



SolidWorks Workgroup PDM 2012 Training Course

Course Outline

Duration: 2 days • Prerequisites: Basic experience with the SolidWorks software and Windows™ operating system, and knowledge of SolidWorks file structure and referencing.

SolidWorks Workgroup PDM

- LESSON 1** PDM Concepts and File Management
- LESSON 2** Document Check In
- LESSON 3** Accessing Documents
- LESSON 4** SolidWorks Workgroup PDM Environment
- LESSON 5** Toolbox and Files that are Not Revision Managed

Administering SolidWorks Workgroup PDM

- LESSON 1** Planning for PDM
- LESSON 2** SolidWorks Workgroup PDM Setup
- LESSON 3** Maintaining the Vault
- LESSON 4** Administrative Tasks



Training Content

SolidWorks Workgroup PDM

LESSON 1

PDM Concepts 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

AUSTRALIA
1300 CAD CAM (223 226)
www.intercad.com.au

NEW ZEALAND
0508 CAD CAM (223 226)
www.intercad.co.nz

| SYDNEY | MELBOURNE | BRISBANE | PERTH | ADELAIDE | AUCKLAND | CHRISTCHURCH |

 **SOLIDWORKS**
LET'S GO DESIGN



intercad
driving the design

continued over page...



SolidWorks Workgroup PDM 2012 Training Course

Duration: 2 days • Prerequisites: Basic experience with the SolidWorks software and Windows™ operating system, and knowledge of SolidWorks file structure and referencing.



Training Content

SolidWorks Workgroup PDM

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

Administering SolidWorks Workgroup PDM

LESSON 1

Planning for PDM

- Planning for SolidWorks Workgroup PDM
- The Planning Process
- Data Management Plan
- Transition Plan
- The VaultAdmin Tool

LESSON 2

SolidWorks Workgroup PDM Setup

- Administrator Topics
- The Vault
- Vault Backup
- Vault Restoration
- Case Study: Replace The Vault
- VaultAdmin Tool
- VaultAdmin Settings
- User Accounts
- Case Study: User Accounts
- Case Study: Groups
- Projects
- Project Access
- Project Settings
- Case Study: Copy Project Settings
- Revision Scheme
- Lifecycles

- Case Study: Create Lifecycles
- Standard Libraries
- Case Study: Common Parts
- Case Study: Toolbox Parts
- Vault Settings
- Case Study: Global Settings
- Custom Properties
- Case Study: Adding Custom Properties
- Search
- Case Study: Index the Vault
- Revision Table
- Case Study: Revision Table Properties
- Triggers

LESSON 3

Maintaining the Vault

- Maintaining The Vault
- Case Study: Vault Backup
- Case Study: Log Files
- Tree Options
- Maintaining User Accounts
- Case Study: Modify Users
- Case Study: Passwords
- Regaining Disk Space
- Case Study: Obsolete Folders

- Archiving Files
- Case Study: Archiving Files
- Update Software
- File Conversion
- Case Study: Converting Files In The Vault

LESSON 4

Administration Tasks

- Administrator Tasks
- Mapping Custom Properties
- Case Study: Property Mapping
- Copy Project
- Case Study: Copy Project
- Bulk Loading Files
- Case Study: Bulk Check In Files
- Transferring Projects between Vaults
- Case Study: Exporting Projects

AUSTRALIA
1300 CAD CAM (223 226)
www.intercad.com.au

NEW ZEALAND
0508 CAD CAM (223 226)
www.intercad.co.nz

| SYDNEY | MELBOURNE | BRISBANE | PERTH | ADELAIDE | AUCKLAND | CHRISTCHURCH |

 **SOLIDWORKS**
LET'S GO DESIGN

