Evolve with Vault: What's New in Vault 2015 and Vault 2015 R2

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Assumptions

- Familiarity with Vault
 - Especially previous releases
- PL7016 An Introduction To Vault
 - Breakers B, Level 2
 - Taught by Adam Luttenbacher
- Please hold questions until end



Your Instructors



Jeffrey Maisano

- Sr. Principal Engineer
- 14 years at Autodesk in the Data Management group
- Developer on Vault Explorer client applications
- Previously worked on the new Vault thin client, the Inventor Vault add-in, and Autodesk Streamline.



Anil Chintamaneni

- Senior User Experience Designer
- Works in the Data Management group mainly on the Vault software product line
- 9 years at Autodesk
- Worked as a Product Data Collaboration Engineer at Ford Motor Company
- Holds a Master's degree in Mechanical Engineering.



Introduction

Vault has undergone a massive overhaul in the recently released Vault Professional 2015 and Vault Professional 2015 R2, especially in the areas of Items and bill of materials (BOM). This class will give you an overview of some of the major Item and BOM enhancements in Vault 2015 including support for long-lead Item workflows and enhancements in Vault 2015 R2 including multiple BOM rows, BOM properties, BOM reports, Copy Design, and Vault Office.



Handout

- Covers everything discussed in this presentation
- More material
- ePub format available



Key learning objectives

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

- Learn about Item and BOM enhancements in Vault 2015.
- Learn about advanced Item and BOM capabilities in Vault 2015 R2.
- Learn about the new Copy Design feature in Vault 2015 R2.
- Learn about new Vault Office client and more in Vault 2015 R2.



Vault 2015

Vault 2015

- Item/BOM Enhancements
 - Long Lead Items
 - Multiple Modeless Dialogs
 - BOM Tab Improvements
 - Other Item Improvements
- Inventor Vault Add-In Enhancements
- Other Vault Enhancements



Vault 2015 Item/BOM Enhancements – Long Lead Items





Related Class

- PL6547 All You Want to Know About Items in Vault Professional
 - Taught by William Schwerin and Anil Chintamaneni
 - Thursday, Dec 4, 10:00 AM 11:30 AM



Vault 2015 Item/BOM Enhancements - Long Lead Items

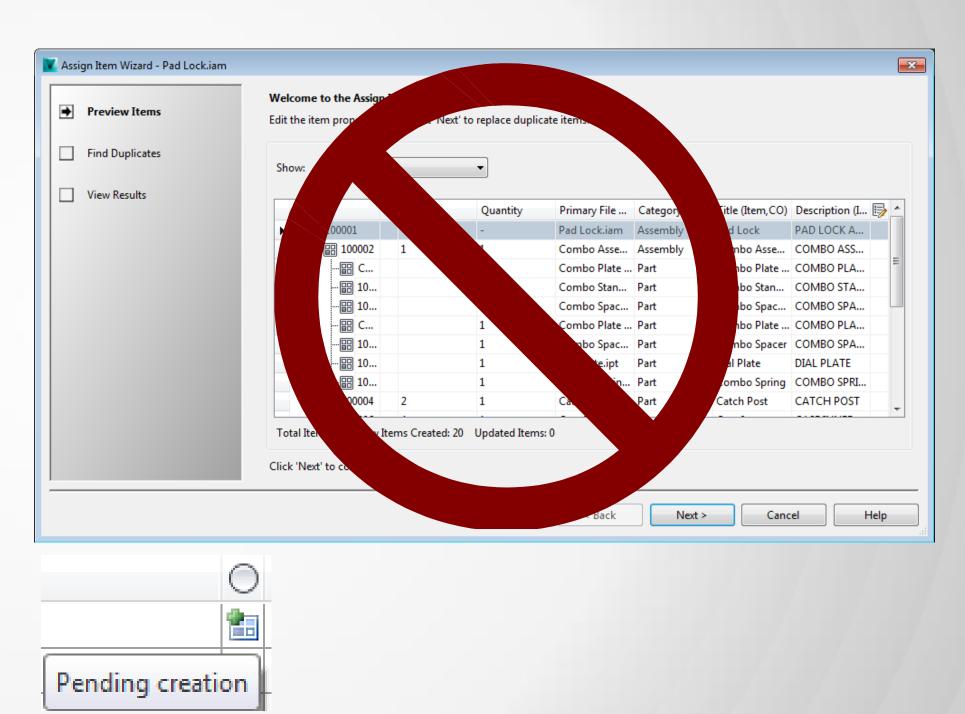
- Using Items was difficult if the entire design was not ready
- New workflows allow:
 - Use of Items on parts of the design
 - Items to be created before CAD data
 - BOM structure to be defined in advance of CAD data



Vault 2015 Item/BOM Enhancements - Long Lead Items No More Item Wizard

Item Wizard removed

Edit before commit







Vault 2015 Item/BOM Enhancements - Long Lead Items New Assignment Options

- Administrator control
 - Over which BOM entries get converted to Items
- Migration:
 - Migrated vaults set to 'All' (legacy behavior)
 - New vaults set to 'None'





Vault 2015 Item/BOM Enhancements - Long Lead Items BOM Components

- Unassigned BOM rows
- Excluded from operations
 - Export
 - Change State/Revision/Category
- Non-editable properties:
 - Number (Name)
 - Position Number
 - Quantity

Number	Row Order 🗡	Position Number	Quantity
□ Ⅲ 100002	-	-	-
Combo Spring	1	1	1
Combo Stand	2	2	1
Combo Spacer	3	3	1
Combo Spacer	4	4	2
Combo Plate L	5	5	1
Combo Plate	6	6	1
🔡 100007	7	7	1

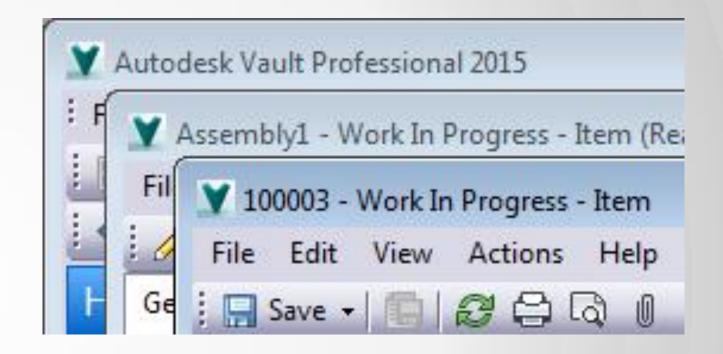


Vault 2015 Item/BOM Enhancements – Multiple Modeless Dialogs



Vault 2015 Item/BOM Enhancements Multiple Modeless Item Windows

- Multiple Item windows open at the same time
- Interact with both Item window and main app window
 - Drag & Drop, Copy & Paste
- Each window has entry on the Windows taskbar

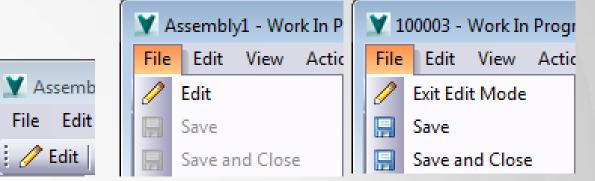


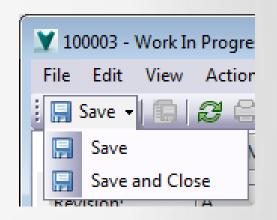




Vault 2015 Item/BOM Enhancements Multiple Modeless Item Windows - Viewing/Editing/Saving

- Enter and exit 'Edit' mode as needed
- Save as many times without exiting dialog or 'Edit' mode
- Open always starts dialog in 'View' mode
- Only 1 Item dialog can be in 'Edit' mode at a time
 - Some commands may be disabled
 - Error dialog with quick link to Item being edited





Y Error



OK-

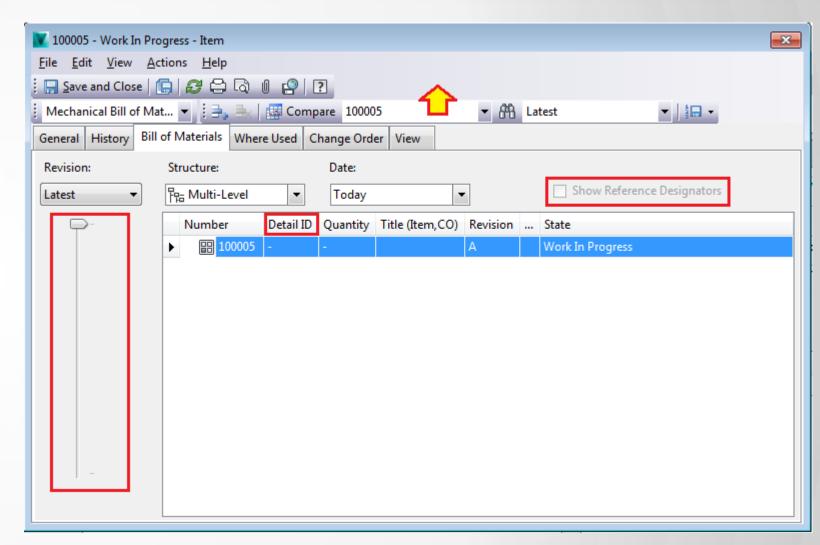
Vault 2015 Item/BOM Enhancements – BOM Tab Improvements





Vault 2015 Item/BOM Enhancements – BOM Tab Previous BOM Tab Layout

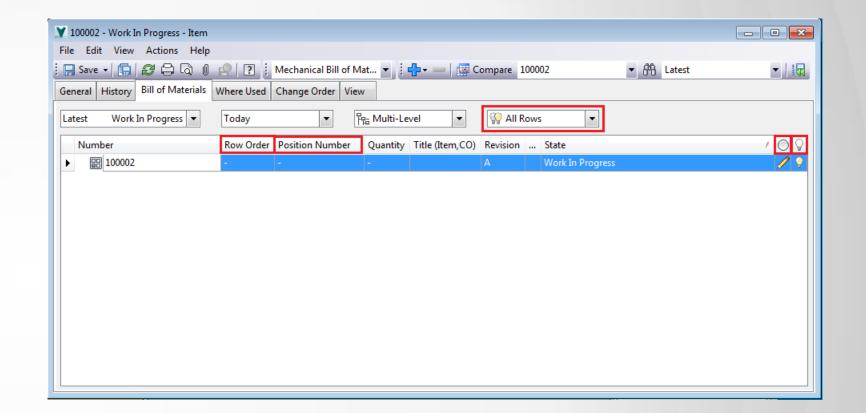
- Revision slider removed
- Detail ID column replaced
 - With Row Order
 - And Position Number
- Show Reference Designators removed
 - Replaced with menu option
- Toolbars moved to 1 line
 - But still customizable

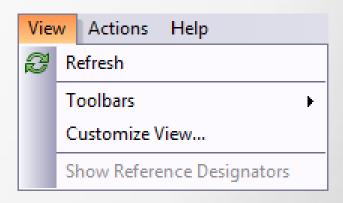




Vault 2015 Item/BOM Enhancements – BOM Tab New BOM Tab Layout

- New BOM property columns
 - Row Order
 - Position Number
 - Vault Status
 - On/Off column
- Show Reference Designators removed
 - Replaced with menu option
- Toolbars moved to 1 line
 - But still customizable
- On/Off Row Filter

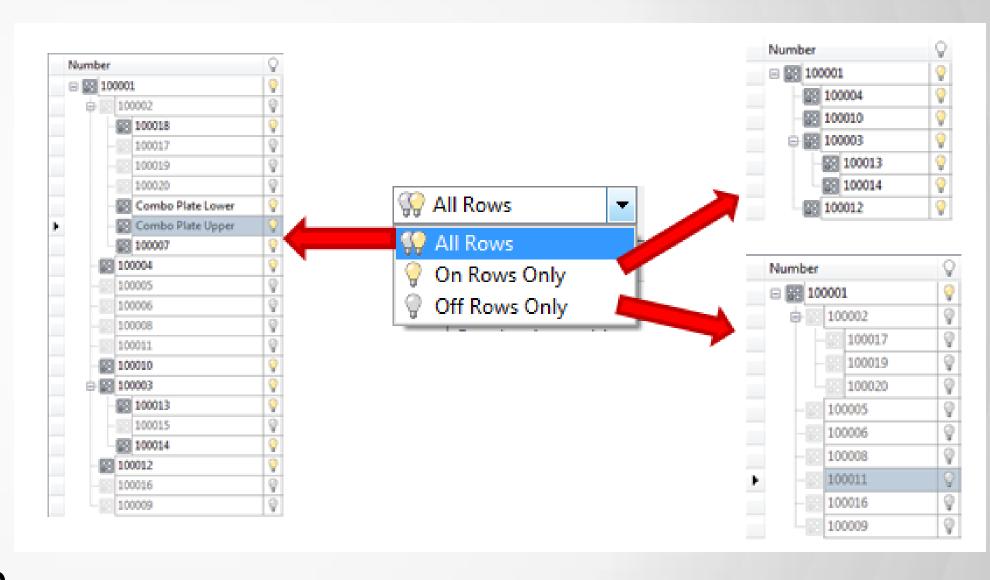






Vault 2015 Item/BOM Enhancements – BOM Tab On/Off Rows & Filter

- Rows can now be turned 'Off'
 - In BOM, but excluded
- Filter Settings:
 - All Rows
 - On Rows Only
 - Off Rows Only
- Children of 'filtered' parents are not shown

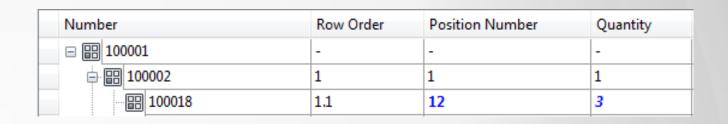


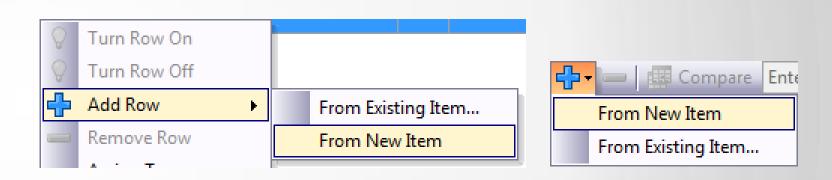


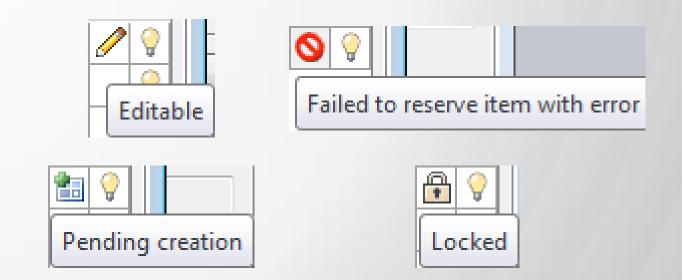
Vault 2015 Item/BOM Enhancements – BOM Tab Edit All Levels of BOM

- All rows available for editing
- Items are reserved on demand for editing
- Add row from new Item

 New Vault Status column indicates reservation, errors











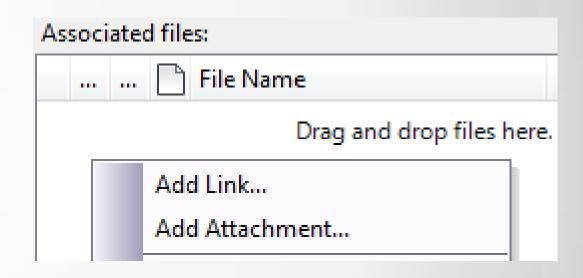
Vault 2015 Item/BOM Enhancements – Other Item Improvements





Vault 2015 Item/BOM Enhancements New Workflows For Associating Files And Items

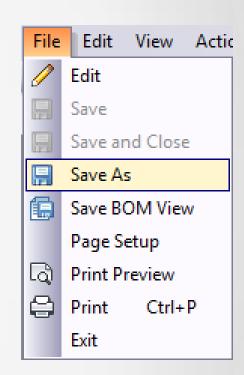
- Previous methods:
 - Add Link... command
 - Add Attachment... command
- Drag & Drop of files
 - To 'Associated files' grid
 - To Items in Item Master
 - To Item links
- Copy & Paste (Ctrl-C/Ctrl-V)





Vault 2015 Item/BOM Enhancements Save As Command

- New command in Item dialog file menu
- Save a copy of the current Item
 - Properties
 - Description
 - Title
 - Unit
 - Unit of Measure
 - Category
 - BOM structure
 - Associated attachments



Demo



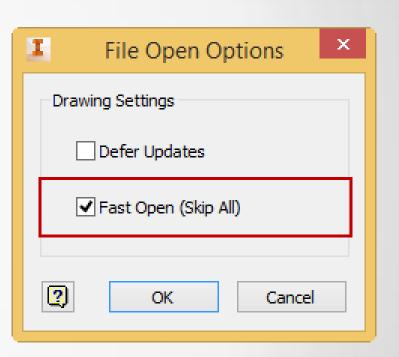


Vault 2015 Inventor Vault Add-In Enhancements



Vault 2015 Inventor Vault Add-In Enhancements Fast Open for Drawing Files (IDW & DWG)

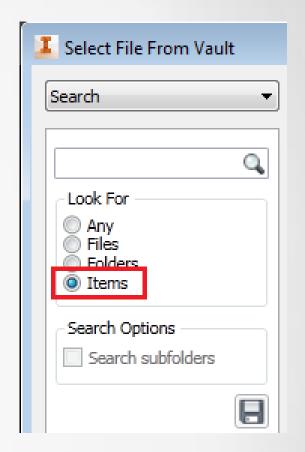
- Only IDW/DWG file is downloaded
- Available via Open from Vault dialog
 - Options... button
 - Only when IDW/DWG file selected

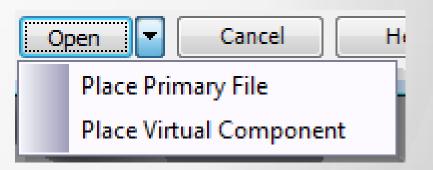




Vault 2015 Inventor Vault Add-In Enhancements Place Item from Vault

- Search Items in 'Select File From Vault'
- Place will:
 - Use Primary File
 - Create Virtual Component
 - Auto-fill properties
 - Title
 - Description
 - Part Number





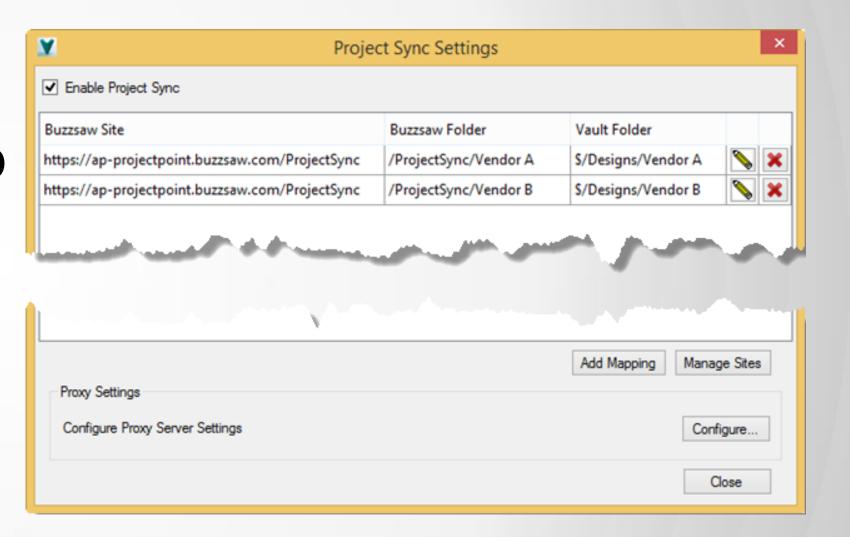
Demo

Vault 2015 Other Vault Enhancements



Vault 2015 General Vault Enhancements Project Sync Updates

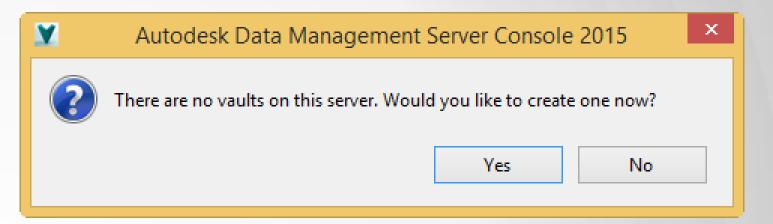
- Map multiple Buzzsaw folders to a Vault
- Map each Buzzsaw folder to a different Vault Folder

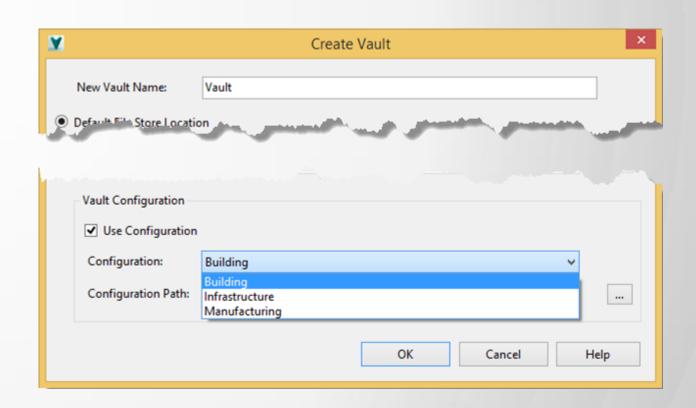




Vault 2015 General Vault Enhancements ADMS Console Updates

- No default 'Vault' database created
- Prompt to create first Vault
- Default configurations
 - Building
 - Infrastructure
 - Manufacturing







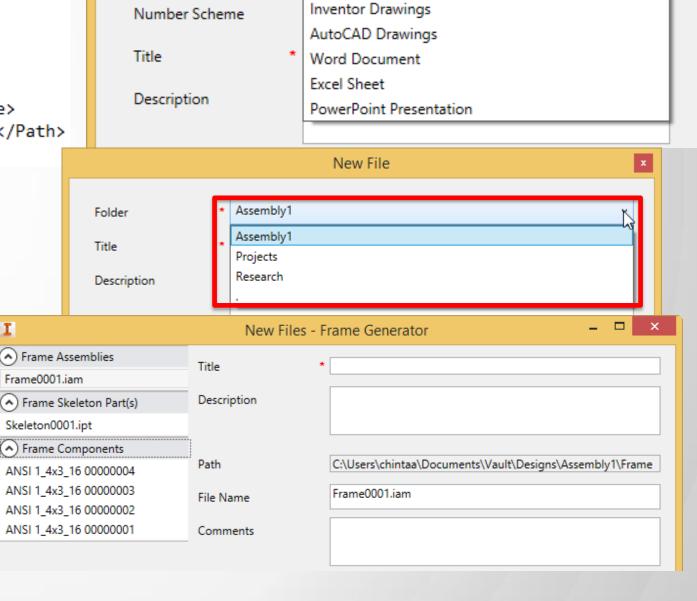
Vault 2015 General Vault Enhancements

Data Standard Enhancements

File.xaml customization

Sub-folder selection in Inventor

Properties for multiple files



New File

Base

Inventor Part

Inventor Part

Inventor Assembly

Category

Template

Document Type

Vault 2015 R2



Vault 2015 R2

- Item Lifecycle Rationalization
- Item/BOM Enhancements
- Thin Client Enhancements
- Vault Office Thick Client
- Copy Design
- Data Standard Enhancements



Vault 2015 R2 Item Lifecycle Rationalization



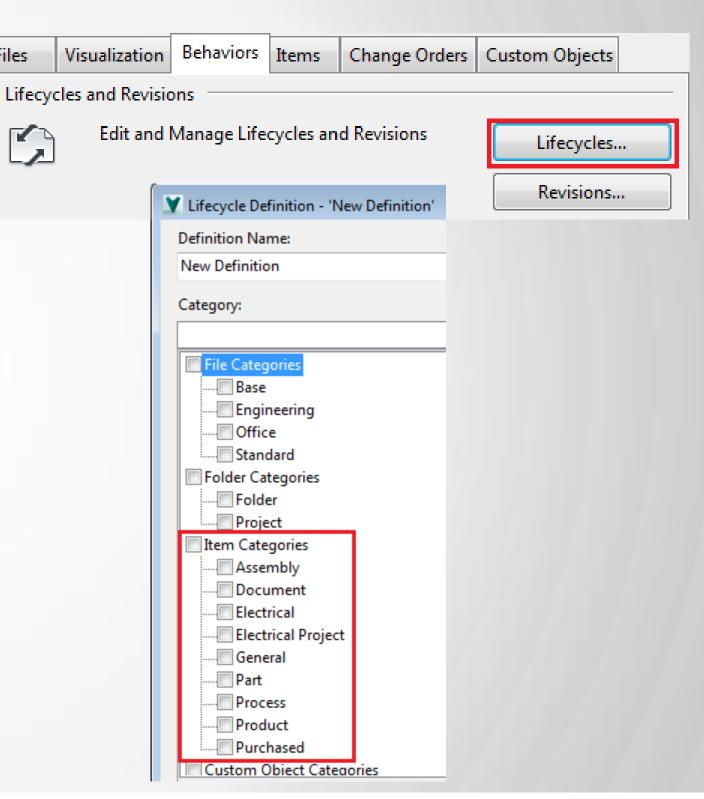
Related Class

- PL5397 I Want to Ride My Lifecycle
 - Taught by Ralf Walter and Alan Bathgate
 - Tuesday, Dec 2, 1:30 PM 2:30 PM



Vault 2015 R2 Item Lifecycle Rationalization

- Items now use Vault's configurable lifecycle engine
- Customize Item behavior
- Share lifecycle definitions with:
 - Files
 - Folders
 - Custom Objects
- Administration now in Behaviors/Lifecycles...



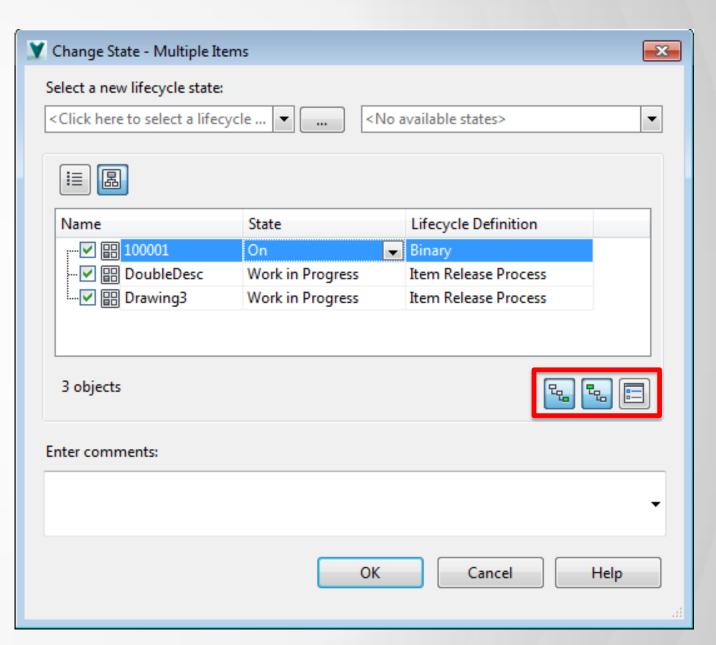
Vault 2015 R2 Item Lifecycle Rationalization Administration Configuration

- Configurable number/names of states
- Requirements enforcing:
 - Property value
 - Child Item state requirements
 - File link states per link type
 - Permissions on state transition
 - Security on a per-state basis.
- 'Obsolete', 'Released' states



Vault 2015 R2 Item Lifecycle Rationalization Change [Category, State, Revision] Workflow Unification for Items

- Same GUI as Files, Folders, and Custom Objects
- Uses relationship gathering options
 - Instead of 'Apply to Children' option



Demo

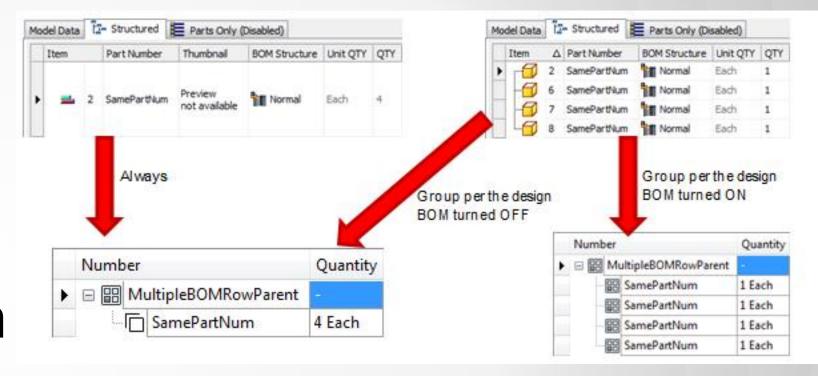


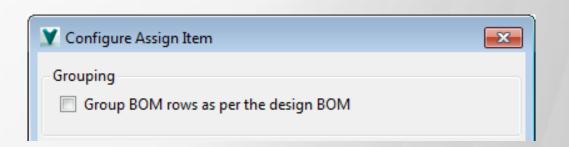
Vault 2015 R2 Item/BOM Enhancements



Vault 2015 R2 Item/BOM Enhancements Grouped Rows & Multiple BOM Rows

- More accurate representation of CAD BOM
- Administrator control over legacy (Grouping) behavior
- Multiple rows with same Item under same parent
- Each row can:
 - Have different amounts/units
 - Have different BOM row properties

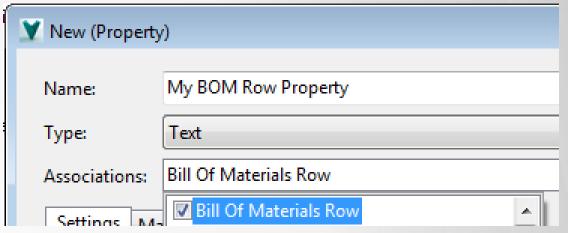


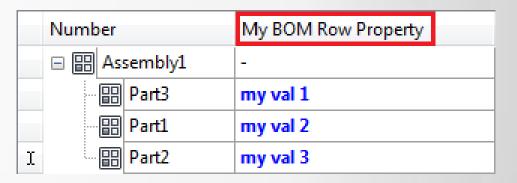




Vault 2015 R2 Item/BOM Enhancements BOM Row Properties

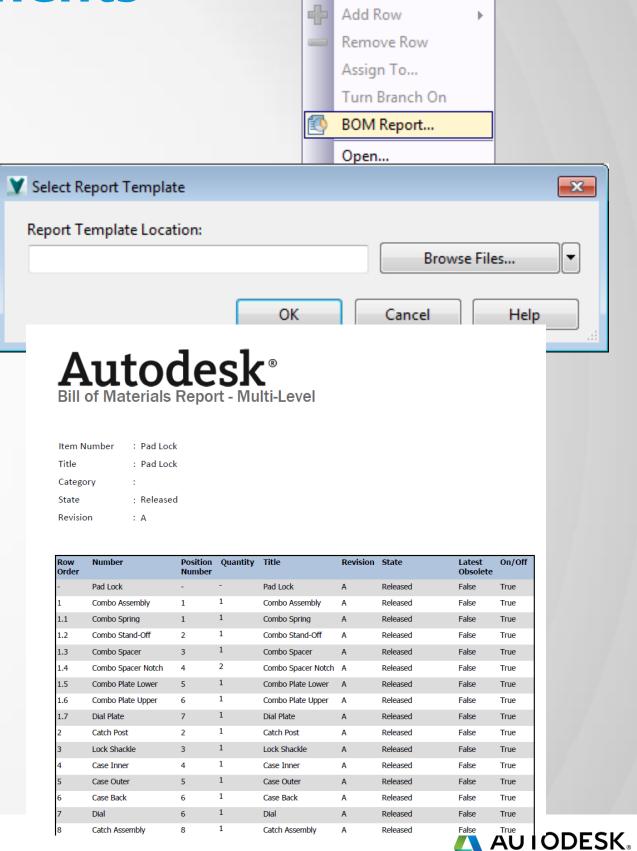
- Each parent's reference to an Item within a BOM to have its own properties
- Admin configurable user-defined properties
- Limited property behaviors
 - Initial value
 - Suggested value list
 - Read-mapping (value from file)





Vault 2015 R2 Item/BOM Enhancements BOM Reports

- Command in read-only BOM view
- Supports BOM Row properties
- Select report from Vault or disk
- 3 Templates supplied:
 - Multi-level
 - First-level
 - Parts-only
- Report Template Authoring utility support

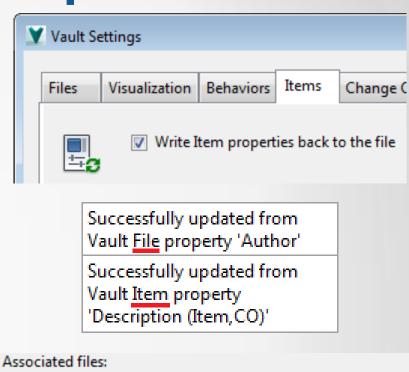


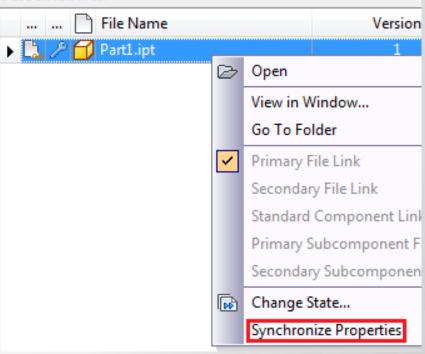
Turn Row On

Turn Row Off

Vault 2015 R2 Item/BOM Enhancements Item Property Writeback within the Vault Explorer Client

- Write Item properties to single:
 - Primary association
 - Secondary association
 - Tertiary association
- Admin control affects all clients
- Enhanced result reporting
- Synchronize Properties command available on Associated files grid
- Job Processor







Vault 2015 R2 Item/BOM Enhancements

Item Iterations

- See historic 'Work In Progress' item versions
- When 'Off'
 - Tip 'Consumable' version
 - Released, Obsolete
 - Or Tip version if no 'Consumable'

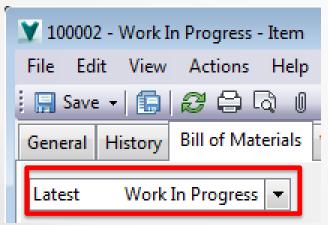
Lat	est Work in F	Today		
	Revision	Lifecycle State	Version	
	Latest	Work in Progr	12	2
	С	Work in Progr	12	2
	B.1	Released	10	0
	В	Work in Progr		5
	Α	Released	:	3

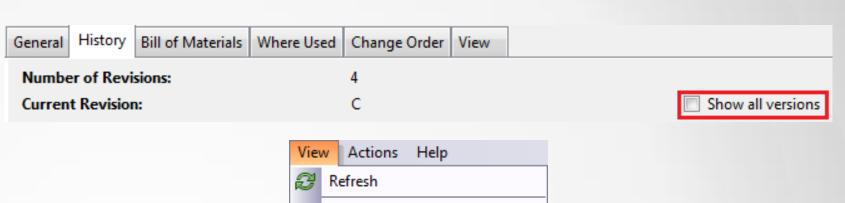
Lat	est Work in I	Progress 🔻	Today			
	Revision	Lifecycle State	Version			
•	Latest	Work in Progr	12			
	С	Work in Progr	12			
	С	Work in Progr	11			
	B.1	Released	10			
	B.1	Quick-Change	9			
	B.1	Quick-Change	8			
	B.1	Released	7			
	B.1	Work in Progr	6			
	В	Work in Progr	5			
	В	Work in Progr	4			
	A	Released	3			
	A	Work in Progr	2			
	A	Work in Progr	1			
x						



Vault 2015 R2 Item/BOM Enhancements Item Iterations

- New 'sticky' option
- Affects:
 - 'History' tab
 - 'General' tab version selection
 - 'BOM' tab version selection
 - 'Where Used' tab version selection
 - 'Attachments' window version selection





Toolbars

Customize View...

Show All Item Versions

Show Reference Designators

Demo





Related Class

- PL6547 All You Want to Know About Items in Vault Professional
 - Taught by William Schwerin and Anil Chintamaneni
 - Thursday, Dec 4, 10:00 AM 11:30 AM

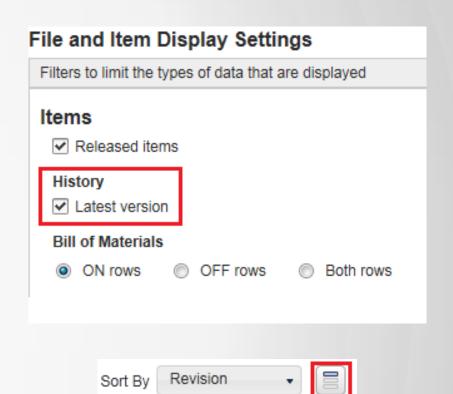


Vault 2015 R2 Thin Client Enhancements



Vault 2015 R2 Thin Client Enhancements Show All Versions for Item History

- See historic 'Work In Progress' item versions
- Default is Administrator controlled
- Local override

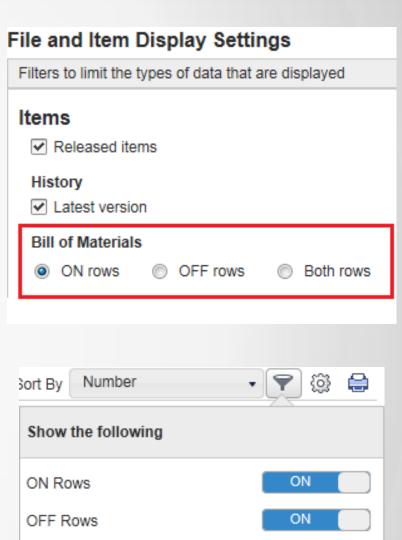


Toggle

versions

Vault 2015 R2 Thin Client Enhancements On/Off Row Filtering for BOM views

- Admin control over default
- Local user override
 - Sticky for session
 - Control over:
 - ON Rows
 - OFF Rows
 - Non-released Items



Non-released Items

ON

Apply

Vault 2015 R2 Thin Client Enhancements BOM Row Properties

- Show in 'Configure Properties' dialog
- Can be:
 - Added
 - Removed
 - Re-ordered
 - Sorted

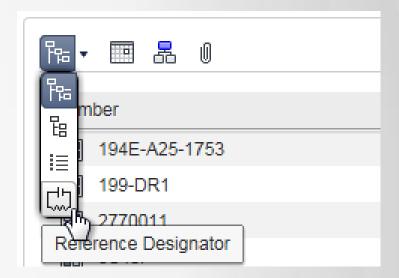


Number 🛦	My BOM Bool Property	My BOM Date Property	My BOM Num Property	My BOM Row Property
Part1	True		1	my val 2
= 100002		1/1/2014	2	
= 100003	False		3	my val 4
₽ Part2	True	12/4/2014		my val 3
₽ Part3			4	my val 1



Vault 2015 R2 Thin Client Enhancements Reference Designator View

- View for ACAD Electrical
- Different default properties:
 - Tag
 - Location
 - Installation



Demo





Vault 2015 R2 Vault Office Thick Client



Related Class

- PL6282 Vault Office: Manage Your TPS Reports
 - Taught by John Krause
 - Thursday, Dec 4, 1:00 PM 2:00 PM



Vault 2015 R2 Vault Office Thick Client

- Vault for the non-CAD user
 - Different license type
- New installer options
 - Vault Office 2015 R2 client
- Old installer options
 - MS Office Add-In
 - MS Outlook Add-In





Vault 2015 R2 Vault Office Thick Client Commands

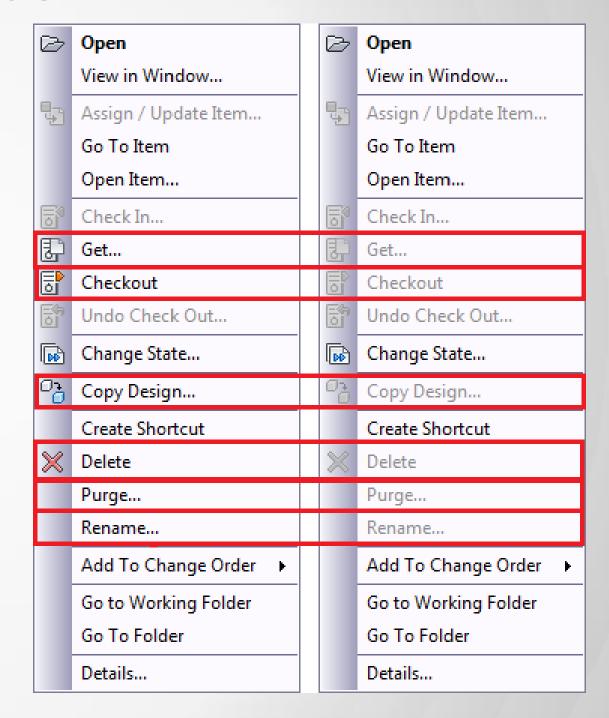
- New Checkout command
- Disabled commands
 - Create Item
 - Assign/Update Item
 - Edit Item
 - Change Item Number

- Update View
- Job Queue...
- Administration
- Options...



Vault 2015 R2 Vault Office Thick Client Commands

- Commands disabled for CAD files
 - Get...
 - Checkout/Checkin/Undo Checkout
 - Change [Category, Revision]
 - Add/Edit/Sync Properties
 - Delete and Purge
 - Move, Rename and Replace
 - Copy Design





Vault 2015 R2 Copy Design



Related Class

- PL5873-P How to Get Away with Copying All of Your
 Work
 - Taught by Allan O'Leary and Adam Luttenbacher
 - Wednesday, Dec 3, 1:00 PM 2:00 PM



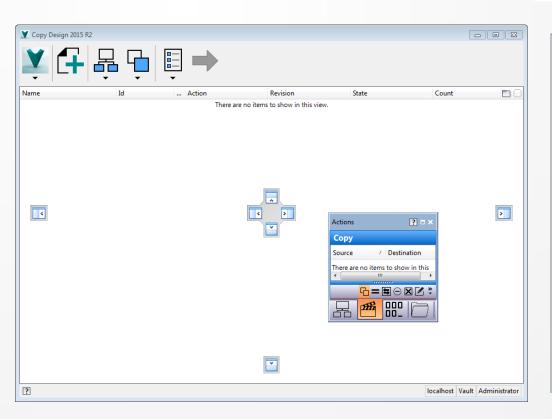
Vault 2015 R2 Copy Design

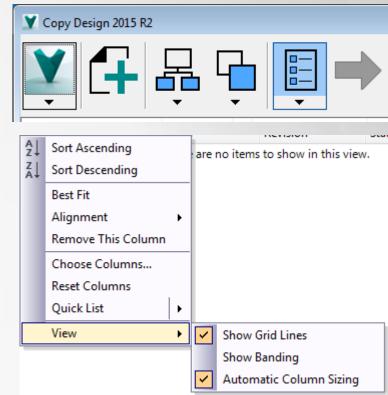
- Re-written from ground up
- Stand-alone application
- Performance and memory usage optimized
 - Server-side copy
- Number Scheme integration
- New workflows and interactions
 - Multiple root nodes
 - Instance based actions

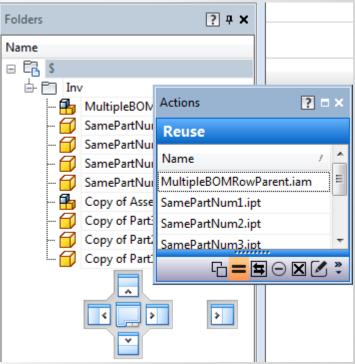


Vault 2015 R2 Copy Design Main Interface

- Stand-alone application
- Ribbon-based toolbar
- Customizable grids
- Dockable panels



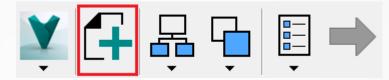




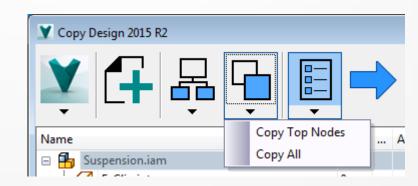


Vault 2015 R2 Copy Design Ribbon-Based Toolbar

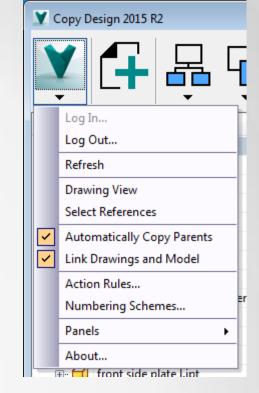
- Main action menu button
- 'Add objects' button

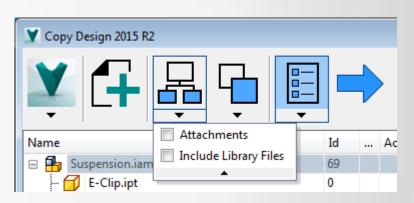


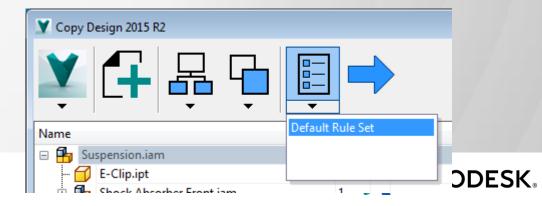
- 'Include Children' button
- 'Copy Settings' button



'Rule Sets' button



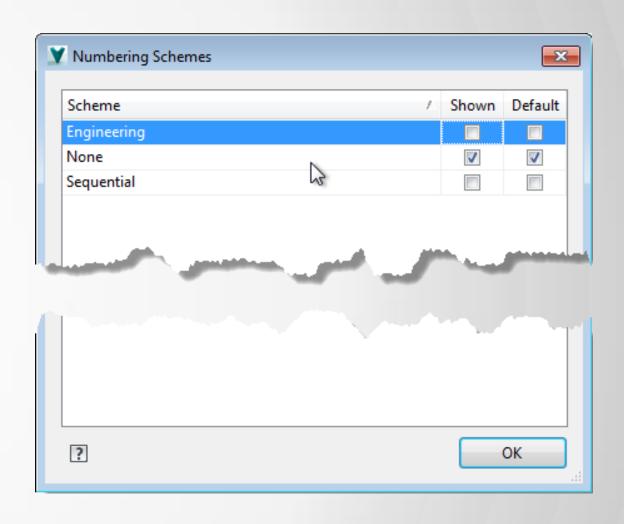






Vault 2015 R2 Copy Design Numbering Schemes

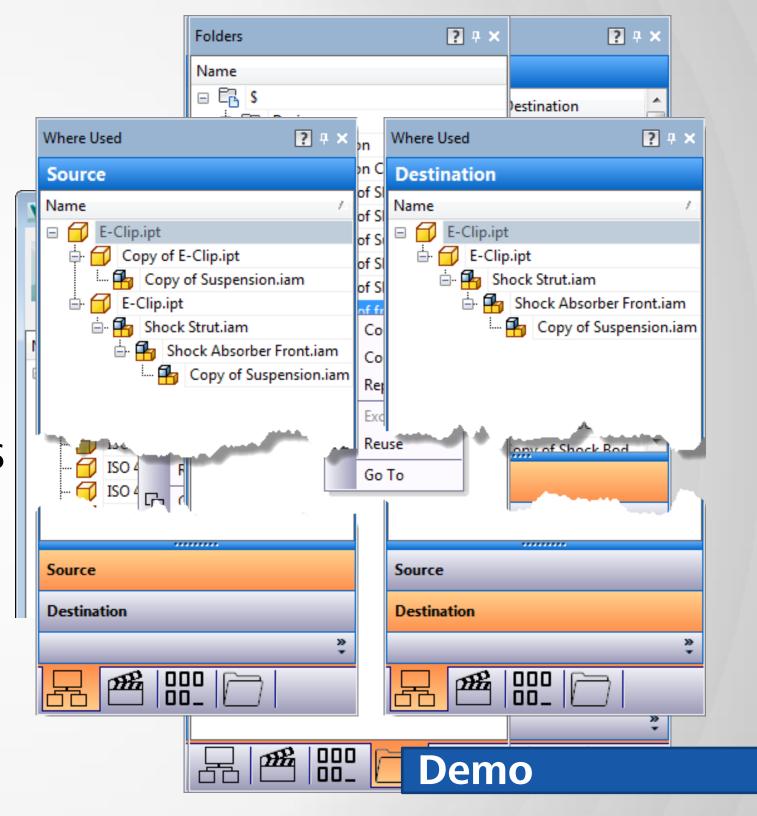
- Interacts with existing number schemes
- Set availability for 'Numbering' panel
- Set default





Vault 2015 R2 Copy Design Panels

- Actions Panel
 - View and set actions for instances
- Numbering Panel
 - Set names of copied files
 - Integrated with numbering schemes
- Folders Panel
 - Vault folder structure view
- Where Used Panel
 - Shows design view for original and copied design



Related Class

- PL5873-P How to Get Away with Copying All of Your
 Work
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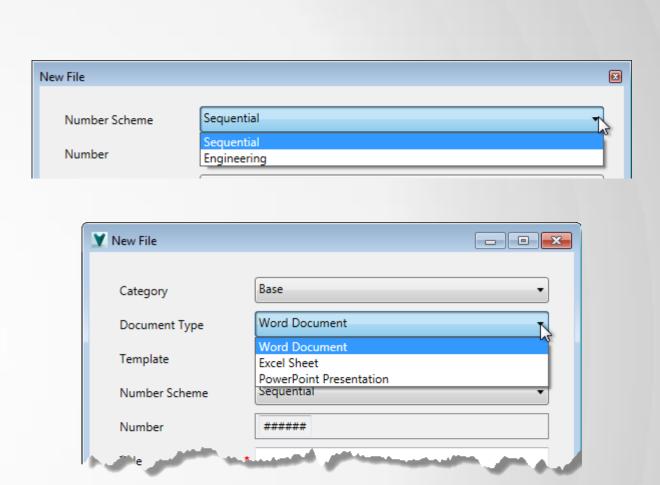


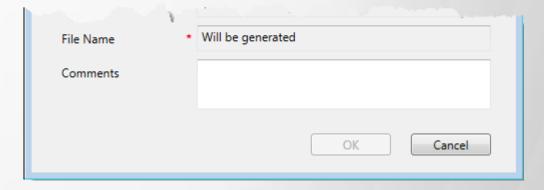
Vault 2015 R2 Data Standard Enhancements



Vault 2015 R2 Data Standard Enhancements

- New File dialog includes
 Numbering Schemes
 - Fields for input where user input needed
 - VE and Inventor add-in
- Vault Office New File dialog shows non-CAD doc types
 - Configurable via FileOffice.xaml







- PL6489 Trees are Celebrating: Our Engineering
 Department is 99% Digital with Vault Pro
 - Tuesday, Dec 2, 1:30 PM 2:30 PM
- PL6526 Return of The Data Management Avengers
 - Wednesday, Dec 3, 8:00 AM 9:30 AM
- PL5898 Top 10 Workflows that Vault Makes Better for AutoCAD Users
 - Wednesday, Dec 3, 8:00 AM 9:30 AM



- PL5077 Looking into the Crystal Ball: The Future of PDM at Autodesk
 - Wednesday, Dec 3, 1:00 PM 2:00 PM
- PL6164 Analyze That: Vault Reporting and Monitoring
 - Wednesday, Dec 3, 1:00 PM 2:00 PM
- PL5827 Unlocking the Power of the Job Processor
 - Wednesday, Dec 3, 3:00 PM 4:00 PM
- PL6015-P Every Silver Lining Has a Vault in the Cloud
 - Wednesday, Dec 3, 3:00 PM 4:00 PM



- PL5962-P Hitchhiker's Guide to Property Management
 - Wednesday, Dec 3, 4:30 PM 5:30 PM
- PL5315 The Devil is In the Detail—PDM and PLM: Parker Hannifin Corporation's Journey
 - Wednesday, Dec 3, 4:30 PM 5:30 PM
- PL7015-P Vault Features You Aren't Using But Need To Be: The Sequel
 - Thursday, Dec 4, 8:00 AM 9:30 AM



- PL6274-P Data Standard introduction
 - Thursday, Dec 4, 10:00 AM 11:30 AM
- PL5843-P Vault GPS: Make All the Right Turns During Your Vault Upgrade
 - Thursday, Dec 4, 1:00 PM 2:00 PM
- BM7938 Enterprise, It's not just a Starship Enterprise
 Data management... the new frontier
 - Thursday, Dec 4, 1:00 PM 2:00 PM



- PL5839-P Don't Flirt with Disaster: Create a Vault Recovery Plan
 - Thursday, Dec 4, 3:00 PM 4:00 PM
- PL5314 PDM 2014 @ Franke: Global replacement of a running data management system
 - Thursday, Dec 4, 3:00 PM 4:00 PM



Questions

Summary



Session Feedback

Via the Survey Stations, email or mobile device

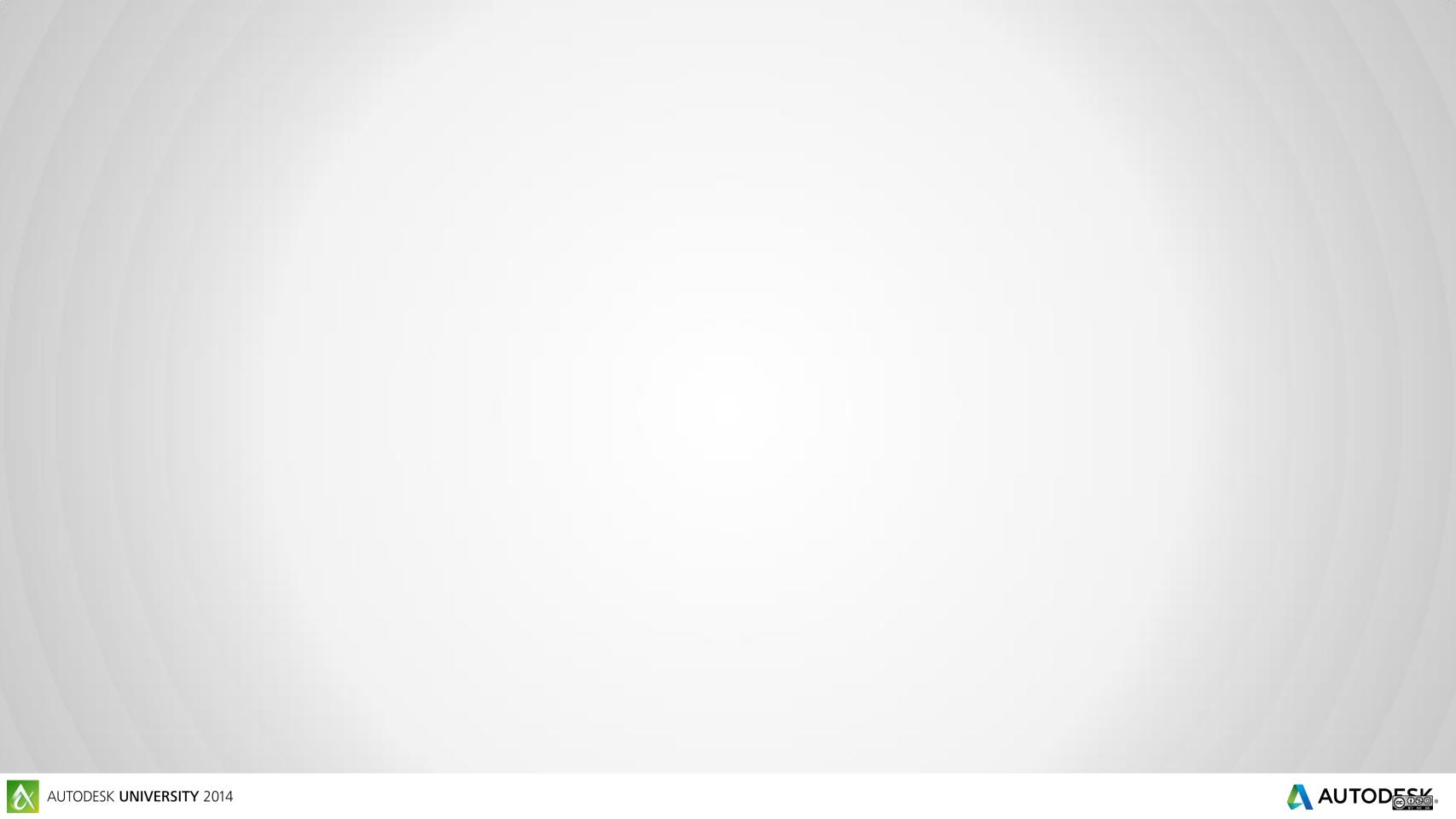
AU 2014 passes given out each day!

Best to do it right after the session

Instructors see results in real-time













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