PDM Studio

What’s new 2023 |EN| MP 06

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Introduction

PDM Studio 2023 MP06 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 "**ReadmePDM2023MP06.txt**" in the "**Documents\EN**" directory of your MP06 installation files. This document lists the ticket numbers of the solved tickets in MP06.*

For more information on how to install the V2023 MP06, 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 MP06.

Installation

Important: We strongly recommend that you check in all documents and clear the local cache on all clients before installing PDM Studio V2023 MP06.

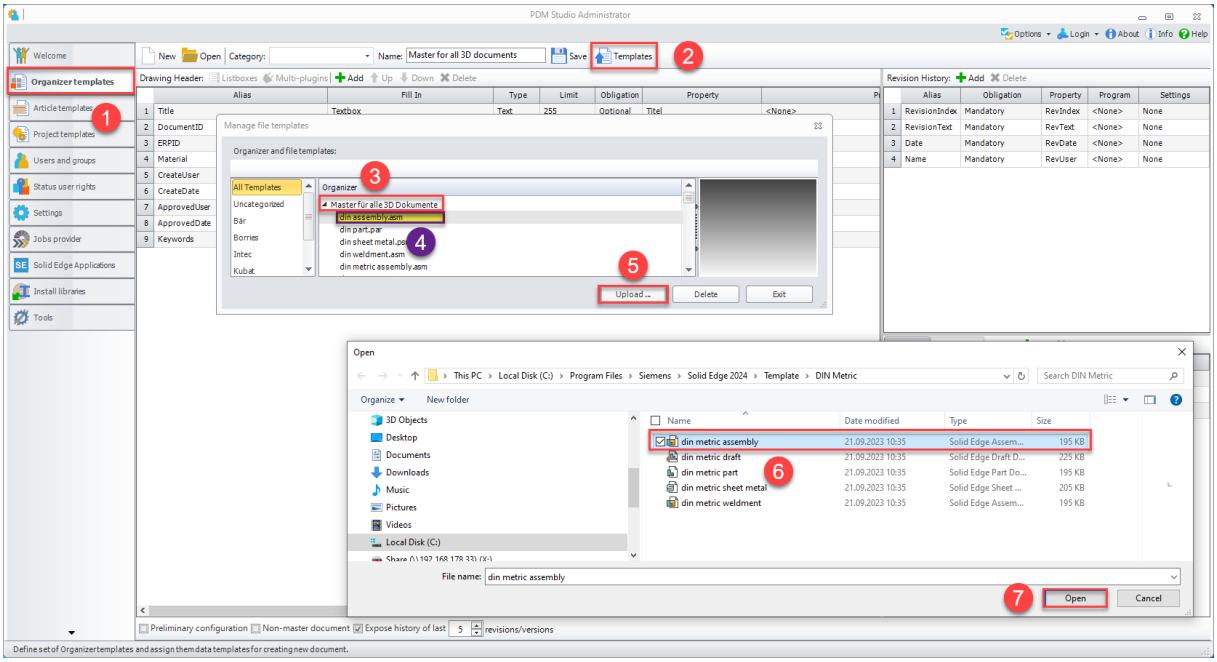
Important: All client applications such as PDM Studio, Solid Edge and the Automation Server MUST also be closed. It is highly recommended, that you back up your data storage before any update.

PDM Studio Client Administrator

Replacing Organizer file templates

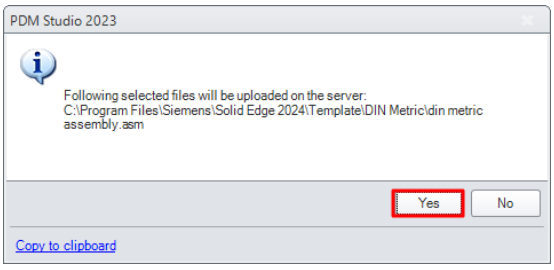
Previously, if you tried to upload the same file template (for the same Organizer template) twice, you would receive the following message "**Following errors occur at file uploading: The file XXX has not been uploaded. Upload failed. Please see the log for details.** ".

With MP06, the option to "**Replace**" the existing template by the user has been implemented (e.g. in case the user has updated the template file).

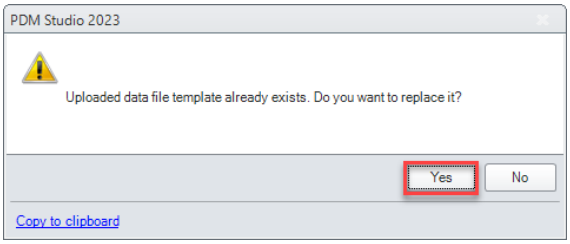


The procedure for replacing a file template is the same as the procedure for adding a new file template.

In the Client Administrator, go to the "**Organizer Templates**" tab **(1)** and click on the "**Templates**" **function (2)**. In the "**Manage file templates**" window that appears, select the "**Organizer template**" **(3)** in which the **file template of the same name (4)** is to be **overwritten**. Use the "**Upload**" **function (5)** to find the file with the **same name (6)** and "**Open**" it **(7)**.



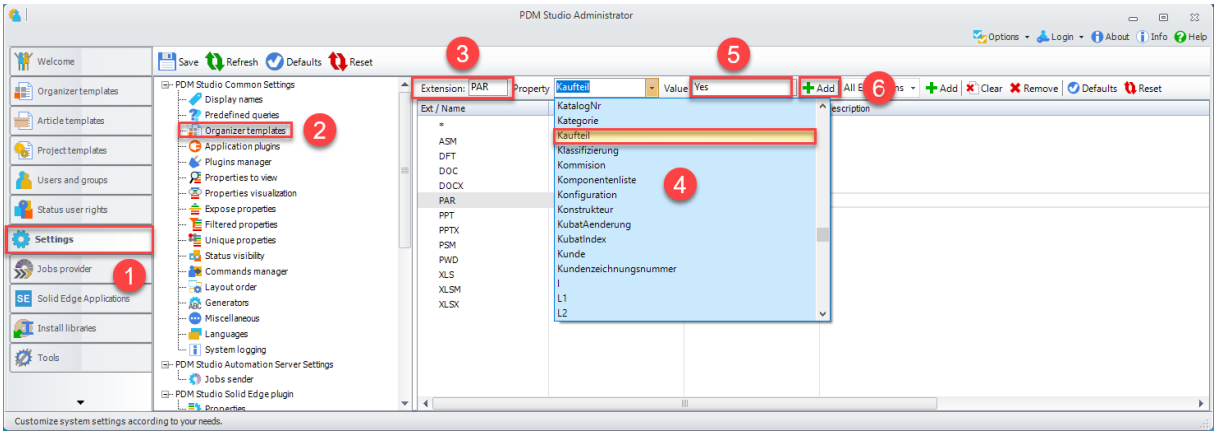
The next step asks if you want to upload the selected template to the server. Click "**Yes**" to continue. "**No**" cancels the operation.



From MP06, it is displayed now, that the selected template already exists in the organizer template and you are asked if you want to replace it. "**Yes**" replaces the template, "**No**" cancels the operation.

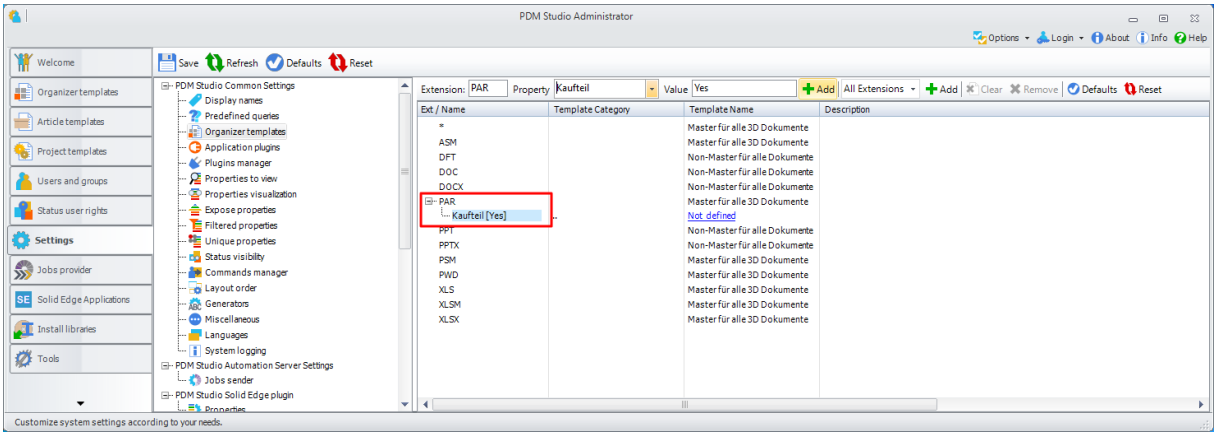
Improved display of selected properties for organizer template rule definitions

Improved display of selected properties for rule definitions of organiser templates in use.



General: The "**Organizer templates**" **settings (2)** relate to the import of user documents. This is where you can define the "**Organizer templates**" to be used for the import of user documents.

As an additional feature, you can also define different "**Organizer templates**" **(3)** for specific documents to be imported; these are **identified by the defined property (4)** and its **value (5)**. Once you have made your selection, click on the "**Add**" **button (6)**. This will add the property and its value to the extension.

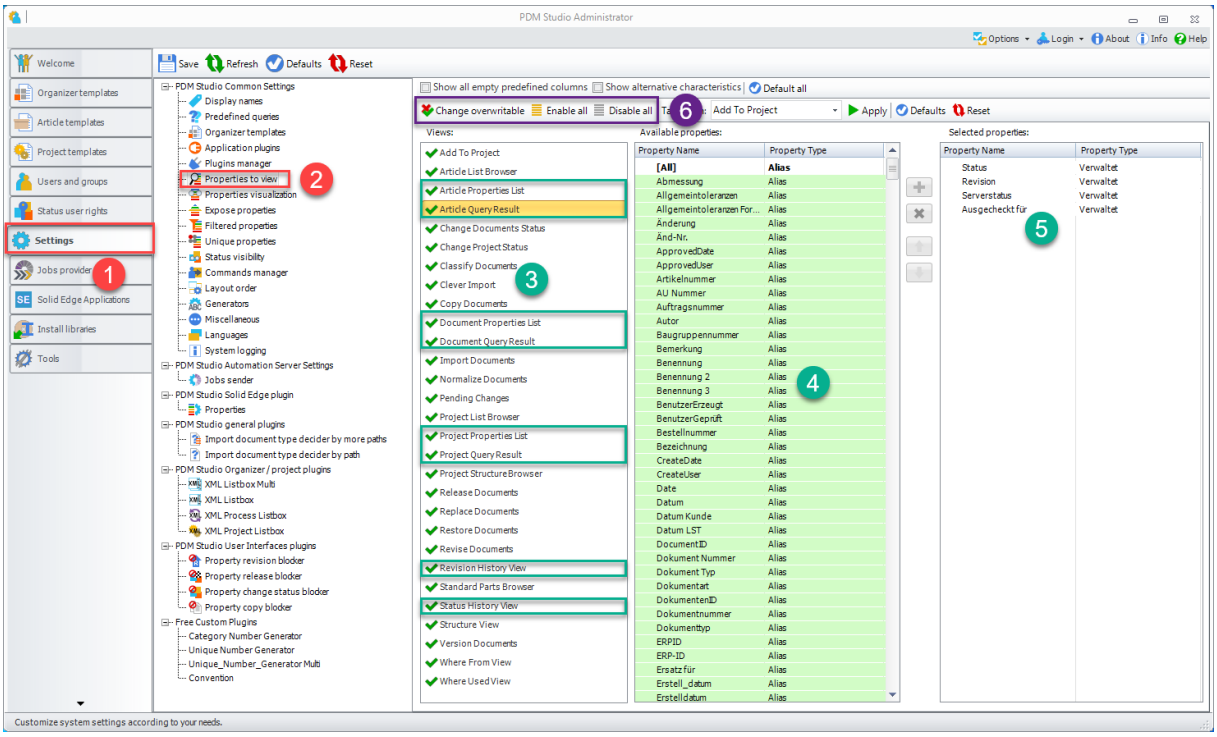


Once the property has been added, it will be displayed in the color of the corresponding property group for easy identification (in our case, "Blue" for the Custom property).

Enhancement of the display of additional properties in other dialogs and views

Previously, it was not possible to display additional properties in various PDM Studio windows.

With MP 06 it is now possible to pre-define additional properties to be displayed by default in the Client Administrator. This has been done by adding additional "**Views**" **(3)** to the "**Properties to view**" **(2)**.



The windows marked "Green" **(3)** have been redesigned in MP06 to allow additional properties to be inserted into PDM Studio if required.

The default display in PDM Studio for these additional property sets in the **new exposed windows (3) can be defined (4,5)** in the Client Administrator in the "**Settings**" **(1)** in the option "**Properties to view**" **(2)** for the **respective window (3)**.

For example, the query results windows for documents, projects and articles have been separated internally (these are now also listed individually here as "**Article Query Result**", "**Document Query Result**" and "**Project Query Result**"), so that it is now possible to display the desired **set of properties (4)** for the query results in these windows independently of each other as "**Selected properties**" **(5)**.

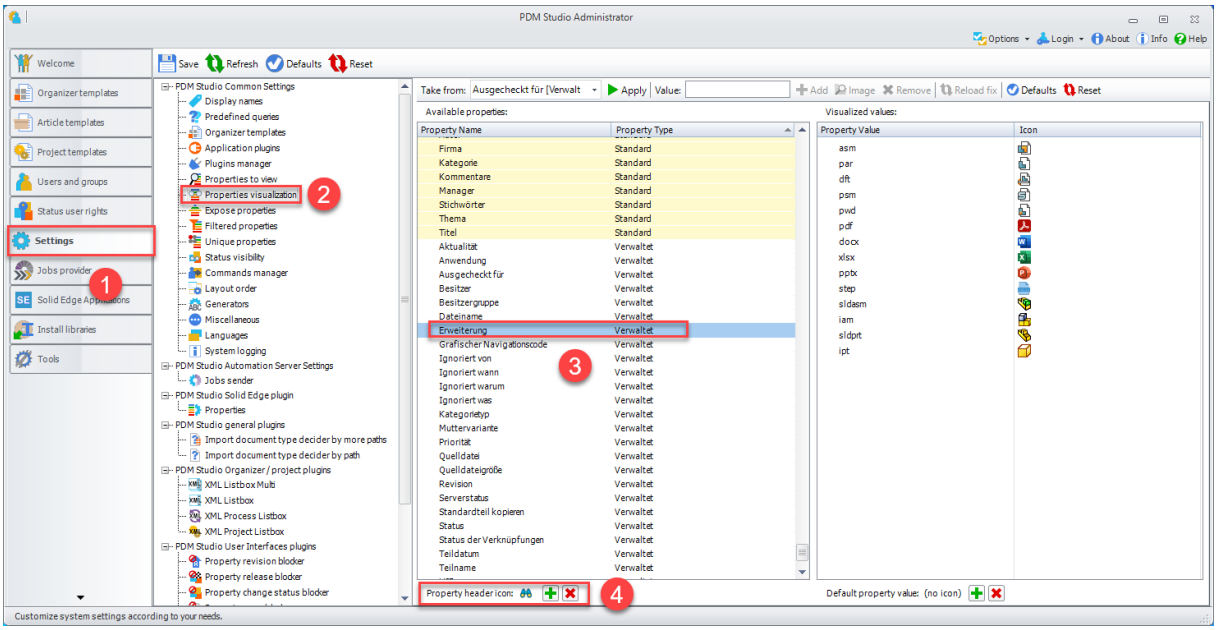
If you want to display additional properties in the windows in PDM Studio, you can now do this for almost all windows in PDM Studio.

***Note**: It is only possible to customise the properties in PDM Studio if this has been "Enabled" in the Client Administrator (6).*

See the Properties function in the "Revision History View" and "Status History View" in the PDM Studio chapter for more information.

Use of icons instead of the names of the properties in the header line

As of MP06, it is now possible to use icons instead of header text in PDM Studio.



To replace the text of a header property with an icon, select the "**Properties visualisation**" **(2)** setting in the "**Settings**" **(1)**.

In the next step, select the "Property Name" **(3)** whose header text you want to replace with an icon from the list of available properties.

In our example this is the "**Extension**" property (3).

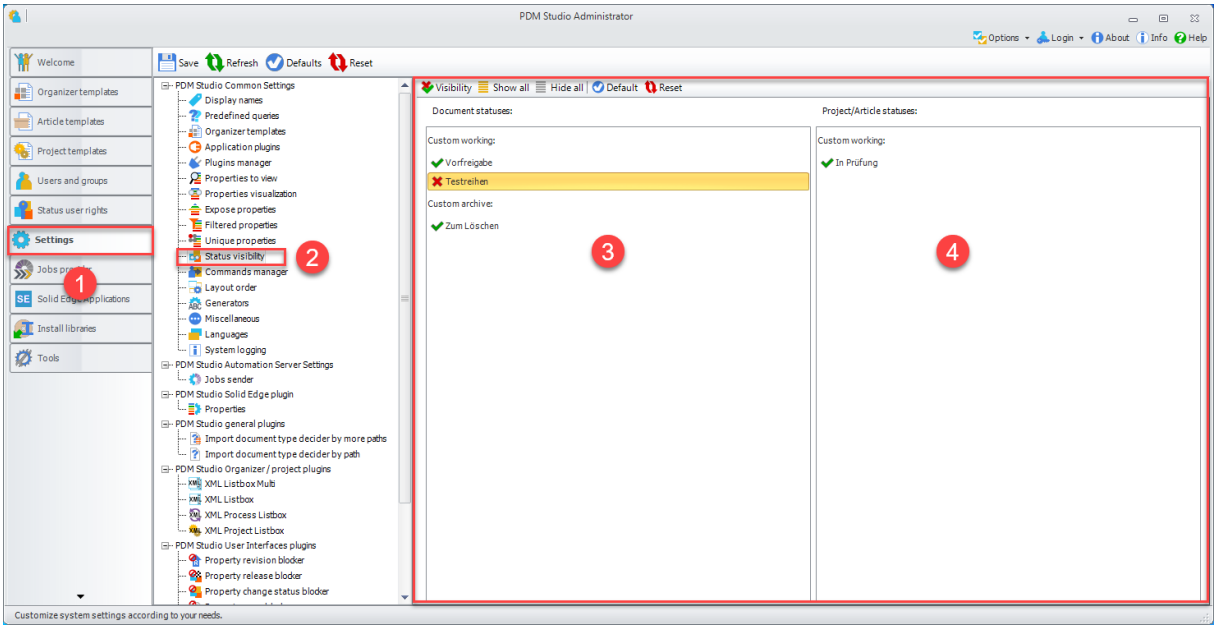
Use the "**Add**" ✚ **function (4)** to browse for the icon on your hard drive and add it. Use the "**Delete**" ✖ **function (4)** to delete the associated icon from the "**Property Name**" **(3)**.

__Note__: An icon must have the file extension ".ico". Only icon files with a size of __16x16 pixels__ can be used.*

For more information, see the Icons in the headers of the PDM Studio chapter.

Status visibility

The visibility of custom states in the list of available states in PDM Studio can now be configured from MP06. This gives the administrator the option of hiding a custom status from PDM Studio altogether.



The custom statuses are listed in the "**Settings**" **(1)** in the "**Status visibility**" **section (2)**, which is divided into two parts, **Document Status (3)** and **Project/Article Status (4)**.

Each section contains all the custom statuses created (working and archive statuses). Select a status and then perform the required action:

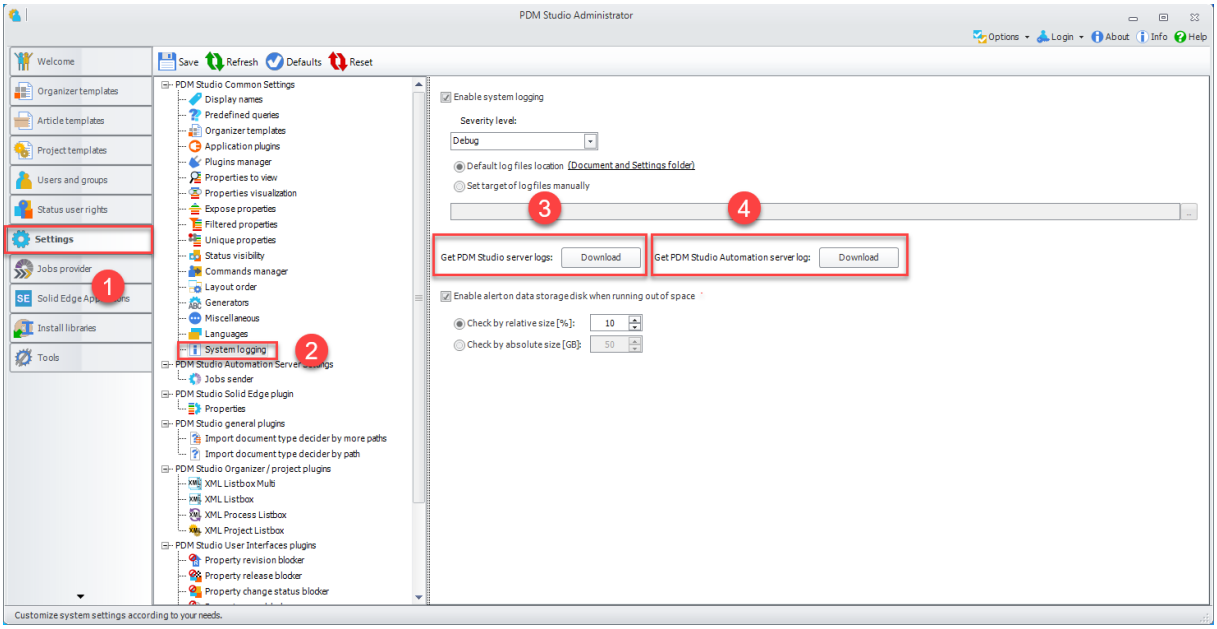
- Select **Visibility** to set the selected status to "**show**" or "**hide**". The default setting is "**show**".
- Select **Show all** or **Hide all** to set all the custom statuses to "**show**" or "**hide**" at once.

For more information, refer to the Status visibility section in the PDM Studio chapter.

Retrieve PDM Studio server log and PDM Studio Automation server log.

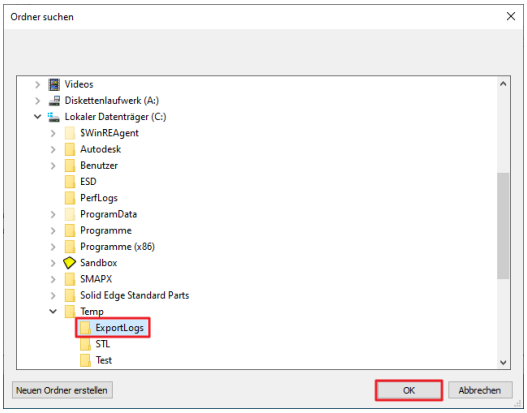
The background to this new functionality is that in many companies (e.g. where access to the PDM Server and/or Automation log is required for support purposes), most users do not have access to the PDM Server and/or Automation server to retrieve the required log files.

There are many reasons for this. In larger companies, the user must first contact the IT department, in smaller companies there are external IT service providers, etc. The process can be complicated and time consuming.

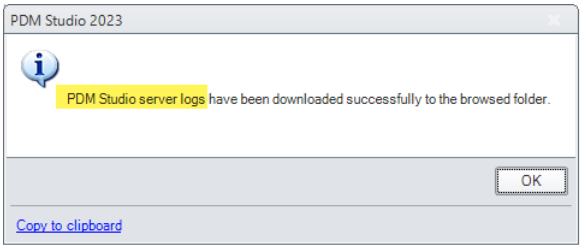


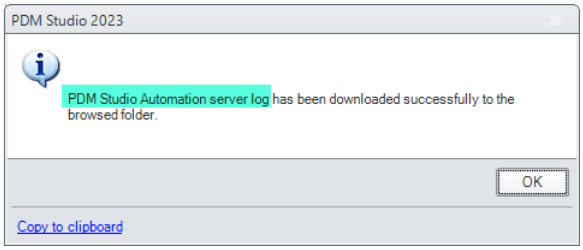
Since MP06, the functions "**Get PDM Studio server logs**" **(3)** and "**Get PDM Studio Automation server log**" **(4)** have been implemented in the Client Administrator's "**Settings**" **(1)**, "**System loggin**" **(2)** to make the logs available to normal users.

Click on "**Download**" behind the **respective options (3,4)** to download the logs.

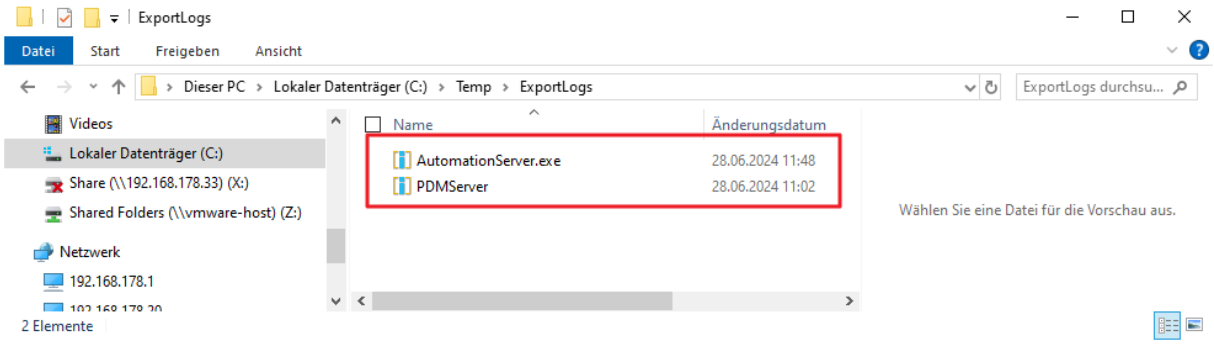


In the next step, create a new "**Empty**" directory or select an "**existing Empty**" directory. Confirm with "**OK**".





A message is displayed indicating that the log(s) in the selected folder have been successfully downloaded.



The PDM Studio Server log file "**PDMServer.sxlog**" and/or the Automation Server log file "**AutomationServer.sxlog**" can be viewed using the "**LogReader.exe**" application from the PDM Studio V2023 installation directory. In the event of an error, they must be sent to PDM Studio Support for troubleshooting.

Automation Server

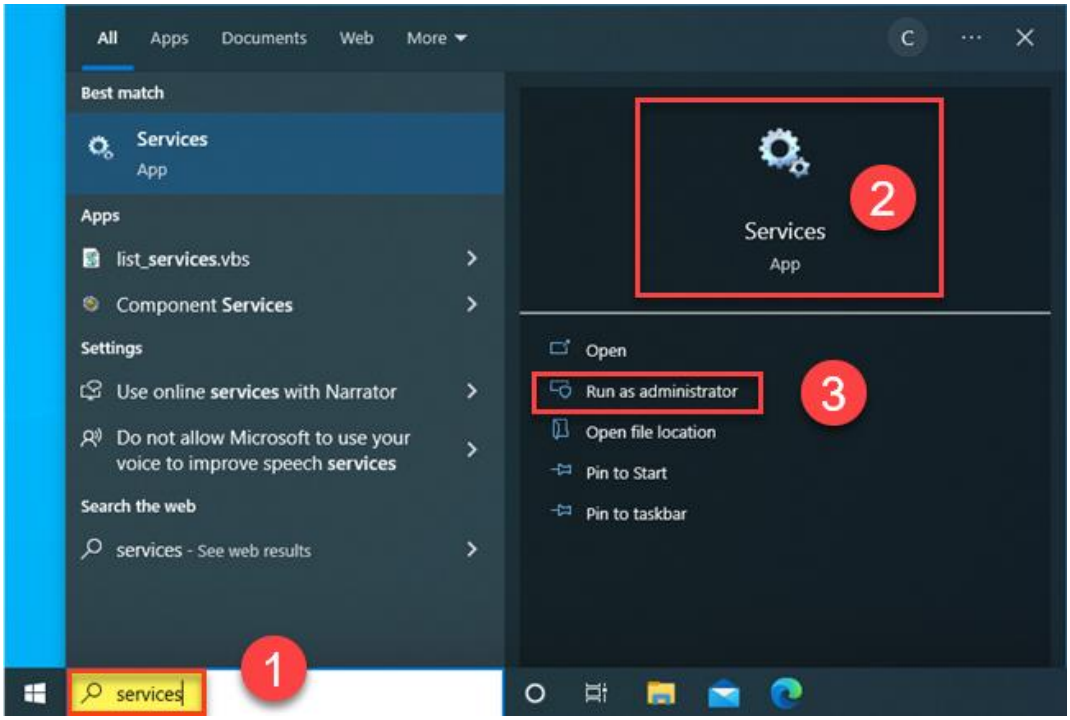
Automation Server as a Service

From MP06, it is now possible to **start the Automation Server in a logged-off state**, in addition to the previously required logged-on state.

For this purpose, a **new Windows service** called "**PDMStudioAutomationService**" has been added during the installation of the Automation Server from MP06 onwards, which allows the Automation Server to be started when Windows is logged off under certain conditions (see Restrictions at the end of the chapter).

Important: The PDM Studio Automation Server service runs under the Windows system account so that it can continue working even when logged off. More details at the end of the chapter.

*Note: The new "**PDMStudioAutomationService**" service is set to "**Startup type = Manual**" after installing the MP06 of the PDM Studio V2023 Automation Server.*

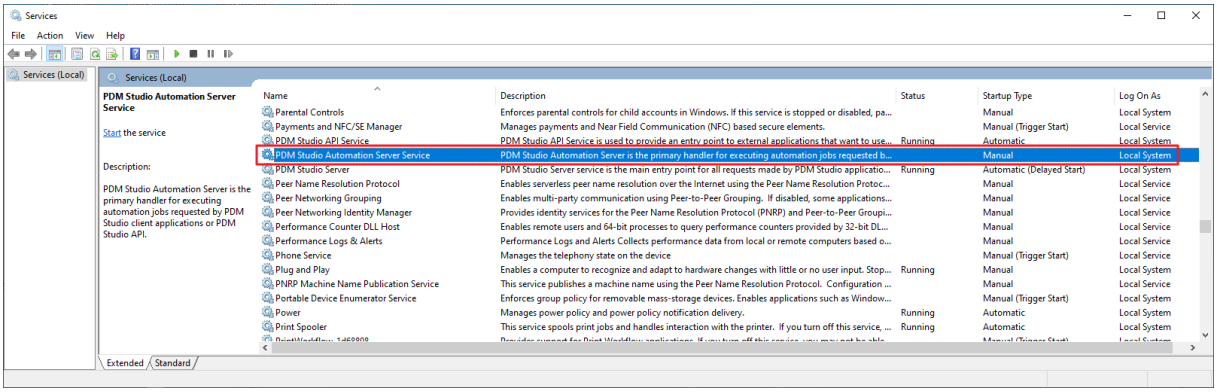


To start the new "**PDMStudioAutomationService**" service, or to specify the startup type after a Windows start/restart, type "**Services**" **(1)** in the Windows search box.

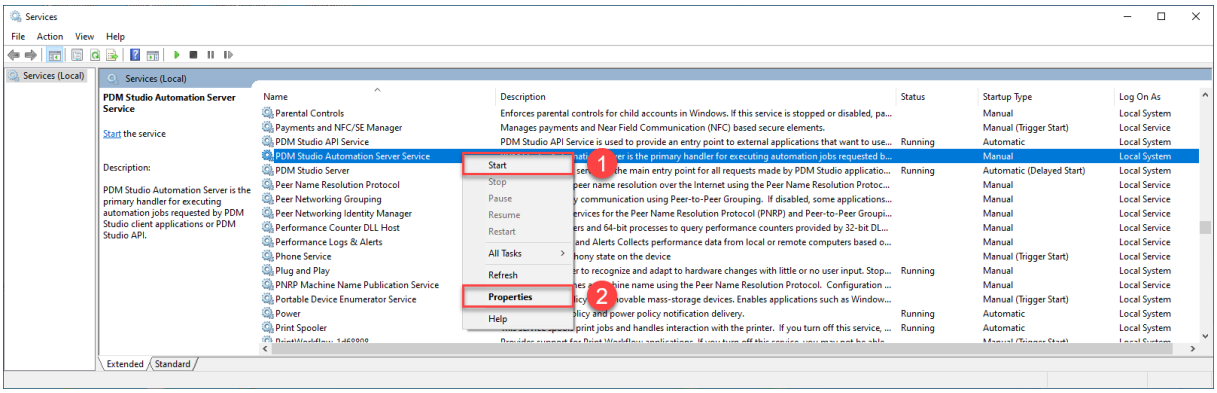
Windows will offer you the "**Services**" **utility (2)**. If you do not have the necessary rights, you will have to start the utility with the option "**Run as administrator**" **(3)**.

Open the Windows Utility (2) or (3).

The Windows services are displayed.



Scroll down to the "**PDM Studio Automation Server Service**" service name. To start or configure the service, select the "**PDM Studio Automation Server Service" entry and right-click**.

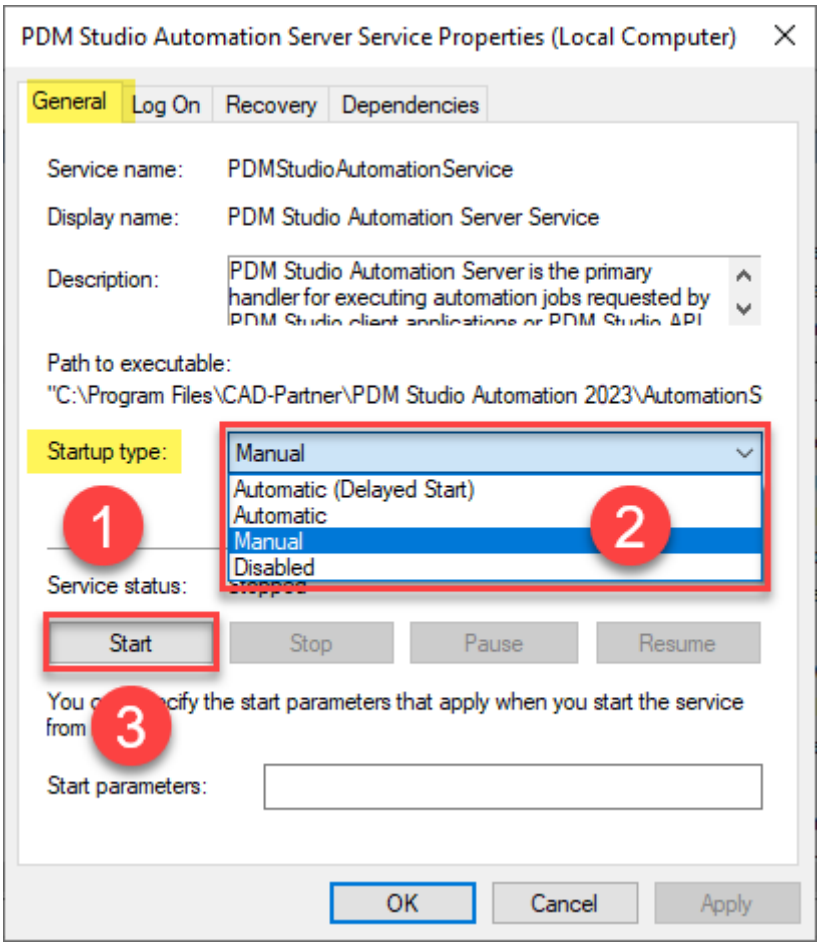


In the context menu that now appears, you can **start the service immediately** using the "**Start**" function **(1)** or configure the service using the "**Properties**" **function (2)**.

Select "**Properties**" **(2)** from the context menu to configure the service.

Configuring the service

The "**PDM Studio Automation Server Service Properties**" are now displayed.



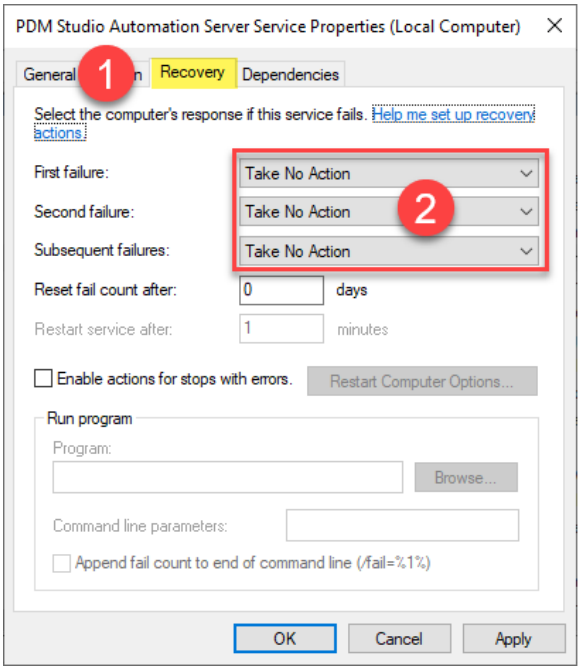
The "**General**" tab contains the **settings (2)** for the "**Startup type**" **(1)**.

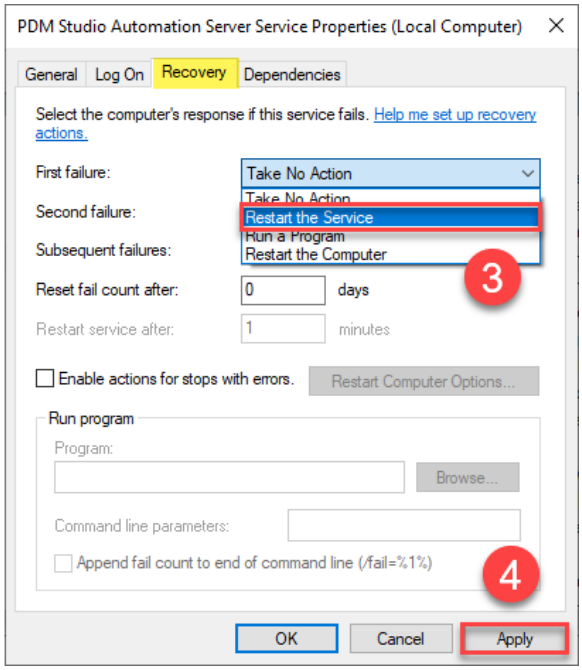
***Note**: Windows divides its services into four different startup types: Automatic, Automatic (delayed start), Manual and Disabled.*

A service set to Automatic is started automatically by the operating system when your computer starts, while services set to Automatic (delayed start) are started after the system starts.

If you want the service to start when the computer starts, you must set the start type to Automatic. If the service does not start correctly (or sometimes does not start correctly) when the computer starts, select the "**Automatic (delayed start)**" setting.

The "**Start**" **function (3) will start the service immediately**.



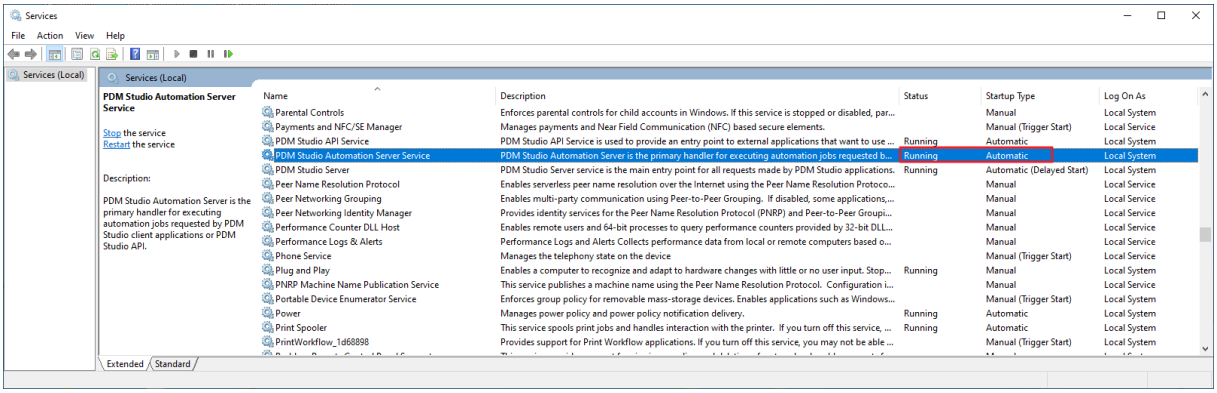


Further startup options can be found under the "**Recovery" tab (1)** in the "**Error Handling" (2)** section. This allows you to specify what to do if the service fails to start. The recommended option here is "**Restart the Service" (3)**.

Once you have made the changes, confirm them by clicking on "**Apply" (4)**.

Once you have made all the changes to the service, return to the "**General**" tab and "**Start**" the service.

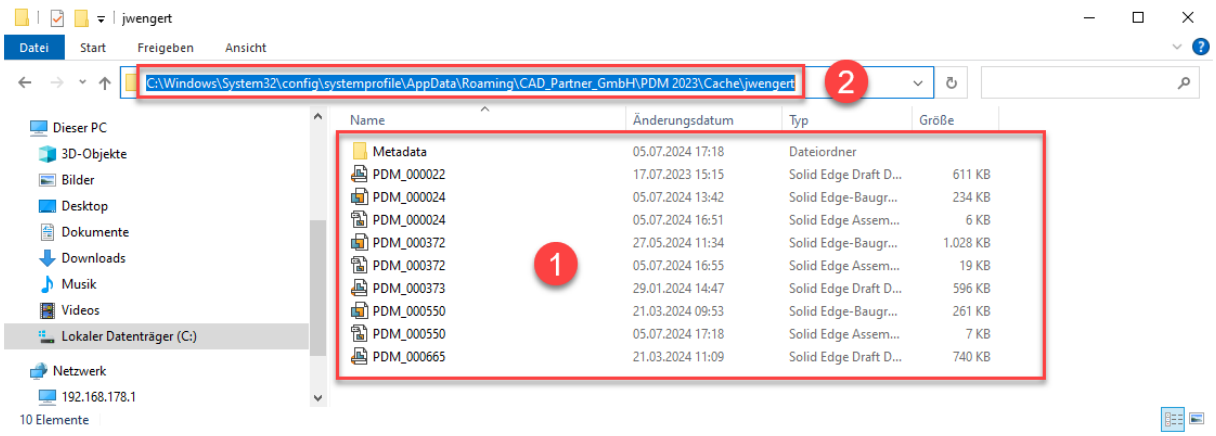
Confirm with "**OK**" to leave the "**Service Properties**" window.



In our case, the status after the service is started is "**Running**" and the "**Startup Type**" is now "**Automatic**".

Important

The location of the "**Local Cache**" on the server running the Automation Server changes when the Automation Server is run as a service.



The new "**Local Cache**" **(1)** is now located in the "**Systemprofile**" folder: "**C:\Windows\System32\config\systemprofile\AppData\Roaming\CAD_Partner_GmbH\PDM 2023\Cache**" followed by the **username** of the user who sent the job.

Background

The "**C:\Windows\System32\config\systemprofile\AppData\Roaming**" folder is part of the **SYSTEM account profile** and is used by applications and services that run under that account. The roaming folder is specifically intended for data that is associated with the user account and can be synchronised across different devices that log on to the same network or domain.

Purpose of the roaming folder in the system profile

- **Store application configurations**: Many applications store configuration files and user settings in the roaming folder, as this data can be synchronised between computers if the user profile is portable.
- **Services and system applications**: Services running under the SYSTEM account use this folder to store data that should remain persistent between different versions of the application.

Typical content

- **Application-specific data**: Folders and files used by installed services and system applications to store settings, logs, or other necessary data.
- **User-specific settings**: Although the SYSTEM user does not normally have any interactive user settings, some services may store settings here that are necessary for their operation.

Differences between the Roaming folder and the other AppData folders

- Local: The Local folder (C:\Windows\System32\config\systemprofile\AppData\Local) contains data that is specific to the machine and is not synchronised.
- LocalLow: The LocalLow folder contains data that is used by applications that run in a restricted security context.

Management and Access

- Administrator rights: Access to this folder usually requires administrator rights, as changes to this data can affect system-wide services and applications.
- Caution when making changes: Manual changes to these folders can cause unexpected behaviour of services and applications. It is therefore recommended that such changes are only made with sound knowledge and caution.

Limitations of Automation Server as a Service

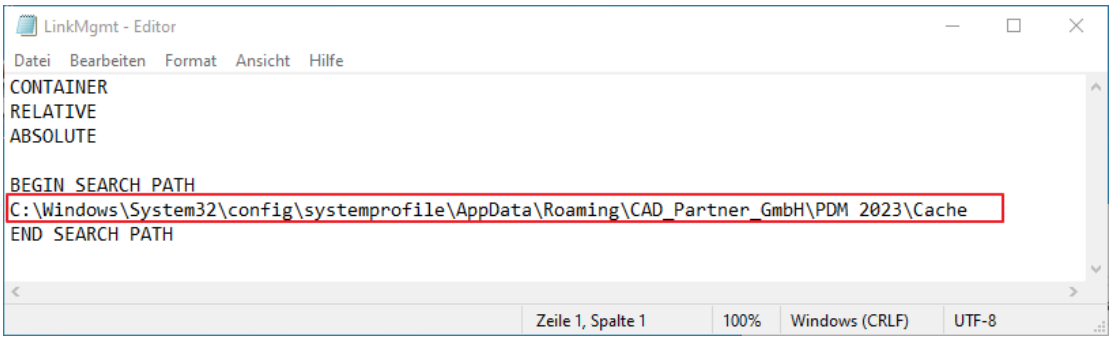
SOLIDWORKS and XML integrated applications (Autodesk Inventor, Siemens NX) are not currently supported when running Automation Server as a service. These applications require a user login.

Restrictions on free CadPartner automation plugins: All plugins that require the Windows clipboard to work properly cannot be used when the Automation Server is running as a service. This is because the operation of these plugins (working with Windows clipboard) requires a user to be logged on to the computer running the Automation Server.

The following plugins are affected: BOM-Excel, Update-SE-Draft Headers

Very important: If you update a workflow or add new workflows, you must restart the Automation Service and PDM Studio for the changes to take effect.

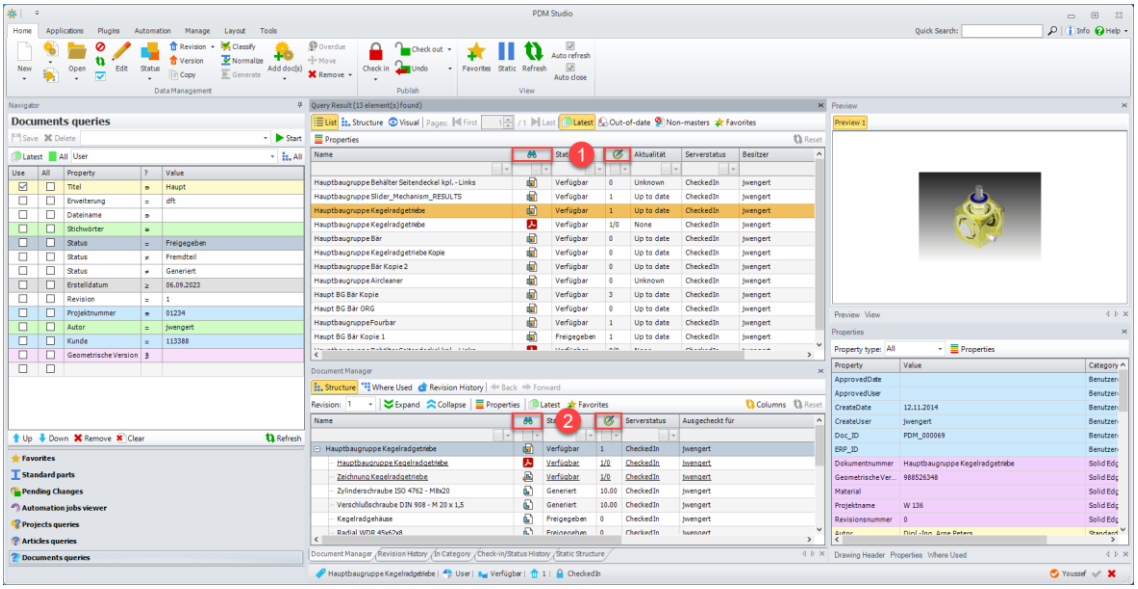
Note Solid Edge



Please note that if the Automation Server is running as a service and you use plugins in an Automation workflow (such as the Rename by Properties plugin) that copy assembly files and/or drawings from the "Local Cache" to another directory, these files will lose their links to their children. The Solid Edge "LinkMgmt.txt" must be set to the new "Local Cache path" so that the assembly/drawing can find its links (children) again.

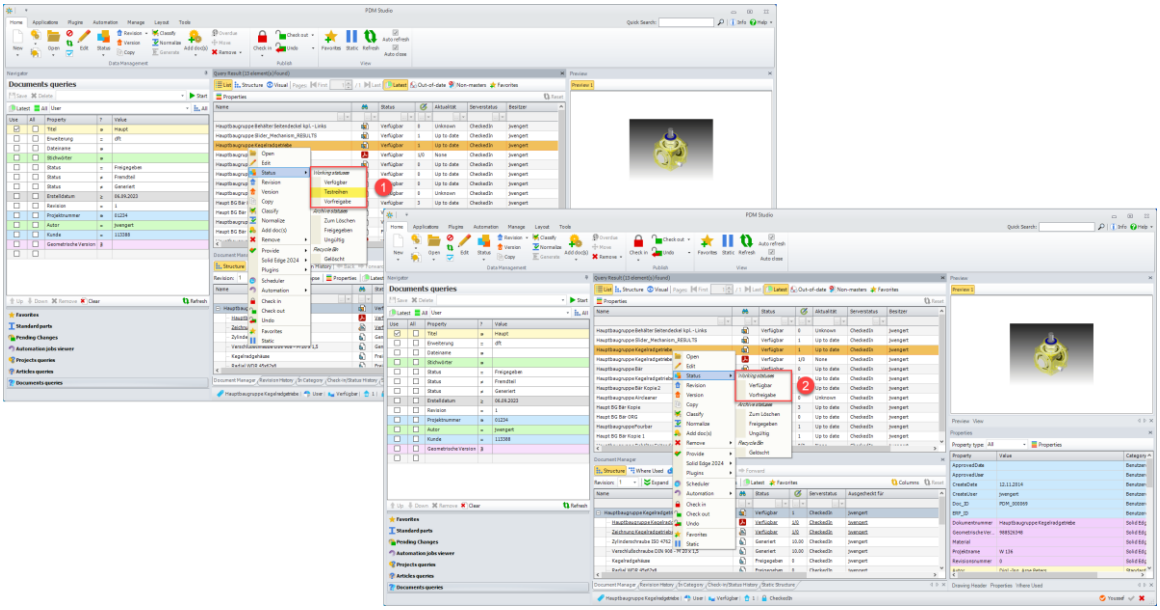
PDM Studio

Icons in the headers



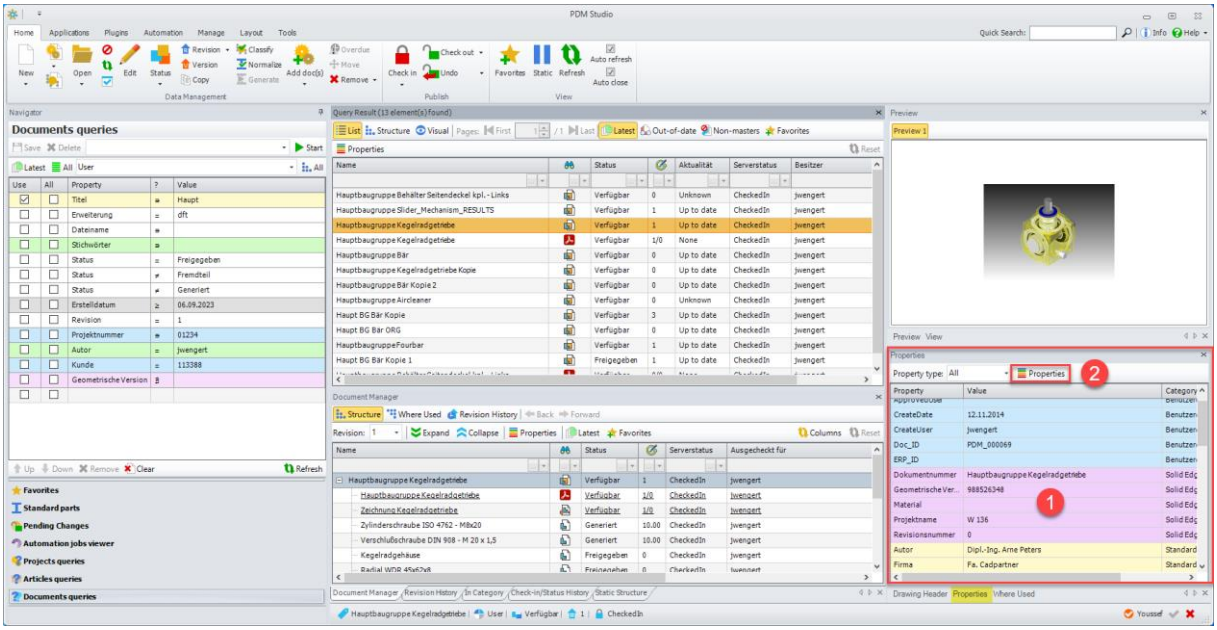
After adding the "**Extension**" and "**Revision**" header text icons in the Client Administrator, the icons are now displayed instead of the "**Extension**" and "**Revision**" **text (1,2)** wherever the "**Extension**" and "**Revision**" header text is displayed.

Status visibility

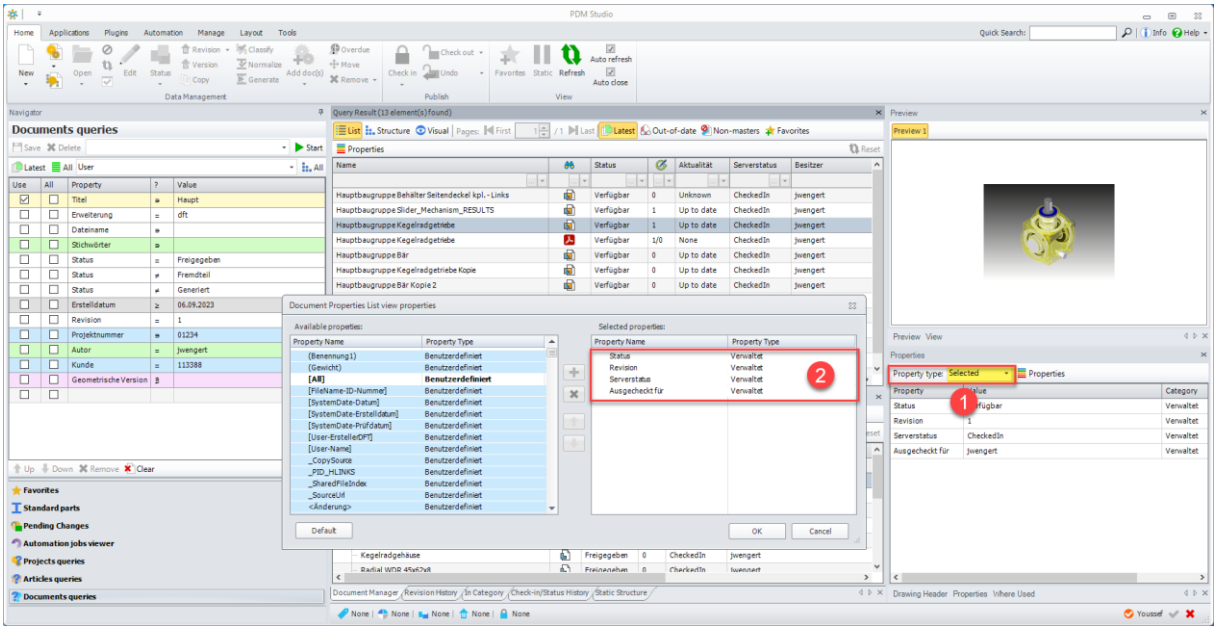


In the **upper illustration (1)**, the custom "**Testreihe**" working status is set to "**Visible**" in the Client Administrator and is displayed for selection in PDM Studio. **In the lower image (2)**, the custom "**Testreihe**" working state is set to "**Hidden**" in the Client Administrator and is no longer available for selection in PDM Studio.

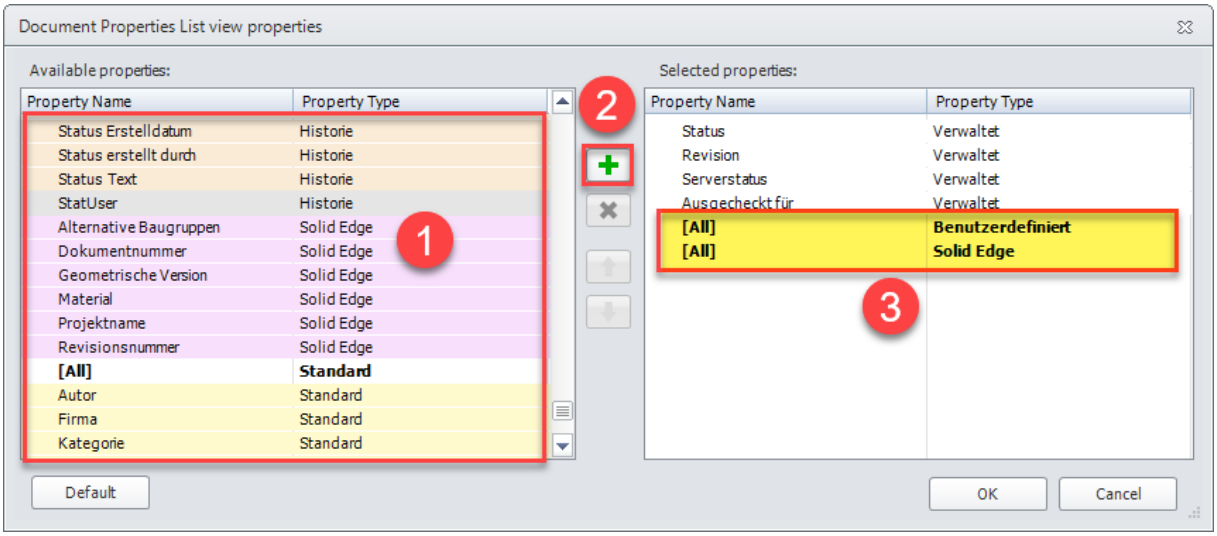
Extended "Display of properties" for the Properties window



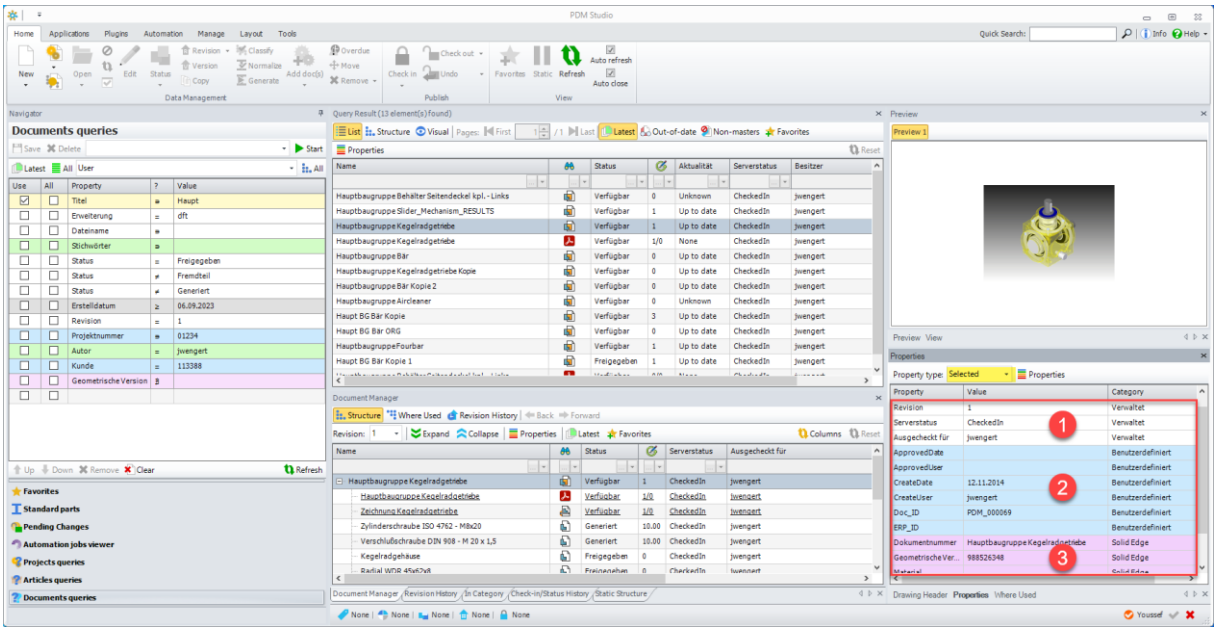
From MP06, properties can be **grouped in the properties window (1) (2)**.



The property type that forms the group of displayed property groups is called "**Selected**" **(1)**. By default, this group only contains the properties defined in the Client Administrator for the **Properties window (2)**.



For example, to add "**[All] Custom Properties**" and "**[ALL] Solid Edge Properties**" to the "**Selected**" group, select them in the "**Available Properties**" **window (1)** and use "**Add**" **(2)** to add them to the group.



As a result, the **defined default properties (1)** now appear, supplemented by the "**Custom properties**" (2) and the "**Solid Edge**" **properties (3)**.

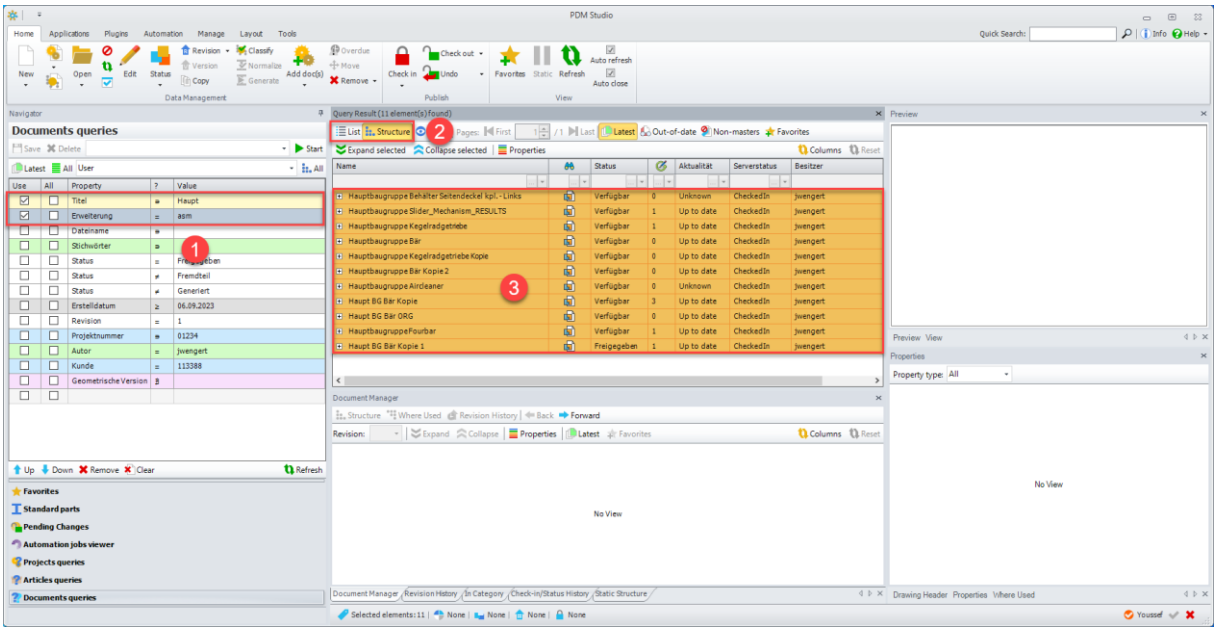
This grouping applies to the property display of documents, projects and articles.

Query results can be copied to the clipboard.

MP06 introduced the ability to copy the contents of any window in PDM Studio to the clipboard (so that it can be pasted into other applications for further editing).

A typical use would be to run a query in PDM Studio and then "**Copy**" the query result to Excel.

Copying in general:



To "**Copy**" the results, **first perform a query (1)** on the documents whose displayed information you wish to **copy (3)**. If the structure is **collapsed in the structure view (3)**, the results of "**Copying**" from the **list or structure view (2) will be identical** in the target application.

***Note**: If you want to select several different items, hold down the **CTRL key** and (while holding down the CTRL key) "**left click**" on the items you want to select. Click all the items you want to select one after the other. The items do not have to be next to each other in the list. To "**deselect**" a selected item, "**left click**" on the selected item again while holding down the **CTRL key**. It will no longer be selected.*

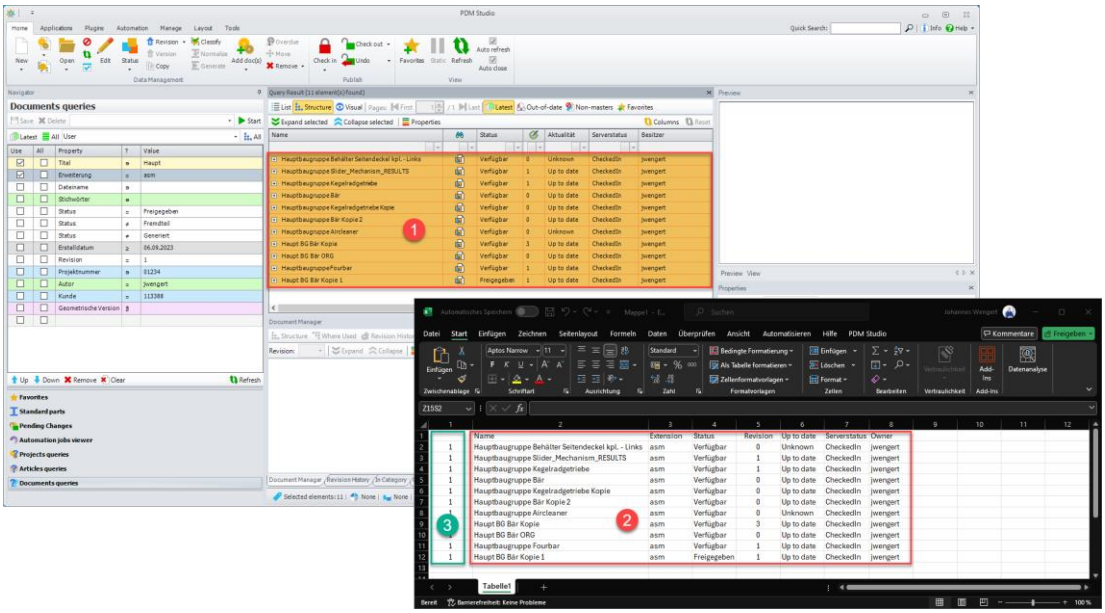
*If you want to select a series of adjacent items, you can use the **SHIFT key**. **First click on the first item** in the row, then hold down the **SHIFT key** and click on **the last item**. All items in the row are now selected and you can **release the SHIFT key**.*

*To copy all items in a structure list, expand the entire structure in the query result and then press "**CTRL + A**". This will **select** "**ALL**" items.*

Copy from list or collapsed structure view

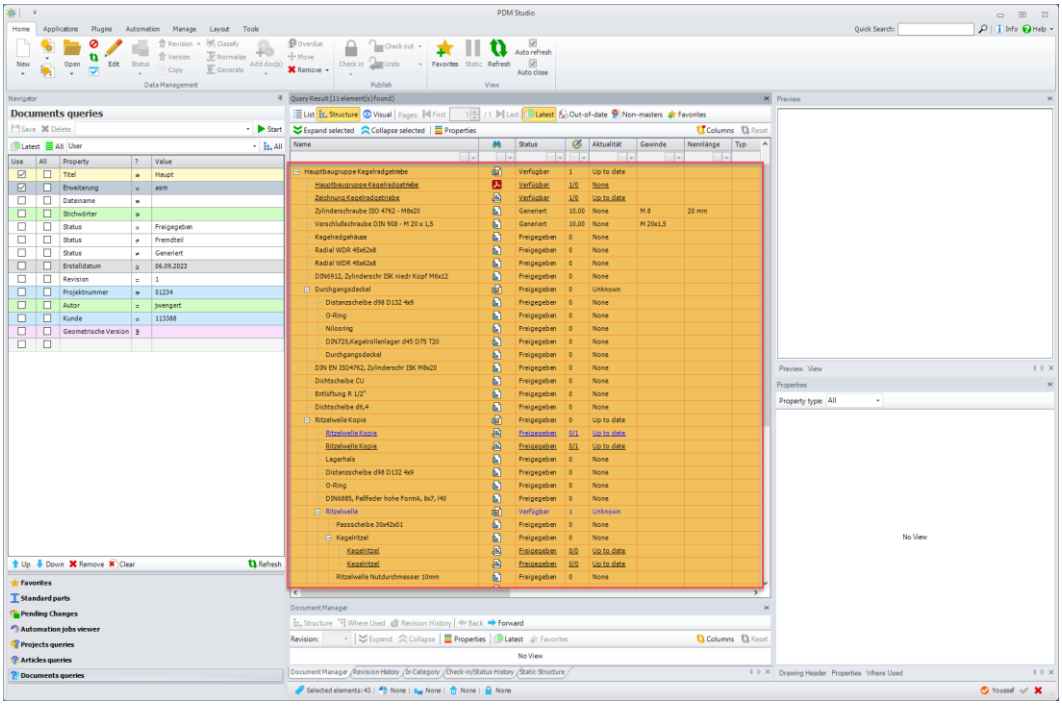
To "**Copy**", select one, several or all cells in the **query result (3)**. Press "**CTRL + C**" to copy the content.

Switch to the target application, in our case Microsoft Excel. Select a cell in Excel and then press the key combination "**CTRL + V**".

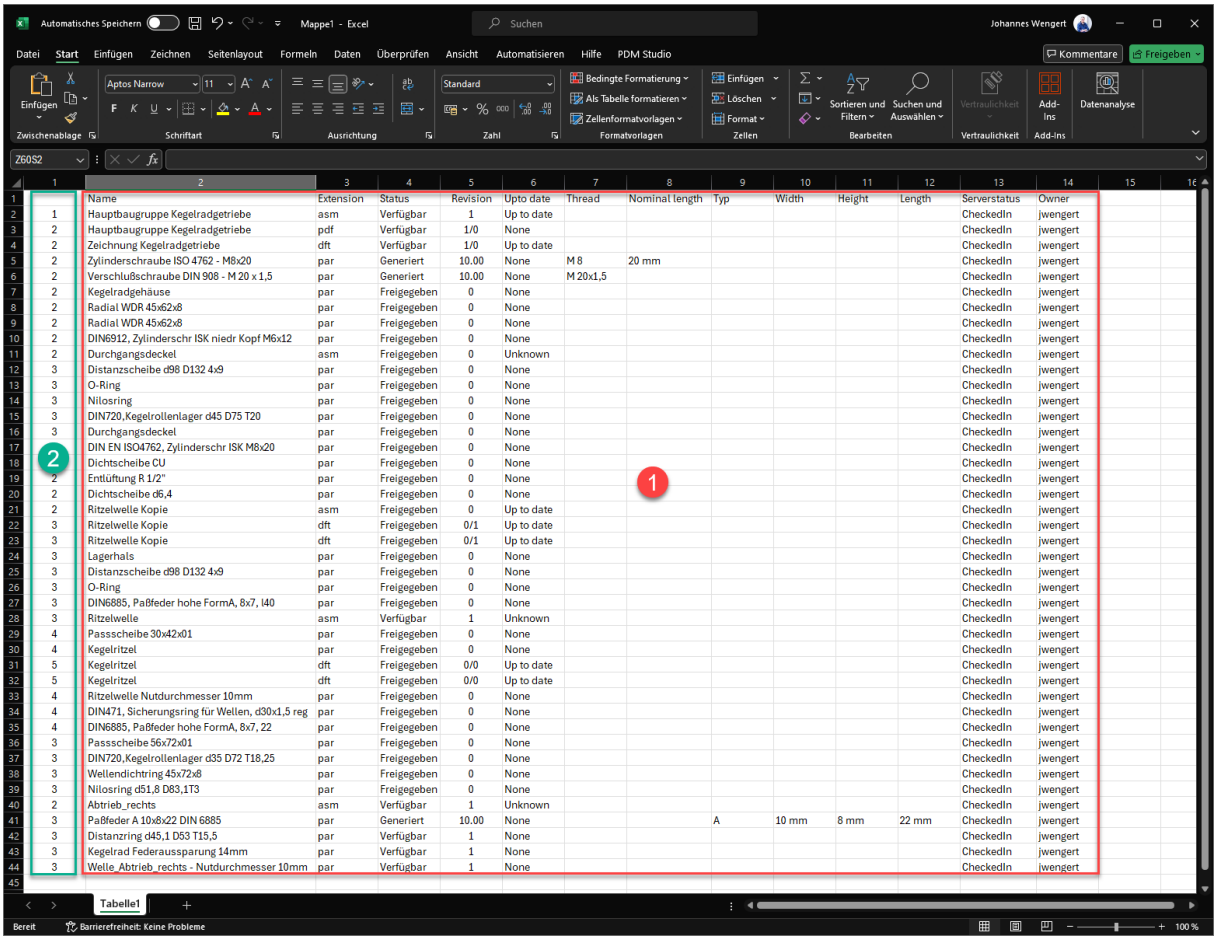


As a result, the "**Copied list**" from the **PDM Studio query result (1)** is displayed in Excel (2). **The number "1" in the first column indicates that all items are in the first level**.

Copying with expanded structure



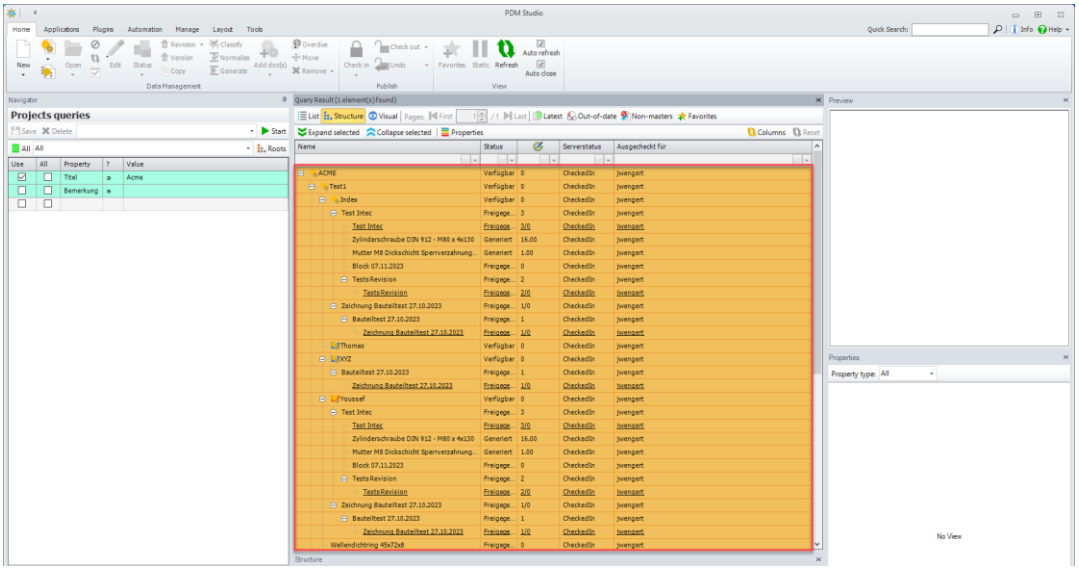
If a root document is fully expanded in the structure view (see previous image) using the "**Expand**" function, selected, copied with "**CTRL+C**" and pasted into Excel, the table changes in the Excel output.



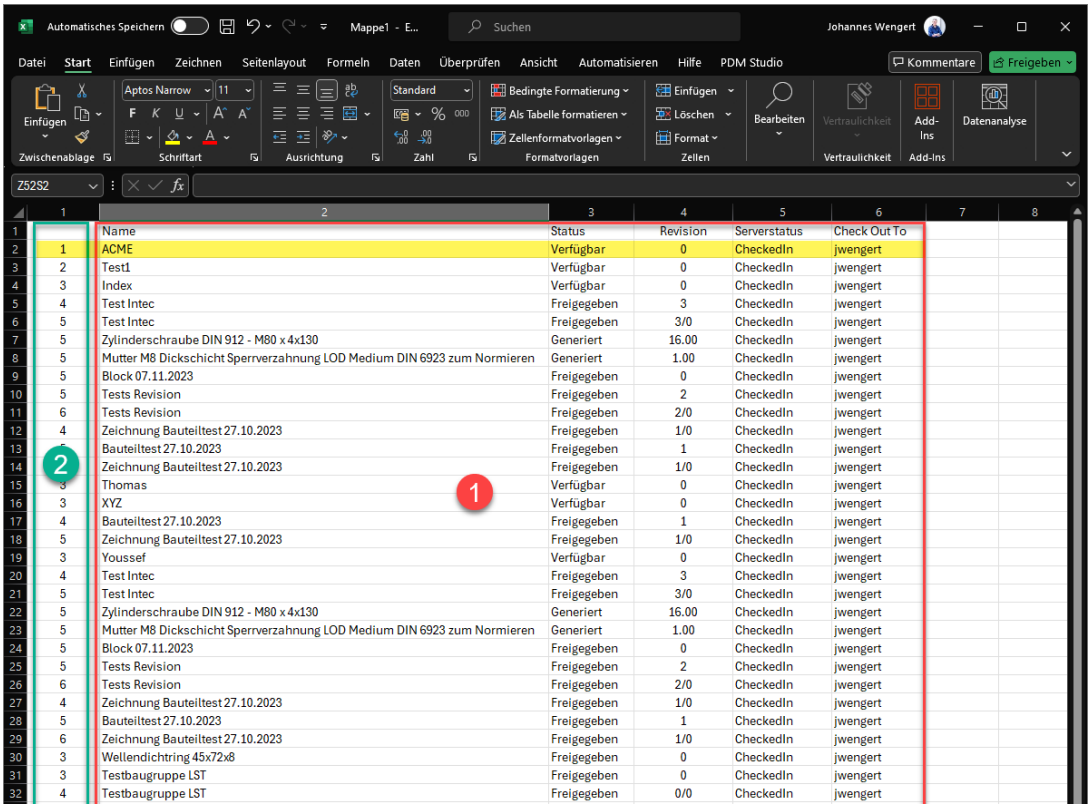
	Name	Extension	Status	Revision	Upto date	Thread	Nominal length	Typ	Width	Height	Length	Serverstatus	Owner
1	Hauptbaugruppe Kegelradgetriebe	asm	Verfügbar	1	Up to date							CheckedIn	jwengert
2	Hauptbaugruppe Kegelradgetriebe	pdf	Verfügbar	1/0	None							CheckedIn	jwengert
2	Zeichnung Kegelradgetriebe	dft	Verfügbar	1/0	Up to date							CheckedIn	jwengert
2	Zylinderschraube ISO 4762 - M8x20	par	Generiert	10.00	None	M 8	20 mm					CheckedIn	jwengert
2	Verschlußschraube DIN 908 - M 20 x 1,5	par	Generiert	10.00	None	M 20x1,5						CheckedIn	jwengert
2	Kegelradgehäuse	par	Freigegeben	0	None							CheckedIn	jwengert
2	Radial WDR 45x62x8	par	Freigegeben	0	None							CheckedIn	jwengert
2	Radial WDR 45x62x8	par	Freigegeben	0	None							CheckedIn	jwengert
2	DIN6912, Zylinderschr ISK niedr Kopf M6x12	par	Freigegeben	0	None							CheckedIn	jwengert
2	Durchgangsdeckel	asm	Freigegeben	0	Unknown							CheckedIn	jwengert
3	Distanzscheibe d98 D132 4x9	par	Freigegeben	0	None							CheckedIn	jwengert
3	O-Ring	par	Freigegeben	0	None							CheckedIn	jwengert
3	Nilosring	par	Freigegeben	0	None							CheckedIn	jwengert
3	DIN720,Kegelrollenlager d45 D75 T20	par	Freigegeben	0	None							CheckedIn	jwengert
3	Durchgangsdeckel	par	Freigegeben	0	None							CheckedIn	jwengert
3	DIN EN ISO4762, Zylinderschr ISK M8x20	par	Freigegeben	0	None							CheckedIn	jwengert
3	Dichtscheibe CU	par	Freigegeben	0	None							CheckedIn	jwengert
3	Entlüftung R 1/2"	par	Freigegeben	0	None							CheckedIn	jwengert
2	Dichtscheibe d6,4	par	Freigegeben	0	None							CheckedIn	jwengert
2	Ritzelwelle Kopie	asm	Freigegeben	0	Up to date							CheckedIn	jwengert
3	Ritzelwelle Kopie	dft	Freigegeben	0/1	Up to date							CheckedIn	jwengert
3	Ritzelwelle Kopie	dft	Freigegeben	0/1	Up to date							CheckedIn	jwengert
3	Lagerhals	par	Freigegeben	0	None							CheckedIn	jwengert
3	Distanzscheibe d98 D132 4x9	par	Freigegeben	0	None							CheckedIn	jwengert
3	O-Ring	par	Freigegeben	0	None							CheckedIn	jwengert
3	DIN6885, Paßfeder hohe FormA, 8x7, l40	par	Freigegeben	0	None							CheckedIn	jwengert
3	Ritzelwelle	asm	Verfügbar	1	Unknown							CheckedIn	jwengert
4	Passscheibe 30x42x01	par	Freigegeben	0	None							CheckedIn	jwengert
4	Kegelritzel	par	Freigegeben	0	None							CheckedIn	jwengert
5	Kegelritzel	dft	Freigegeben	0/0	Up to date							CheckedIn	jwengert
5	Kegelritzel	dft	Freigegeben	0/0	Up to date							CheckedIn	jwengert
4	Ritzelwelle Nutdurchmesser 10mm	par	Freigegeben	0	None							CheckedIn	jwengert
4	DIN471, Sicherungsring für Wellen, d30x1,5 reg	par	Freigegeben	0	None							CheckedIn	jwengert
4	DIN6885, Paßfeder hohe FormA, 8x7, 22	par	Freigegeben	0	None							CheckedIn	jwengert
3	Passscheibe 56x72x01	par	Freigegeben	0	None							CheckedIn	jwengert
3	DIN720,Kegelrollenlager d35 D72 T18,25	par	Freigegeben	0	None							CheckedIn	jwengert
3	Wellendichtring 45x72x8	par	Freigegeben	0	None							CheckedIn	jwengert
3	Nilosring d51,8 D83,1T3	par	Freigegeben	0	None							CheckedIn	jwengert
2	Abtrieb_rechts	asm	Verfügbar	1	Unknown							CheckedIn	jwengert
3	Paßfeder A 10x8x22 DIN 6885	par	Generiert	10.00	None			A	10 mm	8 mm	22 mm	CheckedIn	jwengert
3	Distanzring d45,1 D53 T15,5	par	Verfügbar	1	None							CheckedIn	jwengert
3	Kegelrad Federaussparung 14mm	par	Verfügbar	1	None							CheckedIn	jwengert
3	Welle_Abtrieb_rechts - Nutdurchmesser 10mm	par	Verfügbar	1	None							CheckedIn	jwengert

All documents in the "**Expanded structure**" **(1)** are inserted. The "**First column**" **(2)** always shows the level at which the document is located in relation to the root document in the structure.

Copying project query results



The procedure is identical when copying query results from project queries.

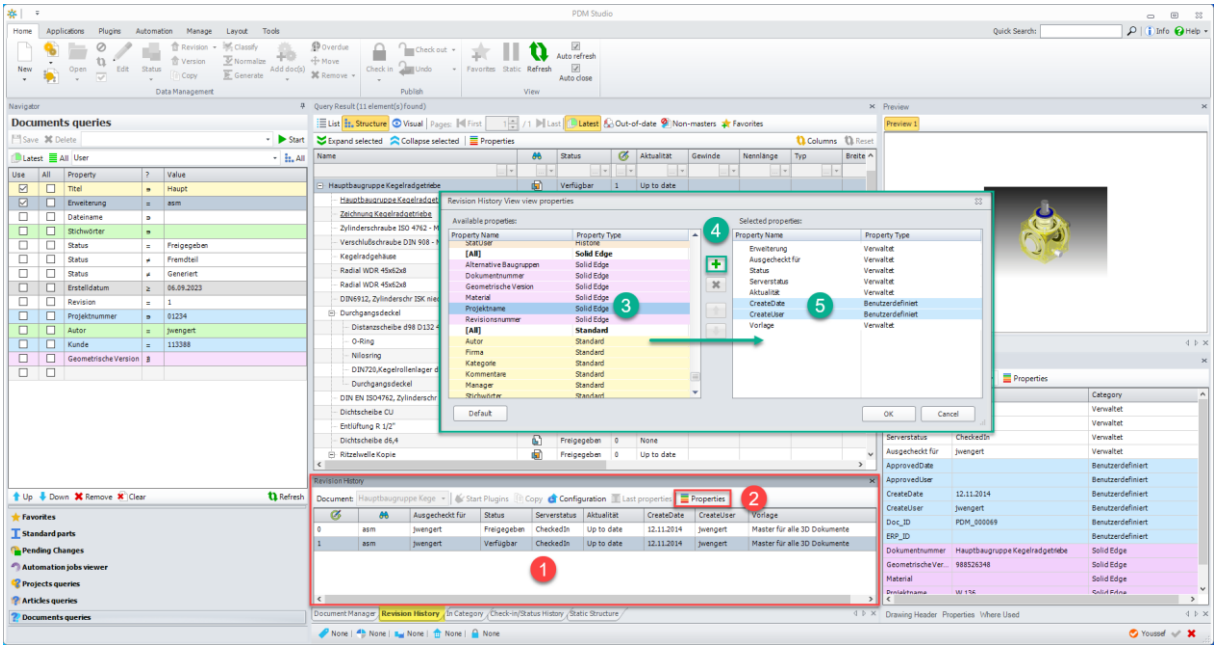


		Name	Status	Revision	Serverstatus	Check Out To
2	1	ACME	Verfügbar	0	CheckedIn	jwengert
3	2	Test1	Verfügbar	0	CheckedIn	jwengert
4	3	Index	Verfügbar	0	CheckedIn	jwengert
5	4	Test Intec	Freigegeben	3	CheckedIn	jwengert
6	5	Test Intec	Freigegeben	3/0	CheckedIn	jwengert
7	5	Zylinderschraube DIN 912 - M80 x 4x130	Generiert	16.00	CheckedIn	jwengert
8	5	Mutter M8 Dickschicht Sperrverzahnung LOD Medium DIN 6923 zum Normieren	Generiert	1.00	CheckedIn	jwengert
9	5	Block 07.11.2023	Freigegeben	0	CheckedIn	jwengert
10	5	Tests Revision	Freigegeben	2	CheckedIn	jwengert
11	6	Tests Revision	Freigegeben	2/0	CheckedIn	jwengert
12	4	Zeichnung Bauteiltest 27.10.2023	Freigegeben	1/0	CheckedIn	jwengert
13	2	Bauteiltest 27.10.2023	Freigegeben	1	CheckedIn	jwengert
14	3	Zeichnung Bauteiltest 27.10.2023	Freigegeben	1/0	CheckedIn	jwengert
15	3	Thomas	Verfügbar	0	CheckedIn	jwengert
16	3	XYZ	Verfügbar	0	CheckedIn	jwengert
17	4	Bauteiltest 27.10.2023	Freigegeben	1	CheckedIn	jwengert
18	5	Zeichnung Bauteiltest 27.10.2023	Freigegeben	1/0	CheckedIn	jwengert
19	3	Youssef	Verfügbar	0	CheckedIn	jwengert
20	4	Test Intec	Freigegeben	3	CheckedIn	jwengert
21	5	Test Intec	Freigegeben	3/0	CheckedIn	jwengert
22	5	Zylinderschraube DIN 912 - M80 x 4x130	Generiert	16.00	CheckedIn	jwengert
23	5	Mutter M8 Dickschicht Sperrverzahnung LOD Medium DIN 6923 zum Normieren	Generiert	1.00	CheckedIn	jwengert
24	5	Block 07.11.2023	Freigegeben	0	CheckedIn	jwengert
25	5	Tests Revision	Freigegeben	2	CheckedIn	jwengert
26	6	Tests Revision	Freigegeben	2/0	CheckedIn	jwengert
27	4	Zeichnung Bauteiltest 27.10.2023	Freigegeben	1/0	CheckedIn	jwengert
28	5	Bauteiltest 27.10.2023	Freigegeben	1	CheckedIn	jwengert
29	6	Zeichnung Bauteiltest 27.10.2023	Freigegeben	1/0	CheckedIn	jwengert
30	3	Wellendichtring 45x72x8	Freigegeben	0	CheckedIn	jwengert
31	3	Testbaugruppe LST	Freigegeben	0	CheckedIn	jwengert
32	4	Testbaugruppe LST	Freigegeben	0/0	CheckedIn	jwengert

The result of "**Copying**" the query result in Excel is that the root document (shown as number "1" in the first column) **(2)** is in this case the **selected project and the sub-projects, folders and documents (1)** in the **first column (2)** indicate the level at which the various objects in the structure are located with respect to the root project.

"Properties" function now available in "Revision History" and "Check-in/Status History" views

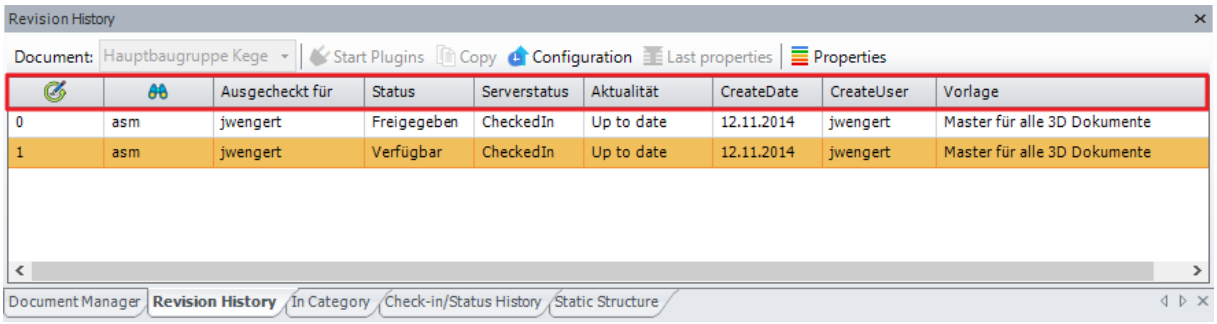
As described in the Client Administrator chapter, additional windows in PDM Studio have been "**Enabled**" in the Client Administrator settings, allowing additional properties to be displayed in most of the PDM Studio windows.



Using the Revision History window as an example (this also applies to the Status History and other windows), the "**Properties**" **function (2)** is now active in the "**Revision History**" **window (1)**.

*Note: The "**Properties**" function is only active in the windows if it has been enabled in the Client Administrator.*

The **existing properties (3)** can now be added to the **display table (4)** using the **Properties function (2)**.

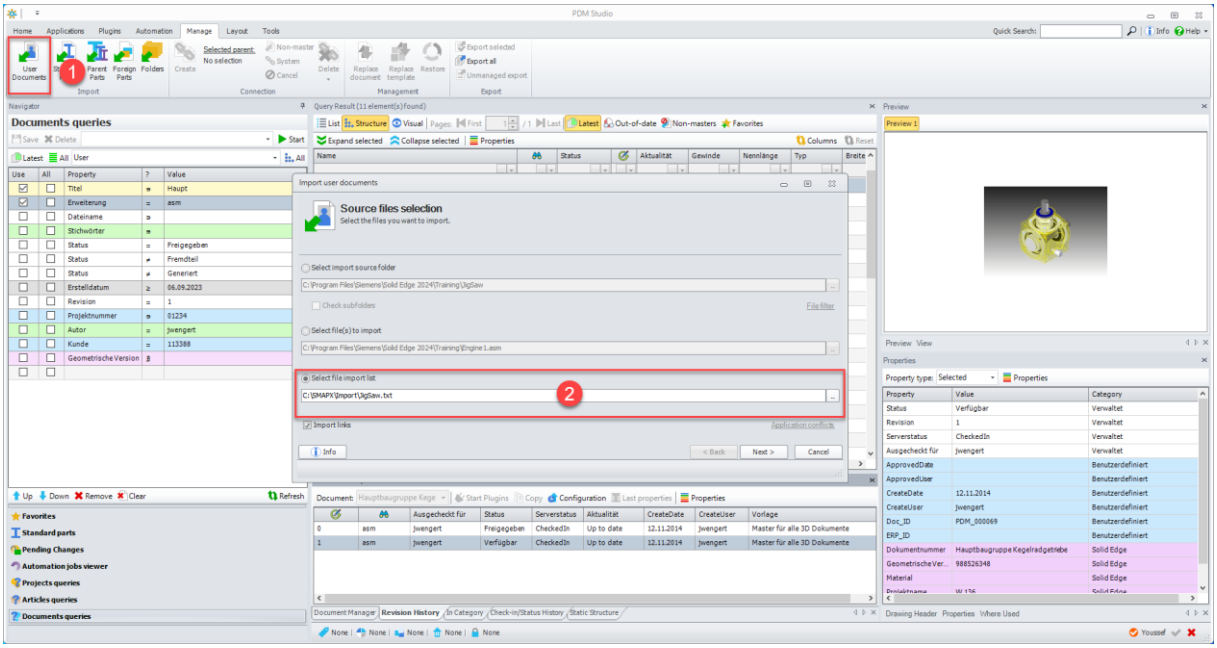


As a result, the additional properties are now displayed in the "**Revision History**" window.

Note: As mentioned above, this procedure applies to all windows where the Properties function is available.

Extended selection of files for importing documents

A new import option "**Select file import list**" **(2)** has been added to the user **document import (1)** in MP06.



The file import list is a simple text file containing a list of documents to be imported. This allows the user to create a list of data to be imported from different folders.

Example content of file import list

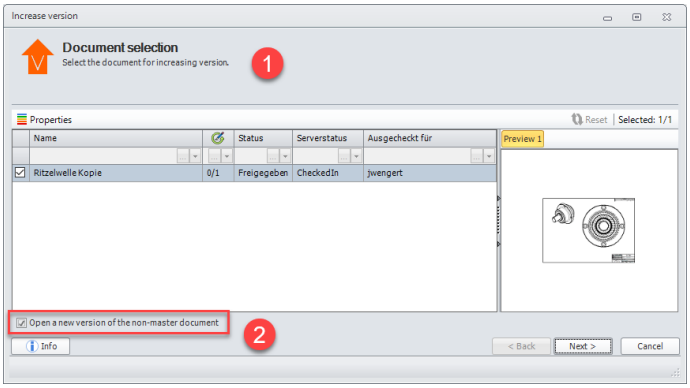
X:\project1\subproject1\myfile1.par
X:\project1\subproject2\myfile1.par
X:\project3\subproject2\myfile1.par
X:\project4\subproject1\myfile2.asm

Important: The text file must contain a simple list of paths to the document(s) to be imported. Each path must be on a separate line.

*Note: For use with Solid Edge, the Solid Edge assembly configuration files "***.cfg**" must be removed from the file list.*

Opening non-master documents after completing the "Increase version" wizard

MP06 introduced the option of opening non-master documents after the process has been completed when increasing versions.



When you "**Version**" a **released non-master document**, you now have the option in the first step of the "**Increase version**" **wizard (1)** to open the document directly after the process is complete using the "**Open a new version of the non-master document**" **option (2)**.

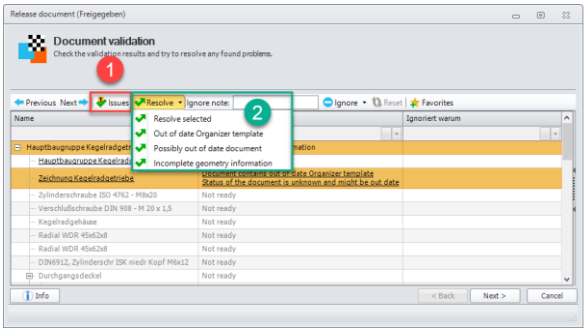
Improvements to the wizards for Release, Revision and Copy

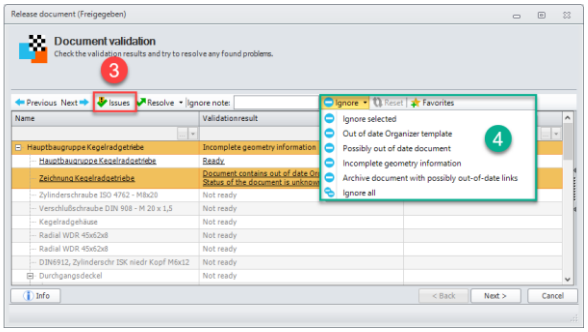
Various problems can occur in the "**Document validation**" step of the release, copy or revision wizard.

Example:

1. A document has different problems (resolvable, ignorable or both types)
2. Not all documents in the structure have the same problems

Previously, you could only resolve all issues for the selected documents together, OR ignore all problems for the selected documents together, OR ignore all problems for all documents. In many cases this was not sufficient and not very flexible.



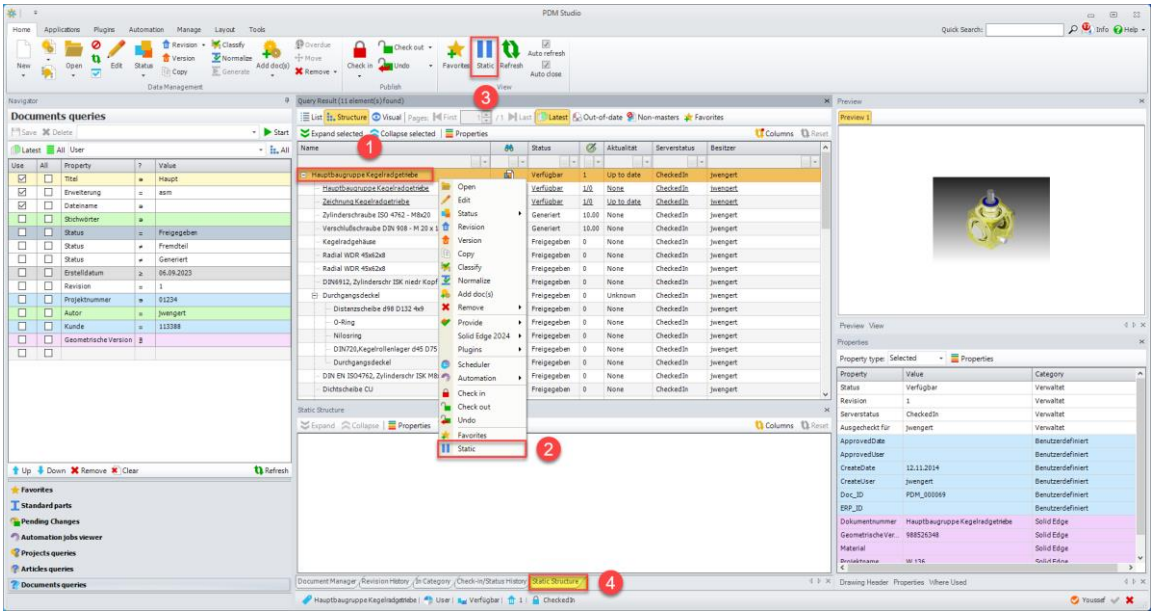


In MP06, the "**Resolve**" **(2)** and "**Ignore**" **(4)** functions have been **extended to include a selection list (2,4) of problems found**.

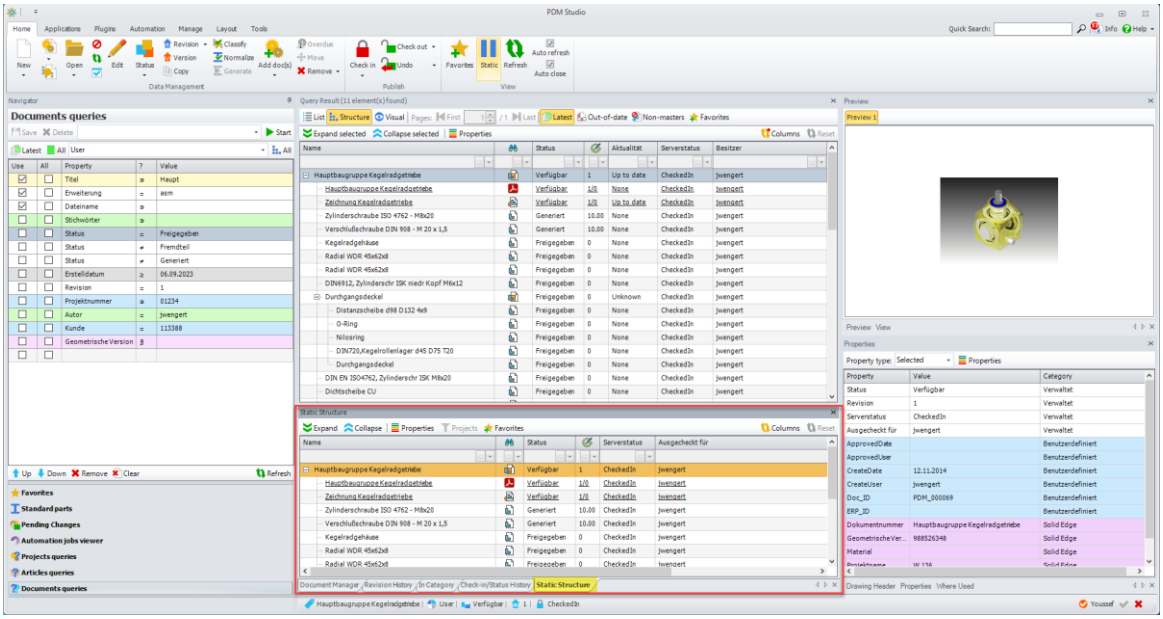
If the "**Issues**" **(1,3)** function is first clicked in the wizard to select all conflicts, then when the "**Resolve**" **(2)** and "**Ignore**" **(4)** functions are clicked, all the problems found are displayed in a selection list and can be processed individually or all at once with "**Resolve selected**" or "**Ignore selected**".

Add an item to the Static Structure window in PDM Studio

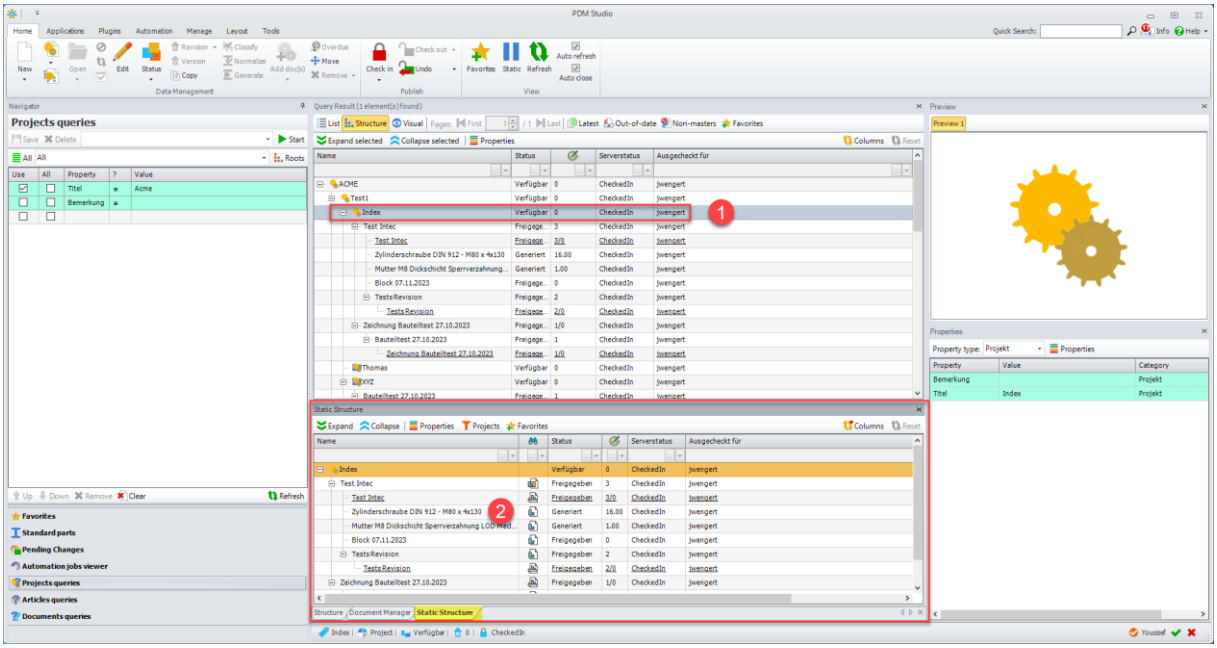
Previously it was only possible to populate the Static Structure window from an external application. MP06 now allows you to **populate the Static Structure window** with documents/projects/articles/standard categories **from within PDM Studio**.



To assign a document/project/article or a standard category to the "**Static Structure**" window (4), first **select the document/project/article or the standard category (1)** and then click on the "**Static**" function in the **context menu (2) or on the Home tab of the ribbon (3)**.



The "**Static Structure**" window will now be filled, i.e. with the document selected from the document query.



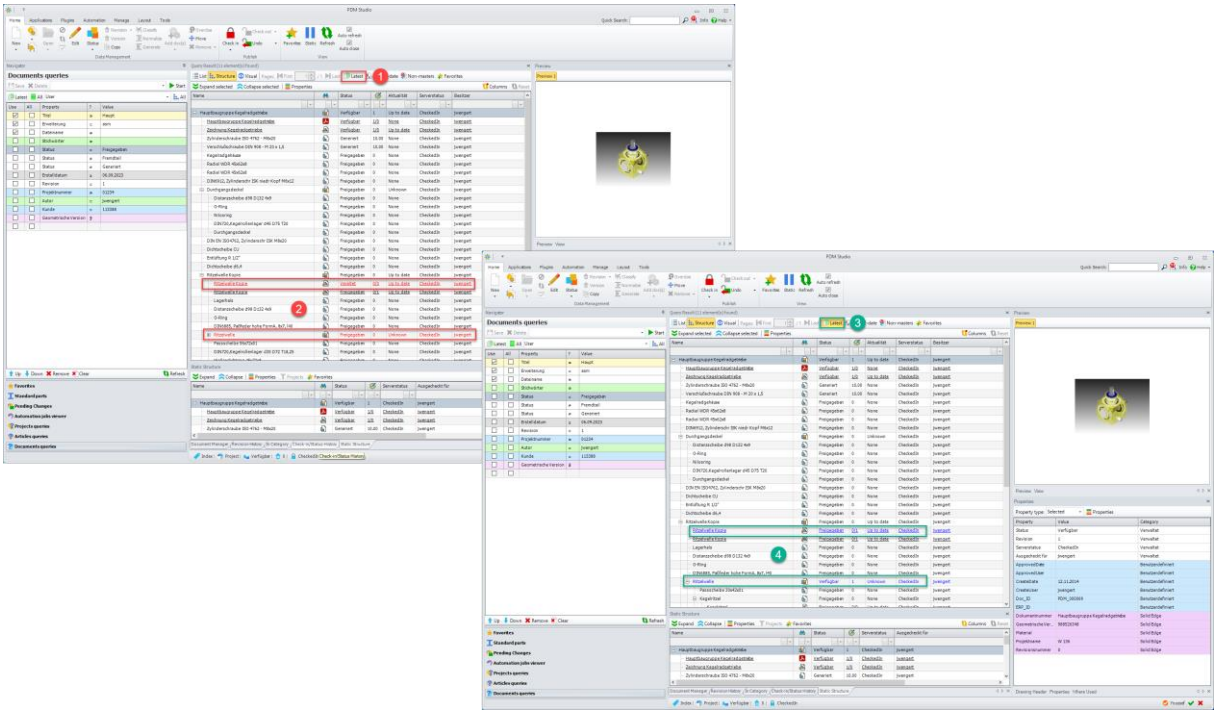
In this further example, the "**Static Structure**" window (2) is now filled with the "**selected project**" **(1)** from the project query.

*Note: The "**Static Structure**" window displays the structure (items with nested sub-items) of the document/project/article or standard category assigned to this window.*

Important: The "Static Structure" window remains empty or its contents do not change until the user reassigns a document/project/item/standard category, either via the "PDM Studio" function in the "PDM Studio" tab from an external application (for documents), or in PDM Studio (for documents/projects/articles/standard categories) via the "Static" function.

Changes to the "Latest" command in the "Query Result" and "Structure" windows

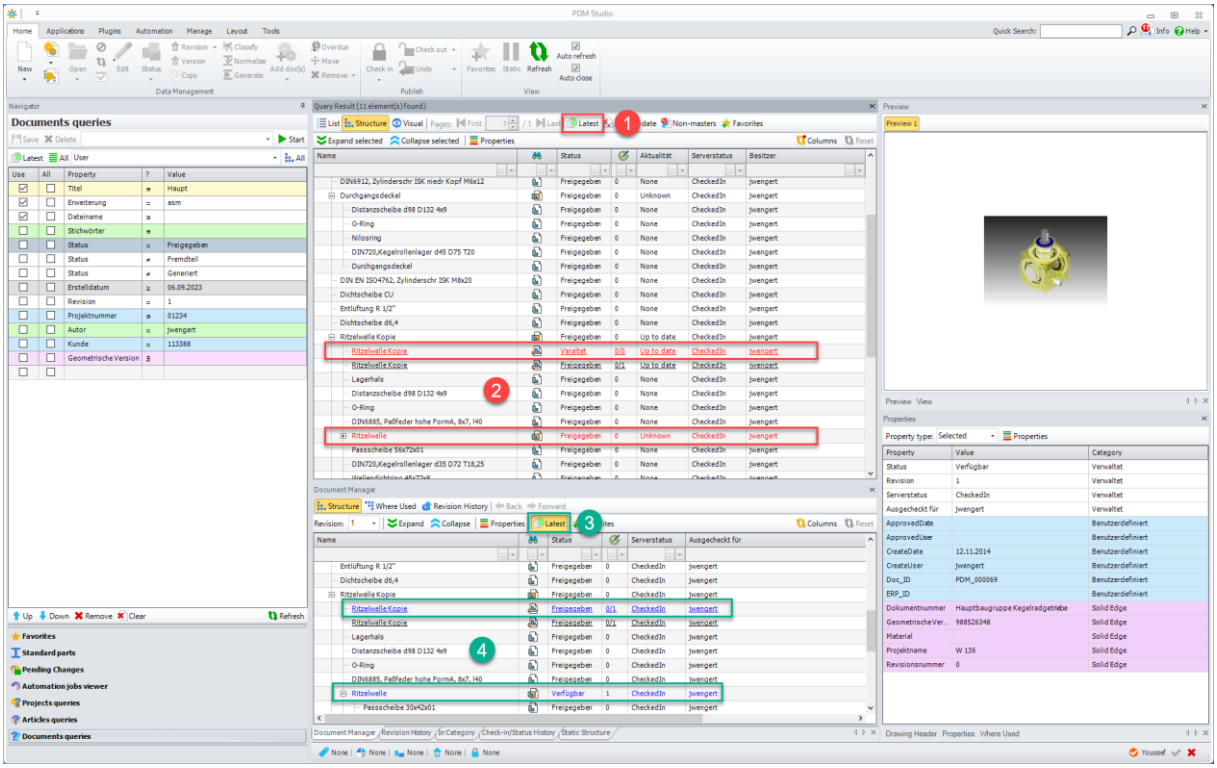
MP06 improves the "**Latest**" function in the Query Results, Structure and Document Manager windows for documents/projects and articles.



If the "**Latest**" **function is deactivated (1)**, the assembly structure is displayed as it really is. In our example, the assembly structure contains "**Out of date**" **documents (2)**, which are marked "Red".

If the "**Latest**" **function is activated (3)**, all documents in the structure (unless they already have the latest version) will be replaced by their latest versions and displayed in the color "Blue" (4).

Example document query:

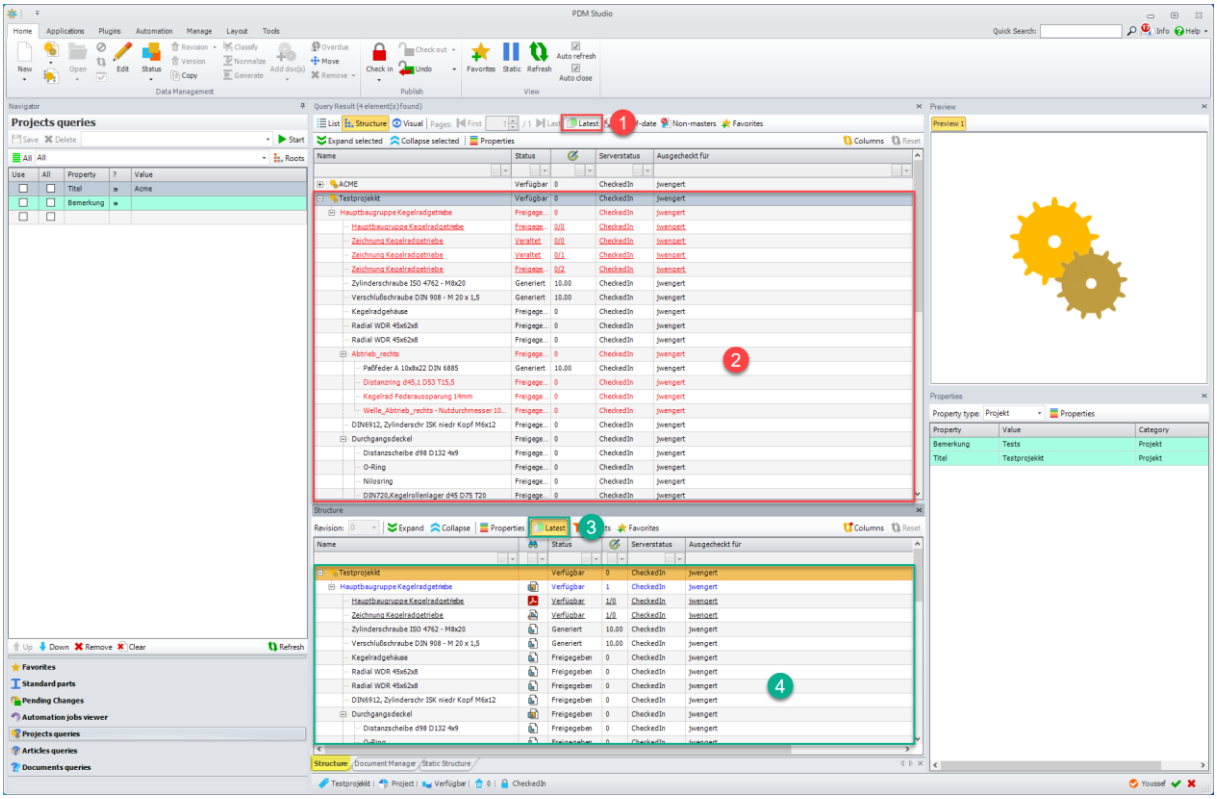


In our example, the assembly in the Query Result document query **contains two documents (2)** that are outdated (shown in "Red"). The "**Latest**" **function (1)** is **disabled** in the Query Result window.

The assembly is selected in the Query Result window and displayed in the Structure view of the Document Manager window. In the Document Manager window, however, the "**Latest**" **function (3)** is **enabled** and the two outdated documents are displayed in their most recent status and are shown in "Blue" **(4)**.

This makes it easy to see how the saved assembly compares to the assembly with the latest changes.

Example project query:



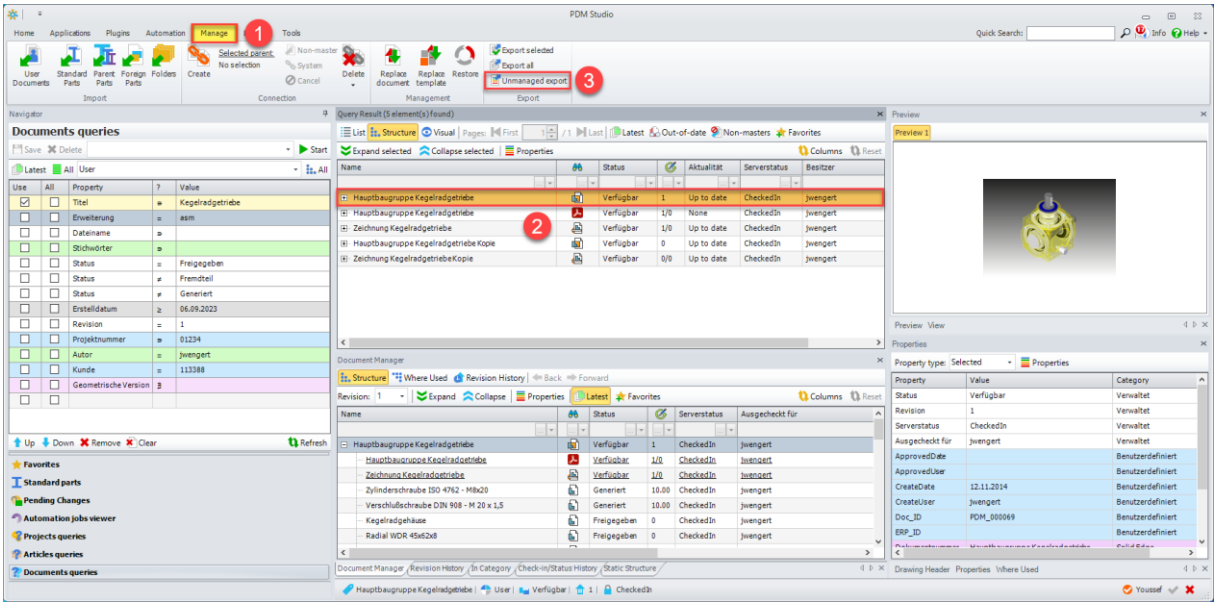
In our example, an **obsolete assembly (2)** is included in the **project found**. The "**Latest**" **function (1) is disabled** in the Query Results window.

The project is selected in the Query Results window and displayed in the Structure view. However, the "**Latest**" **function (3) is enabled** in the **Structure view window** and the project is displayed in "**Blue**" **(4)** in its most recent state.

***Note**: If the "**Latest**" function is enabled in the document, project or item query, the result is the same as in the Structure View example. If "**Latest**" is disabled, the structure is displayed as it was saved.*

"Unmanaged export" function has been integrated into standard product

Previously, the "**Unmanaged Export**" function was integrated as an add-on in a separately installed DLL called "**SmapX.Command.Plugins.dll**" (located in the "**C:\Program Files\CAD-Partner\PDM Studio 2023\Plugins\Commands**" directory). With MP06, "**Unmanaged Export**" has now been integrated directly into PDM Studio as an additional standard export function.



The "**Unmanaged Export**" **function (3)** is now located on the "**Manage**" **tab (1)** of the "**Export**" function group on the PDM Studio ribbon.

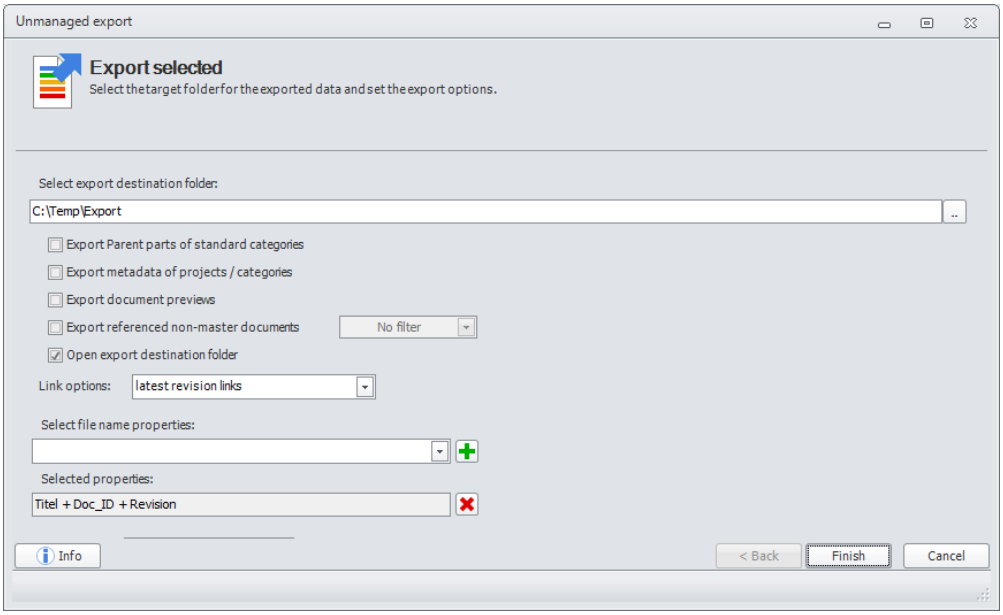
***General**: The "**Unmanaged Export**" **function (3)** allows you to export the currently **selected documents (3), projects, articles or standard categories to an unmanaged location** (local or network folder).*

You can specify how the exported items are to be named.

If a non-generated standard part is selected for export, it will be generated during the export process.

Workflow:

Select one or more documents in the **Query Results window (3)** and click on the "**Unmanaged Export**" **button (2)**.



Settings:

There are the following settings in the first step:

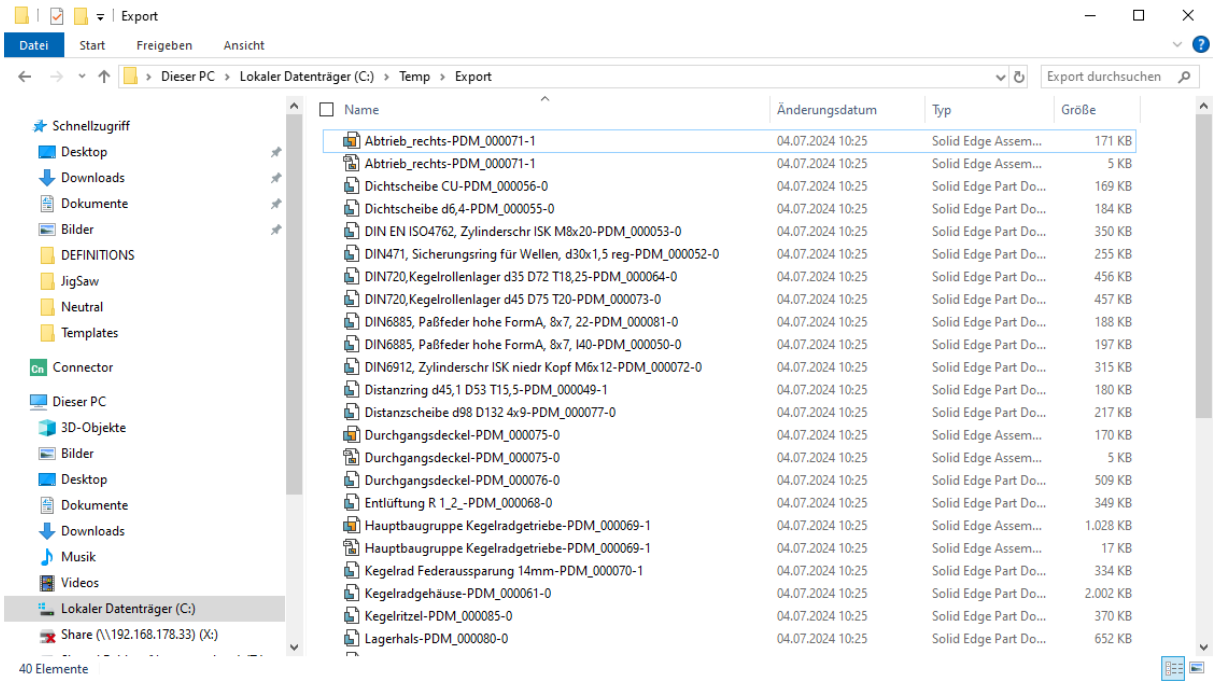
- **Select export destination folder** - the target location for the exported data.
- **Export Parent parts of standard categories** - if a standard category is selected and this option is set, the parent part/s of the standard category is exported together with the generated parts (to a separate ParentParts folder).
- **Export metadata of projects/categories** - if checked and a standard category, a project, or an article is selected, the metadata (previews, documentations, visual navigation) of the category/project is exported.
- **Export document previews** - if checked, previews of the selected documents are exported to the Previews folder.
- **Export referenced non-master documents** - if checked, the non-master documents of the input document/s are exported as well. The Extensions filter drop-down allows exporting only specified non-master document types. Enter the required extension to the box, and then select **Add** ✚ to add the extension to the list.

  The name of the drop-down menu changes as follows:
  - **No Filter**: no filter is set
  - **The extension's name**: one extension is added to the list
  - **Filtered**: more than one extension is added to the list
- **Open export destination folder** - the destination folder is opened after finishing the export process.

- **Link Options** - this option influences the links within the exported item (if there are any). This drop-down menu has the following variants:
  - Select **Original links** to export the item without any changes (with the original revisions of its links).
  - Select **Latest released links** to export the item with the latest released revisions (if the revisions exist) of its links.
  - Select **Latest revision links** to export the item with the current revisions of its links.
- **Select filename properties** - choose the exported items' filenames. They can be composed of several property values. The current filename pattern is displayed in the Selected properties box. To add the respective property to the display name pattern, select the property from the Select display name properties drop-down list, and then select **Add** ✚.
  - **Separator** - add the required separator into the field to set how the properties in the filename are separated when exported.

After making the required setting, select Finish to perform the export.

Sample Export:



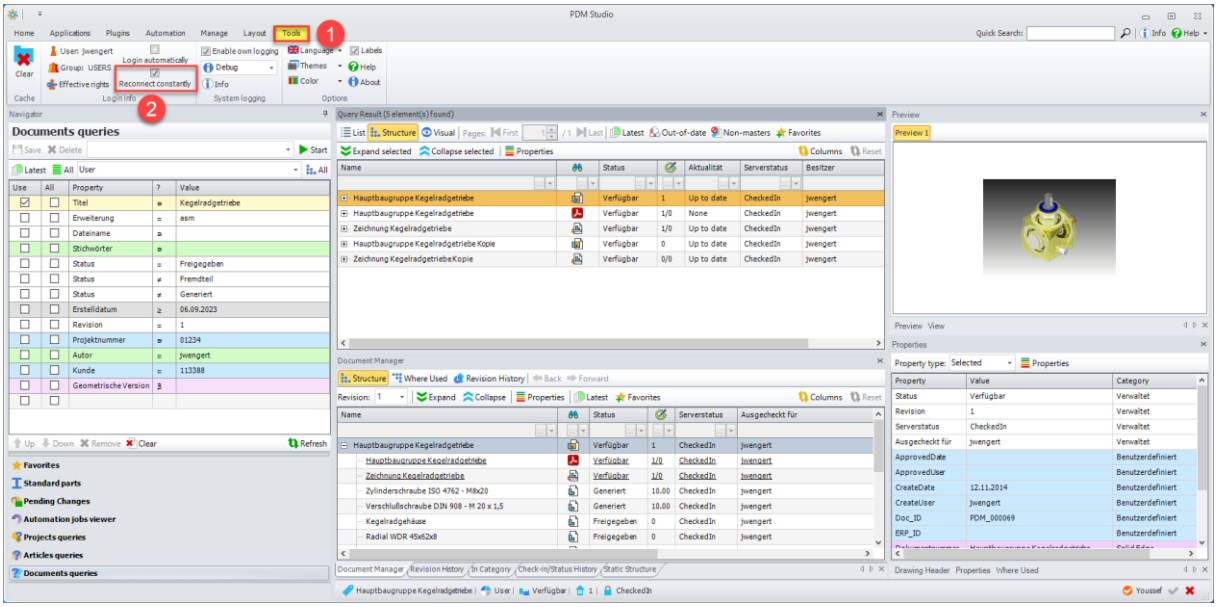
The selected assembly and it's children were exported to the folder using the given naming pattern.

New option to select how clients connect to PDM Studio Server

In the vast majority of cases, an unstable internet or network connection is caused by high network load, long latency times, short interruptions or other disruptions in the network. This primarily affects users who are connected to the company via less stable connections (via VPN or wireless networks such as LTE) from their home office or while travelling.

PDM Studio requires a stable connection to the PDM server, which in most organizations is located in the office. If there are connection problems, it is usually due to faulty routers, switches, outdated firmware in routers and switches, or a firewall that automatically closes the communication port to the PDM server after a pre-defined period of inactivity.

A new option has been introduced in MP06 to reduce disconnection issues. This allows the connection between the PDM Studio client and the server to be continuously re-established in the event of connection problems.



The new option is called "**Reconnect constantly**" **(2)** and can be found in the "**Login Info**" **group** on the "**Tools**" **tab (1)** of the PDM Studio ribbon.

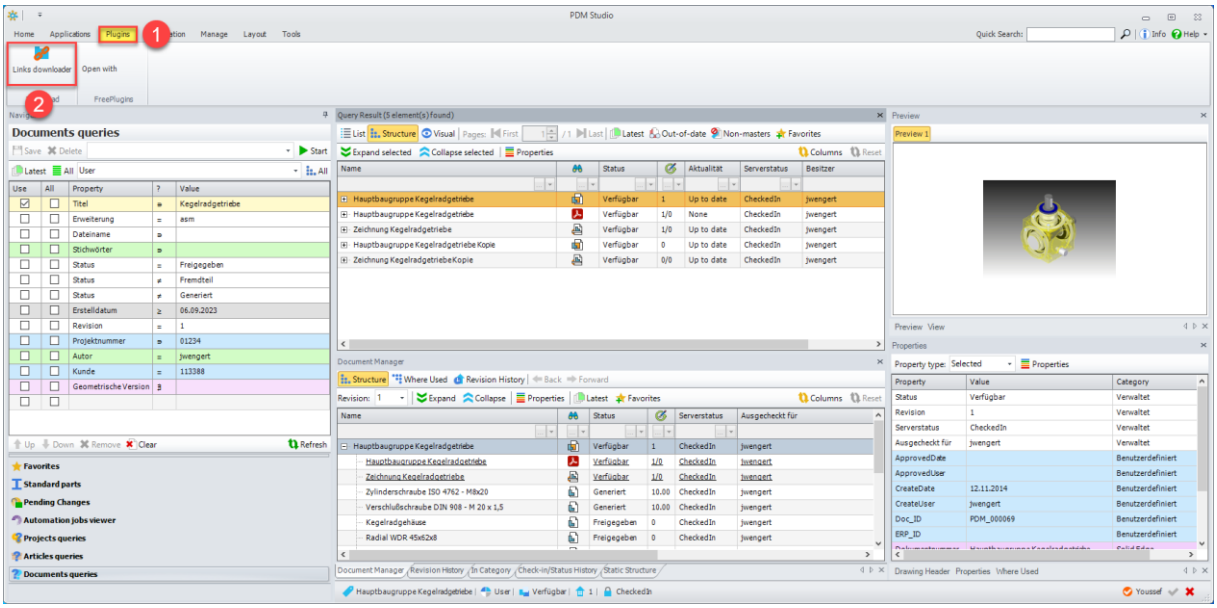
*Note: PDM Studio MUST be restarted after the "**Reconnect constantly**" option has been enabled.*

Important: Even with the new option, it is not guaranteed that all connection problems can be avoided.

Command Plugin "SmapX.Command.Plugins.dll"

The command plugin "**SmapX.Command.Plugins.dll**" is an add-on for PDM Studio and must be installed separately.

For more information on installing the plugin, refer to the "**After installation**" chapter under "Add - Add-on Tools".



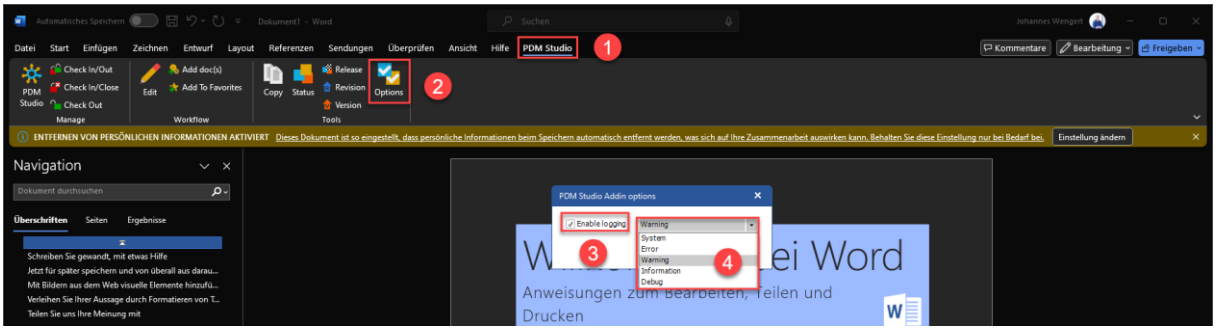
If the "**SmapX.Command.Plugins.dll**" DLL has been added to the PDM Studio installation, the "**Links downloader**" **(2)** add-on it contains is available in the "**Tools**" **tab (1)** of the PDM Studio ribbon.

This function is related to the use of Solid Edge part families (FOP) in PDM Studio. This means that when this function is used, the FOP parents are downloaded together with the FOP members.

Important: The function is only intended for use in part families (FOPs). If part families (FOPs) are not used in PDM Studio, the "SmapX.Command.Plugins.dll" DLL does not need to be installed.

Microsoft Office Integration

Logging of Microsoft Office integrations

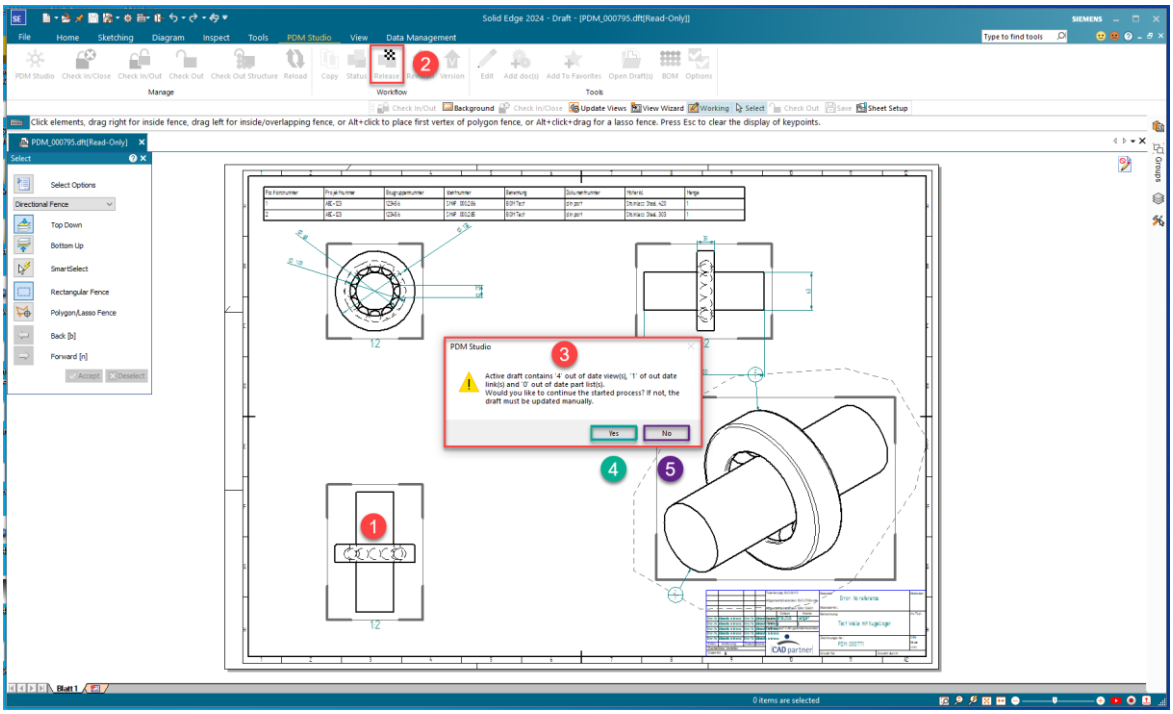


The **Options button (2)** has been added to the **PDM Studio ribbon (1)** in Microsoft Office applications. The options now allow **the logging level (3) to be enabled or disabled** and set independently of the general **diagnostic level** (defined in the Client Administrator) **(4)**.

Solid Edge und SOLIDWORKS Integration

Start the release wizard for out-of-date drawings from Solid Edge and SOLIDWORKS.

Enhancement/modification of the "**Release**" **functionality (2)** for **out-of-date drawings (1)**.



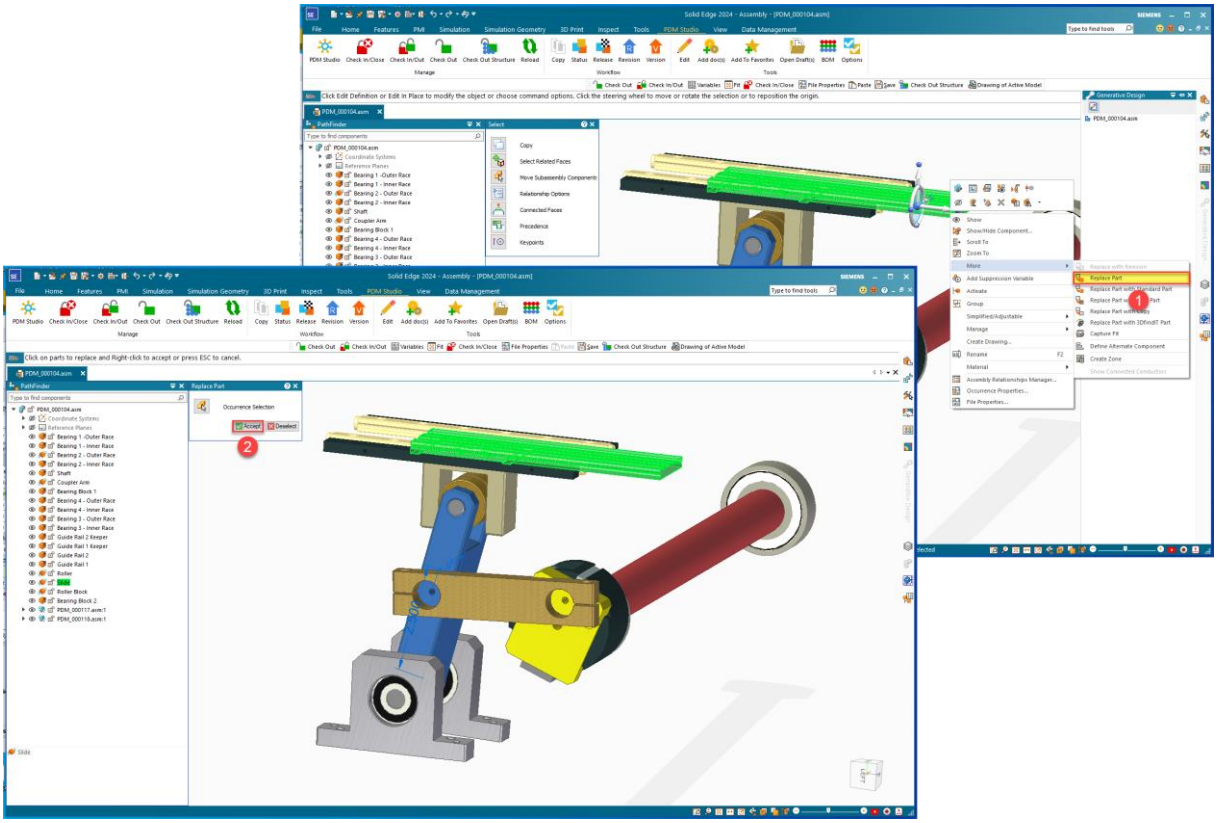
When an **out-of-date drawing (1)** is "**Released**" **(2)** from the PDM Studio toolbar in Solid Edge / SOLIDWORKS, a **warning message (3) appears**. From MP06, you can now choose whether you want the system to correct the out-of-date drawing in the "**Document validation**" **step of the release wizard** using the "**Yes**" **button (4)** (the release wizard is started), or whether you want to **correct it manually** using the "**No**" **button (5)** as before.

Notification text added to the Solid Edge / SOLIDWORKS status bars

Previously, when starting an operation in Solid Edge or SOLIDWORKS (e.g. replacing a part) that required a selection in PDM Studio and the "Provide" command in PDM Studio, the user would not receive any guidance/information/notifications on what to do next in Solid Edge or SOLIDWORKS. Solid Edge or SOLIDWORKS appeared to be frozen and not working, but the applications were just on hold.

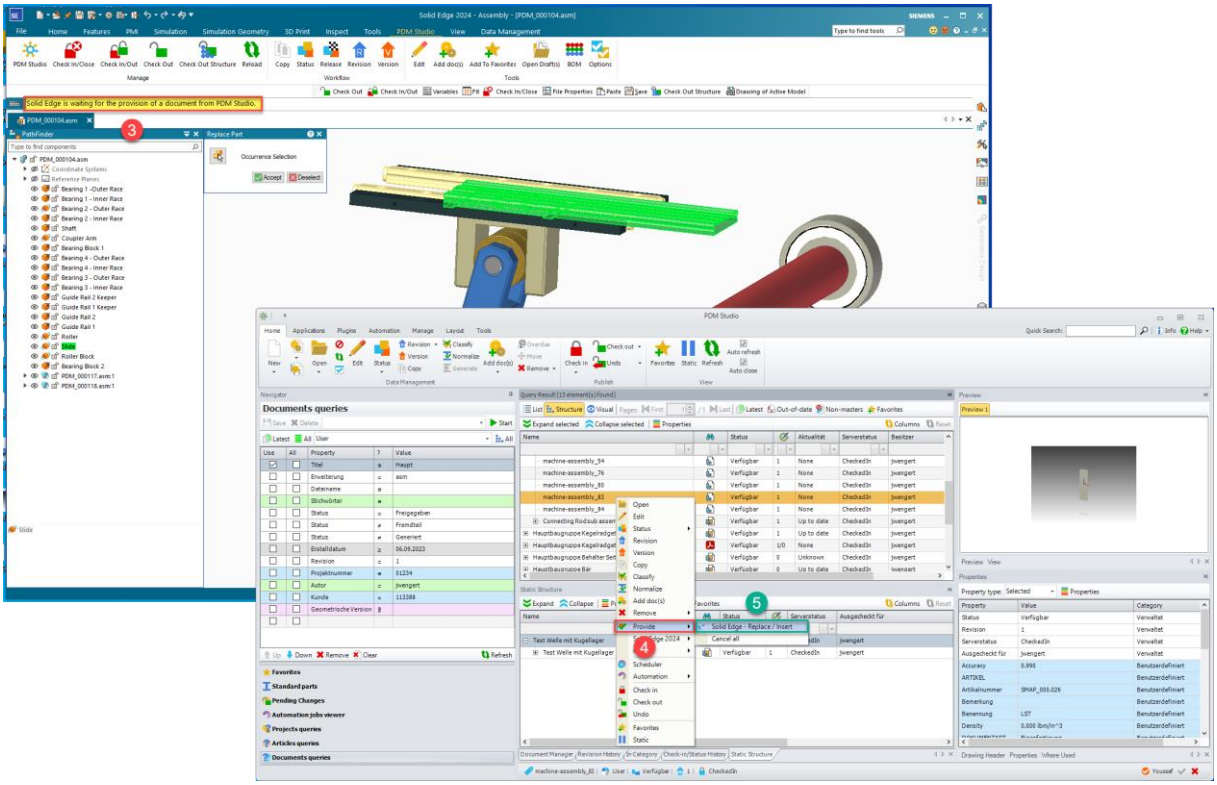
To make the process more transparent to the user as to what to do next, as of MP06 the Solid Edge /SOLIDWORKS status bar will inform the user when waiting for a document to be delivered from PDM Studio (i.e. a selection and the "Provide" command in PDM Studio).

Example:



In our example, a **part (1)** in Solid Edge is **replaced by a part from PDM Studio** and the **replacement is confirmed in Solid Edge (2)**.

Solid Edge/SOLIDWORKS is now waiting for the next step to complete the process.



From MP06, the message "**SolidEdge/SOLIDWORKS is waiting for the provision of a document PDM Studio" (3)** now appears in the respective status bar in Solid Edge/SOLIDWORKS.

This indicates to the user that in **PDM Studio** in the "**Provide" function (4)** the transfer command "**Solid Edge - Replace / Insert" (5)** of the document selected for replacement in PDM Studio is waiting to be executed in order to complete the process.

In our example, **switch to PDM Studio**, select the part to replace and click on the "**Provide" (4)** > "**Solid Edge - Replace / Insert" (5)** button.

Other (Technotes)

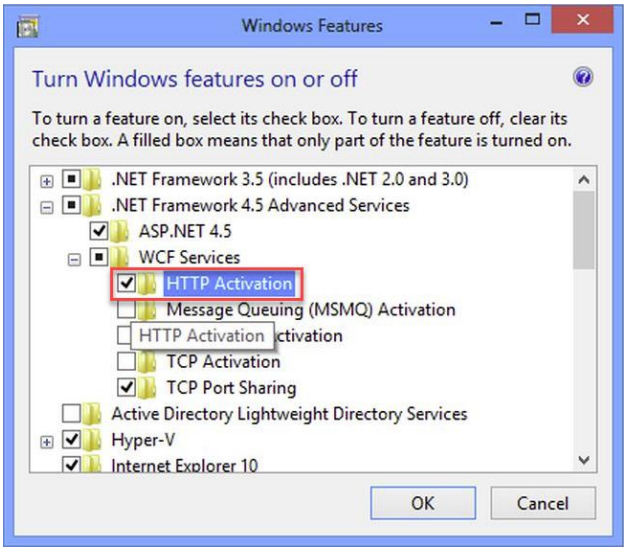
General

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:



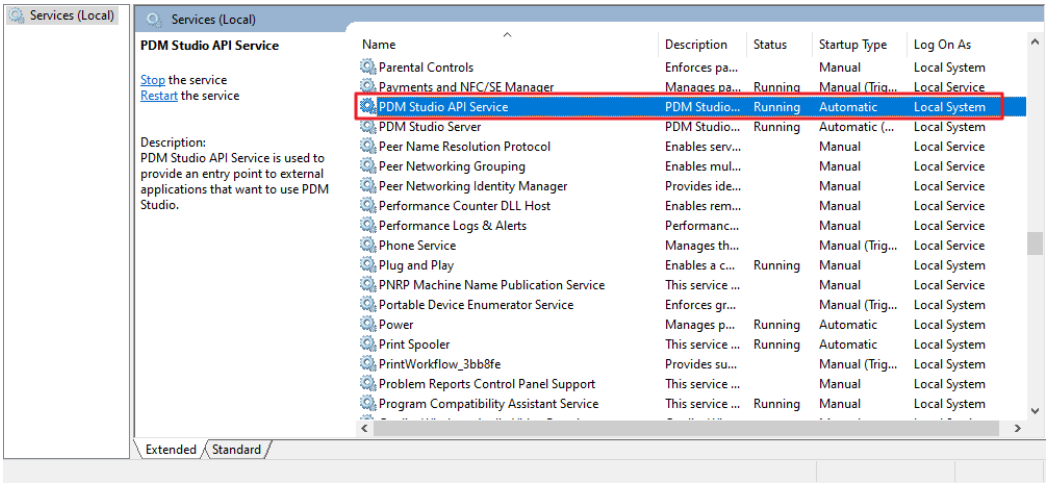
If the **Microsoft .NET Framework 4.8** is installed, go to the **Windows Features** in Windows Settings, and open the "**Turn Windows features on or off**" settings.

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

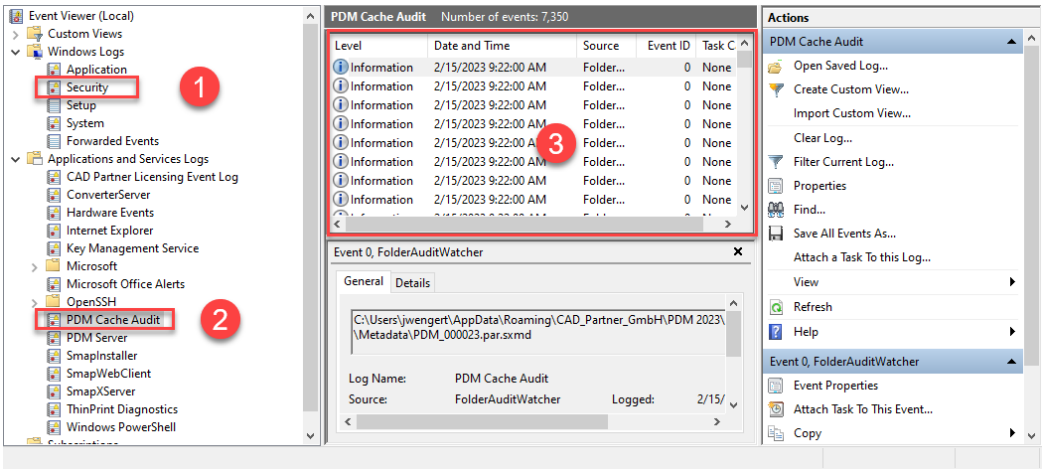
After that, all PDM application should work again without problems.

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.



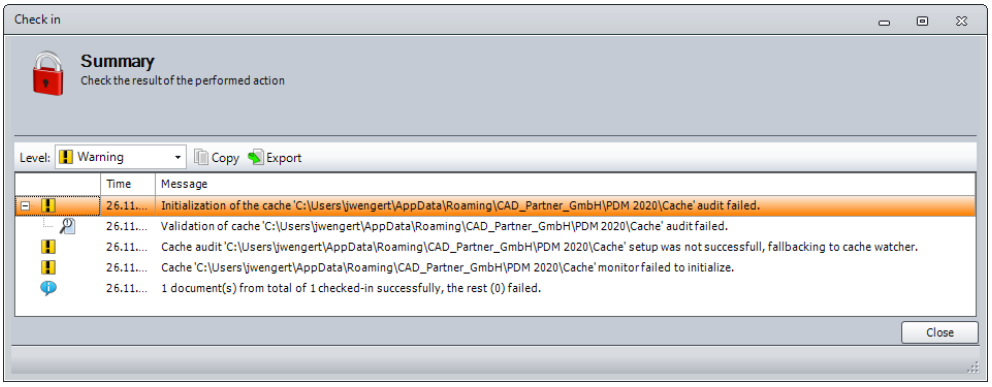
The most important point is that the PDM Studio API service **MUST** have access to the "**Security**" event log **(1)**.

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:



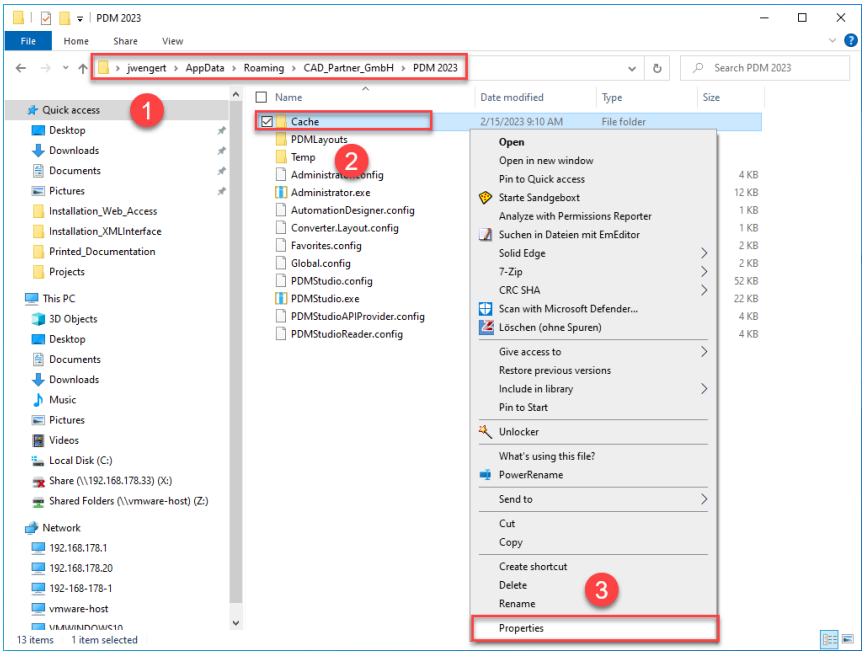
Important: This is because the company's security policy cannot be changed directly from the workstation, but is controlled globally by IT.

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.

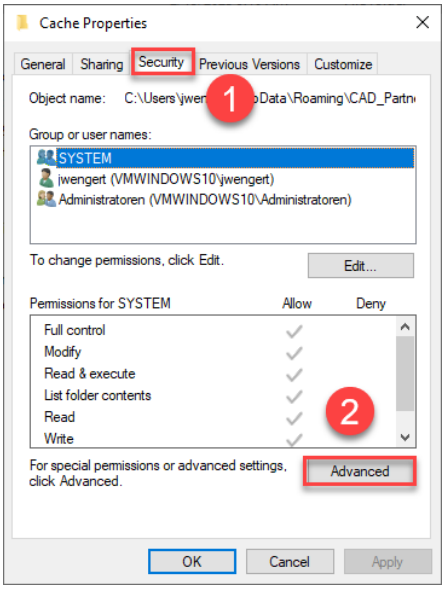
If this happens, check the following Windows settings.:

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

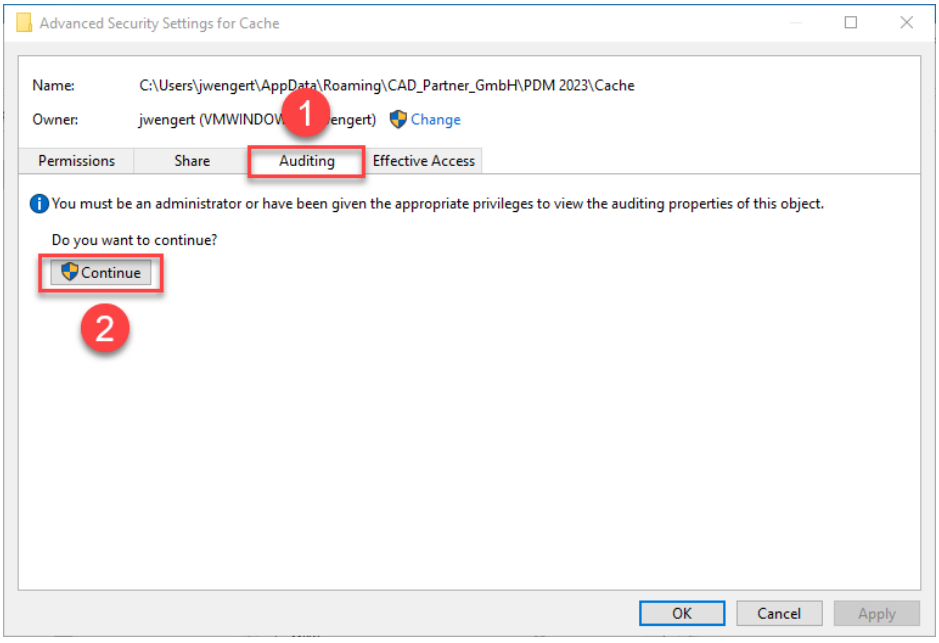
Usually: "**C:\Users\[User]\AppData\Roaming\CAD_Partner_GmbH\PDM 2023**"



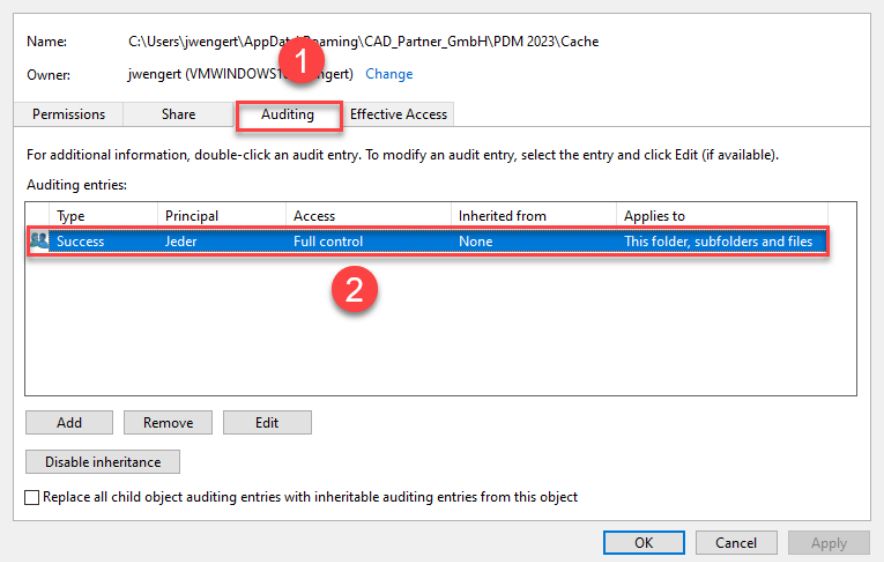
Right-click on the "**Cache**" folder **(2)** and select the "**Properties**" **(3)**.



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

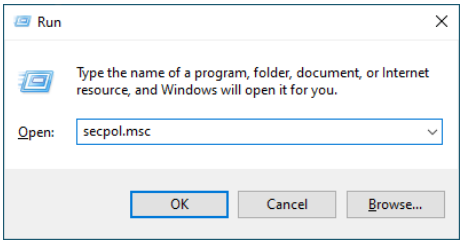


In the "**Advanced security settings**" of the cache directory, select the "**Auditing**" tab **(1)** and then click **Continue (2)**.



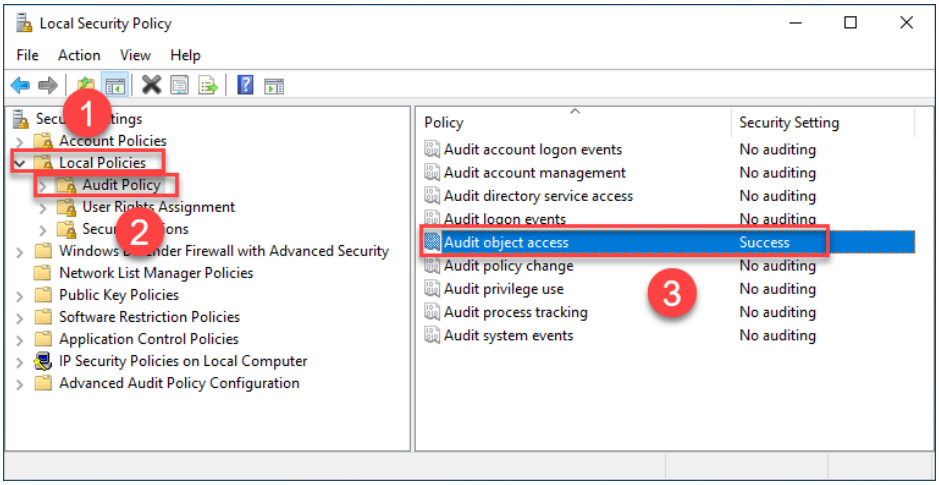
Go to the '"**Auditing" tab (1)**. In order to be able to monitor successful access to the cache folder and all its subfolders and files, "**Full control**" **(2)** over this folder and all its subfolders and files **MUST** be configured for everyone without any restrictions. If this is the case, then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

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

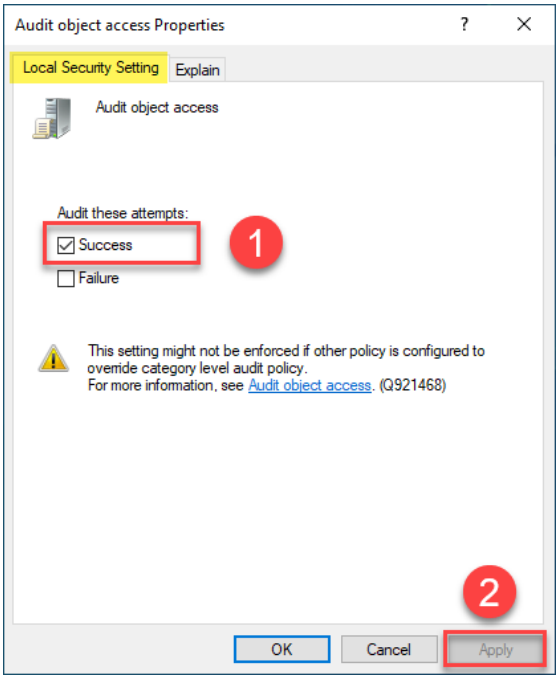


Then enter the command "**secpol.msc**". The **Local Security Policy** will be started.

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.

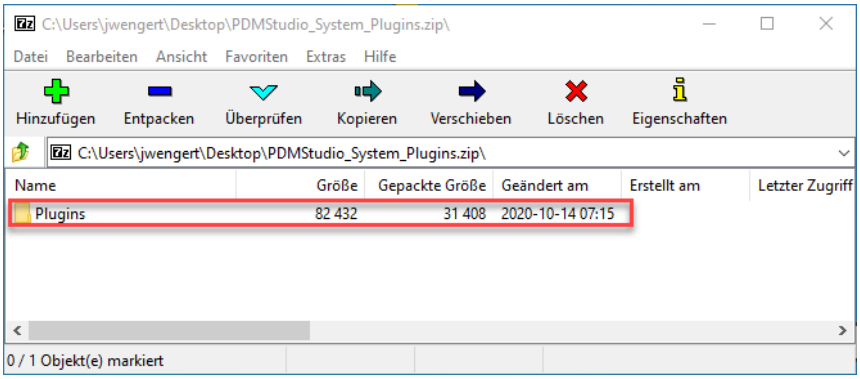
For more information on installing the Free- and Freeconverter plug-ins, refer to the Installation Plug-ins chapter in the "**PDMStudio_Installation_2023_EN.pdf**" document.

Add - Add-On Tools

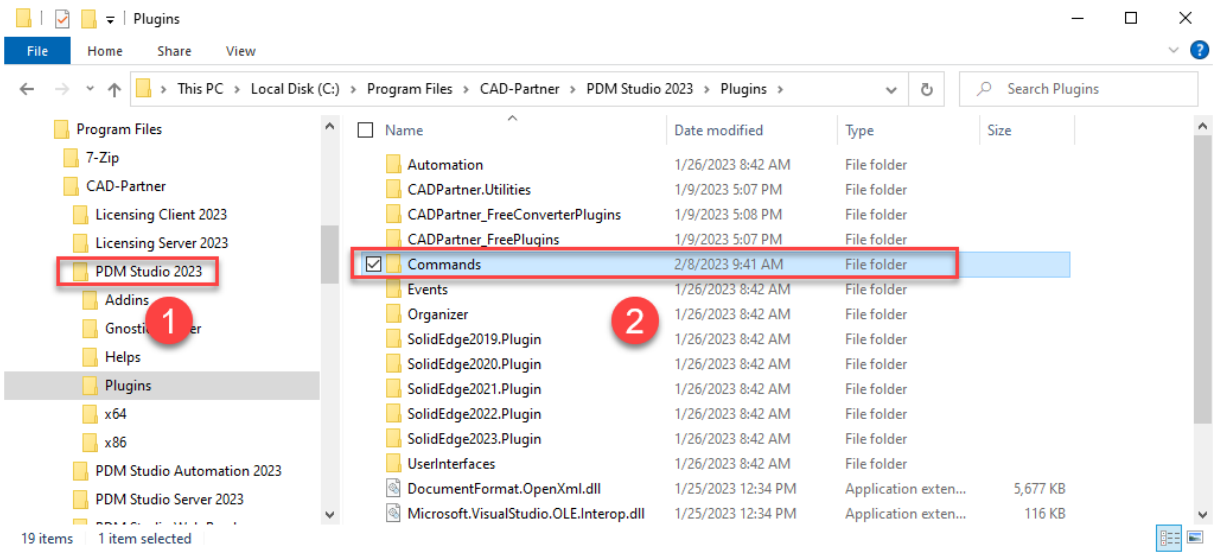
The "**Unmanaged Export**" function is not included in the installation package of the standard software and must be installed separately after installing the 2023 version.

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**".

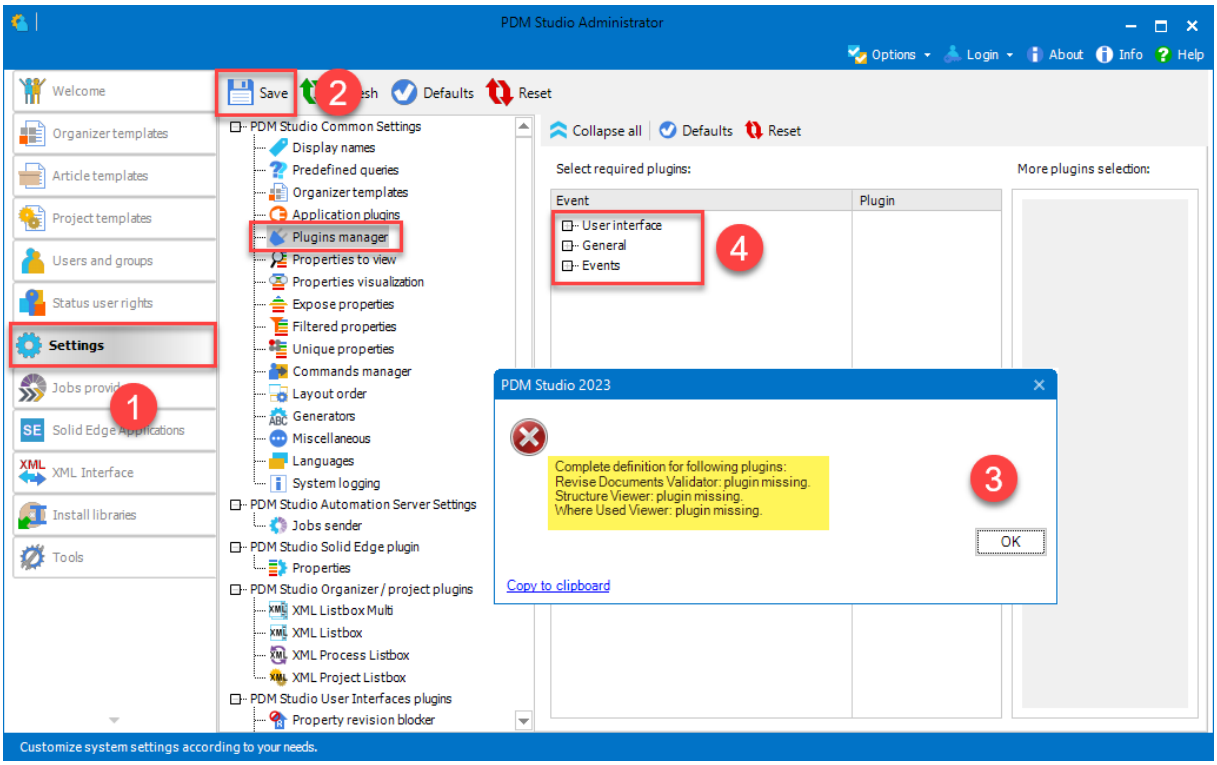
Note: The "SmapX.Client.Tools.dll" contains functions specific to your company's PDM Administrator. Therefore, it must be copied ONLY once to the PDM Administrator's computer. If you need to use these special functions - our support will inform you.

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

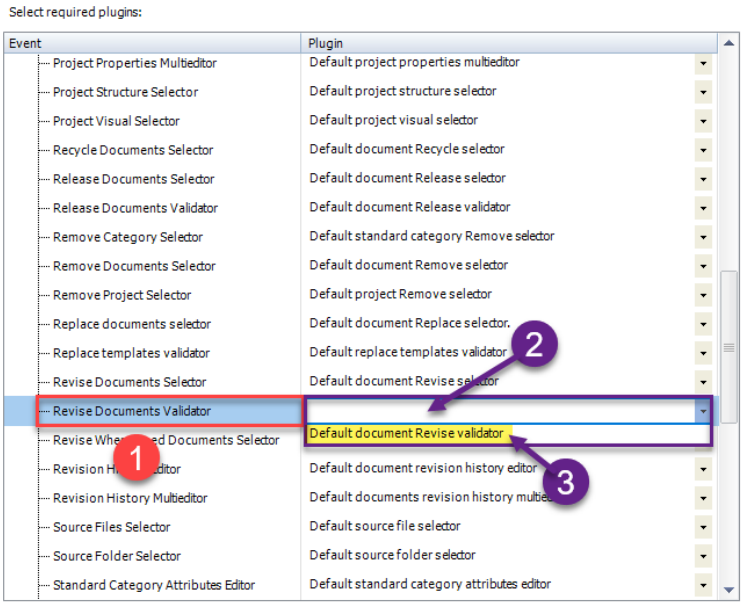
Each installation may also bring new settings to the Client Admin. You will need to manually configure these settings.

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.

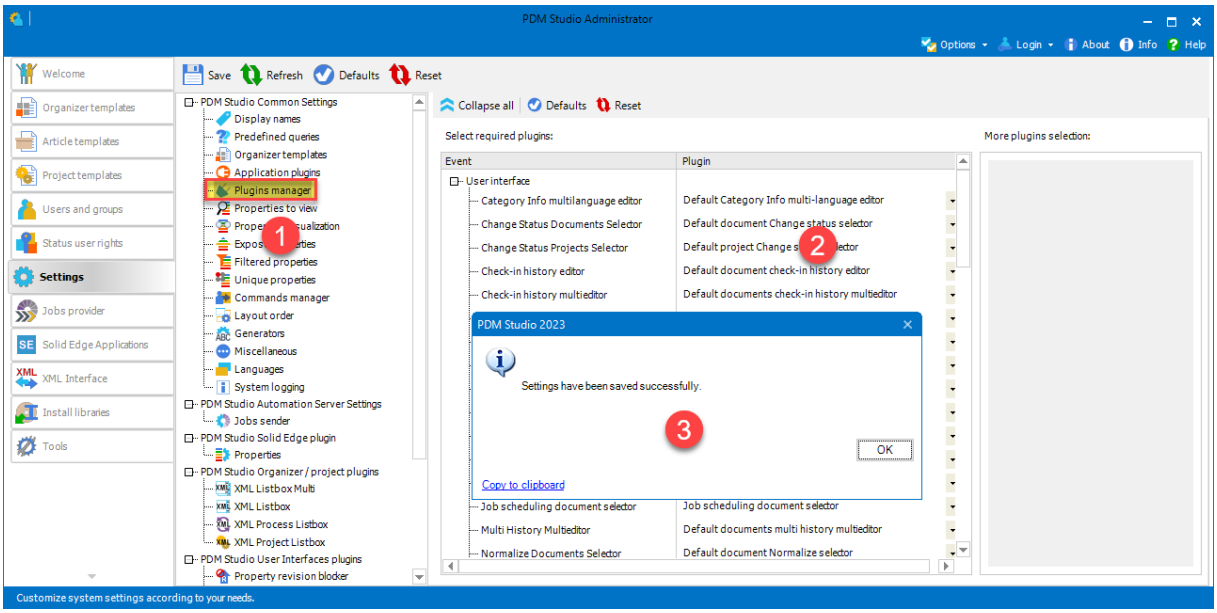
Expand the Event where the **Plugin is located**, in our example "**User interface**" and scroll down until you see the mentioned Plugins (**image above (3)**) "**Release Documents Validator**" (**image below (1)**).



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

Improvements:

Module	Description
Installation	Updated version of Licensing Client and Server to version 2024.
PDM Studio	Stored the log severity level option in the last wizards step Summary (default level is Warning).
PDM Studio	Improved PDM Studio Properties panel. Selected property type is kept after changing selection.
PDM Studio	Multiple selected mixed documents (standard parts and user documents) selected in standard parts can now be added to favorites
PDM Studio Server	Improved performance of restoring database (about 20%).
PDM Studio Server	Improved logging of database restore process.
SOLIDWORKS Plugin	Improved performance of writing links in import and copy process. Improvement depends on data structure (20 - 400%).

Changes:

Module	Description
PDM Studio	Changed behavior of selected documents counter in wizard selectors. New implementation counts only unique documents not all instances of document in the grid.
PDM Studio	Query Result panel settings has been separated by layout. It means that document, article and project panel are managed separately.
Solid Edge wrapper	Renamed PDM Studio Solid Edge wrapper log file from SESmap3DStandardPartsWrapper.sxlog to PDMStudioSEStandardPartsWrapper.sxlog.

Repaired Bugs:

Module	Description
Installation	Fixed XML Interface installation when configuration files have not been deleted from temporary folder created by previous installation.
Part Factory	Fixed creating a Part Factory table when there is extra standard property in data storage.
Part Keeper	Fixed an exception during loading generated standard parts to multieditor. It caused no document changes after saving documents in Part Keeper.
Part Keeper	Fixed an exception when exposing display name during Part Keeper processes.
Part Keeper	Fixed translation of Name column in multi-language Category info editor.
PDM Studio	Fixed turning Query Result to page 1 after sorting through specific column.

PDM Studio	Fixed stability of the standard categories visual navigation browser when selection of visual categories changes.
PDM Studio	Fixed quick search for Template, UIGuid and Filename properties.
PDM Studio	Fixed selection of issued documents in Release, Revise and Copy wizards validators steps. It selects all occurrences now instead only the first one in the past.
PDM Studio	Fixed the manage property Template visualization including setting values icons and displaying values in PDM Studio grids.
PDM Studio	Whenever out-of-date archive links of an assembly are detected, it is only possible to ignore this problem. Removed possibility resolving them because there are read-only.
PDM Studio	Fixed the production data check-out in Release Document wizard. It has wrongly checked-in already checked-out document before.
PDM Studio	Fixed storing the last set value of the Query result panel Last Revisions button state for documents, articles and projects separately.
PDM Studio	Fixed availability of Custom All option in Properties to View started from PDM Studio panels.
PDM Studio	Fixed the Release validator step of the Release Document wizard. There was regression from MP5 in detection of out-of-date non-master documents when also old versions were wrongly included.
Server Administrator	Fixed indicating of running PDM Studio server. It failed in special situations in the past and buttons for starting server do not have right state.
XML Interface	Fixed an exception during "write links" command in special situation when a document type was retrieving.

Imprint

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