



SOLIDWORKS
PDM

Course Outline

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PDM TRAINING INDEX

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Course Objectives: At the end of the course, the student 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 to an online version.
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Competences Evaluation: During the class work, 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.
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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
- Setting up Quick Search

6. Columns and Bill of Materials (BOM) Views

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

7. Workflow

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

8. Notifications and Tasks

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

9. Folder Templates

- Creating Folder Template

10. File Templates

- Creating File Templates

11. Data Migration

- Migrating Legacy Data
- Data Migration
- Migrating Revisions

12. Vault Backup

- Backing Up Files Vaults

Not included:

- Installation process,

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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
- Setting up Quick Search

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

- Backing Up Files Vaults

Not included:

- Installation process,

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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 Bill of Materials (BOM)

SPECIFIC NOTES CONCERNING THIS TRAINING COURSE

Target audience : Users who do not work with SOLIDWORKS do not need to take the last lesson of the training.

Training Course: This training is usually given to a larger number of participants. In order to accommodate customers, this training is held at the client's office or online rather than in the laboratory class at SolidXperts.

Methodology: Training is based on case studies demonstrated by the instructor. Given the ease of use of PDM, there is no practical exercise at the end of each lesson.

Competences Evaluation: There is no formal competences assessment at the end of the training given the ease of use of PDM.

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

* The numbers which are not in sequential order, indicate the link in the chapters of the training:
Administration of SOLIDWORKS PDM Professional

ADMINISTRATION OF PDM

2. Administration Tool

- Administration Tool
- Color of the vaults
- Additional fields

3. Users and Groups

- Windows connection
- User settings: personalization

4-5. Folder dans File Datacards

- 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

- Creation of a folder template

10. File Templates

- Creation of a file template

12. Vault Backup

- Maintenance plan in SQL Server Management Studio

Appendix

- Import / Export of data
- Overview: Replication
- Overview: Web2
- Overview: Report generator
- Overview: PDMxperts tools, personalized programming, dispatch

USING OF PDM

2. 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"

9. Working in SOLIDWORKS

- Add-in
- Marking with eDrawings Professional

Appendix

- Utilisation des nomenclatures nommées

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)

*Training -Administration of SOLIDWORKS PDM Professional is recommended before this training

1. System Options

- Planning for SOLIDWORKS Manage
- System Architecture
- SQL Server
- Firewall Ports
- Configuration File
- SOLIDWORKS Manage Client
- Administration Options
- Essential Administrative Options
- Numbering Schemes
- Split AutoNumber

2. Connecting to SOLIDWORKS PDM Professional

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

3. Document and Record Object Types

- Record Object
- Non-Revision Controlled
- Permissions
- Document Object
- Document Object versus PDM Object
- Local Cache
- File Status
- Server Archives
- File Templates
- Template Permissions

4. Fields and Field Groups

- Fields
- Organizing Fields
- Field Groups
- Numbering by Field Group
- Sorting Records
- Default Values by Field Group
- Global Variables
- Building Equations

5. Users and Groups

- Importing Users
- Importing from Active Directory
- Users Receiving Passwords
- Resetting Passwords
- Administrators
- Importing Users from Text File
- Partial Administrators
- Special Permissions
- Groups
- Group Membership and Permissions
- Removing Permissions

6. Bills of Materials

- Bills of Materials
- Edit Existing BOM
- BOM Fields
- Creating Bills of Materials
- View Options
- The Type Field
- Importing BOM from Excel
- Formatting Spreadsheet

7. Backup, Restore, and Upgrade

- Backing Up
- Restoring the Environment
- Upgrading SOLIDWORKS Manage

8. The Web Interface

- The Web Interface
- Limitations
- Web Interface and PDM Objects
- Logging in with PDM Users

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