

# PDMWORKS ENTERPRISE IMPLEMENTATION



*PDMWorks® Enterprise is product data management (PDM) software that helps organizations manage and share their product data more effectively to create better products in less time. DesignPoint's own expertise and that of their partners, PDMWorks Enterprise can be deployed in a fraction of the time required by other enterprise PDM systems. Details of a typical implementation follow.*



## **Description of Services**

### **PDMWE Site Assessment**

This task will consist of assessing the current business needs and requirements of the client to determine how to best implement PDMWE. Topics to be reviewed:

- Part Number Scheme
- Revision Scheme
- Property Mapping between SolidWorks and PDMWE
- Workflow/Release process
- Folder Structure
- Data Card Attributes
- Permissions
- Web Access
- Specialized needs which require customization/programming

### **PDMWE Software Installation**

This task will consist of installing the PDMWE Server side software, the SQL database and two PDMWE clients. Unless otherwise instructed by the client, its assumed that the client will be responsible for installing any remaining PDMWE Clients.

#### **CONTACT:**

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### **PDMWE Core Team Training**

This task will consist of performing training for the "Core" team. The core team will normally consist of the stakeholders of the project (i.e., IT and PDMWE administrative personnel). Core team training covers basic user training and the PDMWE Admin in an informal setting. Topics to be reviewed will include:

- Review of Software Install procedures
- Part Number Scheme
- Revision Scheme
- Property Mapping between SolidWorks and PDMWE
- Workflow/Release process
- Folder Structure
- Data Card Attributes
- Permissions
- Directory Structure
- Check In and Check Out
- Release

### **Configure the PDMWE System**

Per the data gathered in the assessment process the following functionalities will be configured for the PDMWE environment:

- File & Folder Data Cards
- Data Card Variables
- Project Folder Templates

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- Template Input Forms
- Lists
- File Templates
- Card Lists
- Users, Groups & Permissions

In addition, time will be spent to hash out any additional details regarding the Workflow/Release process. Upon agreement on the process time will be spent to implement the process in the system and test and validate the process.



## End User Training Support

Its recommended that the client's PDMWE administrator provide the end user training to its users. This one day effort covers a "train the trainer" scenario where the PDMWE admin will be trained in the fundamentals of the end user functionality in order to instruct their users in these topics themselves. Topics include:

- PDMWE User Interface
- Check Out and Check In of Data
- File Versioning
- Searching PDMWE
- Release data (workflow processes)

Note this training will be based on the standard PDMWE training material. If the client requires the development of custom training material more time will be required. Also, if the client prefers all end user training to be performed by the Supplier more time will be required.

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## Production Roll Out and Support

We support the effort involved to launch the PDMWE implementation in the production environment.

## Other Topics

PDMWE implementations may require additional effort than what is described above including Data Loading, Programming of Customizations, Replication of Data, etc. Further effort required to perform these tasks will be quoted as additional days.

## **Pricing and Terms**

### Services

Pricing is based on a time and materials - please request a quote from your Account Manager.

### Travel and Living Expenses

The price for Services does not include travel and living expenses. Travel and Living expenses shall be calculated in accordance with US Federal Government GSA guidelines.

