

# SolidWorks Workgroup PDM, Usage and Administration



**Length:** 1 day

**Prerequisites:** Basic experience with the SolidWorks software and the Windows™ operating system, and knowledge of SolidWorks file structure and referencing.

**Description:** The focus of this course is on the fundamental skills and concepts central to the successful use of SolidWorks Workgroup PDM. The intended audience for this course is vault administrators. The topics covered in this course are:

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## Lesson 1: PDM Concepts and File Management

- ❖ The Four Pillars of PDM
- ❖ What is the SolidWorks Workgroup PDM Software?
- ❖ SolidWorks Workgroup PDM Components
- ❖ Basic Rules
- ❖ SolidWorks File Management
- ❖ File References
- ❖ Opening Files
- ❖ Saving Files
- ❖ File Properties
- ❖ External Reference Search Order

## Lesson 2: Document Check In

- ❖ SolidWorks Workgroup PDM User Interface
- ❖ Starting SolidWorks Workgroup PDM
- ❖ SolidWorks User Interface
- ❖ Setting up SolidWorks Workgroup PDM
- ❖ Users Accounts
- ❖ User Options
- ❖ Document Check In Process
- ❖ Revision Scheme
- ❖ Lifecycle
- ❖ Checking in References
- ❖ Logging In/Out
- ❖ Creating Sub-projects
- ❖ Reporting

## Lesson 3: Accessing Documents

- ❖ Working on Vaulted Documents
- ❖ Modify an assembly
- ❖ Non-SolidWorks Documents

#### **Lesson 4: SolidWorks Workgroup PDM Environment**

- ❖ Searching for Documents
- ❖ Other SolidWorks Workgroup PDM Activities
- ❖ Reports
- ❖ Custom Properties
- ❖ Drawing Revisions
- ❖ SolidWorks Tools and Utilities
- ❖ Compare Drawings
- ❖ Compare Geometry
- ❖ Printing Drawings From The Vault
- ❖ Batch Print
- ❖ Exporting SolidWorks Workgroup PDM Files
- ❖ Automated File Properties
- ❖ Custom Properties in Templates
- ❖ Bulk Loading Files
- ❖ Alternate Methods to Access the Vault
- ❖ Case Study: Using SolidWorks Explorer
- ❖ Functional Differences
- ❖ User Options
- ❖ SolidWorks Workgroup PDM Viewer
- ❖ Case Study: Accessing the SolidWorks Workgroup PDM Viewer
- ❖ Software Updates

#### **Lesson 5: Toolbox and Files that are Not Revision Managed**

- ❖ Toolbox Parts
- ❖ Files That are Not Revision Managed
- ❖ The Toolbox Flag
- ❖ Standard Parts
- ❖ : Common Parts Project
- ❖ : Design Library
- ❖ Revision Bumping
- ❖ Adding Notes
- ❖ Removing Files From the Vault
- ❖ Case Study: Remove Files From The Vault
- ❖ Managing Configuration Revisions

#### **Lesson 1: Planning for PDM**

- ❖ The Planning Process
- ❖ Data Management Plan
- ❖ Transition Plan
- ❖ The VaultAdmin Tool

## **Lesson 2: SolidWorks Workgroup PDM Setup**

- ❖ The Vault
- ❖ Vault Backup
- ❖ Vault Restoration
- ❖ VaultAdmin Settings
- ❖ User Accounts
- ❖ Projects
- ❖ Project Access
- ❖ Project Settings
- ❖ Copy Project Settings
- ❖ Revision Scheme
- ❖ Lifecycles
- ❖ Standard Libraries
- ❖ Toolbox Parts
- ❖ Vault Settings
- ❖ Adding Custom Properties
- ❖ Search
- ❖ Index the Vault
- ❖ Revision Table Properties

## **Lesson 3: Maintaining the Vault**

- ❖ Maintaining The Vault
- ❖ Vault Backup
- ❖ Log Files
- ❖ Tree Options
- ❖ Maintaining User Accounts
- ❖ Modify Users
- ❖ Regaining Disk Space
- ❖ Archiving Files
- ❖ Update Software
- ❖ File Conversion

## **Lesson 4: Administration Tasks**

- ❖ Mapping Custom Properties
- ❖ Copy Project
- ❖ Bulk Loading Files
- ❖ Case Study: Bulk Check In Files
- ❖ Transferring Projects between Vaults
- ❖ Case Study: Exporting Projects