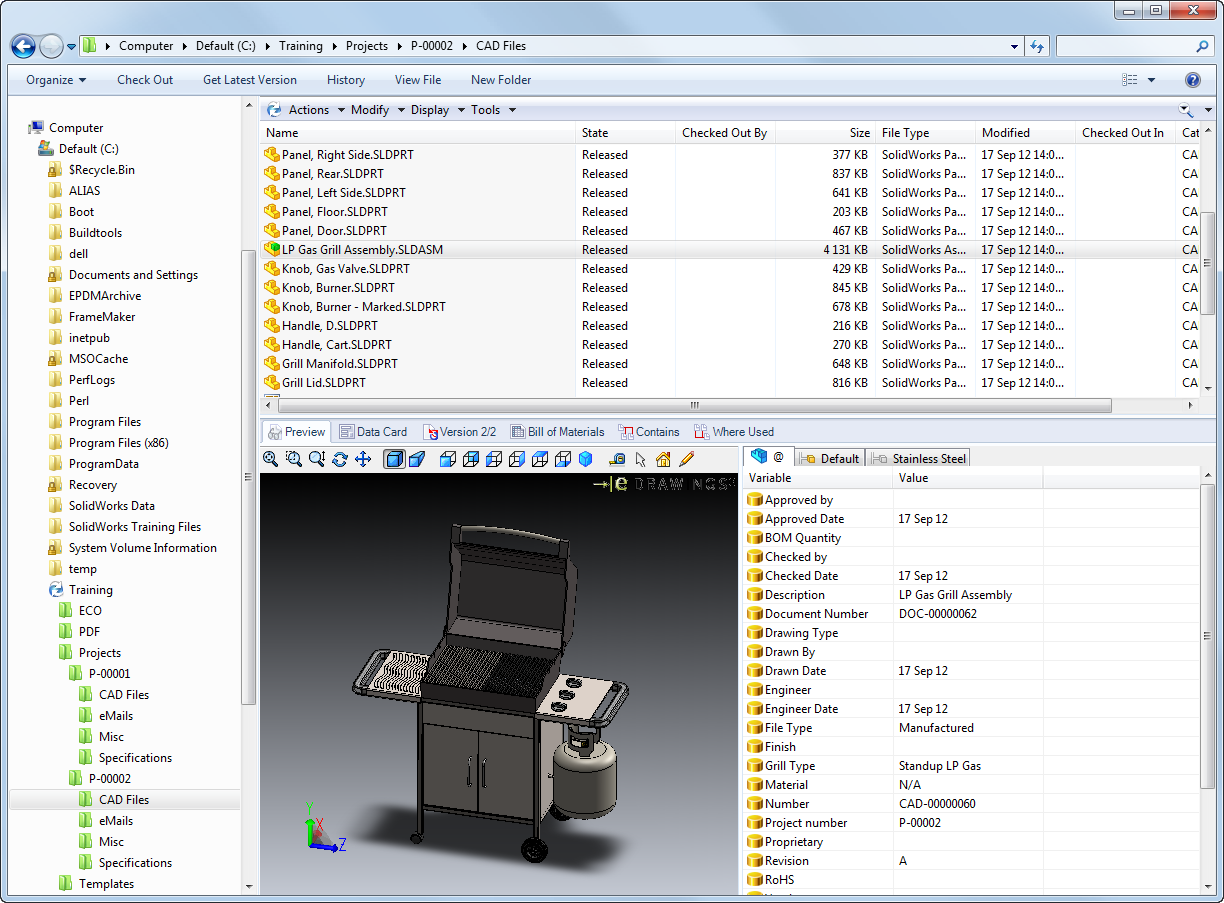
SOLIDWORKS® PDM Standard

2023 Training Vault Setup



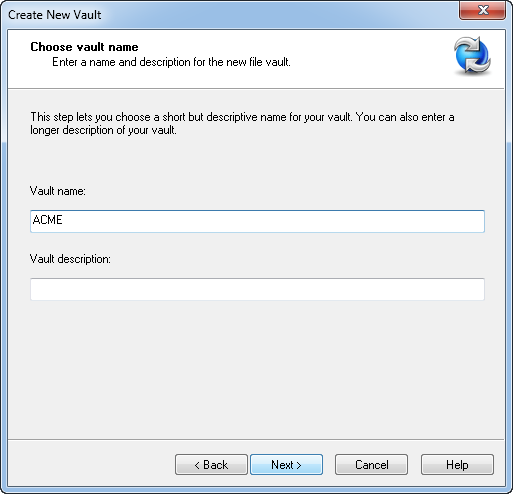
**Setup Instructions**

Follow these instructions to install the vault for the SOLIDWORKS PDM end user training.

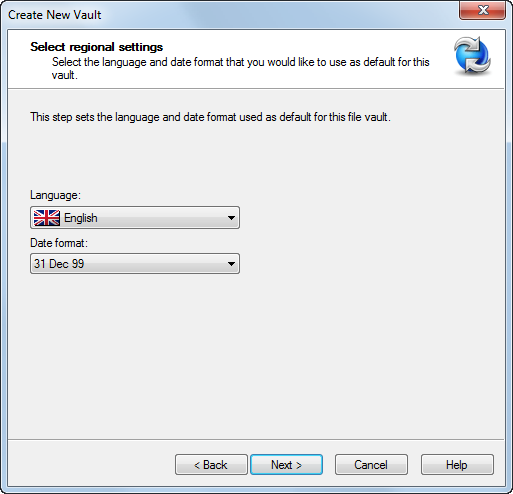
**Prerequisites:**

* Proficiency with SOLIDWORKS PDM software.
* SQL Server, SOLIDWORKS PDM Database Server, SOLIDWORKS PDM Archive Server and SOLIDWORKS should already be installed on the server machine
* SOLIDWORKS, SOLIDWORKS PDM CAD Editor client and SOLIDWORKS Composer Player should already be installed on each client machine.

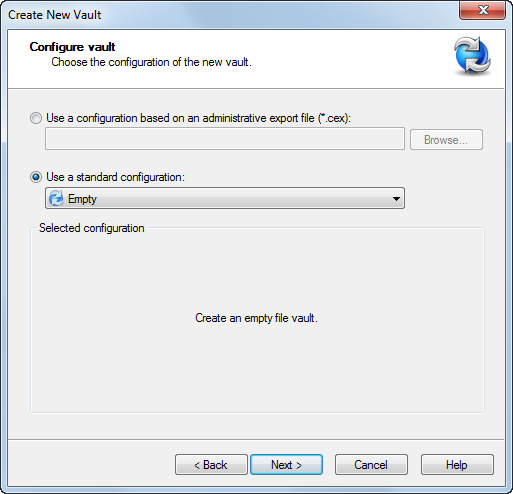
1. **Create a new SOLIDWORKS PDM file vault and a corresponding SOLIDWORKS PDM view.**
   1. In the Administration tool, right-click the archive server, select **Create new vault**, and name the vault **ACME**.



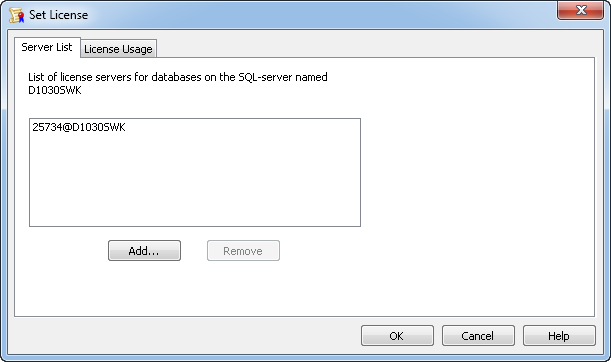
* 1. Ensure this is a **PDM Standard Server.**
  2. Continue vault creation: select appropriate language and date format:



* 1. When you get to the **Configure vault** dialog, select Use a standard configuration and select **Empty**.

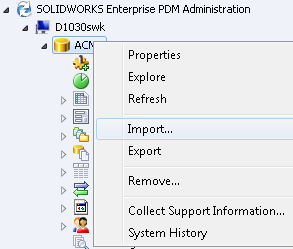


* 1. Continue until vault creation is completed.
  2. Once the file vault has been created, log in as the **Admin** user.
  3. If you have not already done so, attach PDM to the appropriate license server.



* 1. Right-click the file vault name and select **Create Local View**. Place it on your local C drive (or wherever appropriate) and ensure you “make it accessible to all users”.

1. **Import vault setup.**
   1. In the Administration tool, right click on the **Training** vault and select **Import.**



* 1. Select the file **2023TrainingVaultSTD.cex** and select **Open**.
  2. Answer **‘Yes to all’** if prompted to overwrite current values.
  3. Click **OK** to complete import.

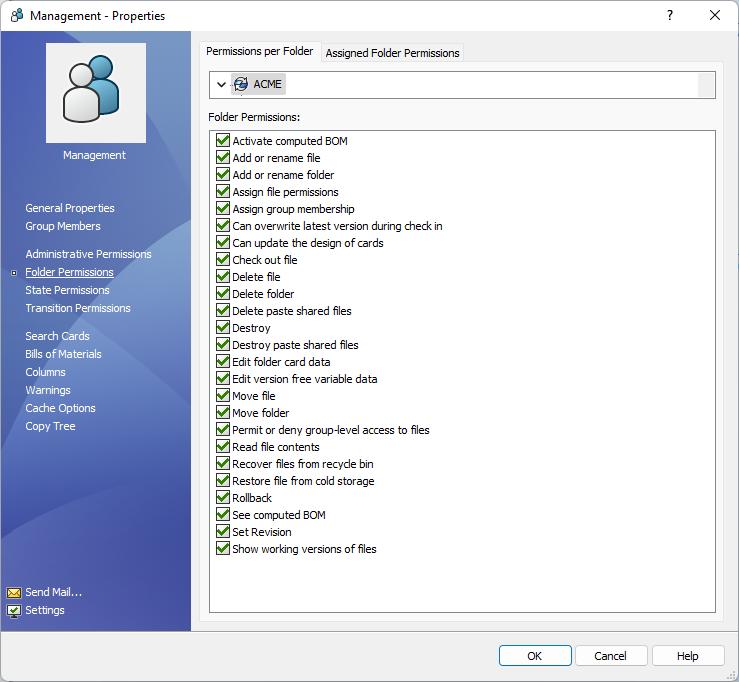
1. **Assign permissions for the Management Group.**

When the groups are created, their workflow permissions will be set, but you must assign their folder permissions.

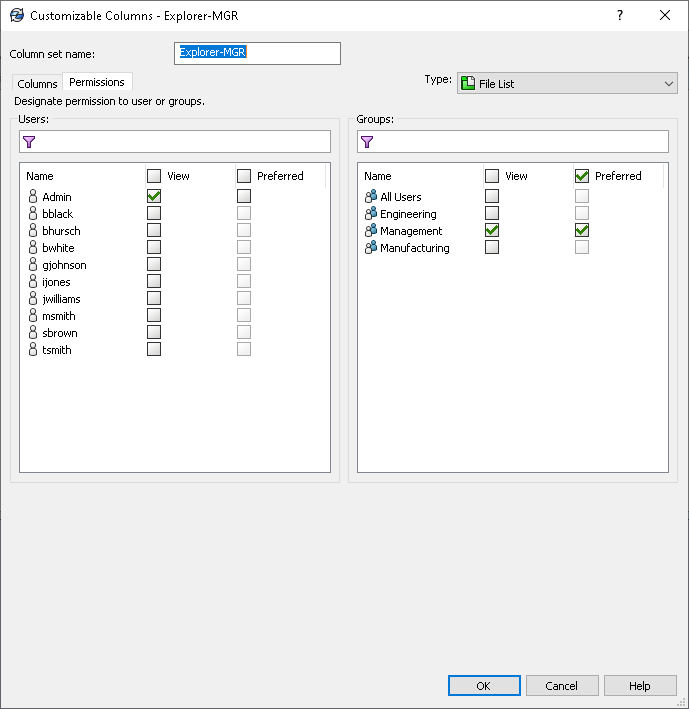
* 1. In the Administration tool, expand **Users and Groups Management, Groups** and double-click **Management**.



* 1. Select the **Folder Permissions** then select the file vault root. Select all the items under **Folder Permissions**.



1. Click **OK** to save.
2. **Set the column views:**
   1. Expand the **Columns** node, then the **File List Columns** node.
   2. Double-click **Explorer-MGR** file list column
   3. Click the **Permissions** tab, and select **View** for the **Admin** user and the **Management** group, then select **Preferred** for the **Management** group.
   4. Click **OK** to save.



* 1. Double-click **Explorer-ENG**, click the **Permissions** tab, then select **View** for **Admin** and **Engineering**, and select **Preferred** for **Engineering**.
  2. Click **OK** when finished.
  3. Expand the **Quick Search Result Columns** node and double-click **Quick Search**.
  4. Click the **Permissions** tab and select **View** and **Preferred** for **Admin** and **All Users**.
  5. Click **OK** when finished.

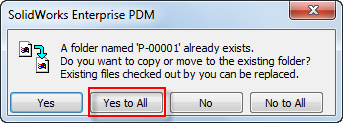
1. **OPTIONAL: Create Users for the vault based on the attendees of the course**
   1. Create “Engineering” users for each attendee of the course.
   2. Create “Management” users based on the manager of the attendees for the course.
2. **Populate vault with project folders and files.**
   1. Open Windows Explorer and login into the **ACME** vault as **Admin**.
   2. Open a second Explorer window and browse into the **Vault Folders** directory (part of the vault setup files).
   3. Copy all folders to the vault root folder.
   4. Browse into the **Projects** folder and click the **Edit Values** tab to set the folder data card for each of the 3 project folders to match the images below for **Project Number, Customer, Project Manager, Grill Type** and **Grill Size** (matching **Start Date** and **Target Date** are not necessary). (Remember to Save each card after editing values)







* 1. Browse to the **Vault Files** folder.
  2. Copy the folders **Projects** to the vault root folder. Select **Yes to All** when prompted.



* 1. Right-click the **Projects** folder and select **Check In**. (Ignore any warning messages)
  2. Make sure all files are selected and click **Check In** to complete the check in of the training files to the vault.
  3. Right-click the **Projects** folder and select **Change State**, then **No Approval Required**. Complete the change state.
  4. Select the **Projects** folder, and then select the **Modify** menu and **Set Revision**.
  5. Right-click in the **Set Revision** dialog and select **Set All New Revision Values to Card Variable Value**.
  6. Click **OK** to complete the **Set Revision** process.



1. **Assign permissions for the Engineering and Manufacturing Groups.**

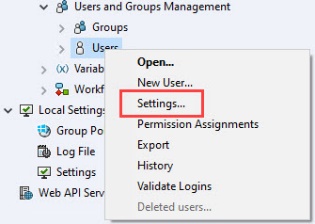
When the groups are imported, their workflow permissions will be kept, but you must assign their folder permissions.

* 1. In the Administration tool, expand **Users and Groups Management, Groups** and double-click **Engineering**.

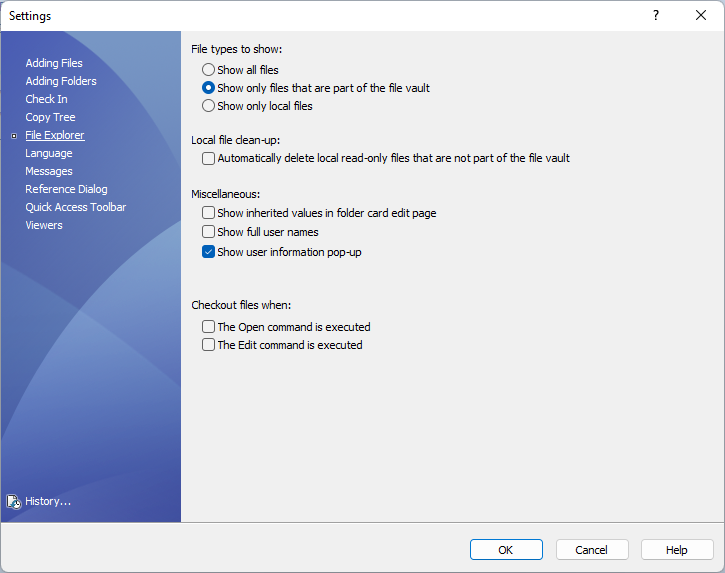


* 1. Select **Folder Permissions** and select vault root. Select everything under **Permissions** ***except****:*
     + **Assign file permissions**
     + **Assign group membership**
     + **Can update the design of cards**
     + **Set Revision**
  2. Select the folder **ECO**. Select everything under **Permissions** ***except****:*
     + **Add or rename folder**
     + **Assign file permissions**
     + **Assign group membership**
     + **Can update the design of cards**
     + **Delete Folder**
     + **Destroy**
     + **Destroy paste shared files**
     + **Rollback**
     + **Set Revision**
  3. Select the folder **PDF**. Select everything under **Permissions** ***except****:*
     + **Add or rename folder**
     + **Assign file permissions**
     + **Assign group membership**
     + **Can update the design of cards**
     + **Delete Folder**
     + **Destroy**
     + **Destroy paste shared files**
     + **Rollback**
     + **Set Revision**
  4. Click **OK** to save.
  5. In the Administration tool, expand **Users and Groups Management, Groups** and double-click **Manufacturing**.
  6. Select **Folder Permissions**, select the vault root level folder and select*:*
     + **Read file contents**
     + **Show working versions of files**
  7. Click **OK** to save.

1. **Set Users Settings**
   1. In the Administration tool, right-click **Users** and select **Settings**.

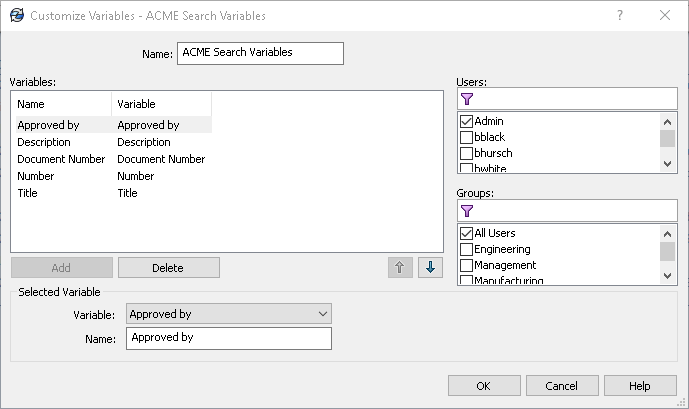


* 1. Select **Explorer** from the menu on the left, for **File types to show:** select **Show only files that are part of the file vault.**



* 1. Select **OK** to save selection.

1. **Assign Quick Search permissions.**
   1. In the Administration tool, expand the **Lists** node, then expand the **Quick Search Variable Lists** node, then double-click **ACME Search Variables**.
   2. Check the permissions for the **Admin** user and for the **All Users** group.



* 1. Click **OK** to save the permissions

**TIP: To make setup for future classes easy, back up the vault and use the backup to setup the vault. Information on backing up and restoring a vault can be found in Lesson 12 of Administering SOLIDWORKS PDM manual.**