

Administering SOLIDWORKS PDM Professional Course

LENGTH: 3 DAYS

Prerequisites: Basic experience with the SOLIDWORKS 3D CAD software, experience with the Windows operating system, and knowledge of SOLIDWORKS file structure and referencing.

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



Topics covered in this course are:

Introduction

Using SOLIDWORKS PDM Professional

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
- 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: Folder 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: Columns
- Bill of Material
- Case Study: BOM
- Exercise 5: Create Column and BOM Views

Lesson 7: Workflow

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

Lesson 8: Notifications and Tasks

- Notifications
- Case Study: Assign Notifications
- Case Study: Convert Task
- Exercise 7: Notifications and Tasks

Lesson 9: Folder Templates

- Templates
- Case Study: Folder Template
- Exercise 8: Folder Templates

Lesson 10: File Templates

- File Templates
- Case Study: File Template

Lesson 11: Data Migration

- Migrating Legacy Data
- Case Study: Data Migration

Lesson 12: Vault Backup

- Backing Up File Vaults



Alignex, Inc.

Toll Free: (866) 378-6829
Email: info@alignex.com

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