PDM Studio

What's new 2023 |EN| MP 03

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Introduction

PDM Studio 2023 MP03 is a maintenance release of PDM Studio. It contains mainly bug fixes and some enhancements.

The major items are described in detail in the following sections. Any other items not listed in detail are described in the Enhancements/Improvements/Changes/Fixed bugs section.

*Note: Please also read the document "**ReadmePDM2023MP03.txt**" in the "**Documents\EN**" directory of your MP03 installation files. This document lists the ticket numbers of the solved tickets in MP03.*

For more information on **how to install the V2023 MP03**, please read the following document:

"PDMStudio_Installation_2023_EN.pdf"

Important: After installation, see the notes in the „Setup Client Administrator" topic.

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

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 MP03.

Installation

Important: We strongly recommend that you check in all documents and clear the local cache on all clients before installing PDM Studio V2023 MP03.

Important: All client applications such as PDM Studio, Solid Edge and the Automation Server MUST also be closed. We recommend that you back up your data storage before any update.

PDM Studio Server Administrator

Check and fix missing previews

For some documents, the previews in PDM Studio may not be displayed. For this reason, a new maintenance tool has been integrated into the PDM Studio Server Administrator, which can be used to check and correct the previews in the data storage.
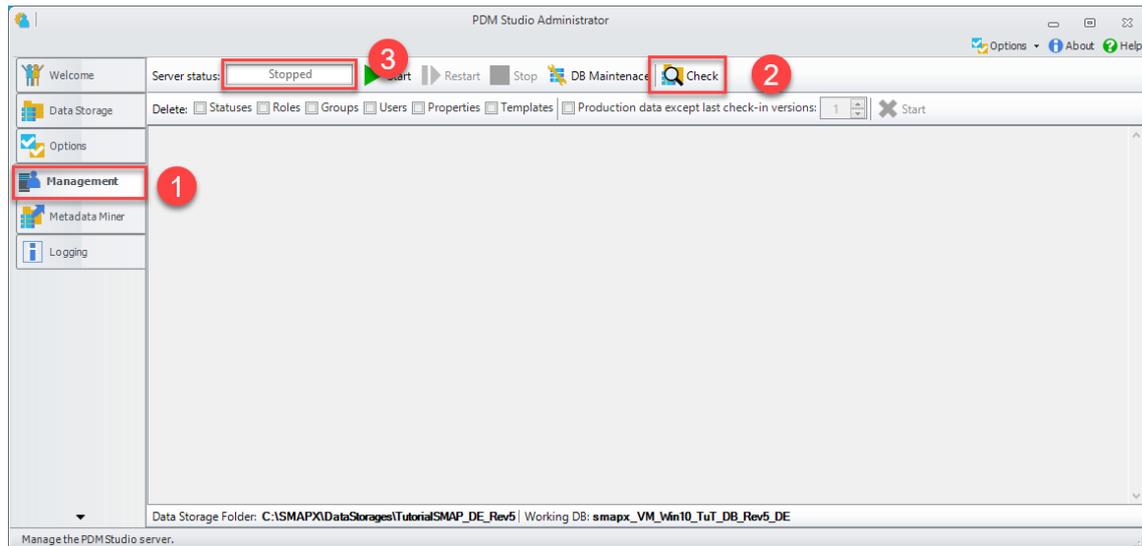
The new function has been integrated into the "**Check**" command **(2)** in the "**Management**" tab **(1)**. To use the "**Check**" function, the PDM Server must be in the "**Stopped**" state **(3)**.

After you run the "**Check**" function, the "**Check data storage integrity**" dialog box gives you the option to enable the new feature when checking the data storage.
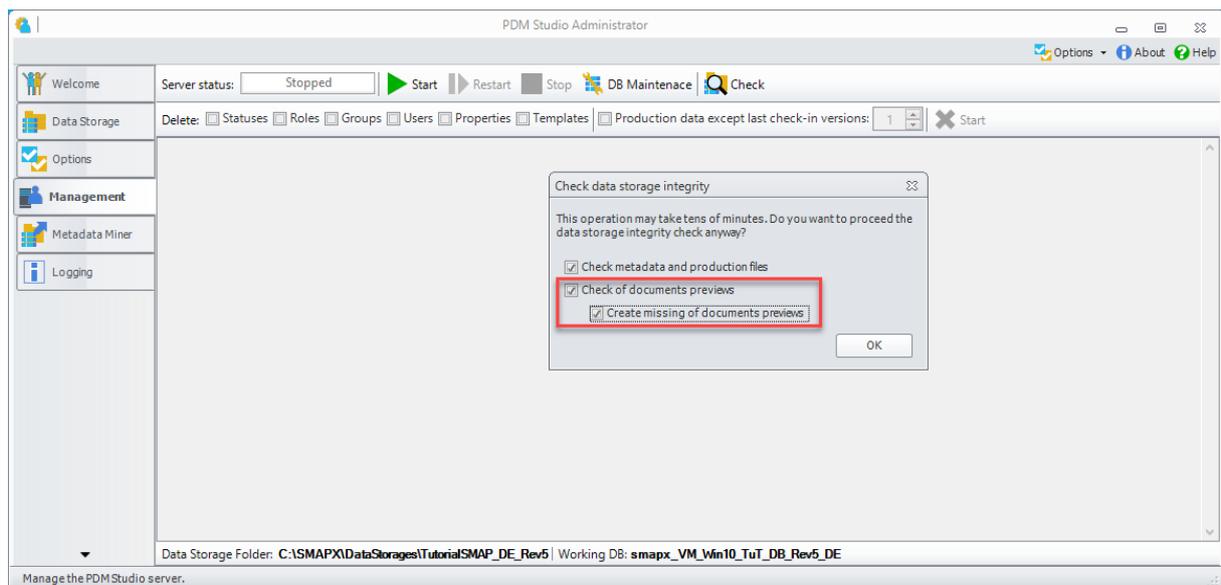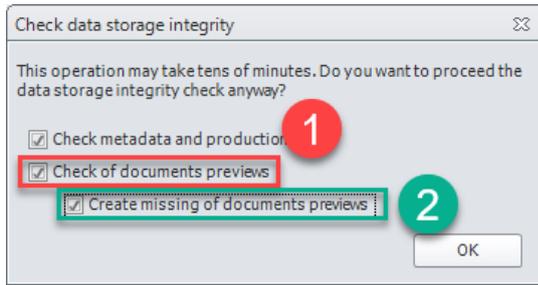
The new "Check of documents previews" option (1) checks the data storage for missing previews.

The sub option "Create missing of documents previews" (2) corrects missing thumbnails.
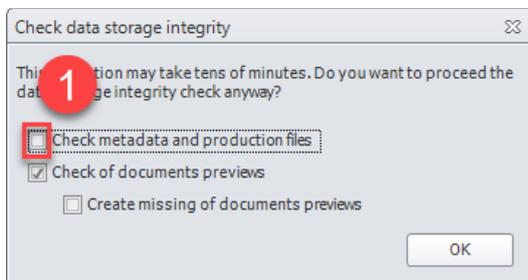
Important: If you ONLY want to "Check of documents previews" and/or correct the previews by selecting the "Create missing of documents previews" sub option, please uncheck the "Check metadata and production data" option (1).

Click "**OK**" to start the scan.
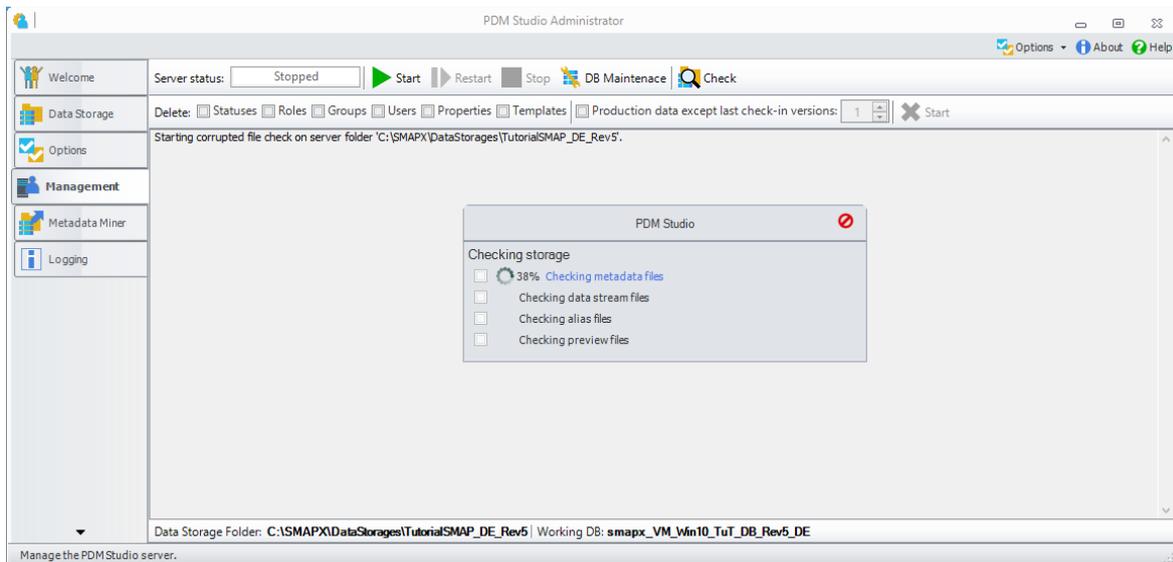
Important: Checking the integrity of the data store and/or correcting the previews can take some time (up to several hours), depending on the size of the data store.

Since the PDM Server is in a "Stopped" state, it is not possible to work with PDM Studio. Therefore, the check should only be performed when time permits.

PDM Studio Client Administrator

Plausibility Check Decider plugin with possibility selection of more standard parts folders.

The new setting "**Import document type deciders by more paths**" **(1)** has been added to the PDM Studio Client Administrator in the "**Settings > PDM Studio general plugins**" section.
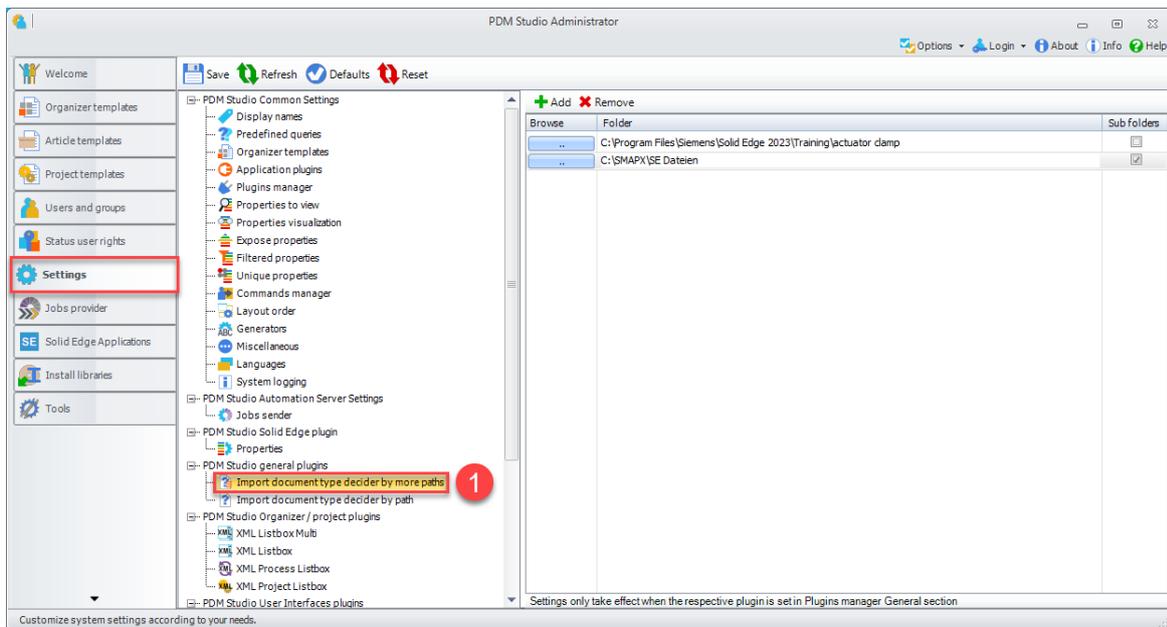
This can be used to determine whether the **document type** in the specified folders is automatically detected during the plausibility check and then imported either as a **user document** or as a **standard part**.
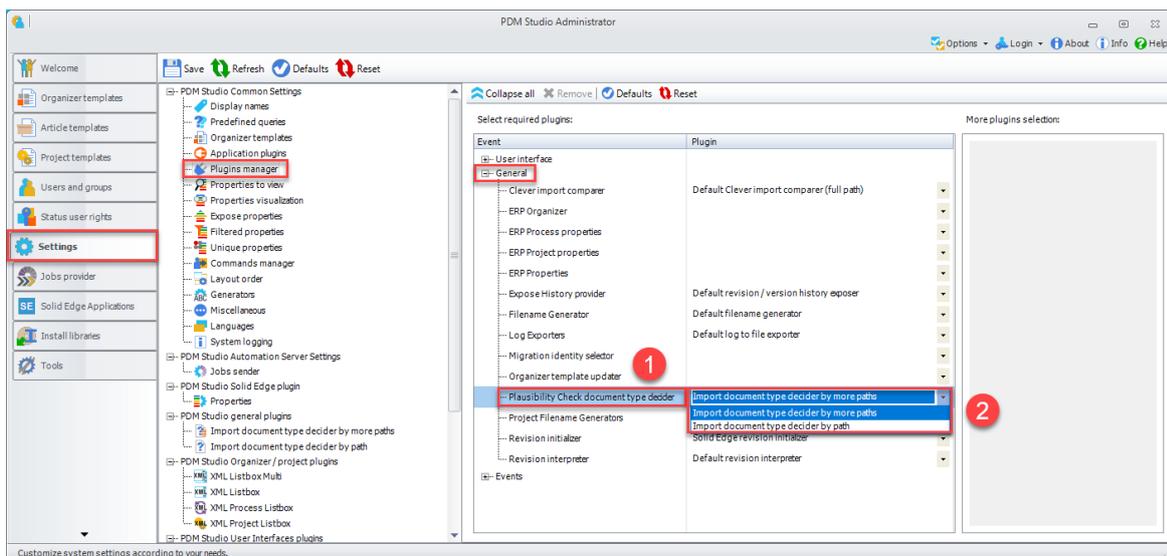
To activate the new feature, you have to change the general plugin "**Plausibility check document type decider**" **(1)** in "**Settings > Plugin Manager > General**" to the plugin "**Import document type decider by more paths**" **(2)** in the Plugins Manager of the Client Administrator and save it.
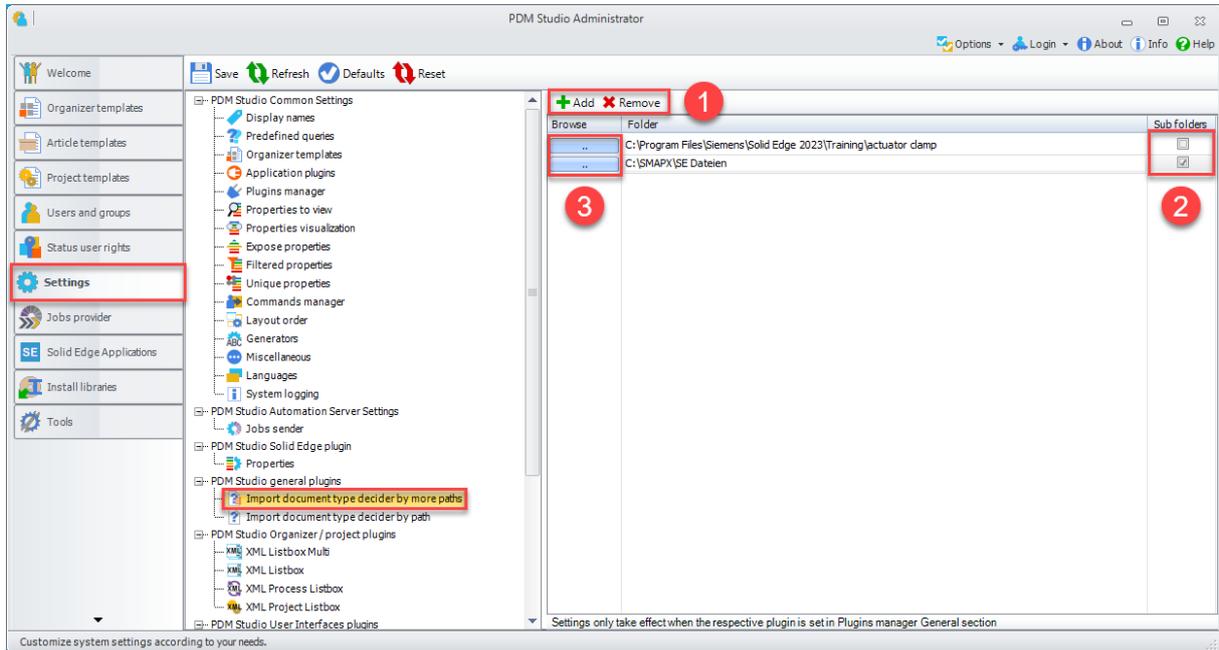
Use "**Add**" **(1)** to select the standard parts folder. If the folder is not specified, all unmanaged documents are imported as user documents.

(**Optional**) **(2)** Select **the Sub folders** (Include) check box to also import parts located in subfolders as standard parts. By clicking the "**Browse**" button(s) **(3)** you can change the folder path(s) at any time.

Use the "**Remove**" button **(1)** to remove the folder entry from the list.
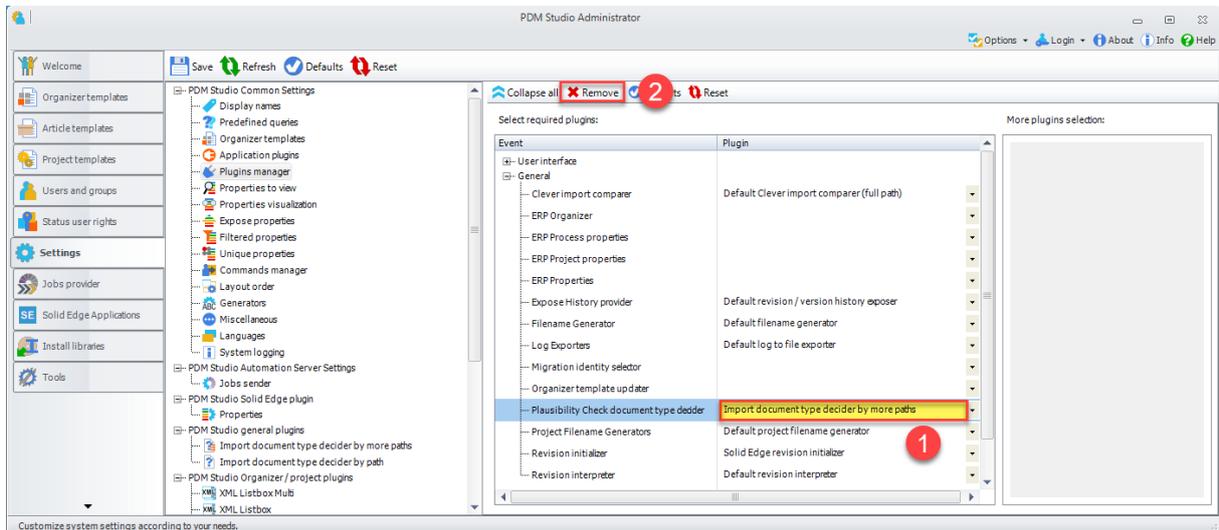
If you want to remove the plugin (empty entry), **select the plugin (1)** and choose the "**Remove**" function **(2)**. The plugin will be removed and the entry will be empty.

PDM Studio

New possibility to remove category from visual navigation tree
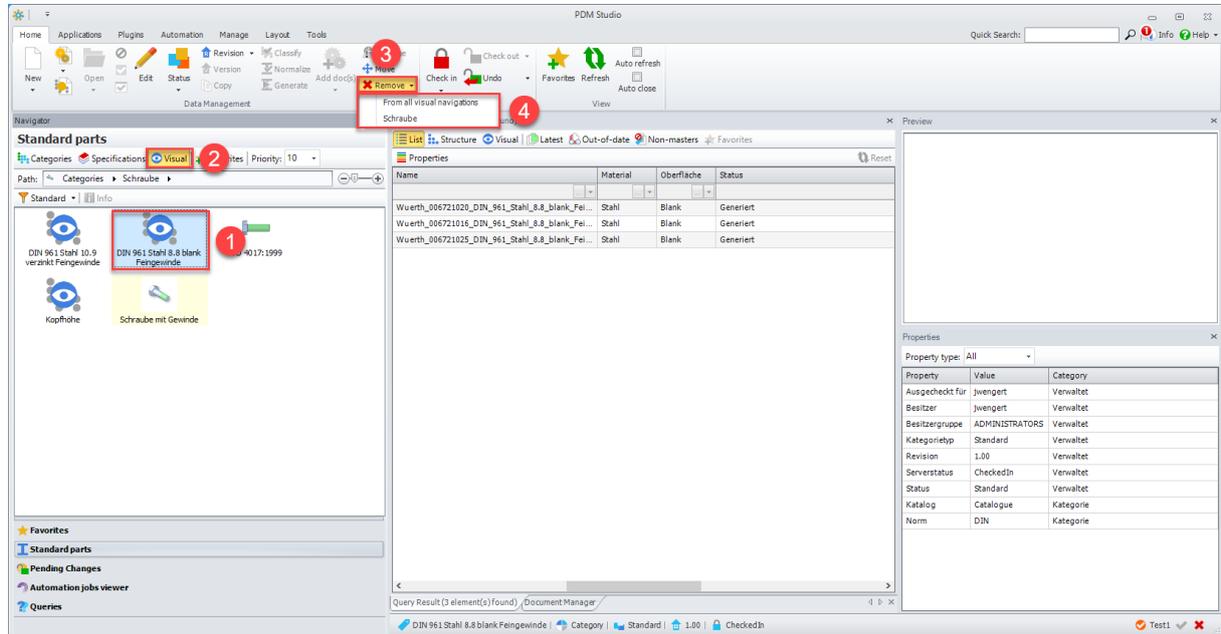
As of MP03, it is possible to delete an **end category (1)** from the **visual display (2)** using the "**Remove**" function **(3)**.

When the "**Remove**" function **(3)** is applied to an **end category**, it does not matter whether the entry "**From all visual navigations**" **(4)** or, as in our example, the entry "**Schraube**" **(4)** is selected. Both have the same result; the **visual navigation of the end node (1)** is deleted.

Important: Only the visual representations of end categories can be deleted.

Logging

With the MP03, the **API Service** (**PDMStudioAPIService.exe.sxlog**) and **PDM Server** (**PDMServer.sxlog**) logging has been moved from the Windows event log to the "**C:\ProgramData\CAD_Partner_GmbH\PDM 2023**" **(2)** folder, and the **Automation Server** (**AutomationServer.exe.sxlog**) logging has been moved to the "**C:\ProgramData\CAD_Partner_GmbH\Automation Server**" **(1)** folder of the operating system.
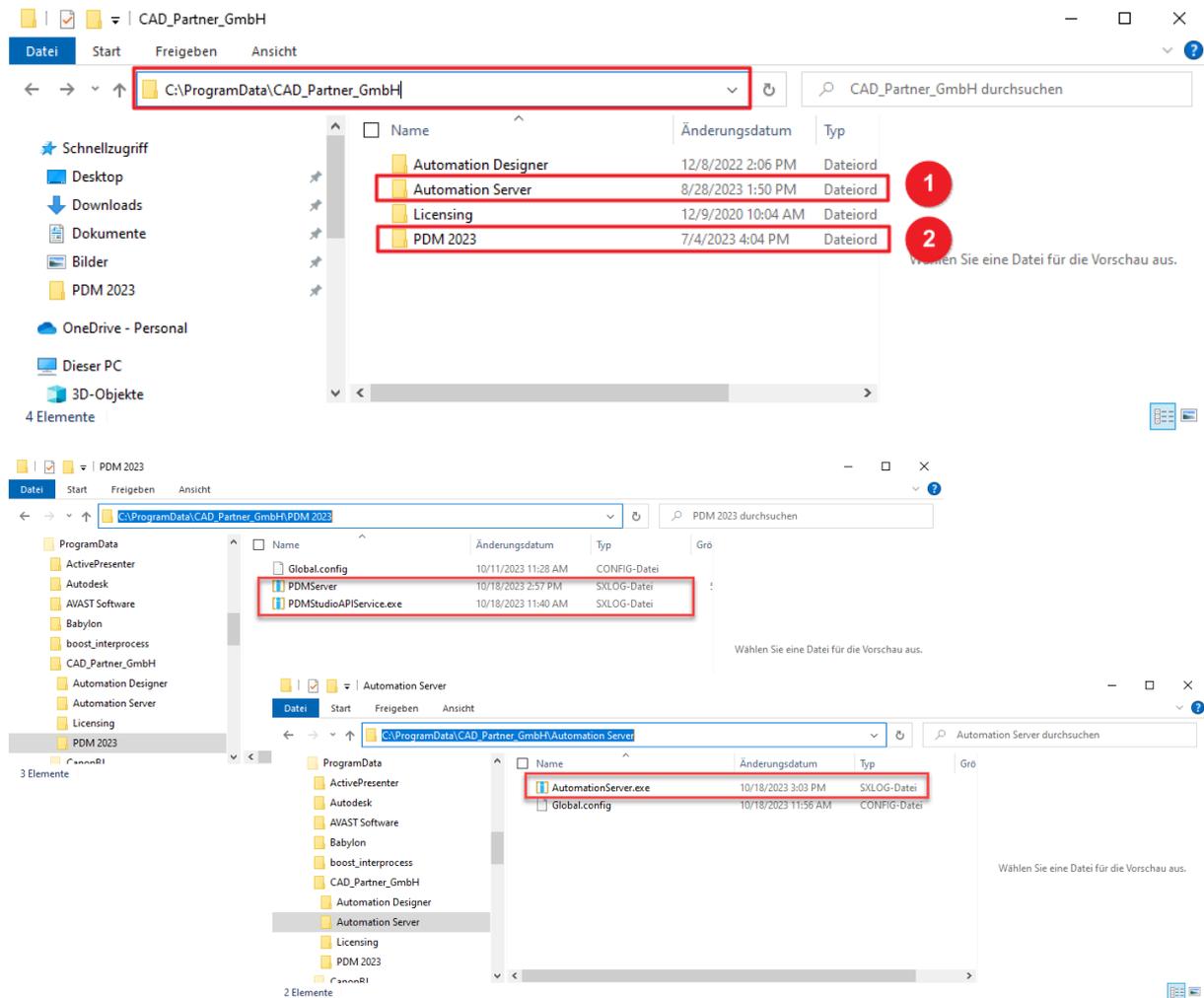
Other (Technotes)

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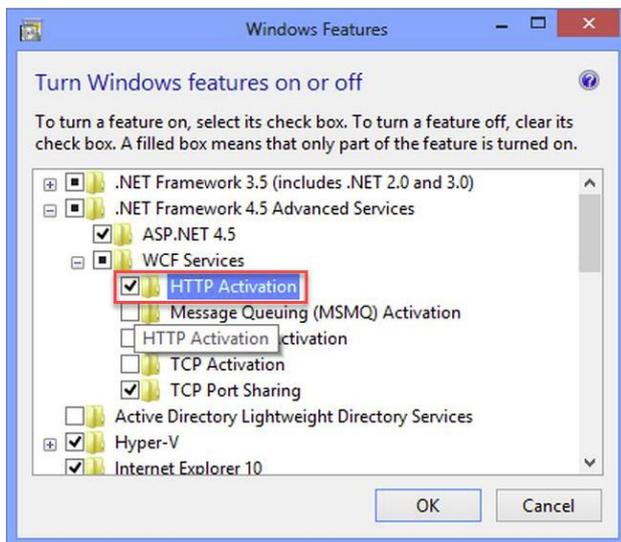
If the **Microsoft .NET Framework 4.8** is installed, go to the **Windows Features** in Windows Settings, and open the "**Turn Windows features on or off**" settings.

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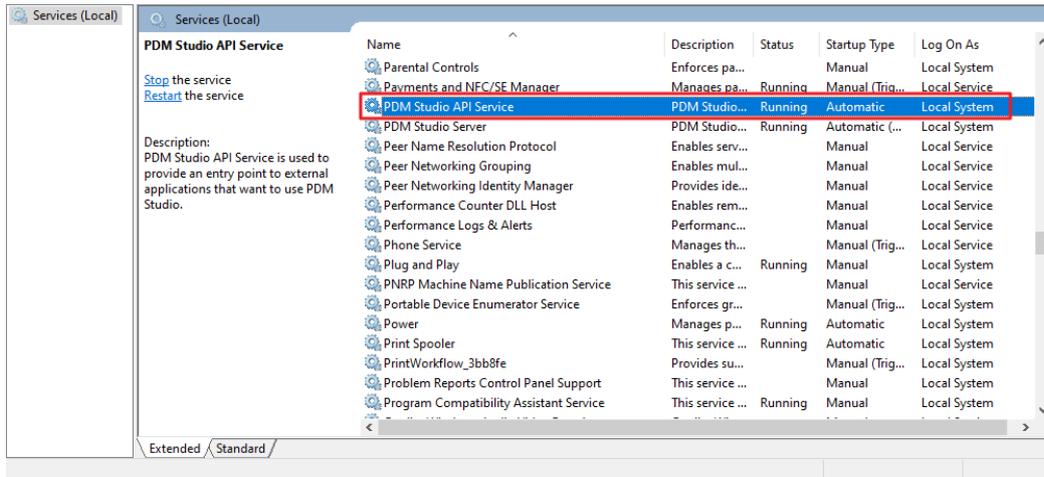
The responsible source process is the "**PDM Studio API Service**" service.
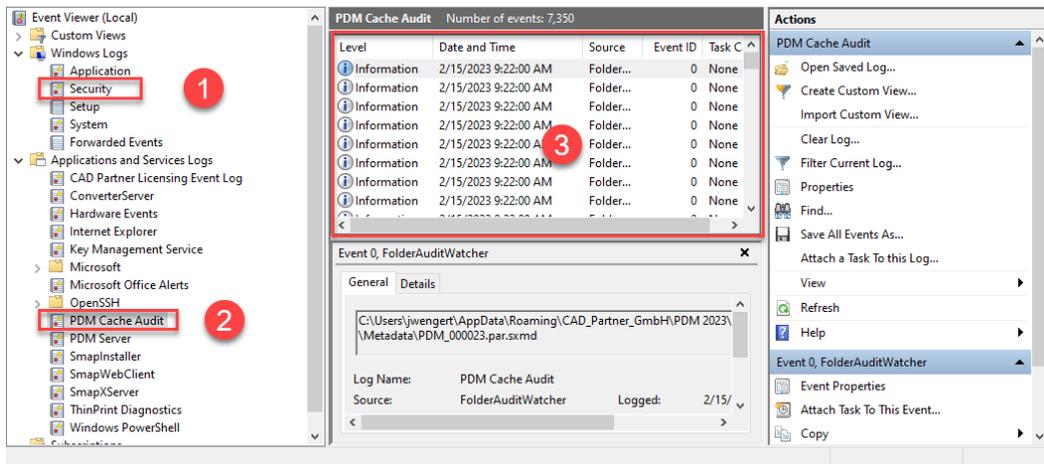
The most important point is that the PDM Studio API service **MUST** have access to the "**Security**" event log **(1)**.

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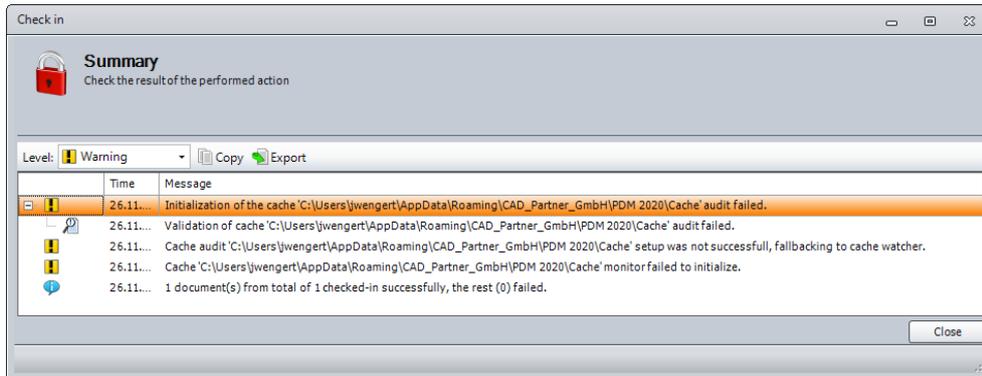
Important: This is because the company's security policy cannot be changed directly from the workstation, but is controlled globally by IT.

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"
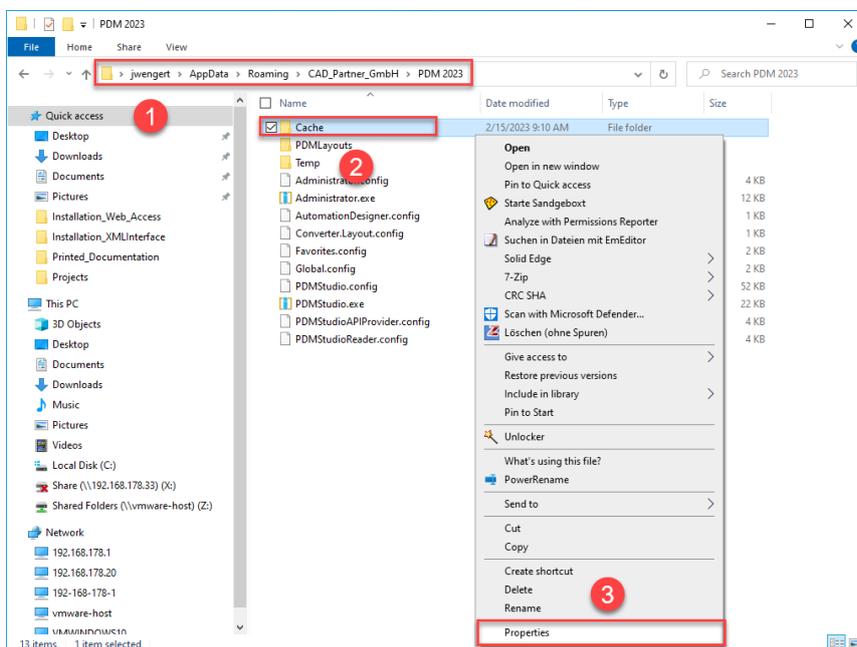
Right-click on the "**Cache**" folder **(2)** and select the "**Properties**" **(3)**.
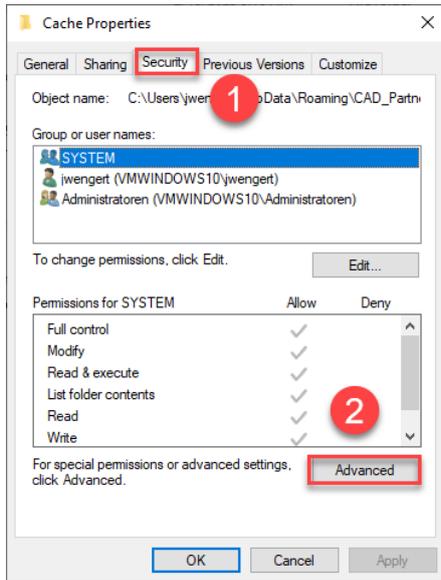
In the properties of the "**Cache**" directory, switch to the "**Security**" tab **(1)** and then click to the "**Advanced**" **(2)** button.
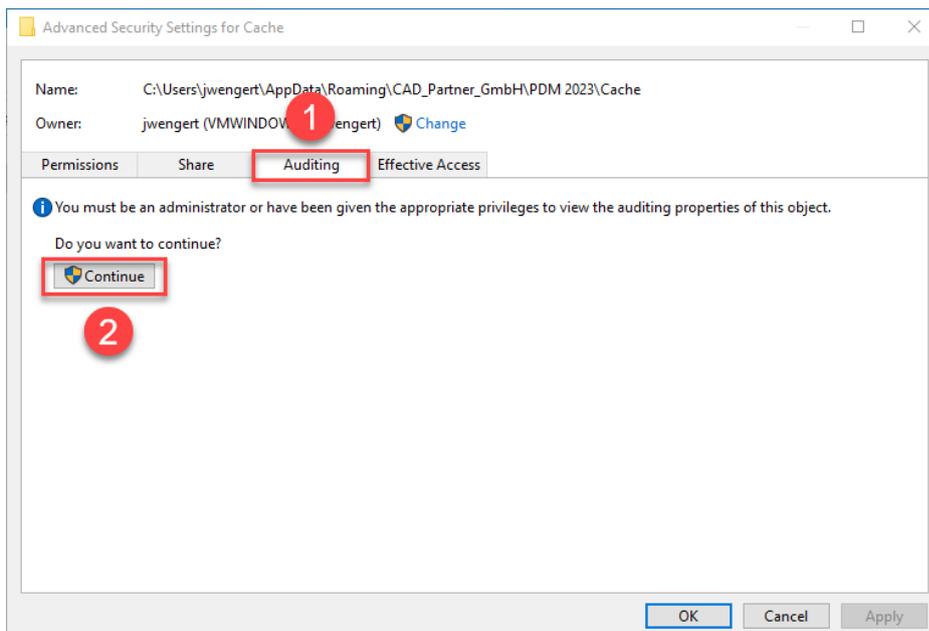
In the "**Advanced security settings**" of the cache directory, select the "**Auditing**" tab **(1)** and then click **Continue (2)**.
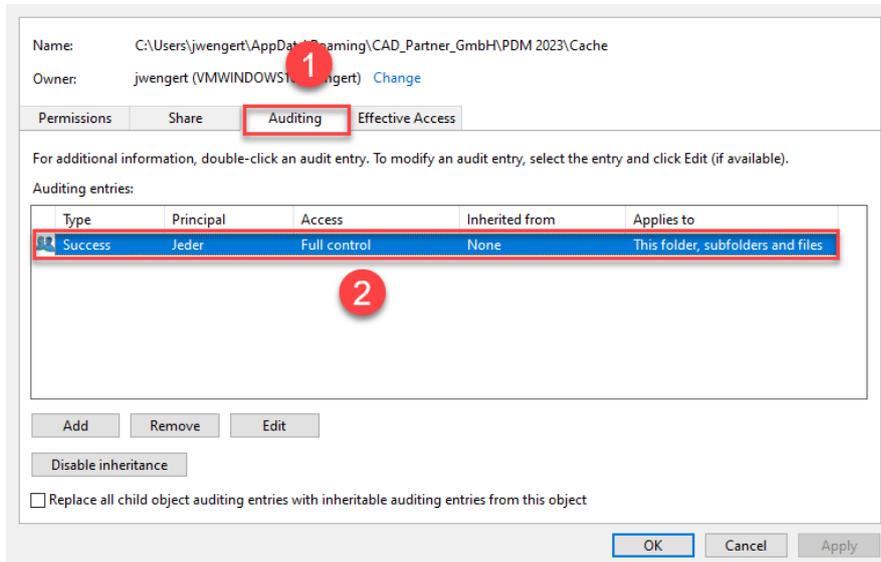
Go to the '"**Auditing" tab (1)**. In order to be able to monitor successful access to the cache folder and all its subfolders and files, "**Full control" (2)** over this folder and all its subfolders and files **MUST** be configured for everyone without any restrictions. If this is the case, then everything is fine here.

In the next step, start "**Run**" with the Windows key combination "**WIN+R**" as an administrator.
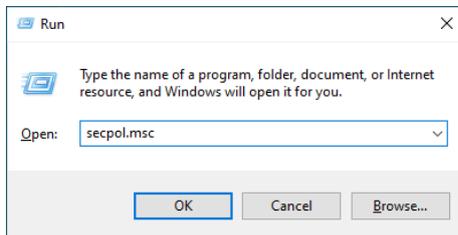
Then enter the command "**secpol.msc**". The **Local Security Policy** will be started.

Important: Please note that you need "Administrator Privileges" for this function.
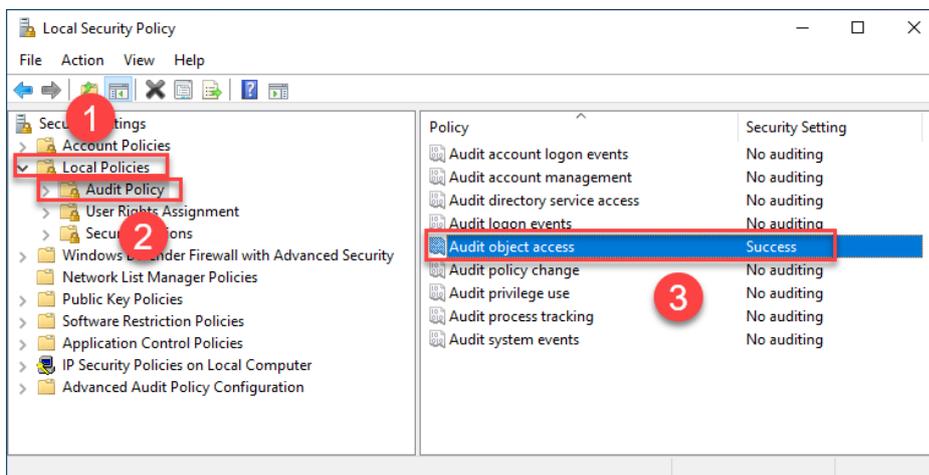
Go to the "**Local Policies**" **(1)** and navigate to the "**Audit Policies**" **(2)**. Open the "**Audit object access**" option **(3) by double-clicking** on it.
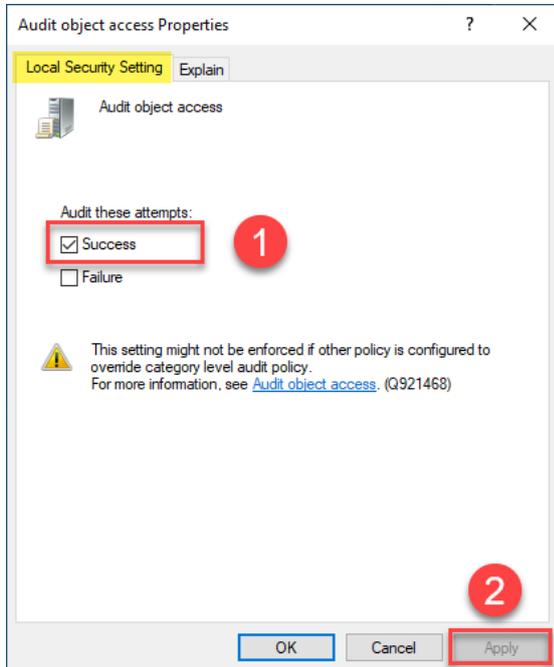
The "**Audit object access Properties**" will be opened. The "**Success**" **(1)** option must be checked here.

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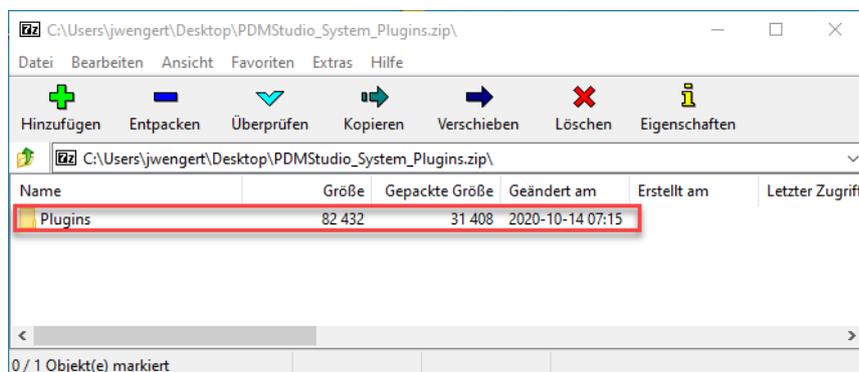
The zip file contains the **Plugins folder**.
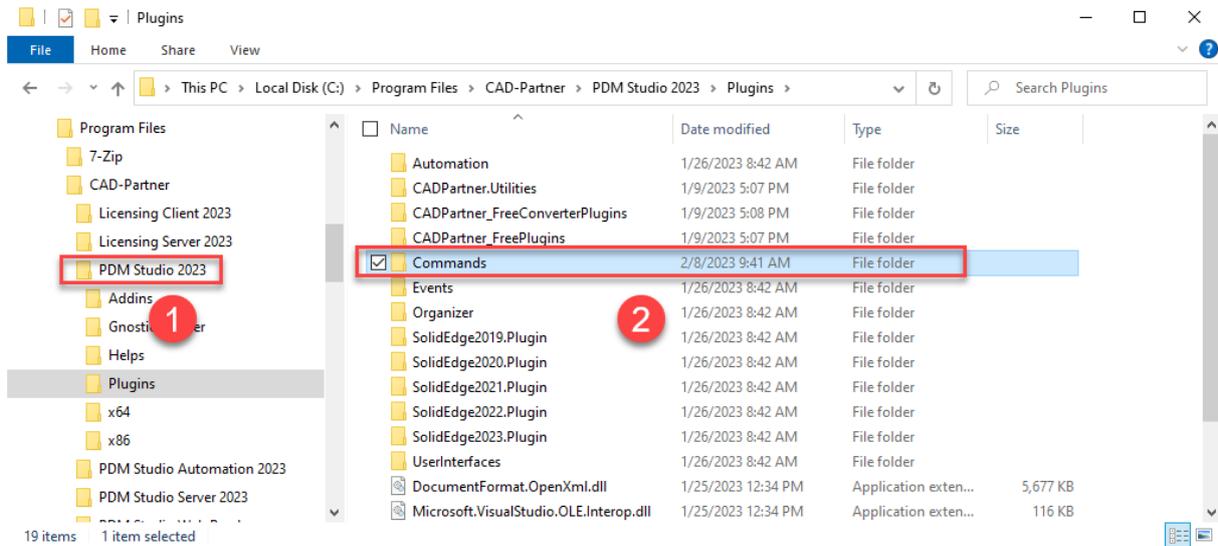
Copy the entire "**Plugins**" (do not change into the folder) folder to the main directory of your PDM Studio client installation - usually "**C:\Program Files\CAD-Partner\PDM Studio 2023**" **(1)**.

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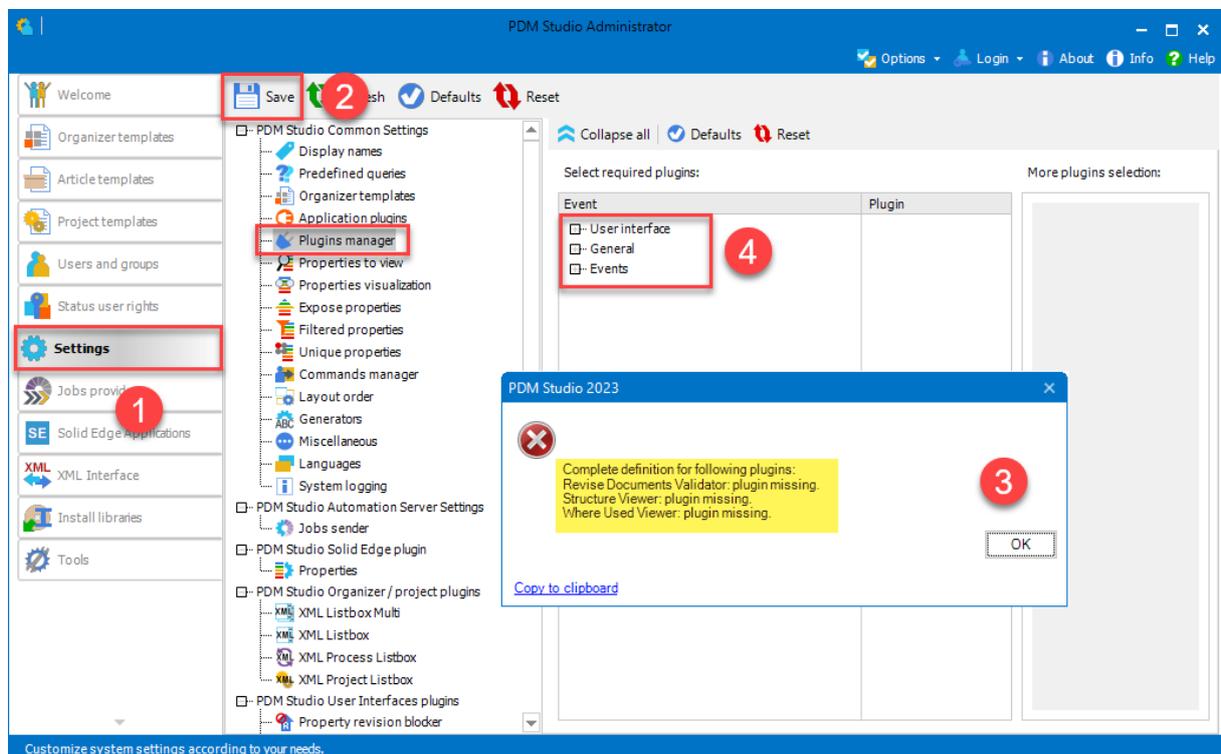
There may be some messages (3) (you will be directed to the location (Plugin Manager) (4) of the missing Plugins) about missing Plugins. These messages prevent you from saving the settings.

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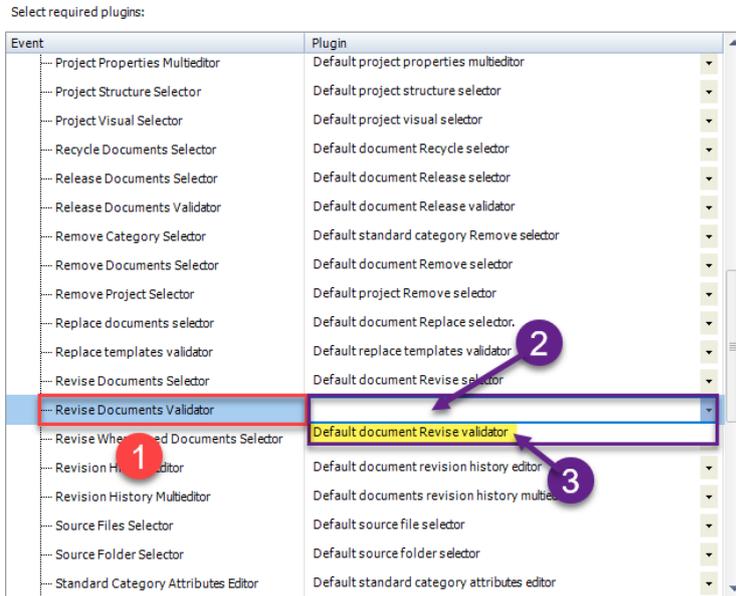
Fix these missing settings (indicated by **empty entries** in the respective "**Plugin**" **column (2)** of the corresponding "**Event**" **(1)**) and **assign the Plugin (3)** from the **pull-down menu** to the **missing events** and click "**Save**" again.

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).
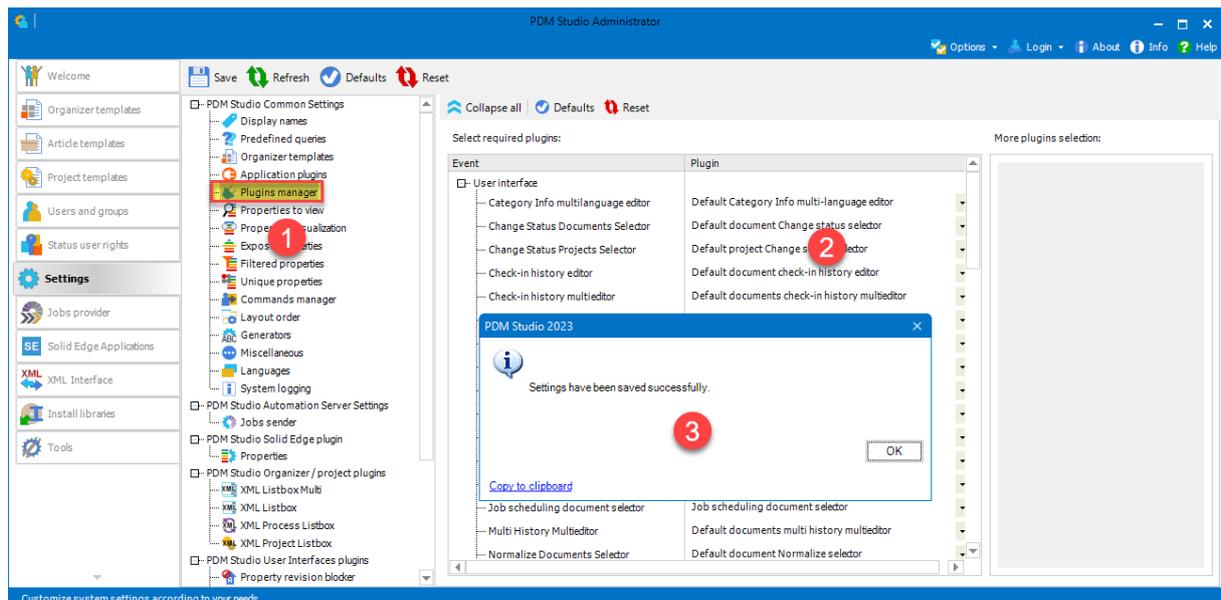
Other enhancements/improvements/changes/fixed bugs

Enhancements:

Module	Description
NX integration	Added support for Family of Parts.
Migration	Introduced the new option "Migrate standards as foreigns at conflict". It migrates problematic standard parts in transfer phase as foreign parts without necessity start whole migration again.
PDM Studio	Fixed displaying out-of-date status (red font) of standard parts when higher revision is removed.
PDM Studio	Completed full support of standard categories in Query Result panel.
PDM Studio	Enabled Open and Edit commands for mixed selection of user documents and standard parts.
Solid Edge integration	Added Solid Edge 2024 support
XML Interface	XML Interface is now a GUI application instead of a console application.
XML Interface	Introduced the new DownloadDocument command.

Improvements:

Module	Description
Automation Server	Improved / optimized / reworked way how automation server queue files are handled.
Client Administrator	Improved XML Listbox dialogue font for better readability.
Client Administrator	Improved logging for uploading Organizer template files. Especially when an issue occurs.
General	Introduced an additional check for mandatory plugins to be set to client application start.
Part Keeper	Improved logging empty mandatory fields when Part Keeper application is closing.
PDM Studio	Revising master documents are prioritized before revising their non-masters. If revision process of master document fails creating a new revision of non-master document is cancelled.
PDM Studio	Improved stability of MS Office supported documents view.
PDM Studio	Unified multiple documents check-in/out commands naming. 'Structure' means typically 3D models documents and 'Relations' commands include documentation e.g. via system links.
PDM Studio	Improved logging for inaccessible projects, articles, categories, folders and documents in Navigator Favorite panel.
PDM Studio	Improved managing and logging of failed documents in Import folders structure wizard.
PDM Studio Reader	Improved logging during starting and initializing PDM Studio Reader.
PDM Studio Server	Reduced connection timeout to the SQL server upon PDM Studio Server startup. New timeout is 30 seconds. If it fails, the startup process will be terminated.

Server Administrator	Improved possibility how to change a password for connecting to MS SQL engine. It is possible defining a new password during the first connecting now.
Server Administrator	Improved timeout that is currently set dynamically dependent by the number of database records in database restore process.
Server Administrator	Improved performance of searching in Metadata Miner tool .
XML Interface	XML Interface can process a higher number of incoming messages. That mainly useable for importing large assemblies structures.

Changes:

Module	Description
Licensing	Updated the latest version (MP) of PDM Studio licensing.
PDM Studio	Unmanaged standard and foreign parts cant be imported from the local file cache.
PDM Studio Reader	Disabled Open command not-generated standard parts.
Solid Edge integration	Solid Edge license should not be leased before standard parts are really used (open, place and replace commands).

Repaired Bugs:

Module	Description
Automation plugins	Fixed getting selected project information to the Quantity Information Writer plugin.
Automation plugins	Hidden redundant Refresh option for Solid Edge / SOLIDWORKS selectors Automation plugins.
Automation plugins	Fixed importing a document as system link when its parent is standard / foreign part in Import Automation plugin.
Automation Server	Fixed logging inside of Automation Server for processed running jobs.
Client Administrator	Fixed validation when Display Name is set for exposing without defined a name.
Client Administrator	Fixed missing icons and 'subfolders' option layout for Plausibility Check Decider plugin
Client Administrator	Fixed displaying icons of visualized properties in Client Administrator Settings.
General	Fixed editing hidden / partly hidden grid's cells when wrong text was filled (different letters order). Just edited hidden cell is currently auto-scrolled gets visible.
General	Fixed migration of the application settings when a PDM Studio version is skipped. From example migration from PDM Studio 2017 to PDM Studio 2023.
General	Fixed detecting of the column changes in the grids for right displaying empty columns by option 'Show all empty predefined columns'.

General	Fixed reading non-existent shared client settings that are not fired an exception and are ignored in Client Administrator for defining right settings.
General	Fixed links for Inventor, NX and P&ID to right help chapters.
Migration	Fixed displaying custom working statuses of migration options in right section.
Migration	Fixed an exception when migration resolving revision chain by Smap3D 9.6. 'ParentDoc' property with specific invalid data.
NX integration	Fixed the extension of JT configuration file (*.config) in Save As Automation plugin.
NX integration	Fixed generating content of *.sxapp file where component filenames are written instead of full paths.
NX integration	Fixed NX documents icon in Navigator Favorite panel.
Part Keeper	Fixed checking-in/out documents when Part Keeper application is closed before fully loading editing data.
Part Keeper	Fixed an exception in managed mode of Part Keeper when the active language is trying to be removed. Also fixed enabling / disabling Add and Remove language buttons.
Part Organizer	Fixed possibility to set a folder editor like user interface plugin.
Part Organizer	Fixed saving just editing data via listbox in Organizer editor when save command is started.
Part Organizer	Fixed an exception during editing of not generated standard parts in Part Organizer.
PDM Studio	Fixed revising documents when there are different revisions from one revision document chain in one instance of Revise document wizard. Typically in different assemblies structures.
PDM Studio	Fixed displaying whole structures of projects, articles and documents in Query result panel from selection in Navigator Favorites.
PDM Studio	Fixed working with just created new standard category without PDM Studio restarting. Fixed adding standard parts to such category or editing category itself.
PDM Studio	Fixed throwing checked-in events in Check-in wizard for categories. When category is checked-in no checked-in document event is fired.
PDM Studio	Fixed revising of standard category that contains at least two characteristics and to have set some default values for those.
PDM Studio	Fixed missing Properties to View button in the first step of Replace document wizard.
PDM Studio	Fixed enabling Automation jobs provided by PDM Studio ribbon bar when Automation Server is switched to other one.
PDM Studio	Fixed generating not generated standard parts after revision of their standard part category when option "Move standard parts to a new category revision" is activated.
PDM Studio	Fixed displaying content of view panels (view, preview, properties ...) for categories selected in Navigator.

PDM Studio	Fixed the Revise standard category wizard when 'Move standard parts option' is activated and a new characteristic is added to standard category.
PDM Studio	Fixed original new characteristics validation in revise / new standard category wizard, fixed multieditor read only flag for managed properties set
PDM Studio	Fixed possibility editing all editable properties in multi-editor independent on their names. Properties with name matches to property set name were read only.
PDM Studio	Fixed validation of new created characteristics' uniqueness names in New / Revise standard category wizard .
PDM Studio	Fixed displaying context menu for articles in Navigator Favorites panel.
PDM Studio	Fixed displaying drawings in project structures for Query Result panel
PDM Studio	Fixed selection of documents in cycle via non-structure links when a wizard is started with 'Empty selection' option.
PDM Studio	Fixed matching paths defined by mapped network drives in Clever import step of import wizards.
PDM Studio	Fixed mass validation of unique properties in multi-editors only when 'As warning' and also 'For release' options are activated together.
PDM Studio	Fixed enabling documents in Open last document revision/released document wizard - only valid documents are now selectable.
PDM Studio	Fixed disabling parent documents for selected part in Revise where used wizard. Documents are currently disabled separately not all at once.
PDM Studio	Fixed an exception in release and revise validator in Release and Revise document wizards due to unloading documents structure.
PDM Studio	Fixed displaying content of view panels (view, preview, properties …) for Automation jobs selected in Navigator.
PDM Studio	Fixed starting a context menu for project folders.
PDM Studio Server	Fixed setting last revision flag after removing non-master document that blocks creating a new non-master document version.
PDM Studio Server	Fixed the location of a document preview in data storage during finishing Replace Document Template wizard when templates of different types are replaced. It touches typically data storage folders created per maximum count of documents.
PDM Studio Web Reader	Fixed processing queries for no projects / articles.
SE/SWX integration	Fixed correctly refreshing PDM Studio after copy document process started via API from applications ribbon bars.
Server Administrator	Fixed uncompleted warning text about necessity restarting PDM Studio Server when PDM Studio Server options are saving.
SOLIDWORKS integration	Fixed modify command of variable checked-in standard parts for SOLIDWORKS application.
SOLIDWORKS integration	Fixed loading SOLIDWORKS assembly links when they have been changed by Plausibility Check import during check-in-out command.
XML Interface	Fixed an exception when a PDM Studio wizard is cancelled in special situation.

XML Interface	Fixed creating / downloading drawings and presentations files for managing closed documents.

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