



PDMxperts Tools



Table of Contents

Introduction	3
Creating revision documents	3
Automated task CutXperts	3
Repairing references	3
Global replacement tool	4
Notifications	4
Coming soon	4
Sending conditions.....	4
Reminder notifications.....	4
Restrict archiving according to SOLIDWORKS file version.....	4
Data retrieval from SQL	5
Associated data retrieval	5
Interdependent drop-down lists.....	5
Task viewer	5
PDMXperts add-on for SOLIDWORKS	6
Color assembly components according to their state	6
Isolate components from a search	6



Introduction

PDMxperts 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 functions don't offer, while others save time by serial processing.

Creating revision documents

This tool enables users to easily create a review request document (ECO, ECN, etc.) in a Word or Excel format, and link assigned documents to it (SOLIDWORKS, DWG, PDF, etc.).

Automated task CutXperts

CutXperts is one of the most popular tools in the ToolsXperts suite for SOLIDWORKS. This tool enables sheet metal parts, plates, or furniture panels to be exported in DXF/DWG at 1:1 scale. SOLIDWORKS PDM uses file export tasks that are usually triggered by workflows. Tasks from PDMxperts execute processing with CutXperts in the same way, via workflows. For example, approving a part will trigger its automatic export in DXF format, ready for cutting.

Repairing references

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



Global Replace tool

This tool replaces one file with another in all assemblies that use it in the vault. This eliminates the need to replace each manually. Depending on the options used, these operations can be performed without the documents even being opened in SOLIDWORKS.

Notifications

SOLIDWORKS PDM allows you to send status change notifications. PDMXperts also offers this functionality. One of the advantages of PDMXperts notifications is that you can use a different message body for each type of notification.

Coming soon

Sending conditions

The next version of PDMXperts notifications will make it possible to define sending conditions. For example, a notification could be sent only for parts manufactured in-house.

Reminder notifications

Reminder notifications can be sent by PDMXperts when a file has been in the same state for too long. SOLIDWORKS PDM also offers this possibility, but PDMXperts allows the message body to be customized for each type of notification. Additionally, a single notification is sent for all files.

Restrict archiving according to SOLIDWORKS file version

When archiving files, you can block the archiving of files saved with a SOLIDWORKS version more recent than the one defined for the project. This way, you can define the SOLIDWORKS version for each project. This feature is very useful for companies that need to use several versions of SOLIDWORKS.



Data retrieval from SQL

Associated data retrieval

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

Interdependent drop-down lists

This feature provides users with a series of interdependent drop-down lists. Selecting an item in a parent list updates the contents of the next list. A selection in this second list then updates the contents of a third, and so on.

For example, selecting a material type in an initial list (steel, aluminum, etc.), would update a second list to display shapes (plates, square tubes, etc.) according to the selected material. Selecting a shape would offer sizes of that shape in a third list.

SOLIDWORKS PDM offers the principle of interdependent lists, but are not dynamic. The PDMxperts tool updates the contents of each list by pulling data from an SQL database each time a selection is made.

Task viewer

SOLIDWORKS PDM offers automated tasks, often used for export, whose status (pending, in process, successful, unsuccessful, etc.) can be monitored by the PDM administrator. However, users without access to the administration tool have no access to this information. The ToolsXperts task viewer can be used by all users at any time, so each user can track the progress of his or her tasks.

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



PDMxperts add-on for SOLIDWORKS

Color assembly components according to their state

Users can create display states in SOLIDWORKS assemblies according to a workflow or variable value. For example, a display state defined by workflow will color each component according to its status. Approved components could be displayed in green, those awaiting approval in orange, and so on.

Isolate components from a search

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