



# Administrating SOLIDWORKS PDM Professional

**Length: 3 days**

**Prerequisite:** Experience with the Windows operating system.

**Description:** Administering SOLIDWORKS PDM Professional teaches the fundamental skills and concepts central to the configuration and successful use of SOLIDWORKS PDM Professional through lecture and individual hands on exercises. The intended audience for this course is anyone who will setup and/or administer SOLIDWORKS PDM Professional. This course is designed for simple implementations and supporting roles.

## Course Syllabus

### **Introduction**

- About This Course
- More SOLIDWORKS Training Resources

### **Lesson 1: Installation Planning**

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

### **Lesson 2: The Administration Tool**

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

### **Lesson 3: Users and Groups**

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

### **Lesson 4: File and Search Cards**

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

### **Lesson 5: Column and Bill of Materials (BOM)**

- Columns
- Case Study: Columns
- Bill Of Material

- Case Study: BOM

### **Lesson 6: Workflow**

- Workflows
- 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 7: Notifications and Tasks**

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

### **Lesson 8: Folder Templates**

- Templates
- Case Study: Folder Template

### **Lesson 9: File Templates**

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

### **Lesson 10: Data Migration**

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



**Lesson 11: Vault Backup**

- Backing Up File Vaults

**Appendix A: File Types and Settings**

- File Types
- User Settings

**Appendix B: Data Import/Export**

- Import and Export ERP Data
- Case Study: Alias Set
- Case Study: Export Rule
- Case Study: Import Rule

**Appendix C: Toolbox Setup**

- Toolbox Setup

**Appendix D: Routing Setup**

- Routing Setup

**Appendix E: CircuitWorks Setup**

- CircuitWorks Setup





**CADIMENSIONS IS A SOLIDWORKS  
CERTIFIED TRAINING CENTER**

CADIMENSIONS TRAINING CATALOG

