Training
SolidWorks – Administering PDM Professional

Description

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

Prerequisites

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.

Duration

2 Days

Course Outline

Introduction	**About This Course**
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 • Create a New File Vault • Create a Local File Vault View • Setup Overview
Lesson 3	**Users and Groups** • Users and Creating Users • Groups and Creating New Groups
Lesson 4	**Folder Card Creation** • Data Cards • Anatomy of a Data Card • Design a Folder Data Card
Lesson 5	**File and Search Cards** • Importing Data Cards • Design a File Data Card • Design a Search Data Card • Quick Search in Windows Explorer • Setting up Quick Search
Lesson 6	**Column and Bill of Materials (BOM) Views** • Columns • Bill of Materials • Create Column and BOM Views
Lesson 7	**Workflow** • Workflows • Categories • Create New Workflows • Revisions

	• Create New Revision Schemes • Drawing Revision Tables • CAD Files Revision Schemes
Lesson 8	**Notifications and Tasks** • Notifications • Assigning Notifications • Converting Tasks
Lesson 9	**Folder Templates** • Templates • Folder Templates
Lesson 10	**File Templates** • File Templates • Templates with Other File Types
Lesson 11	**Data Migration** • Migrating Legacy Data • Migrating Revisions
Lesson 12	**Vault Backup** • Backing up File Vaults