ENGINEER3D! TRAINING+TECHNOLOGY CONFERENCE

OCTOBER 2-3 MILWAUKEE, WI



PDM PROFESSIONAL TIPS FOR ADMINISTRATORS

GSC PDM APPLICATION ENGINEERS MAX KENT & JEN TAYLOR

DISCUSSION TOPICS

- COPY TREE
 - VARIABLE MAPPING
 - EXCLUDE
- BRANCH & MERGE
 - VARIABLE MAPPING
 - EXCLUDE
- LABELS HISTORY
- REPORT GENERATOR

- INPUT FORMULA
- GROUP SETTINGS
 - EXPLORER
 - REFERENCE DIALOG
- WHAT'S NEW PDM 2019
- PDM RESOURCES







COPY TREE

COPY FILE WITH REFERENCES TO CREATE A SECOND INSTANCE UNRELATED TO THE ORIGINAL

Transform Operations Version to Use CLabert. Otteferenced Capy Type: Compressed Archive @ Files Add Prefix. Options Indude simulation Preserve relative paths Rename with serie Datable drawings Regenerate serial number in cards Replace... Rame drawings after their models All Columns + Filter Display Warnings 17. 1 4 4 Target File Name File Name Warnings Found In Destination Folder Path (2) a. The file is not rebuilt. COPDM PRO ADMIN VAULT/Projects/PRJ-111168/Engineering 12406.SLDASM COPOM PRO ADMIN VAULTI/Projects)/PRJ-11116 - Head, Sub, SLDASM - 91 COPDM PRO ADMIN VAILET: Projects/PRJ-111100/Engineering 12411.SLDPRT APONI PRO ADMIN VAULT/Projects/PRS-11116 Head SLDFRT 3.7 12410.SLDPRT APOM PRO AOMIN VAULT/Projects/PEJ-11115 Lister Cover 9 COR 3/9 CODM PRO ADMIN VAULTOProjects/PRJ-111168/Engineering Lens SLDPRT -\$/5 COPDM PRO ADMIN VAULT/Projects/PRI-111168/Engineering 12409.SLDPRT APOM PRO ADMIN VAULT/Projects/PRI-111168 Ministure Buts SLOPE -1/1 CAPDM PRO ADMIN VAULTAProjects/PRU-111160/Engineering 12408.SLDPRT APOM PRO ADMIN VAULT/Protects/PRJ-11116 Reflector SLDPRT 3/9 C\PDM PRO ADMIN VAULT\Projects\PRJ-111168\Empireering 12407.SLDPRT CHPOM PRO ADMIN VAULT/Project/UPR2-11116 91

Default Destination

Setting

C:\/PDM PRO ADMIN VAULT\/Projects\/PRJ-111169\Engineering

USER ACTIONS

- SELECT ORIGINAL FILE
- TOOLS -> COPY TREE





COPY TREE



- INDEPENDENT ASSEMBLIES
- SAME MODEL DESIGN
- DIFFERENT VARIABLE VALUES

12430

Head_Sub

🤏 e 🏴	Default		
Part Info Cor	mments		
Par <mark>t Num</mark> ber:	Head_Sub	Revision B	
Description:	Head Sub-Assembly		
Material:		Weight:	Document State
Project Name:	FLASHLIGHT		Productio
Project Number:	PRJ-111168	🗾 🚺 🕓	Checked out



ocument Status urrent State: **'roduction Released** necked out by:

🤏 e 💾	Default		
Part Info Co	mments		
Part Number:	12430	Revision A	U GSC
Description:			
Material:		Weight:	Document Status
Project Name:	COPY TREE PROJECT		Work In Progress
P <mark>roj</mark> ect Number:	PRJ-111169	II 😼	Checked out by:



DEFINE HOW FILE CARD VARIABLES ARE AFFECTED

- CLEAR VALUE
- UPDATE VALUES
- DEFAULT OVERWRITES

INFORMATION	COMMENTS			
PART NUMBER	Part Number	RE		ric
DESCRIPTION	Description			
	Description 2			
MATERIAL:	Material	WEIGHT	Weight	REDRAW





CLEAR VALUES UPDATE VALUES

 >	Open New User Settings Permission Assignments
Log File	Export History Validate Logins



FILE TYPES * = WILDCARD



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SPECIAL VALUE – FILE NAME WITHOUT EXTENSION DEFAULT OVERWRITES

Part info Comm	ents		M CSC
Part Number.	Number	Revision Revision	
Description:	Description		
Material:	Material	Weight: Weight	Current State:
Project Name:	Project Name		<current state=""></current>
Project Number:	Project Number		Checked out by: <checked (full<="" by="" out="" td=""></checked>



Variable n	ame:
🗴 Numb	er v
	Variablaa
	vanables
/alidation-	
(Text lengt	th)
Min:	0
Max	0
Flags	
🗹 Read-c	only
Show ir	n Explorer
Multiline	e
Update	e s all configurations
Update	e es all configurations
Update	e s all configurations ue alue
Update	e s all configurations ue alue alue
Update ✓ Update Default valu ○ Text val ○ Specia ○ Folder	e s all configurations ue alue al value data card variable
Multiline Update Ofault valu O Text va O Specia Folder O File data	e es all configurations ue alue al value data card variable ta card variable
Update Update Update Ofault valu Ofext valu Ofext valu Official r Official r	e s all configurations ue alue al value data card variable ta card variable number
Multiline Multiline Ofault valu Ofault valu Ofault valu Ofext valu Ofext valu Ofer File dat Ofer serial r File name	e es all configurations ue alue alue data card variable ta card variable humber without extension
Update ↓ Update ↓ Update ↓ Text va ↓ Specia ↓ Folder ↓ File da ↓ Serial r File name	e es all configurations ue alue al value data card variable ta card variable number without extension
Update Update Update Ofault valu OText valu OFolder OFolder OFolder OFolder File dat Certal r File name	e es all configurations ue alue d value data card variable ta card variable number without extension
Multiline Multiline Update Ofault valu Text valu Specia Folder File dat Serial r File name Default Excluded	e es all configurations ue alue al value data card variable ta card variable number without extension ✓
 Multiline ✓ Update ✓ Update ○ Text vale ○ Text vale ○ Special ○ Folder ○ File date ○ Serial r File name ✓ Default Excluded a 	e alue alue data card variable ta card variable number vithout extension v
Multiline Multiline Update Ofault valu Text valu Specia Folder File dat Serial r File name Default Excluded of	e es all configurations
Multiline Update Update Update Text val Specia Folder File dat Serial r File name Update	e alue alue data card variable ta card variable number vithout extension v
Multiline	e es all configurations

FOLDER DATA CARD VARIABLE VARIABLE PROJECT NAME DEFAULT OVERWRITES

Part Info Comn	nents		M csc
Part Number:	Number	Revision Revision	
Description:	Description		
Material:	Material	Weight Weight	Document State:
Project Name:	Project Name		<current state=""></current>
Project Number:	Project Number	- 🐨 🕓	Checked out by: <checked (full<="" by="" out="" td=""></checked>



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EXCLUDE COPY TREE

GROUP PROPERTY – COPY TREE

EXCLUDES FILES IN SELECTED FOLDER(S) FROM ANY COPY TREE OPERATIONS



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BRANCH & MERGE



- AVAILABLE PDM PROFESSIONAL 2018
- PROVIDES USER ABILITY TO WORK ON MULTIPLE PROJECT VERSIONS AT ONCE TO TEST PROTOTYPE IDEAS
- CREATES INDEPENDENT COPY OF SOURCE FILE
- KEEPS RELATION BACK TO ORIGINAL PROJECT
 DATA





BRANCH & MERGE

- BRANCH THE DUPLICATION OF AN OBJECT UNDER REVISION CONTROL ALLOWING MODIFICATIONS TO HAPPEN IN PARALLEL
- MERGE RECONCILES MULTIPLE CHANGES MADE TO A VERSION-CONTROLED COLLECTION OF FILES RESULTING IN A SINGLE COLLECTION OF FILES THAT CONTAIN BOTH SETS OF CHANGES.



BRANCH

SIMILAR TO COPY TREE COPY FILE WITH REFERENCES TO CREATE A SECOND INSTANCE UNRELATED TO THE ORIGINAL

Branch Name*:	LENS BRANCH EXAMPLE								
Default Destination:	C:VPDM PRO ADMIN VAULTV	rojects/PRI-111170/Enginee	ning				4	Browse	
- Setting:									
Version to Use:	 Latest 	Referenced					Transform Operations:		
Options:	Include simulation		Preserve relative p	ath:			Add Prefix	Add Suffix	
	Disclude drawings		Regenerate serial	number in card	8		December with second countries		
	Name drawings after their	models					wendine with senis multiperty		
							Replace		
Filter Disater =		In All Columns *					9= Show	Allavois *	- 40
₹.									
pe Source File Name	e Warni	ngs	Branch	Version	Source File Found In	Branch File Found In	Branch File Name	Checked C	Dut B
Lens SI DOOT			N.	6/6	CARDMIPRO AD REngineering	CAPDM PRO ADMINIVA	12436 SL DPRT		

USER ACTIONS

- SELECT ORIGINAL FILE
- TOOLS -> BRANCH







HISTORY OF SOURCE FILE WILL SHOW EVENT FROM BRANCH OPERATION

b History on Lens ? \times 🗋 View 🕼 Get 🔚 Save 🌓 Compare 🚔 Print Comment \mathbf{A} Event Version User Date Stanched 'LENS BRANCH EXAMPLE' Branched To C:\PDM PRO ADMIN VAULT\Projects\PRJ-111170\Engineering\12436.SLDPRT 09/28/2019 10:07:53 6 Admin Revision: B 6 Admin 09/26/2019 13:12:39 Transition from 'Work In Progress' to 'Production Released 6 Admin 09/26/2019 13:12:39 Handler Checked in 09/26/2019 13:12:39 6 Admin Checked in 09/25/2019 15:41:58 5 Admin 0 Checked in 00/25/2010 15:37:23 4 ∆dmin Ł > Details Version: Name: User: Date: Update Comment: Help Close





ASSOCIATED BRANCHES

ASSOCIATED BRANCHES OPTION LISTS ALL THE **BRANCES THE FILE IS A PART OF**

Name	Check	0	Favorite Searches	5	Modified Checked C
Head_Sub		ā	Search Cards	- >>	09/26/2019 13:1
Nolder Lens Cover			Notify Inbox	2	09/25/2019 15:1 09/26/2019 13:1 09/26/2019 13:1
			Administrate Actions		
Preview E Data Card @	Versi	٨	Branch		ns 😰 Where Used
			Associated Branches	×	LENS BRANCH EXAMPLE
		B.,	Meme		1

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Associated Branches-LENS BRANCH EXAMPLE \times Created By: Admin Created On: r 🖪 09/28/2019 10:07:55 Type Source File Branch File C:\PDM PRO ADMIN VAULT\Projects\PRJ-111170\Engineering\12436.SLDPRT C:\PDM PRO ADMIN VAULT\Projects\PRJ-111168\Engineering\Lens.SLDPRT Help Close





MERGE

BRANCHED FILES CAN BE MERGED WITH SOURCE FILE, ANY MODIFICATIONS IN THE BRANCHED FILE WILL BE CARRIED OVER INTO THE SOURCE FILE AS A NEW VERSION

USER ACTIONS

- SELECT BRANCH FILE
- TOOLS -> MERGE



N.N	erge - CI\RDM PRO	ADMIN VAULT\Proje	cts\PRJ-111170	%Engineering\	12436		- 0	×
1	Secting: Branch References:	Latest	ORefe	renced		Transform Operat	tions:	
						Add Prefix.	. Add Suffix	
'	lew file	Include simulation			Regenerate serial number in card	Rename with ser	rial number	
		Indude drawings			✓Name drawings after their models	Replace		
File T	er Display =		in	All Columns •			Show All Levels *	<mark>₽</mark> •
ype	Branch File Name 12436.SLDPRT	Warnings	Merge	Branch 4/4	Source File Found In C:\PDM PRO ADMIN VAULT\Projects\PRJ-111168\En	igineering\	Source File Name	Brand W





HISTORY OF BRANCH FILE WILL SHOW EVENT FROM MERGE OPERATION

bistory on 12436

🕞 View 🕼 Get 🔚 Save 🏠 Compare 🚔 Print							
Event	Version	User	Date	Comment			^
🏷 Merged 'LENS BRANCH EXAMPLE'	4	Admin	09/29/2019 17:43:49	Merged To C:\PDM PR	O ADMIN V	AULT\Projects\PRJ-111168\Engineering\Lens.SLDPRT	
🔁 Checked in	4	Admin	09/29/2019 17:40:00				
🔁 Checked in	3	Admin	09/28/2019 12:21:13				
🔁 Checked in	2	Admin	09/28/2019 10:07:55				
🔽 Transition from 'Initialized' to 'Work In Progress'	1	Admin	09/28/2019 10:07:55	State changed by auto	matic trans	ition.	
T – Initial transition to 'Initialized'	1	∆dmin	00/28/2010 10:07:54	State channed by autor	matic trans	ition	`
Details Name: User: Comment:					Version: [Date: [Update
							Help
						· · · · · · · · · · · · · · · · · · ·	Close





MERGE

HISTORY OF SOURCE FILE WILL SHOW NEW VERSION EVENT FROM MERGE OPERATION

b History on Lens

🕞 View 🕼 Get 🔚 Save 🐚 Compare 🚔 Print \land Event Version User Date Comment Nerged 'LENS BRANCH EXAMPLE' Merged From C:\PDM PRO ADMIN VAULT\Projects\PRJ-111170\Engineering\12436.SLDPRT 7 Admin 09/29/2019 17:43:49 Hand Checked in 7 Admin 09/29/2019 17:43:48 MERGE BRANCH FILE TO SOURCE AFTER DIMENSION CHANGE & Branched 'Lens Branch 2' Branched To C:\PDM PRO ADMIN VAULT\Projects\PRJ-111170\Engineering\12437.SLDPRT 09/29/2019 17:38:03 6 Admin * Branched 'LENS BRANCH EXAMPLE' Branched To C:\PDM PRO ADMIN VAULT\Projects\PRJ-111170\Engineering\12436.SLDPRT 6 Admin 09/28/2019 10:07:53 Revision: B 09/26/2019 13:12:39 6 Admin \sim Transition from 'Work In Progress' to 'Production Released' 6 Admin 00/26/2010 12:12:20 > - Details Name: Version: User: Date: Update Comment: Help Close





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EXCLUDE BRANCHING

B Group Properties<More than one group is selected>

? X

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GROUP PROPERTY – BRANCH

EXCLUDES FILES IN SELECTED FOLDER(S) FROM ANY BRANCH\MERGE OPERATIONS



ENGINEER3D! TRAINING+TECHNOLOGY

- LABELS ADD A NOTE TO A VERSION OF A FILE
- ADD INFORMATION TO A FILE'S HISTORY
- PERFORM SAME FUNCTION AS VERSION COMMENT
- ADDED WITHOUT CREATING A NEW VERSION
- LABELS CAN BE USED IN SEARCHES

USER ACTIONS

- SELECT FILE
- MODIFY -> LABEL





GROUP\USER PERMISSION

- CAN SET LABELS
- CAN DELETE LABELS





2

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USER ACTIONS

- SELECT FILE
- MODIFY -> LABEL
- ENTER LABEL NAME AND COMMENT
- SELECT OK
- VIEW VERSION HISTORY
 - NAME\COMMENT CAN BE MODIFIED

Name	MERGE FROM PART 12356	ОК
		Cancel
		Help
Commont		
comment:		
MERGE CO	MPLETE FROM PART 12356	
MERGE CC	DMPLETE FROM PART 12356	
MERGE CC	DMPLETE FROM PART 12356	
MERGE CC	MPLETE FROM PART 12356	

? ×

22

🕞 View 🛯 🛱 Get 🔚 Save ष Compare 🚔 Print 🗙 Delete Label					
Event	Version U	Jser	Date	Comment	^
Eabeled 'MERGE FROM PART 12356'	7 A	\dmin	09/29/2019 19:28:39	MERGE COMPLETE FROM PART 12356	
🏷 Merged 'LENS BRANCH EXAMPLE'	7 A	\dmin	09/29/2019 17:43:49	Merged From C:\PDM PRO ADMIN VAULT\Projects\PRJ-111170\Engineering\12436.SLDPRT	
🔁 Checked in	7 A	\dmin	09/29/2019 17:43:48	MERGE BRANCH FILE TO SOURCE AFTER DIMENSION CHANGE	
🖧 Branched 'Lens Branch 2'	6 A	\dmin	09/29/2019 17:38:03	Branched To C:\PDM PRO ADMIN VAULT\Projects\PRJ-111170\Engineering\12437.SLDPRT	
🖧 Branched 'LENS BRANCH EXAMPLE'	6 A	\dmin	09/28/2019 10:07:53	Branched To C:\PDM PRO ADMIN VAULT\Projects\PRJ-111170\Engineering\12436.SLDPRT	
Revision R	6 ۵	1 1 1 1 1	00/26/2010 13:12:30		、 ×
					>
Label details					
Name: MERGE FROM PART 12356				Version: 7	

Name:	MERGE FROM PART 12356	Version:	7	
User:	Admin	Date:	09/29/2019 19:28:39	
Comment:	MERGE COMPLETE FROM PART 12356		^	Upda
				Hel
			~	Clos



B History on Lens

- SEARCH LABEL
- COMPLETE SEARCH CARD

🔍 📲 🔍 🖻 🔚 🚖 🗝 🗨 Actions ▼ Modify ▼ Display ▼ Tools ▼ Name and Location Cards Variables Checked in/out Version Data Workflow Label History Content MERGE Text to find in label: \sim Also look in the label comment Find only labels made by: \sim Find only labels set before: 09/29/2019 09/29/2019 Find only labels set after: File Type Configurati... Checke... Name Found In State Found in... Checked Out In Modified Category Size Lens SOLIDWORKS ... 🔋 C:\PDM PRO ADMIN VAULT\Projects\PRJ-111168\Engineeri... 🔗 Pro... 7 09/29/2019... CAD Files 56.52 ...





• CARD EDITOR SET UP

E Complete Search		
Name and Location Cards Variables	Checked in/out Version Data Workflow Label Histor	ry Content
Text to find in label:	Label - Search Text 🗸 🗸	
Also look in the label comment	-	
Find only labels made by:	Label - by User 🗸 🗸	
Find only labels set before:	9/29/2019	
Find only labels set after:	9/29/2019	

Q Label - Look in Comment Too

Q Label - Search Text





- ALLOWS USER(S)TO EXECUTE A PREDEFINED SQL QUERY WITHOUT THE NEED TO LOG INTO THE SQL SERVER
- AVAILABLE IN SOLIDWORKS PDM PROFESSIONAL

B PDM PRO ADMIN VAULT - Report Generator

File Edit View Help

				Selected files	ueries
Modified	Туре	Size	In folder	Name	List of enabled (not deleted) users Show All Files Not Replicated To Target Server Show current file details for all files under selected fol Show Variable Mappings In Vault Shows All Folders In The Vault Total disk space usage of physical files stored in the v





USER ACCESS

• TOOLS -> REPORT GENERATOR



PDM PRO ADMIN VAULT - Report Generator

File Edit View Help



Shows All Folders In The Vault

Fol	der_Name
1	
En	gineering Change Notice
Pro	ojects\
Pro	pjects/PRJ-111168/
Pro	jects\PRJ-111168\Concepts\
\Pro	pjects\PRJ-111168\Engineering
Pro	jects\PRJ-111168\Marketing\
Pro	pjects\PRJ-111169\
Pro	jects\PRJ-111169\Concepts\
Pro	pjects/PRJ-111169/Engineering
Pro	jects\PRJ-111169\Marketing\
Pro	jects\PRJ-111170\





- REPORTS CREATED
 FROM SQL QUERY
 - QUERY TO BE SAVED AS .CRP FILE
- REPORTS DOWNLOAD FROM SOLIDWORKS.COM

SELECT Username	, F	ull	Name,	Init	tials,	Email
FROM Users						
Where username	is	not	null	and	enable	ed=1
Order by Userna	me					

.00 % -

I Results Ressages

	Usemame	FullName	Initials	Email	
1	Admin	Admin	Admin	NULL	
2	Engineer1	Engineer1	Eng1		
3	Engineer10	Engineer10	Eng10		
4	Engineer11	Engineer11	Eng11		
5	Engineer12	Engineer12	Eng12		
6	Engineer13	Engineer13	Eng13		
7	Engineer2	Engineer2	Eng2		
8	Engineer3	Engineer3	Eng3		
9	Engineer4	Engineer4	Eng4		
10	Engineer5	Engineer5	Eng5		
11	Engineer6	Engineer6	Eng6		
12	Engineer7	Engineer7	Eng7		





REPORT GENERATOR – IMPORT QUERY

IMPORT QUERY

- FILE -> IMPORT QUERY
- SELECT CRP FILE(S) -> OPEN
- SET GROUP\USER ACCESS





REPORT GENERATOR CRP FILES AVAILABLE FOR DOWNLOAD FROM SOLIDWORKS.COM • CUSTOMER PORTAL – KNOWLEDGE BASE





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INPUT FORMULA

ABILITY TO POPULATE AN EDIT BOX CONTROL WITH A STRING BUILT UP BY VALUES FROM VARIABLES LINKED TO OTHER CONTROLS ON THE FILE DATA CARD

X

COMBINE ELEMENTS INTO A STRING

Prefix:	Number:	Customer:		
Prefix	Number	Customer Name	~	
roject Name:		10		
Toject Numbe	zi		1	
Input	formula			
mpar				

Prefix:	Number:	Customer:	
ENG	12438	GB	~
Project Name:			
Project Name: PROJ-ENG-12	438-GB		





INPUT FORMULA – CHECKBOX VALUE

CHECKBOX VALUE

CHECKED VALUE 1 = PENDING

APPROVAL REQUIR	RED	
APPROVED BY:	Approved By	
APPROVED DATE:	Approved Date	

Input formula		
%APPROVALREQUIRED(1=PENDING, 0=N/A)%	>	5

UNCHECKED VALUE 0 = N/A

APPROVAL REQUI	RED
APPROVED BY:	PENDING
APPROVED DATE:	PENDING

APPROVAL REQUI	RED	
APPROVED BY:	N/A	
APPROVED DATE:	N/A	





INPUT FORMULA – TOKEN

SELECTION OF VALUE FROM DROPDOWN POPULATES TEXT FIELDS

USER SELECTS CUSTOMER DEPARTMENT, ADDRESS, PHONE NUMBER FIELDS AUTO POPULATE

CUSTOMER:	GSC	
DEPARTMENT:	TECH SUPPORT	
ADDRESS:	W189N11161 Kleinmann Dr	
	Germantown, WI 53022	
PHONE NUMBER:	800-454-2233	





INPUT FORMULA – TOKEN

CUSTOMER LIST			1		
	List name: CUSTO	OMER LIST			
	Data type: Text W	ith Alias 🛛 🗸 🗸			
Data:					
Displayed Value	Alias				
GSC	TECH SUPPORT W189N11161 Kleinmann Dr Germantown, WI 53022 8	00-454-2233			
DASSAULT SYSTEMES	HEADQUARTERS 175 Wyman Street Waltham, MA 02451 800-693-900	0			
<click edit="" to=""></click>	<click edit="" to=""></click>				
		Help	Einput Folder Card		
			CUSTONED		
			COSTOMER:	Customer Name	×

Alias

TECH SUPPORT|W189N11161 Kleinmann Dr |Germantown, WI 53022 |800-454-2233

CUSTOMER:	Customer Name ~
DEPARTMENT:	DEPARTMENT
ADDRESS:	ADDRESS
	CITY
PHONE NUMBER:	PHONE NUMBER





INPUT FORMULA – TOKEN

CUSTOMER:	Customer Name 🔗
DEPARTMENT:	DEPARTMENT
ADDRESS:	ADDRESS
	CITY
PHONE NUMBER:	PHONE NUMBER

	Input formula	
DEPARTMENT	\$TOKEN(Customer Name_1,))	>
	Input formula	
ADDRESS	STOKEN(Customer Name 2,)	>
	Input formula	
CITY	\$TOKEN(Customer Name 3.0	3
	Input formula	
PHONE NUMBER	STOKEN Customer Name	>





INPUT FORMULA

LIMITATIONS

- INPUT FORMULAS ARE DRIVEN BY MANUAL ENTRY
- NO DIRECT WAY TO CREATE CONDITIONAL "IF" TYPE FORMULAS

ALTERNATE OPTION

- API PROGRAMMING
- DISPATCH







GROUP SETTINGS – CHECK IN

OPTIONS TO INCLUDE DRAWING REFERENCES UPON MODEL CHECK-IN



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GROUP SETTINGS – EXPLORER

FILE TYPES TO SHOW

LOCAL FILE CLEAN-UP





GROUP SETTINGS – MENUS

CUSTOMIZE GROUP FILE\FOLDER SHORTCUT MENUS, ACTION, MODIFY, DISPLAY AND TOOLS DROPDOWNS

Manager - Properties				r x		
Settings					2	>
Adding Files Adding Folders Branch Check In Copy Tree Explorer	Use the controls below to customize use the + and - buttons to add or re use drag and drop from the comman Available commands: Fist list. Categorized	the menus in move comma nd list to the r	i Windown ands from meniu	Explorer. You can elt the selected menu or Destination Menu: Background Shortcut	Reset Copy	~
Seneral Properties File Compare Group Members Members Administrative Permissions Merge Folder Permissions Merge State Permissions Reference Dialog Transition Permissions Toolbar Search Cards Warnings Bils of Materials Viewers Copy Tree Branch	 <add-ins> <non-pdm command<="" li=""> <os commands=""></os> Add To File Vault Check in Check in Check out Check out Copy Link Edit Edit Line To Add To File Vault </non-pdm> </add-ins> 	•	* * 0 * 1	Beckground Shortcat File Shortcat Menu Folder Shortcat Menu Bar VActions Bar VActions Bar VTools Paste Paste Paste shared Add-ins> New Properties Search Local Fil	les	*
Court Mail						
Settings				OK	Cancel H	Help





GROUP SETTINGS – REFERENCE DIALOG

LATEST VERSION VIEWING OPTIONS

SELECTION CHILD REFERENCES FOR TRANSITIONING AND FILE CHECK-OUT



Manager - Properties		7 ×		
	Settings		20	×
	Adding Files	These options control the behaviour of the reference dialog box.		
	Branch Check In	Check out and version access controls:		
Manager	Copy Tree Explorer	Auto select reference files to get latest when checking out.		
General Properties Group Members	File Compare Language	Always work with latest version of files.		
Administrative Permissions	Merge	Enable the get version command in SOLIDWORKS Add-in.		
State Permissions	Reference Dialog Toolbar	Check out files silently without showing the check out dialog box.		
Search Cards Bills of Materials	Viewers	Try to check out all referenced files when the referencing file is checked out.		
Templates Warnings		Miscellaneous:		
Cache Options Copy Tree		Select child references during state change.		
Branch		Select references that are defined as drawing nodes during state change.		
		Show "not rebuilt" warnings on drawings and assemblies in need of rebuilding.		
Send Mail	🔓 History,			
Settings		OK Consel	н.	alo
		UN Canca	пе	η μ



WHATS NEW PDM 2019

- CONDITIONAL NOTIFICATIONS
 - ADD PREDEFINED CONDITIONS TO SEND TRANSITION NOTIFICATIONS TO USERS AND GROUPS
 - SEND NOTIFICATIONS DYNAMICALLY TO USERS BASED ON THE VALUE OF DATA CARD VARIABLES

View Values 📝 I	dit Values	Acconditional Notification
	27407 E	Folder: C:\PDM PRO ADMIN VAULT*.*
APPROVAL REQUI	RED	Tunor P_ Change Workflow State
APPROVED BY:	PENDING	Type: •• Change worknow state
APPROVED DATE:	PENDING	
	<u>.</u>	🚑 Notification Properties 🛛 Recipients 🎦 Notification Conditions
		This notification is sent when the following conditions are met :

Variable	Comparison	Value	Configuration
(x) APPROVALREQUIRED	Text Equal To	1	

RECIPIENT – MANAGER GROUP



OK	Cancel	Holn
NA.	Guinder	ricih

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WHAT'S NEW PDM 2019

- EDIT HISTORY COMMENTS ADMINISTRATIVE PERMISSIONS
- MIXED AUTHENTICATION SUPPORT WINDOWS\ SW PDM USER
- NAMING FILES WITH SERIAL NUMBERS
 - NAME INTERNAL OR VIRTUAL COMPONENT, OR WELDMENT PART
- OPENING A PARENT FILE WITHOUT REFERENCED FILES
- MANDATORY USER COMMENTS
 - SPECIFIED FOR STATES AND TRANSITIONS





PDM RESOURCES

- <u>WWW.SOLIDWORKS.COM</u> CUSTOMER PORTAL
 - KNOWLEDGE BASE
- WWW.HELP.SOLDIWORKS.COM
- <u>WWW.MYSOLIDWORKS.COM</u>
- INSTALLATION FILES
 - C:\Program Files\SOLIDWORKS Corp\SOLIDWORKS PDM\Lang\GB
- ADMINISTRATION TOOL HELP
 - ADMINSTRATION GUIDE
 - REPLICATION GUIDE
 - WEB SERVER GUIDE









YOUR FEEDBACK IS NEEDED!

	and in February	-				·
-						-
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ession Evaluation Form	tor such up fasch. The	ention, plan ok you for	waa rata he yatar partis	er yssu mern syntiam.	n with sa	andt
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PRESENTERS

MAX KENT & JEN TAYLOR

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Thank you!







THANK YOU!

MAX & JEN