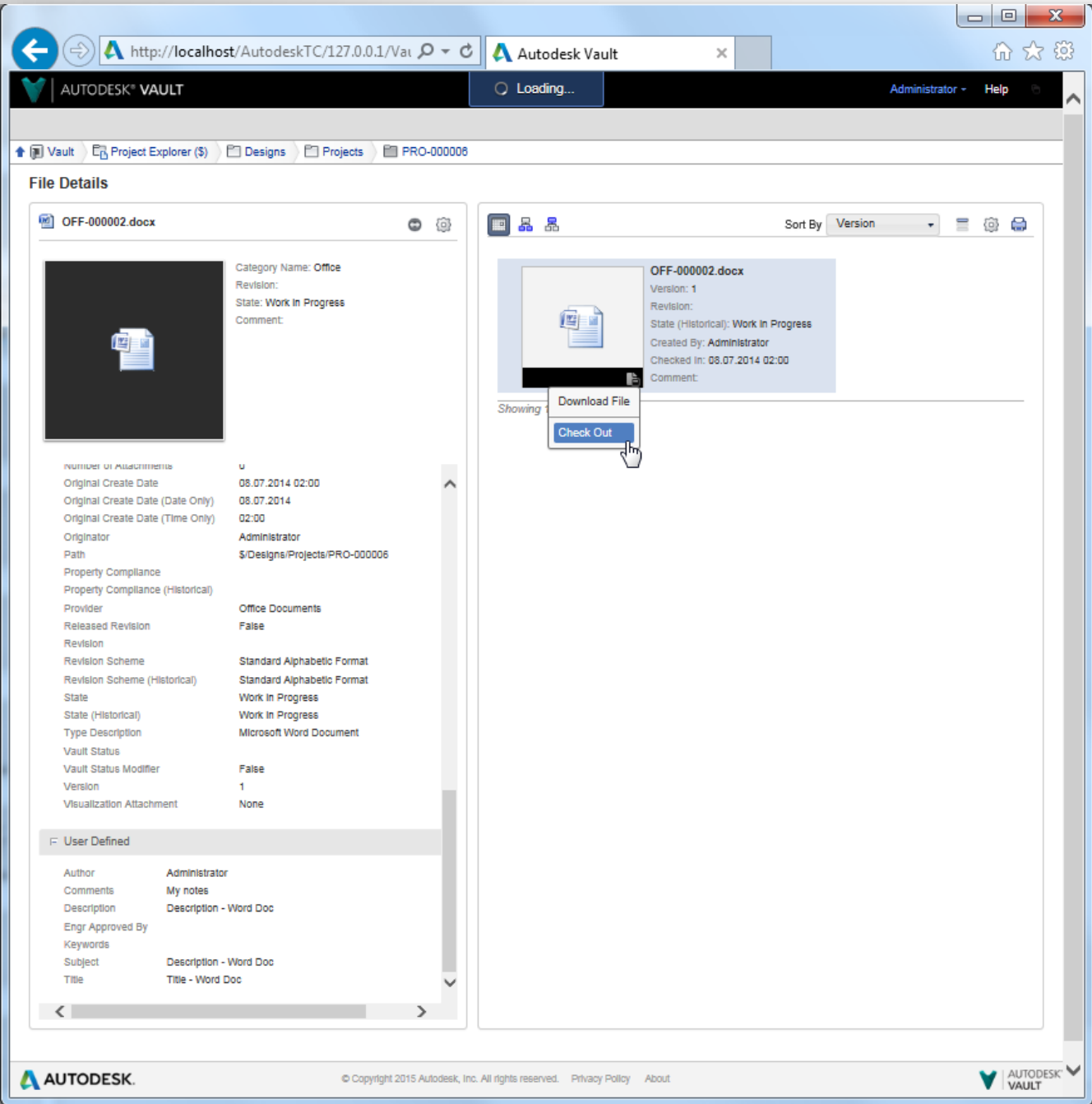
Check Out/In files* via Web Client

* No CAD structures are recognized on check out / in
** Requires IE & local DWF installation for 3D viewing



Let's See How It Works!

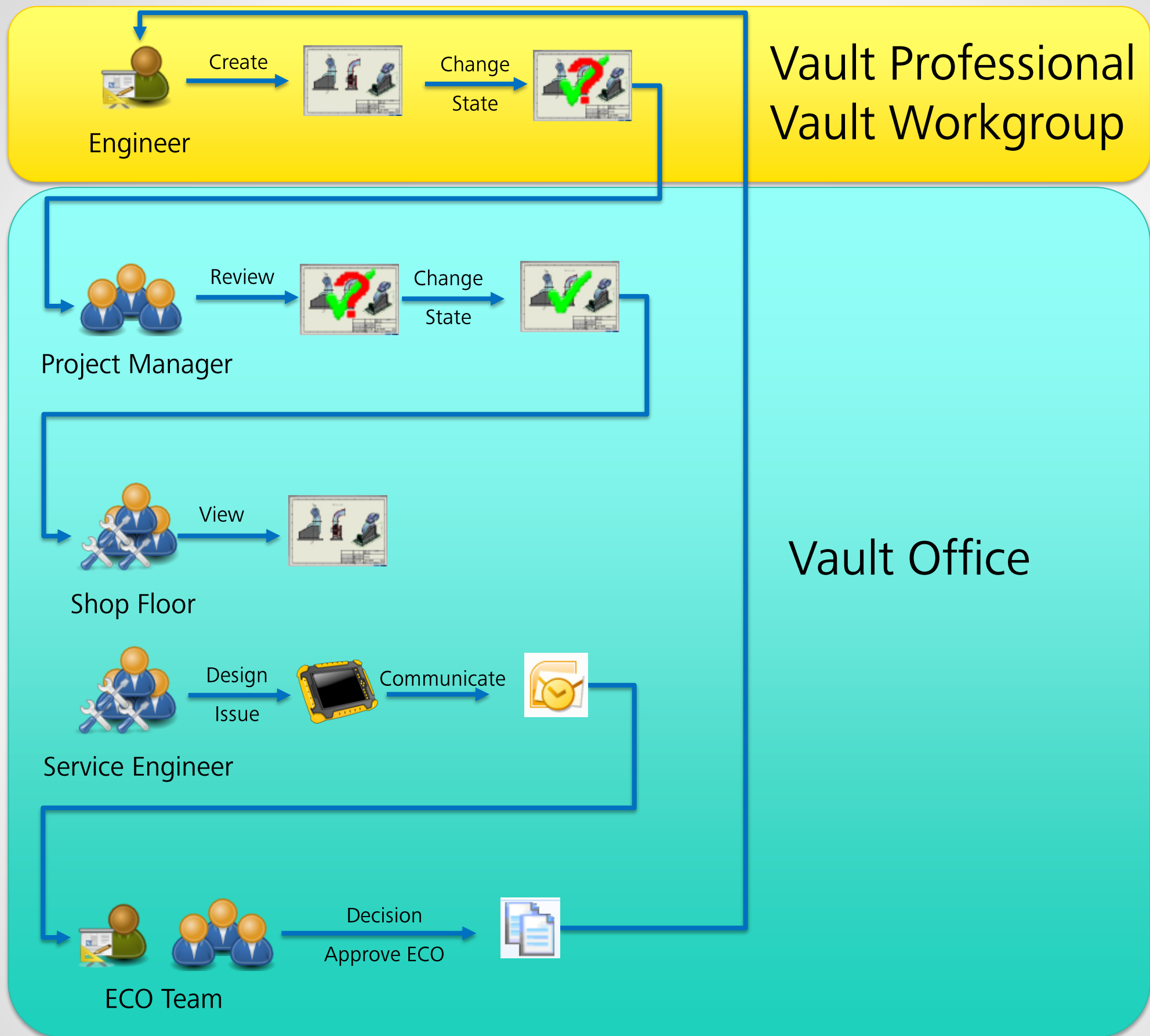
Vault Office Comparison



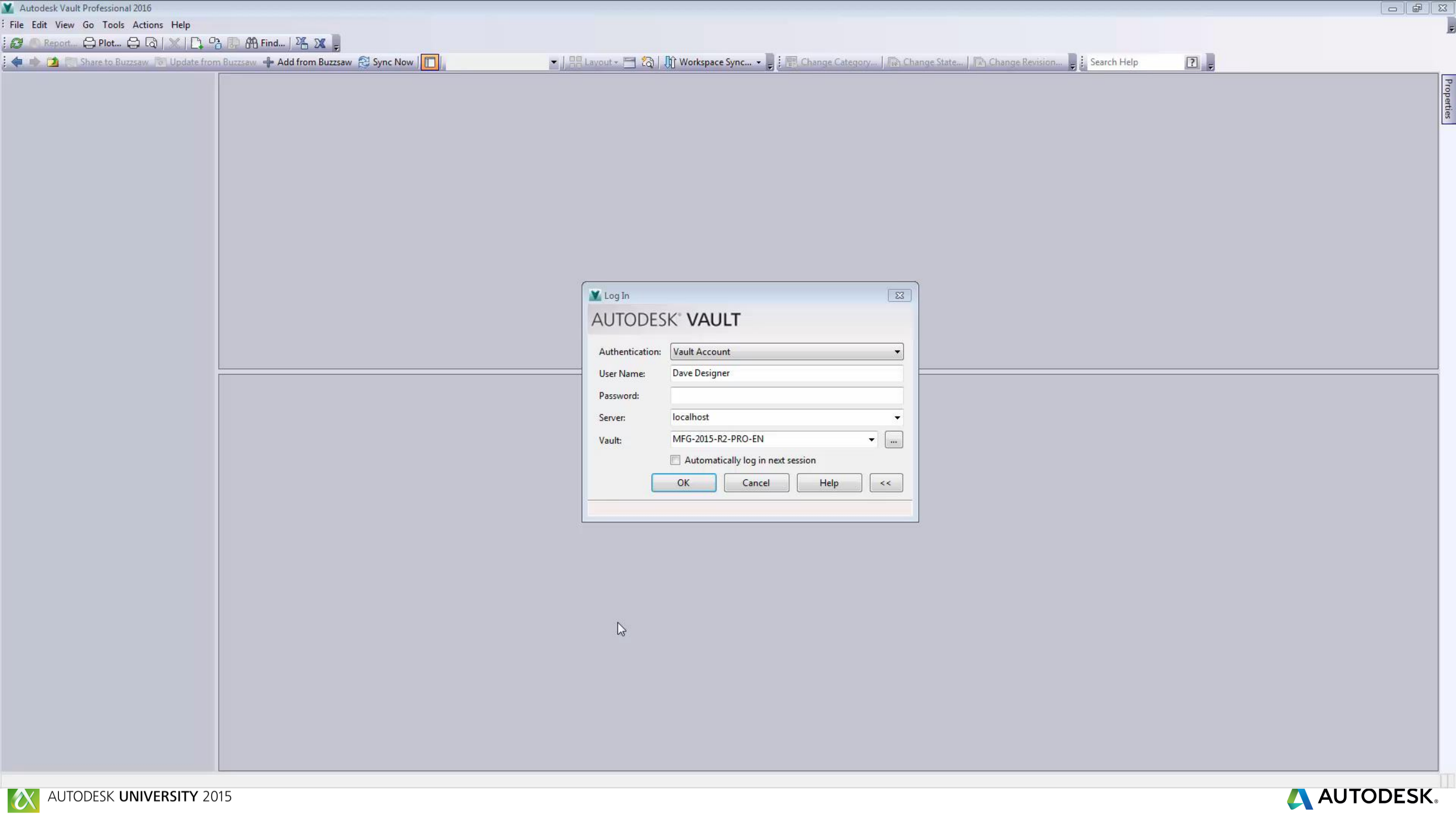
Vault Office Comparison

Vault Office capabilities	Thin Client – Vault Professional	Thin Client – Vault Office	Thick Client – Vault Office
Log in to Vault - access type	read	read/write	read/write
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		✓	✓
Search & filter capabilities	quick & advanced	quick & advanced	Full search & filter capabilities
View items & BOMs incl. structure like BOM, where used, attachments, history	✓	✓	✓
Additional Information like ECO, custom tabs			✓
Generate reports for items & BOM			✓
View relationship of CAD files (uses, where used)	✓	✓	✓
Additional Information like History, ECO and Review tab			✓
Generate reports for files & folders			✓
View CAD data with Design Review (needs to be available on that computer)	✓	✓	✓
Browse through folders	✓	✓	✓
View folder information	✓	✓	✓
Customizable (API, Powershell)			✓
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			✓

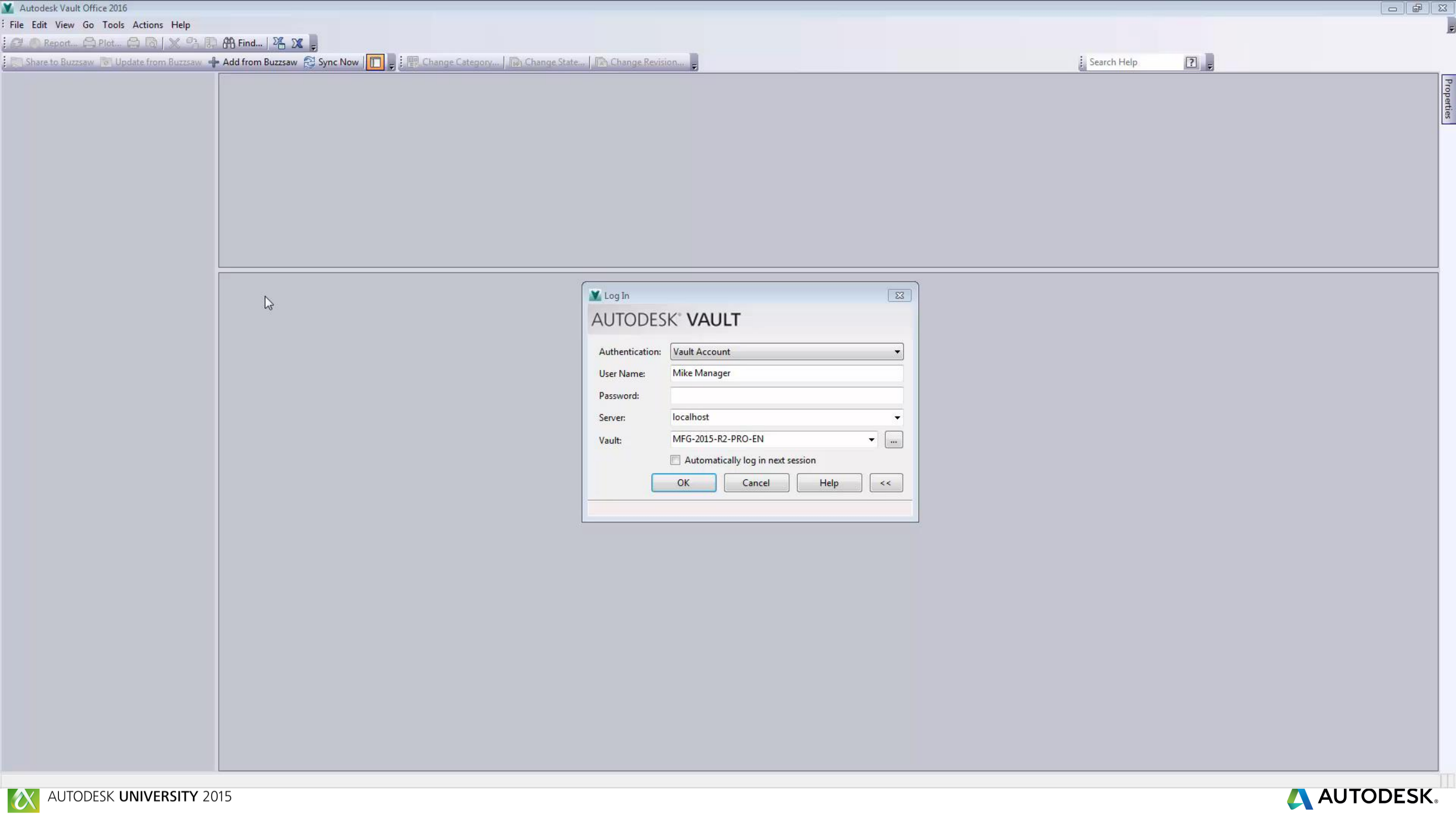
Case Study: A Typical Workflow with Autodesk Vault Office



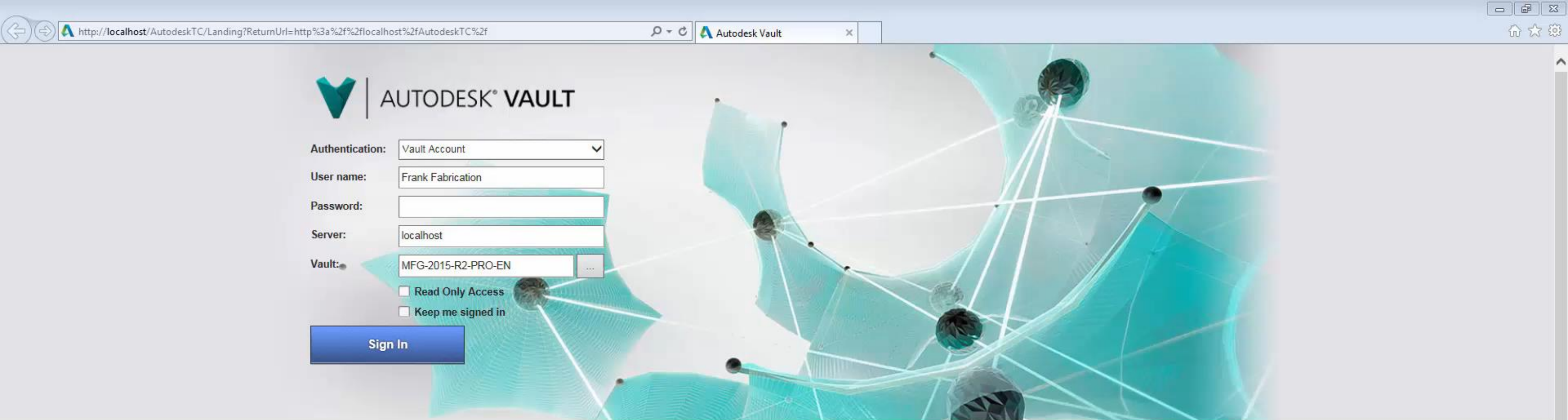
The Design Engineer



The Project Manager



On The Shop Floor...



Learning Resources

[Vault Online Help](#)

Need help with Autodesk Vault? Start here.

[Downloadable Help](#)

If you don't always have access to the Internet, you can download the help.

[Knowledge Base](#)

Can't find what you need in the help? These articles and white papers can help.

[Autodesk YouTube Channel](#)

Instructional videos lead you through the essential skills for using Autodesk Vault.

Community

[Autodesk Vault Idea Exchange](#)

Share your wish list directly with the Autodesk Vault Development Team.

[Discussion Group](#)

Ask questions and share information about Autodesk products with customers and industry partners.

[Under the Hood](#)

Learn about Vault features and tips and tricks from the articles and videos on Brian Schanen's blog.

[Cracking the Vault](#)

Find out how to keep your Vault running smoothly from Richard Rankin and the Vault Support team.

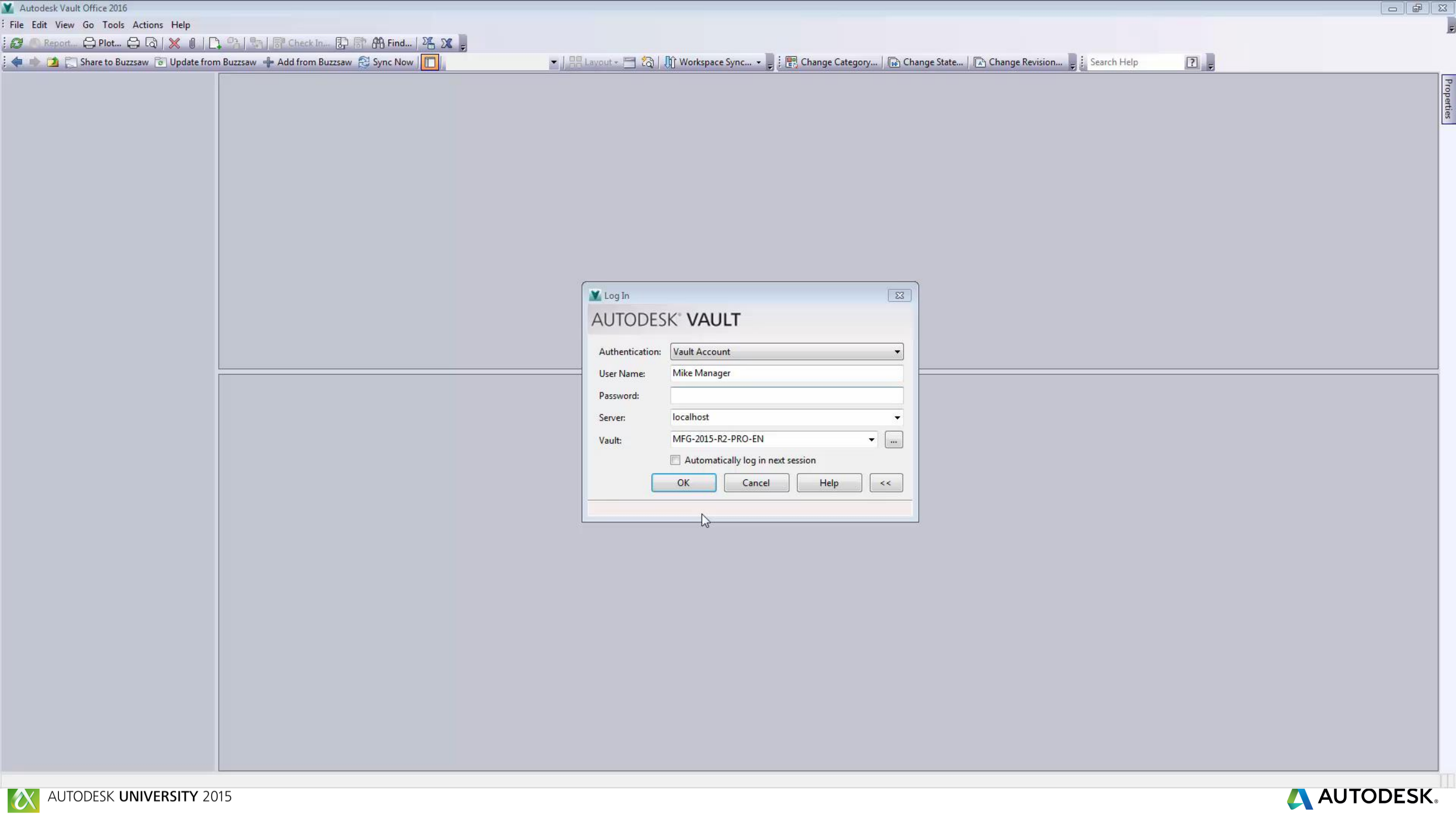
[It's all Just Ones and Zeros](#)

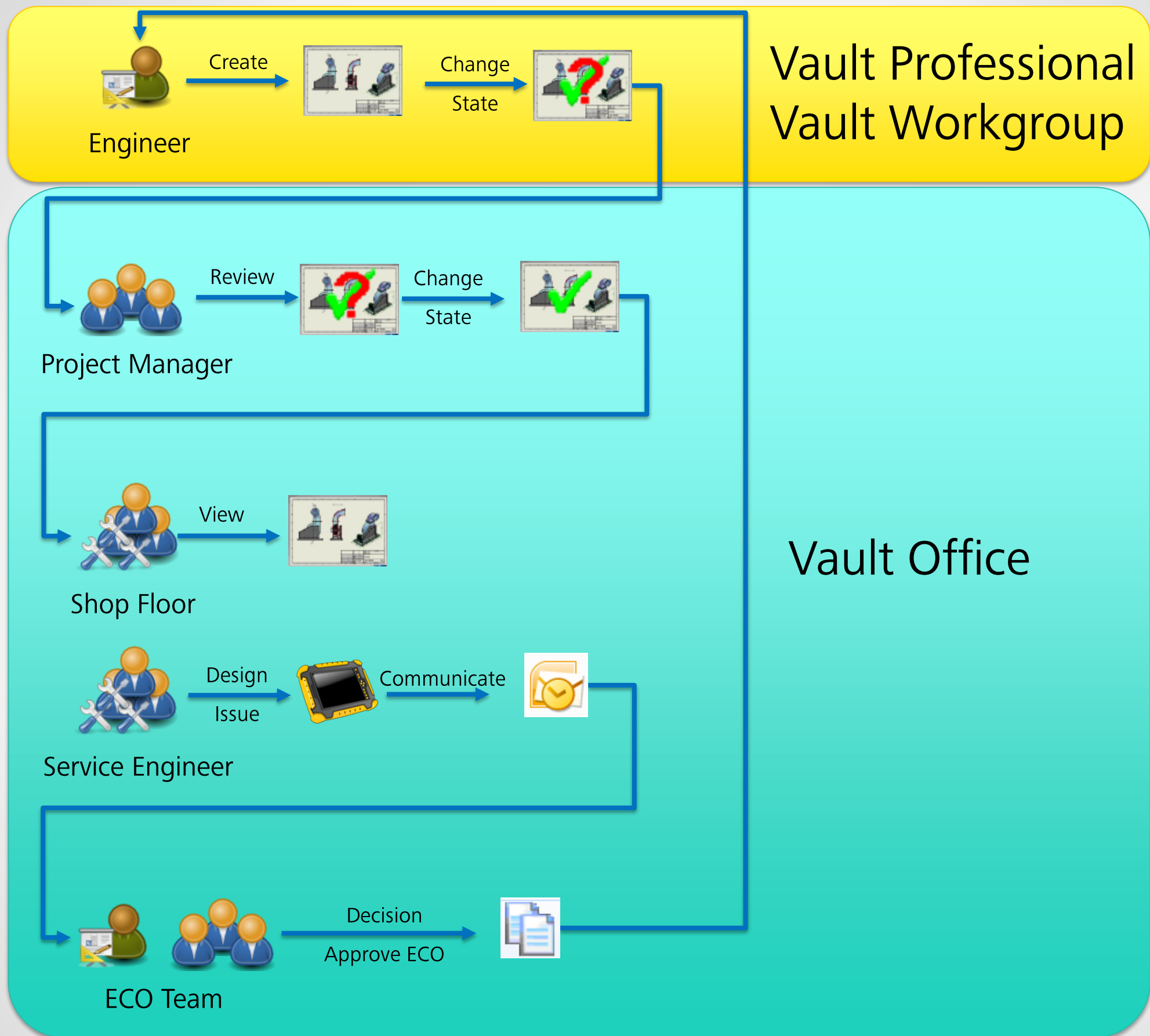
Learn how to customize Vault with Vault developer Doug Redmond.

The Service Engineer



The ECO Team





Summary

- Share and enrich data & information across the company
- Use the technology which fits best
- Easy to access
- Vault Office supports several business processes



Questions?

