

SOLIDWORKS® PDM Standard

Administering SOLIDWORKS PDM Standard

Dassault Systèmes SolidWorks Corporation
175 Wyman Street
Waltham, Massachusetts 02451 USA

© 1995-2022, Dassault Systemes SolidWorks Corporation, a Dassault Systèmes SE company, 175 Wyman Street, Waltham, Mass. 02451 USA. All Rights Reserved.

The information and the software discussed in this document are subject to change without notice and are not commitments by Dassault Systemes SolidWorks Corporation (DS SolidWorks).

No material may be reproduced or transmitted in any form or by any means, electronically or manually, for any purpose without the express written permission of DS SolidWorks.

The software discussed in this document is furnished under a license and may be used or copied only in accordance with the terms of the license. All warranties given by DS SolidWorks as to the software and documentation are set forth in the license agreement, and nothing stated in, or implied by, this document or its contents shall be considered or deemed a modification or amendment of any terms, including warranties, in the license agreement.

For a full list of the patents, trademarks, and third-party software contained in this release, please go to the Legal Notices in the SOLIDWORKS documentation.

Restricted Rights

This clause applies to all acquisitions of Dassault Systèmes Offerings by or for the United States federal government, or by any prime contractor or subcontractor (at any tier) under any contract, grant, cooperative agreement or other activity with the federal government. The software, documentation and any other technical data provided hereunder is commercial in nature and developed solely at private expense. The Software is delivered as "Commercial Computer Software" as defined in DFARS 252.227-7014 (June 1995) or as a "Commercial Item" as defined in FAR 2.101(a) and as such is provided with only such rights as are provided in Dassault Systèmes standard commercial end user license agreement. Technical data is provided with limited rights only as provided in DFAR 252.227-7015 (Nov. 1995) or FAR 52.227-14 (June 1987), whichever is applicable. The terms and conditions of the Dassault Systèmes standard commercial end user license agreement shall pertain to the United States government's use and disclosure of this software, and shall supersede any conflicting contractual terms and conditions. If the DS standard commercial license fails to meet the United States government's needs or is inconsistent in any respect with United States Federal law, the United States government agrees to return this software, unused, to DS. The following additional statement applies only to acquisitions governed by DFARS Subpart 227.4 (October 1988): "Restricted Rights - use, duplication and disclosure by the Government is subject to restrictions as set forth in subparagraph (c)(1)(ii) of the Rights in Technical Data and Computer Software clause at DFARS 252-227-7013 (Oct. 1988)."

In the event that you receive a request from any agency of the U.S. Government to provide Software with rights beyond those set forth above, you will notify DS SolidWorks of the scope of the request and DS SolidWorks will have five (5) business days to, in its sole discretion, accept or reject such request. Contractor/ Manufacturer: Dassault Systemes SolidWorks Corporation, 175 Wyman Street, Waltham, Massachusetts 02451 USA.

Contents

Introduction

About This Course	2
Prerequisites	2
Course Design Philosophy	2
Using this Book	2
Laboratory Exercises	2
About the Training Files.....	3
Windows.....	3
Conventions Used in this Book	3
More SOLIDWORKS Training Resources.....	4
Local User Groups	4

Lesson 1: Installation Planning

Planning for SOLIDWORKS PDM Standard	6
Questions	6
The Planning Process	6
Data Management Plan.....	6
Implementation Plan.....	8
Training Scenario	9
The Installation Process	13
SQL Server Express	14
Databases	14
SOLIDWORKS PDM Standard Client.....	14

Lesson 2: The Administration Tool

SOLIDWORKS PDM Standard Administration Tool	16
Starting the Administration Tool	16
Local Settings	17
Group Policies	17
Settings	19
Creating a SOLIDWORKS PDM Standard File Vault	19
Case Study: Create a New File Vault	19
Create a Local File Vault View	30
Create a Local View	30
Why the Root Folder?	31
Sharing the Vault View	31
Setup Overview	33
View Setup Utility	33
Access Control	33
Metadata	34
Workflow	34
Vault Maintenance	34
Exercise 1: Create File Vault and Vault View	35

Lesson 3: Users and Groups

Users	38
Creating New Users	38
User Information	38
Copy Permissions	39
Case Study: Creating Users	39
User Properties	44
Groups	45
Administrative Permissions	46
Folder Permissions	46
Assigned Folder Permissions	47
State Permissions	47
Transition Permissions	50
Permissions per File	50
Search Cards	50
Bill of Materials	50
Columns	50
Warnings	51
Cache Options	51
Copy Tree	52
Change User Password	52
Delete a User	53
Managing Multiple Users	54
Missing User Login Information	55

Groups	57
Case Study: Create a New Group	57
Assign Group Permissions	60
Manage Multiple Groups	61
Exercise 2: Users & Groups	63

Lesson 4:

Folder Card Creation

Data Cards	68
Card Editor	68
Anatomy of a Data Card	69
Controls	70
Card Editor	70
Card Associations	70
Installed Cards	70
Options	71
Designing a Data Card	72
Case Study: Design a Folder Data Card	73
Static Text Control	73
Select Control	76
Image Control	76
Frame Control	77
Data Card Variables	79
Variable Editor	80
Variable Editor Functions	80
Variable Listing	81
Variable Definition	83
Variable Mappings	85
Best Practices	86
Create new variables	87
Editbox Control	88
Command Button Control	91
Combobox Dropdown Control	94
Combobox Droplist Control	96
Tab Control	97
Checkbox Control	100
Date Field control	102
Alignment Controls	104
Card Grid Settings	106
Select Font	108
Exporting Data Cards	109
Exercise 3: Folder Cards	110

Lesson 5: File and Search Cards

Importing Data Cards	112
Case Study: Design a File Data Card	112
Radio-Button Control	115
Card Control Logic	118
Search Cards	121
Case Study: Design a Search Data Card	122
Controlled Tabs.	123
Glue Controls	124
Card Search Control	125
Variable Search Control	126
Search Card Default Values	126
Quick Search in Windows Explorer	126
Case Study: Setting up Quick Search	127
Exercise 4: File Cards	129

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

Columns	132
File List Column	133
Search Column	135
Case Study: Columns	137
Bill Of Material.	138
Case Study: BOM	143
Exercise 5: Create Column and BOM Views	146

Lesson 7: Workflow

Workflows	148
Workflow Conditions	150
Creating Workflows	153
Open an existing workflow	154
Saving a Workflow	154
Rearranging the Workflow	154
Case Study: Create New Workflow	154
Workflow State	155
Workflow Transitions	160
Revisions	170
Revision Component	170
Case Study: Create New Revision Schemes	171
Transition Actions	173
Drawing Revision Tables	178
Case Study: CAD Files Revision Scheme	179
Exercise 6: Revisions and Workflows	187

Lesson 8:**Notifications and Tasks**

Notifications	190
Workflow Notifications	190
Case Study: Assign Notifications	193
Notifications Templates	197
Tasks	197
Add Tasks to Vault	197
Task Host Configuration.	198
Case Study: Convert Task.	199
Executing Tasks	205
Exercise 7: Notifications.	206

Lesson 9:**Data Migration**

Migrating Legacy Data	208
Data Migration Planning.	208
Clean Data.	208
What to Migrate	208
Case Study: Data Migration	208
Update References	210
Migrating Revisions	213
Set Revision	213

Lesson 10:**Vault Backup**

Backing Up File Vaults	218
Database Backup.	218
Archive Server Settings Backup.	219
Archive Files Backup	220