

Enterprise PDM Administration 2010

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Length: 2 days

Prerequisites: Enterprise PDM End User (Using Enterprise PDM) course, basic experience with the Enterprise PDM software, Experience with the Windows™ operating system, and knowledge of Enterprise PDM file structure and referencing.

Description: The focus of this course is on the fundamental skills and concepts central to the successful use of Enterprise PDM. The intended audience for this course is anyone who will setup and/or administer Enterprise PDM.

Lesson 1: Installation Planning

Planning for Enterprise PDM
The Planning Process
Data Management Plan
Transition Plan
Training Scenario
The Installation Process

Lesson 2: The Administration Tool

Enterprise PDM Administration Tool
Creating a Enterprise PDM File Vault
Create a local file vault view
Setup Overview

Lesson 3: Users and Groups

Users
Case Study: Creating Users
Groups
Case Study: Create a New Group

Lesson 4: Creating and Modifying Cards

File & Folder Data Cards
Anatomy of a Data Card
Case Study: Design a Folder Data Card
Case Study: Design a File Data Card
Case Study: Design a Search Data Card

Lesson 5: Templates

Templates
Case Study: Folder Template
Case Study: File Template

Lesson 6: Column and Bill of Materials (BOM) Views

Columns
Case Study: Column
Bill Of Material

Lesson 7: Workflow

Workflows
Categories
Case: Create Categories
Case Study: Existing Workflow
Case Study: Create a New Workflow
Revisions
Case Study: Create New Revision Schemes
Case Study: Specifications Revision Scheme
Case Study: CAD Files Revision Scheme
Case Study: Sorting State

Lesson 8: Data Import/Export, Notifications and Tasks

Import & Export ERP Data
Case Study: Alias Set
Case Study: Export Rule
Case Study: Import Rule
Case Study: Assign Notifications
Case Study: Convert Task

Lesson 9: File Types and Settings

File Types
User Settings

Appendix A: Items Administration

Items