



moovapps  
**myPDMtools**

*Tools catalog*



# MyPDMtools utilities

Simplify your work and increase the power of your PDM with more than 20 tools built into SOLIDWORKS PDM PROFESSIONAL

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## DynamicList

Use linked drop-down lists in the data map

DynamicList allows you to enhance your PDM data cards with linked choice lists.

The data source can be an Excel file, a csv file or a query in a database.

Document Information | Designation | Comments

**Sample DynamicList**

Family Code: K07

Designation EN: PNEUMATIC CENTRER

Designation DE: PNEUM, ZENTRIERER

Designation FR: CENTREUR PNEUMATIQUE .

Finaly Code: K07010

Set Family Code

List of group: Training CSV

Family: K07

English designation: PNEUMATIC CENTRER

German designation: PNEUM, ZENTRIERER

French designation: CENTREUR PNEUMATIQUE .

Code: K07010

OK Cancel

## Project management



### Key features

- Data that drives drop-down menus :
  - Text file
  - Excel or CSV file or each column corresponds to a level
  - SQL request
- Multiple selections for the latest drop-down menu

### Key differences with PDM

Create smart choice lists to fill in data cards



### Value your data cards

With DynamicList, you can easily and without any risk retrieve information from your ERP and fill in your data cards.



# SerialNumbers

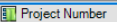
Create unique serial numbers per project by combining variables with a counter

SerialNumbers allows you to value a variable of the card automatically by archiving documents with a counter number and card variables.

It automatically creates counters by project or type of document.

Definition of serial number

Name: Training\_SerialNumber

Value:  Project Number - Desc - Project +

Variable: SerialNumber

Document Information Designation Comments

Doc Number: 01 Revision:

Description: SerialNumber-Gear

Project Number: 2018-11

Project Name: SerialNumber

Article code: 2018-11-SerialNumber-Gear-01

**myPDMtools**

Document Status

File Name: Cap-20.SLDPRT


## Project management



### Key features

- Creating a custom serial number on data cards
- Creating a counter per project based on the variables of the folder maps
- Create a button in the data card to increment the meter or recalculate the concatenation of a variable with the counter
- For myCADtools users, the ability to use the same counters set in SmartProperties

### Key differences with PDM

Key differences with PDM	my	
Creating a serial number	✓	✓
Link a data card variable to the counter	✓	
Create buttons to increment the counter and insert it into the value of a variable	✓	



### Value your data cards

With SerialNumbers, automatically create counters by project or document type.



# CopyLink

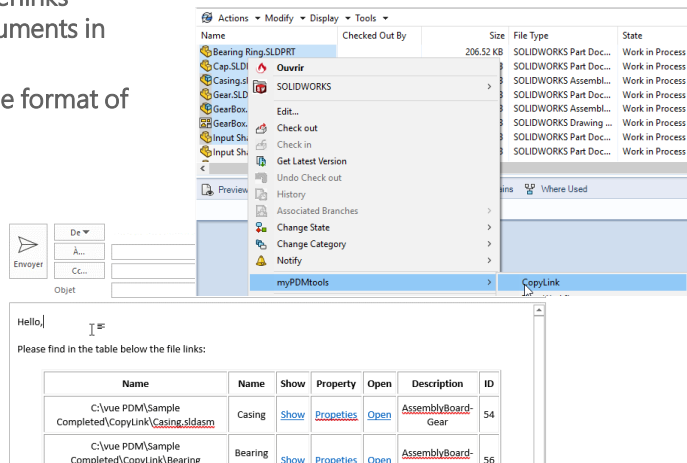
Copy PDM hyperlinks from selected documents in the vault

## Project management



CopyLink allows you to copy PDM hyperlinks (open, explore, etc.) from selected documents in the vault.

You can set a template to customize the format of the information to be copied.



## Key features


### ➤ Creating a link for the following actions :

- Open /Open document folder
- Get the latest version of the document
- Get the document history
- View document properties

### ➤ Defining a table containing for each file :

- Data map variables
- Links

## Key differences with PDM

	my	
Copy the hyperlinks of selected files in the paper press	✓	✓
Create a table with links and properties of data cards	✓	
Send an email automatically with the information of the selected files	✓	
Copy the folder link	✓	



## Improve your communication

With CopyLink, save time in communicating with your organization by easily sending file information to be changed or validated.

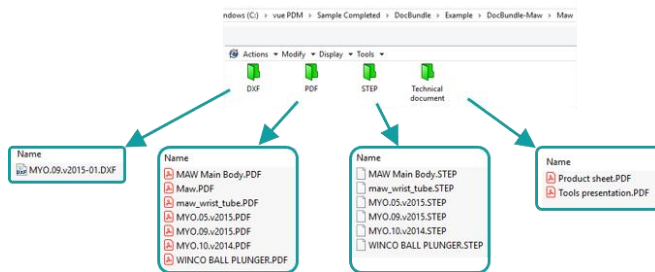
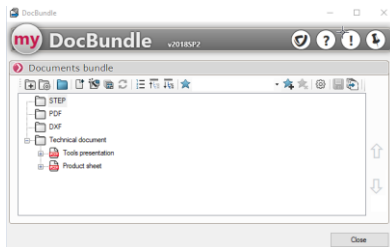


# DocBundle

Easily export all the elements needed for manufacturing

DocBundle allows you to create a multi-format, PDF or multi-format documentary bundle containing all the documents needed to make a project. It also generates a folder structure to group certain files by type (sheet metal, plan, parts,...).

This simplifies the generation and dissemination of information around your projects.



## Key differences with PDM

Creating a documentary bundle of all files related to a project



Personalization of the documentary bundle (pagination, watermark, guard page,...)



Generation of bundles by a SOLIDWORKS PDM task



# Project management



## Key features

- Bundle created automatically when changing state
- PDF documentary bundle (CONVERSION of SOLIDWORKS and Office files, etc.)
- Documentary bundle in the form of folders (zip): Creating folders (groups) classifying files by type
- Automatically adding files to groups depending on the type of document or ownership of the file



## Simplify the generation and dissemination of information

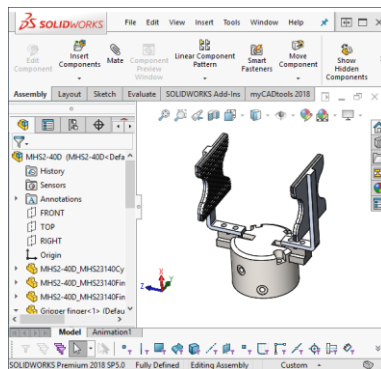
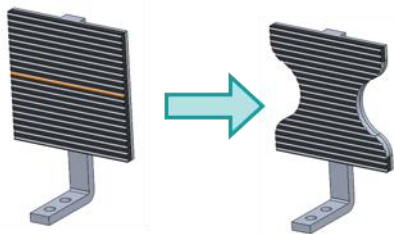
With DocBundle, save time by exporting all manufacturing-related elements to your assemblies without any interaction with users when validating your assemblies.



# PDMRebuild

Rebuilding your documents after a dependence update

PDMRebuild allows you to update your SOLIDWORKS assemblies and layouts with a planned PDM task following parts modification.



## Project management



### Key features

- Automatic execution of PDMRebuild to archive documents in PDM.
- Search for use cases of selected files
- Rebuilding documents with a planned PDM task

### Key differences with PDM

Reconstruction of SOLIDWORKS employment cases when changing a document



Assemblies and layouts always up to date



### Make it easier to update data and documents

With PDMRebuild, don't worry about taking your changes into account and updating documents.



# DocPublication

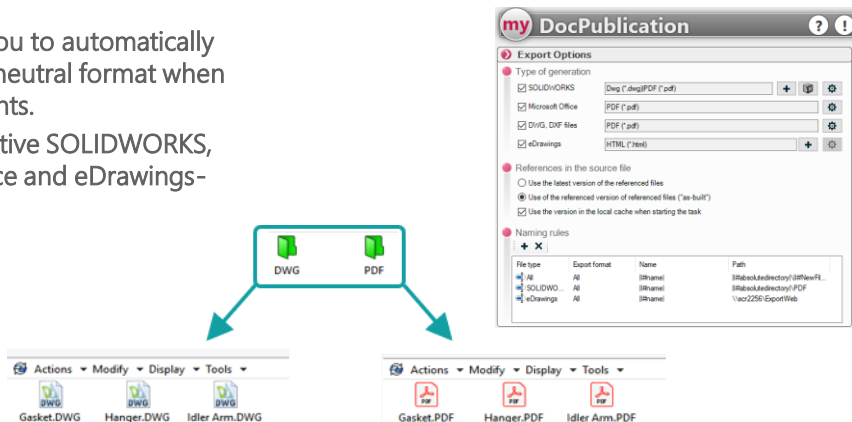
Generating PDF documents automatically when validating files in SOLIDWORKS PDM

Produce



DocPublication allows you to automatically generate your files in a neutral format when validating your documents.

This tool can process native SOLIDWORKS, Autocad, Microsoft Office and eDrawings-compatible formats.



## Key differences with PDM

	my	
Export of Microsoft Office files in PDF format	✓	✓
For multi-layered layouts, generate one file per layer	✓	
Generation with eDrawings	✓	
Generation with DraftSight Premium (not SOLIDWORKS) for DWG and DXF files	✓	✓
Moving, deleting, taking version of old files generated	✓	

## Key features

- Opportunity to choose conversion format (PDF, TIF, IGS, ...) by document type for SOLIDWORKS files
- Storage of generated PDF documents, in the vault or out of the vault with management options for older versions
- Defining the name and location of documents with variables
- Opportunity to provide or add variables to update in the data map of generated documents
- Delayed processing with a planned task



## Gain flexibility

With DocPublication, you'll be more flexible and adapt the conversion of your files to your company's requirements





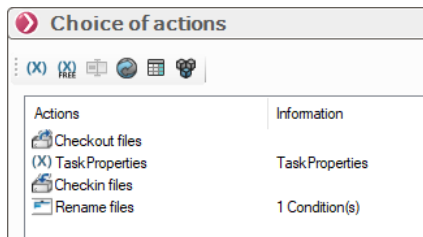
# TaskActions

Apply multiple myPDMtools actions in a single SOLIDWORKS PDM task

Produce



TaskActions allows you to merge together multiple myPDMtools actions on your files when changing document status. For example, you'll be able to create a custom serial number, name documents, manage your review tables, convert your documents, etc.



Name
00001625.SLDPRT
00008935.SLDPRT
00010612.SLDASM
00014664.SLDASM
00015537.SLDASM



Name
008-STD-40.SLDPRT
008-STD-36.SLDASM
008-STD-37.SLDASM
008-STD-38.SLDASM
008-STD-39.SLDPRT

## Key features

- Tools to change the variable values of PDM cards with TaskProperties
- Converting files with DocPublication
- Manage review tables in SOLIDWORKS layouts with RevisionTable
- Launch a myCADtools Integration project
- Renaming documents



## Automate your tasks

With TaskActions, increase flexibility in naming your documents and update the SOLIDWORKS plan review table and then publish PDF documents when postings.

### Key differences with PDM

Merge actions in a single PDM task





# RevisionTable

Automatic SOLIDWORKS update review table

Produce



RevisionTable allows you to create or update the review table automatically when validating documents in PDM.

List of variables in the table

Name	Column
(x) #KeepSOLIDWORKSInformation	1
(x) Revision	2
(x) Description	3
(x) #KeepSOLIDWORKSInformation	4

Attribute name:



REVISIONS				
ZONE	REV.	DESCRIPTION	DATE	APPROVED
	B	Bearing	13/02/2019	System Administrator

myPDMtools		Bearing		160-Bearing		160-40	
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## Key features

- Creating a review table
- Using PDM variable values to inform the SOLIDWORKS review table
- Managing the number of table lines and the order of insertion
- Auto-trigger when changing status



## Automate the creation or updating of tables

With RevisionTable, save time on filling review tables and use information from PDM to supplement information from SOLIDWORKS.

### Key differences with PDM

Automatic management of the review table (number of lines, latest changes)



Automatic filling of the review table





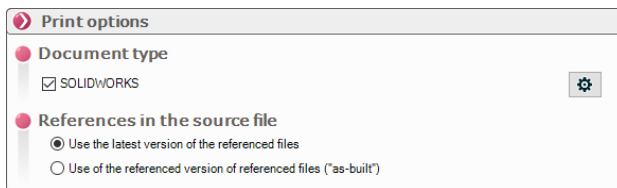
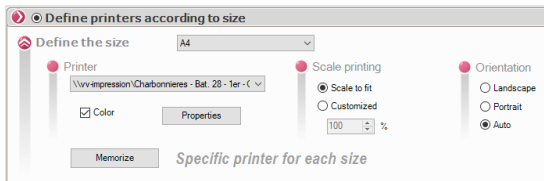
# DocPrinter

Automatically print a list of SOLIDWORKS documents to printers based on formats

Produce



DocPrinter allows you to automatically print a list of SOLIDWORKS documents when changing the status by distributing prints to different tracers or printers based on the size of the formats.



## Key features

- Triggering printing in the life cycle
- Line thickness management table
- Automatic distribution of prints on different printers based on formats
- Creating custom properties for printing

### Key differences with PDM

	my	
Automatic printing of a bundle of plans on one or more printers depending on formats	✓	
Managing document properties when printing	✓	



## Make printing tasks easier

With DocPrinter, save time printing SOLDWORKS layouts and don't ask any more questions thanks to the power of PDM workflows and DocPrinter's intelligence that automatically sends the document to the right printer based on the format.



# PDMMessage

Sending custom notifications manually or automatically when changing status

Produce



PDMMessage allows you to format message templates and then notify users.

It can be used from other myPDMtools tools (e.g. Copylink) or automatically during a state change via the use of PDMseage in PDM tasks.

The message will consist of an introduction, a table containing the metad data of the files and a conclusion.

Do Transition 'Release Documents'		
Change state on files:		
Type	File Name	Warnings
	ASKUBAL_KI_14.sldasm	
	_Rod_ends_KI_14_gk_2.sld...	
	_Rod_ends_KI_14_gl_4.sld...	
	_Rod_ends_KI_14_R_6.sld...	



● Recipients by a condition

If  +

Equal to

To ...

From: prossignol@myCADmarket.com

To: approbateur@visiativ.com

Date: 12/02/2019 16:37:38 +01:00

Subject: Result of tasks

Message Headers Body Sections Raw

Hello,

Here is the result of processing PDM tasks:

Nom
C:\vae PDM Sample
CompletedPDMMessage\Rod_ends_KI_14_gk_2.sldprt
C:\vae PDM Sample CompletedPDMMessage\ASKUBAL_KI_14.sldasm

## Key features

- Personalizing notifications
- Setting recipients automatically based on rules
- PDM or email notification via SMTP

## Key differences with PDM

Recipient set automatically based on document rules

Notification in tasks

Personalizing the notification message

✓	
✓	✓
✓	



## Boost your communication

With PDMMessage, make it easier to exchange relevant information with the message template and the automatic choice of recipients.



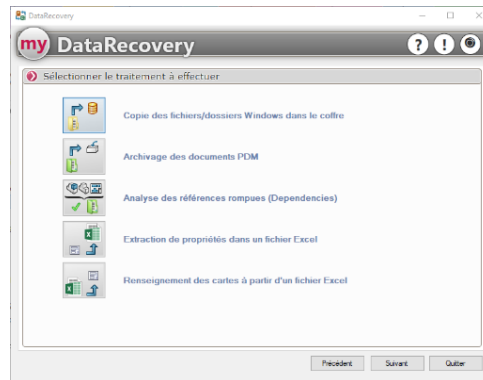
# DataRecovery

Helping file migration in PDM and updating metadata

Manage




DataRecovery allows you to import your documents en masse into PDM and value document data cards via an Excel file.



## Key features

- Importing multiple files into PDM
- Exporting card information to an Excel file
- Filling PDM data cards from Excel file
- Creating a folder structure from an Excel file
- Fixed broken SOLIDWORKS references in PDM
- Processing automation and planning

## Key differences with PDM

	my	
Importing multiple files into PDM	✓	✓
Date filter, file type	✓	
All data cards can be automatically filled in with information contained in a simple Excel file	✓	
Collect the contents of the variables of the data card properties of a PDM vault directory, in order to insert them into an Excel file	✓	



## Make it easier to import multiple documents

With DataRecovery, don't forget any information without any risk of error by automating the update of metadata in your documents daily and without any action on the part of the user.



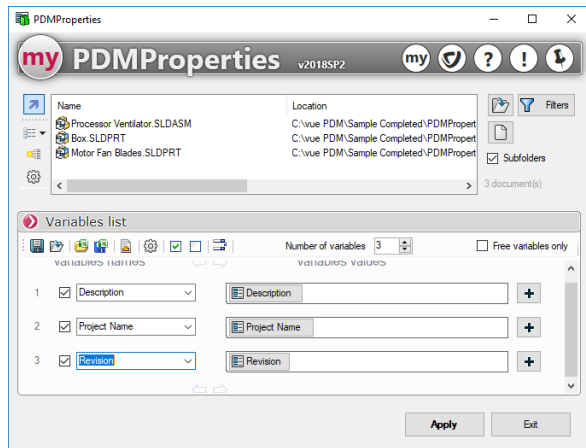
# PDMProperties

Manage multiple data cards from a set of files

Manage



PDMProperties allows information to be valued in data maps by calculating the values for each document independently.



## Key features

- Calculating custom property values (concatenation, split, truncation of existing values)
- Transferring attributes from one configuration to another
- Mass selection of PDM documents or files
- Valuing cards with values from folder cards, files, calculated PDM values, counters or simple texts

## Key differences with PDM

Valorization of PDM metadata on a batch of documents



Copying attribute values from one configuration to another



## Mass-broadcast attributes in your configurations

With PDMProperties, you allow your administrator to correct your documents by recovering the values and applying them to all configurations.



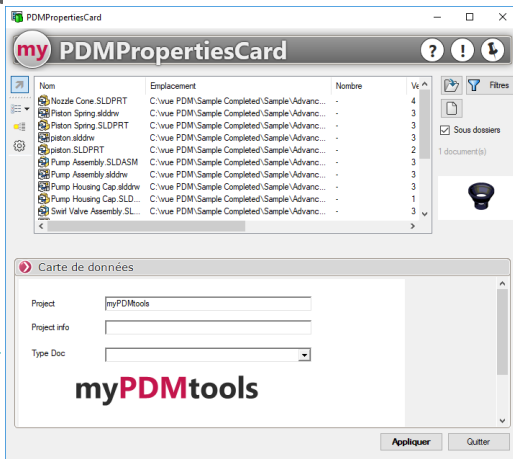
# PDMPropertiesCard

Change metadata from a SOLIDWORKS PDM data card

Manage



PDMPropertiesCard allows metadata to be valued from a SOLIDWORKS PDM data card on a set of documents.



Options des cartes de données

☐ Utiliser la carte de données du fichier ou du dossier

☒ Forcer la même carte de données pour chaque fichier ou dossier

Carte pour fichier: SolidWorks 3D +

Carte pour dossier: Carte dossier +



## Key features

- Consolidating documents
- Viewing a single data card for all documents



## Easily update your data

With PDMPropertiesCard, your users can easily and error-free add information from a PDM data card over multiple files.

### Key differences with PDM

Valorization of PDM metadata on a batch of documents from a PDM data card





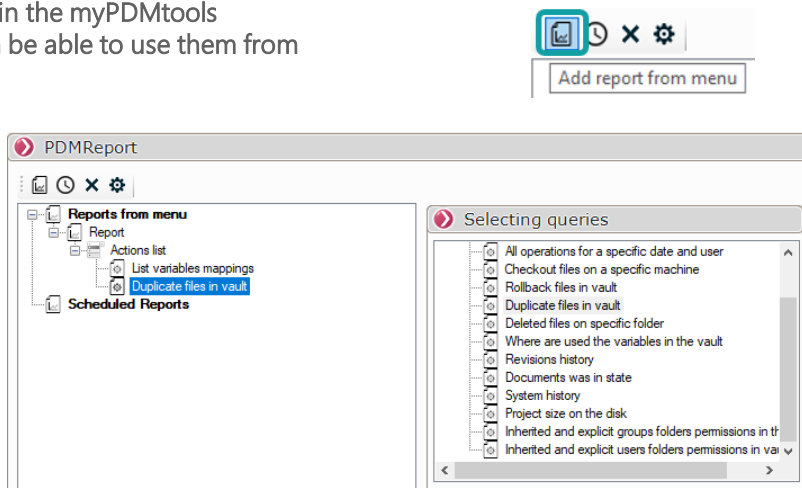
# PDMReport

Analyze SOLIDWORKS PDM databases with pre-defined queries

Manage




PDMReport allows the administrator to set up several types of reports in the myPDMtools interface. Users will then be able to use them from the pop-up menu.



## Key features

- List the maps of variables used in the safe
- List all files extracted on a specific workstation
- List restored files, duplicate files, deleted files
- Get system history, including vault updates
- Planning report exports from PDM tasks
- Personalizing variables to display in results

## Key differences with PDM

	my	
Create planned reports	✓	
Create reports from a pop-up menu	✓	



## Easily analyze your data

With PDMReport, you can easily analyze your documents in PDM and export the results to Excel format.





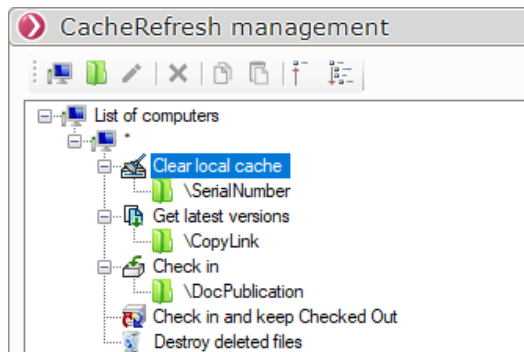
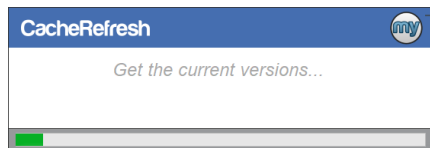
# CacheRefresh

Perform operations on the SOLIDWORKS PDM view

Manage



CacheRefresh allows you to perform operations on the local cache and archive files in the PDM vault.



## Key features

- Empty the local cache
- Get the latest versions of the files
- Archive and keep extract
- Destroy deleted files
- Triggering actions from the Windows task planner

## Key differences with PDM

		
Empty the local cache, get the latest versions	✓	✓
Define actions related to each workstation	✓	
Triggering from a Windows system event	✓	



## Secure your data

With CacheRefresh, save your document changes in PDM on a daily basis while keeping hold on upcoming changes by exporting the extracted file.



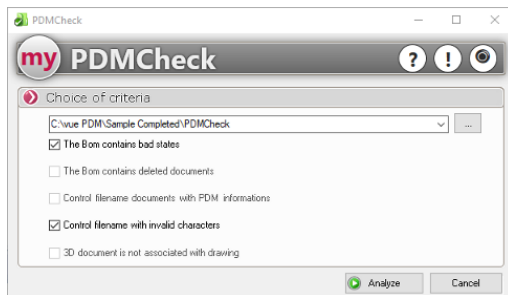
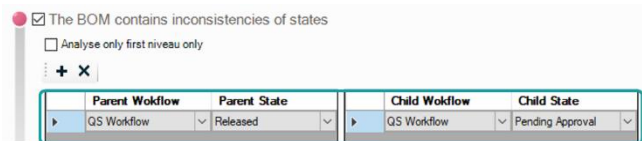
# PDMCheck

Launch an analysis of SOLIDWORKS PDM reference links and document statements

Manage



PDMCheck allows you to analyze the bill of materials to verify that they do not contain deleted documents or with inconsistent states.



## Key features

- The bill of materials contains state inconsistencies, deleted documents, etc.
- Check whether the files in a bill of materials are at the latest version
- Control file names of documents with information
- File names contain prohibited characters
- A 3D document in a valid state is not associated with a planing in a defined state



## Easily analyze your data

With PDMCheck, check that on a given project, validated assemblies do not contain deleted documents or invalid states.

### Key differences with PDM

To carry out the analysis of the bill of materials





# PDMViewer

Viewer eDrawings displaying SOLIDWORKS PDM data card information

Be informed



PDMViewer displays information in PDM data cards when the user clicks on a component in the viewer's graphics area.

Number of lines: 3

Line 1	File name: <input type="text" value="Folder name or file"/>	+
Line 2	Project name: <input type="text" value="Project Name"/>	+
Line 3	Article code: <input type="text" value="SerialNumber"/>	+



## Key features

- Defining the values of the data cards to be displayed
- Route through the Windows explorer of the selected component in the graphics area

## Key differences with PDM

View metadata values from 3D selection in eDrawings



## Simply display your data

With PDMViewer, you can access important information directly from the eDrawings graphical interface.



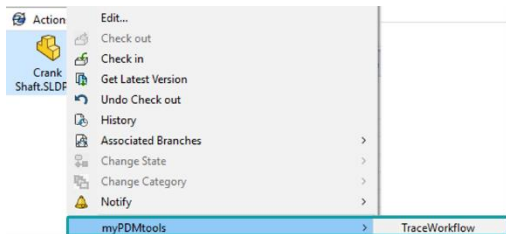
# TraceWorkflow

View graphically the position of the document in the workflow

Be informed



TraceWorkflow makes it easy to see the state of the workflow in which a document is located.



## Key features

- View the status of the document in the workflow diagram
- Graphic visualization



## View the status of the flow

With TraceWorkflow, improve the user's understanding of document positioning in the workflow.

### Key differences with PDM

View the status of the document in the workflow diagram





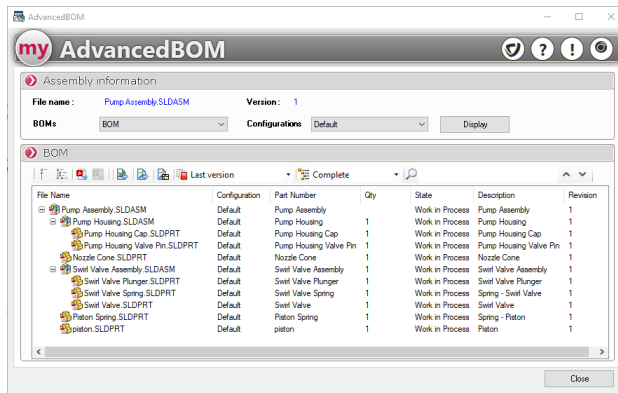
# AdvancedBom

View and exploit bill of materials from SOLIDWORKS

Be informed



AdvancedBOM displays the PDM bill of materials for export or a full text search of the result.



## Key features

- Search for components in the PDM bill of materials
- Export of results in Excel or CSV format
- From the result, navigate the Windows Explorer with a right click
- Search and export PDF files from the layouts of the items displayed in the bill of materials

## Key differences with PDM

View a PDM bill of materials



Export of PDFs of plans out of the PDM vault



Full text search in bill of materials



## Make it more efficient

With AdvancedBom, save time by exporting existing PDFs from layouts out of the PDM vault with one click.



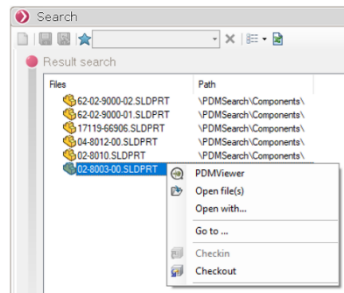
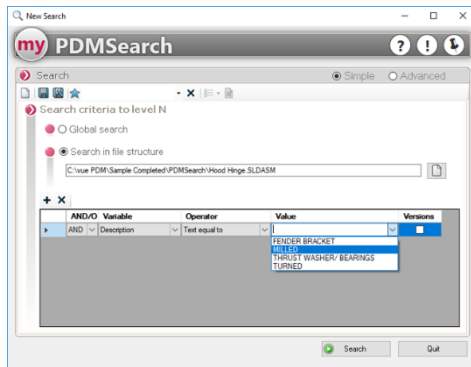
# PDMSearch

Searching for documents in a PDM vault and in a document structure

Be informed




PDMSearch allows you to search different levels of bill of materials or only in the content of a project's references.



## Key features

- When defining the search, displaying the available values in the database
- Search in a multi-level structure
- Search for jobs

## Key differences with PDM

	my	
Searching for documents via attribute values	✓	✓
Search in a structure	✓	
Searching for documents based on the value of job case attributes	✓	



## Optimize your search

With PDMSearch, it's easy to find all the assemblies that use a document with a given property value.