Implementing Vault in an Infrastructure Engineering Company: Actual Experience.

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Class summary - CI1889-R

The lecture will give know-how on the implementation of Vault in an infrastructure engineering company. We will provide information on all stages of implementation: choosing best DMS; analysis; implementation planning and strategy; installation; system configuration and adaptation to company needs. Results of DMS system analyses and pilot projects will be discussed, and we will provide arguments for choosing Vault over Bentley PW or any other DMS system. Best practice of Vault for managing infrastructure projects and business processes will be shared. We will also share experience on Vault integration into AutoCAD Civil 3D, AutoCAD, AutoCAD Map, AutoCAD LT, Ms Office, and Bentley Microstation. You will learn how to configure and maximize the efficiency of the link between Vault and a Buzzsaw server.

Key learning objectives

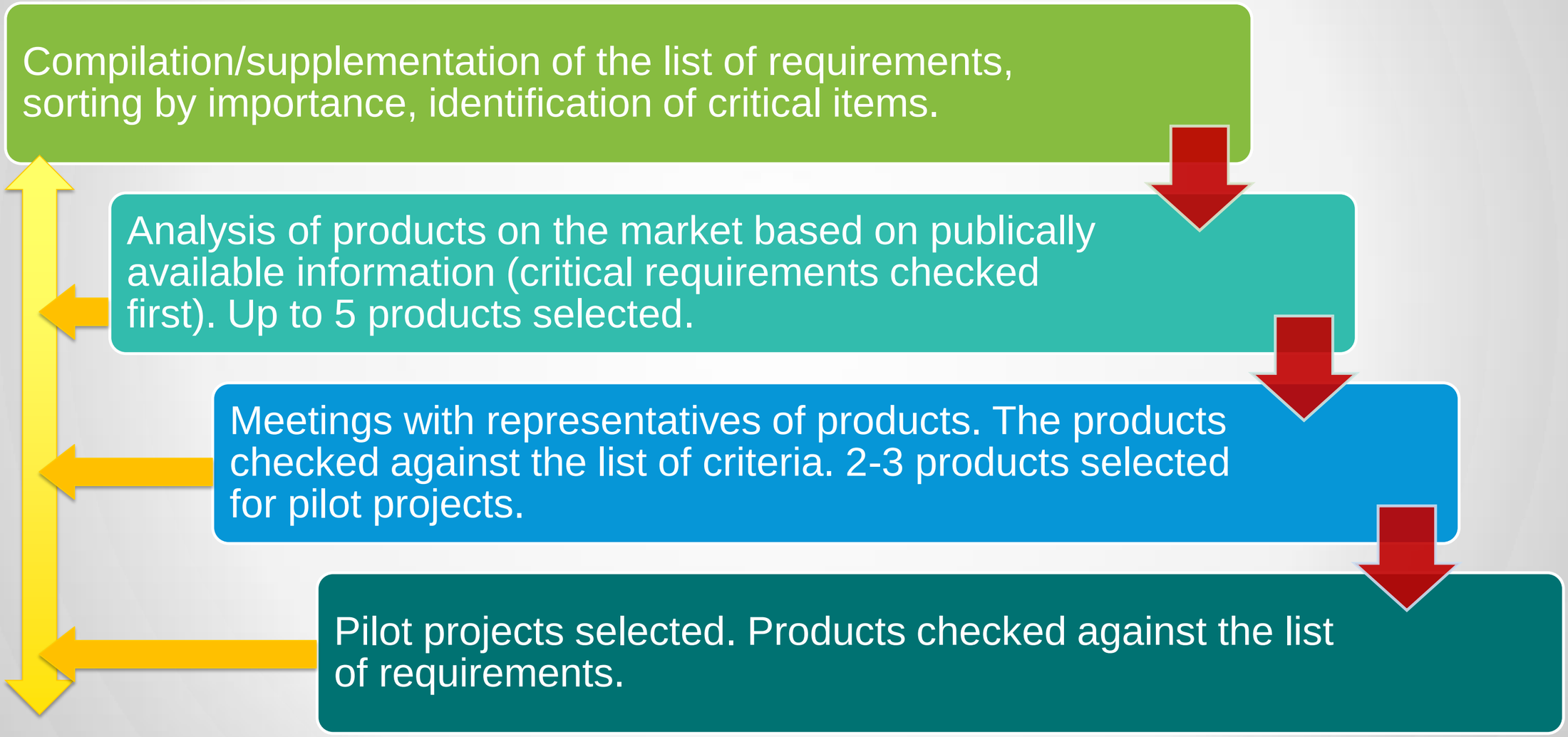
At the end of this class, you will be able to:

- Choose the best DMS for their needs;
- Avoid and/or solve potential problems when implementing Vault in an AEC company;
- Work with Vault integration into AutoCAD Civil 3D and Bentley Microstation;
- Maximize the efficiency of the Vault integration into a Buzzsaw server.

Agenda

- Topic 1, choosing DMS system strategy, analysis results.
- Topic 2, implementation, planning strategy (installation, system configuration and adaptation).
- Topic 3, managing business process, custom applications.
- Topic 4, managing infrastructure projects, work with AutoCAD Civil 3D and Bentley Microstation.
- Topic 5, maximize the efficiency of the Vault integration into a Buzzsaw server.

Topic 1, choosing DMS system strategy, analysis results.



Topic 1, choosing DMS system strategy, analysis results.

	PW	Vault	Comments
Licencing model, prices.	Separate licences for servers and user access.	1 general licence, single price. 1 Vault license ≈ 5 PW.	Detailed calculations necessary for price comparison.
Integration with other applications	Integration to MS Office, Esri, Bentley and Autodesk (except LT), C3D Data shortcut support since 2012.11.26 (2012/13) only.	Integration to MS Office, Bentley (Microstation only), Autodesk (AutoCAD LT on the list).	PW integrates to more products, however it is slower with updates and support or new technologies. Vault has advantage with Autodesk products.
Implemen-tation of product structure	Attachment of attributes only possible to project folder or file. Files are stored inside an encrypted structure.	Attachment of attributes by category to projects, catalogues, files.	Vault has more flexible and comfortable possibilities of implementation of the structure: use of additional tools enables fast and comfortable development of a project.
Business documents, Lifecycle	Has only linear lifecycle. Virtually unsuitable for business documents.	Supports not only linear lifecycle, but additional criteria, events, etc. can also be added.	Vault has a far better and flexible lifecycle engine, which allows implementation of most processes.

Topic 1, choosing DMS system strategy, analysis results.

- What DMS selection strategy suited you best?
- How many people took part in the workgroup in your company when selecting DMS?
- Vault vs. PW, what advantages of Vault would you stress?

Topic 2, implementation, planning strategy (installation, system configuration and adaptation).

1

- Installation, configuration of Vault server part.
- Inspection of the configured system against the list of success criteria.

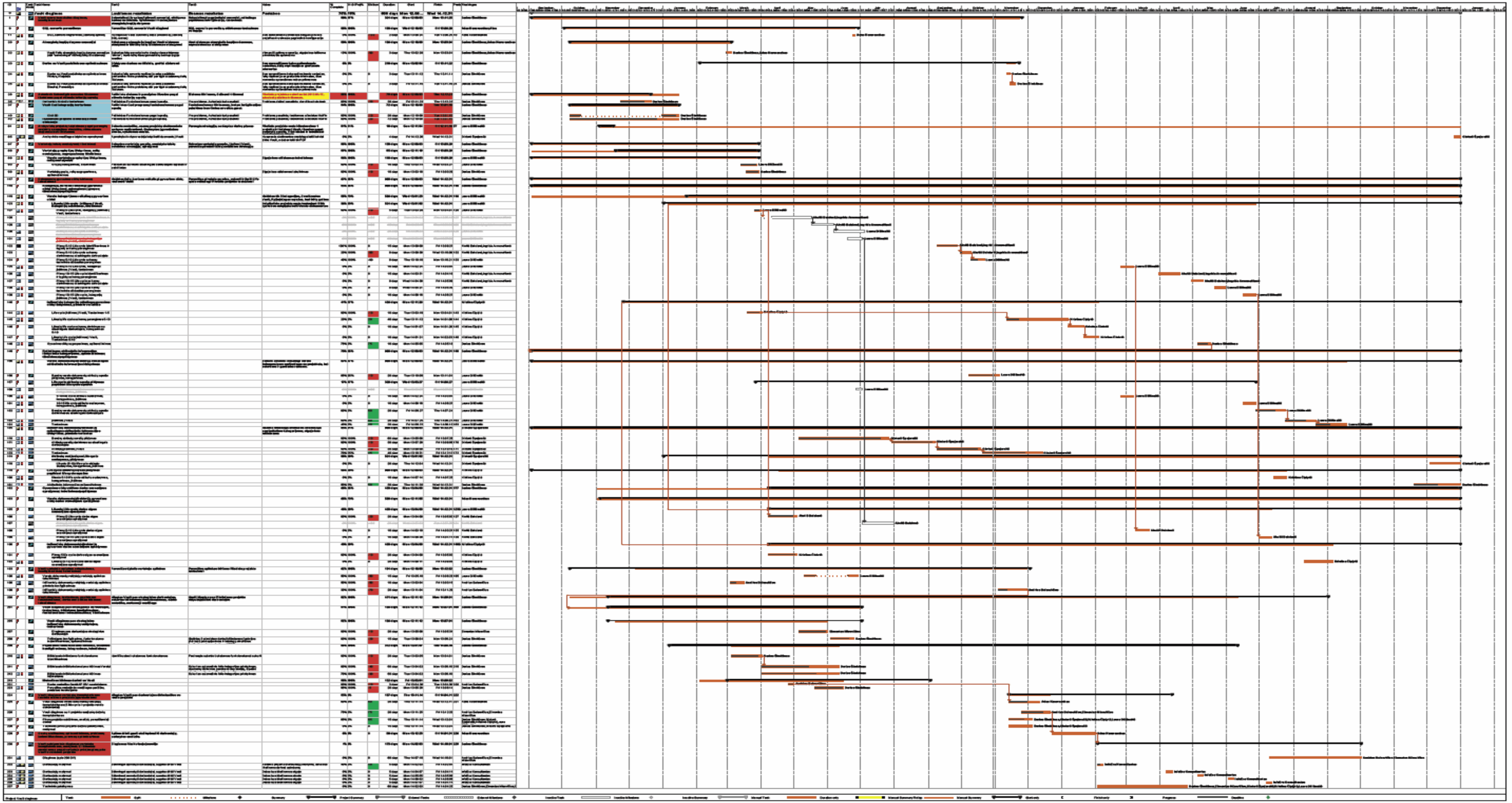
2

- Creation of folder structure (identification of categories, attributes).
- Strategy for setting user rights.
- Creation of lifecycle of documents, supplementation of attributes.
- Installation of Vault, testing inside a workgroup, development of additional functionality, work methodology, training material and necessary documentation.

3

- Installation of Vault on user computers for implementation of a real test project.
- Summarisation of feedback, identification of problems, optimisation of processes.
- Gradual installation of Vault on user computers, training. Progress determined by user connection to the project managed in Vault.

** 237 items on the installation plan overall...*



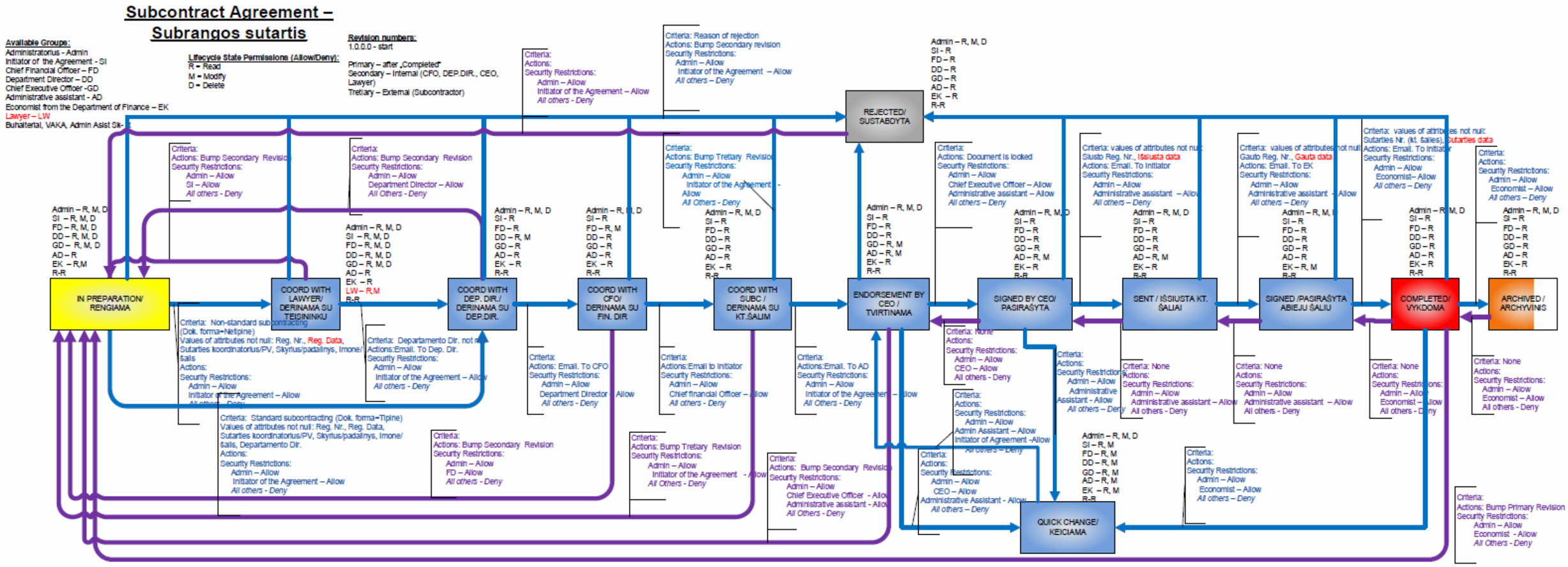
Topic 2, implementation, planning strategy (installation, system configuration and adaptation).

- When is it possible to run the system with a real project?
- How was/will the running of the initial project (be) carried out in your company?
- How much time is needed for implementation of DMS?

Topic 3, managing business process, custom applications.

1. Vault has an excellent Lifecycle tool with broad possibilities of use. It allows implementation of the most complex business processes.
2. Job server and additional sub-applications expand the broad possibilities even more, and we draw the limit of possibilities ourselves.
3. When using a Job server emails are sent to relevant people when transitioning from one stage to the next, and data from external data bases can be reached in the created Tabs (client list (ODBC), ERP information, SharePoint, etc.).
4. A search system and reports allow following the progress of the process and receiving detailed reports.

Topic 3, managing business process, custom applications.



Topic 3, managing business process, custom applications.

- What is your opinion on the prospect of using Vault for managing business documents and what experience could you share in relation to this?
- What additional functionality do you use?
- What is your strategy regarding this issue?

Topic 4, managing infrastructure projects, work with AutoCAD Civil 3D and Bentley Microstation.

1. We developed a structure template for Vault using LST (GOST, Eurocodes, AASHTO). Each project part was assigned a category, attributes, lifecycle and default user permissions.

2. When starting a new project, using additional functionality, the necessary project parts are cloned with all settings. Attributes are filled automatically, individual access permission of the project are added.

3. Data Shortcuts integration is used in Civil 3D projects, Bentley add-in is used for management of *.dgn files.

Topic 4, managing infrastructure projects, work with AutoCAD Civil 3D and Bentley Microstation.

- How long does it take to create a new project for you?
- What functions do you use in AutoCAD Civil 3D, what experience you can share?
- What functionality of Bentley Misrostation Add-in do you use and what are your experiences in working with the *.dgn files?

Topic 5, maximize the efficiency of the Vault integration into a Buzzsaw server.

1. Buzzsaw server is used for data exchange with partners or customers, for small or developing offices.
2. The entire root $ folder is synchronised, yet a separate user is used for data exchange (Vault-Buzzsaw-Vault) with access only to those files and folders, which are to be synchronised.
3. When using the lifecycle functionality, files are automatically published to Buzzsaw.
4. Buzzsaw server helps our business, that is a clear answer for our partners to the question – How are we going to work together on a common project?

Topic 5, maximize the efficiency of the Vault integration into a Buzzsaw server.

- What cases of use of Buzzsaw server would you identify?

- How do you synchronise data, what strategy do you use?