



SolidWorks WorkGroup PDM 2012 *Course outline*

There are two distinct Product Data Management (PDM) programs available through CADimensions. They are SolidWorks Workgroup PDM and SolidWorks Enterprise PDM. The following is a general outline for each of the courses. It should be noted that the SolidWorks Workgroup PDM training, in particular, can vary depending on the way the software is implemented. The instructor will base the material on the needs of the class.

Each course consists of lectures and case studies demonstrated by the instructor. Students are then given lab exercises that reinforce the topics covered. Training manuals are given to each student. Computers are provided by CADimensions unless other arrangements have been made, such as onsite training.

SW Workgroup PDM - User

Morning

Lesson 1 PDM concepts and file management, understanding SolidWorks file references, workgroup components and overview, understanding basic document flow, basic definitions used with PDMWorks Workgroup.

Lesson 2 Workgroup interface, logging in, user options, local view versus vault view, check in process, lifecycles, checking in references, creating sub-projects, report creation.

Afternoon

Lesson 3 Checking out and taking ownership of documents, renaming files, revision tables, adding attachments.

Lesson 4 The Workgroup environment, desktop search, search conditions, adding custom properties, managing revisions, custom reports, comparing files. Batch printing, automated custom properties, bulk check-in, workgroup viewer, SolidWorks Explorer.

Corporate Headquarters

6310 Fly Road • East Syracuse, New York 13057
Phone: (315) 434-9787 • Fax: (315) 434-9782

Regional Offices

Albany • Phone: (518) 438-0647 • Fax: (518) 438-0761
Rochester • Phone: (585) 486-4740 • Fax: (585) 424-2342
Buffalo • Phone: (716) 580-3498 • Fax: (716) 362-0310

SW Workgroup PDM – User & Administrator

Morning

Lesson 5

Managing templates, Toolbox parts, and common parts that are not typically revision managed, revision bumping, removing files from the vault, configuration revisions.

Afternoon *(administrators only)*

Lesson 6

The PDMWorks vault, backing up the vault, vault restoration, the Vault Admin Tool, user accounts, groups, projects, project access, project settings, revision scheme setup, lifecycle setup, Vault settings, adding custom properties, Toolbox setup, triggers.

Lesson 7

Lock the vault and stop the PDMWorks service, replace the vault with a copy, maintain user accounts, change user passwords, clear obsolete folders, archive projects, use custom property mappings, bulk check in of documents, update the VaultAdmin software.

SW Enterprise PDM - User

Morning *(half day only)*

Lesson 1-4

PDMWorks Enterprise concepts and components, logging in and out, user interface and “Explorer View”, data cards and tabs, checking files into and out of the vault

Lesson 5-8

File version details, retrieving files with references, search capabilities, creating files and folders from templates, SolidWorks Enterprise interface, Enterprise options, workflow, changing file states.

Corporate Headquarters

6310 Fly Road • East Syracuse, New York 13057

Phone: (315) 434-9787 • Fax: (315) 434-9782

Regional Offices

Albany • Phone: (518) 438-0647 • Fax: (518) 438-0761

Rochester • Phone: (585) 486-4740 • Fax: (585) 424-2342

Buffalo • Phone: (716) 580-3498 • Fax: (716)362-0310

SW Enterprise PDM - Administrator

Morning

- Lesson 1 Installation planning, gathering of necessary information.
- Lesson 2 The Administration tool, creating a new Enterprise vault, creating a local vault view, understanding the main sections of the admin tool.
- Lesson 3 Setting up users and groups, descriptions of various permissions, assigning permissions to transitions, copying permissions, user passwords, managing users.
- Lesson 4 Data card variables, managing and generating serial numbers, data card lists and dynamic lists from SQL sources.

Afternoon

- Lesson 5 File and folder data cards, designing and customizing data cards using various controls (such as radio buttons, droplists, text boxes, etc.), utilizing control logic.
- Lesson 6 Template customization for creating new projects and folder structures.
- Lesson 7 Creating workflow categories, assigning category conditions.
- Lesson 8 Utilizing workflows, workflow states, transitions and transition conditions, transition actions and workflow notifications

Corporate Headquarters

6310 Fly Road • East Syracuse, New York 13057
Phone: (315) 434-9787 • Fax: (315) 434-9782

Regional Offices

Albany • Phone: (518) 438-0647 • Fax: (518) 438-0761
Rochester • Phone: (585) 486-4740 • Fax: (585) 424-2342
Buffalo • Phone: (716) 580-3498 • Fax: (716) 362-0310