



**solidxperts**

**PDMXPPTS TOOLS**

**FOR SOLIDWORKS PDM**



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## Introduction

PDMxperts Tools is a suite of tools for SOLIDWORKS PDM Professional. Some of these tools can be launched by users, while others integrate seamlessly with PDM. Some of these tools allow you to perform tasks that regular PDM features don't offer, while others save time by performing batch processing.

There is also a suite of tools for SOLIDWORKS called ToolsXperts, which consists of more than 15 tools that have been developed and improved every year for over 20 years. Learn more about this other suite of productivity tools.

## Revision documents creation

This tool allows users to easily create a revision request document (ECO, ECN, etc.) as a Word or Excel file and link the affected documents (SOLIDWORKS, DWG, PDF, etc.) to it.

## CutXperts automated task

CutXperts is one of the most popular tools in the ToolsXperts tool suite for SOLIDWORKS. This tool allows you to export sheet metal parts, plates, or furniture panels to DXF/DWG at a 1:1 scale.

SOLIDWORKS PDM offers file export tasks that are usually triggered by workflows. A task is available with the PDMxperts tools to run processing with CutXperts in the same way as PDM tasks, i.e., through workflows. For example, approving a part will trigger its automatic export to DXF format, ready for cutting.

## Quantity Report

The ToolsXperts tool suite for SOLIDWORKS offers the Quantity Report tool, which allows you to create a flattened Excel report from an assembly opened in SOLIDWORKS. The same tool is available directly in PDM and doesn't require opening files, making it much faster. Because it's the same tool, but simply integrated differently, the reports generated are the same as those generated by the version running in SOLIDWORKS.

The Quantity Report lists all parts and subassemblies with their respective quantities. Report columns are configurable. You can configure multiple report types and use your own document templates. You can also set exclusion filters based on properties and file locations.

## File references repair

This tool can be used by users at any time. It allows selecting a file to repair, normally an assembly (SLDASM file). The tool will make sure to fix this assembly and all its sub-assembly levels so that they point to the correct files.

## Global replacement of components

This tool allows you to replace one file with another in all assemblies that use it in the vault. This eliminates the need to manually replace for each assembly. Depending on the options used, these operations can be performed without the documents even being open in SOLIDWORKS, making the operation very quick.

## Notifications

SOLIDWORKS PDM allows you to send notifications when status changes. The PDMxperts tools also offer this functionality. One of the advantages of PDMxperts notifications is that you can use a different message body for each type of notification.

## Check-in blocking based on the version of SOLIDWORKS

Monitoring can be done when checking in files to block the check-in of files that were saved with a version of SOLIDWORKS newer than the one defined for a project. It is therefore possible to define the version of SOLIDWORKS for each project. This feature is very useful for companies that have to use multiple versions of SOLIDWORKS.

## Links to Web2 Documents

An interesting feature of the PDMxperts tools allows you to create a link (https URL) for each document to its equivalent in the SOLIDWORKS PDM Web2 portal. Since the link is stored in a data card field, it can be retrieved in BOMs, Excel exports, and PDM XML exports.

## Getting data from SQL

### Obtaining associated data

This feature allows the user to obtain card data values associated with a selection. For example, selecting a product number in a list would automatically obtain the name of that product as well as the name of the supplier.

### Interdependent drop-down lists

This feature allows the user to access a series of drop-down lists. Selecting an item in a parent list updates the contents of the next list. A selection made in this second list then updates the contents of a third list, and so on.

An example of this feature would be selecting a material type from the first list (e.g., steel, aluminum, etc.). The second list would then display shapes (e.g., plates, square tubing, etc.) based on the selected material. Finally, selecting a shape would display the sizes of that shape in a third list.

SOLIDWORKS PDM already offers the principle of interdependent lists, but these are not dynamic. The PDMxperts tools update the contents of each list by pulling data from an SQL database with each selection.

## Tasks viewer

SOLIDWORKS PDM offers the principle of automated tasks, often used for exporting. The PDM administrator can track the status of each task (pending, in process, success, failure, etc.). Users without access to the administration tool therefore do not have access to this information. The PDMxperts tasks viewer is a tool that can be used by all users at any time. Each user can thus track the progress of tasks.

Note: Unlike the task tracking tool offered in the PDM administration tool, the PDMxperts tasks viewer does not allow tasks to be modified. For example, a user cannot cancel a task. The tasks view really is a viewer.

## **PDMxperts add-in for SOLIDWORKS**

### Color the assembly components according to their state

It is possible to create display states in a SOLIDWORKS assembly based on workflow states or the value of a variable. For example, a display state named after a workflow will then color each component according to its state. Approved components could then be displayed in green, those awaiting approval in orange, and so on.

### Isolate components using the search

This feature displays the PDM search tool. When the user initiates a search, this tool hides all the components that do not match the search. The only components that remain displayed are those that match the search criteria.