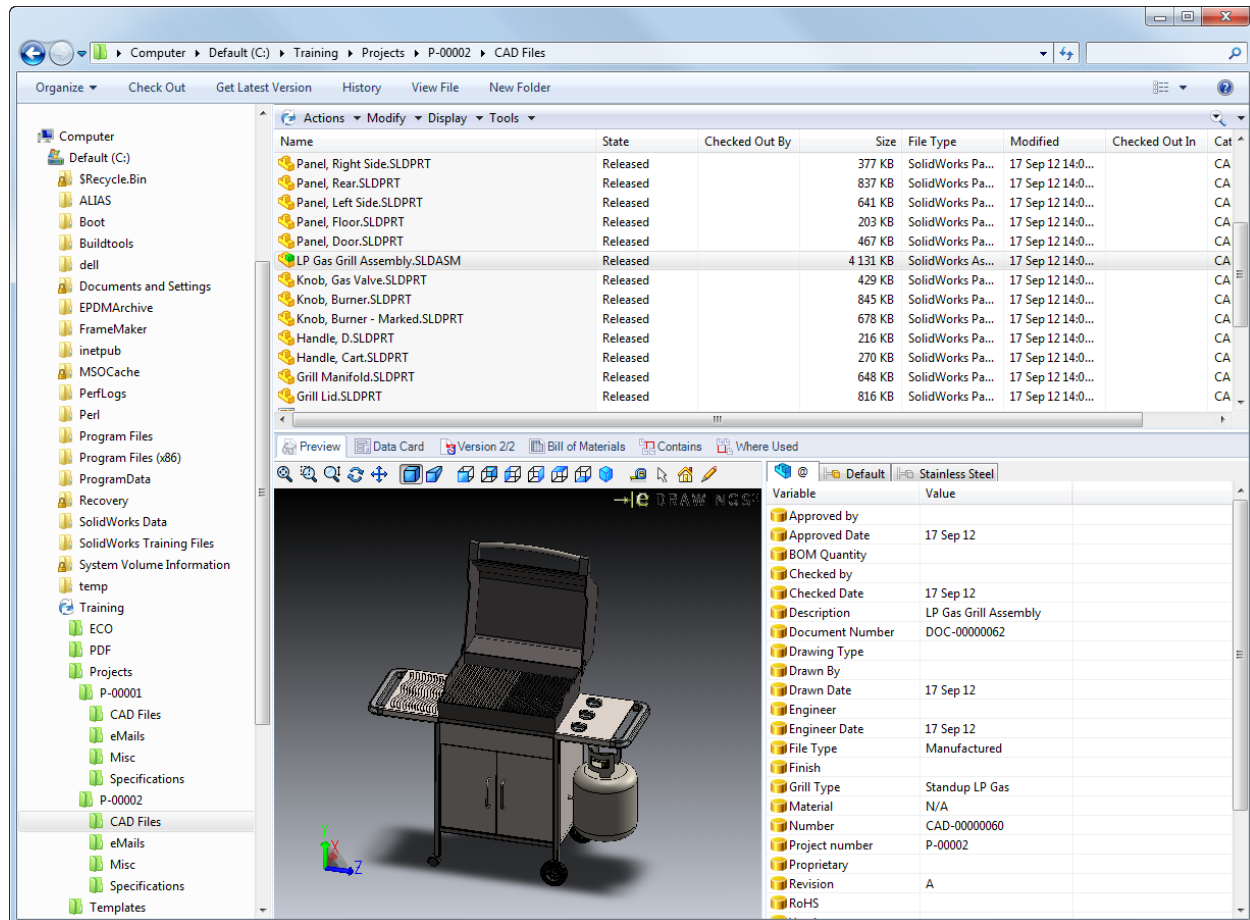


SOLIDWORKS® PDM Standard 2023 Training Vault Setup



The screenshot displays the SolidWorks PDM Standard interface. The left pane shows the file tree structure, including the 'Training' folder and its subfolders. The main pane shows a list of files in the 'P-00002' project, including various SLDPRT and SLDASM files. The right pane shows the 'Properties' tab for the selected file, displaying a table of variables and their values.

Variable	Value
Approved by	
Approved Date	17 Sep 12
BOM Quantity	
Checked by	
Checked Date	17 Sep 12
Description	LP Gas Grill Assembly
Document Number	DOC-00000062
Drawing Type	
Drawn By	
Drawn Date	17 Sep 12
Engineer	
Engineer Date	17 Sep 12
File Type	Manufactured
Finish	
Grill Type	Standup LP Gas
Material	N/A
Number	CAD-00000060
Project number	P-00002
Proprietary	
Revision	A
RoHS	

Setup Instructions

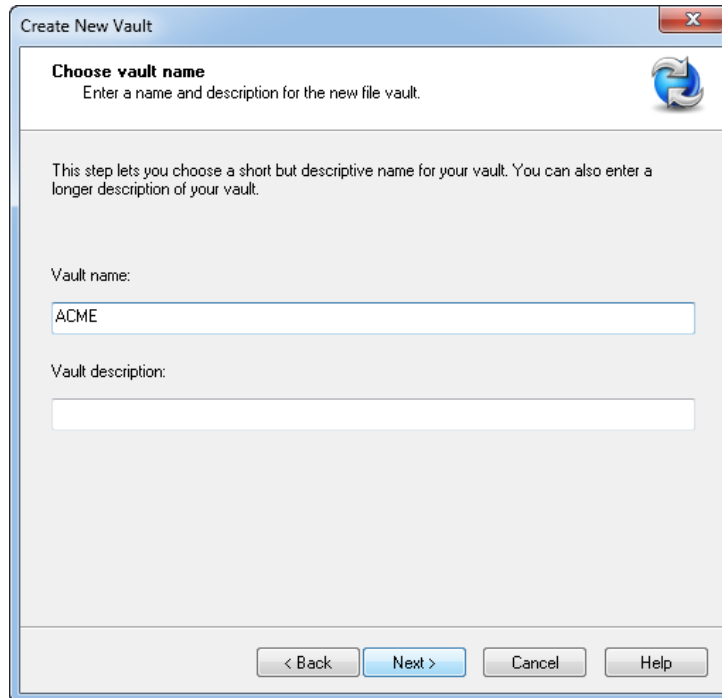
Follow these instructions to install the vault for the SOLIDWORKS PDM end user training.

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.

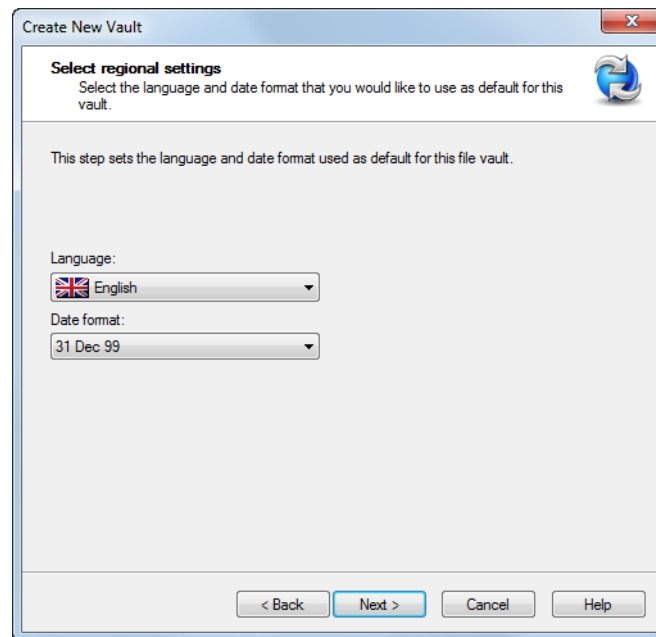
1. Create a new SOLIDWORKS PDM file vault and a corresponding SOLIDWORKS PDM view.

- I. In the Administration tool, right-click the archive server, select **Create new vault**, and name the vault **ACME**.

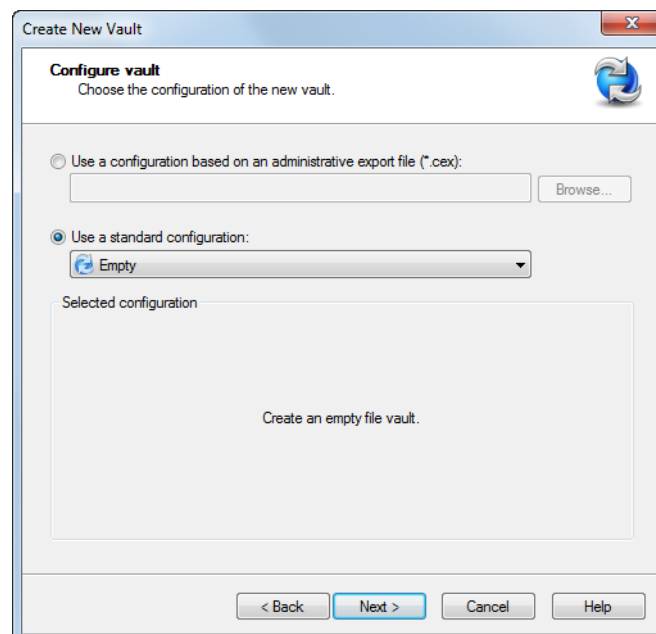


The image shows a screenshot of the 'Create New Vault' dialog box in the SOLIDWORKS PDM Administration tool. The dialog has a title bar with the text 'Create New Vault' and a close button. Inside, there is a section titled 'Choose vault name' with a sub-instruction 'Enter a name and description for the new file vault.' and a circular arrow icon. Below this, a paragraph explains: 'This step lets you choose a short but descriptive name for your vault. You can also enter a longer description of your vault.' There are two input fields: 'Vault name:' with the text 'ACME' entered, and 'Vault description:' which is empty. At the bottom, there are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

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

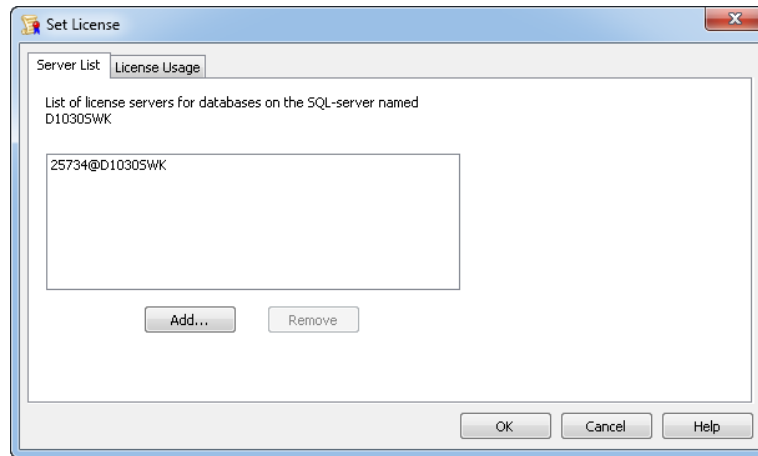


- IV. When you get to the **Configure vault** dialog, select Use a standard configuration and select **Empty**.



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

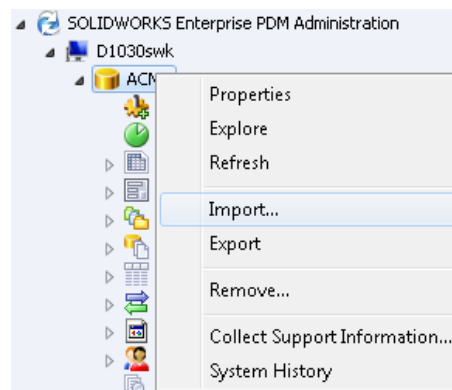
VII. If you have not already done so, attach PDM to the appropriate license server.



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 **Training** vault and select **Import**.



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

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

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

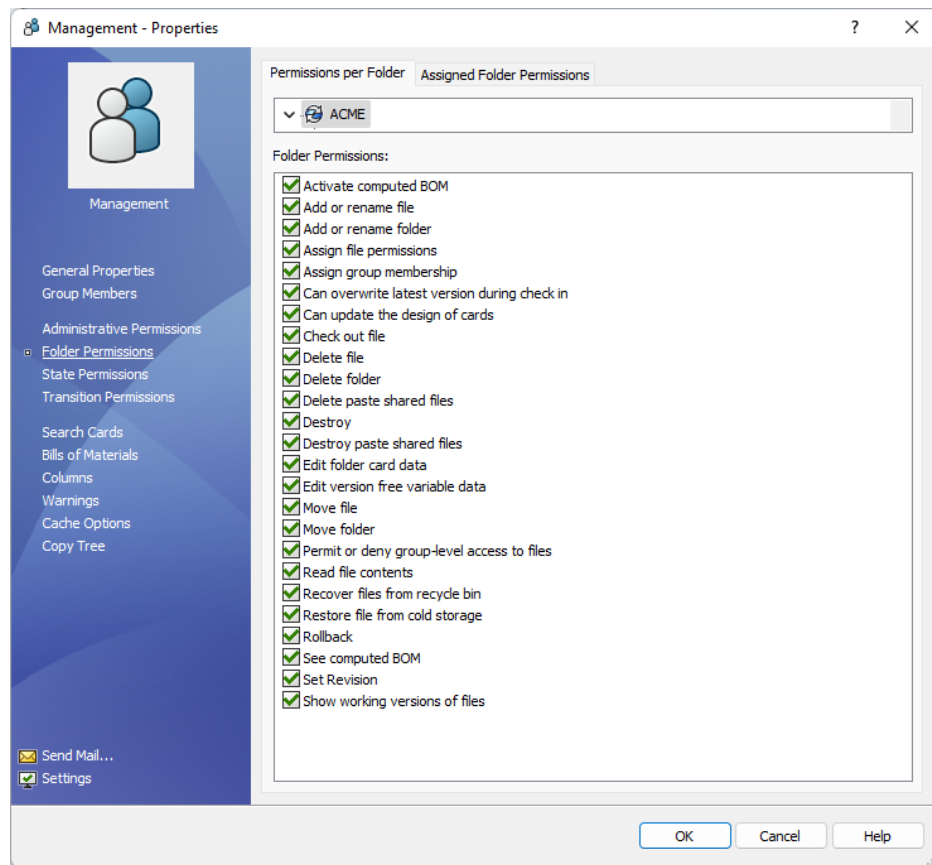
3. Assign permissions for the Management Group.

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**.



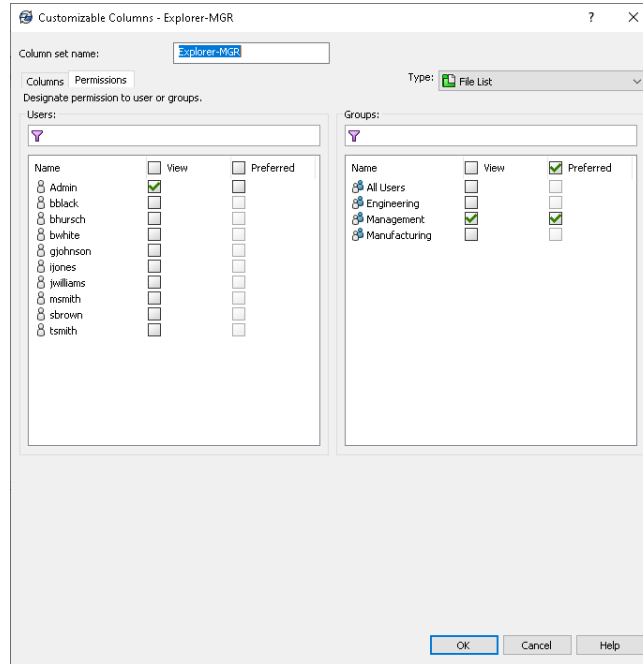
- II. Select the **Folder Permissions** then select the file vault root. Select all the items under **Folder Permissions**.



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

- I. Create "Engineering" users for each attendee of the course.
- II. Create "Management" users based on the manager of the attendees for the course.

6. Populate vault with project folders and files.

- I. Open Windows Explorer and login into the **ACME** vault as **Admin**.
- II. Open a second Explorer window and browse into the **Vault Folders** directory (part of the vault setup files).
- III. Copy all folders to the vault root folder.
- IV. 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)

View Values
Edit Values



[Visit ACME Website](#)

Project Information

Project Number:
P-00001

Customer:
DS Waltham

Project Manager:
Brian Hirsch

Start Date:
☒ 19 Nov 15

Target Date:
☐ 22 Dec 15



Grill Information
Comments

Grill Type:
Standup LP Gas

Grill Size:
480 Sq In

☐ OEM Unit

View Values
Edit Values



[Visit ACME Website](#)

Project Information

Project Number:
P-00002

Customer:
DS Woodland Hills

Project Manager:
Bob White

Start Date:
☒ 19 Nov 15

Target Date:
☐ 22 Dec 15



Grill Information
Comments

Grill Type:
Portable LP Gas

Grill Size:
380 Sq In

☐ OEM Unit

View Values
Edit Values



[Visit ACME Website](#)

Project Information

Project Number:
P-00003

Customer:
DS Vélizy

Project Manager:
Simon Brown

Start Date:
☒ 19 Nov 15

Target Date:
☐ 22 Dec 15

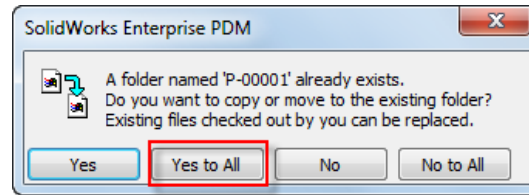
Grill Information
Comments

Grill Type:
Portable LP Gas

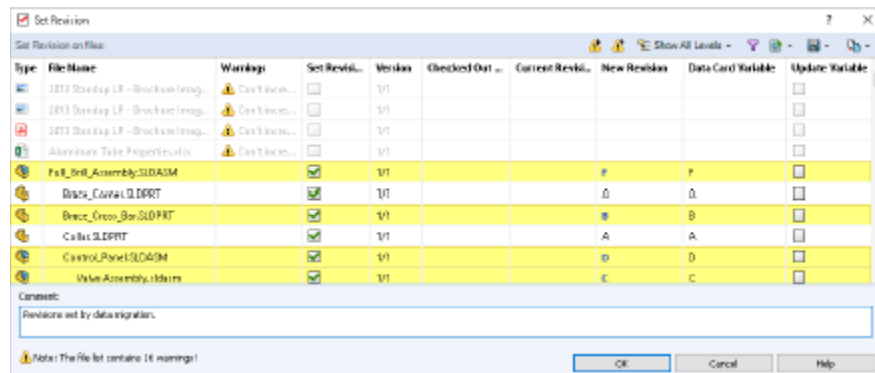
Grill Size:
224 Sq In

☐ OEM Unit

- V. Browse to the **Vault Files** folder.
- VI. Copy the folders **Projects** to the vault root folder. Select **Yes to All** when prompted.



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



7. 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.

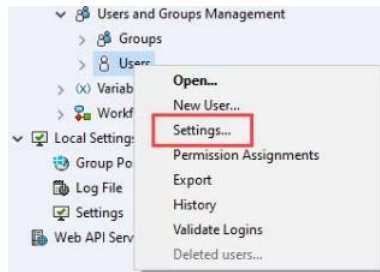
- I. In the Administration tool, expand **Users and Groups Management, Groups** and double-click **Engineering**.



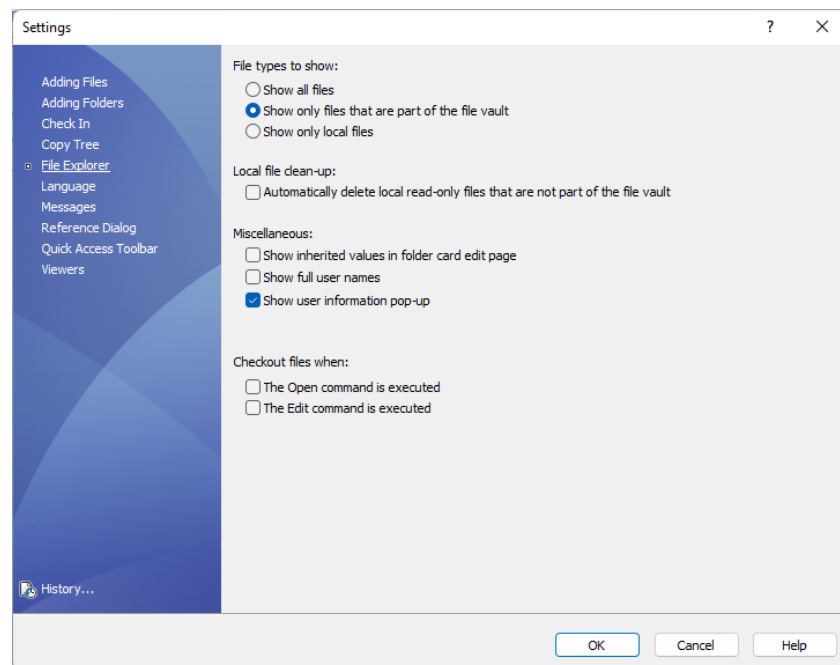
- II. Select **Folder Permissions** and select vault root. Select everything under **Permissions** except:
 - **Assign file permissions**
 - **Assign group membership**
 - **Can update the design of cards**
 - **Set Revision**
- III. Select the folder **ECO**. Select everything under **Permissions** 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. Click **OK** to save.

8. Set Users Settings

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



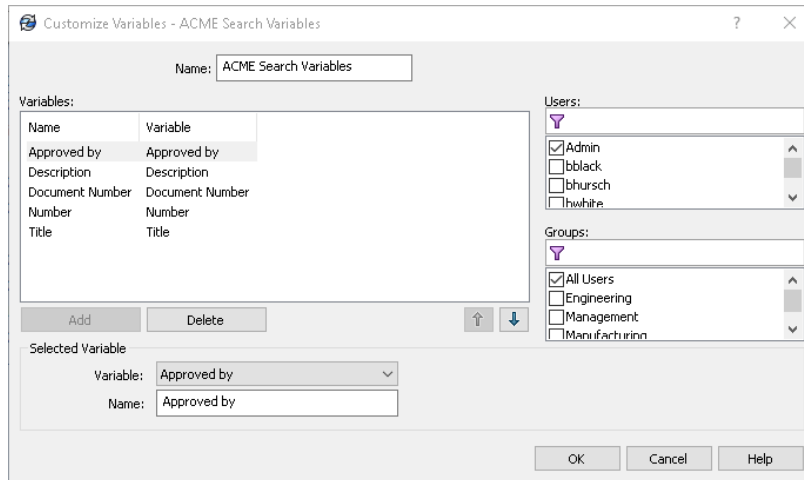
- II. Select **Explorer** from the menu on the left, for **File types to show:** select **Show only files that are part of the file vault**.



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

9. 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

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.