

**Course Title:** Introduction to Vault Workgroup and Vault Collaboration

**Course Code:** VLT-2WC

**Duration:** 2 Days

## Courseware Description

Autodesk Vault Workgroup and Collaboration provides product lifecycle management to your designs. A common interface provides access to files, folders, revisions, and categories.

## Objectives

- Introduction to Autodesk Vault Workgroup and Autodesk Vault Collaboration
- Lifecycle States
- Revision Management
- Working with Categories
- Managing Properties
- Automatic File Naming
- Creating Reports
- Job Server
- Web Client

## Prerequisites

- Students should have completed the **Autodesk Vault Introduction (VLT-1)** course or have equivalent experience using Vault.

It is recommended that you have a working knowledge of:

1. The following products:
  - Microsoft® Windows® 7, Vista or XP
  - Microsoft® Office
2. And one or more of the following Autodesk Products
  - Autodesk Inventor, AutoCAD, AutoCAD Electrical or AutoCAD Mechanical

## Course Outline

### **Introduction to Vault Workgroup and Vault Collaboration**

#### *Autodesk Vault Workgroup and Collaboration Overview*

- File Status
- Manage Files – Projects Feature
- Links

### **Lifecycle States in Vault Workgroup**

#### *Lifecycle Definitions and States*

- Lifecycle Definitions
- Viewing Lifecycle Definitions
- Creating a New Lifecycle Definition

#### *Configuring Lifecycle States*

- Setting Up
- Security
- Transitions
- Other Configuration Settings

#### *Changing File Lifecycle States*

- Change State

### **Revision Management in Vault Workgroup and Collaboration**

#### *Revision and Versions*

- Concept
- Default Revision Schemes and Scheme Formats

#### *Creating and Modifying Revision Schemes*

- Revision Scheme and Revision Formats
- Modifying an Existing Revision Scheme

#### *Revising Files*

- Revise File
- Revision Controlled Documents
- Revisions and Lifecycles
- Revise Command

### **Categories in Vault Workgroup and Vault Collaboration**

#### *Categories and Rules*

- Categories
- Change Category
- Rules

#### *Managing Categories and Rules*

- Managing Categories

### **Managing Properties**

#### *System Defined properties vs User-Defined properties*

- Learn About Terms, Data Types, and Attributes
- Introduction to the Property Definitions Dialog Box
- Change the State
- Examining Usage Count
- Add or Remove a User-Defined Property

#### *The Properties Grid*

- Hide/Restore Properties
- Edit Properties from the Grid

#### *Map Properties*

- Mapping Priority
- Mapping
- Mapping Across Data Types
- Create Option
- Mapping AutoCAD Block Attributes
- AutoCAD Mechanical
- AutoCAD Electrical

### **Automatic File Naming in Vault Workgroup and Collaboration**

#### *Create Custom Numbering Schemes*

- Define Numbering Schemes

### **Creating Reports**

#### *Creating Reports*

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

#### *Creating Custom Report Templates*

- Introduction to Autodesk Template Authoring Utility
- Creating a New Report Template
- Including Non-Property Vault Data in a Report

### **Inventor In-CAD Data Management**

#### *Working with Data Cards*

- About Data Card Views
- Understanding Data Card Decks
- Editing Properties with Data Cards
- Working with Value Collectors
- Managing the Data Card Layout

#### *Data Mapping and Report Generation*

- Introduction to the Data Mapping
- Mapping Your Data
- Creating Reports for Your Model
- Managing Chart Elements
- Managing Reports

### **Job Server in Vault Workgroup and Vault Collaboration**

#### *Enable the Job Server*

- Job Server vs Job Processor
- Enable Job Server
- Job Processor
- Job Server Queue
- Initiate a Job

#### *Configuring the Job Server*

- Configuration via Job Processor UI
- The Configuration File
- The LifeCycleEventEditor
- Log File

### **Web Client**

#### *Getting Started with the Web Client*

- Configure the Browser settings
- Log in /out
- Printing
- Searching
- Configure Display Settings
- Modify Active Content Search

#### *Working with Files*

- Files Navigation Pane
- Viewing the Files List
- Files Detail

#### *Working with Items*

- Viewing the Items List
- Items Details
- BOM

### **Managing your Vault**

#### *Active Directory*

- Managing Groups
- Import an Active Directory domain user account
- Import an Active Directory domain group

#### *Backup and Restore*

- Backup the Vault
- Restore the Vault
- Backup Vault Data