



Autodesk *Vault-2-Cloud* Sample Application | Case Study

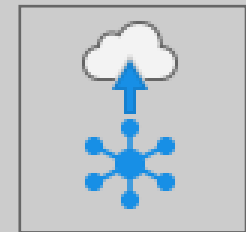
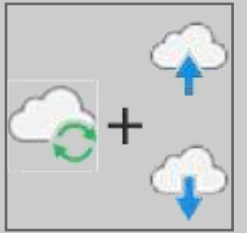
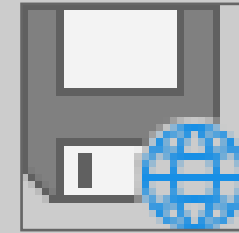
User interactive file sharing on Autodesk platform offerings

Markus Koechl

Solutions Engineer PDM|PLM | [Community Profile](#)

Agenda

- General Use Cases | Offerings
- Default Solution Options
 - Vault Shared Data | Vault Project Sync – Manual Sync
- Case Study | Requirement – User-initiated/Semi-automated file sharing
 - Vault Extension Sample “Vault-2-Cloud – User Cloud Upload”



Use Case | Offerings

Overview




- Share and communicate 3D/2D design views
- Share and communicate 3D/2D design files (native), Microsoft Office, and any other native or neutral file formats
- Share and collaborate on 3D/2D design (native), 3D coordination models (BIM), or any other native or neutral file formats
 - Automation and workflow integration options



General Requirements

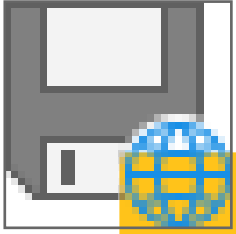
Default Options

Comparison Matrix

Shared View	Share Data	Project Sync
		
Share and collaborate on <i>visual representation</i> using Autodesk Viewer	Share your office files, 2D or 3D design data deliverables with customers and suppliers using Autodesk Drive, Autodesk Docs or Fusion Team	Collaborate bi-directionally on office and native CAD files or neutral representations with customers and suppliers using Autodesk Docs or Fusion Team
Bi-directional markup and comments	Uni-directional file sharing/updating	Uni- and bi-directional file sharing/updating
User interactive workflow	User interactive workflow	User interactive workflows and automation options

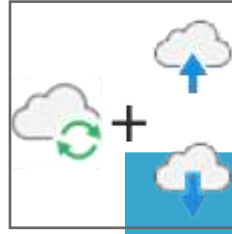
Autodesk Vault - Cloud File Sharing Options

Use Cases | Targets and Scope



User Interactive Sharing

- Autodesk Default **Pack and Go** Wizard
- Targets
 - OS/network folders, Zip Package Files
 - Autodesk Drive
 - Autodesk Docs
 - Autodesk Fusion 360
- **Scope = User Access/Project Membership**



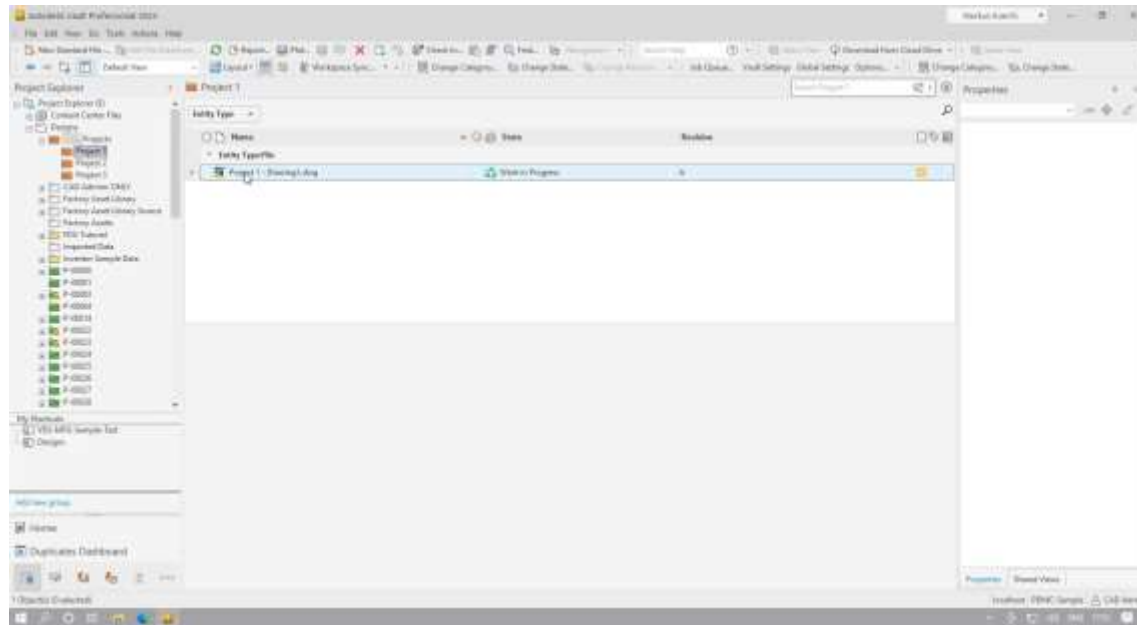
User Initiated Sharing

- Autodesk Default **Project-Sync** Options
- Targets
 - Autodesk Docs
 - Autodesk Fusion 360
- **Scope = System Access/Target Project Configuration**

Autodesk Default Solution Options

Shared Data | Project Sync

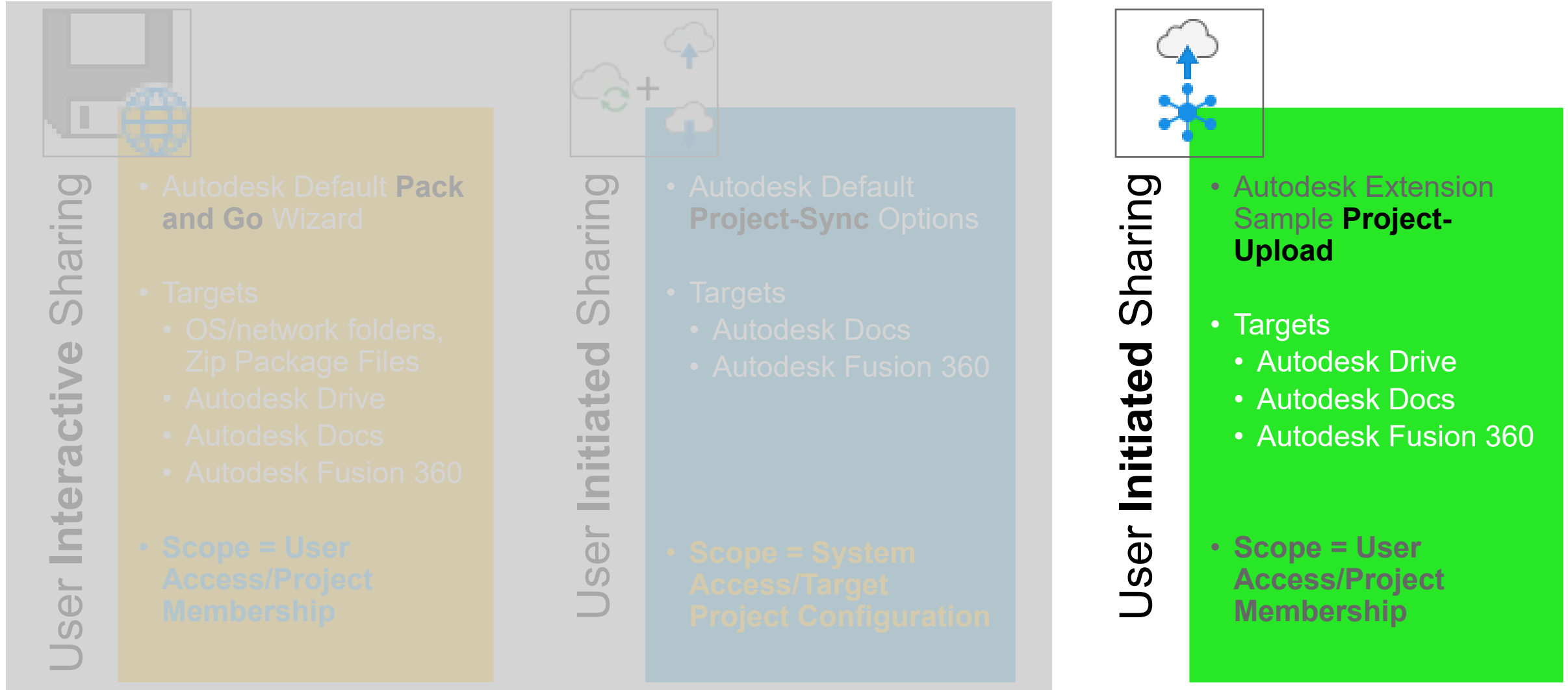
- Autodesk Vault - Shared Data Workflows
- Autodesk Vault – Project Sync Workflows



**User-initiated/Semi-
automated file sharing**

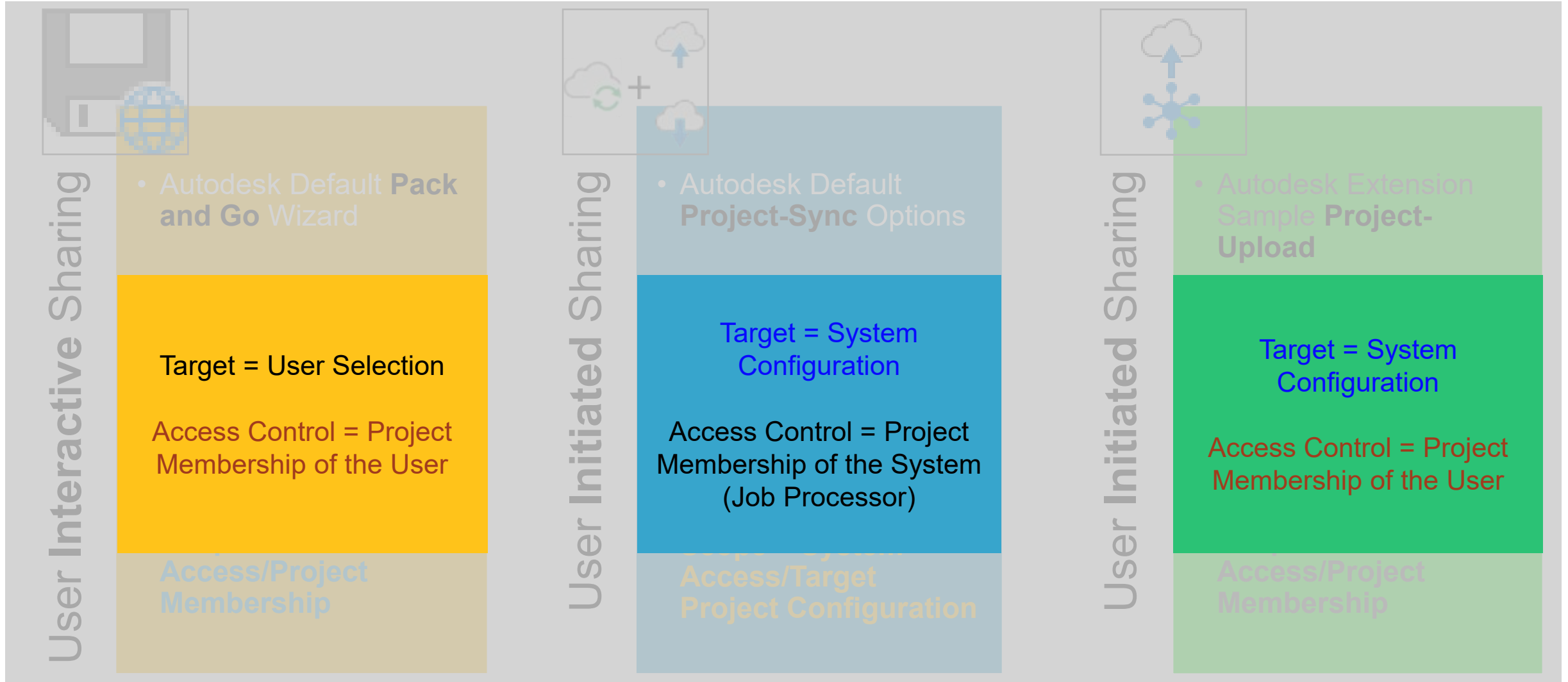
Client Extension Sample “User Cloud Upload”

Use Cases | Targets and Scope



Client Extension Sample “User Cloud Upload”

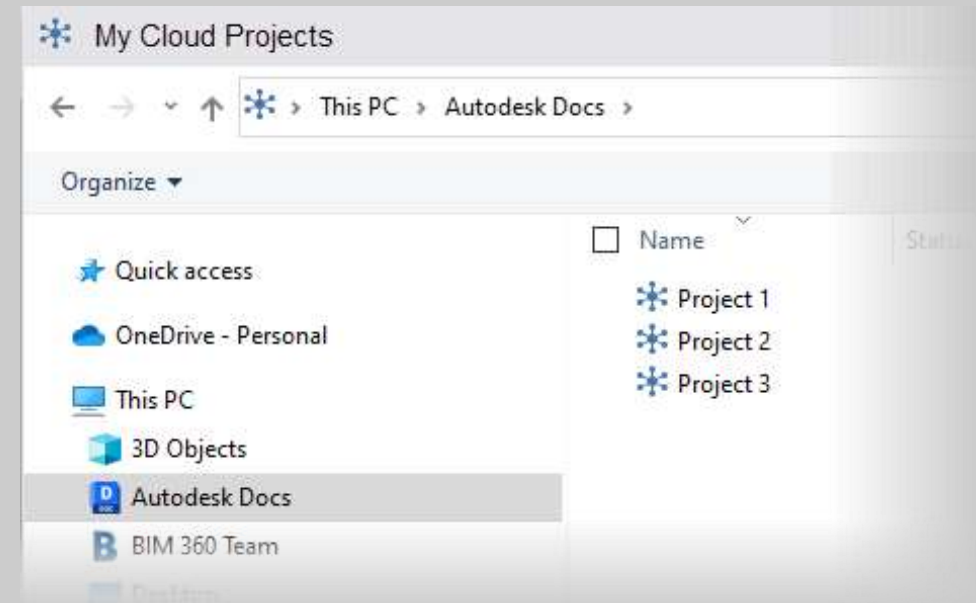
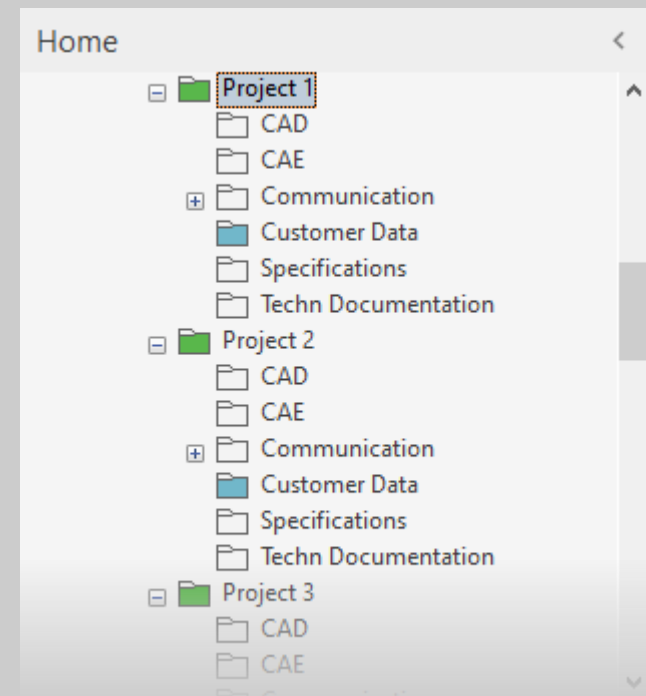
Targets and Scope



“User Cloud Upload”

Use Case | Requirement

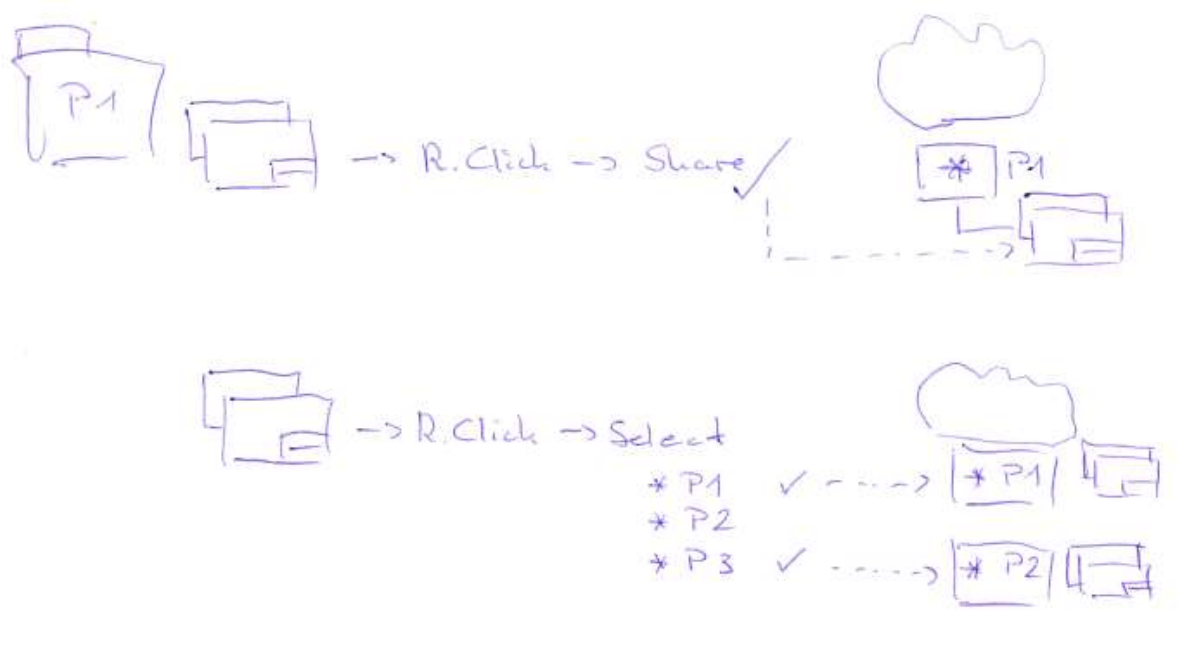
- User “A” is an Autodesk Docs project member of
 - Project 1 | Project 2 | Project 3
- User “B” is an Autodesk Docs project member of
 - Project 2 | Project 7
- Users A and B have access to Autodesk Vault Projects 1 ... n
- User “A” selects a drawing from Project 1 to be shared...
 - **Default = corresponding A.Docs Project 1**
 - *Occasionally = select any available Project 1, 2, 3*



“Ideal Solution”

User A's perspective

- Upload to the **corresponding** project
 - Select/Multiselect files in Vault
 - Right-Click -> Upload to Autodesk Docs Project
 - Preview -> OK
- Upload to **another** project
 - Select/Multiselect drawings in Vault
 - Right-Click -> Upload to...
 - Select projects, e.g., Project 1 and Project 3
 - Preview -> OK



Solution Design

Client Extension Sample “User Cloud Upload”

Configuration Options - *Mapping*

- *Filename – append UDPs*
 - *Pre-Defined: Title | Index*
- *Allowed Cloud Drives*
 - *Enable drives selectable for users*
- *Project Properties storing mapping*
 - *Cloud Drive Path (e.g., ACCDocs\Project 1\Project Files)*
 - *Cloud Path*

The screenshot shows the 'Vault-2-Cloud -- Sample Application | Admin Options' window with the 'Mapping' tab selected. The 'File Naming Convention' section shows 'Filename' with a separator '-' and dropdowns for 'Title' and 'Revision'. The 'Cloud Drives' section has three checked options: 'Autodesk Drive', 'Autodesk Docs', and 'Autodesk Fusion Team'. The 'Project Properties' section includes dropdowns for 'Folder Category' (set to 'Project'), 'Cloud Drive Path' (set to 'Cloud Drive Path'), and 'Cloud Drive URL' (set to 'Cloud URL'). At the bottom, there are buttons for 'Import Settings', 'Export Settings', 'Load from Vault', and 'Save to Vault'.

Vault-2-Cloud -- Sample Application | Admin Options

Mapping File Type Filter

File Naming Convention

Filename - Title - Revision Optional: Leave blank, if no suffix is needed.

Cloud Drives

☒ Autodesk Drive ☒ Autodesk Docs ☒ Autodesk Fusion Team

Select all drives exposed for user project selections or the auto-search option for corresponding cloud projects. Projects with valid Desktop Connector drive mappings ignore this option.

Project Properties

Folder Category Project Folder Category Name of folders to be mapped as corresponding Vault project to Cloud project.

Cloud Drive Path Cloud Drive Path User Defined Property to store the mapped local drive (Desktop Connector).

Cloud Drive URL Cloud URL User Defined Property to store the cloud projects online path (URL).

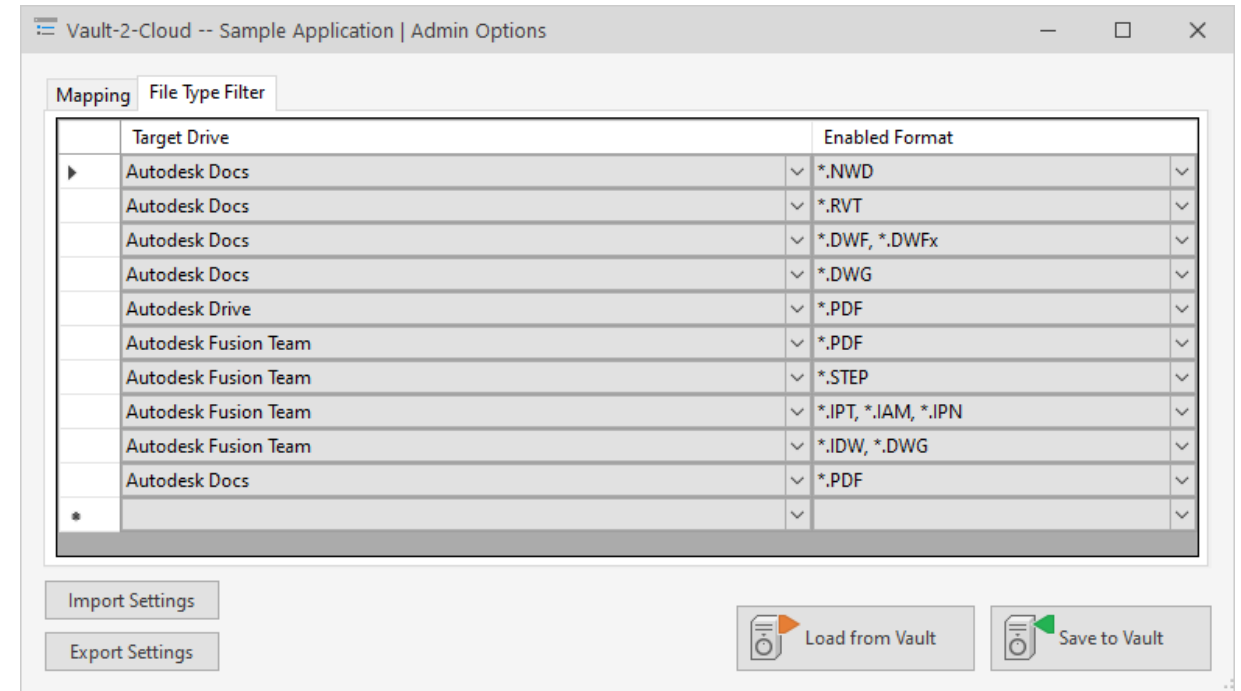
Import Settings Export Settings Load from Vault Save to Vault

Solution Design

Client Extension Sample “User Cloud Upload”

Configuration Options – *File Type Filter*

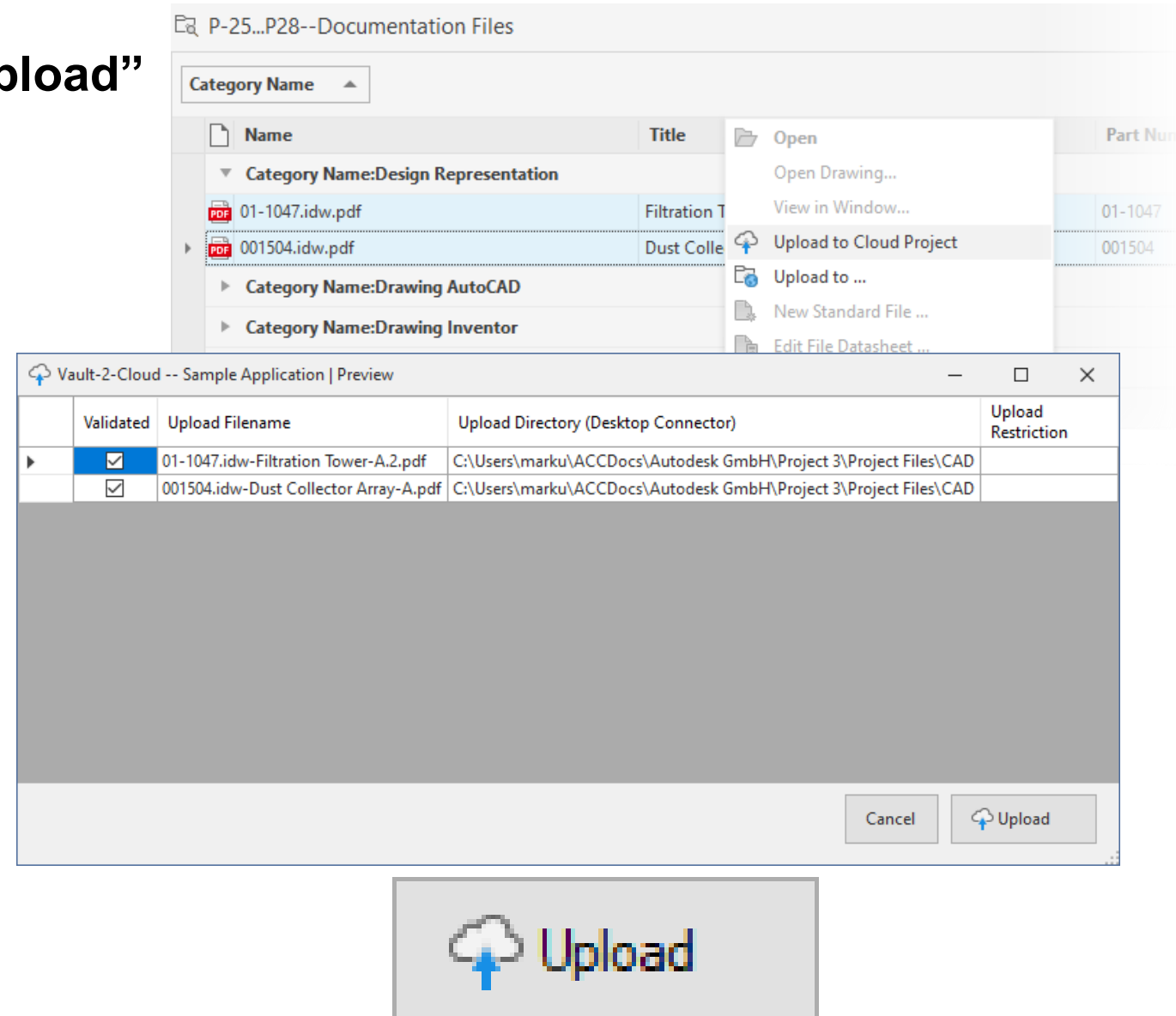
- *Configure allowed file types per cloud application*
 - *E.g., Autodesk Docs may get any architectural file type, while Autodesk Fusion may get native Inventor files only*



Solution Design

Client Extension Sample “User Cloud Upload”

- User Context Menu “Upload to Cloud Project”
 - Preview Dialog
- User Context Menu “Upload to ...”
 - Project Selection
 - Preview Dialog
- Detail Tab
 - WebView
 - Table – Upload History
 - Date | Username | Vault Version



Solution Design

Client Extension Sample “User Cloud Upload”

- User Context Menu “Upload to Cloud Project”

- Preview Dialog

- User Context Menu “Upload to ...”

- Project Selection

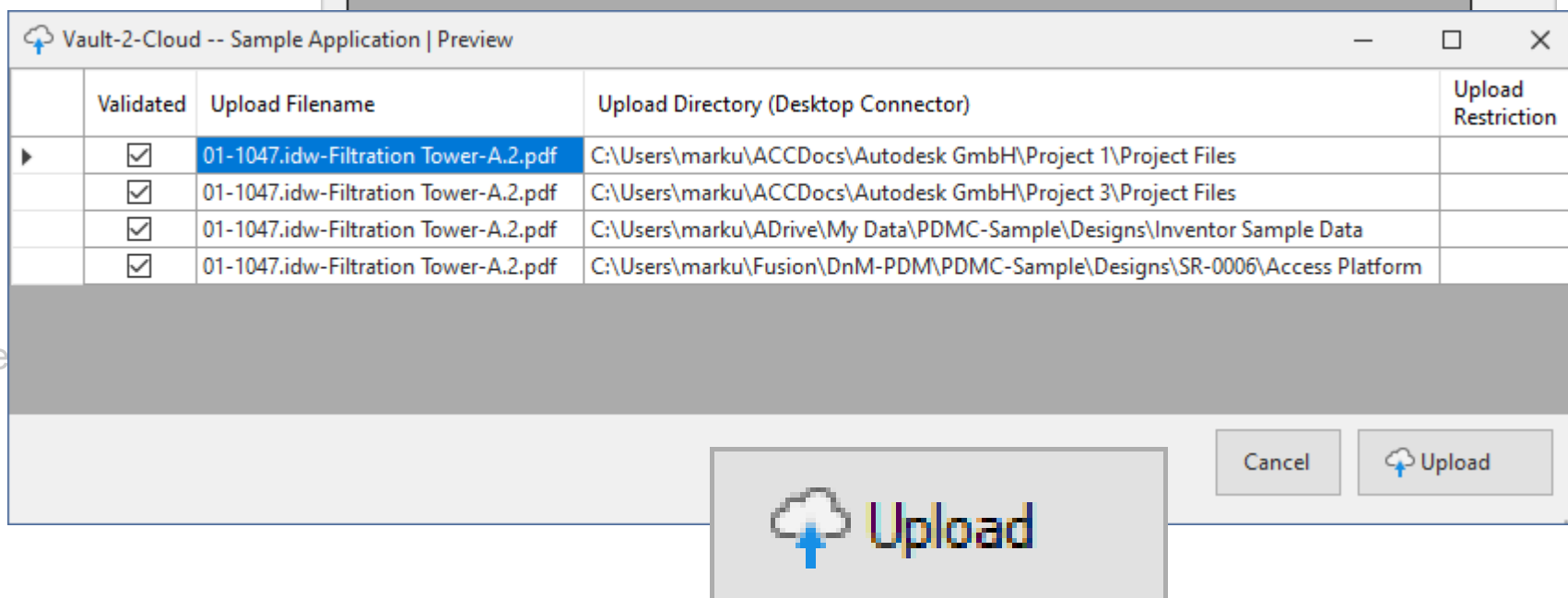
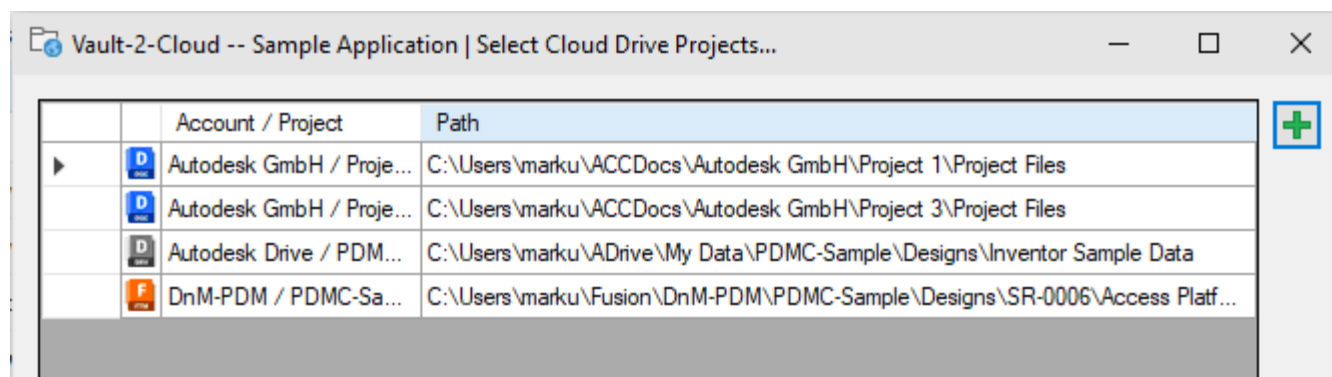
- Preview Dialog

- Detail Tab

- Table – Upload History

- Date|Username|Vault File/Ve

- WebView

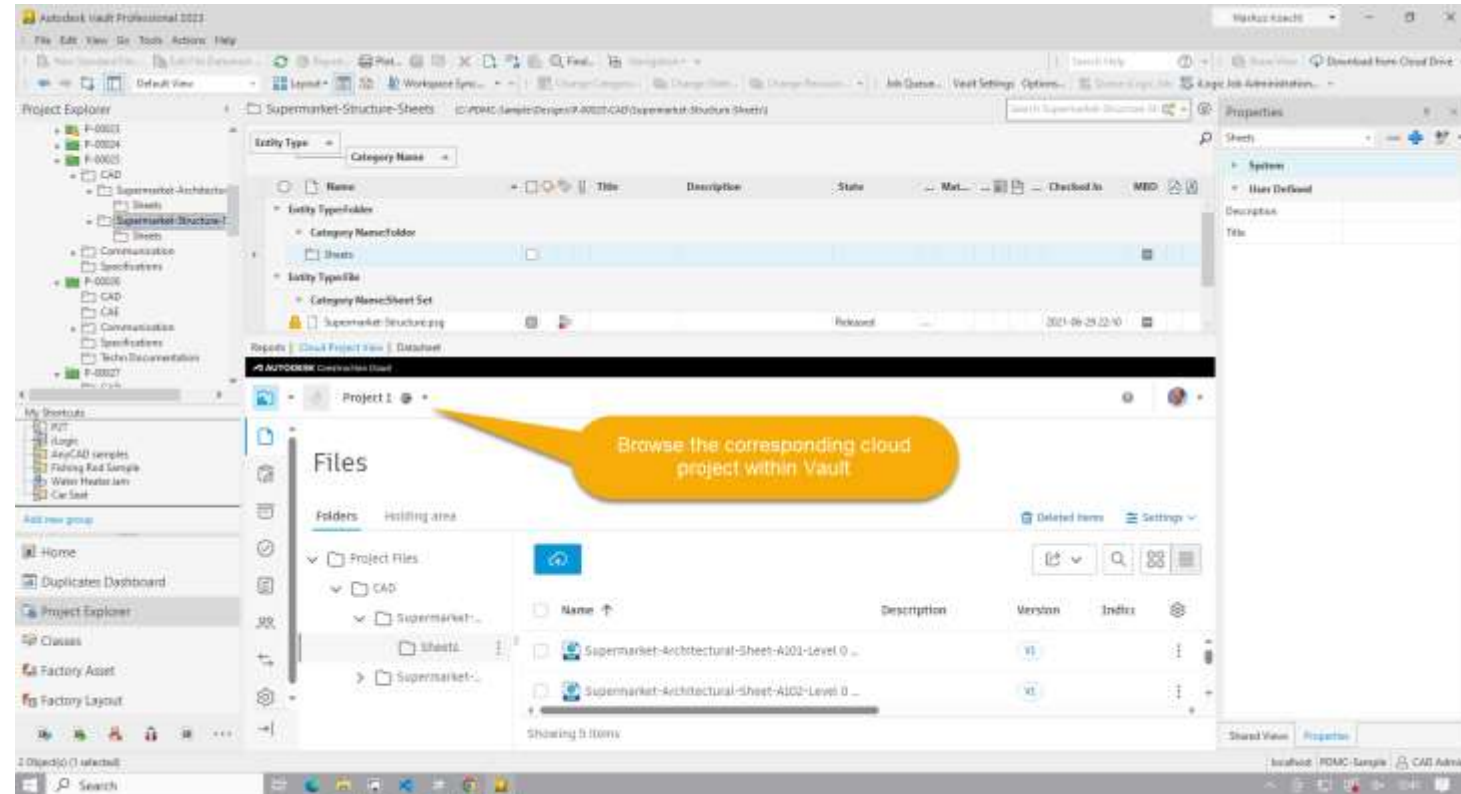


Solution Design

Client Extension Sample “User Cloud Upload”

- User Context Menu “Upload to Cloud Project”
 - Preview Dialog
- User Context Menu “Upload to ...”
 - Project Selection
 - Preview Dialog
- Detail Tabs
 - Cloud Project View
 - *Cloud Upload History (Table)*
 - *Date|Username|Vault File|Version|Upload Name (Entity Attributes)*

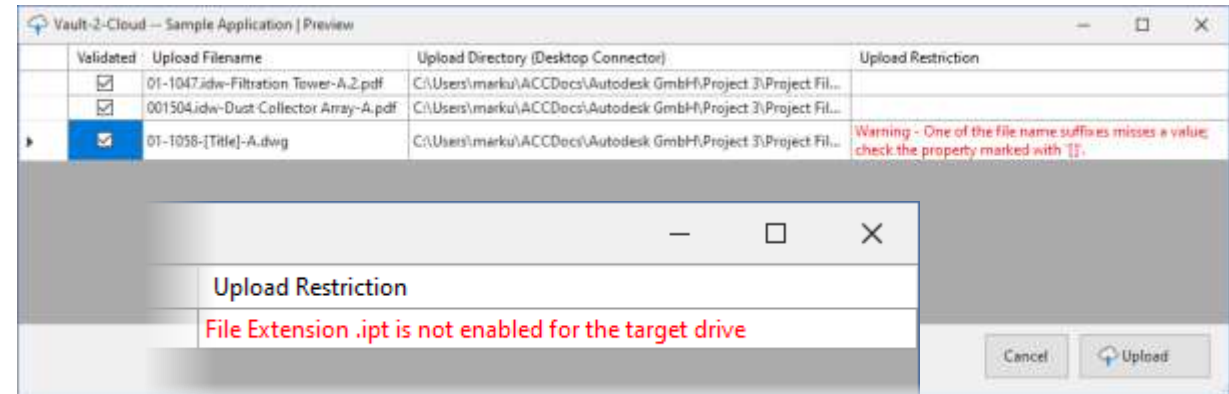
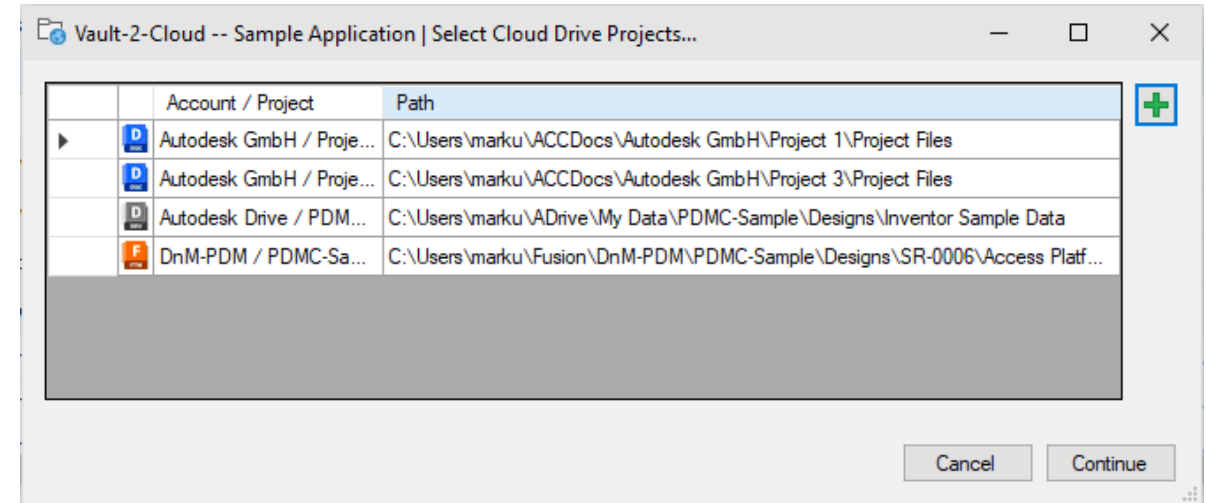
Not implemented as of now.

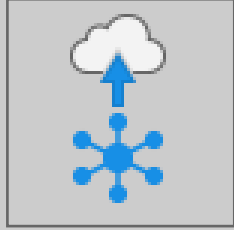


Solution Design

Client Extension Sample “User Cloud Upload”

- Pre-Checks and rules
 - Remove illegal (filename) characters from property values included in file names
 - Max. full file name length 256 characters
 - Warning for missing property values included in file names
 - Error if the target drive not found or invalid
 - User-selected target: only Drive, Docs, and Fusion are valid selections and added to the upload projects list
 - Drive – don’t allow the root “My Data” (selectable in Desktop Connector)
 - Fusion – the naming convention is different to Docs – use the Fusion Team name (= Fusion Project) as “Account” and the selectable subfolder as “Project”





 Upload to Cloud Project

 Upload to ...

Summary

Sample Application | Case Study

- Presented application is a sample
 - The idea arose from customer discussions
 - The customers hadn't been aware of Pack and Go targeting cloud drives
 - Pack and Go is a multi-step wizard and is open to access any target
- Consider this to kick off discussions if
 - ..Pack and Go is too flexible and open
 - ..the Project Sync administrator would need to configure too many projects
 - ..before you post an idea on Vault Idea Station

