

Course: SOLIDWORKS PDM Admin

MFG

Description

This course teaches the fundamental skills and concepts central to the successful use of SOLIDWORKS PDM to those responsible for setting up and/or administering it.

Training objectives

On completion of this course, you will understand the process and procedures you follow to complete a particular task along with the skills and concepts central to the successful use of SOLIDWORKS PDM including storing documents, revision control, and working with SOLIDWORKS.

Prerequisites

Experience with Windows OS. Basic experience with SOLIDWORKS software. Knowledge of SOLIDWORKS file structure & referencing.

Skills you will acquire


Manage your company documents. Share & collaborate with others. Apply document Revision Control & Workflow management.

Who should attend


Anyone who will setup and/or administer SOLIDWORKS PDM.

Delivery mode

 Face-to-face

 Virtual classroom

Duration

 2 days or 3 hours



Course Outline

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

- Users
- Case Study: Creating Users Groups
- Case Study: Create a New Group

Lesson 4: Folder Card Creation 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