



Course Duration: 1/2 day

Prerequisites: Basic experience with the SolidWorks software and the Windows™ operating system, and knowledge of SolidWorks file structure and referencing.

Description: The focus of this course is on the fundamental skills and concepts central to the successful use of SolidWorks Workgroup PDM. The intended audience for this course is SolidWorks users.

Lesson 1: PDM Concept and File Management

- The Four Pillars of PDM
- What is the SolidWorks Workgroup PDM Software?
- SolidWorks Workgroup PDM Overview
- SolidWorks Workgroup PDM Components
- Basic Rules
- SolidWorks File Management
- File References
- File Reference Example
- Opening Files
- Saving Files
- File Properties
- External Reference Search Order

Lesson 2: Document Check In

- SolidWorks Workgroup PDM User Interface
- Starting SolidWorks Workgroup PDM
- SolidWorks User Interface
- Getting Help
- Setting up SolidWorks Workgroup PDM
- Users Accounts
- Case Study: Checking In SolidWorks Documents
- User Options
- Document Check In Process
- Revision Scheme
- Lifecycle
- Checking in References
- Logging In/Out
- Creating Sub-projects
- Reporting

Lesson 3: Accessing Documents

- Working on Vaulted Documents
- Case Study: Modify an assembly
- Non-SolidWorks Documents

Lesson 4: SolidWorks Workgroup PDM Environment

- Searching for Documents
- Case Study: Setting Up Windows Search
- Searching for Documents in the Vault
- Case Study: Advanced Search
- Other SolidWorks Workgroup PDM Activities
- Reports
- Custom Properties
- Case Study: Adding Properties
- Drawing Revisions
- Case Study: Drawing Revisions
- Collaboration
- Case Study: Collaboration
- Printing Drawings From The Vault
- Case Study: Batch Print
- Exporting SolidWorks Workgroup PDM Files
- Automated File Properties
- Case Study: Custom Properties in Templates
- Bulk Loading Files
- Alternate Methods to Access the Vault
- Case Study: Using SolidWorks Explorer
- Functional Differences
- User Options
- SolidWorks Workgroup PDM Viewer
- Case Study: Accessing the SolidWorks Workgroup PDM Viewer
- Software Updates

Lesson 5: Toolbox and Files that are Not Revision Managed

- Toolbox Parts
- Toolbox Case Studies
- Case Study: Adding Toolbox Parts
- Files That are Not Revision Managed
- Case Study: Not Revision Managed Files
- Case Study: The Toolbox Flag
- Standard Parts
- Drag and Drop
- Case Study: Common Parts Project
- Case Study: Design Library
- Revision Bumping
- Adding Notes
- Case Study: Revision Bumping
- Removing Files From the Vault
- Explain Access
- Case Study: Remove Files From The Vault
- Managing Configuration Revisions
- Case Study: Configuration Revisions



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