

TMS CADCentre

SOLIDWORKS®

Administrators Training for SOLIDWORKS Design with Cloud Services



3DEXPERIENCE

Contents

Introduction:

About This Course	2
Prerequisites	2
Course Length.....	2
Course Design Philosophy	2
Using this Book	2
More Training Resources	4

Lesson 1:

Introduction to Product Lifecycle Management

What is PLM?.....	6
Key Benefits of PLM	6
PDM vs PLM	7
PLM on 3DEXPERIENCE.....	8
Planning for PLM.....	8

Lesson 2:

Getting Started with the 3DEXPERIENCE Platform

About 3DEXPERIENCE	12
Terminology	12
Access your 3DEXPERIENCE platform	13
Activating Your Tenant	13
Logging In.....	19
Navigate the 3DEXPERIENCE Interface.....	20
Top Bar	20
Getting Help	21

The Platform Management Dashboard	23
My Platform Tab	23
First Steps as Administrator	24
Manage Members	24
Manage Roles	27
About Groups	32
Credits & Tokens	36
Platform Management Tabs	37
Security Tab	37
Communities Tab	38
Create and Manage Communities	38
Content Tab	42
Collaborative Spaces	42
3DDrive	45
Dashboards Tab	46
Vocabularies Tab	46
Legal Tab	46
Search Tab	46
Preferences Tab	46
Desktop Apps	47
Exercise 1: Identify Members	49
Exercise 2: Batch Invite Members	50
Exercise 3: Post in 3DSwym	51

Lesson 3:

Administration for Share and Markup

About Share and Markup	54
Configure Share and Markup	55
Share a File from SOLIDWORKS Design	58
About 3DDrive	61
Track Shared Files	62
About 3DPlay	63
Tips for Sharing Files	65
Exercise 4: Respond as Recipient	66

Lesson 4:**Administration for Store and Revise**

About Collaborative Spaces	70
Collaborative Spaces Control Center	71
Revision Sequences	75
Managing Duplicates	80
About Bookmark Folders	81
Index Mode and Database Mode	84
PLM features in Bookmark Editor	85
SOLIDWORKS Design Content on the Platform	86
Content Naming Rules	89
Off-line Mode for SOLIDWORKS Connected	90
Exercise 5: Create a Collaborative Space	93
Exercise 6: Revision Schema Discussion	94
Exercise 7: Save SOLIDWORKS Design Model and Create a Bookmark Folder	95

Lesson 5:**Administration for Manage and Control**

Platform Search Settings	98
Lifecycle Maturity	99
Changing Maturity	99
Configure Maturity Graphs	99
About Locks	103
About Dashboards	104
Predefined Dashboards	104
Custom Dashboards	104
Change Object Ownership or Location	108
Compare Object Structures	111
Deleting Objects	113
About Routes	117
Route Templates	117
Exercise 8: Validate Maturity Graph	126
Exercise 9: Validate a Route Template	128
Exercise 10: Create and Deploy a Dashboard	129

Lesson 6:**Optional Administration Tasks**

Add and Deploy Attributes	132
Map Attributes	134
Attribute Mapping Settings	135
Exercise 11: Validate Attribute Mappings	140