

How-to: SolidWorks New User Settings

By: Jim Krivoshein

Goal: List settings that should be changed or confirmed to assist new users to SolidWorks. Document what I usually have students change during my classes to make our class go smoother and the learning easier. Provide a reference for my students should they wish to change their machines back at work or home to be like the one they used in class.

Background: When teaching SolidWorks to new users it's been easier to change a few things to streamline the learning process. SolidWorks has a lot of customization capability and most users customize the interface to their liking. The following is the items I've found helpful in SolidWorks Essentials classes I've taught to both teach how to use as well as to customize SolidWorks and it's helped the learning process also.

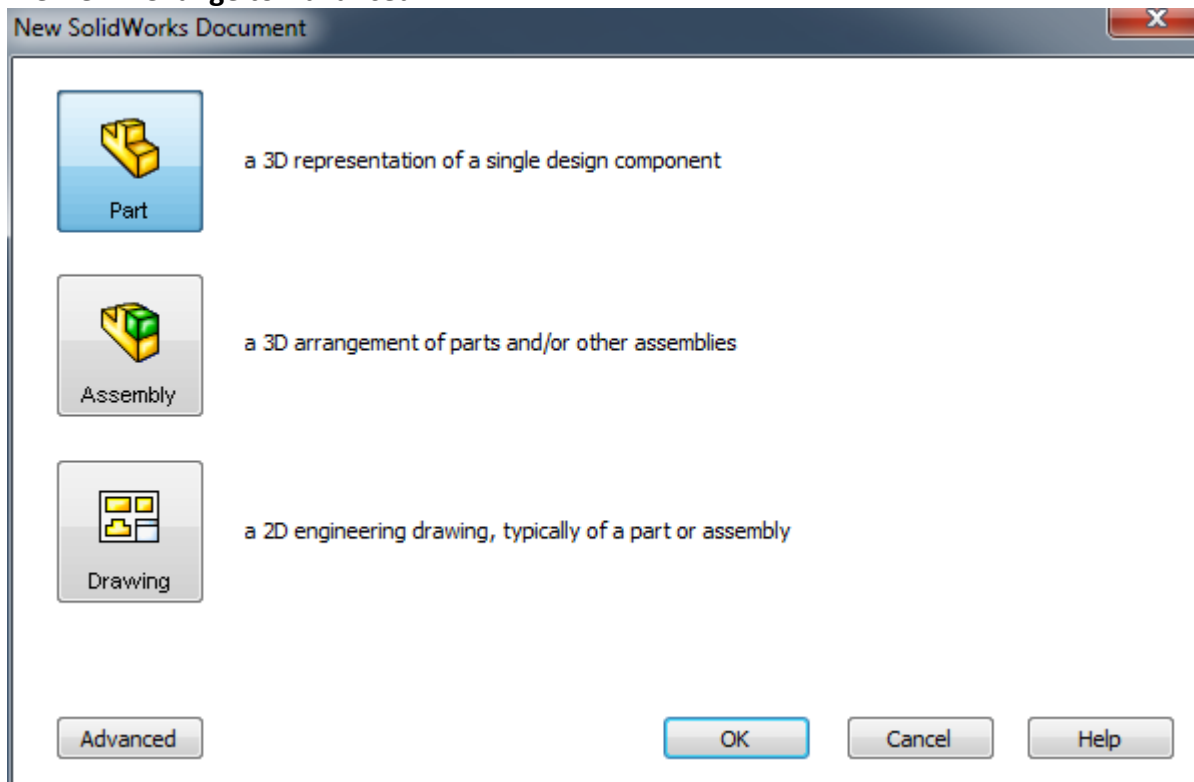
Setup:

Assuming you've just installed SolidWorks (2013) without any previous installations of SolidWorks and using the out-of-the-box settings. Also, the Copy Settings Wizard hasn't been used to restore/set any options. For this blog I've reset my registry, allowing SolidWorks to recreate those out-of-the-box settings.

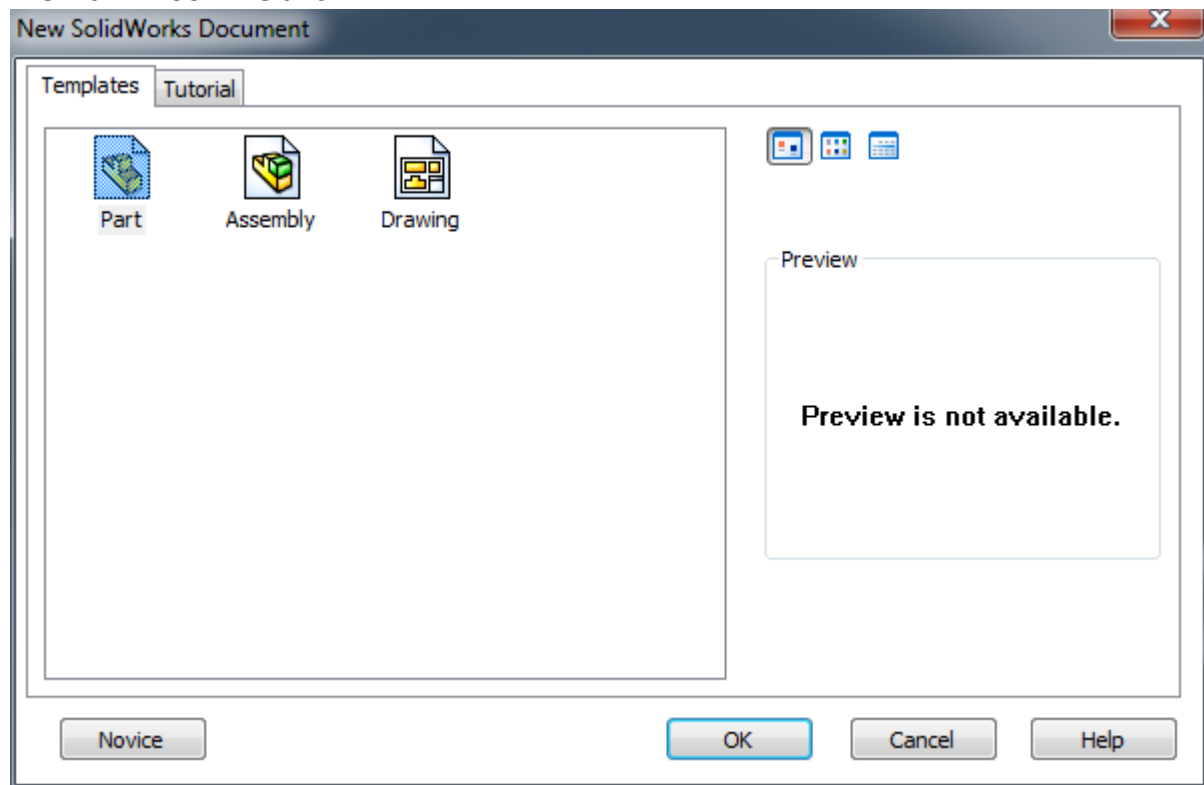
Note: Many savvy SolidWorks installers have a Copy Settings Wizard file they restore immediately after installing SolidWorks to get the "company standards" setup commonly and consistently and this should continue. The following changes and checks are supplemental with the "company standards" being most important. Few of these items are likely to contradict company standards in a significant way, except for number 10 Default Templates. Company templates should always be used for company work.

The List In Pictures:

1. File New - Change to Advanced

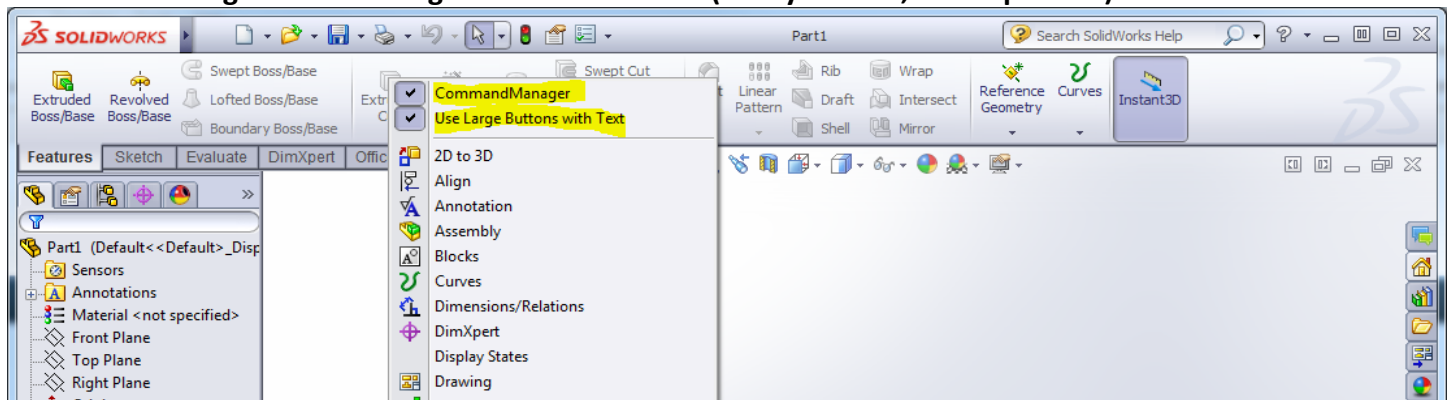


- a. Then it will look like this



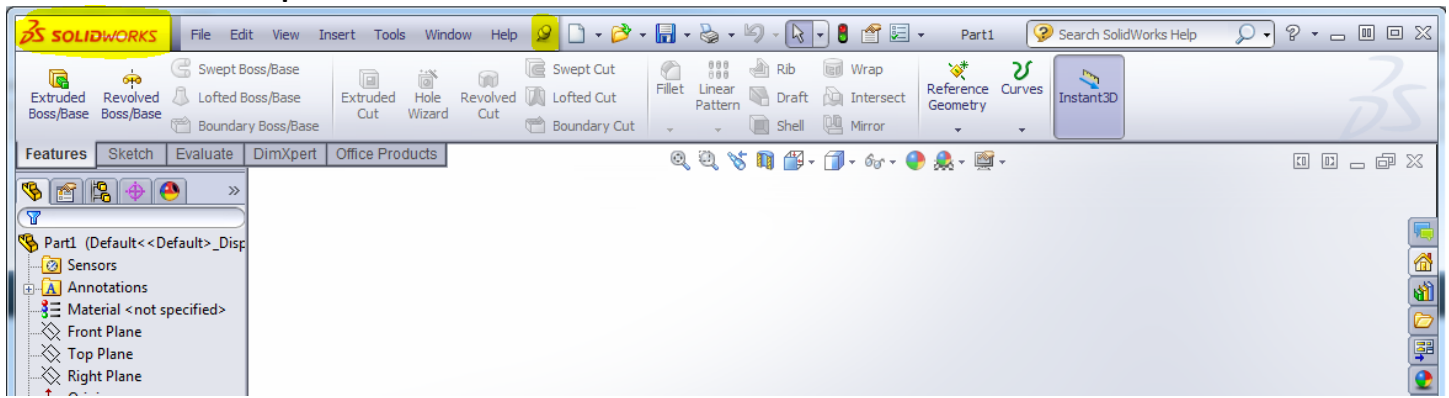
- b. **WHY?** - Users should be aware of multiple templates. From training templates, tutorial to company templates and the importance of using the correct templates for company work. With this change they are much more likely to understand that.

2. Command Manager and Use Large Buttons with Text (On by default, but important)



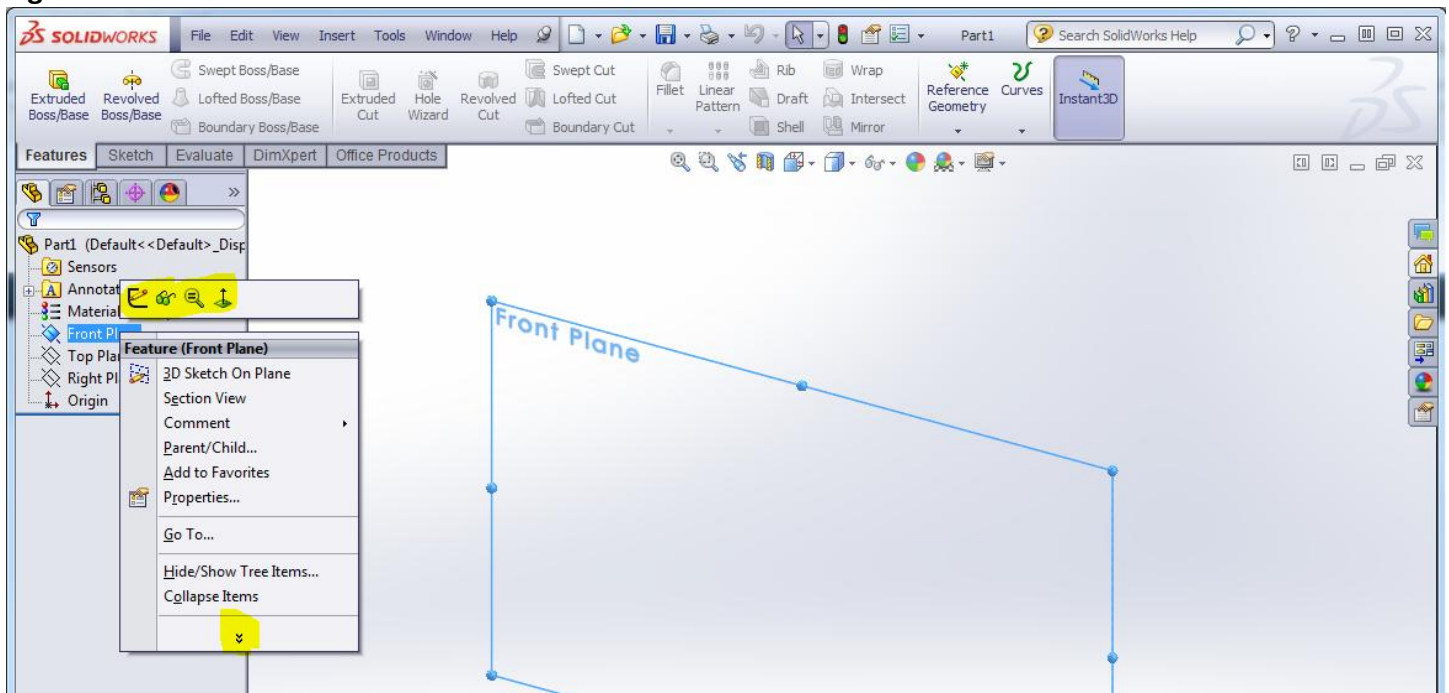
- a. Right click on an icon to see the dropdown menu pictured above.
- b. **WHY?** - Icons with words help new users to learn what each icon means, very helpful.

3. The Menu should be pinned

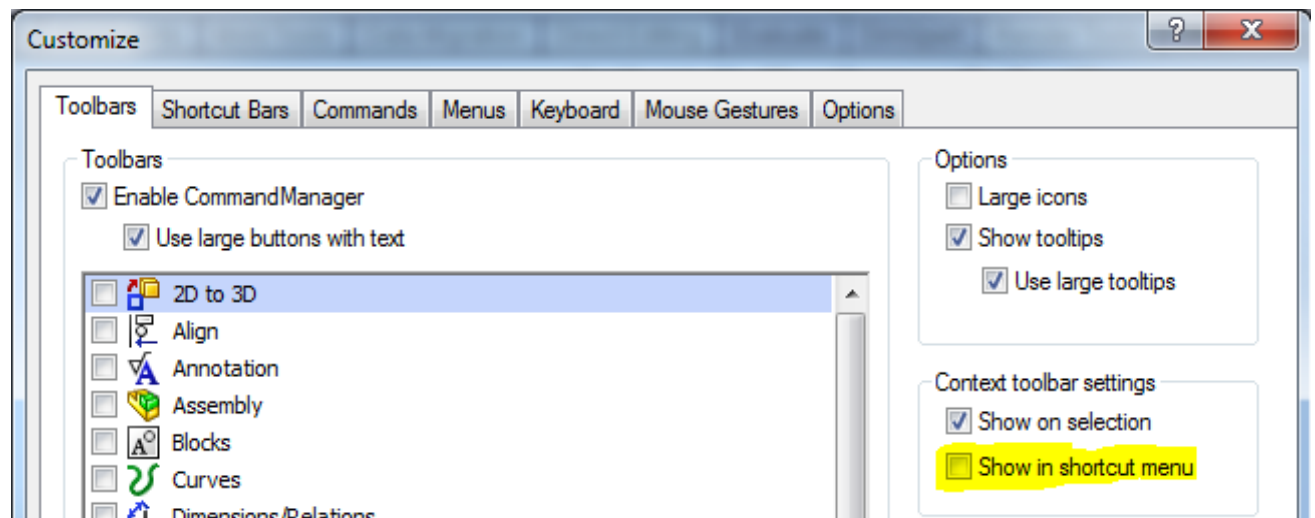


- The menu is normally hidden under the SolidWorks logo in the upper left corner. Carefully mouse across the menu row and select the pin.
- WHY? - To keep it visible and easier to find and navigate when needed.

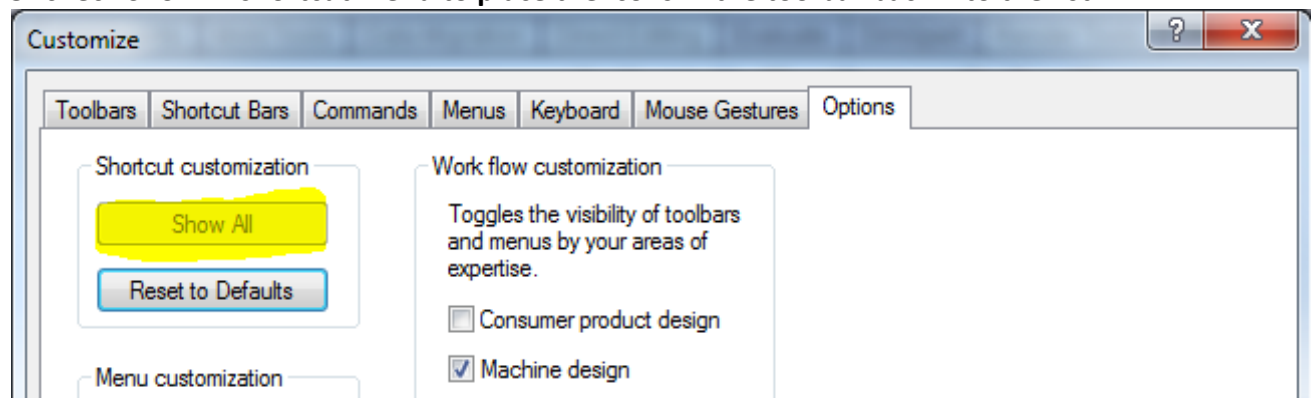
4. Right Click Menu has an icon bar of common tools without text and the menu is shortened.



- WHY? - The top tool bar doesn't have the text for these most common tools. It's nicer to find them in the list like all the other items.
- WHY? - The double arrows at the bottom of the list will allow one to see the hidden items, however it adds items to these menus throughout the list, not just at the bottom so one has to scan the entire full list all over. It'd be nicer to see it all at once.
- How? - Use the Tools, Customize menu to get to the next picture.

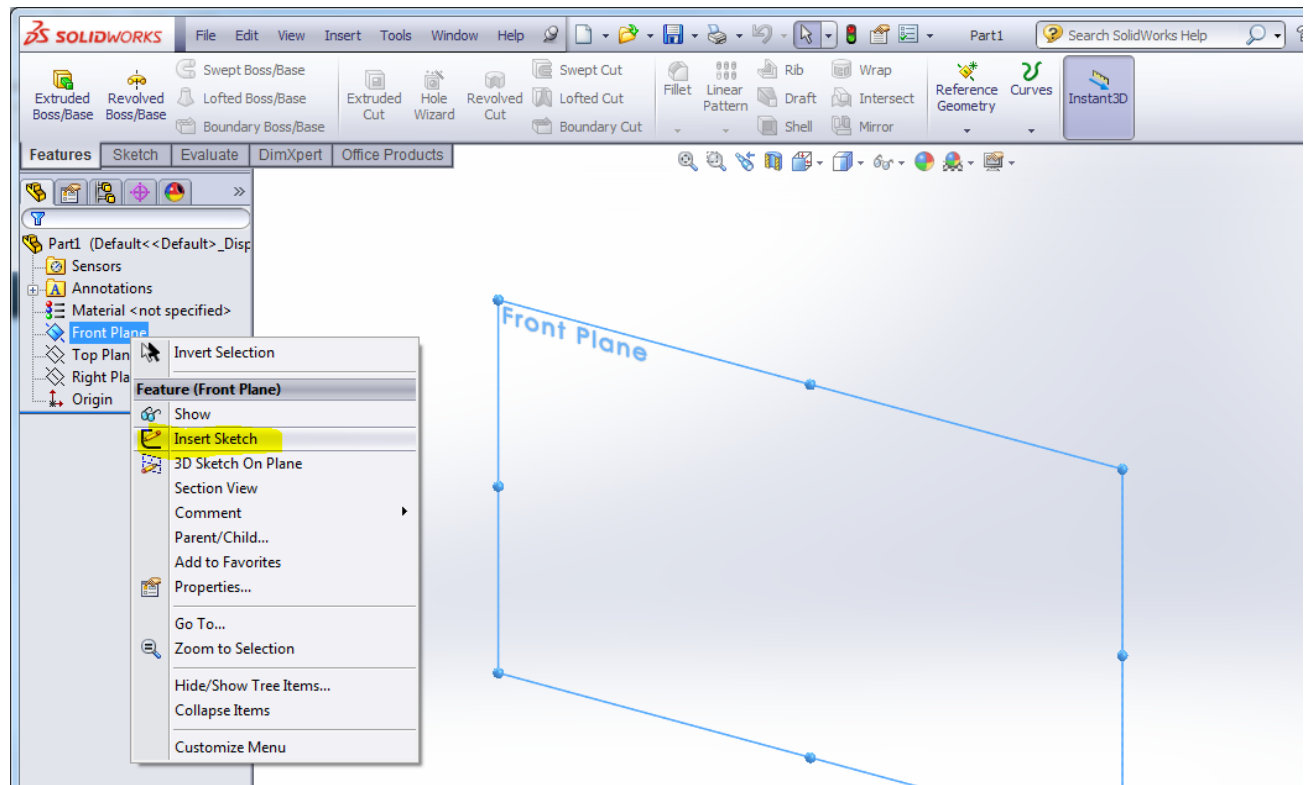


- d. Uncheck **Show in shortcut menu** to place the icons in the toolbar back into the list.

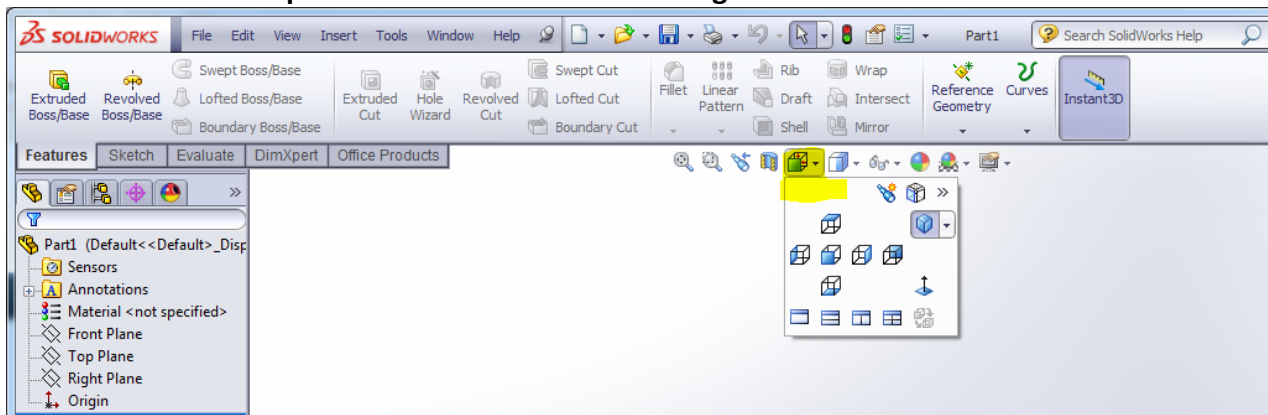


- e. Then select the **Options** tab and pick **Show All** under **Shortcut customization**.
- f. **WHY?** - This way the right click menu list will not have the double arrows hiding items. They'll all be in the list right away. Otherwise I hear students say "I don't have that in my menu." See the

results below.

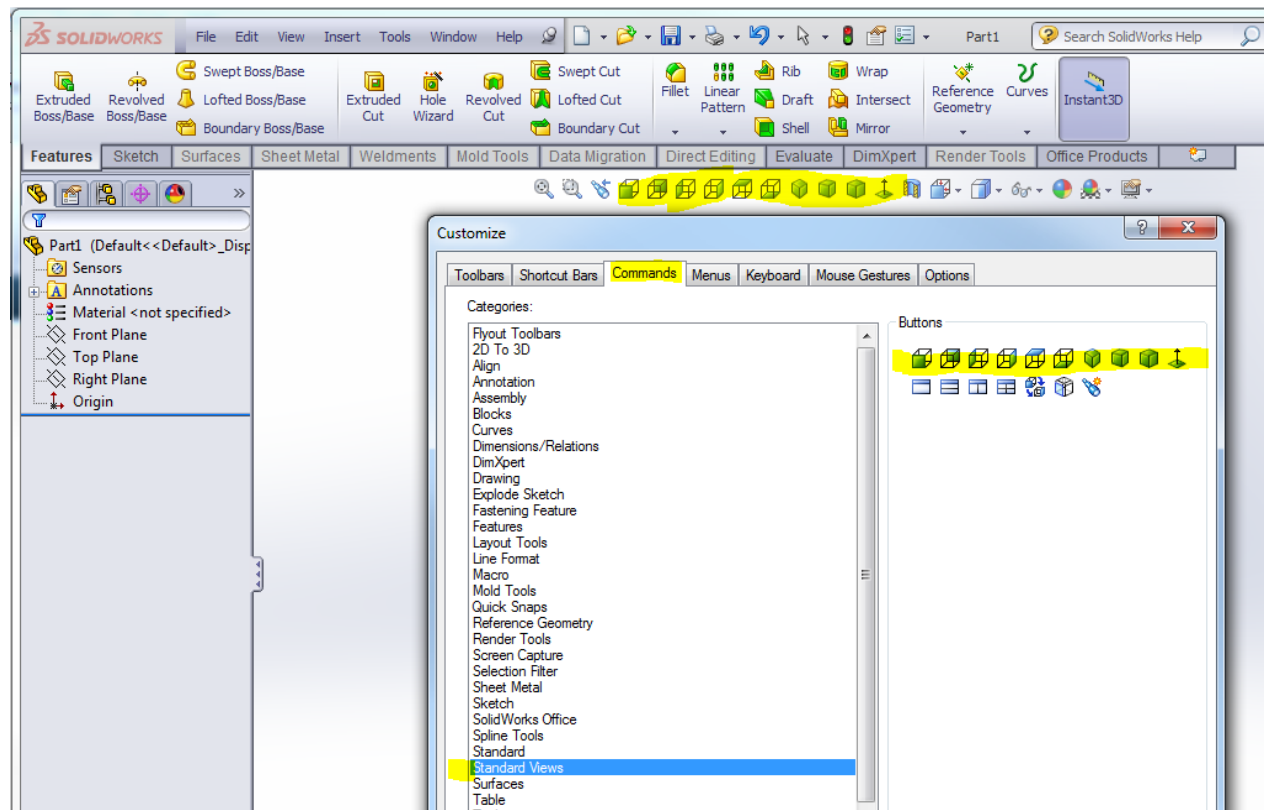


5. View Orientation Dropdown on the dashboard - Change to individual icons.



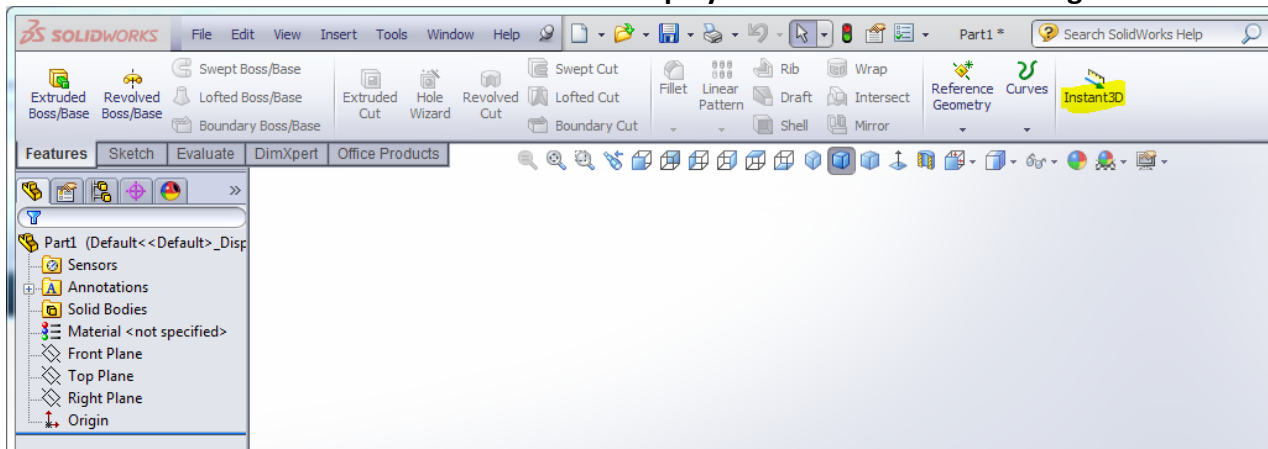
- WHY?** - We're frequently changing view orientation and navigating the dropdown requires fine mouse control. Having individual icons speeds things up.
- HOW?** - From the menu pick Tools, Customize, then the Command tab and Standard Views category. Then drag and drop the first row of icons (one at a time, sorry) onto the dashboard.

c. See results blow.



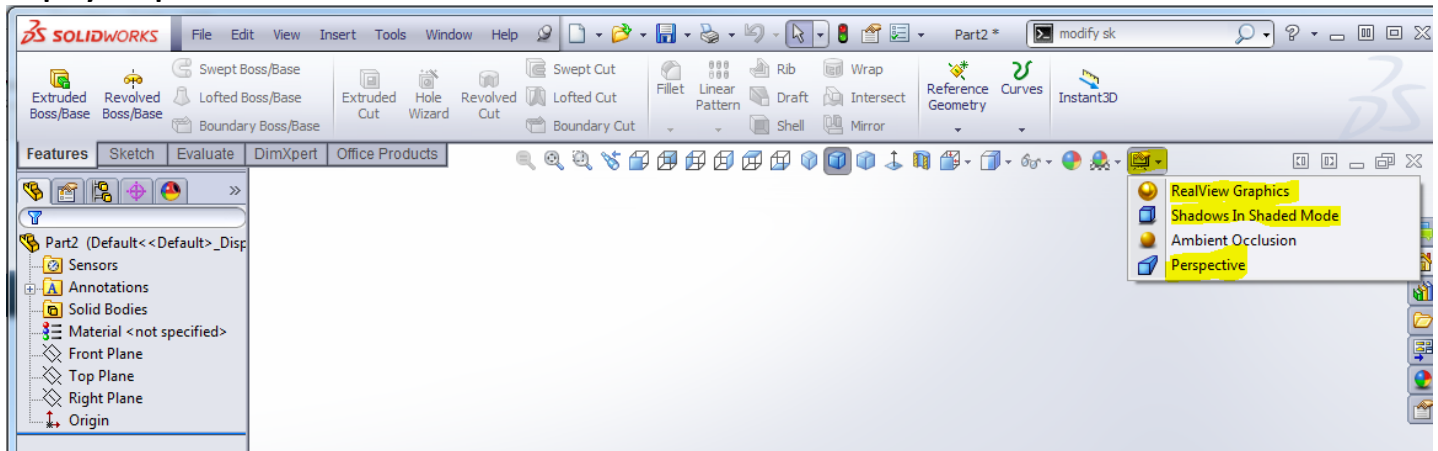
- d. I also like the Zoom to Selection Icon. Just switch to the View category and drag it's icon out also.
- e. WHY? - When selecting items in the graphics area or Feature Manager tree you can zoom to that item. Note: This is available on the pop up toolbar on selection "if" you go to that popup toolbar right away before it disappears.

6. Instant 3D - This is an awesome tool that has a display side effect that's confusing so I turn it off.



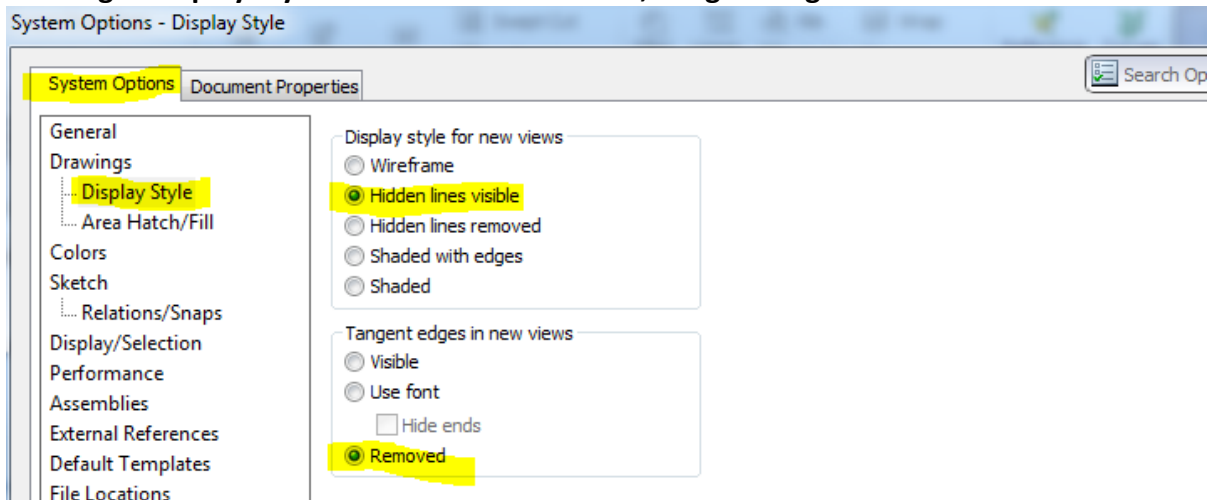
- a. WHY? - For those who take the time to understand the capability of the tool it's very handy. However, for new users when editing and existing sketch and seeing the preview of the feature at the same time is confusing. With Instant 3D turned off, one won't see the preview of the existing feature while editing that features sketch.

7. Display Dropdown Items - Turn them all off to start.



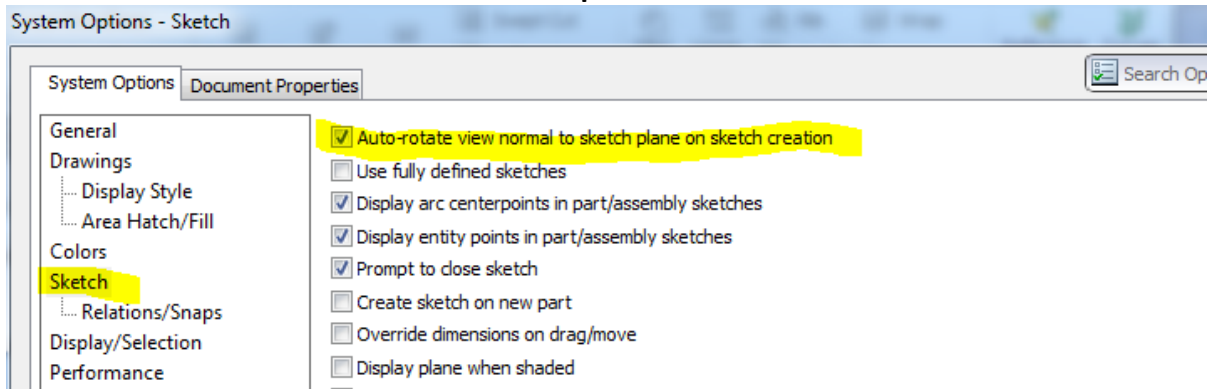
- a. **WHY?** - Users can become focused on the realism of the display. The shadows can cause blurring of bottom edge detail. Perspective is only for displaying, if you try to modify dimensions by double clicking on a feature while in perspective, the dimensions display oddly. The model is in perspective but the dimensions don't display in perspective as they normally would.

8. Drawings - Display Style = Hidden lines removed, Tangent edges Removed.



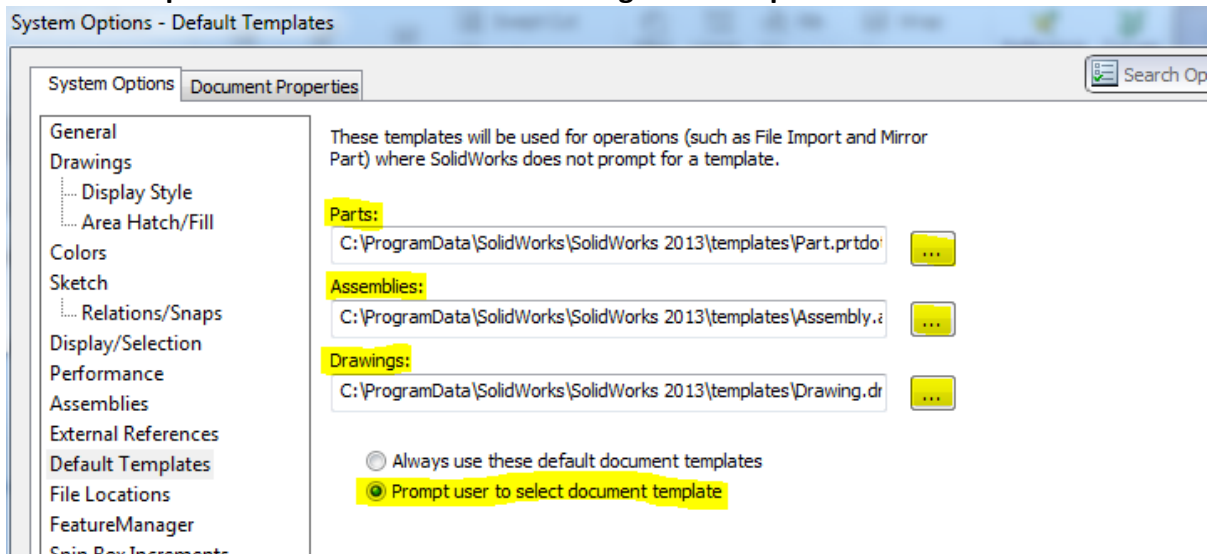
- a. **WHY?** - Most new users expect to see hidden lines when they make their first drawing views. The tangent edges tend to confuse orthographic views. They generally only make sense for an isometric view which can be turned on selectively. Conversely, Tangent edges don't follow any parent child relationships between views so each view would need to have them removed manually if this is set to Visible or Use font.

9. Sketch - Auto-rotate view normal to sketch plan on sketch creation.



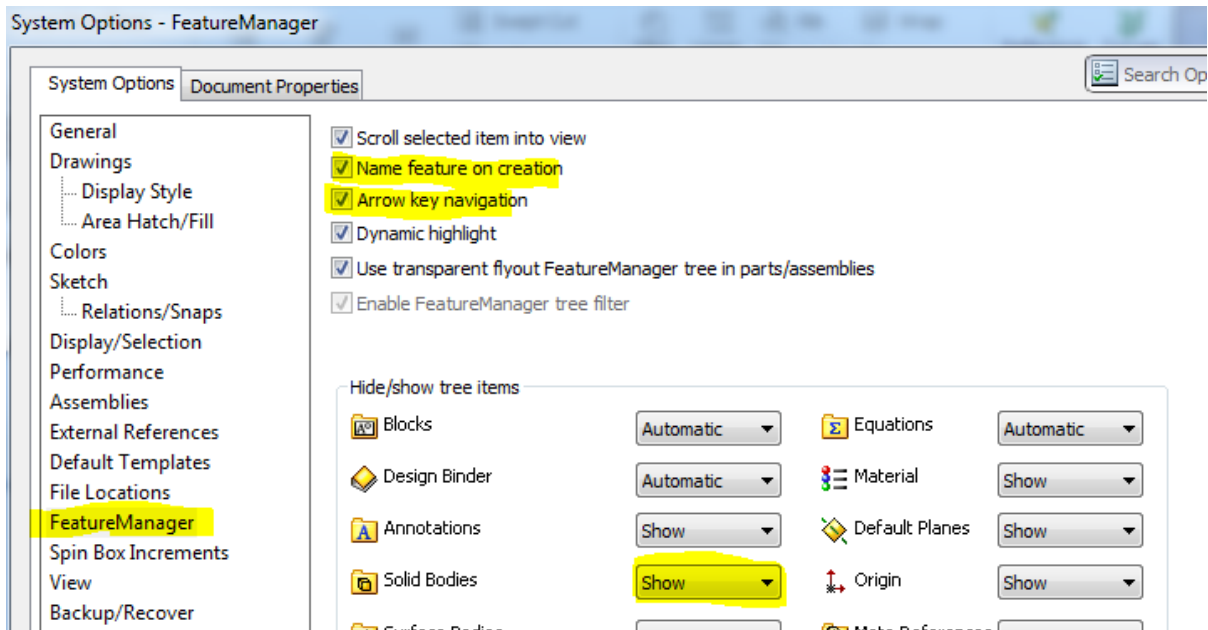
- a. **WHY?** - Here is one I keep wanting to add in my classes and don't. Since we frequently want to be normal to the sketch plane, it can be nice if SolidWorks automatically selects View Normal for us rather than with just the first new sketch in a part.

10. Default Templates - Should be set to something and Prompt user to select should be on.



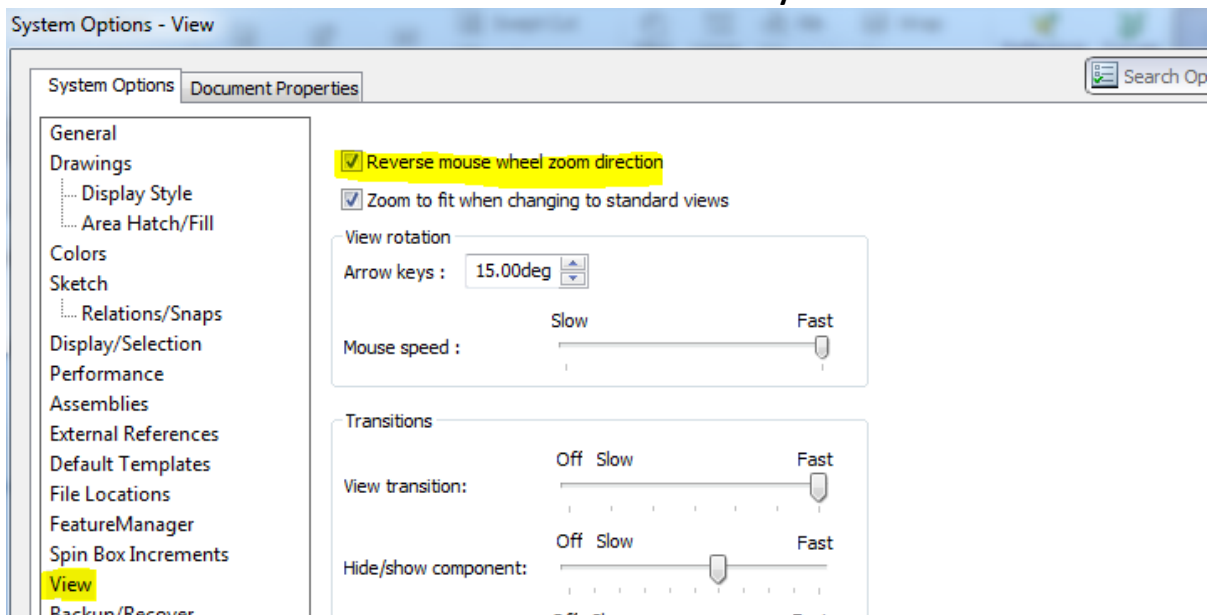
- a. **WHY?** - As we make new files from various methods other than File New, we'd like to be prompted to select the template of our choice. Our most common templates should be set above also. Refer to "Company Standards" for these defaults if at work.

11. Feature Manager - Turn On; Name Feature on creation, Arrow key navigation and set Solid Bodies to show.



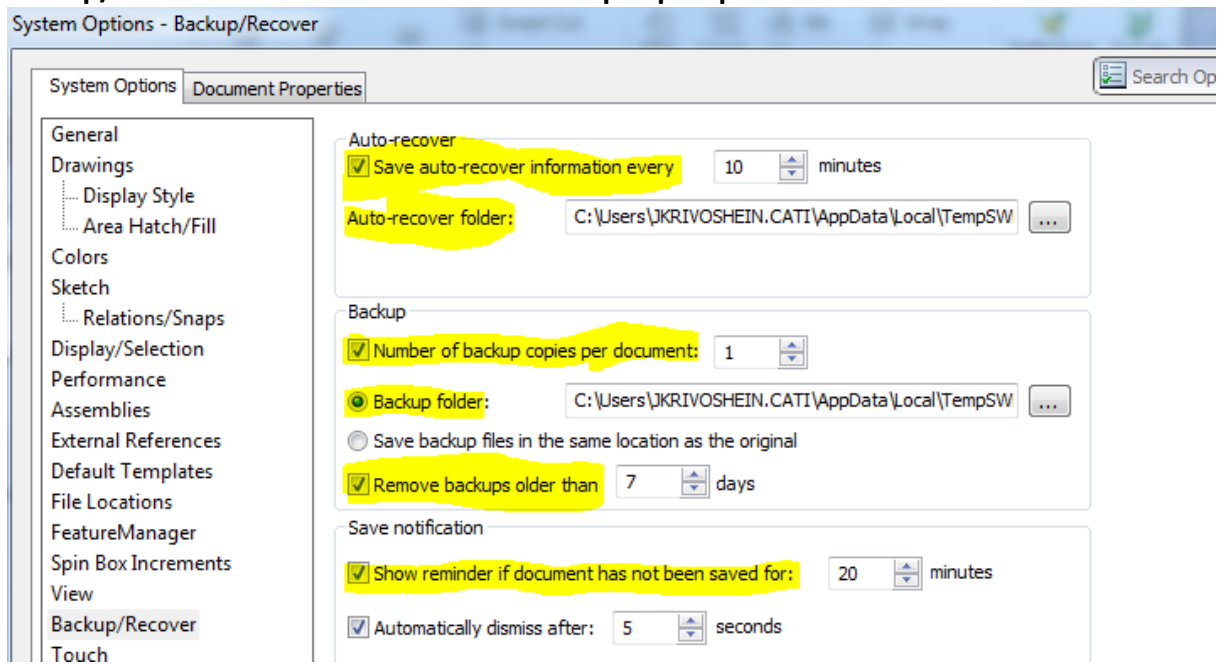
- WHY?** - Naming features is a great practice, having them be in rename mode on creation saves us the trouble of trying to get the feature in rename mode to change it.
- WHY?** - Arrow key navigation has been a very handy tool to navigate a part when one wants to learn how an existing part was created. New in 2013 is the Part Reviewer, which has even more function, but not all users are on 2013 just yet. Experienced users would likely show new users this capability from having used it in the past.

12. View - Reverse mouse wheel zoom direction - Turn it on if you use or have used Autocad.



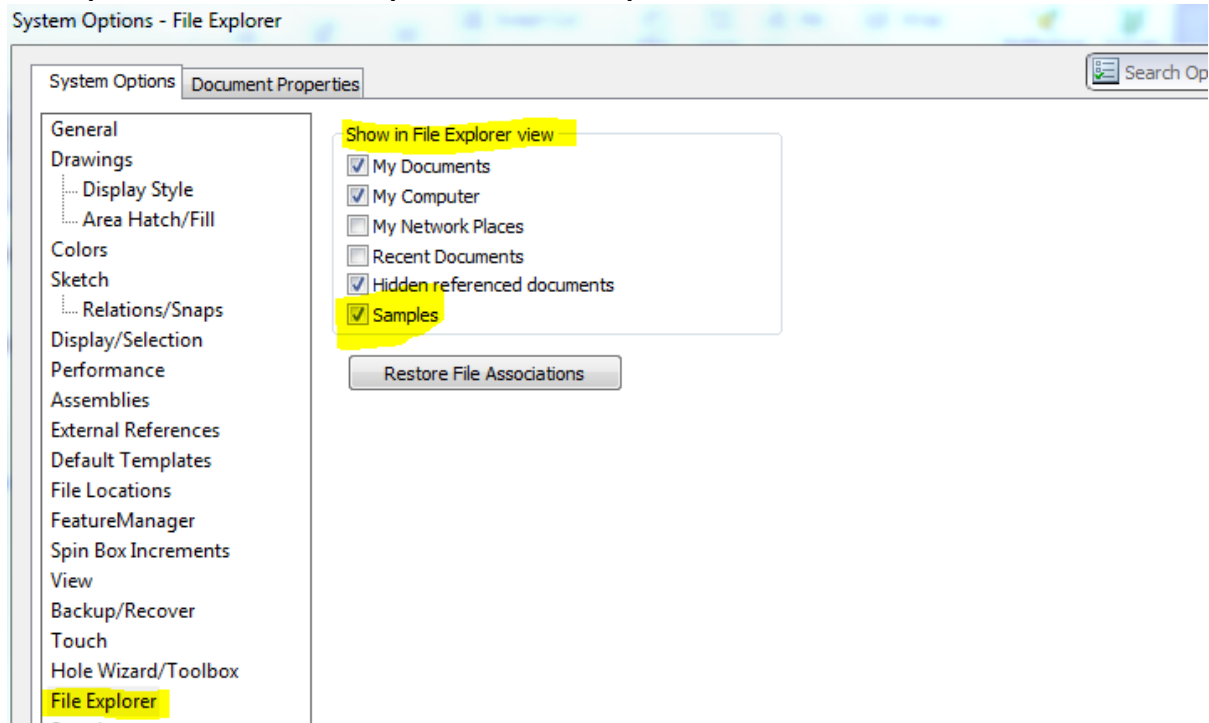
- WHY?** - Lots of SolidWorks users have used Autocad in the past or are still referencing documents with that interface or the free replacement; Draftsight. Turning this setting on makes the zoom while rolling the mouse wheel the same as the old tools, keeps a common function common.

13. Backup/Recover - Turn on - Number of backup copies per document.



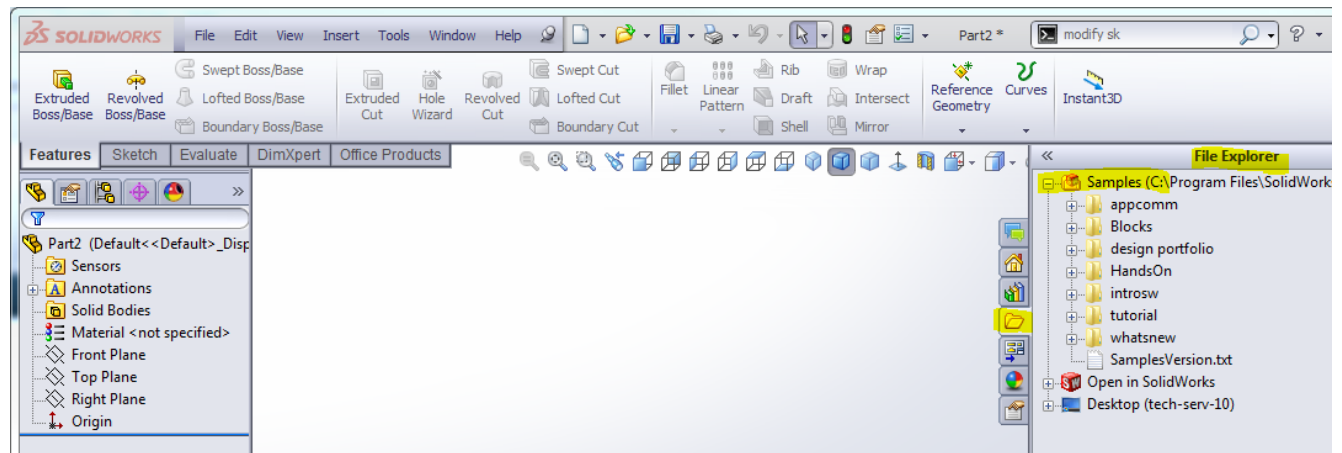
- a. **WHY?** - New users should have backup copies they can get to if bad things happen. Auto-recover is only available immediately after a crash and the user doesn't get direct access to the file information. None of these locations should be out on a network folder as that will likely slow things down. Removing the backup copies older than seven days makes sense. I've had users completely fill a hard drive in under a year because of backup copies that were never deleted.

14. File Explorer - Show in File Explorer View - Samples = Turn it on.

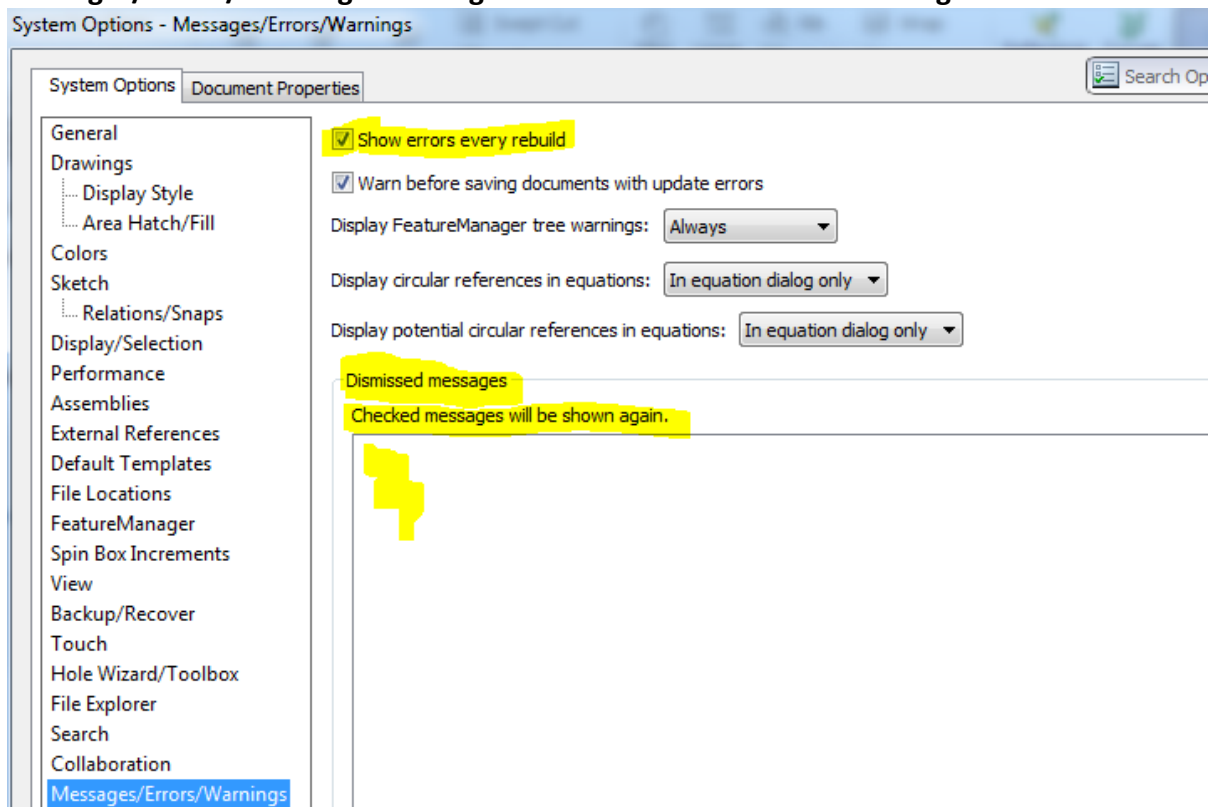


- a. **WHY?** - SolidWorks provides sample files that correlate to the What's New document, Help and Tutorials. Sure would be nice to be able to find them in the SolidWorks Task Pane.

b. See the results below.



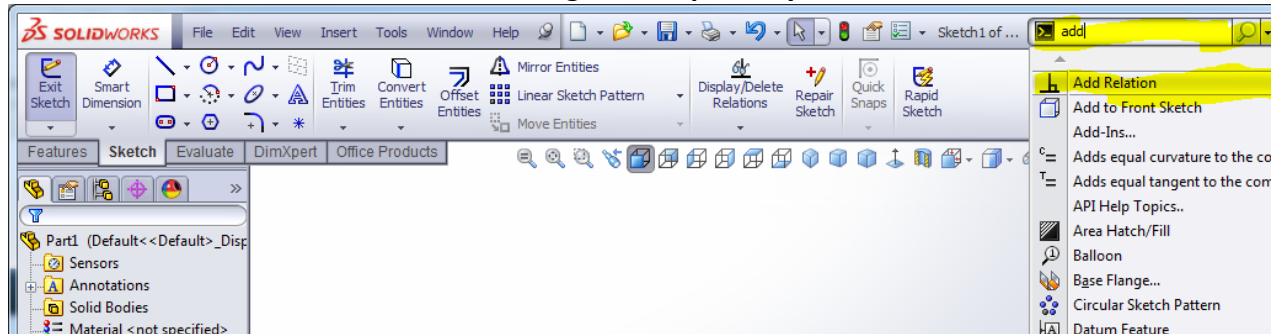
15. Messages/Errors/Warning - Nothing should be in the Dismissed messages list.



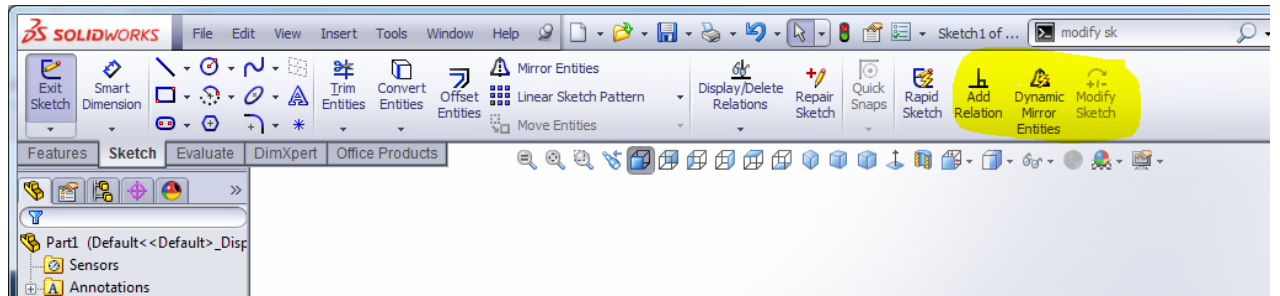
- WHY?** - Show errors every rebuild is on by default and should remain. New users need to know when mistakes happen and learn to address them right away.
- WHY?** - Dismissed messages have caused even experienced users to wonder why things are not working properly and why they weren't told about it. New users should be prompted with as much feedback as is available. (Unless someone is sitting right next to them all the time maybe.)

16. Sketch Toolbar Icons to Add - Add Relations, Dynamic Mirror, Modify Sketch.

- a. Use the Command Search Tool to find, drag and drop onto your Sketch Toolbar.

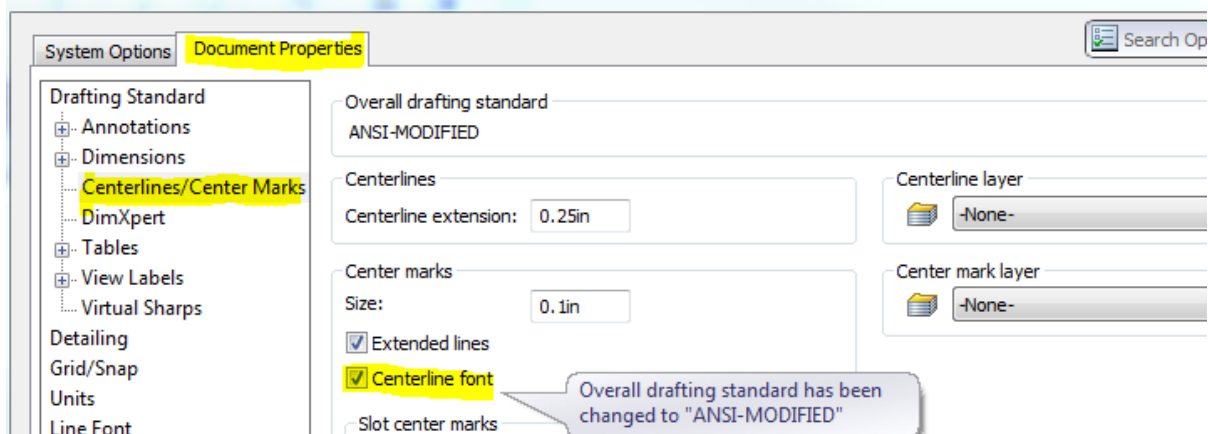


- b. See the results below.



17. Centerlines/Center Marks - Turn on Centerline font.

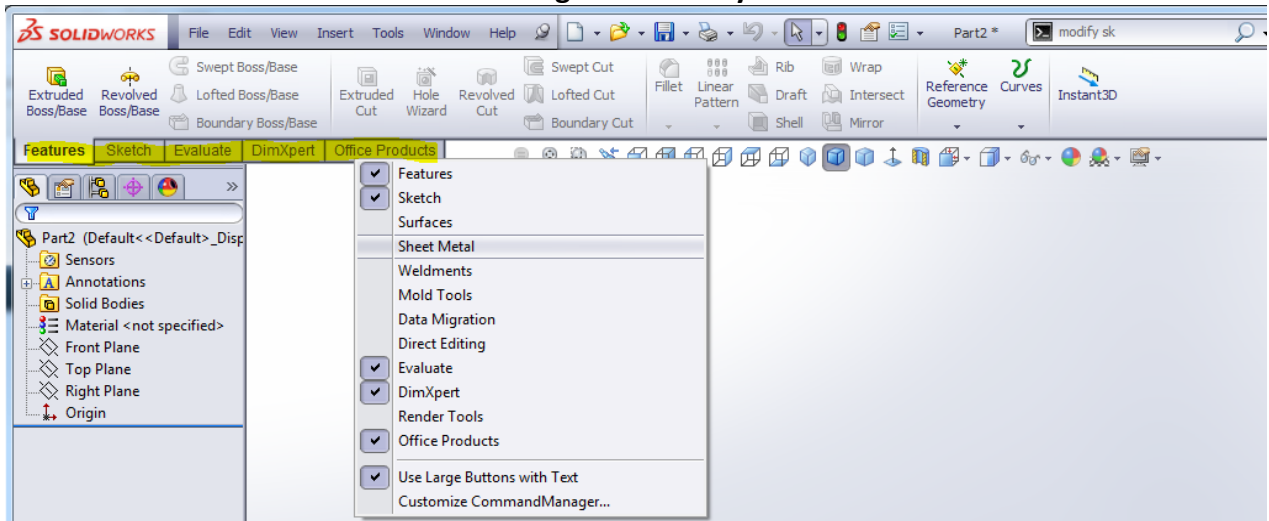
Document Properties - Centerlines/Center Marks



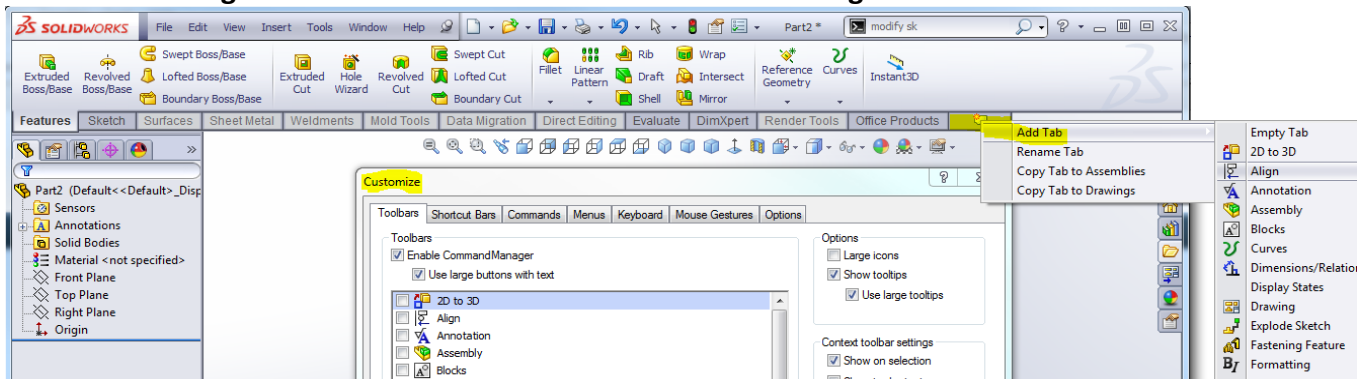
- a. First, this is a document property so if it's not set in the drawing template one may need to turn it on for each drawing.
- b. WHY? - Many users expect to see centerlines styles for centerlines and center marks. This however, does deviate from SolidWorks' ANSI standard and users would be notified as above.

18. Command Manager Tabs - How to add those not listed in the right click menu.

- WHY?** - There are many times when a user would like to have a toolbar that is not in the right click dropdown of the command manager tabs. So here is the cumbersome process to add them.
- HOW?** - First right click on any tab from the Command Manager (Office Products)
- HOW?** - Select **Customize CommandManager** at the very bottom of the list.



- HOW?** - Then make sure to move the Customize window down below the Command Manager tabs.
- HOW?** - The last tab doesn't have a name, just a tab with a sparkle, right click on that last tab.
- HOW?** - Select **Add Tab**, then the desired Toolbar name you'd like to have available in the Command Manager. Once selected it will be available for turning on and off.



- Note:** The Toolbars tabs and checkmarks, only turns on the "old-school" toolbars that usually get docked to the sides of the screen and make the graphics area smaller.

Final Notes: This is just one instructor's recommendations, documentation of his "best practices" for his SolidWorks Essentials Training classes. SolidWorks' extensive customization allows users to customize things to "their" liking and ease of use. Just as design intent usually dictates how things get dimensioned/constrained/modeled, user preference usually dictates how the interface is customized. At least for anything that isn't a critical issue/ setting/practice for company standards/best practices.