

Autodesk Vault Essentials

This class covers all features in Autodesk® Vault for managing files and projects. Users learn how to organize and share files, manage file versions, work in multi-user environments, and integrate Autodesk Vault with various Autodesk products, including how to install and manage Autodesk Vault.

Duration

3 days

Typical Schedule

This class starts each day at 9:00 am and ends at 4:00 pm.

Prerequisites

No Data management experience necessary

A basic working knowledge of: Autodesk® Inventor® and/or AutoCAD® Mechanical, AutoCAD® Electrical, or AutoCAD® Civil 3D®.

Proficient with Microsoft® Windows®

Topics Covered

- About Vault
 - Autodesk Data Management Server
 - Vault Clients
 - A Typical Workflow
- Accessing the Vault
 - Vault Clients
 - Vault Add-ins
 - Logging in to Vault
- Vault User Interface
 - Vault Explorer UI
 - Navigation Pane
 - Main Pane
 - Preview Pane
 - Shortcuts and Saved Searches
- Working with Files and the Vault
 - Folder Structure
 - Adding Files
 - Working on Files
 - File Status
 - Versions of Files
- Adding Inventor Models to a Vault
 - How Autodesk Inventor Files Are Organized
 - Autodesk Autoloader
 - Adding Inventor Files to a Vault
- Common Vault Tasks in Inventor
 - Typical Edit Workflow
 - Getting Files from a Vault
 - Editing Inventor Files
 - Saving Files to a Vault
- Working with Vault in Inventor
 - Placing Files from a Vault
 - Updating Parent Files
 - Adding a New Design
 - Streamlining Vault Workflows
- Working with AutoCAD Files
 - Typical Workflow for AutoCAD and Vault
 - Use a Shared Workspace
 - Check In and Check Out Drawings
 - Open from Vault
 - Attach from Vault
- Working with External References in AutoCAD
- Working with AutoCAD Electrical Files
 - Opening and Accessing
 - Typical Workflow
 - Use a Shared Workspace
 - Check In Projects and Drawings
 - Open from Vault
 - Attach from Vault
- Working with AutoCAD Mechanical Files
 - Opening and Accessing
 - Typical Workflow
 - Use a Shared Workspace
 - Check In and Check Out Drawings
 - Open from Vault
 - Attach from Vault
- Working with External References in AutoCAD Mechanical
- Customizing Views
 - Customizing the Panes
 - Viewing File Properties
 - Saving Customized Views
- Finding Files
 - Basic Find
 - Advanced Find
 - Using Search
 - Defining Custom Filters
 - Saving Searches
 - Shortcuts
- Managing Versions
 - File Versions
 - Viewing File History
 - Getting a Previous Version
 - Getting the Latest Version
 - Reverting to a Previous Design
 - Labeling Designs
- Renaming and Moving Files
 - File Dependencies and Vault
 - Renaming Files
 - Moving Files
- Reusing Designs
 - About Copy Design
 - Using Copy Design
- Using Vault Files Outside of the Vault Environment
- Managing Properties
 - Viewing Properties
 - Editing File Properties
- Replacing Files
- How Inventor Files are Organized
 - About Project Files
 - About Model Files
 - About Library Files
 - About Content Center Files
 - Adding Existing Models to a Vault
 - Preparing Models
 - Uploading Models
- Setting Up Vault
 - Components of Autodesk Vault

- Creating Vaults
 - Setting the Environment
 - Visualization Publishing Options
- Managing Users and Access
- Managing File Properties
 - Renaming Properties
 - Changing Property States
 - Mapping Properties
 - Adding AutoCAD Attributes
- Adding Other Properties
 - Re-Indexing Vault Databases
- Backing Up and Restoring Vaults
- Maintaining Vault
 - Viewing Vault Statistics
 - Purging Versions
 - Tracking File Status
 - Indexing File Contents

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