ENGINEER3D! TRAINING+TECHNOLOGY CONFERENCE

OCTOBER 2-3 MILWAUKEE, WI

PDM Pro Tips For Users

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Overview

Increase user productivity with PDM Professional

- Favorite Links
- Display Options
- Creating Search Favorites
- Compare Versions
- Copy Link
- Move Tree
- Copy Tree



- Search Wildcards
- Exporting Search Results to Excel
- PDM 2019 Enhancements





Favorite Links

- Pin to quick access
 - Vault View
 - Folders within vault







Favorite Links

- Desktop Vault-view shortcut creation in Windows 10
 - Right-click on desktop
 - Select New
 - Click Shortcut
 - Click Browse
 - Browse to Vault-view
 - Click OK
 - Click Next
 - Name your shortcut
 - Click Finish







Favorite Links

- Deleting Vault-view shortcut
 - Select by left-click
 - Press 'Delete' key
- ! Caution !
 - Be careful not to accidentally delete your actual vault view









Display Optic

Part Number:

Description:

Project Name:

Project Number:

Material:

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Display Options

✓ Show full UI in SOLIDWORKS preview

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Display Options

✓ Show bitmap for SOLIDWORKS files

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Display Options

✓ Split Preview Tab/Preview Placement









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Creating Search Favorites

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P-00002								

- Use "Search Tool"
 - Define Your Search
 - Add to Favorites
 - Associated icon will be a colored star

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Creating Search Favorites

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• Favorite(s) show up in multiple places.







Compare Versions

- Right-click in explorer, "History"
 - Pick two events, select "Compare"

History on Part1.SLDDRW			
🕞 View 🕼 Get 🔚 Save 🤚 Compare 🖷 Print			
Event	Version	User	Date
Charked in	11	Admin	04/11/2017 15:22:15
Revision: C	10	Admin	04/11/2017 15:30:32
P_Transition from 'Work In Progress' to 'Production Released'	10	Admin	04/11/2017 15:30:32
Checked in	10	Admin	04/11/2017 15:30:32
Checked in	9	Admin	04/11/2017 15:30:32
Checked in	8	Admin	04/11/2017 15:30:03
Transition from 'Production Released' to 'Work In Progress'	7	Admin	04/11/2017 15:30:03
Revision: B	7	Admin	04/11/2017 15:27:14
Transition from 'Work In Progress' to 'Production Released'	7	Admin	04/11/2017 15:27:14
Checked in	7	Admin	04/11/2017 15:27:14
Checked in	6	Admin	04/11/2017 15:27:06
Transition from 'Production Released' to 'Work In Progress'	5	Admin	04/11/2017 15:27:06
Revision: A	5	Admin	04/11/2017 15:26:59
Transition from 'Work In Progress' to 'Production Released'	5	Admin	04/11/2017 15:26:59
Checked in	5	Admin	04/11/2017 15:26:59
Checked in	4	Admin	04/11/2017 15:26:21
Transition from 'Production Released' to 'Work In Progress'	3	Admin	04/11/2017 15:26:21
Revision: -	3	Admin	04/11/2017 15:26:08
Transition from 'Work In Progress' to 'Production Released'	3	Admin	04/11/2017 15:26:08
Checked in	3	Admin	04/11/2017 15:26:08
📮 Initial transition to 'Work In Progress'	2	Admin	04/11/2017 15:25:45
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Copy Link

- Creates hyperlink
- Just like a notification
- Can be pasted in:
 - E-mails
 - Word documents
 - Excel documents
 - Pdf's

conisio://e3d/explore? projectid=11&documentid=13&objectty pe=1 Ctrl+Click to follow link side_table_shelf_and_burners.SLDASM

conisio://<vaultname>/<action>?projectid=<ProjectID>&documentid=<DocumentID>&objecttype=1

Туре:	SOLIDWORKS Assembly Document
Location:	C:\Vaults\E3D\Projects\P-00001\CAD Files\side_table_shelf_and_burners.SLDASM
Size:	567.76 KB





Copy Tree

- PDM equivalent of Pack and Go
 - Quickly copy files
 - Integration with PDM serial numbers

Dela	ult Destination:	C: \Vaults \E3D \Projects \P	-00001\CAD Files									~	Brown	se
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Move Tree

- Similar options to Copy Tree
- Quicker than manually tracking references if moving files

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- Refined search results
- Faster search results

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Search Wildcard Operators

Wildcard Description

- * Any number of characters of any kind can be filled in
- ? One character of any kind can be filled in
- = Exact entry
- != Exclude exact entry
- Space Act as an "OR"
- "" Exact string of characters using spaces





(*) - Any number of characters of any kind can be filled in Examples:

mm

mm

*mm

mm*





(*) - Any number of characters of any kind can be filled in Examples:

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*mm

mm*





(*) - Any number of characters of any kind can be filled in Examples:

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(*) - Any number of characters of any kind can be filled in Examples:

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(*) - Any number of characters of any kind can be filled in Examples:

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mm*





(?) - One character of any kind can be filled in

Examples: mm?template?sldprt

mm?00000??sldprt

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(?) - One character of any kind can be filled in

Examples:

mm?template?sldprt mm?00000??sldprt

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(=) - Exact entry Examples:

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=weldment.sldprt

=weldment

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(=) - Exact entry Examples:

=mm_template.sldprt =weldment.sldprt

=weldment

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(=) - Exact entry Examples:

=mm_template.sldprt =weldment.sldprt

=weldment

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(!=) - Exclude exact entry

Example:

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() - Acts as an "OR" Examples:

mm brkt

tube part mm



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() - Acts as an "OR" Examples:

mm brkt

tube part mm



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("") - Exact string of characters using spaces

Examples:

"cylinder assy"

"5 x 2"



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("") - Exact string of characters using spaces Examples:

"cylinder assy"

"5 x 2"



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The elusive "AND" Wildcard/Operator







Exporting Search Results to Excel

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• Open search results from toolbar.

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PDM Options in SOLIDWORKS

Options			? ×			
Server View Setting						
Arrow buttons jump to next file in the tree (not th Display instances of parts Display instances of assemblies	e next row)					
Display Information						
Information to display:	File / Variable		~			
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Optimized variable preview (Only read values from Display Status Show quick-info icon	n the SQL database)					
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✓ Referencing a file version that is not the latest						
The local file is older than the file in the vault						
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The file is edited in SOLIDWORKS but not save	Ø					
Checked in by another user during the current	SOLIDWORKS se	×,				
Reset All	ОК	0	ancel Help			



http://help.solidworks.com/2019/English/EnterprisePDM/FileE xplorer/SOLIDWORKS Add-in Options.htm?format=P&value=



Default Search Variable in Search Cards

- Search cards default to logged in user
 - Variables such as:
 - Checked out by
 - Author
 - Created By
 - Transitions by User
 - Set default value to %user%
 - Reduces amount of search favorites created

🖬 Checked Out by U	ser	
Name and Location	Cards Variables Checked in/out Version	n Data Workflow Label History Content
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Display checked	out files	
Display non-che	📧 Default Values	? ×
	Variable	Value
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File Shortcut Menu

- Improved right mouse button context menu
- Available in tabs:
 - Bill of Materials
 - Contains
 - Where used



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Support for eDrawings Functionality

- Now supports configurations
- Switching between Drawings sheets







Selection of Referenced Drawing Nodes During Change State

Type

Comment

문문

- New User Setting ${}^{\bullet}$
 - Do not select references defined as drawing nodes during state change
- If active, will select the associated drawing(s) of the model during a state change





Design Library Cache

- Design Library Folders located in PDM are recognized and identified
- Components are
 automatically cached
- Components are always available for selection







Your Feedback is appreciated!

	Session Nam	e:				
	Presenter N	ame:				
5.00M					ee with ea	ach
Session Evaluation Form	For each qu	estion, ple nk you for	your partic	ipation.	51	trangly
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Session evaluation forms are located in the back of your conference program.

Session Name: PDM Tips and Tricks for Users Presenter Name: Tong Xiong

Please remove your completed form and <u>place</u> <u>in box by the door.</u>

Thanks You!



