

Autodesk®
Vault 2009

Essentials

Autodesk Official Training Courseware (AOTC)

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Introduction

Welcome to the *Autodesk Vault 2009: Essentials* Autodesk Official Training Courseware (AOTC), training courseware for use in Authorized Training Center (ATC®) locations, corporate training settings, and other classroom settings.

Although this courseware is designed for instructor-led courses, you can also use it for self-paced learning. The courseware encourages self-learning through the use of the Autodesk® Vault Help system.

This introduction covers the following topics:

- Course objectives
- Prerequisites
- Using this courseware
- CD contents
- Completing the exercises
- Installing the exercise data files from the CD
- Course and classroom setup
- Notes, tips, and warnings
- Feedback

This courseware is complementary to the software documentation. For detailed explanations of features and functionality, refer to the Help in the software.

Course Objectives

After completing this course, you will be able to:

- Describe the features and functionality of Autodesk Vault.
- Log in to Vault and work with non-CAD files and the vault using Autodesk Vault and the Vault add-in for Microsoft Office.
- Add existing Autodesk® Inventor® models to a vault and how to work with Inventor files from the vault.
- Add existing AutoCAD® drawings to a vault and work with AutoCAD files from the vault.
- Add an AutoCAD® Electrical project to a vault and work with AutoCAD Electrical files from the vault.
- Add existing AutoCAD® Mechanical drawings to a vault and work with AutoCAD Mechanical files from the vault.

- Add existing AutoCAD® Civil 3D® drawings and projects to a vault and work with AutoCAD Civil 3D files from the vault.
- Perform common everyday tasks using Autodesk Vault.
- Organize Autodesk Inventor files for best results with Vault.
- Set up Vault, manage users and file properties, and back up and restore your vaults.

Prerequisites

This course is designed to teach new users the essential elements of using Autodesk Vault 2009 for managing files and projects.

The primary focus of this courseware is on using Autodesk Vault with Autodesk Inventor. The courseware also includes lessons on working with other products such as AutoCAD, AutoCAD Mechanical, AutoCAD Electrical, and AutoCAD Civil 3D.

It is recommended that you have a working knowledge of one or more of the following products:

- Microsoft Office
- Autodesk Inventor 2009
- AutoCAD 2009
- AutoCAD Mechanical 2009
- AutoCAD Electrical 2009
- AutoCAD Civil 3D® 2009
- Microsoft® Windows® XP or Microsoft® Windows® Vista

Using This Courseware

The lessons are independent of each other. However, we recommend that you complete these lessons in the order that they are presented unless you are familiar with the concepts and functionality described in those lessons.

Each chapter contains:

- **Lessons**
Usually two or more lessons in each chapter.
- **Exercises**
Practical, real-world examples for you to practice using the functionality you have just learned. Each exercise contains step-by-step procedures and graphics to help you complete the exercise successfully.

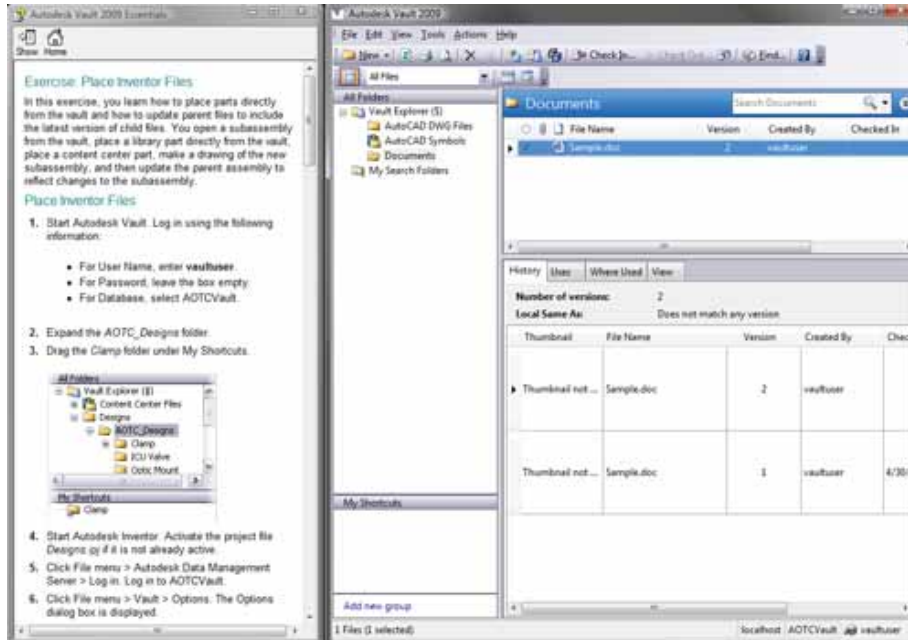
CD Contents

The CD attached to the back cover of this book contains all the data and drawings you need to complete the exercises in this course.

Completing the Exercises

You can complete the exercise in two ways: using the book or on screen.

- **Using the book** – Follow the step-by-step exercises in the book.
- **On screen** – Click the AOTC - Autodesk Vault 2009 Essentials icon on your desktop, installed from the CD, and follow the step-by-step exercises on screen. The onscreen exercises are the same as those in the book. The onscreen version has the advantage that you can concentrate on the screen without having to glance down at your book.



After launching the onscreen exercises, you might need to alter the size of your application window to align both windows.

Installing the Exercise Data Files from the CD

To install the data files for the exercises:

1. Insert the courseware CD.
2. When the setup wizard begins, follow the instructions on screen to install the data.
3. If the wizard does not start automatically, browse to the root directory of the CD and double-click *Setup.exe*.

Unless you specify a different folder, the exercise files are installed in the following folder:

C:\AOTCVault

After you install the data from the CD, this folder contains all the files necessary to complete each exercise in this course.



The files in the dataset are designed to run from the default installation folder. If you install the datasets to a different location, you may experience problems in some exercises.

Course and Classroom Setup

Introduction

Before you start the course, you must install Autodesk Vault and the course data sets.

Installation Scenarios

You must install and run this courseware from individual computers. You cannot run the courseware from a shared server. Do not install the courseware on a computer that stores your working vault data.

Overview of Installing the Courseware

The following steps describe how to install the courseware.

1. Install Autodesk Vault and Autodesk Data Management Server Console on each computer.
2. Install the course data sets on each computer.
3. If Autodesk Vault has been previously used on the computer, restore default settings for the user interface.

Installing Autodesk Vault

Install both Autodesk Vault and Autodesk Data Management Server Console on each computer. See the Autodesk Vault installation media for installation instructions. If you have previously installed Autodesk® Productstream® on a computer, you must remove Autodesk Productstream and Autodesk Data Management Server Console (Productstream) before installing Vault and ADMS for vault.

For normal use, you must install Microsoft Internet Information Server (IIS) before installing Autodesk Data Management Server Console. Because the course is designed to run on individual computers, you can use the Autodesk Personal Web Server, which is installed automatically during installation if you choose not to use IIS.

Course Setup Information

By default, the data files for each exercise are placed in the *C:\AOTCVault* folder. Be aware that if you select a different installation location, you may need to manually edit some of the supplied project files to modify their library search paths. These folders contain parts, assemblies, drawing library files, and other files required by the exercises.

The exercises are designed to be used back-to-back from start to finish. It is recommended that you log in to Autodesk Vault at the beginning of each exercise and when finishing an exercise, you should exit Autodesk Vault. The chapter folders contain subfolders holding documents for the chapter exercises.

If you are using any of the following Autodesk® software applications in conjunction with Autodesk Vault, they must be installed before installing Autodesk Vault:

- Autodesk Inventor 2009
- AutoCAD 2009
- AutoCAD Mechanical 2009
- AutoCAD Electrical 2009
- AutoCAD Civil 3D 2009

Classroom Environment

The courseware is intended for use in an instructor-led environment. If you plan to use the courseware on your own in a non-classroom environment, you must set up Autodesk Vault correctly. Before you set up your system, you should be aware of the following:

- Do not use a production vault for the exercises. It is recommended that you set up a separate vault on a separate vault server.
- If you plan to repeat an exercise, you must remove any files that were added to the vault when you previously completed the exercise. It is recommended that you delete the entire vault and start again with a new vault.
- Do not attempt these exercises on a production vault server until you are familiar with the procedures that are covered.



Warning!

If you have installed AutoCAD or AutoCAD based products after installing the Autodesk Data Management Server, you may need to 'repair' the Autodesk Data Management Server installation using Add/Remove programs. If you have not run the repair, you may see different results when working with some of the exercises.

Setting up the Course

Before you start any exercise, you need to perform the basic setup for this course. You must:

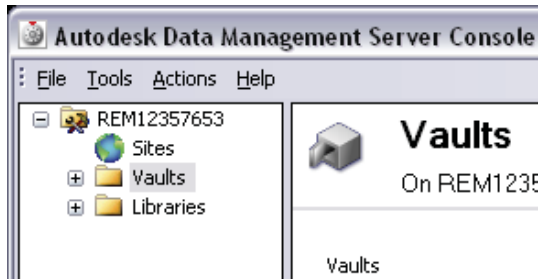
- Create a vault
- Add a user

Note: You must have Autodesk Vault installed.

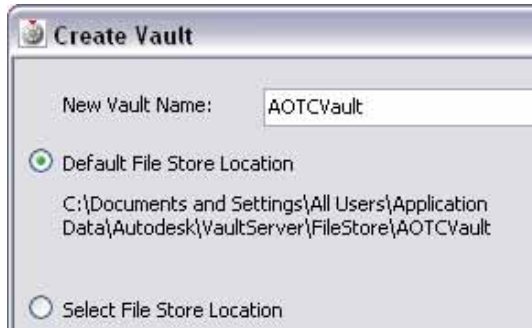
Create a Vault

1. Click Start menu > All Programs > Autodesk > Autodesk Data Management > Autodesk Data Management Server Console 2009.
2. In the Log In dialog box:
 - For User Name, enter **administrator**.
 - Leave Password blank.
 - Click OK.

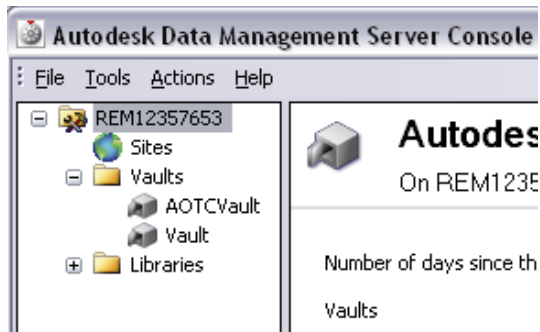
Autodesk Data Management Server Console 2009 is displayed.



3. Right-click Vaults. Click Create.
4. In the Create Vault dialog box, in New Vault Name, enter **AOTCVault**. Click OK.



5. Click OK. The vault is added to the list of vaults.



Add a User

1. Click Tools menu > Administration.
2. On the Security tab, click Users.
3. In the User Management dialog box, click New User.
4. In the New User dialog box, enter the following information:
 - In First Name, enter **Vault**.
 - In Last Name, enter **User**.
 - In User Name, enter **vaultuser**.
5. Leave Password and Confirm Password blank.
6. Click Roles.
 - In the Add Roles dialog box, select **Vault Editor**.
 - Click OK.
7. Click Vaults.
 - Select **AOTCVault** for the user, and then click OK.
 - Make sure that Enable User is checked.
 - Click OK.



The screenshot shows the 'New User' dialog box with the following fields and values:

Field	Value
First Name	Vault
Last Name	User
User Name	vaultuser
Email	
Password	
Confirm Password	

Below the fields, there are three buttons: Roles..., Vaults..., and Groups... To the right of these buttons, the following roles and vaults are listed:

Role/Vault
Vault Editor
AOTCVault

At the bottom, the 'Enable user' checkbox is checked.

8. Close the New User dialog box.
9. Click Close to return to Autodesk Data Management Server Console 2009.
10. Exit Autodesk Data Management Server Console 2009.

Course Workflow

The following table outlines dependencies between course exercises. Exercises in some chapters can be completed without first completing exercises in previous chapters.

Chapter	Exercises
Introduction	You must complete the setup instructions in this chapter. No exercises are included in this chapter.
Chapter 1: Introduction to Autodesk Vault	No exercises are included in this chapter.
Chapter 2: Basic Vault Tasks	The exercises in this chapter are the first course exercises. You must complete the exercises in the order they are presented.
Chapter 3: Working with Vault and Autodesk Inventor	It is recommended that you complete the exercises in this chapter after completing the exercises in the Basic Vault Tasks chapter. If you choose to complete the exercises in this chapter without completing the previous exercises, some screen captures in the exercises will differ from your views of files in the vault.
Chapter 4: Working with Vault and AutoCAD	It is recommended that you complete the exercises in this chapter after completing the exercises in the Working with Vault and Autodesk Inventor chapter. If you choose to complete the exercises in this chapter without completing the previous exercises, some screen captures in the exercises will differ from your views of files in the vault.
Chapter 5: Working with Vault and AutoCAD Electrical	It is recommended that you complete the exercises in this chapter after completing the exercises in the Working with Vault and Autodesk Inventor chapter. If you choose to complete the exercises in this chapter without completing the previous exercises, some screen captures in the exercises will differ from your views of files in the vault.
Chapter 6: Working with Vault and AutoCAD Mechanical	It is recommended that you complete the exercises in this chapter after completing the exercises in the Working with Vault and Autodesk Inventor chapter. If you choose to complete the exercises in this chapter without completing the previous exercises, some screen captures in the exercises will differ from your views of files in the vault.
Chapter 7: Working with Vault and AutoCAD Civil 3D	It is recommended that you complete the exercises in this chapter after completing the exercises in the Working with Vault and Autodesk Inventor chapter. If you choose to complete the exercises in this chapter without completing the previous exercises, some screen captures in the exercises will differ from your views of files in the vault.
Chapter 8: Common Vault Tasks	You must complete the exercises in the Working with Vault and Autodesk Inventor chapter before you can complete the exercises in this chapter.

Chapter

Exercises

Chapter 9: Organizing and Populating a Vault

You can complete the exercises in this chapter without completing previous course exercises.

Chapter 10: Managing Vault

You can complete the exercises in this chapter without completing previous course exercises. Some screen captures may differ slightly from your view of files in the vault.

Notes, Tips, and Warnings

Throughout this courseware, notes, tips, and warnings are called out for special attention.



Notes contain guidelines, constraints, and other explanatory information.



Tips provide information to enhance your productivity.



Warnings provide information about actions that might result in the loss of data, system failures, or other serious consequences.

Feedback

We always welcome feedback on Autodesk Official Training Courseware. After completing this course, if you have suggestions for improvements or if you want to report an error in the book or on the CD, please send your comments to AOTC.feedback@autodesk.com.

