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# SOLIDWORKS PDM TRAINING

COURSE OUTLINE

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## COURSE OUTLINE / SOLIDWORKS PDM

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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 Profession Administration Tool
- Creating a File Vault
- Creating a Local File Vault View

### 3. Users and Groups

- Creating Users
- Creating Groups

### 4. Folder Card Creation

- Data Cards Types
- Card 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
- Drawings Revisions Tables

### 8. Notifications and Tasks

- Notifications
- Conditional Notifications
- Tasks
- 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

### Annex : ToolsXperts Demo



- PDMxperts

**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.

PMT2534-ENG

## ADMINISTRATION OF SOLIDWORKS PDM STANDARD – 2 DAYS (14H)

### 1. Installation Planning

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- Planning Process
- Data Management Plan
- Implementation Plan
- Fundamentals of PDM

### 2. The Administration Tool

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- Administration Tool
- Creating a Files Vault
- Creating a Local Files Vault View

### 3. Users and Groups

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- Creating Users
- Creating Groups

### 4. Folder Card Creation

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- Data Card Types
- Cards Editor
- Design a Folder Data Card

### 5. File and Search Cards

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- Importing Data Cards
- Design a File Data Card
- Design a Search Data Card

### 6. Columns and Bill of Materials (BOM) Views

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

### 7. Workflow

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- Creating One Workflow
- Conditions
- Revisions
- Drawing Revisions Tables

### 8. Notifications and Tasks

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- Notifications
- Task (conversion as PDF only)

### 9. Data Migration

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- Migrating Legacy Data
- Data Migration
- Migrating Revisions

### 10. Vault Backup

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- Backing up File Vaults

### Appendix

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- File Types and Settings
- Toolbox Setup

### Not included :

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- Installation Process
- Routing Setup
- CircuitWorks Setup

### Annex : ToolsXperts Demo



- PDMxperts

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PMT2532-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

- 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
- Notifications

### 8. Working in SOLIDWORKS\*

- Versioning SOLIDWORKS Files
- SOLIDWORKS Add-In
- Add-In Options
- Managing local cache

\* Lesson for SOLIDWORKS users only

### Appendix

- Use of Named Bill of Materials (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.

PMT2531-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

#### 11. 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»

#### 9. Working in SOLIDWORKS

- Add-in
- Marking with eDrawings Professional

#### Appendix

- Use of named nomenclatures

#### Not included :

- Installation process
- Routing Setup and CircuitWorks Setup

#### Annex : ToolsXperts Demo



- PDMxperts
- Reportxperts

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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 Codes
- SOLIDWORKS PDM Professional API Help
- Interface Versioning

### 2. Files, Folders 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 PDM Professional 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 PDM Professional Task Add-Ins
- Task Interfaces
- Task Hooks
- The IEdm Search Interface
- The IEdm Workfl ow Mgr Interface
- The IEdm Workfl ow Interface

### Annex : ToolsXperts Demo



- PDMXperts

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PMT2333-ENG

## 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 Schem

### 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 Materials
- Creating Bills of Materials

### 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

### Annex : ToolsXperts Demo



- PDMxperts

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PMT2235-ENG