

#SEU16

# Welcome to Solid Edge University 2016



#SEU16

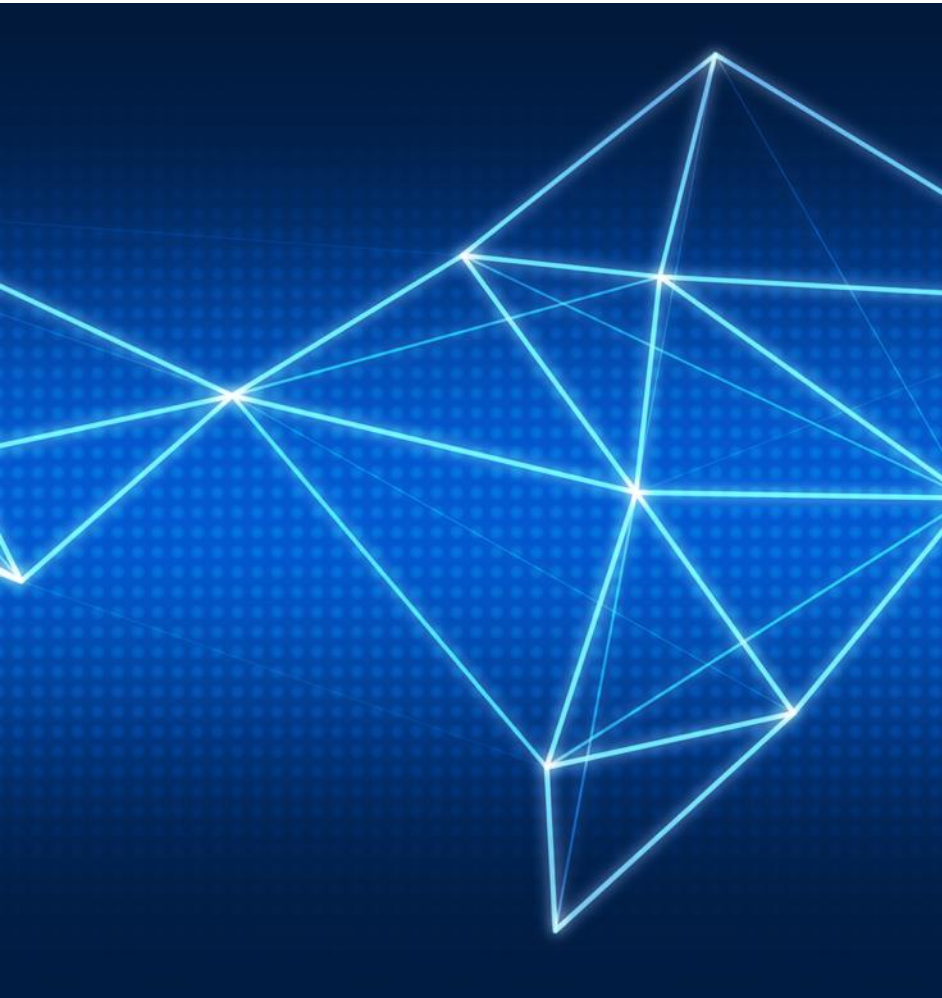
# Built-In Data Management – A disciplined approach to managing Solid Edge files

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Portfolio Development (Mainstream Engineering, India & Sri Lanka)

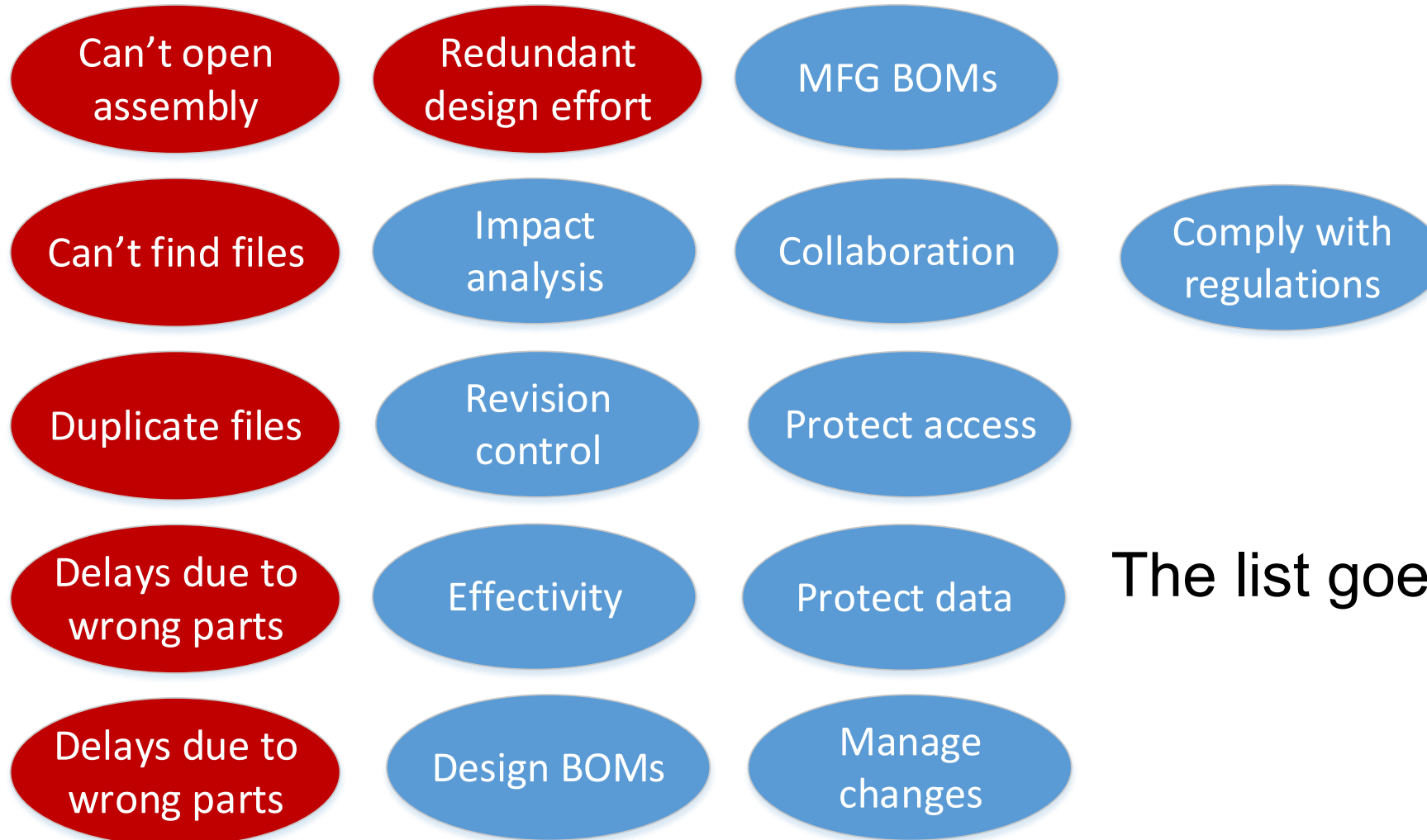


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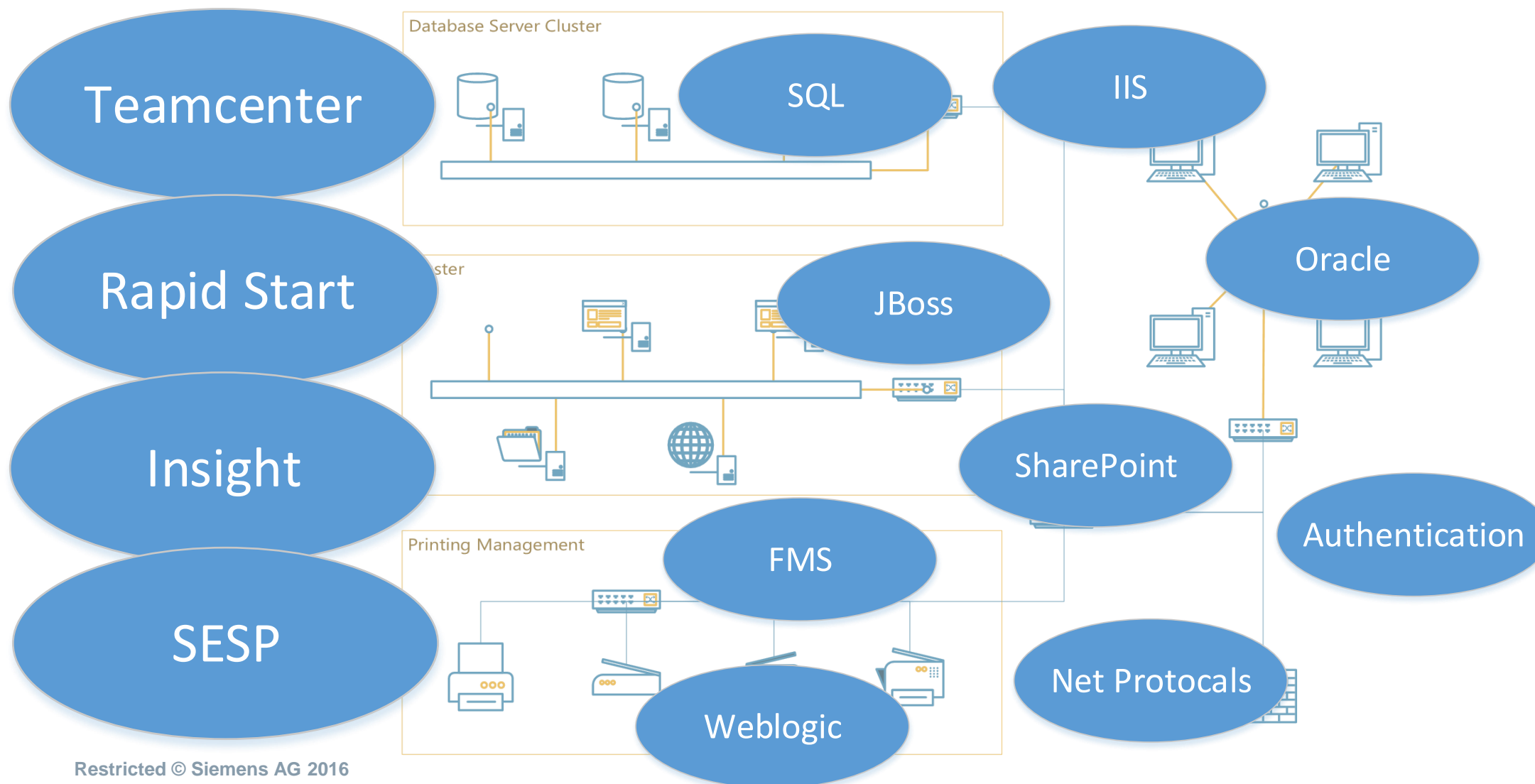


- Need for Data Management
- Data Management –Product or Solution
- Introducing: Built-in Data Management (BiDM) for Solid Edge
- Setting up BiDM
- Demonstrations:
  - Fast Search
  - Custom Properties
  - Where-used & Save As/Revise
  - Unique Document Numbering
  - Lifecycle Management
- “How do I adopt BiDM, where do I start?”
- Summary

# Need for Data Management



# Is Data Management a product or solution?



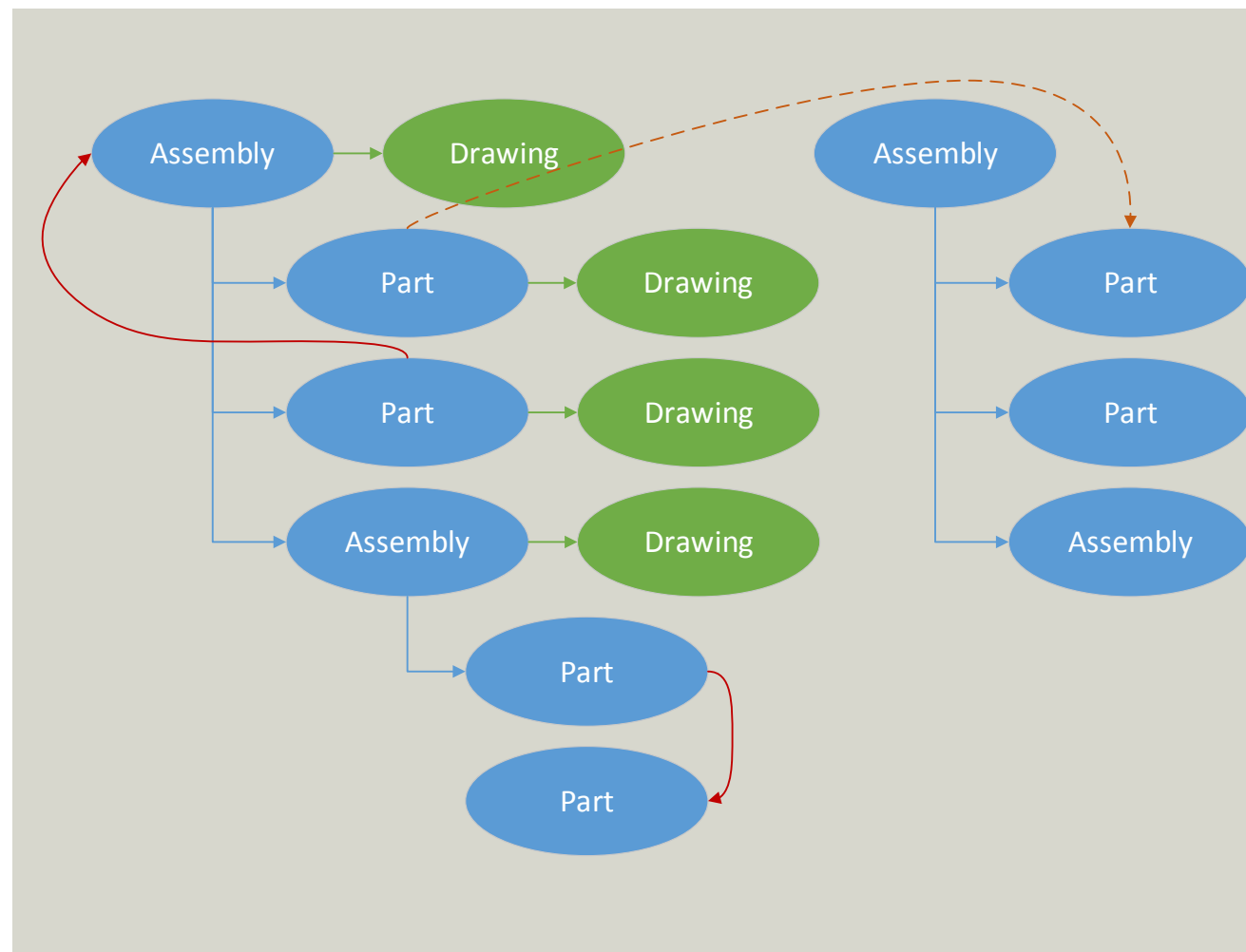
## Standard Operating Procedure

### Assumptions:

- Mostly use Windows Explorer for file copy/revise
- Some may use 'Revision Manager'

### Requirements:

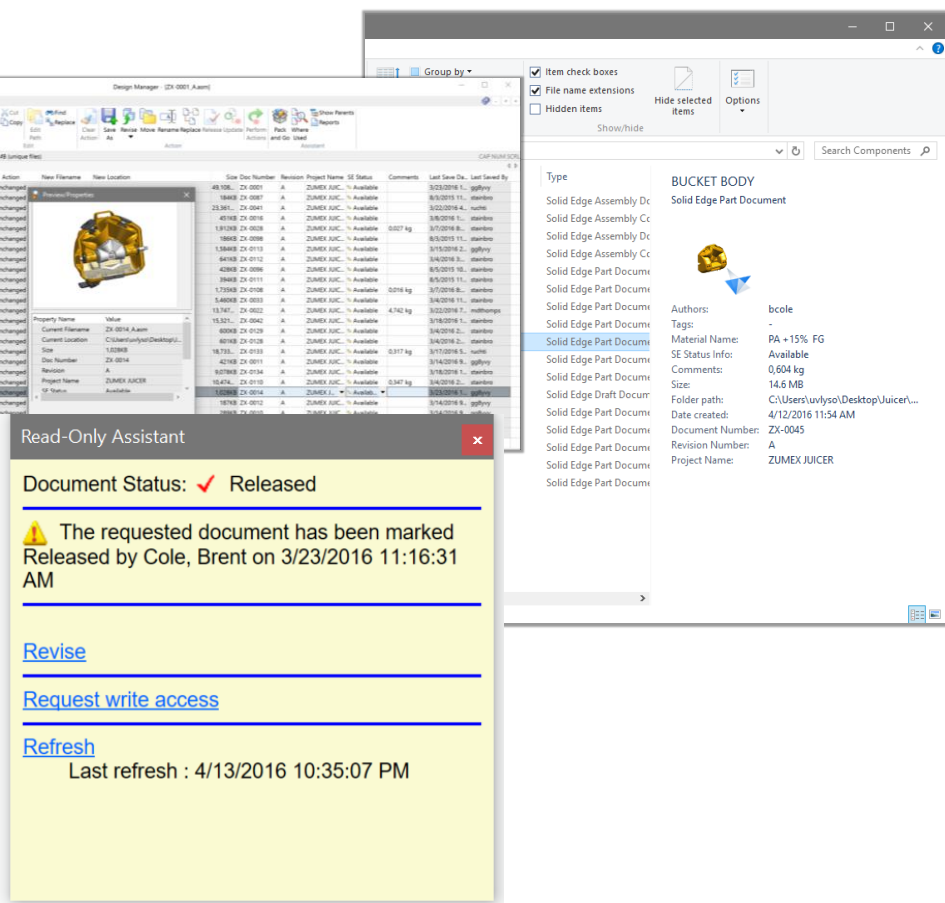
- Create new or reference part/sheet metal/sub-assemblies for final design
- For fresh data, drawings are created manually
- Project files may need to be revised
- Automatic drawing file revision if parent is revised
- File links to be maintained irrespective of top level file location/movement





# **Introducing: Solid Edge Built-in Data Management**

# Introducing: Solid Edge built-in data management (BiDM)



- Zero setup: No extra IT resources, no SQL, no databases
- Instant search for files:
  - Windows Explorer integrated searching
  - Search by any file property (Supplier, Revision, Material)
  - Where Used for impact analysis
- Organized data:
  - Protects against duplicate filenames
  - Document number generator
- Automated revisions, including associated drawings
- Revision and release management through Design Manager utility
- Pack and Go associated data (e.g. send to suppliers or customers)



## Introducing: Solid Edge built-in data management (BiDM)



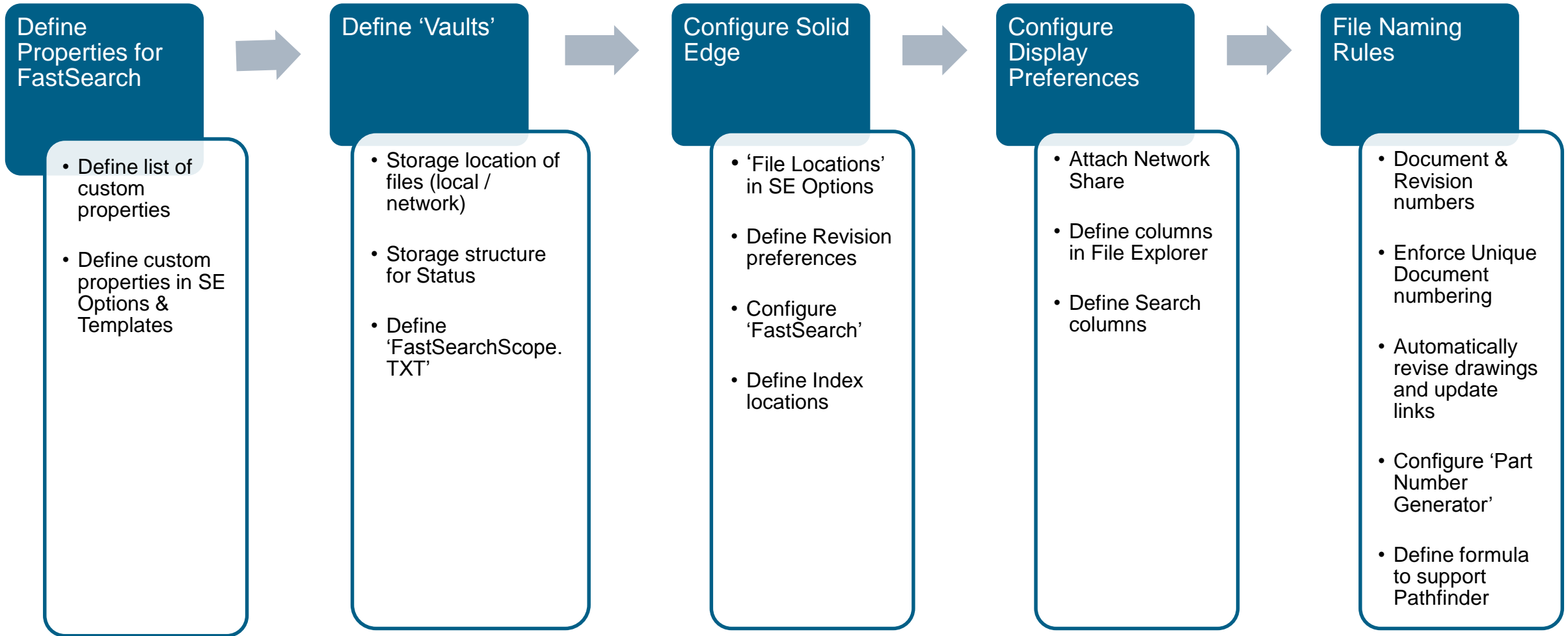
- Collaborate seamlessly with several sites using popular cloud storage services (e.g. Dropbox, One Drive, Google Drive, Box)
  - Changes at one site are synchronized with others
  - Automatic file locking at other sites during edits
  - Off-site data backup
- Works with existing local and network vaults also

## Benefits of biDM

- Fast Search
- Custom Properties
- Where Used & Save As/Revise
- Unique Document Numbers
- Duplicate Files
- Lifecycle Management

# Setting up BiDM in ST9

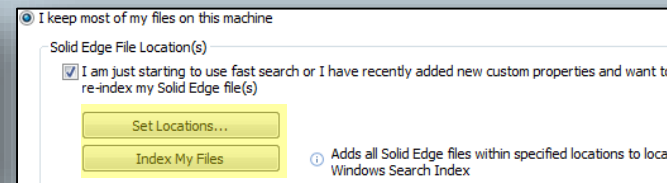
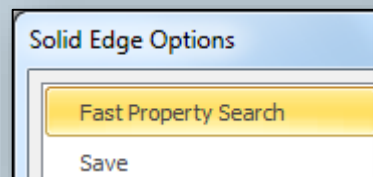
## Sequence of operations



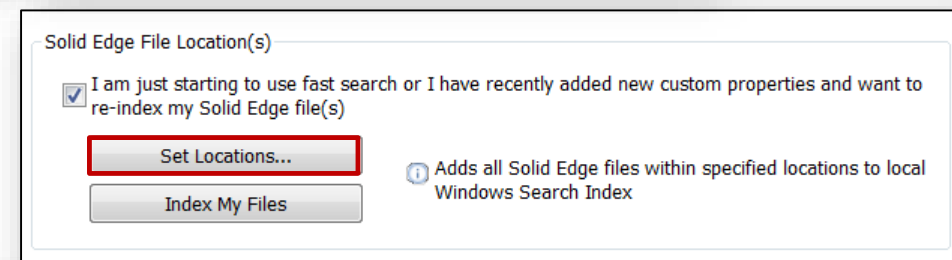


# Fast Search

- Easy and quick to setup
- Multiple folders across single/multiple machines can be defined
- Can be used for searching files within Solid Edge or Windows File Explorer
- Customized views in File Explorer for property columns
- Filter results using property columns
- Supports multiple-property based search



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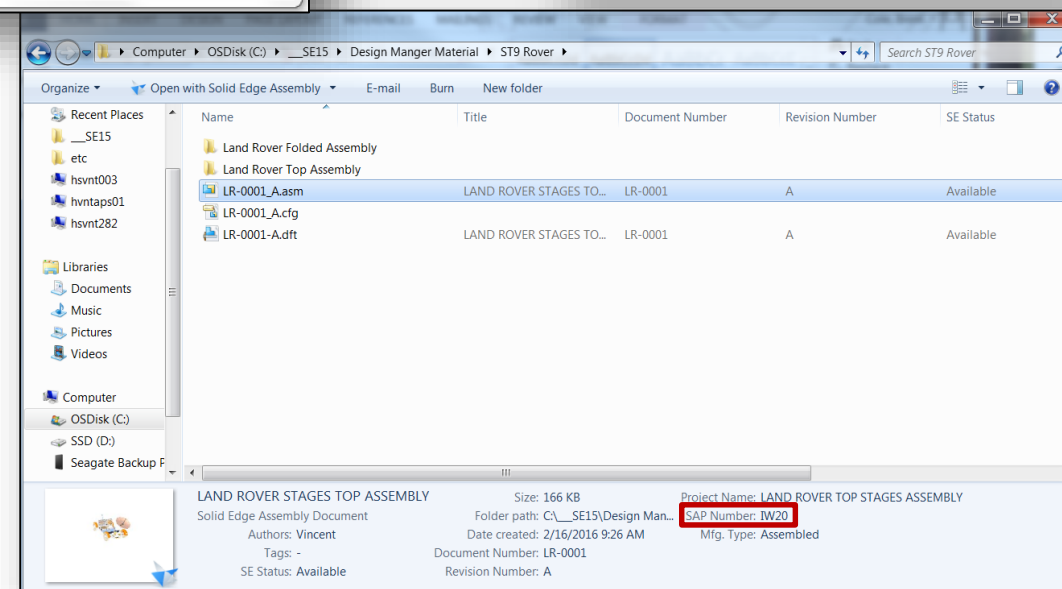
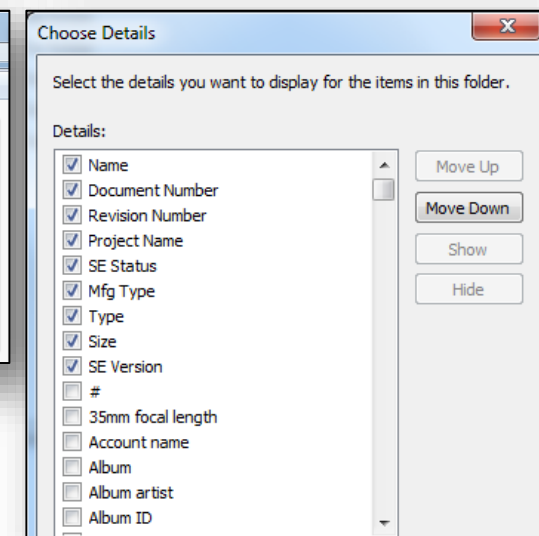
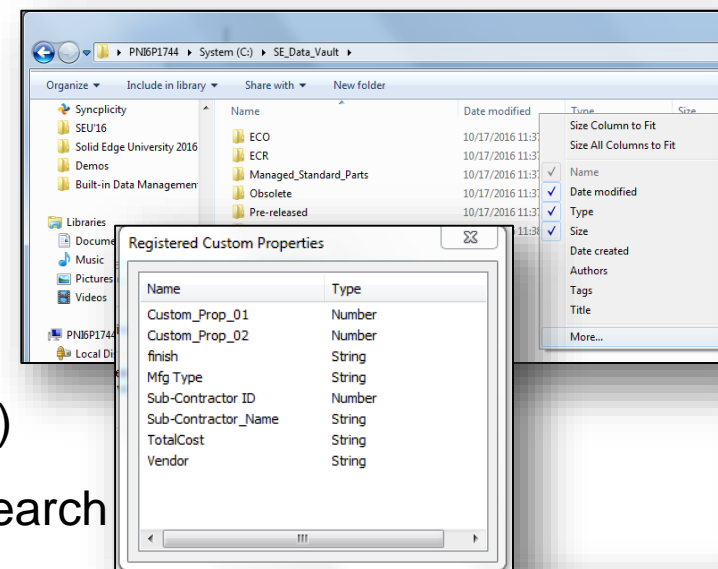
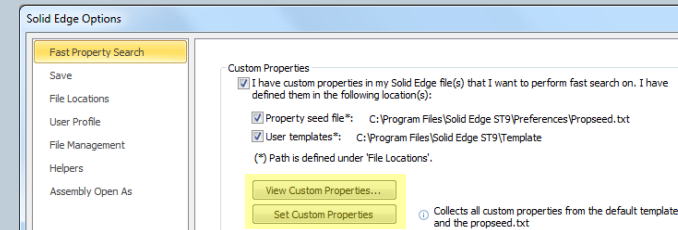


Name	Document Number	Revision Number	Folder	SE Status	SE Version	Mfg Type	Hardware
GB-00001_A.dft	GB-00001	A	Bushing (D:\D...	Released	109.00.00.084		
GB-00001_A.par	GB-00001	A	Bushing (D:\D...	Released	109.00.00.084	Turned	No
GB-00002_A.dft	GB-00002	A	Bushing (D:\D...	Released	109.00.00.084		
GB-00002_A.par	GB-00002	A	Bushing (D:\D...	Released	109.00.00.084	Turned	No
GB-00003_A.dft	GB-00003	A	Bushing (D:\D...	Released	109.00.00.085		
GB-00003_A.par	GB-00003	A	Bushing (D:\D...	Released	109.00.00.084	Turned	No
GB-00004_A.dft	GB-00004	A	Bushing (D:\D...	Released	109.00.00.085		

Name	Document Number	Revision Number	Title	SE Status	Mfg Type	Hardware Part	Vendor
GB-00001_A	GB-00001	A	Bushing 25 mm x 50 mm	Released			
GB-00001_A	GB-00001	A	Bushing 25 mm x 50 mm	Released	Turned	No	
GB-00002_A	GB-00002	A	Bushing 50 mm x 50 mm	Released		No	
GB-00002_A	GB-00002	A	Bushing 50 mm x 50 mm	Released	Turned	No	
GB-00003_A	GB-00003	A	Bushing 75 mm x 75 mm	Released		No	
GB-00003_A	GB-00003	A	Bushing 75 mm x 75 mm	Released	Turned	No	
GB-00004_A	GB-00004	A	Bushing 100 mm x 75 mm	Released		No	
GB-00004_A	GB-00004	A	Bushing 100 mm x 75 mm	Released	Turned	No	
GB-00005_A	GB-00005	A	Bushing 150 mm x 100 mm	Released		No	
GB-00005_A	GB-00005	A	Bushing 150 mm x 100 mm	Released	Turned	No	

# Custom Properties

- Extends scope of managing/searching for files
- No limit to number of properties being set
- Custom properties can be:
  - Template-based or
  - Universal (<install>\Preferences\propseed.TXT)
- Each custom attribute is available for use in FastSearch
- Support for multiple custom property search at once
- Quickly view custom properties in SE Options before deployment
- User Custom Properties can also be added to the info section of windows explorer
  - Gives the user a quick view of file properties



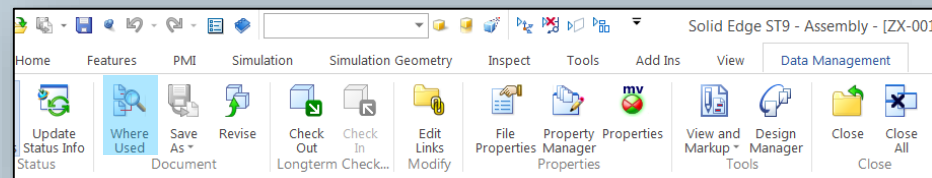
Let's take a look!

- Fast Search
- Custom Properties





# Where Used & Save As/Revise



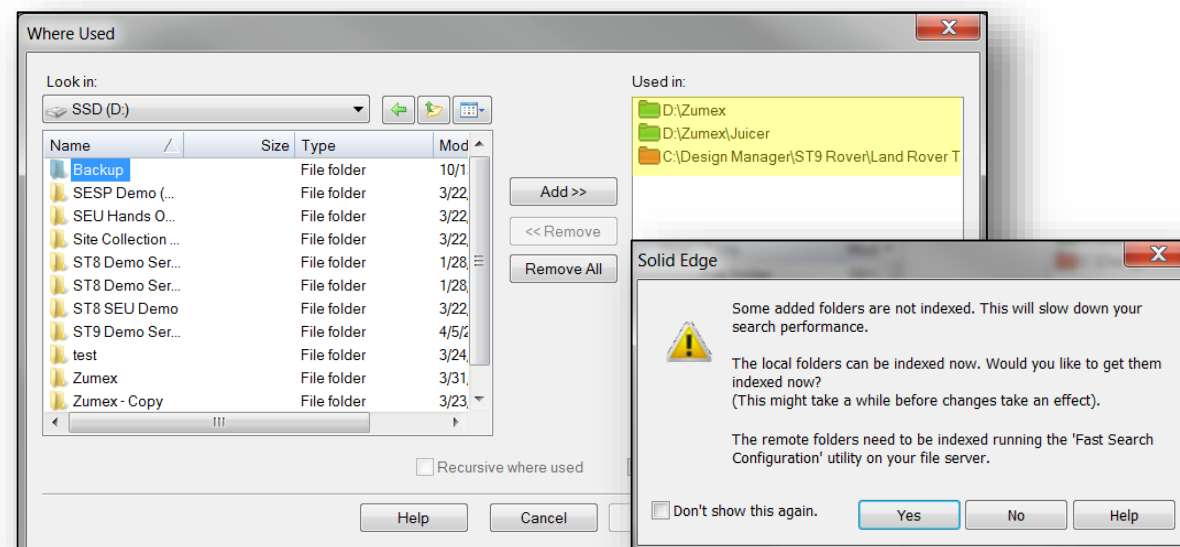
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## Where Used:

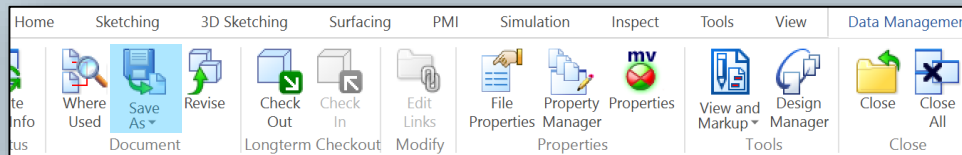
- Allows the user to see where else a file may be used
  - This could be in a draft file or another assembly
- Quick and is directly integrated in to Solid Edge under the data management tab
- First need to set the locations to search
  - Browse for the folders you want to look in and add them to the selection window
    - **Green folders** are indexed and will result in a fast search results
    - **Red folders** are not indexed and search results will be slower

Where Used Results

Filename	Last Sa...	Document Number	Revisio...	Project Name	Model ...	SEStatus	Comm...	Author	Manager	Last
ZX-0126_A.par	4/5/20...	ZX-0126	A	ZUMEX JUICER		Available	0,277 kg	bcole		gg8:
ZX-0013_A.asm	3/21/2...	ZX-0013	A	ZUMEX JUICER		Available		bcole		gg8:
ZX-0126_A.dft	4/5/20...	ZX-0126	A			Available		gg8yvy		gg8:



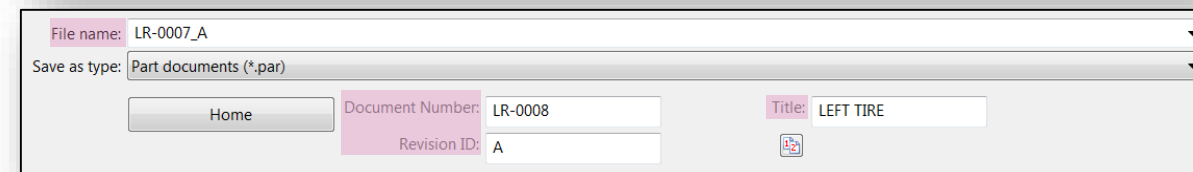
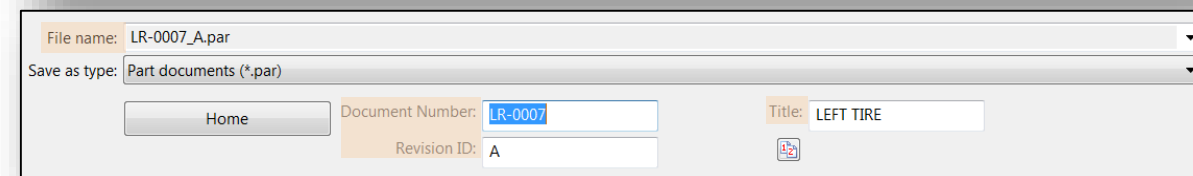
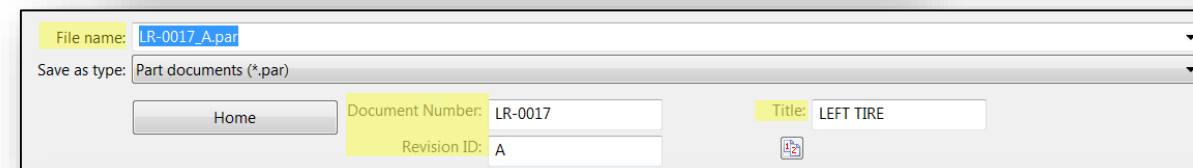
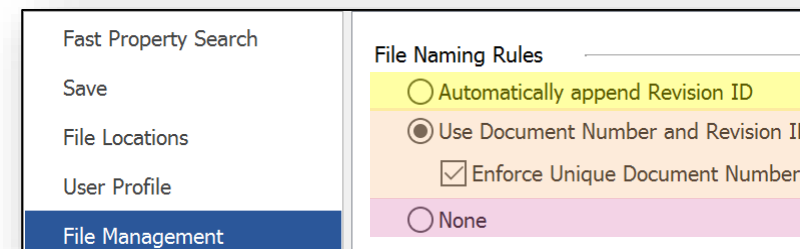
# Where Used & Save As/Revise



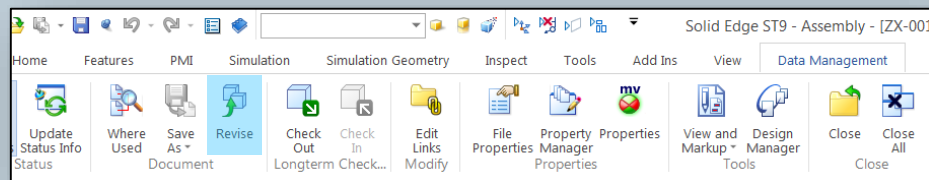
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## Save As / Revise:

- Out of the box with built in data management
- File Naming Rules available in three flavors
  - Automatically append revision ID to the end of the file name
  - Document Number box is pre-highlighted, any changes automatically update the File name
  - 'None' option removes all file naming rules



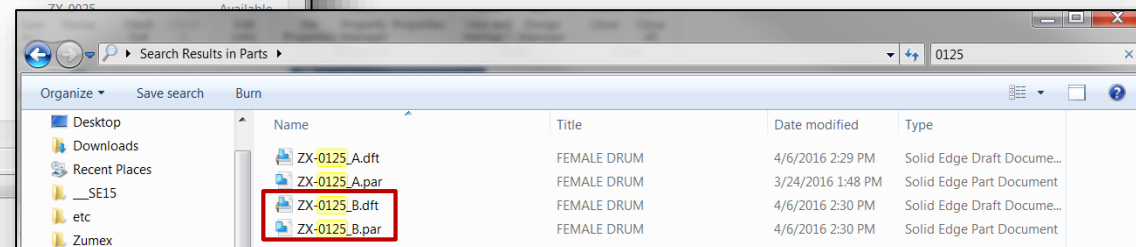
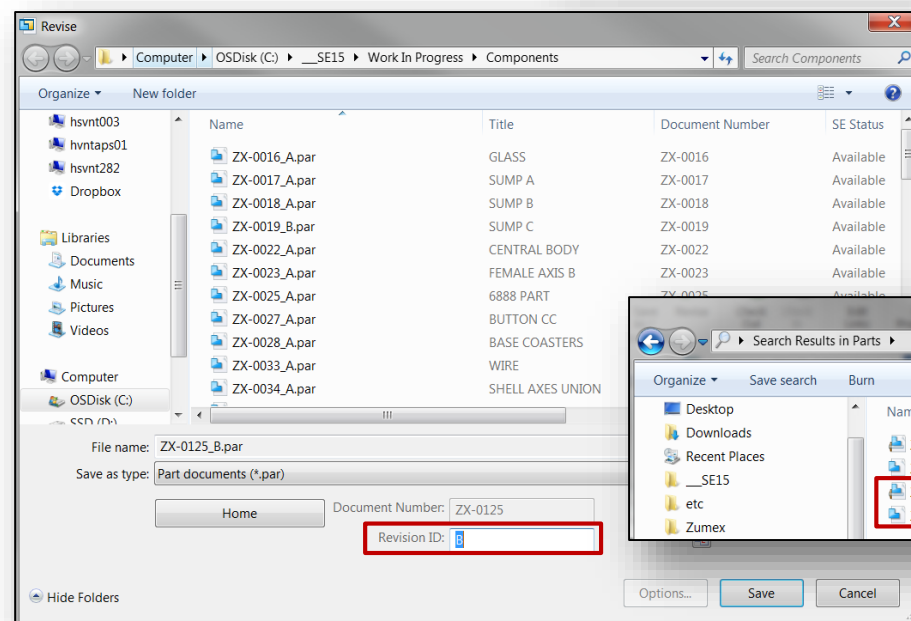
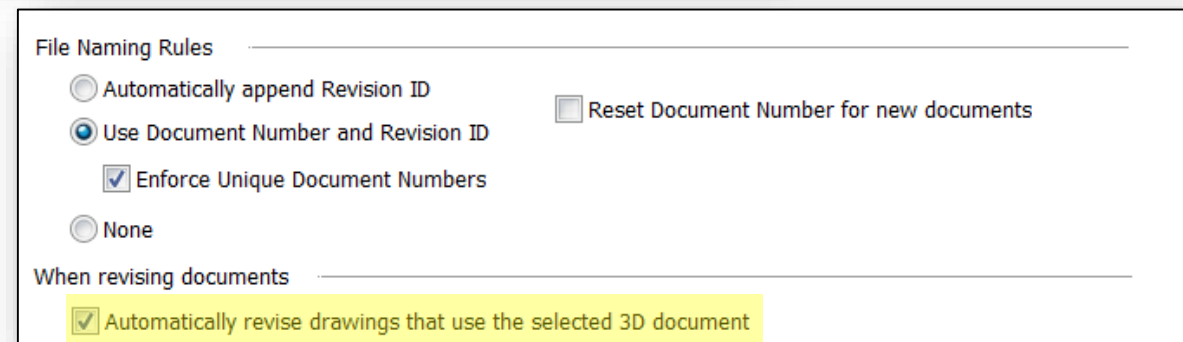
# Where Used & Save As/Revise



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## Revise:

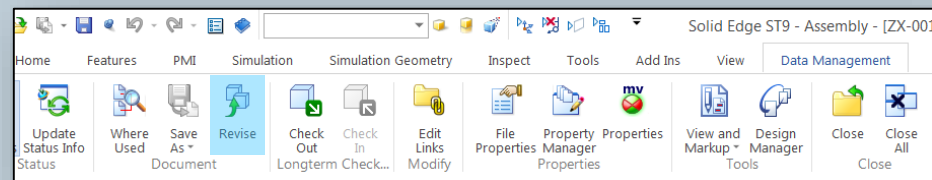
- Can easily perform a Revision from the Solid Edge Data Management tab
- When performing a Revise on a Solid Edge part document/assembly, the draft file will automatically revise as well





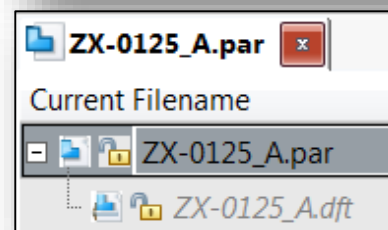
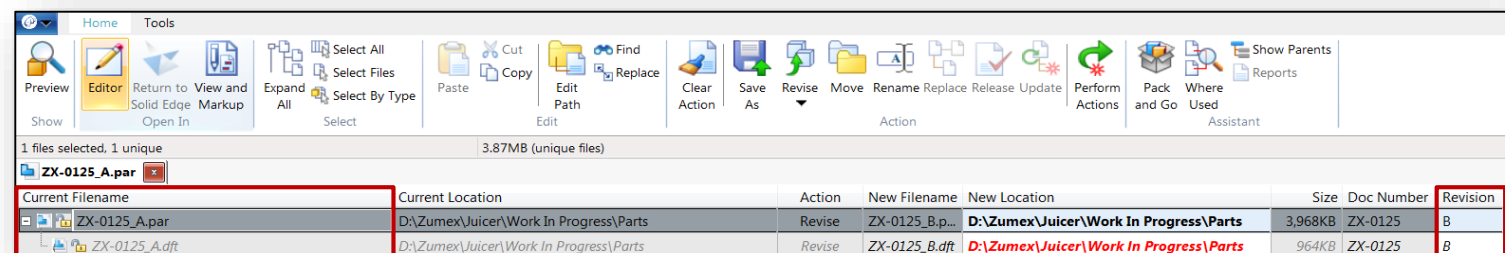
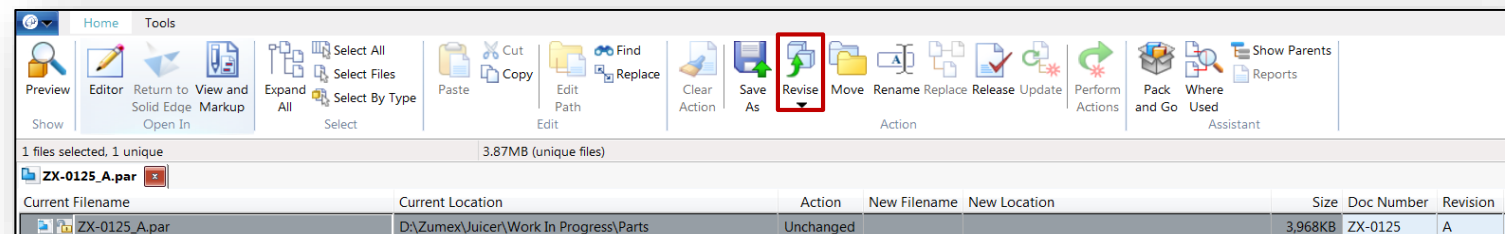
# Where Used & Save As/Revise

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## Revise:

- Can also be done in Design Manager
  - Simply open the file we want to revise
  - Select the file
  - Choose Revise
- When performing a revision in Design Manager the draft file is automatically added to the revise as well
- The revision ID is automatically changed from A to B on both the part and the related draft file



Doc Number	Revision
ZX-0125	B
ZX-0125	B

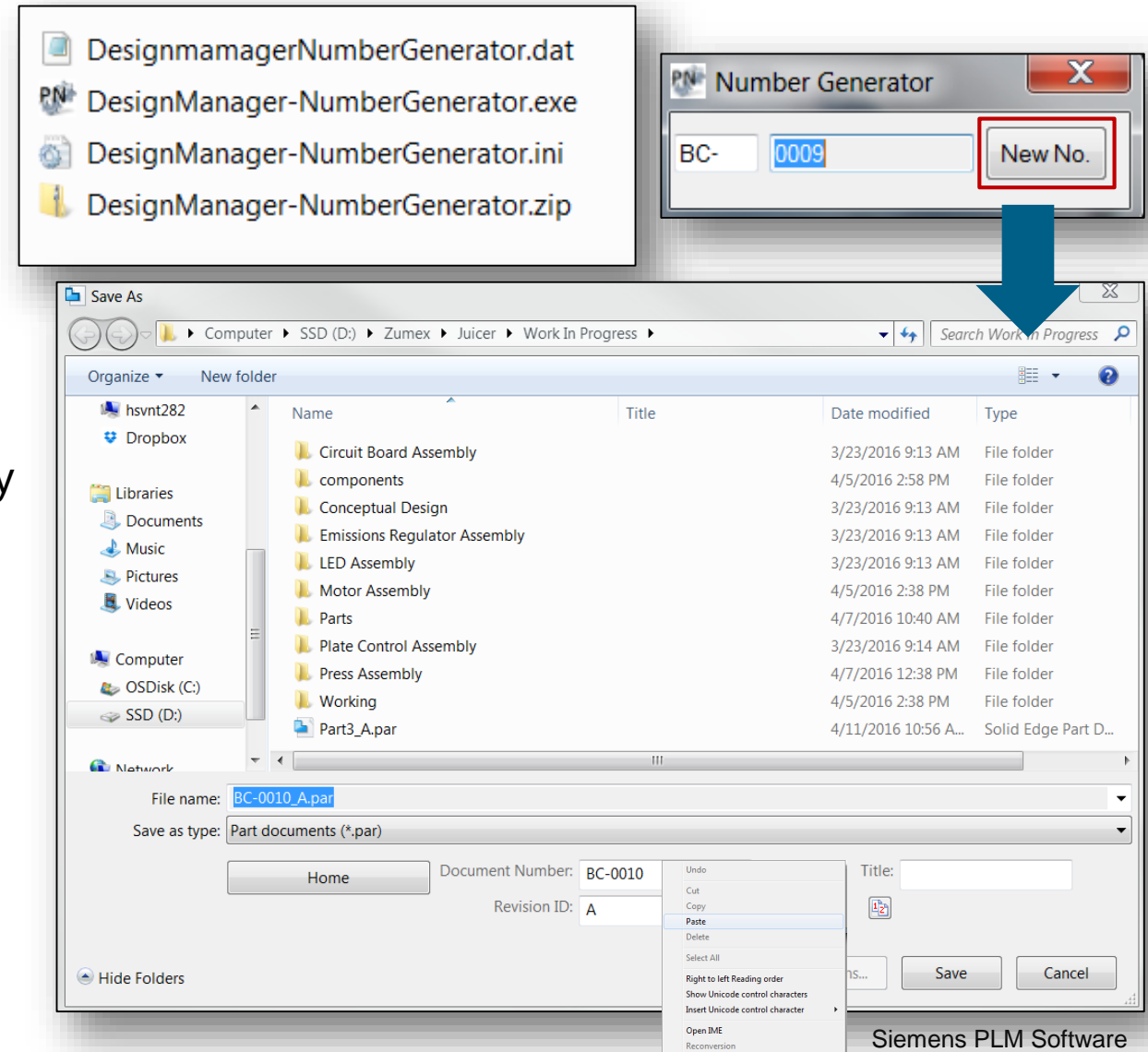
Let's take a look!

- Where-Used
- Save As
- Revise



# Unique Document Numbers

- Out of the box with built in data management
- Delivering a free tool for generating unique document numbers
- Located in <install>\Custom\NumberGenerator
- Enforce unique document numbers
- Set part numbering scheme and ensure that only unique document numbers are used
  - Mitigates duplicate document numbers
  - Ensures a consistent numbering scheme





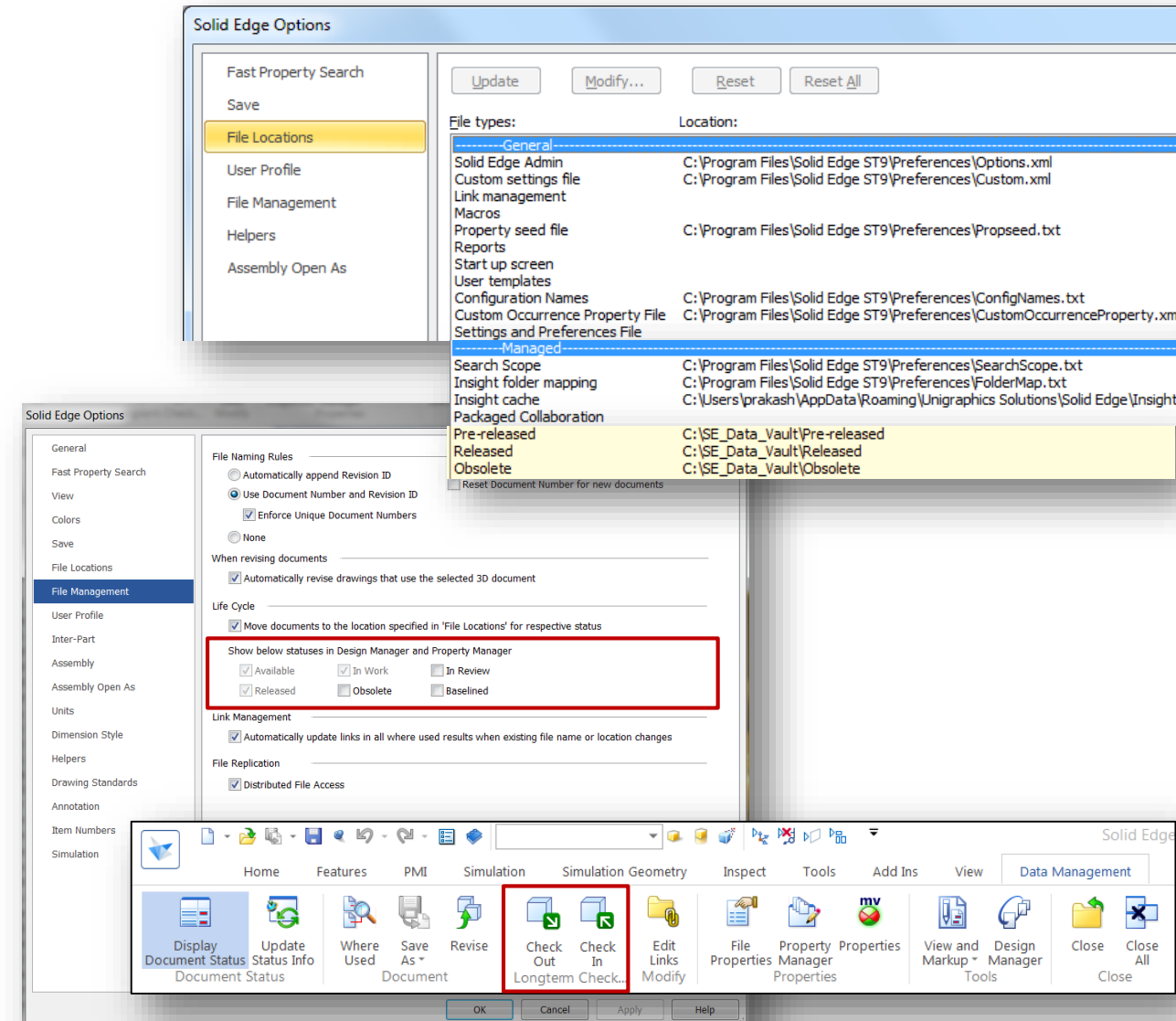
Let's take a look!

- Unique Document Numbering



# Life Cycle Management

- Additional status choices to be shown in Design Manager and Property Manager in Solid Edge options
  - In Review
  - Obsolete
  - Baseline
- Statuses of Available, In Work and Released are on by default and cannot be removed
- These statuses are key to life cycle management and allow users to fully control their files
- Check In/Check Out capabilities

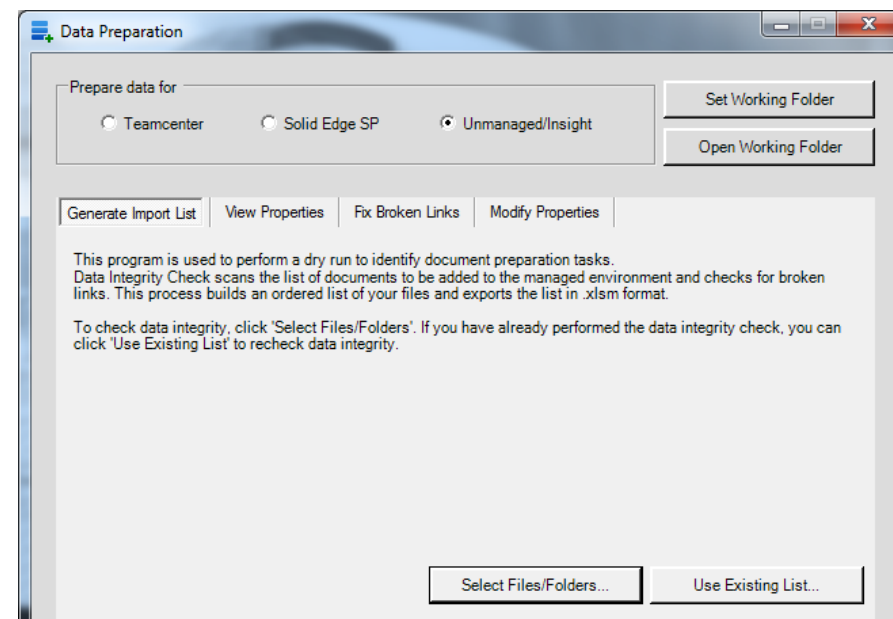


## “How do I adopt BiDM, where do I start?”

- Three methods:
  1. Setup BiDM for new data created in SE
  2. Data Preparation Tools
  3. Duplicate File locator (**NEW!** in ST9)

### Data Preparation Tools:



- Revamped for ease of use
- Recommended to run on an ‘as-required’ basis
- Can also be used for a ‘one-shot’ data cleanup



### Duplicate Files:

- Delivered out of the box  
(<install>\Program\DupFileReport
- Generates a log file for reviewing

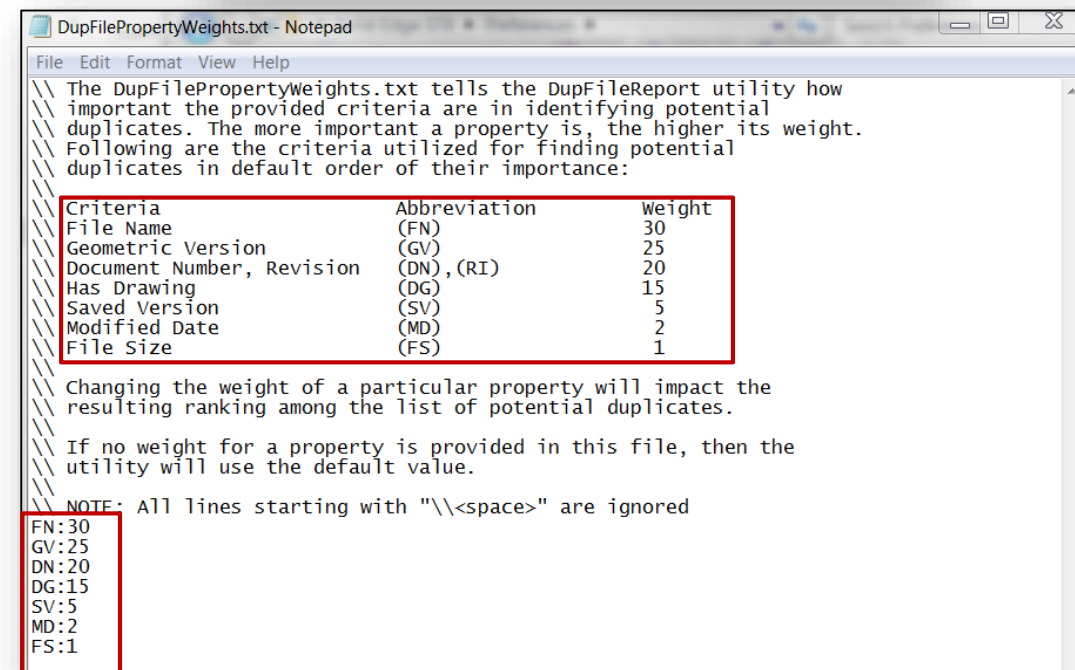
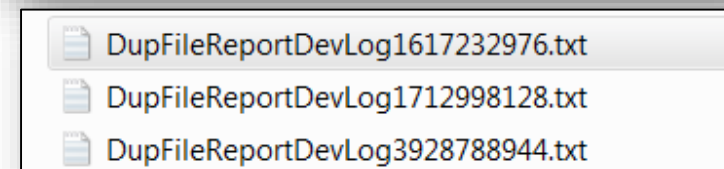
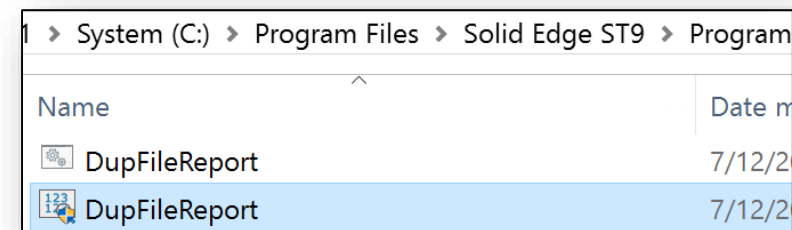
1 > System (C:) > Program Files > Solid Edge ST9 > Program

Name	Date modified
 DupFileReport	7/12/2016
 DupFileReport	7/12/2016

# “How do I adopt BiDM, where do I start?”

## Duplicate Files:

- Delivered out of the box  
(<install>\Program\DupFileReport
- Generates a log file for review
- Criteria can be edited dependent on what information the user finds most important
- Ability to see if a file has a drawing is a powerful tool





# “How do I adopt BiDM, where do I start?”

## Duplicate File Report

- The resulting file will be in excel format giving you the ability to sort by column and more easily format your data

File Name	Size	Document Number	RevID	GeometryMatch	HasDrawing	Modified Date
D:\ME\Products\PDM\SE15\SampleParts_indexed\Iron_Eagle_New\SE_Files\PAR_03_00187.par	249856	PRT-00277	A			2012/02/22:00:1
D:\ME\Products\PDM\SE15\SampleParts_indexed\Iron_Eagle_New\SE_Files\PAR_03_00190.par	247808	PRT-00278	A			2012/03/07:15:0
D:\ME\Products\PDM\SE15\SampleParts_indexed\Iron_Eagle_New\SE_Files\PAR_03_00193.par	238080	PRT-00279	A			2012/02/22:00:1
D:\ME\Products\PDM\SE15\SampleParts_indexed\Iron_Eagle_New\SE_Files\PAR_03_00196.par	183808	PRT-00280	A			2012/03/07:14:1
D:\ME\Products\PDM\SE15\SampleParts_indexed\Iron_Eagle_New\SE_Files\ASM_01_00009.asm	307712	PRT-00281	-	Yes	0	2012/02/21:23:2
D:\ME\Products\PDM\SE15\SampleParts_indexed\Iron_Eagle_New\SE_Files\PAR_03_00201.par	189440	PRT-00281	A			2012/03/07:14:1
D:\ME\Products\PDM\SE15\SampleParts_indexed\Iron_Eagle_New\ba\SE_Files\ASM_02_00010.asm	293888	PRT-00282	-	Yes	0	2012/02/21:23:2
D:\ME\Products\PDM\SE15\SampleParts_indexed\Iron_Eagle_New\SE_Files\PAR_03_00214.par	190464	PRT-00282	A			2012/03/07:15:0
D:\ME\Products\PDM\SE15\SampleParts_indexed\Iron_Eagle_New\ba\SE_Files\ASM_02_00011.asm	476672	PRT-00283	-	Yes	0	2012/02/22:00:1
D:\ME\Products\PDM\SE15\SampleParts_indexed\Iron_Eagle_New\SE_Files\PAR_03_00222.par	274944	PRT-00283	A			2012/03/07:15:0
D:\ME\Products\PDM\SE15\SampleParts_indexed\Iron_Eagle_New\ba\SE_Files\ASM_02_00015.asm	218624	PRT-00284	-	Yes	0	2012/02/22:00:1
D:\ME\Products\PDM\SE15\SampleParts_indexed\Iron_Eagle_New\SE_Files\PAR_03_00229.par	251392	PRT-00284	A			2012/03/07:15:0
D:\ME\Products\PDM\SE15\SampleParts_indexed\Iron_Eagle_New\ba\SE_Files\ASM_02_00016.asm	167424	PRT-00285	-	Yes	0	2012/02/22:00:1
D:\ME\Products\PDM\SE15\SampleParts_indexed\Iron_Eagle_New\SE_Files\PAR_03_00234.par	261120	PRT-00285	A			2012/03/07:15:0
D:\ME\Products\PDM\SE15\SampleParts_indexed\Iron_Eagle_New\ba\SE_Files\ASM_02_00026.asm	269312	PRT-00286	-	Yes	0	2012/02/22:00:1
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D:\ME\Products\PDM\SE15\SampleParts_indexed\Iron_Eagle_New\ba\SE_Files\ASM_02_00027.asm	179712	PRT-00287	-	Yes	0	2012/02/21:23:3
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D:\ME\Products\PDM\SE15\SampleParts_indexed\Iron_Eagle_New\SE_Files\PAR_03_00600.par	264192	PRT-00288	A			2012/03/07:14:1
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D:\ME\Products\PDM\SE15\SampleParts_indexed\Iron_Eagle_New\ba\SE_Files\ASM_02_00033.asm	214016	PRT-00290	-	Yes	0	2012/03/07:14:2
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D:\ME\Products\PDM\SE15\SampleParts_indexed\Iron_Eagle_New\ba\SE_Files\PAR_01_00312.par	530944	PRT-00297	-	Yes	0	2012/03/07:14:2
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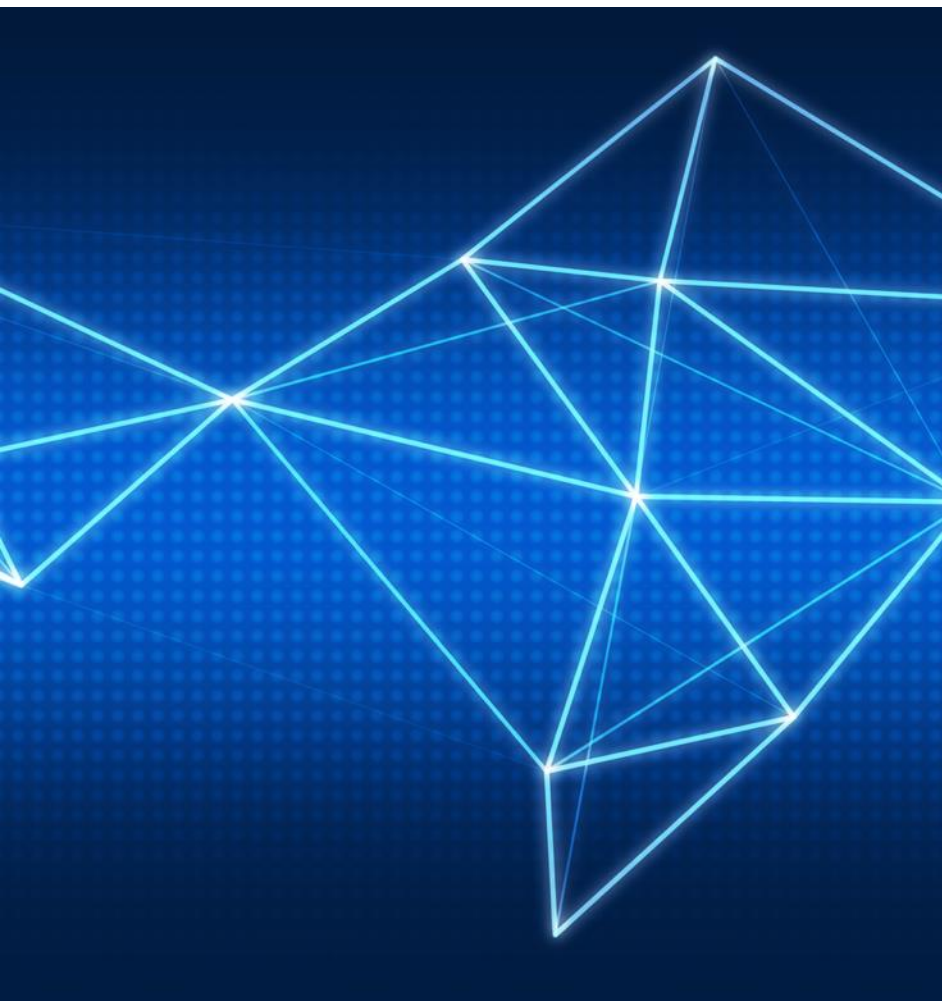
## Summary

- Fast Search
- Custom Properties
- Fast Where Used
- Save As/Revise
- Unique Document Numbers
- Duplicate Files
- Lifecycle Management

Thank You

**SIEMENS**





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