

# PDM Studio

What's new 2023 |EN| MP 07

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# Table of contents

Table of contents	2
Introduction	4
Licensing 2023	4
Supported Operating Systems:	4
Update Licensing Version 2023	4
Installation	4
PDM Studio Server Administrator	5
Extension of the data storage check	5
PDM Studio Client Administrator	6
Validation rules	6
Added plausibility check as a new option in the Import document type by more paths preference	7
Configuring the panel hierarchy for the static structure window	8
How dependency structures are established	8
PDM Studio1	2
Added support for selecting revisions in the Structure and Where Used Panels for non-master documents.	
Icons introduced in the Where Used panel to indicate whether a document is assigned to a project/article or both	2
Example Project assignment:	2
Example Article assignment:	3
Example Article AND Project assignment:1	3
Example of different assignments to different revisions	4
New options in the first step "Document Selection" of the revision and update wizards1	5
Revision and Single revision1	5
Update and Update where used	7
Validation rules in the wizards in the Document validation step	7
Example of releasing documents without predefining the default settings in the Client Administrator1	8
Option 1 – Selective selection	8
Option 2 – Resolve all issues	9
Example of releasing documents with presetting's in the Client Administrator	1



Enhancement of the Copy Wizard	22
Merged options:	22
New Option:	23
Enhanced option in the Versioning Wizard for non-master documents	23
Panel hierarchy Static structure	24
Other (Technotes)	25
Command Plugin "SmapX.Command.Plugins.dll"	25
General	26
Message Cache monitoring could not be initialized	26
Disabling cache monitoring	31
Installation	32
Plugins in general	32
After Installation	32
General	32
Add - Add-On Tools	32
Client Tools	34
Setup Client Administrator	34
Other enhancements/improvements/changes/fixed bugs	36
Enhancements	36
Improvements:	36
Changes:	36
Repaired Bugs:	37
Imprint	39



#### Introduction

**PDM Studio 2023 MP07** is a maintenance release of PDM Studio. It contains 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 <u>Enhancements/Improvements/Changes/Fixed bugs</u> section.

*Note*: Please also read the document "*ReadmePDM2023MP07.txt*" in the "*Documents*\*EN*" directory of your MP07 installation files. This document lists the ticket numbers of the solved tickets in MP07.

For more information on how to install the V2023 MP07, 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 MP07.

#### Installation

Important: We strongly recommend that you check in all documents and clear the local cache on all clients before installing PDM Studio V2023 MP07.

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 Server Administrator

#### Extension of the data storage check

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The data storage integrity check (3) has been extended. It is now possible to check other data Storages (5) in addition to the current data Storage (4). It is now also possible to check for metadata duplicates (6).

Important: To check the current data storage (4), the PDM Studio Server (2) MUST be stopped. The current data storage can ONLY be checked if the PDM Studio Server is stopped.

A data store that is offline (4) can be checked during runtime. In this case, it is not necessary to stop the PDM Studio Server (2).



# PDM Studio Client Administrator

#### Validation rules

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MP07 introduced a new preference called **Validation rules (2)** in **settings (1)**. These allow **default settings (3)** to be defined in the Client Administrator for automatically resolving or ignoring any problems that may occur during document validation in the PDM Studio release, revision and copy wizards. In PDM Studio, these rules are then automatically applied to the wizards.

The columns available are:

- Validation rules Lists the possible issues depending on the individual processes that can occur with each wizard.
- **Resolve** Allows you to set resolvable issues to be automatically resolved when the wizard reaches the document validation step.
- Ignore Allows you to set ignorable issues to be automatically ignored.
- **Ignore why** When ignoring issues in the release Wizard, you must enter a reason in this column. The reason is then stored as the value of the "Ignored why" managed property.
- **Description** Displays a detailed explanation of each issue.

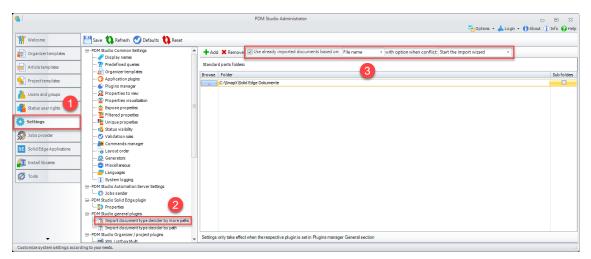
# Important: For documents in the structure where multiple problems are found at the same time, the default settings of PDM Studio's automation are currently not applicable. These problems MUST be solved one by one in the respective wizards in the "Document validation" step.

For more information, refer to the PDM Studio chapter <u>Validation rules in the wizards in the</u> <u>Document validation step</u>



### Added plausibility check as a new option in the Import document type by more paths preference

With MP07, the **Clever Import functionality (3)** has been integrated into the PDM Studio general plugins setting "**Import document type decider by more path**" (2).



This setting is like the "**Import document type decider by path**" setting but allows you to specify multiple paths for the standard parts folders.

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New in MP07 is the option "Use already imported documents based on ....". (3) to automatically detect (possibly) existing user documents/standard parts, and then select the filename or full path from the drop-down menu to define the criteria for evaluating documents/standard parts as already imported.

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If the User Document/Standard Part is recognized as already imported but matches more than one managed document, two further options in the next drop-down menu determine what happens next:

- 1. select "Start the Import Wizard" to start the Import Wizard.
- 2. select "**Try to use the highest revision**" and the highest revision of the User Document/Standard Part will be used (without starting the Import Wizard).

*Note*: *If (at least) two User Documents/Standard Parts with the same version are detected, the Import Wizard will be started regardless of the option selected.* 



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#### Configuring the panel hierarchy for the static structure window

In MP07 an additional option has been introduced in **Settings > Layout order (1)** to define a layout for the **Static Structure panel (3) as top level (2)** in addition to the layout starting with the Navigator panel as top level.

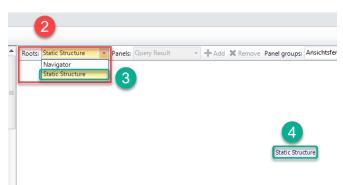
*General*: The Layout order setting is used to define the dependencies between the Navigator panel and the Static Structure panel (3) and the other windows in PDM Studio.

In this case, dependencies mean that a selection (e.g., a single document, several documents, a category, a project, etc.) spreads from one window to another.

The Navigator and the Static Structure window (as a parent node) are always displayed in the center of the structure. The selection is distributed from the center to the outer windows.

How dependency structures are established

• In the **Roots drop down list (2)**, select the root diagram to be configured, in our case **Static Structure (3)**.



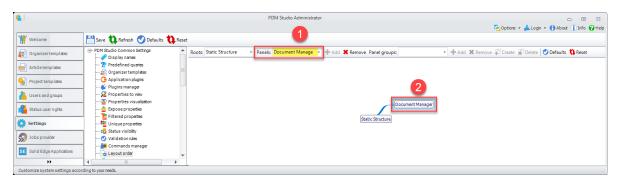
The **Static Structure layout (4)** is now displayed in the main window. It stands alone as no links to other windows or groups of windows have yet been defined. Select the **Static Structure layout (4)** by clicking on it.

To place the panel (2), selected in the panel selection list (1) - in our example the Document
 Manager panel - under an active window - in our example the static structure - select Add + (3).



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As a result, in our example, the **Document Manager panel (2)** is placed below the Static Structure panel.



As a result, the documents that are selected in the static structure will be inherited by the Document Manager panel and will be displayed in it.

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If I now select the **Document Manager panel (1)**, choose the Organizer panel from the drop-down menu and add it to the **structure (2)**, the Organizer panel is placed below the Document Manager panel (3) and then displays in PDM Studio the information that was transferred from the Document Manager panel for the document selected there.

• To create a group of panels, first place the desired panels (in our example, the Organizer and Properties panels) below **another panel** (in our example, the Document Manager panel) **(1)** in the same way as in the previous topic.



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Then select the panel, in our example the **Document Manager panel (2)**, from which the panels below it are to be grouped, but which is not itself part of the group, and enter a **group name (3)** in the Panel groups selection field (this field is both a selection list and an input field), and select **Create F** (4).

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In our example, a new group "**My Group**" (1) has been created from the Organizer and Properties panels. If you move the mouse over the new "My Group" panel, you will see a **tooltip showing the list of panels (2)** that are in this group.

*Note*: Panel groups can only be placed at the end of the structure, i.e., it is not possible to place a panel or panel group below a group.

*Note*: The Group Name is only visible in the Client Administrator.

**Note**: A Panel Group typically contains the Panels that are on the same level within the structure (e.g., the Panels associated with the Predefined Panel Group intended for Display, i.e., the Panels to be placed at the Bottom of the Structure).

• Clicking on the **Remove button X** (2) removes the **active panel** (1) (including all subordinate panels and panel groups) from the structure. A group can also be removed from the structure by



selecting the **group (5)** and clicking the **Remove button ×** (6). This only removes the group from the structure, but it remains as a group for further use.

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**Note**: If a group is selected in the Panel Groups (3), it can be deleted from the system using the **Delete button**  $\widehat{P}$  (4).

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*Note*: If the group is deleted, it disappears from the panel group (1) and is broken down into its individual panels.

For more information, see <u>Static Structure Panel Hierarchy</u> in the PDM Studio chapter.



### **PDM Studio**

Added support for selecting revisions in the Structure and Where Used Panels for non-master documents.

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Support for revision selection for non-master documents has been added to the **Structure (2) and Where Used (2)** panels. In the **drop-down menu (3)**, the existing revision can now also be selected for non-master documents.

# Icons introduced in the Where Used panel to indicate whether a document is assigned to a project/article or both

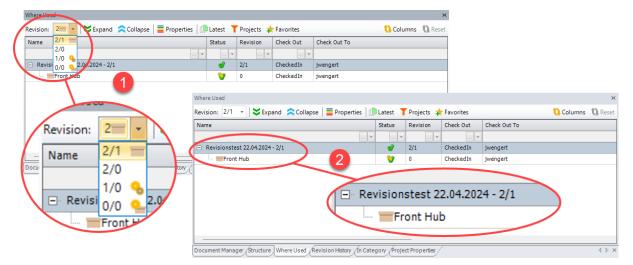
With MP07, icons have been added to the Where Used panel to better identify which documents are assigned to projects, articles, or both.

#### Example Project assignment:

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SE - CaseMachine		<b>V</b>	0	CheckedIn	smitsch		
Case Assy Machine - 0/0	2	1	0/0	CheckedIn	smitsch		
Case Assy Machine - 0/0			0/0	CheckedIn	smitsch		
E Case Assy Machine - 0/0				U.O.	smitsch		
Monitor and Stand - 0 Cas	e Assy	Machin	e - 0		wits ch		
	SE -	CaseM	achine	/	>		
Document Manager Structure Where Used Rev	vision History	In Category	Project Properties				∢ ⊳ ×



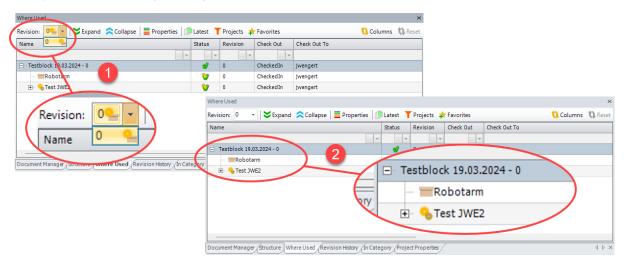
The document revisions embedded in projects are displayed as belonging to a project. The corresponding project is displayed in the **tree view (2)** after expanding the selection box and selecting the revision with the corresponding **Project icon** hext to the **revision number (1)**.



#### Example Article assignment:

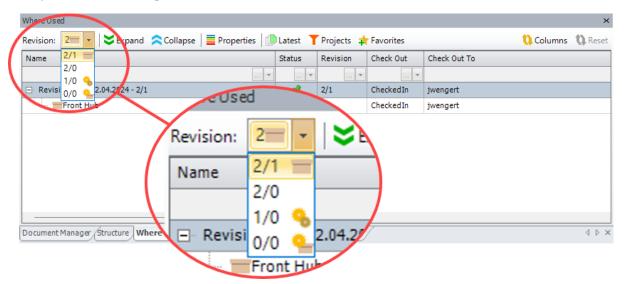
The document revisions embedded in articles are displayed as belonging to an article. The corresponding article is displayed in the **tree view (2)** after expanding the selection box and selecting the revision with the corresponding **Article icon** = next to the **revision number (1)**.

#### Example Article AND Project assignment:



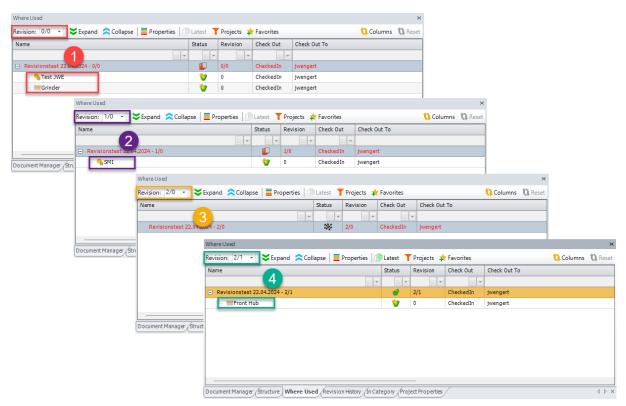
The document revisions embedded in **Projects AND Articles** are displayed as belonging to a project AND an article. The corresponding project AND article are displayed in the **tree view (2)** after expanding the selection box and selecting the revision with the corresponding **Project AND Article icon** Project to the **revision number (1)**.





#### Example of different assignments to different revisions

If different revisions are assigned to different projects and/or articles in the drop-down list, the icon behind the revision will indicate the assignment.



In our example, revision "0/0" is assigned to a project AND an article (1). Revision "1/0" is only assigned to a project (2), while revision "2/1" is only assigned to an article (4). Revision "2/0" has no association and is not associated with either a project or an article (3).



*  ∓					
Home	Applications	Plugins	Automation	Manage	Tools
P	🚯 📥	× 🥖		Revision 🔽 🥍 🗤 🛛 sif	y 🚊 🕼 Overdue
	-	th 🍆		Single revision	t the the test of tes
New	Open -	Edit	Status	Revise where used	Add doc(s) 🗙 Remove 🗸
			Dat 🕋	Update	
Navigator			7	Update where used	Result (8 element)
Docur	nents que	ries	_		Elist : Structure
E Save	🗙 Delete			-	Start Start

New options in the first step "Document Selection" of the revision and update wizards

New options have been introduced in the first step of the wizards for the "**Revision**", "**Single revision**" (1), "Update" and "Update where used" (2) functions.

#### **Revision and Single revision**

Fx	pand All 🔿 Collapse All   🚡 Select all	user children		t all 💌 📃 Properties		🐧 Reset   Selected: 2/
_	lame	Revision	Status	Check Out	Check Out To	Preview 1
	🔻	· •	· •	🔻		
E	Grinder1 Hauptbaugruppe - 0	0		CheckedIn	jwengert	
	···· <u>Grinder1 Hauptbaugruppe - 0/0</u>	0/0		CheckedIn	jwengert	
	Grinder1 Hauptbaugruppe - 0/1	0/1	*	CheckedIn	jwengert	
	··· case1 - 0	0	*	CheckedIn	jwengert	
	··· switch1 - 0	0	*	CheckedIn	jwengert	•
	🖶 head1 - 0	0	*	CheckedIn	jwengert	
	plate2 - 0	0	*	CheckedIn	jwengert	
	L	•	424	obala da	2	

#### There are now two new options:

1. Open root document and "Check-out" all revised ones

If the option "**Open root document and Check-out all revised ones**" (1) is checked, the root document will be opened as soon as the revision process is finished. If this option is enabled, the Check-out button is active and, when pressed, will check-out all revised documents once the revision process is complete.

**Note**: The Check-out button is a toggle that, when pressed, enables, or disables the Check-out feature. If the button is off, documents will not be checked out.

*Note*: *The Check-out button is off by default.* 



2. Replace revised documents in parent Documents, Articles, Projects, or Standard categories

The "Replace revised Documents in parent Documents, Articles, Projects or Standard categories" feature (2) allows you to replace the original revised documents with the newly created revisions in the following situations:

• Managed parent **Documents** - Applies only to documents whose parent documents are in the working status and not selected for revision.

#### Example:

Let us have the following structures of user documents:

- DocA RO (parent; Available status)
- Doc1 R0 (child; Released status)
- DocB RO (parent; Available status)
- Doc1 R0 (child; Released status)

Let us select DocA R0 and start the Revision command. The structure of DocA R0 is displayed in the Document Selection step, Doc1 R0 is selected for revising and the Replace copied documents in managed parents' option is on.

Finish the wizard so that Doc1 R1 is created as a new revision of Doc1 R0.

#### The result is as follows:

- DocA RO (parent; Available status)
- Doc1 R1 (child; Available status)
- DocB R0 (parent; Available status)
- Doc1 R0 (child; Released status)

In DocA RO the link (Doc1 RO) has been replaced with its revision (Doc1 R1). The structure of DocB RO has been kept untouched since DocB RO was not part of the revised structure (was not displayed in the Document Selection step of the Revise document wizard).

- Articles and Projects Updates documents embedded in articles or projects with their latest revision.
- **Standard categories** New document revisions will be classified in the same standard categories as the originals.

*Note*: The "*Documents*", "*Articles*", "*Projects*" and "Standard categories" buttons are switches which, when pressed, activate, or deactivate the functions.

*Note*: The buttons "*Documents*", "*Articles*", "*Projects*", "*Standard categories*" within the option are off by default.



# Update and Update where used

Jpdate document					_ = X
Document selection     Select the document(s) to be processe	d.				
🗲 Expand All 🔶 Collapse All 📔 Select all	Unselect	all   🧮 Proper	ties		🕻 Reset   Selected: 2/1
Name	Revision	Status	Check Out	Check Out To	Preview 1
*	*		💌		
head1 - 0	0	*	CheckedIn	jwengert	
✓ plate2 - 0	0	*	CheckedIn	jwengert	۵.
bearing1 - 0	0	*	CheckedIn	jwengert	
plate2 - 0	0	*	CheckedIn	jwengert	AT OL
	0	*	CheckedIn	jwengert	
washer1 - 0	0	*	CheckedIn	jwengert	
Replace updated documents in parent Articles,	Projeds or	Standard categ	ories 🔽 Set status Re	leased independetly on source one	
🚺 Info			_		< Back Next > Cancel
<u> </u>					
-					

In the first step of the wizards for the "Update" and "Update where used" functions, new options "Replace updated documents in the parent Articles, Projects or Standard categories" (1) have been added.

By activating the respective "Articles", "Projects" or "Standard categories" buttons within the option, you can selectively replace the original revisions of the updated documents in the respective groups (Articles, Projects, or Standard Categories) with the newly created revisions:

- Articles and Projects Documents embedded in articles or projects will be replaced with their newly created revision.
- **Standard categories** New revisions of documents placed in standard categories will be placed in the same categories as well.

*Note*: The "*Articles*", "*Projects*" and "*Standard categories*" buttons are switches which, when pressed, activate, or deactivate the functions.

*Note*: The *"Articles, Projects, Standard categories"* buttons within the option *are switched off by default*.

Validation rules in the wizards in the Document validation step

With MP07 - as described in the <u>Validation rules</u> section of the Client Administrator chapter - the ability to define default settings for problems that occur has been added.

This allows problems in the Document validation step of the Copy, Release, and Revise document wizards to be automatically resolved or ignored without further user intervention.

Important: Some conflicts cannot be resolved, only ignored. If there are only conflicts that can only be ignored, the "Resolve" button will remain inactive even after the "Issues" function is clicked, since there are no problems that can be resolved automatically.

The list of conflict types and whether they can be resolved or ignored varies from feature to feature. Please refer to the chapters "Document Status", "Document Revision", "Revise Where Used Documents", "Update Documents" and "Update Where Used Documents" in the PDM Studio Help for the corresponding restrictions.



Example of releasing documents without predefining the default settings in the Client Administrator

The following procedure applies from MP07 onwards.

Release document (Released)			_	۰	23
Check the validation results and try to res	olve any found problems.				
🗢 Previous Next 🔿 🕹 Issues 🖓 Resolve 🚽 Ic	gnore note: 🗢 Ignore 👻 🔃 Reset 🛊 Fav	orites			
Name	Validationresult	Ignore why			
🔻	💌				🔻
Hauptbaugruppr Valve_Cam_RESULTS - 0	Document contains out of date Organizer template Status of the document is unknown and might be out date				
	Ready				Ê
shaft_mount - 0	Document contains out of date Organizer template				
rocker_shaft - 0	Document contains out of date Organizer template	3			
valve_guide - 0	Out of date document				
rocker - 0	Document contains out of date Organizer template				
camshaft - 0	Document contains out of date Organizer template				
valve - 0	Document contains out of date Organizer template				
1 Info		< Back Ne	xt >	Can	icel

In the "Document validation" step, the identified problems are displayed first as before (3).

Only the "Issues" button and the "Ignore note" edit box are active. The "Resolve" button (1) and the "Ignore" drop-down menu (2) are initially grayed out.

There are two ways to activate the "Resolve" and "Ignore" functions.

Option	1-	Selective	selection
--------	----	-----------	-----------

Release document (Released)					
Check the validation re	dation esults and try to resolve any found problems	Ъ.			
🗢 Previous Next 🔿 😽 Issue	es 🛹 Resolve 🝷 Ignore note: 🔤 👘	😑 Ignore 👻 🔃 Reset   🍁 Favo	rites		
Name	Resolve selected		Ignore why		
	🗸 Out of date Organizer template			💌	
⊟- Hauptbaugruppr Valve_Cam_	RESULTS - 0 Document contains or Status of the docume	ut of date Organizer template nt is unknown and might be out date			
Hauptbaugruppr Valve Ca	am RESULTS - 0/0 Ready				
shaft_mount - 0		ut of date Organizer template			
rocker_shaft - 0		ut of date Organizer template			
valve_guide - 0	Out of date document				
rocker - 0		ut of date Organizer template			
camshaft - 0 valve - 0	Release document (Releas				
(i) Info		It validation Jation results and try to resolve any found problems			
	🔶 Previous Next 🔿	Issues Resolve Vignore note:	😑 Ignore 👻 🚺 Reset 🗄	🛊 Favorites	
	Name	Resolve selected		Ignore why	
		Out of date Organizer template			
	🖃 Hauptbaugruppr Valv	e_Cam_R 🛃 Possibly out of date document	date Organizer template unknown and might be out date	2	
	- Hauptbaugruppr V	alve Cam RESULTS - 0/0 Ready			
	shaft_mount - 0	Document contains ou	it of date Organizer template		
	<ul> <li>rocker_shaft - 0</li> </ul>		it of date Organizer template	3	
	valve_guide - 0	Out of date document		-	
	rocker - 0		it of date Organizer template		
	- camshaft - 0		it of date Organizer template it of date Organizer template		
	valve - 0	Document contains of	it of date organizer template		
	(i) Info				< Back Next > Cancel

Selecting one (1) or several (2,3) issues from the list activates the "Resolve" button (4,5).



Clicking on the "**Resolve**" function opens a selection box. This shows the problems with the selected documents.

You can now either **resolve the problem by selecting it from the list** one at a time or resolve all problems at once with **"Resolve selected**".

#### Option 2 – Resolve all issues

Release document (Released)						•	23
Document validation Check the validation results and try to res	olve any found problems.	🐧 Reset 📑 Favo	niter				
Name	Validationresult		Ignore why				
🔻		💌					👻
Hauptbaugruppr Valve_Cam_RESULTS - 0	Document contains out of date Organizer template Status of the document is unknown and might be o						
	Ready_						Ē
shaft_mount - 0	Document contains out of date Organizer template						
rocker_shaft - 0	Document contains out of date Organizer template						
valve_guide - 0	Out of date document	2					
rocker - 0	Document contains out of date Organizer template						
camshaft - 0	Document contains out of date Organizer template						
valve - 0	Document contains out of date Organizer template						
1 Info				< Back	Next >	C	ancel

To select all issues, click the "Issues" button (1), which will highlight all issues (2). The "Resolve" button (3) and the "Ignore" drop-down menu (4) will then be active.

Release document (Released)				_		83
Check the validation results and try to res	live any found problems.					
🗢 Previous Next 🖚 😽 Issues 🛹 Resolve 🗖 Ig	nore note: 📃 🤤 Ignore 🔻 🐧 Reset   🚖 Favo	rites				
Name Resolve sel	ected	Ignore why				
Out of date	Organizer template					💌
😑 Hauptbaugruppr Valve_Cam_F 🝼 Possibly ou	t of date document date organizer template unknown and might be out date					
	Ready					E
- shaft_mount - 0	Document contains out of date Organizer template					
rocker_shaft - 0	Document contains out of date Organizer template					4
- valve_guide - 0	Out of date document					
rocker - 0	Document contains out of date Organizer template					
- camshaft - 0	Document contains out of date Organizer template					
valve - 0	Document contains out of date Organizer template					
1 Info			< Back	Next >	Can	icel
						:

Click on the "Resolve" button (1) to open the selection box listing the problems found (2).

You now have the option to **resolve all selected problems at once** using the "**Resolve selected**" function, or to resolve the listed problems one at a time by clicking on each problem entry. This allows you to solve individual problems and ignore others if you do not want to solve them.



Important: If, as in our example, there are combination problems (the component built into the assembly is a "Possibly out of date document" AND contains "Archive document with possibly out of date links"), the solvable problems will be solved automatically, and the others must be "Ignored" and then appear in the "Ignore" drop-down list.

Release document (Released)					c	-	۰	23
Check the validation results and try to res	olve any found problems.		1					
🗢 Previous Next 🔿 🛛 🦊 Issues 🛹 Resolve 👻 Ig	nore note: To Ignore		gnore 🝷 🔃 Reset   🍁 Favorites					
Name  Hauptbaugruppr Valve_Cam_RESULTS - 0  Hauptbaugruppr Valve Cam_RESULTS - 0/0  shaft_mount - 0	Validationresult Document contains out of date Orga Status of the document is unknown Ready Document contains out of date Orga	•	Ignore selected Out of date Organizer template Possibly out of date document Archive document with possibly out-of-date links Ignore all				[	
rocker_shaft - 0	Document contains out of date Orga		template					
rocker - 0 camshaft - 0	Document contains out of date Orga Document contains out of date Orga		· ·					
valve - 0	Document contains out of date Orga	nizer	template					
() Info				< Back	Next >		Car	icel

Problems that need to be ignored, that you choose to ignore, or that contain a combination of problems are displayed by clicking the "**Ignore**" button **(1)**.

# Important: A list of the problems found will be displayed (2). For each problem to be ignored, an *"Ignore note"* text (3) MUST be entered.

In our example, the problem "Archive documents with possibly out of date links" cannot be fixed but must be ignored and appears in the "Ignore" list after the solvable problem "Possibly out of date document" in the document has been fixed.

Important: If the result of the document check contains only documents whose problems CANNOT BE RESOLVED, the "Resolve" function remains grayed out after selecting the "Issues" function. In this case, only the "Ignore notes" input field and the "Ignore" button are active.



# Example of releasing documents with presetting's in the Client Administrator

If the validation rules are predefined in the Client Administrator, these default settings are automatically applied in the wizards in the "Document validation" step.

Release document (Released)					۰	83			
Document validation Check the validation results and try to resolve any found problems.									
← Previous Next →   🖑 Issues 🛷 Resolve 👻  Ig	inore note: 🔅 💭 Ignore 🔻	🔨 🔃 Reset   🖈 Favorites							
Name	Validationresult	Ignore why							
💌	🔻								
Hauptbaugruppr Valve_Cam_RESULTS - 0	Out of date Organizer template will be resolved Possibly out of date document has been resolved								
	Ready								
shaft_mount - 0	Out of date Organizer template will be resolved								
rocker_shaft - 0	Out of date Organizer template will be resolved					4			
valve_guide - 0	Out of date document								
rocker - 0	Out of date Organizer template will be resolved								
camshaft - 0	Out of date Organizer template will be resolved								
valve - 0	Out of date Organizer template will be resolved								
( <sup>1</sup> / <sub>1</sub> Info		[	< Back Next >		Can	icel			

Issues that cannot be resolved are displayed in red. Problems with Out of date documents cannot be resolved in the Release Wizard. They can only be ignored. However, there are two issues with this document. Firstly, the document contains an Out of date Organizer template, this conflict has been resolved, and secondly, the document is Out of date. This cannot be resolved but must be ignored as mentioned above.

The "Resolve" and "Ignore" functions are initially disabled.

Release document (Released)				_	۰	23
Check the validation results and try to res	olve any found problems.					
🗢 Previous Next 🔷   🖑 Issues 🛷 Resolve 👻 Ig	nore note: Gignore	🖞 Reset   🍁 Favorites				
Name	Validationresult	Ignore why				
🔻	🔻					💌
Hauptbaugruppr Valve_Cam_RESULTS - 0	Out of date Organizer template will be resolved Possibly out of date document has been resolved					
Hauptbaugruppr Valve Cam RESULTS - 0/0	Ready					
shaft_mount - 0	Out of date Organizer template will be resolved					
rocker_shaft - 0	Out of date Organizer template will be resolved					4
···· valve_guide - 0	Out of date document 3					
···· rocker - 0	Out of date Organizer template win de resolved					
camshaft - 0	Out of date Organizer template will be resolved					
valve - 0	Out of date Organizer template will be resolved		1			
Info     Some issues are not treated			< Back Next	>	Car	ncel

When you click "Next >" (1), an error message (2) is displayed for the document (3) and the wizard cannot proceed until all conflicts are resolved.



Check the validation results an	d try to resolve any found problems.							
🗕 Previous Next 🔿 🕹 Issues 🗸 Re	solve 🔻 Ignore note: To be Ignored	🗧 Ignore 🔻 🔃 Reset   🛊 Favorites						
lame	Validationresult	Ignore selected						
	🔻	Archive document with possibly out-of-da	ite links 3					
Hauptbaugruppr Valve_Cam_RESULTS	S - 0 Out of date Organizer temp Possibly out of date docum	late will S Ignore all						
Hauptbaugruppr Valve Cam RESL	JLTS - 0/0 Ready							
shaft_mount - 0	Out of date Organizer temp	ate will be resolved						
rocker_shaft - 0	Out of date Organizer temp	Out of date Organizer template will be resolved						
valve_guide - 0	Out of date document							
rocker - 0	Out of date Organizer temp	late will be resolved						
camshaft - 0	Out of date Organizer temp	ate will be resolved						
valve - 0	Out of date Organizer temp	ate will be resolved						
		· · · · · · · · · · · · · · · · · · ·						
( Info			< Back Next > Cancel					

Click the "Issues" button (1) or select the item from the list (2). The "Ignore" function is now active and the reason for the issue (highlighted in yellow) (3) is displayed in the list. In this case, the reason for ignoring must be entered in the "Ignore note" field (4).

Once all issues are resolved, you can proceed with the wizard.

#### Enhancement of the Copy Wizard

In MP07, the options for the first step of the Copy Wizard have been changed and a new option has been added.

Сору	document							۰	23
	Select the document(s) to be processed.	. =							
Ě	Expand All 🔶 Collapse All   🚡 Select all user chil						🔃 Reset	Selected: 4	4/8
	Name	Status	Revision	Check Out	Check Out To		Preview 1		_
	🔻	🔻	🔻	🔻		💌			
	Hauptbaugruppr Valve_Cam_RESULTS - 0	1	0	CheckedIn	jwengert				
	Hauptbaugruppr Valve Cam RESULTS - 0/0	1	0/0	CheckedIn	jwengert			19P	
	shaft_mount - 0	1	0	CheckedIn	jwengert			~	
	rocker_shaft - 0	1	0	CheckedIn	jwengert				
	valve_guide - 0	*	0	CheckedIn	jwengert				
1	rocker - 0	1	0	CheckedIn	jwengert 3				
<u>.</u>	🦯 camshaft - 0	1	0	CheckedIn	jwengert				
	Open root document and Check-out all copied ones	Replace	copied docun	nents in manage	d parents Copy from latest revision Add to activ	e project/artic	e/folder	Cance	el
	2					. Such		Conce	

#### Merged options:

The previous options "Open root document" and "Check-out all copied documents" have been merged into the new option "Open root document and "Check-out" all copied ones" (1).



Select the "Open root document and "Check-out" all copied ones" checkbox (1) to open the root document when the copy operation is complete. This activates the "Check-out" button (2), which is used to check out all copied documents when the copying process is complete. The "Check-out" button (2) is a switch that activates the checkout function when activated. If the button is not activated, the copied documents will not be checked out.

**Example**: When an assembly and some of its components are copied and this option is enabled, the assembly is opened when the process is finished. Optionally, the copied components can be "**Checked out**" after the process is complete.

*Note*: The *"Check-out"* switch is enabled by default when using this option.

#### New Option:

A new option "**Copy from last revision**" (3) has been implemented. If the selection contains out of date documents and these are selected, the latest revisions will be copied instead of the existing revisions when the "**Copy from last revision**" option (3) is enabled.

Incr	ease version						_	۰	83
	Document selecti Select the document for in		on.						
	Properties					() Res	et   Se	lected:	1/1
	Name	Revision	Status	Check Out	Check Out To	Preview 1			
			🔻	🔻					
	Grinder1 Hauptbaugruppe - 0/1	0/1	**	CheckedIn	jwengert	>			
	1	6	A	0	)e				
V	Open new version of non-master d	locument(s) ar	d Check o	ut them all					
	🚺 Info				< Back	Next >		Canc	el

#### Enhanced option in the Versioning Wizard for non-master documents

With MP07, the previous option "**Open a new version of a non-master document**" in the first step (Document Selection) of the Versioning Wizard has been replaced by the new option "**Open new version of non-master document(s) and "Check out**" them all" (1).

Enable the option "Open new version of non-master document(s) and "Check out" them all" (1) to open the newly created version when the versioning process is finished.

When this option is enabled, the "Check out" button (2) also becomes available. If the "Check-out" button is enabled, all versioned documents will be checked out when the process is complete. If the button is disabled, the versioned documents will not be checked out.

*Note*: The *"Check-out"* switch is enabled by default when using this option.



# Panel hierarchy Static structure

As already described in the chapter Client Administrator, it is now also possible to set up a panel hierarchy in the Static Structure window, where the documents selected in the Static Structure window are inherited by the subordinated panels defined in the Client Administrator.

* =	PDM Studio		
Home Applications Plugins Automation Manage Layout To	ds	Qu	aick Search: valve 🔎 🔍 Info 🚱 Help +
🕞 🚱 ⊨ 🖌 🥒 📲 🏦 Revision + 🐱 Classify	🛕 🖗 Overdue 🛛 🔒 🍗 Check out + 🔶 🔢 🏠 💷		
tersion Version Version	+ Move		
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Data Management	Publish View		
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Extension = dft	valve - 0 🕒 🔮 0 19.08.2021 CheckedIn jwengert		KEP Junit
Status = Released	Hauptbaugruppr Valve_Cam_RESULTS - 0/0     August 2000 0/0 20.11.2024     CheckedIn jwengert		
CreateDate = 22.03.2024	Hauptbaugruppe Kegelradgetriebe- 0     S     0     23.02.2019     CheckedIn     jwengert		
Revision = 0	🕀 Hauptbaugruppe Caldatrac- 0 🔄 🔮 0 30.01.2024 CheckedIn jwengert	Drawing Header	×
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	- Kegelradgehaeuse - 0 0 CheckedIn jwengert	6 Material	
	Radial WDR 45x62x8 - 0 0 CheckedIn jwengert	7 CreateUser jwe	engert
	Abtrieb_rechts - 0     O     CheckedIn jwengert	Properties	×
	Document Manager 2	Property type: All	<ul> <li>Properties</li> </ul>
	1. Structure ** Where Used d Revision History + Back + Forward	Property	Value
🕆 Up 🖡 Down 💥 Remove 🌂 Clear 🚺 Refresh	Revision: 0 - SExpand Collarse Properties Latest TProjects + Favorites	Author	DiplIng. Arne Peters
+ Favorites		Category	
Standard parts	Name Statu Revision Check Out Check Out To	Comments	Mit freundlicher Genehmigung von ZAE-Antri
		Company	Beratung, Schulung, Systementwicklung
Pending Changes	Hauptbaugruppe Kegeiradgetri. 2 0 CheckedIn jwengert	Keywords	
Automation jobs viewer		Manager	Peters
Projects queries		Subject	Solid Edge Insight
Articles queries	- Radiai WDK 15x62x8 - 0	Title	Kegelradgehäuse
? Documents queries	Document Manager Structure Where Used mervision History In Category Project Properties 4 b >		
	🥜 Kegelradgehaeuse - 0   🐴 User   🏣 Available   🏦 0   🔒 CheckedIn		🔿 LST Test 🐭 🗶
			· · · · · · · · · · · · · · · · · · ·

In our example, the assembly has been loaded and selected in the Static Structure panel (1).

Once the assembly is selected, it is transferred to the Document Manager panel (2).

Now, when you select a document from the assembly in the **Document Manager panel (3)**, the document information is transferred to the **Drawing Header (4)** and **Properties (5) panels**, and the information from the document is displayed there.



# Other (Technotes)

#### 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".

¥  =			_			PD	M Studio							- # X
Home	Appli	ications Plugins	1	tion Manage Layout Tools									Quick Search:	🔎   🚺 Info 🕜 Help
Links do	e wnloade ad	open with FreePlugins	Ī											
lavig				4	Query Result (5 element(s) found)						×	Preview		1
Docur	nent	s queries			Elist . Structure Visual Pages: M First 1	÷ /1 ▶	Last Datest	<u>&amp;</u> ou	t-of-date 👰 No	on-masters 🏼 🛊 F	avorites	Preview 1		
Save [	X De	lete		👻 🕨 Start	Sexpand selected Collapse selected	5					0 Columns 0 Reset			
Lates		ul User		- 1. All			Status	0	Aktualität	Serverstatus	Besitzer	1		
	All	Property	2	Value										
Use		Titel	-	Kegelradgetriebe	Hauptbaugruppe Kegelradgetriebe	6	Verfügbar	1	Up to date	CheckedIn	jwengert		-fi-	
		Erweiterung		asm	⊕ Hauptbaugruppe Kegelradgetriebe		Verfügbar	1/0	None	CheckedIn	jwengert			
	<u> </u>	Dateiname	-	a series and a series of the s		Æ	Verfügbar	1/0	Up to date	CheckedIn	jwengert			
п	П	Stichwörter	2				) Verfügbar	0	Up to date	CheckedIn	jwengert			
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		Erstelldatum	2	06.09.2023										
		Revision	=	1								Preview View		4 ⊳.
		Projektnummer		01234	<						>	Properties		
		Autor	=	jwengert	Document Manager						×	Property type: Se	elected • = Properties	
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A		m 💥 Remove 🇱 O		C Refresh			• •			-		Serverstatus Ausgecheckt für	jwengert	Verwaltet
T Up		in 😹 Kemove 🖲 🕻	ear	G Refresh	Hauptbaugruppe Kegelradgetriebe		Verfügbar	1	CheckedIn	jwengert		ApprovedDate	Jwenger	Benutzerdefiniert
🛨 Favo	rites				Hauptbaugruppe Kegelradgetriebe	- 2	Verfügbar	1/0	CheckedIn	iwengert		ApprovedUser		Benutzerdefiniert
T Stan	dard pa	arts			Zeichnung Kegelradgetriebe	-	<u>Verfügbar</u>	1/0	CheckedIn	<u>twengert</u>		CreateDate	12.11.2014	Benutzerdefiniert
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- Auto	mation	i jobs viewer			Verschlubschräube DIN 908 - M 20 x 1,5     Kegelradgehäuse		Generiert	10.00	CheckedIn CheckedIn	jwengert		Doc ID	PDM_000069	Benutzerdefiniert
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C Docu	ments	queries			Check-in	otatus Hi	story Static Struc	une			d b x	Urawing Meader	Properties Where Used	4.5
					🥜 Hauptbaugruppe Kegelradgebiebe   🐴 User   🛌 Verfi	igbar   🕇	1   🤮 Checker	din 🛛						💙 Youssef 🐭

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.



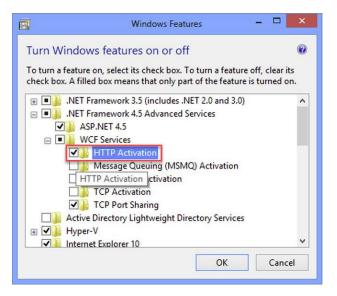
#### General

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 applications 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).



PDM Studio API Service	Name	Description	Status	Startup Type	Log On As
	Parental Controls	Enforces pa		Manual	Local System
Stop the service	Revenue and NFC/SE Manager	Manages pa	Running	Manual (Trig	Local Service
Restart the service	PDM Studio API Service	PDM Studio	Running	Automatic	Local System
	PDM Studio Server	PDM Studio	Running	Automatic (	Local System
Description:	Peer Name Resolution Protocol	Enables serv		Manual	Local Service
PDM Studio API Service is used to provide an entry point to external	🤹 Peer Networking Grouping	Enables mul		Manual	Local Service
applications that want to use PDM	🌼 Peer Networking Identity Manager	Provides ide		Manual	Local Service
Studio.	🌼 Performance Counter DLL Host	Enables rem		Manual	Local Service
	🧠 Performance Logs & Alerts	Performanc		Manual	Local Service
	🧠 Phone Service	Manages th		Manual (Trig	Local Service
	🍓 Plug and Play	Enables a c	Running	Manual	Local System
	🍓 PNRP Machine Name Publication Service	This service		Manual	Local Service
	🌼 Portable Device Enumerator Service	Enforces gr		Manual (Trig	Local System
	🍓 Power	Manages p	Running	Automatic	Local System
	🍓 Print Spooler	This service	Running	Automatic	Local System
	🍓 PrintWorkflow_3bb8fe	Provides su		Manual (Trig	Local System
	🍓 Problem Reports Control Panel Support	This service		Manual	Local System
	🌼 Program Compatibility Assistant Service	This service	Running	Manual	Local System
	<				

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

Event Viewer (Local)	PDM Cache Audit	Number of events: 7,350				Act	ions		
> 🛱 Custom Views	Level	Date and Time	Source	Event ID	THEA	PD	M Cache Audit		^
🗸 🙀 Windows Logs									4
Application	(i) Information	2/15/2023 9:22:00 AM	Folder		None	1	Open Saved Log		
Security	(i) Information	2/15/2023 9:22:00 AM	Folder	-	None	7	Create Custom View		
Setup	(i) Information	2/15/2023 9:22:00 AM	Folder	0	None		Import Custom View		
🛃 System	(i) Information	2/15/2023 9:22:00 AM	Folder	0	None	- I			
Forwarded Events	<ol> <li>Information</li> </ol>	2/15/2023 9:22:00 A	Folder	0	None		Clear Log		
Applications and Services Logs	<ol> <li>Information</li> </ol>	2/15/2023 9:22:00 AM	Folder	0	None	7	Filter Current Log		
😭 CAD Partner Licensing Event Log	(i) Information	2/15/2023 9:22:00 AM	Folder	0	None		Properties		
ConverterServer	(i) Information	2/15/2023 9:22:00 AM	Folder	0	None				
Hardware Events	2.			-	、 <sup>×</sup>	88	Find		
😭 Internet Explorer	<u>`</u>				<u> </u>		Save All Events As		
👔 Key Management Service	Event 0, FolderAu	ditWatcher			×		Attach a Task To this Log		
> 🔛 Microsoft						-	-		
Microsoft Office Alerts	General Detail	s					View	•	
> OpenSSH					^	a	Refresh		
PDM Cache Audit		igert\AppData\Roaming\CA	D_Partner_G	mbH\PDM 3	2023\	?	Help		
PDM Server	\Metadata\PL	0M_000023.par.sxmd					Telp	,	
🛃 SmapInstaller	1 '					Eve	ent 0, FolderAuditWatcher		
SmapWebClient	Log Name:	PDM Cache Audit					Event Properties		
SmapXServer	Source:	FolderAuditWatcher	Logo	ied:	2/15/	-			
ThinPrint Diagnostics	<		33		•		Attach Task To This Event		
Windows PowerShell					>	Ba (	Сору	•	~
- C. G. and A. and	P					,			

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:



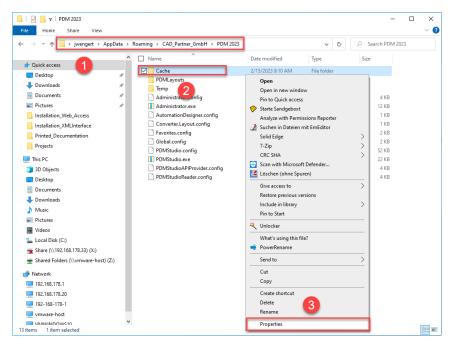
Check the result of the performed action										
Level: 🚺 War	ning	Copy Second								
	Time	Message								
= <b>!</b>	26.11	Initialization of the cache 'C:\Users\jwengert\AppData\Roaming\CAD_Partner_GmbH\PDM 2020\Cache' audit failed.								
- p	26.11	Validation of cache 'C:\Users\jwengert\AppData\Roaming\CAD_Partner_GmbH\PDM 2020\Cache' audit failed.								
	26.11	Cache audit 'C:\Users\wengert\AppData\Roaming\CAD_Partner_GmbH\PDM 2020\Cache' setup was not successfull, fallbacking to cache watcher.								
	26.11	Cache 'C:\Users\jwengert\AppData\Roaming\CAD_Partner_GmbH\PDM 2020\Cache' monitor failed to initialize.								
Φ	26.11	1 document(s) from total of 1 checked-in successfully, the rest (0) failed.								
			Close							

*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 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).



Cache Properties			×
General Sharing Security Previous	s Versions	Customize	
Object name: C:\Users\jwer	Data\Ro	aming\CAD	_Partn
Group or user names:			
SYSTEM			
iwengert (VMWINDOWS10);wer	ngert)		
Administratoren (VMWINDOWS)	10\Administ	ratoren)	
To change permissions, click Edit.			
To change permissions, click Eur.		Edit	
Permissions for SYSTEM	Allov	v Der	iy
			~
Full control	$\sim$		<u>^</u>
Full control Modify	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		
	~ ~ ~		2
Modify	~ ~ ~ ~ ~	0	0
Modify Read & execute	シンシン	2	
Modify Read & execute List folder contents	~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~	2	< >
Modify Read & execute List folder contents Read	v v v v ettings,	2 Advance	•
Modify Read & execute List folder contents Read Write For special permissions or advanced s	vettings.	2 Advance	•
Modify Read & execute List folder contents Read Write For special permissions or advanced s	vettings.	2 Advance	•

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

Advanced Sec	curity Settings for C	Cache						×
Name: Owner:	C:\Users\jwenge jwengert (VMWII		ng\CAD_Partner_G rt) 📢 Change	mbH\PDM 2023	3\Cache			
Permissions	Share	Auditing	Effective Access					
Do you wan	t to continue?							
					ОК	Cancel	Арр	ply

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



missions	Share	Auditing Effective A	ccess	
additional inf	formation, double-c	lick an audit entry. To mod	ify an audit entry, select the e	entry and click Edit (if available).
diting entries:				
Туре	Principal	Access	Inherited from	Applies to
		Full control		T1 2 2 1 1 1 2 1 1 1 2 1 2
Success	Jeder	2	None	This folder, subfolders and files
Add	Jeder	Edit	None	This folder, subfolders and files

Go to the "Auditing" tab (1). 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.

🖅 Run	×
٨	Type the name of a program, folder, document, or Internet resource, and Windows will open it for you.
<u>O</u> pen:	secpol.msc 🗸
	OK Cancel Browse

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

Local Security Policy File Action View Help		- □ >
<ul> <li>Secu 1. tings</li> <li>Account Policies</li> <li>Account Policies</li> <li>Account Policies</li> <li>Account Policy</li> <li>Account Policy</li> <li>Account Policy</li> <li>Secure 2. ions</li> <li>Windows or under Firewall with Advanced Security</li> <li>Network List Manager Policies</li> <li>Public Key Policies</li> <li>Software Restriction Policies</li> <li>Software Restriction Policies</li> <li>Application Control Policies</li> <li>Bescurity Policies on Local Computer</li> <li>Advanced Audit Policy Configuration</li> </ul>	Policy Audit account logon events Audit account management Audit directory service access Audit logon events Audit policy change Audit privilege use Audit privilege use Audit process tracking Audit system events Audit system events	Security Setting No auditing No auditing No auditing <u>Success</u> No auditing No auditing No auditing No auditing No auditing

# 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.

Audit object access P	operties	?	×
Local Security Setting	Explain		
Audit objec	access		
Audit these attem	1		
override cate	night not be enforced if other policy is ( gory level audit policy, imation, see <u>Audit object access</u> . (Q9)	-	
		2	
	OK Cance	el App	ly

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 for the security policy to be reset by Windows during the installation process after a Windows update has been installed. In this case, PDM Studio will report the error again and you will need to re-enable the "Monitor object access attempt properties".

#### 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 in the file "CADpartner\_FreePlugins\_V2023-MPxx.zip" located in the "\Plugins" directory of your installation files.

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

For more information on installing the Free- and Freeconverter plug-ins, refer to the Installation Plugins chapter in the "PDMStudio\_Installation\_2023\_EN.pdf" document.

#### Add - Add-On Tools

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

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

#### Open the zip file.

Zz C:\Users\j	jwengert\Deskto	p\PDMStudi	o_System	_Plugins.zip\			_		$\times$
Datei Bearb	eiten Ansicht	Favoriten	Extras	Hilfe					
÷		$\checkmark$	00	⇒ →		×	ī		
Hinzufügen	Entpacken	Überprüfen	Корі	ieren Verschiel	ben Lö	schen	Eigenschaften		
彦 📴 C:\U	lsers\jwengert\D	esktop\PDM	Studio_Sy	stem_Plugins.zip\					~
Name			Größe	Gepackte Größe	Geändert	am	Erstellt am	Letzter	Zugriff
Plugins			82 432	31 408	2020-10-1	4 07:15			
<									>
0 / 1 Objekt(e)	markiert								

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



→ 👻 🛧 📙 → This PC → Local Dis	k (C:) → F	rogram Files > CAD-Partner > PDM Stud	lio 2023 > Plugins >	~ Ō	, ○ Search Plugins	
Program Files	^	Name	Date modified	Туре	Size	
7-Zip		Automation	1/26/2023 8:42 AM	File folder		
CAD-Partner		CADPartner.Utilities	1/9/2023 5:07 PM	File folder		
Licensing Client 2023		CADPartner_FreeConverterPlugins	1/9/2023 5:08 PM	File folder		
Licensing Server 2023		CADPartner_FreePlugins	1/9/2023 5:07 PM	File folder		
PDM Studio 2023	Ε	Commands	2/8/2023 9:41 AM	File folder		
Addins	_	Events	1/26/2023 8:42 AM	File folder		
		Organizer 🤈	1/26/2023 8:42 AM	File folder		
Gnosti		📙 SolidEdge2019.Plugin	1/26/2023 8:42 AM	File folder		
Helps		SolidEdge2020.Plugin	1/26/2023 8:42 AM	File folder		
Plugins		SolidEdge2021.Plugin	1/26/2023 8:42 AM	File folder		
x64		SolidEdge2022.Plugin	1/26/2023 8:42 AM	File folder		
×86		SolidEdge2023.Plugin	1/26/2023 8:42 AM	File folder		
PDM Studio Automation 2023		UserInterfaces	1/26/2023 8:42 AM	File folder		
PDM Studio Server 2023		DocumentFormat.OpenXml.dll	1/25/2023 12:34 PM	Application exten	5,677 KB	
	~	Microsoft.VisualStudio.OLE.Interop.dll	1/25/2023 12:34 PM	Application exten	116 KB	

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 must 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.

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

<ul> <li>4</li> </ul>		PDM Studio Administrator	– = ×
			🍫 Options 👻 📥 Login 👻 👔 About   înfo 💡 Help
Welcome	Save 🚺 🕐 Defaults	🗘 Reset	
Organizer templates	PDM Studio Common Settings	🔺 ᄎ Collapse all 🔮 Defaults 🐧 Reset	
Article templates	🕐 Predefined queries 📳 Organizer templates	Select required plugins:	More plugins selection:
Project templates	Application plugins  Plugins manager	Event	Plugin
Users and groups	···· ∕≧ Properties to view	⊡ General ⊡ Events	
Status user rights			
Settings	🏪 Unique properties		
Jobs provid	🎦 Commands manager 🔂 Layout order	PDM Studio 2023	×
SE Solid Edge Applications	🛱 Generators 😳 Miscellaneous	8	
XML Interface	📒 Languages 📋 System logging	Complete definition for following plugins: Revise Documents Validator: plugin missing. Structure Viewer: plugin missing.	3
Install libraries	PDM Studio Automation Server Settings	Where Used Viewer: plugin missing.	
🗱 Tools	□ PDM Studio Solid Edge plugin		OK
	PDM Studio Organizer / project plugins     Mi XML Listbox Multi	Copy to clipboard	
	···· III XML Listbox		
	🔊 XML Process Listbox		
~	PDM Studio User Interfaces plugins Property revision blocker	<b>v</b>	
Customize system settings accor	ding to your needs.		

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**)).

nt	Plugin		
Project Properties Multieditor	Default project properties multieditor	•	
Project Structure Selector	Default project structure selector	-	
Project Visual Selector	Default project visual selector	•	
Recycle Documents Selector	Default document Recycle selector	•	
Release Documents Selector	Default document Release selector	•	
Release Documents Validator	Default document Release validator	•	
Remove Category Selector	Default standard category Remove selector	-	
Remove Documents Selector	Default document Remove selector	-	
Remove Project Selector	Default project Remove selector	-	
Replace documents selector	Default document Replace selector.	-	
···· Replace templates validator	Default replace templates validator	-	Ξ
Revise Documents Selector	Default document Revise selector	-	
Revise Documents Validator		-	
	ctor Default document Revise validator		
Revision Hditor	Default document revision history editor	•	
Revision History Multieditor	Default documents revision history multice	-	
Source Files Selector	Default source file selector	-	
Source Folder Selector	Default source folder selector	-	
	Default standard category attributes editor	-	

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).

<b>&amp;</b> 1		PDM Studio Administrator	- 🗆 ×
			🛛 🍫 Options 👻 📥 Login 👻 👔 About  🎁 Info 💡 Help
Welcome	💾 Save 🔃 Refresh 🕑 Defaults 🔃 Res	t	
Organizer templates	PDM Studio Common Settings     Display names	🕿 Collapse all 🛛 🕑 Defaults 🏾 🏮 Reset	
Article templates	? Predefined queries	Select required plugins:	More plugins selection:
Project templates		Event Plugin	
	- Villing in Standard Plugins manager	User interface     Category Info multilanguage editor     Default Category Info multi-language editor	
Users and groups	🔁 Properties to view 🔄 Properties to view	Change Status Documents Selector Default document Change status selector	•
Status user rights	Expositive arties	Change Status Projects Selector Default project Change s 2 ector	•
Settings	🏪 Unique properties	Check-in history editor     Default document check-in history editor	•
Jobs provider	····· 💏 Commands manager ····· 😽 Layout order	Check-in history multieditor     Default documents check-in history multieditor	- -
SE Solid Edge Applications	ABC Generators	PDM Studio 2023	× .
XML XML Interface			•
XML Interface	System logging     Dystem logging     PDM Studio Automation Server Settings	Settings have been saved successfully.	
Install libraries	Jobs sender	3	•
💋 Tools	PDM Studio Solid Edge plugin     Properties	ОК	
	PDM Studio Organizer / project plugins     XMQ XML Listbox Multi	Copy to clipboard	
	KML LISEDOX MUID	- Job scheduling document selector Job scheduling document selector	
	ML Process Listbox	Multi History Multieditor Default documents multi history multieditor	
	L 🎭 XML Project Listbox	Normalize Documents Selector     Default document Normalize selector	



# Other enhancements/improvements/changes/fixed bugs

# Enhancements

Module	Description
NX integration	Added support for NX 2312.
PDM Studio API	Added API support for .NET 8.0.
Solid Edge integration	Added support for Solid Edge 2025.
Solid Edge integration	Added support for Solid Edge Browse command when inserted
	assembly copy is edited.
SOLIDWORKS integration	Added support for SOLIDWORKS 2025.

### Improvements:

Module	Description
Automation Administrator	Added a new info text to Job Storage configuration about Automation
	Server service.
Client Administrator	Unified tooltips for Plugin Manager - Events tooltips.
NX integration	Improved installation of the NX integration about automatic detection
	of already installed NX version.
PDM Studio	Improved working with Import user documents wizards on the last
	Organizer step. When user went back all filled data was lost.
PDM Studio	Improved texts and icons of the Scheduling wizard for sending
	Automation jobs.
PDM Studio Server	Improved the bulk validation of the global and template uniqueness in
	multieditors (Part Keeper).
Server Administrator	Added validation before the restore process for database content. The
	restore is valid only to "empty" databases.
Solid Edge integration	Optimized saving of draft and assembly documents in Solid Edge. It
	touches mainly documents where Up To Date flag is updated.

# Changes:

Module	Description
General	Textbox unique in project templates is no longer supported for process
	properties.
General	"Copy Selection" (Ctrl+C in table editors) does not copy headers
	anymore (compatibility issue).
Installation	Microsoft .NET 8.0 installation is set as prerequisite of Client, Server,
	Automation and XMLI installations.
Part Keeper	Not unique property values are logged as errors instead warnings.
PDM Studio	Previews names in Unmanaged export follow names of exported
	documents now.



# **Repaired Bugs:**

Module	Description
Automation	Fixed the email notification content of Automation jobs where
	reported successfully and unsuccessfully plugins were shift.
General	Fixed initialization of all PDM Studio clients when not unique plugins
	are found.
General	Fixed the PDM Studio database migration from PDM Studio 2020 to
	PDM Studio 2023 for specific situation of project links.
Installation	Fixed inability to silent uninstall PDM Studio and XML interface.
Installation	Fixed inability of the silent uninstallation of PDM Studio and XML
	interface.
Migration	Fixed detection and reporting filename duplicities after migration
	recovery without of the application restart.
MS Office integration	Fixed an exception when standard properties are read/written from/to
	MSO Excel file created without standard properties property set.
Part Keeper	Fixed missing validation of the template property uniqueness for non-
	master documents. Validation was only on PDM Studio server but
	directly in PK GUI was missing.
PDM Studio	Fixed assigning already checked-out documents in the 'finish' process
	of Import Folders wizard. Logging has been improved.
PDM Studio	Fixed checking of the "change links" permission during "move folder"
	operation.
PDM Studio	Fixed displaying a warning message during validation of unique
<u> </u>	properties. This message was displayed twice redundantly.
PDM Studio	Fixed the unmanaged export of the highest link revisions.
PDM Studio	Hidden the redundant Filter button in Static structure panel.
PDM Studio	Fixed freezing the Release document wizard when there is internally
	some check-out document.
PDM Studio	Fixed translation of the 'Ignore All' button in validation step of Revise,
	Release and Copy document wizards.
PDM Studio	Fixed checking of template uniqueness for non-master documents
	during Document revision process. All non-master documents in one
	range can have not unique values.
PDM Studio	Fixed an exception when the same project is selected more times in
	Query Result panel and Replace project template wizard is started.
PDM Studio	Fixed reported redundant errors when root project is moving back to
	the root.
PDM Studio	Fixed freezing the Updater document wizard when there is internally
	some check to document and message about 'check-in' process is
	wrongly displayed.
PDM Studio	Fixed possibility to define properties to view in Document Manager
	panel Revision History view.
PDM Studio	Fixed setting of default options in Unmanaged Export wizard.
PDM Studio	Fixed getting documents from Update wizard model by external
	plugins.



PDM Studio Reader	Fixed disabling Set and Remove active project buttons in PDM Studio
	Reader.
Solid Edge integration	Fixed an API communication issues when drawing has been created in
	Solid Edge 2024 and immediately checked-in.
Solid Edge integration	Fixed freezing of the Increase document version wizard started directly
	from PDM Studio Solid Edge integration.
Solid Edge integration	Fixed getting stuck the Solid Edge PDM Studio integration ribbon bar
	because endless synchronization running when assembly contains
	cyclic links.



Imprint



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