

A 3D CAD model of a drone is shown against a dark blue background with a faint circuit board pattern. Several components of the drone are exploded out from the main assembly, including the propellers, motor housings, and the main body. The text "SOLIDWORKS PDM" is overlaid in a bold, orange, sans-serif font.

# SOLIDWORKS PDM

## Course Outline

SOLID  PERTS  
by solidxperience

*ENSURE YOUR SUCCESS IN 3D DESIGN WITH SOLIDWORKS*

## 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.  
**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 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 Emplois Québec.  
**Course Materials:** One or more training manuals are included with the training course.  
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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
- 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

### Appendix

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

#### Not included:

- Installation process,
- Routing Setup
- CircuitWorks Setup

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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

- Backing Up Files Vaults

### 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 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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