



Duration: 2 Days

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

Course Outline:

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

Lesson 1: Installation Planning

- Planning for SOLIDWORKS PDM Professional
- The Planning Process
- Training Scenario
- The Installation Process

- Case Study: Create Categories
- Case Study: Create New Workflows
- Revisions.
- Case Study: Create New Revision Schemes
- Case Study: CAD Files Revision Scheme

Lesson 2: The Administration Tool

- SOLIDWORKS PDM Standard Administration Tool
- Case Study: Create a New File Vault
- Create a Local File Vault View
- Setup Overview

Lesson 8: Notifications and Tasks

- Notifications
- Case Study: Assign Notifications
- Case Study: Convert Task

Lesson 3: Users and Groups

- Users
- Case Study: Creating Users .
- Case Study: Create a New Group

Lesson 9: Folder Templates

- Templates
- Case Study: Folder Template

Lesson 4: Folder Card Creation

- Data Cards
- Anatomy of a Data Card
- Case Study: Design a Folder Data Card

Lesson10: File Templates

- File Templates
- Case Study: File Template
- Templates with Other File Types
- Case Study: ACME Specifications Template

Lesson 5: File and Search Cards

- Importing Data Cards
- Case Study: Design a File Data Card
- Case Study: Design a Search Data Card

Lesson11:Data Migration

- Migrating Legacy Data
- Case Study: Data Migration
- Migrating Revisions

Lesson 7: Workflow

- Workflows
- Categories

Lesson12:Vault Backup

- Backing Up File Vaults