SOLIDWORKS®

SOLIDWORKS File Management

Dassault Systèmes SolidWorks Corporation
175 Wyman Street
Waltham, MA 02451 U.S.A.

© 1995-2024, Dassault Systemes SolidWorks Corporation, a Dassault Systèmes company, 175 Wyman Street, Waltham, Mass. 02451 USA. All Rights Reserved.

The information and the software discussed in this document are subject to change without notice and are not commitments by Dassault Systemes SolidWorks Corporation (DS SolidWorks).

No material may be reproduced or transmitted in any form or by any means, electronically or manually, for any purpose without the express written permission of DS SolidWorks.

The software discussed in this document is furnished under a license and may be used or copied only in accordance with the terms of the license. All warranties given by DS SolidWorks as to the software and documentation are set forth in the license agreement, and nothing stated in, or implied by, this document or its contents shall be considered or deemed a modification or amendment of any terms, including warranties, in the license agreement.

For a full list of the patents, trademarks, and third-party software contained in this release, please go to the Legal Notices in the SOLIDWORKS documentation.

Restricted Rights

This clause applies to all acquisitions of Dassault Systèmes Offerings by or for the United States federal government, or by any prime contractor or subcontractor (at any tier) under any contract, grant, cooperative agreement or other activity with the federal government. The software, documentation and any other technical data provided hereunder is commercial in nature and developed solely at private expense. The Software is delivered as "Commercial Computer Software" as defined in DFARS 252.227-7014 (June 1995) or as a "Commercial Item" as defined in FAR 2.101(a) and as such is provided with only such rights as are provided in Dassault Systèmes standard commercial end user license agreement. Technical data is provided with limited rights only as provided in DFAR 252.227-7015 (Nov. 1995) or FAR 52.227-14 (June 1987), whichever is applicable. The terms and conditions of the Dassault Systèmes standard commercial end user license agreement shall pertain to the United States government's use and disclosure of this software, and shall supersede any conflicting contractual terms and conditions. If the DS standard commercial license fails to meet the United States government's needs or is inconsistent in any respect with United States Federal law, the United States government agrees to return this software, unused, to DS. The following additional statement applies only to acquisitions governed by DFARS Subpart 227.4 (October 1988): "Restricted Rights - use, duplication and disclosure by the Government is subject to restrictions as set forth in subparagraph (c)(l)(ii) of the Rights in Technical Data and Computer Software clause at DFARS 252-227-7013 (Oct. 1988)."

In the event that you receive a request from any agency of the U.S. Government to provide Software with rights beyond those set forth above, you will notify DS SolidWorks of the scope of the request and DS SolidWorks will have five (5) business days to, in its sole discretion, accept or reject such request. Contractor/ Manufacturer: Dassault Systemes SolidWorks Corporation, 175 Wyman Street, Waltham, Massachusetts 02451 USA.

Document Number: PMT2509-ENG

Contents

Introduction

About This Course 2
Prerequisites 2
Course Design Philosophy 2
Using this Book 2
About the Training Files 3
Conventions Used in this Book 4
Windows 4
Use of Color 5
Color Schemes 5
More SOLIDWORKS Training Resources. 5
Local User Groups 5

Lesson 1: SOLIDWORKS File Structure

Understanding SOLIDWORKS Files 8
SOLIDWORKS File Structure 8
External References 8
File Associativity 8
SOLIDWORKS Files 8

Case Study: Reducing File Size 9
Methods for Reducing File Size 11
Suppress Features Method 11
The Block Method 12
Suppress Base Feature Method 13
Image Quality 13
Configurations 15
FeatureManager Design Tree 17
SOLIDWORKS File Types 18
Case Study: External References 19
File References 21
Object Linking and Embedding (OLE) 22
File Reference Example 22
Find References 23
List External References 23
File Names 24
Update Holders 24
Out of Context 24
SOLIDWORKS File Conversion 27
SOLIDWORKS Task Scheduler 29
Case Study: File Conversion 29
Opening Files 33
Computer Memory 33
Case Study: RAM Resident 33
Reload 36
Open Modes 38
Read-only 38
Case Study: Quick View 39
Case Study: Read-only 42
Read-only Recap 46
Exercise 1: File Conversion 47

Lesson 2: Saving Files

Saving Files 50
Save 50
Save As 50
Save All 50
Case Study: Save Options 51
Editing References 55
Automatic File Backup 59
Backup 59
Auto-recover 59
Notification 60

Case Study: Backup/Recover 60
File Properties 64
Classes of File Properties 65
Creating File Properties 65
Uses of File Properties 66
Property Tab Builder 68
Case Study: File Properties 68
Additional Data 73
Design Binder 73
Comments 74
Tags 74
Exercise 2: Change a Reference 75

Lesson 3: File References

External Reference Search Order 80
Reference Options 80
File Names 81
Case Study: Searching for References 82
Internal ID 83
Resolving Renamed Documents 89
Recursive Searches 95
Copying References 96
Using Save As to Copy References 98
Changing References 101
In-context Features 102
Case Study: In-context Features 102
Locking and Breaking References 106
SOLIDWORKS File Utilities 107
Windows Explorer/Task Pane Access 108
Case Study: SOLIDWORKS File Utilities 108
Renaming Files 109
FeatureManager Rename 111
Exercise 3: Change Document Names 112
Exercise 4: SOLIDWORKS File Utilities 116

Lesson 4: Shared Files

Working in a Collaborative Environment 120
Production Files 120
Read/Write Access 121
Updating Read-only Files 121
Open References Read-only 121
Case Study: Sharing Files 121
Reloading Files 123
Reload 126
Taking Write Access 127
Open Reference Files As Read-only 128
Make Read-only 129
Ancillary Files 131
Ancillary File Types 131
Specifying File Locations 134
Moving Ancillary Files 135
Separate Folders 135
What files should be shared? 135
Where should common files be stored? 136
Setting Shared File Locations 136
Forming Tools 136
Case Study: Shared File Locations 137
SOLIDWORKS Add-Ins 140
Toolbox 140
Master Part Files 140
Create Parts 140
Create Parts on Ctrl-Drag 140
Shared Master Parts 140
Shared Copies 140
Case Study: Toolbox Parts 141
Read-only Options in Toolbox 143
Toolbox Icon 145
Copy Parts 147
Exercise 5: Establish File Locations 150