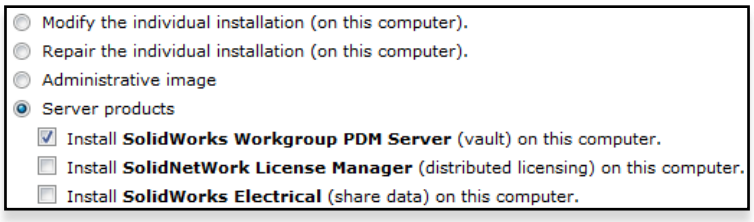
# SolidWorks™ Workgroup PDM Vault

(Installing/Configuring Workgroup PDM Vault for Student)

**Step 1 (Start Install):** Insert SolidWorks CD and wait for the install screen to appear. If the screen does not appear, go into your "My Computer" and start the installation screen there. Once the install screen appears, choose "Server Products" and select "Install **SolidWorks Workgroup PDM Server** (vault) on this computer". Click "  " and install.

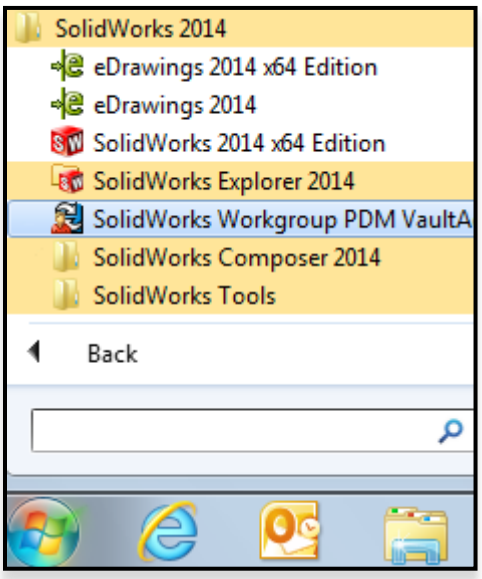





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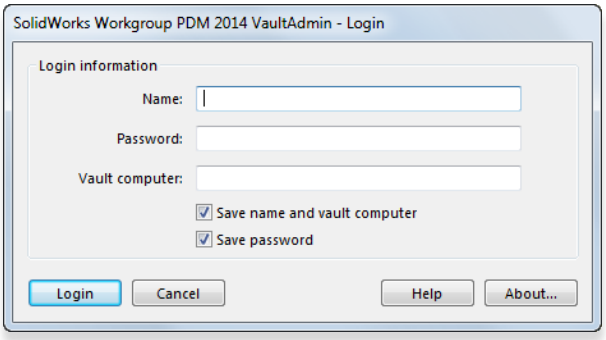
**Step 2 (Open Vault):** Go to your "Start" menu and then "All Programs" → "SolidWorks 2014" and click on "SolidWorks Workgroup PDM VaultAdmin".

(NOTE: The SolidWorks Workgroup PDM VaultAdmin tool was installed as part of the client installation.)




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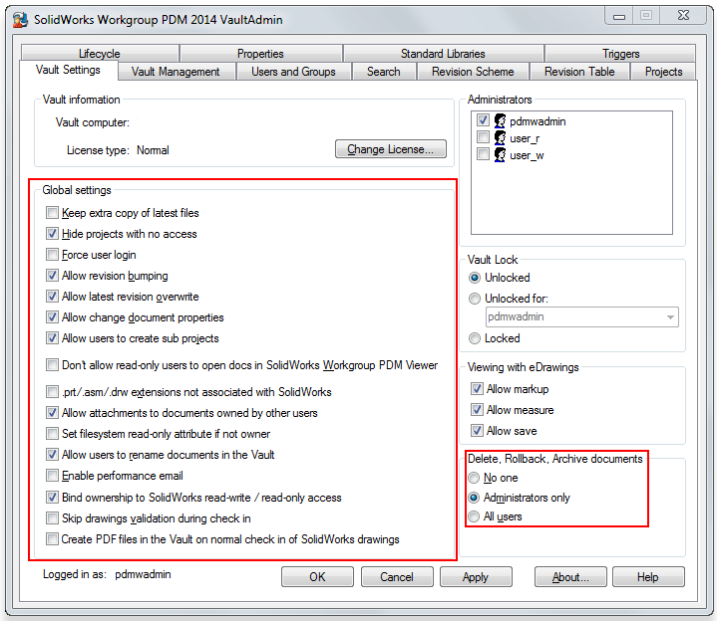
**Step 3 (Initial Login):** Use "pdmwadmin" for your username and password. You will be able to change this later. Enter the name of the computer in which the vault is installed. And then click "Login".



**Step 4 (Initial Setup):** On the left hand side of the screen uncheck “Keep extra copy of latest files”. Then check the following:

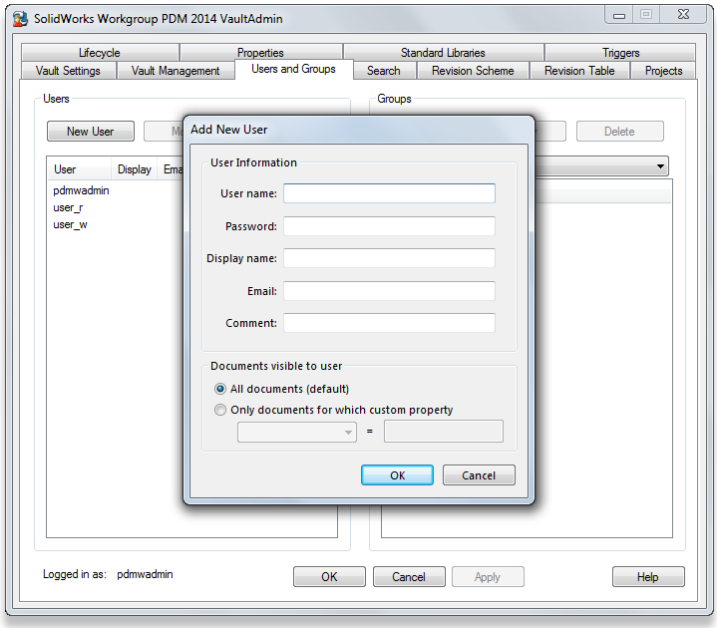
- Hide projects with no access
- Allow revision bumping
- Allow latest revision overwrite
- Allow change document properties
- Allow users to create sub projects

Lastly, change the box on the right side from “No One” to “Administrators only”. Click Apply.

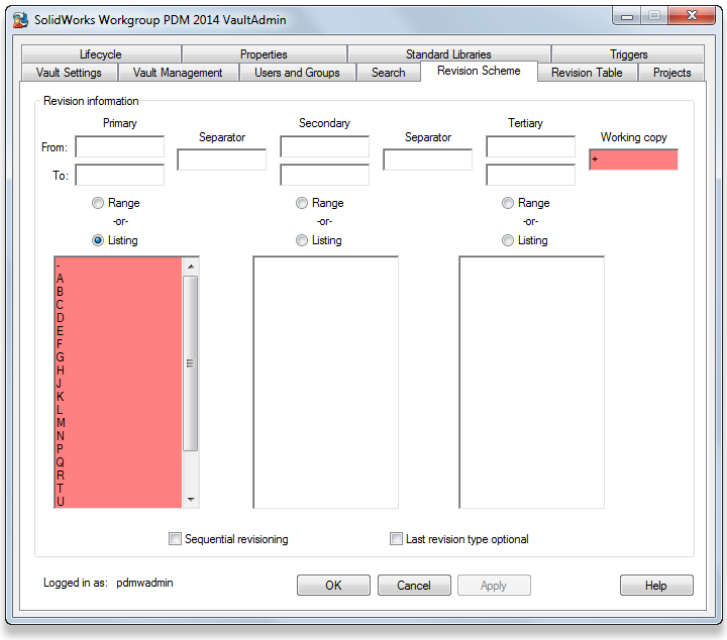



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**Step 5 (Users and Groups):** Click on the “Users and Groups” tab at the top of the VaultAdmin. Click “New User” and add usernames as you would like. You may also want to create groups of users to keep organized and allow easy changes later on. This is on the right hand side of “Users and Groups”.



**Step 6 (Revision Scheme):** Click on the "Revision Scheme" tab. Change your screen to look like the one on the right. Change "Working Copy" to a "+" symbol. Change "Primary" from "Range" to Listing". Enter the alphabet using the following letters to avoid letters that look similar to numbers or other symbols. "-,A,B,…CDEFGHJKLMNPQRTUVWX". Click Apply.




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**Step 7 (Projects):** Click on the "Projects" tab. Click "New project and choose a name and description. Click "OK". Now choose which users and groups have access to the project and what type of access you want to grant them. This can be done by looking at the right hand side of the projects tab.
Click "Apply".

After you are done setting this up, click "OK" at the bottom and you are done!

