



Administrating SOLIDWORKS PDM Professional

Length: 3 days

Prerequisite: Experience with the Windows operating system.

Description: Administering SOLIDWORKS PDM Professional teaches the fundamental skills and concepts central to the configuration and successful use of SOLIDWORKS PDM Professional through lecture and individual hands on exercises. The intended audience for this course is anyone who will setup and/or administer SOLIDWORKS PDM Professional. This course is designed for simple implementations and supporting roles.

The topics covered in this course are:

Introduction

About This Course

More SOLIDWORKS Training Resources

Lesson 1: Installation Planning

Planning for SOLIDWORKS PDM Professional

The Planning Process

Training Scenario

The Installation Process

Lesson 2: The Administration Tool

SOLIDWORKS PDM Professional Administration Tool

Case Study: Create a New File Vault

Create a Local File Vault View

Setup Overview

Lesson 3: Users and Groups

Data Cards

Anatomy of a Data Card

Case Study: Design a Folder Data Card

Lesson 5: File and Search Cards

Importing Data Cards

Case Study: Design a File Data Card

Case Study: Design a Search Data Card



Lesson 6: Column and Bill of Materials (BOM) Views

Columns

Case Study: Columns

Bill Of Material

Case Study: BOM

Lesson 7: Workflow

Workflows

Categories

Case Study: Create Categories

Case Study: Create New Workflows

Revisions

Case Study: Create New Revision Schemes

Drawing Revision Tables

Case Study: CAD Files Revision Scheme

Lesson 8: Notifications and Tasks

Notifications

Case Study: Assign Notifications

Case Study: Convert Task

Lesson 9: Folder Templates

Templates

Case Study: Folder Template

Lesson 10: File Templates

File Templates

Case Study: File Template

Templates with Other File Types

Case Study: ACME Specifications Template

Lesson 11: Data Migration

Migrating Legacy Data

Case Study: Data Migration

Migrating Revisions

Lesson 12: Vault Backup

Backing Up File Vaults



Appendix A: File Types and Settings

File Types

User Settings

Appendix B: Data Import/Export

Import and Export ERP Data

Case Study: Alias Set

Case Study: Export Rule

Case Study: Import Rule

Appendix C: Toolbox Setup

Toolbox Setup

Appendix D: Routing Setup

Routing Setup

Appendix E: CircuitWorks Setup

CircuitWorks Setup