SolidWorks Enterprise PDM – 6 Steps for Implementation

We all know the benefits of using SolidWorks Enterprise PDM (managing multiple design teams, automating internal processes, improving collaboration as well as communication in your organization), but how is SolidWorks Enterprise PDM (EPDM) actually brought into our company? GoEngineer has a clear, concise 6 step implementation process to get our customers up and running in a timely fashion.

1. **Installation**: Either the customer or GoEngineer can perform the installation of the SQL Server, EPDM Server and clients. The software is available for download online in the SolidWorks Customer Portal or from physical media.

2. **Admin Training**: Training is done by GoEngineer for the PDM Administrators (3 days) at the beginning of implementation process. One of the main goals is to provide the customer with a common vocabulary so that we can discuss the software configuration in the next step. The course also provides great exposure to all the capabilities of the system. After mastering the course material, EPDM Administrators should have enough insight to make educated decisions about the system.
3. **Configuration:** This phase starts with a business process workshop. The customer walks GoEngineer through their document process. This includes approval and revision schemes. Following that session, the GoEngineer Implementation Team maps out how EPDM will function in the customer’s unique environment. Following the mapping, the customer’s system is configured to meet those requirements.

4. **Data Migration:** Now that the infrastructure is set up, most customers like to pre-populate their vault with any existing data. While it may be possible to simply copy and paste your existing data into EPDM, one must also consider setting the workflow states, incrementing the revisions to match existing values, and pre load any other custom property values. Special care must be taken when data is coming from multiple sources (like when data is scattered across network shares and user desktops), or when coming from a different database or management system, such as Workgroup PDM. GoEngineer has several tools at our disposal to automate much of this process, and many customers choose to contract GoEngineer to evaluate and assist with their data migration needs.

5. **Customization:** EPDM is a highly customizable software package out of the box. A great majority of the time, the software can cater to the full spectrum of customer requirements. In the event that additional capabilities are required, GoEngineer can be contracted to write Add-Ins for EPDM in an effort to deliver the best possible solution to its customers.

6. **End User Training:** Before the system goes live, End Users need to be trained on how to interface with the EPDM Vault as clients. The customer usually handles this task internally. Upon completion of the CAD Administrator course, attendees should be able to create this additional documentation. GoEngineer can provide soft documentation that can be used as a template. SolidProfessor, a GoEngineer Solution Partner, offers web based training for End Users. Finally, GoEngineer can provide client training at its local office or onsite at the customer.

Once these 6 steps have been completed, the customer is ready to Go Live with EPDM. Go Live means that all the data and users are on board and the implementation process is complete.