



Tips voor een topdag

 **visiativ**



Connect 2024

Welkom!

(myCADtools en) myPDMtools

VERHOGEN VAN PRODUCTIVITEIT,
EFFICIËNTIE ÉN MINDER KANS OP FOUTEN

MET EEN SIMPELE PDM ADD-IN



Introductie

—

- **Wie ben ik?**
- **Wat doe ik?**
- **Ervaring?**
- **lars.boerrigter@visiativ.com**



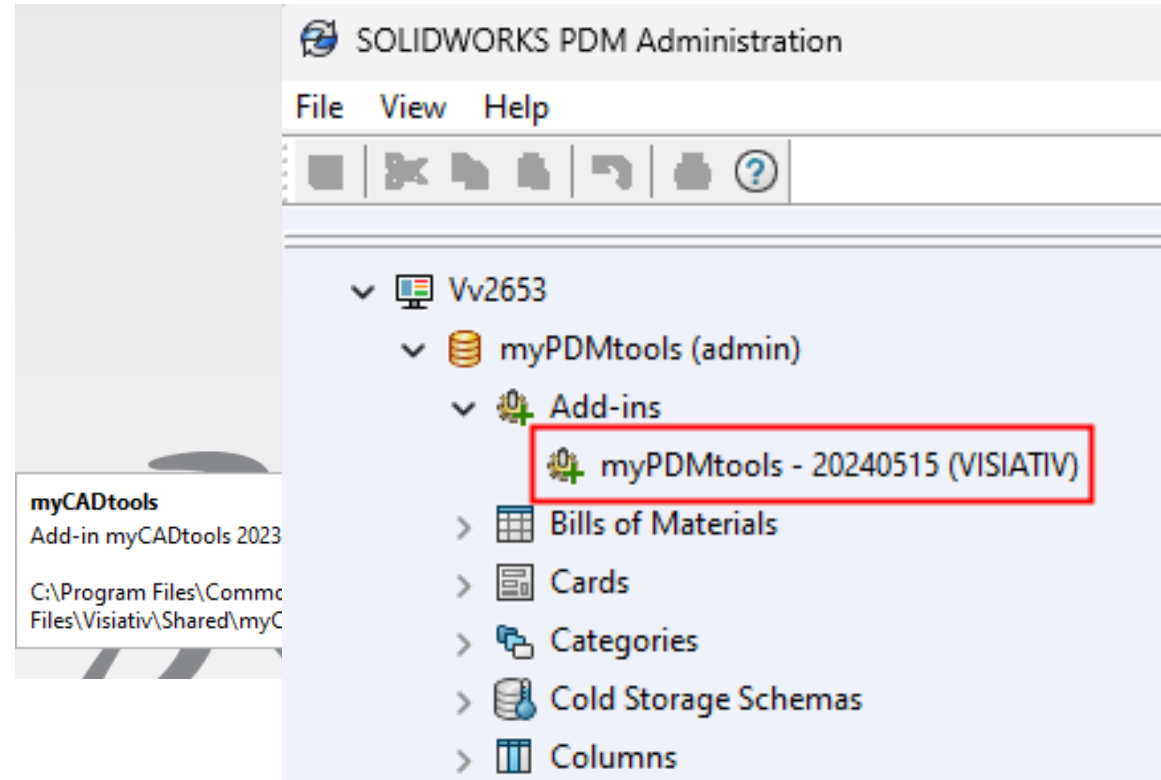
Inhoud

- 1 Algemeen myCAD/PDMtools
- 2 Key Performance Indicators
- 3 Top / meest gebruikte Tools
- 4 Use Cases
 - DynamicList
 - TaskActions
 - DocPublication
 - CardActions
 - DocBundle
- 5 Good to know
- 6 Q&A



Algemeen myPDMtools

- Wat is myPDMtools?
- Doel?
- Wie kan ze gebruiken?





Key Performance Indicators (KPI)

- ~ 20 tools
- ~ 3 versies / jaar
- Klantgericht
- Onderhoudscontract



my Top / meest gebruikte Tools



SmartProperties



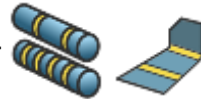
SmartBOM



BatchConverter



ProjectManager



SheetMetalManufacturing
CuttingOptimization



Integration

my Top / meest gebruikte Tools



DataRecovery



CardActions



CacheRefresh



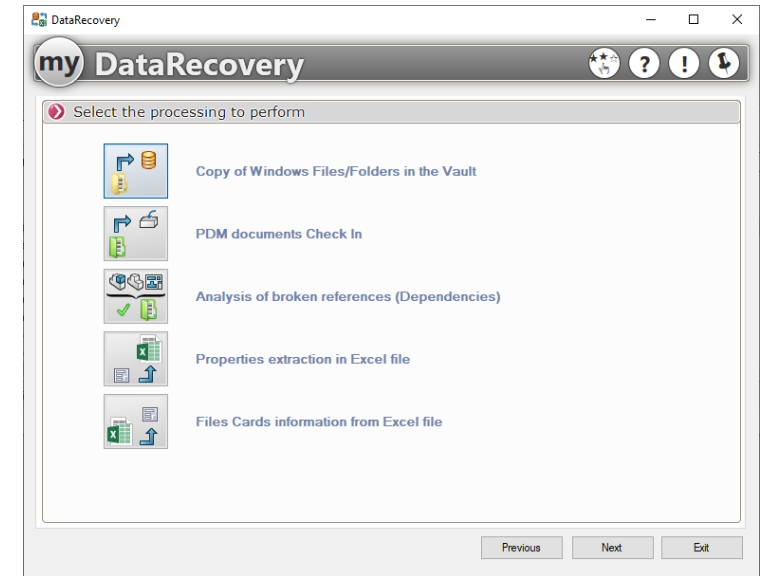
DocBundle





TaskActions



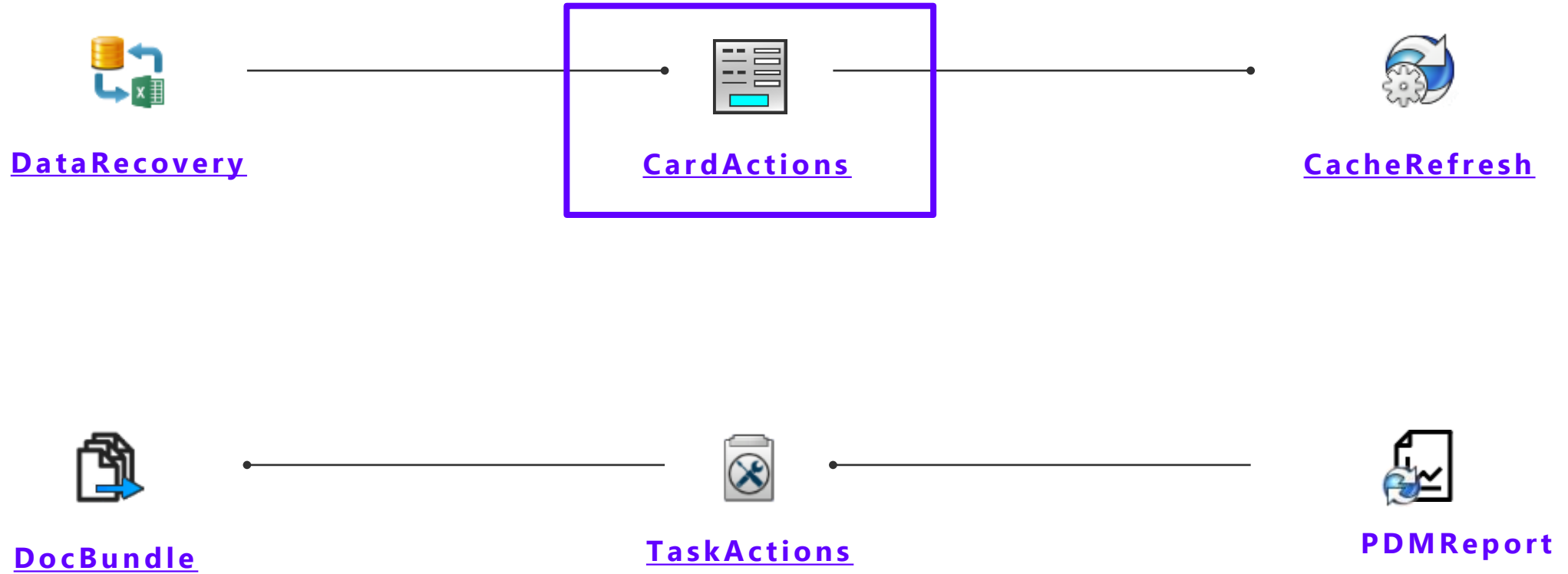
PDMReport



Functionaliteiten		
Bulk importeren in PDM	√	√
Filteren op datum en file type	√	
Aanpassen van waarden op de datakaart met vanuit een excel file	√	
Het ophalen van gegevens op de datakaart en verzamelen in een file	√	



my Top / meest gebruikte Tools





CardActions

Meerdere acties onder een knop op de datakaart



Functionaliteiten



Opvolgende acties vanuit een datakaart knop

✓

Bewerken van metadata

✓

Publiceren naar SharePoint

✓

PDF Stamping

✓

Naam wijzigen van documenten op basis van metadata

✓

PDM taak met voorwaarden vanuit een knop op de datakaart

✓

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

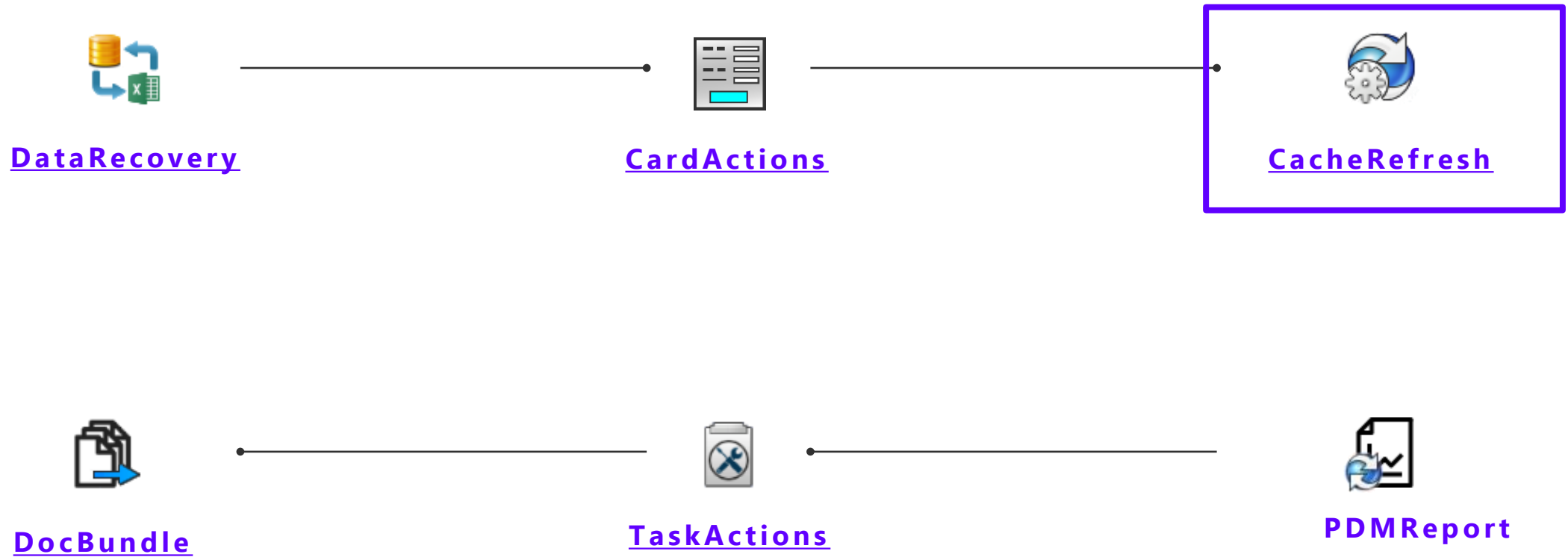
German designation PNEUM, ZENTRIERER

French designation CENTREUR PNEUMATIQUE .

Code K07010

OK Cancel

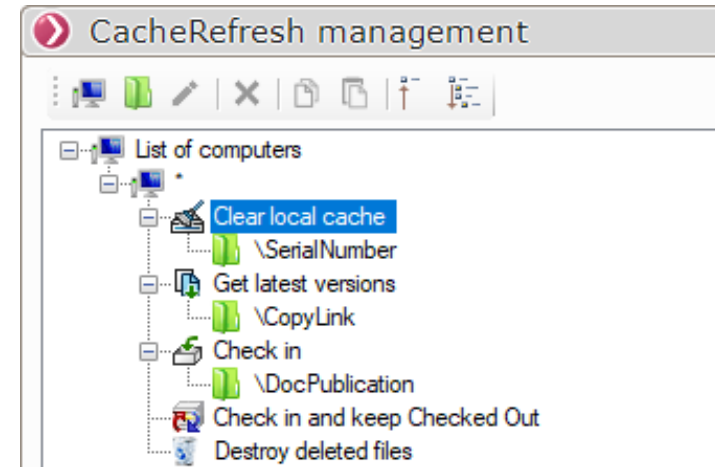
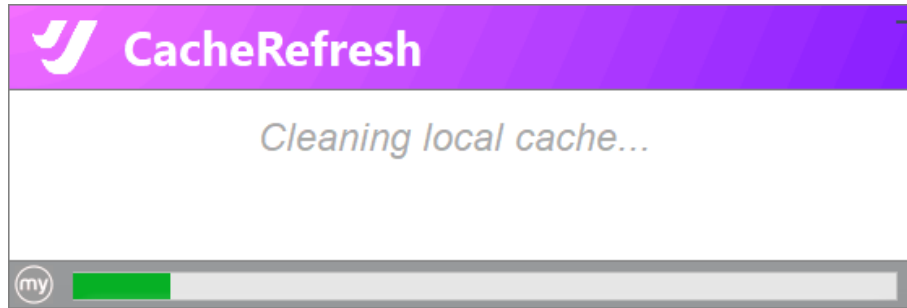
my Top / meest gebruikte Tools





CacheRefresh

Periodiek uitvoeren van acties op de local vault view van SOLIDWORKS PDM



Functionaliteiten	my	
Clear local cache, get the latest version	√	√
Acties maken voor een specifieke PC	√	
Triggers op basis van Windows events (Windows Task Scheduler)	√	

my Top / meest gebruikte Tools



DataRecovery



CardActions



CacheRefresh



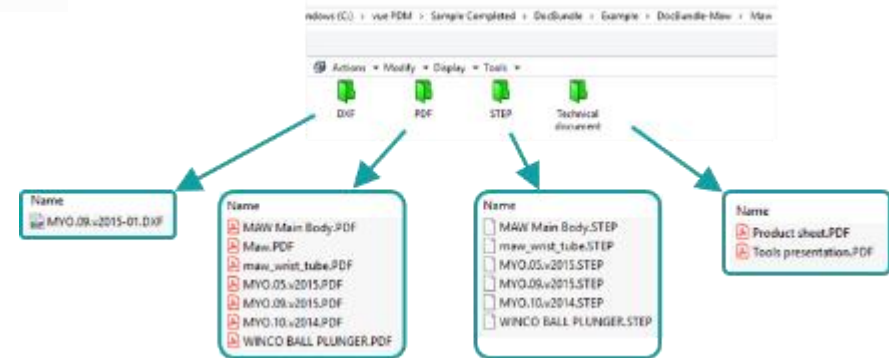
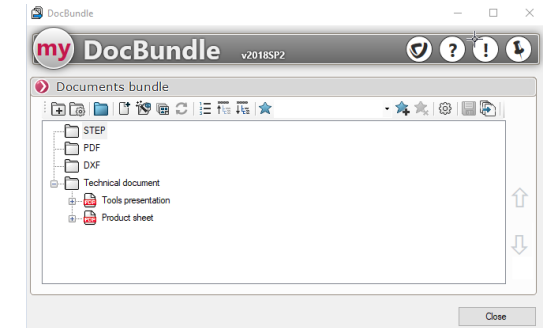
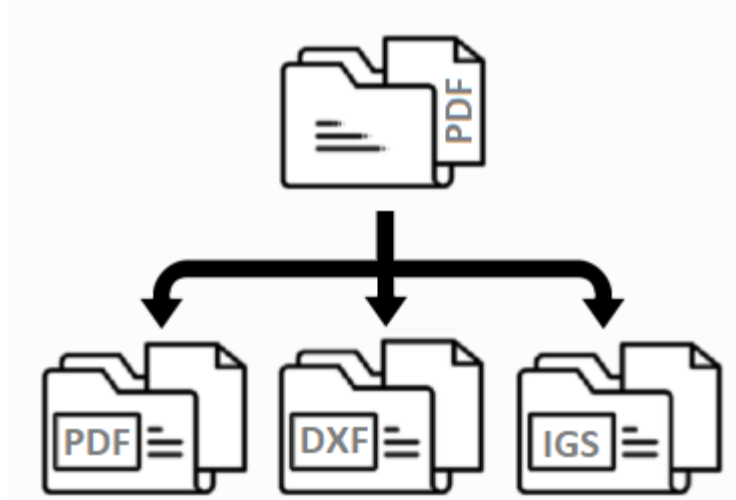
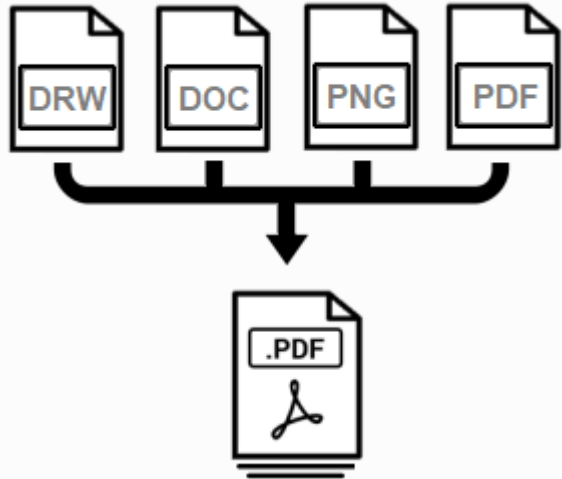
DocBundle



TaskActions



PDMReport



Functionalities



Manueel maken van document bundels

✓

Automatisch bundels maken vanuit een transitie op de workflow

✓

Exports verzamelen of maken in een bundel map

✓

Bundel customizen (Blazijde nummering, watermerk, voorpagina,...)

✓

my Top / meest gebruikte Tools



DataRecovery



CardActions



CacheRefresh



DocBundle



TaskActions

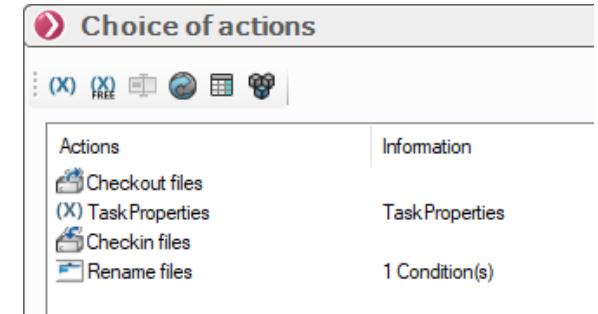


PDMReport



TaskActions

Meerdere acties onder 1 PDM task



Functionalities	my	
Opvolgende acties in een PDM task	√	
Bewerken van metadata	√	
Exporteren via DocPublication	√	
Publiceren naar SharePoint	√	
PDF Stamping	√	
Naam wijzigen van documenten op basis van metadata	√	
PDM taak op basis van voorwaarden	√	

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

my Top / meest gebruikte Tools



DataRecovery



CardActions



CacheRefresh



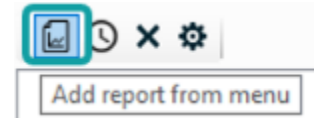
DocBundle



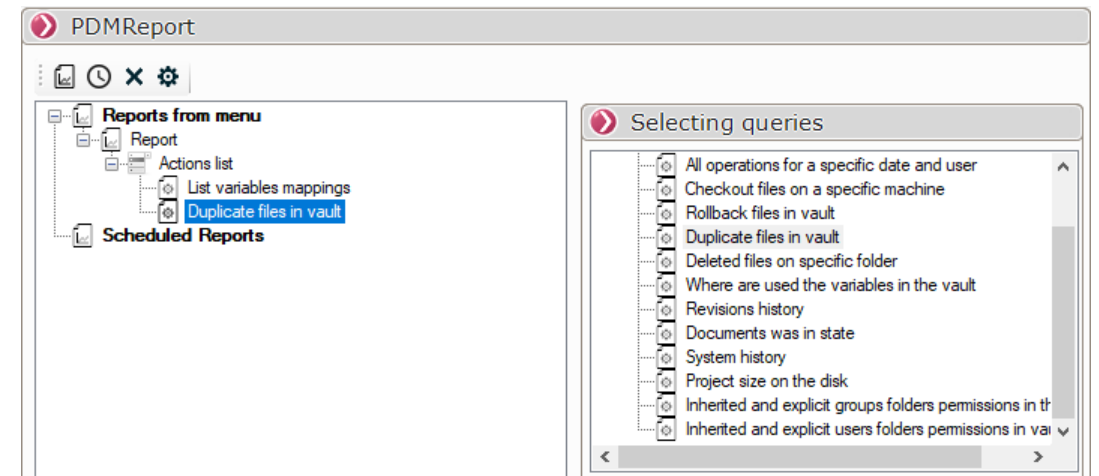
TaskActions



PDMReport



Functionalities	my	
Ingepland maken van rapportages	✓	
Reportages vanuit het rechtermuisknop menu	✓	
Info over de vault data	✓	
Bekijken van uitgecheckte files op een specifieke PC	✓	
Vinden van drawings die niet aan een 3D file gelinkt zijn	✓	



Use Cases

—



DocPublication



TaskActions



CardActions



DocBundle



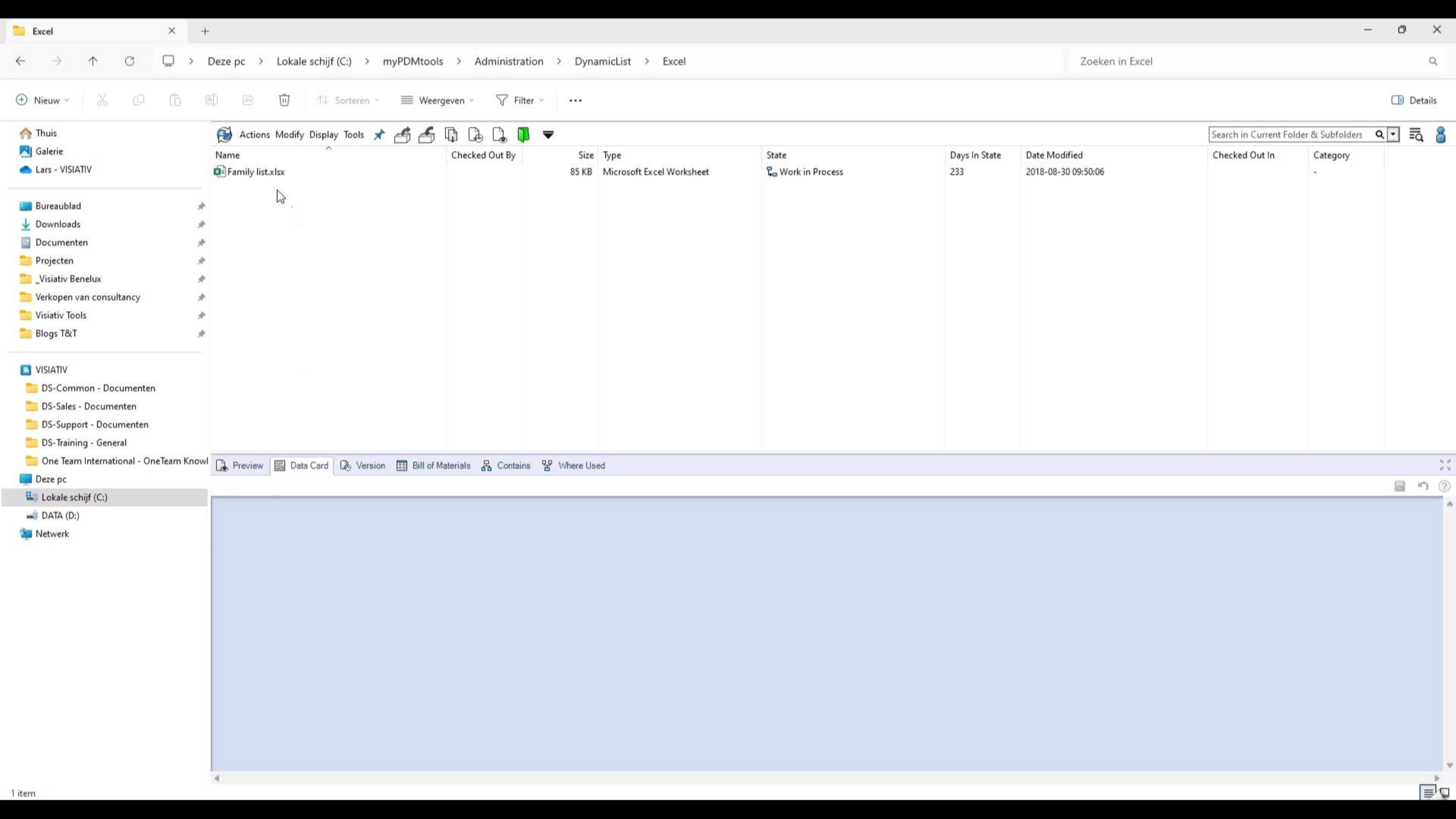
DynamicList



- Afhankelijke dropdown lijsten (met alias)
- Centraal aangestuurd
- Zeer eenvoudig te onderhouden

The screenshot shows the MYPDMTOOLS interface with a 'Sample DynamicList' form. The form has tabs for 'Document Information', 'Designation', and 'Comments'. The 'Designation' tab is active, showing fields for Family Code (K09), Designation EN (NAS STERILISATION FILM), Designation DE (NAS FILM STERILISIERUNG), Designation FR (FILM DE STERILISATION NAS), and Finaly Code (K09010). A red box highlights the 'Set Family Code' button at the bottom. A dialog box titled 'List of group: DynamicList' is open, showing a table with columns for Family, English Name, German Name, French Name, and Code. The 'Code' field is highlighted with a red box, and an arrow points from the 'Set Family Code' button to it.

Family	English Name	German Name	French Name	Code
K09	NAS STERILISATION FILM	NAS FILM STERILISIERUNG	FILM DE STERILISATION NAS	K09010



Name	Checked Out By	Size	Type	State	Days In State	Date Modified	Checked Out In	Category
Family list.xlsx		85 KB	Microsoft Excel Worksheet	Work in Process	233	2018-08-30 09:50:06		-

Preview | Data Card | Version | Bill of Materials | Contains | Where Used



DynamicList

Afhankelijke dropdown lijsten vanuit excel, CSV of SQL



Document Information Designation Comments

Sample DynamicList

Family Code

Designation EN

Designation DE

Designation FR

Finaly Code

Set Family Code

List of group: Training CSV

Family

English designation

German designation

French designation

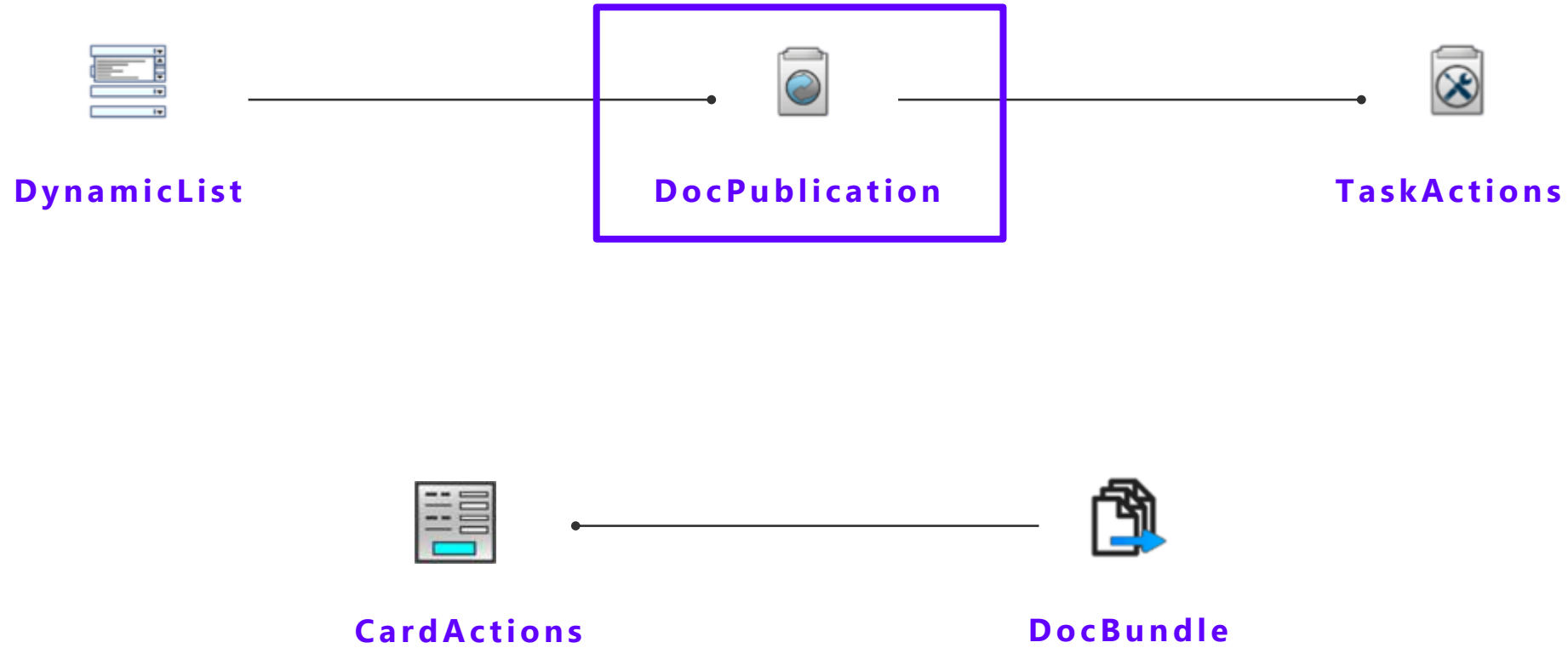
Code

OK Cancel

Functionaliteiten		
Maken van Dynamische datakaart lijsten	✓	
Gebruik 1 file (CSV or Excel) om de menu's te managen	✓	
Meerdere selecties bij de laatste lijst	✓	

Use Cases

—





DocPublication



- 1 export taak
- Onderhoud
- Zeer efficiënte taken
- Exports toevoegen
- File types selecteren

The screenshot shows the 'my DocPublication' application window. On the left, the 'Export Options' panel is visible, with 'SOLIDWORKS' selected under 'Type of generation'. Below it, 'References in the source file' has 'Use the latest version of the referenced files' selected. At the bottom, a table shows the export configuration:

File type	Export format	Name	Path
SOLIDWO...	PDF	#name	#absolutedirectory \Export\P...
SOLIDWO...	STEP-AP214	#name	#absolutedirectory \Export\S...

On the right, the 'Select the export format' dialog is open. It lists various formats with checkboxes. The 'STEP-AP214 (*.step)' format is checked and highlighted with a red box. A red arrow points from the 'Exports toevoegen' bullet point to this checkbox. Another red arrow points from the 'File types selecteren' bullet point to the 'SolidWorks (*.sldprt;*.sldasm;*.slddrw)' format, which is also highlighted with a red box.



- myPDMtools (admin)
 - Add-ins
 - Bills of Materials
 - Cards
 - Categories
 - Cold Storage Schemas
 - Columns
 - Data Import/Export
 - EXALEAD OnePart
 - File Types
 - File settings
 - Indexing
 - Items
 - License
 - Lists
 - Message System
 - Notification Templates
 - Replication
 - Revisions
 - Serial Numbers
 - SOLIDWORKS
 - Tasks
 - Task List
 - DocBundle
 - DocPublication
 - TaskActions
 - Templates
 - Users and Groups Management
 - Variables
 - Workflows
 - PDM Professional
 - PDM Standard
 - Local Settings
 - Web API Servers

DocPublication

my DocPublication

Export Options

Type of generation

- SOLIDWORKS PDF (*.pdf)\STEP-AP214 (*.step) + [cube] ⚙️
- Microsoft Office PDF (*.pdf) ⚙️
- DWG, DXF files PDF (*.pdf) ⚙️
- eDrawings HTML (*.html) + [down arrow] ⚙️

References in the source file

- Use the latest version of the referenced files
- Use of the referenced version of referenced files ("as-built")
- Use the version found in the local cache found on the computer where the task is started

Naming rules

+ X

File type	Export format	Name	Path
SOLIDWO...	PDF	#name	#absolutedirectory \Export\VP...
SOLIDWO...	STEP-AP214	#name	#absolutedirectory \Export\S...

PDM options

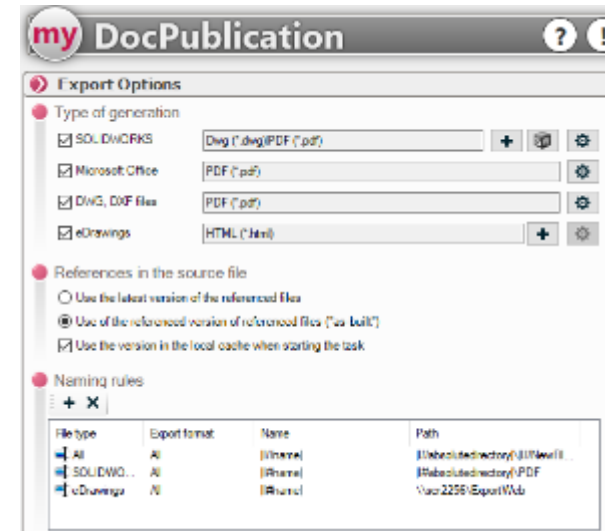
- Add in the context menu: myPDMtools\DocPublication
- Run now (uncheck this option to PDM manages the execution)

< Back
Next >
OK
Cancel
Help



DocPublication

Genereren van meerdere exports binnen 1 PDM export taak



Functionaliteiten



Exporteren vanuit Microsoft Office en DWG/DXF files met Draftsight in PDF format

✓

✓

1 taak voor alle exports

✓

Mogelijkheden om export taken in te plannen

✓

Geavanceerde opties voor het managen van de filenaam en locatie van de exports

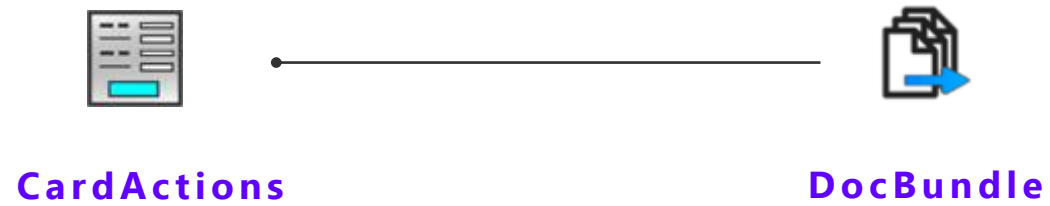
✓

Oude exports verplaatsen in een submap, versie ophogen of verwijderen

✓

Use Cases

—





TaskActions



- Meerdere acties/taken binnen 1 PDM taak
- Acties/taken op basis van voorwaarden
- PDF Stampen
- SharePoint
- myCADtools

The screenshot displays the 'my TaskActions' software interface. The main window is titled 'TaskActions - Properties' and shows a 'Choice of actions' toolbar with various icons. A red box highlights the 'Integration' icon, with a red arrow pointing to a secondary 'my Integration' dialog box. This dialog box is titled 'Integration [New project1.lmact]' and contains the following fields:

- Action name:** Integration
- Condition:** If [] + Equal to []
- Integration Options:** myCADtools Options: Set options (highlighted with a red box); Execute as user: User logged in

A second 'my Integration' dialog box is also visible, showing 'Modification criteria' and 'Condition definition' sections. At the bottom of the main interface, there are fields for 'Tenant Id' and 'SharePoint URL', and a checkbox for 'Save the folder link in a variable'. Navigation buttons '< Back' and 'Next >' are also present.

TaskActions - Properties

TaskActions

- Add-in
- Execution Method
- Tool
- Tool settings**
- PDMMessage
- Permissions
- Success Notification
- Error Notification

my TaskActions

Choice of actions

Actions	Information
DocPublication	DocPublication Yes/No

Options

Add to context menu

Shortcut menu name:

Allow folder selection Take into account the sub-folders

Overwriting the latest version of the file during check in

Check in comment:

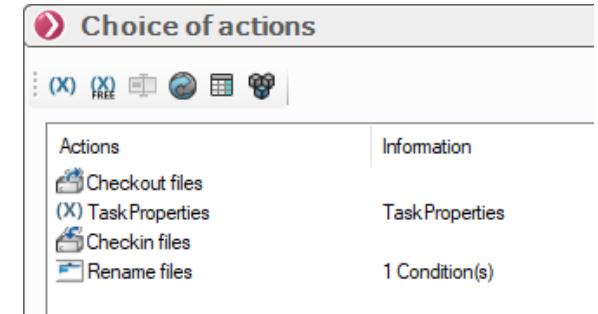
< Back Next > OK Cancel Help

lication?



TaskActions

Meerdere acties onder 1 PDM task



Functionalities	my	
Opvolgende acties in een PDM task	√	
Bewerken van metadata	√	
Exporteren via DocPublication	√	
Publiceren naar SharePoint	√	
PDF Stamping	√	
Naam wijzigen van documenten op basis van metadata	√	
PDM taak op basis van voorwaarden	√	

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

Use Cases

—



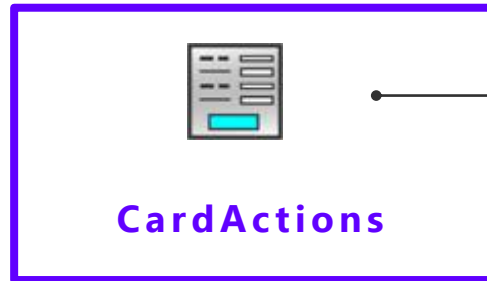
DynamicList



DocPublication



TaskActions



CardActions



DocBundle



CardActions



- Knop op datakaart
- DynamicList uitvoeren
- Voorwaarden stellen
- PDF Stampen
- SharePoint

The screenshot shows the myPDMtools application interface. On the left is a tree view with categories like 'General Options', 'AdvancedBom', 'DataRecovery', etc. The main area is titled 'Creation of buttons for the data card' and contains a 'Buttons' list with a 'List of CardActions buttons' and a 'Button' item. A red arrow points from the 'Publish' button in the 'Buttons' list to a 'CardActions - Publish' dialog box. The dialog box has a title bar with 'my Publish' and several icons. It contains the following sections:

- Conditions:** Action Name: Publish. Condition: If [] + Equals [] +.
- Task options:**
 - Type of publication: []
 - Connection information: [] Check the connection
 - Publish to SharePoint
 - Publish to my3DViewer
 - Microsoft ID: []
 - App Id: []
 - Certificate Thumbprint: []

Sorteren Weergeven Filter

Actions Modify Display Tools

Search in Current Folder & Subfolders 🔍

Name	Checked Out By	Size	Type	State	Days In State	Date Modified	Checked Out In	Category
Export			Folder					
Gasket.SLDDRW		89 KB	SOLIDWORKS Drawing Document	Work in Process	233	2024-02-01 17:03:56	-	-
Gasket.SLDPRT		73 KB	SOLIDWORKS Part Document	Work in Process	233	2024-02-01 17:03:56	-	-
Hanger.SLDDRW		115 KB	SOLIDWORKS Drawing Document	Work in Process	233	2024-02-01 17:03:56	-	-
Hanger.SLDPRT		137 KB	SOLIDWORKS Part Document	Work in Process	233	2024-02-01 17:03:56	-	-
Idler Arm.SLDDRW		402 KB	SOLIDWORKS Drawing Document	Work in Process	233	2024-02-01 17:03:56	-	-
idler arm.SLDPRT		427 KB	SOLIDWORKS Part Document	Work in Process	233	2024-02-01 17:03:56	-	-

Preview Data Card Version 1/1 Bill of Materials Contains Where Used

Sheet1

Document Information

DocPublication? Yes Export

myPDMtools

Document Status

File Name: **Gasket.SLDDRW**

Current State: **Work in Process**

Checked out by:

Created By: **System Administrator**

Last version comment:



CardActions

Meerdere acties onder een knop op de datakaart



Functionaliteiten



Opvolgende acties vanuit een datakaart knop

✓

Bewerken van metadata

✓

Publiceren naar SharePoint

✓

PDF Stamping

✓

Naam wijzigen van documenten op basis van metadata

✓

PDM taak met voorwaarden vanuit een knop op de datakaart

✓

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

Use Cases

—



DynamicList



DocPublication



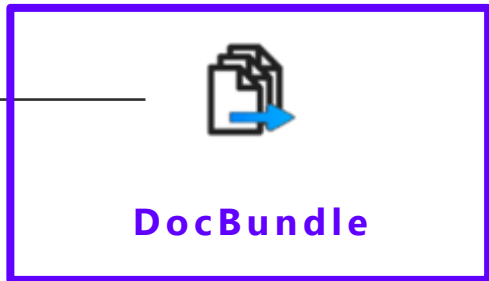
TaskActions



CardActions



DocBundle

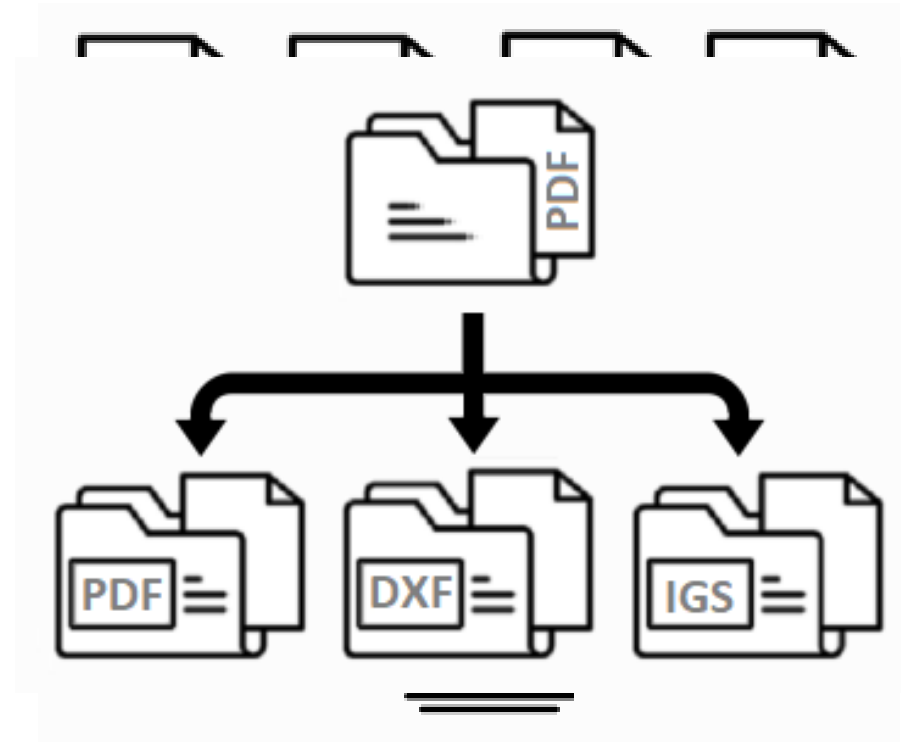




DocBundle



- **Bundel**
- **2 methodes**
- **PDM Task**





Name	Checked Out By	Size	Type	State	Days In State	Date Modified	Checked Out In	Category
Documents to add			Folder					
Example			Folder					
Technical Document			Folder					
DocBundle - Template.mptdb	Admin	10 KB	MPTDB File					

my DocBundle

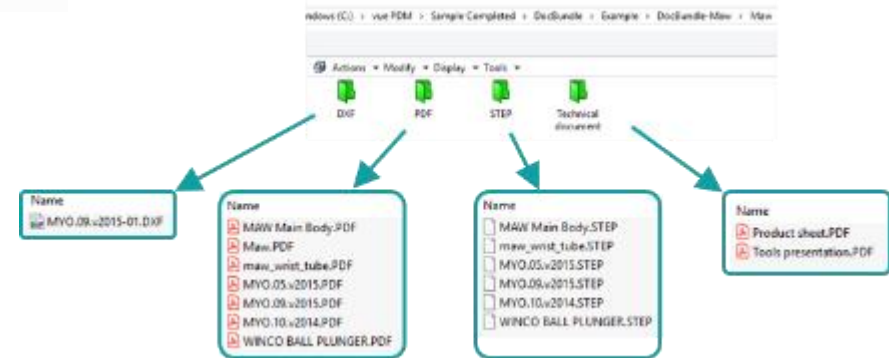
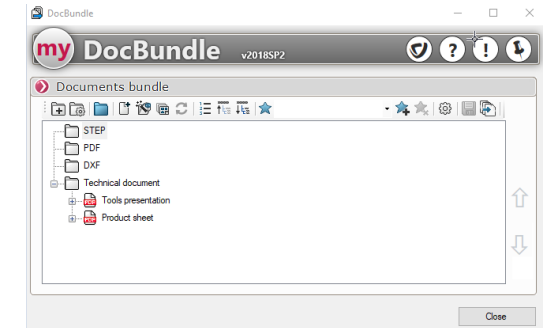
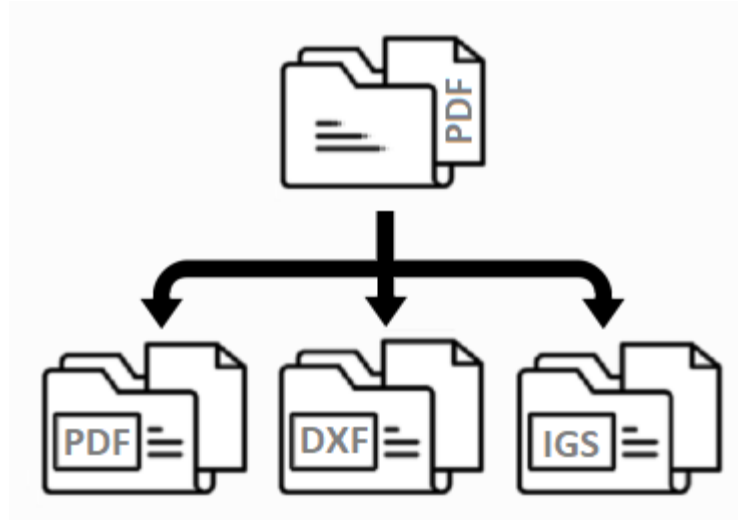
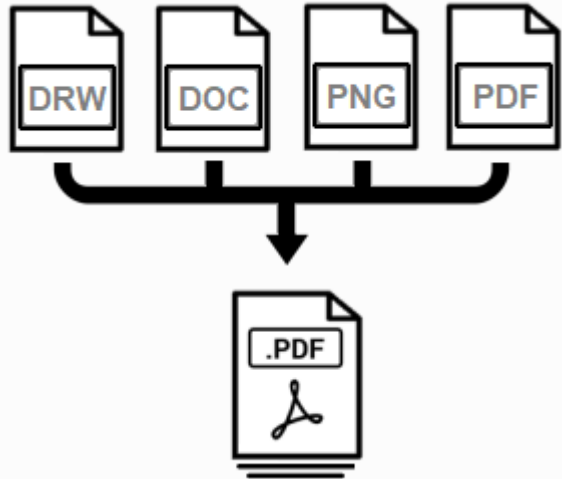
Documents bundle

- 1 Plan
- 2 Docs
 - Doc 1
 - Doc 2
 - Doc 3
 - Doc 4
- 3 Standard Docs

Close



(Menu selection)



Functionalities



Manueel maken van document bundels

✓

Automatisch bundels maken vanuit een transitie op de workflow

✓

Exports verzamelen of maken in een bundel map

✓

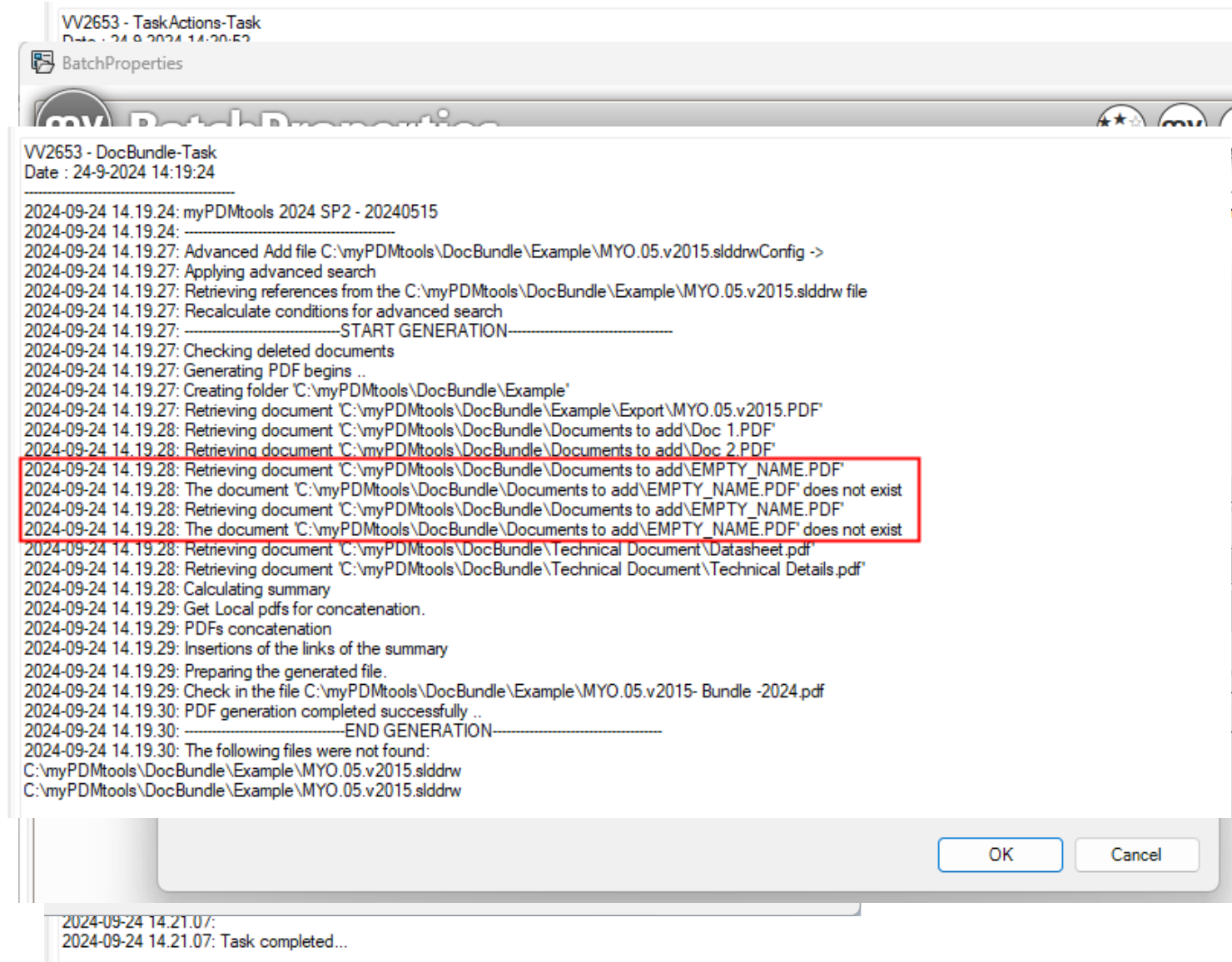
Bundel customizen (Blazijde nummering, watermerk, voorpagina,...)

✓



Good to know

- Combineer TaskActions met myCADtools Integration
- Connectie met batch tools van myCADtools
- Details in de logs van myPDMtools, bijvoorbeeld:
 - TaskActions
 - DocBundle



**Recap + Giveaway
winner**

15.10 – 15:30

By Dolf Broekaart


**Go Digital, Stay
Human**

15:30

By Christian Kromme



Break-out sessions

	ROOM 1 AUDITORIUM	ROOM 2 ZEEMAN	ROOM 3 LORENTZ	ROOM 4 ZERNIKE
				
ROUND 1 11:45	What's New SW 25	MBSE	myCADtools & myPDMtools	Formlabs
ROUND 2 13:10	3D EXPERIENCE	Peel 3D Scanner	Virtual Twins	BOM- Visiativ PLM
ROUND 3 14:00				DriveWorks Automation
GIVEAWAY WINNER?				Simulation vs. Abaqus
				DriveWorks CPQ
				Naam: _____
				Inleveren vóór 14.45

Round 1: 11:45 – 12:30

Break: 12:30 – 13:10

Round 2: 13:10 – 13:55

Round 3: 14:00 – 14:45

Break: 14:45 –

THANK YOU