



PDM Studio

What's new 2023 | EN | MP 00

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Imprint 49

Introduction

PDM Studio 2023 is a **new major release of PDM Studio**, that includes several improvements and enhancements. It includes an updated user interface, new functionalities, and fixed bugs.

The most important points are described in detail in the following sections.

More information on the installation of the V2023 MP00 is available in the document:

[“PDMStudio_Installation_2023_EN.pdf”](#)

Important: Please refer to the notes in the „Setup Client Administrator“ topic after the installation.

Licensing 2023

A new version of licensing, version 2023, has been introduced with PDM Studio version 2023.

Supported Operating Systems:

Windows 10, Windows 11, Windows Server 2016 or higher.

Important: Windows Server 2012 is no longer supported by Flexera Licensing. Before installing, please check which operating system is running on the server where the Cadpartner Licensing will run. If it is Windows Server 2012 and there is no way to change it (upgrade to Windows Server 2016 or higher), you MUST select another computer that meets the hardware requirements.

Please note that the hardware ID will change, and you will need a new PDM Studio license if you choose a different computer.

Update Licensing Version 2023

Important: PDM Studio version 2023 requires a NEW license file. The license file for version V2020 is NOT VALID for version 2023. BEFORE upgrading to version 2023, be sure to request your new license file.

The new Cadpartner V2023 Licensing will be automatically installed during the installation of PDM Studio V2023 MP00.

Installation

Important: We strongly recommend checking in all documents and clearing the local cache on all clients before installing PDM Studio V2023 MP00.

Important: Also all client applications like PDM Studio, Solid Edge as well as the Automation Server MUST be closed. We recommend, making a backup of the data storage before each update.

General

SQL Server Maintenance Plan for SQL Productive Database Maintenance.

Depending on how fragmented the indexes of a table are, this can **degrade the performance of queries** from PDM Studio to the tables of the database. Therefore, the indexes should be maintained at regular intervals.

Note: Please refer to the document "SQL Maintenance Plan_EN" in the "Documents\EN" directory of your MP00 installation files.

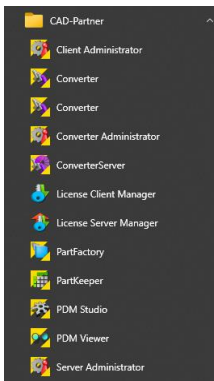
New naming convention for PDM Studio applications

With the new version of PDM Studio V2023, the naming of the software has changed and some of its applications have been renamed. The name SMAP3D has been removed from all applications.

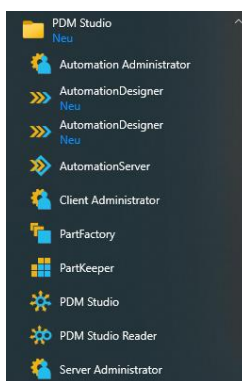
PDM Studio has a **new program group "PDM Studio" instead of "CAD-Partner"**. Only the licensing of the **PDM Studio** remains in the previous (until version 2020) CAD-Partner group.

Previous CAD-Partner group in V2020 and new PDM Studio group in V2023:

V2020:

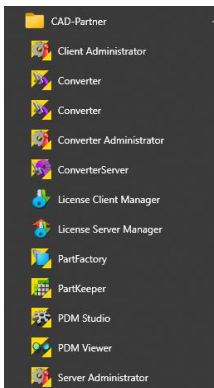


V2023:

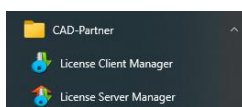


Previous group CAD-Partner in V2020 and new group CAD-Partner in V2023:

V2020:



V2023:



Overview of the name change:

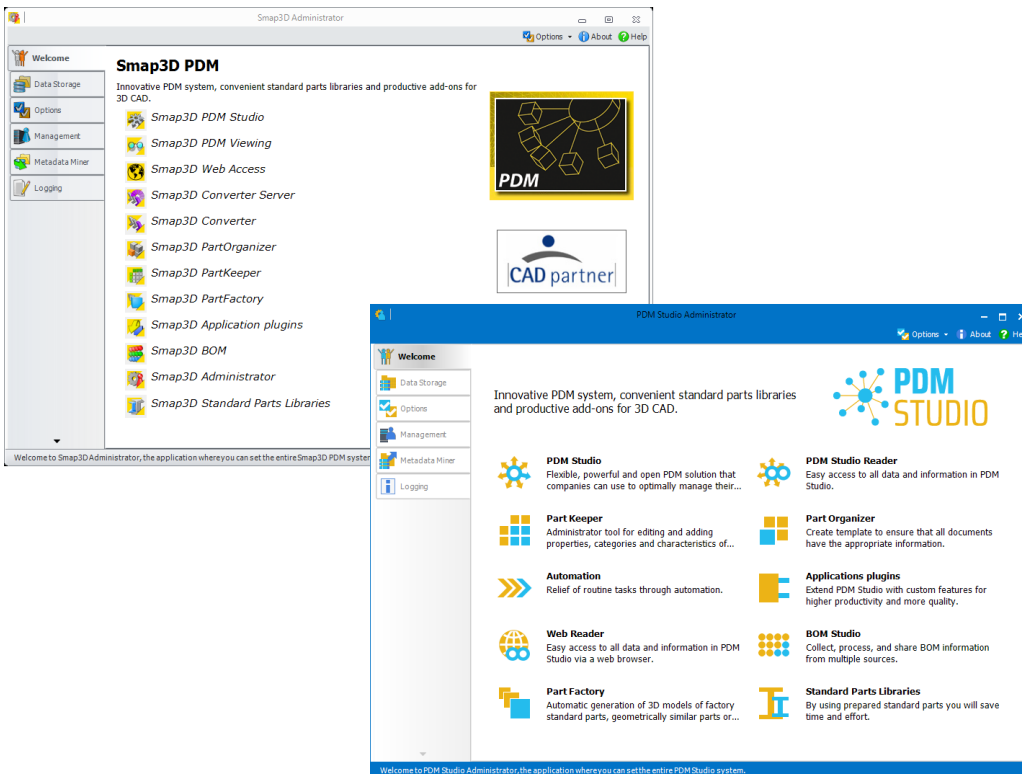
OLD (until V2020)	New (from V2023)
PDM Studio	PDM Studio
PDM Studio Viewer	PDM Studio Reader
PDM Studio WebAccess	PDM Studio Web Reader
Server Administrator	Server Administrator
Client Administrator	Client Administrator
Converter Administrator	Automation Administrator
Converter Server	Automation Server
Converter	Automation Designer
PartKeeper	PartKeeper
PartFactory	PartFactory
Smap3D API (Taskbar)	PDM Studio API (Taskbar)

Redesigned user interface and icons

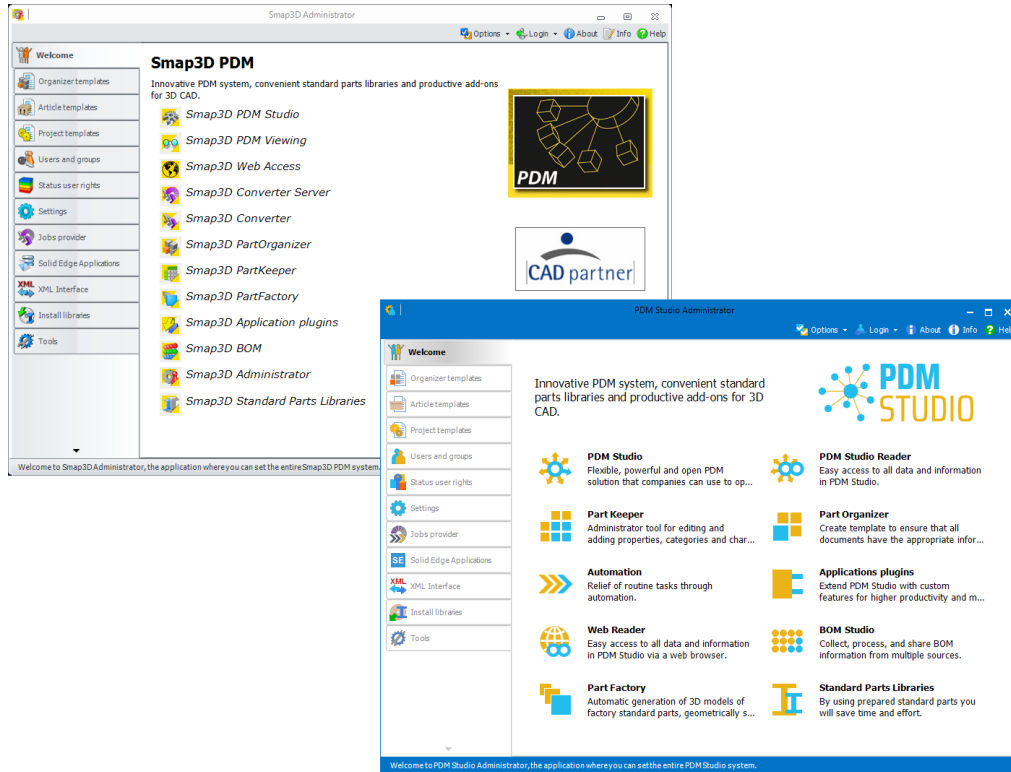
In version 2023, the user interface and icons have been redesigned. New icons with a more modern design have been introduced, including new icons for all directly supported applications.

The images below show a comparison between PDM Studio V2020 and V2023. We will go into more detail in the individual application chapters.

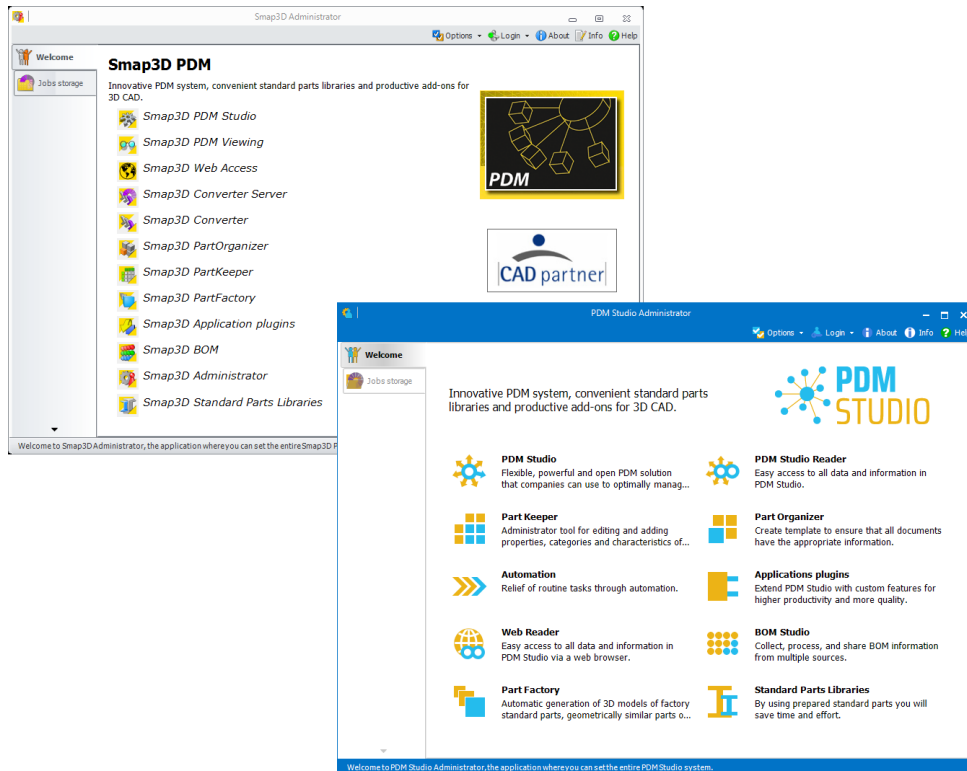
PDM Server:



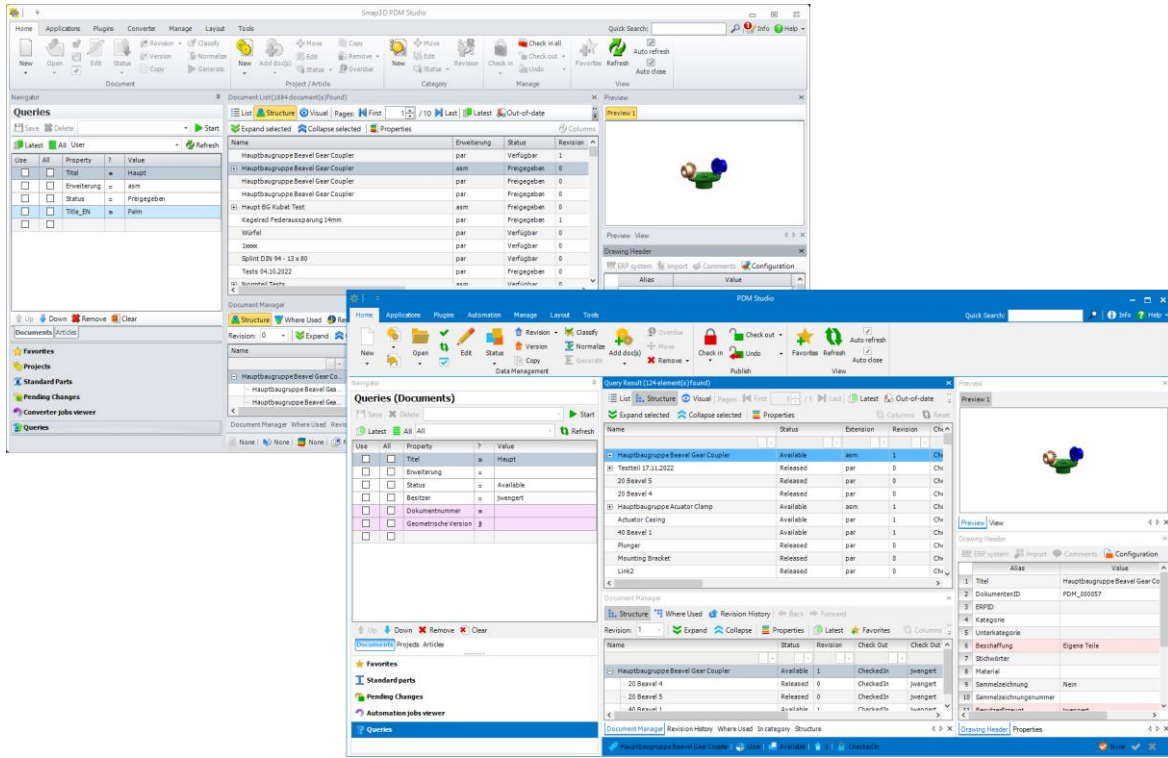
Client Administrator:



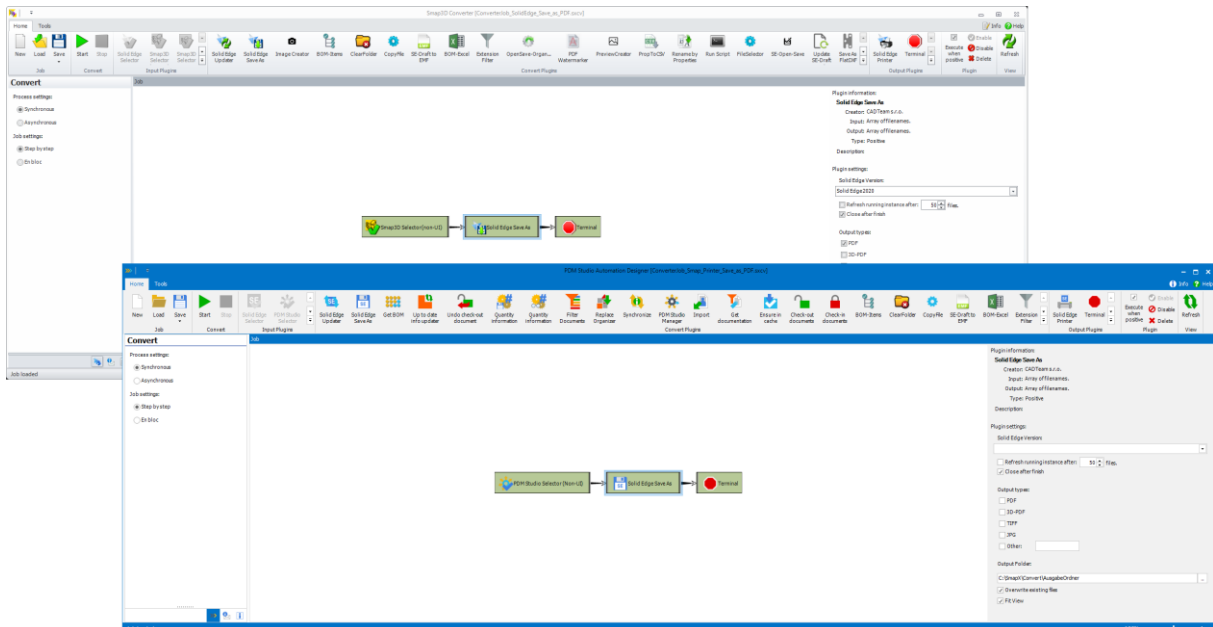
Automation Administrator (formerly known as Converter Administrator)



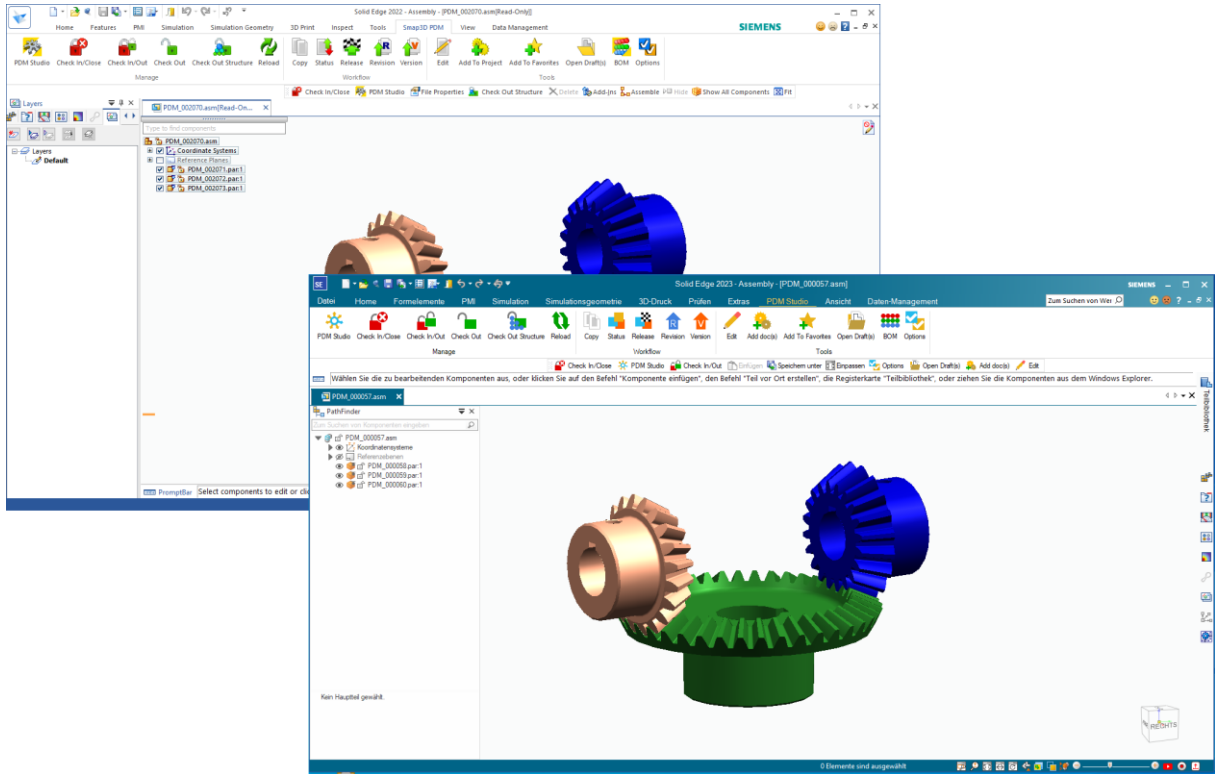
PDM Studio



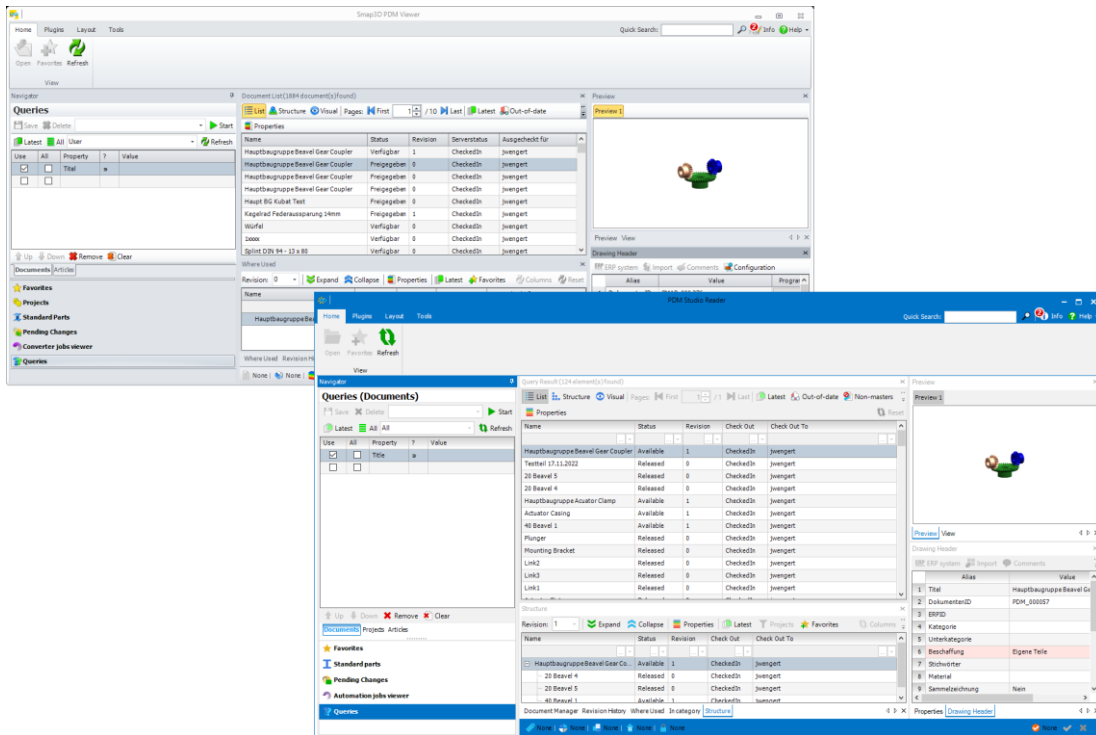
Automation Designer (formerly known as Converter)



Solid Edge



PDM Studio Reader (formerly known as PDM Studio Viewer)



Article

General

An Enterprise Resource Planning (ERP) system and a Product Data Management (PDM) system are both software solutions designed to manage business processes and data. An ERP system provides a comprehensive solution for financial accounting, human resources, inventory management, supplier, and customer relationship management, while a PDM system focuses on managing product information and data.

An article in an ERP system describes a single product or commodity and includes information such as part number, description, inventory, sources, and price. An article in a PDM system, on the other hand, contains more comprehensive technical details about the product, such as 3D models, drawings, manufacturing and bill-of-materials information, technical documentation, material data, and so on.

Communication PDM <> ERP

PDM Studio can communicate directly with ERP systems through its **optionally available ERP framework**, enabling seamless monitoring of product processes and data. The integration of PDM Studio into an ERP system leads to significantly improved process efficiency and better monitoring of business processes.

PDM Studio

With **PDM Studio V2023**, the "**Article**" object type has been implemented as a new main object in PDM Studio. In PDM Studio, articles are not represented by a single document directly linked to the data record. Rather, they are to be understood as a bracket for all documents and information relevant from a PDM point of view with reference to the respective article (e.g. MCAD document + ECAD document + technical description of the article, ...). The assignment of documents to an article is comparable to the assignment of documents to projects.

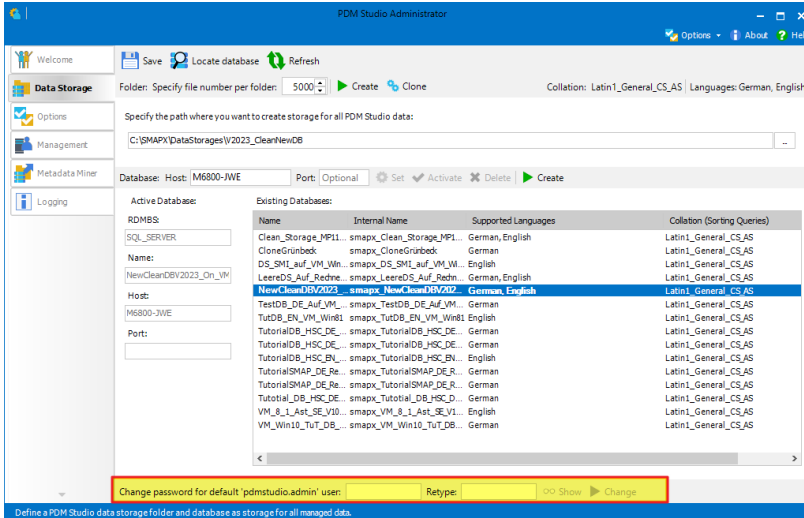
*Note: The "Article" object type in PDM Studio does **not implement ERP functionality in PDM Studio** but allows to store/provide information about ERP articles in a form optimized/compressed for PDM users, together with the respective article representing/describing documents.*

Important: Currently, an article can only be assigned to a single project. Multiple assignment possibility will be added in a future maintenance pack.

Note: An article can be assigned to a project, but it is not possible to assign a project to an article.

Server Administrator

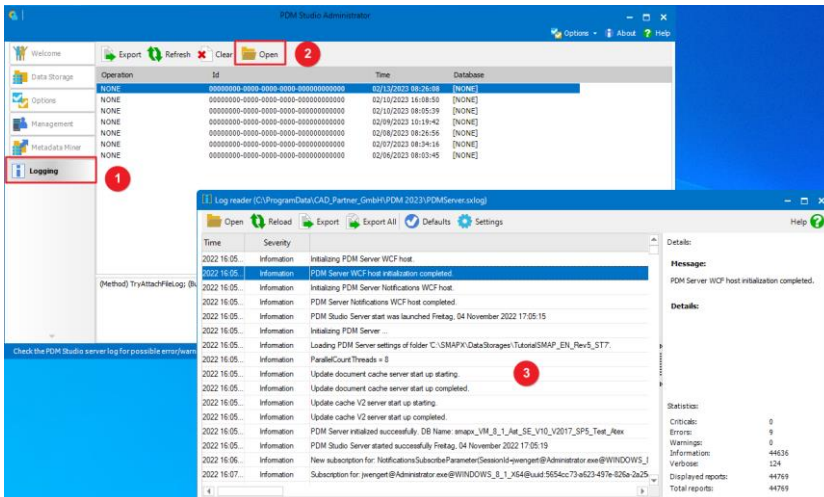
Changing the password for the user „pdmstudio.admin“



In PDM Studio version 2023, the function for **changing the administrator password** for the administrator user "pdmstudio.admin" on the Data Storage tab, has been moved to the bottom of the window.

Important: The password can only be changed when the PDM Studio Server is turned off.

Server Log

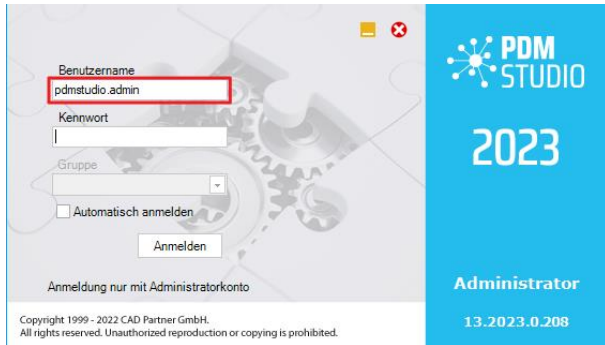


The PDM Studio V2023 server log can now be **opened directly in the Server Administrator**. To do so, **open the PDM Studio Server Administrator**, go to the "Logging" tab (1) and click on the "Open" button (2). The **Server log (3)** is displayed.

Note: If PDM Studio Server does not start for some reason, **first check the Server Log** to see, if there is an internal error (e.g., data storage is on an inaccessible drive) in your system environment.

Client Administrator

New administrator username



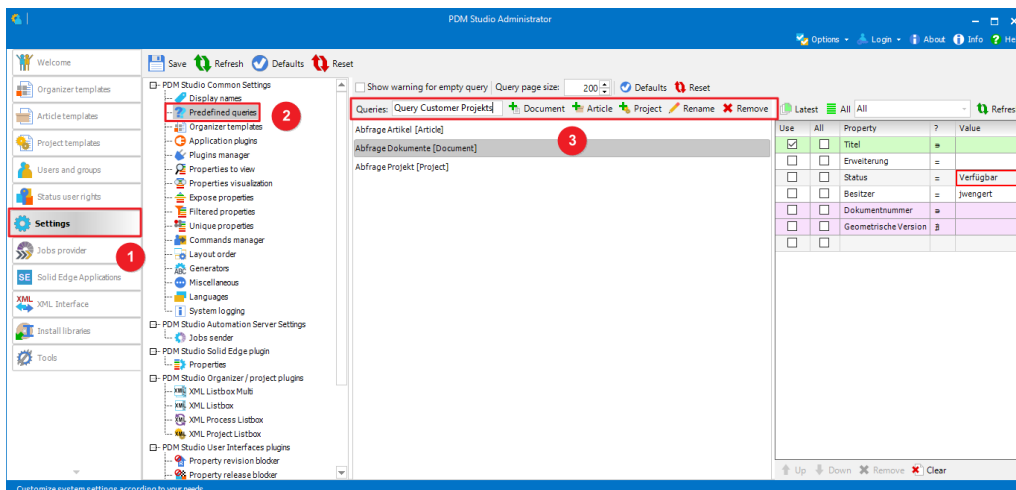
The name of the administrator user was changed from "smap3d.admin" to "pdmstudio.admin" starting with PDM Studio version 2023.

Important Note: PDM Studio V2023 now uses the new administrator username "**pdmstudio.admin**" to log into the Client Administrator. The default password remains the same.

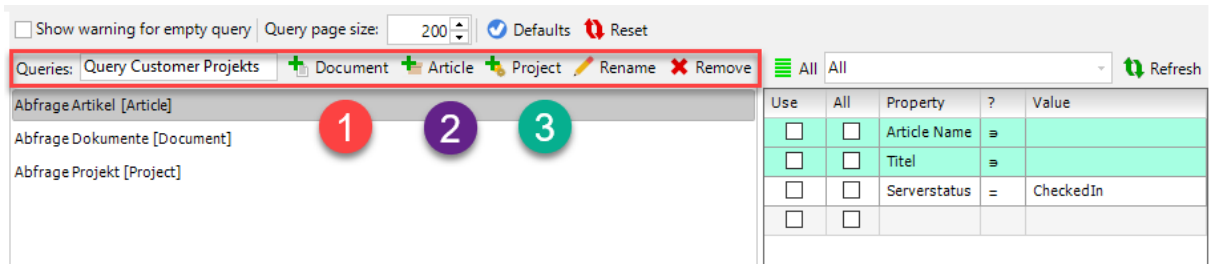
Predefined queries

PDM Studio V2023 introduces a major improvement to the Project and Article Search feature. The Projects tab in the Navigator has been removed and the Project and Article Search feature has been integrated into the Queries panel instead. This improves the clarity and unification of search results. These improvements include the ability to define predefined Project and Article queries in Client Administrator.

For more information, refer to the [chapter PDM Studio](#).



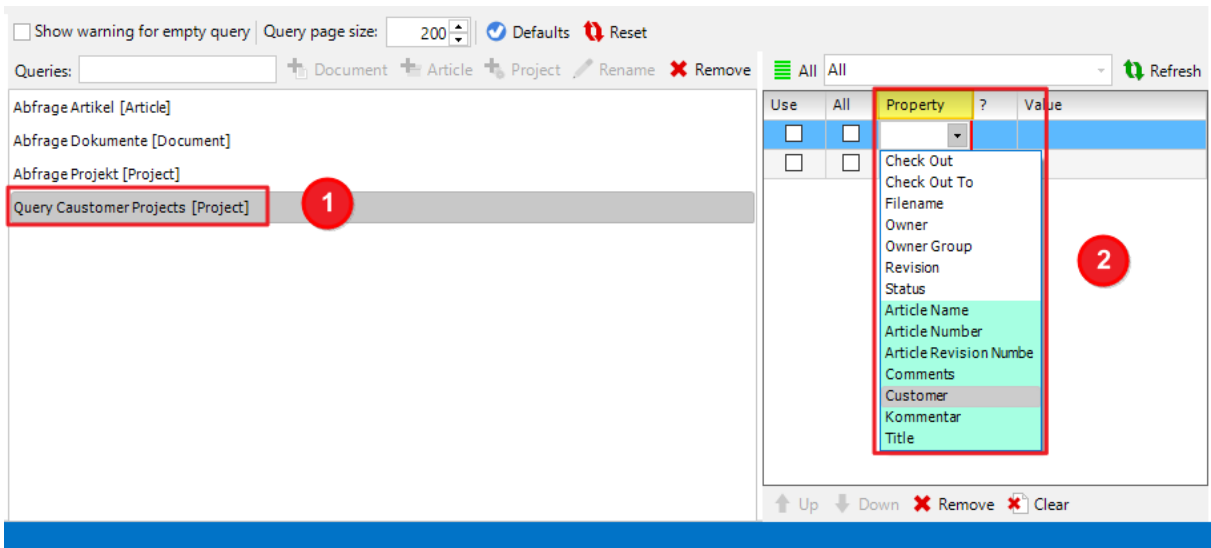
The new predefined queries for Projects and Articles, are now located in the same place as the predefined queries for Documents. Go to Settings (1), and then to Predefined queries (2). In the Predefined queries window (3), you can now add the new queries for Projects and Articles as well.



To **add a new query**, first enter the **name** of the new "Predefined query" in the **Queries input field**. In our example "Query Customer Projects".

Then you can choose **which query type** you want to assign the new query to. The types "Document" (Document query) (1), "Article" (Article query) (2) and "Project" (Project query) (3) are available.

In our example, we choose the type - Project for the new "Predefined query."



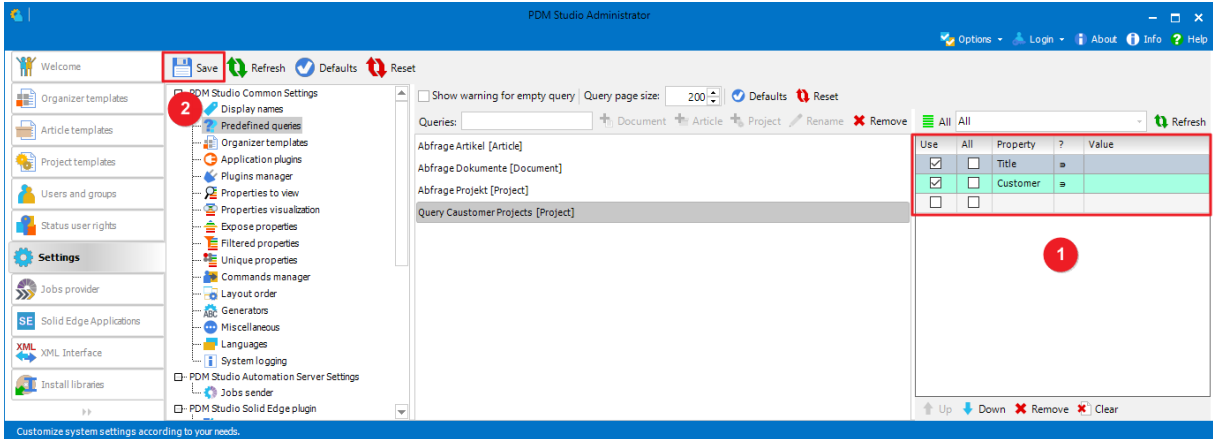
The new query "Query Customer Projects" has been added to the **list (1)** of available predefined queries.

In the next step, add the properties you want to search for.

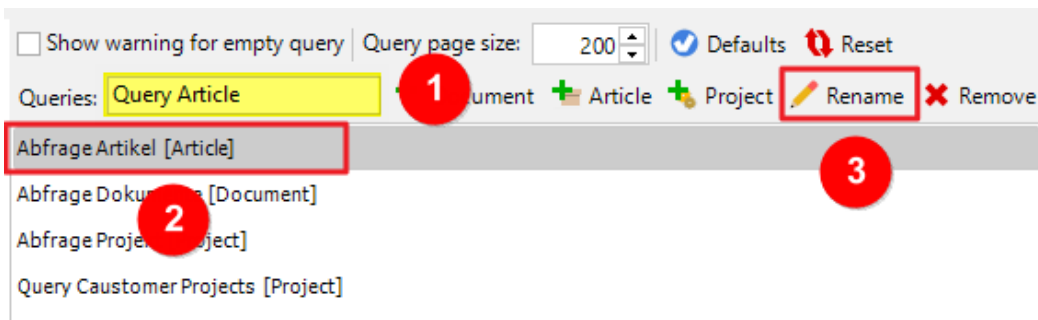
Important: The list of available properties for your predefined query (2) displays only those properties that apply to the Projects query type (standard project properties and custom properties you created for your projects in the Organizer template).

Note: The light green color (2) is used for both the article properties and the project properties.

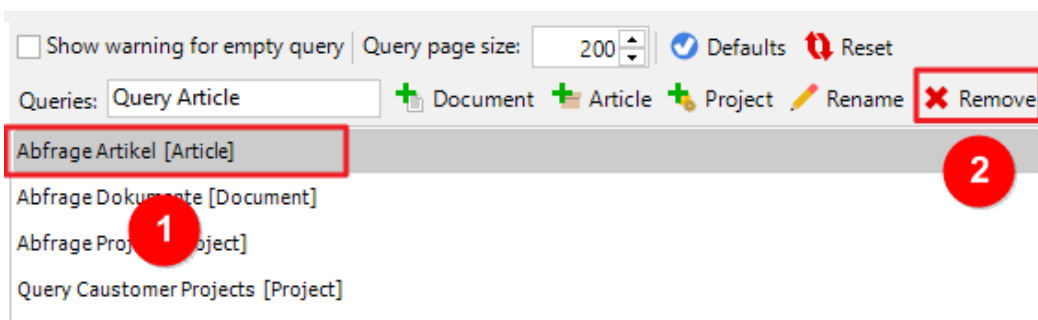
The **next step** is to **select the properties (1)** that will be displayed by default in the PDM Studio project queries.



Then **“Save”** your new predefined query using **Save (2)**.

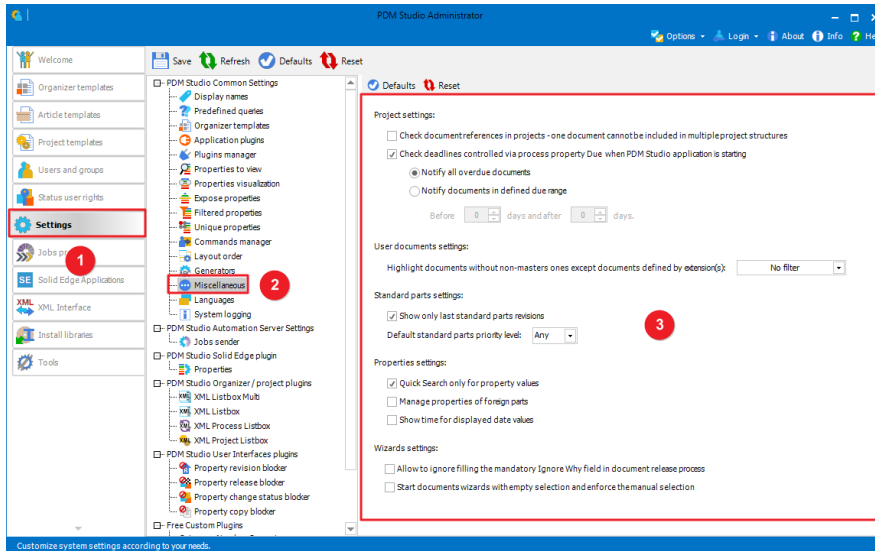


To **rename a query** in the list, type the **new name** you want to use in the **Queries field (1)**, select the **query to be renamed** in the **window below it (2)**, and choose **Rename (3)**.



To **delete a query** from the query list, **select the desired query (1)** and choose **Remove (2)**.

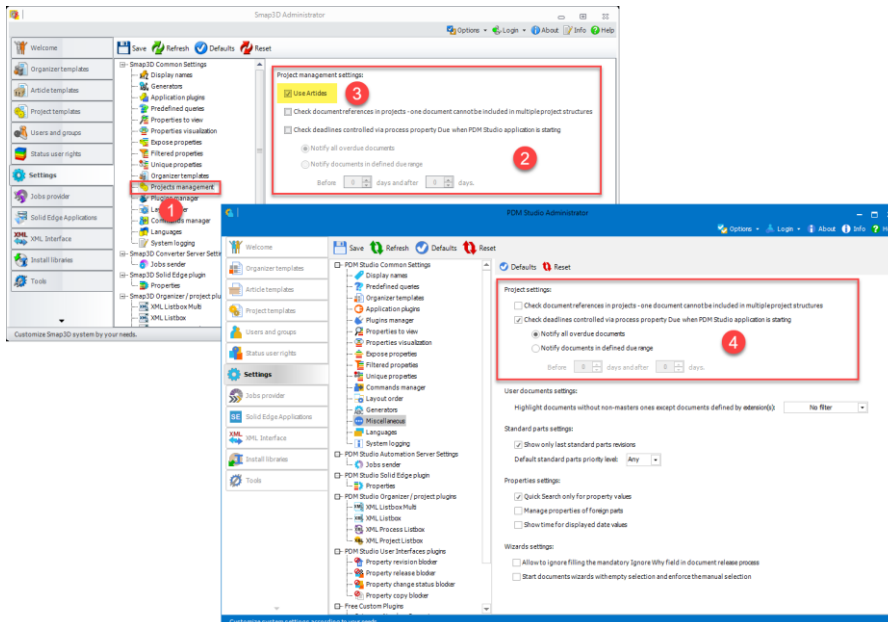
Added a new tab called "Miscellaneous" in the settings



In PDM Studio V2023, a new "Miscellaneous" section (2) has been added to the Settings (1) to improve the clarity of the settings. In this new section (3), various settings of the PDM Studio V2020 Client Administrator are now centralized.

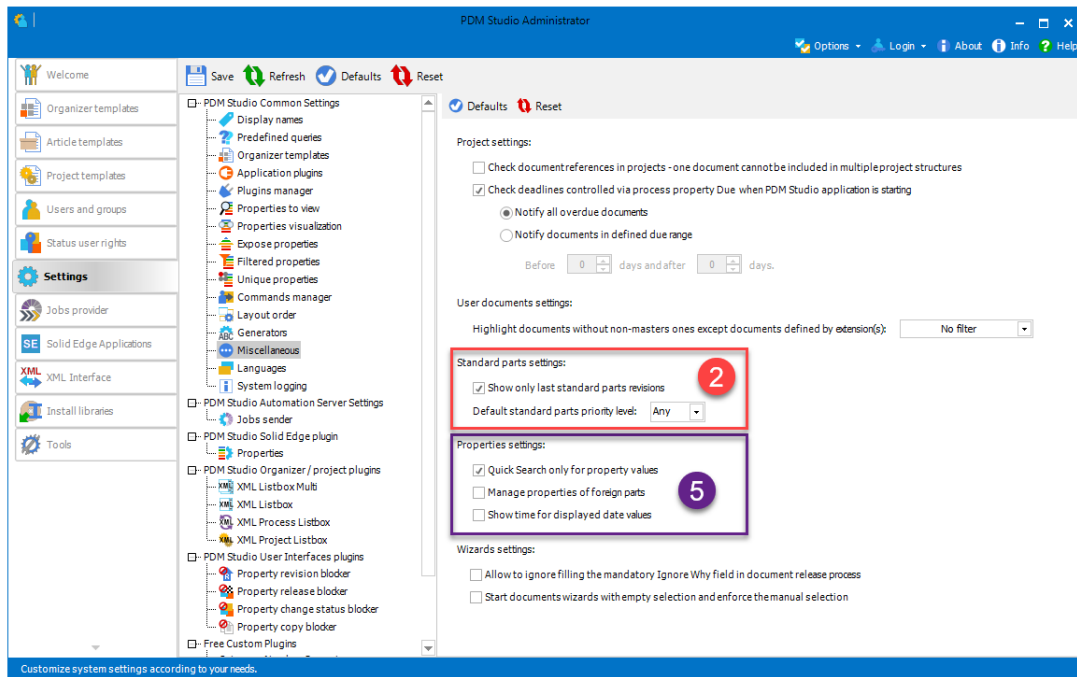
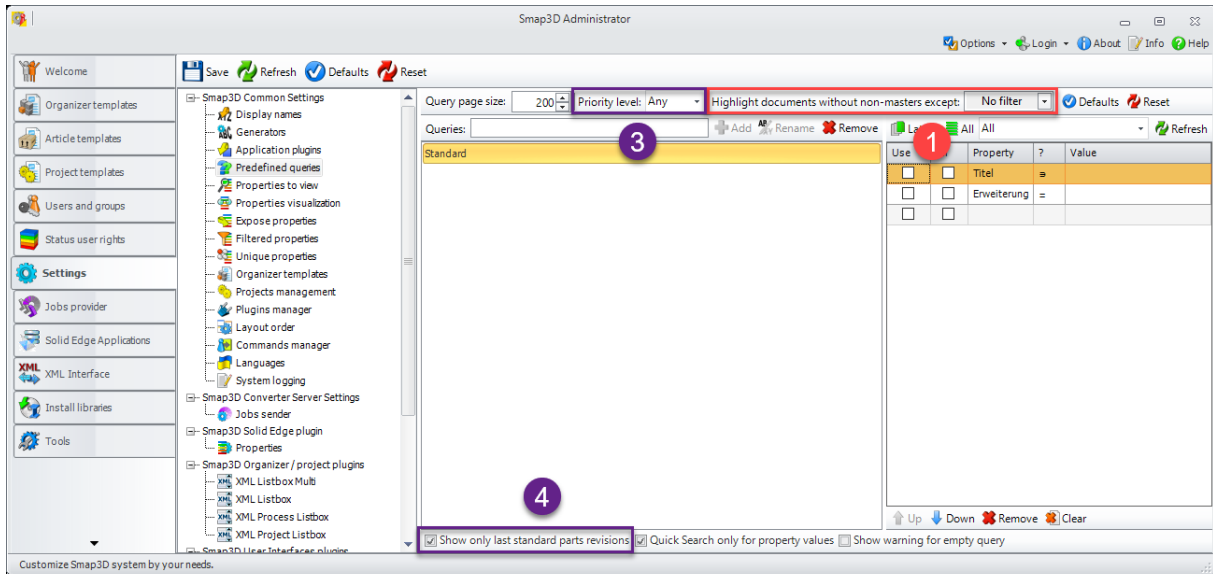
Details:

Project settings:



The PDM Studio V2020 Project Management setting (1) has been removed in version 2023, and the V2020 Project Management settings (2) are now in the "Miscellaneous" section of V2023. Since Articles are now fix part of PDM Studio V2023, the "Use Articles" setting (3) is no longer needed.

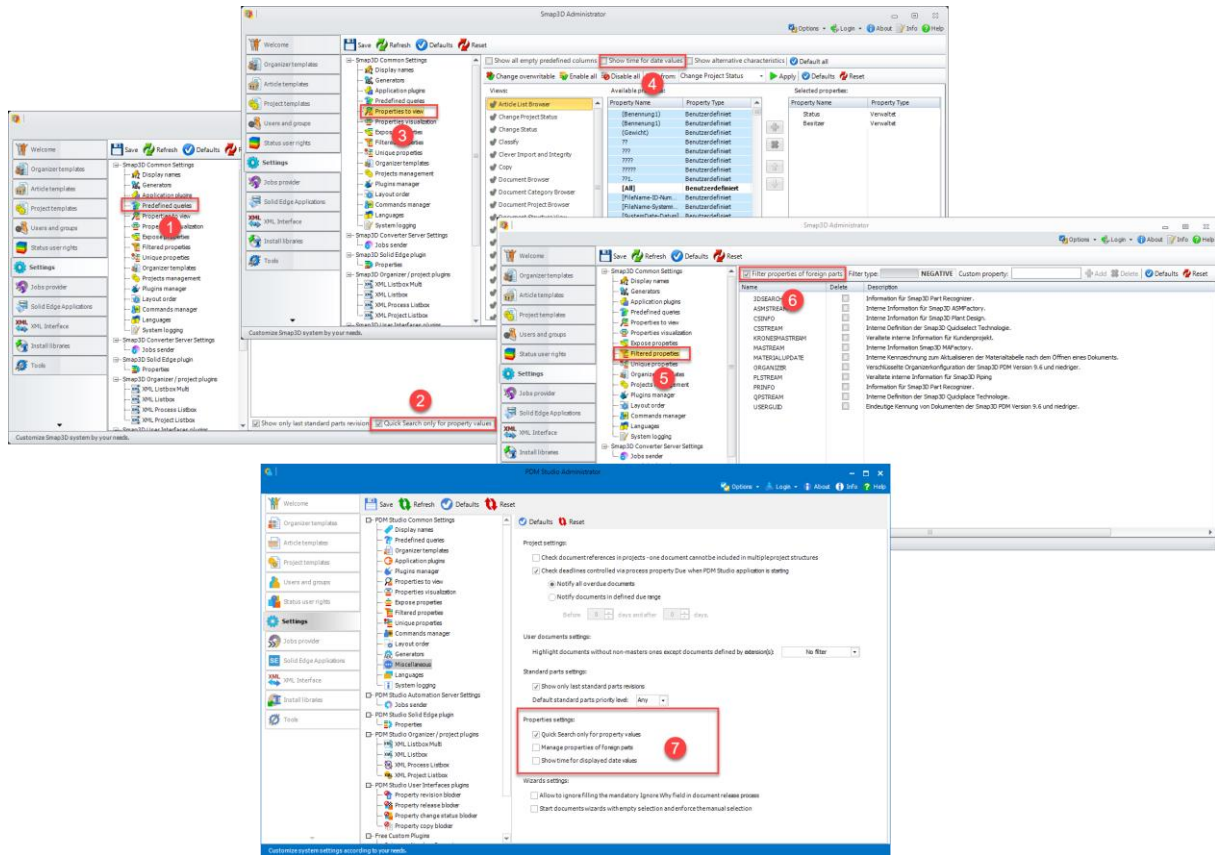
Settings user documents and standard parts



The "Highlight documents without non-masters except" (1) setting is now included in the "Miscellaneous" section of the User Documents settings group (2).

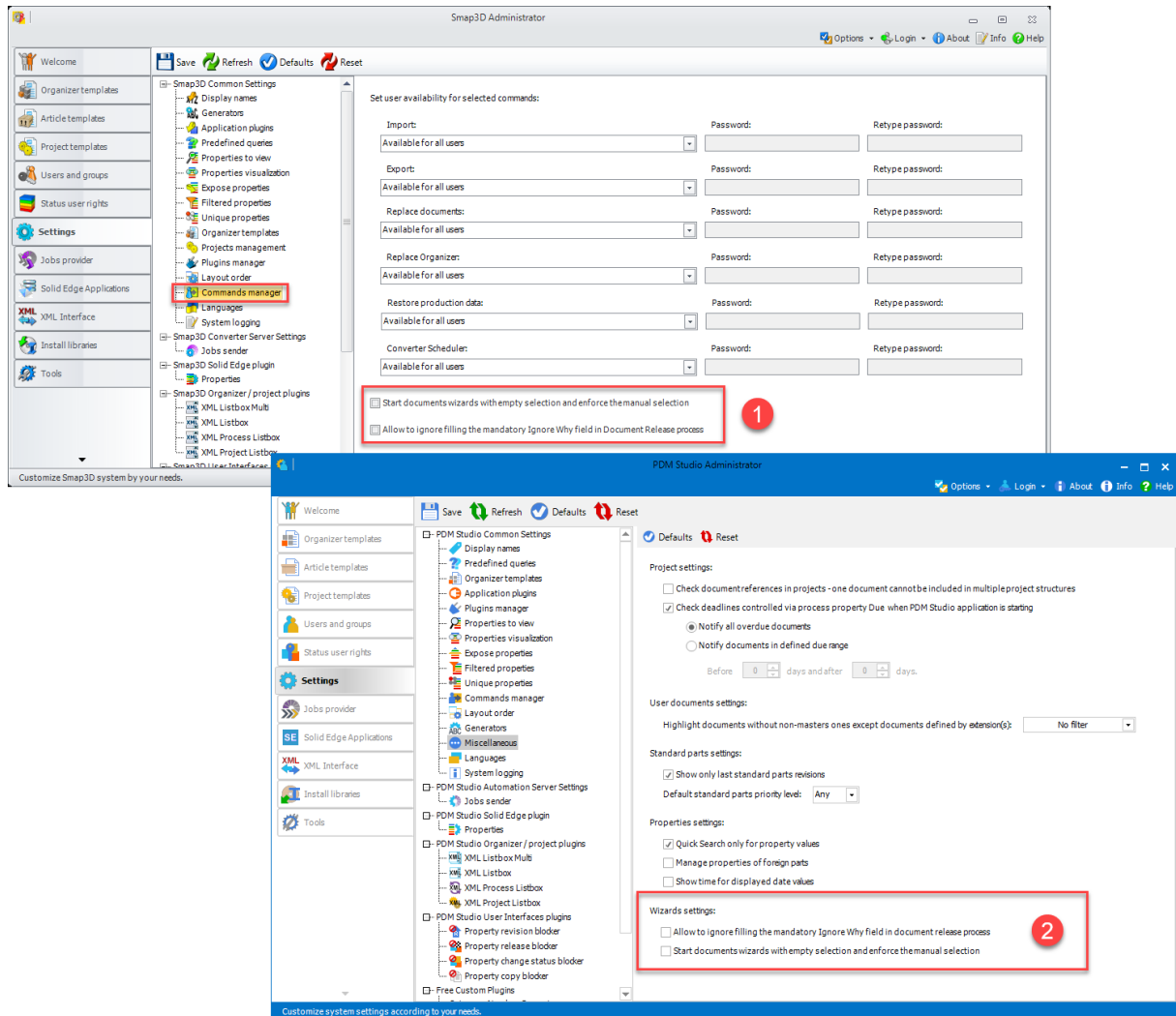
The "Priority level" (3) and "Show only last standard part revision" (4) settings are now also included in the "Miscellaneous" section of the "Standard part settings" (5) group.

Properties settings



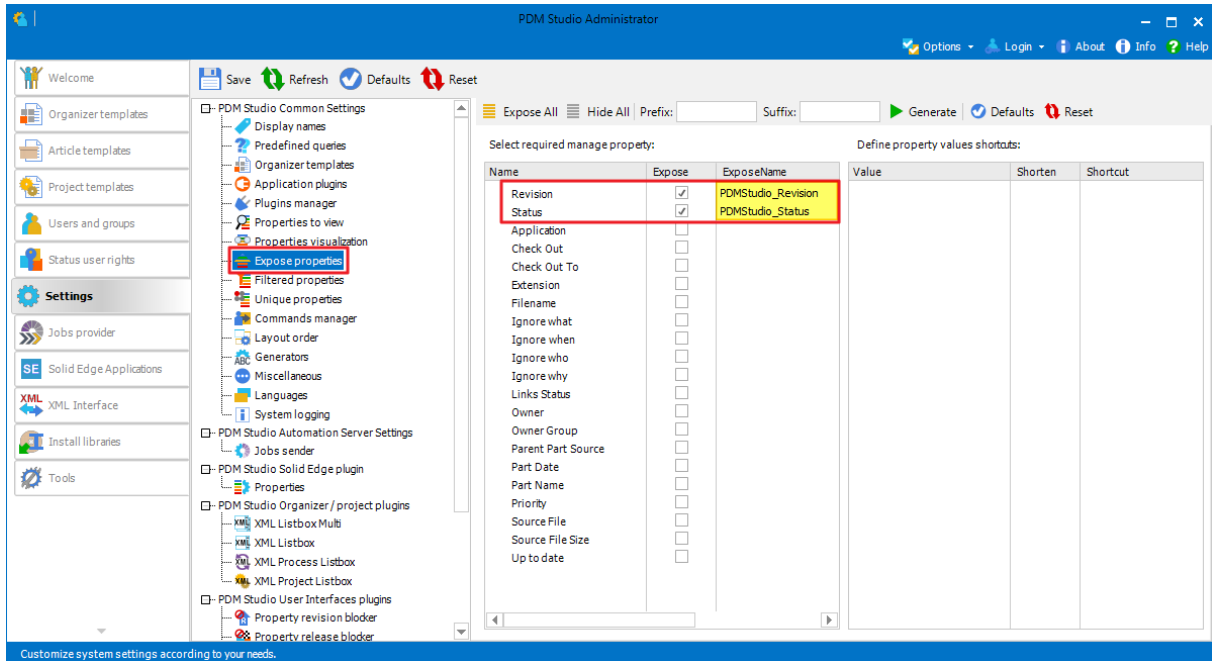
In the "Properties settings" (7) group of PDM Studio V2023, the V2020 settings "Quick search only for property values" (2) from the "Predefined queries" (1) group, "Show time for date values" (4) from the "Properties to view" (3) group, and "Filter properties of foreign parts" (6) (new name in V2023 "Manage properties of foreign parts") from the "Filtered properties" (5) group are grouped together.

Settings wizards



The settings "Start document wizard with empty selection and prompt for manual selection" and "Allow to ignore filling the mandatory Ignored Why field in document release process" (1) from the V2020 Command manager setting are now available in the V2023 in the "Wizard settings" group (2).

New exposed property names for revision and status



For new data storages (applies only to data storage created for the first time with PDM Studio V2023), the new exposed properties names for revision and status are now "PDMStudio_Revision" and "PDMStudio_Status" instead of "Smapp3D_Revision" and "Smapp3D_Status" in V2020.

Important: When upgrading from PDM Studio V2020 to PDM Studio V2023, the revision and status names exposed in V2020 do not change!

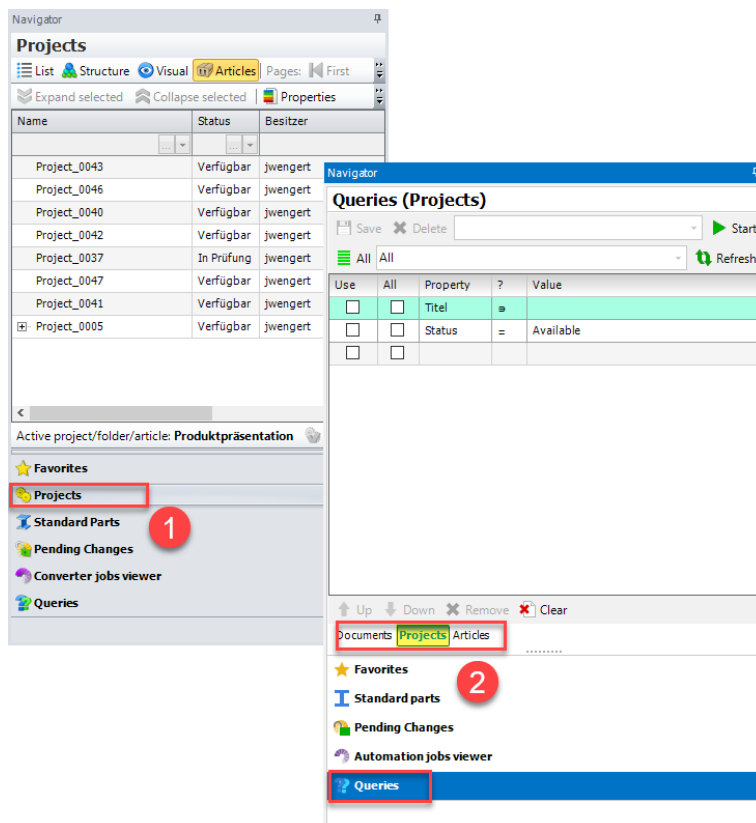
PDM Studio

Updated user interface and new icons

The software's user interface has been updated to provide a more user-friendly experience. With the integration of new icons and the grouping of commands, operation is now more intuitive and efficient.

Details about the changes

Navigator changes



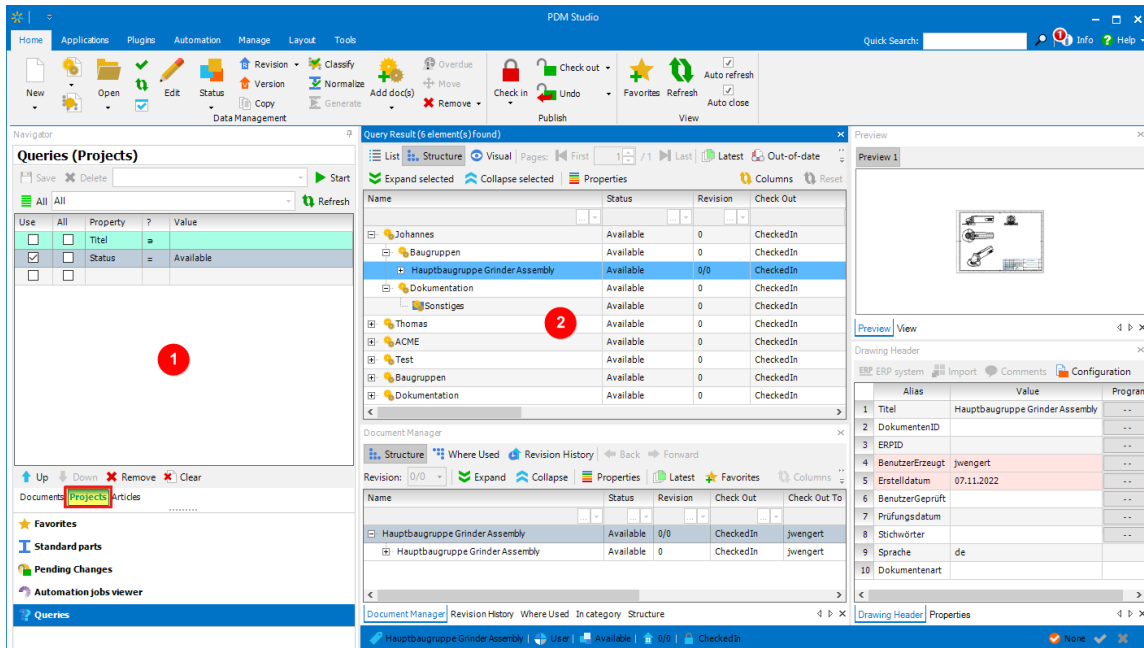
The V2020 Projects tab (1) has been removed from the Navigator in PDM Studio V2023. Instead, the query option has been extended to include projects and articles (2).

In PDM Studio V2023, Projects and Articles are now treated like Documents when queried and can be searched for like Documents. Predefined queries (in the Client Administrator) for Projects and Articles can also be used here just like searching for Documents.

To search for Documents, Projects, or Articles, select the "Document," "Project," or "Article" (2) query tab.

Note: The search criteria that are available to you depend on whether you are searching for - Documents, Projects, or Articles. Only the properties that are valid for those objects are displayed.

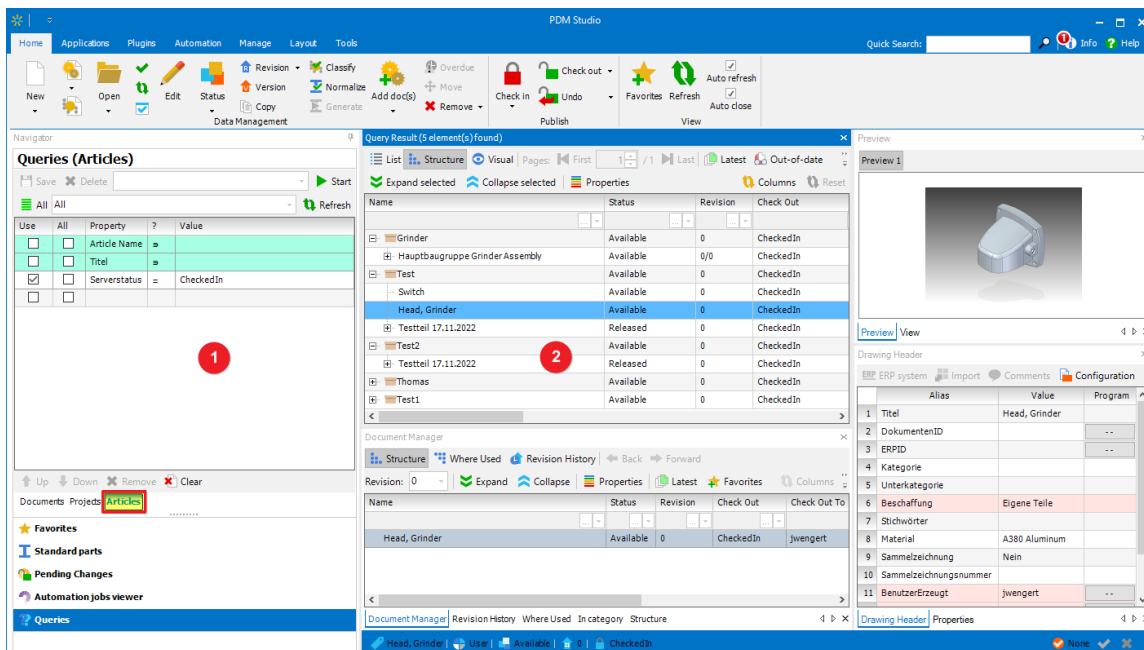
Example Project query



This example shows all **Projects (2)** with the **Status "Available" (1)** as query condition.

See also the topic [Predefined queries](#) in the chapter Client Administrator.

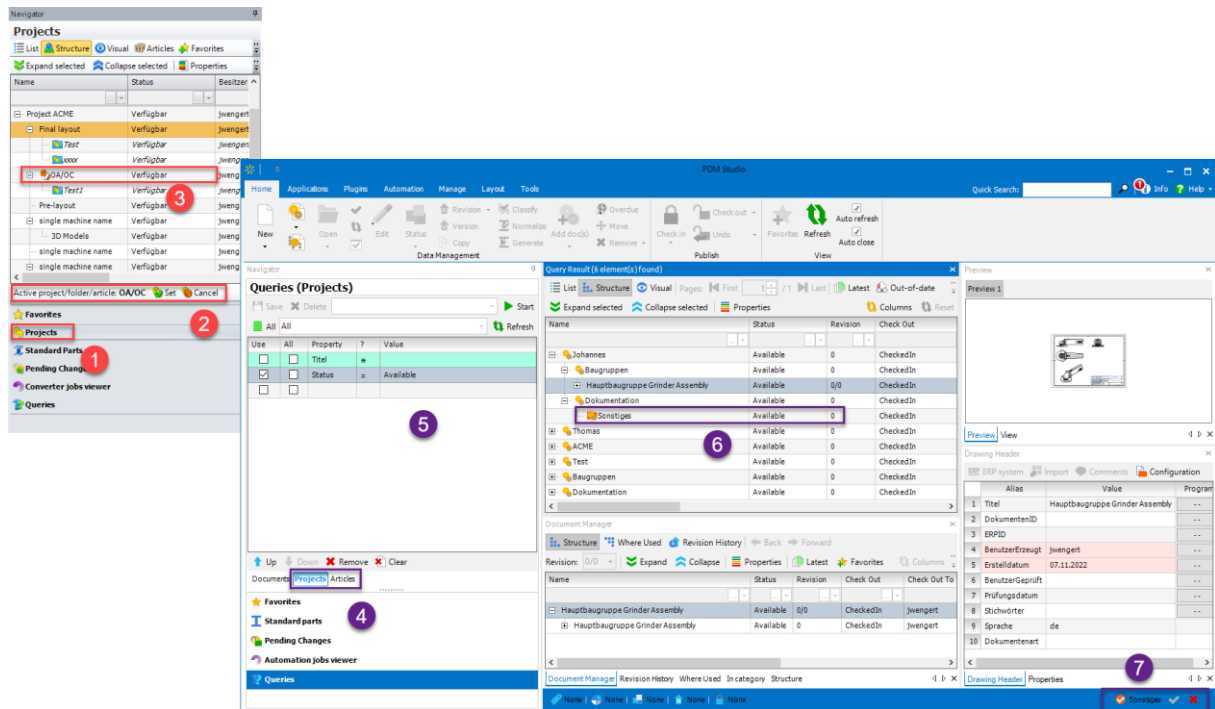
Example Article query



This example shows all **Articles (2)** with the **Server status "CheckedIn" (1)** as query condition.

See also the topic [Predefined queries](#) in the chapter Client Administrator.

Change functionality - Set Project, Article or Folder as "Active"



Due to the standardization of the Project, Article and Folder objects, the "Active" setting of these objects **has also changed** in PDM Studio V2023.

Old: In V2020, the "Active" setting of the respective Project/Folder was done in the "Projects" tab (1). A project or folder was then selected (2) and set to "Active" (3).

In PDM Studio V2023, due to the elimination of the Projects tab, a different way to set a Project/Folder/Article as "Active" is required to simplify and standardize the search.

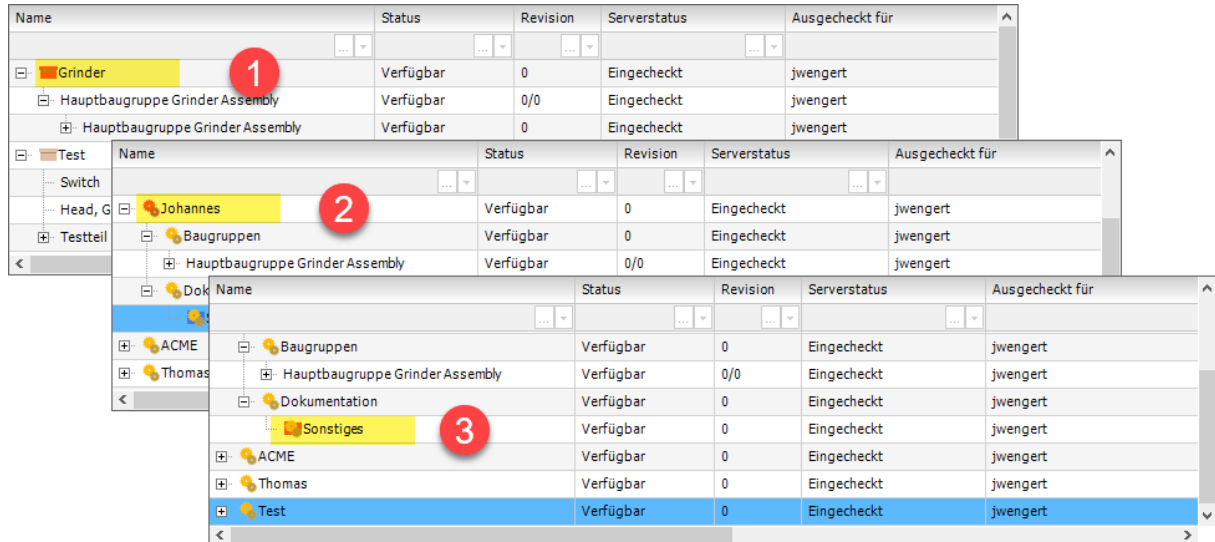
New: Now you select the Project or Article search (4) in the "Queries" tab of the navigator. Start a query (5) to find the desired Project/Article (5). Then select the Project/Article (optionally, select the Folder by expanding the structure) (6).



Finally, click on the green check mark ✓ to mark the Project, Article or Folder as "Active" (7). Click on "Delete" ✗ to remove the assignment. If you move the mouse over the entry (see image on the left), the path to the active Project/Article/Folder (highlighted in yellow) is displayed as a tooltip.

Note: If there is no assignment (no entry behind the orange checkmark ✓), when assigning documents to projects, articles or folders, a wizard will appear, where you can select which Project, Article or Folder you want to assign the document(s) to.

Note: Please note that if no Project, Article or Folder is set to "Active", the Project/Article or Folder will automatically be set to "Active" after the assignment.



Name	Status	Revision	Serverstatus	Ausgecheckt für
Grinder	Verfügbar	0	Eingecheckt	jwengert
Hauptbaugruppe Grinder Assembly	Verfügbar	0/0	Eingecheckt	jwengert
Hauptbaugruppe Grinder Assembly	Verfügbar	0	Eingecheckt	jwengert

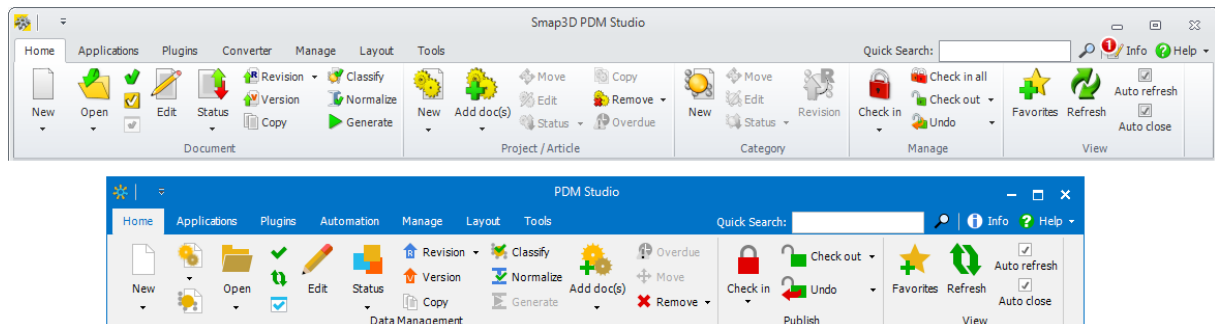
Name	Status	Revision	Serverstatus	Ausgecheckt für
Johannes	Verfügbar	0	Eingecheckt	jwengert
Baugruppen	Verfügbar	0	Eingecheckt	jwengert
Hauptbaugruppe Grinder Assembly	Verfügbar	0/0	Eingecheckt	jwengert

Name	Status	Revision	Serverstatus	Ausgecheckt für
Sonstiges	Verfügbar	0	Eingecheckt	jwengert
ACME	Verfügbar	0	Eingecheckt	jwengert
Thomas	Verfügbar	0	Eingecheckt	jwengert
Test	Verfügbar	0	Eingecheckt	jwengert

The background of the icon of a Project / Article or Folder is **highlighted in red** when it is set to "Active".

In the example (previous images) you can see: **Article set to Active (1)**, **Project set to Active (2)**, **Folder set to Active (3)**.

Changes in the Home tab



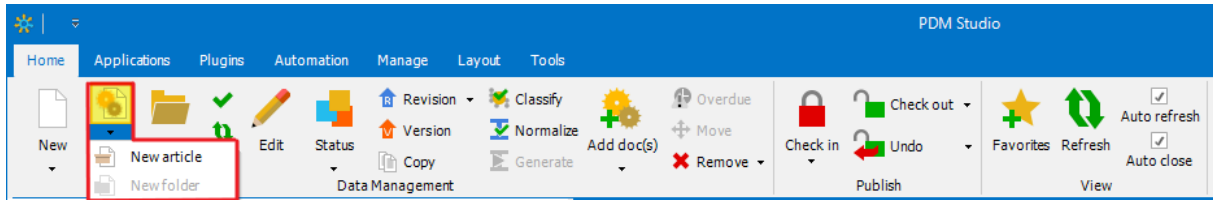
On the "Home" tab, the functions have been regrouped for better clarity.

The former **Document**, **Project/Article** and **Category** groups have been **merged** into the new **Data Management** group. The old **Manage** group has become the new **Publish** group.

Here are the changes in detail.

Group Data Management

New Project, Article or Folder

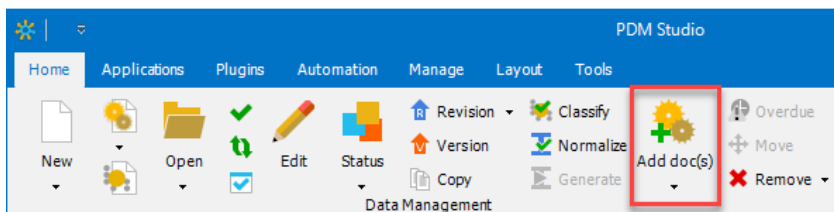
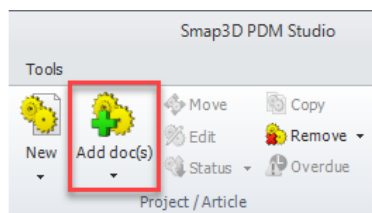


The functions for "New Project", "New Article" and "New Folder" are now integrated into the Data Management group as shown in the picture above.

The first function (marked in yellow) is the "New Project" function. After clicking on the down arrow (in the blue field below New Project) you will find the New Article and New Folder functions.

Note: A folder cannot be created independently but must be part of a Project. However, it is possible to create subfolders within a Project/Article structure. These new folders are located below the parent folder in the hierarchy. The folder is for organizational purposes only and does not contain any metadata. The documents in the folder also belong to the Project / Article.

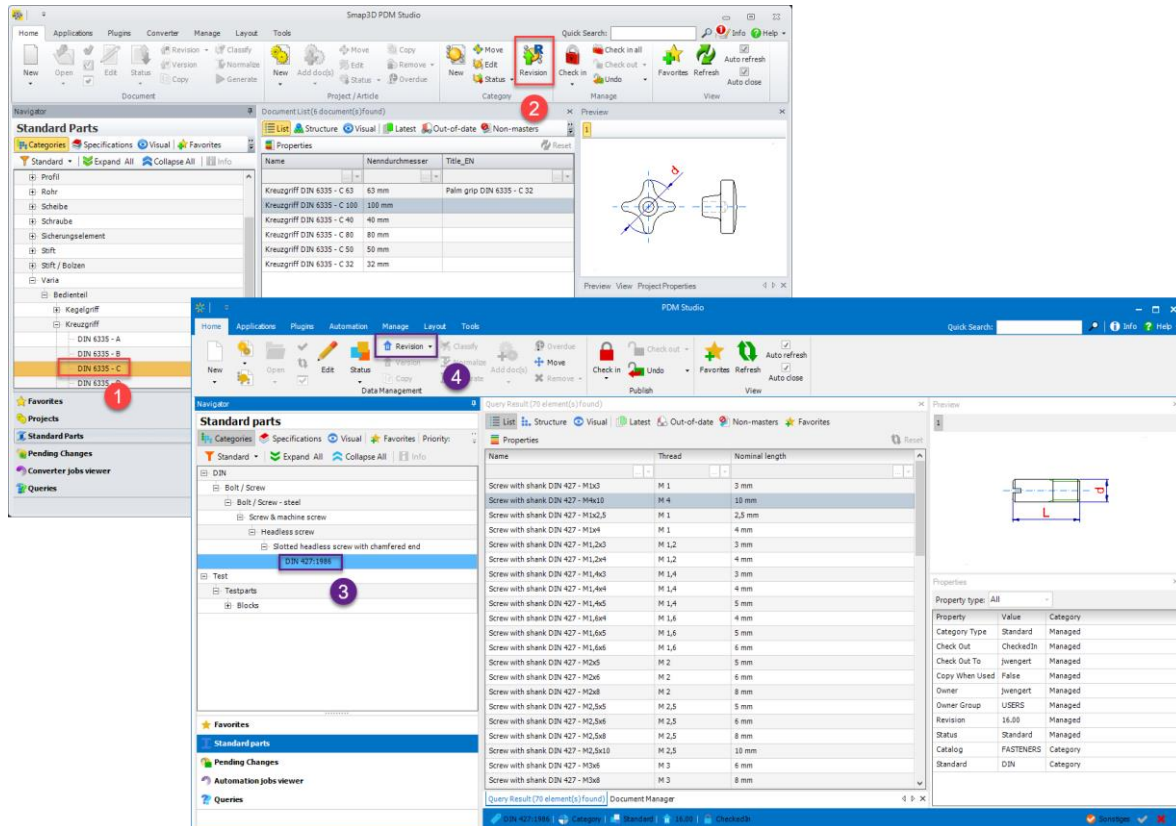
Add document to a Project, Article or Folder



The function "Add doc(s)" available in the Project/Article group in PDM Studio V2020 has been moved to the new Data Management group in PDM Studio V2023. The function has been extended to add documents to Projects, Articles or Folders.

Note: If a Project, Article or Folder is set as "Active", then the document will be assigned directly to the "Active" Project, Article or Folder. If no Project, Article or Folder is set as "Active", a wizard will appear and ask you in which Project, Article or Folder you want to assign the document(s) to.

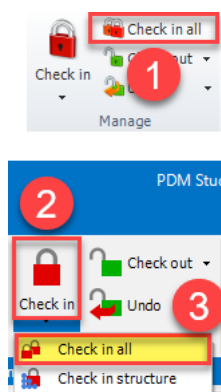
Revision of a Standard Category



The Revision function (2) of a standard category (1) in the V2020 has been merged into the general Revision function (4) of the V2023. There is now only one command for Revision instead of two.

Group Publish

Function Check in all

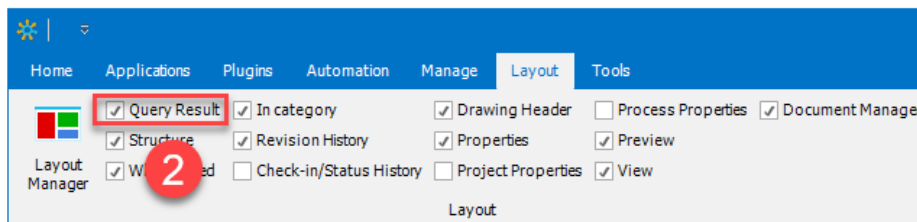
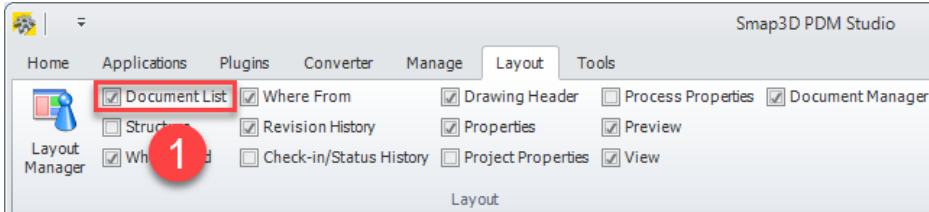


The group name has been changed from "Manage" (V2020) to "Publish" in V2023.

The "Check in all" function (1), which was a stand-alone function in the V2020, has been integrated into the "Check in" function (2) as a sub-function (3) in the V2023.

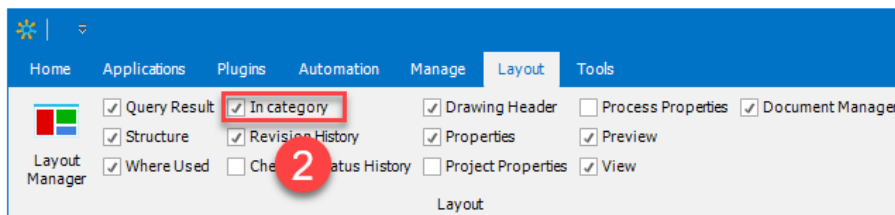
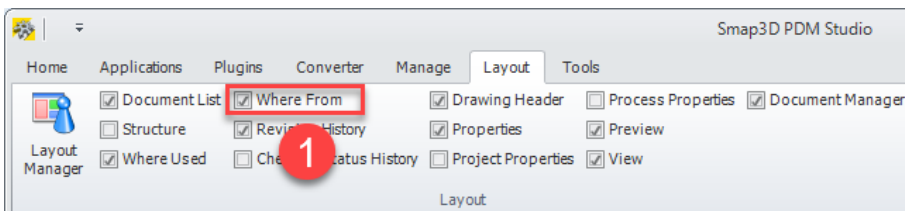
Changes in the Layout tab

Document list turned into Query Result



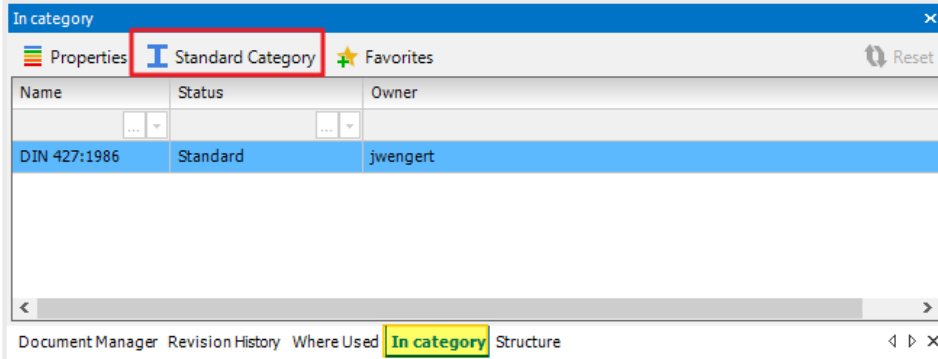
In PDM Studio V2023, the queries have been unified, which has changed the name of the output windows. "Document List" (1) (V2020) became "Query Result" (2) in V2023, as documents, projects or folders are now output depending on the selected query.

„Where From“ gets to „In category“

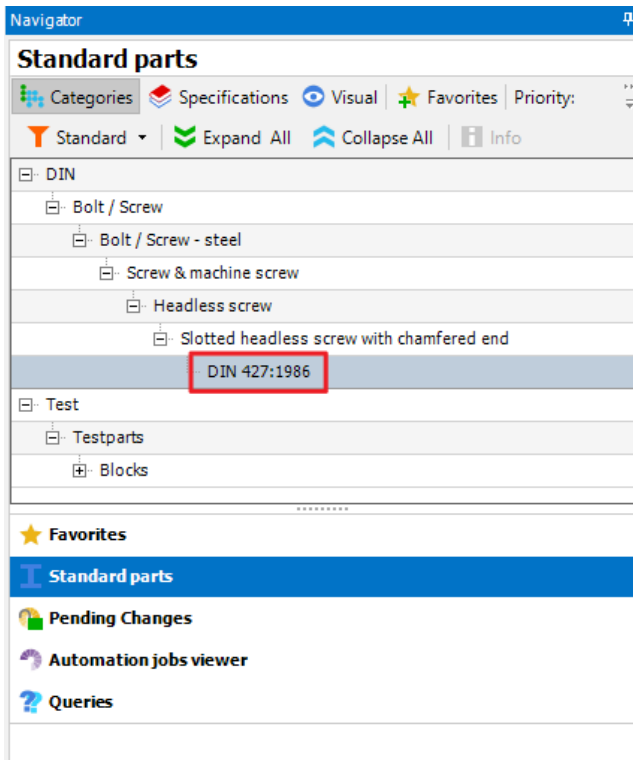


The "Where From" window (1) (V2020) has been renamed to "In Category" (2) in V2023 and now displays only standard parts. Projects and Articles are now displayed in the "Where Used" window.

If a standard part is selected in the “Query Result” window and the “In Category” window is enabled, the standard part is displayed in this window.

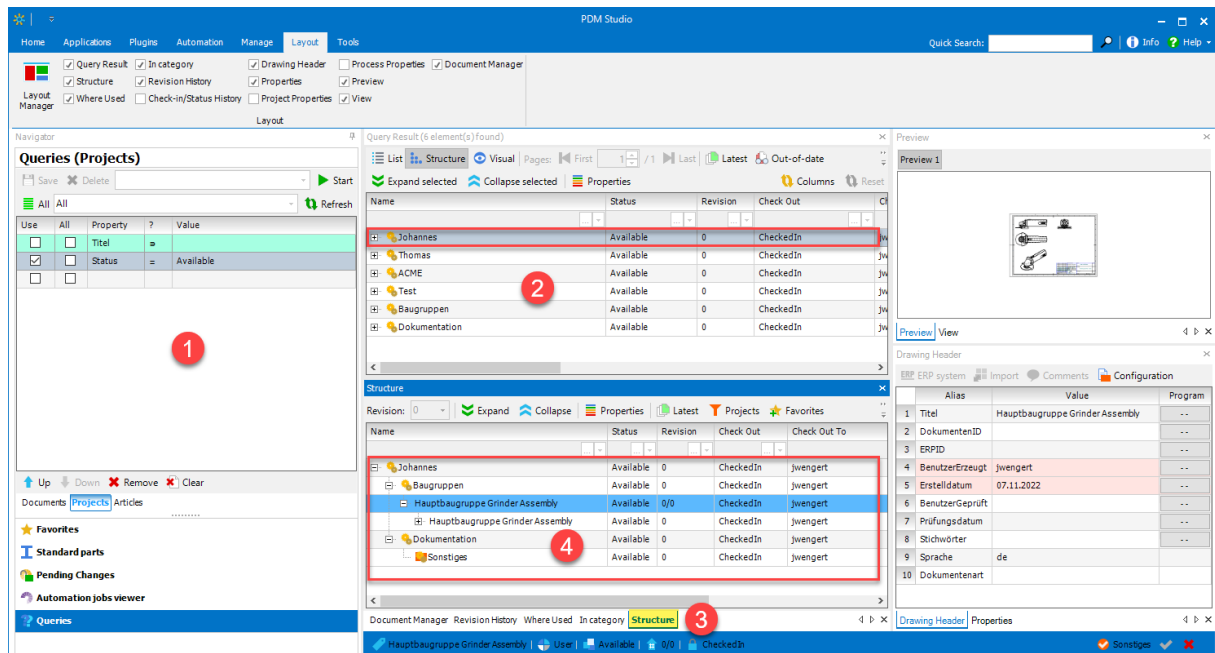


With the “Standard Category” **I** function, the Navigator goes directly to the Standard parts tab and displays the category in which the selected standard part is located.



Display Windows Enhancements

Display window "Structure"



The Structure window in PDM Studio V2023 has been enhanced. It now displays Projects, Articles, and Folders.

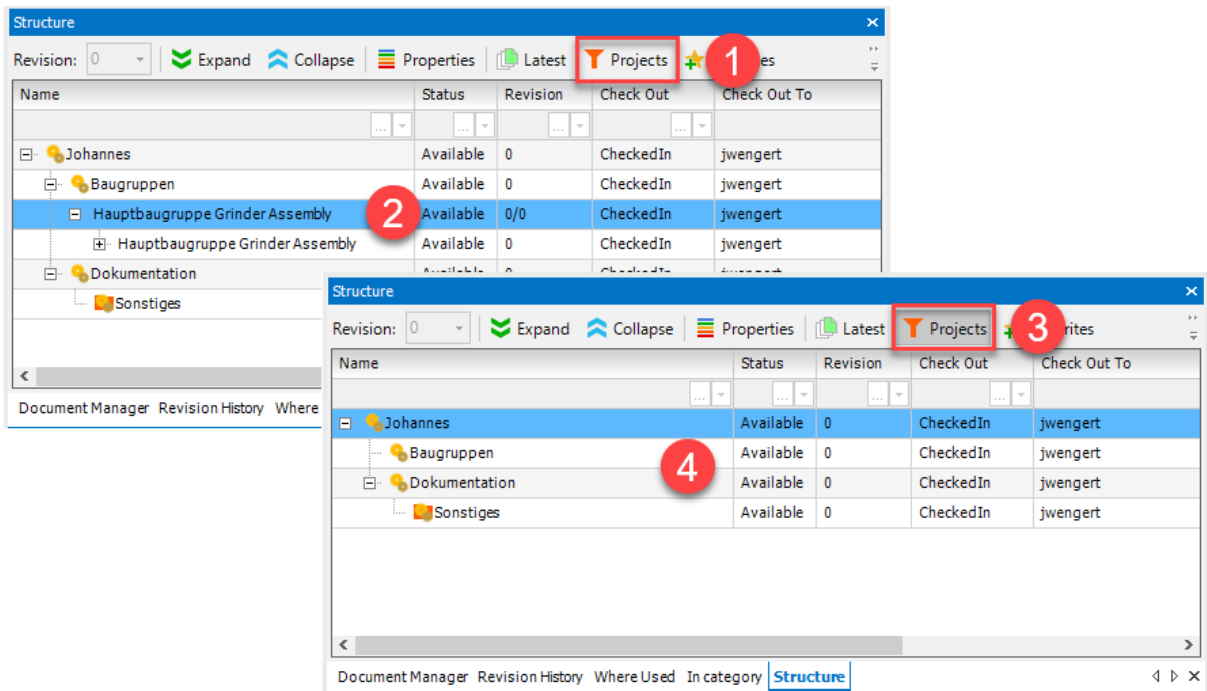
Note: The example shown here (search results for projects) applies in the same way to the search for articles.

After performing a query for Projects/Articles (1) and selecting the Project/Article in the Query Results window (2), the Structure window (3) displays the Project/Article with its structure (4) and the documents it contains.

Function Projects

The "Projects" function (1) is designed **not only for Projects**, but of course **also for Articles**.

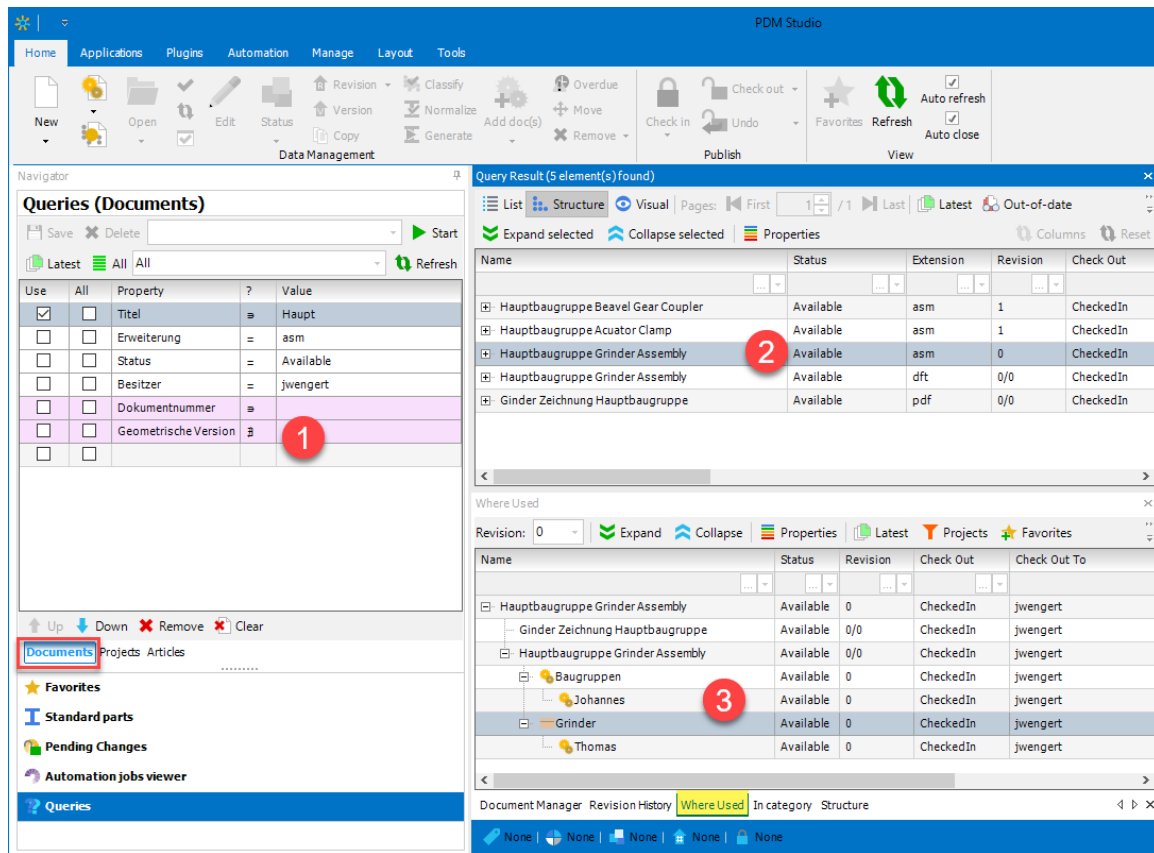
Note: The "Projects" function is only active when searching for Projects or Articles in the queries. It is inactive when searching for documents.



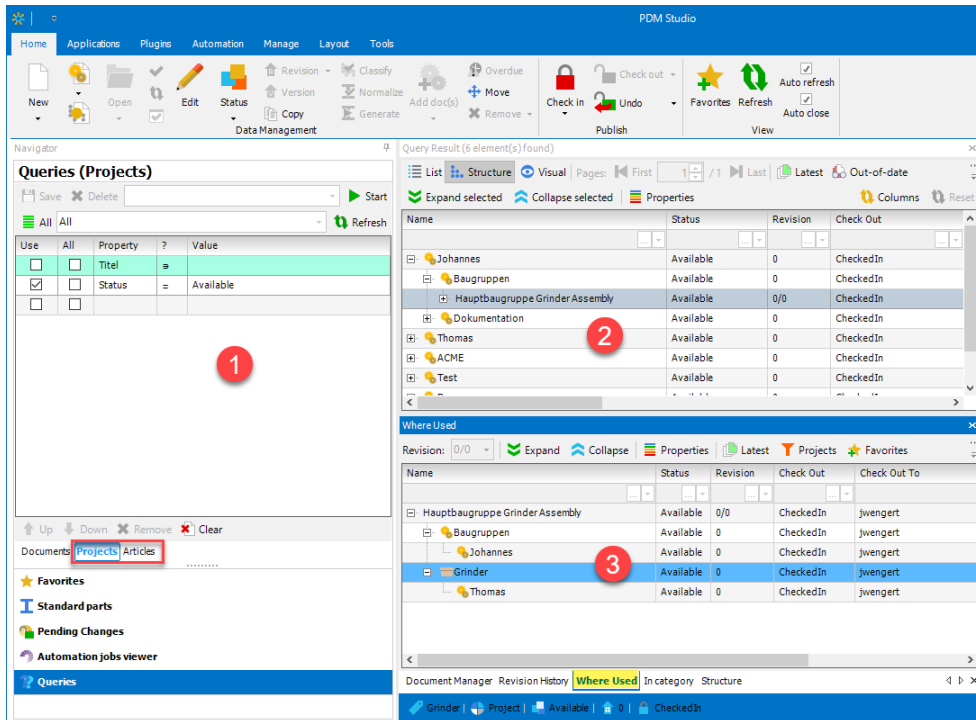
If the "Projects" function is turned off (1), the **whole structure will be displayed (2)**. If the "Projects" function is enabled (3), the **structure objects that do not contain documents are hidden (4)**.

Note: The result (when applied to Articles) is the same as the one described in the previous paragraph for Projects.

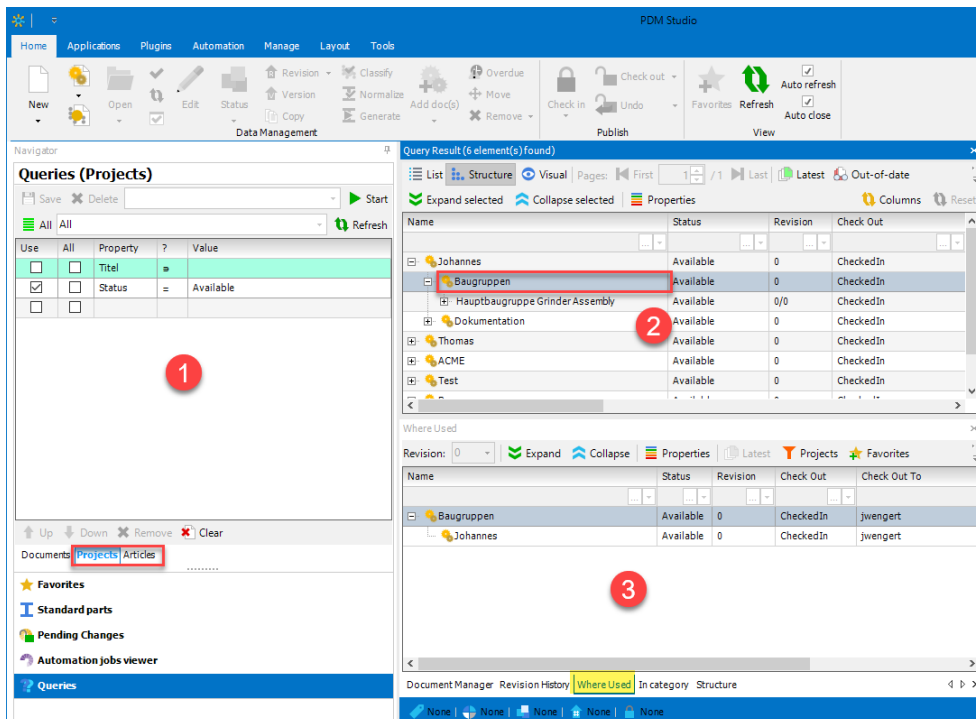
"Where Used" Window



After selecting the **Document (2)** in the document search result, the **"Where Used"** window (3) now supports displaying the **Projects, Articles, and Folders** in which the Document is used.



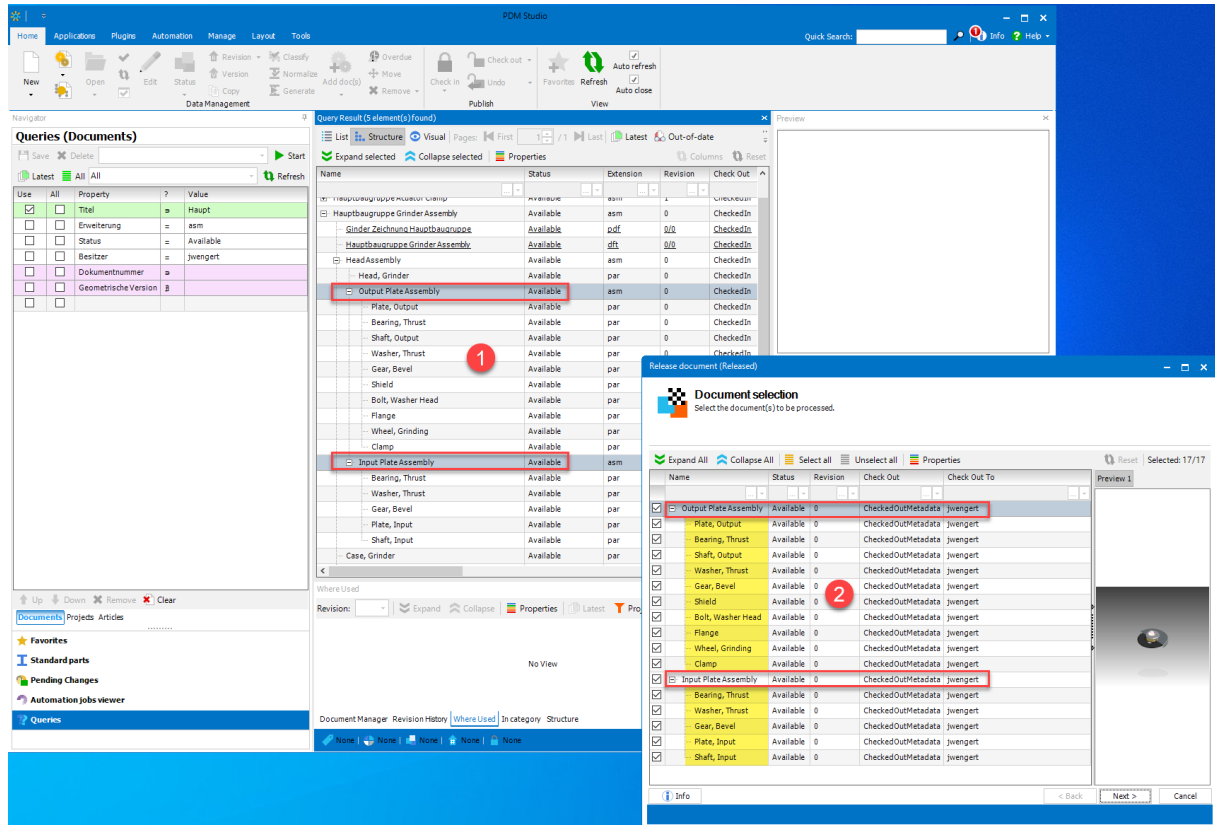
The "Where Used" list (3) in the Project/Article Search (1) will give you the same result as the Document Search when you select the document in the query result (2).



After selecting a Project or Article in the Query Result (2), the "Where Used" list shows you in which Projects/Articles (3) it is being used.

Multiselection

In PDM Studio 2023, the ability to select more than one input document has been introduced in a number of Wizards.



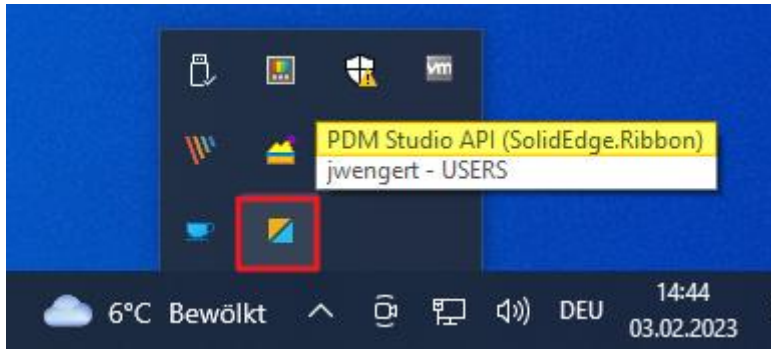
The figure shows an example in the Release Wizard. In the query result, **two assemblies (1)** are selected as input documents. Both documents are then released. **In the Release Wizard, the two selected assemblies are displayed with all their components (2)**. Now they can be released in one step.

Multiple selection of input documents is now supported in the **following wizards**:

- Status change
- Release
- Revision
- Revise where used
- Single revision
- Classify
- Recycle (via status change)

API

Changing the username for the API connection



With **PDM Studio version 2023** a new icon for the API connection has been introduced and the **API user has been changed** from "smap3d.api" to "pdmstudio.api".

Other (Technotes)

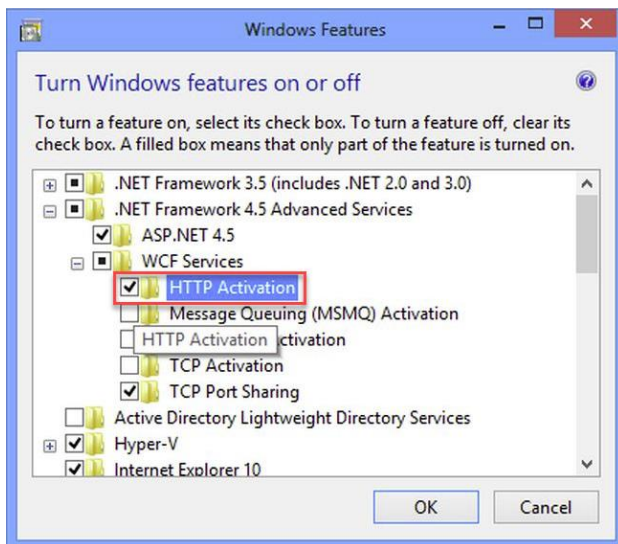
General

In the Windows update process, the Microsoft .NET Framework will also be updated to the latest version 4.8.

However, Microsoft .NET Framework 4.8 contains a bug that causes - with installed Freeplugins - Client Administrator and PDM Studio to crash on startup. The error occurs exclusively after upgrading to .NET 4.8.

According to our research, this error is already known at Microsoft and affects very many software products from other manufacturers. We cannot currently estimate when Microsoft will fix the problem.

However, there is a direct solution to the problem:



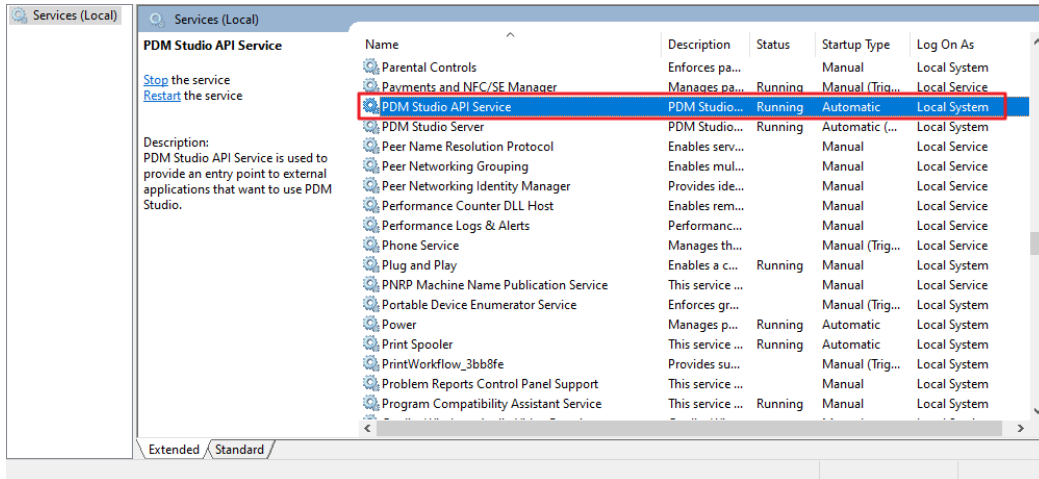
If the **Microsoft .NET Framework 4.8** is installed, go to the **Windows Features** in Windows Settings, and open the "Turn Windows features on or off" settings.

The "Windows Features" dialog appears. **Check the "HTTP Activation" option in the ".NET Framework 4.8 Advanced Services"**.

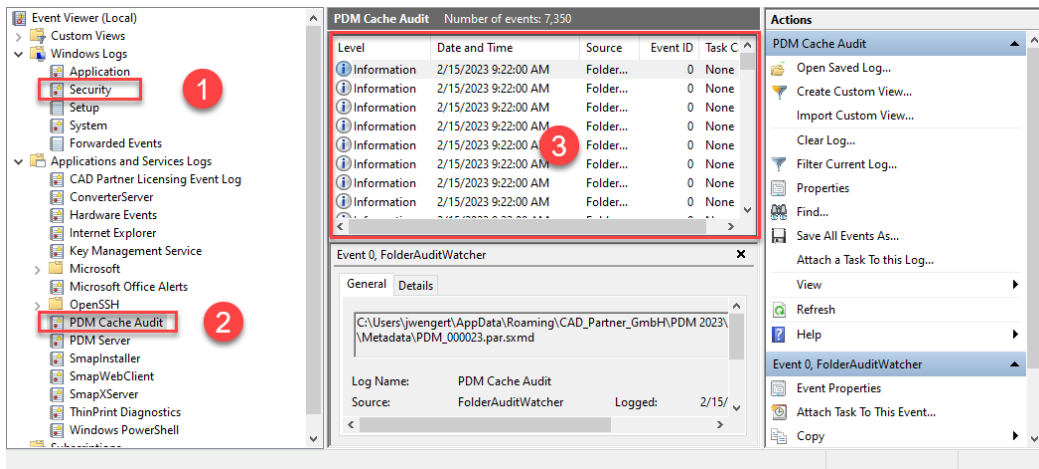
After that, all PDM application should work again without problems.

Message Cache monitoring could not be initialized

The PDM Studio core contains an enhanced cache monitor that provides developers and administrators with improved analysis capabilities. However, in rare cases, cache monitoring may fail to start automatically (see below for details).



The responsible source process is the "PDM Studio API Service" service.



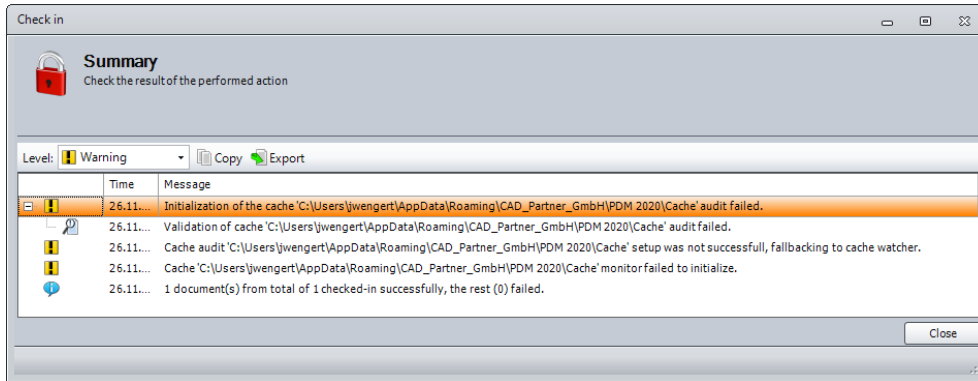
The most important point is that the PDM Studio API service **MUST** have access to the "Security" event log (1).

Technically, the Cache Monitor listens to the audit events from the "Security" event log, and if they come from the local cache folder, it copies them to the "PDM Cache Audit" event log (2) output window (3), which is then picked up by PDM Studio (and other PDM client applications) and used to monitor the cache.

Background: The reason for this procedure and the cause of the following message in PDM Studio is that the security event log is only accessible with elevated privileges ("Administrator"), which PDM client applications normally do not have

This new monitoring of the cache usually configures itself automatically during installation.

However, depending on the company's permissions system, this may not succeed (because the workstation does not have the necessary rights) and the following error message will appear in PDM Studio:



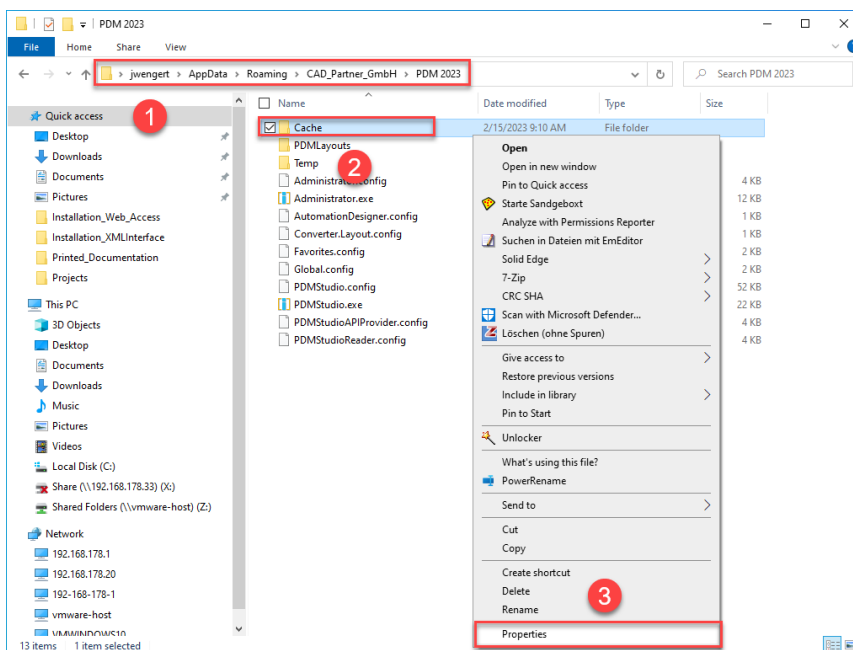
Important: This is because the company's security policy cannot be changed directly from the workstation, but is controlled globally by IT.

There is nothing to worry about in this case, it basically just means that the new "cache monitoring" functionality has been disabled and the software will work in a standard mode.

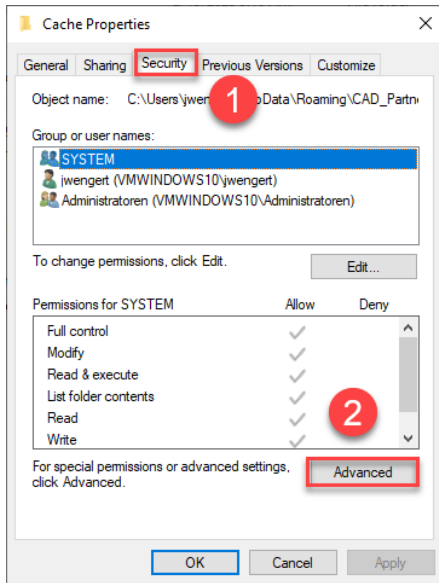
If this happens, check the following Windows settings.:

Go to the directory "PDM 2023" (1) of your workstation.

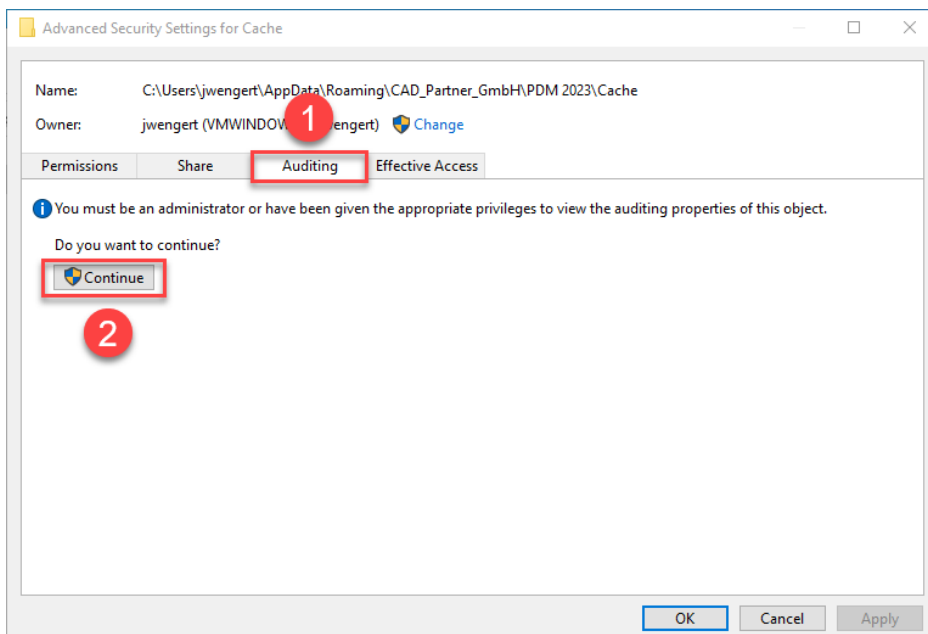
Usually: "C:\Users\[User]\AppData\Roaming\CAD_Partner_GmbH\PDM 2023"



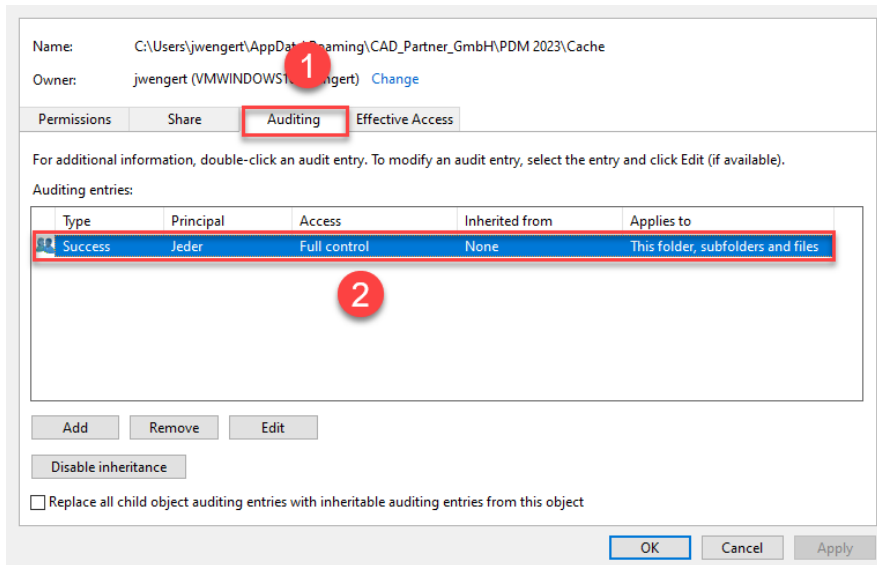
Right-click on the "Cache" folder (2) and select the "Properties" (3).



In the properties of the "Cache" directory, switch to the "Security" tab (1) and then click to the "Advanced" (2) button.

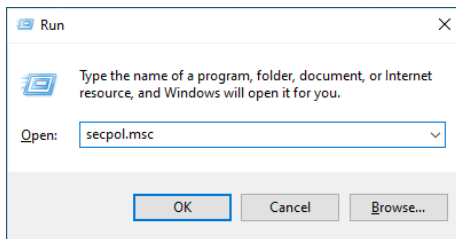


In the "Advanced security settings" of the cache directory, select the "Auditing" tab (1) and then click Continue (2).



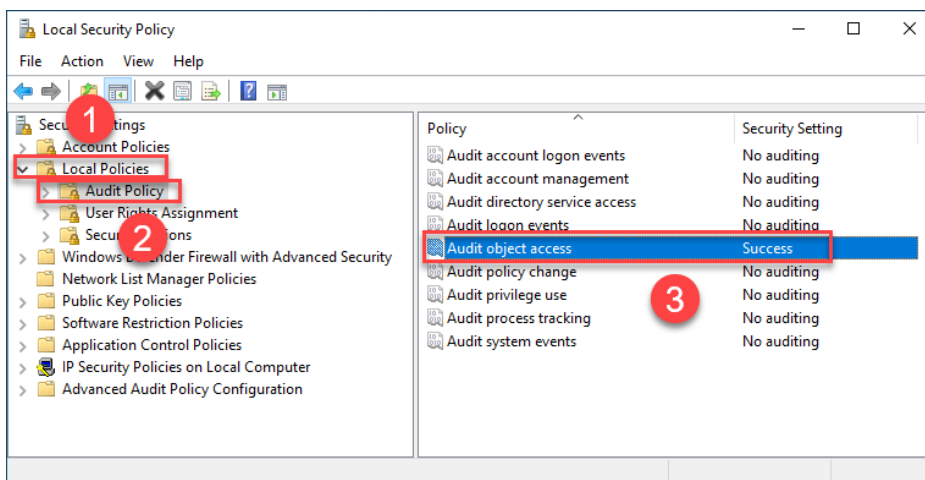
Go to the "Auditing" tab (1). In order to be able to monitor successful access to the cache folder and all its subfolders and files, "Full control" (2) over this folder and all its subfolders and files **MUST** be configured for everyone without any restrictions. If this is the case, then everything is fine here.

In the next step, start "Run" with the Windows key combination "WIN+R" as an administrator.

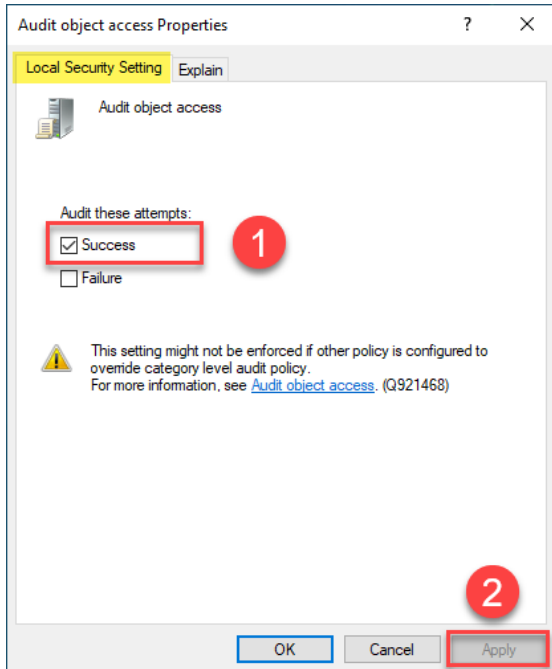


Then enter the command "secpol.msc". The Local Security Policy will be started.

Important: Please note that you need "Administrator Privileges" for this function.



Go to the "Local Policies" (1) and navigate to the "Audit Policies" (2). Open the "Audit object access" option (3) by double-clicking on it.



The "Audit object access Properties" will be opened. The "Success" (1) option must be checked here.

If this is not the case, tick the "Success" (1) option and "Apply" the change (2).

The new cache check should work correctly, and the message should no longer appear in PDM Studio if both settings are set as described above.

Important: It is possible that the security policy is reset by Windows during the installation process after a Windows update. In this case, PDM Studio will report the error again and you need to re-enable the "Monitor object access attempts properties" again.

Disabling cache monitoring

Cache monitoring can also be disabled by adding the following setting to the "Global.config" file in the `C:\Users\[USER]\AppData\Roaming\CAD_Partner_GmbH\PDM 2023` directory. Add the following line to the file:

```
<setting name="DisableCacheMonitor" serializeAs="String" IsNull="false">true</setting>
```


Installation

Plugins in general:

Some words about custom plugins, specially written for you.

If you have custom plug-ins developed especially for you, please check with our support team before installing them to ensure they are compatible with the version of PDM Studio you are installing.

After Installation

General

Important: Updated Free- and Freeconverter plug-ins may be required with each maintenance pack for PDM Studio version 2023.

An update of the Free and Freeconverter plugins is also required when upgrading from V2020 to V2023.

The updated/last available plugins are located in the file "CADpartner_FreePlugins_V2023-MPxx.zip" in the directory "\\Plugins" of your installation files.

Please contact our support if necessary if you are using specific custom plugins. Usually, we only need to recompile them for the specific Maintenance Pack of PDM Studio V2023 and can provide them along with the FreePlugins.

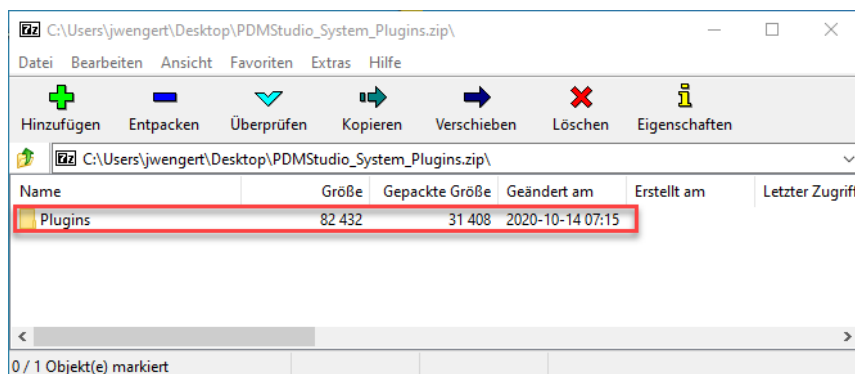
For more information on installing the Free- and Freeconverter plug-ins, refer to the Installation Plugins chapter in the "PDMStudio_Installation_2023_EN.pdf" document.

Add - Add-On Tools

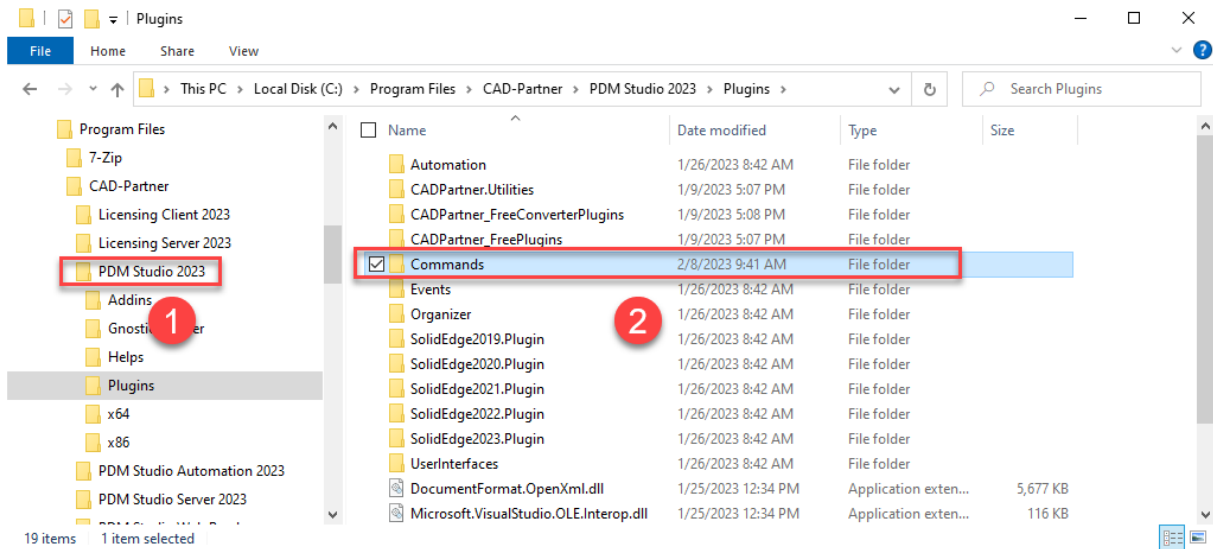
The "Unmanaged Export" function is not included in the installation package of the standard software and must be installed separately after installing the 2023 version.

Go to the "\\Plugins" directory of your installation files. There you will find the zip file "PDMStudio_System_Plugins.zip". This zip file contains the new function described above.

Open the zip file.



The zip file contains the **Plugins folder**.



Copy the entire "**Plugins**" (do not change into the folder) folder to the main directory of your PDM Studio client installation - usually "**C:\Program Files\CAD-Partner\PDM Studio 2023**" (1).

The folder will be automatically integrated into the Plugins folder (usually "**C:\Program Files\CAD-Partner\PDM Studio 2023\Plugins**") of the installation directory (2).

Note: The contents of the folder will overwrite the previous files when updating within PDM Studio V2023.

The new "**Commands**" folder is now available in the Plugins directory (or updated, depending on whether you are updating within V2023 or upgrading from V2020).

The feature is now available.

Client Tools

In addition to the general plugins, you will find the zip file "PDMStudio_Client_Tools.zip" in the directory "\Plugins" of your installation files. This zip file contains the "SmapX.Client.Tools.dll" file. This DLL contains special functions for the PDM Studio Client Administrator application.

Copy the DLL "SmapX.Client.Tools.dll" into the installation directory of your PDM Studio installation "C:\Program Files\CAD-Partner\PDM Studio 2023".

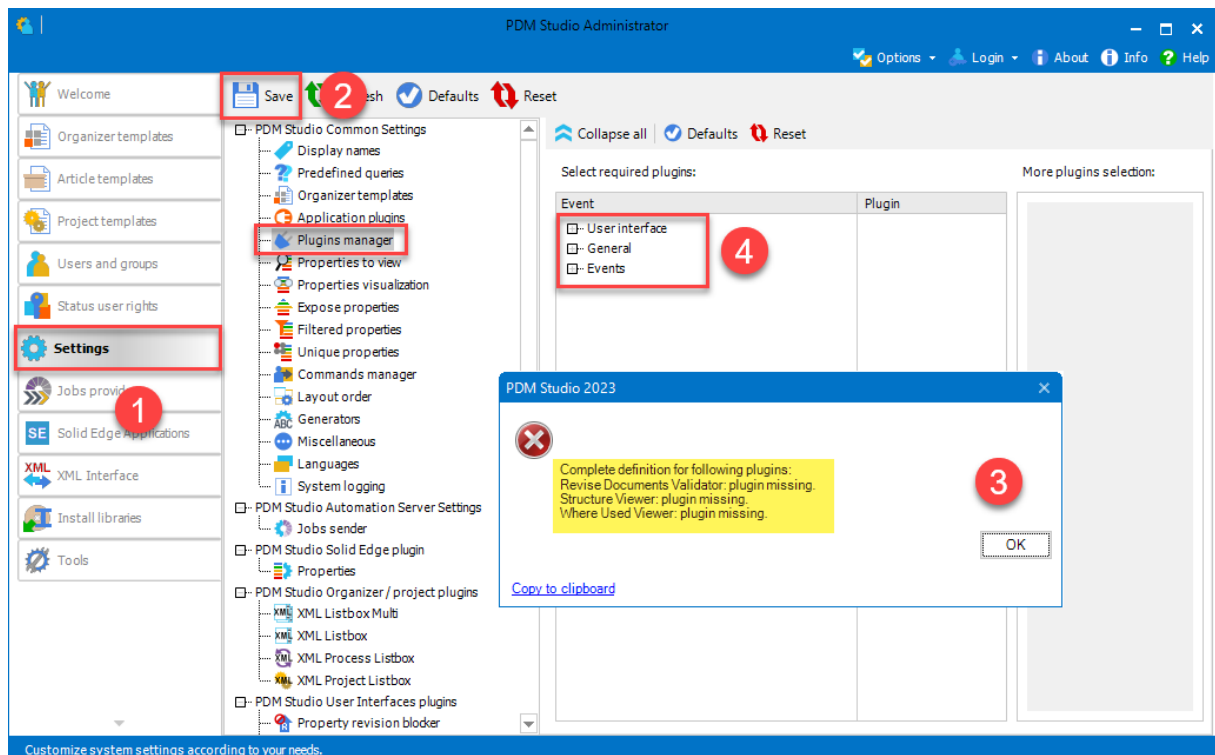
Note: The "SmapX.Client.Tools.dll" contains functions specific to your company's PDM Administrator. Therefore, it must be copied ONLY once to the PDM Administrator's computer. If you need to use these special functions - our support will inform you.

Each Maintenance Pack contains an updated "SmapX.Client.Tools.dll" suitable for that Maintenance Pack. It has to be copied to the above-mentioned directory after each installation of a new Maintenance Pack and it will overwrite the existing one.

Setup Client Administrator

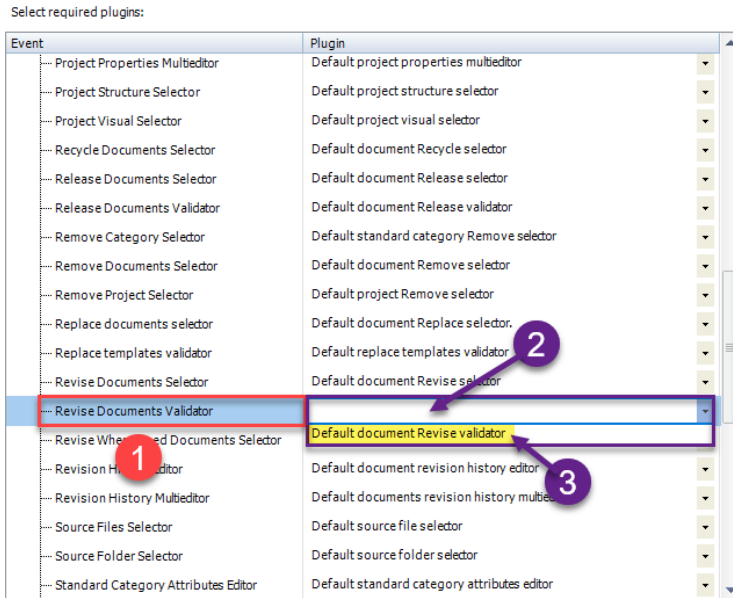
Each installation may also bring new settings to the Client Admin. You will need to manually configure these settings.

Very important: After the installation, please start the Client Administrator, go to Settings (1), and click Save (2).



There may be some messages (3) (you will be directed to the location (Plugin Manager) (4) of the missing Plugins) about missing Plugins. These messages prevent you from saving the settings.

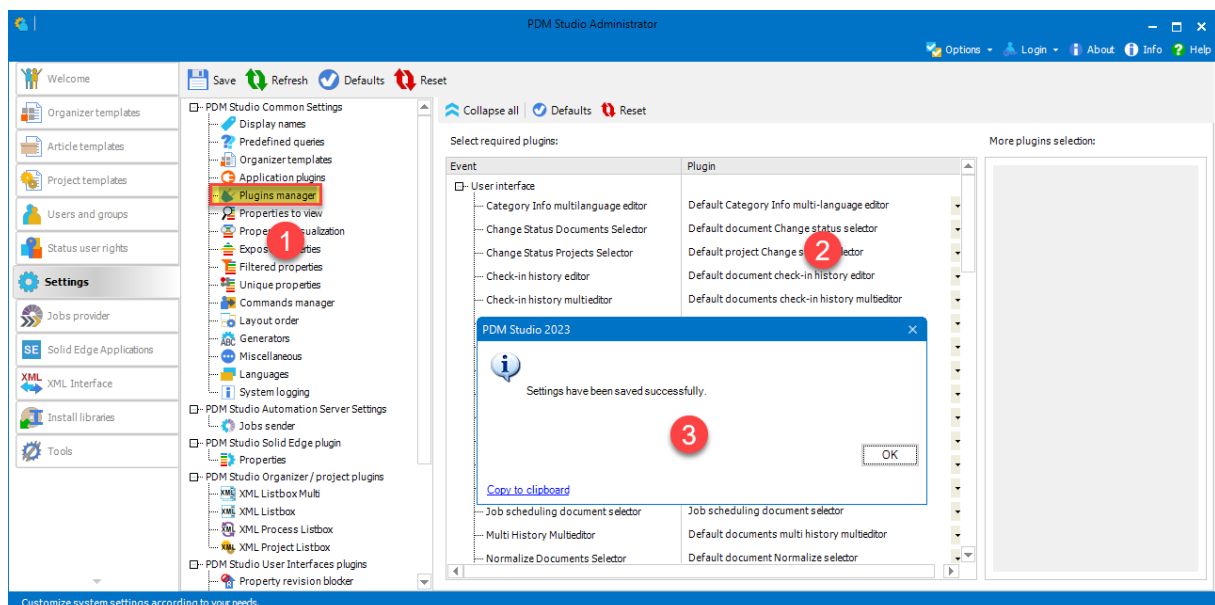
Expand the Event where the Plugin is located, in our example "User interface" and scroll down until you see the mentioned Plugins (image above (3)) "Release Documents Validator" (image below (1)).



Fix these missing settings (indicated by empty entries in the respective "Plugin" column (2) of the corresponding "Event" (1)) and assign the Plugin (3) from the pull-down menu to the missing events and click "Save" again.

Important: You cannot "Save" the settings until all the necessary settings are set correctly.

If ALL settings (2) are saved correctly in the Plugins Manager (1), you will see the message "Settings have been saved successfully" (3).



Other enhancements/improvements/changes/fixes/bugs

Enhancements:

Module	Description
BOM Studio Integration	Created new application plugin for BOM Studio 2022
Inventor Integration	Added possibility to define separate predefined queries for documents, projects, and articles
Inventor Integration	New more modern design icons including new application icons.
Migration	Introduced new Automation Save As plugin.
NX Integration	Introduced a generic support for managing BOM information together with managed document.
NX Integration	Complete migration settings are available now on the main Migration dialogue. No configuration files are necessary created.
PDM Server	Introduced new Automation Save As plugin.
PDM Studio API	Introduced a generic support for managing BOM information together with managed document.
PDM Studio Reader	Added support of MS SQL 2022.
XML Interface	Introduced Project queries via new Project Query builder in Navigator.

Improvements:

Module	Description
General	Improved logging during system initialization. Logs are not lost when connection to the PDM Server fails.
PDM Server	Restore database processes are logged in event viewer.
PDM Server	Unsuccessful start of PDM Studio server is logged now better.
PDM Server	Enlarged logging of PDM Studio Server facade methods to log file.
PDM Studio	Unified displayed status in Client Settings and Effective Rights dialogue in PDM Studio
PDM Studio	Unified titles of Edit project / article properties wizard step for single and multi editing.
PDM Studio	Improved the validation of cycles in revise wizard. Mainly for more non-structure links in the displayed structure.
PDM Studio	Improved the warning message about removing parent documents.
PDM Studio	Improved preselection of query search result in Import command of Organizer editor. All documents are unselected by default.
PDM Studio API	Improved the GetSmap3DSettingsAsync API method for 'NotDeletedCustomProperties' and 'DeletedCustomProperties' fields.
Server Administrator	Improved setting of the "Increase timeout during the restore db" option. Option is available now before starting a restore process via Clone command.
User Interface Plugin	Improved the "Property copy blocker" plugin with possibility excluding invalid and obsolete documents from selection.

XML Interface	Added support for working with exposed properties.
XML Interface	XML Interface has better memory management and can disable preview retrieval

Changes:

Module	Description
General	Renamed the article property Revision Number to Article Revision Number.
General	Removed leasing of PDM Studio MS SQL connection license. Connection license is not necessary anymore.
General	Renamed and unified event log names for PDM and Automation Server.
Installation	Separate migration libraries from client installation. Migration libraries are installed on demand.
Migration	Migration from Smap3D PDM 9.6 and from Solid Edge Insight are not longer supported including delta migration.
PDM Studio	Links of out-of-date documents are now disabled in Revise document wizard.
PDM Studio	Moved Actual Project/Article/Folder management to PDM Studio status bar
PDM Studio	Removed redundant italic displaying of project folders
Server Administrator	Hidden RDBMS controls because only MS SQL database is supported
XML Interface	Modify and fix history data specification for XMLI. Opening previously revised non-master document fails.
XML Interface	External check-in-out command works with whole structure and not only with selected document.
XML Interface	XML Interface is minimizable to the taskbar system tray

Repaired Bugs:

Module	Description
Automation Designer	Fixed loading big automation files with a lot of filter documents plugins.
Automation plugin	Fixed validation when PDM Studio installation missing and Select from PDM Studio plugin is activated.
General	Unified date format (invariant culture) in logging files.
Installation	Fixed customization of XMLI installation. Selection of supported applications did not work correctly.
Installation	Fixed installation of P&ID application plugin in Automation setup.
Log Reader	Fixed sorting by datetime in Log Reader application.
Migration	Fixed an error when the optional tag PropertyChanges is missing.
Migration	Fixed migration of documents without Revision / RevisionChainID specified in metadata.
MSO integration	Fixed exposing properties to MS Office documents.
NX integration	Fixed sending the XMLI replace command.
P&ID integration	Fixed the data specific issue when an opened assembly is destroyed after check-in process via SE PDM Ribbon bar.

Part Keeper	Fixed removing language from edited standard parts in unmanaged mode.
Part Keeper	Fixed empty values validation in Part Keeper multi-editors,
Part Keeper	Removed redundant error message during importing data from Excel table to Part Keeper when there is no Category Info in files.
Part Keeper	Empty value in Organizer and properties editor of Part Keeper should not be considered an error.
Part Organizer	Fixed validation for global unique custom properties. It did not work when the name of the property has the same as its value.
PDM Server	Fixed session views working with removed documents.
PDM Server	Fixed dividing stored files between data storage sub-folders by Server Administrator settings.
PDM Server	Fixed missing project links to documents placed directly to project folder in special situation (document must be in more projects). Fix is performed after the first PDM Studio Server start.
PDM Server	Fixed the right database schema migration for databases created in PDM Studio 2017 and lower.
PDM Server	Fixed restoring database from data storages created in PDM 2020 MP9 and lower.
PDM Studio	Added a missing permission check when a new standard category is created. Currently a user is warned about missing permission at the start of New Standard Category wizard instead at the end.
PDM Studio	Added tooltips to standard and foreign documents in validator in normalize wizard.
PDM Studio	Fixed sorting of standard categories structure. It did not work properly for sub-categories.
PDM Studio	Fixed a hidden exception when selected projects are switched in Project Browser in special situation.
PDM Studio	Fixed behavior of replacing templates when a project and also article are selected together
PDM Studio	Fixed filtering of the standard category documents by 'latest' revision.
PDM Studio	Fixed enabling document that having link out of structure in Restore wizard document validation.
PDM Studio	Fixed replacing part correctly during checking-In/out process in import wizard
PDM Studio	Fixed edit of the properties during recycle of the document.
PDM Studio	Introduced a new exposed custom property with prefix <T> contains the last revision history entries.
PDM Studio	Fixed creating articles.
PDM Studio	Fixed an exception when an article is selected in specific situation.
PDM Studio	Fixed exposing revision history to drawings when only the latest one has been exposed and next ones has been ignored.
PDM Studio	Fixed removing non-structure links in Remove document wizard. Links are currently kept.
PDM Studio	Fixed an exception when Update wizard processed only part of displayed structure (e.g. part without assembly) and parent document of selected has working status.
PDM Studio	Fixed non-structure links cycle detection in Revise wizard

PDM Studio	Fixed a performance wizards issue with reading document parents.
PDM Studio	Fixed selection rules in Revision and Update wizard for non-master documents.
PDM Studio	Fixed validation for non-master documents with out-of-date structure links.
PDM Studio	Fixed an exception in navigation in Update wizard for Back-and-Forth buttons.
PDM Studio	Fixed validation of Revise document wizard for connections (system links) if there are in the cycle.
PDM Studio	Fixed an exception when moving folders inside articles.
PDM Studio	Fixed importing standard parts with different revisions when one of them was removed before.
PDM Studio	Removed doubled raising 'Starting' event in Release document wizard.
PDM Studio	Fixed an exception for Remove and Recycle wizards when selected structure contains duplicities.
PDM Studio	Fixed selection document's cycles via non-structure documents for Revise where used document and Update where used document wizards.
PDM Studio	Fixed relinking copied documents via Copy command for SOLIDWORKS assemblies
PDM Studio	Added missing logging about starting of Move standard category wizard and also to Visual navigation wizard.
PDM Studio	Fixed validation of moving documents to folders. Check if all documents to add are already in target project.
PDM Studio	Fixed changing the main dialog user interface color style when Part Organizer is started.
PDM Studio	Fixed getting a problematic job from Automation Server queue description for right logging.
PDM Studio	Fixed moving folders in associated project. It fails when sub-folder has been moved to project root.
PDM Studio	Fixed displaying the process properties step in the New document wizard that is currently visible for adding a new document to article.
PDM Studio	Fixed an exception when pressing specific keys on empty grid view.
PDM Studio	Fixed deleting a document from a project folder during changing the document status to Removed. Document stayed in folder and its status could not be changed to Removed again after recycling.
Server Administrator	Added publisher for Administrator application for UAC message.
Solid Edge integration	Fixed destroying assembly structure in check-in-out process in special situation.
Solid Edge integration	Fixed modifying of application (Document Number, Revision Number and Project name) properties in unmanaged mode of Part Keeper.
XML Interface	Fixed sending and creating a new document from data template.
XML Interface	Fixed refreshing PDM Studio correctly after check-in-out command from external application.
XML Interface	Applications starting the XML.Interface.exe can correctly identify when it is operational.
XML Interface	Fixed an exception when Part Keeper loading selected data.
XML Interface	Fixed an exception during managing of the revision history properties with whitespace characters in values.

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