

Course Duration: 2 days

Prerequisites: SolidWorks Enterprise PDM CAD Editor course, basic experience with the SolidWorks Enterprise PDM software, experience with the Windows™ operating system, and knowledge of SolidWorks Enterprise PDM file structure and referencing.

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

Lesson 1: Installation Planning

Planning for SolidWorks Enterprise PDM
The Planning Process
Training Scenario
The Installation Process

Lesson 2: The Administration Tool

SolidWorks Enterprise PDM Administration Tool
Creating a SolidWorks Enterprise PDM File Vault
Case Study: Create a New File Vault
Create a Local File Vault View
Setup Overview
Exercise 1: Create File Vault and Vault View

Lesson 3: Users and Groups

Users
Case Study: Creating Users
Groups
Case Study: Create a New Group
Exercise 2: Users & Groups

Lesson 4: Creating and Modifying Cards

File & Folder Data Cards
Anatomy of a Data Card
Case Study: Design a Folder Data Card
Case Study: Design a File Data Card
Case Study: Design a Search Data Card
Exercise 3: Variables, Serial Numbers, Lists and Data Cards

Lesson 5: Templates

Templates
Case Study: Folder Template
Case Study: File Template
Exercise 4: Templates

Lesson 6: Column and Bill of Materials (BOM) Views

Columns
Case Study: Column
Bill Of Material
Exercise 5: Create Column and BOM Views

Lesson 7: Workflow

Workflows
Categories
Case Study: Create Categories
Case Study: Modify Existing Workflow
Case Study: Create New Workflows
Revisions
Case Study: Create New Revision Schemes
Case Study: Specifications Revision Scheme
Case Study: CAD Files Revision Scheme
Case Study: Sorting State
Exercise 6: Categories and Revisions and Workflows

Lesson 8: Data Import/Export, Notifications and Tasks

Import and Export ERP Data
Case Study: Alias Set
Case Study: Export Rule
Case Study: Import Rule
Case Study: Assign Notifications
Case Study: Convert Task
Exercise 7: Data Import/Export, Notifications and Tasks

Lesson 9: File Types and Settings

File Types
User Settings



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