

3DEXPERIENCE Cloud Services for SOLIDWORKS QuickStart Implementation

Store and manage your SOLIDWORKS data on the cloud with this 5 day consultancy package. Includes expert training, guided app installation, and a standard system configuration for smooth integration and a streamlined workflow.

INTRODUCTION

The QuickStart focuses on **developing the skills and concepts** needed for successful software usage. It allows users to get started with 3DEXPERIENCE and its integration within SOLIDWORKS for storing and managing design data. **An expert Visiativ engineer** will perform a standard level of configuration of your 3DEXPERIENCE data management system as per Visiativ requirements.

THE OFFER INCLUDES:

- Guided training from one of our expert engineers.
- Access to formal learning resources.
- Guided installation of 3DEXPERIENCE Native apps.
- Standard configuration of your 3DEXPERIENCE Tenant as per defined requirements.

REQUIREMENTS:

- Completed Cloud Eligibility check.
- Certified hardware preferred.
- Administrator access on user workstations where required.
- Internet connection with compatible network performance: Bandwidth should be >4Mb/s. Latency should be 350m/s.
- Support access to customer tenant where required.
- User availability for training.

OFFER SUMMARY

- Standard configuration of your system performed by an expert engineer as per our QuickStart consultancy offering.
- Comprehensive training course for your users on the configured system.
- Administrator fundamentals training course on your newly configured system, for your defined admin users.
- Assisted troubleshooting throughout and ongoing support.
- Includes 0.5 day Aftercare for additional guidance and support.

ADVANTAGES OF THE 3DEXPERIENCE PLATFORM

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|--|---|
| ✓ Built-in data management with your familiar SOLIDWORKS tools | ✓ No server or IT requirements |
| ✓ Your latest SOLIDWORKS data is available anywhere, on any device | ✓ Easy to deploy and install |
| ✓ Secure and always up-to-date | ✓ Collaborate with others seamlessly |
| | ✓ Complete and scalable design traceability |

3DEXPERIENCE Cloud Services for SOLIDWORKS QuickStart Components

▶▶ OFFER COMPONENT		ALLOCATED TIMEFRAME
● Starting Out Session	A 'Starting Out' session is held so your assigned 3DEXPERIENCE Engineer can provide all information to ensure you can make the decisions you need for configuration of your system.	0.5 day
● Quickstart basics implementation and advanced options: Workflows, Change Actions and Routes	The assigned 3DEXPERIENCE Engineer will configure the system and explains your workflow options and how to create and use a validation and approval routes that fits your companies needs.	2 days
● Administrator Training	Administrator training is performed on the configured system. This will help the admin users manage the already configured system.	1 day
● User Training	User training is performed on the configured system.	1 day
● Aftercare	Aftercare Includes 0.5 day additional guidance and support.	0.5 day



3DEXPERIENCE Cloud Services

QuickStart Basics Configuration - 1 day

►► OFFER COMPONENT

1. USER SETUP	<ul style="list-style-type: none"> • Invite users to system, max x5 • Create User Groups, max x2
2. DEFAULT SYSTEM OPTIONS	<ul style="list-style-type: none"> • Default search results option • Bookmarks In Work by Default
3. DEFAULT SYSTEM CONFIGURATION	<ul style="list-style-type: none"> • Create 1x std Dashboard • Create 1x Collaborative Space • Modify default Revision Scheme • Modify file naming rules (CAD Family, Physical Product, Drawing files) • Create and link attributes to SOLIDWORKS Custom Properties for: <ul style="list-style-type: none"> → CAD Family, max x3 → Physical Product, max x3 → Drawing, max x3
4. CREATE COMPATIBLE FILE TEMPLATES & SAVE TO 3DEXPERIENCE	<ul style="list-style-type: none"> • SOLIDWORKS Part, max x1 • SOLIDWORKS Assembly, max x1 • SOLIDWORKS Drawing, max x1 • <i>Note: this includes linking properties and attributes</i>



3DEXPERIENCE Cloud Services QuickStart Administrator Training - 1 day

►► OFFER COMPONENT

1. INITIALISATION OF THE 3DEXPERIENCE PLATFORM	<ul style="list-style-type: none"> 3DEXPERIENCE Administrators Platform Management Dashboard Invite Members Assign Roles Access Roles and Applications Create and Administer User Groups
2. CREATE YOUR WORKING ENVIRONMENT	<ul style="list-style-type: none"> Predefined Dashboards Create Dashboards Dashboard Widgets Share Dashboards
3. STORE, MANAGE AND SHARE DATA	<ul style="list-style-type: none"> Create and Manage Collaborative Spaces Access Rights and Permissions File Maturity Lifecycle and Workflow Overview of Chosen Workflow Review Maturity Settings Create and Manage Bookmarks
4. EXISTING DATA AND DATA MIGRATION	<ul style="list-style-type: none"> Save New Files to 3DEXPERIENCE Save Existing Files to 3DEXPERIENCE Bulk Upload Create and Manage Standard File Libraries SOLIDWORKS Toolbox
5. CHOSEN SOLIDWORKS DATA MANAGEMENT	<ul style="list-style-type: none"> Overview of Default Options Chosen Revisions in 3DEXPERIENCE Part Naming Overview Edit Part Naming Rules Create and Edit 3DEXPERIENCE Attributes Create and Edit SOLIDWORKS Custom Property Links
6. SOLIDWORKS SETUP REVIEW	<ul style="list-style-type: none"> Template Overview Save Templates to 3DEXPERIENCE Edit Existing Templates Property Tab Builder Overview Typical File Set Review Save to 3DEXPERIENCE Process Overview

SOLIDWORKS and 3DEXPERIENCE

User Training - 1 day

1. GETTING STARTED WITH 3DEXPERIENCE IN THE BROWSER

- What is 3DEXPERIENCE?
- Important Definitions
- Logging In
- Navigate the 3DEXPERIENCE Platform Interface
- Getting Help
- The Welcome Tab

2. THE COMPASS, ROLES AND APPS

- The Compass, Roles and Apps
- Investigate my Roles
- Search for Apps
- Manage my Apps
- SOLIDWORKS Roles and Apps

3. INSTALLATION OF NATIVE APPS

- Pre-requisites
- Native Application Installation
- 3DEXPERIENCE Updates

4. PERSONALIZE YOUR WORKING ENVIRONMENT

- Predefined Dashboards
- Create and Use dashboards and tabs
- Dashboard Widgets

5. STORE, MANAGE AND SHARE DATA

- Collaborative Spaces
- Access Rights and Permissions
- File Maturity Lifecycle and Workflow

6. GETTING STARTED WITH 3DEXPERIENCE IN SOLIDWORKS

- SOLIDWORKS Connected to 3DEXPERIENCE
- Run SOLIDWORKS Connected to 3DEXPERIENCE
- Navigate 3DEXPERIENCE Tools in SOLIDWORKS
- Work Offline
- The MySession Tab
- My Session Options
- Save to 3DEXPERIENCE
- About Permissions

7. STORE, MANAGE AND SHARE DATA

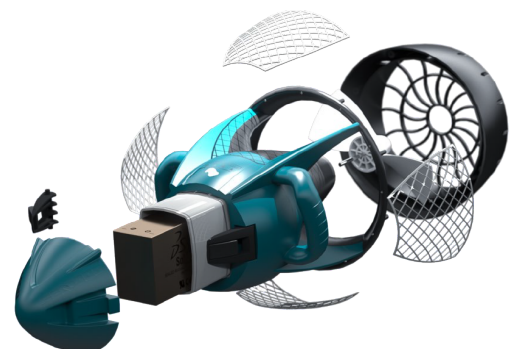
- Save New Files to 3DEXPERIENCE
- Save Existing Files to 3DEXPERIENCE
- Objects Created on Save
- Component Properties
- Search 3DEXPERIENCE
- Close and Open Files
- Change the Maturity of a part
- Add a Part to an Assembly
- Save an Assembly to the Platform
- Status Icons
- About Bookmarks
- The Bookmark Editor
- Saved Assemblies
- The Relations App
- Drawings and BOMs
- Release the Assembly

8. REVISING FILES

- About Revisions in 3DEXPERIENCE
- Modification Requests
- Revisions in Bookmarks
- Additional Browser Applications
- Revising a Released Part
- About Locks
- Revision Scheme
- Additional Revision Processes
- Revision History
- Comparing Revisions
- Other Revision Options
- Cooperation with Multiple Users
- The Bookmark Editor
- Saved Assemblies
- The Relations App
- Drawings and BOMs
- Release the Assembly

9. USING SOLIDWORKS DATA AND ADDITIONAL TOOLS

- Search and 6WTags
- Collaborative Lifecycle
- Collaborative Tasks
- 3DPlay and Exploring Product Data
- Sharing Files



Sharing is growing