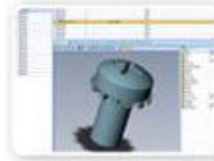


PDM Workgroup

**Jeff Holliday -
MARISUG President**

SolidWorks Workgroup PDM



It doesn't take a huge corporation to amass large design data archives. With the pace of product development today, just a few engineers can quickly create gigabytes of design data. It's easy for files to get lost or misplaced.

SolidWorks Workgroup PDM provides a simplified set of data management features, making it a good way to get your feet wet with PDM.

A real solution

The common data management "solution" of storing data in flat files on local hard drives is no solution at all. It increases the amount of time you spend looking for files and the chance of accidentally overwriting or corrupting data.

Easy to use

SolidWorks Workgroup PDM is easy to implement and manage—perfect for individuals and small work groups. A SolidWorks Workgroup PDM license is included with each SolidWorks Professional and Premium[®] license.

Everything in its right place

Workgroup PDM helps individuals and small work groups control file revisions and manage project data securely and efficiently with little or no IT support. It consolidates design data in a secure central repository (or vault) where advanced search functions let you quickly retrieve files by name, date and version. Automatic version control protects data from overwriting.

Key functions include:

- securing access to engineering data
- facilitating design re-use
- enabling a workgroup design environment
- automating revision control
- reducing time spent organizing and tracking design data
- providing rapid ROI with limited IT support

Where are we going today?

1. What are your goals?
2. What resources are available?
3. Choosing the right solution!
4. Making PDM Workgroup work for you!
 - A. Install and Set Up
 - B. What can you do with it?
 - C. Tips / Tricks / Problems (?)

Early Information Management

Word of mouth
and personal
One-on-one time
has problems.



What do you need?

Important
Considerations!

How much Document
Management do you
need?

1 - 2 Users - Could
be managed thru
Windows.

3 - 5 Users - Could
use PDM
Workgroup

6 or more Users -
Should upgrade to
Enterprise?



Welcome

Serial Number

System Check

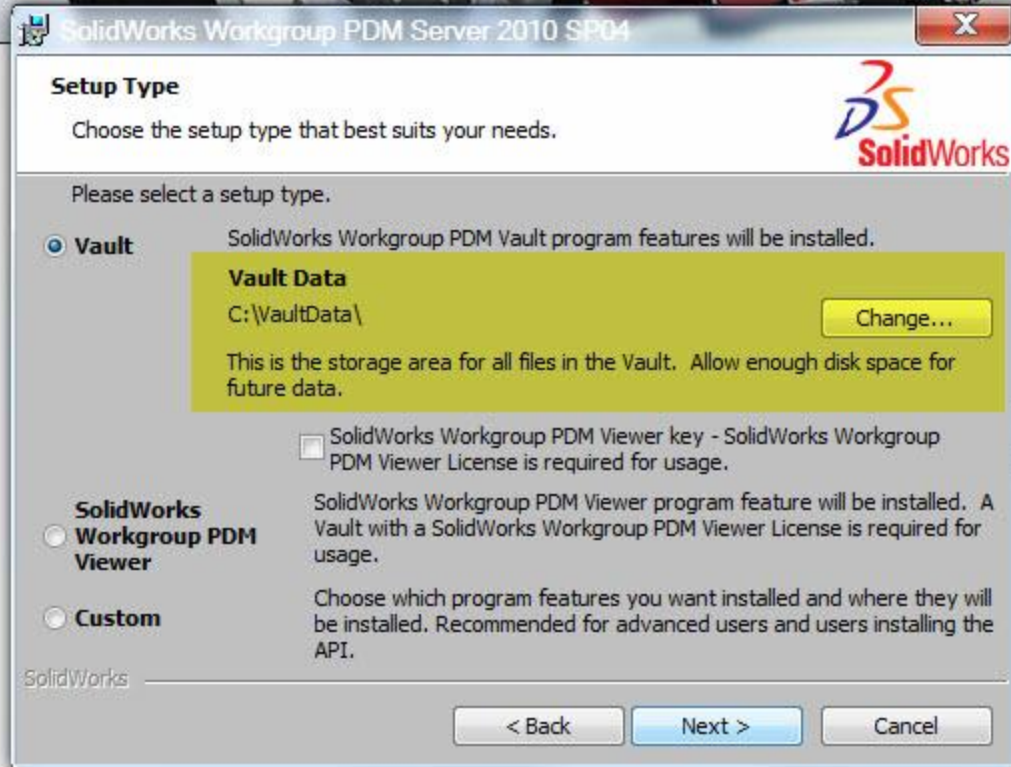
Install Servers

Download

Install

Finish

Product Selection



SolidWorks Workgroup PDM 2010 VaultAdmin - Login

Login information

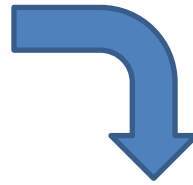
Name:

Password:

Vault computer:

Save name and vault computer

Save password



PDM Vault Admin

SolidWorks Workgroup PDM 2010 VaultAdmin

Properties Standard Libraries Triggers

Vault Settings Users and Groups Search Revision Scheme Revision Table Projects Lifecycle

Vault information

Vault computer: 4500EJH
License type: Normal
Root directory: C:\VaultData\

Vault Lock

Unlocked
 Unlocked for:
 Locked

Global settings

- Keep extra copy of latest files
- Hide projects with no access
- Force user login
- Allow revision bumping
- Allow latest revision overwrite
- Allow change document properties
- Allow users to create sub projects
- Don't allow read-only users to open docs in SolidWorks Workgroup PDM Viewer
- .prt/.asm/.drw extensions not associated with SolidWorks
- Allow attachments to documents owned by other users
- Set filesystem read-only attribute if not owner
- Allow users to rename documents in the Vault
- Enable performance email
- Bind ownership to SolidWorks read-write / read-only access
- Skip drawings validation during check in
- Create PDF files in the Vault on normal check in of SolidWorks drawings

Administrators

- engineering
- outsiders
- ejh
- other guy
- pdmwadmin

On vault startup

Validate vault

- Next startup
- Every startup

Viewing with eDrawings

- Allow markup
- Allow measure
- Allow save

Delete, Rollback, Archive documents

- No one
- Administrators only
- All users

Vault Log

Logged in as: ejh

PDM Vault Admin – Important Headings

Properties		Standard Libraries			Triggers		
Vault Settings	Users and Groups	Search	Revision Scheme	Revision Table	Projects	Lifecycle	

Users

New User Modify Delete

User	Display	Email	Comment	Filter
ejh	ejh			
other guy	other guy			
pdmwadmin				
user_r				
user_w				

Groups

New Group Modify Delete

engineering

User	Groups
<input checked="" type="checkbox"/> ejh	engineering, outsiders
<input checked="" type="checkbox"/> other guy	engineering, outsiders
<input checked="" type="checkbox"/> pdmwadmin	engineering, outsiders
<input type="checkbox"/> user_r	
<input type="checkbox"/> user_w	

Properties		Standard Libraries			Triggers		
Vault Settings	Users and Groups	Search	Revision Scheme	Revision Table	Projects	Lifecycle	

General

Enable lifecycle

Control document access using status

Allow take ownership with Read-Only access to latest document revision

Lifecycle statuses:

Preliminary (selected)

Tooling

Released

Obsolete

New Status Move Up

Delete Move Down

Select a status above to define its rules (right)

Rules for the selected lifecycle status (Preliminary)

When a document is checked in or changed to the selected status:

Change the document owner to: <do not change>

Change other document revisions at the selected status to status: <do not change>

When a document at the selected status before check in is next checked in, change the document status to: <do not change>

When a document at the selected status before check in is next checked in, allow its revision to change at these levels:

Primary Tertiary

Secondary Working copy

Do not allow a document to return to the selected or a prior status

Control access to document revisions at the selected status as follows (select in columns 1 and 2):

RO	RW	Users/Groups	Parent group(s)
--	--	engineering	
--	--	outsiders	
--	--	ejh	engineering, outsiders
--	--	other guy	engineering, outsiders
--	--	pdmwadmin	engineering, outsiders

Change status

Allow status changes on check in and allow revision levels based on the status:

In the vault before check in

Selected in the check-in dialog box

Users, groups that can change status:

Administrators

Document owner with RW access

Document owner with RO access

This user or group: <none>

Allow only administrators to change the status of previous revisions

Properties		Standard Libraries			Triggers		
Vault Settings	Users and Groups	Search	Revision Scheme	Revision Table	Projects	Lifecycle	

Revision information

From: 01 Separator Secondary Separator Tertiary Working copy

To: 99

Range Range Range

Listing Listing Listing

Sequential revising Last revision type optional

Properties		Standard Libraries			Triggers		
Vault Settings	Users and Groups	Search	Revision Scheme	Revision Table	Projects	Lifecycle	

Project commands

New Project Delete Project

Bulk Check In... Archive Project...

Copy Project...

Project permissions

Copy Project Permissions...

Administrators have RW access to all projects. Don't show Administrators below.

Define user and group access by selecting on the first 2 columns

RO = read only access (ro = inherited from a parent group)

RW = read/write access (rw = inherited from a parent group)

RO	RW	Users/Groups	Parent group(s)
--	RW	engineering	
RO	--	outsiders	
--	rw	other guy	engineering, outsiders
--	--	user_r	
--	--	user_w	

Project information

Project: Featherland

GTI sample

Description: Featherland

Parent: <root level>

Archive directory on vault computer

C:\VaultData\ArchiveDirectory Browse...

PDM Workgroup from within SW Explorer

