



SOLIDWORKS
SOLIDWORKS PDM
Training

Course Outline

SOLID  **PERTS**
by solidxperience

ENSURE YOUR SUCCESS IN 3D DESIGN WITH SOLIDWORKS

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Course Objectives : At the end of each course, students will know the capabilities of the software and will be able to use the learned features.
Training Course : Training is given in class at SolidXperts or online where each student has access to a workstation or online product version.
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Administration of SOLIDWORKS PDM Professional – 3 days (21h)

1. Installation Planning

- Planning Process
- Data Management Plan
- Implementation Plan
- Fundamentals of PDM

2. The Administration Tool

- Administration Tool
- Creating a Files Vault
- Creating a Local Files Vault View

3. Users and Groups

- Creating Users
- Creating Groups

4. Folder Card Creation

- Data Cards Types
- Cards Editor
- Design a Folder Data Card
- Serial Numbers
- Card Lists

5. File and Search Cards

- Importing Data Cards
- Design a File Data Card
- Design a Search Data Card

6. Columns and Bill of Materials (BOM) Views

- File List Columns
- Search Columns
- Bills of Material Columns

7. Workflow

- Categories
- Creating some Workflow Revisions
- Revisions Tables and Drawings
- Transitions PDM Professional

8. Notifications and Tasks

- Notifications
- Conditional Notifications
- Message System
- Various Conversion Tasks

9. Folder Templates

- Creating Folder Templates

10. File Templates

- Creating File Templates

11. Data Migration

- Migrating Legacy Data
- Data Migration
- Migrating Revisions

12. Vault Backup

- Backing Up Files Vaults

Appendix

- File Types and Settings
- Data Import/Export
- Toolbox Setup

Not included :

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Administration of SOLIDWORKS PDM Standard – 2 days (14h)

1. Installation Planning

- Planning Process
- Data Management Plan
- Implementation Plan
- Fundamentals of PDM

2. The Administration Tool

- Administration Tool
- Creating a Files Vault
- Creating a Local Files Vault View

3. Users and Groups

- Creating Users
- Creating Groups

4. Folder Card Creation

- Data Cards Types
- Cards Editor
- Design a Folder Data Card

5. File and Search Cards

- Importing Data Cards
- Design a File Data Card
- Design a Search Data Card

6. Columns and Bill of Materials (BOM) Views

- File List Columns
- Search Columns
- Bill of Materials Columns

7. Workflow

- Creating One Workflow
- Conditions
- Revisions
- Revisions Tables and Drawings

8. Notifications and Tasks

- Notifications
- Task (conversion as PDF only)

9. Data Migration

- Migrating Legacy Data
- Data Migration
- Migrating Revisions

10. Vault Backup

- Migrating Legacy Data
- Data Migration
- Migrating Revisions

Appendix

- File Types and Settings
- Toolbox Setup

Not included :

- Installation Process
- Routing Setup
- CircuitWorks Setup

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Using of SOLIDWORKS PDM – 1 day (7h)

1. SOLIDWORKS PDM Concepts

- Fundamentals of PDM
- What is SOLIDWORKS PDM
- SOLIDWORKS PDM Overview
- SOLIDWORKS PDM Modules
- SOLIDWORKS PDM Components

2. SOLIDWORKS PDM User Interface

- SOLIDWORKS PDM User Interface

3. Document Creation and Check In

- Creating New Folders and Files
- Adding Existing Files
- Documents Check In
- Advanced Documents Check In

4. Versioning Files

- Versioning Files

5. File References

- File References
- Copying Files and References
- Move Files and References (PDM Professional Only)
- Sharing Files (PDM Professional Only)

6. Searching

- Searching in SOLIDWORKS PDM
- Favorite Searches (PDM Professional Only)

7. Workflow and Notification

- SOLIDWORKS PDM Workflow
- Change State
- See Notifications

8. Working in SOLIDWORKS*

- SOLIDWORKS Add-In
- Add-In Options
- Managing local cache

* Lesson for SOLIDWORKS users only

Appendix

- Use Bills of Material (BOM)

NOTE SPÉCIFIQUE À CETTE FORMATION

Audience cible : Les utilisateurs qui ne travaillent pas avec SOLIDWORKS n'ont pas besoin de suivre la dernière leçon de la formation.

Activités de formation : Cette formation est généralement donnée à un plus grand nombre de participants. Par soucis d'accommoder les clients, cette formation est donnée au bureau du client ou en ligne plutôt qu'en laboratoire informatique chez SolidXperts.

Méthodologie : La formation est basée sur des études de cas démontrées par le formateur. Étant donné la facilité d'utilisation de PDM, il n'y a pas d'exercice pratique à la fin de chaque leçon.

Évaluation des compétences : Il n'a pas d'évaluation des compétences formelle à la fin de la formation étant donné la facilité d'utilisation de PDM.

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Update SOLIDWORKS PDM Standard to Professional – 1 day (7h)

* Numbers are not in sequential order since they're referring to the chapters of the following trainings : "Administration of SOLIDWORKS PDM Standard" & "Using of SOLIDWORKS PDM"

ADMINISTRATION of PDM

2. Administration Tool

- Administration tool
- Color of the vaults
- Additional fields

3. Users and Groups

- Windows connection
- User settings: Personalization

4. Folder Card Creation

- Serial numbers
- Centralized card lists
- Lists from an SQL database
- Lists controlled by a variable
- Data card entry formulas

7. Workflow

- Categories
- Creation of several workflows
- Unlimited number of states
- Types of transition
- Unlimited revision schemes

8. Notifications and Tasks

- Message system
- Conditional notifications
- Various conversion tasks
- Additional task options

9. Folder Templates

- Creating Folder Templates

10. File Templates

- Creating file templates

12. Vault Backup

- Maintenance plan in SQL Server Management Studio

Appendix

- Import/Export de données
- Survol : Réplication
- Survol : Web2
- Survol : Générateur de rapport
- Survol : Outils PDMxperts, programmations personnalisées, dispatch

USING of PDM

2. SOLIDWORKS PDM User Interface

- Multi-document preview
- Files in private state

5. File References

- Move files and references
- Share files

6. Searching

- Dedicated search tool
- Favorite searches
- Search in the content (indexing)
- Search in the "labels»

8. Working in SOLIDWORKS

- Add-in
- Marking with eDrawings Professional

Appendix

- Use of named nomenclatures

Not included :

- Installation process
- Routing Setup and CircuitWorks Setup

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SOLIDWORKS PDM Professional API Fundamentals – 2 Days (14h)

1. Connecting to a Vault

- COM Programming
- Application Types
- Namespaces
- The IEdm Vault Interface
- Debugger feedback
- Logging into a Vault
- Handling HRESULT Return Values
- SOLIDWORKS PDM Professional API Help
- Interface Versioning

2. Files, Folders, Items and References

- The IEdm Object Interface
- The IEdm File Interface
- The IEdm Folder Interface
- The IEdm Pos Interface File References
- The IEdm Batch-Listening Interface
- The IEdm Clear-Local Cache Interface

3. Users and Groups

- The IEdm User Interface
- The IEdm User Group Interface
- The IEdm UserMgr Interface

4. Card Variables, Versions and Revisions

- Card Variables
- File Versions
- File Revisions
- The IEdm Dictionary Interface

5. Add-In Applications

- SOLIDWORKS Enterprise PDM Add-Ins
- The IEdm AddIn Interface
- The Implements Statement
- Simple Implementation
- COM Registration
- Get AddIn Info
- Minimum Version Required
- Additional Add-In Information
- Installing an Add_in
- Debugging a DLL
- The IEDm Vault Argument
- The IEDm CmdMGR Argument
- The IEDm AddIn 5. OnCmd
- EdmCmdData Members for EdmCmd
- EdmCmdData Members for EdmCmd_Serial No

6. Task Add-In Applications

- SOLIDWORKS Enterprise PDM Task Add-Ins
- Task Interfaces
- Task Hooks
- The IEdm Search Interface
- The IEdm Workflow Mgr Interface
- The IEdm Workflow Interface

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SOLIDWORKS Manage – 2 days (14h)

**The "Administration of SOLIDWORKS PDM Professional" training is recommended for this class.*

1. System Options

- Planning for SOLIDWORKS Manage
- System Architecture
- Configuration File
- Essential Administrative Options
- Numbering Schemes

2. Connecting to SOLIDWORKS PDM Professional

- Record Object Types
- Requirements for Connecting
- Creating a PDM Object

3. Document and Record Object Types

- Record Object
- Permissions
- Document Object
- File Templates

4. Fields and Field Groups

- Fields
- Organizing Fields
- Field Groups
- Numbering by Field Group
- Global Variables

5. Users and Groups

- Importing Users
- Groups

6. Bills of Materials

- Bills of Material
- Creating Bills of Material

7. Backup, Restore, and Upgrade

- Backing Up
- Restoring the Environment
- Upgrading SOLIDWORKS Manage

8. The Web Interface

- The Web Interface
- Web Interface and PDM Objects

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