

Administering SolidWorks Workgroup PDM



Length: 1 day (9am – 3pm)

Prerequisites: Basic experience with the SolidWorks software, experience with 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 SolidWorks users.



Introduction

- ❖ About This Course
- ❖ Windows® XP
- ❖ Use of Color

Lesson 1: Planning for PDM

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

Lesson 2: SolidWorks Workgroup PDM Setup

- ❖ Administrator Topics
- ❖ The Vault
- ❖ Vault Backup
- ❖ Vault Restoration
- ❖ Case Study: Replace the Vault
- ❖ VaultAdmin Tool
- ❖ VaultAdmin Settings
- ❖ User Accounts
- ❖ Case Study: User Accounts
- ❖ Case Study: Groups
- ❖ Projects
- ❖ Project Access
- ❖ Project Settings
- ❖ Case Study: Copy Project Settings
- ❖ Revision Scheme
- ❖ Lifecycles
- ❖ Case Study: Create Lifecycles
- ❖ Standard Libraries
- ❖ Case Study: Common Parts
- ❖ Case Study: Toolbox Parts
- ❖ Vault Settings
- ❖ Case Study: Global Settings
- ❖ Custom Properties
- ❖ Case Study: Adding Custom Properties
- ❖ Search
- ❖ Case Study: Index the Vault
- ❖ Revision Table
- ❖ Case Study: Revision Table Properties

Lesson 3: Maintaining the Vault

- ❖ Case Study: Vault Backup
- ❖ Case Study: Log Files
- ❖ Tree Options
- ❖ Maintaining User Accounts
- ❖ Case Study: Modify Users
- ❖ Case Study: Passwords
- ❖ Regaining Disk Space
- ❖ Case Study: Obsolete Folders
- ❖ Archiving Files
- ❖ Case Study: Archiving Files
- ❖ Updating Software
- ❖ File Conversion
- ❖ Case Study: Converting Files in the Vault

Lesson 4: Administrator Tasks

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

Appendix

- ❖ Setting up the SolidWorks Workgroup PDM Viewer
- ❖ Triggers
- ❖ Triggers Example
- ❖ Best Practices