cadmicro

SOLIDWORKS
PDM STANDARD VS
PDM PROFESSIONAL

Feature Guide

The table below lays out the features available in SOLIDWORKS PDM Standard and Professional, and where they can be found in the PDM interface.

ADMIN TOOL NODES

	PDM STANDARD	PDM PROFESSIONAL
Add-ins		✔
• SWTaskAddIn *2018 & newer	✔	✔
Bills of Materials		✔
Cards	✔	✔
• File Cards	✔	✔
• Folder Cards	✔	✔
• Item Cards		✔
• Search Cards	✔	✔
• Template Cards		✔
Categories		✔
Cold Storage Schemas	✔	✔
Columns	✔	✔
Data Import/Export		✔
• Export Rules		✔
• Import Rules		✔

	PDM STANDARD	PDM PROFESSIONAL
• Variable Alias Sets		✓
File Types	✓	✓
Groups	✓	✓
Indexing		✓
Items		✓
License	✓	✓
Lists (for cards)		✓
Message System	✓	✓
• Database		✓
• SMTP		✓
Replication		✓
• Archive		✓
• Database		✓
Revisions	✓	✓
• Revision number component	✓	✓
• Revision numbers	✓	✓
Serial Numbers		✓
SOLIDWORKS	✓	✓
• Revision Table *2018 & newer	✓	✓
• Toolbox	✓	✓

	PDM STANDARD	PDM PROFESSIONAL
Tasks		✔
• Convert *2018 & newer	✔	✔
Templates		✔
Users	✔	✔
Variable	✔	✔
Workflows	✔	✔

ADMIN TOOL GROUPS/USER PERMISSION

	PDM STANDARD	PDM PROFESSIONAL
Can accept tasks to execute on a host	✔	✔
Can administrate add-ins		✔
Can administrate users	✔	✔
Can create web shares		✔
Can purge history	✔	✔
Can set/delete labels		✔
Can undo check out files checked out by other users	✔	✔

	PDM STANDARD	PDM PROFESSIONAL
Can update card lists	✔	✔
Can update cold storage	✔	✔
Can update columns	✔	✔
Can update document categories		✔
Can update ERP Import/Export settings		✔
Can update indexing settings		✔
Can update item settings		✔
Can update license keys	✔	✔
Can update Mail configuration		✔
Can update Replication settings		✔
Can update Revision numbers	✔	✔
Can update Search favourites		✔
Can update Search forms	✔	✔
Can update Task settings	✔	✔
Can update Template forms	✔	✔

	PDM STANDARD	PDM PROFESSIONAL
Can update Toolbox settings	✓	✓
Can update Variables	✓	✓
Can update Workflows	✓	✓
File vault management	✓	✓
May see administration tool	✓	✓
Must enter state change comments	✓	✓
Must enter version comments	✓	✓
Password protected e-mail	✓	✓
Refuse login	✓	✓

FOLDER PERMISSIONS:

	PDM STANDARD	PDM PROFESSIONAL
Activate computed BOM	✓	✓
Add or rename file		✓
Add or rename folder	✓	✓
Assign file permissions	✓	✓
Assign group membership	✓	✓

	PDM STANDARD	PDM PROFESSIONAL
Can overwrite latest version during check in	✓	✓
Can update the design of cards	✓	✓
Check out file	✓	✓
Delete file	✓	✓
Delete folder	✓	✓
Destroy	✓	✓
Edit folder card data	✓	✓
Edit version free variable data	✓	✓
May see files before initial check in (private state)		✓
Move file	✓	✓
Move folder	✓	✓
Permit or deny group-level access to files	✓	✓
Read file contents	✓	✓
Read named bill of materials		✓
Recover files from recycle bin	✓	✓

	PDM STANDARD	PDM PROFESSIONAL
Restore file from cold storage	✓	✓
Rollback	✓	✓
See computed BOM	✓	✓
Set Revision	✓	✓
Share file to another folder		✓
Show working versions of files	✓	✓

STATE PERMISSIONS:

	PDM STANDARD	PDM PROFESSIONAL
Add or rename file	✓	✓
Can overwrite latest version during check in	✓	✓
Check out file	✓	✓
Delete file	✓	✓
Destroy	✓	✓
Edit version free variable data	✓	✓
Move file	✓	✓
Permit or deny group-level access to files		✓

	PDM STANDARD	PDM PROFESSIONAL
Read file contents	✓	✓
Set Revision	✓	✓
Share file to another folder		✓

TRANSITION PERMISSIONS:

	PDM STANDARD	PDM PROFESSIONAL
Disallow sequential state changes	✓	✓
Permit	✓	✓

PERMISSIONS PER FILE:

	PDM STANDARD	PDM PROFESSIONAL
All users may by default see files created by this user		✓
Only selected groups may by default see files created by this user		✓

SEARCH CARDS:

	PDM STANDARD	PDM PROFESSIONAL
Activate computed BOM	✓	✓
See computed BOM	✓	✓

	PDM STANDARD	PDM PROFESSIONAL
TASKS:		
Access (Allow user to see selected Task)		✓
TEMPLATES		
Access (Allow user to see selected Templates)		✓

WARNINGS:

NOTE: All operations contain option: Can't ignore any warnings

	PDM STANDARD	PDM PROFESSIONAL
Change State:		
• File is check out	✓	✓
• File is in wrong state	✓	✓
• File not found	✓	✓
• Latest version is not attached	✓	✓
• No rights to change state	✓	✓
• The file is not rebuilt	✓	✓
• Unknown file format	✓	✓
Check in:		
• Cyclic reference	✓	✓
• File name is not unique	✓	✓
• File not found	✓	✓
• Local file is modified	✓	✓

	PDM STANDARD	PDM PROFESSIONAL
• Local version has been overwritten	✔	✔
• Missing data necessary for BOM, needs resaving in SOLIDWORKS	✔	✔
• No local copy	✔	✔
• Outside SOLIDWORKS PDM	✔	✔
• SOLIDWORKS Drawing is set to use Independent Revision table	✔	✔
• The file is checked out by another user	✔	✔
• The file is checked out in another folder	✔	✔
• The file is checked out in another computer	✔	✔
• The file is not rebuilt	✔	✔
• The file is open in another application	✔	✔
• Toolbox file is located in a non-Toolbox folder	✔	✔
• Unknown file format	✔	✔

Check out:

	PDM STANDARD	PDM PROFESSIONAL
• Can't check out: Unsupported file type	✔	✔
• Document in multiple projects	✔	✔
• File is checked out	✔	✔
• File not found	✔	✔

	PDM STANDARD	PDM PROFESSIONAL
• No check out rights	✓	✓
• The file is deleted	✓	✓
• The file is open in another applicaton	✓	✓

Set Revision:

	PDM STANDARD	PDM PROFESSIONAL
• A revision is attached to a newer version	✓	✓
• Can't increment revision	✓	✓
• Can't increment revision: End of revision list	✓	✓
• Can't increment revision: File is checked out	✓	✓
• Can't increment revision: Missing revision on referenced file	✓	✓
• Can't increment revision: No revision generator found	✓	✓
• Can't increment revision: You lack sufficient rights	✓	✓
• File not found	✓	✓
• Multiple versions exists in tree	✓	✓
• Somebody else has created a revision on this document	✓	✓
• This file is not rebuilt	✓	✓
• The selected version does not exist	✓	✓

	PDM STANDARD	PDM PROFESSIONAL

CACHE OPTIONS:

Clear cache during log out	✓	✓
Refresh cache during log in	✓	✓

COPY TREE:

Exclude from copy tree	✓	✓

BRANCH:

Exclude from Branch *2018 & newer		✓

SETTINGS:

Adding Files:

• Specify file extensions to automatically add or exclude from the vault	✓	✓
• Add new files silently without showing a notification balloon	✓	✓

Adding Folders:

• Specify folder names to automatically include or exclude from the vault	✓	✓

	PDM STANDARD	PDM PROFESSIONAL
Branch:		
• Specify variables to update by file extensions *2018 & newer		✔
Check in:		
• Include drawings automatically when checking in the model	✔	✔
• Look for drawing in the entire vault (Instead of only the same folder)	✔	✔
• Look for drawings in sub-folders of the folder containing the model	✔	✔
• Look for drawings in parent-folder of the folder containing the model	✔	✔
• Only look for drawings with the same file name as the part/assembly	✔	✔
Copy Tree:		
• Specify variables to update by file extension	✔	✔
Explorer:		
File types to show:		
• Show all files	✔	✔
• Show only files that are part of the vault	✔	✔

	PDM STANDARD	PDM PROFESSIONAL
• Show only local files	✓	✓
Local file clean-up:		
• Automatically delete local read-only files that are not part of the file vault	✓	✓
Miscellaneous:		
• Show inherited values in folder card edit page	✓	✓
• Show full user names	✓	✓
• Show user information pop-up	✓	✓
Checkout files when:		
• The Open command is executed	✓	✓
• The Edit command is executed	✓	✓
File Compare:		
• Install file compare applications		✓
Language:		
• Select language	✓	✓
Menus:		
• Customize menu options		✓

	PDM STANDARD	PDM PROFESSIONAL

Merge:

• Configure Merge Command file handling *2018 & newer		✓

Messages:

Notifications sent by SOLIDWORKS PDM should:

• Cause a sound to be played	✓	✓
• Bring up the New Notification dialog box	✓	✓

Message sent by users should:

• Cause a sound to be played	✓	✓
• Bring up the New Message dialog box	✓	✓

Reference Dialog:

Check out and version access controls:

• Auto select reference files to get latest when checking out	✓	✓
• Always work with latest version of files.	✓	✓
• Enable the get version command in SOLIDOWORKS Add-in	✓	✓
• Check out files silently without showing the check out dialog box	✓	✓
• Try to check out all referenced files when the referencing file is checked out	✓	✓

	PDM STANDARD	PDM PROFESSIONAL

Micellaneous:

• Do not mark referenced files when changing state	✓	✓
• Show "not rebuilt" warnings on drawings and assemblies in need of rebuilding	✓	✓

Toolbar:

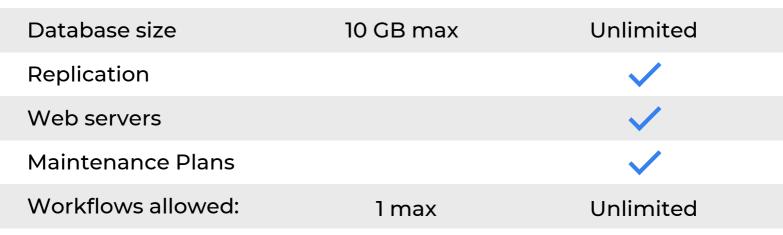|		
• Customize Windows Explorer toolbar		✓

Viewers:

• Add/Remove file viewer applications for specific file extensions	✓	✓

GLOBAL SOLIDWORKS PDM FEATURES

	PDM STANDARD	PDM PROFESSIONAL

SQL VERSION DATABASE DEPENDENT FEATURES:

	PDM STANDARD	PDM PROFESSIONAL
Database size	10 GB max	Unlimited
Replication		✓
Web servers		✓
Maintenance Plans		✓
Workflows allowed:	1 max	Unlimited

	PDM STANDARD	PDM PROFESSIONAL
• Workflow link		✓
• Parallel Transitions		✓
• Auttomatic Transitions		✓
Transition only permissions:		
• Authentication	✓	✓
• Hide when sibling parallel transition is chosen		✓
• Overwrite Latest Version (Files only)	✓	✓
States allowed:	10 max	Unlimited
• Workflow link		✓
• Parallel Transitions		✓
• Automatic Transitions		✓
State only permissions:		
• Initial state	✓	✓
• - Ignore permissions in previous states	✓	✓

VAULT EXPLORER FEATURES:

Move Tree		✓
Report Generator		✓
Search Tool/Favourites		✓
Data card input formulas		✓

	PDM STANDARD	PDM PROFESSIONAL
CLIENT FEATURES:		
SolidWorks add-in	✓	✓
DraftSight add-in	✓	✓
Office add-in integration	✓	✓
Windows/LDAP login	✓	✓
CONNECTORS:		
Pro/E Connector		✓
Solid Edge file support		✓
Autodesk AutoCAD		✓
Autodesk Inventor		✓
CLIEN LICENSE TYPES::		
SOLIDWORKS PDM CAD Editor	✓	✓
SOLIDWORKS PDM Contributor	✓	✓
SOLIDWORKS PDM Viewer	✓	✓