

Prepare your first MST assembly evaluation

A practical MST onboarding guide: scope, engineering owners, authorized model libraries, interface readiness, Windows Agent responsibilities and evaluation handoff.

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Start with a deliverable, not your entire vault

Choose one representative equipment module and name the result you want to inspect. Keep the first input set small enough that your engineer can independently judge it. Identify whether the case tests repeat use of supported families or introduces new families; those have different enablement needs.

Your initial message to MST only needs a non-confidential description: equipment category, CAD environment, repetitive task and desired outcome. Do not attach customer drawings, models or BOM through public channels. Define the permitted transfer method and processing scope before protected material is exchanged.

Assign four responsibilities

Owner	Decision they must be able to make
Engineering sponsor	Approves the task, process interpretation, constraints, acceptance criteria and engineering review. Names the final release authority.
CAD/PDM administrator	Approves the model subset, revisions/configurations, read/write boundaries, reference resolution and output location.
IT/security owner	Approves the workstation, Agent installation, permitted service connections, data flow, support access and operational controls.
MST evaluation lead	States supported scope, known gaps, setup tasks, deliverables, checkpoints and how exceptions are escalated.

Confirm the CAD execution environment

- Record the actual Windows and SOLIDWORKS versions, relevant licenses, required add-ins and the account under which the Agent will operate. Compatibility must be confirmed for that environment.
- Agree the authorized library location, how files and their dependent references become available, where outputs may be written and how old revisions are kept distinct.

- Document the Agent's job ownership, workstation availability and what happens during a timeout, CAD interruption or operator cancellation. Do not assume multi-user or multi-workstation behavior without verifying the chosen deployment.
- Run the installation and recovery checks specified for your deployment with the IT owner. This guide supplies planning questions, not executable installation commands.

Qualify the permitted model subset

Make a readiness record per relevant part family or model revision. Include the selection identity, native configuration, unit convention, reference availability, required ports/interfaces and any unresolved interpretation. A mesh preview is not sufficient proof of interface readiness.

Classify each item as ready for the agreed relationship, needs engineering confirmation, needs family-rule work, or unsupported in the evaluation scope. Assign an owner and an agreed next step. This is an evaluation worksheet; it does not claim that a fully automated readiness-report feature is already deployed.

Keep a baseline library revision for the first run. If a component changes, record what changed and which qualification or regression checks need repeating. Successful use of one family does not automatically qualify visually similar components.

Complete the data-flow schedule before transferring files

For each category below, record the actual processing location, service/operator, access roles, retention, deletion or return method, and approval owner. Customer-side SOLIDWORKS does not establish where upstream processing or storage occurs. Leave unknown answers unresolved until the responsible parties confirm them.

- Original P&ID, BOM and native component files, including dependent references.
- Extracted geometry, interface descriptions and any review labels or model-derived data.
- Intermediate planning inputs/outputs and job instructions received by the Windows Agent.
- Saved assemblies, execution results, diagnostic logs and support screenshots.
- Any model-provider processing, storage-region choice, subprocessor access or training-use terms relevant to the actual deployment.

Run an agreed case and a bounded variation

- Freeze the input revisions and checklist before running. Mark required checks and name their evidence source.
- Review P&ID/BOM interpretation and selection ambiguities before accepting downstream placement.
- Inspect the physical result against the constraints that are actually supported and active.
- Inspect the saved native assembly and the required reopen/read-back results. Record any missing verification as CANNOT_VERIFY.

- Repeat a permitted variation using the same qualified families. Record preparation, execution, human review and correction separately.
- Agree the acceptance outcome, unresolved exceptions and the next scope. A technical evaluation does not itself authorize manufacturing or publicity.

Agree change, support and exit boundaries

The commercial scope should state which modules, sites/users, CAD versions and component families are covered; which initial enablement work is included; and how new-family work, upgrades and support are handled. Do not treat every future model or module as included by default.

Name the support contact, approved diagnostic channel and escalation process. Discuss backups, recovery and ownership of output access before a failure, not afterward. Confirm the practical method for returning or deleting authorized materials and revoking access when the evaluation ends.

Use the blank readiness and data-flow worksheets as a meeting agenda. They contain no customer examples or pre-filled approvals. Keep completed worksheets in your approved private channel, not in a public post or shared marketing folder.

Sources and next steps

[MST deployment overview](#)

[MST product scope](#)

[Read the online edition and related resources](#)

[Request an MST workflow evaluation](#)

Technical scope: Planning scope: evaluation preparation, deployment responsibilities and technical handoff; installation procedures are agreed for the chosen environment.