

Autodesk Vault – Essentials for Users

This course is a basic introduction to Autodesk Vault Data Management components, workflows and interfaces elements for end users. It is designed for those users who will be consuming and interacting with “Vaulted Content” in a managed multi-user environment.

After completing this course, students will understand the basic concepts of Autodesk Vault for data management, and be able to interact with Autodesk Vault systems in the workplace.

Who should attend?

This course has been designed for professionals who, will be expected to interact with an Autodesk Vault system, as part of their daily duties in the workplace. The topics are applicable to all audiences and position; however, some aspects of this training will target users accessing Vault from within other Autodesk design applications.

Prerequisites

This course assumes no prior knowledge of Autodesk Vault, however to get the most from it, students should be comfortable using a recent version of AutoCAD and Autodesk Design Review software, and working in a modern Microsoft Windows environment.

Questions?

Please call us at 800-336-3375.

Course Outline

The Vault Components: Vaulted Data Workflow Overview and Accessing Vaulted Data

- Introduction to the Vault Client
- Overview Vault (Application) Plug-Ins
- The Vault User Profile
- Logging in for the First Time

The Vault Client Interface

- Vault Client UI
- Project Explorer
- Custom Views
- Find & Advanced Search
- Saved Searches

Managed Data Concepts

- Setting the “Working Folder” & Workspace Synchronization
- File Versions & History
- File Status
- File Check-In/Check-Out
- Release Biased

Working with Projects, Folders, and Files

- Building Folder Structures
- Adding Files to Vault
- Getting the Latest Version & Release Biased Versions
- Getting Previous File Versions
- Renaming & Moving Vaulted Files
- Replacing Files
- Setting Vault Labels

Introduction to Properties and Metadata

- Properties & Data Types
- System Properties
- Creating Additional Properties
- Editing Properties
- Re-Indexing Vaulted File Properties
- Vault Context Indexing

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Working with Vault and the AutoCAD Plug-In

- Private vs Shared Workspaces
- Unique Filenames & Design File Check-In Options
- Logging into Vault
- Check-In/Check-Out of Design Drawings
- Opening Vaulted Drawings
- Working with External References
- Attaching Vaulted Drawings

AutoCAD Properties and Metadata

- AutoCAD Attributes and Indexing
- Custom Drawing File Properties
- AutoCAD Fields and Vault Properties
- Property Mapping

Digital Review and DWF Redlines

- The Digital Review Workflow
- Design Review & AutoCAD Working Together
- Creating DWF Files
- Redline of DWFs with Design Review
- Underlay of Vaulted DWFs in AutoCAD
- Communication and Notification in the Review Process
- Sending/Receiving Links to Vaulted Documents
- Vault Design Visualization Settings

Accounts & Access

- Adding Users & Groups
- Sorting by Access
- Assigning ROLES, Groups, and Vaults
- Disabling Access
- Importing from Promote to Domain
- Vault ACL Security Overview

Vault & MS Office

- Vault MS Office COM Add-On
- The Vault Ribbon
- Opening Vaulted Documents
- File Check-In/Check-Out Defaults

Vault Thin-Client (Browser Based Access)

- Accessing the Vault URL & Log-In
- Finding Files
- Downloading Documents