

# SolidWorks Workgroup PDM CAD Editor



**Length:** 1 day

**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: PDM Concepts and File Management

- ❖ The Four Pillars of PDM
- ❖ What is the SolidWorks Workgroup PDM Software?
- ❖ SolidWorks Workgroup PDM Overview
- ❖ SolidWorks Workgroup PDM Components
- ❖ Basic Rules
- ❖ SolidWorks File Management
- ❖ File References
- ❖ File Reference Example
- ❖ 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
- ❖ Getting Help
- ❖ Setting up SolidWorks Workgroup PDM
- ❖ Users Accounts
- ❖ Case Study: Checking In SolidWorks Documents
- ❖ 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
- ❖ Case Study: Modify an assembly
- ❖ Check Out Alternative
- ❖ Non-SolidWorks Documents

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

- ❖ Searching for Documents
- ❖ Case Study: Setting Up Windows Search
- ❖ Searching for Documents in the Vault
- ❖ Case Study: Advanced Search
- ❖ Other SolidWorks Workgroup PDM Activities
- ❖ Reports
- ❖ Custom Properties
- ❖ Case Study: Adding Properties
- ❖ Drawing Revisions
- ❖ Case Study: Drawing Revisions
- ❖ SolidWorks Tools and Utilities
- ❖ Case Study: Compare Drawings
- ❖ Case Study: Compare Geometry
- ❖ Collaboration
- ❖ Case Study: Collaboration
- ❖ Printing Drawings From The Vault
- ❖ Case Study: Batch Print
- ❖ Exporting SolidWorks Workgroup PDM Files
- ❖ Automated File Properties
- ❖ Case Study: 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
- ❖ Toolbox Case Studies
- ❖ Case Study: Adding Toolbox Parts
- ❖ Files That are Not Revision Managed
- ❖ Case Study: Not Revision Managed Files
- ❖ Case Study: The Toolbox Flag
- ❖ Standard Parts
- ❖ Drag and Drop
- ❖ Case Study: Common Parts Project
- ❖ Case Study: Design Library
- ❖ Revision Bumping
- ❖ Adding Notes
- ❖ Case Study: Revision Bumping
- ❖ Removing Files From the Vault
- ❖ Explain Access
- ❖ Case Study: Remove Files From The Vault
- ❖ Managing Configuration Revisions
- ❖ Case Study: Configuration Revisions