



ENGINEER **3D!**
TRAINING+TECHNOLOGY
CONFERENCE

OCTOBER 2-3
MILWAUKEE, WI



PDM Pro Tips For Users

Tong Xiong, PDM Applications Engineer, GSC



Overview



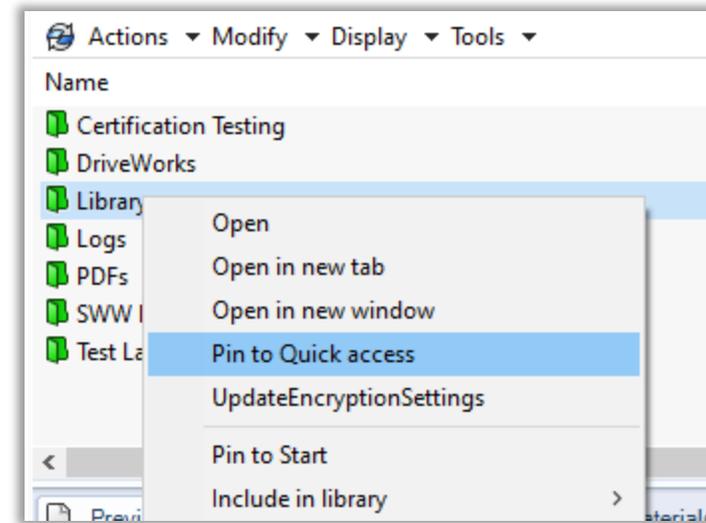
Increase user productivity with PDM Professional

- 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



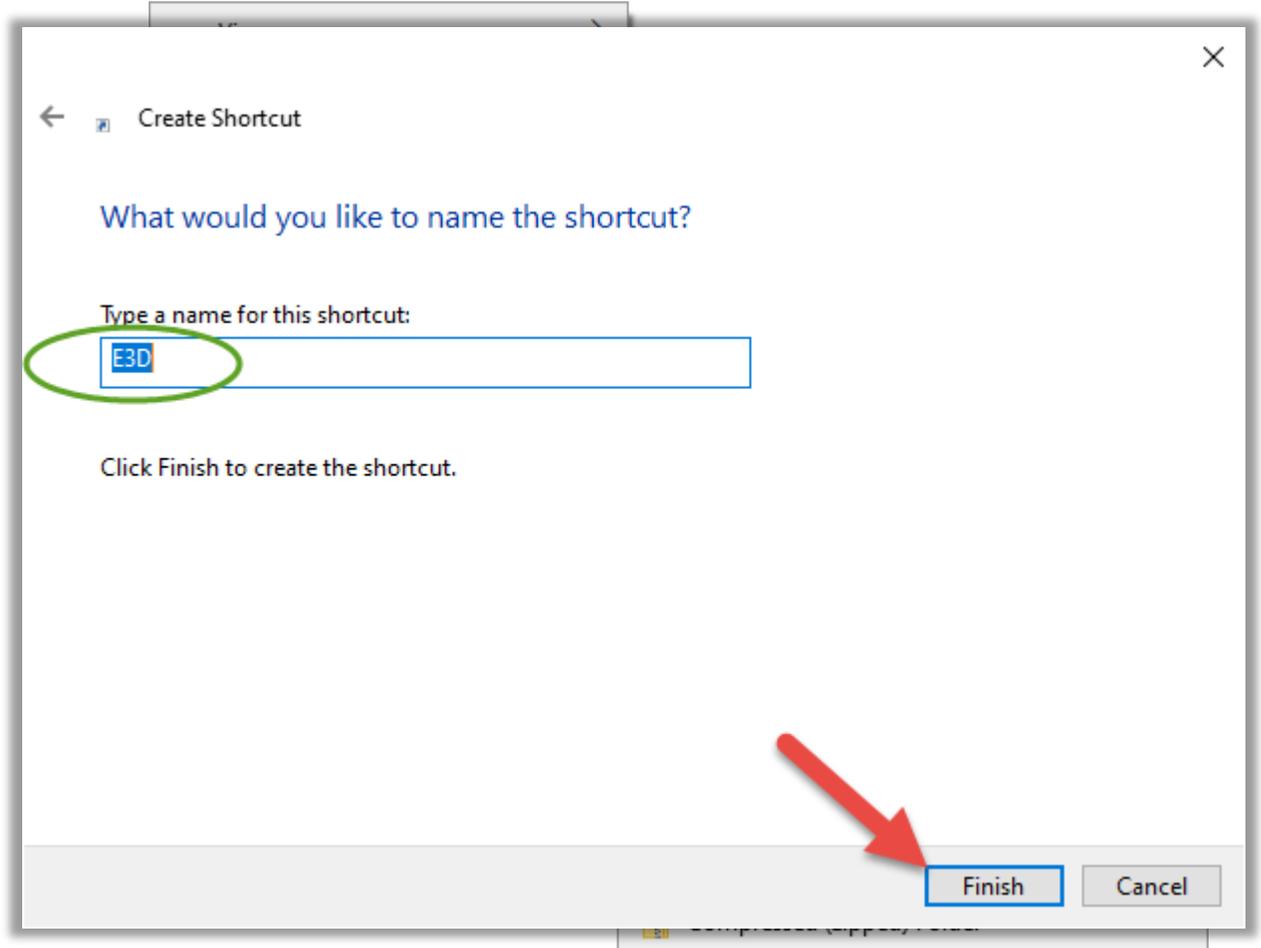
Favorite Links

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



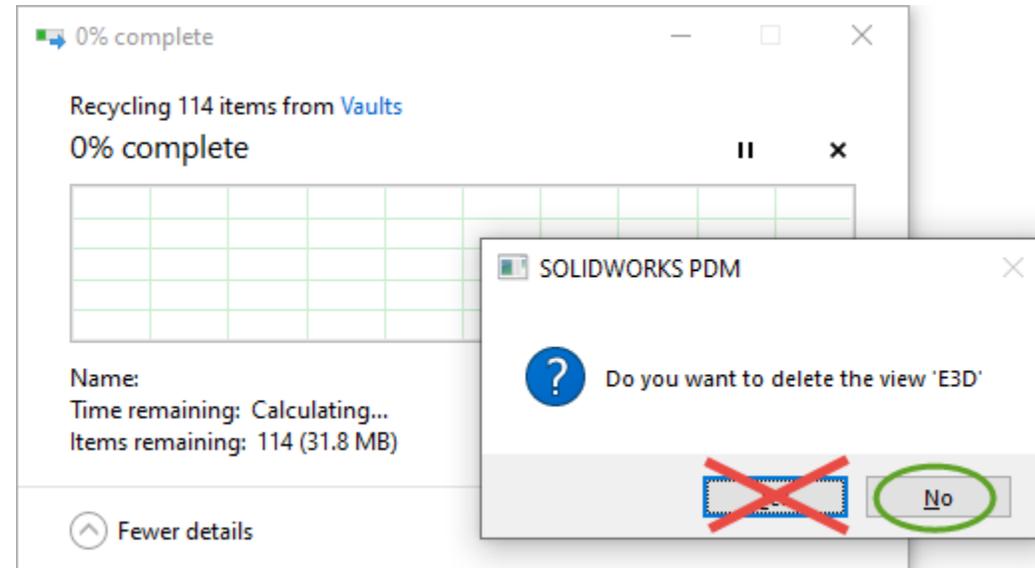
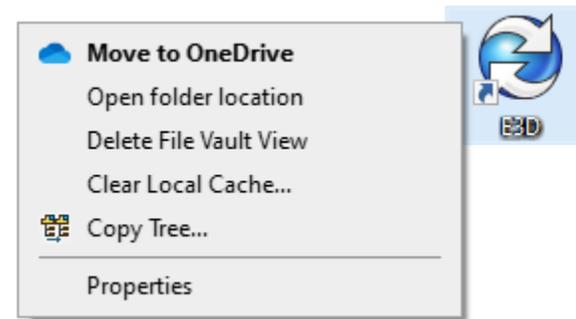
Favorite Links

- 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 Options

- ✓ Hide the @ configuration

Display Tools

- ✓ Show Files
- Show Bills of Materials
- Show Search Results
- History
- View File
- ✓ File Preview
- ✓ Card Preview
- Split Preview Tab >
- Preview Placement >
- Options >
- Properties

Checked Out By	Size	File Type	State	Modifie
	417.9 KB	SOLIDWORKS...	Work In Pro...	09/25/2
	172.97 KB	SOLIDWORKS...	Work In Pro...	09/25/2
	116.85 KB	SOLIDWORKS...	Work In Pro...	09/25/2
	483.31 KB	SOLIDWORKS...	Work In Pro...	09/25/2
	747.32 KB	SOLIDWORKS...	Work In Pro...	09/25/2
	525.22 KB	SOLIDWORKS...	Work In Pro...	09/25/2
	109.1 KB	SOLIDWORKS...	Work In Pro...	09/25/2
	595.33 KB	SOLIDWORKS...	Work In Pro...	09/25/2
	476.3 KB	SOLIDWORKS...	Work In Pro...	09/25/2

- Excluded File Types...
- Full Row Select
- Hide the @ configuration
- ✓ Set focus to active configuration
- Show bitmap for SOLIDWORKS files
- ✓ Show full UI in SOLIDWORKS preview
- ✓ Include SOLIDWORKS Simulation results in Check-In
- ✓ Extract hidden BOM from SOLIDWORKS files on Check-In
- Show Bitmap for DWG-files

@ 2 Burner 4 Burner Default

Part Info Comments

Part Number: Bumer Panel Assembly Revision: A

Description: Bumer Panel Assembly

Material: N/A Weight: 17.42

Project Name:

Project Number: P-00002

GSC

Document Status

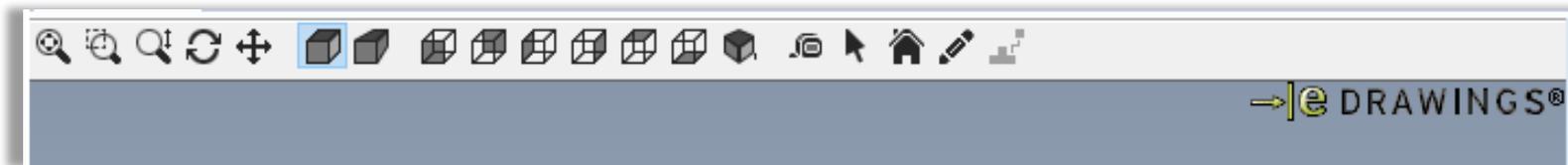
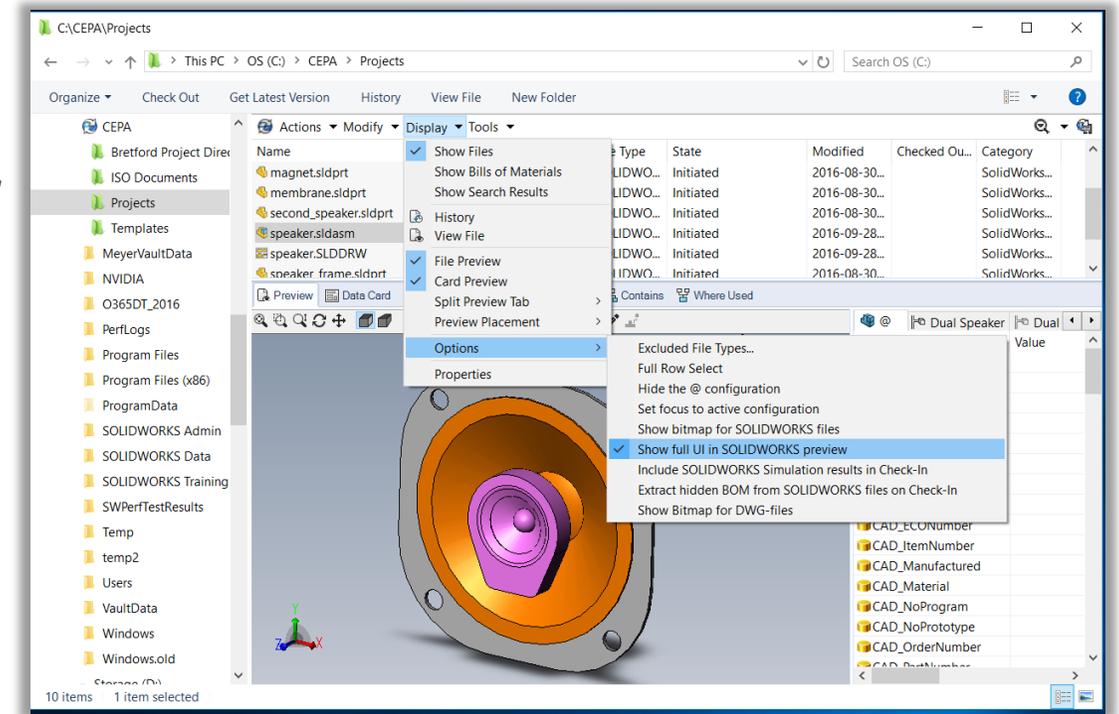
Current State: **Work In Progress**

Checked out by:



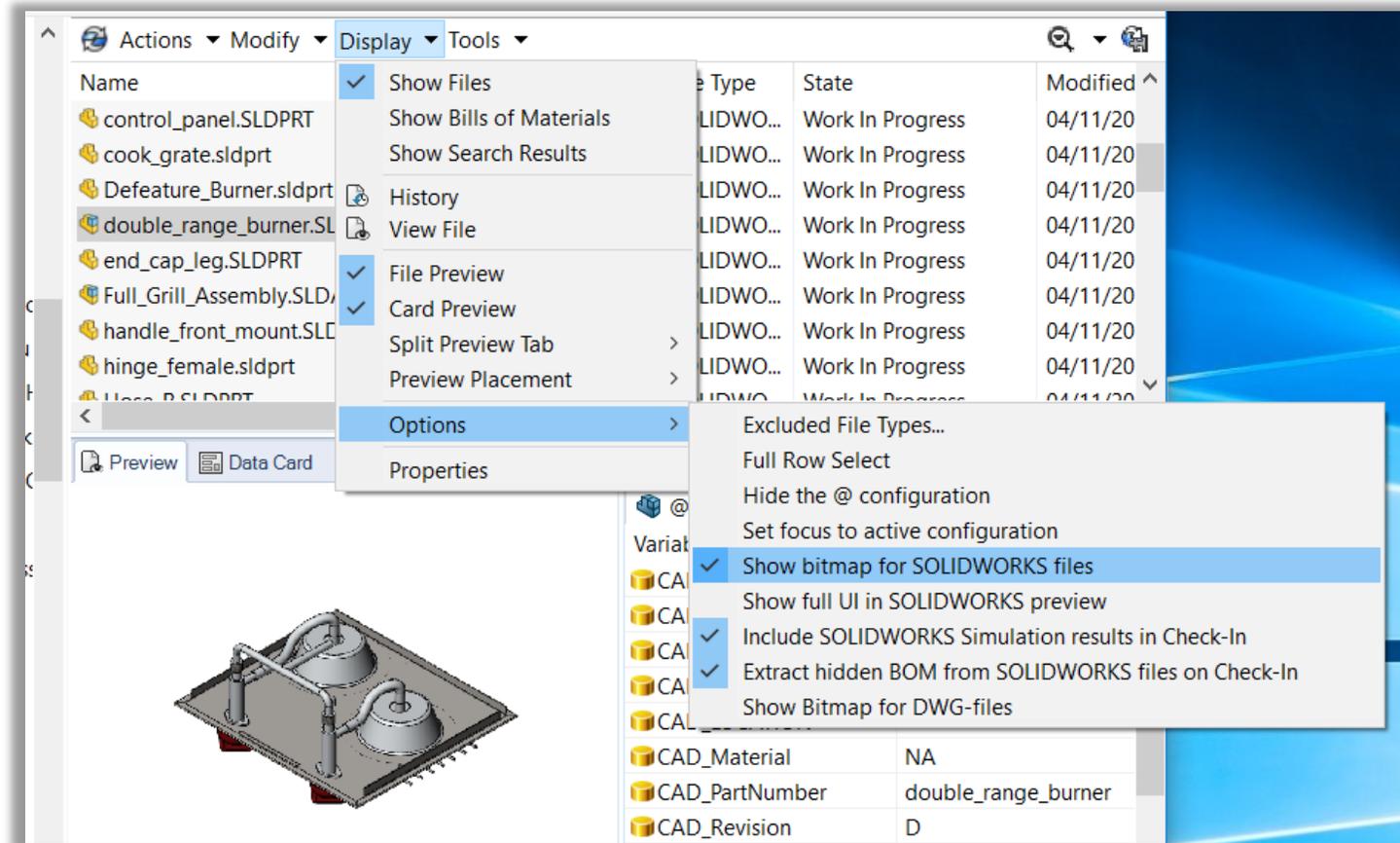
Display Options

- ✓ Show full UI in SOLIDWORKS preview



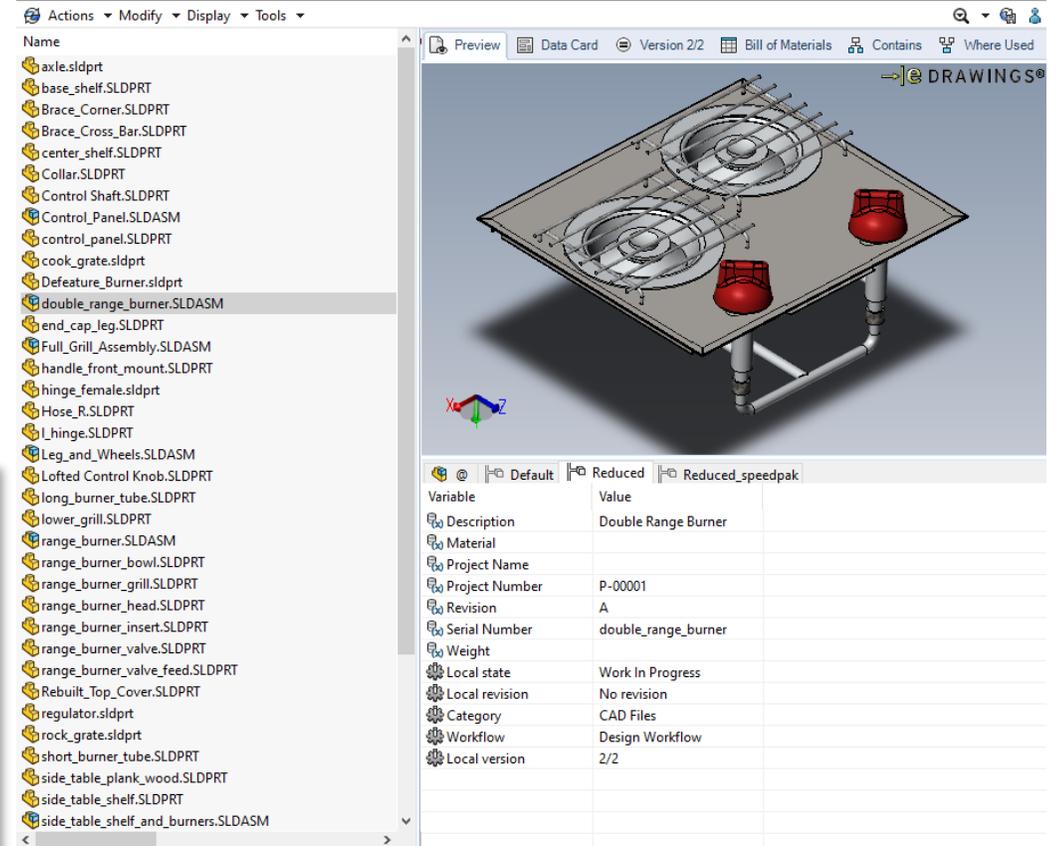
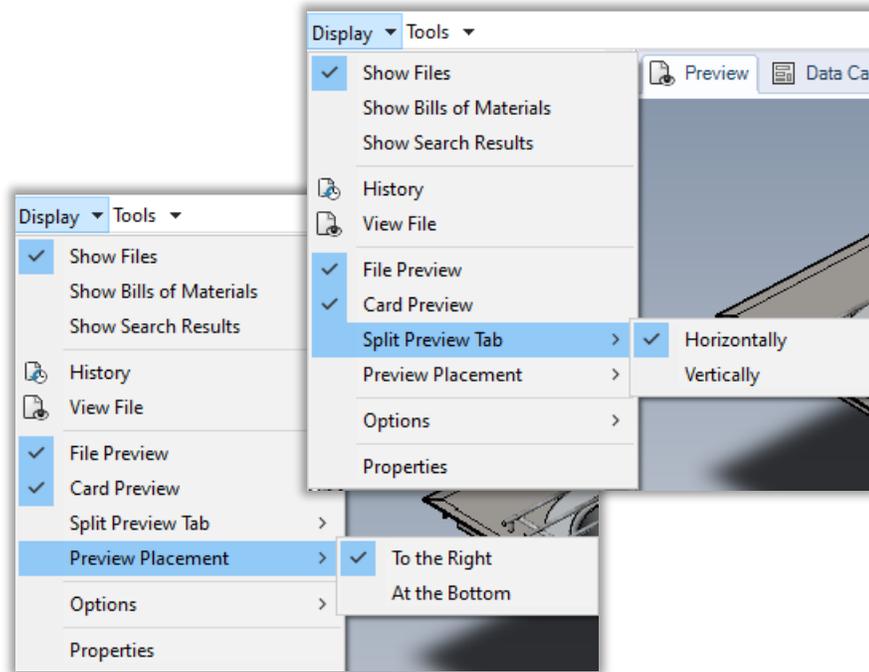
Display Options

- ✓ Show bitmap for SOLIDWORKS files

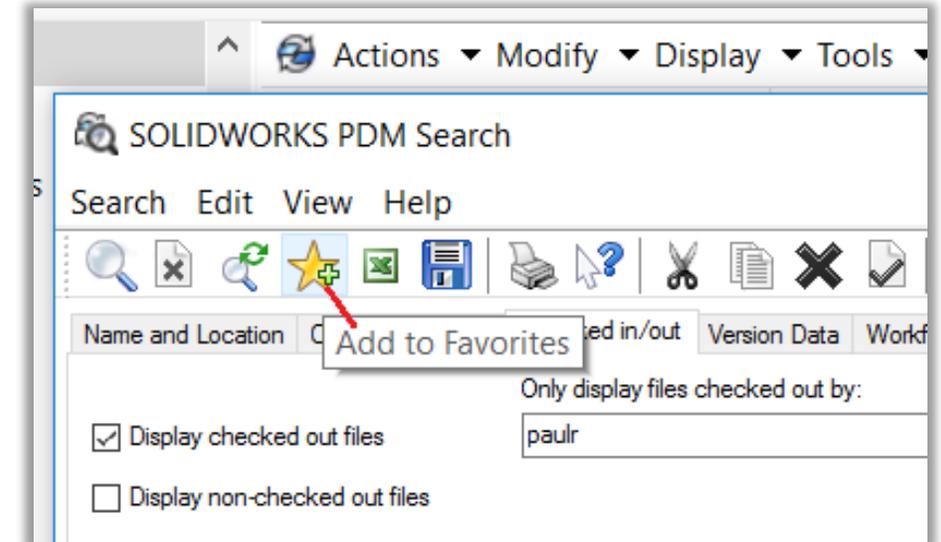
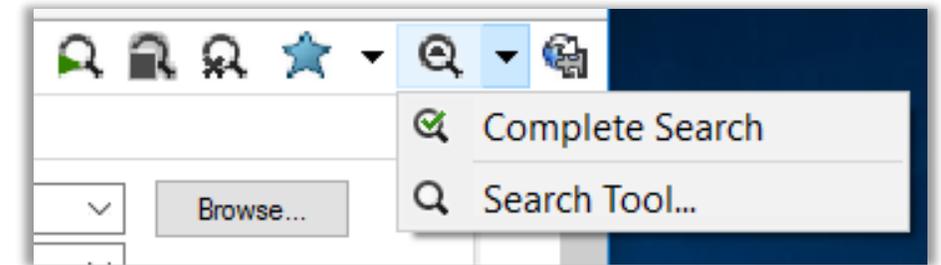
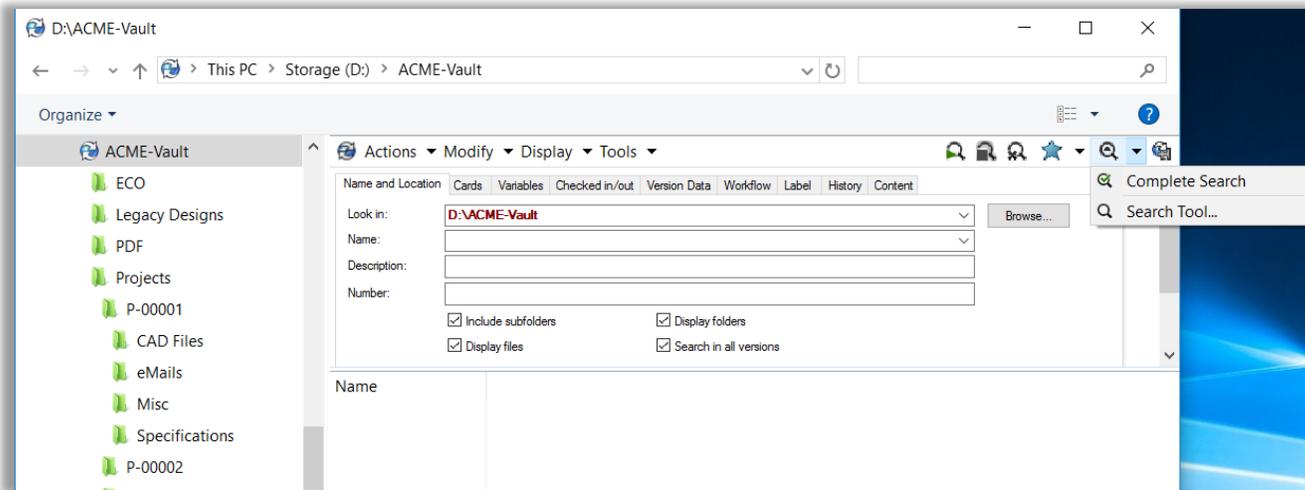


Display Options

✓ Split Preview Tab/Preview Placement



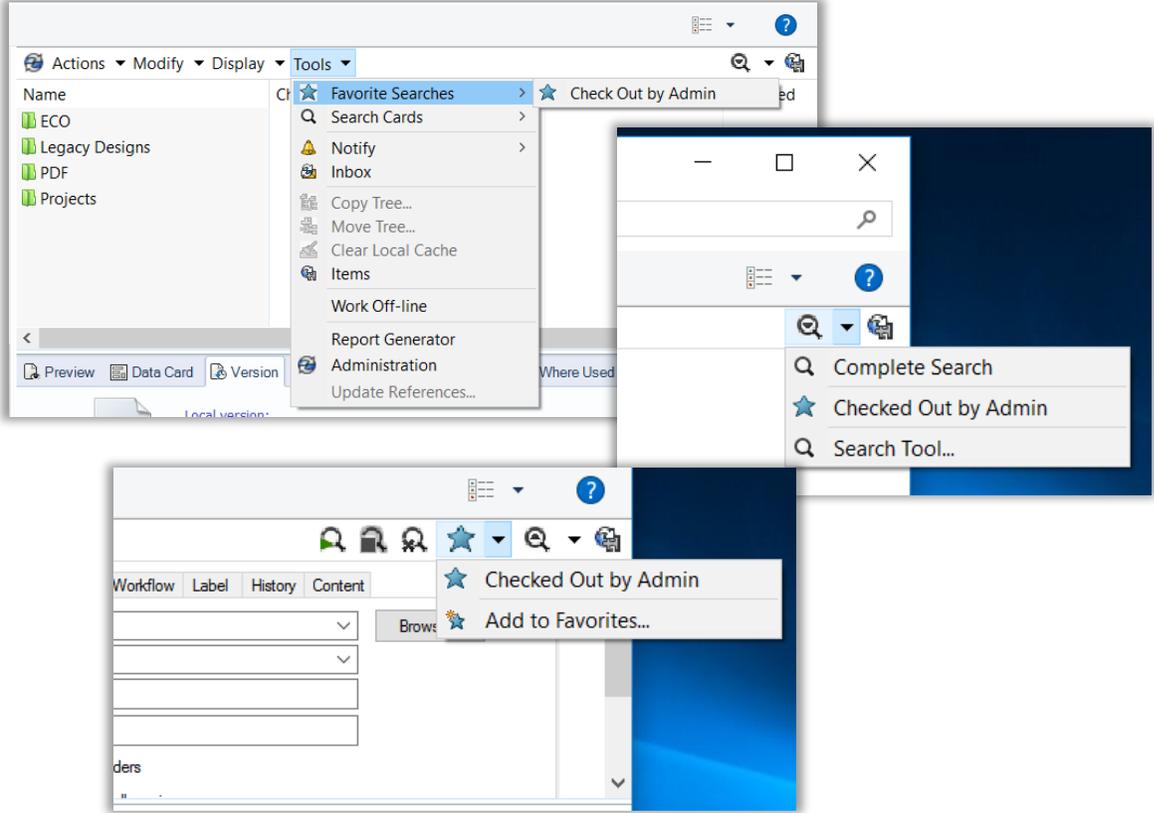
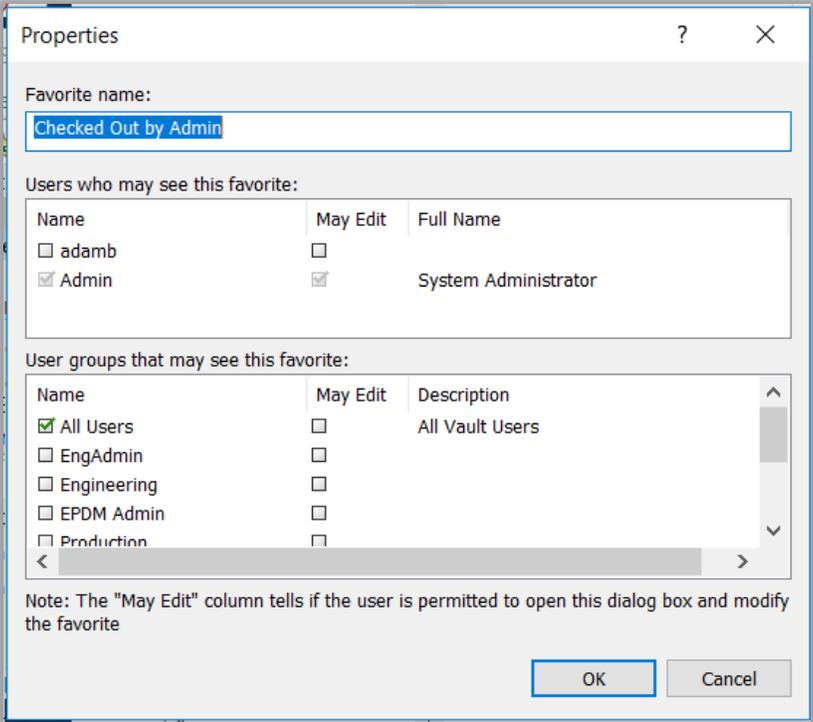
Creating Search Favorites



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



Creating Search Favorites

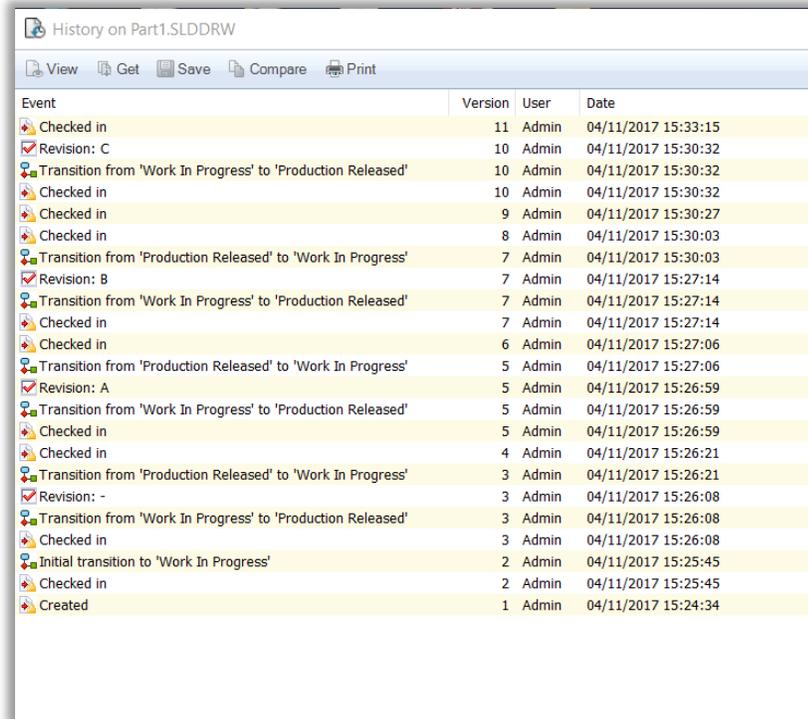


- Favorite(s) show up in multiple places.

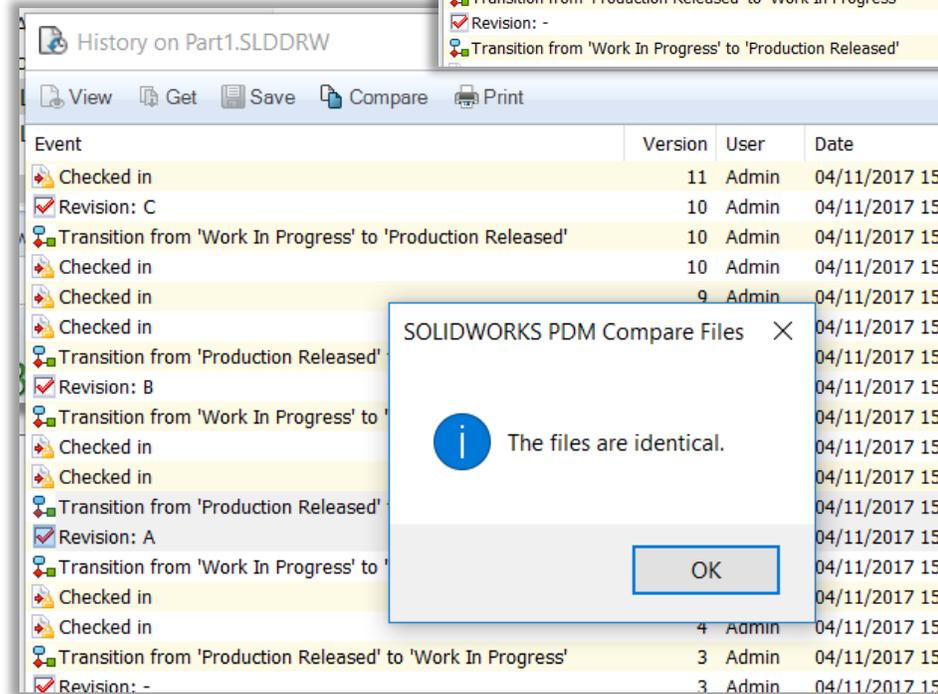


Compare Versions

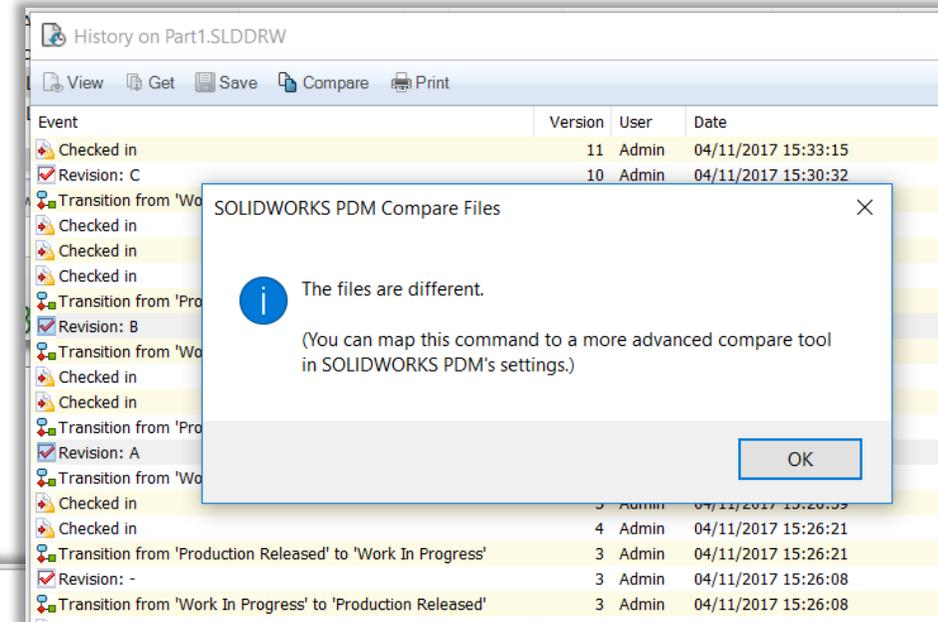
- Right-click in explorer, “History”
 - Pick two events, select “Compare”



Event	Version	User	Date
Checked in	11	Admin	04/11/2017 15:33:15
Revision: C	10	Admin	04/11/2017 15:30:32
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 15:30:27
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
Checked in	2	Admin	04/11/2017 15:25:45
Created	1	Admin	04/11/2017 15:24:34



Event	Version	User	Date
Checked in	11	Admin	04/11/2017 15:33:15
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Transition from 'Work In Progress' to 'Production Released'	10	Admin	04/11/2017 15:30:32
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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
Checked in	2	Admin	04/11/2017 15:25:45
Created	1	Admin	04/11/2017 15:24:34



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Initial transition to 'Work In Progress'	2	Admin	04/11/2017 15:25:45
Checked in	2	Admin	04/11/2017 15:25:45
Created	1	Admin	04/11/2017 15:24:34



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

Type: 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

Copy Tree - C:\Vaults\E3D\Projects\P-00001\CAD Files\side_table_shelf_and_burners.SLDASM

Default Destination: C:\Vaults\E3D\Projects\P-00001\CAD Files

Settings

Version to Use: Latest Referenced

Copy Type: Files Compressed Archive

Options: Include simulation Preserve relative paths
 Include drawings Regenerate serial number in cards
 Name drawings after their models

Transform Operations:
Add Prefix... Add Suffix...
Rename with serial number...
Replace...

Filter Display = in All Columns

Warnings: 1 Show All Levels

Type	File Name	Warnings	Copy	Version	C...	Found In	Destination Folder Path	Target File Name	State
Folder	side_table_shelf_and_burners.SLDASM	The file is not rebuilt	<input checked="" type="checkbox"/>	2/2		C:\Vault...AD Files	C:\Vaults\E3D\Projects\P-00001\CAD Files\	12406.SLDASM	Work In Progress
Folder	double_range_burner.SLDASM		<input type="checkbox"/>	2/2		C:\Vault...AD Files	<excluded>	<excluded>	Work In Progress
File	Lofted Control Knob.SLDPRT		<input type="checkbox"/>	2/2		C:\Vault...AD Files	<excluded>	<excluded>	Work In Progress
File	long_burner_tube.SLDPRT		<input type="checkbox"/>	2/2		C:\Vault...AD Files	<excluded>	<excluded>	Work In Progress
Folder	range_burner.SLDASM		<input type="checkbox"/>	2/2		C:\Vault...AD Files	<excluded>	<excluded>	Work In Progress
File	range_burner_bowl.SLDPRT		<input type="checkbox"/>	2/2		C:\Vault...AD Files	<excluded>	<excluded>	Work In Progress
File	range_burner_head.SLDPRT		<input type="checkbox"/>	2/2		C:\Vault...AD Files	<excluded>	<excluded>	Work In Progress
File	range_burner_gnill.SLDPRT		<input type="checkbox"/>	2/2		C:\Vault...AD Files	<excluded>	<excluded>	Work In Progress
File	range_burner_insert.SLDPRT		<input type="checkbox"/>	2/2		C:\Vault...AD Files	<excluded>	<excluded>	Work In Progress
File	range_burner_valve.SLDPRT		<input type="checkbox"/>	2/2		C:\Vault...AD Files	<excluded>	<excluded>	Work In Progress
File	range_burner_valve_feed.SLDPRT		<input type="checkbox"/>	2/2		C:\Vault...AD Files	<excluded>	<excluded>	Work In Progress
File	short_burner_tube.SLDPRT		<input type="checkbox"/>	2/2		C:\Vault...AD Files	<excluded>	<excluded>	Work In Progress
File	side_table_shelf_for_burner.SLDPRT		<input checked="" type="checkbox"/>	2/2		C:\Vault...AD Files	C:\Vaults\E3D\Projects\P-00001\CAD Files\	12407.SLDPRT	Work In Progress

Check-in on Copy:

Total to Copy: 2 Files (1) (1) (0) (0)

Reset All Copy Cancel Help

Tools

- Favorite Searches >
- Search Cards >
- Notify >
- Inbox
- Administrative Actions...
- Branch...
- Associated Branches >
- Merge...
- Copy Tree...**
- Move Tree...
- Clear Local Cache
- Items
- Work Off-line
- Report Generator
- Administration
- Update References...



Move Tree

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

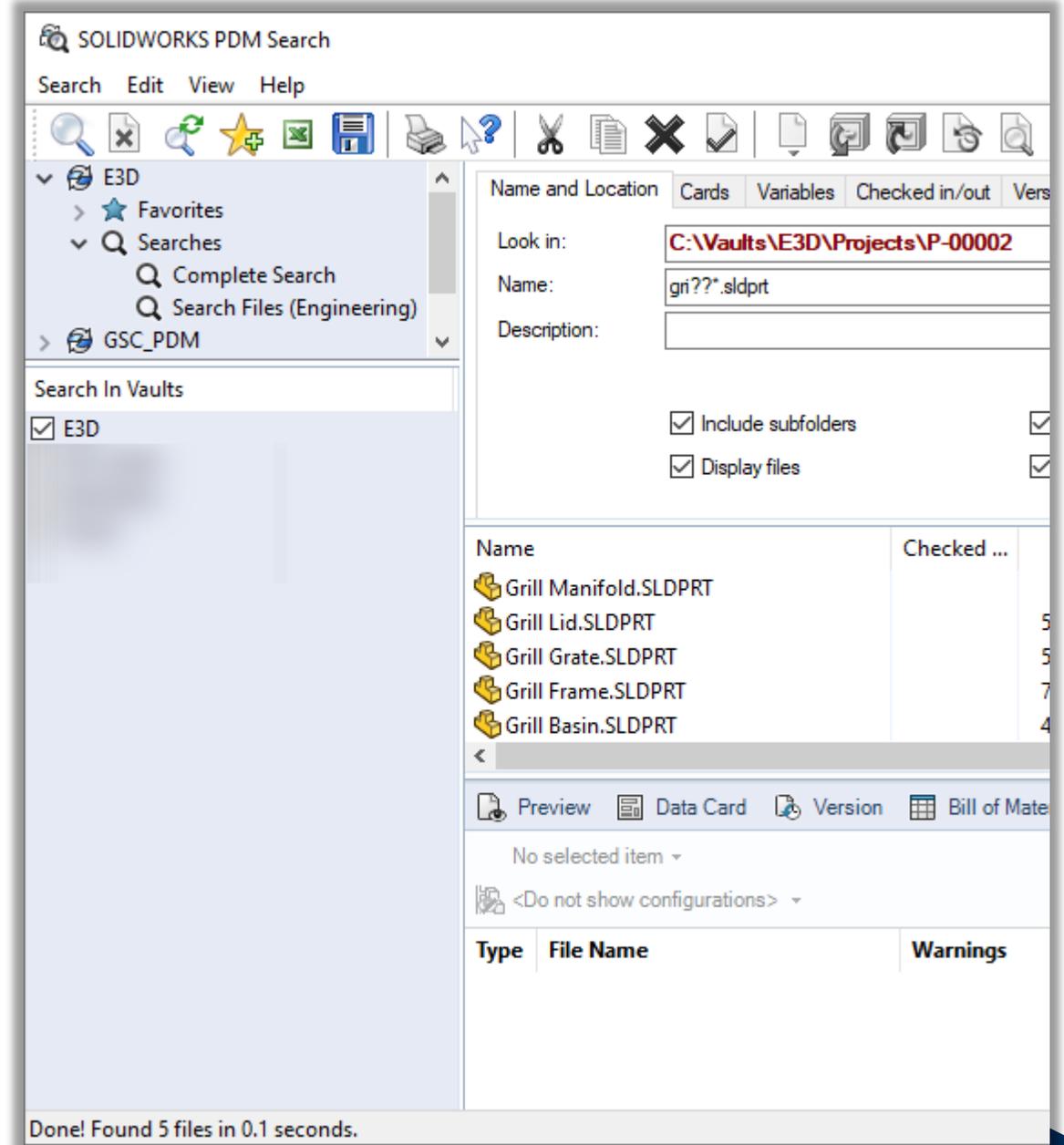
The screenshot displays a software interface with two main windows. The primary window, titled "History on BRKT ASSY,SAMPLE,M10.SLDASM", shows a table of file events. The table has columns for "Event", "Version", "User", and "Date". The events include a move operation, several "Checked in" actions, and revision updates. Below the table is a "Details" section with input fields for Name, User, Version, Date, and a Comment box. To the right, a "Transform Operations" dialog is open, showing a list of files with their target names and states. The dialog includes buttons for "Add Prefix...", "Add Suffix...", "Rename with serial number...", and "Replace...". At the bottom of the interface, there are buttons for "Update References...", "Update", "Help", "Close", "Reset All", "Move", "Cancel", and "Help".

Event	Version	User	Date
Moved from 'C:\Vaults\GSC_PDM\Test Lab' to 'C:\Vaults\GSC_PDM\SWW Model Mania\Test'		Admin	10/01/2019 09:20:49
Revision: F	8	Admin	09/13/2019 20:15:49
Checked in	8	Admin	09/13/2019 20:15:49
Checked in	7	Admin	09/13/2019 20:14:51
Checked in	6	Admin	03/12/2019 15:54:58
Checked in	5	Admin	03/12/2019 15:34:00
Revision: C	4	Admin	01/07/2019 08:54:38
Transition from 'Change Pending Approval' to 'Approved'	4	Admin	01/07/2019 08:54:38

Path	Target File Name	State
ts\P-00003\	side_table_shelf_and...	Work In Pr...
s\P-00001\CAD Files\	double_range_bu...	Work In Pr...
s\P-00001\CAD Files\	Lofted Control...	Work In Pr...
s\P-00001\CAD Files\	long_burner_t...	Work In Pr...
s\P-00001\CAD Files\	range_burner...	Work In Pr...
s\P-00001\CAD Files\	range_burn...	Work In Pr...
s\P-00001\CAD Files\	range_burn...	Work In Pr...
s\P-00001\CAD Files\	range_burner...	Work In Pr...
s\P-00001\CAD Files\	range_burner...	Work In Pr...
s\P-00001\CAD Files\	range_burner...	Work In Pr...
s\P-00001\CAD Files\	range_burner...	Work In Pr...
s\P-00001\CAD Files\	range_burner...	Work In Pr...
s\P-00001\CAD Files\	range_burner...	Work In Pr...
s\P-00001\CAD Files\	range_burner...	Work In Pr...
s\P-00001\CAD Files\	short_burner_t...	Work In Pr...
s\P-00001\CAD Files\	side_table_shelf_f...	Work In Pr...

Search Wildcards

- Refined search results
- Faster search results



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



Search Wildcards

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

Examples:

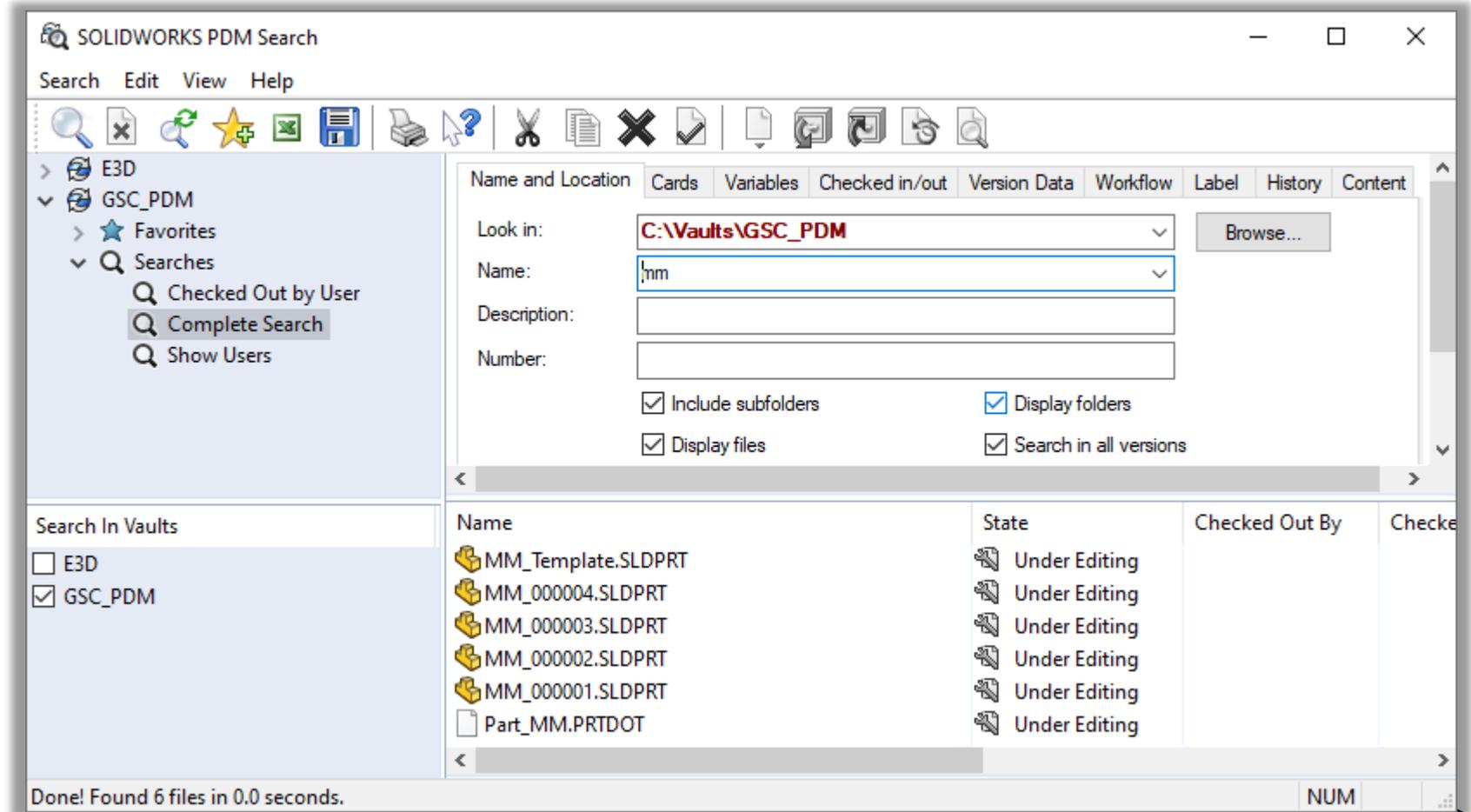
mm

mm

*mm

mm*

mm*template*.sldprt



Search Wildcards

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

Examples:

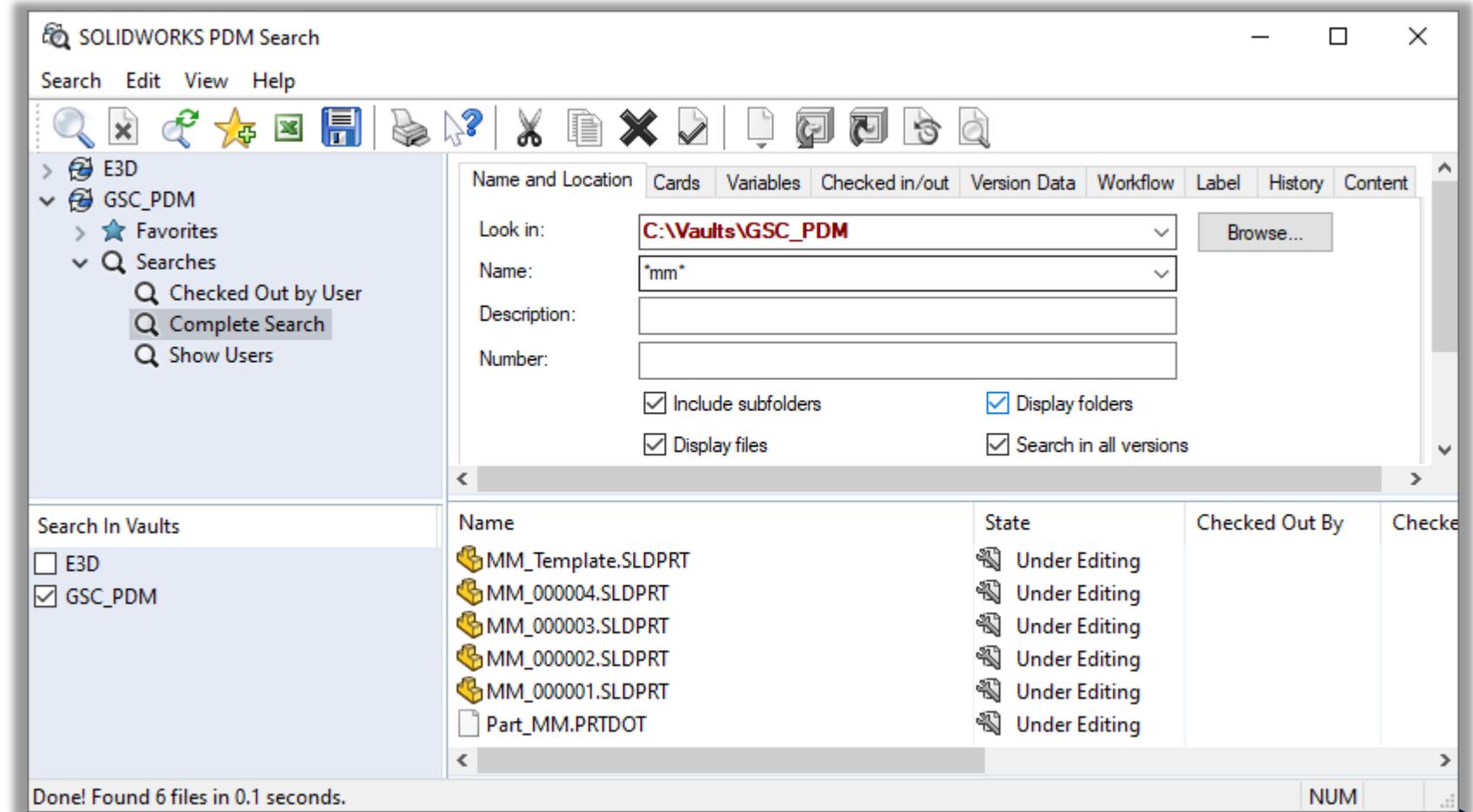
mm

mm

*mm

mm*

mm*template*.sldprt



Search Wildcards

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

Examples:

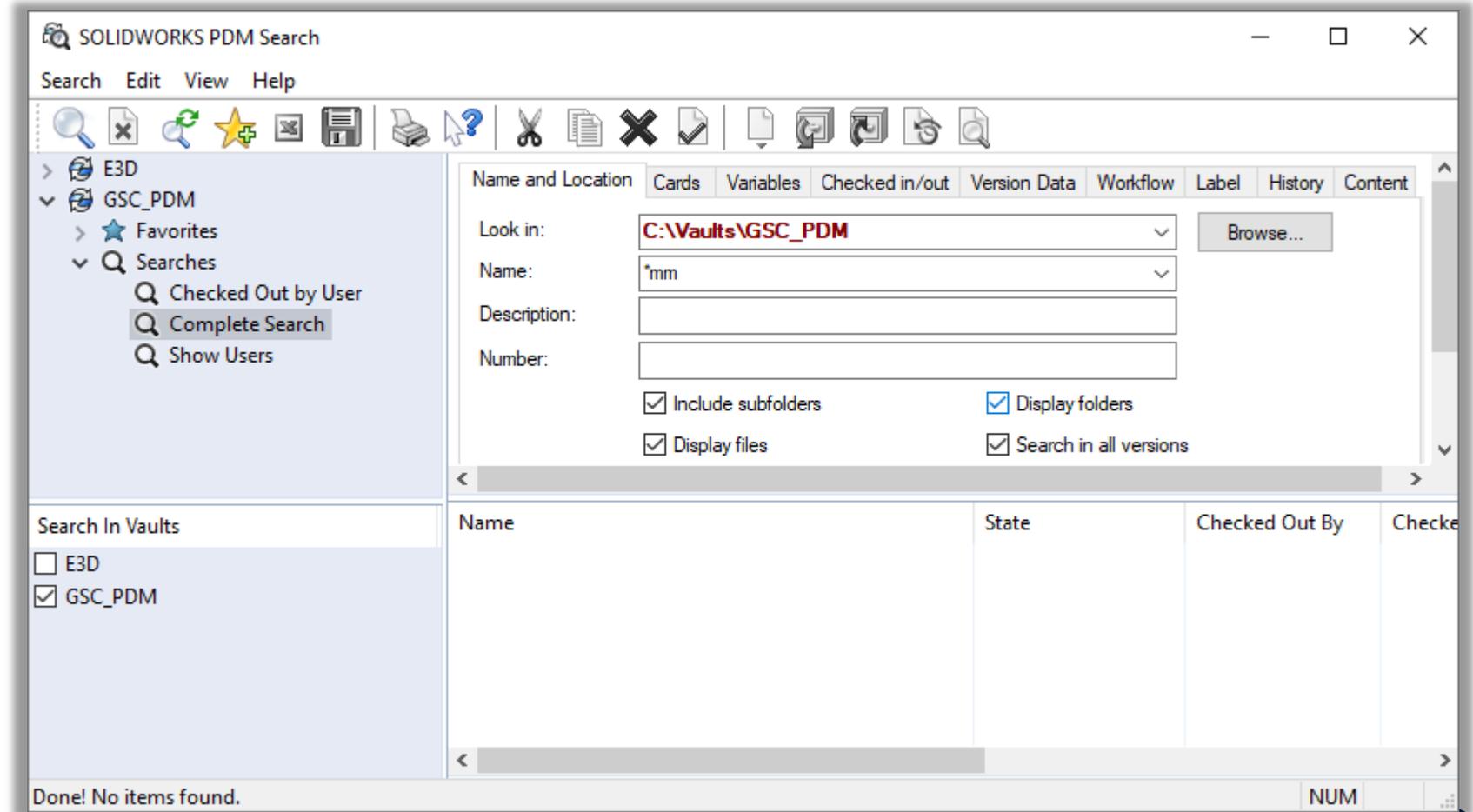
mm

mm

*mm

mm*

mm*template*.sldprt



Search Wildcards

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

Examples:

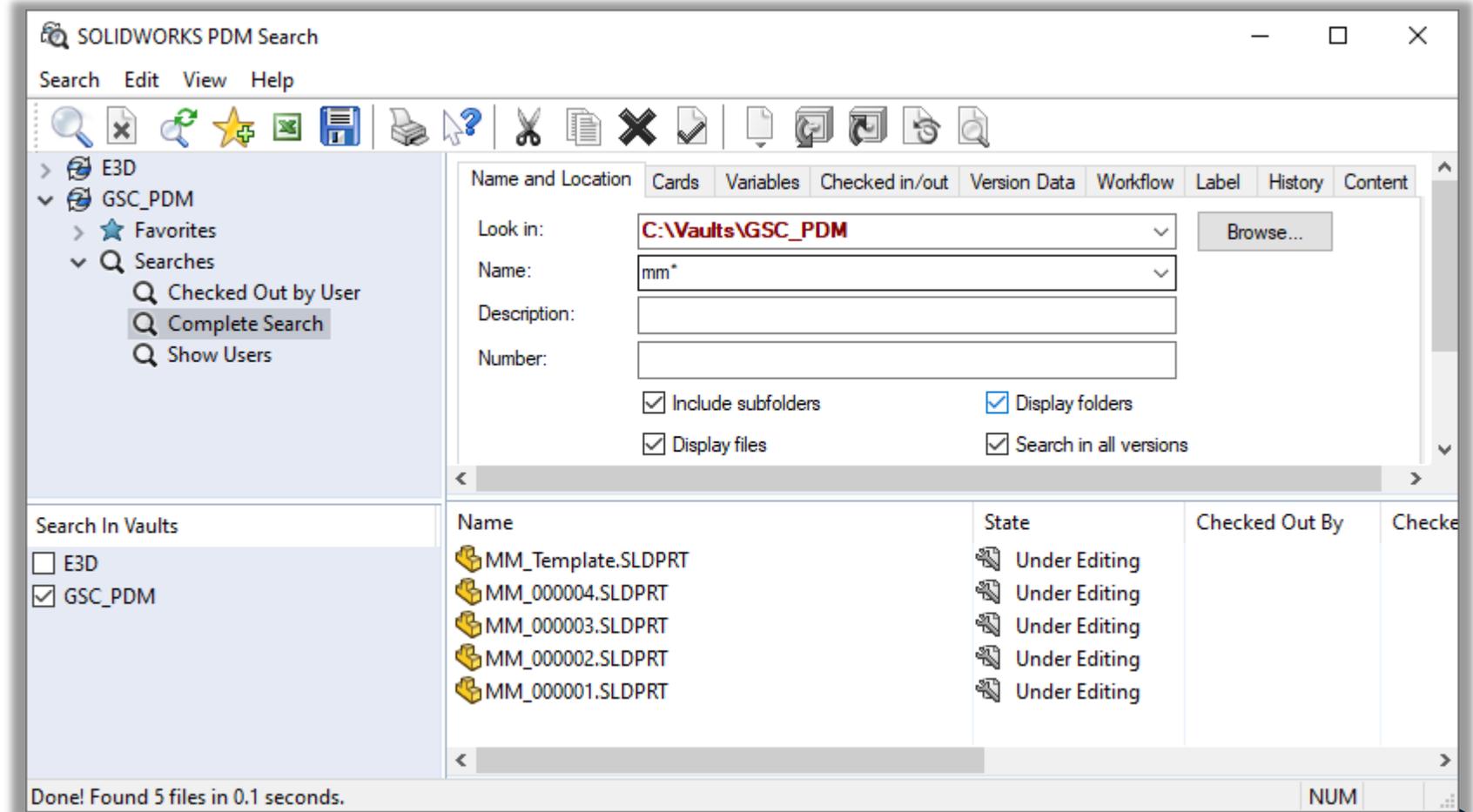
mm

mm

*mm

mm*

mm*template*.sldprt



Search Wildcards

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

Examples:

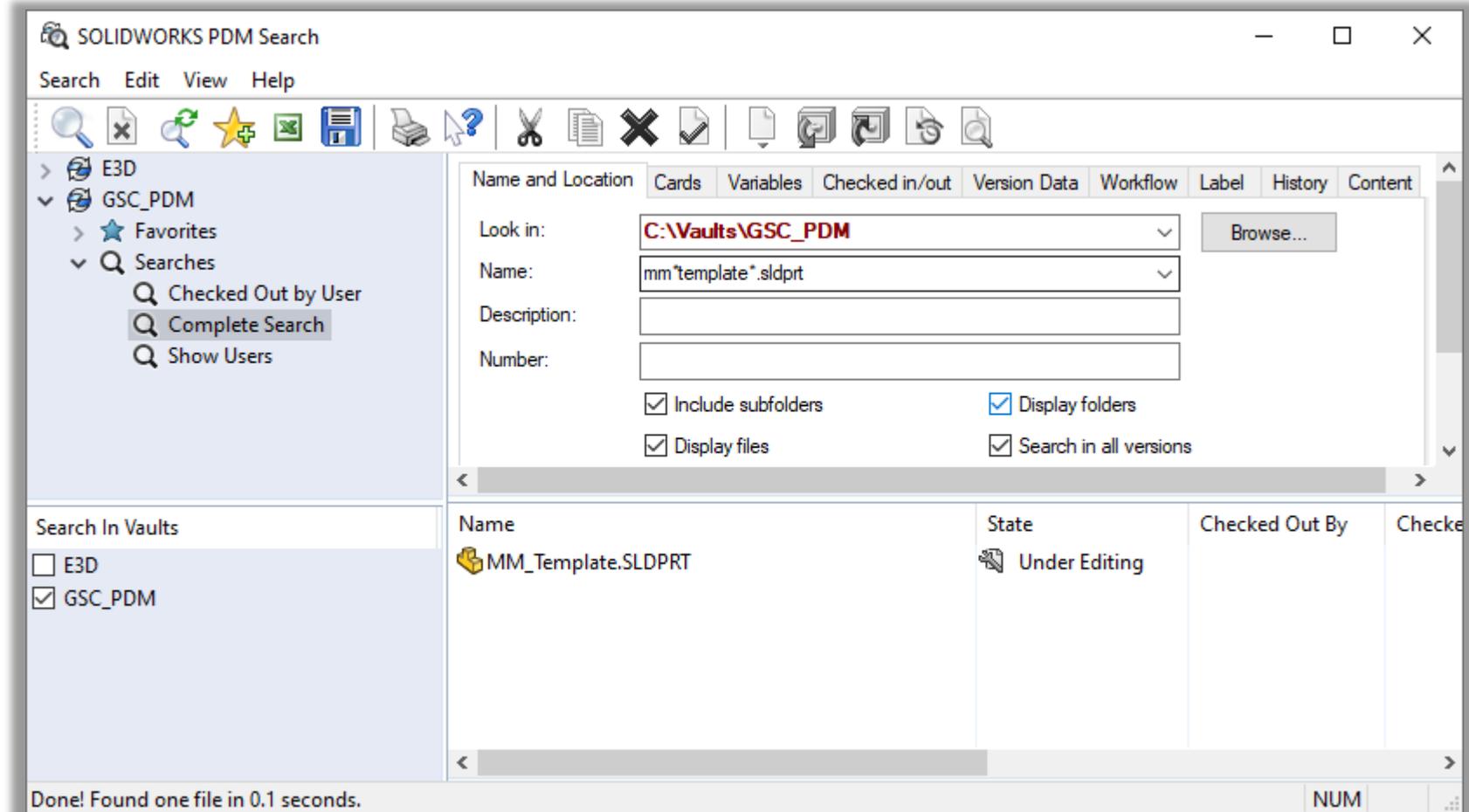
mm

mm

*mm

mm*

mm*template*.sldprt



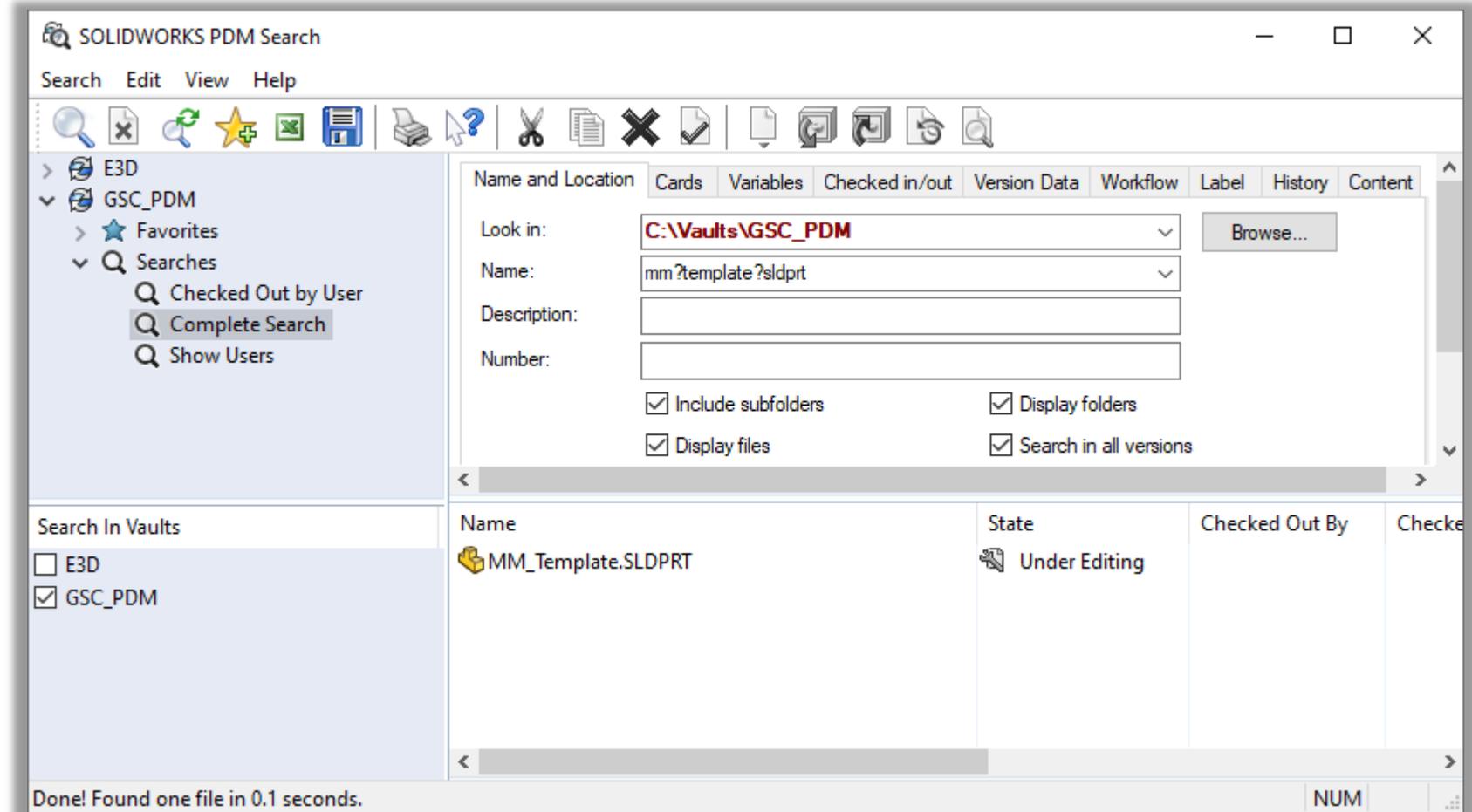
Search Wildcards

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

Examples:

mm?template?sldprt

mm?00000??sldprt



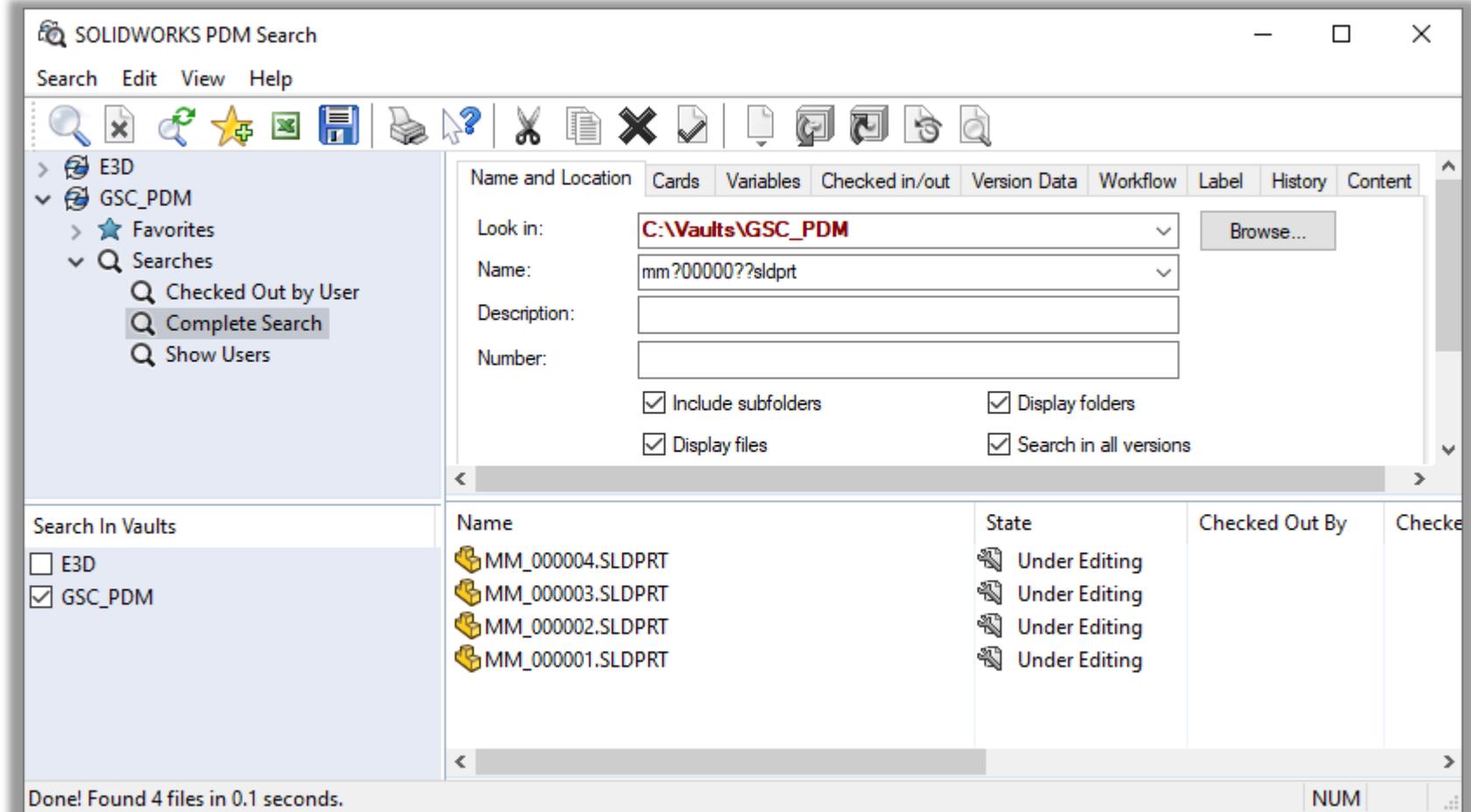
Search Wildcards

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

Examples:

mm?template?sldprt

mm?00000??sldprt



Search Wildcards

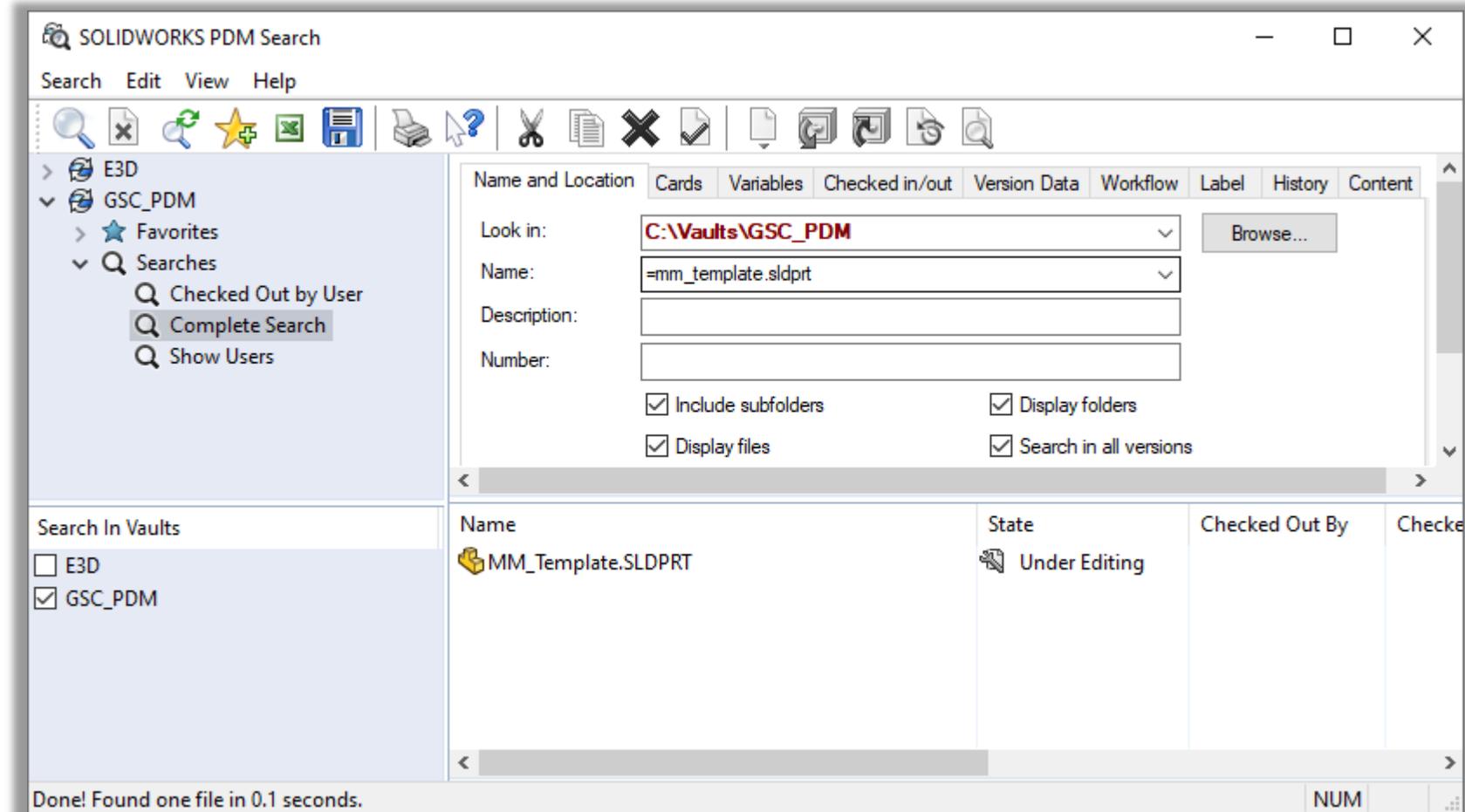
(=) - Exact entry

Examples:

=mm_template.sldprt

=weldment.sldprt

=weldment



Search Wildcards

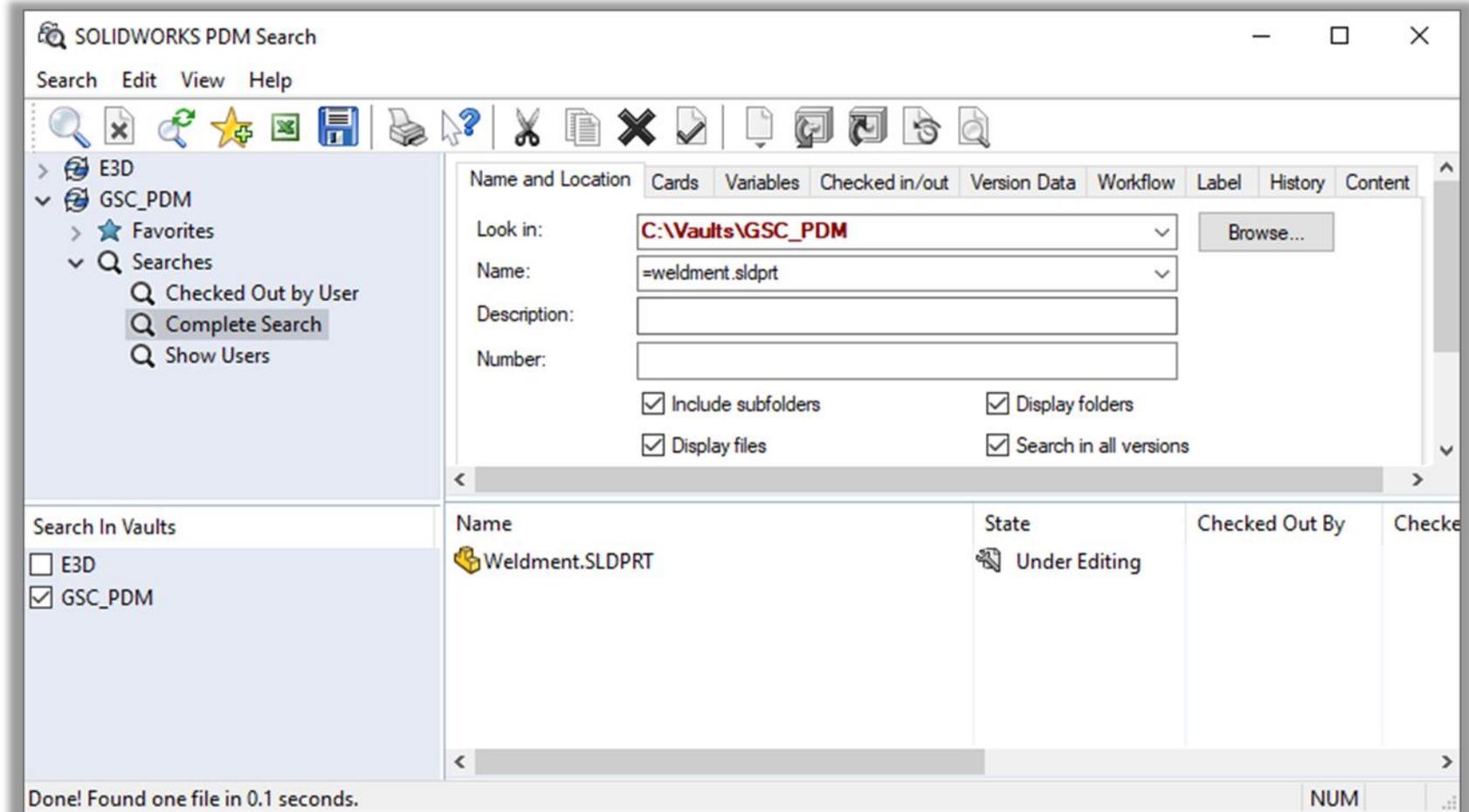
(=) - Exact entry

Examples:

=mm_template.sldprt

=weldment.sldprt

=weldment



Search Wildcards

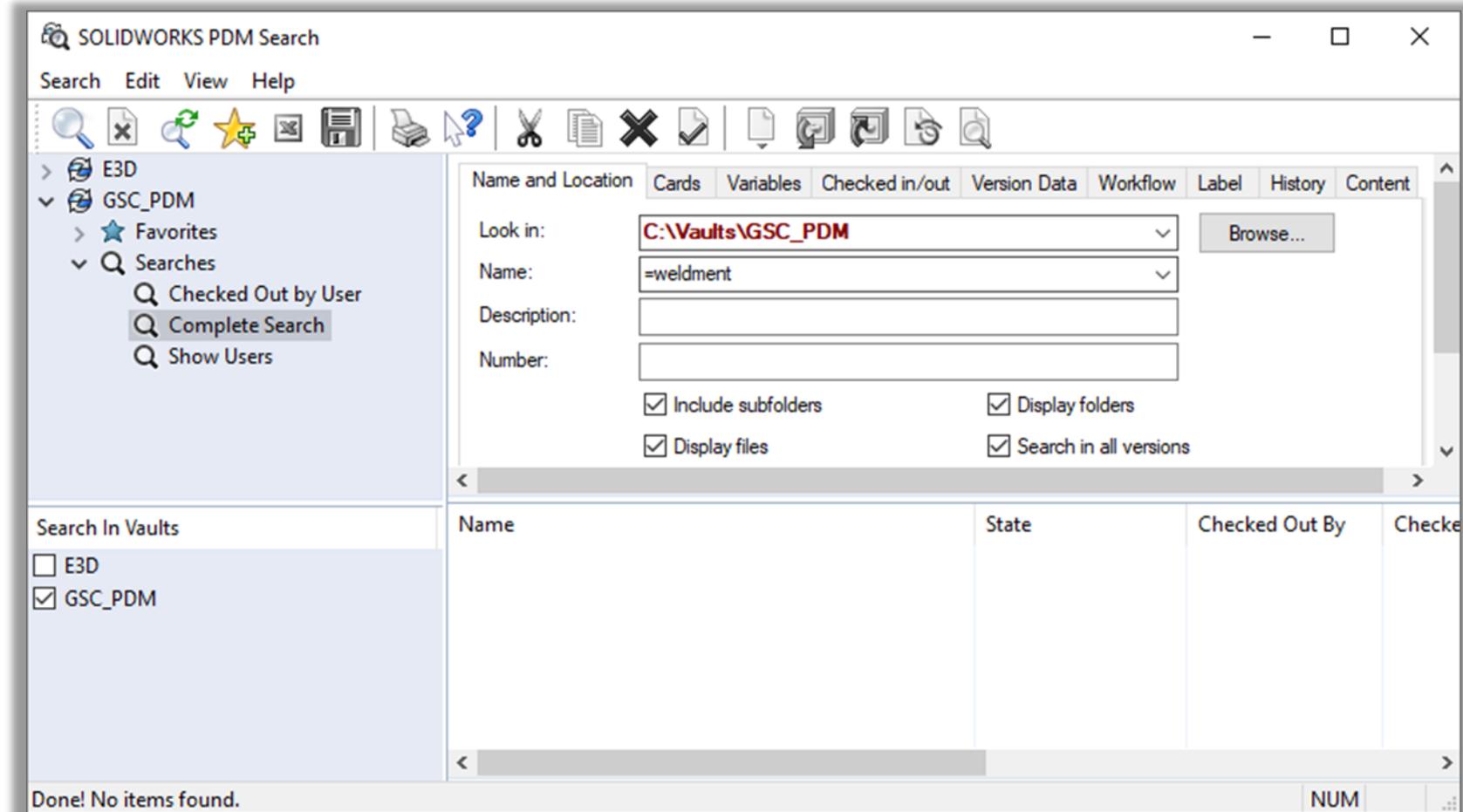
(=) - Exact entry

Examples:

=mm_template.sldprt

=weldment.sldprt

=weldment

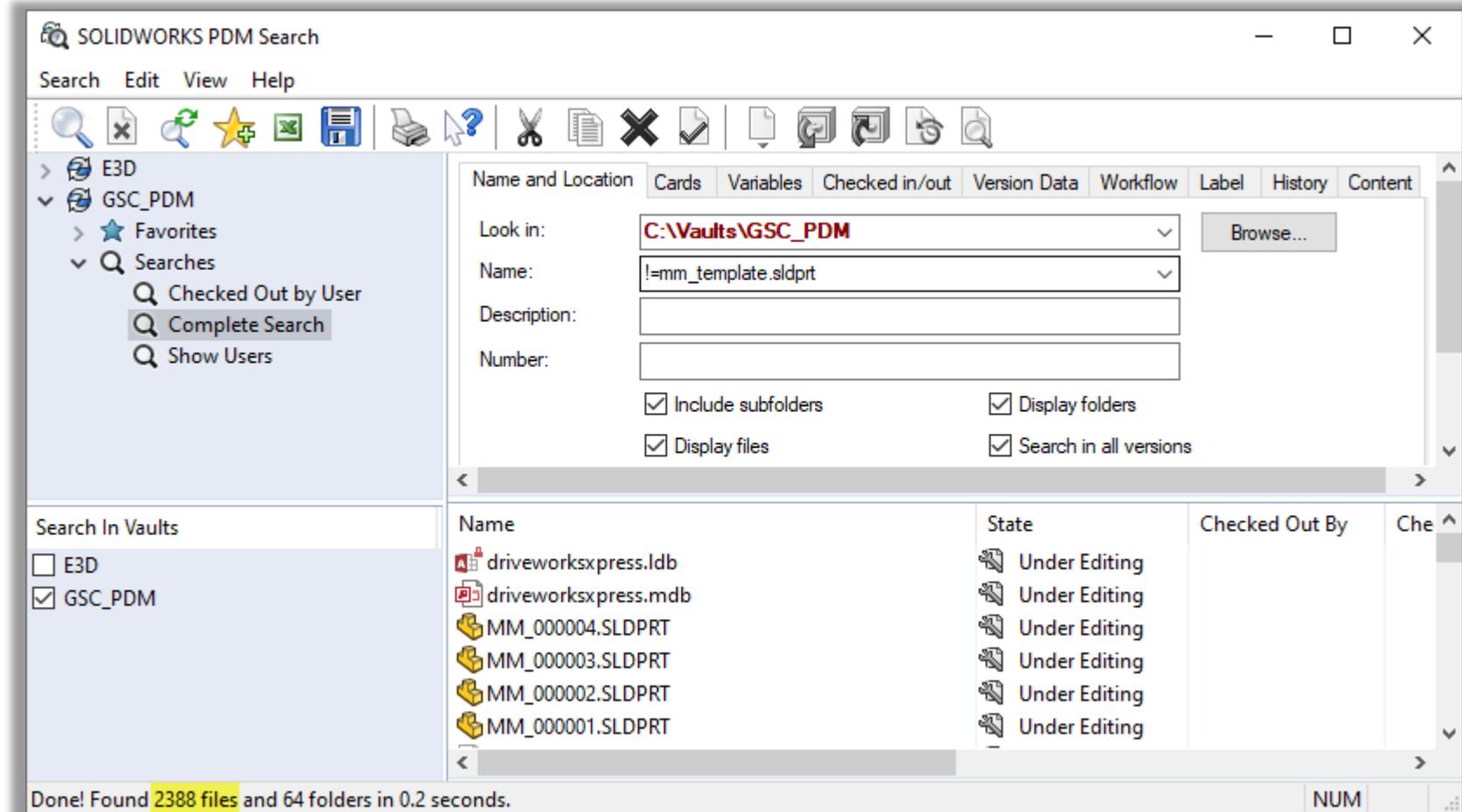


Search Wildcards

(!=) - Exclude exact entry

Example:

!=mm_template.sldprt



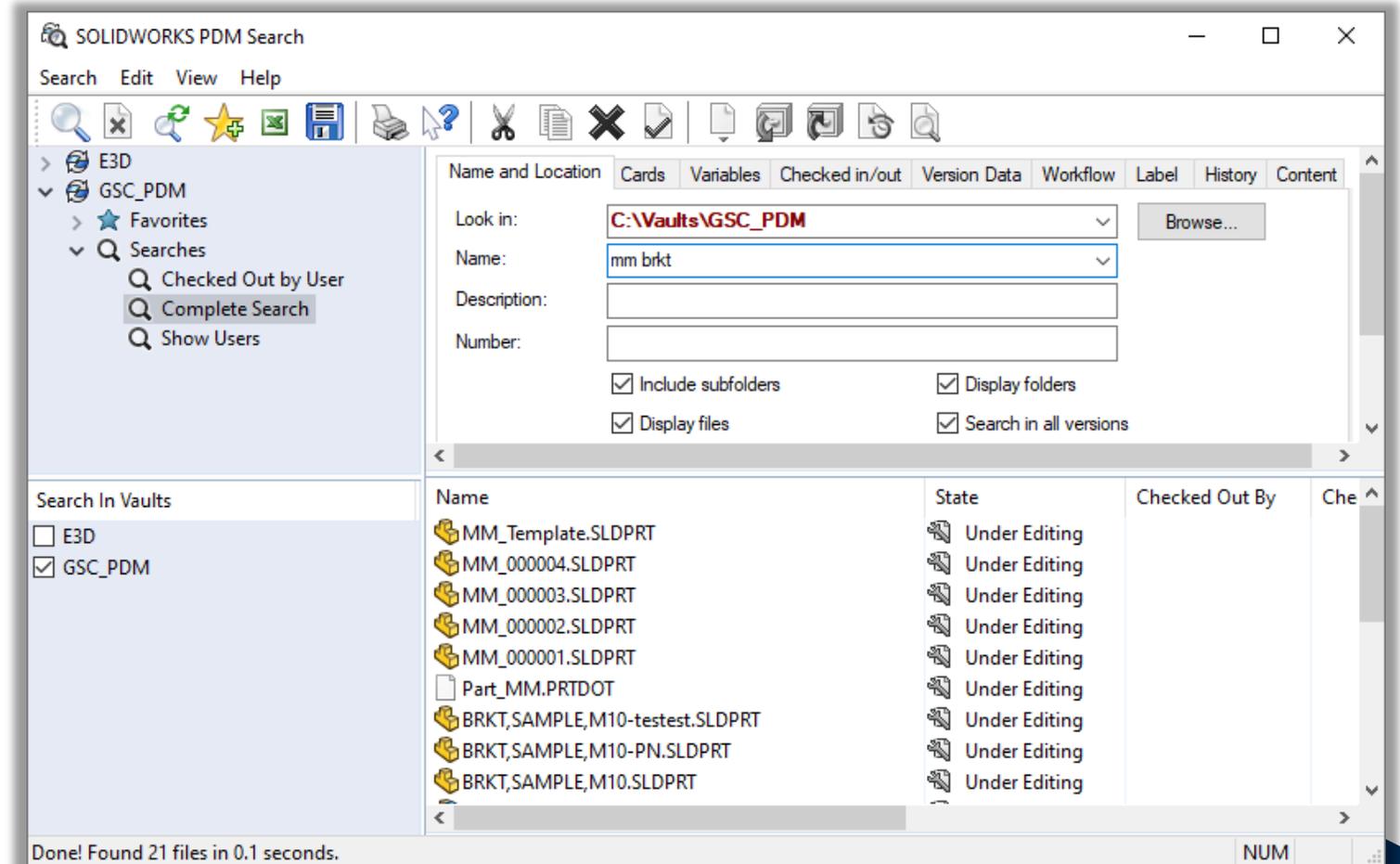
Search Wildcards

() - Acts as an “OR”

Examples:

mm brkt

tube part mm



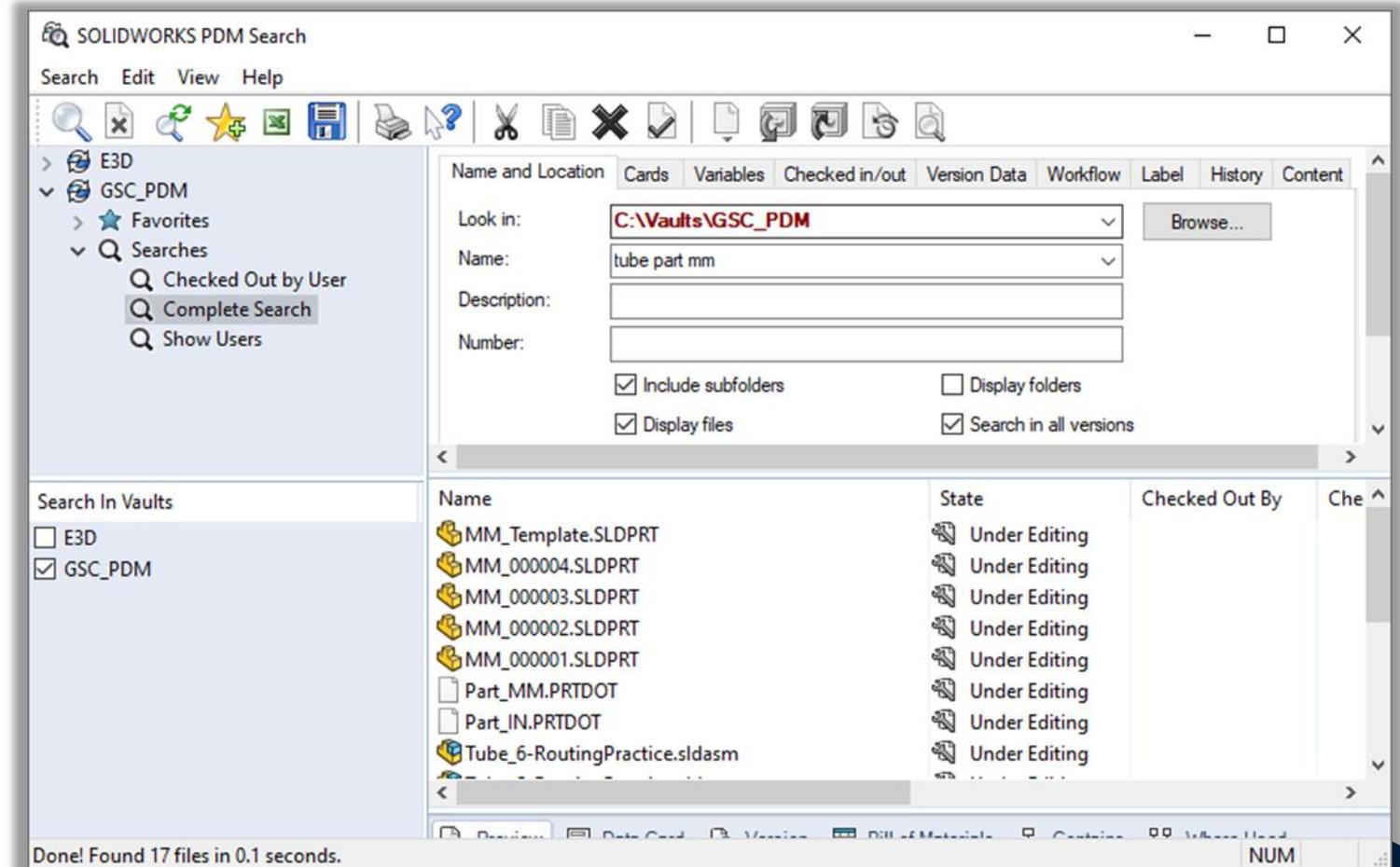
Search Wildcards

() - Acts as an “OR”

Examples:

mm brkt

tube part mm



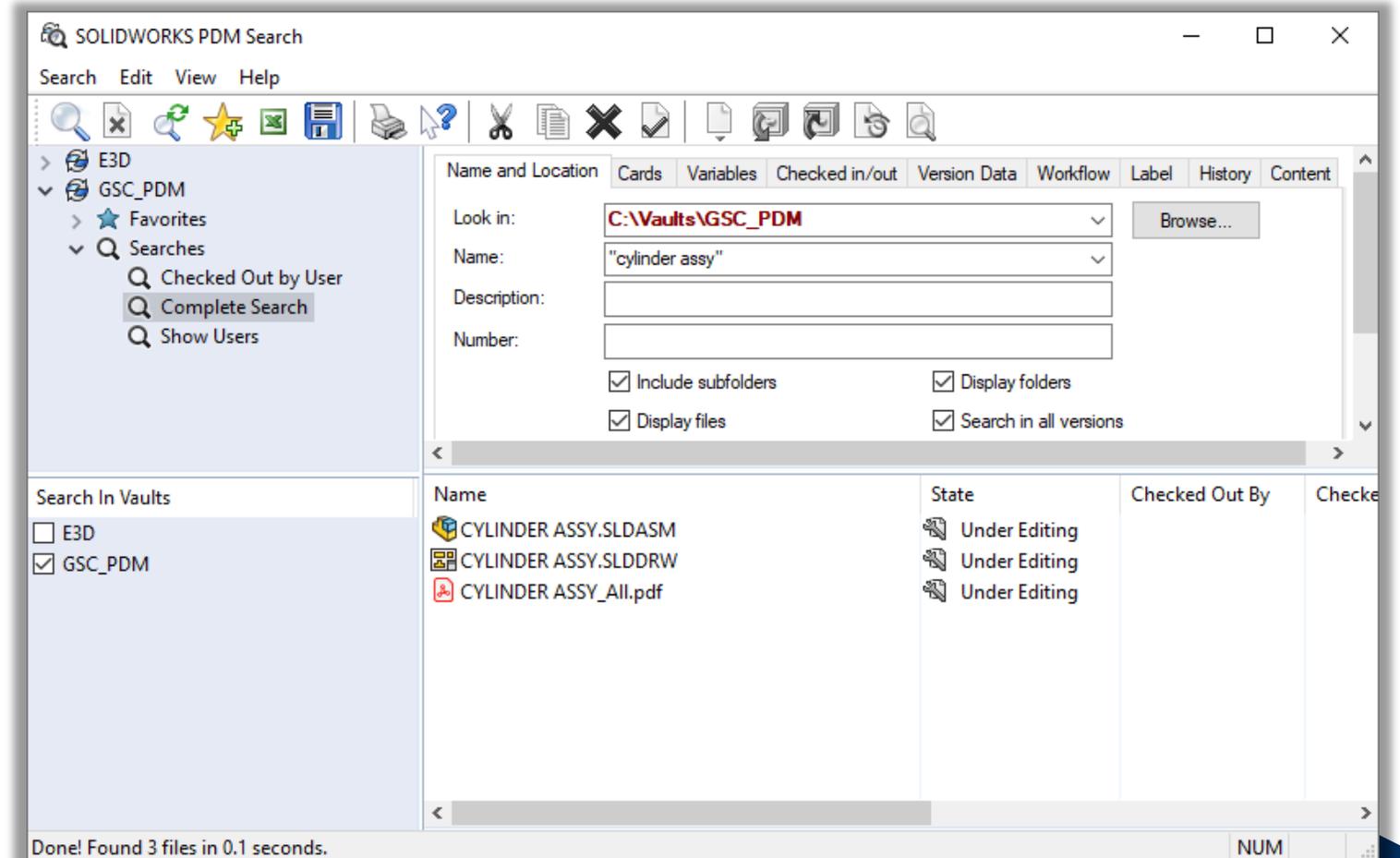
Search Wildcards

("") - Exact string of characters using spaces

Examples:

“cylinder assy”

“5 x 2”



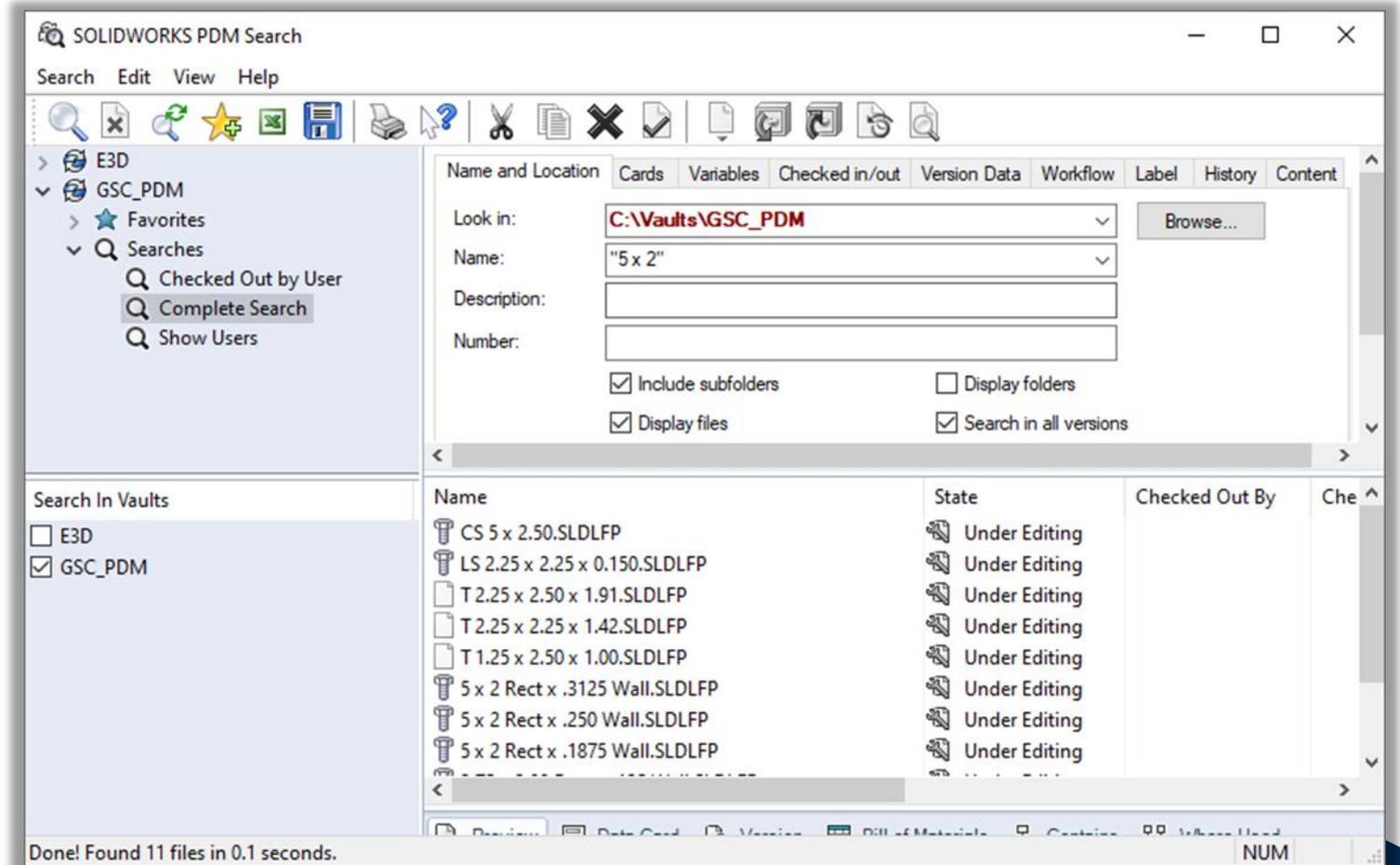
Search Wildcards

("") - Exact string of characters using spaces

Examples:

"cylinder assy"

"5 x 2"

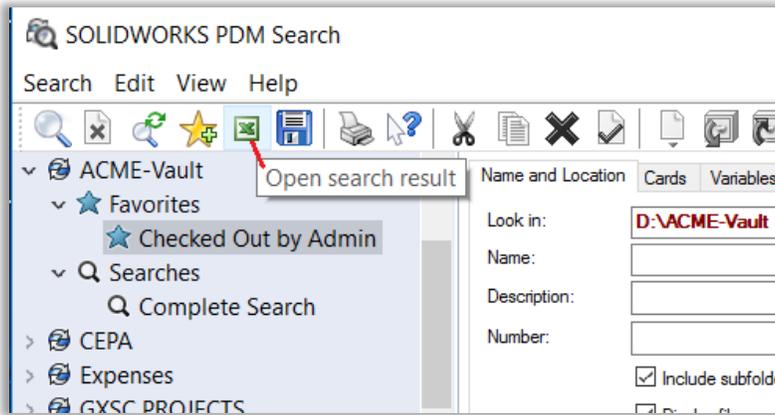


Search Wildcards

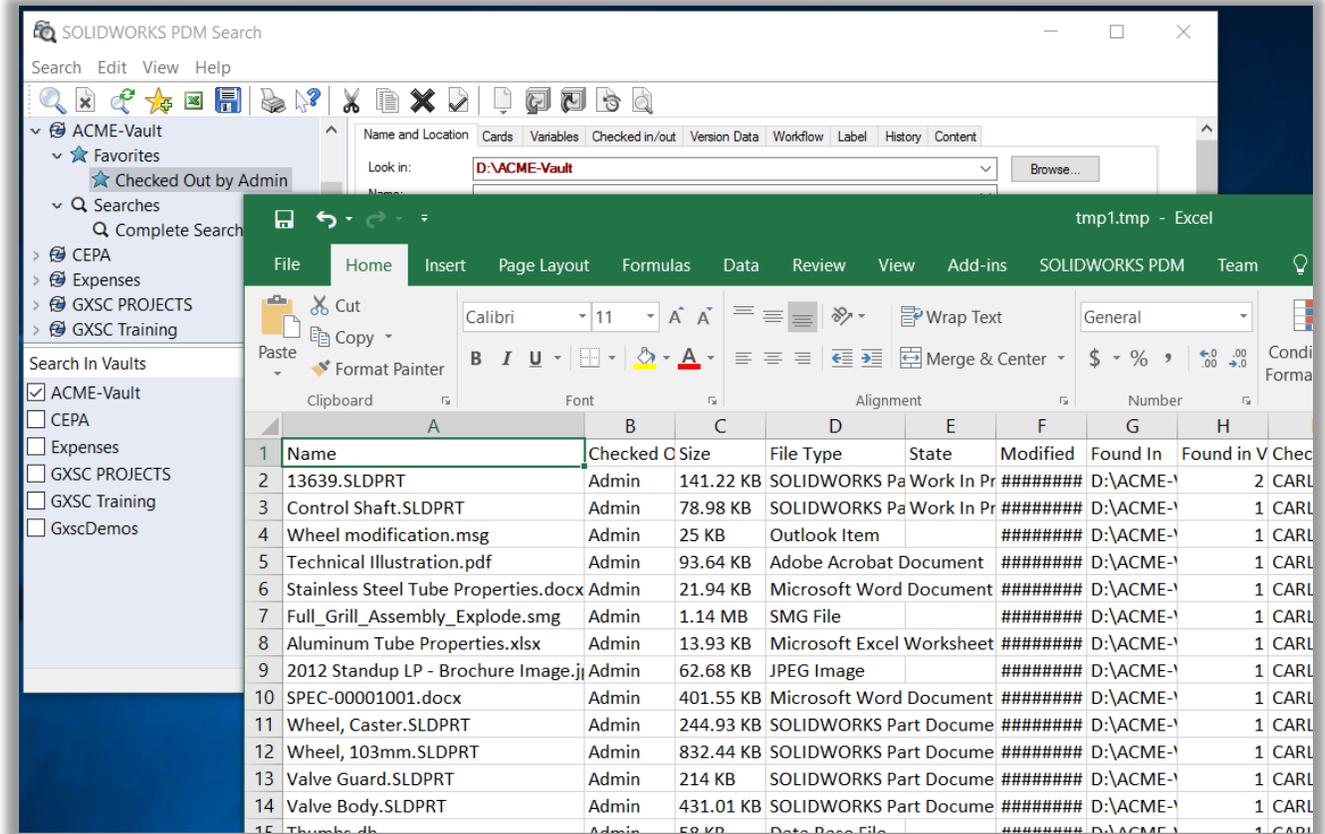
The elusive “AND” Wildcard/Operator



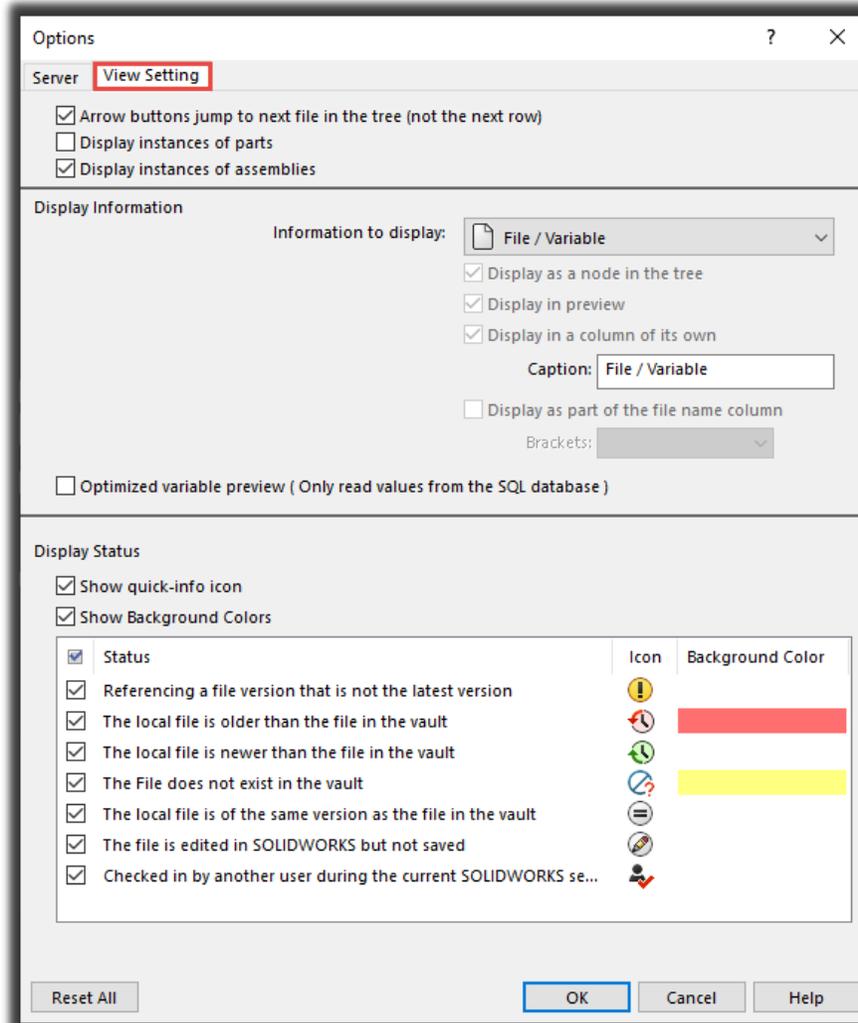
Exporting Search Results to Excel



- Open search results from toolbar.



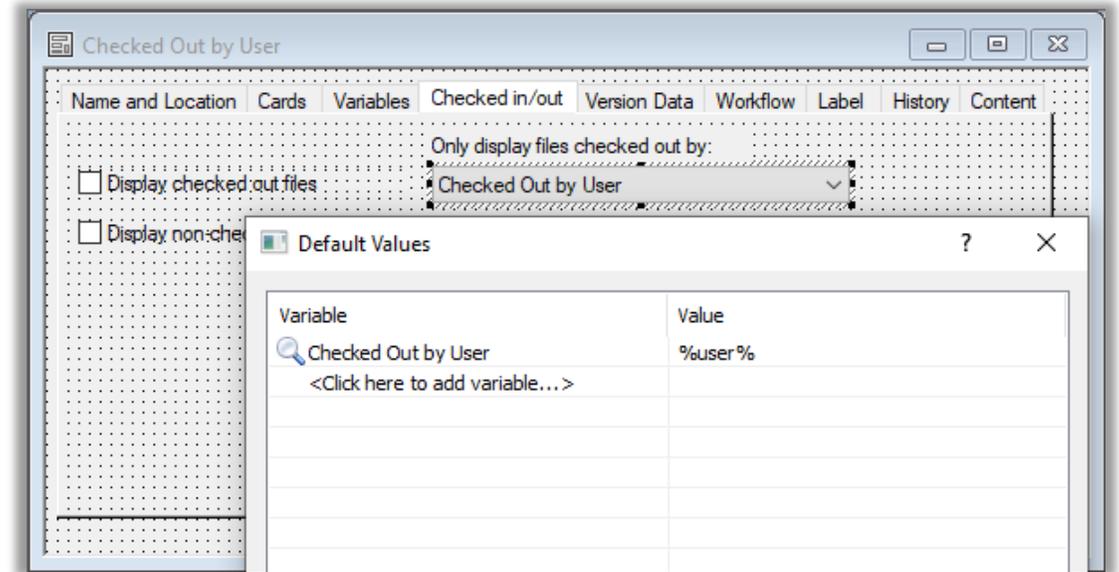
PDM Options in SOLIDWORKS



PDM 2019 Enhancements

Default Search Variable in Search Cards

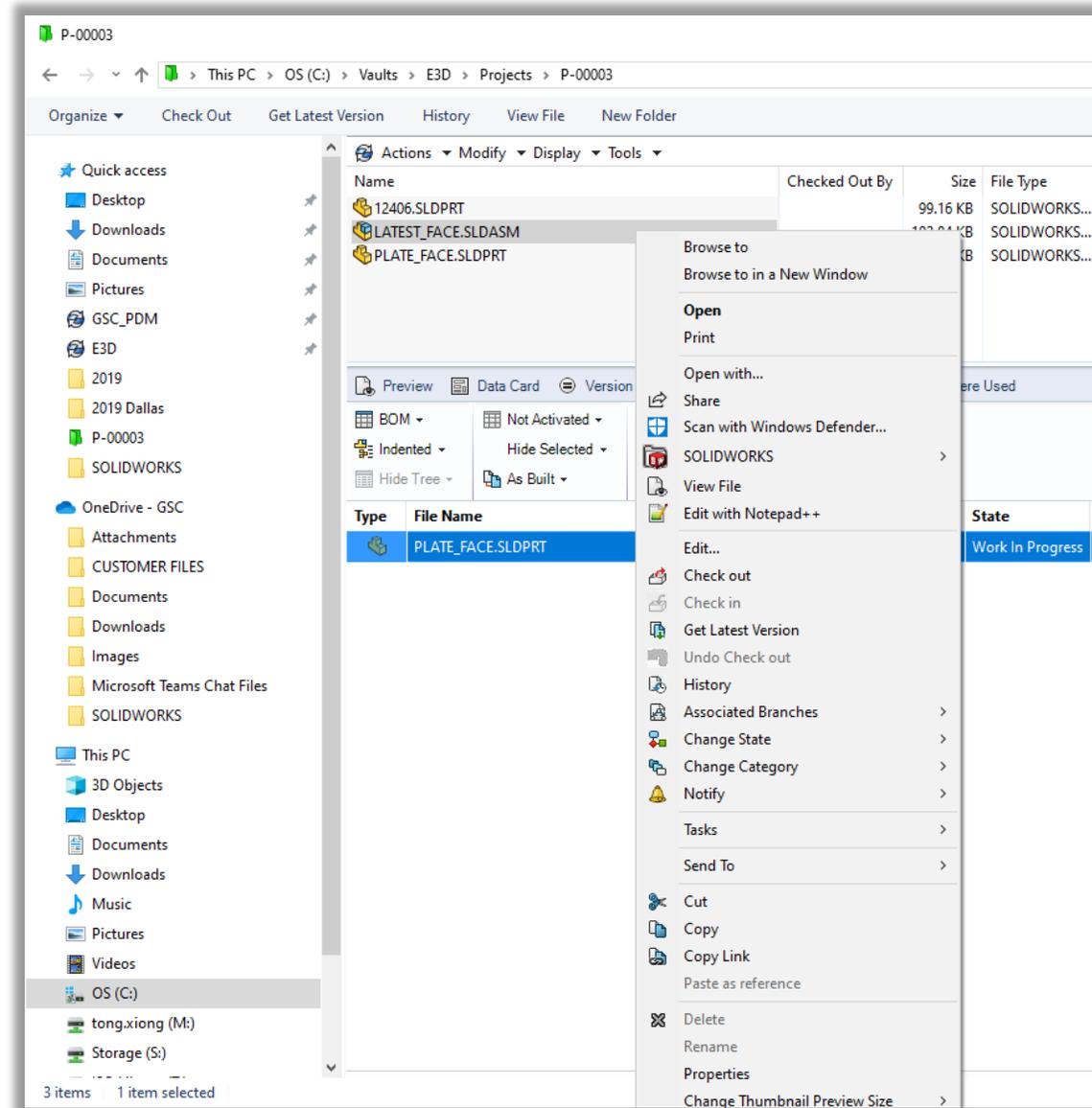
- Search cards default to logged in user
 - Variables such as:
 - Checked out by
 - Author
 - Created By
 - Transitions by User
 - Set default value to %user%
 - Reduces amount of search favorites created



PDM 2019 Enhancements

File Shortcut Menu

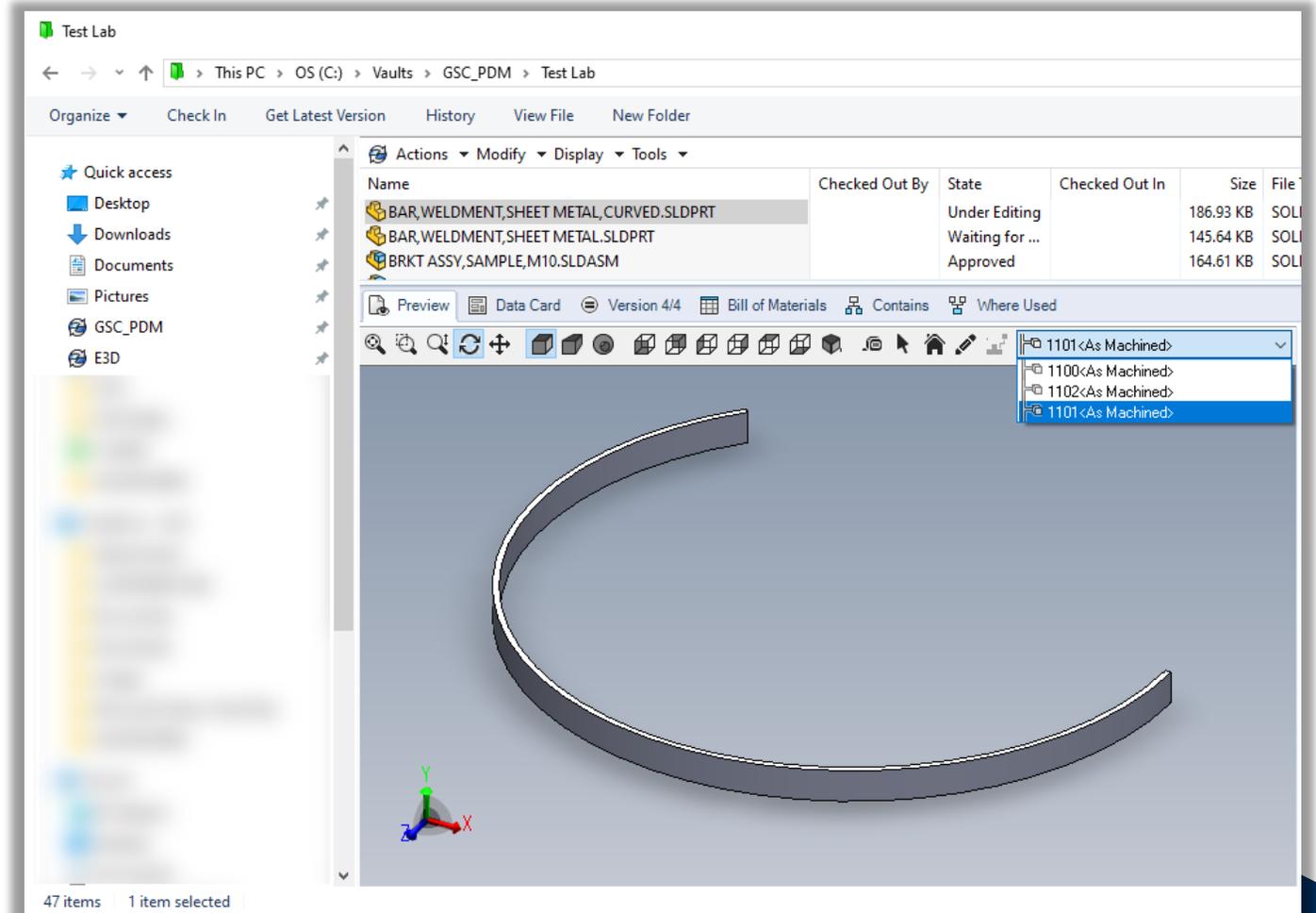
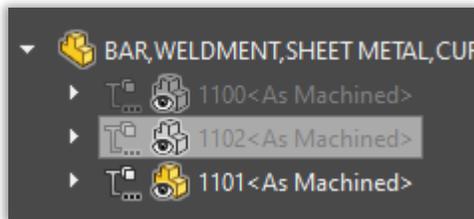
- Improved right mouse button context menu
- Available in tabs:
 - Bill of Materials
 - Contains
 - Where used



PDM 2019 Enhancements

Support for eDrawings Functionality

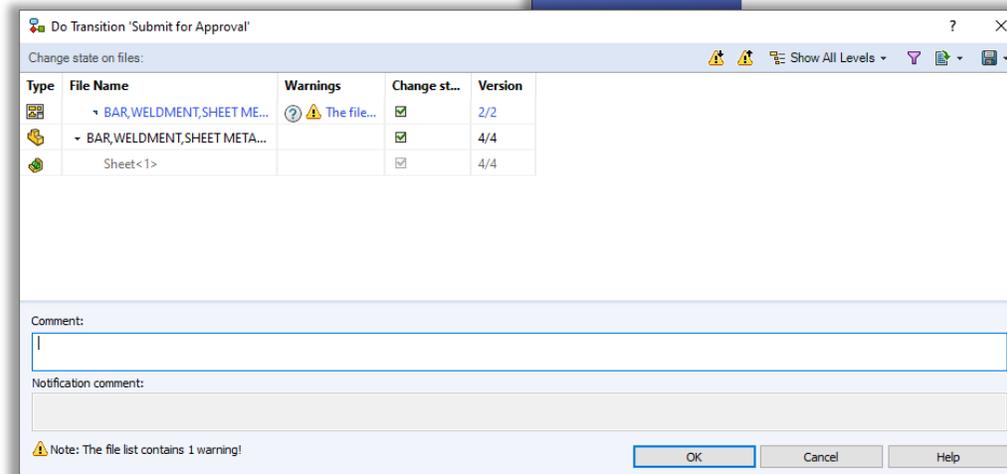
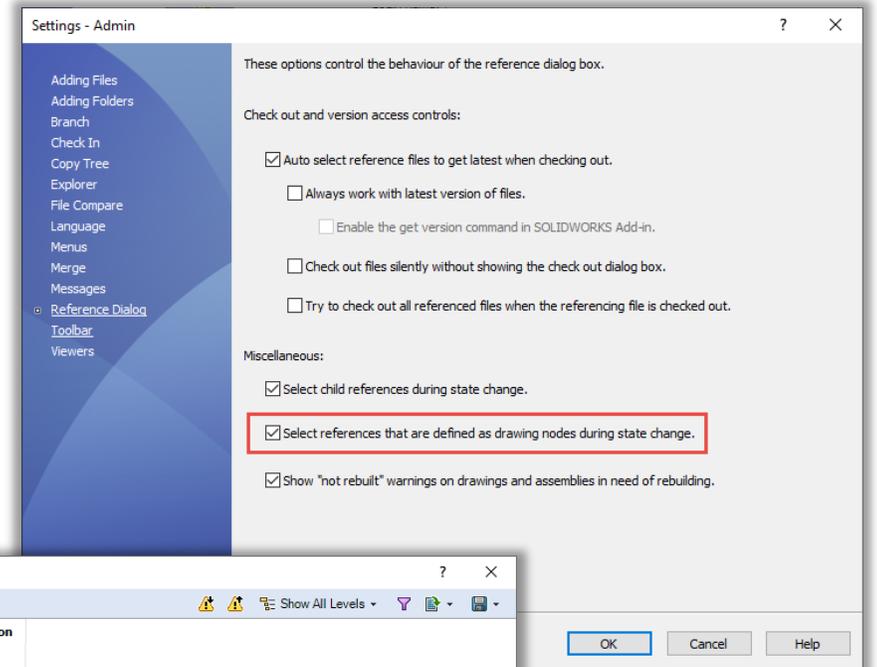
- Now supports configurations
- Switching between Drawings sheets



PDM 2019 Enhancements

Selection of Referenced Drawing Nodes During Change State

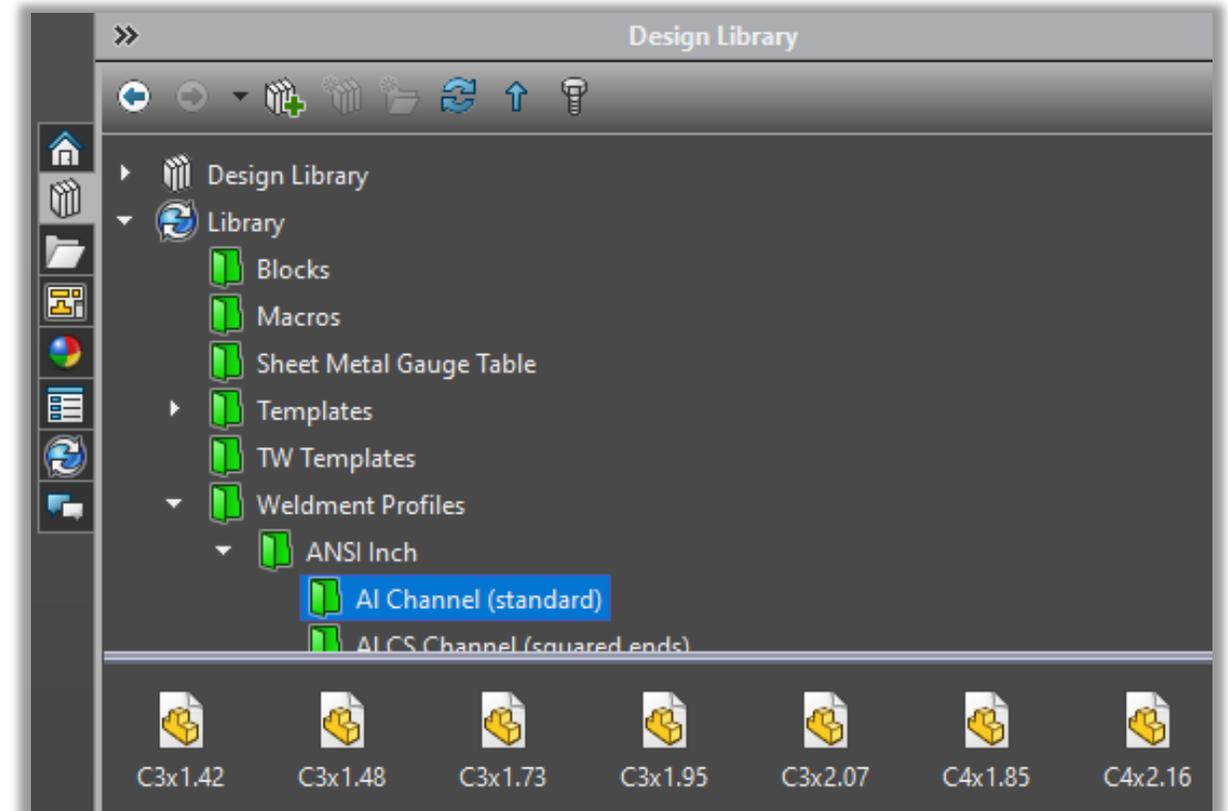
- New User Setting
 - Do not select references defined as drawing nodes during state change
- If active, will select the associated drawing(s) of the model during a state change



PDM 2019 Enhancements

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 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 place
in box by the door.

Thanks You!

Session Name: _____
Presenter Name: _____

Session Evaluation Form

1. Please take a few minutes to fill out this evaluation form. For each question, please rate how you agree with each statement. Graphics Systems Corporation values your feedback. Thank you for your participation.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
I found the content of the presentation informative.	<input type="radio"/>				
The presentation dealt with real-world issues I face today.	<input type="radio"/>				
The presentation was delivered clearly & was easy to understand.	<input type="radio"/>				
The presenter was knowledgeable about the subject presented.	<input type="radio"/>				
The presenter effectively addressed the questions asked.	<input type="radio"/>				
The presenter captivated the audience.	<input type="radio"/>				
The room and audio/video met my expectations.	<input type="radio"/>				
I would recommend this session to a friend or colleague.	<input type="radio"/>				
Overall, I was pleased I attended this session.	<input type="radio"/>				

2. I would like to receive more information about this topic.
 Yes No, Thank You

3. Please share any additional comments or suggestions:

4. Providing the following information is optional:
First Name: _____ Last Name: _____
Company: _____

