



PDM Studio

What's new 2023 | EN | MP 02

CAD Partner GmbH
Am Marktplatz 7
93152 Nittendorf
Deutschland

Telefon +49 9404 9639-21
Fax +49 9404 5209
E-Mail info@CADpartner.de
Internet www.pdm-studio.tech

Geschäftsführer
Dipl.-Ing. (FH) Werner Heckl
HRB Regensburg 7083
USt-ID DE197223274
St.-Nr. 244/123/000056

Raiffeisenbank Oberpfalz Süd EG
BLZ 750 620 26
Konto 21 474
SWIFT GENODEF1DST
IBAN DE25 7506 2026 0000 0214 74



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 Client Administrator 5

 Aliases in Properties to view 5

 Expose display name..... 6

 Continuous connection verification to the Automation Server 7

 Plausibility check document type decider 8

 Prerequisite for correct operation of the feature 9

PDM Studio 10

 Move all standard parts from old category to new revised category 10

 Change category name/path in wizard when revising default categories 15

 Added linking options for downloading structures in the optional Unmanaged Export command plugin. 18

 Using Aliases 19

 Multiselection for editing in Partkeeper 20

 Editing of all user documents OR standard parts of a structure 21

PDM Studio Automation Designer 23

 Added "Auto" option for Solid Edge and SOLIDWORKS plugins..... 23

PDM Studio Automation 24

Solid Edge 25

 Expose display names 25

 Select the Reload Link Options option for the Reload command on the Solid Edge PDM Studio ribbon. 27

Other (Technotes)..... 29

 General 29

 Message Cache monitoring could not be initialized 29

 Disabling cache monitoring..... 34

Installation	35
Plugins in general:.....	35
After Installation	35
General	35
Add - Add-On Tools.....	35
Client Tools	37
Setup Client Administrator	37
Other enhancements/improvements/changes/fixed bugs	39
Enhancements:	39
Improvements:	39
Changes:	40
Repaired Bugs:	40
Imprint	41

Introduction

PDM Studio 2023 MP02 is a maintenance release of PDM Studio. It mainly contains bug fixes and some enhancements.

The most important points are described in detail in the following sections. All other details not listed in detail are described under the section [Enhancements/Improvements/Changes/Fixed bugs](#).

More information on the **installation of the V2023 MP02** is available in the document:

[“PDMStudio_Installation_2023_EN.pdf”](#)

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

Licensing 2023

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

Supported Operating Systems:

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

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

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

Update Licensing Version 2023

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

The new Cadpartner V2023 Licensing will be automatically installed during the installation of PDM Studio V2023 MP02.

Installation

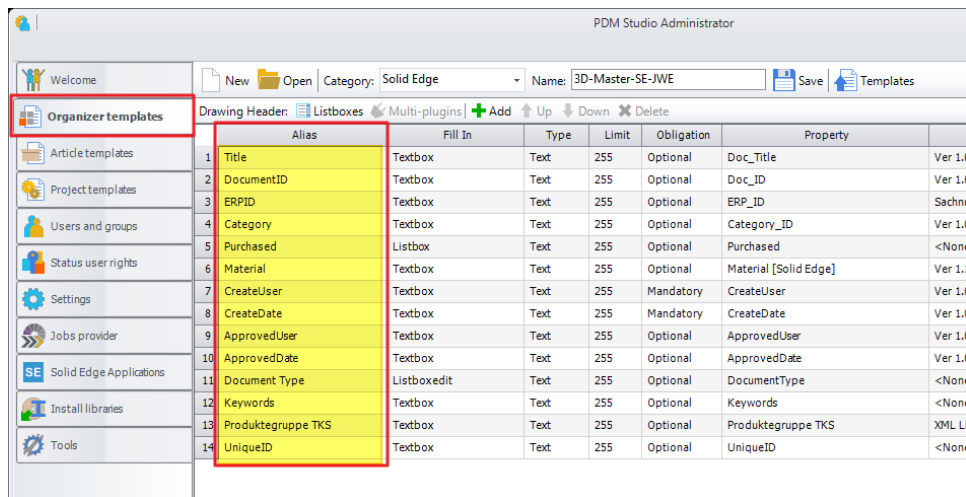
Important: We strongly recommend checking in all documents and clearing the local cache on all clients before installing PDM Studio V2023 MP02.

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

PDM Studio Client Administrator

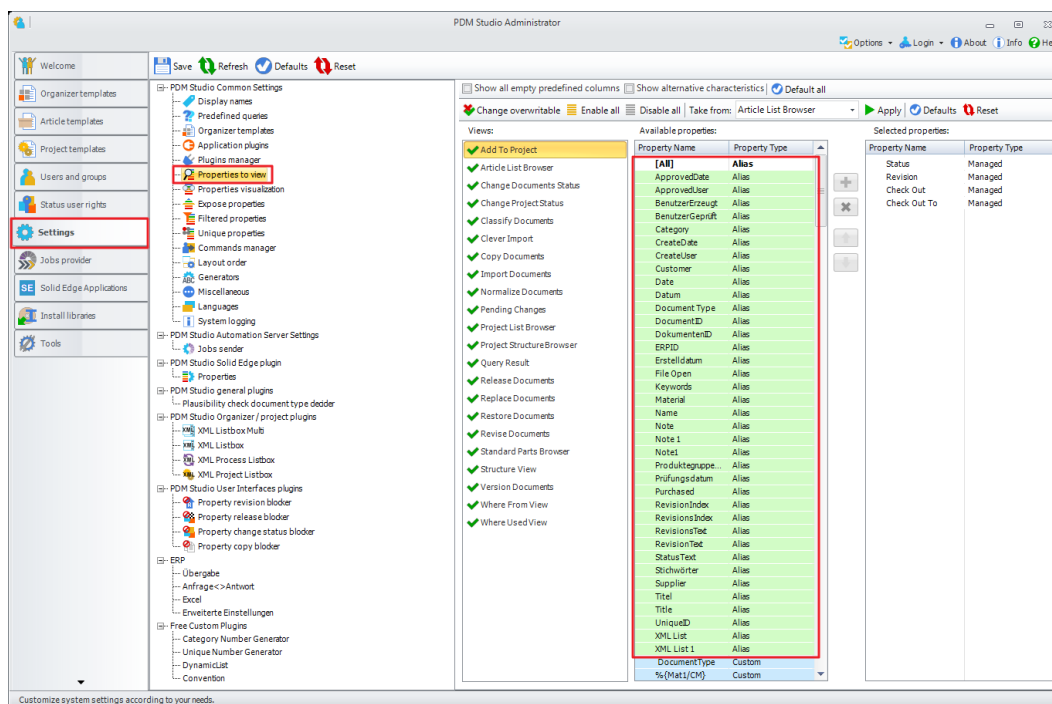
Aliases in Properties to view

Aliases (defined in the Document Organizer template) can now be displayed in a variety of PDM Studio views as needed.



Alias	Fill In	Type	Limit	Obligation	Property	
1 Title	Textbox	Text	255	Optional	Doc_Title	Ver 1.0
2 DocumentID	Textbox	Text	255	Optional	Doc_ID	Ver 1.0
3 ERPID	Textbox	Text	255	Optional	ERP_ID	Sachnu
4 Category	Textbox	Text	255	Optional	Category_ID	Ver 1.0
5 Purchased	Listbox	Text	255	Optional	Purchased	<None
6 Material	Textbox	Text	255	Optional	Material [Solid Edge]	Ver 1.1
7 CreateUser	Textbox	Text	255	Mandatory	CreateUser	Ver 1.0
8 CreateDate	Textbox	Text	255	Mandatory	CreateDate	Ver 1.0
9 ApprovedUser	Textbox	Text	255	Optional	ApprovedUser	Ver 1.0
10 ApprovedDate	Textbox	Text	255	Optional	ApprovedDate	Ver 1.0
11 Document Type	Listboxedit	Text	255	Optional	DocumentType	<None
12 Keywords	Textbox	Text	255	Optional	Keywords	<None
13 Produktgruppe TKS	Textbox	Text	255	Optional	Produktgruppe TKS	XML Lis
14 UniqueID	Textbox	Text	255	Optional	UniqueID	<None

The **aliases** created in the Organizer template are now displayed in **Settings > Properties to view**.

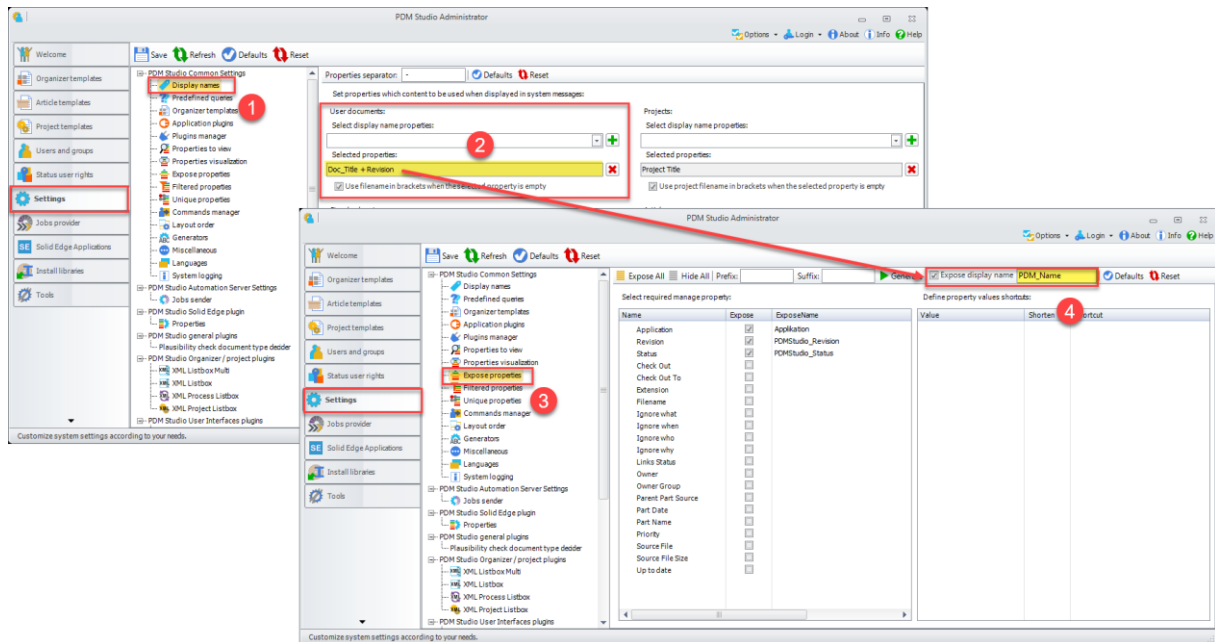


Property Name	Property Type
[All]	Alias
ApprovedDate	Alias
ApprovedUser	Alias
BenutzerErzeugt	Alias
Category	Alias
CreateDate	Alias
CreateUser	Alias
Customer	Alias
Date	Alias
Datum	Alias
DocumentType	Alias
DocumentID	Alias
DokumentenID	Alias
ERPID	Alias
Erstelldatum	Alias
File Open	Alias
Keywords	Alias
Material	Alias
Name	Alias
Note	Alias
Note 1	Alias
Note 2	Alias
Produktgruppe	Alias
Prüfungsdatum	Alias
Purchased	Alias
RevisionIndex	Alias
RevisionsIndex	Alias
RevisionsTab	Alias
RevisionTab	Alias
StatusText	Alias
Stichwörter	Alias
Supplier	Alias
Title	Alias
Title	Alias
UniqueID	Alias
XML List 1	Alias
XML List 2	Alias
DocumentType	Custom
%(Matl/CM)	Custom

The **aliases** are displayed in "green highlighted color" and are shown as type "Alias."

Aliases can be added to a view or dialog already here in the Client Administrator or selected later in [PDM Studio](#).

Expose display name



General Information: *Display names (1) are used to identify documents in PDM Studio dialogs and views (e.g. query result in PDM Studio). Here you define which properties should be used as display names for the different document types.*

*Display names of user documents can be composed of several property values. The **Selected Properties** field (2) shows the current display name pattern.*

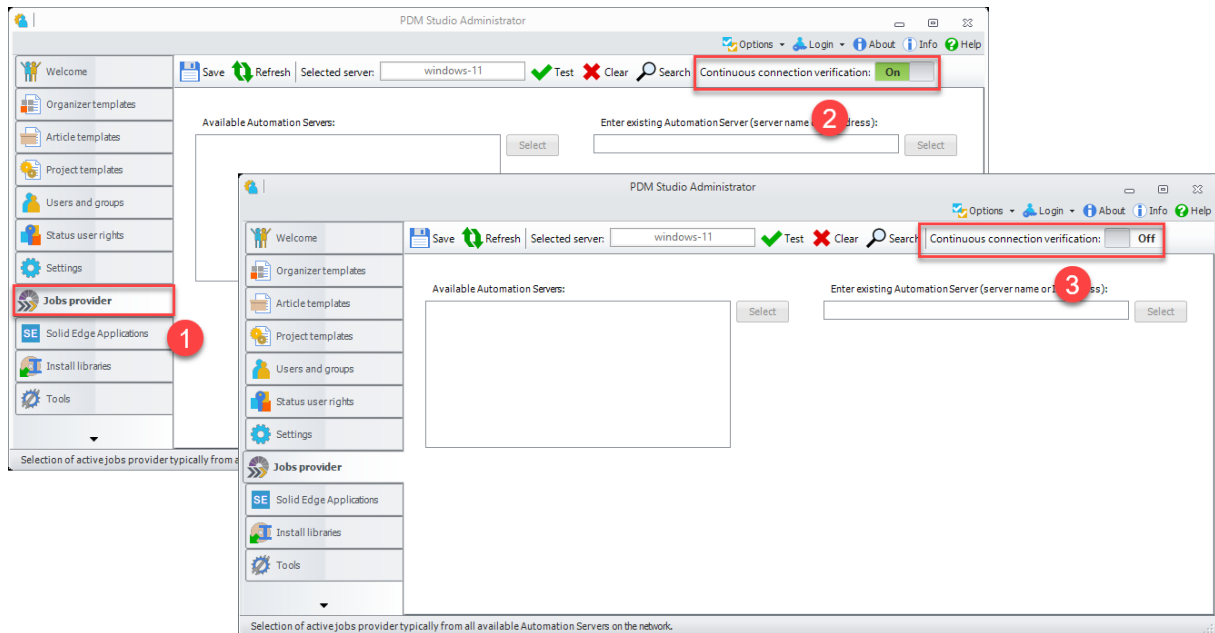
The background of the new function "**Expose display names**" (4) is the possibility to publish a composed set of properties for user documents in the "**Selected Properties**" section, as a new user defined property, which can then be used in Solid Edge. This ensures that the display in PDM Studio and in Solid Edge Pathfinder is identical.

The "**Expose display names**" function (4) under Settings > Expose properties (3) takes the properties defined under "**Selected properties**" (2) and writes them into the new property that you have defined in the input field behind the new "**Expose display names**" function (4).

In our example, this would be "**PDM_Name**" (4). In our example, this means that the new **Expose display name property "PDM_Name"** contains the values of the "Doc_Title AND Revision" properties.

[More about this in the Solid Edge section.](#)

Continuous connection verification to the Automation Server

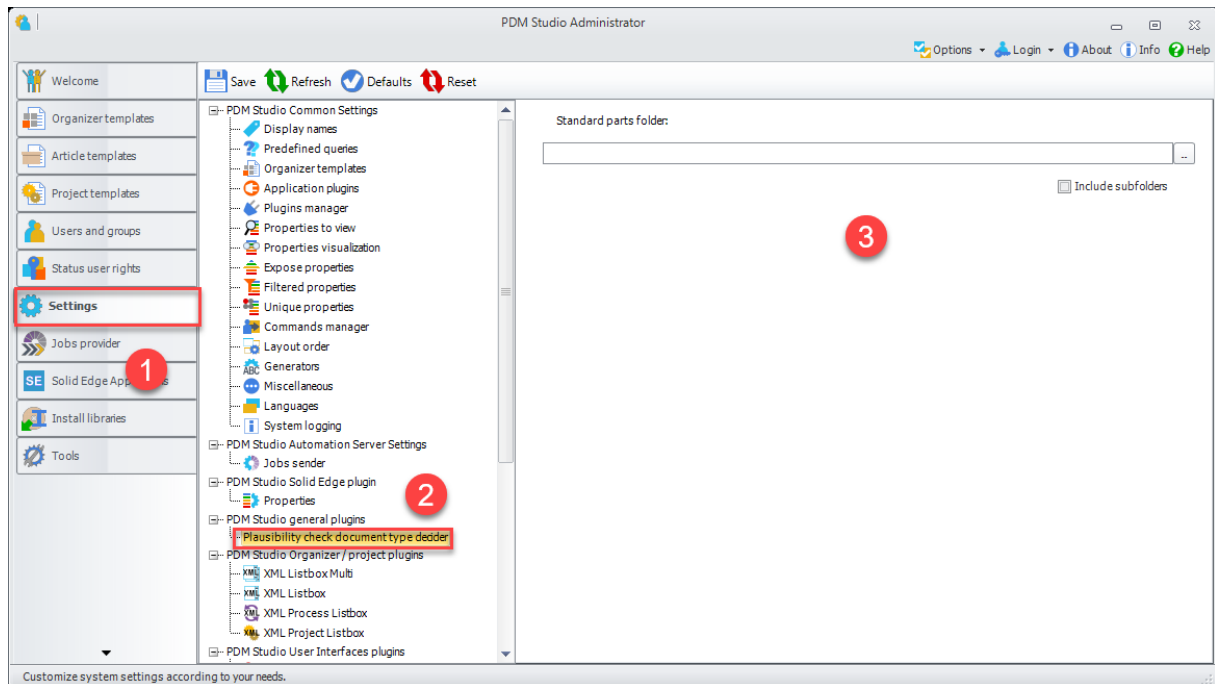


A switch has been added to the **Automation Server settings (1)** to **enable/disable** continuous verification of the connection to the Automation Server.

If the switch is set to **On (2)**, the check is performed approximately every 30 seconds as before and the results are displayed in the PDM Studio log window.

If the switch is set to **Off (3)**, no connection check to the Automation Server is performed.

Plausibility check document type decider



The new function can be found in the **Settings (1)** in the sub-settings **PDM Studio general plugins > Plausibility check document type decider (2)**.

Note: For customers using only the standard parts of Solid Edge, the new feature is obsolete.

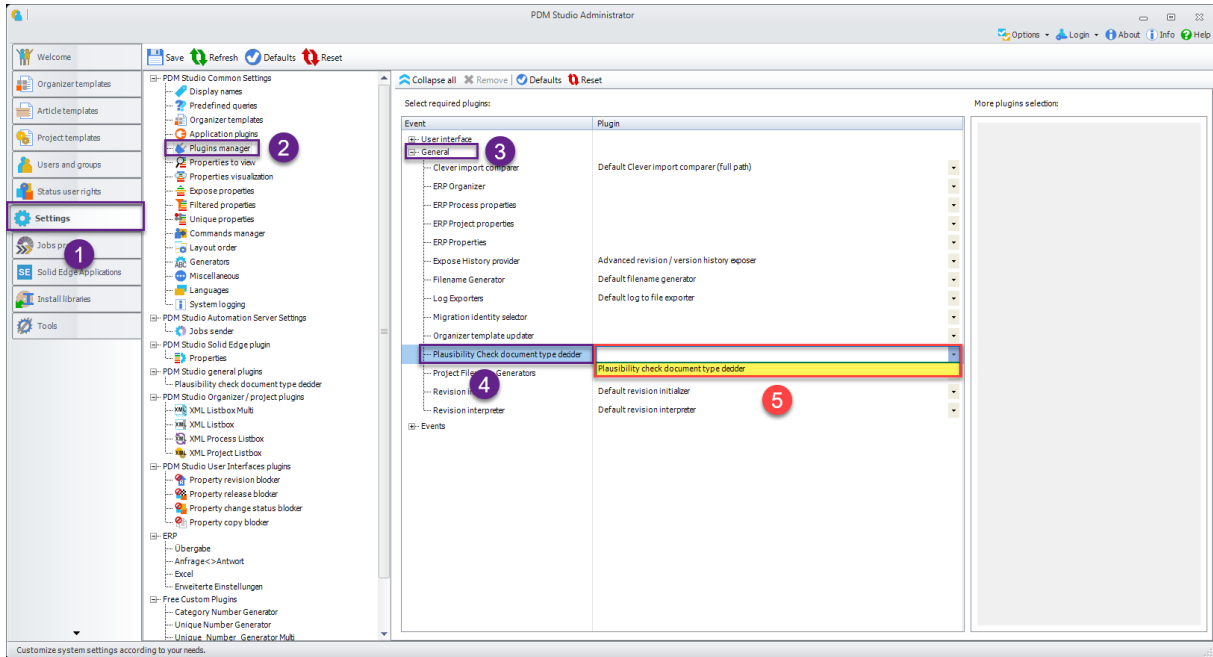
If you use other standard parts (e.g. self-created standard parts that are not based on the standard parts of Solid Edge), a **standard parts folder (3)** can be specified here.

The plugin then uses the source path (local standard parts folder) to decide whether all parts in this folder should be imported as standard parts. The option "**Include subfolders**" (3) will include all subfolders.

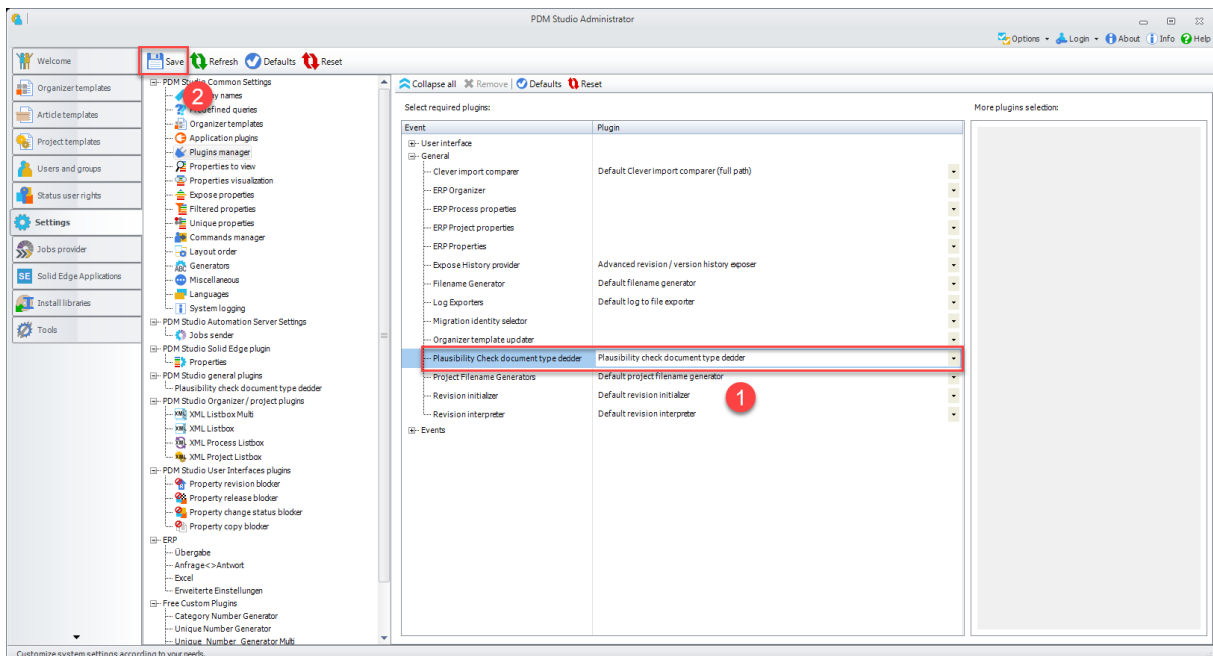
Important: All other documents that are NOT in the selected folder are imported as user documents.

This functionality is also useful to identify standard parts from other 3D CAD systems such as SOLIDWORKS and Inventor as standard parts during import.

Prerequisite for correct operation of the feature



To use this function, the plugin "**Plausibility Check document type decider**" must be **selected** from the **pull-down list (5)** and **added** to the event "**Plausibility Check document type decider**" (4) in the **Settings > Plugins Manager (1,2)** in the section "**General**" (3).



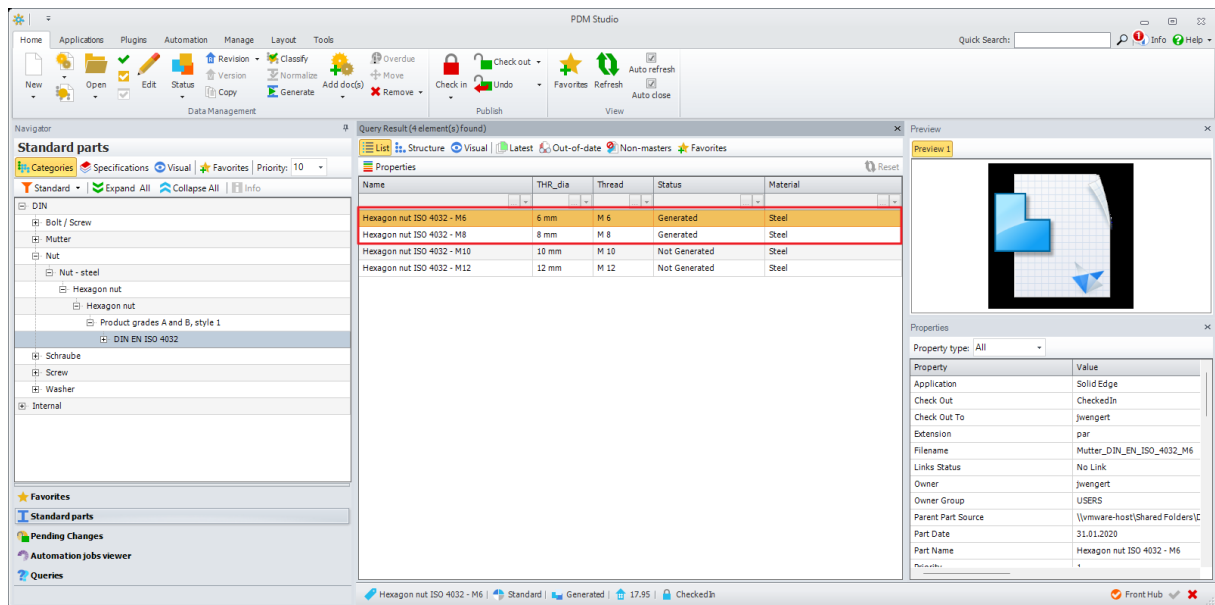
Once the **plugin is selected (1)**, "**Save**" the setting (2).

The function is now ready to use.

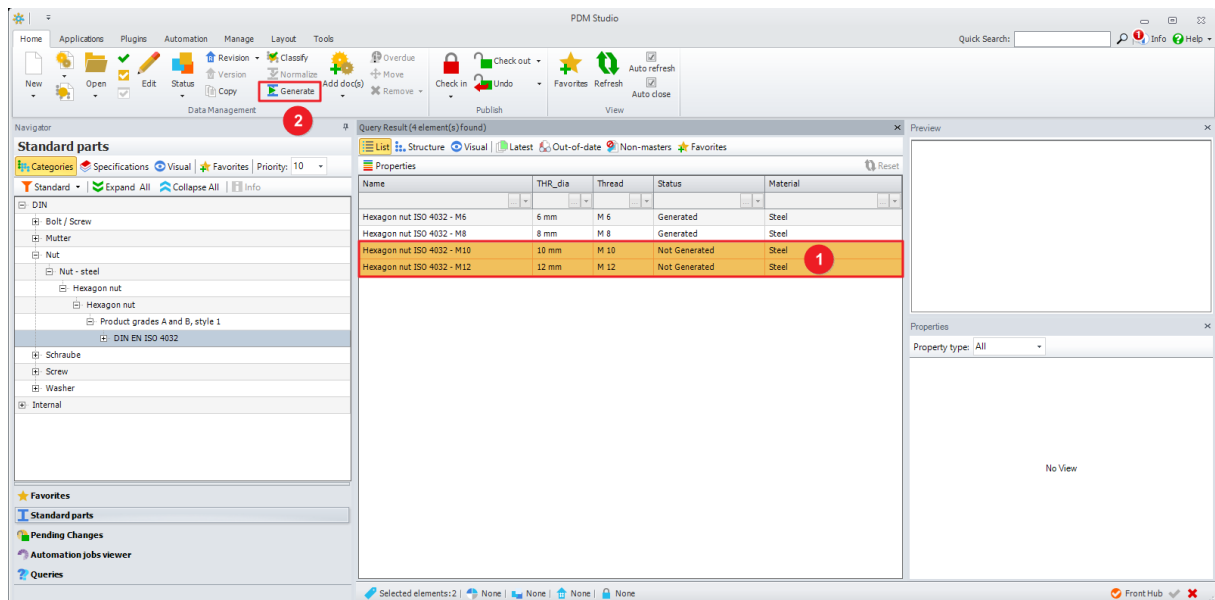
PDM Studio

Move all standard parts from old category to new revised category

Functional limitation: Only if ALL parts in the category have the status "Generated", the new option "Move all standard parts to a new category revision" can be used correctly.

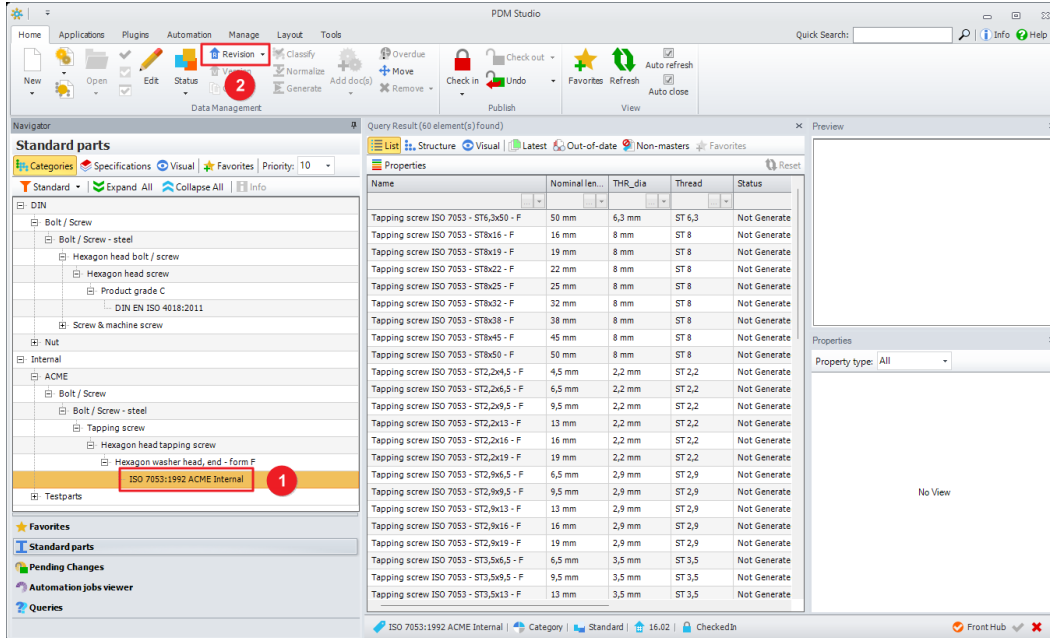


If you move standard parts in the category with the status "Not generated", these standard parts CANNOT be generated with the "Generate" function (2) after the function is finished.

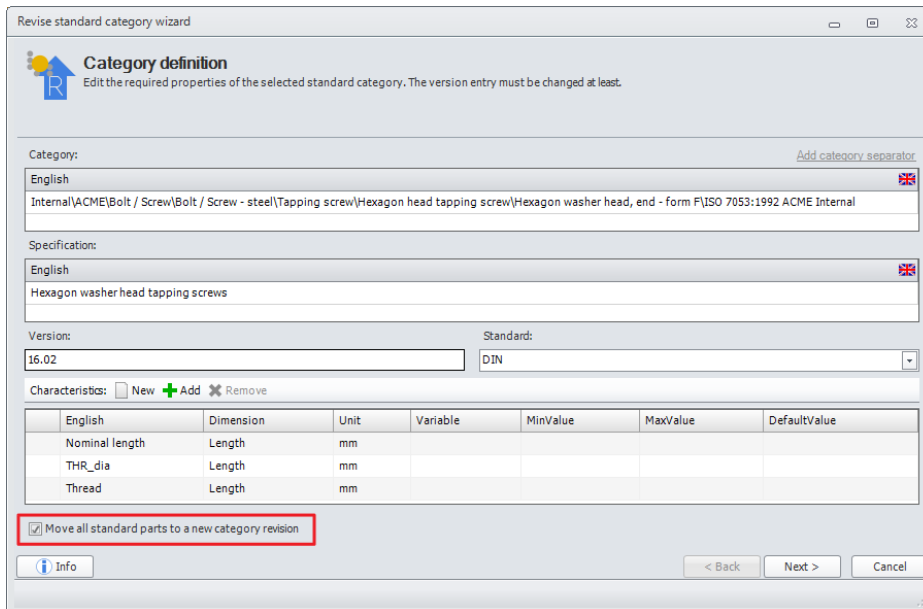


This means that ALL standard parts of the category with the status "Not generated" (1) MUST be "generated" with the "Generate" function (2) BEFORE they are moved with the new option.

Added the ability to move all standard parts of a category to the newly created category revision during category revision.



To move all the standard parts contained in a category when revising it, first select the category to be revised (1) and then press the "Revision" command (2). The category revision wizard will be launched.



In the first step of the wizard, select the new option marked in red "Move all standard parts to a new category revision".

Use this option to specify that all standard parts will be moved to the newly created revision of the category once the operation is complete.

Revise standard category wizard

Category definition

Edit the required properties of the selected standard category. The version entry must be changed at least.

Category: Add category separator
 English 🇬🇧
 Internal\ACME\Bolt / Screw\Bolt / Screw - steel\Tapping screw\Hexagon head tapping screw\Hexagon washer head, end - form F\ISO 7053:1992 ACME Internal

Specification:
 English 🇬🇧
 Hexagon washer head tapping screws

Version: 16.03 Standard: DIN

Characteristics: New Add Remove

	English	Dimension	Unit	Variable	MinValue	MaxValue	DefaultValue
	Nominal length	Length	mm				
	THR_dia	Length	mm				
	Thread	Length	mm				

Move all standard parts to a new category revision

Info < Back Next > Cancel

In the next step, you MUST increase the version (new revision number) of the new category. Then click "Next >".

Revise standard category wizard

Category info

Set all values for characteristics. The values must be set for all documents within all categories. The categories are listed, and can be switched, in the left pane.

Select: Find | Edit: Fill Fill Empty

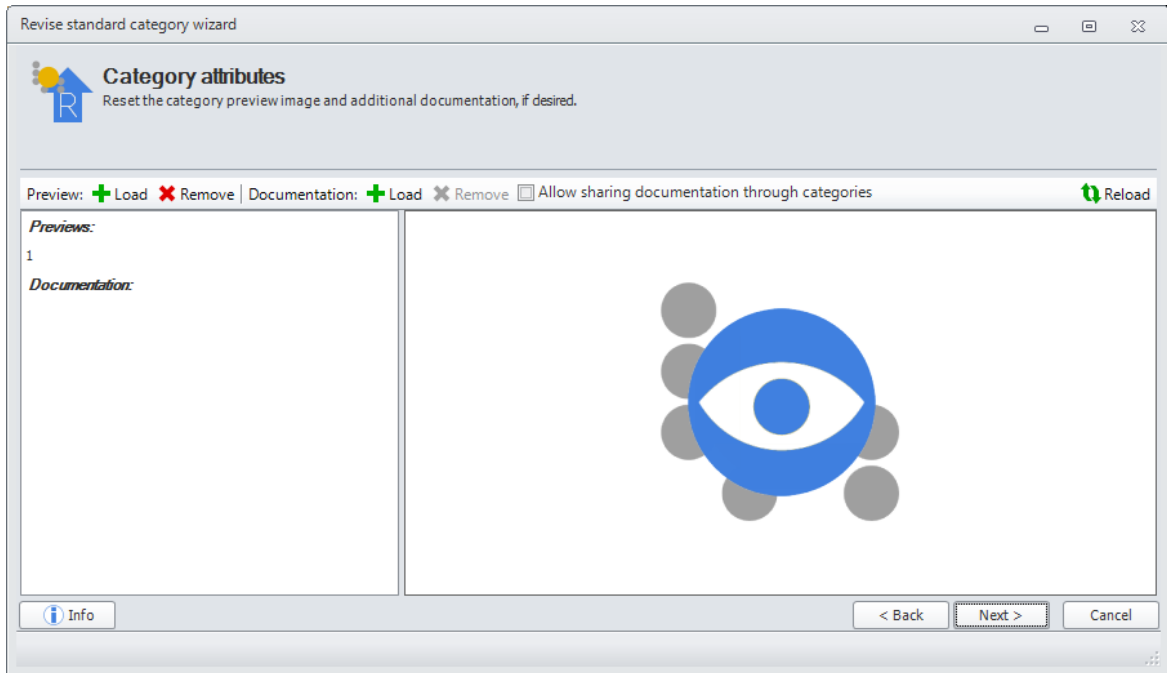
1

ISO 7053:1992 ACME Internal (16.03)

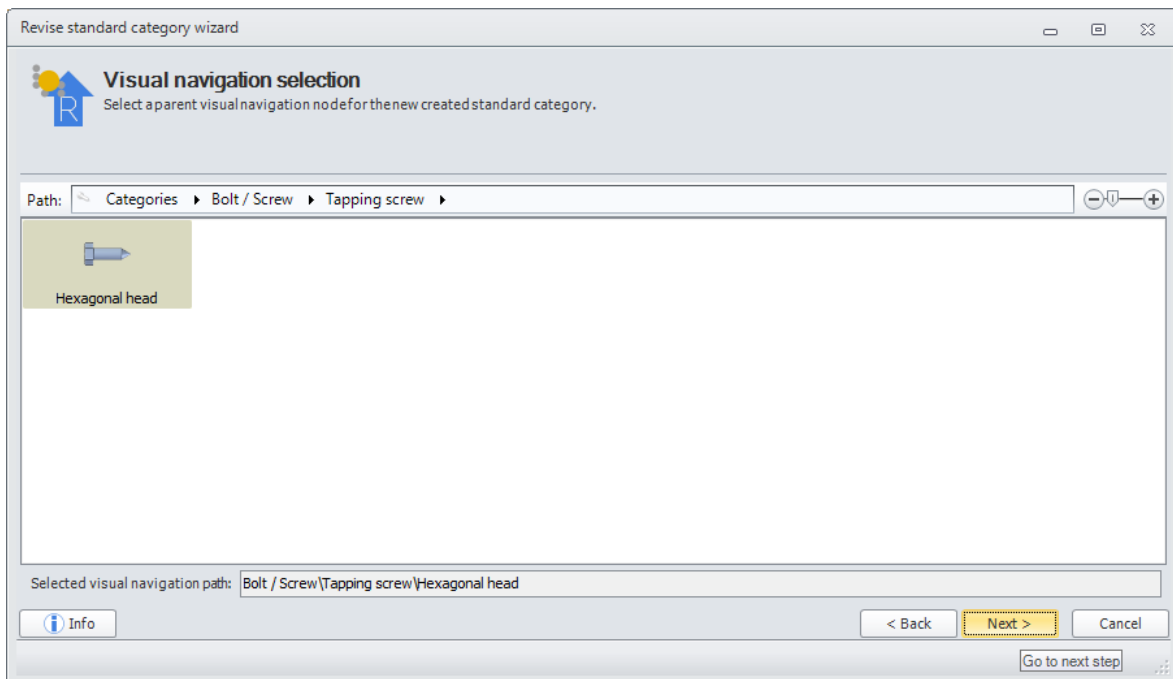
Name	Part Name	Filename
Tapping screw ISO 7053 - ST6,3x50 - F	Tapping screw ISO 7053 - ST6,3x50 - F	Schraube_DIN_ISO_7053_1992_ST6.3x50_
Tapping screw ISO 7053 - ST8x16 - F	Tapping screw ISO 7053 - ST8x16 - F	Schraube_DIN_ISO_7053_1992_ST8x16_F
Tapping screw ISO 7053 - ST8x19 - F	Tapping screw ISO 7053 - ST8x19 - F	Schraube_DIN_ISO_7053_1992_ST8x19_F
Tapping screw ISO 7053 - ST8x22 - F	Tapping screw ISO 7053 - ST8x22 - F	Schraube_DIN_ISO_7053_1992_ST8x22_F
Tapping screw ISO 7053 - ST8x25 - F	Tapping screw ISO 7053 - ST8x25 - F	Schraube_DIN_ISO_7053_1992_ST8x25_F
Tapping screw ISO 7053 - ST8x32 - F	Tapping screw ISO 7053 - ST8x32 - F	Schraube_DIN_ISO_7053_1992_ST8x32_F
Tapping screw ISO 7053 - ST8x38 - F	Tapping screw ISO 7053 - ST8x38 - F	Schraube_DIN_ISO_7053_1992_ST8x38_F
Tapping screw ISO 7053 - ST8x45 - F	Tapping screw ISO 7053 - ST8x45 - F	Schraube_DIN_ISO_7053_1992_ST8x45_F
Tapping screw ISO 7053 - ST8x50 - F	Tapping screw ISO 7053 - ST8x50 - F	Schraube_DIN_ISO_7053_1992_ST8x50_F
Tapping screw ISO 7053 - ST2,2x4,5 - F	Tapping screw ISO 7053 - ST2,2x4,5 - F	Schraube_DIN_ISO_7053_1992_ST2.2x4.5_
Tapping screw ISO 7053 - ST2,2x6,5 - F	Tapping screw ISO 7053 - ST2,2x6,5 - F	Schraube_DIN_ISO_7053_1992_ST2.2x6.5_
Tapping screw ISO 7053 - ST2,2x9,5 - F	Tapping screw ISO 7053 - ST2,2x9,5 - F	Schraube_DIN_ISO_7053_1992_ST2.2x9.5_
Tapping screw ISO 7053 - ST2,2x13 - F	Tapping screw ISO 7053 - ST2,2x13 - F	Schraube_DIN_ISO_7053_1992_ST2.2x13_
Tapping screw ISO 7053 - ST2,2x16 - F	Tapping screw ISO 7053 - ST2,2x16 - F	Schraube_DIN_ISO_7053_1992_ST2.2x16_
Tapping screw ISO 7053 - ST2,2x19 - F	Tapping screw ISO 7053 - ST2,2x19 - F	Schraube_DIN_ISO_7053_1992_ST2.2x19_

Info < Back Next > Cancel

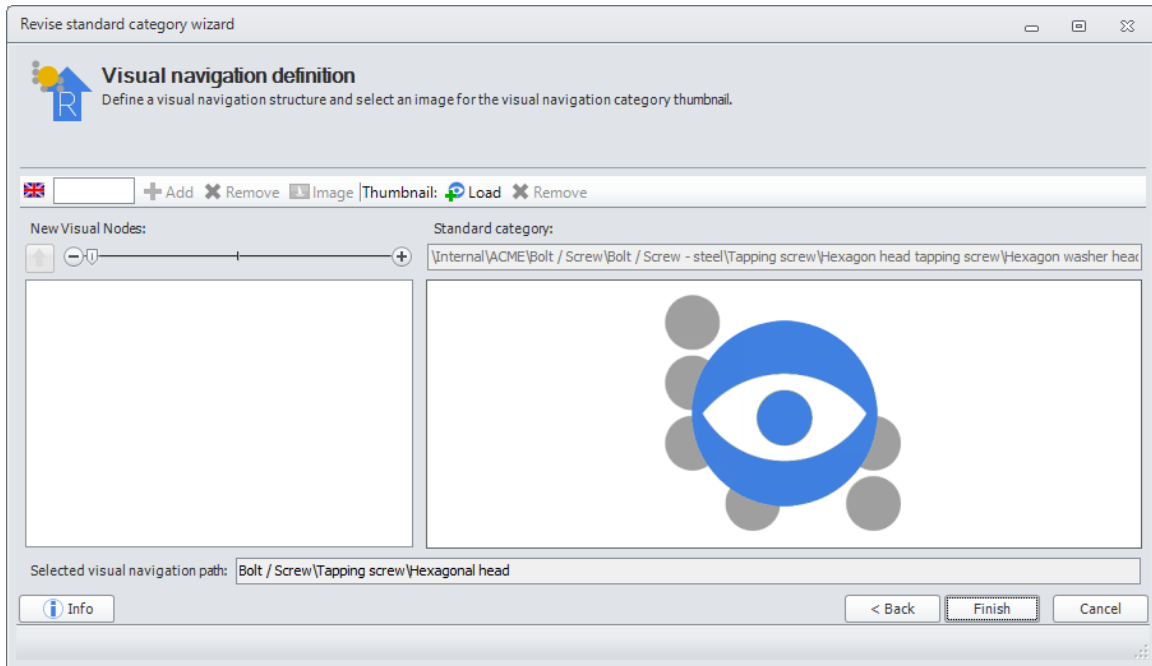
You will see (highlighted in red) the **new revision number (1)** and in the **main window (2)** all the standard parts to be moved. Click on "Next >".



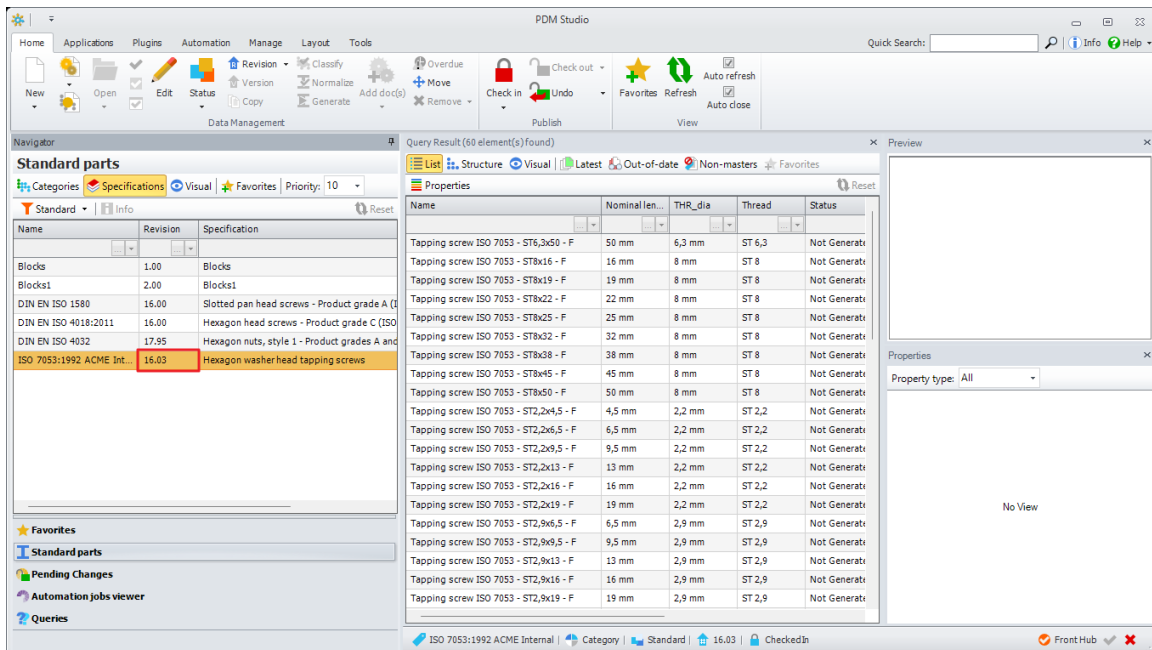
In this step you can change the category attributes as always. Click "Next >"



The graphical navigation settings are already defined for a normal default standard part category. Click on "Next >"



No changes are usually required in the final step. Click "Finish" to create the new category revision.



In PDM Studio, the new category appears as a **new revision** (highlighted in red) with all standard parts moved.

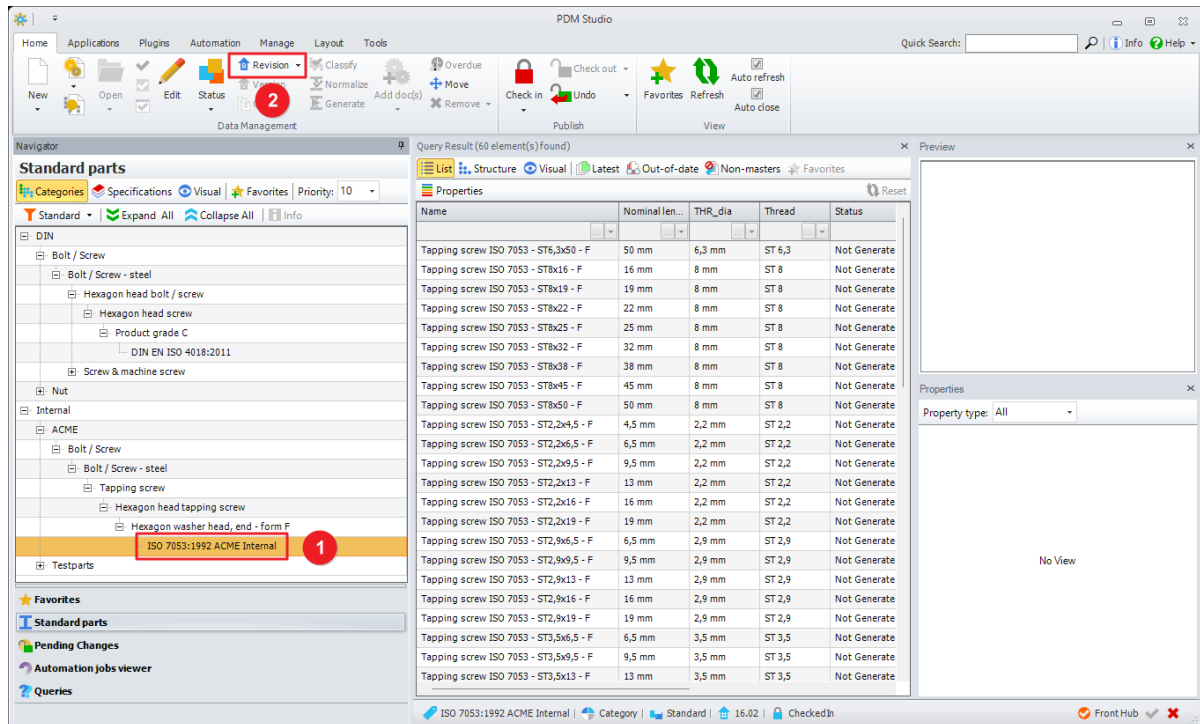
Note: The moved standard parts retain the revision in which they were created.

For example: If the standard part was created (or imported) in revision 16.00, and the new category has revision 16.03 - then the standard part keeps revision 16.00.

Change category name/path in wizard when revising default categories

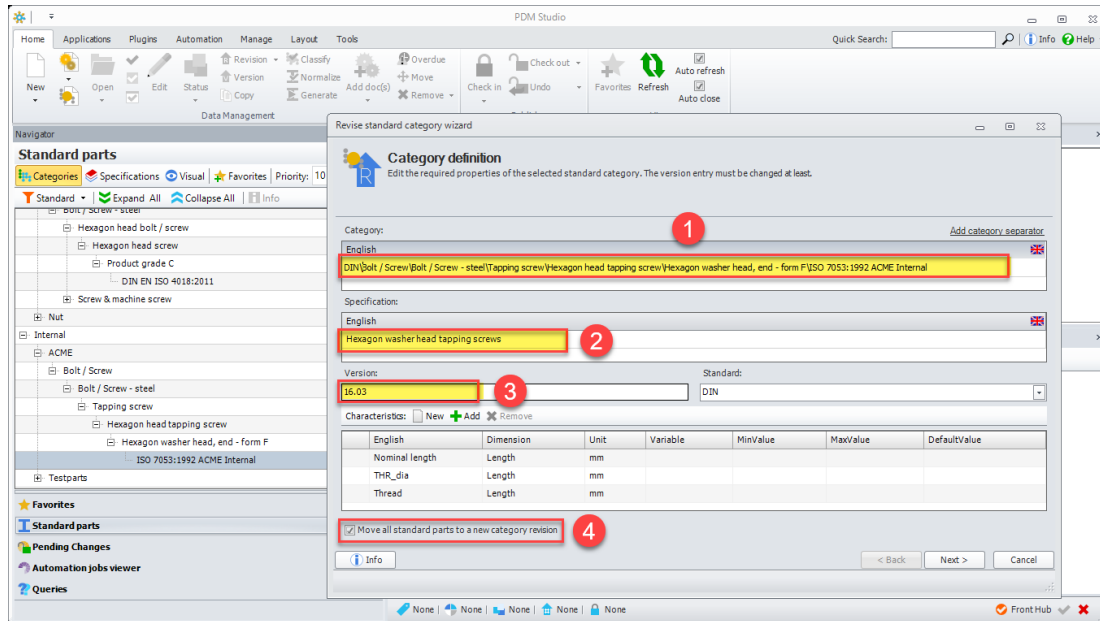
The second function is identical to the function for transferring all standard parts from the old category to the new revised category.

In addition, when revising a category, it is now possible to change the category path and move all standard parts with it, or to create only the new revised category in the same path or with a changed category path.



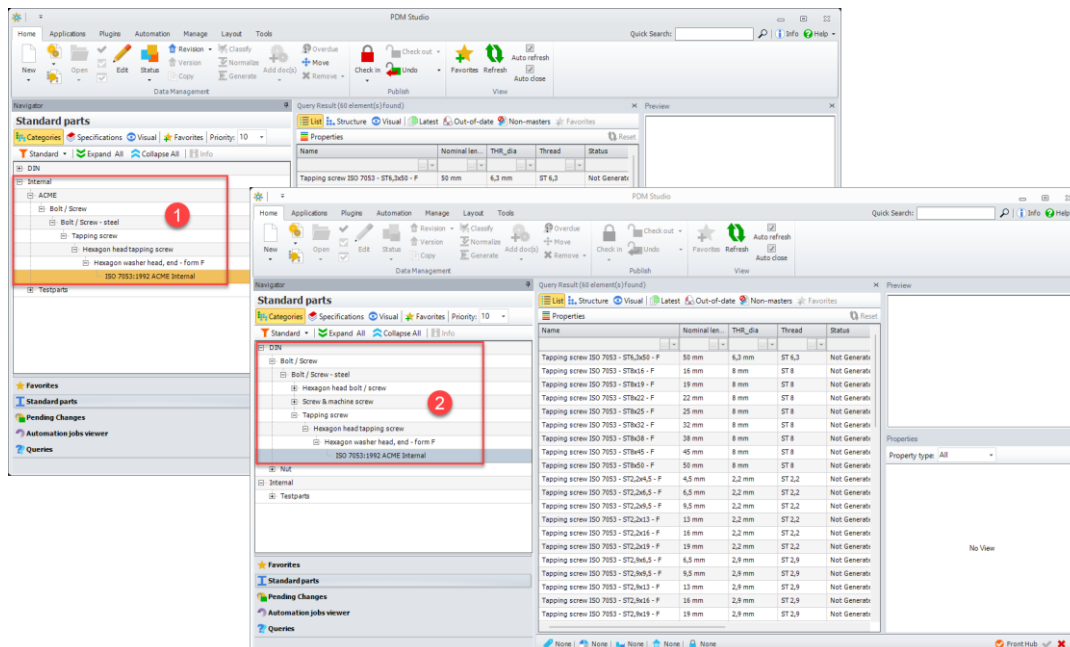
To change the category path when revising a category, first **select the category to be revised (1)** and then press the **"Revision"** command **(2)**.

The wizard for revising the category is started.



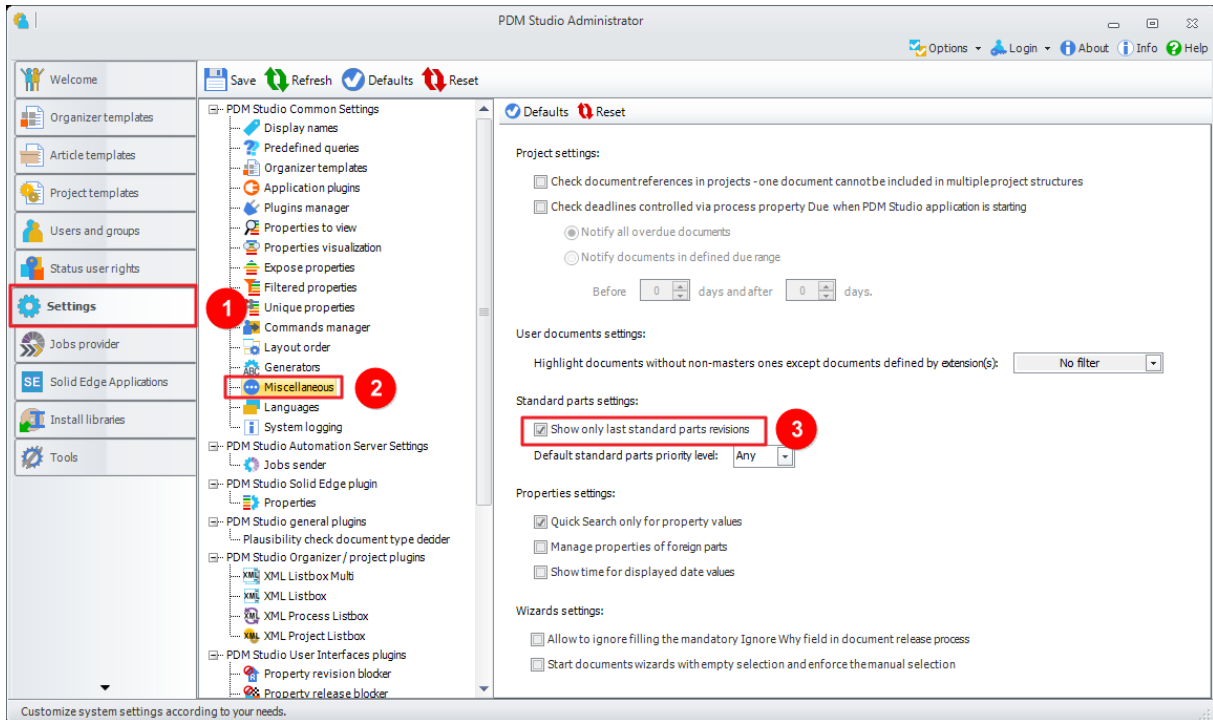
In the first step of the wizard, you must first increase the version (3). Then you can enter the new path of the revised category (1), change the description (2) if you like and optionally, if you want to move ALL hexagon head standard parts of the category to the new category, select the new option "Move all standard parts to a new category revision" (4).

All other steps are then identical to those described in the preceding paragraph.

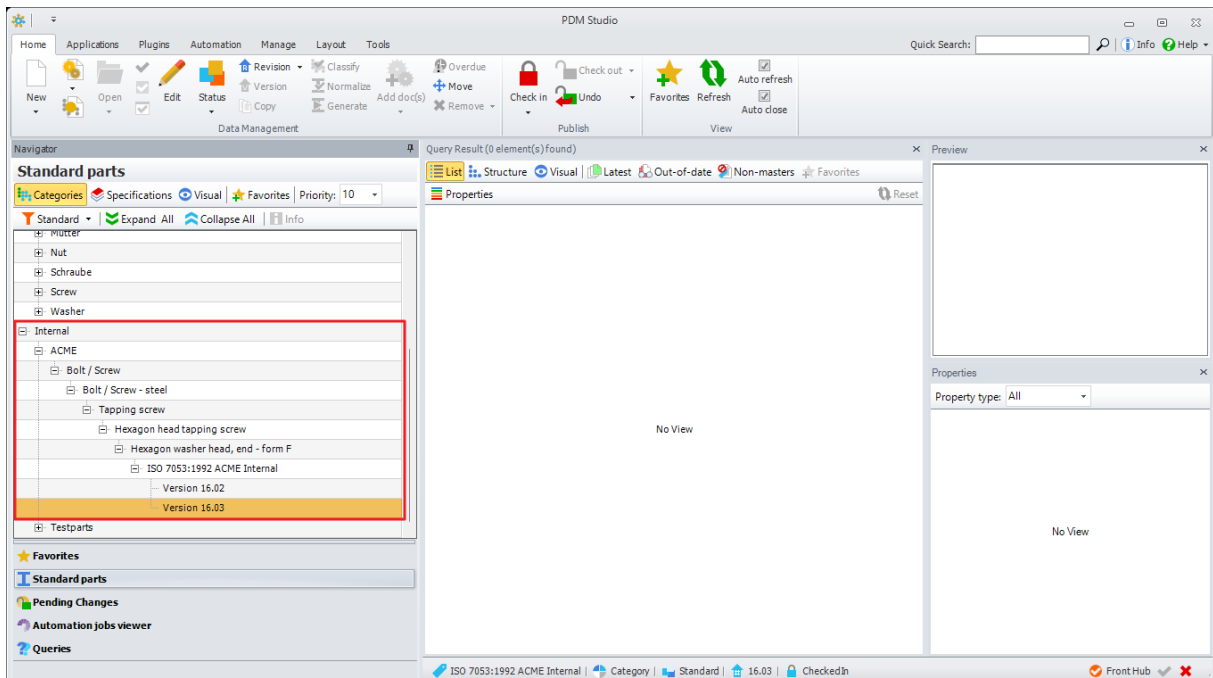


As a result, the new revision of the category has been created in the changed category path (2).

In our example, since all the default parts were taken with the operation, the category from which the revision was made disappears (is hidden) from the branch (1).



The reason the old, now "empty" category is hidden is that the Standard Parts setting in the Client Administrator is set to "Show only last standard parts revisions" (3).



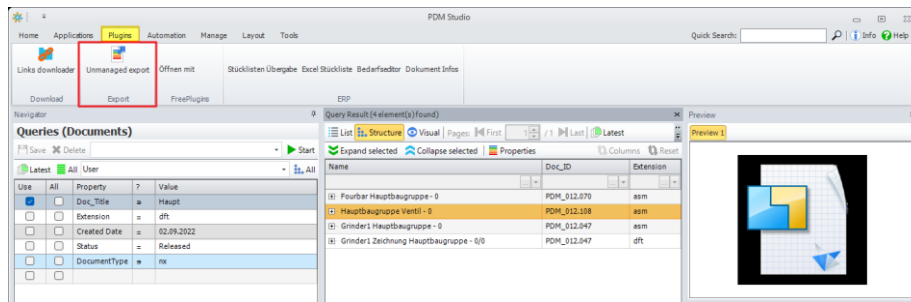
However, if the "Show only last standard parts revisions" setting is **not enabled** in the Client Administrator, the previous versions (even if they are empty) are displayed in the standard parts tree. See the figure.

Added linking options for downloading structures in the optional Unmanaged Export command plugin.

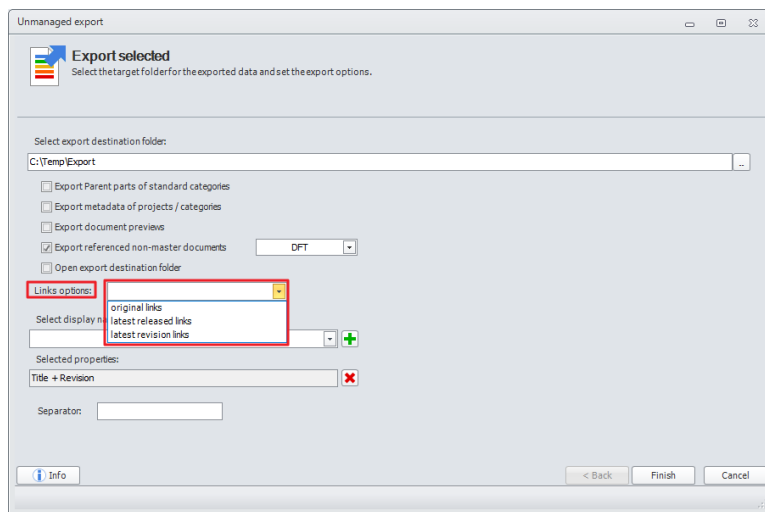
As an add-on, each Maintenance Pack comes with an "Add-on Tool". This plugin contains the function "Unmanaged export".

[How to install the plugin - see here.](#)

When the Add-on Tool is installed, the Unmanaged Export feature is available in the **Plugins tab** of PDM Studio.



After starting the "Unmanaged export" the new option "Links options" is available.



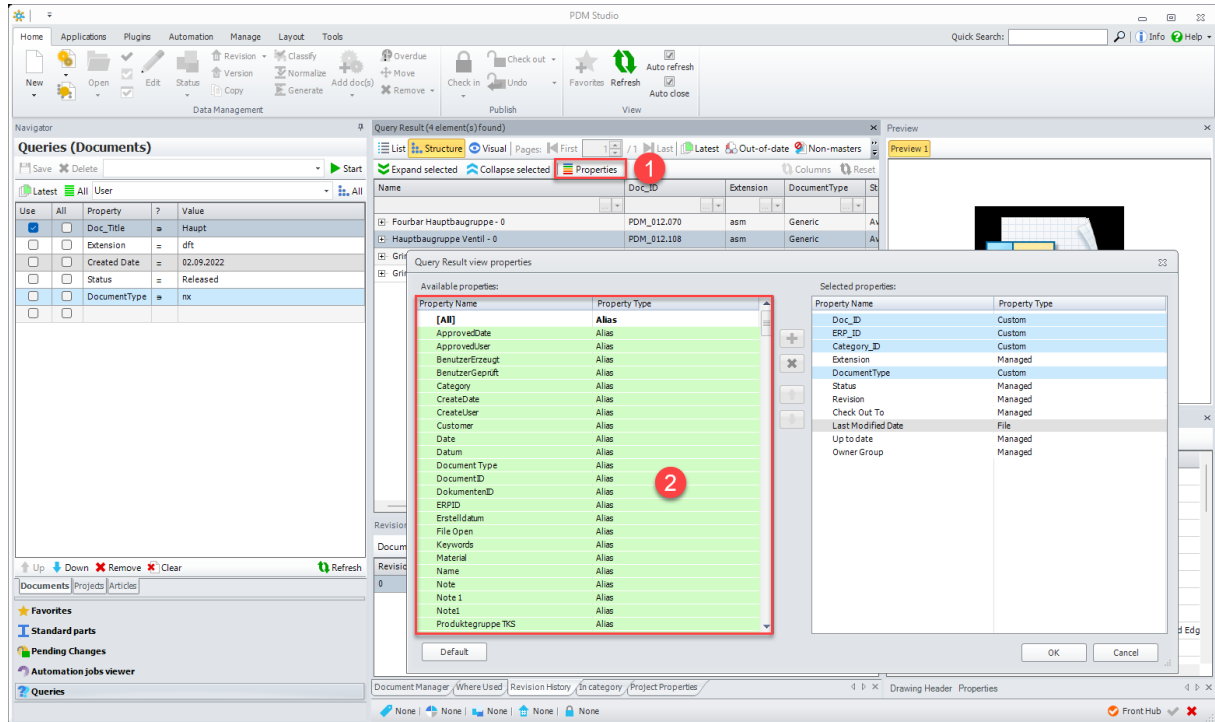
The new link options has three settings:

- **Original links** - exports the document with the original links as they were last saved in the document.
- **Latest released links** - exports the document with the links of the latest released revision.
- **Latest revision links** - exports the document with the links of the latest revision.

Note: If the document contains "inaccessible documents" (user does not have access rights to the document(s)) in the structure - the export will be aborted with an error. The error is recorded in the log.

If the document contains Pathlinks in the structure - the export will continue. The affected documents are not exported. The error is recorded in the log.

Using Aliases



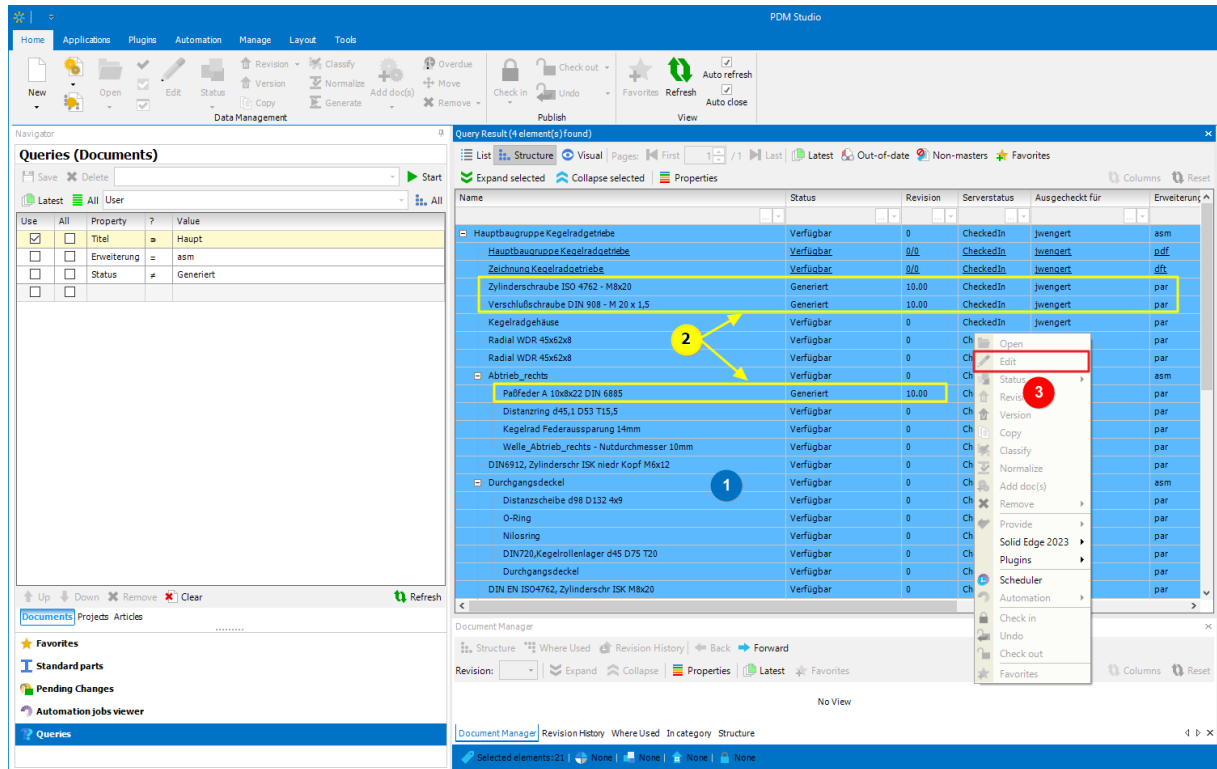
In PDM Studio, the **new alias properties** are available in the supported windows using the **Properties** button (1) (the Properties button is only active if properties customization has been enabled in the PDM Studio Administrator).

The new aliases appear as **Property Type Alias** (2) colored "Green".

Multiselection for editing in Partkeeper

With MP02 all multi editors have been revised, standardized and superfluous functions have been removed.

As a result, when multiple documents are selected in the Query Result window, only documents of the same type, e.g. user documents or standard parts, can be edited together.

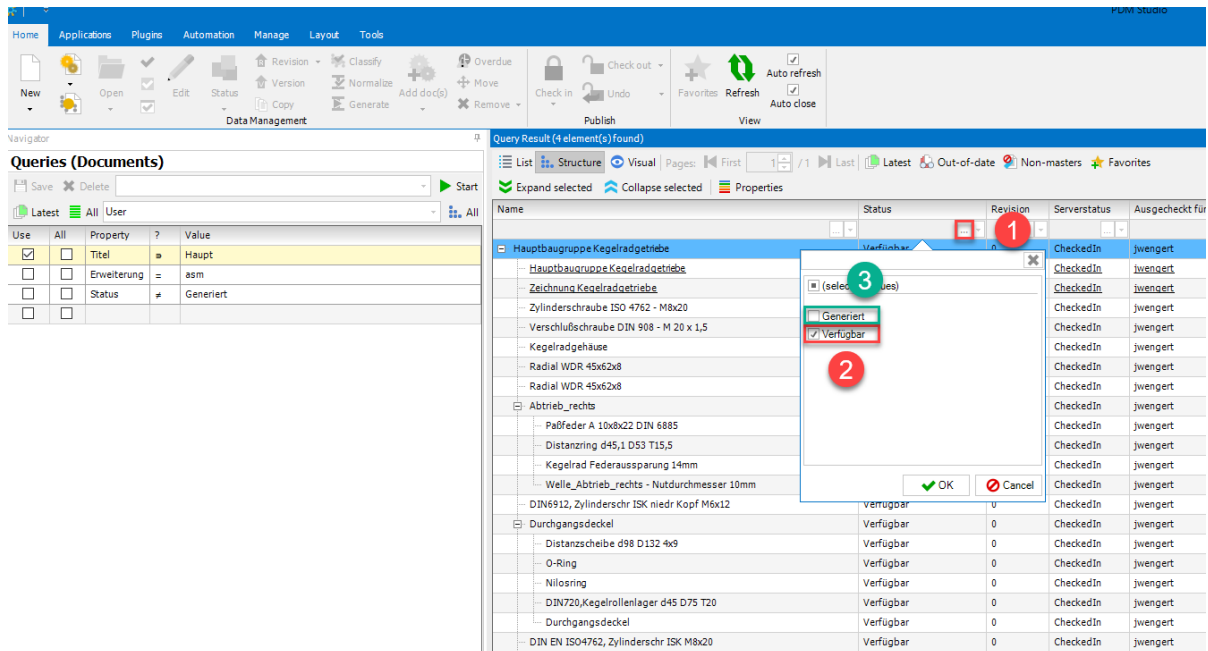


If **standard part (2)** and **user document (1)** are in **multiple selection** (standard parts are not user documents), the **edit function (3)** is "greyed out".

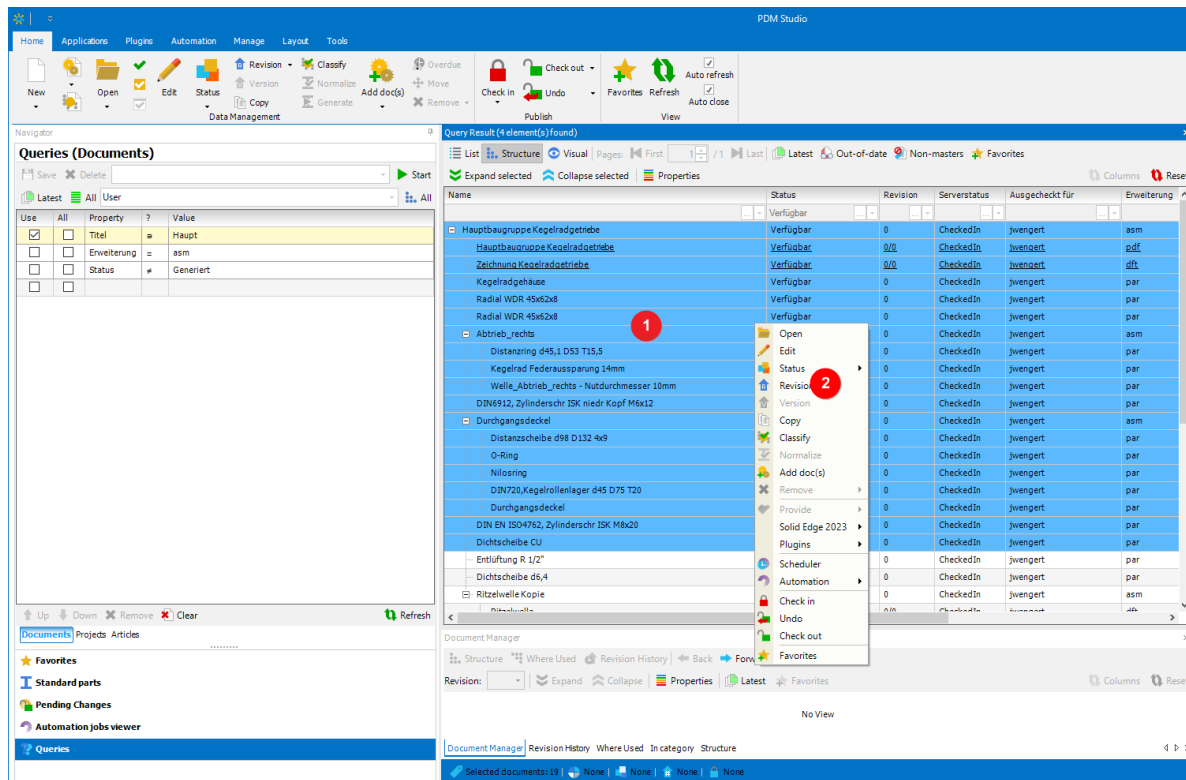
This is because there is no use case in Part Keeper for co-editing user documents AND standard parts (why edit standard parts in an assembly in multiple selection?).

Either you **edit user documents** OR you **edit standard parts**.

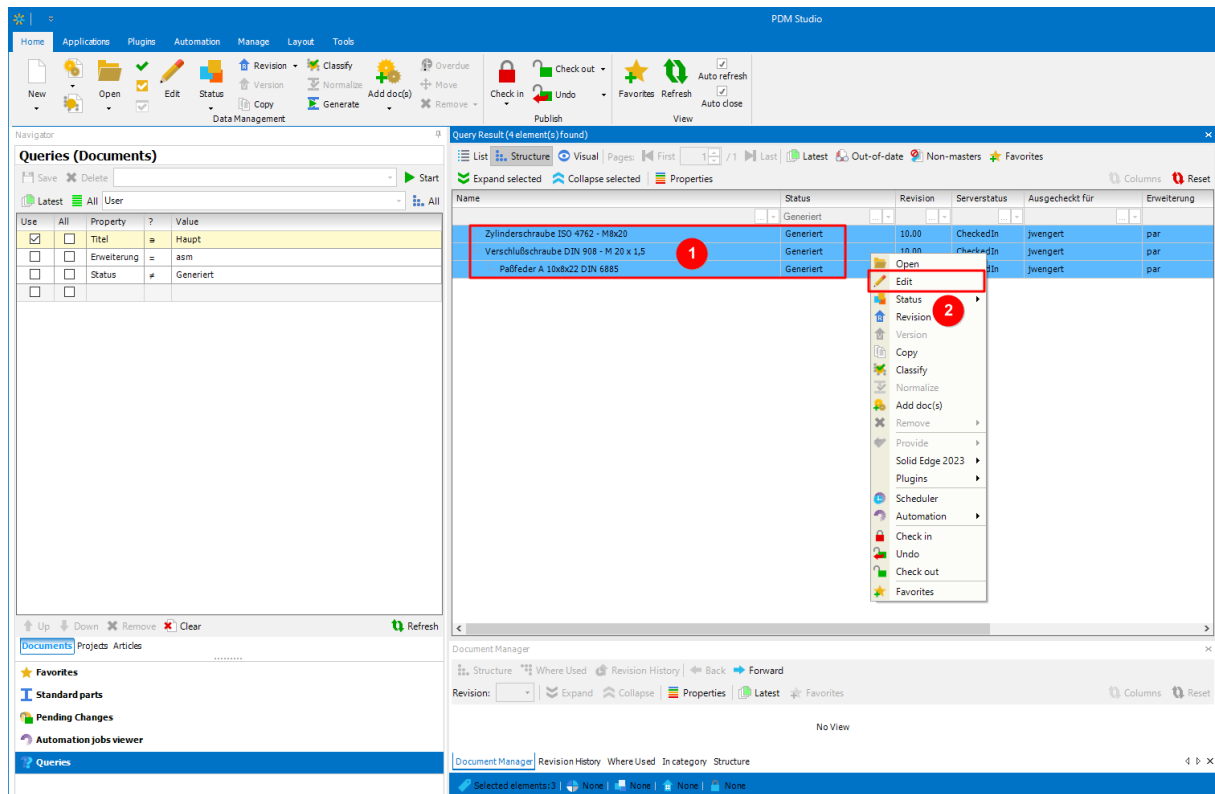
Editing of all user documents OR standard parts of a structure



In the "Query result" of the search, simply set the **desired status(es)** in the filter function (1) (2) and filter out the standard parts (i.e. the status "Generated" (3)).



The user documents can then be "Edited" (2) using the multiple selection (1).



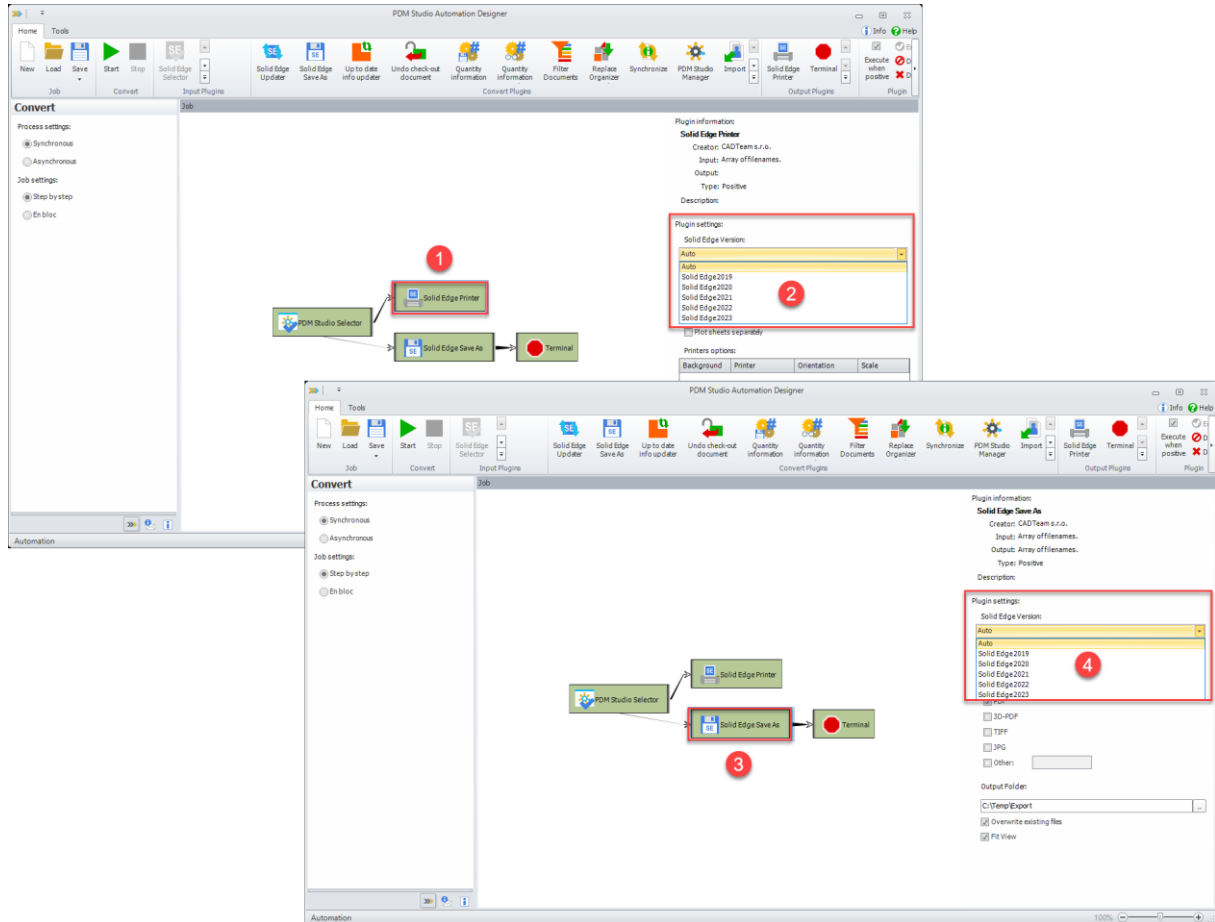
The screenshot shows the PDM Studio interface. On the left, the 'Queries (Documents)' panel is visible. The main area displays a 'Query Result (4 element(s) found)' table. The table has columns for Name, Status, Revision, Serverstatus, Ausgegeben für, and Erweiterung. Three rows are selected and highlighted in blue, with a red box around them labeled '1'. A context menu is open over these rows, with the 'Edit' option highlighted, labeled '2'.

Name	Status	Revision	Serverstatus	Ausgegeben für	Erweiterung
Zylinderschraube ISO 4762 - M8x20	Generiert	10.00	CheckedIn	jwengert	par
Verschlußschraube DIN 908 - M 20 x 1,5	Generiert		CheckedIn	jwengert	par
Paßfeder A 10x8x22 DIN 6885	Generiert		CheckedIn	jwengert	par

With the filter reversed (select "Generated" only), the standard parts can be "Edited" (2) via the multiple selection (1).

PDM Studio Automation Designer

Added "Auto" option for Solid Edge and SOLIDWORKS plugins



A new "Auto" option (2,4) has been added to the Automation Designer for the "Solid Edge Save As" (3) and "Solid Edge Printer" (1) workflow plugins.

This new option automatically selects the Solid Edge version installed on the Automation Server machine.

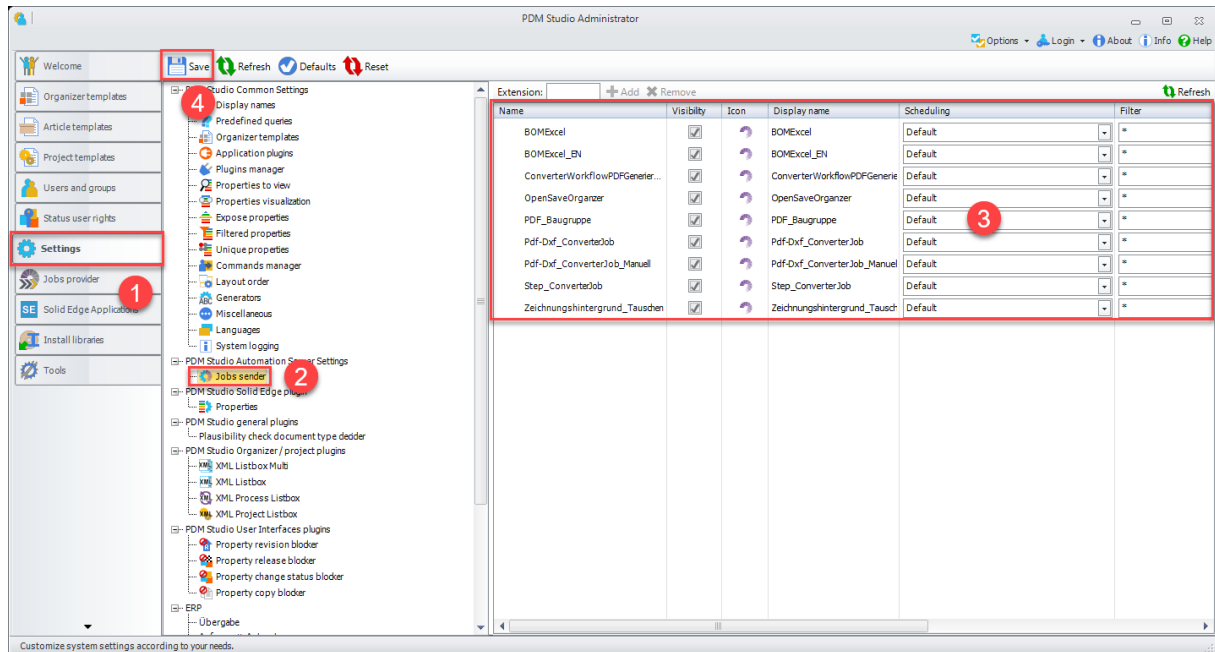
This eliminates the need to manually adjust the Solid Edge version in the plugins when updating to a newer version of Solid Edge.

Note: The SOLIDWORKS "Print" and "Save As" workflow plugins also provide the same "Auto" settings.

PDM Studio Automation

In MP02, some changes have been made to the substructure of the PDM Studio Automation module. As a result, **modified or existing automation workflows** may initially appear as **inactive** (not selectable) in PDM Studio.

Therefore, in this case, it is necessary to save the Client Administrator settings again.



To resolve this issue, **exit PDM Studio**.

Then **launch the PDM Client Administrator application** and go to **"Settings" (1) > "Job sender" (2)**.

In the Automation Workflows that appear, **check that ALL the "Workflows" (3)** that you have set up are displayed. Then click on **"Save" (4)**.

Close the "Automation Server" application and restart it.

Then start PDM Studio. The modified workflows should now appear as **"Active"** (selectable).

Solid Edge

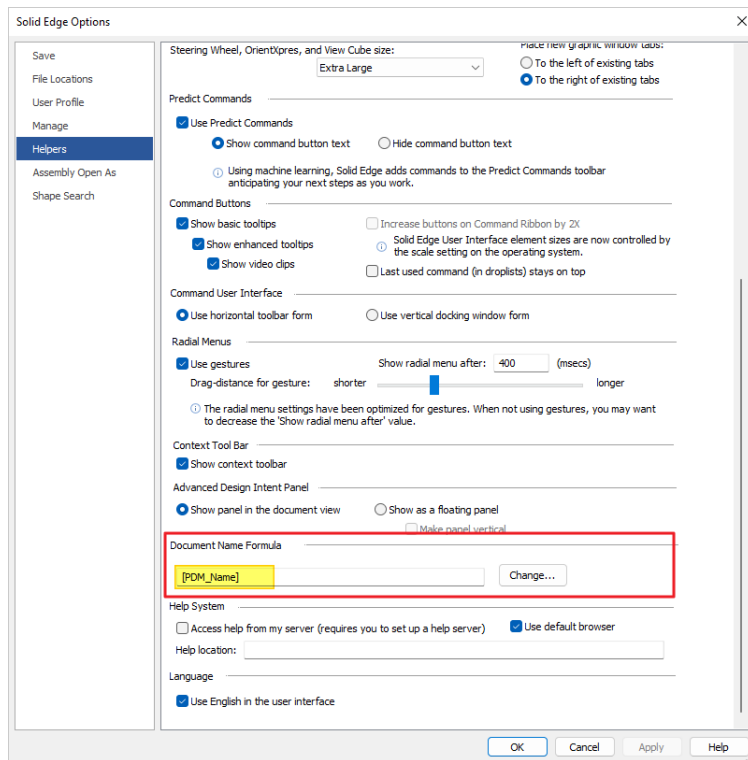
Expose display names

To use the new exposed property in Solid Edge (it is selectable in the Solid Edge options), it must first be added to a document in Solid Edge.

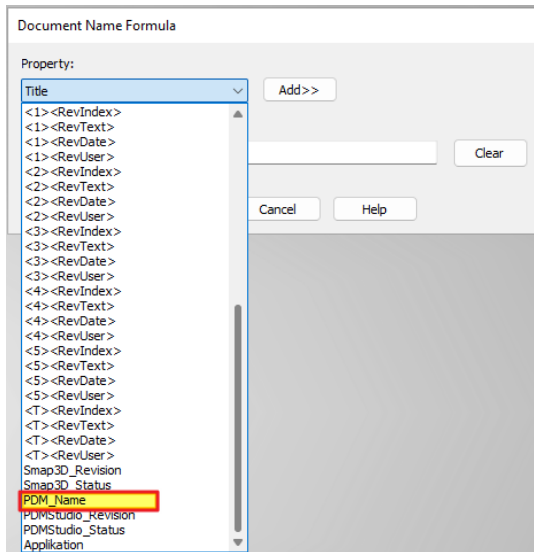
Important: The new "Exposed display name" property is only written to the Solid Edge document if the document is opened once from PDM Studio and saved back to the PDM system. Once this is done, the new property can be selected in the Solid Edge options for the first time.

To do this, open an "Available" document from PDM Studio in Solid Edge and save it using the "Check In/Out" function from the PDM Studio tab of the Solid Edge ribbon.

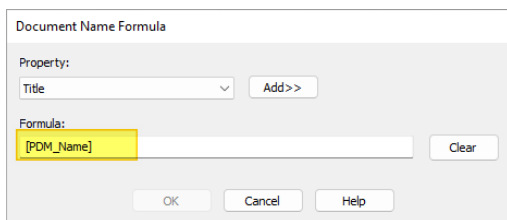
Then go to the Solid Edge Options and select the "Helpers" menu item.



In the "Helpers" tab go to the "Document Name Formulas" menu item and select the "Change" button.

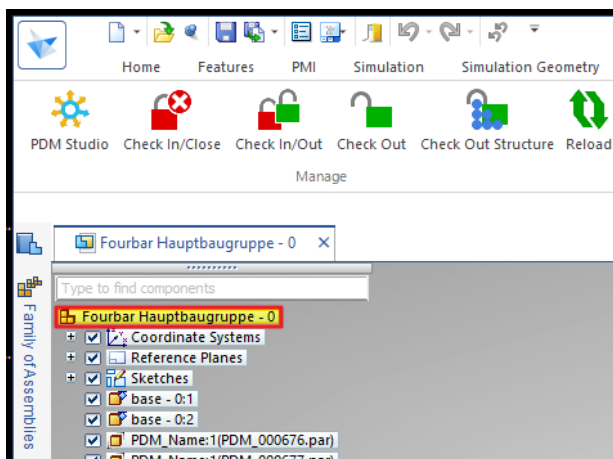


Now select the new exposed property (**PDM_Name** in our example). Then click the "Add >>" button.



The newly revealed property is now entered in the **Formula** field. Click "OK" to apply the new setting.

Then click "Apply" in the Solid Edge options and close the options with "OK".

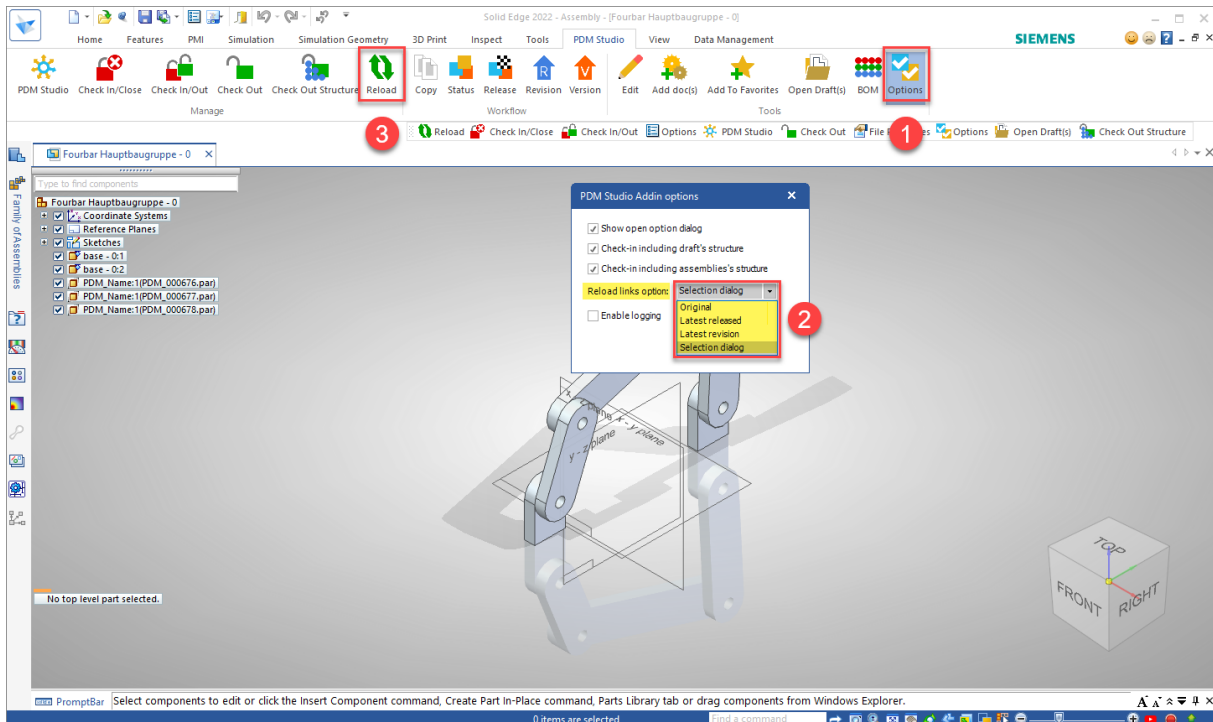


The Solid Edge Pathfinder now displays the value of the new property (in our example, "DOC_Title & Revision").

Note: If the new "Exposed Property" is selected in the Solid Edge Options, it will be written to the documents you edit or create when you use the PDM "Check In/Out" or "Check In/Close" functions and will be visible in the Solid Edge Pathfinder.

Select the **Reload Link Options** option for the **Reload** command on the Solid Edge PDM Studio ribbon.

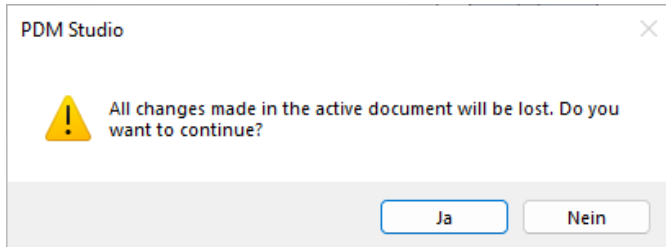
The **Reload** command (3) was used to overwrite the changes made to the files and their structure in the local cache only with the saved versions of the files that were checked in and stored on the PDM Studio server (Data Storage).



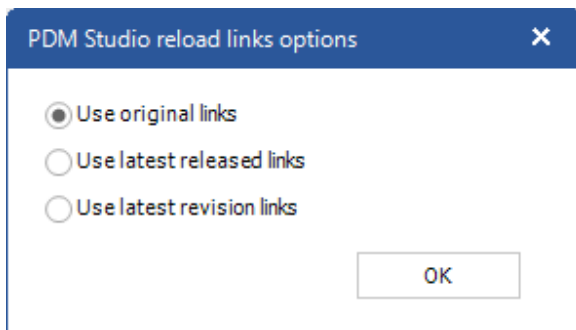
With MP02, this function has been enhanced. In PDM Studio "Options" (1) in the Solid Edge PDM Studio toolbar, the new function "Reload link options" (2) has been introduced with four possible options.

- **Original** - the document will be loaded with the original links as they were last saved in the document.
- **Last released** - the document will be loaded with the links of the last released revision.
- **Last revision** - the document will be loaded with the links of the last revision.
- **Selection dialog** - you can always choose which of the three previous options you want to select.

If the "**Selection dialog**" option is selected in the options, the following warning appears after selecting the "**Reload**" command (3):



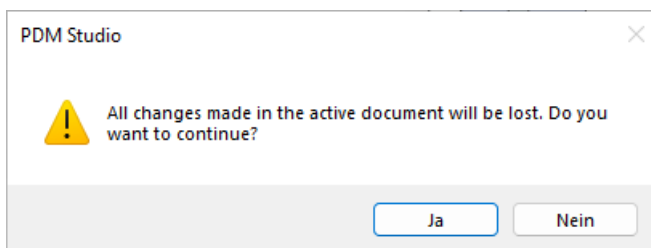
Confirm with "**Yes**" and the following dialog will appear where the user can manually select the desired link option.



The command can be canceled at any time by clicking on the **close icon "X"** of the selection dialog.

The command is only executed by clicking the "**OK**" button.

If you have selected "**Original, Last released, or Last revised**" instead of "**Selection dialog**" in the PDM Studio options in Solid Edge, you will see the warning message **immediately** after selecting the "**Reload**" function (3) before the operation completes.



If you confirm with "**Yes**", the operation will be performed immediately.

Other (Technotes)

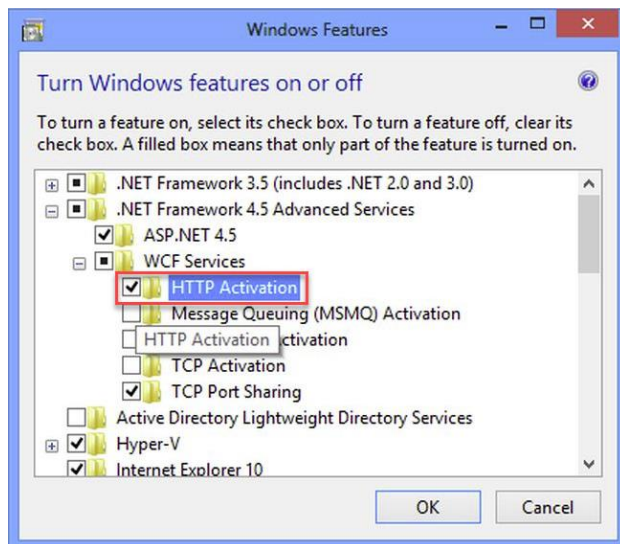
General

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:



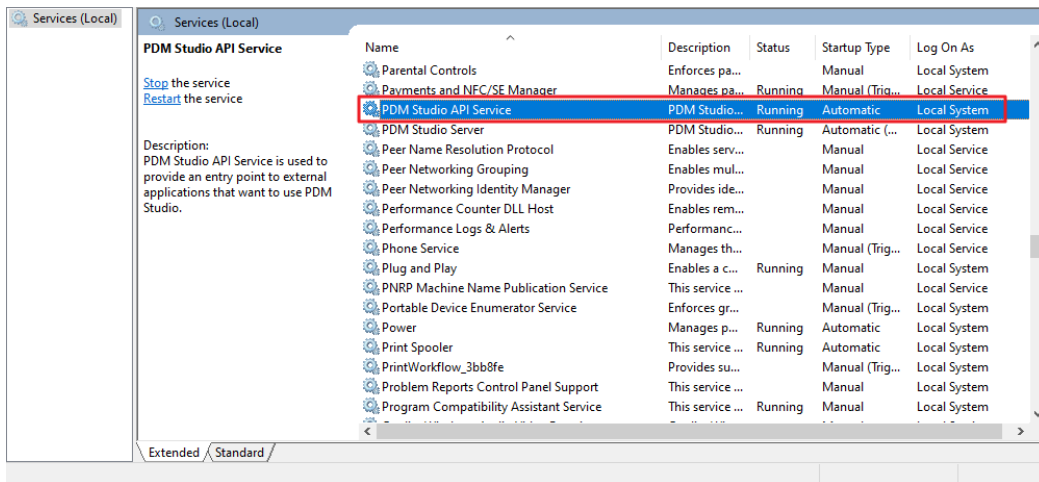
If the **Microsoft .NET Framework 4.8** is installed, go to the **Windows Features** in Windows Settings, and open the "Turn Windows features on or off" settings.

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

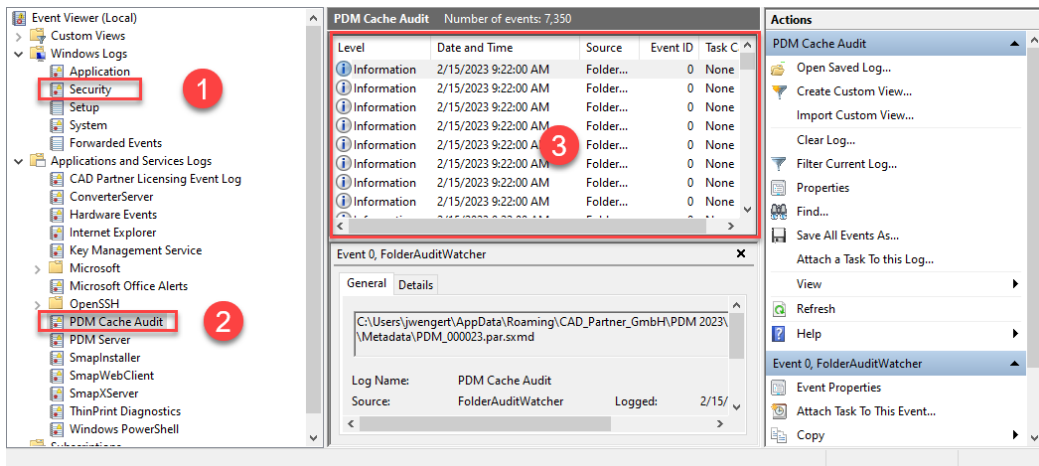
After that, all PDM application should work again without problems.

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.



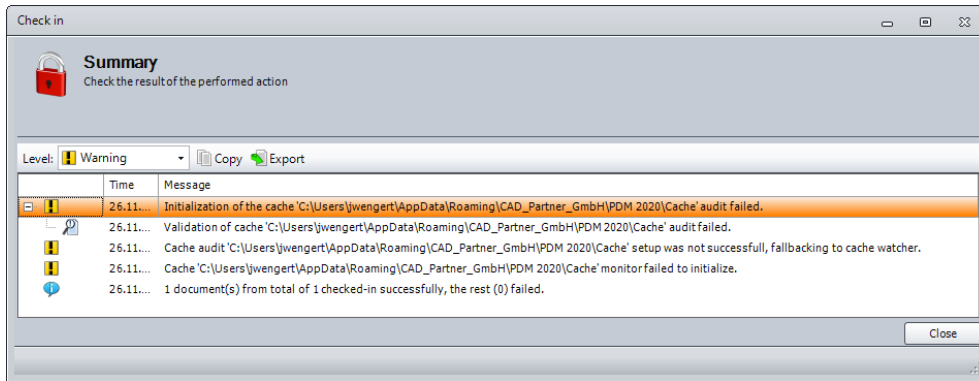
The most important point is that the PDM Studio API service **MUST** have access to the "Security" event log (1).

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 PDM Cache security event log is only accessible with elevated privileges ("Administrator"), which PDM client applications normally do not have

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

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



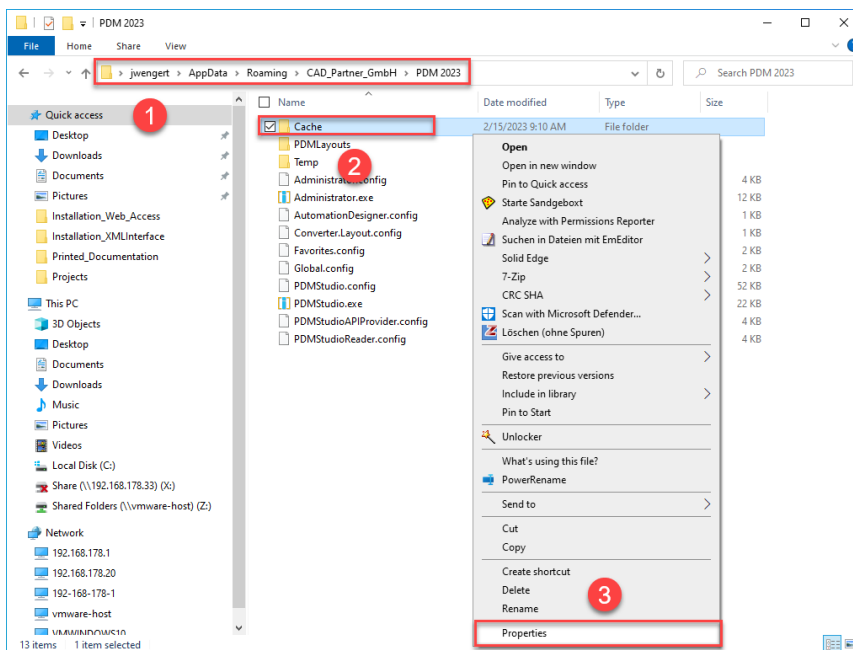
Important: This is because the company's security policy cannot be changed directly from the workstation, but is controlled globally by IT.

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

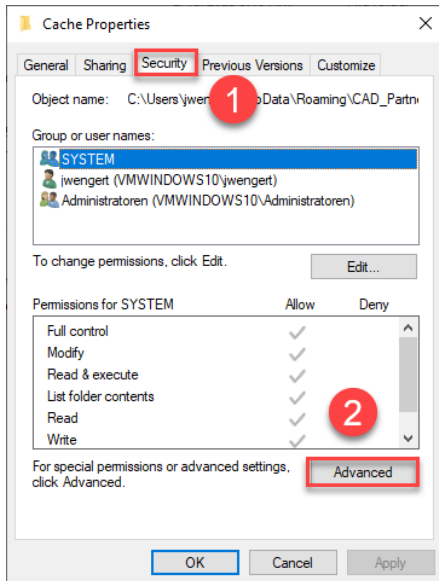
If this happens, check the following Windows settings.:

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

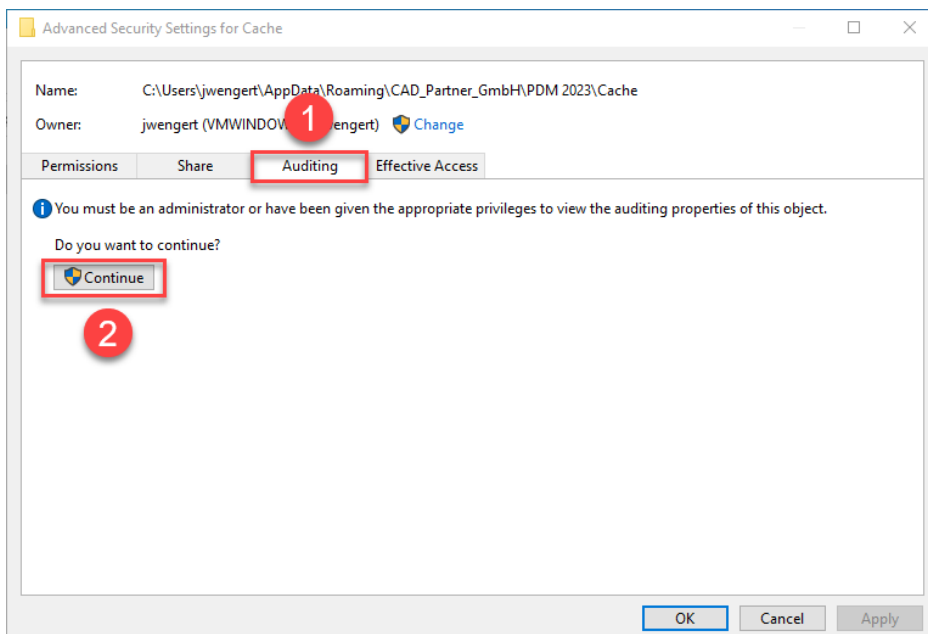
Usually: "C:\Users\[User]\AppData\Roaming\CAD_Partner_GmbH\PDM 2023"



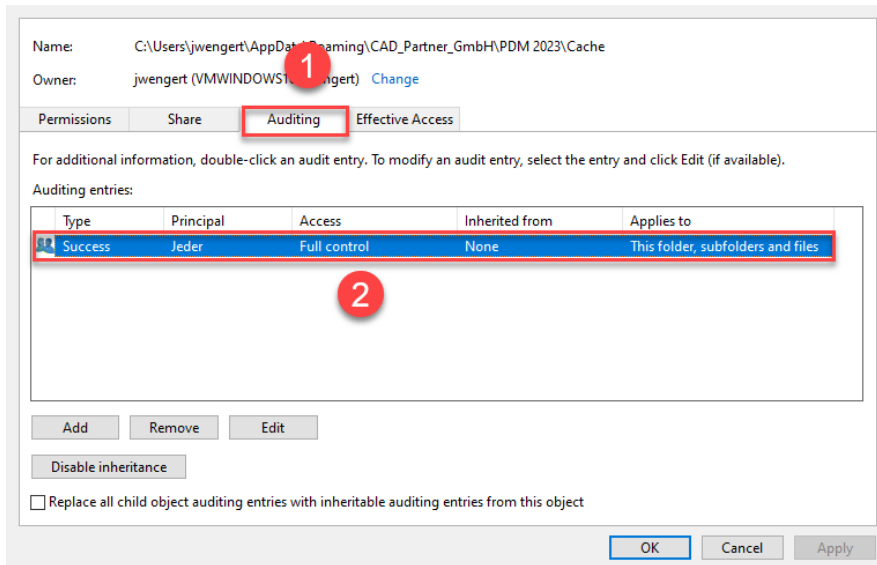
Right-click on the "Cache" folder (2) and select the "Properties" (3).



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

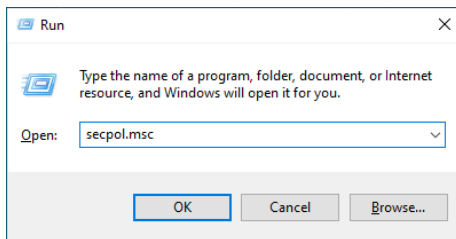


In the "Advanced security settings" of the cache directory, select the "Auditing" tab (1) and then click Continue (2).



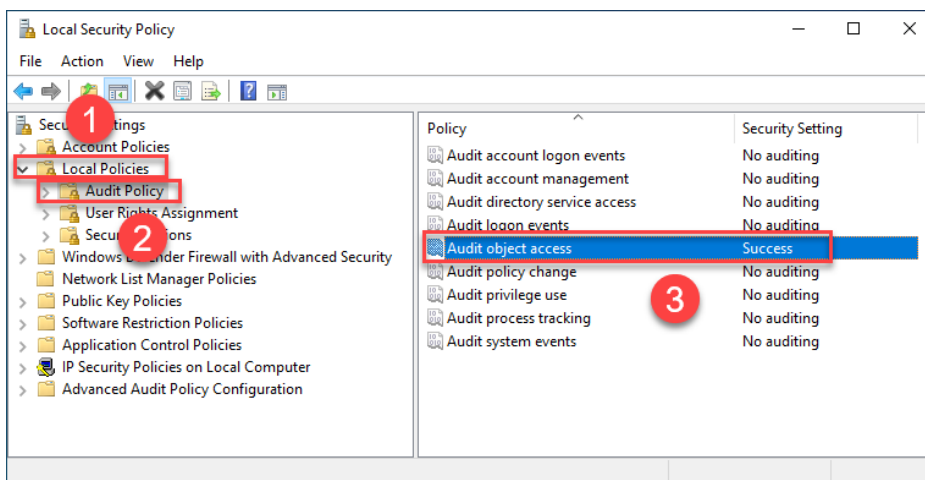
Go to the "Auditing" tab (1). In order to be able to monitor successful access to the cache folder and all its subfolders and files, "Full control" (2) over this folder and all its subfolders and files **MUST** be configured for everyone without any restrictions. If this is the case, then everything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

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

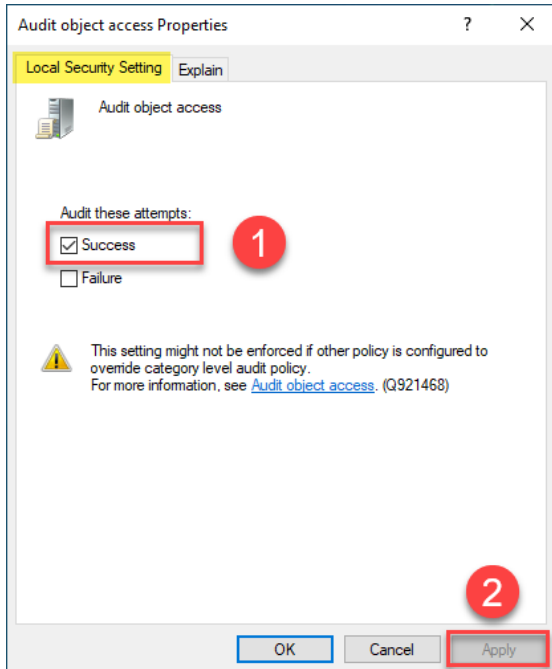


Then enter the command "secpol.msc". The Local Security Policy will be started.

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



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



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

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

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

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

Disabling cache monitoring

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

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

Installation

Plugins in general:

Some words about custom plugins, specially written for you.

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

After Installation

General

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

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

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

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

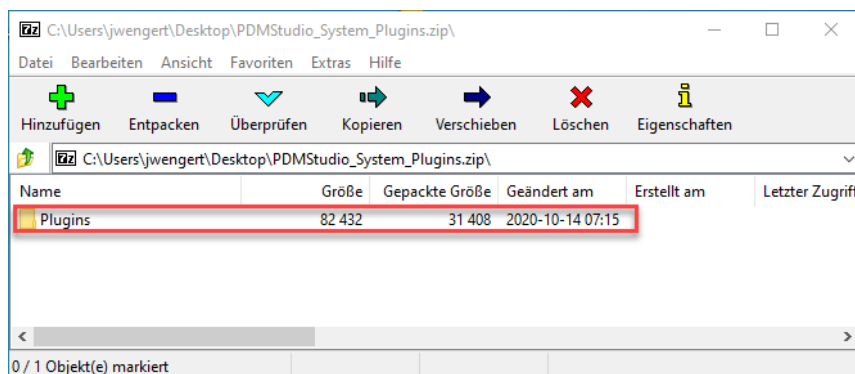
For more information on installing the Free- and Freeconverter plug-ins, refer to the Installation Plugins chapter in the "PDMStudio_Installation_2023_EN.pdf" document.

Add - Add-On Tools

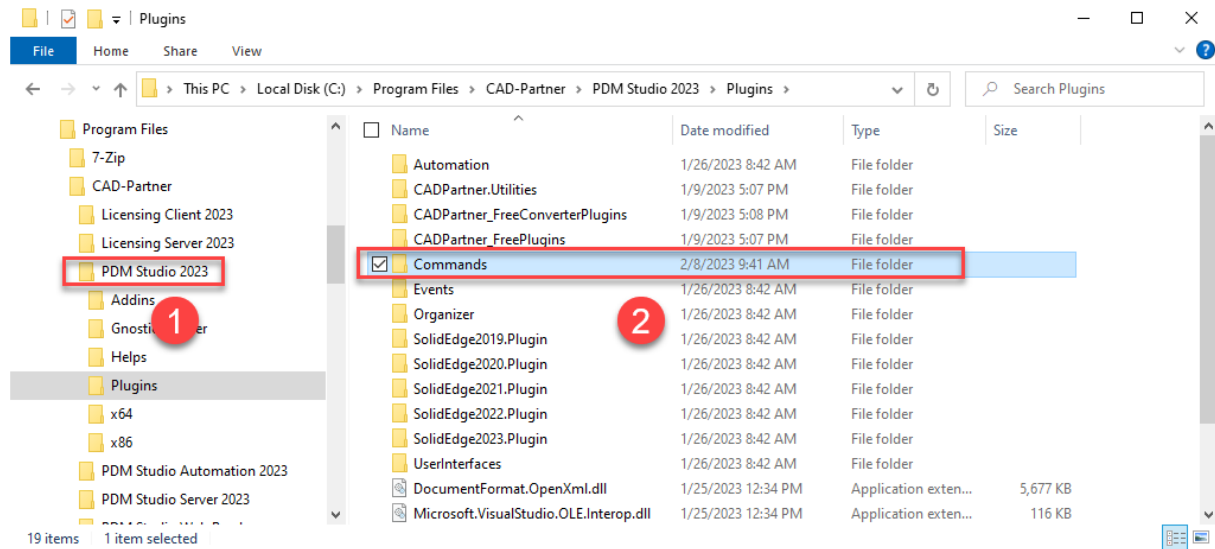
The "Unmanaged Export" function is not included in the installation package of the standard software and must be installed separately after installing the 2023 version.

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

Open the zip file.



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



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

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

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

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

The feature is now available.

Client Tools

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

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

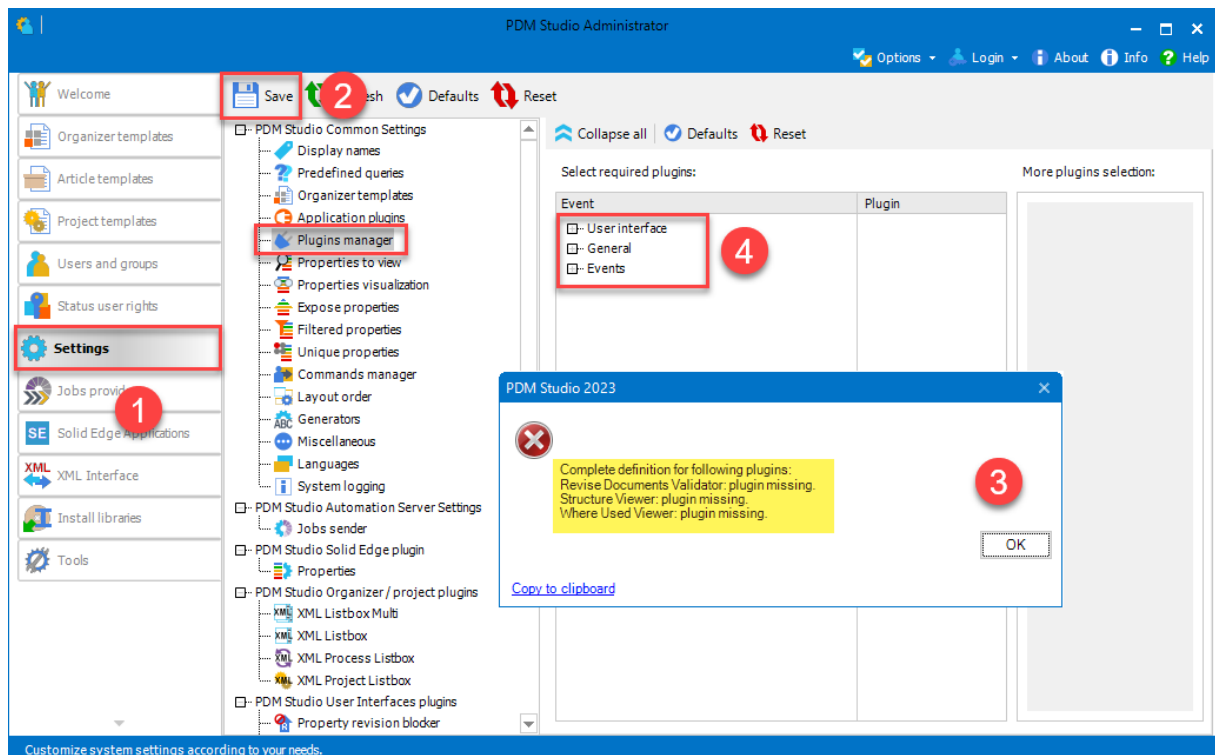
Note: The "SmapX.Client.Tools.dll" contains functions specific to your company's PDM Administrator. Therefore, it must be copied ONLY once to the PDM Administrator's computer. If you need to use these special functions - our support will inform you.

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

Setup Client Administrator

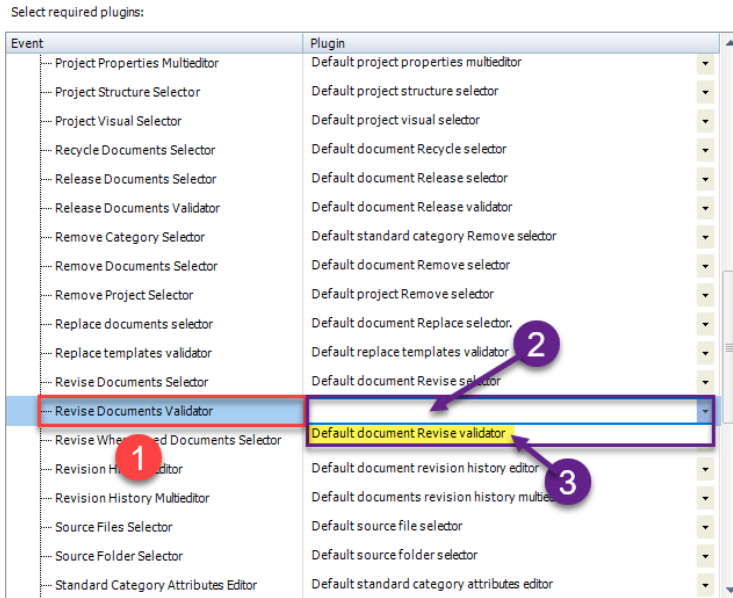
Each installation may also bring new settings to the Client Admin. You will need to manually configure these settings.

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



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

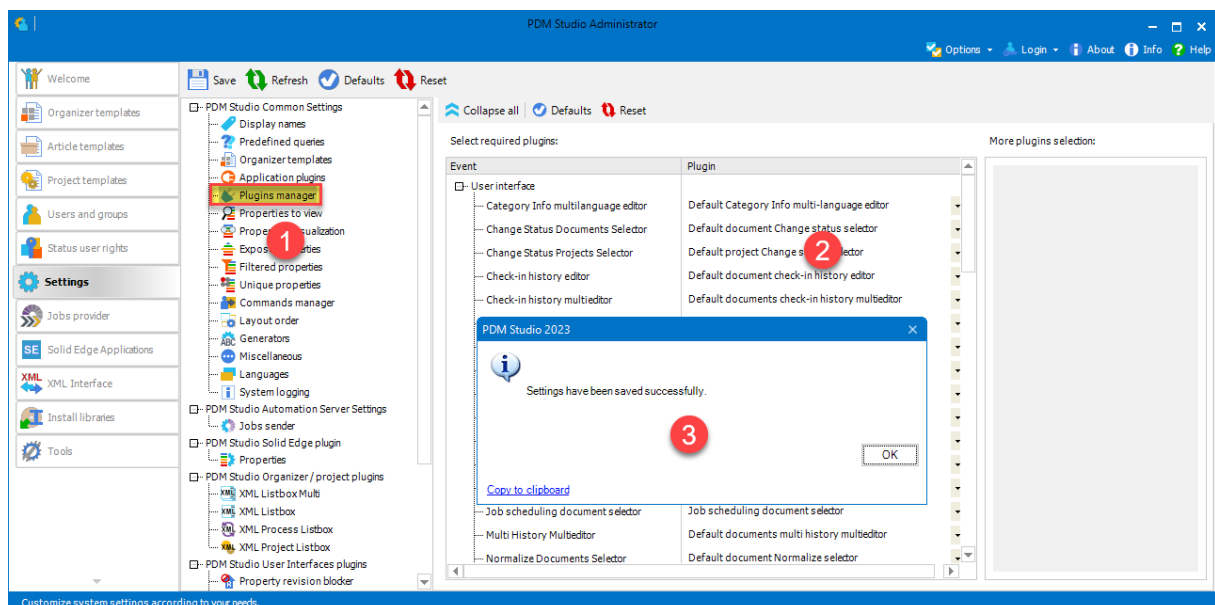
Expand the Event where the Plugin is located, in our example "User interface" and scroll down until you see the mentioned Plugins (image above (3)) "Release Documents Validator" (image below (1)).



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

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

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



Other enhancements/improvements/changes/fixes/bugs

Enhancements:

Module	Description
MS Office integration	Added support for MSO Excel xslm files.
Client Administrator	Introduced a new 'Change Owner Group' permission.
PDM Studio	Introduced displaying aliases from Organizer templates in PDM Studio panels.
PDM Studio	Checked-in event is also fired for document check-in process via API without displaying the Check-in wizard and also during starting a wizard for checked-out document.
PDM Studio	Check entire document structure for obsolete documents' command in Query Result panel works also for projects, articles and folders.

Improvements:

Module	Description
Automation Server	Improved performance of getting Automation jobs from the Automation Server.
Automation Server	Automation Server enhanced with possibility to detect who is locking queue files.
Client Administrator	Added mining of Organizer templates referenced in shared client settings.
Client Administrator	Improved sorting of predefined queries definitions in Client Administrator Settings
Client Administrator	Added possibility to unset a general plugin in the Settings Plugin Manager.
Client Administrator	Listed permissions in User Rights and Effective Rights dialogues are sorted properly now
Event plugins	Optimized ConverterJobRunner plugin on performance when there are no plugins configured in the settings to be started for given document and given workflow.
Inventor integration	Updated Inventor integration including bug fixing.
PDM Studio	Improved performance of expanding the standard categories structure when working with priorities.
PDM Studio	Added more detailed message in the first step of Revise Documents wizard when a non-structural link is not selected for revision operation.
PDM Studio	Improved performance of clearing Automation jobs on Automation Server.
PDM Studio	Improved Classify wizard when values from original standard category characteristics are taken to the newly assigned category if there are matched.
XML Interface	Processed XMLI commands are moved into the "deleted" folder.



Changes:

Module	Description
Migration	Removed obsolete Set Status option that overrides other option.
MSO integration	Unified MSO PDM Studio Copy command with SE. Source document stays opened when copied root document should stay closed.

Repaired Bugs:

Module	Description
Automation Designer	Fixed an exception when Automation Designer is started with broken Converter.Layout.config.
Client Administrator	Fixed deleting all metadata files of an Organizer template file. Deleting of *.sxotmd file was missing that leads to issues with deleting unused Organizer templates.
General	Fixed an issue when the first general plugin from the list was started although no plugin was selected for a general plugin event.
Installation	XMLI setup: PDM settings are written only once to P&IDs PCSCAD.ini file now.
Inventor integration	Fixed closing original document when during importing document via check-in-out command.
Part Keeper	Fixed an issue with editing Part Keeper cells in properties multi-editor including consequent crashes.
Part Keeper	Exposed managed and revision properties should be displayed in unmanaged PartKeeper
PDM Server	Read permission for target status is not controlled any more in check-out operation.
PDM Server	Running database is not possible to delete anymore.
PDM Studio	When a checked-out standard part is selected, the Revise Standard Part wizard is not started with displaying appropriate message.
PDM Studio	Fixed an exception in Release Document wizard validation step for Ignore command when Ignore Info has been already present. It is automatically deleted and logged as verbose.
PDM Studio	Fixed an exception in Release Document wizard validation step for specific assemblies.
PDM Studio	Fixed synchronization error when a new standard category is created during check-in standard parts or when standard part has some links.
PDM Studio	Fixed an exception when query documents tab is activated in special situation.
PDM Studio API	Fixed PDM Studio API Provider icon in task bar.
SOLIDWORKS integration	Fixed icons in SWX integration New Options dialogue.
XML Interface	OpenDocument command creates and waits for an ACK.

Imprint



CAD Partner GmbH

Am Marktplatz 7

93152 Nittendorf

Deutschland

Tel.: +49 9404 9639-21

Fax: +49 9404 5209

info@CADPartner.de

<https://www.pdm-studio.tech/>

© 2023 CAD Partner GmbH. All rights reserved.

This document is protected by copyright. The content of this document is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by CAD Partner GmbH.

Information in this document has been carefully checked; CAD Partner GmbH assumes no responsibility or liability for any errors or inaccuracies that may appear in the informational content.

PDM Studio is a Trademark of CAD Partner GmbH. All other names, registered trademarks and product names are used herein are the property of their respective holders.