

PDM Studio

What's new 2023 |EN| MP 03

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Introduction

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

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

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

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

"PDMStudio_Installation_2023_EN.pdf"

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

Licensing 2023

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

Supported Operating Systems:

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

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

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

Update Licensing Version 2023

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

The new Cadpartner V2023 Licensing will be automatically installed during the installation of PDM Studio V2023 MP03.

Installation

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

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



PDM Studio Server Administrator

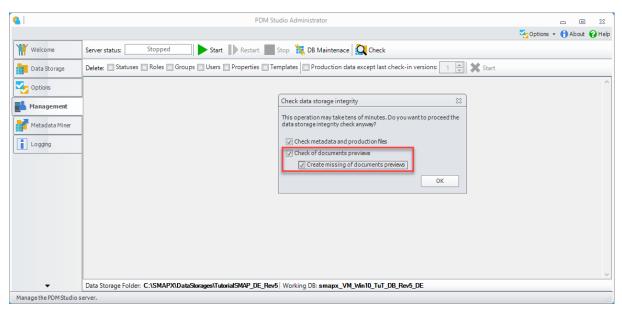
Check and fix missing previews

For some documents, the previews in PDM Studio may not be displayed. For this reason, a new maintenance tool has been integrated into the PDM Studio Server Administrator, which can be used to check and correct the previews in the data storage.

4	PDM Studio Administrator		- 0	23
		🋂 Options 👻	🕇 About	🕜 Help
Welcome	Server status: Stopped Restart Stop 🐂 DB Maintenace 🔍 Check 2			
Data Storage	Delete: 🗋 Statuses 📄 Roles 🗋 Groups 🛄 Users 📄 Properties 📄 Templates 📄 Production data except last check-in versions: 🔢 👘 🗱 Start			
Options				^
Management	1			
Metadata Miner				
Logging				
				~
-	Data Storage Folder: C:\SMAPX\DataStorages\TutorialSMAP_DE_Rev5 Working DB: smapx_VM_Win10_TuT_DB_Rev5_DE			
Manage the PDM Studio s	erver.			

The new function has been integrated into the "Check" command (2) in the "Management" tab (1). To use the "Check" function, the PDM Server must be in the "Stopped" state (3).

After you run the "**Check**" function, the "**Check data storage integrity**" dialog box gives you the option to enable the new feature when checking the data storage.







The new "Check of documents previews" option (1) checks the data storage for missing previews.

The sub option "Create missing of documents previews" (2) corrects missing thumbnails.



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

Click "OK" to start the scan.

4	PDM Studio Administrator	_ 0 %
		🌄 Options 👻 🎁 About 🚱 Help
Welcome	Server status: Stopped 🛛 🕨 Start 📗 Restart 🔤 Stop 🙀 DB Maintenace 🞑 Check	
Data Storage	Delete: 🗌 Statuses 🗋 Roles 🗋 Groups 🗋 Users 📄 Properties 📄 Templates 📄 Production data except last check-in versions: 🗌 🏩 🛠 Start	
Options	Starting corrupted file check on server folder 'C:\SMAPX\PataStorages\TutorialSMAP_DE_Rev5'.	^
Management		
Metadata Miner	PDM Studio	
Logging	Checking storage O 38% Checking metadata files	
	Checking data stream files	
	Checking alias files	
	Checking preview files	
		V
Manage the PDM Studio s	Data Storage Folder: C:\SMAPX\DataStorages\TutorialSMAP_DE_Rev5 Working DB: smapx_VM_Win10_TuT_DB_Rev5_DE	

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

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

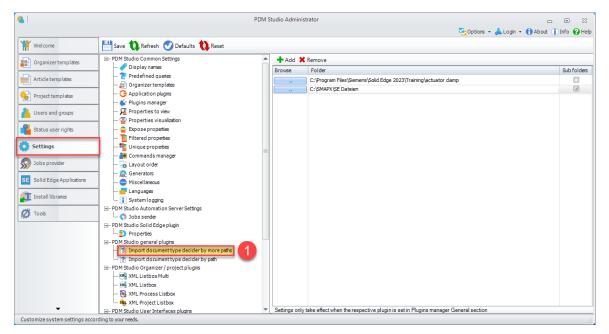
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PDM Studio Client Administrator

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

The new setting "Import document type deciders by more paths" (1) has been added to the PDM Studio Client Administrator in the "Settings > PDM Studio general plugins" section.



This can be used to determine whether the **document type** in the specified folders is automatically detected during the plausibility check and then imported either as a **user document** or as a **standard part**.

۹.			PDM Studio Administrator	_	- 0 %
Welcome	💾 Save 🔃 Refresh 🥑 Defaults 🔃 Reset			9 <mark>0</mark> 01	otions 🝷 📥 Login 👻 🚹 About 👔 Info 💡 Help
Welcome Comparizer templates Comparizer templates Comparizer templates Comparizer templates Comparizer templates Comparizer and groups Comparizer and gro	PDM Studio Common Settings Display name Display name Production plays Properties to wor Properties Propertie		Collapse all X Remove O Defaults () Re Select required plugms: Event G- User interface G- General Clever import compare - ERP Process properties - ERP Process properties - ERP Project properties - ERP Project properties - ERP Project properties - ERP Project properties - ERP programmed and the select - Filename Generator - Log Exportes - Migration Identity selector - Organizart template up dater	Plugin Default Clever import comparer (full path)	More plugins selection:
	□-PDM Studio general plugins □-Bit Monto document type decider by more paths □-Bit Monto document type decider by path □-PDM Studio Organizer (project plugins □-Mit Listbox Mub □-Mit NHL Listbox □-Mit NHL Neroses Listbox		Project Filename Generators Revision initializer Revision interpreter Revision interpreter Events	Impot document type dedder by more paths Import document type dedder by path Solid doge revision installaar Default revision interpreter -	2
Customize system settings accord	L. Ru, XML Project Listbox D. PDM Studio User Interfaces plugins	•			

To activate the new feature, you have to change the general plugin "Plausibility check document type decider" (1) in "Settings > Plugin Manager > General" to the plugin "Import document type decider by more paths" (2) in the Plugins Manager of the Client Administrator and save it.

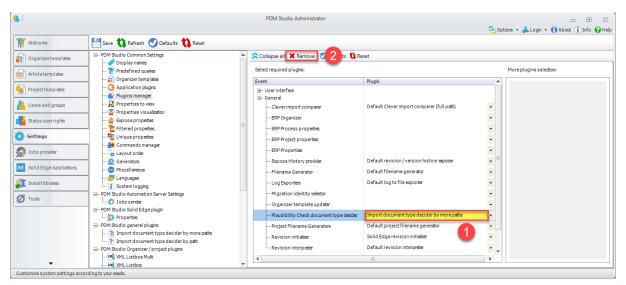


(4)	PD	2DM Studio Administrator 👝 🖸	• **
		🌄 Options 👻 📥 Login 👻 🕕 About 🕕 Inf	ifo 🕜 Help
Welcome	💾 Save 🔃 Refresh 🥑 Defaults 🔃 Reset		
Organizer templates		Add X Remove	
Article templates	Predefined queries Organizer templates	C:\Program Files\Siemens\Solid Edge 2023\Training\actuator damp	Sub folders
Project templates	O Application plugins With the second seco	C:\\$MAPX\\$E Dateien	
Users and groups	- <u>2</u> Properties to view - <u>2</u> Properties visualization	3	2
Status user rights			
Settings	🏙 Unique properties		
Jobs provider			
SE Solid Edge Applications	🙀 Generators 😳 Miscellaneous		
Install libraries	Languages		
💋 Tools	□ PDM Studio Automation Server Settings □ ↓ Jobs sender		
	□ PDM Studio Solid Edge plugin □		
	⊡- PDM Studio Organizer / project plugins		
	XML Listbax XML Process Listbax		
-		 Settings only take effect when the respective plugin is set in Plugins manager General section 	
Customize system settings accor			

Use "Add" (1) to select the standard parts folder. If the folder is not specified, all unmanaged documents are imported as user documents.

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

Use the "Remove" button (1) to remove the folder entry from the list.



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



PDM Studio

New possibility to remove category from visual navigation tree

※	PDM	l Studio					
Home Applications Plugins Automation Manage Layout Tools						Quick Search:	🔎 🍳 Info 🚱 Help 👻
	move Check in Undo Favorites Re	Auto refre fresh Auto clos					
Navigator	Schraube und,			×	Preview		×
Standard parts	Elist : Structure 💿 Visual 🕒 Latest 🔬 Ou	it-of-date 👰 N	lon-masters 🛊	Favorites]
the Categories Specifications Visual 2 ites Priority: 10 -	Properties			🚯 Reset			
Path: 🛰 Categories 🔸 Schraube 🕨 🕞 🕀 🕀	Name	Material	Oberfläche	Status			
T Standard - D Info							
	Wuerth_006721020_DIN_961_Stahl_8.8_blank_Fei		Blank	Generiert			
	Wuerth_006721016_DIN_961_Stahl_8.8_blank_Fei		Blank	Generiert			
DIN 961 Stahl 10.9 DIN 961 Stahl 8.8 blank 4017: 1999	Wuerth_006721025_DIN_961_Stahl_8.8_blank_Fei	Stahl	Blank	Generiert			
verzinkt Feingewinde Feingewinde							
Kopfridhe Schraube mit Gewinde							
					Properties		×
					Property type:	All +	
					Property	Value	Category
					Ausgecheckt für	jwengert	Verwaltet
					Besitzer	jwengert	Verwaltet
					Besitzergruppe		Verwaltet
					Kategorietyp	Standard	Verwaltet
					Revision	1.00	Verwaltet
					Serverstatus	CheckedIn	Verwaltet
					Status	Standard	Verwaltet
					Katalog	Catalogue	Kategorie
★ Favorites					Norm	DIN	Kategorie
T Standard parts							
Pending Changes							
1 Automation jobs viewer	<			>			
? Queries	Query Result (3 element(s) found) (Document Manage	r/		4 Þ ×			
	🗸 DIN 961 Stahl 8.8 blank Feingewinde 🔶 Categ	ory 🛀 Standa	ard 🏦 1.00	GheckedIn			😋 Testl 🗸 🗙

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

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

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

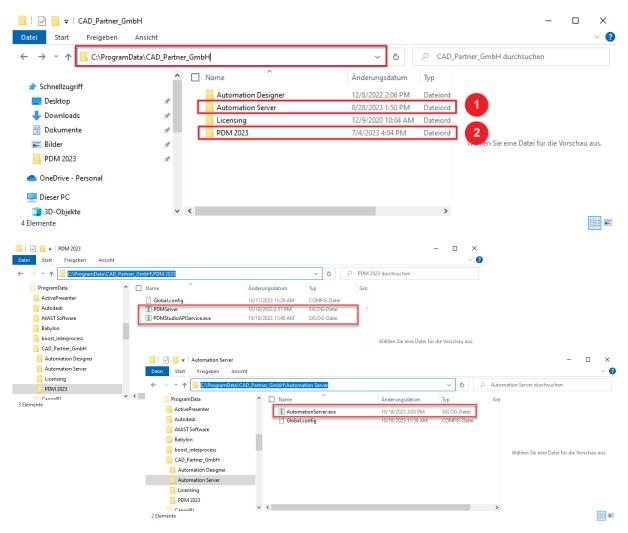


Logging

With the MP03, the API Service (PDMStudioAPIService.exe.sxlog) and PDM Server (PDMServer.sxlog) logging has been moved from the Windows event log to the

"C:\ProgramData\CAD_Partner_GmbH\PDM 2023" (2) folder, and the Automation Server (AutomationServer.exe.sxlog) logging has been moved to the

"C:\ProgramData\CAD_Partner_GmbH\Automation Server" (1) folder of the operating system.





Other (Technotes)

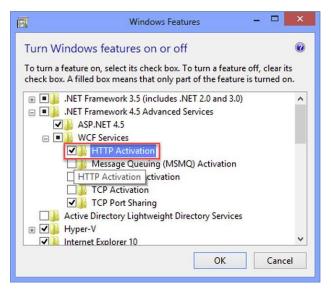
General

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

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

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

However, there is a direct solution to the problem:



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

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

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

Message Cache monitoring could not be initialized

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



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				Ac	tions		_
> 🛱 Custom Views		Crents 1,550							
Vindows Logs	Level	Date and Time	Source	Event ID	Task C 🔨	PD	M Cache Audit	^	
Application	(i) Information	2/15/2023 9:22:00 AM	Folder	0	None	1	Open Saved Log		
Security 1	(i) Information	2/15/2023 9:22:00 AM	Folder	0	None		Create Custom View		
Setup	(i) Information	2/15/2023 9:22:00 AM	Folder	0	None	L 1			
System	(i) Information	2/15/2023 9:22:00 AM	Folder	0	None		Import Custom View		
Forwarded Events	(i) Information	2/15/2023 9:22:00 A	Folder	0	None		Clear Log		
✓ I Applications and Services Logs	(i) Information	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		2		
ConverterServer	(i) Information	2/15/2023 9:22:00 AM	Folder	0	None		Properties		
Hardware Events	Ä						Find		
😭 Internet Explorer	<				>		Save All Events As		
😭 Key Management Service	Event 0, FolderAu	ditWatcher			×	1	Attach a Task To this Log		
> 🛄 Microsoft	· · · · · · · · · · · · · · · · · · ·					- I	-		
Microsoft Office Alerts	General Detail	s				L	View	•	
> 📋 OpenSSH					<u>^</u>	Q	Refresh		
📰 PDM Cache Audit		gert\AppData\Roaming\CA	D_Partner_G	mbH\PDM	2023\				
PDM Server	\Metadata\PE	M_000023.par.sxmd				?	Help	•	
😭 SmapInstaller	1 '					Ev	ent 0. FolderAuditWatcher		
SmapWebClient	Log Name:	PDM Cache Audit					Event Properties		۰.
😭 SmapXServer	Source:	FolderAuditWatcher	Logo	ned:	2/15/				
ThinPrint Diagnostics					· ·		Attach Task To This Event		
😭 Windows PowerShell					>	B	Сору	•	
C.t	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:



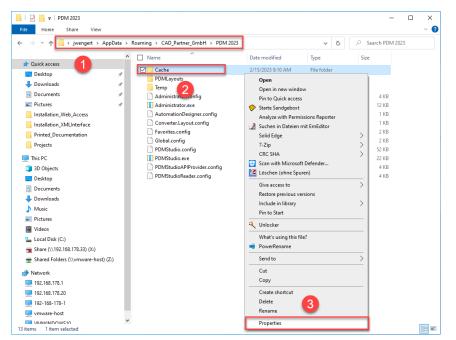
	ummary eck the resu		_ 0	23
Level: 🚺 Wa	rning	▼ In Copy Sexport		
	Time	Message		
-	26.11	Initialization of the cache 'C:\Users\jwengert\AppData\Roaming\CAD_Partner_GmbH\PDM 2020\Cache' audit failed.		
2	26.11	Validation of cache 'C:\Users\jwengert\AppData\Roaming\CAD_Partner_GmbH\PDM 2020\Cache' audit failed.		
	26.11	Cache audit 'C:\Users\jwengert\AppData\Roaming\CAD_Partner_GmbH\PDM 2020\Cache' setup was not successfull, fallbacking to cache v	vatcher.	
	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.		
			Clo	ose

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).



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 to the "Advanced" (2) button.

Advanced Sec	curity Settings for (Cache				×
Name: Owner:	C:\Users\jwenge jwengert (VMWI		ng\CAD_Partner_GmbH\PDM 2023\(t) 👎 Change	Cache		
Permissions	Share	Auditing	Effective Access			
	t to continue?	or have been give	the appropriate privileges to view th			
				OK Cancel	Арј	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 ir	formation, double-c	lick an audit entry. To modi	ify an audit entry, select the	entry and click Edit (if available).
iditing entries				1
Туре	Principal	Access	Inherited from	Applies to
Success	Jeder	Full control	None	This folder, subfolders and files
Add	Jeder	Full control	None	This folder, subfolders and files

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.

🖅 Run	×
0	Type the name of a program, folder, document, or Internet resource, and Windows will open it for you.
Open:	secpol.msc 🗸
	OK Cancel Browse

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

 Seculatings Account Policies Audit Policy Audit Policy Construct Assignment Seculations Windows under Firewall with Advanced Security Network List Manager Policies Public Key Policies Software Restriction Policies Software Restriction Policies Software Restriction Policies Software Restriction Policies Multi policy Configuration 	Local Security Policy File Action View Help				×
	 Secultings Account Policies Audit Policy Gaudit Policy User Riphts Assignment Secultions Windows under Firewall with Advanced Security Network List Manager Policies Public Key Policies Software Restriction Policies Software Restriction Policies Application Control Policies IP Security Policies on Local Computer 	Audit account logon events Audit account management Audit directory service access Audit logon events Audit object access Audit policy change Audit privilege use Audit process tracking	No auditing No auditing No auditing <u>No auditing</u> No auditing No auditing No auditing	9	

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 Properties	?	\times
Local Security Setting Explain		
Audit object access		
Audit these attempts:		
This setting might not be enforced if other policy is cor override category level audit policy. For more information, see <u>Audit object access</u> . (Q9214	-	
	2	
OK Cancel	App	oly

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.

Z C:\Users\j	wengert\Deskto	p\PDMStudio	_System	_Plugins.z	ip\			_		\times
Datei Bearbe	iten Ansicht	Favoriten	Extras	Hilfe						
÷		\checkmark	00	⇒	-		×	ī		
Hinzufügen	Entpacken	Überprüfen	Корі	ieren	Verschieb	en	Löschen	Eigenschaften		
🏂 🖬 C:\U	sers\jwengert\D	esktop\PDMS	Studio_Sy	stem_Plug	gins.zip\					~
Name			Größe	Gepackt	te Größe	Geänd	dert am	Erstellt am	Letzte	r Zugriff
Plugins			82 432		31 408	2020-	10-14 07:15			
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<										>
0 / 1 Objekt(e) ı	markiert									

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



→ ★ his PC → Local Disk	(C:) → F	rogram Files → CAD-Partner → PDM Stud	io 2023 > Plugins >	5 V		
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	E	Commands	2/8/2023 9:41 AM	File folder		
Addins		Events	1/26/2023 8:42 AM	File folder		
Gnosti		Organizer 2	1/26/2023 8:42 AM	File folder		
		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		
×64		SolidEdge2022.Plugin	1/26/2023 8:42 AM	File folder		
x86		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 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).

<u>6</u>		PDM Studio Administrator	– 🗆 ×
			🍫 Options 🔹 📥 Login 🔹 👔 About 🕤 Info 💡 Help
Welcome	Save 🚺 Save 🚺 Save	🕽 Reset	
Organizer templates	PDM Studio Common Settings Oisplay names	🔺 🕿 Collapse all 🕜 Defaults Reset	
Article templates	?? Predefined queries	Select required plugins:	More plugins selection:
Project templates	Application plugins Plugins manager	Event	Plugin
Lsers and groups	Properties to view	General Events	
Status user rights	Expose properties		
😫 Settings	🏙 Unique properties		
Jobs provid	🎦 Commands manager 🔂 Layout order	PDM Studio 2023	×
SE Solid Edge Applications	🚓 Generators 😳 Miscellaneous	\bigotimes	
XML Interface		Complete definition for following plugins: Revise Documents Validator: plugin missing.	3
👰 Install libraries	PDM Studio Automation Server Settings Settings Settings	Structure Viewer: plugin missing. Where Used Viewer: plugin missing.	
🧭 Tools	PDM Studio Solid Edge plugin Properties		OK
	□ PDM Studio Organizer / project plugins	Copy to clipboard	
	XML Listbox Multi		
	XML Listbox XML XML Process Listbox		
	XML Project Listbox		
V	😭 Property revision blocker	▼	
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	•
Revise Documents Selector	Default document Revise selector	-
Revise Documents Validator		-
	Default document Revise validator	
Revision H. 1. ditor	Default document revision history editor	-
Revision History Multieditor	Default documents revision history multies	-
Source Files Selector	Default source file selector	-
Source Folder Selector	Default source folder selector	-
Standard Category Attributes Editor	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).

4 1		PDM Studio Administrator	- 🗆 ×
			🥎 Options 👻 📥 Login 👻 👘 About 🍵 Info 💡 Help
Welcome	💾 Save 🔃 Refresh 🕑 Defaults 🔃 Res	et	
Organizer templates	PDM Studio Common Settings Display names	Collapse all 🛛 Defaults 🐧 Reset	
Article templates	····· 🕐 Predefined queries ····· 👔 Organizer templates	Select required plugins: Event Plugin	More plugins selection:
Project templates	C3 Application plugins 	User interface	
Users and groups	Properties to view	Category Info multilanguage editor Category Info multilanguage editor Change Status Documents Selector Default document Change <u>stat</u> us selector	·
Status user rights	Exposities	Change Status Projects Selector Default project Change s 2 ector	-
Settings		Check-in history editor Default document check-in history editor Check-in history multieditor Default documents check-in history multieditor	•
S Jobs provider	🔓 Layout order	PDM Studio 2023	×
SE Solid Edge Applications	🛱 Generators 😳 Miscellaneous	(i)	
XML Interface	<mark></mark> Languages 	Settings have been saved successfully.	
Install libraries	PDM Studio Automation Server Settings Jobs sender	3	•
💋 Tools	PDM Studio Solid Edge plugin	ОК	
	PDM Studio Organizer / project plugins	Copy to clipboard	-
	XML Listbox XML XML Process Listbox	Job scheduling document selector Job scheduling document selector Multi History Multieditor Default documents multi history multieditor	-
~	XML Project Listbox M Studio User Interfaces plugins POM Studio User Interfaces version blocker	Multi History Multieditor Default documents multi history multieditor Normalize Documents Selector Default document Normalize selector	• • •



Other enhancements/improvements/changes/fixed bugs

Enhancements:

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

Improvements:

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





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

Changes:

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

Repaired Bugs:

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



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



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



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



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