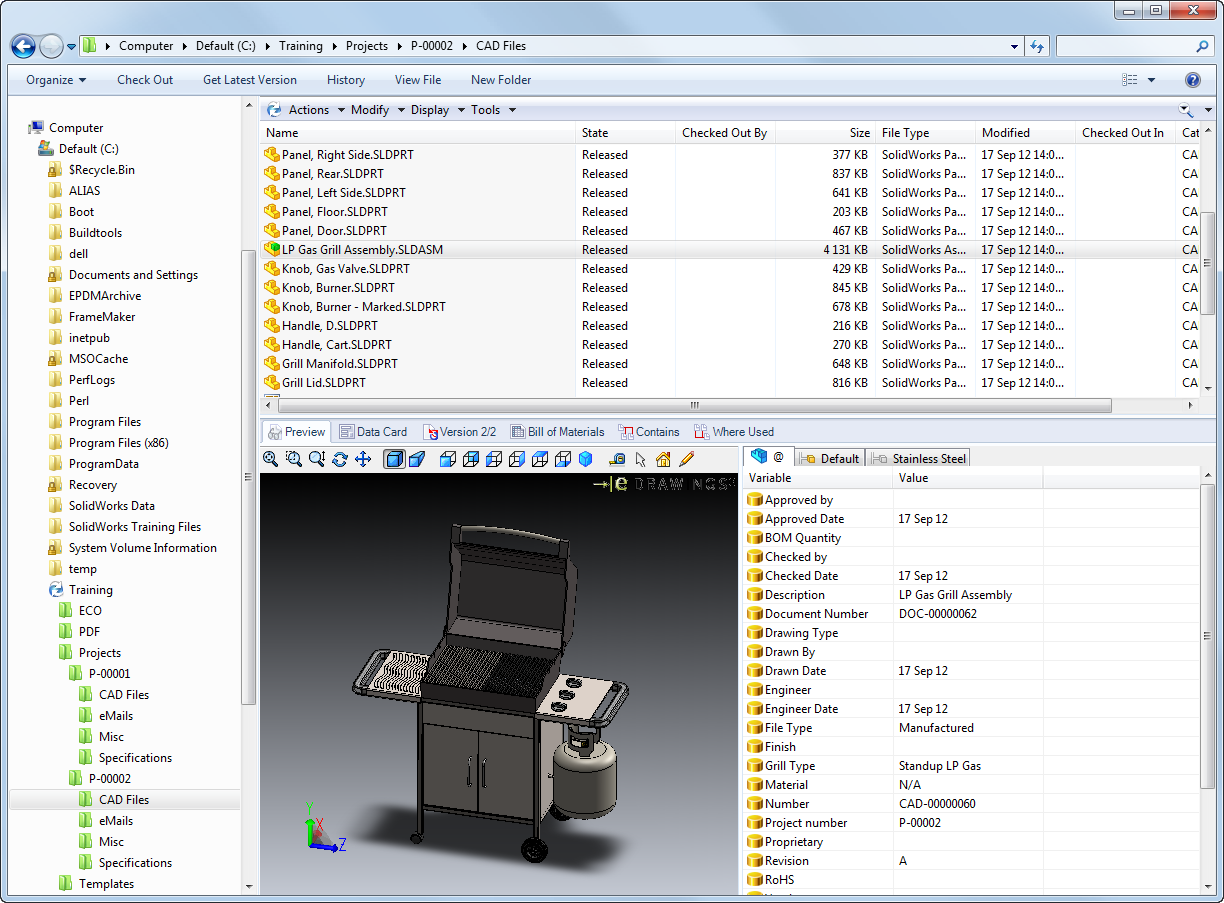
SOLIDWORKS® PDM Standard

2020 Training Vault Setup



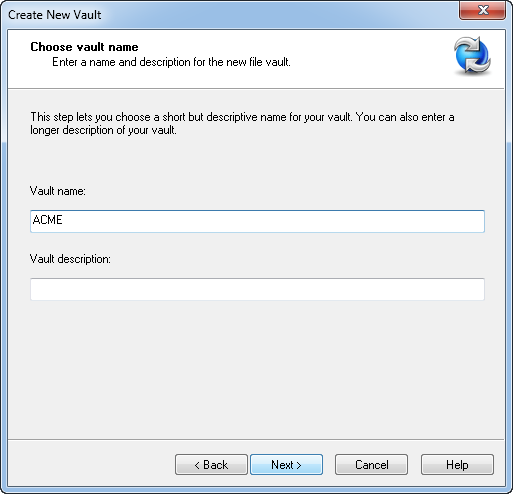
**Setup Instructions**

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

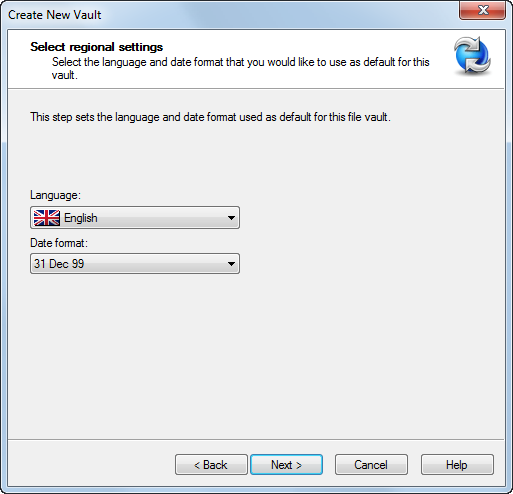
**Prerequisites:**

* 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.

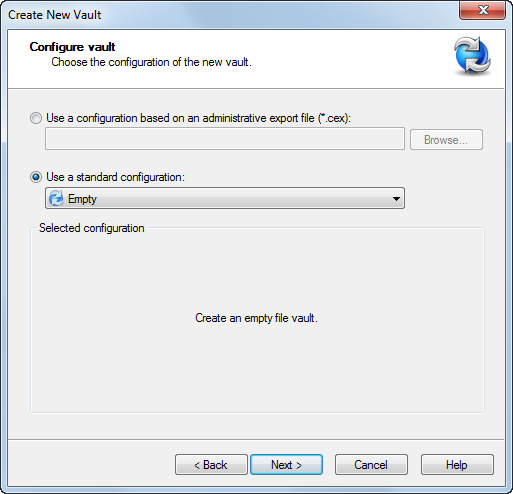
1. **Create a new SOLIDWORKS PDM file vault and a corresponding SOLIDWORKS PDM view.**
   1. In the Administration tool, right-click the archive server, select **Create new vault**, and name the vault **ACME**.



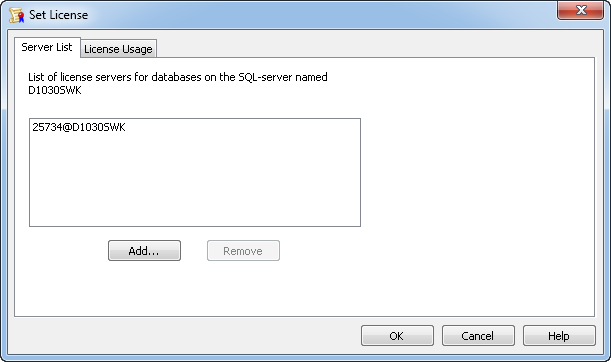
* 1. Ensure this is a **PDM Standard Server.**
  2. Continue vault creation: select appropriate language and date format:



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

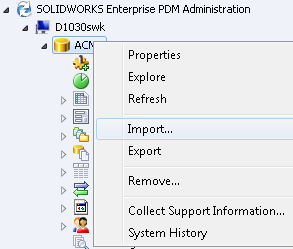


* 1. Continue until vault creation is completed.
  2. Once the file vault has been created, log in as the **Admin** user.
  3. If you have not already done so, attach PDM to the appropriate license server.



* 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 **2020TrainingVault.cex** and select **Open**.
  2. Answer **‘Yes to all’** if prompted to overwrite current values.
  3. Click **OK** to complete import.

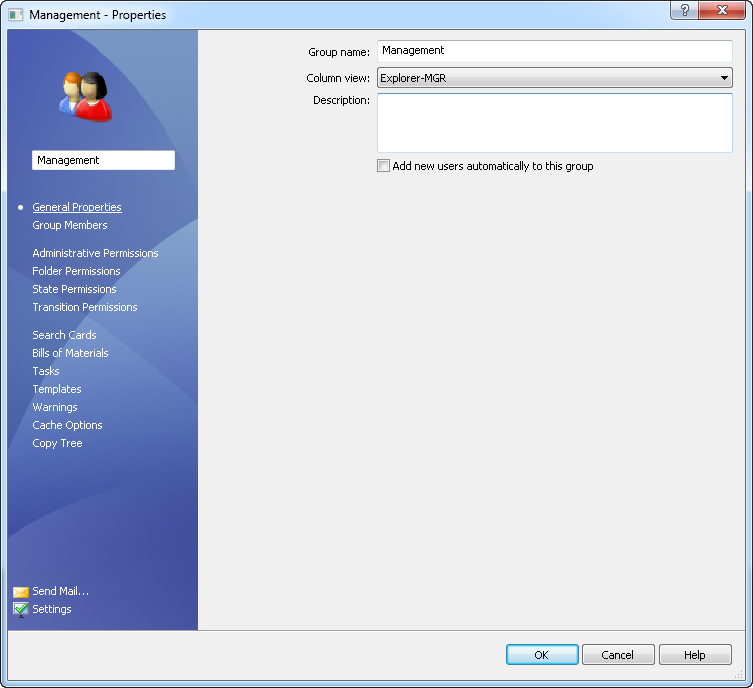
1. **Assign permissions for the Management Group.**

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

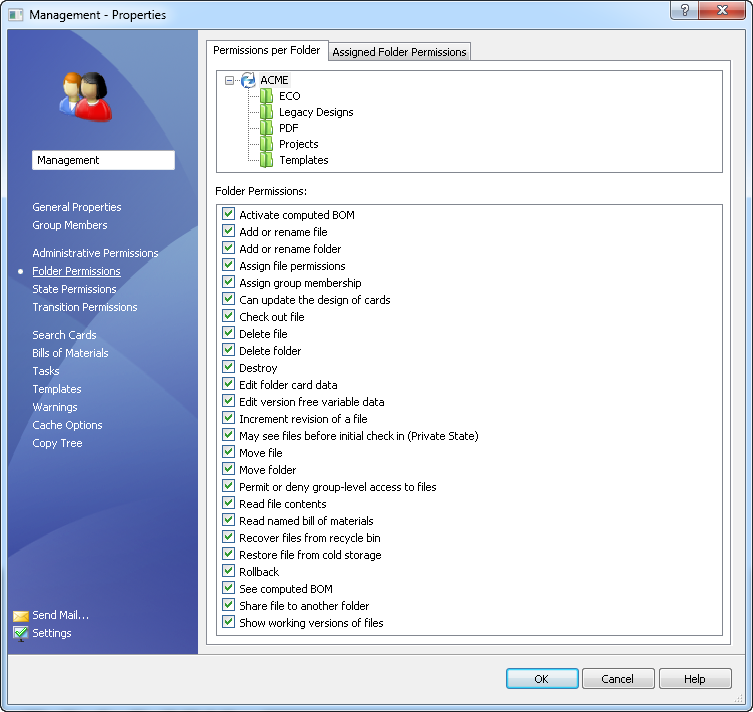
* 1. In the Administration tool, expand **Groups** and double-click **Management**.



* 1. Set the **Column view** to **Explorer-MGR**.



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



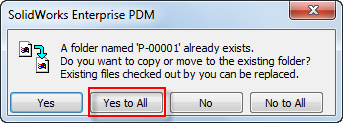
1. Click **OK** to save.
2. **Create Users for the vault based on the attendees of the course**
   1. Create “Engineer” users for each attendee of the course
   2. Create “Manager” users based on the manager of the attendees for the course. If this information is not available, create your own list of “Managers” or import the **2016Managers.cex** file.
3. **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 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).



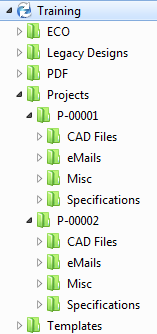




* 1. Browse to the **Vault Files** folder.
  2. Copy the folders **Projects** to the vault root folder. Select **Yes to All** when prompted.



* 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. Follow the steps in Lesson 9, starting on page 195 of the **Administering SOLIDWORKS PDM Standard** to complete the data migration process.



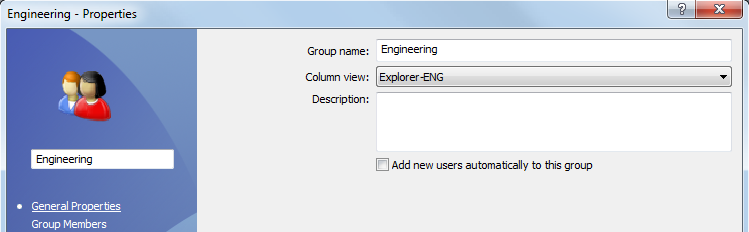
1. **Assign permissions for the Engineering and Manufacturing Groups.**

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

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



* 1. Set the **Column View** to **Explorer-ENG**.

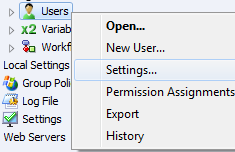


* 1. Select **Folder Permissions** and select the Vault Root folder. Select everything under **Permissions** ***except****:*
     + **Assign file permissions**
     + **Assign group membership**
     + **Can update the design of cards**
     + **Set Revision**
  2. Click **OK** to save.
  3. In the Administration tool, expand **Groups** and double-click **Manufacturing**.

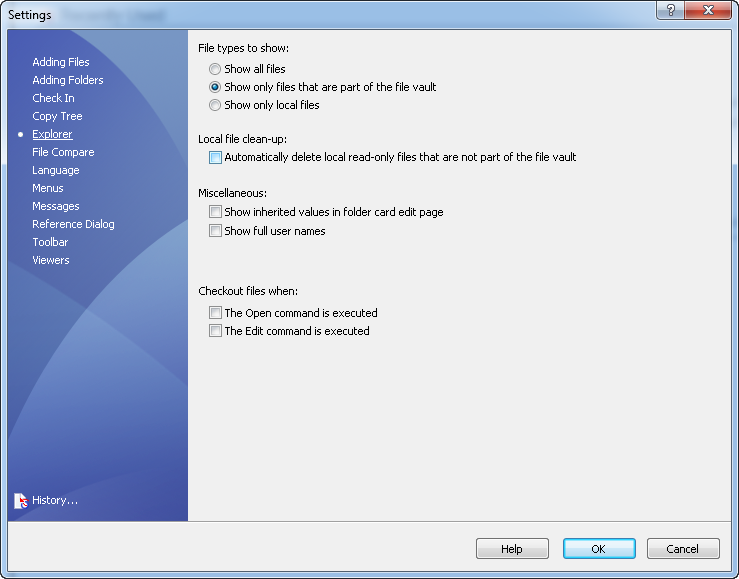


* 1. Select **Folder Permissions**, select the vault root level folder and select *:*
     + **Read file contents**
     + **Show working versions of files**
  2. Click **OK** to save.

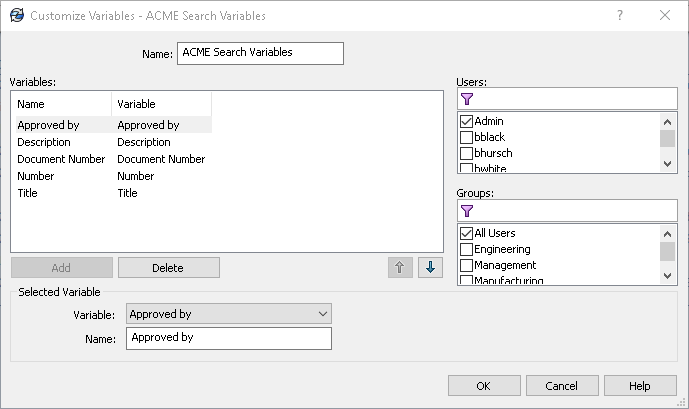
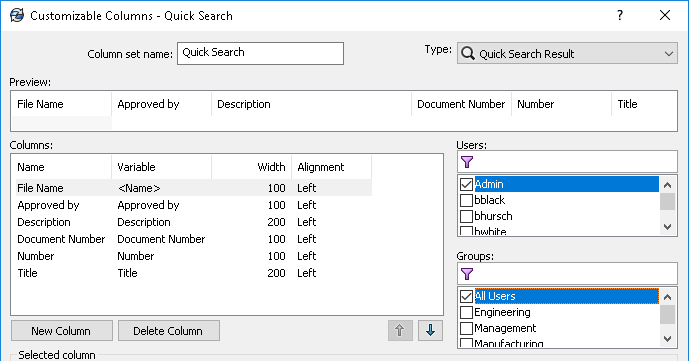
1. **Set Users Settings**
   1. In the Administration tool, right-click **Users** and select **Settings**.



* 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.  
      
   3. Click **OK** to save the permissions
   4. Expand the Columns node, then double-click Quick Search.
   5. Click the check box next to the Admin User and the All Users group.  
      
   6. 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.**