

Product Design Suite 2013

Documentation and Data Management

Exercise: Data Management with Autodesk Vault

In this exercise, you use Autodesk® Vault Basic to manage and track the changes to your design files. You use Autodesk® Inventor® software to check out, modify, and check in the required design files.

To complete the steps in this hands-on test drive you will need Autodesk® Product Design Suite 2013 including Autodesk Vault Basic. If you are not currently a user, [click here](#) to download your free, 30-day trial of Autodesk® Product Design Suite Ultimate.

To install Autodesk® Vault Basic Server, you access its install option from the Install Tools & Utilities section of the suite installation dialog box.



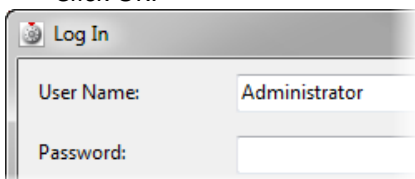
Restore a Vault

To perform this exercise, you must first restore the vault included in the supplied dataset. This section of the exercise walks you through restoring the supplied Vault Basic vault.

1. Click Start > All Programs > Autodesk > Autodesk Data Management > Autodesk Data Management Server Console 2013.



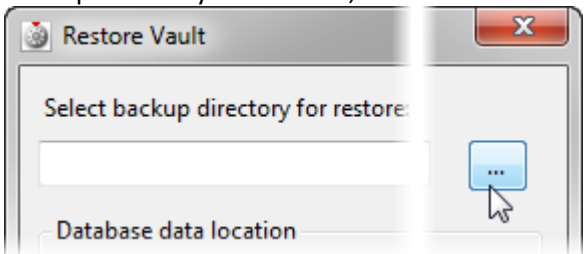
2. In the Log In dialog box:
 - Ensure the User Name is Administrator and there is no password.
 - Click OK.



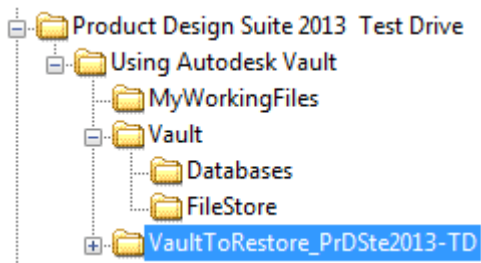
3. Back up your current vault if you have configured and populated a vault, otherwise continue to the next step.
Note: To keep the dataset as small as possible, and since Content Center libraries are not accessed in the demonstration, the vault you restore does not include vaulted Content Center Libraries. So if you have libraries in your original vault configuration, unless you back the libraries up, they won't be available in any future restores.

To back up the vault:

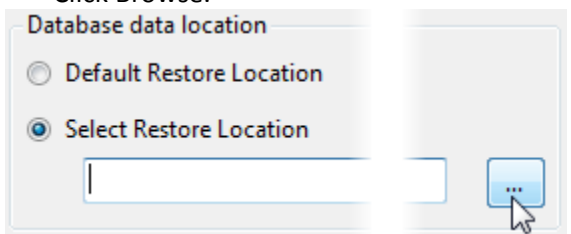
- Click the Tools menu > Backup.
 - In the Backup Vault dialog box, specify the location of the folder where you want to save the backup files.
 - Select the Validate the Backed Up Files check box.
 - Select the Backup Standard Content Center Libraries check box.
4. To begin to restore the vault for this exercise:
 - Click Tools menu > Restore.
 - In the message box, click Yes.
 5. In the Restore Vault dialog box, under Select Backup Directory for Restore, click Browse.



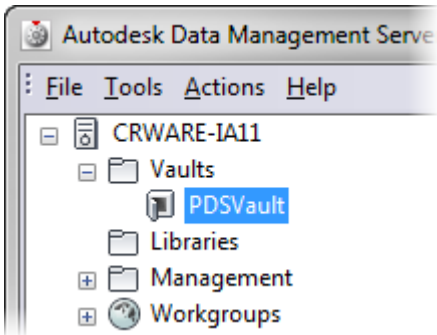
6. In the Browse for Folder dialog box:
 - Navigate to where the dataset was installed and select the `.\VaultToRestore_PrDSte2013-TD` folder.
 - Click OK.



7. In the Database Data Location area:
 - Click Select Restore Location.
 - Click Browse.



8. In the Browse for Folder dialog box:
 - Navigate to where the dataset was installed and select the `.\Vault\Databases` folder.
 - Click OK.
9. In the File Store Location area:
 - Click Select Restore Location.
 - Click Browse.
10. In the Browse for Folder dialog box:
 - Navigate to where the dataset was installed and select the `.\Vault\FileStore` folder.
 - Click OK.
11. In the Restore Vault dialog box, click OK.
12. In the message dialog box, click OK.
13. Review the listed vault.



14. Close Autodesk Data Management Server Console.

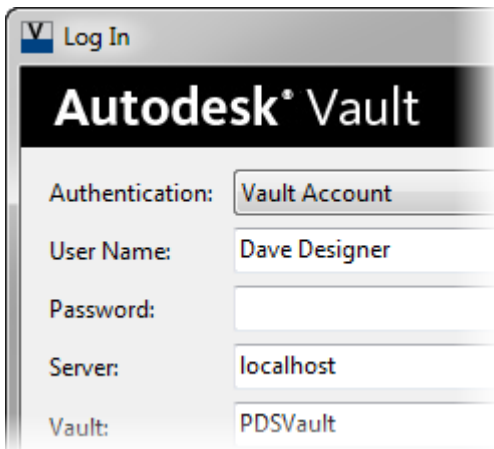
Set Up Autodesk Vault

In this section of the exercise, you specify the location on your local computer where files should be copied to when they are checked out of the vault. You also copy out the Inventor project file from the vault.

1. Start Autodesk Vault Basic.

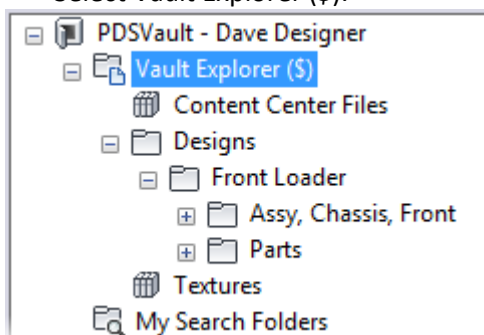


2. In the Log In dialog box:
 - For User Name, enter **Dave Designer**.
 - Leave Password blank.
 - For Vault, select PDSVault.
 - Click OK.



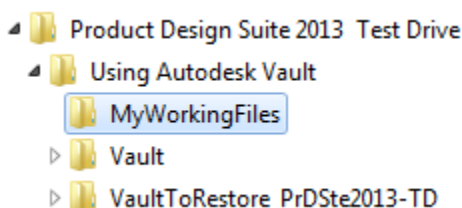
3. In Autodesk Vault, in the navigation pane:

- Expand the contents of the vault.
- Select Vault Explorer (\$).



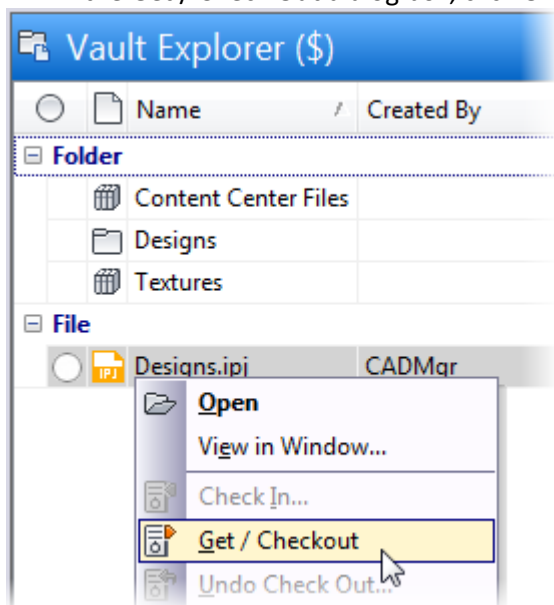
4. To set the folder where vaulted files will be checked out to:

- Click File menu > Set Working Folder.
- In the Browse for Folder dialog box, navigate to where the dataset was installed and select the *.\Using Autodesk Vault\MyWorkingFiles* folder.
- Click OK.

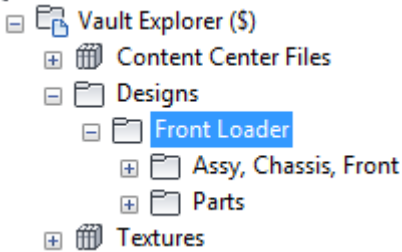


5. To copy out the Inventor project file:

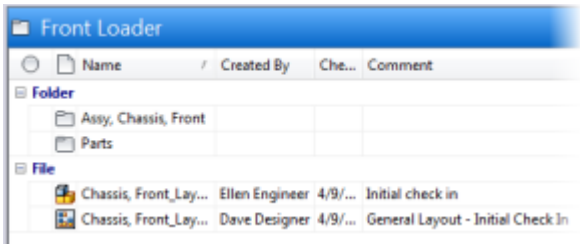
- In the main pane, right-click Designs.ipj. Click Get / Checkout.
- In the Get / Check Out dialog box, click OK.



6. In the navigation pane, select Front Loader.



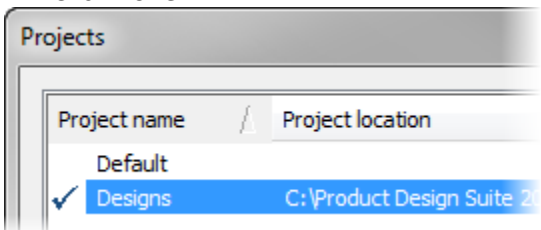
7. In the main pane, review the list of files that are checked in to this vault folder. They were added to the vault by different users with comment information.



Modify a Vaulted Inventor Design

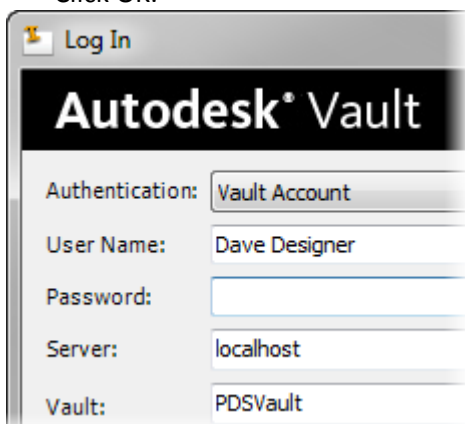
In this section of the exercise, you use Autodesk Inventor to modify a design and Autodesk Vault Basic to manage the design files and revisions.

1. Start Autodesk Inventor.
2. To begin to set the project file from the vault as the active project, on the Get Started tab, Launch panel, click Projects.
3. In the Projects dialog box:
 - Click Browse.
 - In the Choose Project File dialog box, navigate to and open *.\Using Autodesk Vault\MyWorkingFiles\Designs.ipj*.
 - In the Inventor message box, click Yes.
 - Ensure that Designs is the active project as shown.
 - Click Done.

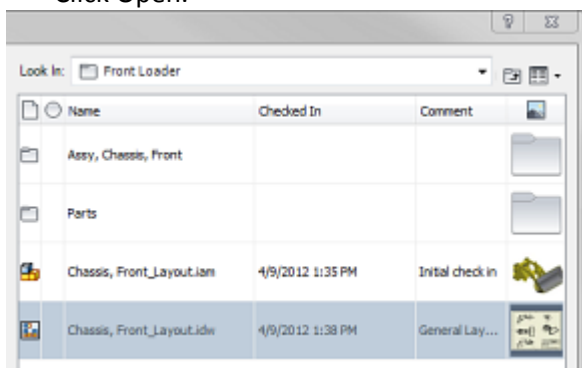


4. On the Vault tab, Access panel, click Log In.

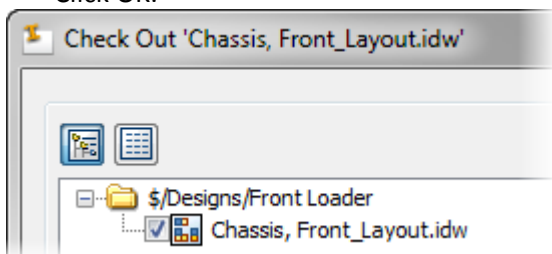
5. In the Log In dialog box:
- For User Name, enter **Dave Designer**.
 - Leave Password blank.
 - For Vault, select PDSVault.
 - Click OK.



6. To begin to open the drawing in Autodesk Inventor, on the Vault tab > Access panel, click Open.
7. In the Select File from Vault dialog box:
- Under Look In, double-click the Designs folder and then the Front Loader folder.
 - Select *Chassis, Front_Layout.idw*.
 - Click Open.



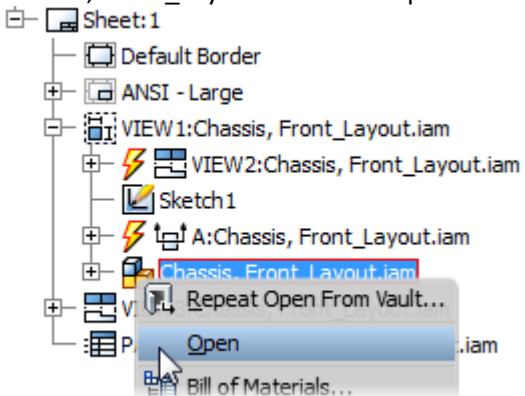
8. In the Vault dialog box, when prompted to check out the file, click Yes.
9. In the Check Out dialog box:
- Verify that the check box for the drawing is selected.
 - Click OK.



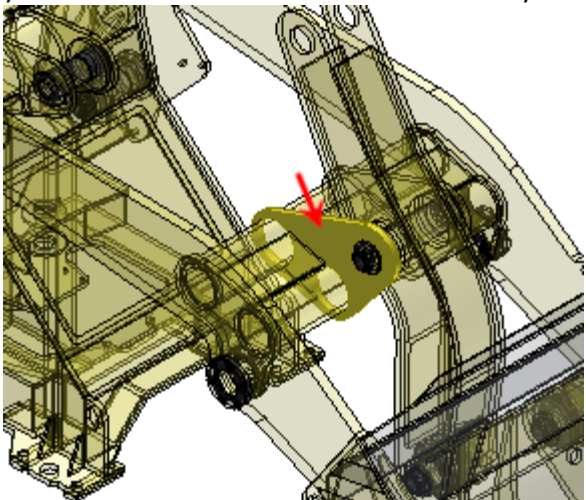
10. Review the Detail B drawing view and its parent view. This part is currently a solid plate with three holes in it.



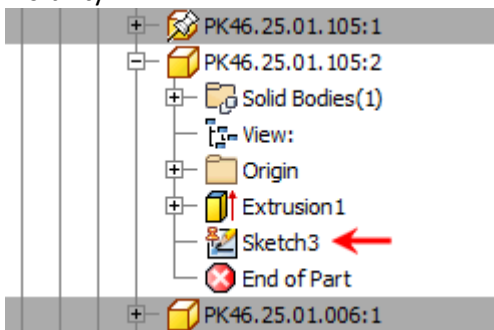
11. To open the assembly file for editing and check it out, in the browser, under View 1, right-click Chassis, Front_Layout.iam. Click Open.



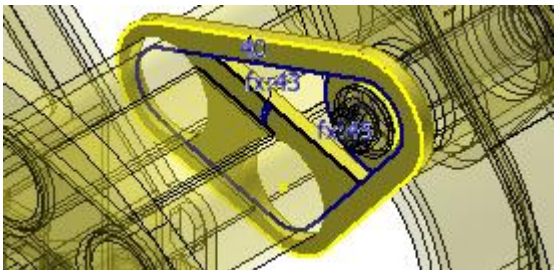
12. In the message box regarding updating the assembly, click Yes.
13. In the message box asking if you want to check out Chassis, Front_Layout.iam, click Yes.
14. In the assembly, double-click the identified part until it is activated for in-place editing as shown. This part is nested in several layers of assemblies. Each time you double-click the part, you drill down to the next level subassembly.



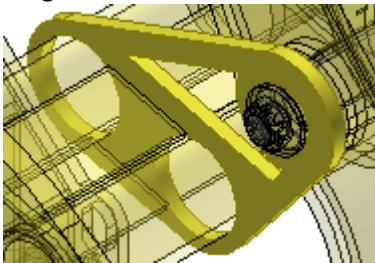
15. In the browser, right-click Sketch3. Click Visibility.



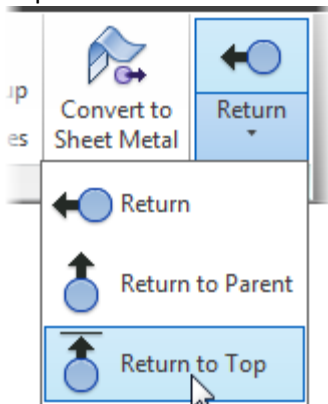
16. Use the Extrude tool to cut the inside of the sketch through the part to create the results as shown. When prompted to check out the part, click Yes.



17. In the browser, under Extrusion4, right-click Sketch3. Click Visibility. The sketch should no longer be visible.



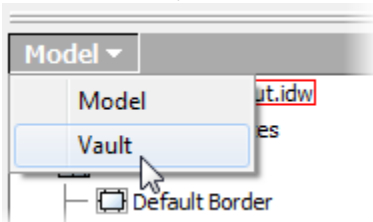
18. On the Model tab, Return panel, click Return to Top.



19. Switch to *Chassis, Front_Layout.idw* and review the changes to the drawing views.

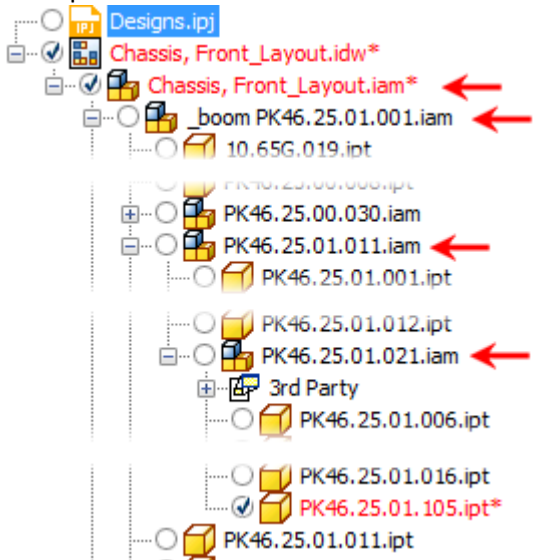


20. In the browser, click Model > Vault.



21. In the Vault browser:

- Expand Chassis, Front_Layout.iam.
- Expand _boom PK46.25.01.001.iam.
- Expand PK46.25.01.011.iam.
- Expand PK46.25.01.021.iam.

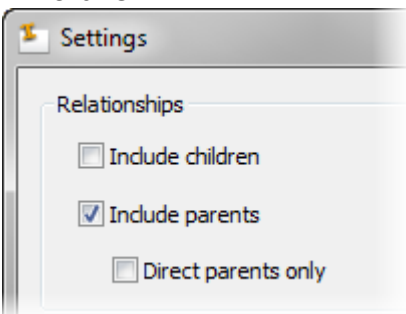


22. To begin to check out the assembly files that are parents to the modified part, in the browser, right-click PK46.25.01.021.iam. Click Check Out.

23. In the Check Out dialog box, click Settings.

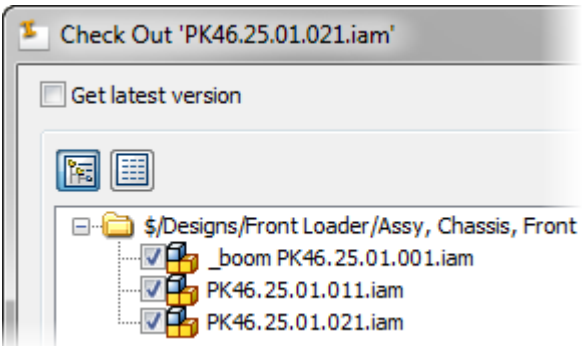
24. In the Settings dialog box:

- Clear the Include Children check box.
- Select the Include Parents check box.
- Click OK.

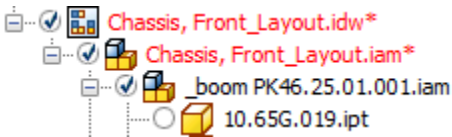


25. In the Check Out dialog box:

- Ensure that the check boxes for the three assemblies are selected.
- Click OK.



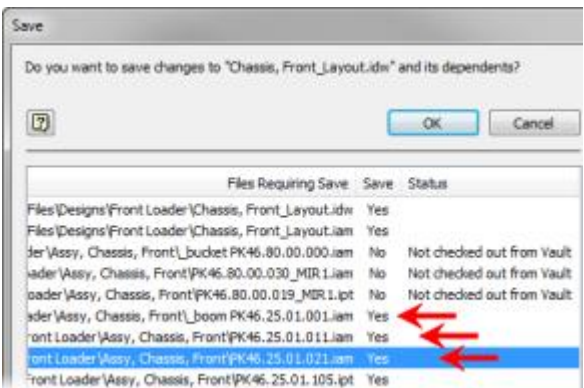
26. In the Vault browser, notice that the icons next to the assemblies indicate that the files are now checked out.



27. On the Quick Access toolbar, click Save.

28. In the Save dialog box:

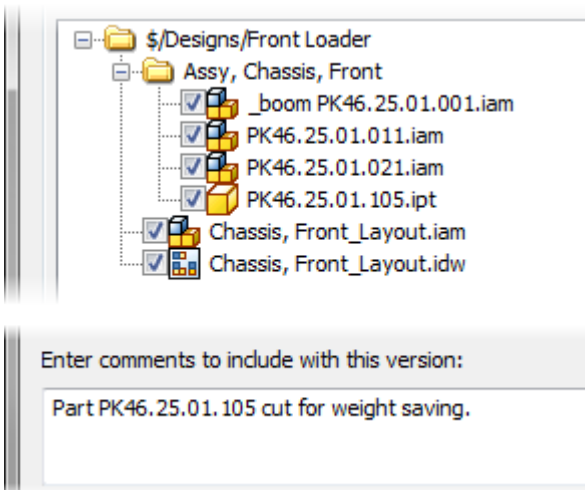
- In the Save column, set the three checked out assembly files to Yes.
- Ensure that the files checked out are set to Yes and that the files not checked out are set to No.
- Click OK.



29. On the Vault tab, File Status panel, click Check In.

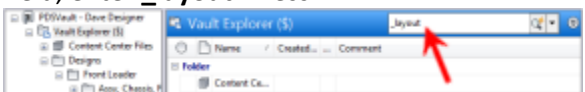
30. In the Check In dialog box:

- Review the list of files being checked in.
- In the Comments field, enter **Part PK46.25.01.105 cut for weight saving.**
- Click OK.

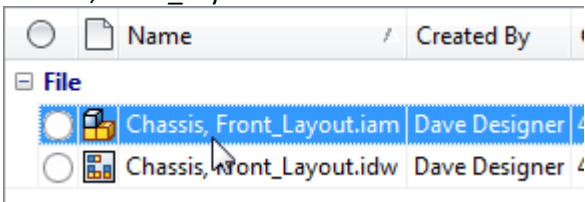


31. Switch to Autodesk Vault Basic.

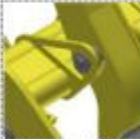

32. To locate specific named files, in the Search field, enter **_layout**. Press ENTER.



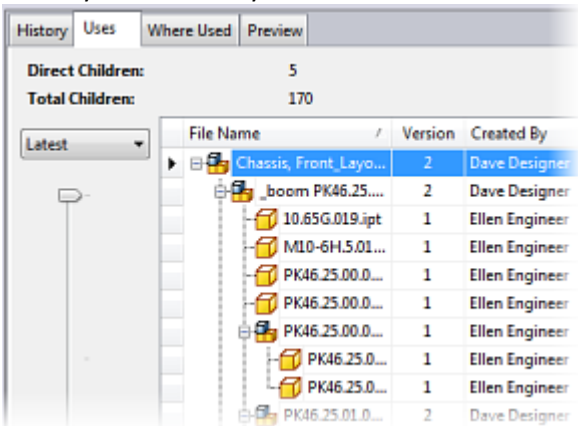
33. In the main panel search results list, select **Chassis, Front_Layout.iam**.



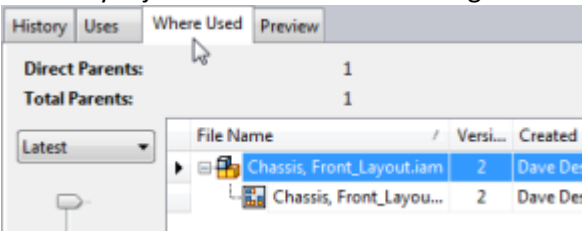
34. Click the History tab to see a list of the versions of this file. Notice that version 1 was checked in by Ellen Engineer and that this new version 2 was checked in by Dave Designer.

History	Uses	Where Used	Preview	
Number of versions:		2		
Local Same As:		Version 2		
Thumbnail	File Name	V...	Created By	
	Chassis, Front_Layout.iam	2	Dave Designer	
	Chassis, Front_Layout.iam	1	Ellen Engineer	

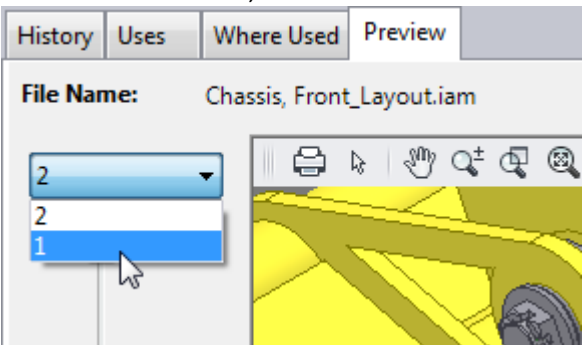
35. Click the Uses tab to see the list of files that are used by this assembly file.



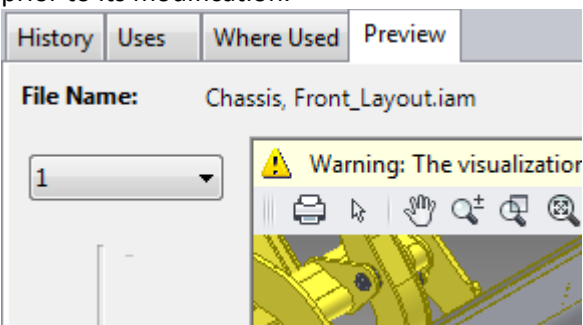
36. Click the Where Used tab to see a list of files that use this assembly file. Currently, the assembly is just used in the one drawing file.



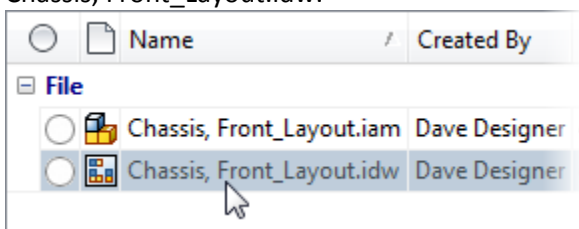
37. Click the Preview tab. Zoom in if necessary to see the part that was previously modified. The preview is for the current version (version 2) of the file.
38. In the list of versions, select 1.



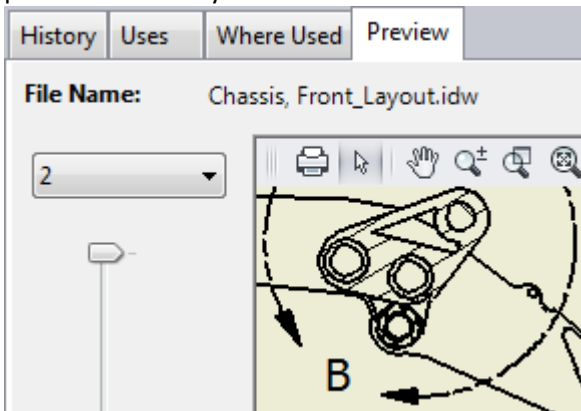
39. Review the preview of the part. Notice that it is now showing the initial version and the part prior to its modification.



40. In the main panel search results list, select Chassis, Front_Layout.idw.

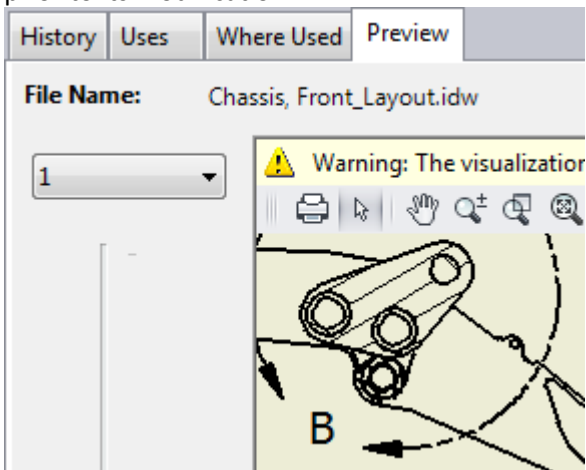


41. Review the preview of the drawing. Notice that it is showing the latest edited version of the part and assembly.



42. In the list of versions, select 1.

43. Review the preview of the part. Notice that it is now showing the initial version and the part prior to its modification.



44. Close Autodesk Vault.

45. In Inventor, close all files.