



PDM Studio

What's new 2023 | EN | MP 08

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Introduction

PDM Studio 2023 MP08 is a maintenance release of PDM Studio. It contains bug fixes and some enhancements.

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

Note: Please also read the document "ReadmePDM2023MP08.txt" in the "Documents\EN" directory of your MP08 installation files. This document lists the ticket numbers of the solved tickets in MP08.

For more information on **how to install the V2023 MP08**, please read the following document:

["PDMStudio_Installation_2023_EN.pdf"](#)

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

Licensing 2025

A new version of licensing, version 2025, has been introduced with PDM Studio version 2023 MP08.

Supported Operating Systems:

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

Important: Flexera Licensing no longer supports Windows Server 2012. 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 V2025 Licensing will be automatically installed during the installation of PDM Studio V2023 MP08.

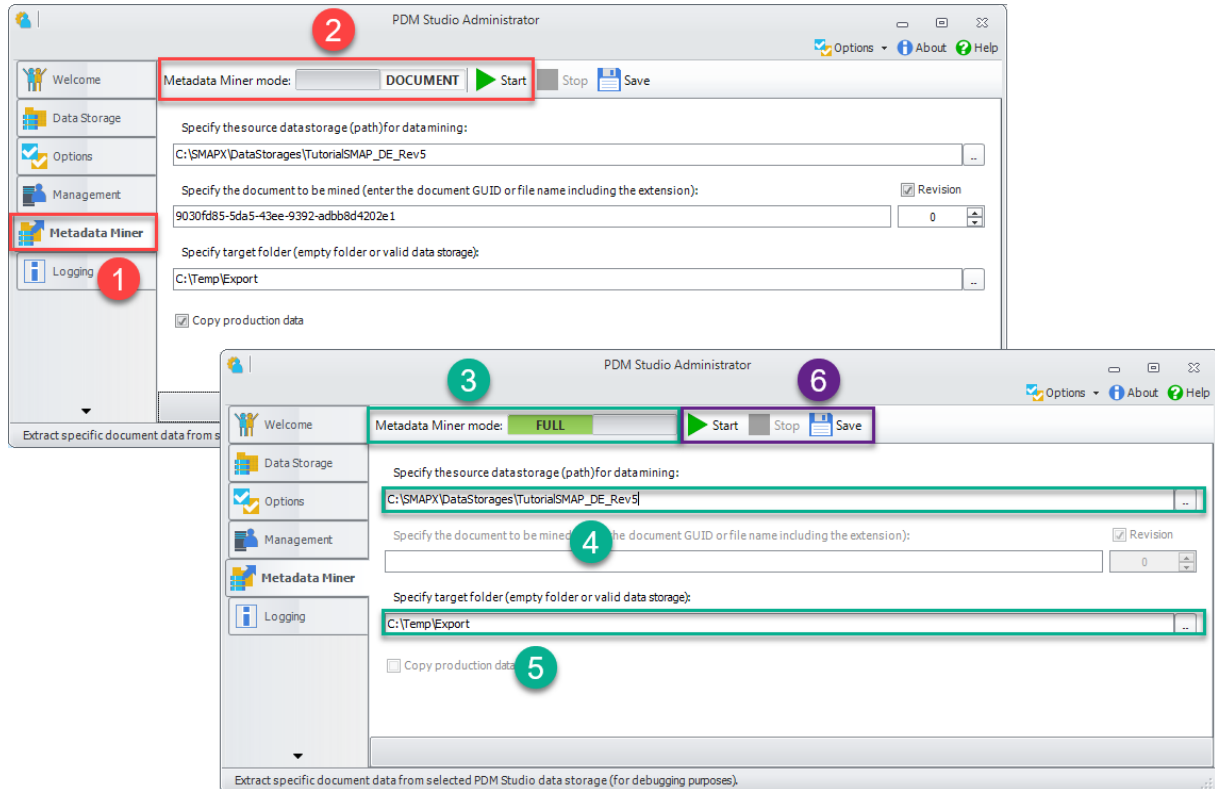
Installation

Important: We strongly recommend that you check in all documents and clear the local cache of all clients before installing PDM Studio V2023 MP08.

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

PDM Studio Server Administrator

Enhancement of the Metadata Miner



In MP08, the existing "DOCUMENT" (2) function in the "Metadata Miner Mode" (2) in the "Metadata Miner" (1) tab of the Server Administrator has been expanded to include the new "FULL" (3) option. This makes it possible to export the entire datastorage - **but without production data** - for analysis purposes.

This improvement allows the development department to perform more in-depth analysis, especially in the case of complex problems. By examining the entire data storage in detail, the causes of malfunctions or system anomalies can be more accurately identified and corrected.

How to use:

1. to use the new option, switch the "Metadata Miner Mode" function (2) to "FULL" mode (3).
2. specify the "Source datastorage" (4) - add a path or browse to the folder where the datastorage is located.
3. specify the "Target folder" (5) - Use an empty folder as the target location.
4. Start the mining process with "Start" (6) - an archive file (.7z) named after the source datastorage will be created in the destination folder.
5. the process can be stopped at any time by pressing "Stop" (6).

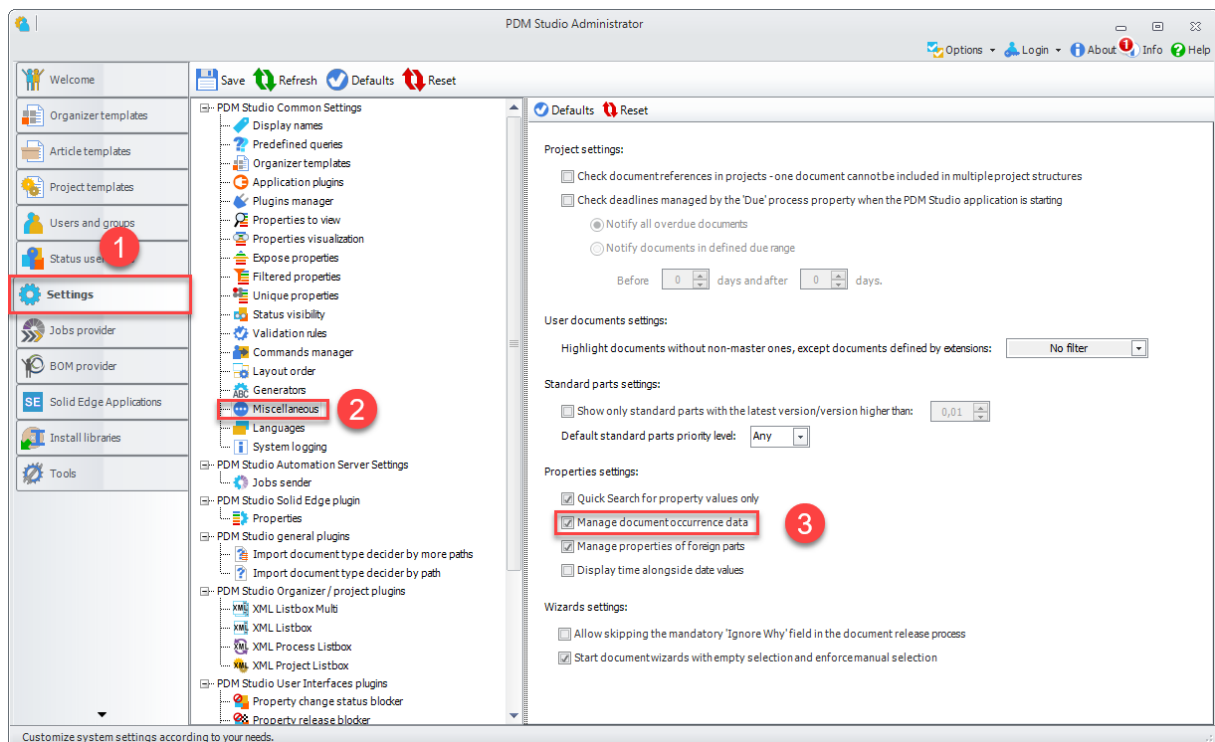
Important: Exporting the entire datastorage without production data can be time-consuming.

PDM Studio Client Administrator

BOM Studio Integration

For the first time, MP08 provides direct integration between PDM Studio and the new BOM Studio. This connection enables consistent data exchange between the two systems and provides the basis for more efficient management of design and BOM data.

Seamless synchronization ensures that all relevant information remains consistent and up-to-date, reducing sources of error and optimizing the entire product development process.



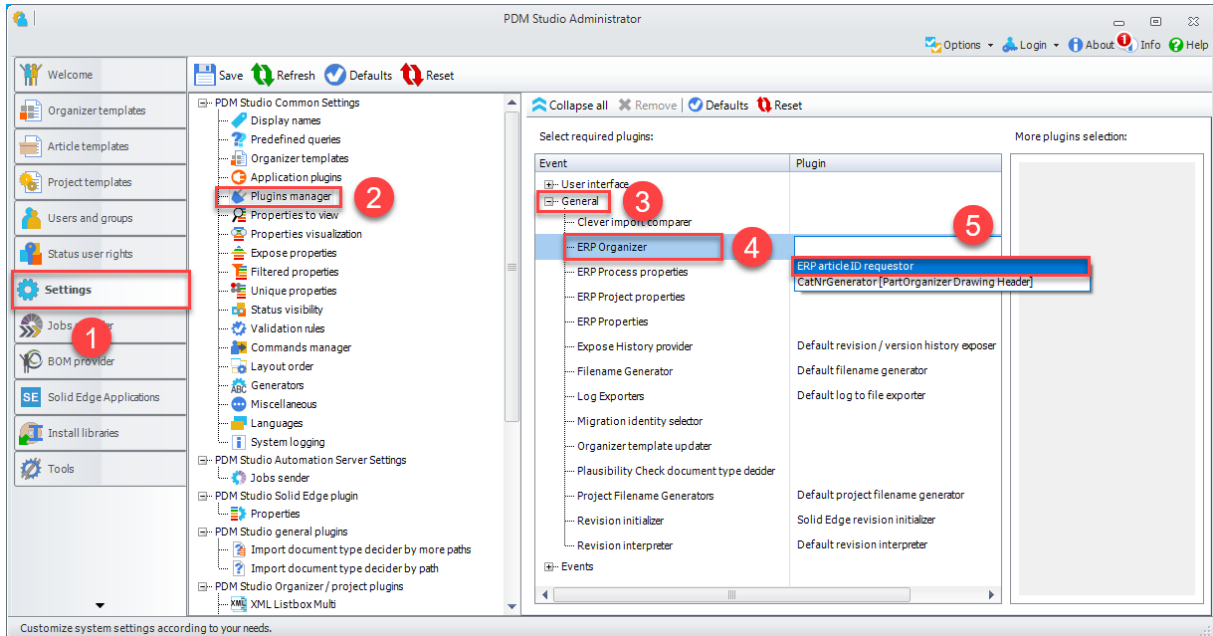
In the "Settings" (1) section, a new option "Manage document occurrence data" (3) has been added to the "Miscellaneous" (2) section for integration with BOM Studio.

If this option is enabled, the ".sxapp" files required for the exchange will be automatically created for all 3D documents saved in Solid Edge (saving in Solid Edge native and saving in the PDM system).

Important: Changing the option in the Client Administrator requires a restart of Solid Edge. Otherwise, the previous setting will remain in memory.

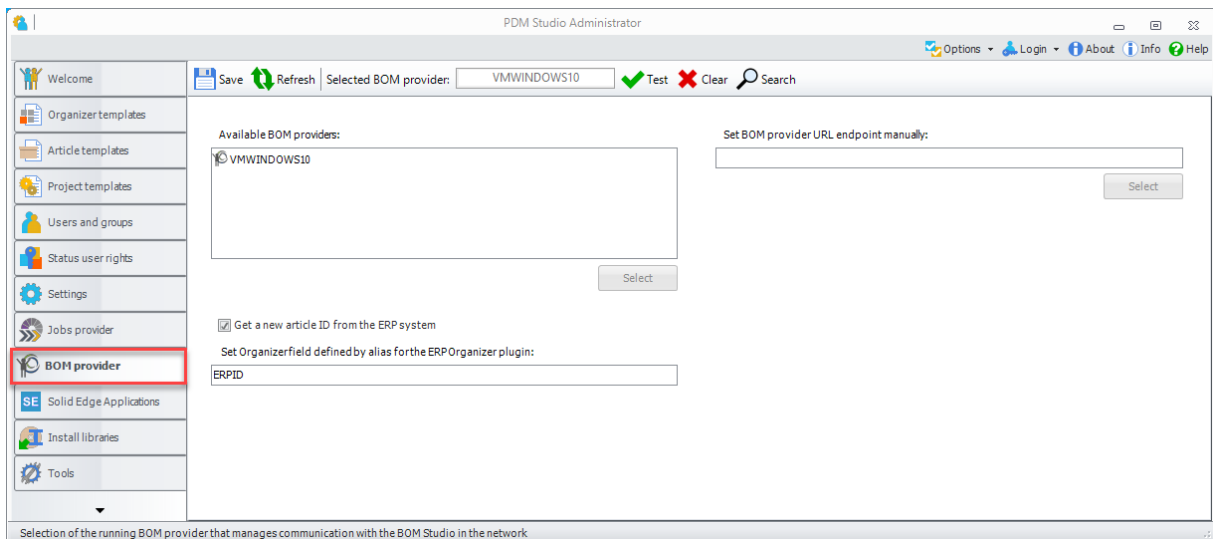
Very important: This setting must ONLY be set if the PDM Studio ERP coupling runs via BOM Studio.

To enable the ERP function for "Requesting a new article ID from the ERP system via the BOM Studio application" in the PartOrganizer and Partkeeper of PDM Studio, it is also necessary to set the "ERP article_ID requestor" (5) setting in Settings (1) > Plugin Manager (2) > General (3) > ERP Organizer (4).



BOM Provider

This section only applies in conjunction with the BOM Studio application.



The BOM Provider tab specifies an active PDM Studio Translator - a process that connects BOM Studio to PDM Studio and enables seamless integration between the two systems. This translator provides communication between PDM Studio client applications and BOM Studio.

Note: To configure the connection, the PDM Studio Translator process MUST be set up and running.



BOM Provider Configuration

To configure a BOM provider, you have the following options:

- **Selected BOM provider** - Displays the currently selected PDM Studio Translator. You can:
 - Choose from the **available BOM providers** list (populated after using **Search**). Click **Select** to confirm your choice.
 - **Add** a provider manually by entering the PDM Studio Translator URL. Click **Select** to confirm.
- 🔍 **Search** - Scans the local network for computers with a running PDM Studio Translator, and populate the list of available BOM providers.
- ✖ **Clear** - Delete the **selected BOM provider field** and cancel the connection.
- ✓ **Test** - Verify communication with the selected PDM Studio Translator.
- 💾 **Save** - Confirm and save the selected BOM provider.
- 🔄 **Refresh** - Reload the previously saved settings.

Note: The saved PDM Studio Translator applies to all PDM Studio users.

Additional Settings

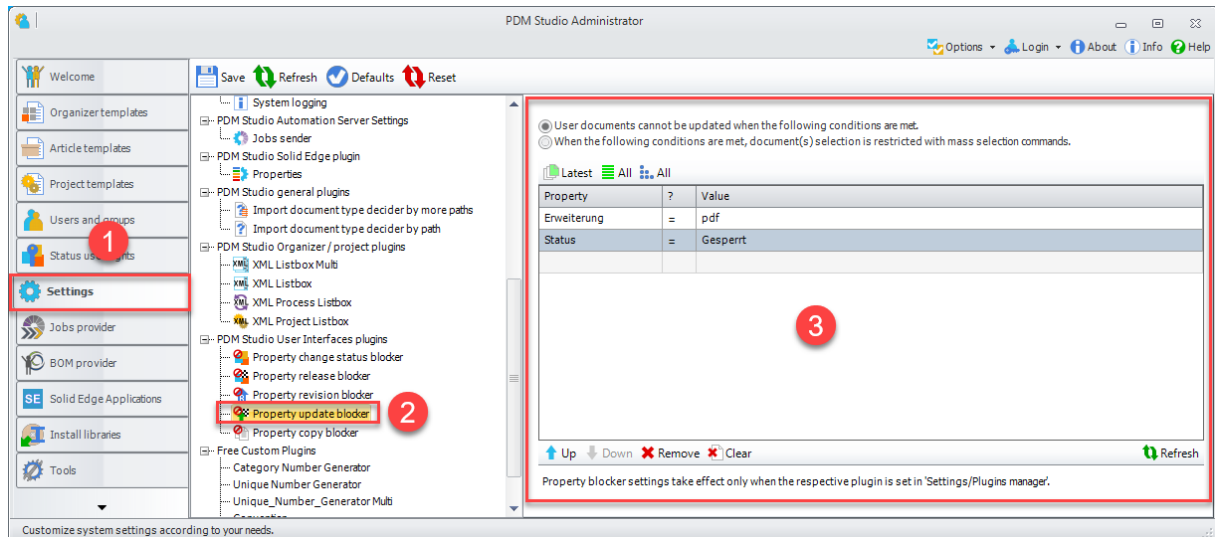
Get a new article ID from ERP System - Allow requesting a new article ID from the ERP system connected via PDM Studio Translator. Click ERP to issue the request. To do this, click on the "ERP" function in the PDM Studio Organizer or Partkeeper to send the request to the ERP system.

Set Organizer field defined by alias for ERP Organizer plugin - Define the Organizer entry (alias) where the ERP system inserts the article ID.

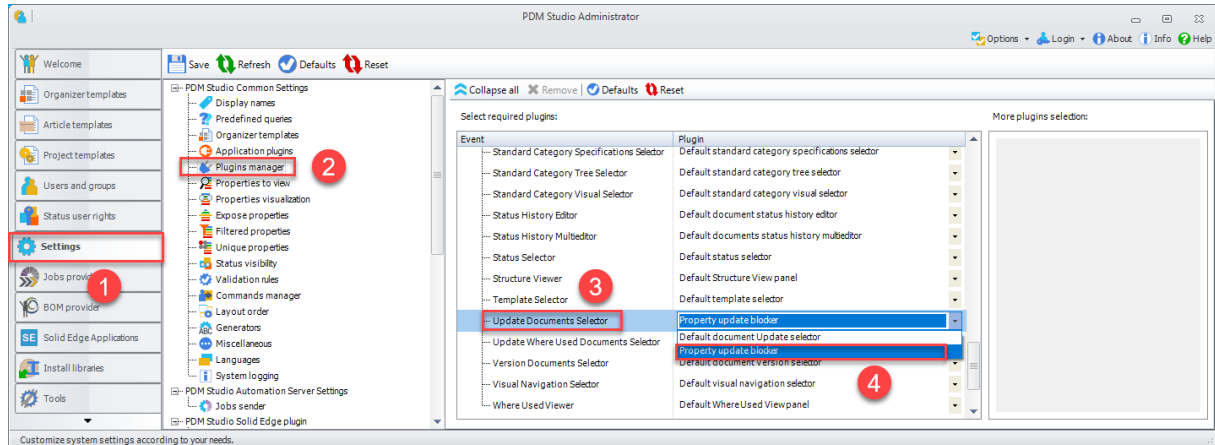
Note: A valid plugin must be configured for ERP Organizer in the General section of Plugins Manager.

Property update blocker

With MP08, a new PDM Studio user interface plug-in for "Block Updates via Properties" (2,3) has been introduced in the Settings (1).



If the settings are activated and the required conditions are met (3), the document cannot be "Updated" in PDM Studio.

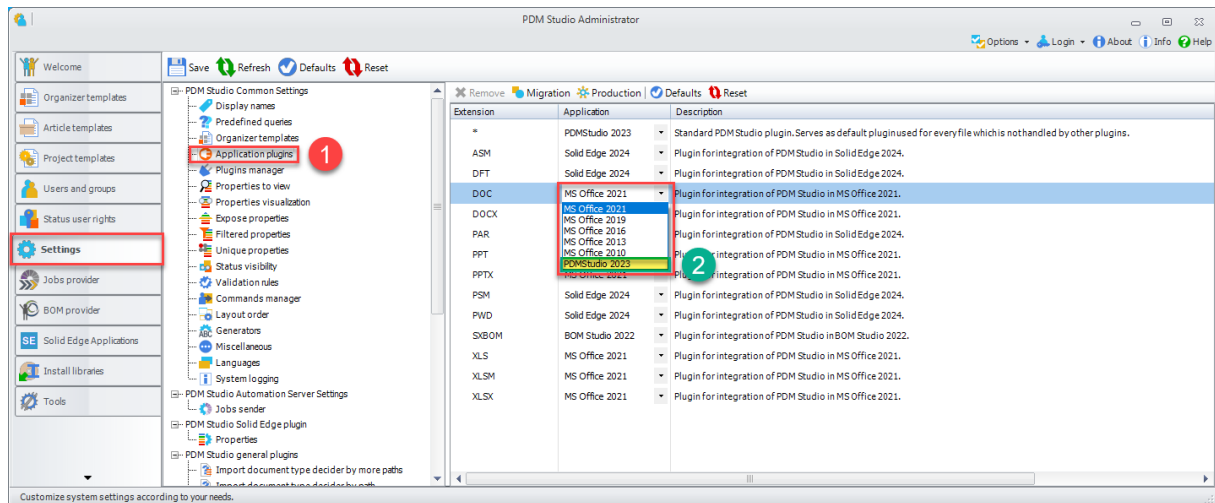


In addition, the option "Property update blocker" (4) in the event "Update documents selector" (3) in the Settings (1) > Plugin Manager (2) > User Interface must be set for correct functioning. To do this, click on the plugin's drop-down list (right column) and change the plugin's setting to "Property update blocker" (4).

Note: If you do not change the plugin setting in the Plugin Manager (all plugins remain on default), the user interface plugins will have no effect on the handling of documents.

For more information, see [Extending the Update Function](#) in PDM Studio.

Changing the assignment of application plug-ins



Starting from MP08, it is now possible to change the **default assignment of application plugins** (1) if needed. The application “PDMStudio 2023” (2) has been added as an additional option.

Note: If the application “PDMStudio 2023” (2) is set for the file extension, the document with this file extension will be treated like any other file without special application integration.

This is necessary, for example, when two applications are used on the computer that can both open certain “file extensions” (but only one is supported by PDM Studio with a direct interface) and it needs to be distinguished which application should open the document with the file extension.

Extension	Application	Description
*	PDMStudio 2023	Standard PDM Stuc
ASM	Solid Edge 2023	Plugin for integrati
DFT	Solid Edge 2023	Plugin for integrati
DOC	MS Office 2021	Plugin for integrat
DOCX	MS Office 2021	Plugin for integrat
DWG	Inventor Universal	Inventor XML Inter
IAM	Inventor Universal	Inventor XML Inter
IDW	PDMStudio 2023	Inventor XML Inter
IPN	Inventor Universal	Inventor XML Inter
IPT	Inventor Universal	Inventor XML Inter

Example: The computer has Autodesk Inventor and Autodesk AutoCAD installed. While there is a direct interface to Autodesk Inventor, there is no such direct link to AutoCAD. By default, Inventor opens “DWG” files in PDM Studio.

If I want “DWG” files to continue opening with **AutoCAD**, I select the application “PDMStudio 2023” in the settings for the “DWG” file extension. This ensures that when a “DWG” file is opened in PDM Studio, AutoCAD, and not Inventor, is launched.

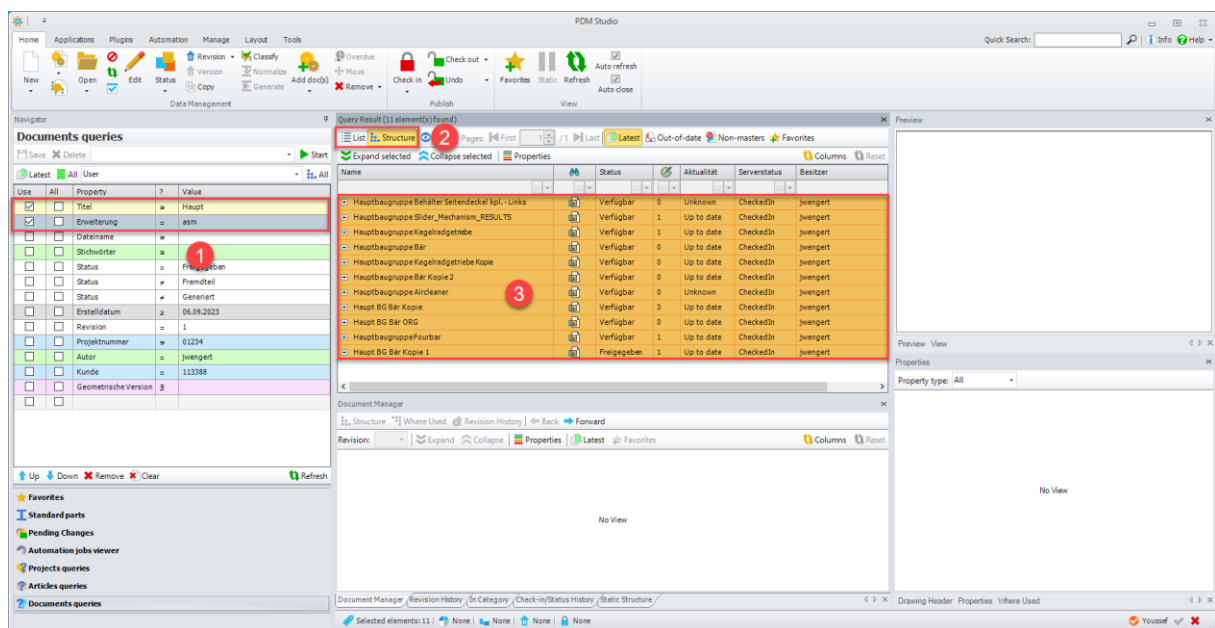
PDM Studio

Extended "copy and paste" of query results as tables in other applications

MP06 introduced the ability to copy the contents of any window in PDM Studio to the clipboard (so that it can be pasted into other applications for further editing). This option has been enhanced with MP08. It is now possible to copy query results in PSM Studio either with a header using "CTRL + E" or without a header using "CTRL + C".

A typical use would be to run a query in PDM Studio and then "Copy" the query result to Excel.

Copying in general:



To "Copy" the results, **first perform a query (1)** on the documents whose information displayed you wish to **copy (3)**. If the structure is **collapsed in the structure view (3)**, the results of "Copying" from the **list or structure view (2)** will be identical in the target application.

Note: If you want to select several different items, hold down the **CTRL key** and (while holding down the CTRL key) "left click" on the items you want to select. Click all the items you want to select one after the other. The items do not have to be next to each other in the list. To "deselect" a selected item, "left click" on the selected item again while holding down the **CTRL key**. It will no longer be selected.

If you want to select a series of adjacent items, you can use the **SHIFT key**. First click on the first item in the row, then hold down the **SHIFT key** and click on **the last item**. All items in the row are now selected and you can **release the SHIFT key**.

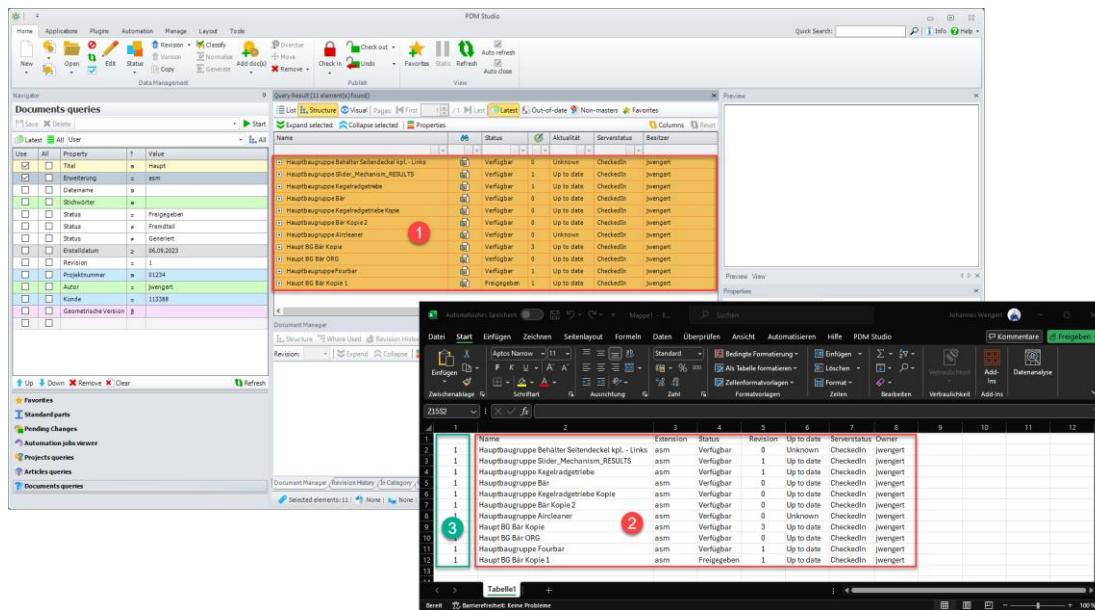
To copy all items in a structure list, expand the entire structure in the query result and then press "**CTRL + A**". This will **select "ALL"** items.

Copy from list or collapsed structure view

To "Copy", select one, several or all cells in the **query result (3)**. Press "CTRL + C" to copy the content without the header or "CTRL + E" if you also want to copy the header.

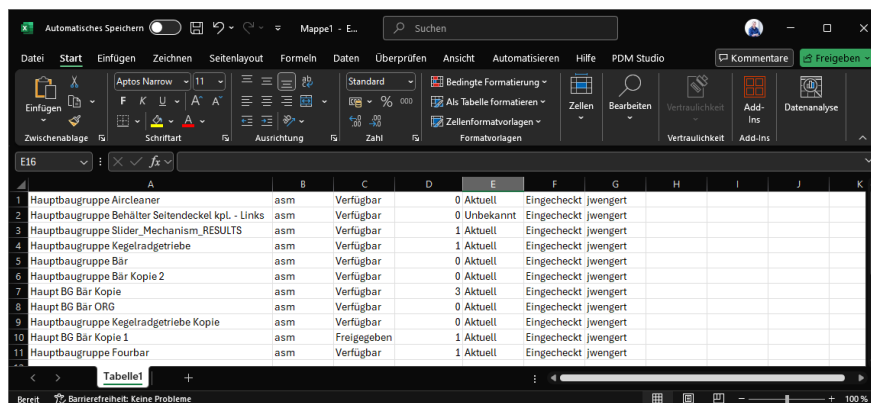
In the following example, the Copy function with header "CTRL + E" was used in PDM Studio.

Switch to the target application, in our case Microsoft Excel. Select a cell in Excel and then press the key combination "CTRL + V".



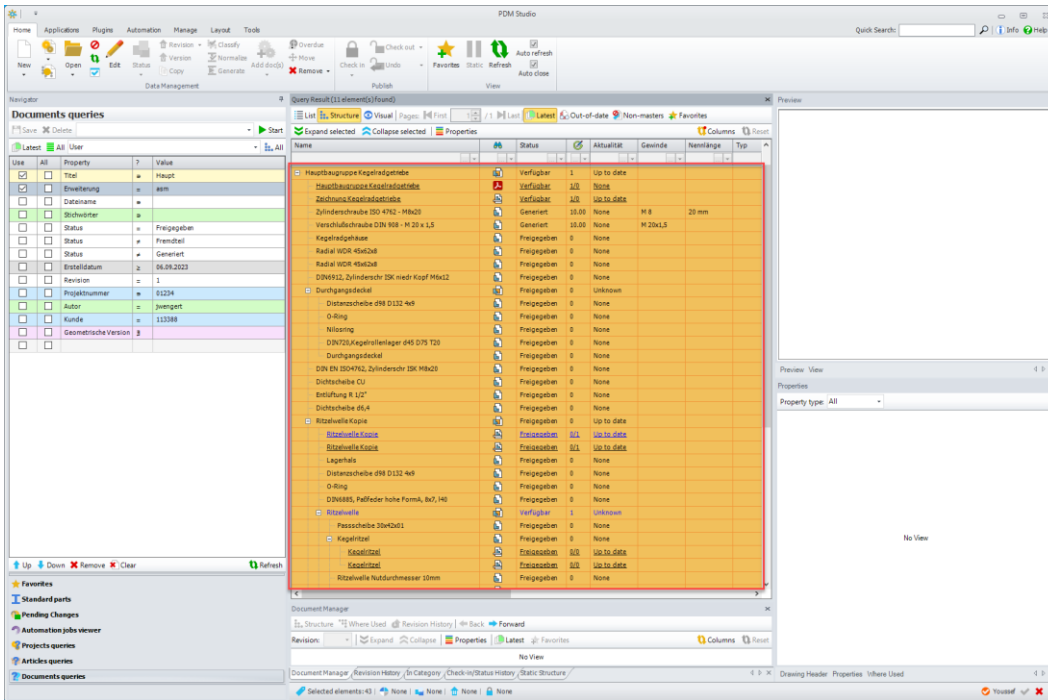
As a result, the "Copied list" from the PDM Studio query result (1) is displayed in Excel (2). The number "1" in the first column indicates that all items are in the first level.

Copy in PDM Studio with "CTRL + C", then the result without header looks like the following picture:

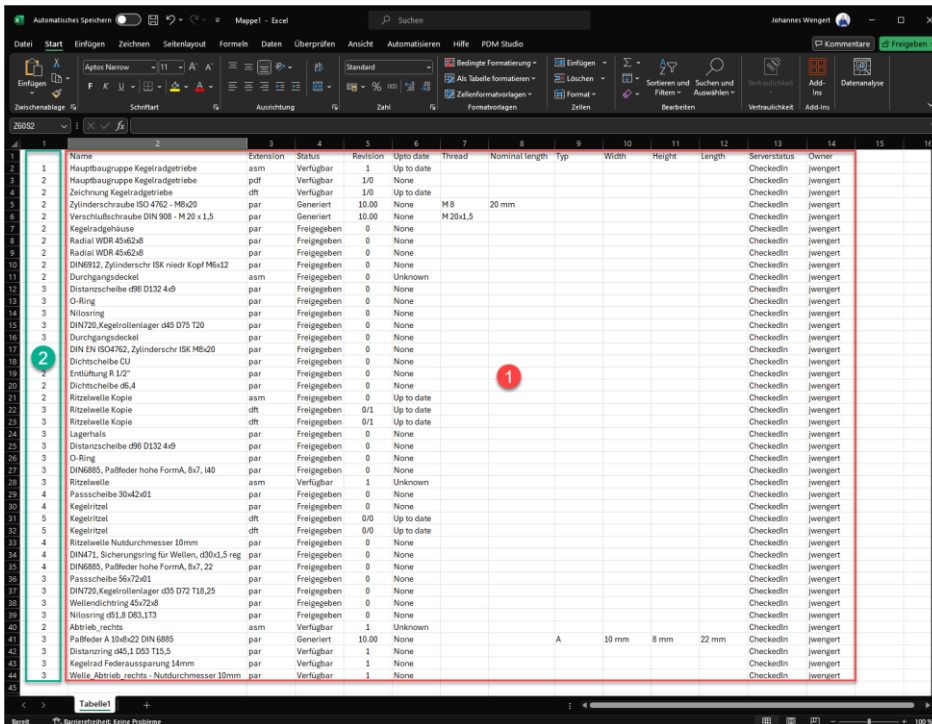


Only the pure entries will be copied.

Copying with expanded structure

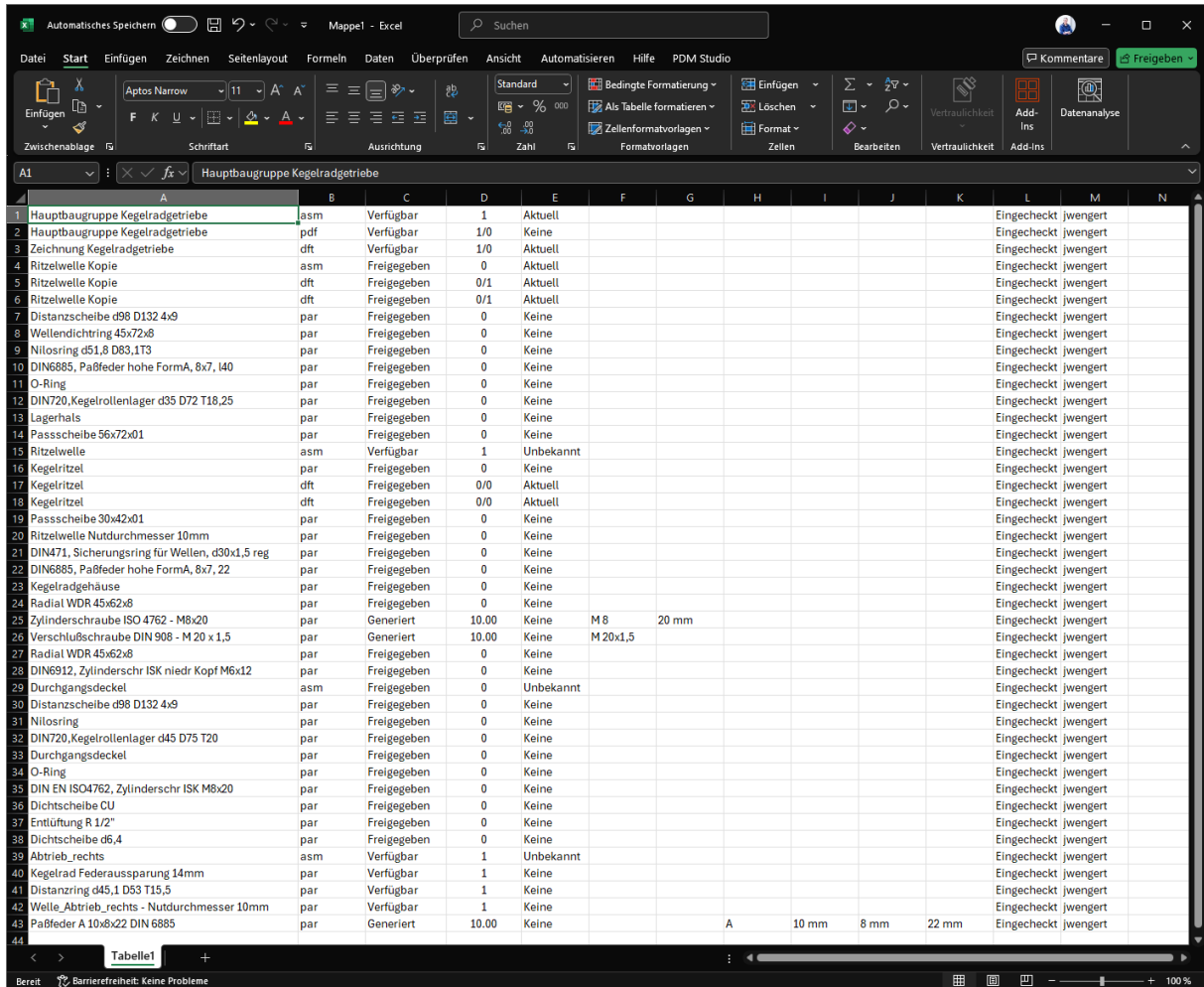


If a root document is fully expanded in the structure view (see previous image) using the "Expand" function, selected, copied with "CTRL+E" and pasted into Excel, the table changes in the Excel output.



All documents in the "Expanded structure" (1) are inserted. The "First column" (2) always shows the level at which the document is located in relation to the root document in the structure.

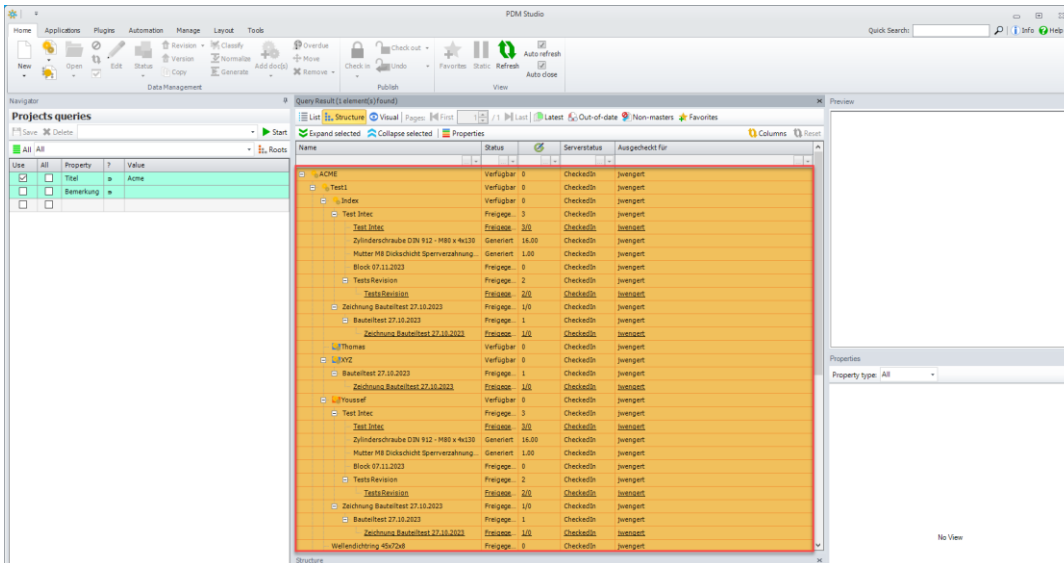
If you copy in PDM Studio with "CTRL + C" instead, the result in Excel looks like this:



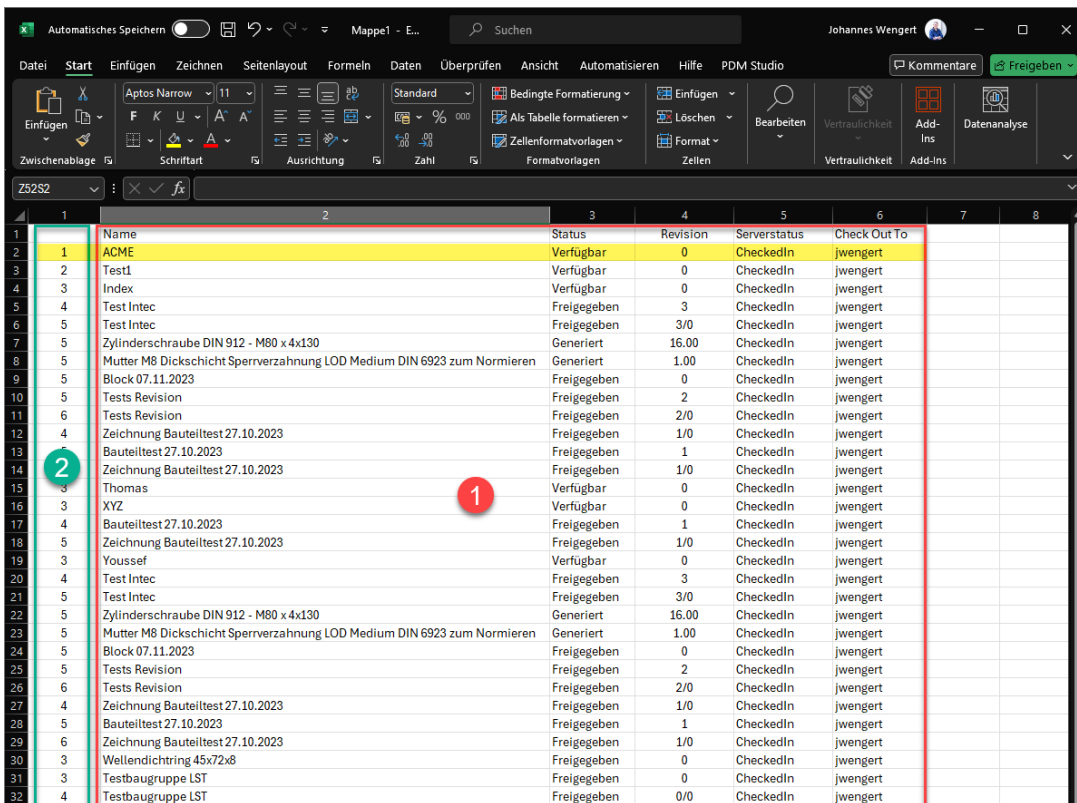
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Hauptbaugruppe Kegelradgetriebe	asm	Verfügbar	1	Aktuell							Eingecheckt	jwengert	
2	Hauptbaugruppe Kegelradgetriebe	pdf	Verfügbar	1/0	Keine							Eingecheckt	jwengert	
3	Zeichnung Kegelradgetriebe	dft	Verfügbar	1/0	Aktuell							Eingecheckt	jwengert	
4	Ritzelwelle Kopie	asm	Freigegeben	0	Aktuell							Eingecheckt	jwengert	
5	Ritzelwelle Kopie	dft	Freigegeben	0/1	Aktuell							Eingecheckt	jwengert	
6	Ritzelwelle Kopie	dft	Freigegeben	0/1	Aktuell							Eingecheckt	jwengert	
7	Distanzscheibe d98 D132 4x9	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
8	Wellendichtring 45x72x8	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
9	Nilosring d51,8 D83,1T3	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
10	DIN6885, Paßfeder hohe FormA, 8x7, 140	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
11	O-Ring	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
12	DIN720, Kegelrollenlager d35 D72 T18,25	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
13	Lagerhals	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
14	Passscheibe 56x72x01	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
15	Ritzelwelle	asm	Verfügbar	1	Unbekannt							Eingecheckt	jwengert	
16	Kegelritzel	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
17	Kegelritzel	dft	Freigegeben	0/0	Aktuell							Eingecheckt	jwengert	
18	Kegelritzel	dft	Freigegeben	0/0	Aktuell							Eingecheckt	jwengert	
19	Passscheibe 30x42x01	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
20	Ritzelwelle Nutdurchmesser 10mm	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
21	DIN471, Sicherungsring für Wellen, d30x1,5 reg	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
22	DIN6885, Paßfeder hohe FormA, 8x7, 22	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
23	Kegelradgehäuse	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
24	Radial WDR 45x62x6	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
25	Zylinderschraube ISO 4762 - M8x20	par	Generiert	10.00	Keine	M 8	20 mm					Eingecheckt	jwengert	
26	Verschlußschraube DIN 908 - M 20 x 1,5	par	Generiert	10.00	Keine	M 20x1,5						Eingecheckt	jwengert	
27	Radial WDR 45x62x6	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
28	DIN6912, Zylinderschr ISK niedr Kopf M6x12	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
29	Durchgangsdeckel	asm	Freigegeben	0	Unbekannt							Eingecheckt	jwengert	
30	Distanzscheibe d98 D132 4x9	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
31	Nilosring	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
32	DIN720, Kegelrollenlager d45 D75 T20	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
33	Durchgangsdeckel	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
34	O-Ring	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
35	DIN EN ISO4762, Zylinderschr ISK M8x20	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
36	Dichtscheibe CU	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
37	Entlüftung R 1/2"	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
38	Dichtscheibe d6,4	par	Freigegeben	0	Keine							Eingecheckt	jwengert	
39	Abtrieb_rechts	asm	Verfügbar	1	Unbekannt							Eingecheckt	jwengert	
40	Kegelrad Federausparung 14mm	par	Verfügbar	1	Keine							Eingecheckt	jwengert	
41	Distanzring d45,1 D53 T15,5	par	Verfügbar	1	Keine							Eingecheckt	jwengert	
42	Welle_Abtrieb_rechts - Nutdurchmesser 10mm	par	Verfügbar	1	Keine							Eingecheckt	jwengert	
43	Paßfeder A 10x8x22 DIN 6885	par	Generiert	10.00	Keine			A	10 mm	8 mm	22 mm	Eingecheckt	jwengert	
44														

You will receive only the clean entries.

Copying project query results

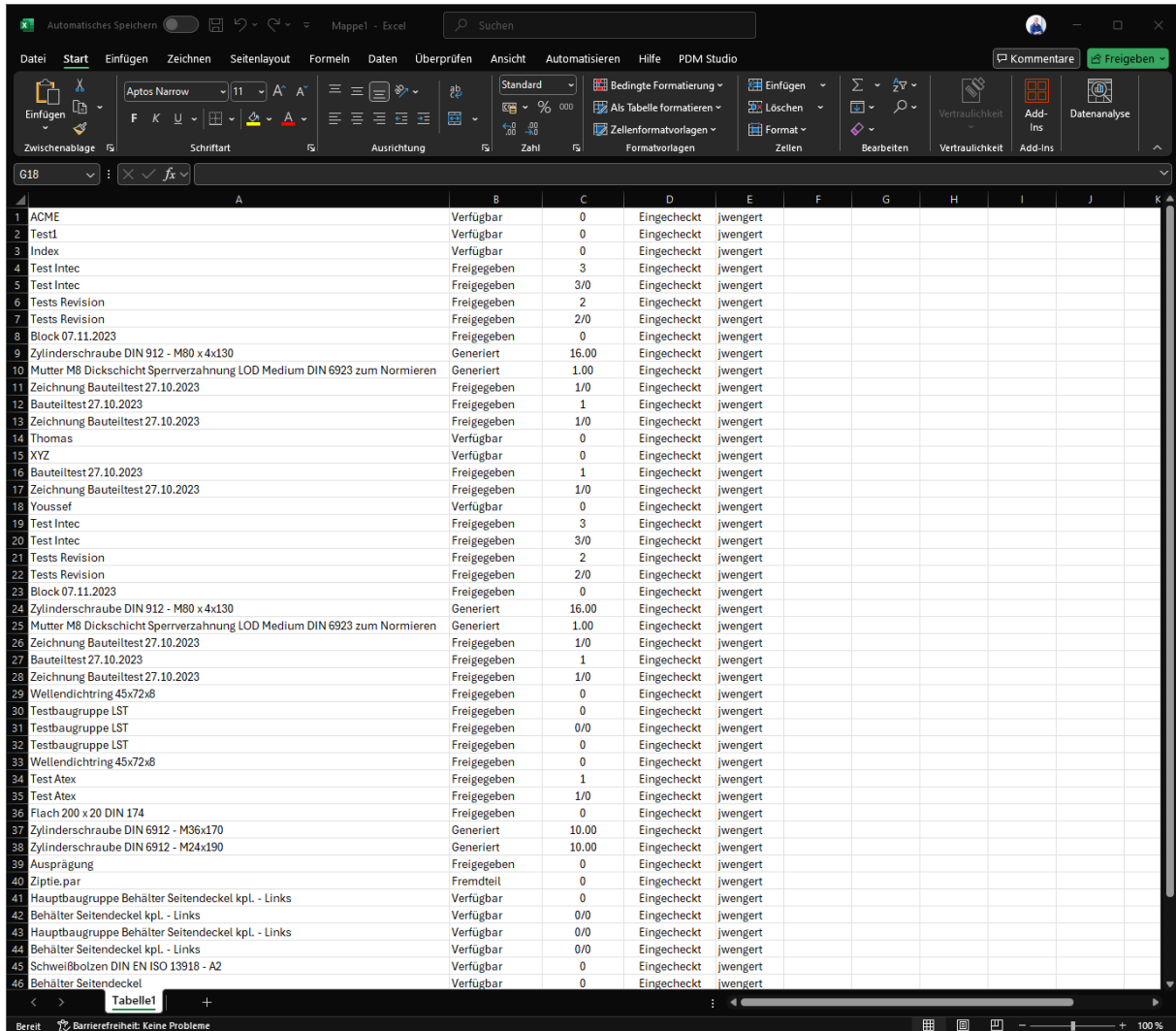


When copying query results from project queries using "CTRL + E", the procedure is identical.



The result of "Copying" the query result in Excel is that the root document (shown as number "1" in the first column) (2) is in this case the selected project and the sub-projects, folders and documents (1) in the first column (2) indicate the level at which the various objects in the structure are located with respect to the root project.

If the selected structure is copied in PDM Studio with "CTRL + C", the result in Excel is as follows:

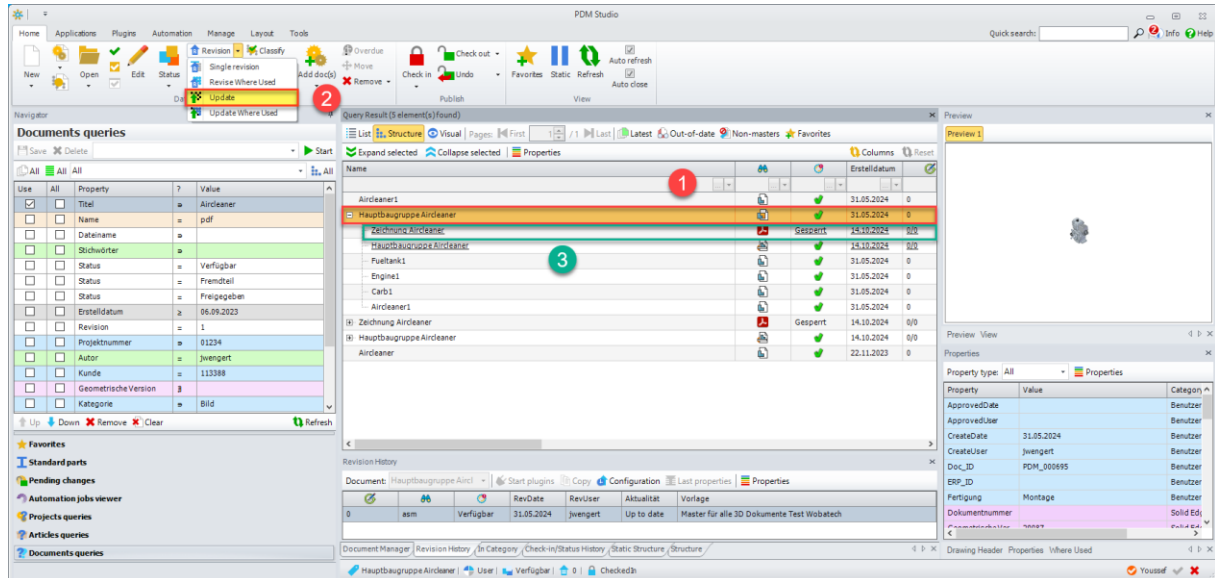


	A	B	C	D	E	F	G	H	I	J	K
1	ACME	Verfügbar	0	Eingecheckt	iwngert						
2	Test1	Verfügbar	0	Eingecheckt	iwngert						
3	Index	Verfügbar	0	Eingecheckt	iwngert						
4	Test Intec	Freigegeben	3	Eingecheckt	iwngert						
5	Test Intec	Freigegeben	3/0	Eingecheckt	iwngert						
6	Tests Revision	Freigegeben	2	Eingecheckt	iwngert						
7	Tests Revision	Freigegeben	2/0	Eingecheckt	iwngert						
8	Block 07.11.2023	Freigegeben	0	Eingecheckt	iwngert						
9	Zylinderschraube DIN 912 - M80 x 4x130	Generiert	16.00	Eingecheckt	iwngert						
10	Mutter M8 Dickschicht Sperrverzahnung LOD Medium DIN 6923 zum Normieren	Generiert	1.00	Eingecheckt	iwngert						
11	Zeichnung Bauteiltest 27.10.2023	Freigegeben	1/0	Eingecheckt	iwngert						
12	Bauteiltest 27.10.2023	Freigegeben	1	Eingecheckt	iwngert						
13	Zeichnung Bauteiltest 27.10.2023	Freigegeben	1/0	Eingecheckt	iwngert						
14	Thomas	Verfügbar	0	Eingecheckt	iwngert						
15	XYZ	Verfügbar	0	Eingecheckt	iwngert						
16	Bauteiltest 27.10.2023	Freigegeben	1	Eingecheckt	iwngert						
17	Zeichnung Bauteiltest 27.10.2023	Freigegeben	1/0	Eingecheckt	iwngert						
18	Youssef	Verfügbar	0	Eingecheckt	iwngert						
19	Test Intec	Freigegeben	3	Eingecheckt	iwngert						
20	Test Intec	Freigegeben	3/0	Eingecheckt	iwngert						
21	Tests Revision	Freigegeben	2	Eingecheckt	iwngert						
22	Tests Revision	Freigegeben	2/0	Eingecheckt	iwngert						
23	Block 07.11.2023	Freigegeben	0	Eingecheckt	iwngert						
24	Zylinderschraube DIN 912 - M80 x 4x130	Generiert	16.00	Eingecheckt	iwngert						
25	Mutter M8 Dickschicht Sperrverzahnung LOD Medium DIN 6923 zum Normieren	Generiert	1.00	Eingecheckt	iwngert						
26	Zeichnung Bauteiltest 27.10.2023	Freigegeben	1/0	Eingecheckt	iwngert						
27	Bauteiltest 27.10.2023	Freigegeben	1	Eingecheckt	iwngert						
28	Zeichnung Bauteiltest 27.10.2023	Freigegeben	1/0	Eingecheckt	iwngert						
29	Wellendichtring 45x72x8	Freigegeben	0	Eingecheckt	iwngert						
30	Testbaugruppe LST	Freigegeben	0	Eingecheckt	iwngert						
31	Testbaugruppe LST	Freigegeben	0/0	Eingecheckt	iwngert						
32	Testbaugruppe LST	Freigegeben	0	Eingecheckt	iwngert						
33	Wellendichtring 45x72x8	Freigegeben	0	Eingecheckt	iwngert						
34	Test Atex	Freigegeben	1	Eingecheckt	iwngert						
35	Test Atex	Freigegeben	1/0	Eingecheckt	iwngert						
36	Flach 200 x 20 DIN 174	Freigegeben	0	Eingecheckt	iwngert						
37	Zylinderschraube DIN 6912 - M36x170	Generiert	10.00	Eingecheckt	iwngert						
38	Zylinderschraube DIN 6912 - M24x190	Generiert	10.00	Eingecheckt	iwngert						
39	Ausprägung	Freigegeben	0	Eingecheckt	iwngert						
40	Ziptie.par	Fremdteil	0	Eingecheckt	iwngert						
41	Hauptbaugruppe Behälter Seitendeckel kpl. - Links	Verfügbar	0	Eingecheckt	iwngert						
42	Behälter Seitendeckel kpl. - Links	Verfügbar	0/0	Eingecheckt	iwngert						
43	Hauptbaugruppe Behälter Seitendeckel kpl. - Links	Verfügbar	0/0	Eingecheckt	iwngert						
44	Behälter Seitendeckel kpl. - Links	Verfügbar	0/0	Eingecheckt	iwngert						
45	Schweißbolzen DIN EN ISO 13918 - A2	Verfügbar	0	Eingecheckt	iwngert						
46	Behälter Seitendeckel	Verfügbar	0	Eingecheckt	iwngert						

You will receive only the clean entries.

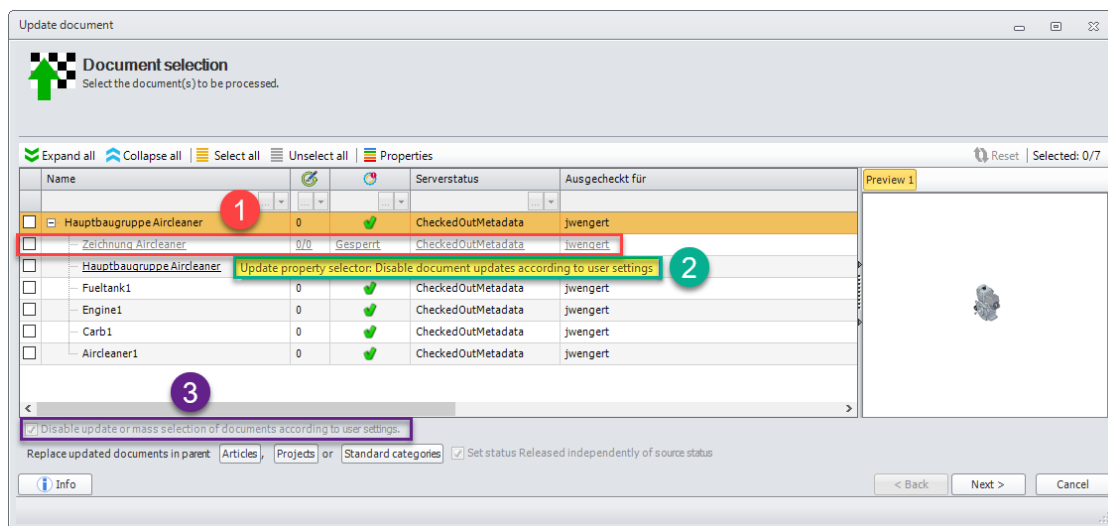
Enhancement of the "Update" function

If the "Property update blocker" rules are defined in the Client Administrator and the User Interface Plugin is set, the properties defined in the Client Administrator to block the update will take effect.



In our example, we have a **main assembly (1)** containing a "PDF file" with the status "Gesperrt (locked)" (3).

When the "Update" function (2) is used on the **main assembly (1)**, the "PDF file" is locked (grayed out) in the wizard.

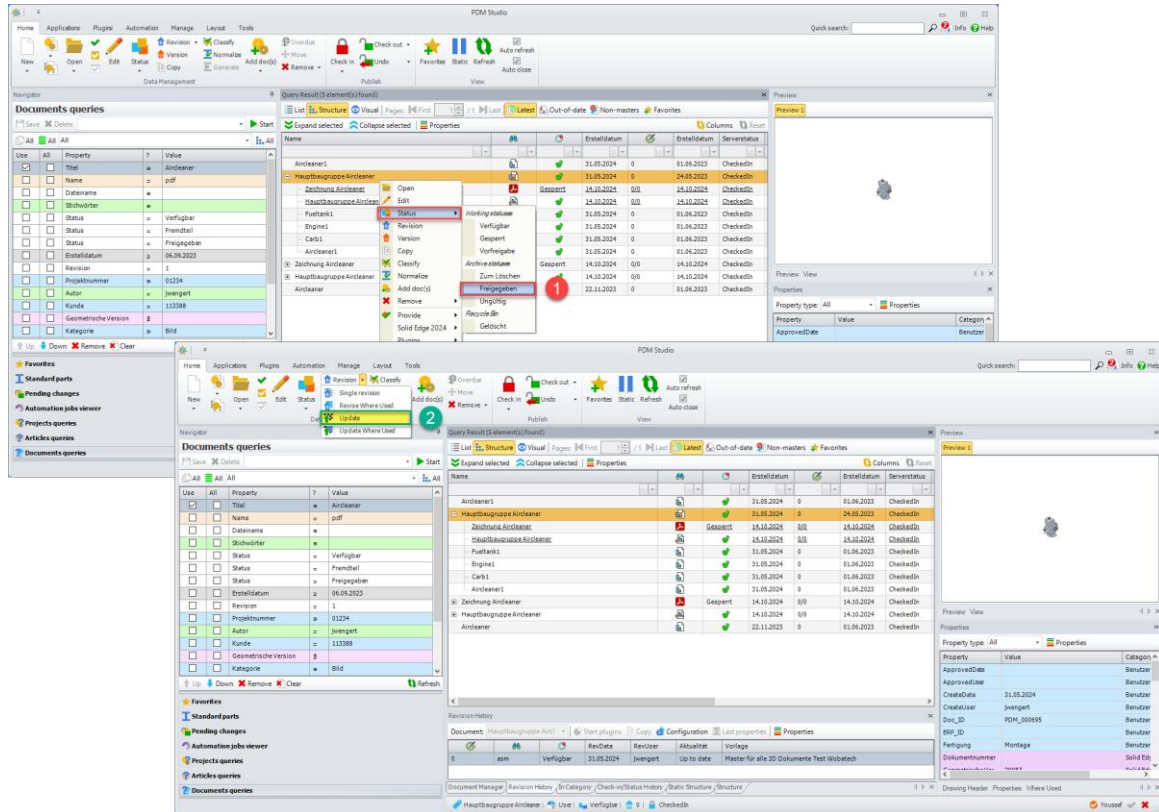


The main assembly and its components can be selected except for the "PDF file" (1). If you move the mouse over the "grayed out PDF file", you will see the reason for the lock (2) as a "tooltip".

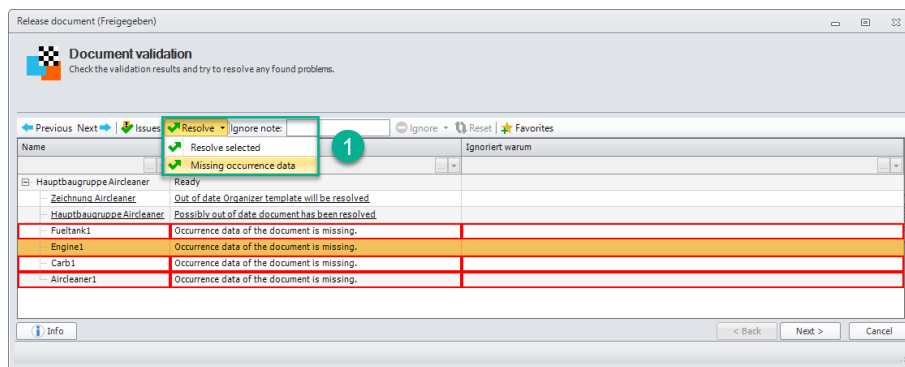
Note: If you are a member of the "ADMINISTRATORS" group, you can use the option (3) to unlock the file if necessary.

Check for missing occurrence data

A check for **missing occurrence data** when connecting to **BOM Studio** has been added to the **Release (1)** and the **Update Wizard (2)**.



If the documents are **"Released" (1)** or **"Updated" (2)**, the documents without **"sxapp"** occurrence data will be listed.



In the Release Wizard example, the missing **"sxapp"** files are listed as **"Occurrence data of the document is missing"** during the check. Clicking on the **"Resolve"** function opens a menu with options to resolve either the selected problem or **"all"** problems of the type **"Occurrence data of the document is missing"**.

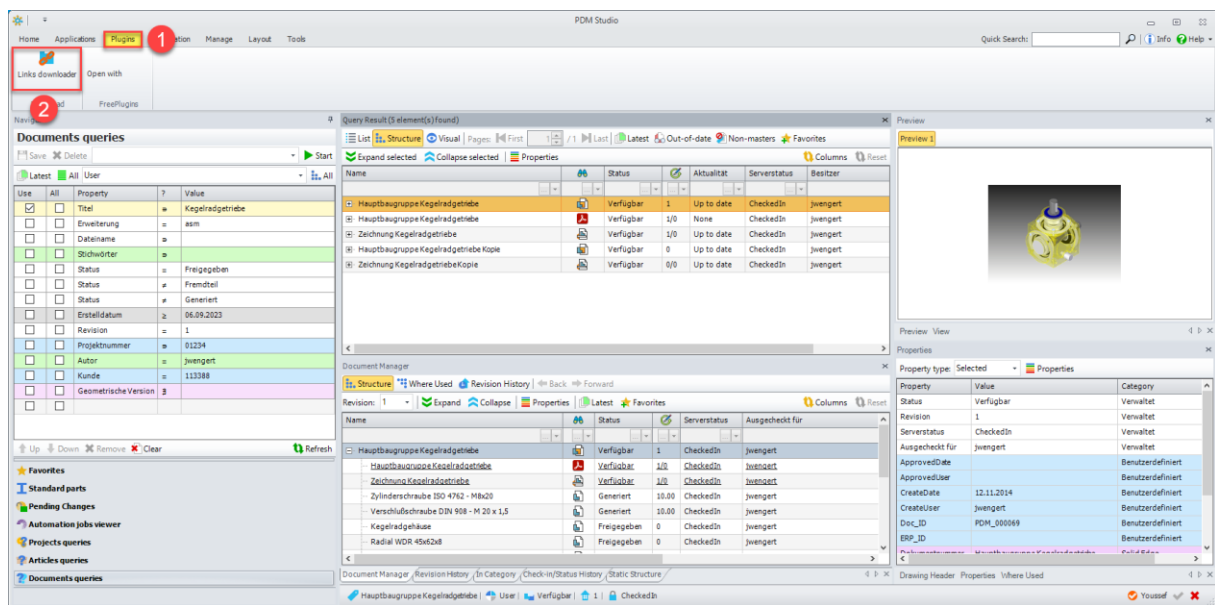
Note: The problem can ONLY be "Resolved" and NOT "Ignored".

Other (Technotes)

Command Plugin "SmapX.Command.Plugins.dll"

The command plugin "SmapX.Command.Plugins.dll" is an add-on for PDM Studio and must be installed separately.

For more information on installing the plugin, refer to the "After installation" chapter under "[Add - Add-on Tools](#)".



If the "SmapX.Command.Plugins.dll" DLL has been added to the PDM Studio installation, the "Links downloader" (2) add-on it contains is available in the "Tools" tab (1) of the PDM Studio ribbon.

This function is related to the use of Solid Edge part families (FOP) in PDM Studio. This means that when this function is used, the FOP parents are downloaded together with the FOP members.

Important: The function is only intended for use in part families (FOPs). If part families (FOPs) are not used in PDM Studio, the "SmapX.Command.Plugins.dll" DLL does not need to be installed.

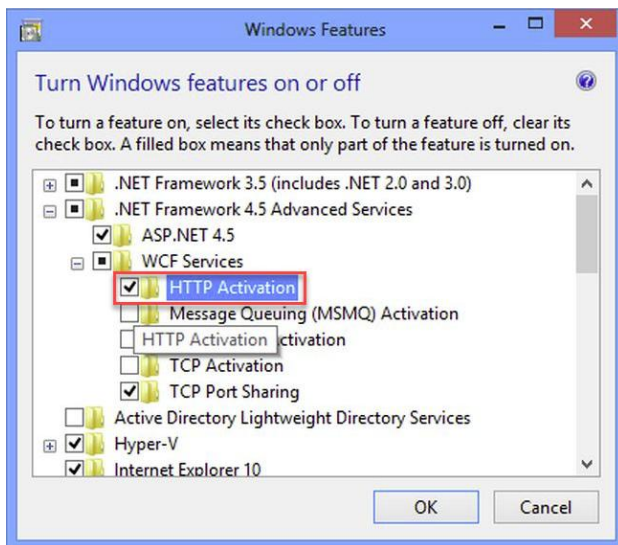
General

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

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

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

However, there is a direct solution to the problem:



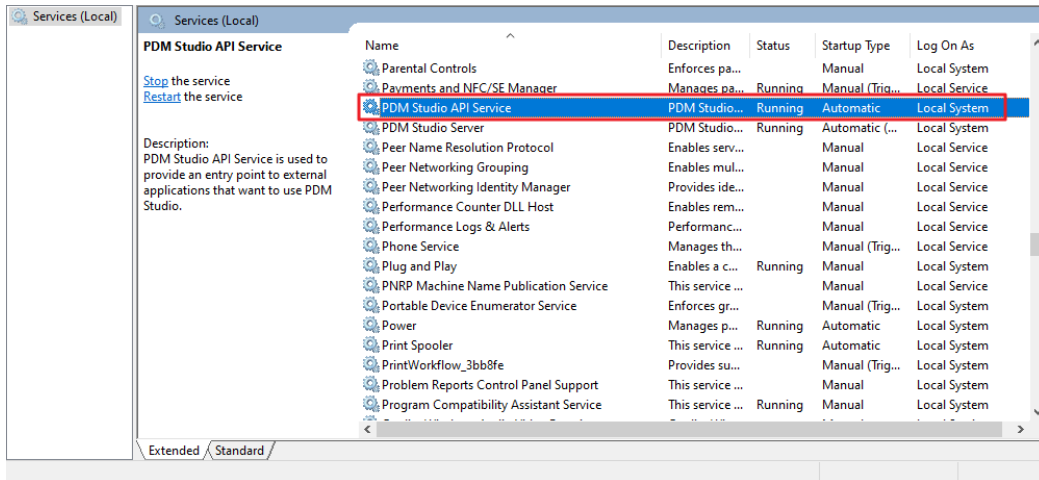
If the **Microsoft .NET Framework 4.8** is installed, go to the **Windows Features** in Windows Settings, and open the "Turn Windows features on or off" settings.

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

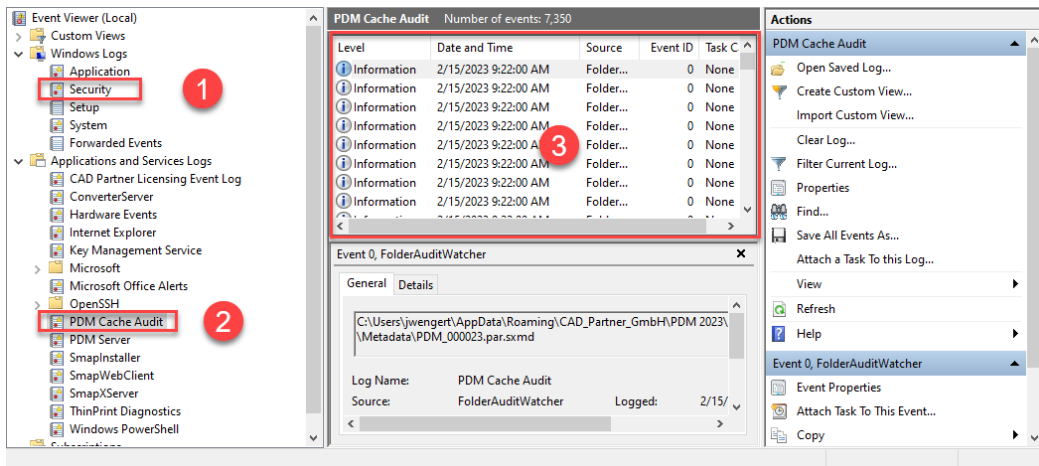
After that, all PDM applications should work again without problems.

Message Cache monitoring could not be initialized

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



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



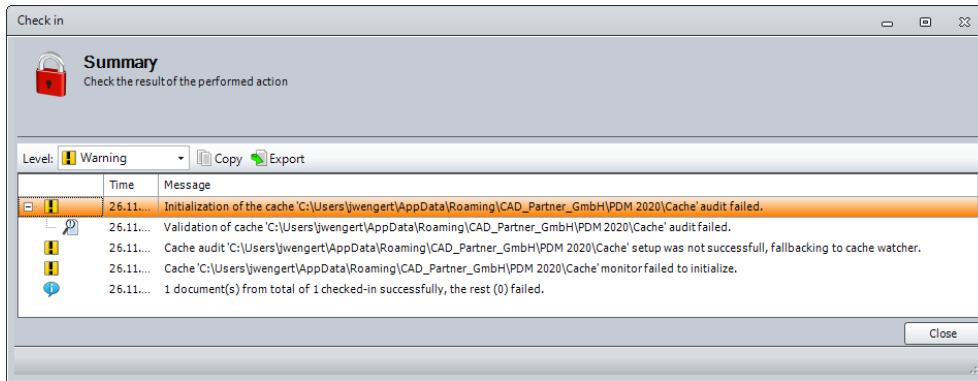
The most important point is that the PDM Studio API service **MUST** have access to the "Security" event log (1).

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 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:



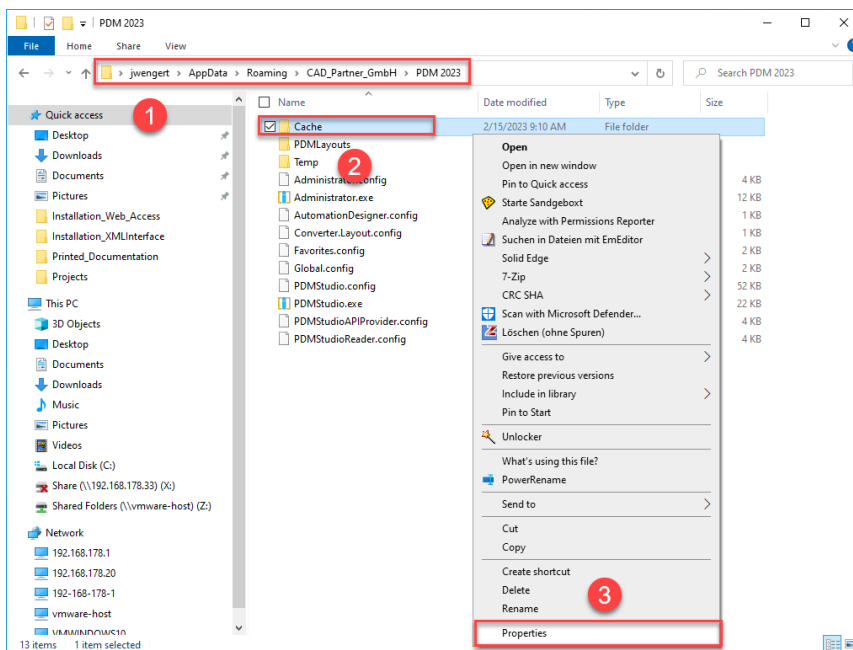
Important: This is because the company's security policy cannot be changed directly from the workstation, but is controlled globally by IT.

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

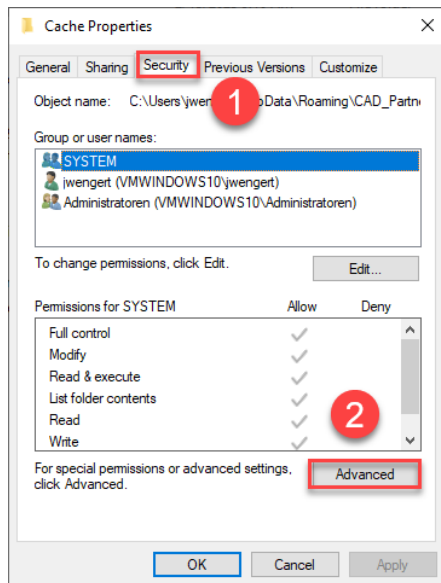
If this happens, check the following Windows settings.:

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

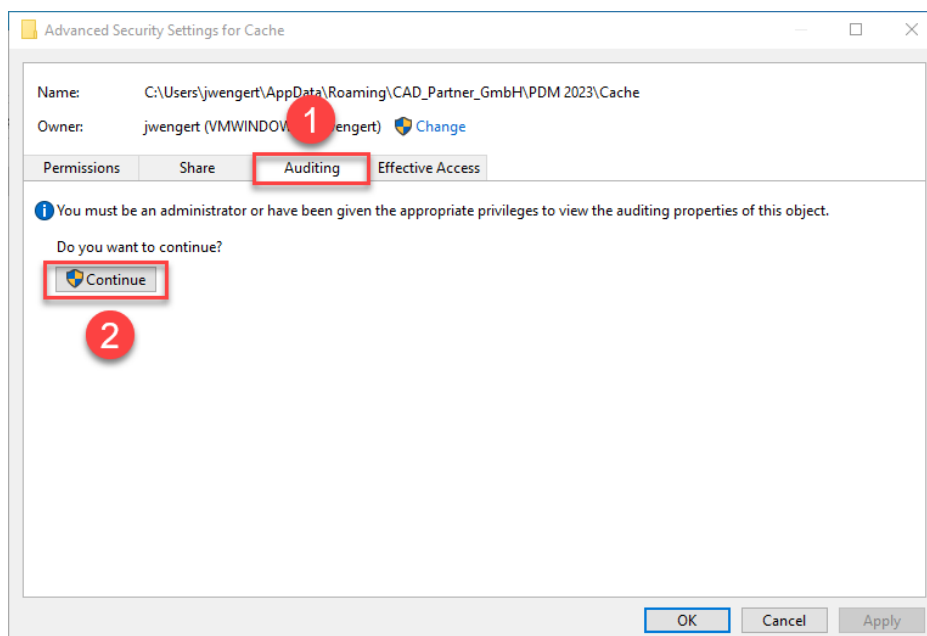
Usually: "C:\Users\[User]\AppData\Roaming\CAD_Partner_GmbH\PDM 2023"



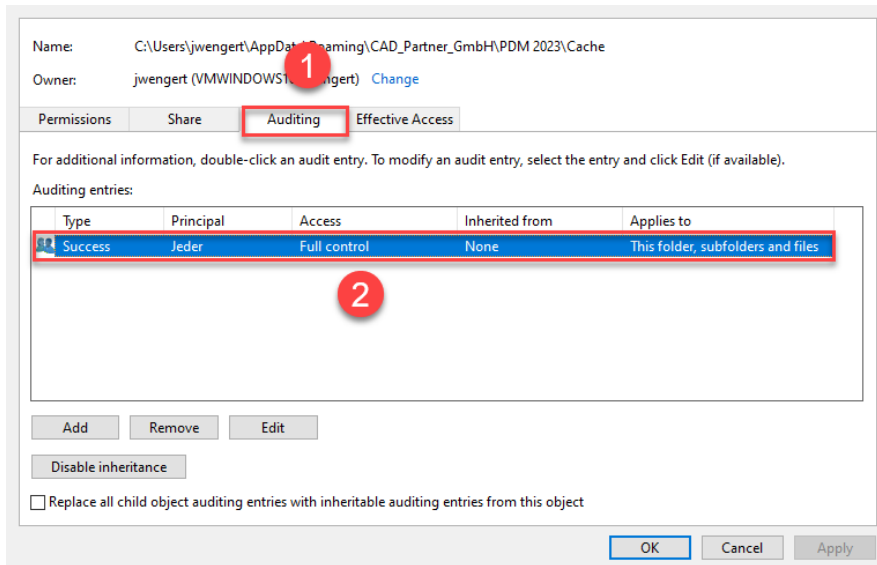
Right-click on the "Cache" folder (2) and select the "Properties" (3).



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

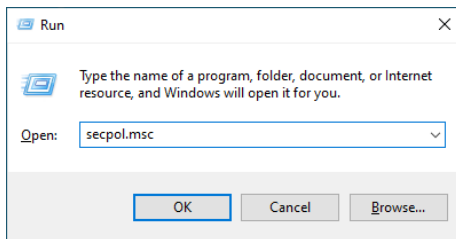


In the "Advanced security settings" of the cache directory, select the "Auditing" tab (1) and then click Continue (2).



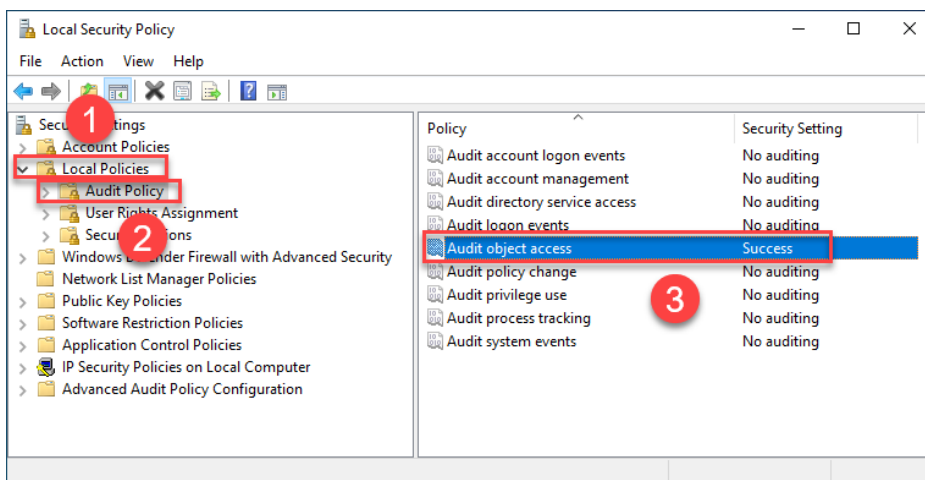
Go to the "Auditing" tab (1). To be able to monitor successful access to the cache folder and all its subfolders and files, "Full control" (2) over this folder and all its subfolders and files **MUST** be configured for everyone without any restrictions. If this is the case, then everything is fine here.

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

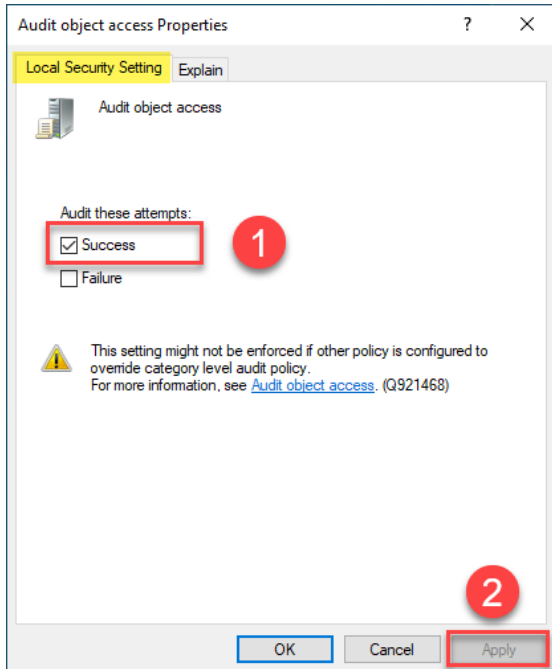


Then enter the command "secpol.msc". The Local Security Policy will be started.

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

Disabling cache monitoring

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

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

Installation

Plugins in general

Some words about custom plugins, specially written for you.

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

After Installation

General

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

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

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

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

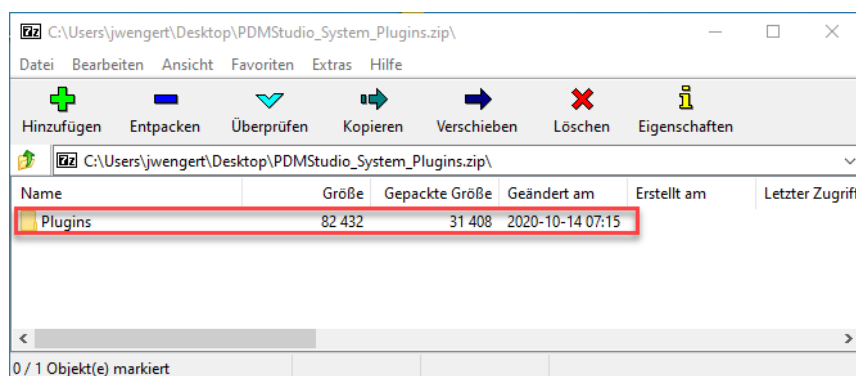
For more information on installing the Free- and Freeconverter plug-ins, refer to the Installation Plug-ins chapter in the "PDMStudio_Installation_2023_EN.pdf" document.

Add - Add-On Tools

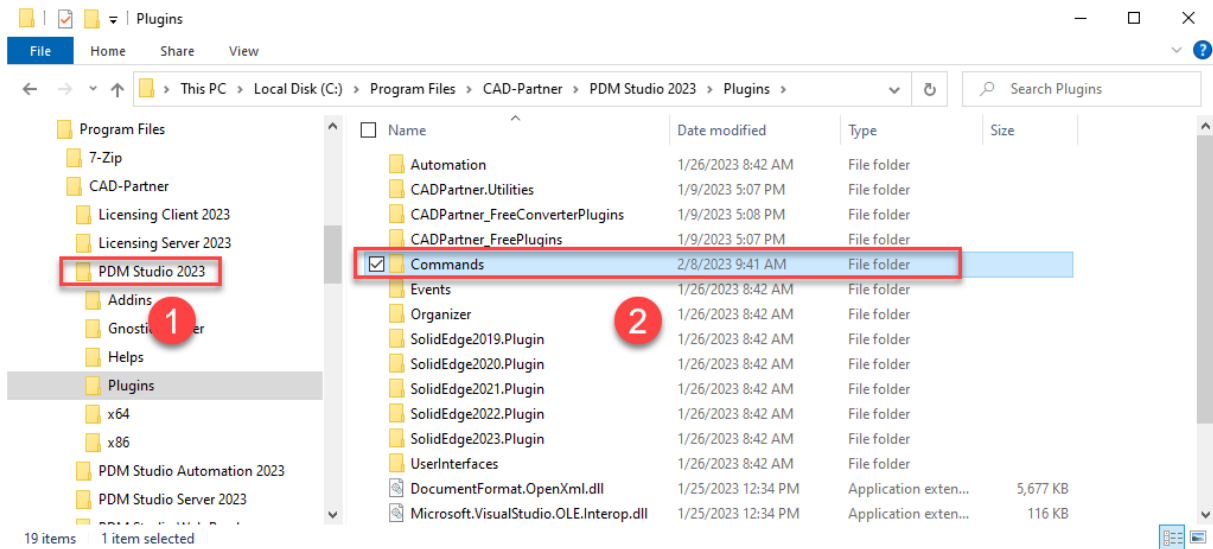
The "Unmanaged Export" function is not included in the installation package of the standard software and must be installed separately after installing the 2023 version.

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).

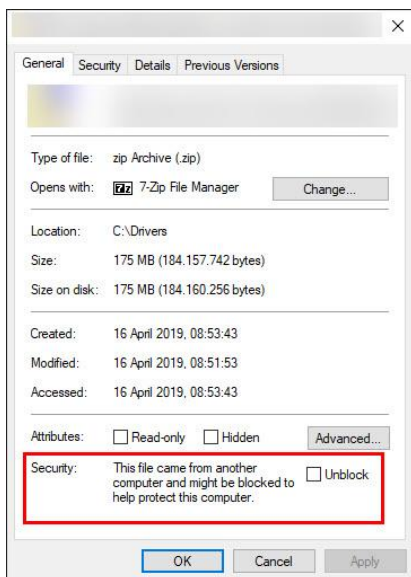
Note: The contents of the folder will overwrite the previous files when updating within PDM Studio V2023.

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.

Startup Problem Plugin Error - Free and FreeConverter Plugins Blocked

IMPORTANT: MICROSOFT IS TIGHTENING THE SECURITY GUIDELINES FOR WINDOWS. IF THE FREEPLUGINS AND FREEAUTOMATION PLUGINS ARE COPIED FROM ANOTHER COMPUTER (NETWORK) OR FROM ANOTHER COMPUTER WITH ANOTHER USER (E.G. ADMINISTRATOR) - IT MAY HAPPEN THAT PDM STUDIO DOES NOT RECOGNIZE THE PLUGINS (ERROR MESSAGES APPEAR THAT THE PLUGINS CANNOT BE LOADED/FOUND (WHEN STARTING PDM STUDIO) - BECAUSE THEY ARE BLOCKED BY THE SYSTEM FOR SECURITY REASONS AFTER COPYING. THIS IS AN AUTOMATIC PROTECTION IN WINDOWS AGAINST FILES THAT COME FROM OTHER COMPUTERS AND CAN POTENTIALLY CAUSE DAMAGE. YOU CAN USUALLY SEE THIS BY LOOKING AT THE PROPERTIES OF ONE OF THESE DLLS IN THE RESPECTIVE PLUGIN DIRECTORY AND SEEING THE ENTRY "THE FILE CAME FROM ANOTHER COMPUTER AND MIGHT BE BLOCKED TO HELP PROTECT THIS COMPUTER".

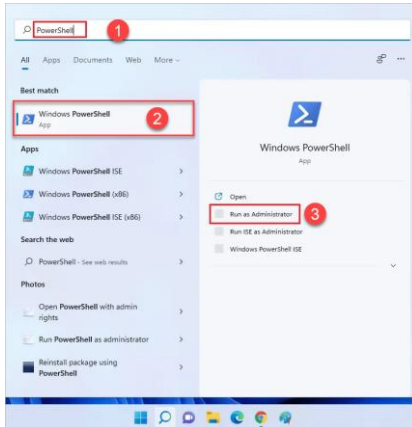


TO SOLVE THE PROBLEM, IT IS NECESSARY TO UNLOCK THE FILES, FILE BY FILE, I.E. ALLOW ACCESS. THE USER MUST ALSO HAVE THE NECESSARY RIGHTS IN THE PLUGIN DIRECTORIES. TO AVOID THIS PROBLEM, IT IS USUALLY SUFFICIENT TO FIRST COPY THE PLUGINS FROM THE NETWORK TO THE LOCAL COMPUTER (E.G. THE DESKTOP) UNDER THE COMPUTER USER'S LOGIN, OPEN THE ZIP FILE, AND THEN COPY THE FILES FROM THERE TO THE APPROPRIATE PLUGIN DIRECTORY.

If the files are still locked, you can also "Unlock" the DLLs using the Windows "Powershell".

How to unlock files in a folder and in all of its subfolders in PowerShell

1. Type "Powershell" in the **command bar (1)**. Open Windows **PowerShell (2)** or **elevated Windows PowerShell (Run as Administrator) (3)**, depending on whether your user account has access to the folder that contains the blocked file(s).



2. Type the desired command in PowerShell and press Enter.
 - a. **No Confirmation prompt:** `get-childitem "Full path of the folder" -recurse | unblock-file`
 - b. **With Confirmation Prompt:** `get-childitem "Full path of the folder" -recurse | unblock-file -confirm`

Example:

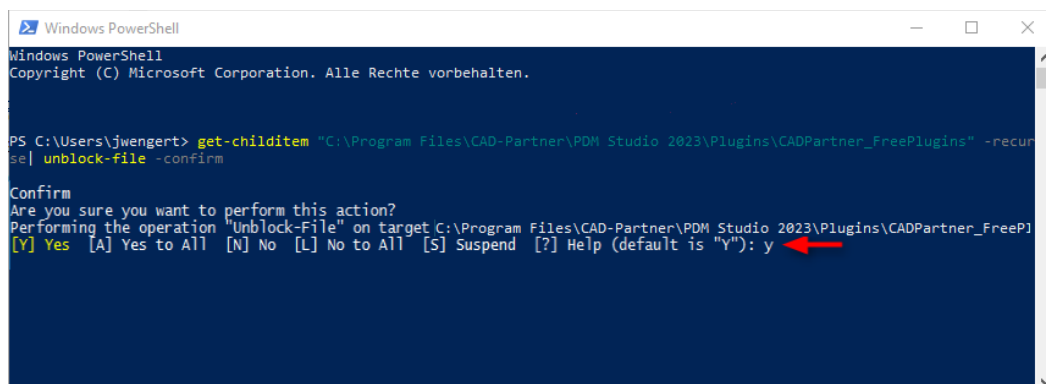
Replace the full path of the folder in the above command with the actual full path of the folder that contains the locked file(s) that you want to unlock.

No Security prompt

```
get-childitem "C:\Program Files\CAD-Partner\PDM Studio 2023\Plugins\CADPartner_FreePlugins" -recurse | unblock-file
```

OR with Confirmation Prompt

```
get-childitem "C:\Program Files\CAD-Partner\PDM Studio 2023\Plugins\CADPartner_FreePlugins" -recurse | unblock-file -confirm
```



Important: There can be NO spaces BEFORE or AFTER the path. The path must ALWAYS be enclosed with quotation marks.

Client Tools

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

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

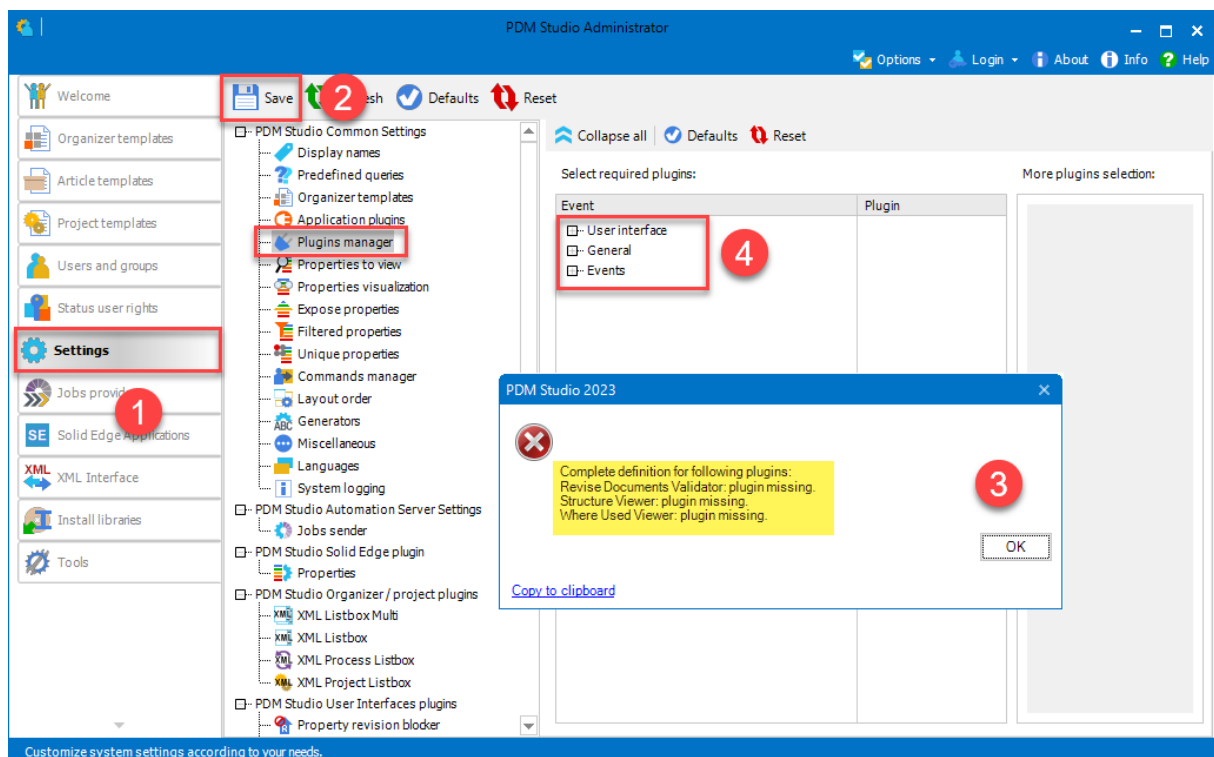
Note: The "SmapX.Client.Tools.dll" contains functions specific to your company's PDM Administrator. Therefore, it must be copied ONLY once to the PDM Administrator's computer. If you need to use these special functions - our support will inform you.

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

Setup Client Administrator

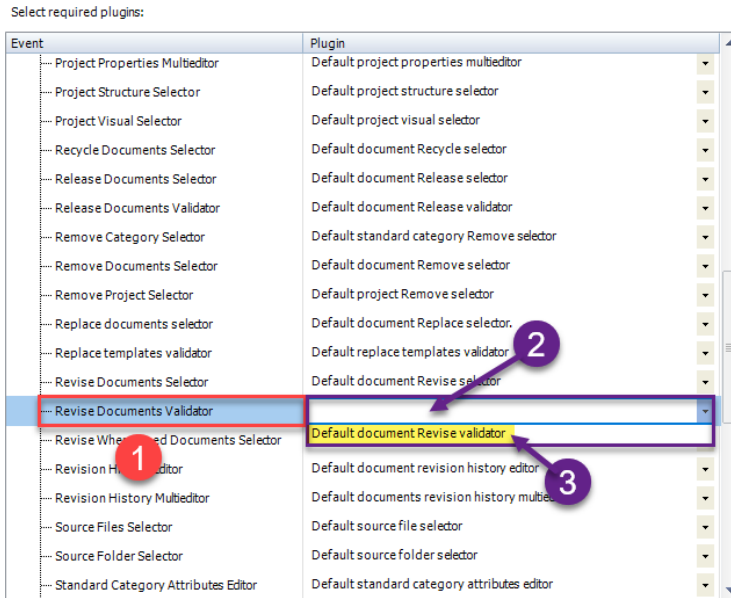
Each installation may also bring new settings to the Client Admin. You will need to manually configure these settings.

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



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.

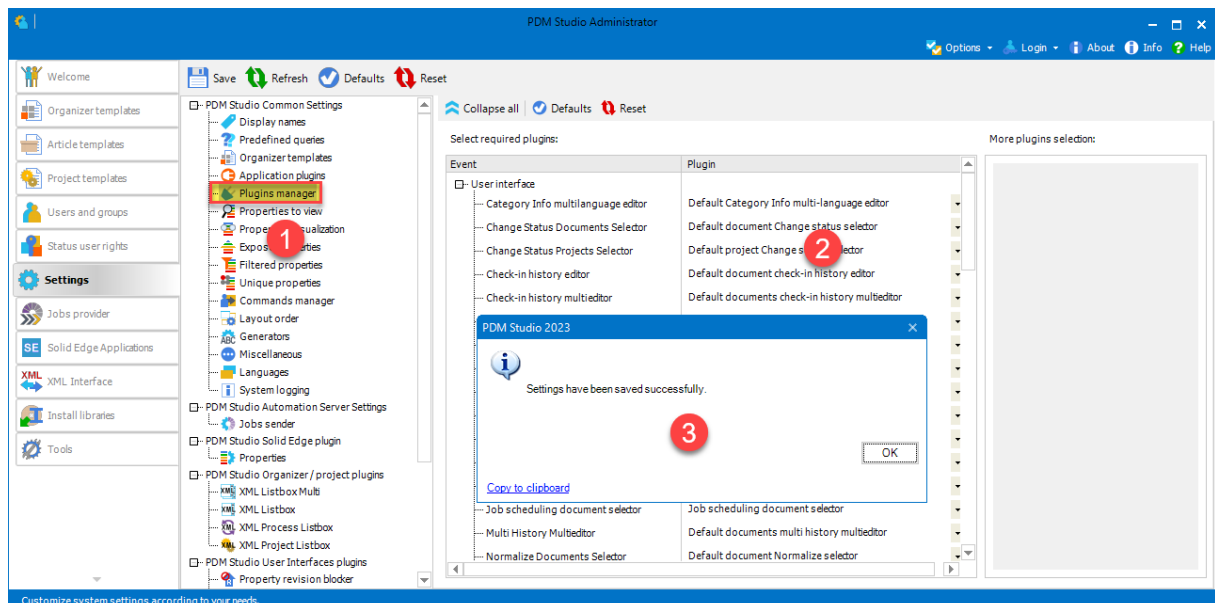
Expand the Event where the Plugin is located, in our example "User interface" and scroll down until you see the mentioned Plugins (image above (3)) "Release Documents Validator" (image below (1)).



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.

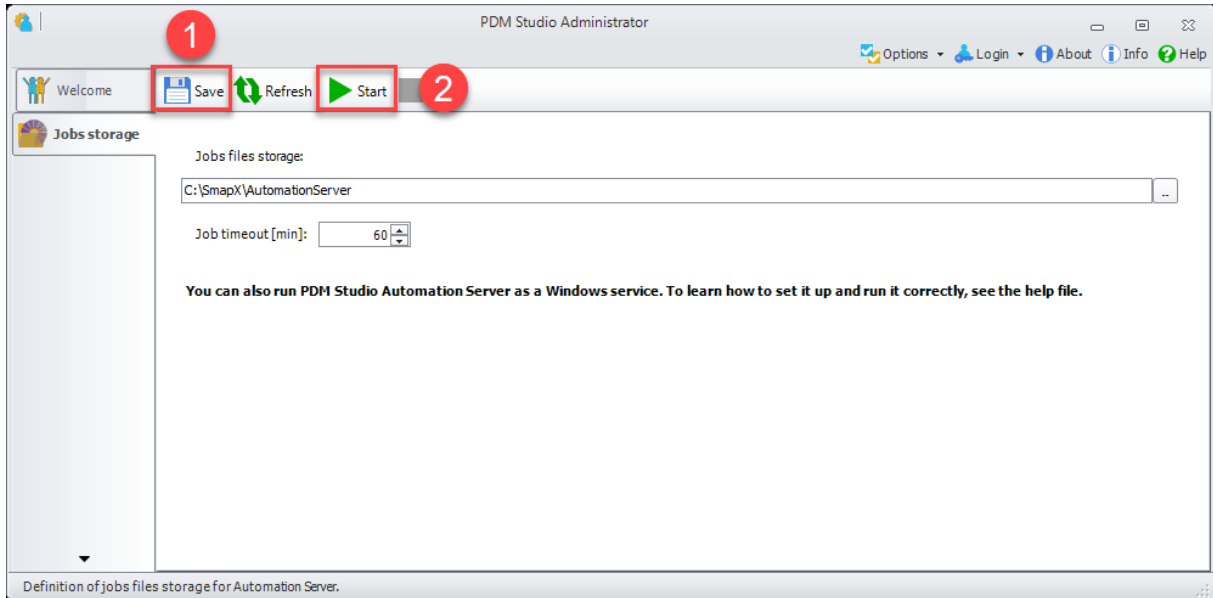
Important: You cannot "Save" the settings until all the necessary settings are set correctly.

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



Setup Automation Administrator

If you are using the Automation module, you must run the **Automation Administrator** after installing the MP, **Save the settings (1)**, and **Start it once from the Administrator (2)**.



This rewrites the settings.



Other enhancements/improvements/changes/fixes/bugs

Enhancements

Module	Description
BOM Connector	Launched a workflow for synchronization document metadata including occurrence data to ERP system through BOM Studio. It's available via events and command plugins.
BOM Connector	Launched a workflow for firing a new article ID request with appropriate settings to ERP system via BOM Studio. It's realized via new ERP Organizer plugin.
BOM Connector	Introduced a new application named PDM Studio Translator including a new setup. This application provides communication between PDM Studio and BOM Studio.
NX integration	Added support of NX 2312 and 2406.
PDM Studio API	Introducing a new API method that makes queries for user documents available.
PDM Studio API	Introducing a new API method for getting occurrence data.
User interface plugins	Introduced a new Organizer hybrid history plugin (revision + status history) uses for synchronization master and non-master documents Organizer values.

Improvements:

Module	Description
Inventor integration	Enlarged the list of supporter Inventor application properties.
Migration	Improve the memory management during a migration of huge number of documents (hundreds of thousands).
PDM Studio	Improved performance of displaying data grid content mainly during expanding large structures.
PDM Studio	Optimized working with large project structures. Improved loading time from the PDM Studio Server.
PDM Studio	Appeared the "Open non-master without origin links" warning dialog only when necessary. Redundant displaying of this message was removed.
PDM Studio Server	Improved handling and logging situations when a method for generating a new document file name fails.
PDM Studio Server	Added reconnection to MS SQL server when connection attempt fails. The connection is retried 3 times with 50 ms interval.

Changes:

Module	Description
Automation plugin	Changed Target attribute for exporting Inventor files to 3D PDF format via Automation plugin.



PDM Studio	The PDM Studio 'Auto close' option works only with warnings and errors occurred during final operation only. Warnings and errors fired before the Finish operation does not block auto closing.
PDM Studio	Changed validation for out-of-date links in Release document wizard. Links are validated and reported for parent assembly now. Not for each separate link where Ignore Why property cannot be filled because they are typically read-only.
PDM Studio	Changed validation for out-of-date links in Release document wizard. Links are validated and reported for parent assembly now. Not for each separate link where Ignore Why property cannot be filled because they are typically read-only.
PDM Studio Server	Migrated PDM Studio Server to .NET 8.0. Changed communication between Server Administrator and PDM Studio Server. Added next logging files.

Repaired Bugs:

Module	Description
Automation Designer	Fixed starting of the Automation Designer in silent mode.
Automation plugin	Fixed handling of the failed imports in Automation import plugin. The reason can be e.g. that document has not been imported because uniqueness validation.
Client Administrator	Removed the validation rule "Different revisions of the same document in the top document" from the copy list of Validation Manager in client settings.
General	Fixed transferring of file attributes during migration of local file cache from old PDM Studio version to new one (PDM Studio 2023).
General	Fixed the expanded width of a combo box placed in a toolbar after changing its size.
Installation	Fixed setting of access rights for 'PipelineSegments.store' file during Automation setup installation. It caused issues on a 'clean' machine in the first start of Automation Designer.
NX integration	Fixed exporting PDF files via Automation Server. PDF files were created but the whole process was stopped and failed.
NX integration	Fixed opening drawings via Open Draft(s) command in PDM Studio NX integration ribbon bar.
PDM Studio	Fixed cancelation of resolving the out-of-date documents in Release wizard. When these resolving crashes, then the redundant message appears.
PDM Studio	Changed the severity of the message when mandatory plugins are not set correctly. New severity is 'error' because it blocks starting application.
PDM Studio	Fixed propagation of the state from scheduling wizard to document list. The document list is not already grayed.

PDM Studio	Fixed handling of non-structural links in the unmanaged export. Fixed exporting structures contain non-structural links.
PDM Studio	Added missing note in the PDM Studio log file about starting Unmanaged export wizard.
PDM Studio	Fixed handling of family of parts documents in the Unmanaged export.
PDM Studio	Fixed the selection of all validation issues together in Update document wizard.
PDM Studio	Fixed starting of all available jobs in case of customer Automation server usage.
PDM Studio	Fixed the finish operation of the Release document wizard where edited values were not be correctly written to released document.
PDM Studio	Fixed the auto ignoring / resolving issues in the Release document wizard validation step mainly for out-of-date links issues.
PDM Studio	Fixed the auto resolving 'preliminary template' issue in the Release document wizard validation step. Replace template wizard is correctly started now.
PDM Studio	Fixed validation of the Update document wizard when obsolete non-master documents should not invalidate the entire structure.
PDM Studio	Fixed disabling all children in entire document structure for out-of-date documents in the 1st selection step of Update document wizard.
PDM Studio	Fixed displaying the context menu for checked-out documents managed by XML Interface (NX, Inventor ...) in Pending Changes panel.
PDM Studio	Fixed detecting of document duplicities in Revise / Update wizard when one document is disabled because cycle and second document is out of cycle.
PDM Studio Server	Fixed restoring an existing data storage to a new database in specific situation when default characteristics are defined.
PDM Studio Server	Canceled the evaluation of empty property values for global uniqueness check.
Server Administrator	Fixed displaying a wrong warning about not existent files linked in data storage alias files during Data storage integrity check command.
Solid Edge integration	Fixed saving geometric version info used for detection of out-of-date documents in document structures.

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