SOLIDWORKS PDM STANDARD: ADMIN TRAINING

Pre-Requisites: SOLIDWORKS PDM CAD Editor course, basic experience with the SOLIDWORKS PDM software, experience with the Windows™ operating system, and knowledge of SOLIDWORKS PDM file structure and referencing.

Daily Schedule: 8:30 a.m. - 4:30 p.m.

Length: 2 Days

The focus of this course is on the fundamental skills and concepts central to the successful use of SOLIDWORKS PDM. The intended audience for this course is anyone who will setup and/or administer SOLIDWORKS PDM.administer SOLIDWORKS PDM Professional.

Introduction

» About This Course

Lesson 1: Installation Planning

» Planning for SOLIDWORKS PDM Standard
» The Planning Process
» Training Scenario
» The Installation Process

Lesson 2: The Administration Tool

» SOLIDWORKS PDM Standard Administration Tool
» Case Study: Create a New File Vault
» Create a Local File Vault View
» Setup Overview
» Exercise 1: Create File Vault and Vault View

Lesson 3: Users and Groups

» Users
» Case Study: Creating Users
» Groups
» Case Study: Create a New Group
» Exercise 2: Users & Groups

Lesson 4: Folder Card Creation

» Data Cards
» Anatomy of a Data Card
» Case Study: Design a Folder Data Card
» Exercise 3: Variables, Serial Numbers, Lists and Data Cards
»
»

Lesson 5: File and Search Cards

» Importing Data Cards
» Case Study: Design a File Data Card
» Case Study: Design a Search Data Card
» Exercise 4: File Cards

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

» Columns
» Case Study: Column
» Bill Of Material
» Case Study: BOM
» Exercise 5: Create Column and BOM Views

Lesson 7: Workflow

» Workflows
» Case Study: Create New Workflows
» Revisions
» Case Study: Create New Revision Schemes
» Case Study: CAD Files Revision Scheme
» Exercise 6: Revisions and Workflows

Lesson 8: Notifications

» Notifications
» Case Study: Assign Notifications
» Exercise 7: Notifications

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Lesson 9: Data Migration
- » Migrating Legacy Data
- » Case Study: Data Migration
- » Migrating Revisions

Lesson 10: Vault Backup
- » Backing Up File Vaults

Appendix A: File Types and Settings
- » File Types
- » User Settings

Appendix B: Toolbox Setup
- » Toolbox Setup

Appendix C: Routing Setup
- » Routing Setup

Appendix D: CircuitWorks Setup
- » Circuit Works Setup

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