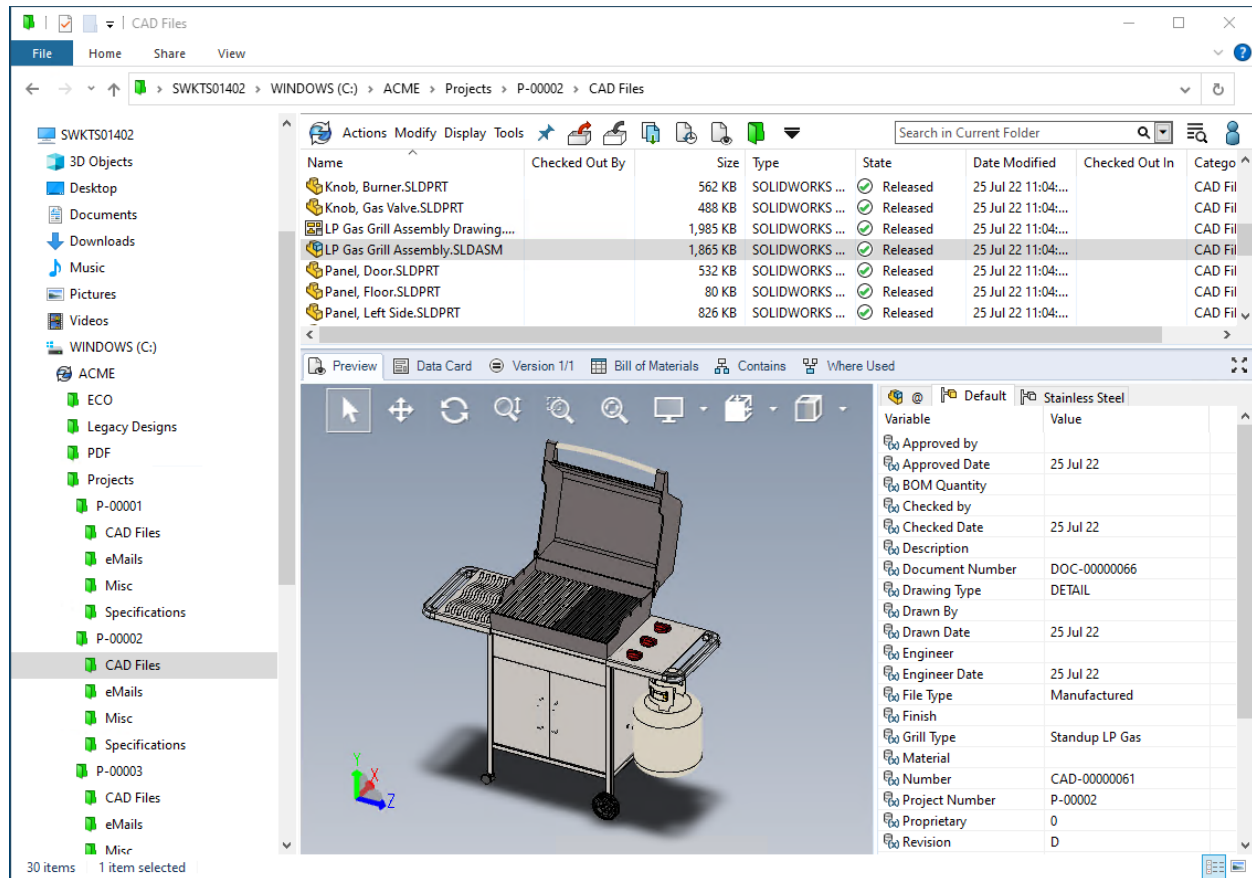


SOLIDWORKS® PDM Professional 2023 Training Vault Setup



The screenshot displays the SOLIDWORKS PDM Professional interface. The left pane shows a file tree with the following structure:

- SWKTS01402
 - 3D Objects
 - Desktop
 - Documents
 - Downloads
 - Music
 - Pictures
 - Videos
 - WINDOWS (C:)
 - ACME
 - ECO
 - Legacy Designs
 - PDF
 - Projects
 - P-00001
 - CAD Files
 - eMails
 - Misc
 - Specifications
 - P-00002
 - CAD Files** (selected)
 - eMails
 - Misc
 - Specifications
 - P-00003
 - CAD Files
 - eMails
 - Misc

The main pane shows a 3D model of a grill assembly. The right pane displays a data card for the selected file, "LP Gas Grill Assembly Drawing...".

Variable	Value
Approved by	
Approved Date	25 Jul 22
BOM Quantity	
Checked by	
Checked Date	25 Jul 22
Description	
Document Number	DOC-00000066
Drawing Type	DETAIL
Drawn By	
Drawn Date	25 Jul 22
Engineer	
Engineer Date	25 Jul 22
File Type	Manufactured
Finish	
Grill Type	Standup LP Gas
Material	
Number	CAD-00000061
Project Number	P-00002
Proprietary	0
Revision	D

Setup Instructions

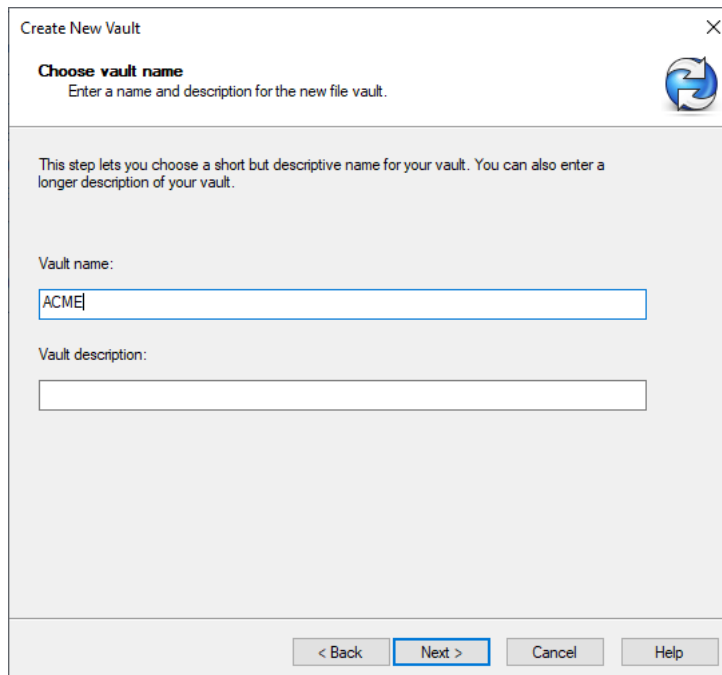
Follow these instructions to install the vault for the SOLIDWORKS PDM end user training.

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.

- I. In the Administration tool, right-click the archive server, select **Create new vault**, and name the vault **ACME**. (You may use a different vault name if desired.)



Create New Vault

Choose vault name
Enter a name and description for the new file vault.

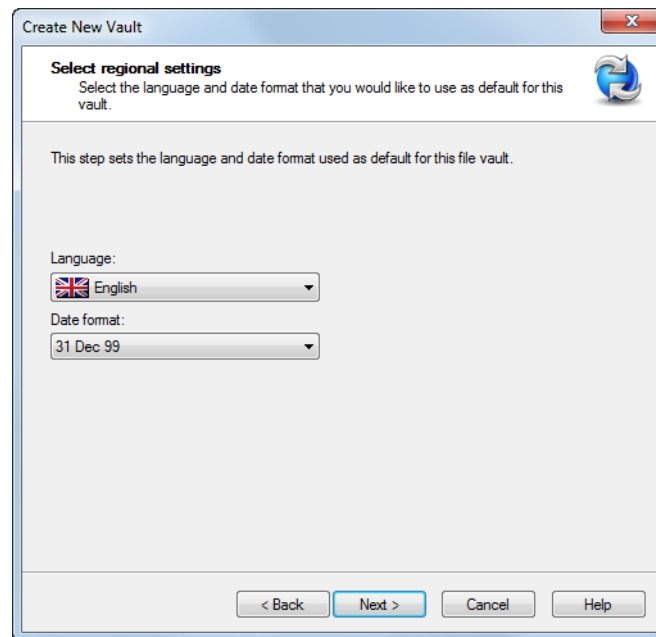
This step lets you choose a short but descriptive name for your vault. You can also enter a longer description of your vault.

Vault name:

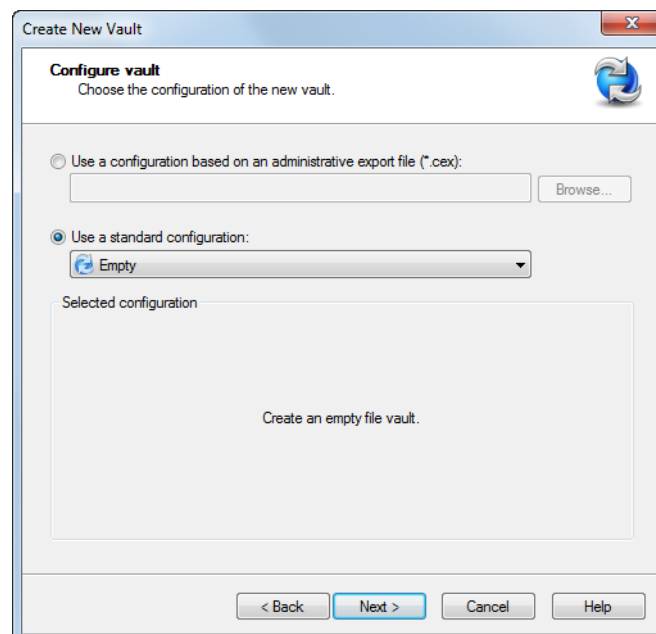
Vault description:

< Back Next > Cancel Help

- II. Ensure this is a **PDM Professional Server**.
- III. Continue vault creation: select appropriate language and date format:

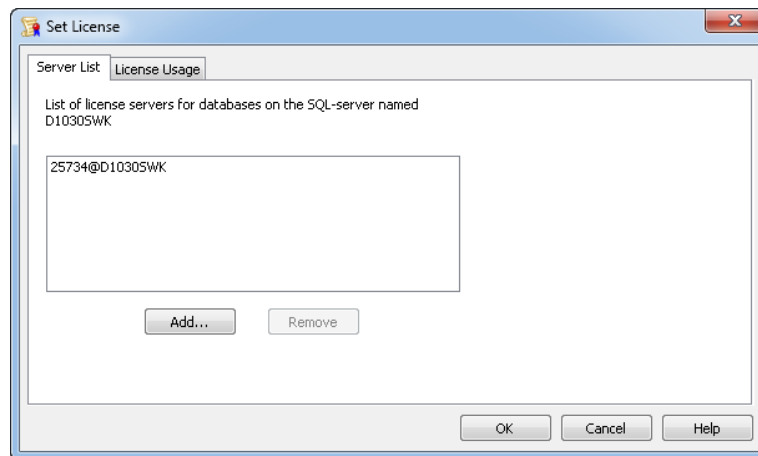


- IV. When you get to the **Configure vault** dialog, select **Use a standard configuration:** and select **Empty**.



- V. Continue until vault creation is completed.
- VI. Once the file vault has been created, log in as the **Admin** user.

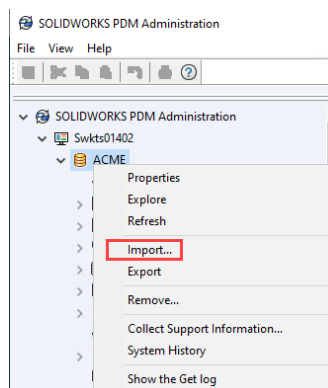
VII. If you have not already done so, attach PDM to the appropriate license server.



VIII. 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”.

2. Import vault setup.

I. In the Administration tool, right click on the **ACME** vault and select **Import**.



II. Select the file **2023TrainingVault.cex** and select **Open**.

III. Answer **‘Yes to all’** if prompted to overwrite current values.

IV. Click **OK** to complete import.

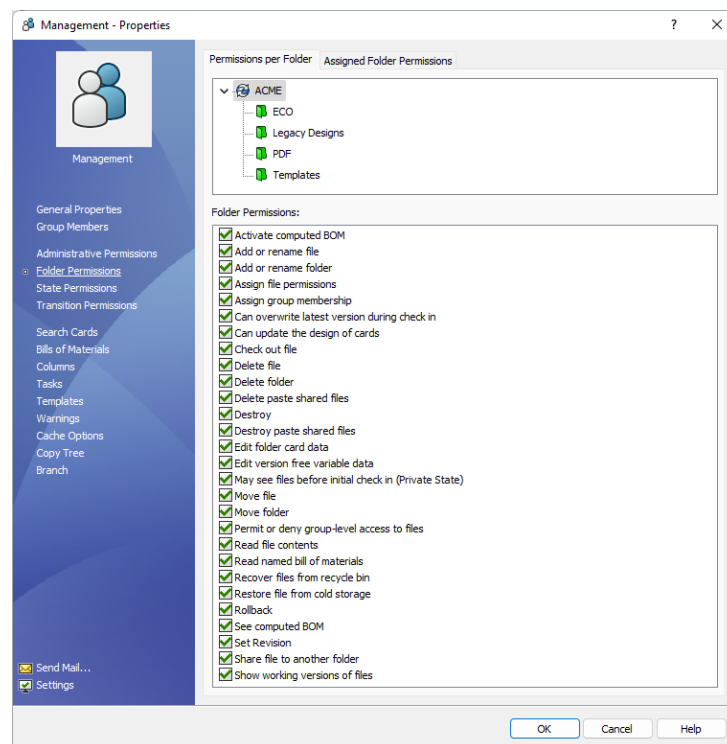
3. Assign permissions for the Management Group.

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

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



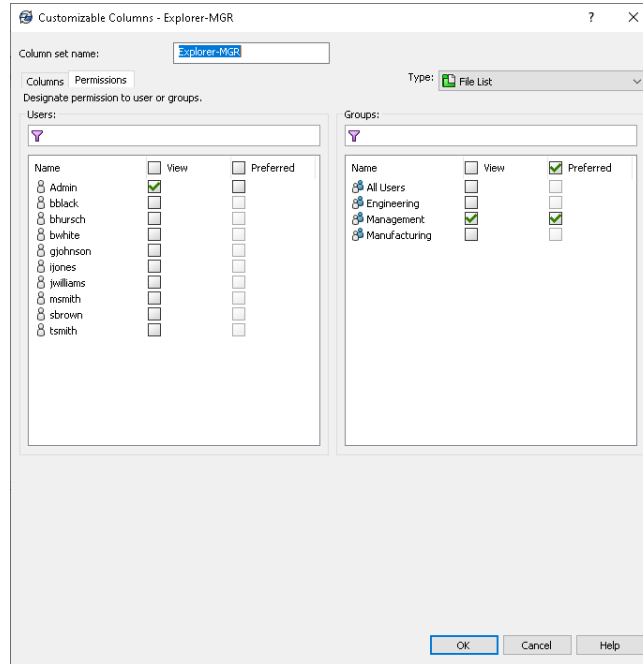
- II. Select the **Folder Permissions** then select the file vault root. Select all the items under **Folder Permissions**.



- IV. Click **OK** to save.

4. Set the column views:

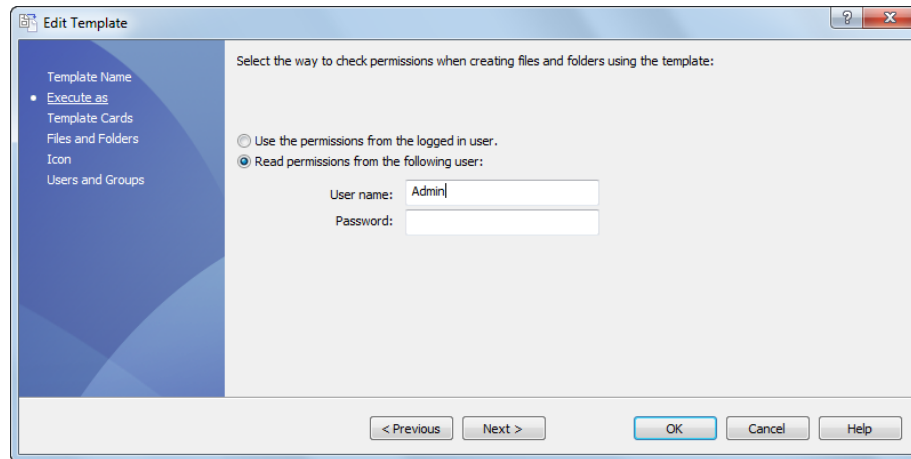
- I. Expand the **Columns** node, then the **File List Columns** node.
- II. Double-click **Explorer-MGR** file list column
- III. Click the **Permissions** tab, and select **View** for the **Admin** user and the **Management** group, then select **Preferred** for the **Management** group.
- IV. Click **OK** to save.



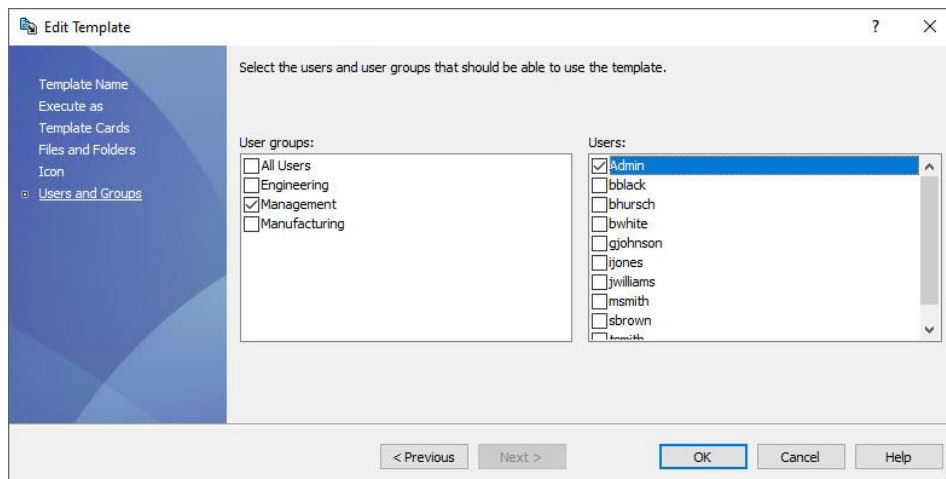
- V. Double-click **Explorer-ENG**, click the **Permissions** tab, then select **View** for **Admin** and **Engineering**, and select **Preferred** for **Engineering**.
- VI. Click **OK** when finished.
- VII. Expand the **Quick Search Result Columns** node and double-click **Quick Search**.
- VIII. Click the **Permissions** tab and select **View** and **Preferred** for **Admin** and **All Users**.
- IX. Click **OK** when finished.

5. Set permissions for project template.

- I. Expand **Templates** and double-click **Create ACME ECO** to edit the template.
- II. Select **Execute as** and select **Read permissions from the following user:** and set **User name:** to **Admin**.



- III. Select **Users and Groups** and check the **Admin** user.



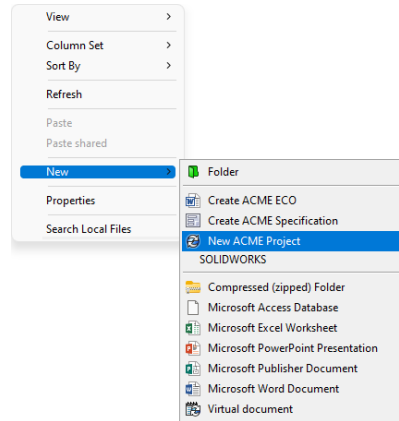
- IV. Click **OK**.
- V. Repeat the procedure for all Templates.

6. OPTIONAL: Create Users for the vault based on the attendees of the course

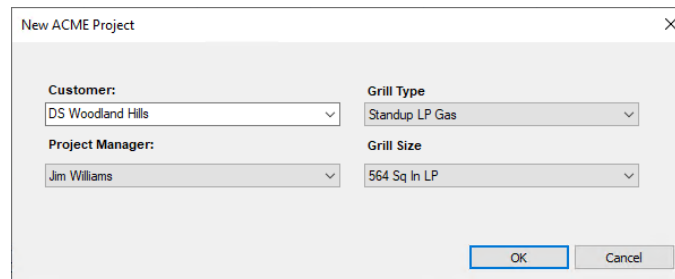
- I. Create "Engineering" users for each attendee of the course.
(Use *bwhite* for engineering user if not adding users)
- II. Create "Management" users based on the manager of the attendees for the course.
(Use *ijones* for management user if not adding users)

7. Populate vault with project folders and files.

- I. Open Windows Explorer and login into the **ACME** vault as **Admin**.
- II. Right-click in the file view and select **New ACME Project**.

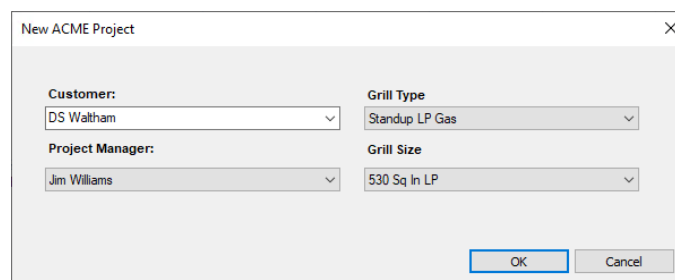


- III. Select **DS Woodland Hills** for **Customer**, select someone from the **Management** group for **Project Manager**, select **Standup LP Gas** as **Grill Type** and select **564 Sq In LP** as **Grill Size**.
- IV. Click **OK**.



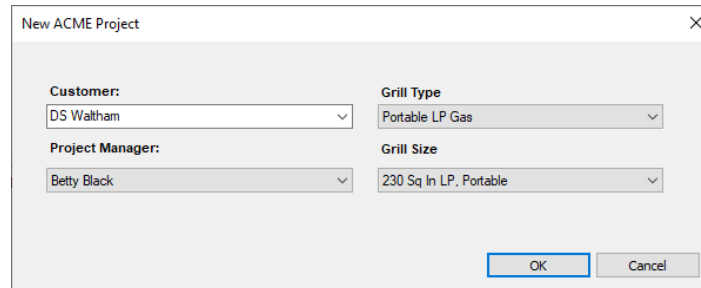
The screenshot shows the 'New ACME Project' dialog box. It contains four dropdown menus arranged in a 2x2 grid. The 'Customer' dropdown is set to 'DS Woodland Hills'. The 'Project Manager' dropdown is set to 'Jim Williams'. The 'Grill Type' dropdown is set to 'Standup LP Gas'. The 'Grill Size' dropdown is set to '564 Sq In LP'. At the bottom right, there are 'OK' and 'Cancel' buttons.

- V. Right-click in the file view and select **New ACME Project**.
- VI. Select **DS Waltham** for **Customer**, select someone from the **Management** group for **Project Manager**, select **Standup LP Gas** as **Grill Type** and select **530 Sq In LP** as **Grill Size**.
- VII. Click **OK**.



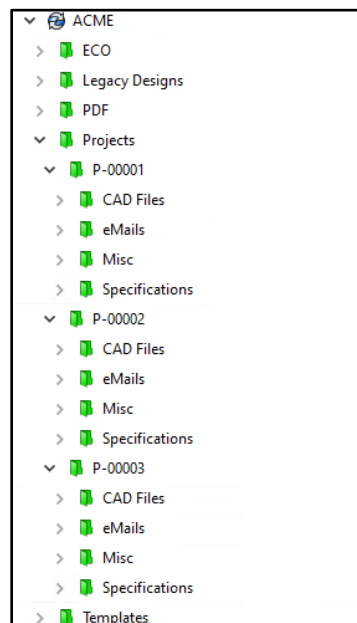
The screenshot shows the 'New ACME Project' dialog box. It contains four dropdown menus arranged in a 2x2 grid. The 'Customer' dropdown is set to 'DS Waltham'. The 'Project Manager' dropdown is set to 'Jim Williams'. The 'Grill Type' dropdown is set to 'Standup LP Gas'. The 'Grill Size' dropdown is set to '530 Sq In LP'. At the bottom right, there are 'OK' and 'Cancel' buttons.

- VIII. Right-click in the file view and select **New Acme Project**.
- IX. Select **DS Waltham** for **Customer**, select **Betty Black** for **Project Manager**, select **Portable LP Gas** for **Grill Type** and **230 Sq. In. LP, Portable** for **Grill Size**.
- X. Click **OK**.



The dialog box titled "New ACME Project" contains four dropdown menus arranged in a 2x2 grid. The top-left dropdown is labeled "Customer:" and shows "DS Waltham". The top-right dropdown is labeled "Grill Type" and shows "Portable LP Gas". The bottom-left dropdown is labeled "Project Manager:" and shows "Betty Black". The bottom-right dropdown is labeled "Grill Size" and shows "230 Sq In LP, Portable". At the bottom right of the dialog are two buttons: "OK" and "Cancel".

- XI. Open a second Explorer window and browse into the **Vaulted Files** directory (part of the vault setup files).
- XII. Copy the folders **P-00001** and **P-00002** to **Projects**. Select **Yes to All** when prompted.
- XIII. Right-click the **Projects** folder and select **Check In**. (Ignore the warning messages) (Make sure all files are selected before clicking **Check In** to complete the check in of the training files to the vault.)
- XIV. Right-click the **Projects** folder and select **Change State**, then **Data Migration**. Complete the change state.
- XV. Select the **Projects** folder, and then select the **Modify** menu and **Set Revision**.
- XVI. Right-click in the **Set Revision** dialog and select **Set All New Revision Values to Card Variable Value**.
- XVII. Click **OK** to complete the **Set Revision** process.
- XVIII. Copy the **Templates** folder into the root level of the vault. Select **Yes to All** if prompted.
- XIX. Right-click the **Templates** folder and select **Check in**, then click **Check In** to complete the check in of all of the template files.



8. 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.

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



- II. 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

- III. 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

- IV. 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

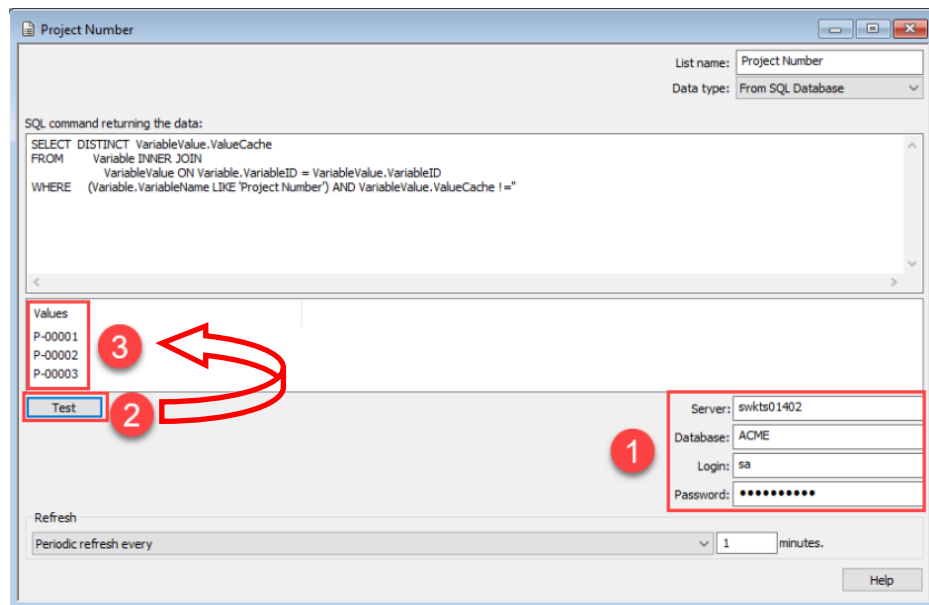
- V. Click **OK** to save.

- VI. In the Administration tool, expand **Users and Groups Management, Groups** and double-click **Manufacturing**.
- VII. Select **Folder Permissions**, select the vault root level folder and select:
 - **Read file contents**
 - **Show working versions of files**
- VIII. Select the folder **Templates**. Uncheck all checked boxes.
- IX. Click **OK** to save.

9. Set List Properties

There is a list that queries the vault database to return a project number. It must be modified to work with your training server.

- I. In the Administration tool, expand **Lists**, then expand **Card Lists** and double-click **Project Number**.
- II. Set the **Server**, **Database**, **Login** and **Password** fields to match your training server.
Note: The login and password fields refer to the SQL Server credentials. (ie: sa)



Project Number

List name: Project Number

Data type: From SQL Database

SQL command returning the data:

```
SELECT DISTINCT VariableValue.ValueCache
FROM Variable INNER JOIN
VariableValue ON Variable.VariableID = VariableValue.VariableID
WHERE (Variable.VariableName LIKE 'Project Number') AND VariableValue.ValueCache != ''
```

Values

P-00001
P-00002
P-00003

Test

Server: svkts01402

Database: ACME

Login: sa

Password: *****

Refresh

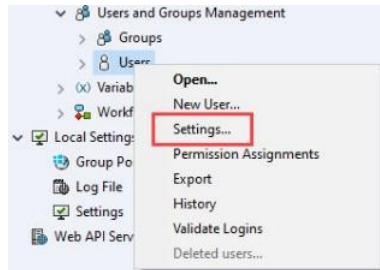
Periodic refresh every 1 minutes.

Help

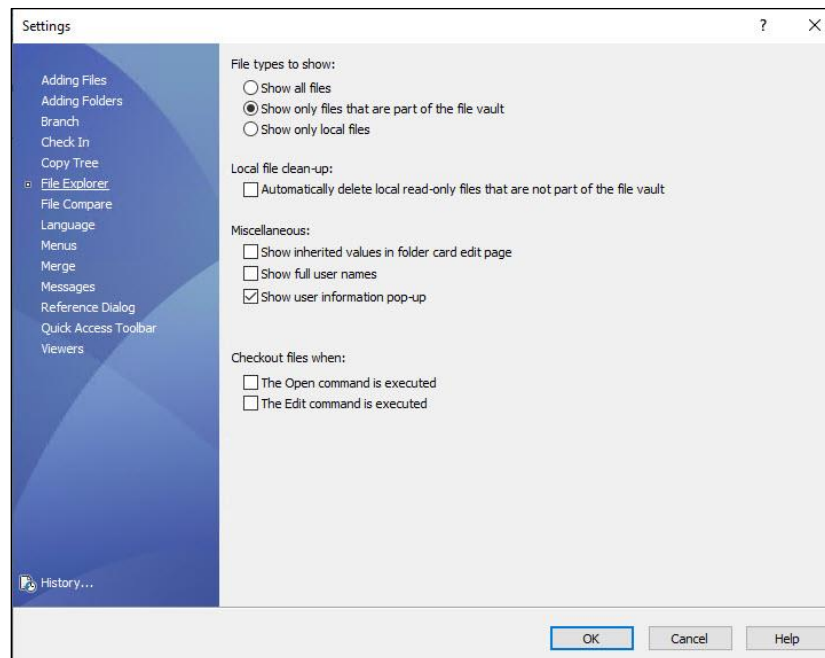
- III. Click the **TEST** button to ensure the query is working correctly
- IV. Click the **Save** icon in the upper left hand corner of the Administration tool to save the changes and close the dialog window.

10. Set Users Settings

- I. In the Administration tool, expand **Users and Groups Management**, right-click **Users** and select **Settings**.



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



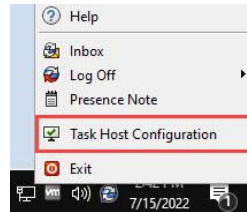
- III. Select **OK** to save selection.

11. Setup Convert Task.

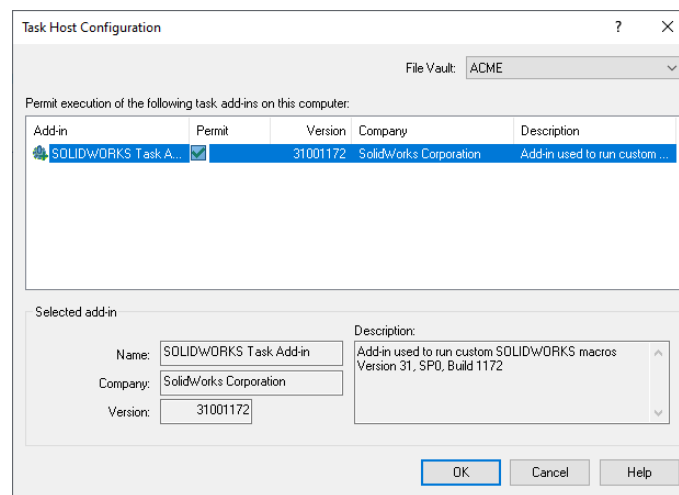
Setup of tasks will be done on the server machine, which **MUST** have SOLIDWORKS installed. (SOLIDWORKS is used to perform PDM conversions).

While the SOLIDWORKS Task add-in could be saved as part of the export, it is better to import and configure the add-in separately in order to ensure that the latest version is being utilized. (The same would apply to the Dispatch add-in if used.)

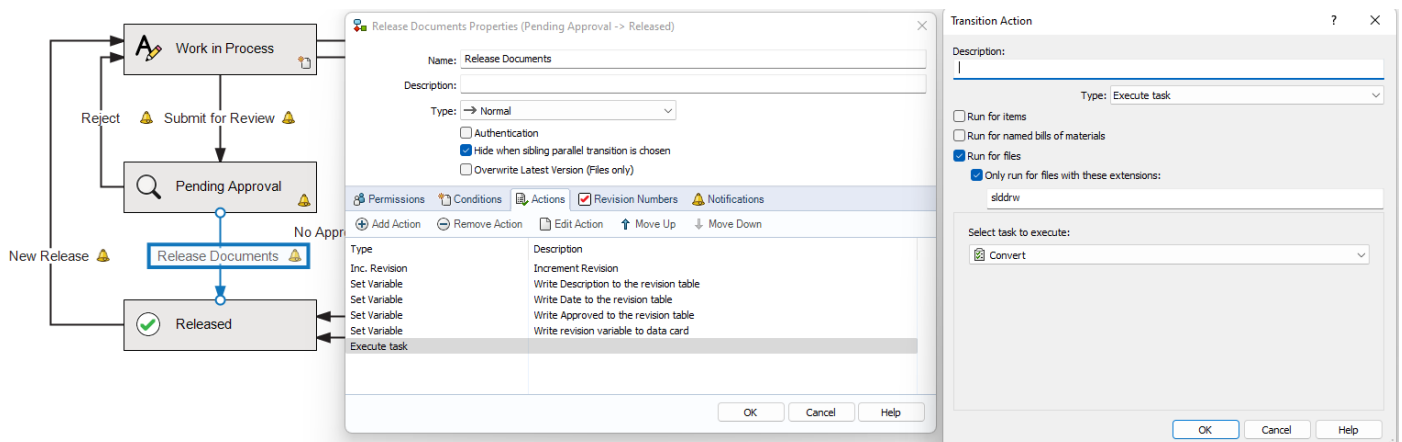
- I. In the task tray, select the PDM 'blueberry' and select **Task Host Configuration**.



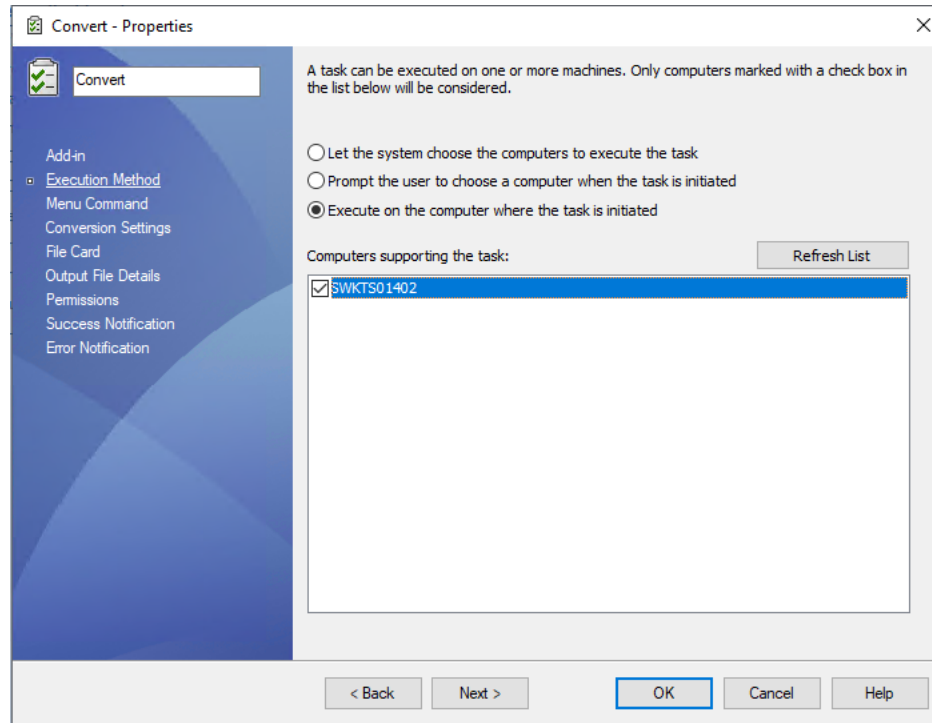
- II. In the **Task Host Configuration** dialog, check **Permit** for the **ACME** file vault and select **OK**.



- III. Open **CAD Files** workflow, click the **Release Documents** transition, select **Actions** tab and ensure **Execute task** is set to run **Covert** on **slddrw** file extensions.

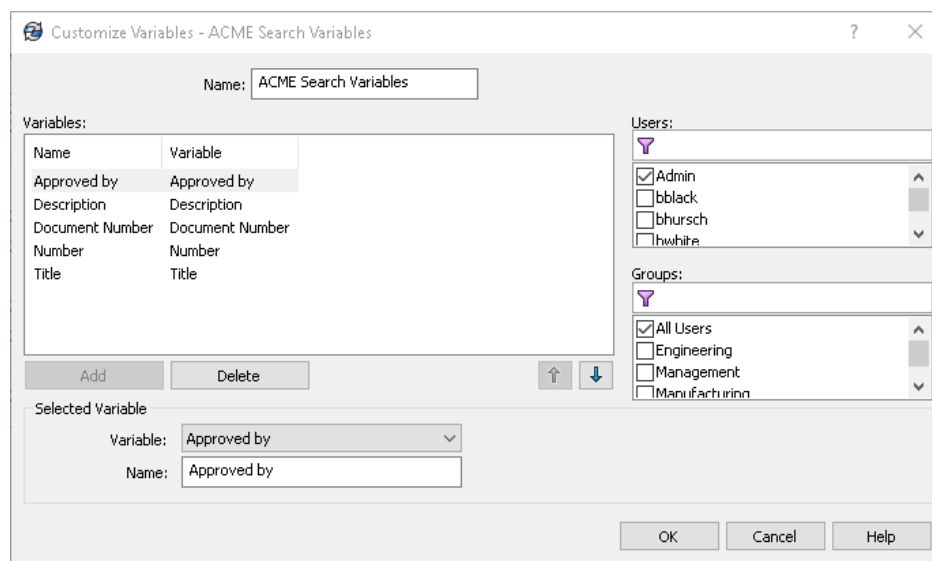


- IV. In the Administration tool, expand **Tasks**, double-click on **Convert**, (if necessary, follow the steps to upgrade the add-in) select **Execution Method**, check the machine name and click **OK** to save.



12. Assign Quick Search permissions.

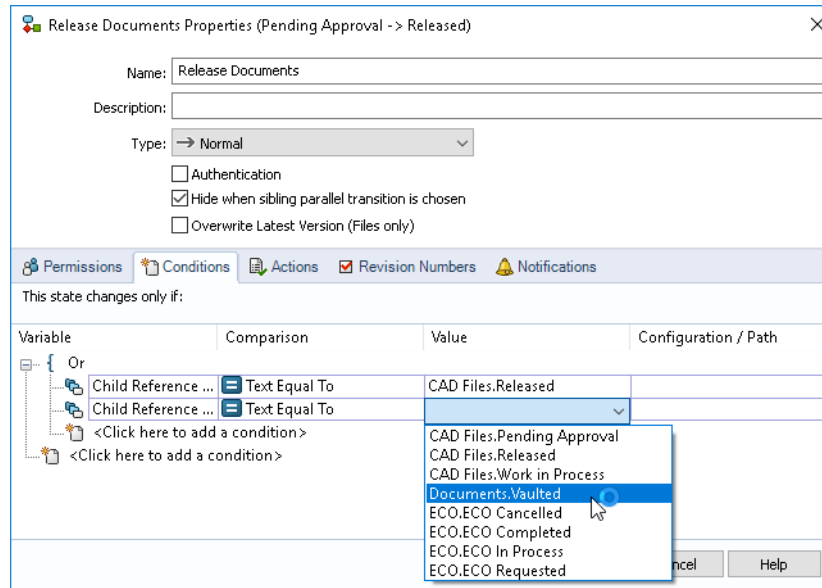
- I. In the Administration tool, expand the **Lists** node, then expand the **Quick Search Variable Lists** node, then double-click **ACME Search Variables**.
- II. Check the permissions for the **Admin** user and for the **All Users** group.



- III. Click **OK** to save the permissions.

13. Add second child reference condition.

- I. Expand the **Workflows** node, then double-click the **CAD Files** workflow.
- II. Click the transition **Release Documents** to edit this transition, then select the **Conditions** tab.
- III. Create a second child reference condition inside the **OR** folder with a **Comparison** of **Text Equal To** and a value of **Documents.Vaulted**.



- IV. Click **OK** to close the transition properties.
- V. Save and close the workflow.

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.