



# PDM Studio

What's new 2023 | EN | MP 01

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## Introduction

**PDM Studio 2023 MP01** 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 MP01** 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 MP01.

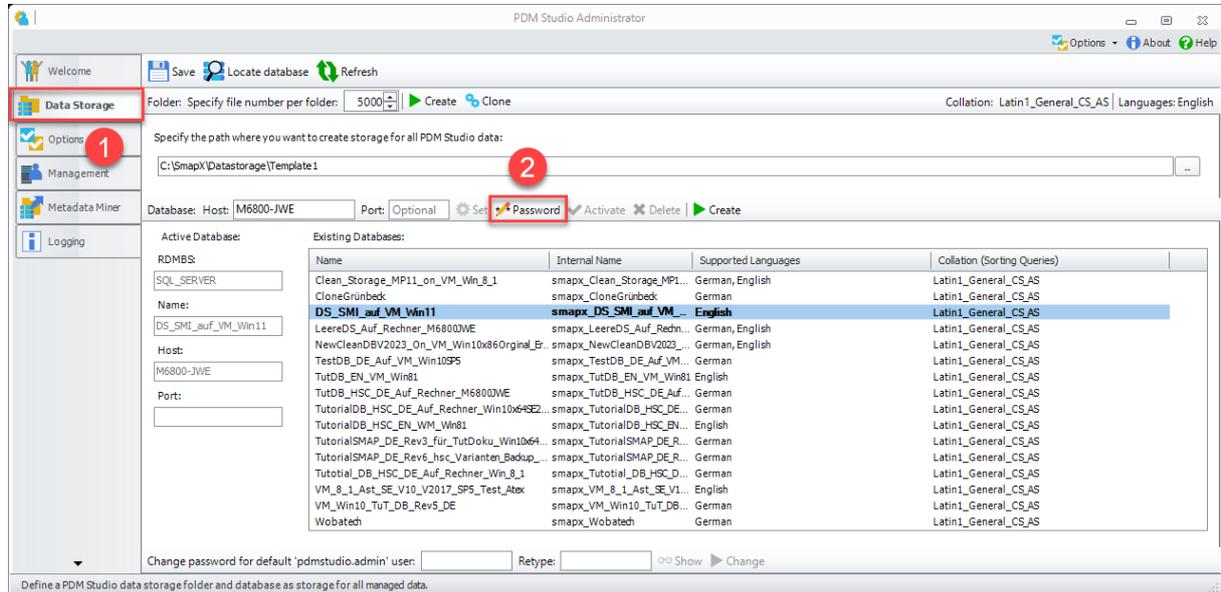
## Installation

**Important: We strongly recommend checking in all documents and clearing the local cache on all clients before installing PDM Studio V2023 MP01.**

**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.**

## Server Administrator

### Changing the password for the SQL Server user



## Background

The PDM Studio Server Administrator automatically creates a so-called "primary user" with the name "Cadpartner\_adm" and a fixed automatic password for creating the SQL database and communicating with the Microsoft SQL Server when logging on to the SQL Server for the first time.

Depending on the security policies set in the company, by the operating system and/or by the SQL Server, it may happen that the automatic password for the "primary user" is rejected, e.g. due to the length and/or complexity of the password, and as a result the automatic creation of the "primary user" fails and therefore no database can be created.

For this reason, the "Password" function (2) has been implemented on the "Datastore" tab (1). The new function allows you to change the password of the "Primary User" so that it complies with the company's security policy, and the "Primary User" can be created automatically by the PDM Studio Administrator.

**IMPORTANT:** Change the password only if the primary user cannot be created automatically during the initial creation. If no problems occur when connecting to the SQL Server from the PDM Studio Server Administrator and the SQL database is created, no password change is required. Also, if you already have a running PDM environment, you do NOT need to change the password.

**Note:** The Password function is available only when the PDM Server is shut down.

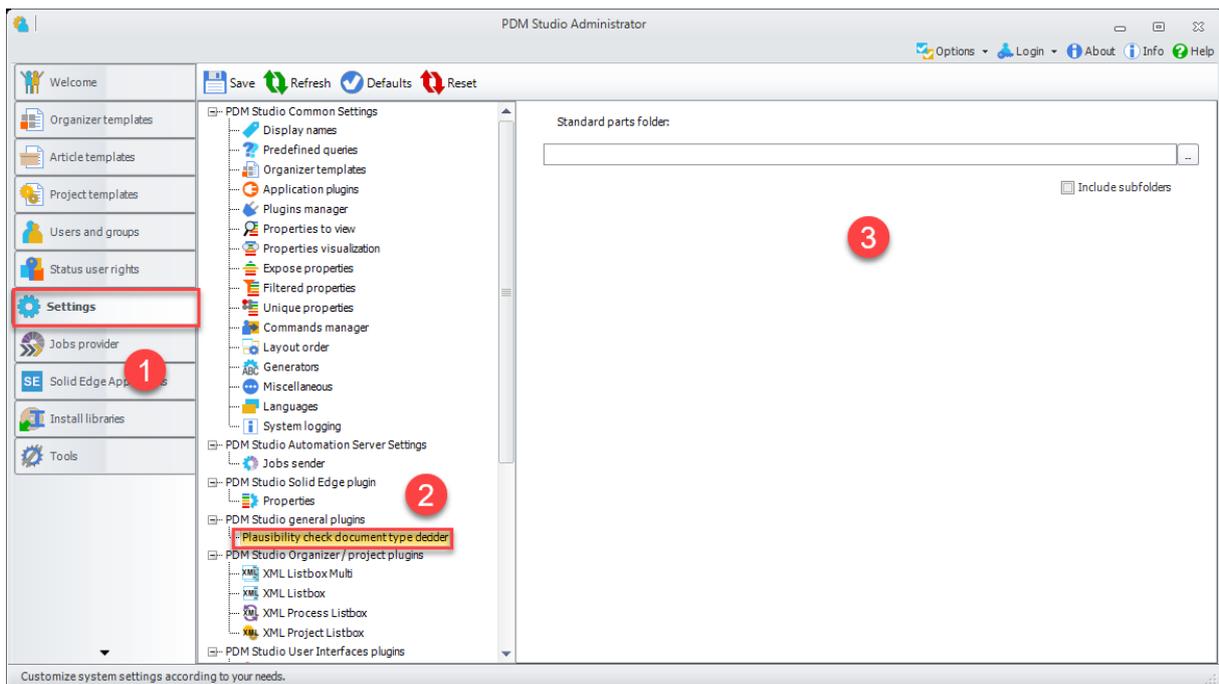
After executing the function, you will be informed that changing the password may have consequences.



**Do not change the password unless it is absolutely necessary.**

## Client Administrator

### 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)**.

For customers who only use the standard parts of Solid Edge, the new function 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.

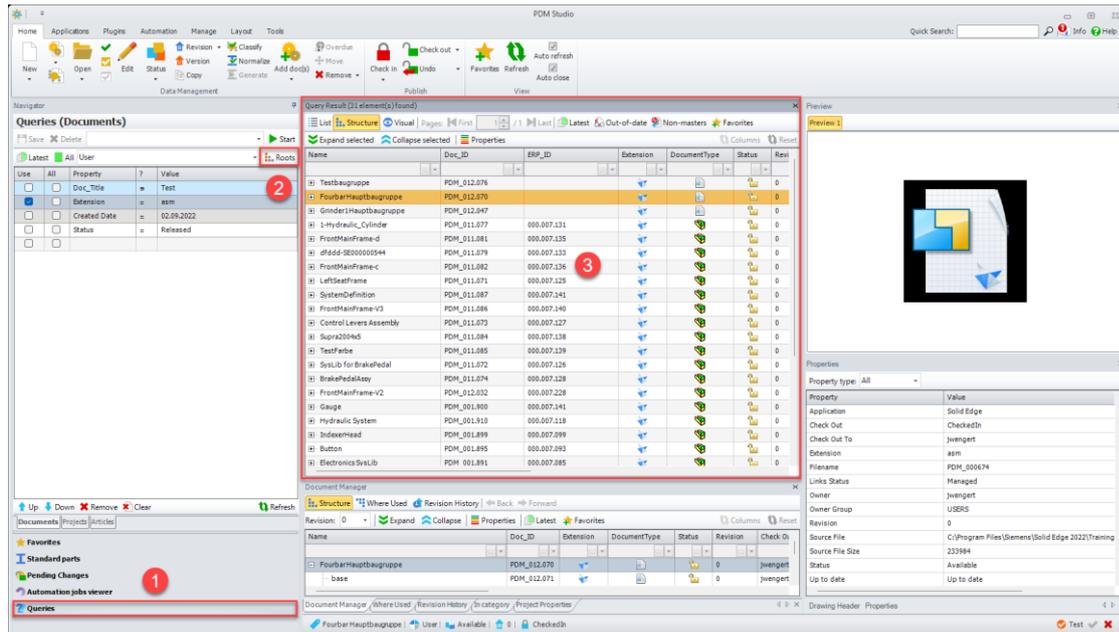
The plugin then uses the source path (local standard parts folder) to decide whether all parts in this folder should be imported as standard parts. The option "**Include subfolders (3)**" will include all subfolders.

All other documents **NOT** located in the selected folder will be 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.

## PDM Studio

### New switchable query filter All/Roots



A new filter (2) has been added to the QueryBuilder. With the new filter, depending on the setting, only root documents (documents without parent links) can now be displayed as query results (3).

The new toggleable filter filters the query result as follows:

### Documents

-  All - searches for all documents (like before)
-  Roots - searches only for documents that have no parent links to master documents. The query result does not contain any Non-Master Documents.
-  The Roots filter  allows you to search for documents that are not used anywhere.

### For Projects

-  All – searches for all Projects (like before)
-  Roots - searches only for projects that are not subprojects of other projects.

### For Articles

Not available.

## Other (Technotes)

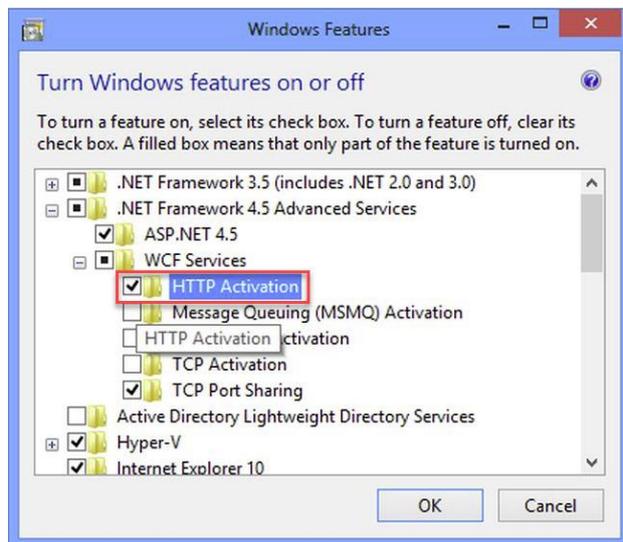
### General

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:



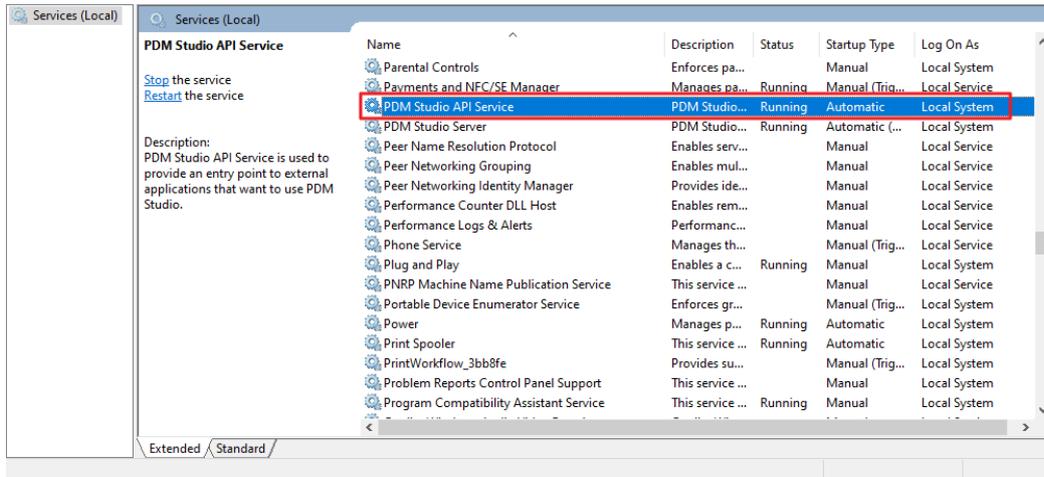
If the **Microsoft .NET Framework 4.8** is installed, go to the **Windows Features** in Windows Settings, and open the "Turn Windows features on or off" settings.

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

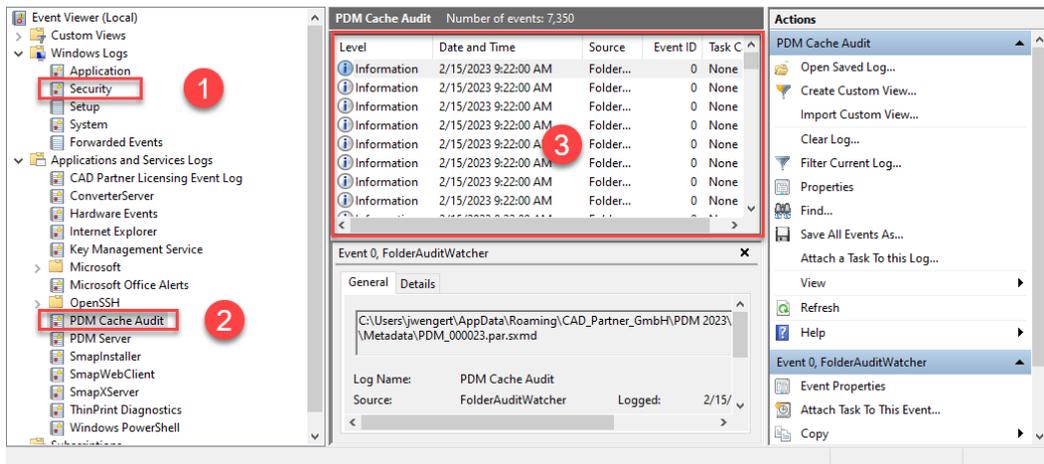
After that, all PDM application should work again without problems.

### 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.



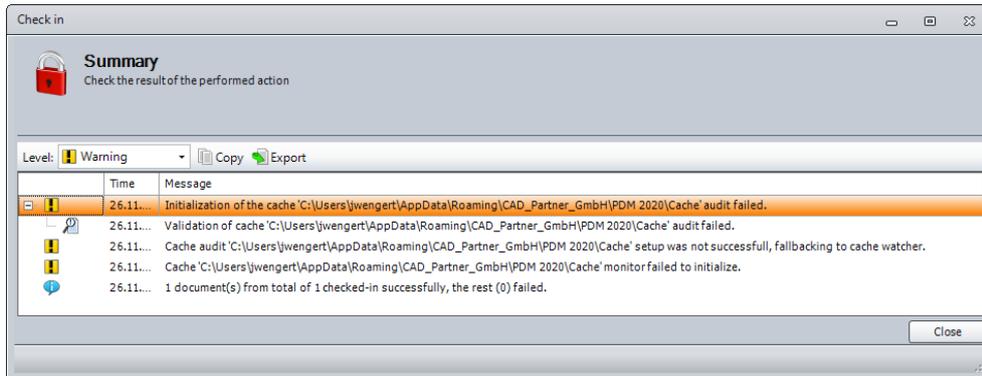
The most important point is that the PDM Studio API service **MUST** have access to the "Security" event log (1).

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:



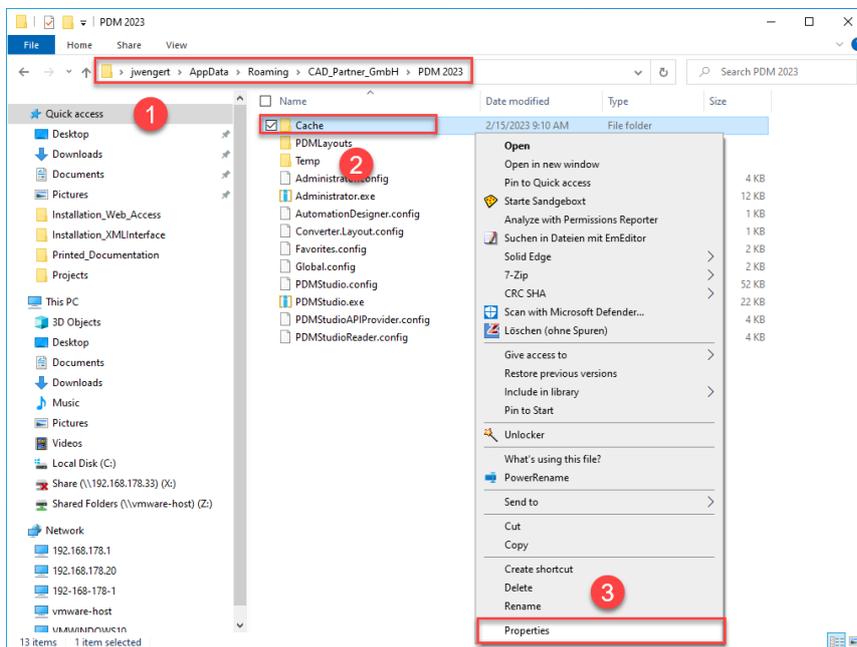
**Important:** This is because the company's security policy cannot be changed directly from the workstation, but is controlled globally by IT.

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.

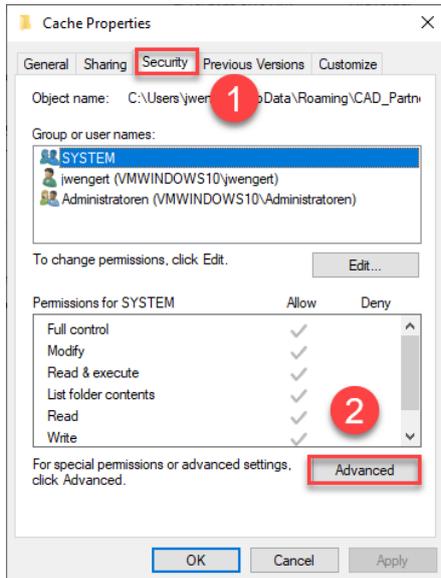
If this happens, check the following Windows settings.:

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

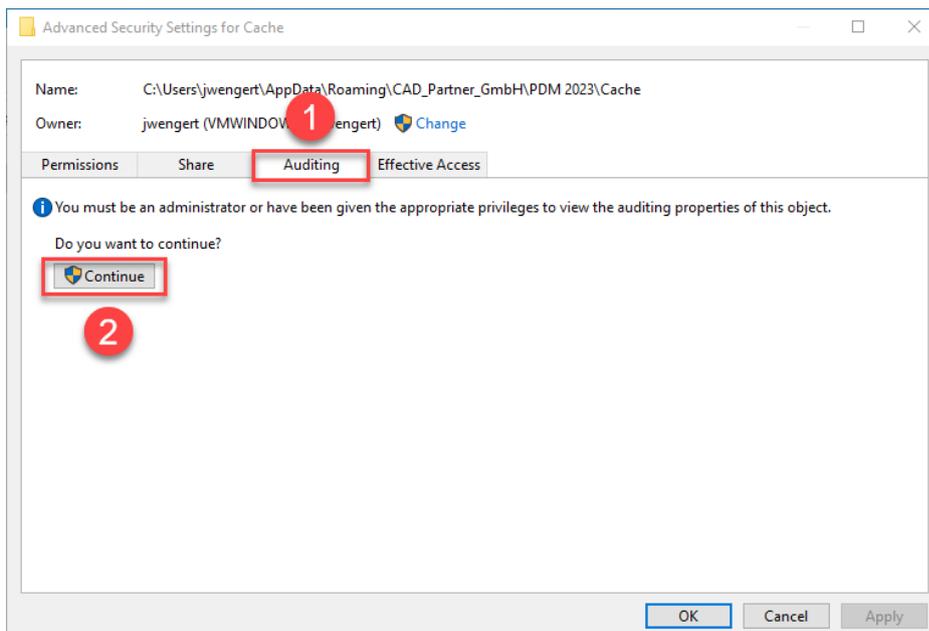
Usually: "C:\Users\[User]\AppData\Roaming\CAD\_Partner\_GmbH\PDM 2023"



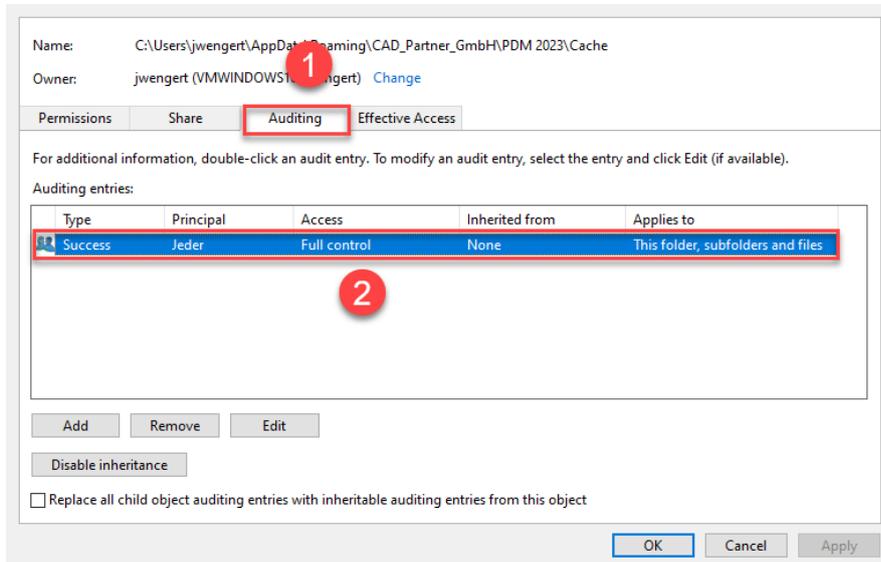
Right-click on the "Cache" folder (2) and select the "Properties" (3).



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

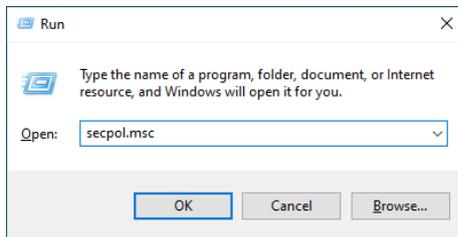


In the "Advanced security settings" of the cache directory, select the "Auditing" tab (1) and then click Continue (2).



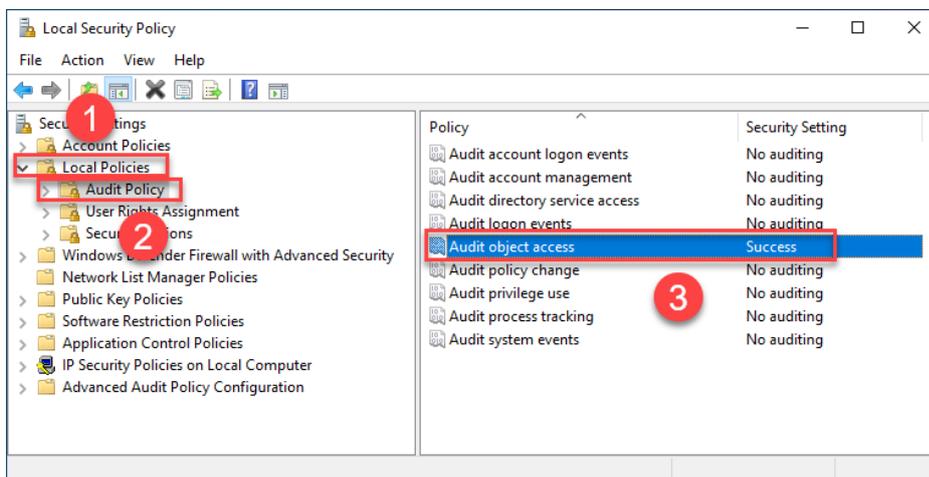
Go to the "Auditing" tab (1). In order to be able to monitor successful access to the cache folder and all its subfolders and files, "Full control" (2) over this folder and all its subfolders and files **MUST** be configured for everyone without any restrictions. If this is the case, then everything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

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

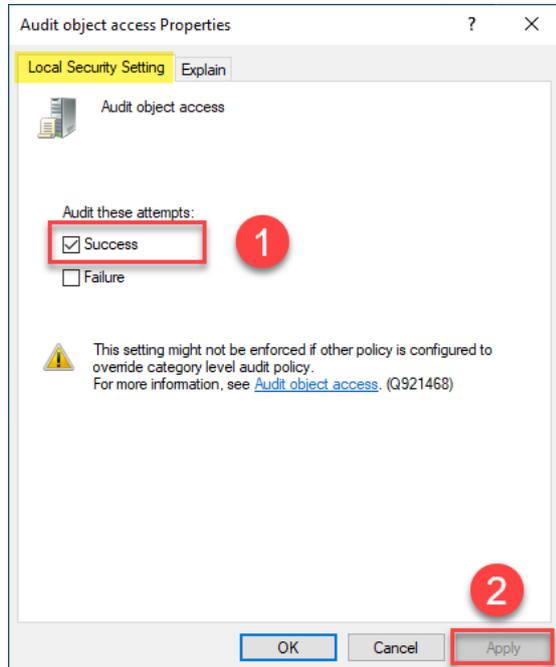


Then enter the command "secpol.msc". The Local Security Policy will be started.

*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.***

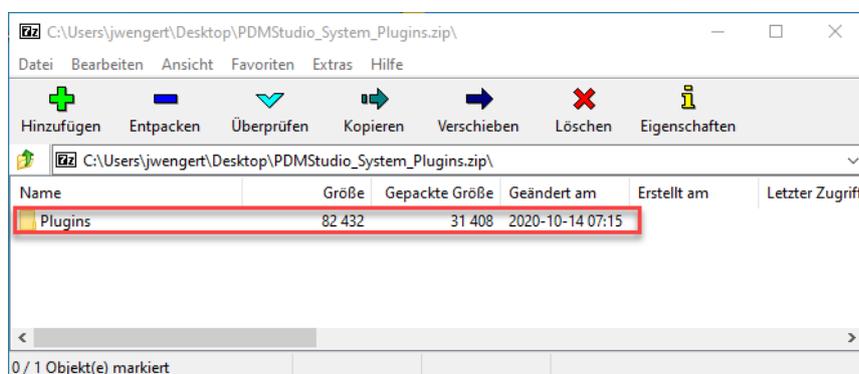
For more information on installing the Free- and Freeconverter plug-ins, refer to the Installation Plugins chapter in the "PDMStudio\_Installation\_2023\_EN.pdf" document.

#### Add - Add-On Tools

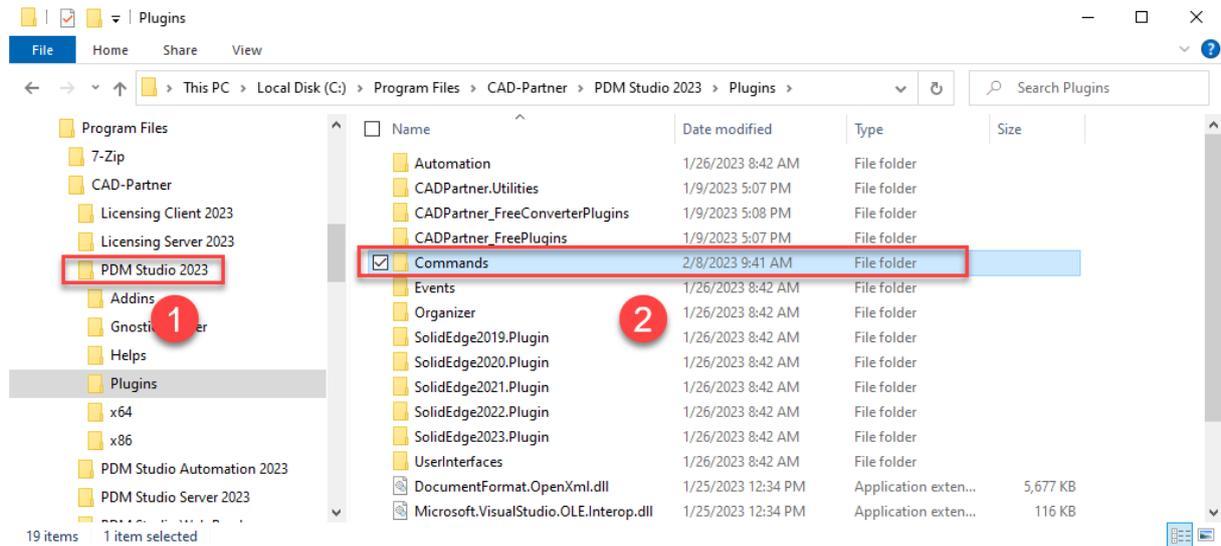
The "Unmanaged Export" function is not included in the installation package of the standard software and must be installed separately after installing the 2023 version.

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".

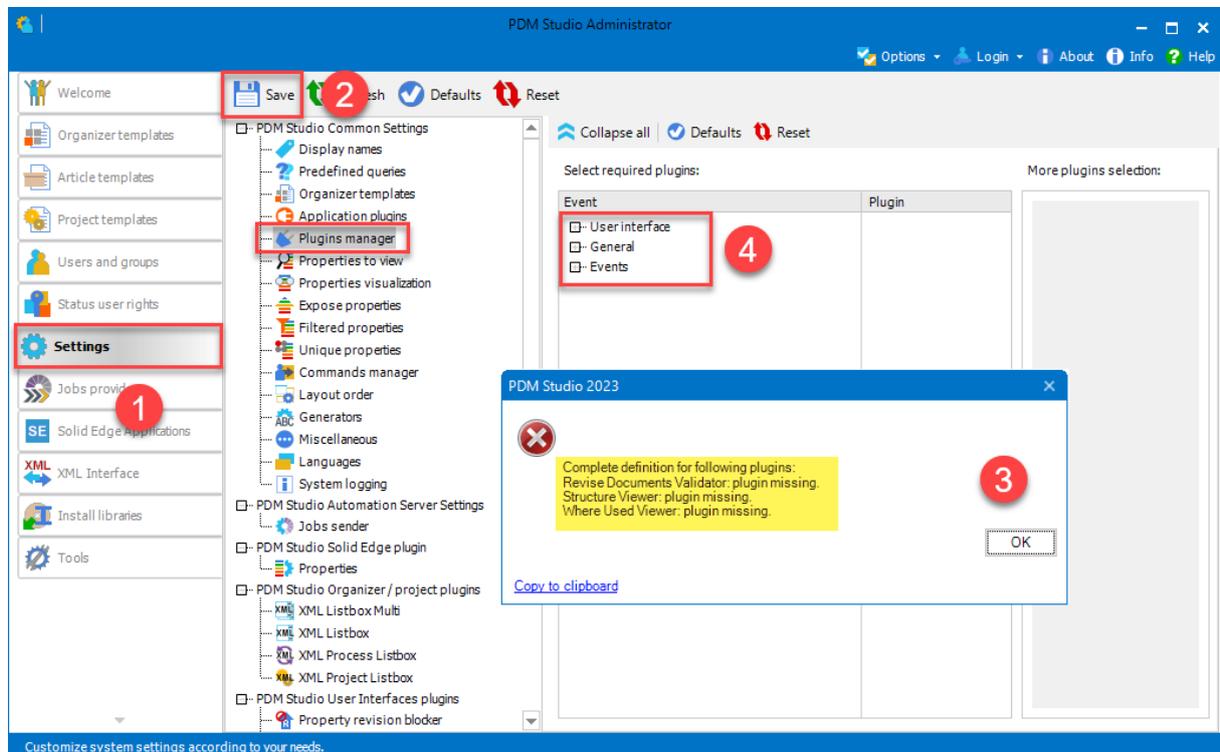
*Note: The "SmapX.Client.Tools.dll" contains functions specific to your company's PDM Administrator. Therefore, it must be copied ONLY once to the PDM Administrator's computer. If you need to use these special functions - our support will inform you.*

*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

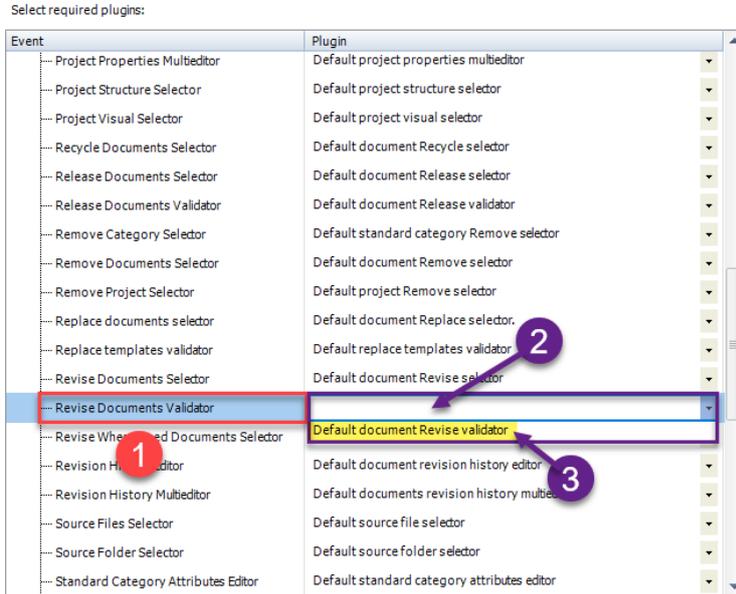
Each installation may also bring new settings to the Client Admin. You will need to manually configure these settings.

*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.*

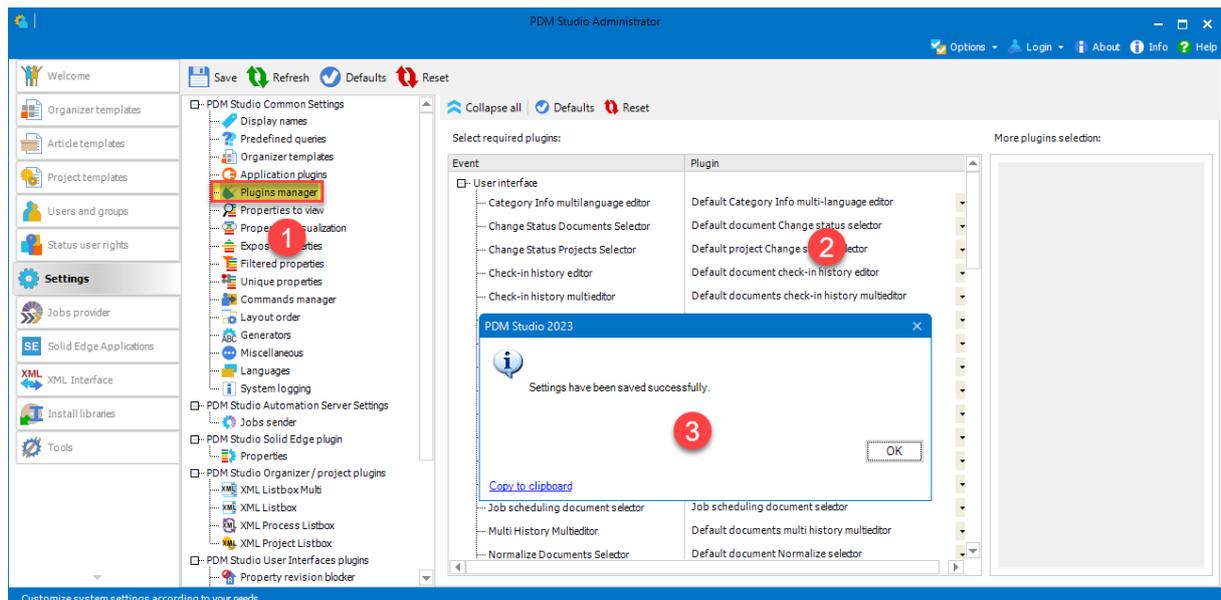
Expand the Event where the Plugin is located, in our example "User interface" and scroll down until you see the mentioned Plugins (image above (3)) "Release Documents Validator" (image below (1)).



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
Installation	Added support for Solid Edge Modular Plant Design P&ID and PCSchematic Automation products in XML Interface installation.
Inventor integration	Added support for reading / writing Category Info from Inventor generated standard parts. Not generated parts in parent parts are not supported.
PDM Studio	Introduced missing plugin events for Place standard variable part wizard.
PDM Studio	Introduced possibility to check from events plugins if Automation Server is running.

#### Improvements:

Module	Description
Inventor integration	Inventor no longer has a delayed check-in process for new documents.
Migration	Reading file properties has been optimized in transfer phase.
PDM Server	Improved management of writing queue on the server
PDM Server	Improved logging when a duplicate property value is detected with option 'global property uniqueness' is activated in the PDM Server log.
PDM Server	Improved performance of check-in operation for documents contain global unique custom properties set in Client Administrator Settings.
PDM Studio	Improved the performance of Query Builder initialization.
PDM Studio	Added the default documents' filtering to the selection step of Job Scheduler wizard.
PDM Studio	Improved disabling non-masters documents in the first step of release document wizard when their master is not valid for release process
PDM Studio	Improved logging when adding documents to a project/article fails.
PDM Studio	Optimized and improved performance of Query Builder for case of high number of Organizer templates.
PDM Studio API	Improved the check-in-out command for imported unmanaged links. All unmanaged links are checked-out after completing this operation.
XML Interface	Improved XMLI Interface logging when XMLI receives an error instead of a reply.

#### Changes:

Module	Description
Migration	Removed relinking Disallow option in Migration application
Part Organizer	Disabled Add to Favorites button in Part Organizer when editing visual category.
PDM Studio	Changed selection rules of Update Document wizard during unchecking of non-master documents.

PDM Studio	Removed disabling Change Status buttons by user rights. User rights are validated directly in appropriate wizard.
Web Reader	Changed folder storage of previews for Web Reader.
XML Interface	XML Interface can be configured to have a longer ACK timeout.

### Repaired Bugs:

Module	Description
API Service	Fixed PDM Studio API service cache monitoring failure.
Application integration	Fixed message boxes' titles from application ribbons that were empty.
Automation Server	Fixed support of the 'free mode' on the Automation Server.
Automation Server	Fixed deadlocks on Automation Server when big amount of PDM Server requests are processing together.
Client Administrator	Swapped message boxes texts for "Manage properties of foreign parts" options when it is selected / deselected.
Client Administrator	Fixed the status list of 'Predefined Queries' settings that was not refreshed correctly.
General	Fixed synchronization of file properties in local file cache when metadata is modified by different user.
Installation	Fixed installation of PDM Studio API in Automation setup for correct support of XML Interface using Automation plugins.
Installation	Fixed launching PDM Studio Server when appropriate option is activated during update installation.
Installation	Fixed installation of PDM Studio Server that should be dependent on state of appropriate option in setup.
Installation	Fixed blocking installation of Automation when the option 'PDM Studio Automation' is deactivated.
Migration	Fixed the height of migration paths grid rows.
Part Keeper	Fixed an exception during saving unmanaged standard parts categorized to custom standard category in Part Keeper Standalone (unmanaged mode).
Part Keeper	Fixed an exception in Change Category wizard when specification should be modified.
Part Keeper	Fixed getting file properties from specific unmanaged standard parts in Part Keeper Standalone (unmanaged mode).
Part Keeper	Fixed Part Keeper implementation releasing correctly owned UI controls and their GDI objects.
Part Keeper	Fixed checking of file properties values global uniqueness for documents edited via Part Keeper.
Part Organizer	Fixed global unique properties validation in Part Organizer for standard parts
Part Organizer	Fixed disabling of "Add custom property" command and providing file properties of foreign parts when it is disallowed in Client Administrator.
Part Organizer	Fixed background colors in Part Organizer property editor.

PDM Server	Fixed losing documents' previews during full check-in operation in specific situation. When the preview is copied to the new data storage sub-folder.
PDM Studio	Fixed an exception when automation jobs gallery is expanded in ribbon bar.
PDM Studio	Fixed unselection of children documents by defined rules in the first step of Normalize document wizard.
PDM Studio	Fixed Copy standard part wizard when not generated parts are on input. Not generated parts are firstly generated.
PDM Studio	Fixed firing of Drawing Header Changing event in Revise document and Update document wizard.
PDM Studio	Fixed classifying documents to standard categories with in status Removed. This is blocked now.
PDM Studio	Fixed standard parts version when such files are reimported to the system. It means removed and imported again.
PDM Studio	Fixed enabling/disabling a status command because Solid Edge viewer stealing the focus. Fixed by workaround.
PDM Studio	Fixed replacing revised read-only document in opened assembly. Origin part has been replaced to temp file.
PDM Studio	Fixed multidoc crashing when filling all with something extra (column) selected.
PDM Studio	Fixed permission check during adding document to the project.
PDM Studio	All selection rules for the first step of Remove document wizard are applied correctly.
PDM Studio	Fixed standard parts selection in PDM Studio Browser.
PDM Studio	Fixed an exception during metadata check-out process when lot of users request PDM Server together.
PDM Studio	Fixed validation of Move project wizard when a removed project is selected on input. Also error message is improved.
PDM Studio	Fixed redundant displaying of process properties editor in Import user document wizard when option "Add to active project/article/folder" is set for adding to articles.
PDM Studio	Fixed starting query via Query Builder by pressing double enter.
PDM Studio	Fixed getting document's preview after replacing Organizer template from master to non-master type in special situation.
PDM Studio	Fixed query results for queries containing operator Exist with activate option ALL in Query Builder.
PDM Studio	Fixed importing standard parts in special situation. There must be three revisions of the same part and the first and third have the same filename and the second has different.
PDM Studio	Fixed an exception in PDM Studio after closing Part Keeper application before selected documents are fully loaded.
PDM Studio	Fixed displaying of documents previews in the Revision Document wizard in the last Organizer multi-editor step.
PDM Studio	Fixed a random error while having more event plugins set for single event.
Solid Edge integration	Fixed displaying proper documents in PDM Studio browser started from Solid Edge Frame Design application.

Solid Edge integration	Fixed reloading opened out-of-date documents during check-out process started from SE PDM Studio ribbon
Solid Edge integration	Fixed the check-out process for standard parts started from Solid Edge ribbon bar.
SOLIDWORKS integration	Fixed writing custom properties to SOLIDWORKS files without any custom property before.
SOLIDWORKS integration	Fixed replacing document links in SOLIDWORKS documents' structures.
Web Reader	Fixed enabling of the state for the Open button in Web Reader web application.
XML Interface	Fixed closing unmanaged Inventor after importing via check-in-out command.
XML Interface	Fixed correctly disabling of Place, Replace & Create Drawing commands in PDM Studio Application ribbon bar.
XML Interface	Fixed handling broken XML Interface commands requests correctly.
XML Interface	Fixed starting the external XML Interface process in all situations.
XML Interface	Fixed managing foreign and standard parts via XML Interface.
XML Interface	Fixed starting the external XML Interface process for Automation Server purposes.

## Imprint



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