

Administering SOLIDWORKS PDM Course Outline

 DURATION/TIME 2 Days 9:00 am - 5:00 pm	 METHODOLOGY Practical hands-on with using computers, lecturing, discussions and case studies.
 PREREQUISITES Experience with the Windows™ Operating System. Basic experience with the SOLIDWORKS PDM software. Knowledge of SOLIDWORKS PDM file structure and referencing.	 TARGET Application Engineer, R&D Engineer, Product Designer or Engineer, and Industrial Engineer

INTRODUCTION

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.

OBJECTIVE

At the end of this program participants are expected to:

- Understand the installation and planning process.
- Use PDM Administration Tool to create and manage vaults.
- Manage user and groups settings.
- Understand Data Cards options and how to design, import, and manage them.

CONTACT

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Administering SOLIDWORKS PDM Professional

DAY 1

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: User 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
- Quick Search in Windows Explorer
- Case Study: Setting up Quick Search

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

- Columns
- Case Study: Columns
- Bill Of Material
- Case Study: BOM

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DAY 2

Course Outline:

Lesson 7: Workflow

- Workflows
- Categories
- Case Study: Create Categories
- Case Study: Create New Workflows
- Revisions
- Case Study: Create New Revision Schemes
- Drawing Revision Table
- Case Study: CAD Files Revision Scheme

Lesson 8: Notifications and Tasks

- Notifications
- Case Study: Assign Notifications
- Case Study: Convert Tasks

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

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