

# Training: Administering SOLIDWORKS PDM Professional (2 days)

**Prerequisites:** Prerequisites for this SOLIDWORKS Training course include the completion of the SOLIDWORKS PDM Interface Training course.

**Description:** 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.

## Lesson 1— Installation Planning

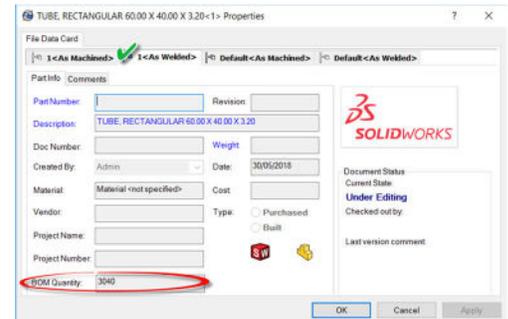
- Planning for SOLIDWORKS PDM Professional
- The Planning Process
- Data Management Plan
- Implementation Plan
- Training Scenario
- The Installation Process
- SQL Server
- Databases
- SOLIDWORKS PDM Professional Client

## Lesson 2— The Administration Tool

- SOLIDWORKS PDM Professional Administration Tool
- Local Settings
- Group Policies
- Settings
- Creating a SOLIDWORKS PDM Professional File Vault
- Case Study: Create a New File Vault
- Create a Local File Vault View
- Create a Local View
- Why the Root Folder?
- Sharing the Vault View
- Setup Overview
- View Setup Utility
- Access Control
- Metadata
- Workflow
- Vault Maintenance

## Lesson 3— Users and Groups

- Users
- Creating New Users
- User Information
- Copy Permissions
- Mixed Mode Login
- User Properties
- Groups
- Administrative Permissions
- Folder Permissions
- Assigned Folder Permissions
- State Permissions
- Transition Permissions
- Permissions per File
- Search Cards
- Bill of Materials
- Tasks
- Templates
- Warnings
- Cache Options
- Copy Tree
- Change User Password
- Delete a User
- Managing Multiple Users
- Missing User Login Information
- Groups
- Assign Group Permissions
- Manage Multiple Groups



## Lesson 4— Folder Card Creation

- Data Cards
- Card Editor
- Anatomy of a Data Card
- Controls
- Card Editor
- Card Associations
- Installed Cards
- Options
- Designing a Data Card
- Static Text Control
- Select Control
- Image Control
- Frame Control
- Data Card Variables
- Variable Editor Functions
- Variable Listing
- Variable Definition
- Variable Mappings
- Best Practices
- Create New Variables
- Edit box Control
- Serial Numbers

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Testing			Folder				
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# Training: Administering SOLIDWORKS PDM Professional (2 days)

- Primary Controls: Command Button Control, Combobox Dropdown Control, Combobox Droplist Control, Tab Control
- Lists: Card Lists, Dynamic Lists, Advanced Lists
- Additional Controls: Checkbox Control, Date Field Control, Alignment Controls
- Card Grid Settings and Select Font
- Exporting Data Cards

## Lesson 5— File and Search Cards

- Importing Data Cards
- Radio-Button Control
- Card Control Logic
- Design a Search Data Card
- Controlled Tabs
- Glue Controls
- Card Search Control
- Variable Search Control
- Search Card Default Values

## Lesson 6— Column and Bill of Materials (BOM) Views

- Columns
- File List Column
- Search Column
- Bill Of Material

## Lesson 7— Workflow

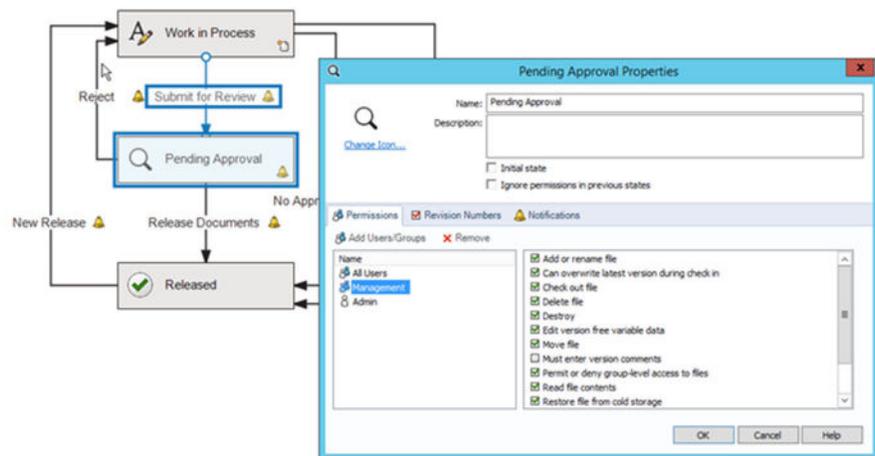
- Workflows
- Create Categories
- Category Conditions
- No Category Match
- Rename and Delete a Category
- Creating Workflows
- Open and Save a Workflow
- Rearranging the Workflow
- Workflow State
- Workflow Transitions
- Revisions
- Revision Component
- Transition Conditions
- Transition Actions
- Drawing Revision Tables
- Automatic Transitions
- Parallel Transitions

## Lesson 8— Notifications and Tasks

- Notifications
- Workflow Notifications
- Tasks
- Add Tasks to Vault
- Task Host Configuration
- Executing Tasks

## Lesson 9— Folder Templates

- Templates
- Template Administration
- Template Wizard
- Template Variables
- Template cards



## Lesson 11— Data Migration

- Migrating Legacy Data
- Data Migration Planning
- Clean Data
- What to Migrate
- Migrating Revisions
- Set Revision

## Lesson 12—Vault Backup

- Backing Up File Vaults
- Database Backup
- Archive Server Settings Backup
- Archive Files Backup

## Lesson 10— File Templates

- File Templates
- Template Source Files
- Templates with Other File Types
- Template Card
- Update List Information
- ECO Template

## Appendix A:

- File Types and User Settings

## Appendix B:

- Data Import/Export

## Appendix C:

- Toolbox Setup

## Appendix D:

- Routing Setup

## Appendix E:

- CircuitWorks Setup