



 **SOLIDWORKS**
SOLIDWORKS PDM
Training

Course Outline

SOLID  **PERTS**
by solidxperience

ENSURE YOUR SUCCESS IN 3D DESIGN WITH SOLIDWORKS

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Administration of SOLIDWORKS PDM Professional – 3 days (21h)

1. Installation Planning

- Planning for SOLIDWORKS PDM Professional
- Planning Process
- Training Scenario
- Installation Process

2. The Administration Tool

- PDM Professional 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

- Workflows
- Categories
- Revisions
- Revisions Tables and Drawings

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 :

- Installation Process
- Routing Configuration
- CircuitWorks Configuration

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.

Methodology : Training is based on case studies demonstrated by the instructor. At the end of each lesson, time will be given for exercises.

Competences Evaluation : During the classwork, the instructor will correct the exercises on-demand and explain the solutions to the entire class if needed.

Instructor : SolidXperts trainers are Certified SolidWorks Instructors (CSWI) and authorized by Emploi-Québec.

Course Materials : One or more training manuals are included with the training course.

Attestation : A certificate will be given to each student at the end of the course to attest to the successful completion of the requirements for the course.

PMT2334-ENG

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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PMT2332-ENG

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 of Named Bills of Material (BOM) (PDM Professional only)

SPECIFIC NOTE TO THIS TRAINING

Target Audience : Users not working with SOLIDWORKS don't need to take the last lesson of the training;

Training Location : This training is generally given to a larger number of participants. In order to accommodate customers, this training is given at the customer's office or online rather than in a computer lab at SolidXperts.

Methodology : The training is based on case studies demonstrated by the trainer. Due to the ease of use of PDM, there is no practical exercise at the end of each lesson.

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.

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Attestation : A certificate will be given to each student at the end of the course to attest to the successful completion of the requirements for the course.

SOLIDWORKS Version : We always train on the latest product version.

PMT2331-ENG

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 Professional" & "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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