DS **SOLID**WORKS PDM Professional

OVERVIEW

CLASSROOM LENGTH: 3 days

PREREQUISITES: Basic experience with the SOLIDWORKS PDM Professional software, experience with the Windows™ operating system, and knowledge of SOLIDWORKS PDM Professional file structure and referencing.

DESCRIPTION: The focus of this course is on the fundamental skills and concepts central to the successful use of SOLIDWORKS PDM Professional. The intended audience for this course is anyone who will setup and/or administer SOLIDWORKS PDM Professional.

EDITOR COURSE:

LESSON 1:
SOLIDWORKS PDM CONCEPTS
- The Fundamentals of PDM
- What is SOLIDWORKS PDM?
- SOLIDWORKS PDM Components

LESSON 2:
SOLIDWORKS PDM USER INTERFACE
- 2SOLIDWORKS PDM Professional User Interface
- Case Study: Exploring SOLIDWORKS PDM Professional

LESSON 3:
DOCUMENT CREATION AND CHECK IN
- Case Study: Checking in Documents
- Advanced Document Check In
- Case Study: Checking in Documents with References

LESSON 4:
VERSIONING FILES
- Case Study: Versioning Files

LESSON 5:
FILE REFERENCE
- Case Study: File References
- Case Study: Copy File and References
- Case Study: Move File and References

LESSON 6:
SEARCHING
- Searching SOLIDWORKS PDM
- Case Study: Search
- Quick Search

LESSON 7:
WORKFLOW AND NOTIFICATION
- Change File State
- Case Study: Workflow

LESSON 8:
WORKING IN SOLIDWORKS
- Versioning SOLIDWORKS Files
- Case Study: Versioning File
- Managing Local Caches

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ADMINISTRATIVE COURSE:

LESSON 1:
INSTALLATION PLANNING
- The Planning Process
- Training Scenario
- The Installation Process

LESSON 2:
THE ADMINISTRATION TOOL
- Case Study: Create a New File Vault
- Create a Local File Vault View
- Setup Overview

LESSON 3:
USERS AND GROUPS
- Users
- Case Study: Creating Users
- Groups
- Case Study: Create a New Group

LESSON 4:
FOLDER CARD CREATION
- Data Cards
- Anatomy of a Data Card
- Case Study: Design a Folder Data Card

LESSON 5:
FILE AND SEARCH CARD
- Importing Data Cards
- Case Study: Design a File Data Card
- Case Study: Design a Search Data Card
- Quick Search in Windows Explorer
- Case Study: Setting up Quick Search

LESSON 6:
COLUMN AND BILL OF MATERIALS (BOM) VIEWS
- Columns
- Case Study: Columns
- Bill Of Material
- Case Study: BOM

LESSON 7:
WORKFLOW
- Categories
- Case Study: Create Categories
- Case Study: Create New Workflows
- Revisions
- Case Study: Create New Revision Schemes
- Drawing Revision Tables
- Case Study: CAD Files Revision Scheme

LESSON 8:
NOTIFICATIONS AND TASK
- Case Study: Assign Notifications
- Case Study: Convert Task

LESSON 9:
FOLDER TEMPLATES
- Templates
- Case Study: Folder Templates

LESSON 10:
FILE TEMPLATES
- Case Study: File Templates
- Templates with Other File Types
- Case Study: ACME Specifications Template

LESSON 11:
DATA MIGRATION
- Migrating Legacy Data
- Case Study: Data Migration
- Migrating Revisions

LESSON 12:
VAULT BACKUP
- Backing Up File Vaults

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