

**Course Title: Vault Professional Introduction**

**Course Code: VLT-2P**

**Duration: 1 Day**

## Courseware Description

This training guide is designed to teach new users the essential elements of using Autodesk Vault Professional 2012.

## Objectives

Upon completion of the course, students will be able to:

- Introduction to Autodesk Vault Professional
- Working with Items
- Managing Change
- Working with Bills of Material
- Administering Autodesk Vault Professional
- Reporting

## Prerequisites

It is recommended that you have a working knowledge of Autodesk Vault and also the following products: Microsoft® Office, Autodesk Inventor, AutoCAD, Microsoft® Windows® 7, Microsoft® Windows® XP

## Course Outline

### **Introduction to Autodesk Vault Professional**

#### Autodesk Vault Professional Overview

- About Autodesk Vault Professional
- Autodesk Vault Professional Functions
- Security and Users in Vault Professional
- Integration with Other Products

#### User Interface

- User Interface Elements
- About the Navigation Pane
- About the Main Pane
- About the Edit Item Record Dialog Box

### **Working with Items**

#### Creating Items

- About Items
- Item Master
- Creating Items
- Attaching and Detaching Files
- Automatic Attachments

#### Working with Items

- Using Item Preview Pane to View Items
- Using the Where Used Tab
- How to Define Custom Filter to View Items
- How to Customize Column Display in the Item Master
- How to Find Items

#### Item Properties

- Default Item Properties
- User Defined Item Properties
- Item Number Schemes
- Item Lifecycle States
- Item Revisions

#### Exporting Items

- Item and ERP Systems
- Export Items from Vault Professional

### **Managing Change**

#### Revision Control

- Item Life cycle States
- Controlling Lifecycle States
- Changing States Manually

#### Change Orders

- Introduction to Change Orders
- Create a Change Order
- Change Orders and Item Revisions
- Change Orders and Lifecycle States
- Identifying Change Order Participants

### **Working with Bills of Material**

#### Bills of Material

- About BOMs
- Editing a BOM
- Comparing BOMs
- BOM Output

#### Integration with Autodesk Inventor

- About Inventor, Vault, and Vault Professional Integration
- Inventor BOMs
- Virtual Components
- Modifying Content Center Component Properties
- Working with DWG Files

### **Administering Autodesk Vault Professional**

#### Configuring Items

- Units of Measure
- Item Categories
- Item Numbering Schemes
- Configure Item Lifecycle Settings
- Item Revision Schemes
- Configuring Visualization Watermarking

#### Configuring Change Orders

- Change Order Options
- Configuring a Markup Folder
- Link Properties
- Change Order Numbering
- Routing Definition - Workflow Selection
- Routing Definition - Change Order Routing List
- Configure Email Notification

### **Reporting**

#### Creating Reports

- About Reports
- Report Templates
- Microsoft Report Viewer
- Creating Search Reports
- Creating Vault Project Reports