



PDM Studio

What's new 2023 | EN | MP 05

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Introduction

PDM Studio 2023 MP05 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 "ReadmePDM2023MP05.txt" in the "Documents\EN" directory of your MP05 installation files. This document lists the ticket numbers of the solved tickets in MP05.

For more information on **how to install the V2023 MP05**, 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 MP05.

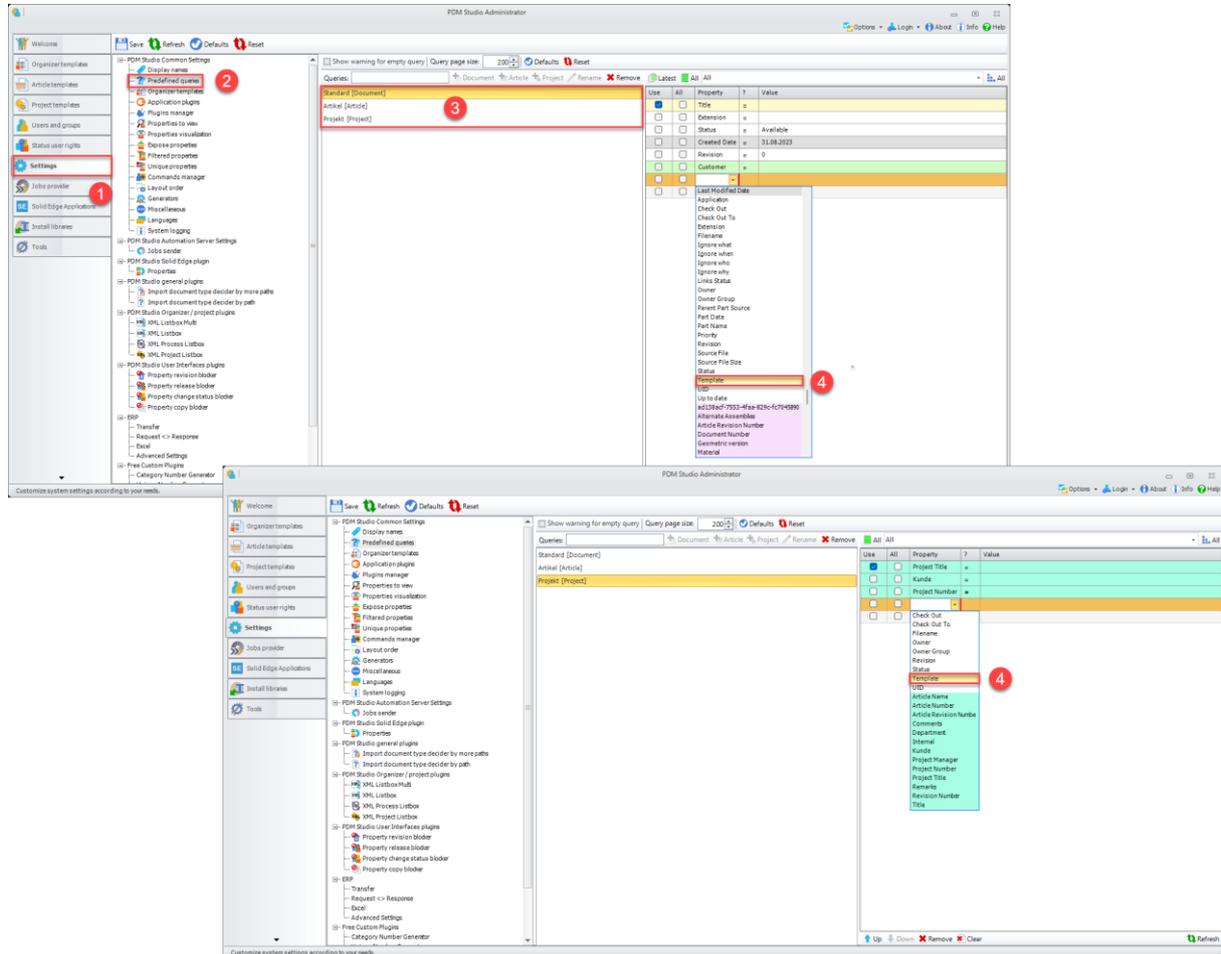
Installation

Important: We strongly recommend that you check in all documents and clear the local cache on all clients before installing PDM Studio V2023 MP05.

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

PDM Studio Client Administrator

Enhancement of Predefined queries for Organizer/Project and Article templates



In **Settings (1) > Predefined queries (2)**, the new **"Template"** property (4) can now be integrated into the **Predefined queries** for Documents, Projects and Articles (3).

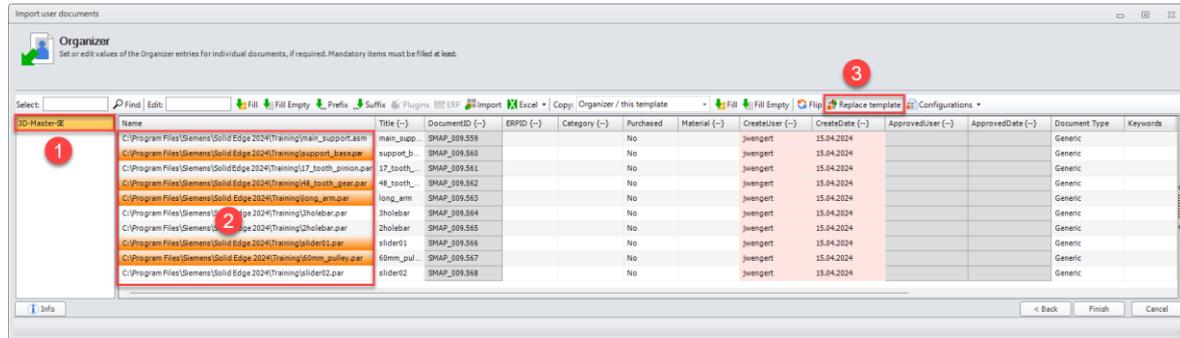
See above figure **"Predefined queries"** for Documents and Projects (Articles correspond to Projects).

For more information, see the PDM Studio chapter ["Querying for Document-/Project- and Article Organizer templates"](#).

PDM Studio

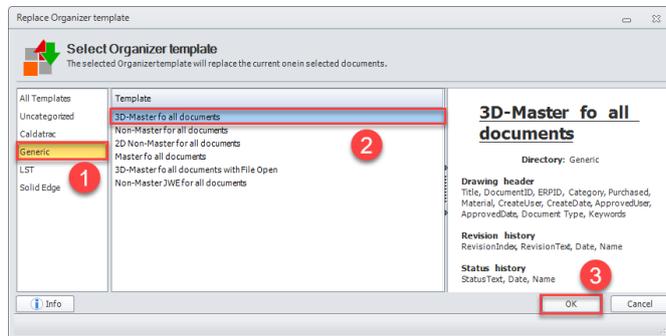
New function for changing the Organizer template when importing user documents

The new "Replace Template" (3) feature has been added to the "Organizer" step of the "Import user document" Wizard to selectively change the default Organizer template set in the Client Administrator when importing Documents into PDM Studio.

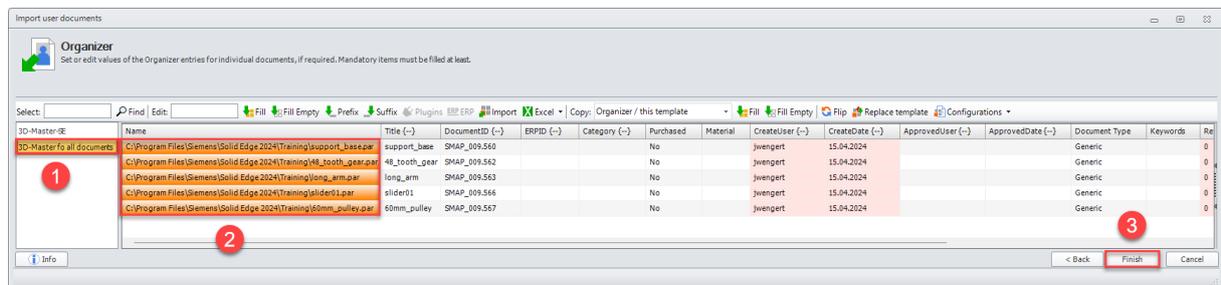


To change the default Organizer template (1) for the document(s) to be imported, select the documents (multiple selections are allowed) for which you want to change the Organizer template (2) on import.

Then select the new "Replace template" function (3).



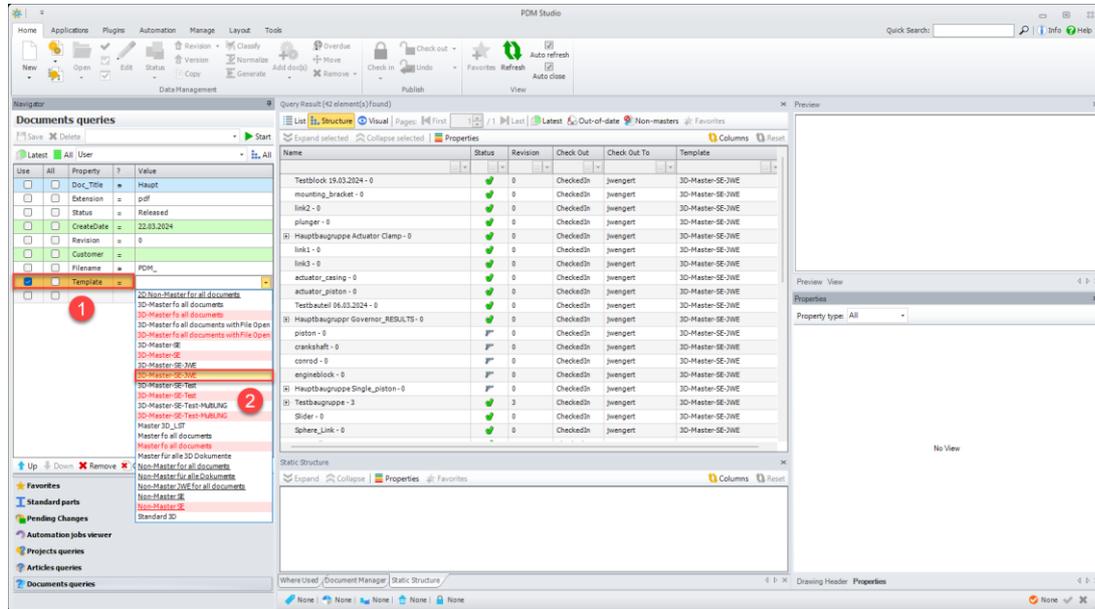
A new window "Replace Organizer template" will appear. Select your template group (1) and then select the new "Organizer template" (2) you like to use for the selected documents. Click on the "OK" button (3) to confirm your choice.



The selected documents (2) have now been assigned to the selected Organizer template (1). To complete the process, click the "Finish" button (3).

Query for Document-/Project- and Article Organizer templates

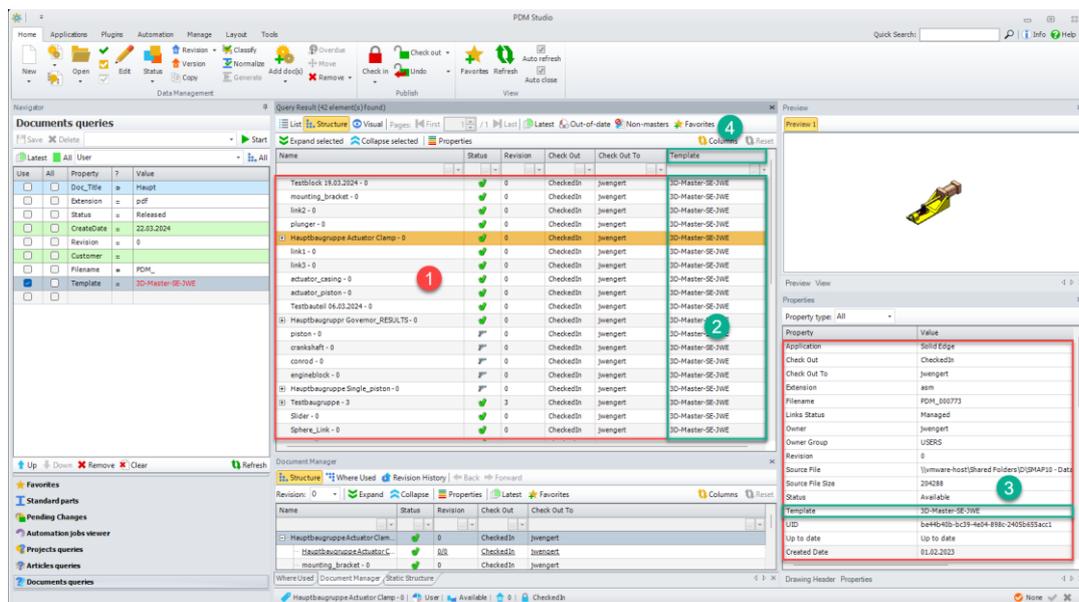
In MP05, the ability to search for the Organizer, Project and Article templates used for documents, projects and articles has been added to the queries.



The "Template" property (1), which uses the "EQUAL =" or "NOT EQUAL ≠" operators, has been made available for this purpose.

A list (2) of all existing Organizer templates in the system is available as a value.

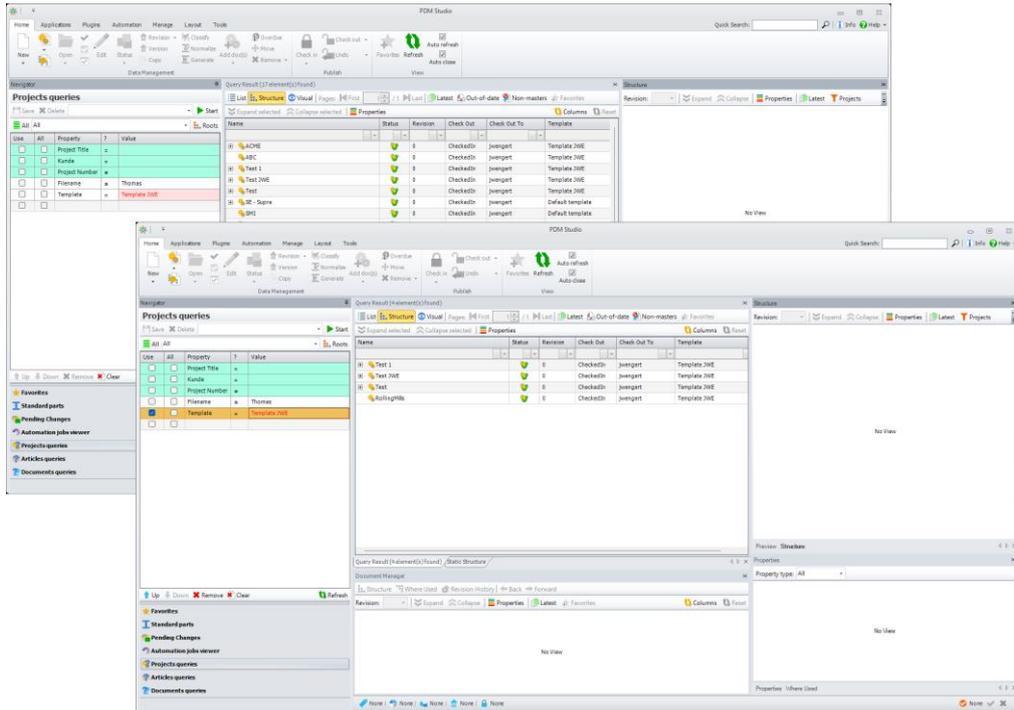
The templates highlighted in red are the **outdated master templates**. The red and underlined templates are the **outdated non-master templates**. The white color templates are the current templates.



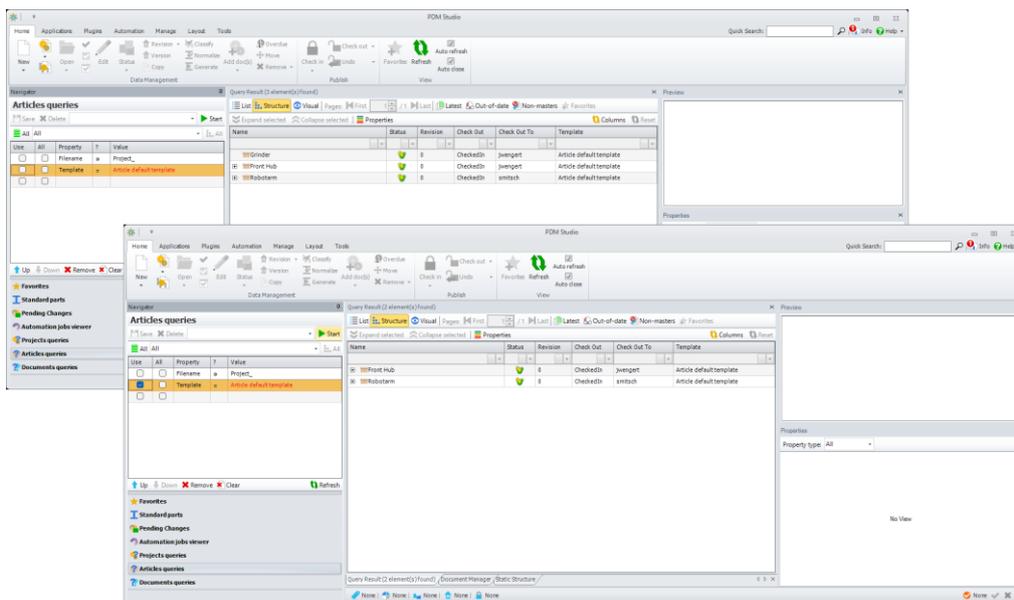
After "Executing" the query in the example above, the "Query result" (1) lists the documents to which an outdated template of the "3D-Master-SE-JWE" template has been assigned.

Important: If you have activated the property "Template" (4) in the displayed properties of the query result (1), the RED COLOUR DISPLAY in the "Template" column (2) and in the properties of a selected document (3) is currently not available.

Example Project query:

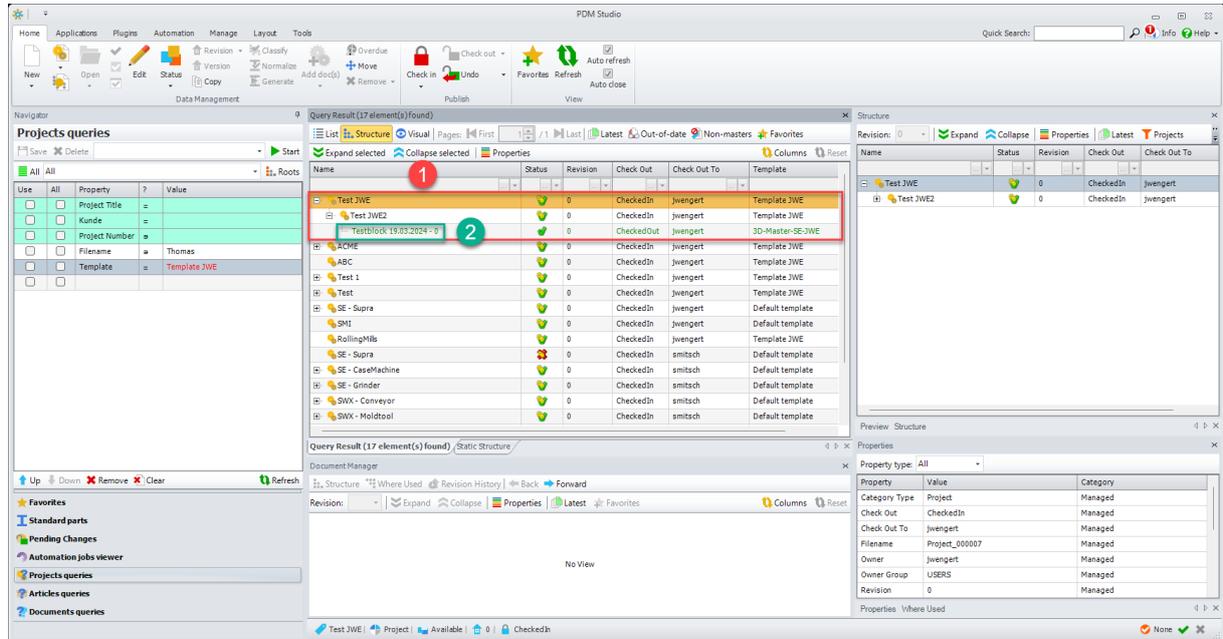


Example Article query:

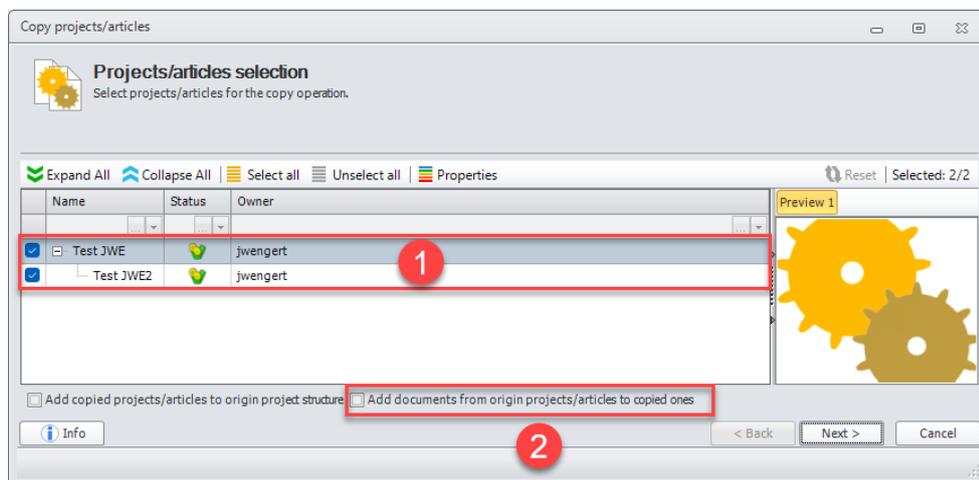


Improved Copy Project/Article functionality

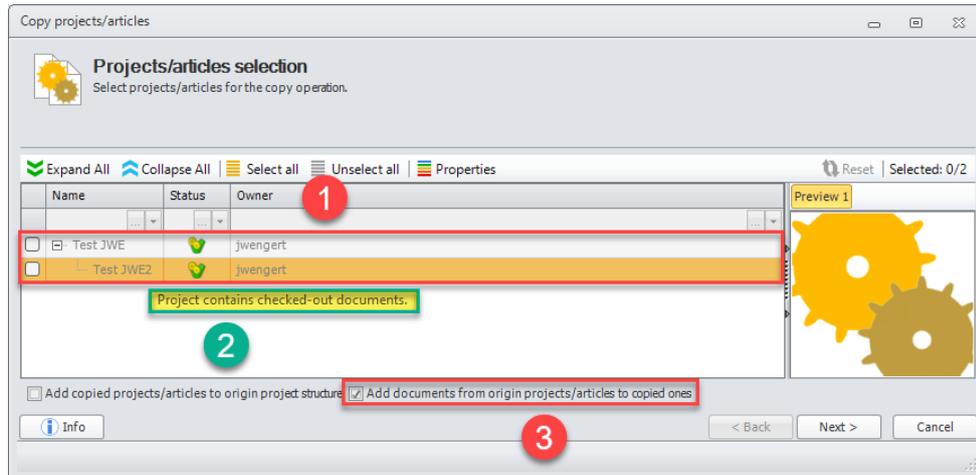
Previously it was not possible to copy projects that contained checked out documents. With MP05, the function has been extended so that pure Projects/Articles (copying without documents) can now be copied, even if they contain documents with "Checked out" status.



Example: Copy the project "Test JWE" (1) containing a subproject "Test JWE2" which contains a checked out document (2).



In the Wizard it is now possible to copy the **Project (1)** (or select which Project to copy) if the option "Add documents from origin projects/articles to copied ones" is **disabled (2)**. In this case, the Project(s) can be copied without content.

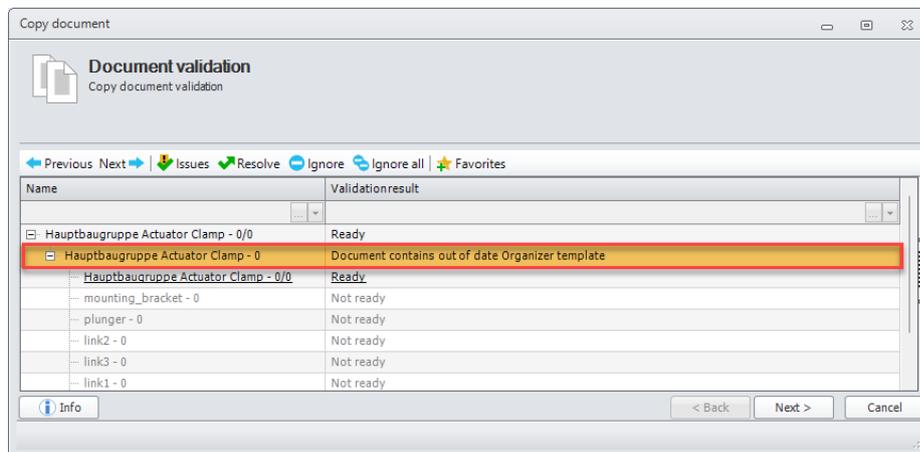


If the option "Add documents from origin projects/articles to copied ones" (3) is **activated**, you cannot copy the Project. This is because a Project to be copied with its documents must not contain any checked-out documents. If you **move the mouse over the bottom Project (1)**, a **tooltip (2)** will appear **with the reason** why the project cannot be copied.

Note: If there are documents in the project, they must first be checked in before you can use the "Add documents from origin Projects/Articles to copied ones" option.

Enhanced validation in the copy wizard

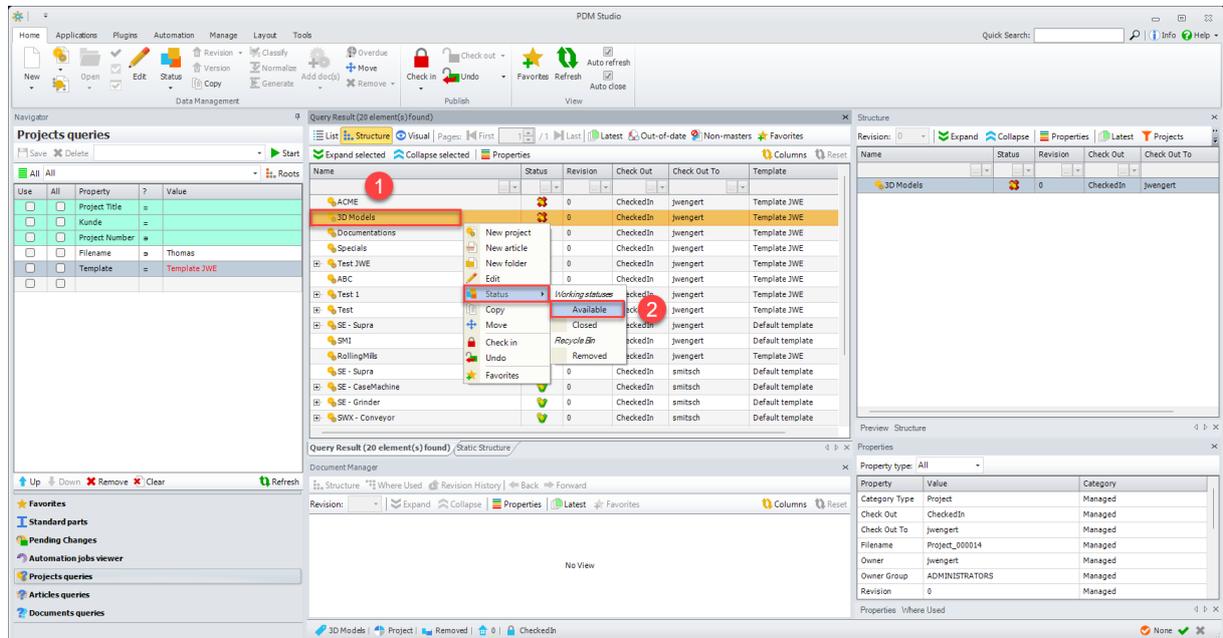
With MP05, the "Document validation" step has been added as the **second step** after the "Document selection" step for the document copy wizard.



Like the document revision wizard, the document copy wizard now checks and corrects out-of-date links, out-of-date organizer templates, links with the status invalid, out-of-date links with an inaccessible last revision and ambivalent links revision.

Recover removed Projects/Articles

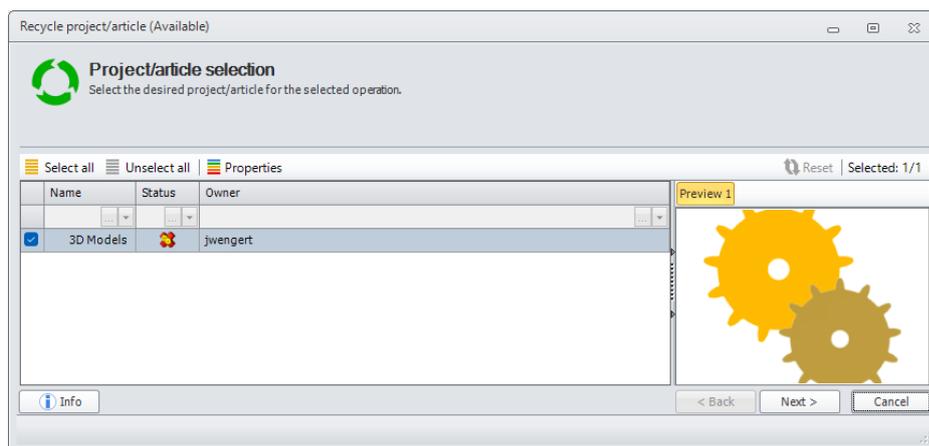
With MP05, Projects/Articles can now be transferred back from archive status "Removed" to the work status "Available".



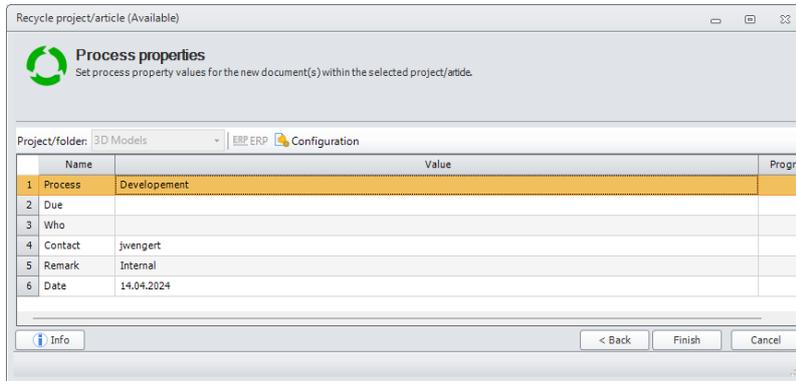
Important: The user **MUST** have the necessary rights to display the "Removed" status in PDM Studio.

To change a project from the "Removed" archive status to the "Available" working status, select the desired removed project (1) and set the status to "Available" using the "Status" function (2).

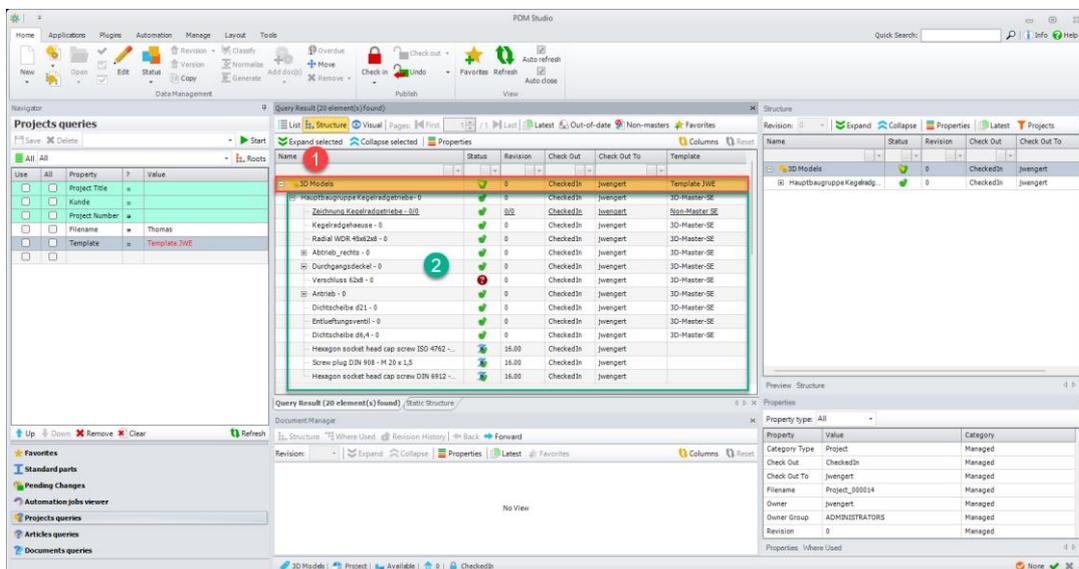
Note: It is only possible to change the status of one project at a time. Multiple selection is currently not possible.



The selected project will be displayed in the wizard. Click on "Next >". If the project is empty, "Finish" appears instead of "Next >".



Complete the "Process properties" (this step only appears if the Project/Article has documents) and click "Finish".



When the operation is completed, the project is returned back to the "Available" state (1) and the documents contained in the project are available again (2).

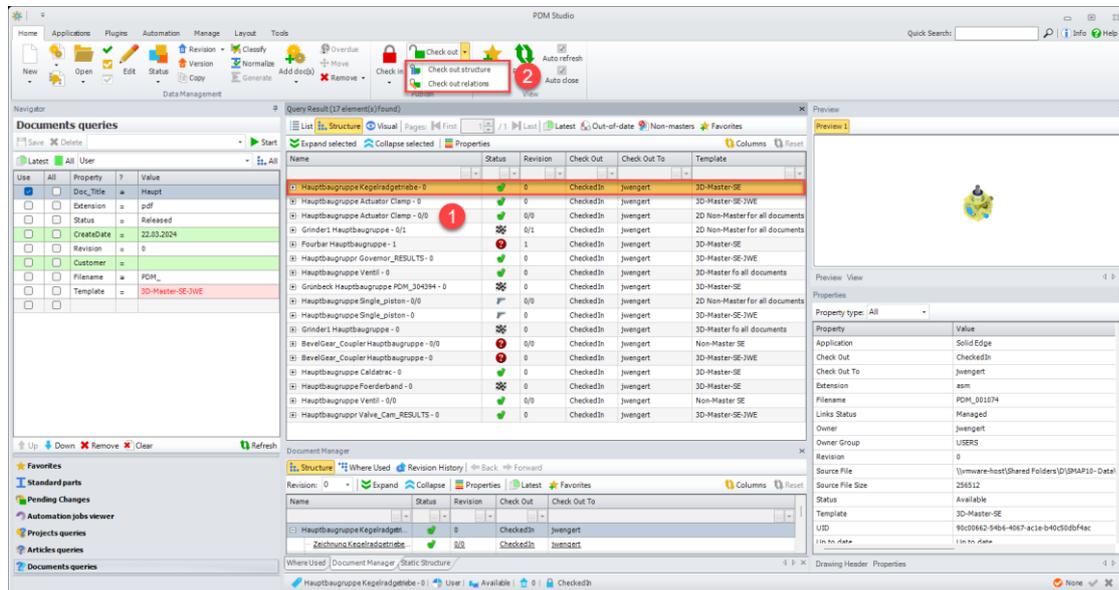
Important: A previously existing project structure (sub-projects in a project structure) will not be restored after "Recover". Folders contained in projects cannot be recovered either. If projects contain folders that themselves contain documents, the documents will be moved to the parent project when they are being recovered.

All documents that were unlinked from the project/article when it was removed will be reconnected when it is recovered in the same revision in which they were unlinked, REGARDLESS of their current status (with the exception of DELETED documents, which are not reconnected).

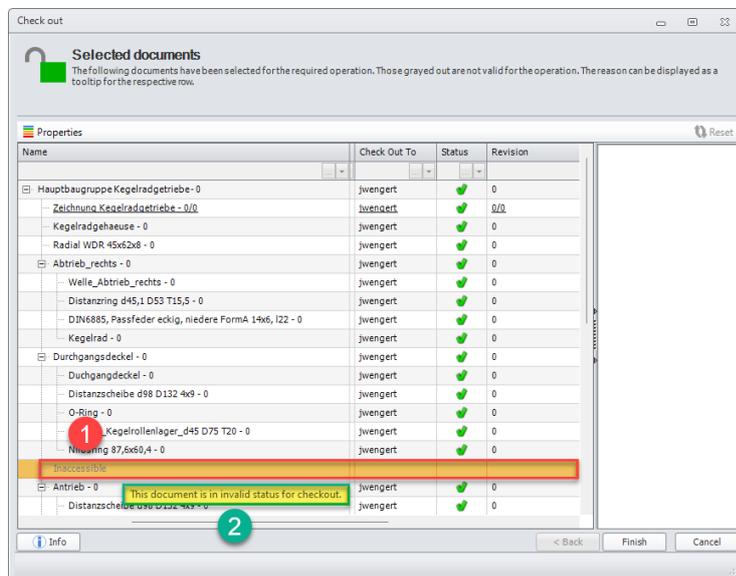
This means that if, for example, revision 5 of the document was unlinked when the project was removed, and that document was later released and a new revision 6 has been created, the released revision 5 will be linked again when the project is recovered.

The documents in the recovered project will be in the same state as before the project was removed.

Preview of the document structure for certain "Check out" functions



The "Check out structure" and "Check out relations" functions (2) in the first step of the wizard now displays a preview showing which documents are contained in the structure (1) and what state they are in.



If documents are displayed in **grey (1)**, they are excluded from the action, as the action cannot be performed on them.

A **tooltip (2)** is displayed when the mouse is moved over the respective document.

In our example, the reason for the grey display and the text "Inaccessible" (1) is that the status of the document is blocked for the user (he does not have the user rights to display this document and therefore it is not accessible to him).

Other (Technotes)

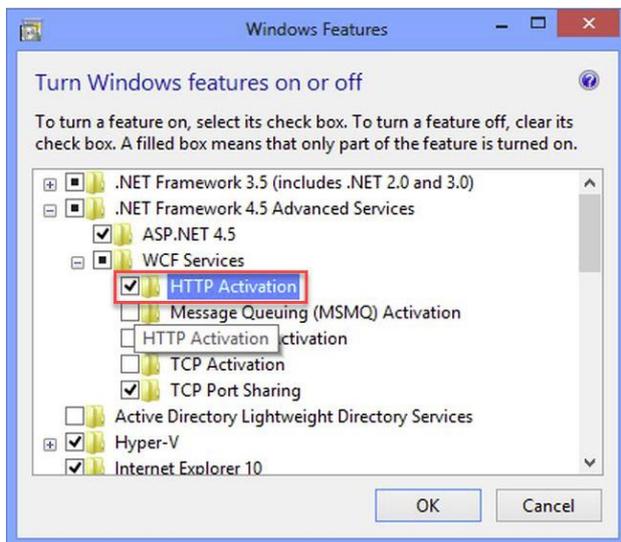
General

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:



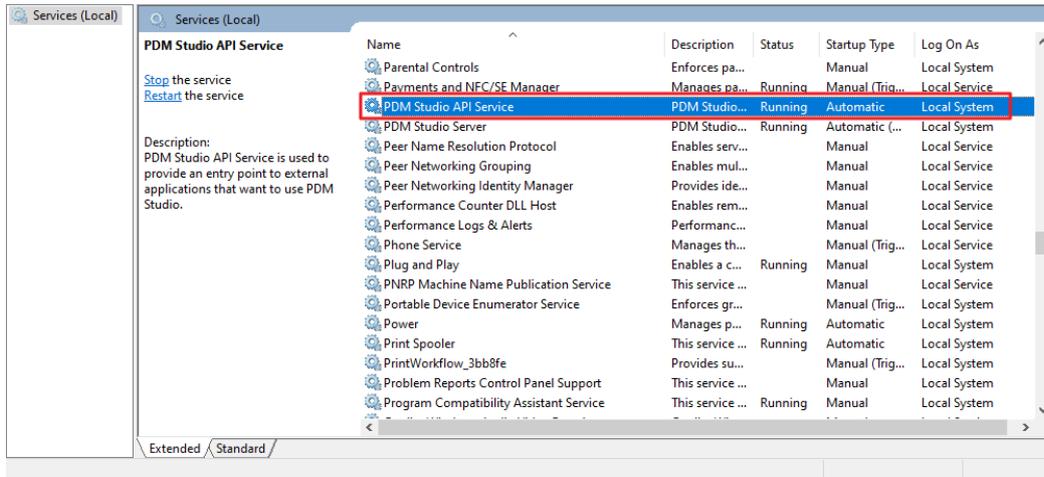
If the **Microsoft .NET Framework 4.8** is installed, go to the **Windows Features** in Windows Settings, and open the "Turn Windows features on or off" settings.

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

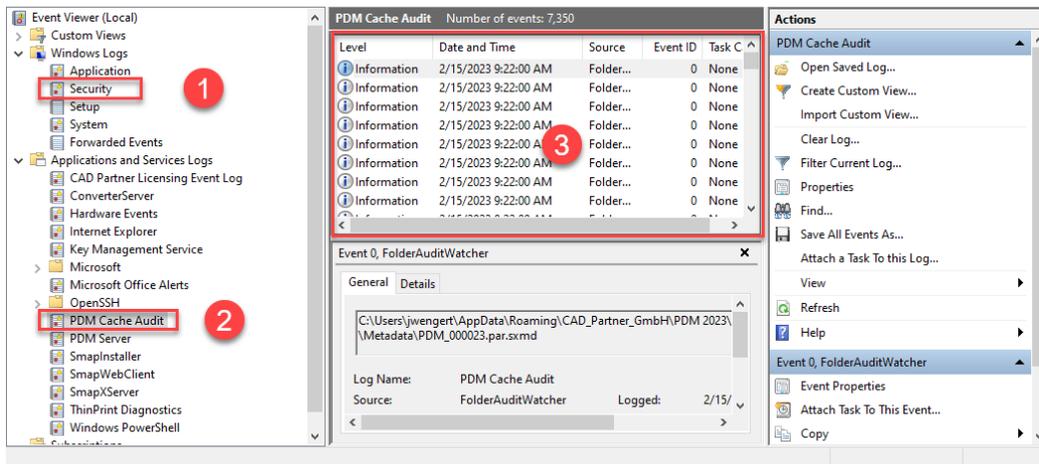
After that, all PDM application should work again without problems.

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.



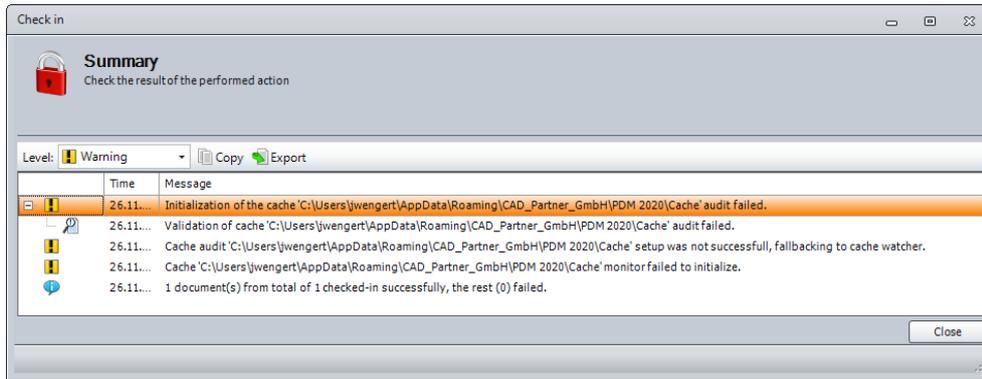
The most important point is that the PDM Studio API service **MUST** have access to the "Security" event log (1).

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 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:



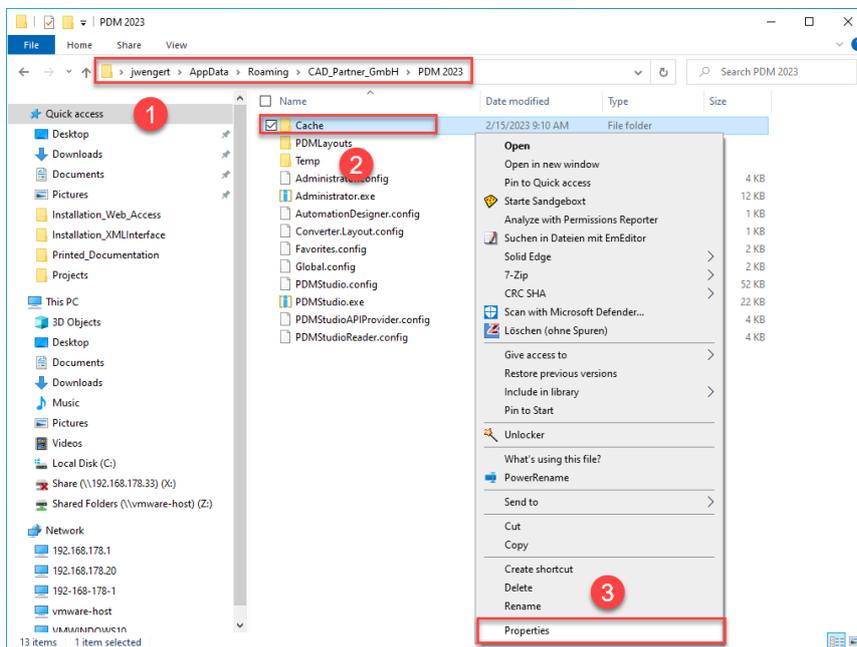
Important: This is because the company's security policy cannot be changed directly from the workstation, but is controlled globally by IT.

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.

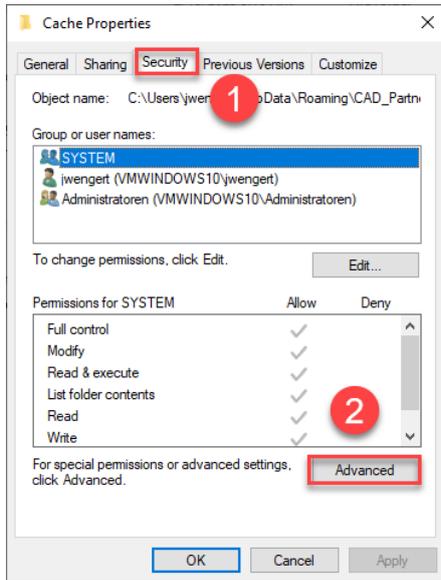
If this happens, check the following Windows settings.:

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

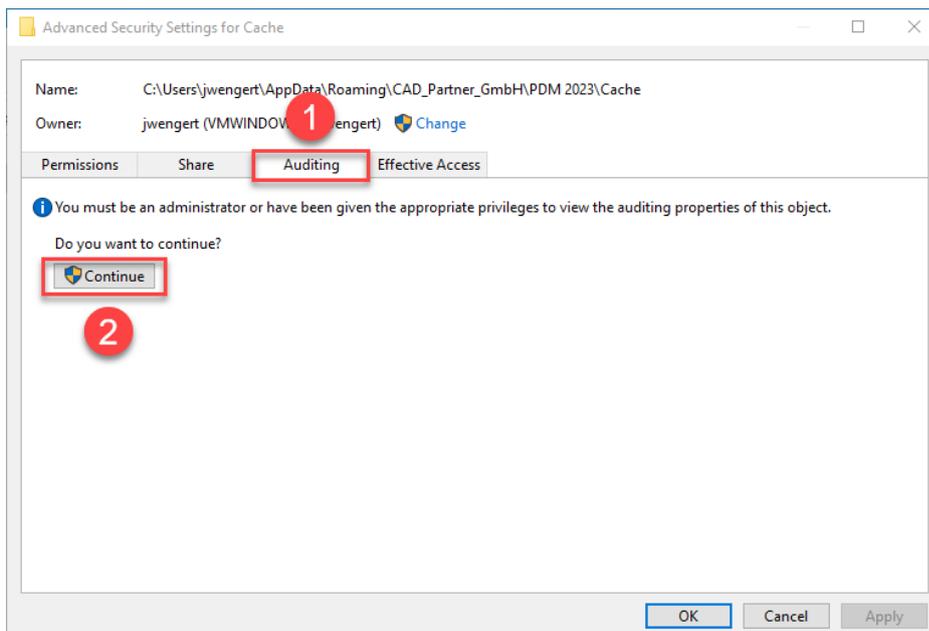
Usually: "C:\Users\[User]\AppData\Roaming\CAD_Partner_GmbH\PDM 2023"



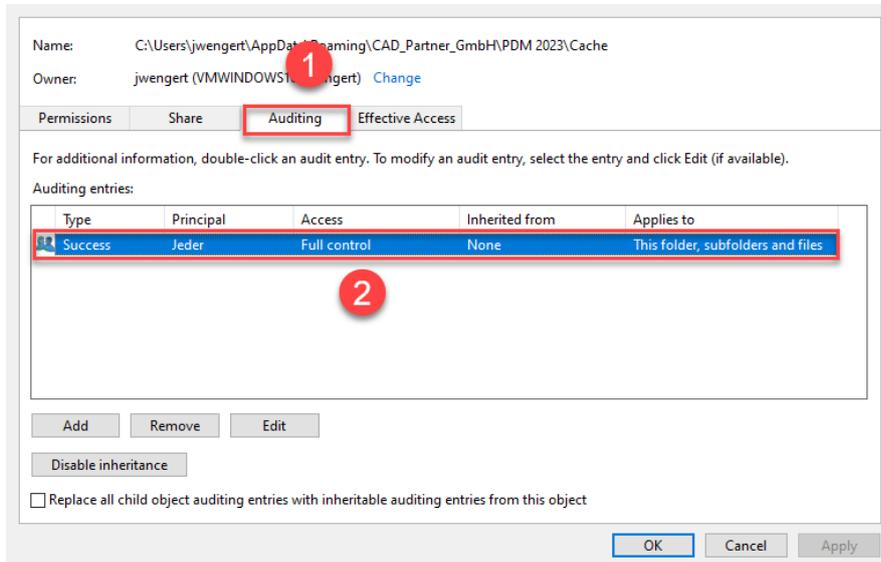
Right-click on the "Cache" folder (2) and select the "Properties" (3).



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

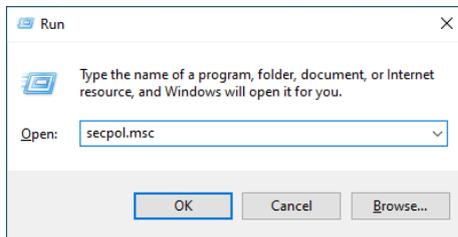


In the "Advanced security settings" of the cache directory, select the "Auditing" tab (1) and then click Continue (2).



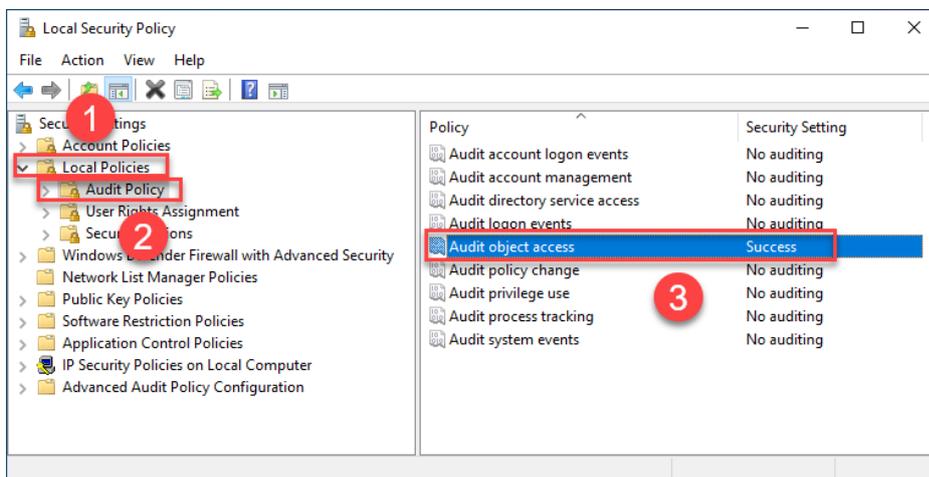
Go to the "Auditing" tab (1). In order to be able to monitor successful access to the cache folder and all its subfolders and files, "Full control" (2) over this folder and all its subfolders and files **MUST** be configured for everyone without any restrictions. If this is the case, then everything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

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

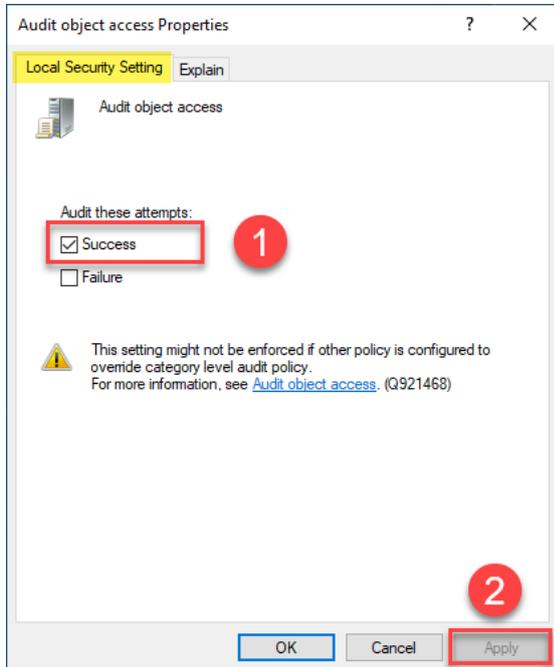


Then enter the command "secpol.msc". The Local Security Policy will be started.

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.

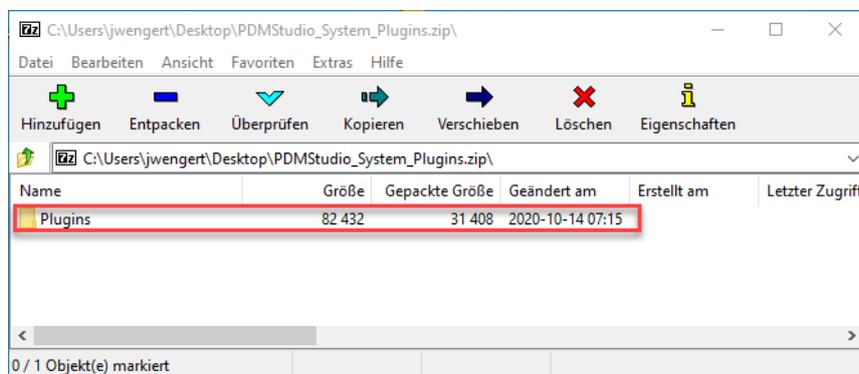
For more information on installing the Free- and Freeconverter plug-ins, refer to the Installation Plugins chapter in the "PDMStudio_Installation_2023_EN.pdf" document.

Add - Add-On Tools

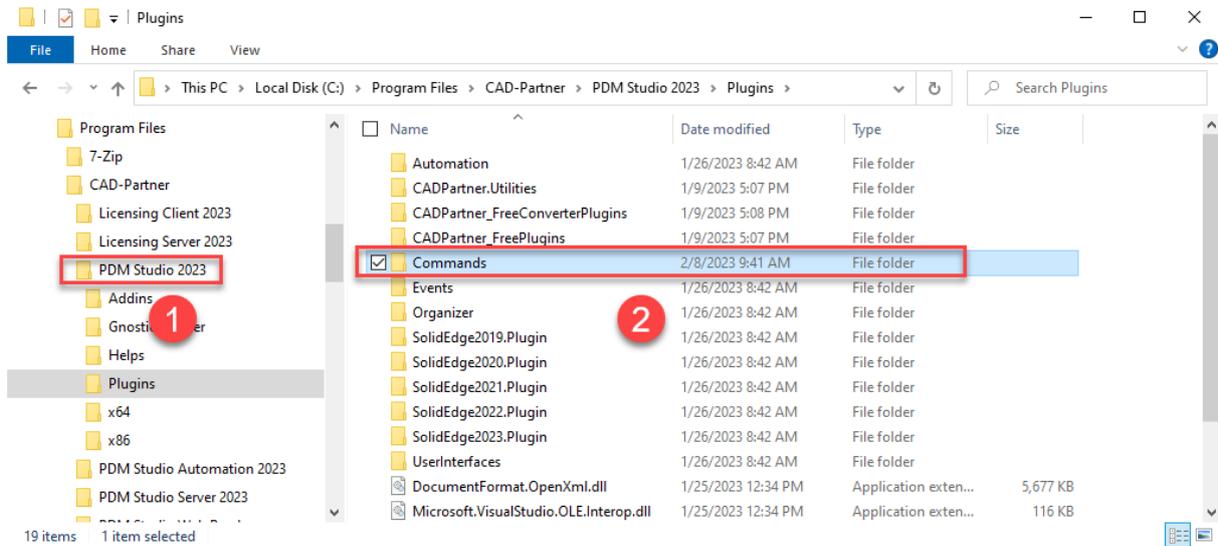
The "Unmanaged Export" function is not included in the installation package of the standard software and must be installed separately after installing the 2023 version.

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".

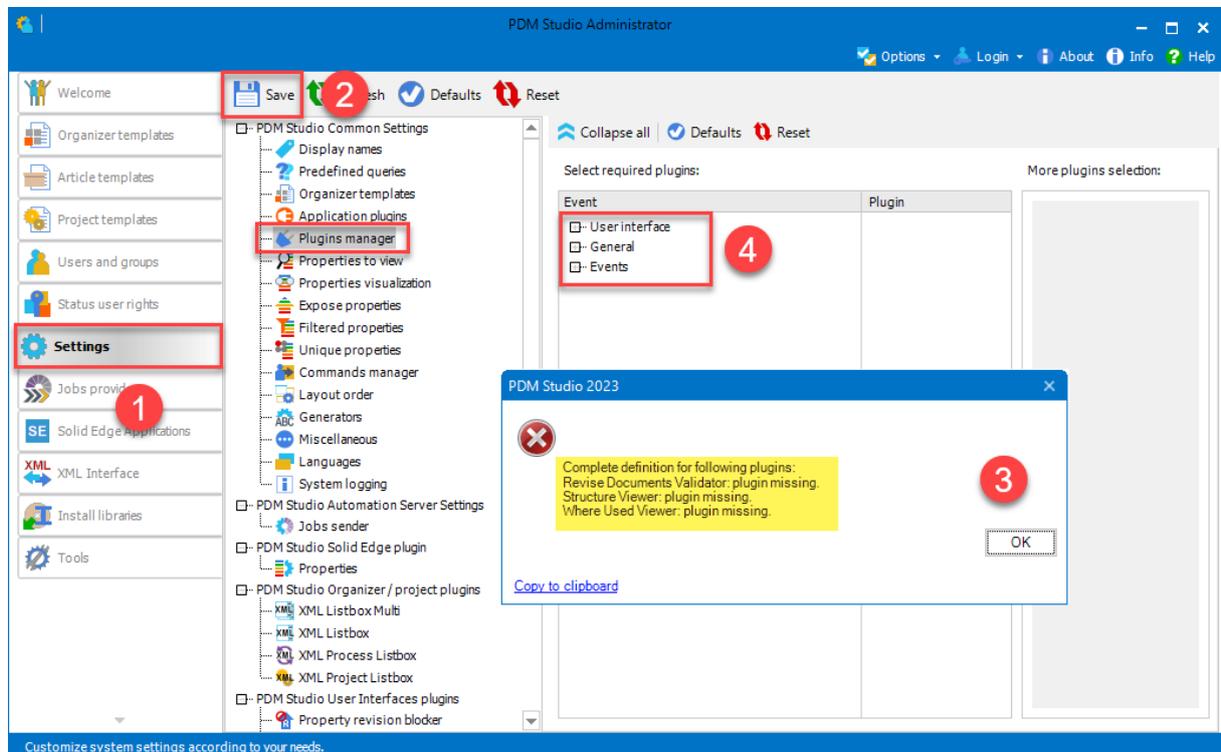
Note: The "SmapX.Client.Tools.dll" contains functions specific to your company's PDM Administrator. Therefore, it must be copied ONLY once to the PDM Administrator's computer. If you need to use these special functions - our support will inform you.

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

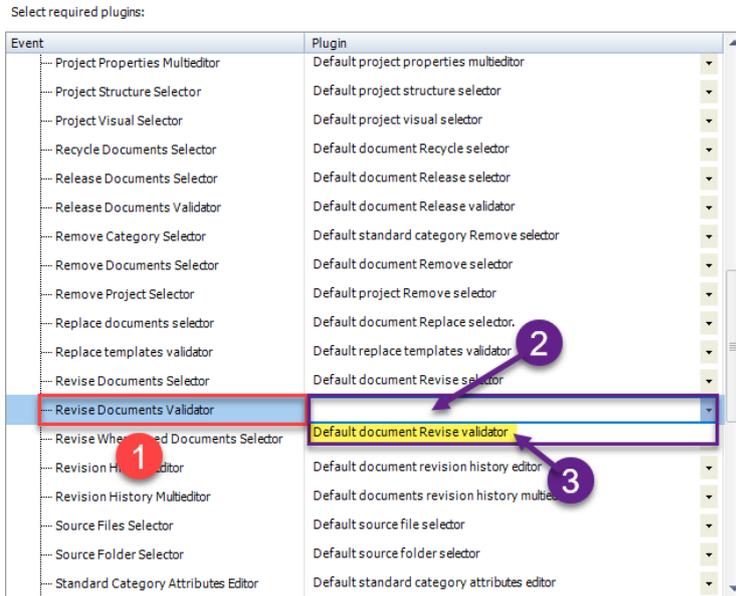
Each installation may also bring new settings to the Client Admin. You will need to manually configure these settings.

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.

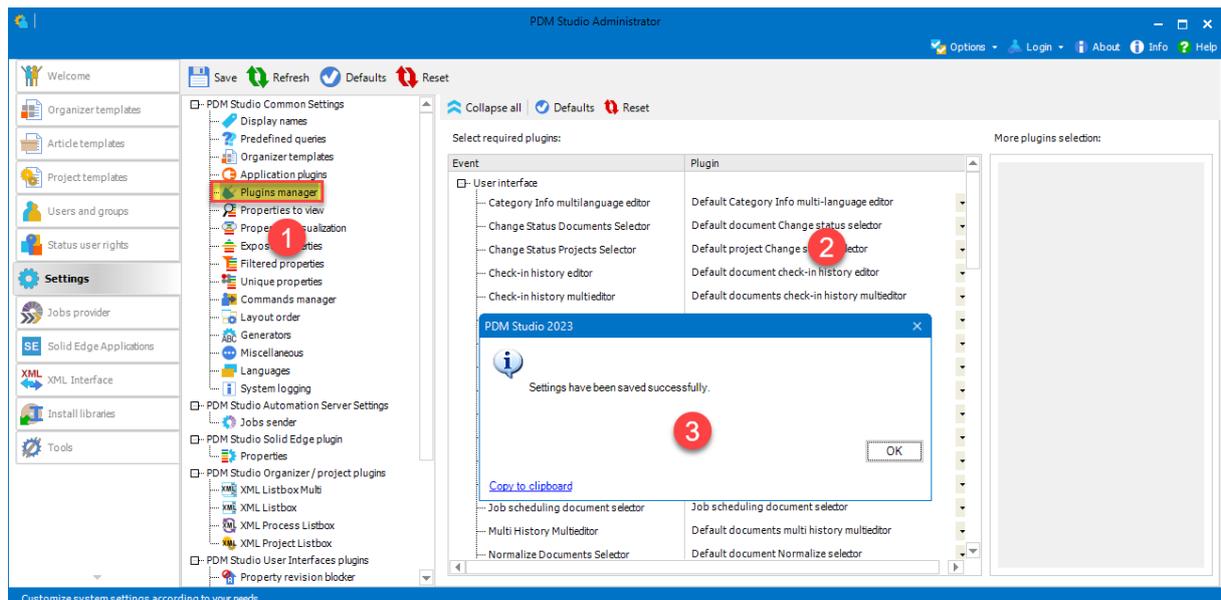
Expand the Event where the Plugin is located, in our example "User interface" and scroll down until you see the mentioned Plugins (image above (3)) "Release Documents Validator" (image below (1)).



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
Event Plugin	Automation job sender event plugin is supported now also for Update documents wizard.
PDM Studio	The Check-in history wizard is started for documents with appropriate Organizer template when checked-out documents should be checked-in before starting a wizard.
PDM Studio	Check-out structure wizard shows and validates complete structure.
PDM Studio API	Introduced a new API method for getting all exposed properties in the format defined in settings and by plugins.
XML Interface	Added support for PDM Studio Static Structure panel introduced in MP4 via XML Interface.

Improvements:

Module	Description
General	Added validation of dialogs positions during starting. If the position is out of monitor the dialog appears in default one.
General	Added validation of dialogs positions when starting. It caused issues when e.g. number of monitors was changed.
Installation	NX configuration is updated and not overwritten during XMLI upgrade setup.
Migration	Initialization progress of migration recovering is now reported and handled by status bar.
PDM Studio	Improved Update where used wizard started for obsolete document with last revision in working status. During update process is working document released and used in update operation.
PDM Studio	Update wizard can resolve out-of-date links of document in working status.
PDM Studio	Added detailed logging to Update / Update Where Used documents wizards.
PDM Studio	Improved performance of displaying graphical navigation of standard categories.
SE / SWX Integration	Improved the release process from SE/SWX integration. When a document from released structure is opened then is automatically closed.
SE / SWX Integration	Previously closed document during check-in-close command is opened again when Check-in History wizard is cancelled.
Server Administrator	Improved message about necessity of restarting PDM Studio Server when a command is started in Server Administrator working with PDM Server data.
Solid Edge Plugin	Improved reading links of whole structure during check-in process. Calling of Design Manager has been optimized.

XML Interface	Added possibility for checking if a document is managed by PDM Studio.
XML Interface	Added support for UpdateAttributesRequest XML Interface command.
XML Interface	Unified exposing properties values with PDM Studio settings via XML Interface commands.

Changes:

Module	Description
General	Changed limit for expiration license warning from five to seven days.
PDM Studio	Incomplete geometry version can be resolved or ignored now in Release wizard validation step.
PDM Studio	Changed selection rules: enhanced validation in Copy Project wizard. Disabling a sub-project cause disabling of all its ancestors appropriate tooltip.
XML Interface	XMLInterface provides history data only via WriteProperties in compliance with Client Admin plugins

Repaired Bugs:

Module	Description
Automation plugin	Optimized reading properties and occurrences in "Up to date info updater" Automation plugin when reading fails via opened document. Document is opened separately. Such cases is no longer logged as warning.
Automation plugin	Fixed saving NX documents like JT via NX Save As plugin.
Automation plugins	Fixed getting documents from the PDM Studio Server(when documents are not in the local file cache) in Automation plugins Get structure, Get non-master, etc.
Automation plugins	Fixed an exception when loading the Automation plugins Clear cache and Ensure settings.
Installation	Fixed PDM Studio Server setup upgrading when "License Server" option is activated.
Log Reader	Fixed displaying in the multi-column argument mode in Log Reader application.
Log Reader	Fixed copied values by command "Copy row" to clipboard in Log Reader application.
Migration	Fixed cancelling of migration snapshot creation. There must be cancelled the whole process that means creating snapshot and also analyze phase.
Migration	Fixed migrating of standard parts when production version of application plugin is set: Standard parts were migrated as foreign ones.
Migration	Fixed unwantedly creating snapshot before transfer phase after restarting migration between analyze and transfer phases.

MSO integration	Fixed the filename of MS Office log file integration to "PDMStudioAPIProvider.exe@MSOffice.Ribbon.sxlog".
P&ID integration	Fixed editing of document properties via Part Organizer into P&ID.
P&ID integration	Fixed failing PDM Studio check-in process for P&ID files.
Part Keeper	Fixed global uniqueness check in special situations connected with capital letters.
Part Keeper	Fixed updating unmanaged standard parts via Part Keeper.
Part Organizer	Fixed editing on Part Organizer panels when edited document is in an archive state and is placed to a project. All panels except process properties are read-only now.
PDM Studio	Fixed checking the permission for revising standard categories when Revise standard category wizard is started. It has been checked too late in finish process before.
PDM Studio	Fixed the out-of-date document validation in Revise / Update where used wizards in special situation when a root document contains two the same links with different revisions.
PDM Studio	Fixed an exception when a property values visualization is set for values displayed the same in PDM Studio like e.g. numbers differ in decimal point (0,99 and 0.99).
PDM Studio	Fixed the right displaying of checked-out documents in green in Query Result panel.
PDM Studio	Fixed displaying of Organizer history configurations in the Update where used document wizard in Organizer step.
PDM Studio	Fixed displaying an Automation context menu in Navigator of PDM Studio Reader.
PDM Studio	Fixed creating a new standard category that differs from another category only in the last category leaf name when an old revision of differ category exists with incomplete path.
PDM Studio	Revise Standard Category wizard is no longer started for foreign documents.
PDM Studio	Fixed duplicate starting of Importing Organizer data command in wizards included Organizer step.
PDM Studio	Fixed selection in the first step of Update where used wizard when data contains interpart links. Selection works like in the Revise where used wizard now.
PDM Studio	Fixed the warning message about the status of input document in Revise Where Used and Update Where Used wizards.
PDM Studio	Fixed selection of invalid and obsolete non-master documents in the first step of Copy Document wizard.
PDM Studio	Fixed expanding structures in Query Result panel when Static Structure panel is active.
PDM Studio	Fixed crash when Last revisions button is active and standard category with some inaccessible parts is selected
PDM Studio Reader	Fixed displaying an Automation context menu in Navigator of PDM Studio Reader.

PDM Studio Reader	Fixed displaying the Favorites in context menu for documents, articles, projects and categories to PDM Studio Reader.
SE/SWX/MSO integrations	Fixed missing logging of commands starting for SE / SWX / MSO integrations
SWX integration	Fixed managing of SOLIDWORKS integration logging by option.
XML Interface	Fixed exposing of revision history entries from document Organizer template.
XML Interface	Wrongly friendly files support has been removed from XML Interface.

Imprint



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