

Administering SOLIDWORKS PDM Standard Course

LENGTH: 2 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 Standard. The intended audience for this course is anyone who will setup, administer, and/or maintain SOLIDWORKS PDM Standard.



Topics covered in this course are:

Introduction

Using SOLIDWORKS PDM Standard

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: 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

- Workflow
- Case Study: Create Your Workflow
- Revisions
- Case Study: Create Your Revision Scheme
- Case Study: CAD Files Revision Scheme
- Exercise 6: Categories and Revisions and Workflow

Lesson 8: Notifications

- Notifications
- Case Study: Assign Notifications
- Exercise 7: Notifications

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

Appendix C: Routing Setup

Appendix D: CircuitWorks Setup



Training Registration

View our upcoming training schedule and training locations.

[Training Calendar](#)



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Training Registration

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