

## Technical Education Services

### Autodesk Vault Professional Data Management for Autodesk Inventor Users

**Course Length: 1 day**

Autodesk Vault Professional Data Management for Autodesk Inventor Users introduces the Autodesk Vault Professional software to Autodesk Inventor users. This training course is intended for Autodesk Inventor users who need to access their design files from the Autodesk Vault software. It provides an introduction to the Autodesk Vault Professional software and focuses on Autodesk Vault's features for managing design projects with the Autodesk Inventor software from a user's perspective.

Note that this course does not cover administrative functionality. Hands-on exercises are included to reinforce how to manage the design workflow process using the Autodesk Vault Professional software. Included with this course is a training Vault that can be used alongside a production Vault, to ensure that both Vaults can be accessed from the Autodesk Vault software.

#### Topics Covered

- Introduction to Autodesk Vault Features
- Using the Autodesk Vault client
- Searching the Vault
- Working with non-CAD files in the Vault
- Working with Inventor files in the Vault
- Customizing the user interface
- Data management and reusing design data
- Items and bills of materials
- Change management

#### Prerequisites

Good working knowledge of the Autodesk Inventor software.

*Course description shown for Autodesk Vault Professional 2021. Topics, curriculum, and/or prerequisites may change depending on software version.*



## Training Guide Contents

### Chapter 1: Introduction to Autodesk Vault

- 1.1 Autodesk Vault Features
- 1.2 Terms and Definitions
- 1.3 Accessing Autodesk Vault

### Chapter 2: Orientation to Autodesk Vault

- 2.1 Logging In to the Autodesk Vault Client
- 2.2 Folder Structure
- 2.3 Autodesk Vault Interface Overview
- 2.4 Navigation Pane
- 2.5 Main Table
- 2.6 Preview Pane
- 2.7 Properties Grid
- 2.8 Toolbars
- 2.9 Adding Non-CAD Files to the Vault

### Chapter 3: Orientation to the Autodesk Inventor Vault Integration Add-in

- 3.1 Autodesk Vault Projects
- 3.2 Mapping Folders
- 3.3 Log In to Vault from Autodesk Inventor
- 3.4 Open Autodesk Inventor Files from the Vault
- 3.5 Check File Status with Vault Browser
- 3.6 Check In Autodesk Inventor Files to the Vault

### Chapter 4: Searching the Vault

- 4.1 Overview of Search Methods
- 4.2 Browsing Folder Structure
- 4.3 Quick Search
- 4.4 Basic Find
- 4.5 Advanced Find
- 4.6 Saving Searches
- 4.7 Reports

### Chapter 5: Working with Non-CAD Files

- 5.1 Get and Check Out
- 5.2 Undo Check Out
- 5.3 Modifying Non-CAD Files
- 5.4 Check In
- 5.5 File Versions
- 5.6 Managing Prompts and Dialog Boxes
- 5.7 File Status

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## Chapter 6: Working with Autodesk Inventor CAD Files

- 6.1 Check Out Autodesk Inventor Files
- 6.2 Undo Check Out in Autodesk Inventor
- 6.3 Modifying Autodesk Inventor Files
- 6.4 Check In Autodesk Inventor Files
- 6.5 Get Previous Versions
- 6.6 Changing Lifecycle States and Next Release/Revision Procedures
- 6.7 Get Revision
- 6.8 Vault Revision Tables
- 6.9 Creating PDFs
- 6.10 Find Duplicates and the Duplicates Dashboard
- 6.11 Managing Prompts and Dialog Boxes

## Chapter 7: Customizing the User Interface

- 7.1 Autodesk Vault Customization
- 7.2 Customizing Columns
- 7.3 Custom Views
- 7.4 Shortcuts

## Chapter 8: File and Design Management

- 8.1 Managing Data in the Vault
- 8.2 Properties
- 8.3 Labels
- 8.4 Rename Wizard
- 8.5 Replace Wizard
- 8.6 Pack and Go
- 8.7 Synchronize your Workspace
- 8.8 Copy Design

## Chapter 9: Items and Bill of Materials Management

- 9.1 Items and Bills of Materials
- 9.2 Creating Items and BOMs
- 9.3 Working with BOMs

## Chapter 10: Change Management

- 10.1 Change Order Object Overview
- 10.2 Change Order Process

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## Cancellation Policy

The following cancellation policy shall apply to all training engagements, Live Online, Consulting Services and Dedicated/Custom Training:

- Company reserves the right to reschedule or cancel the date, time and location of its class at any time. In the event that a Training Class is cancelled by Company, Customer is entitled to a full refund. Company shall not be responsible for any other loss incurred by Customer as a result of a cancellation or reschedule.
- For Customer cancellations when written notice is received (i) at least ten (10) business days in advance of the class, the Customer is entitled to a full refund of its payment or reschedule enrollment, (ii) less than ten (10) business days, Customer shall not be entitled to a refund, but shall receive a class credit to be used within three (3) months of the date of the original class.
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- For all Training orders, cancellation notices must be submitted to [trainingcoordinator@rand.com](mailto:trainingcoordinator@rand.com). Company is not responsible for any error in the delivery of the email notice. In the event of any reschedule of Consulting Services and/or Dedicated/Custom Training by Customer, Company will invoice Customer for all non-cancellable travel expenses.

To request more information or to see training locations, visit [www.imaginit.com/contact-us](http://www.imaginit.com/contact-us).

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