

Technical Education Services

Autodesk Vault Workgroup Essentials

Course Length: 3 days

The Autodesk Vault Workgroup Essentials training course expands the Autodesk® Vault Basic functionality to working with document lifecycles and providing knowledge of advanced data organization.

This training course is intended for users and CAD administrators with Autodesk Vault Basic knowledge who want to expand their skills to accommodate additional engineering workflows and data organization. This training course focuses on the features of Autodesk Vault Workgroup. Hands-on exercises are included to reinforce lifecycle and revision management. Users are taught how to manage lifecycles, properties, categories, and revisions.

Topics Covered

- Introduction to Autodesk Vault Workgroup
- Lifecycle States
- Revision Management
- Working with Categories
- Managing Properties
- Automatic File Naming
- Creating Reports
- Copy Design
- Job Server
- Vault Revision Table Administration

Prerequisites

You should have a good working knowledge of Autodesk CAD programs and have working knowledge of Autodesk Vault Basic features.

Course description shown for Autodesk Vault Workgroup 2019. Topics, curriculum, and/or prerequisites may change depending on software version.



Training Guide Contents

Chapter 1: Introduction to Autodesk Vault Workgroup

- Lesson 1: Autodesk Vault Workgroup Overview

Chapter 2: Lifecycle States in Autodesk Vault Workgroup

- Lesson 1: Lifecycle Definitions and States
- Lesson 2: Configuring Lifecycle States
- Lesson 3: Changing Lifecycle States

Chapter 3: Revision Management in Autodesk Vault Workgroup

- Lesson 1: Revision and Versions
- Lesson 2: Creating and Modifying Revision Schemes
- Lesson 3: Revising Files

Chapter 4: Categories in Autodesk Vault Workgroup

- Lesson 1: Categories and Rules
- Lesson 2: Managing Categories and Rules

Chapter 5: Managing Properties

- Lesson 1: System-Defined Properties vs. User-Defined Properties
- Lesson 2: The Properties Grid
- Lesson 3: Map Properties

Chapter 6: Automatic File Naming in Autodesk Vault Workgroup

- Lesson 1: Create Custom Numbering Schemes

Chapter 7: Creating Reports

- Lesson 1: Creating Reports
- Lesson 2: Creating Custom Report Templates

Chapter 8: Autodesk Inventor In-CAD Data Management

- Lesson 1: Working with Data Cards
- Lesson 2: Data Mapping and Report Generation
- Lesson 3: Sheet Set Manager Integration

Chapter 9: Copy Design, Job Server, Vault Revision Tables, and Backups

- Lesson 1: Copy Design
- Lesson 2: Enable the Job Server
- Lesson 3: Configuring the Job Server
- Lesson 4: Vault Revision Table Administration
- Lesson 5: Backup and Restore

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Cancellation Policy

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

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- 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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To request more information or to see training locations, visit www.imaginit.com/contact-us.

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