

SOLIDWORKS PDM – COMPLETE GUIDE TO CLIENT INSTALLATION

Table of Contents

Overview	2
Installing the PDM Clients.....	2
Installation for PDM Viewer and Contributor Clients	3
Installation for PDM CAD Editors.....	3
Creating the Local View	4
Troubleshooting: Checking Local User has Vault Attach Access	7
Troubleshooting: Client Connection to Server	8
Local View Display Settings	8
BOM Display Options	12
Map SOLIDWORKS Options to Point to PDM Client.....	14
Task Host Configuration	16

Table of Figures

Figure 1: PDM Standard Client Options	3
Figure 2: PDM Professional Client Options.....	4
Figure 3: View Setup.....	5
Figure 4: Select Server to Connect.....	5
Figure 5: Select Vault to Attach	6
Figure 6: Select Access Location of Local View	6
Figure 7: Archive Server Attach Access Settings.....	7
Figure 8: View Details	8
Figure 9: Arrange Metadata.....	8/9
Figure 10: Card Preview	9
Figure 11: Local View Display Option	10
Figure 12: @Tab Property Manger.....	10
Figure 13: Mapping of Configuration Specific Properties.....	11

Figure 14: eDrawings Preview Options	11
Figure 15: Activate a Computed BOM	12
Figure 16: Display > Show Bill of Materials	12
Figure 17: Activated BOM View	13
Figure 18: Bill of Materials Permissions	13
Figure 19: Map Document Templates	14
Figure 20: Map Design Library	15
Figure 21: Map Toolbox and PDM	15
Figure 22: Map PDM Templates to SOLIDWORKS.....	16

Overview

Congratulations on completing your PDM Standard Jumpstart, or PDM Professional services here with GoEngineer! Please keep this documentation with you to help install the remaining PDM clients and configure all the additional components. There are 5 main steps to fully set up a PDM client machine:

1. Install the PDM client or modify SOLIDWORKS to add in the PDM client
2. Create a local view to see vault files on your local machine
3. Configure local view display settings
4. Map the SOLIDWORKS file locations to the vault
5. Configure task host configuration if your workflow uses a Task Add-in.

Throughout this document are links that lead to additional information on that topic. That information is valuable; this document serves to help organize that information in a logical and consistent manner without the need to redo the existing content.

Installing the PDM Clients

Whether installing the PDM client as a PDM Viewer, a PDM Contributor, or a PDM SOLIDWORKS CAD Editor (manage PDM CAD data inside of SOLIDWORKS), it requires installation media for SOLIDWORKS. More information on the different PDM license types for PDM Professional and PDM Standard can be found [here](#). If you are in need of SOLIDWORKS installation media, you can download it from our website [here](#). If you are modifying an existing installation, make sure that the local machine is pointed to the location of the installation media.

Installation for PDM Viewer and Contributor Clients

PDM Viewer and Contributor licenses do not require the local machine to have SOLIDWORKS installed. GoEngineer has step-by-step instructions on how to install these license types on a local machine that doesn't have SOLIDWORKS installed by clicking the link [here](#).

Installation for PDM CAD Editors

If you currently have SOLIDWORKS installed and wish to add on the PDM component, click the link [here](#). On the last step to change the PDM options, select the PDM Client options and be sure you choose the PDM product that corresponds with your implementation.

For example, if you have PDM Standard, you are installing for a PDM CAD Editor license, and you only want SOLIDWORKS for PDM integration, select the boxes below:

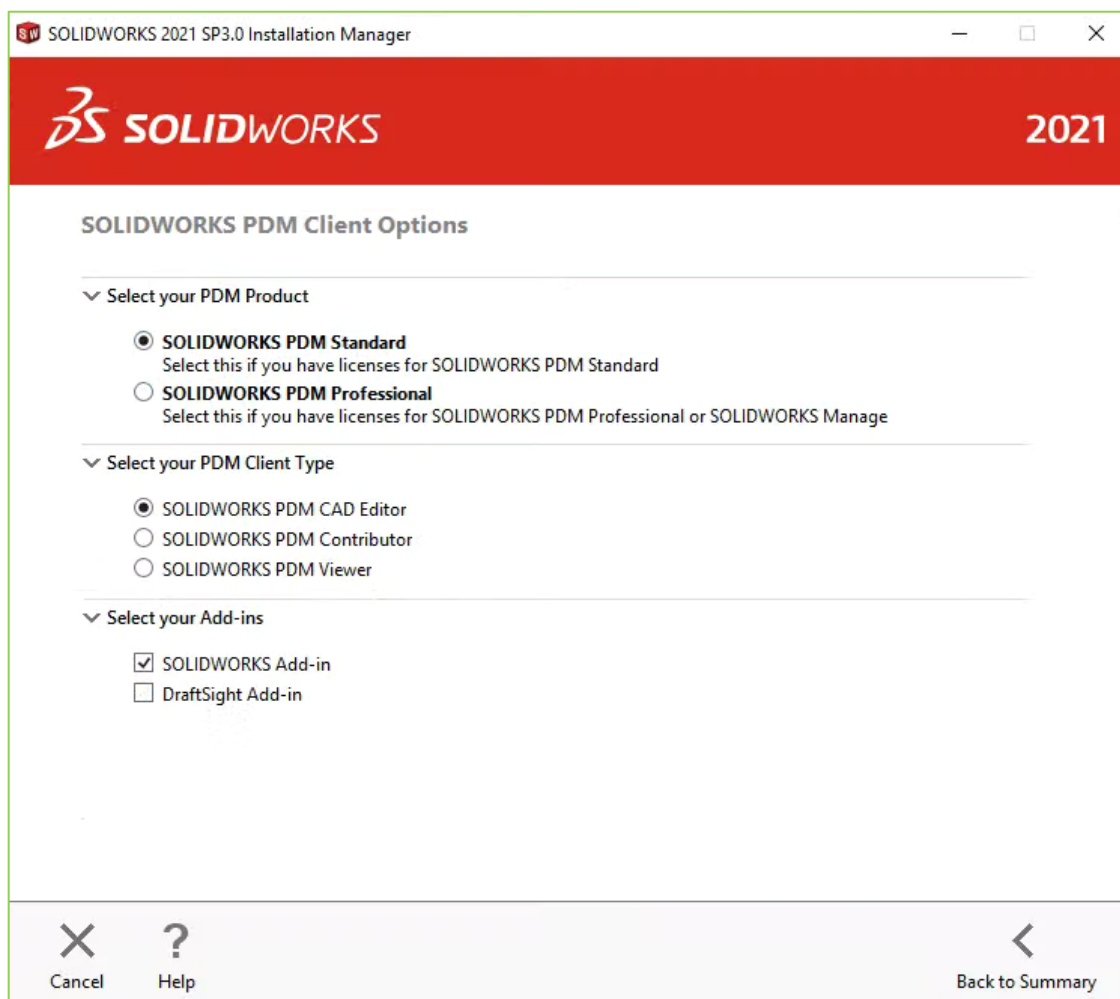


Figure 1: PDM Standard Client Options

If you have DraftSight and would like to manage the DraftSight CAD data in PDM within DraftSight, select the DraftSight Add-in as well.

In the below example for PDM Professional, a PDM CAD Editor and integration to SOLIDWORKS and Microsoft Office, the user would select the boxes below:

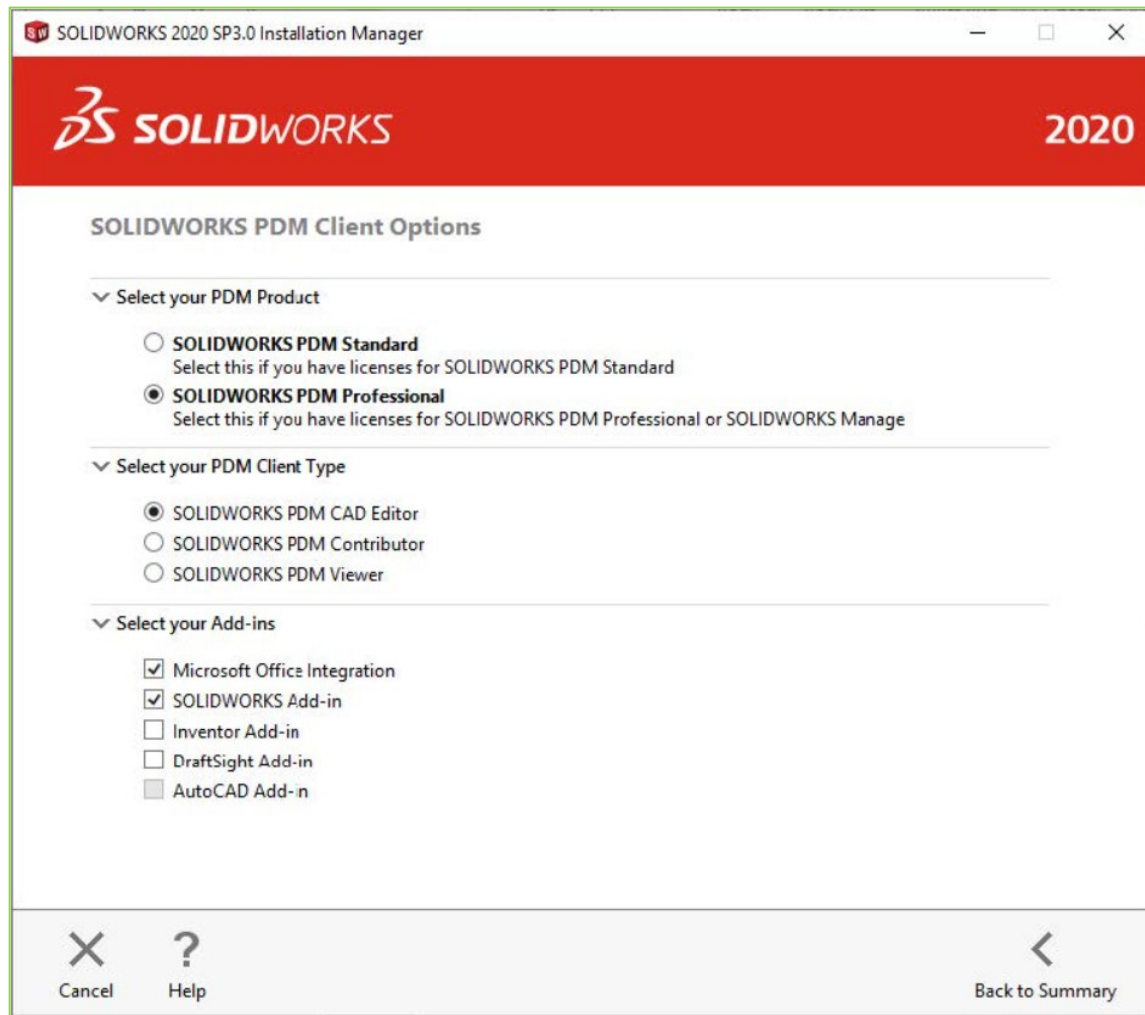


Figure 2: PDM Professional Client Options

Creating the Local View

When logging into the client computer in which you are installing the PDM Client, make sure to log in to a user account within the Windows domain or a domain included in the Archive Server Configuration on the PDM Server. More information on troubleshooting local view attachment can be found in the *Troubleshooting: Checking Local User has Vault Attach Access* section below.

There are a few ways to create the local view for the PDM Vault. One of the easiest ways is to use the View Setup tool. On the Windows taskbar, press **Start** → and search for **View Setup**.

When the welcome screen appears press **Next**.

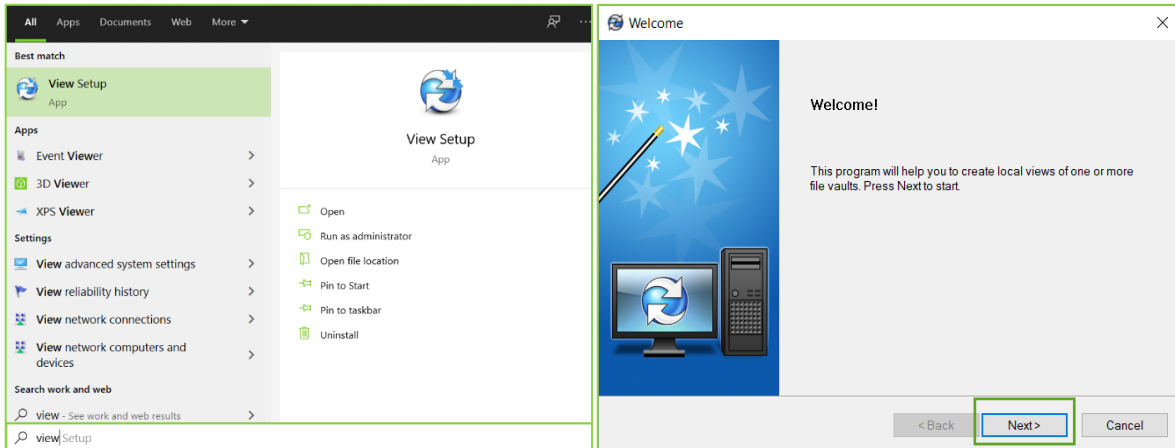


Figure 3: View Setup

Select the box for the server to connect to and press **Next**.

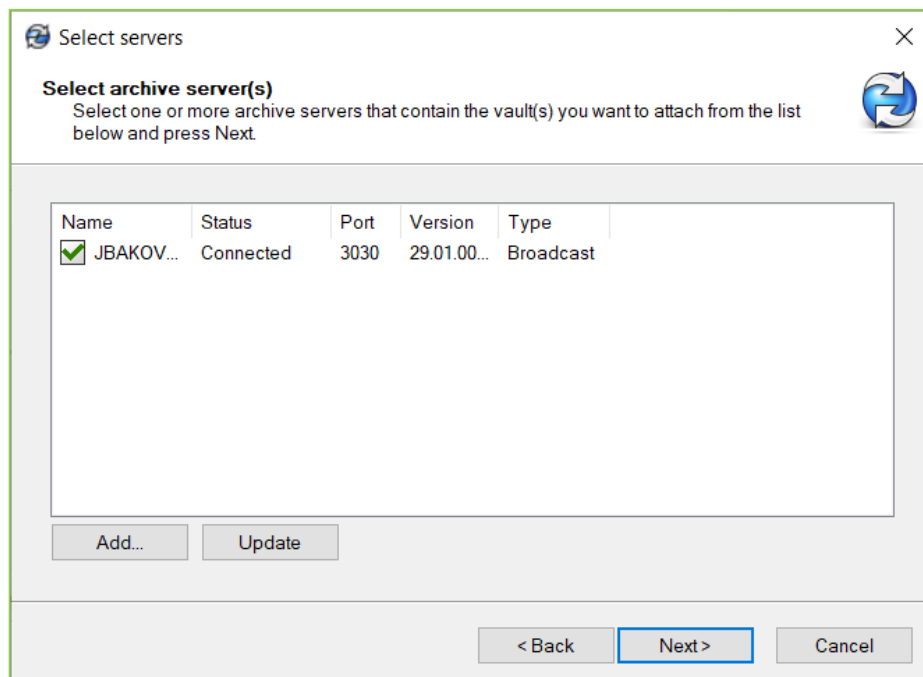


Figure 4: Select Server to Connect

Then choose what database to connect to the local view to. In my case, I have some attached and some that are not. Most likely, you will have only one vault to connect to. Simply check the box to choose the database and press **Next** when finished.

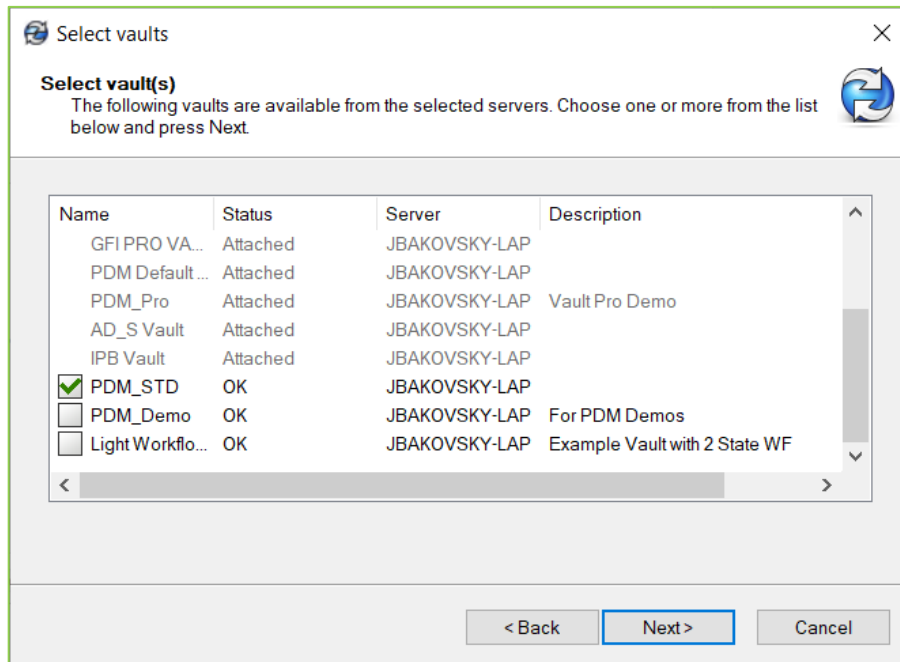


Figure 5: Select Vault to Attach

The next screen will ask where you would like the local view to be installed. For attach location, it is best to choose the C:\ root folder, or the root folder of another local drive so that the subdirectories within the vault do not exceed the windows 256-character limit in the file explorer address bar. Placing the local view at the root level folder also makes it easier for users to log in. Then, in the attach type, select whether you want the local PDM view to be accessible by all local logins or just the current user login.

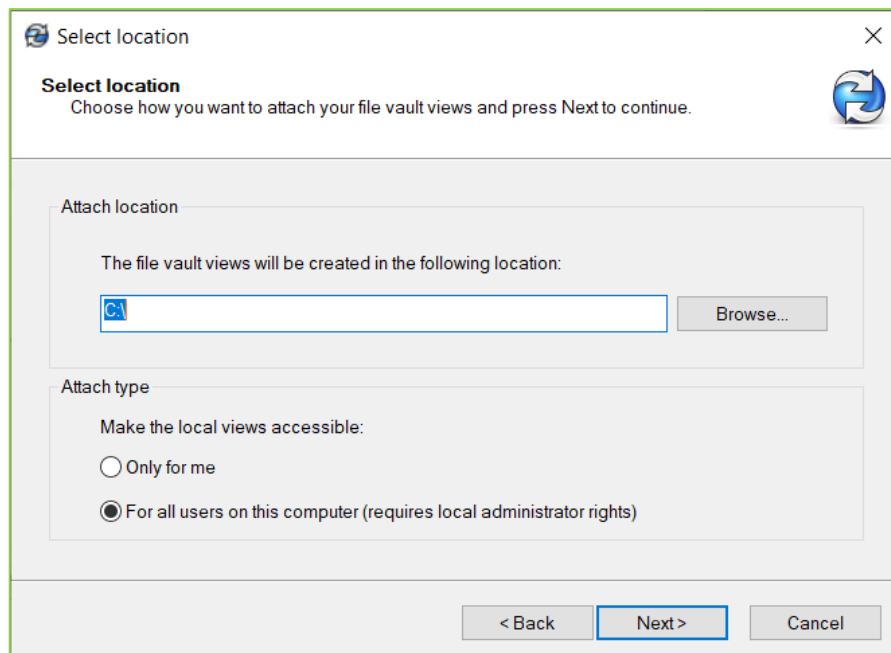


Figure 6: Select Access Location of Local View

Press **Next** to review and complete the local view installation. More detailed information on deleting and creating local views can be found [here](#).

Troubleshooting: Checking Local User has Vault Attach Access

If in the process of connecting the local view and you are unsure if the user account can attach a local view, or are having difficulty connecting, check the Archive Server Configuration on the PDM server to see if you are using a local user login within the local windows domain defined in the settings of the Archive Server. If any of these terms are unfamiliar to you, please contact our tech team at GoEngineer and your IT professional.

To see the archiver server settings, navigate to the server machine, press **Start** → search for PDM Archive Server. Once the tool is open, press **Tools** → **Default Settings** → and press the **Security** tab as shown below in Figure 7.

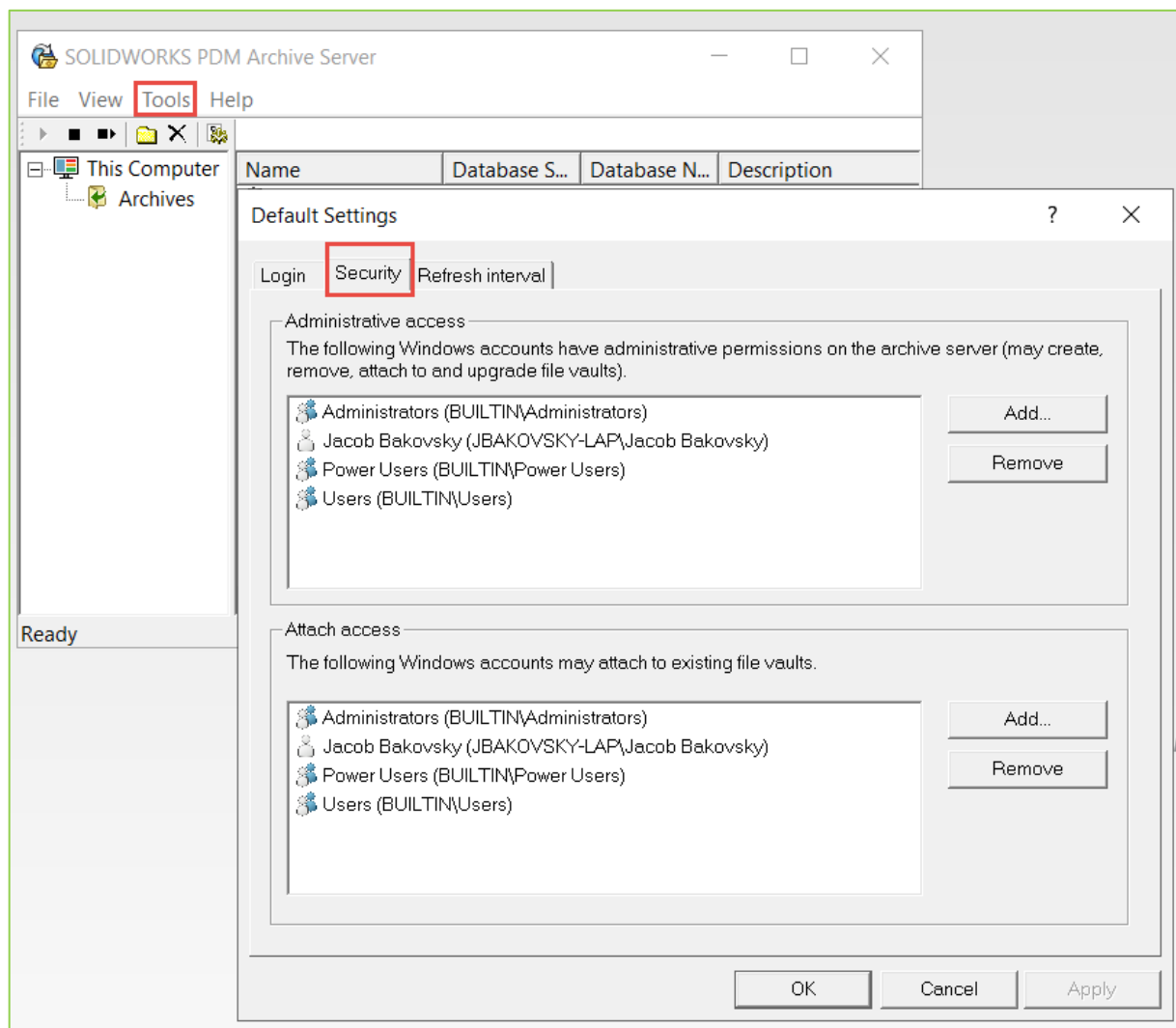


Figure 7: Archive Server Attach Access Settings

Troubleshooting: Client Connection to Server

Please make sure the client machine has a connection to the server. If you are accessing PDM on a client machine that is not on the LAN, please ensure that your VPN is turned on and connected to the WAN. If you are experiencing any issues connecting to the vault, see our comprehensive blog [here](#).

Local View Display Settings

Once the local view is set up there are a few options you might want to change to make the user interface inside of file explorer easier to manage. It's important to arrange the display in the windows file explorer to easily see the columns and metadata. The first time logging into the vault, the default view may be something other than the metadata **Details**. Once you first log in to the vault view, right mouse click in the blank space in the file explorer, then select **View** → **Details** as shown below in Figure 8.

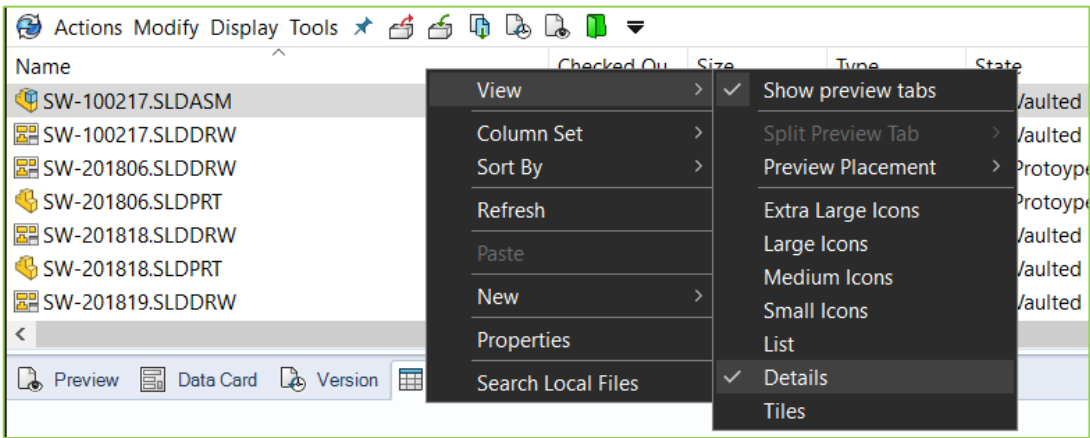


Figure 8: View Details

Then drag the columns so the data is organized in the order you wish. Here is an example in Figure 9 below:

Name	Checked Ou...	Size	Type	State	Date Modif...	Checked Ou...	Number	Description	Project
SW-100217.SLDASM		1,454 KB	SOLIDWOR...	Vaulted	08/27/20 1...		100217	BASE, GOENGINEE...	Miter S
SW-100217.SLDDRW		453 KB	SOLIDWOR...	Vaulted	08/27/20 1...		100217	BASE, GOENGINEE...	Miter S
SW-201806.SLDDRW		146 KB	SOLIDWOR...	Prototype WIP	04/21/21 1...		201806	RAIL, GUIDE	Miter S
SW-201806.SLDPRT	Jacob	62 KB	SOLIDWOR...	Prototype WIP	04/21/21 1...	<JBAKOV...	SW-201806	RAIL, GUIDE	Miter S
SW-201818.SLDDRW	Admin	154 KB	SOLIDWOR...	Vaulted	04/21/21 1...	<JBAKOV...	201818	EXTENSION STAN...	Miter S
SW-201818.SLDPRT	Admin	502 KB	SOLIDWOR...	Vaulted	04/21/21 1...	<JBAKOV...	201818	EXTENSION STAN...	Miter S
SW-201819.SLDDRW		288 KB	SOLIDWOR...	Vaulted	08/27/20 1...		201819	EXTENSION STAN...	Miter S



Name	Number	Description	Project Na...	Version ...	Revision	State	Checked Ou...	Size	Type
SW-100217.SLDASM	100217	BASE, GOENGINEE...	Miter Saw, ...	1/1	C	Vaulted		1,454 KB	SOLIDWOR...
SW-100217.SLDDRW	100217	BASE, GOENGINEE...	Miter Saw	1/1	C	Vaulted		453 KB	SOLIDWOR...
SW-201806.SLDDRW	201806	RAIL, GUIDE	Miter Saw	2/2	X01	Prototype WIP		146 KB	SOLIDWOR...
SW-201806.SLDPRT	SW-201806	RAIL, GUIDE	Miter Saw, ...	-/2	X01	Prototype WIP	Jacob	62 KB	SOLIDWOR...
SW-201818.SLDDRW	201818	EXTENSION STAN...	Miter Saw	-/1	A	Vaulted	Admin	154 KB	SOLIDWOR...
SW-201818.SLDPRT	201818	EXTENSION STAN...	Miter Saw, ...	-/1	B	Vaulted	Admin	502 KB	SOLIDWOR...
SW-201819.SLDDRW	201819	EXTENSION STAN...	Miter Saw	1/1	A	Vaulted		288 KB	SOLIDWOR...

Figure 9: Arrange Metadata

Next, I will show some display settings that I prefer on my machine. I first go to **Display** → and uncheck **Card Preview** as shown in Figure 10. This option allows for more room for the eDrawings preview in the Preview tab in the file explorer local view.

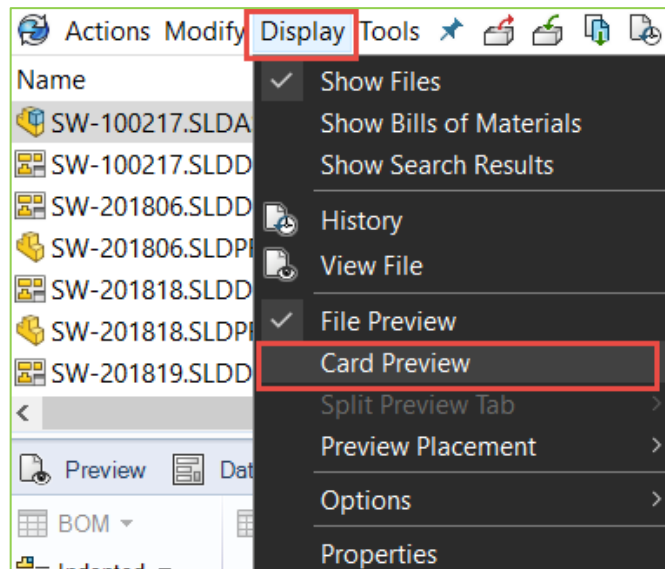


Figure 10: Card Preview

Regarding the eDrawings preview, there are a few options within the **Display** → **Options** that I prefer. My personal preference is to use the options shown below in Figure 11.

I uncheck the simulation results in check in because the Simulation (SIM) result files must go into a workflow if you want them in the vault, otherwise, they remain local files only. It gets messy, the files can get very huge, and the eventual storage requirements for multiple versions of SIM results can fill up the Archive server. We discourage customers from storing SIM result files in the vault. We encourage customers to vault the SIM reports. We have a helpful article that explains Simulation results and PDM for more information that can be found [here](#).

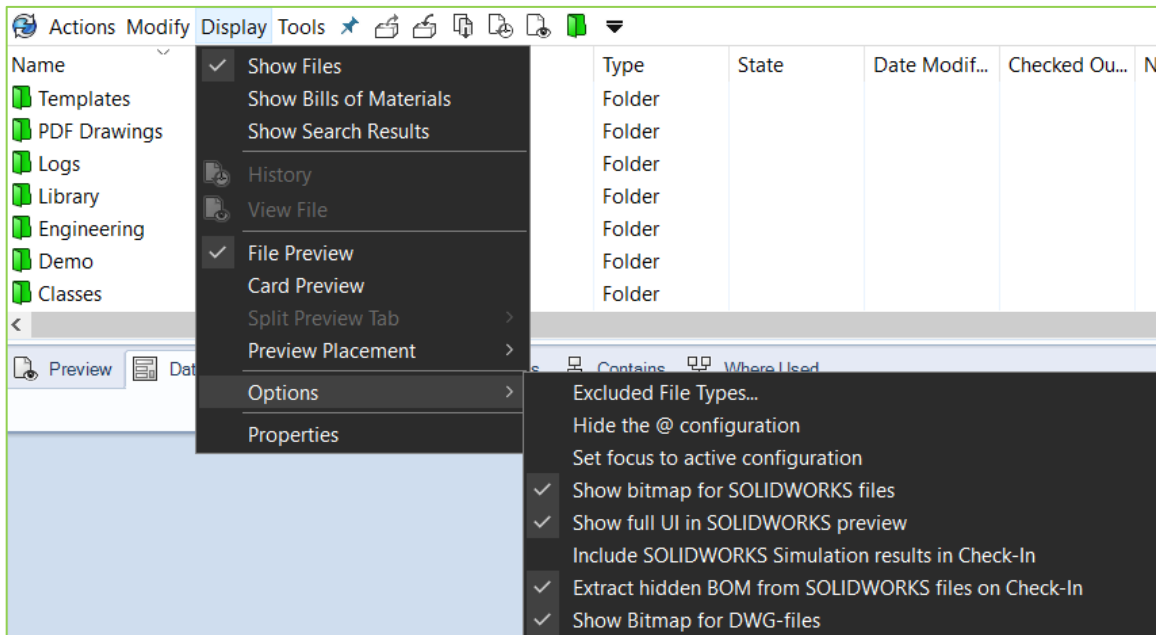


Figure 11: Local View Display Option

Within the SOLIDWORKS properties, there are two major tabs: Custom and Configuration Specific. The Configuration Specific properties will always take precedence over the custom properties. In SOLIDWORKS PDM, the @ tab is the same as Custom Properties in SOLIDWORKS as shown in Figure 12.

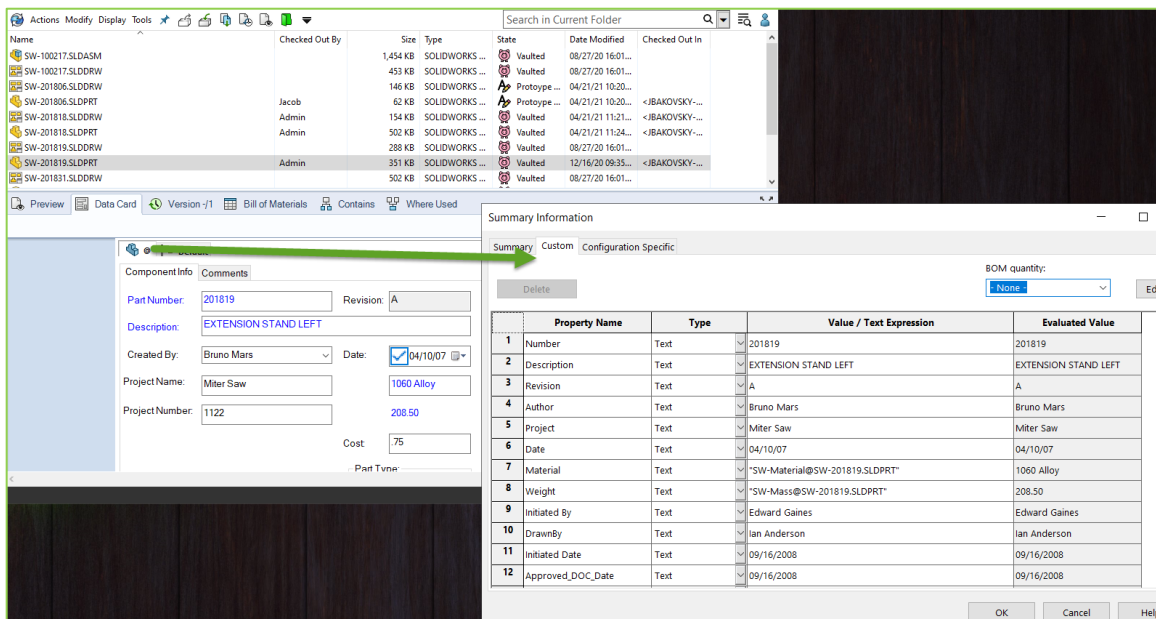


Figure 12: @Tab Property Manager

In my vault, I do not hide the @ tab, as myself and most customers only work with their file properties and not the configuration-specific properties. We discourage customers from using configurations for different part numbers when working with PDM because you cannot independently revise or workflow a configuration.

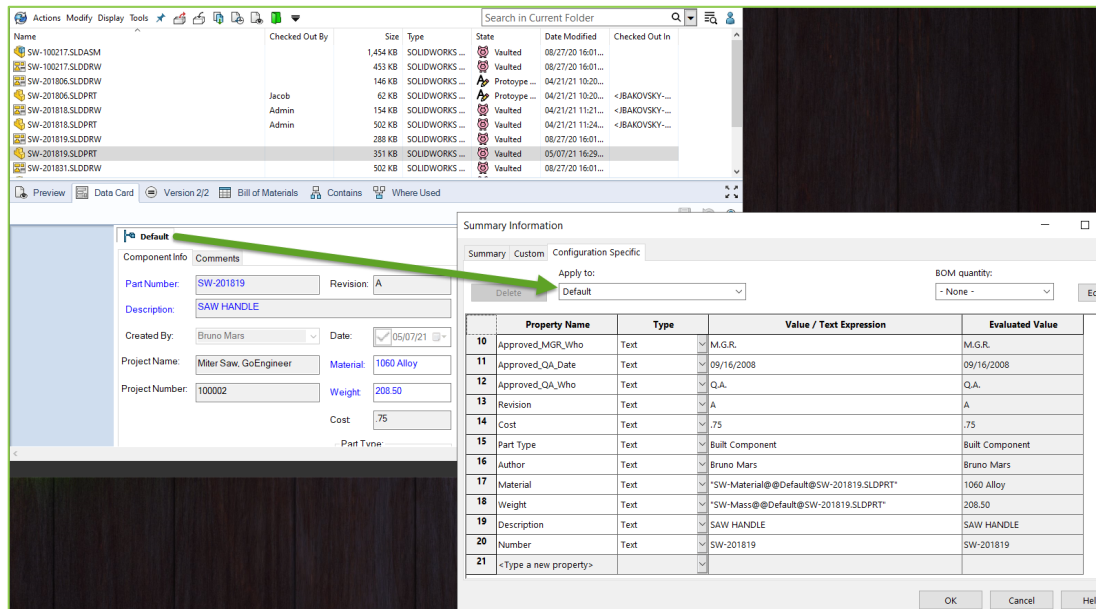


Figure 13: Mapping of Configuration Specific Properties

The display option to show the bitmap for SOLIDWORKS files will allow the file explorer to run faster. With this option checked and with the preview tab open, a bitmap image appears of the CAD model instead of loading it in eDrawings with each click. Furthermore, the **Show full UI in SOLIDWORKS Preview** allows for a menu bar in the eDrawings preview to move, rotate, measure, markup, change views, etc. more easily.

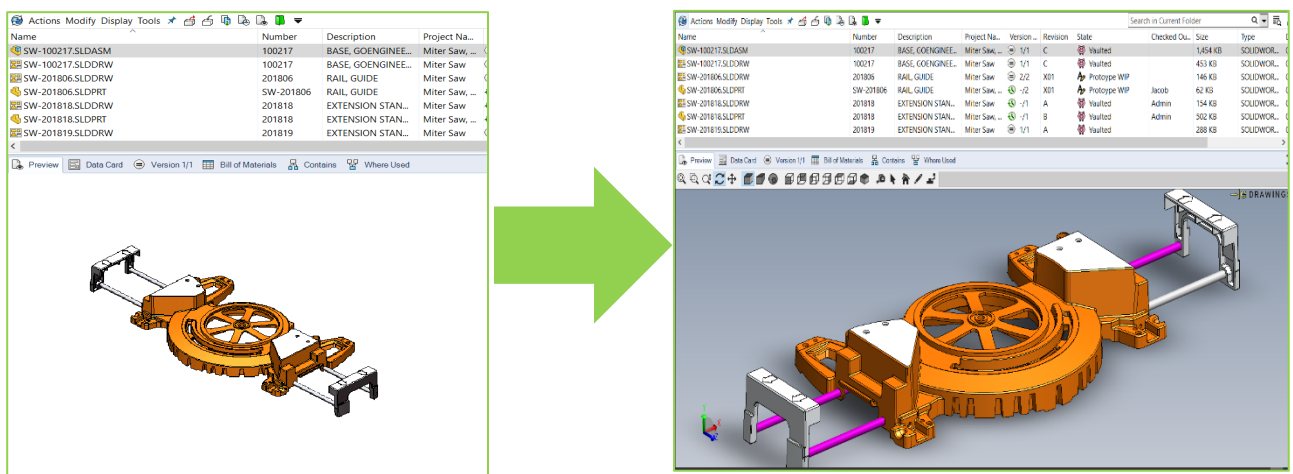


Figure 14: eDrawings Preview Options

BOM Display Options

It's possible in PDM to use this same **Display** to view activated bills of material. First, press an assembly in the file explorer, then press the **Bill of Materials** tab and select to activate the BOM as shown below:

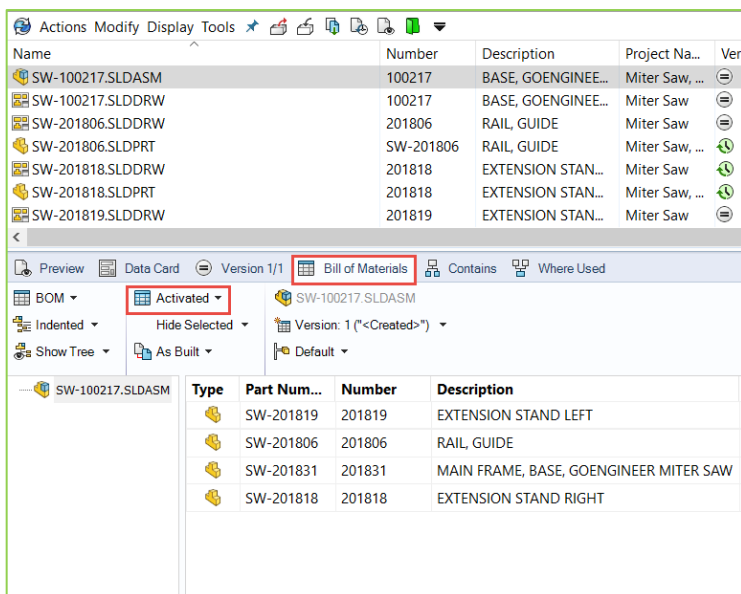


Figure 15: Activate a Computed BOM

Note: All display options shown here are merely suggestions to serve as a guide for the display options on your PDM client.

Then Select **Display** → **Show Bill of Materials** (Figure 16) and the activated BOM(s) will be the only thing filtered in the file view as shown below in Figure 17.

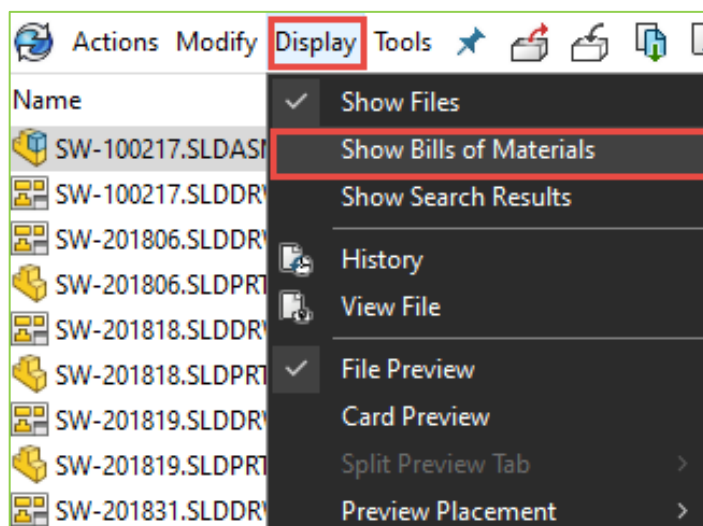


Figure 16: Display > Show Bills of Materials

Actions

Modify

Display

Tools

Name	Checked out by	File	State	Configuration
BOM		SW-100217.SLDASM		Default

BOM ▾

Indented ▾

Show Tree ▾

Activated ▾

Hide Selected ▾

As Built ▾

SW-100217.SLDASM

Version: 1 ("<Created>") ▾

Default ▾

<div> SW-100217.SLDASM</div>	Type	Part Num...	Number	Description	Qty
		SW-201819	201819	EXTENSION STAND LEFT	1
		SW-201806	201806	RAIL, GUIDE	4
		SW-201831	201831	MAIN FRAME, BASE, GOENGINEER MITER SAW	1
		SW-201818	201818	EXTENSION STAND RIGHT	1

Figure 17: Activated BOM View

This will only work if the PDM user or group permission on the PDM Administration tool is set to **Activate** and if **See a Computed BOM** in the **Bills of Materials** section in the PDM Administration tool as shown below in Figure 18.

Engineering - Properties			
<div> <div> <div>Engineering</div> <div>General Properties</div> <div>Group Members</div> <div>Administrative Permissions</div> <div>Folder Permissions</div> <div>State Permissions</div> <div>Transition Permissions</div> <div>Search Cards</div> <div>Bills of Materials</div> <div>Columns</div> <div>Warnings</div> <div>Cache Options</div> <div>Copy Tree</div> </div> </div>	Bill of Materials - BOM		
		Activate computed BOM	See computed BOM
	BOM	✓	✓
	Weldment BOM	✓	✓

Figure 18: Bill of Materials Permissions

These are just my settings for display in the local view. All of the display options shown here are merely suggestions to serve as a guide for the display options on your PDM client. A more detailed look at local view options can be found in our more comprehensive document [here](#).

Map SOLIDWORKS Options to Point to PDM Client

For PDM CAD Editor licenses, it is important to map the options in SOLIDWORKS to locations in PDM to utilize the full automation.

Launch SOLIDWORKS on the local machine, navigate to **Tools** → **Options** → **File Locations** → **Document Templates** and add the location in the local view where your standardized templates are located as shown in Figure 19 below.

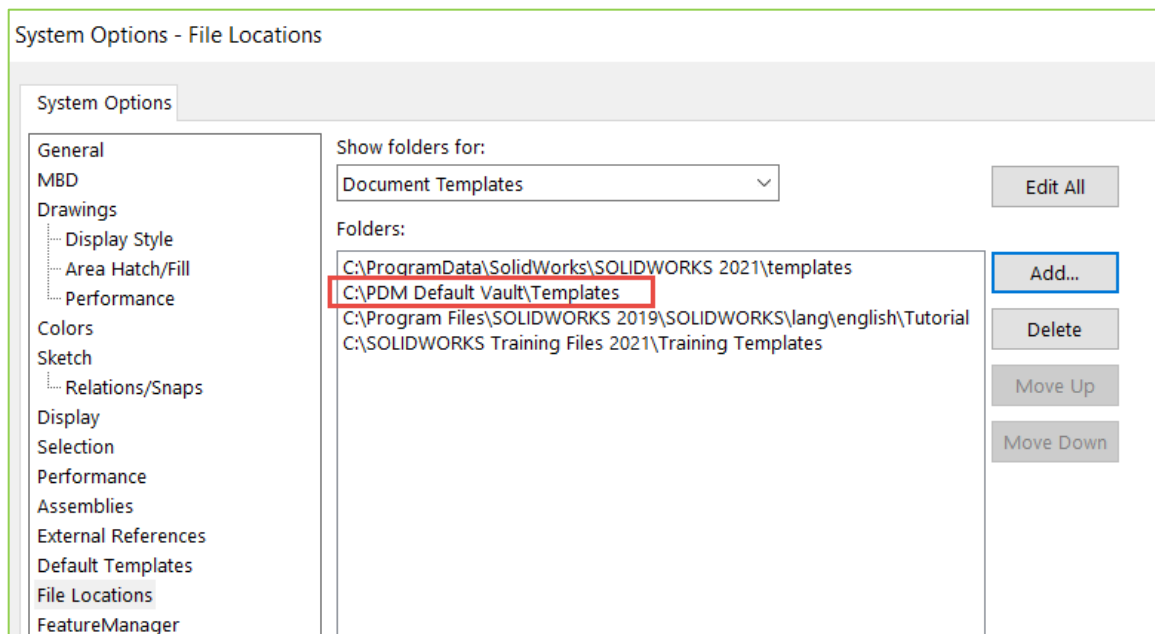


Figure 19: Map Document Templates

Do the same thing if you would like to map a centralized location for design library parts. In Figure 20 below, I am adding the location of my library components to the Library Folder in my PDM Default Vault.

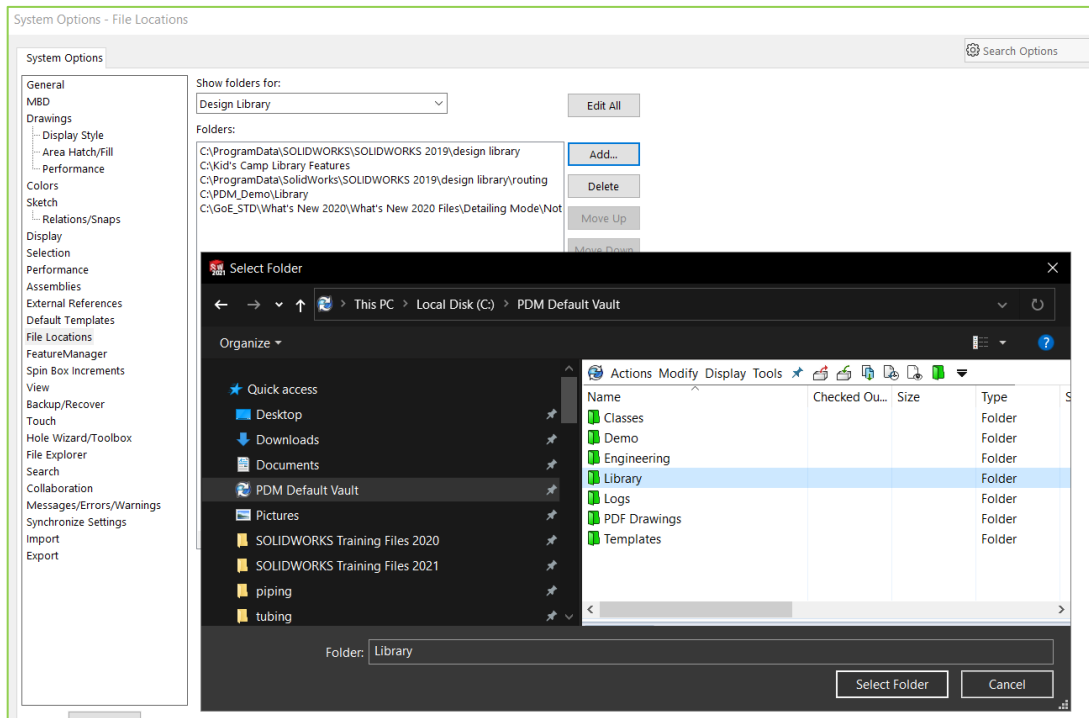


Figure 20: Map Design Library

If you are managing the SOLIDWORKS Toolbox in PDM as a centralized location for all similar hardware, map the Toolbox location as well. In the SOLIDWORKS options, select the Hole Wizard/Toolbox and change the location to map to the location in PDM in Figure 21.

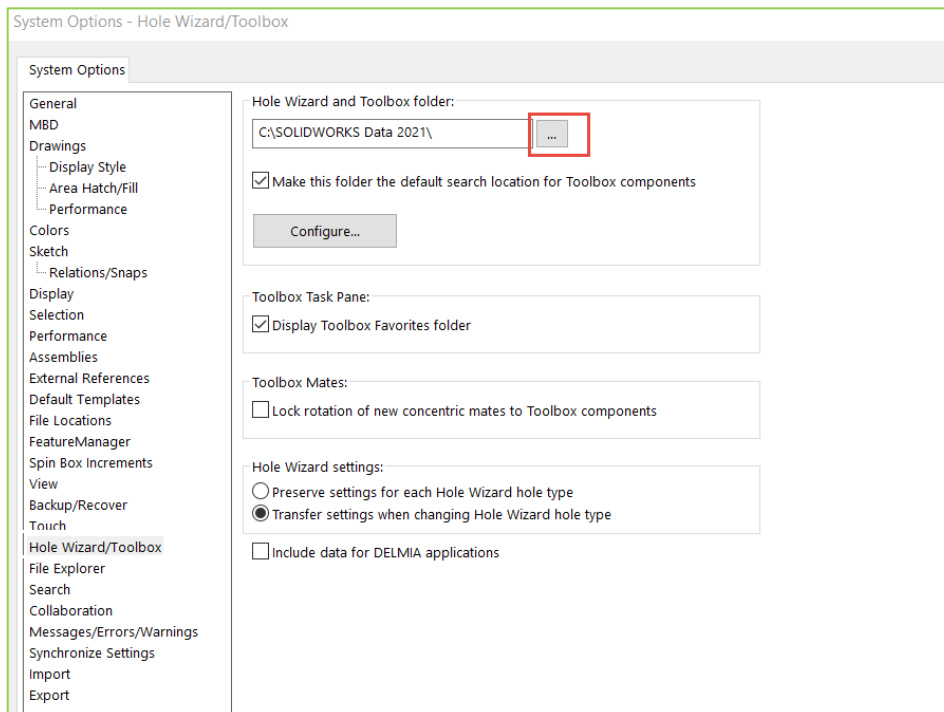


Figure 21: Map Toolbox and PDM

A more detailed overview for using Toolbox and PDM, including important administrator cache options, can be found [here](#). In fact, any **Library** in the PDM vault should refresh the cache during login as shown in Figure 22 below.

Press **OK** on the options to solidify the changes and press **Yes** on the permissions boxes that subsequently appear.

Then, after you hit okay and close the options, go back into the SOLIDWORKS options one more time, press **Default Templates**, and select each three-dot menu button, highlighted in Figure 22 below, to map the appropriate corresponding template from the PDM vault. A great way to ensure users always utilize the templates from PDM is to select the option to **Always use the default document templates**.

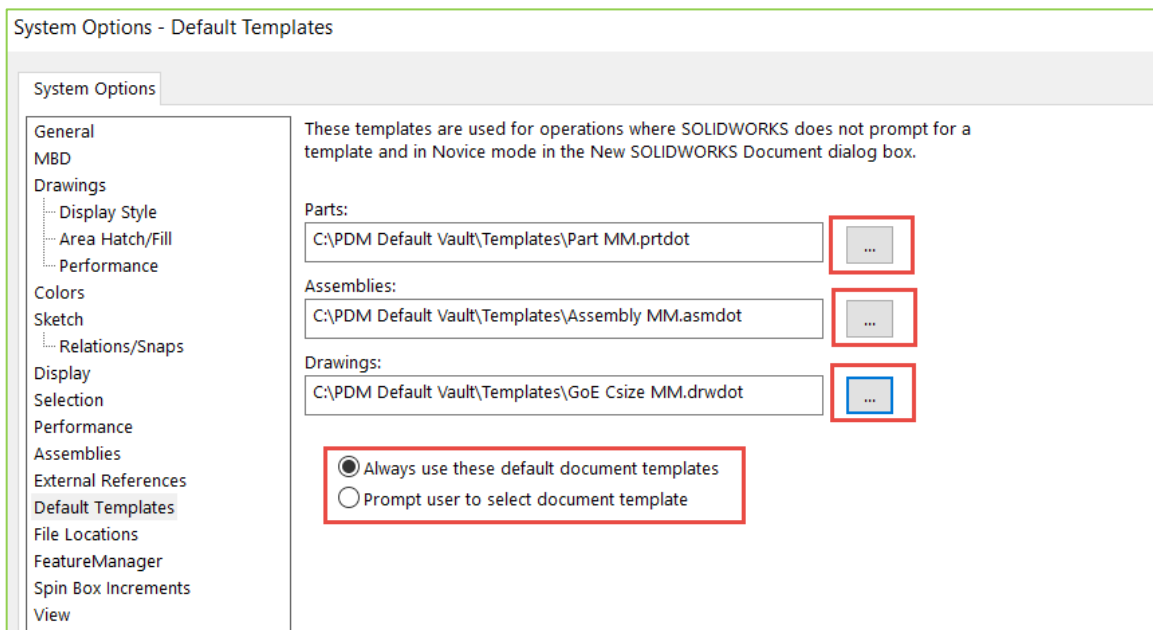


Figure 22: Map PDM Templates to SOLIDWORKS

Task Host Configuration

Task host configuration is an essential step for PDM configurations with add-in tasks or custom add-in tasks. Without task host enabled, the custom add-ins will not work on the local machine. For those with PDM Standard, this step is necessary if you have automatic PDF generation in your workflow.

We recommend logging into the vault as an Admin, but you can log in as a user who has permissions for **Task Host Configuration** within the PDM administration tool. GoEngineer has a

helpful document with prerequisites for configuring tasks host [here](#). In addition, we have detailed instructions for how to configure the task host in our documentation [here](#).