SOLIDWORKS MANAGE

OBJECTIVE

SOLIDWORKS® Manage provides SOLIDWORKS customers with a unique set of advanced data management tools. This is accomplished by leveraging the file management capabilities and ease of use of SOLIDWORKS PDM Professional and adding powerful project, process, and item management capabilities, together with interactive dashboards and reporting tools.

OVERVIEW

SOLIDWORKS Manage is an advanced item (or record)-based data management system that includes, or sits on top of, the global file management and application integrations enabled by SOLIDWORKS PDM Professional. Major functional areas available in SOLIDWORKS Manage include Project Management, Process Management, Item Management and the creation of dashboards and reports.

Client and server requirements are basically the same as they are for SOLIDWORKS PDM Professional. SOLIDWORKS Manage runs on the same SQL Server® instance as SOLIDWORKS PDM Professional and has its own dedicated database that connects to SOLIDWORKS PDM Professional vault databases.

SOLIDWORKS Manage has a dedicated desktop User Interface (UI), but users can also access information and functions in Windows® Explorer, and via a SOLIDWORKS CAD add-in. There is also a browser-based UI that does not require any installation on clients. No matter how it is accessed, SOLIDWORKS Manage has an easy-to-use administration tool with graphical UIs, so companies can easily configure and manage the system without a dedicated IT support team or outside consultants.

BENEFITS

- Reduces the time in creating complete Bills of Materials (BOMs) through an easy-to-use editing feature that combines file and record data, and by automatically sharing product data with other business systems.
- Lessens the expense of maintaining multiple data management systems and separate applications by providing access to synchronized data all in one system and by eliminating the need for external resources or consultants.

- Avoids project development time and cost overruns by having all timelines, resources, tasks, and deliverables linked to a common project object and updated in one system.
- Provides project managers with information to make critical product development decisions with the help of interactive dashboards and an overall view of resource capacity.

CAPABILITIES

SOLIDWORKS Manage Professional offers powerful dashboard and reporting tools that can pull data, including project progress, resource allocation, and quality performance from every aspect of the system and present it in a very easy-to-consume way. It supports four major functional areas with the following capabilities:

Project Management

- Manage project stages from project inception to completion with start and finish links, Gantt chart, and Work Breakdown Structure (WBS) views.
- View overall timelines, critical path, and milestones.
- Assign resources to each stage of the project and view utilization and capacity .
- Assign user tasks to track stage completion and provide users with an up-to-date ToDo list.
- Attach records and files in the form of a BOM, reference documents, and deliverables.
- Enable granulation time tracking through the use of timesheets.
- Track progress by utilizing user tasks completion, timesheets, or manual updates.

Process Management

- Configure states and decision points for all types of engineering and business processes.
- Automatically notify stakeholders via email and/or text messages.
- Attach affected records, files, and other related information.
- Enable ad hoc approvers and automatically assign user tasks.
- Automatically create processes via SOLIDWORKS PDM workflow state changes.

Item Management

- Create, edit, and compare complete BOMs using records and files.
- Maintain connected but separate BOM variants.
- Automatically or selectively create records for SOLIDWORKS configurations.
- Add virtual configurations for any object type.
- Push BOM data to SOLIDWORKS drawings, including assigned item or find numbers.

Dashboards and Reports

- Create interactive graphical dashboards to display critical information.
- Utilize many different types of controls to display information such as charts, graphs, date selectors, and lists.
- Configure reports to company standards and publish automatically or on demand.
- Send reports via email attachments in various formats including PDF, Excel®, HTML, and TIFF.

SOLIDWORKS Manage Professional is an all-inclusive application that utilizes Microsoft® SQL Server Standard Edition to provide high performance and scalability. It is included along with integrations to various authoring applications including SOLIDWORKS, DraftSight®, third-party CAD systems, and Microsoft Office®.

There are three basic client types targeted at different user roles:

- SOLIDWORKS Manage Professional Editor is a Windows-based client for engineers and designers who work with SOLIDWORKS and other popular design tools. It includes all the functionality offered in SOLIDWORKS PDM Professional CAD Editor and provides application-specific integrations to manage the complex file relationships and file properties. In addition, all the capabilities for managing projects, participating in processes, creating and editing BOMs and accessing dashboards and reports are included.
- SOLIDWORKS Manage Professional Contributor is a Windows-based client primarily for people who need to manage development projects, create product structures (including CAD and record-based components), and participate in various business processes. In addition, it includes all the functionality offered in SOLIDWORKS PDM Professional Contributor, targeted at people who author non-CAD file data, and other product-related files (such as Word and Excel).
- SOLIDWORKS Manage Professional Viewer is a Windows-based client for users who need to search, view, and print documents. In addition, it includes all the functionality offered with SOLIDWORKS PDM Professional Viewer licenses. It is also appropriate for people who need to participate in SOLIDWORKS PDM Professional-based workflows and SOLIDWORKS Manage-based processes, and who need to view dashboards, run reports, and view project progress.

As with SOLIDWORKS PDM Professional, SOLIDWORKS Manage also has bundled licenses (PSLs) that can be accessed by any of the above client types. All licenses allow users to view and participate in electronic processes and workflows, access dashboards and reports, and view project timelines. In addition, users can access data via the browser-based UI when traveling or away from the office.

nctech®
The **New Tech** Company