



PDM Studio

What's new 2023 | EN | MP 07

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Table of contents

Table of contents 2
Introduction 4
Licensing 2023 4
Supported Operating Systems: 4
Update Licensing Version 2023..... 4
Installation 4
PDM Studio Server Administrator 5
Extension of the data storage check..... 5
PDM Studio Client Administrator 6
Validation rules 6
Added plausibility check as a new option in the Import document type by more paths preference 7
Configuring the panel hierarchy for the static structure window 8
How dependency structures are established..... 8
PDM Studio 12
Added support for selecting revisions in the Structure and Where Used Panels for non-master documents. 12
Icons introduced in the Where Used panel to indicate whether a document is assigned to a project/article or both 12
Example Project assignment: 12
Example Article assignment: 13
Example Article AND Project assignment:..... 13
Example of different assignments to different revisions 14
New options in the first step "Document Selection" of the revision and update wizards 15
Revision and Single revision 15
Update and Update where used 17
Validation rules in the wizards in the Document validation step 17
Example of releasing documents without predefining the default settings in the Client Administrator..... 18
Option 1 – Selective selection 18
Option 2 – Resolve all issues 19
Example of releasing documents with presetting's in the Client Administrator 21

Enhancement of the Copy Wizard	22
Merged options:	22
New Option:.....	23
Enhanced option in the Versioning Wizard for non-master documents.....	23
Panel hierarchy Static structure.....	24
Other (Technotes).....	25
Command Plugin "SmappX.Command.Plugins.dll"	25
General	26
Message Cache monitoring could not be initialized	26
Disabling cache monitoring.....	31
Installation	32
Plugins in general.....	32
After Installation	32
General	32
Add - Add-On Tools.....	32
Client Tools	34
Setup Client Administrator	34
Other enhancements/improvements/changes/fixes	36
Enhancements	36
Improvements:	36
Changes:	36
Repaired Bugs:	37
Imprint	39

Introduction

PDM Studio 2023 MP07 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 "ReadmePDM2023MP07.txt" in the "Documents\EN" directory of your MP07 installation files. This document lists the ticket numbers of the solved tickets in MP07.

For more information on **how to install the V2023 MP07**, 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 MP07.

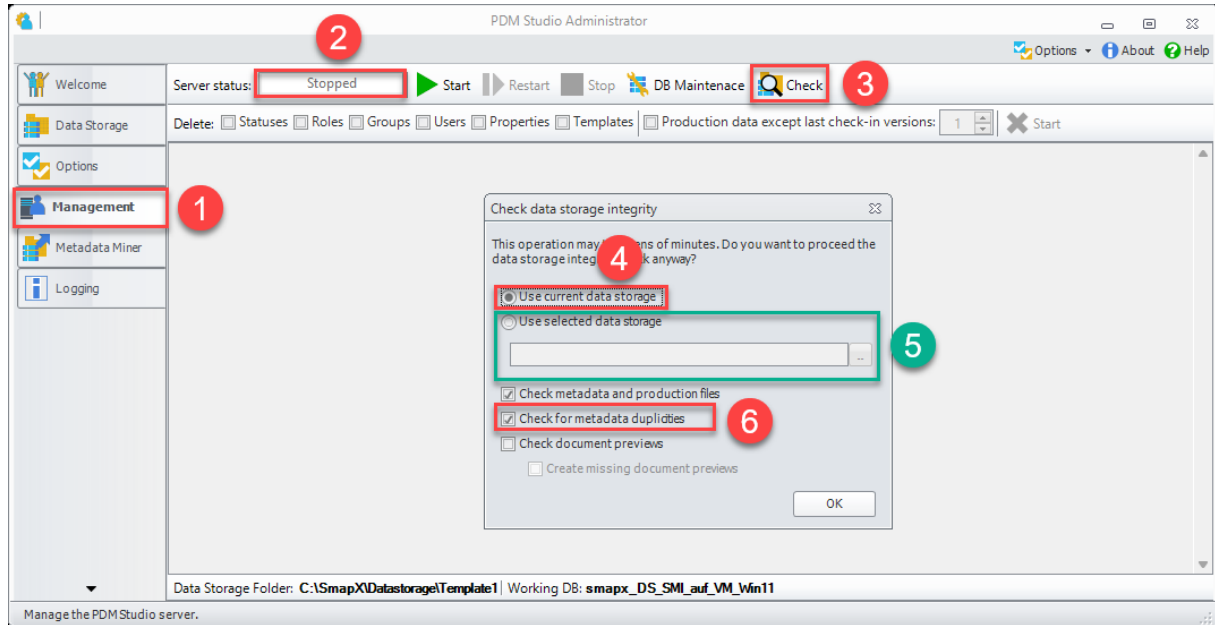
Installation

Important: We strongly recommend that you check in all documents and clear the local cache on all clients before installing PDM Studio V2023 MP07.

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

Extension of the data storage check



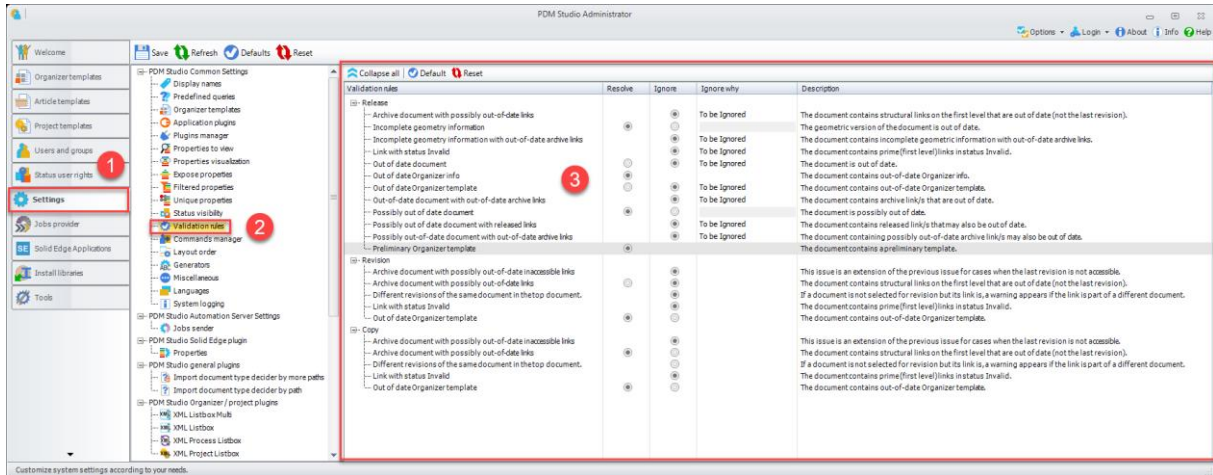
The **data storage integrity check (3)** has been extended. It is now possible to check **other data Storages (5)** in addition to the **current data Storage (4)**. It is now also possible to check for **metadata duplicates (6)**.

Important: To check the current data storage (4), the PDM Studio Server (2) MUST be stopped. The current data storage can ONLY be checked if the PDM Studio Server is stopped.

A data store that is offline (4) can be checked during runtime. In this case, it is not necessary to stop the PDM Studio Server (2).

PDM Studio Client Administrator

Validation rules



MP07 introduced a new preference called **Validation rules (2)** in **settings (1)**. These allow **default settings (3)** to be defined in the Client Administrator for automatically resolving or ignoring any problems that may occur during document validation in the PDM Studio release, revision and copy wizards. In PDM Studio, these rules are then automatically applied to the wizards.

The columns available are:

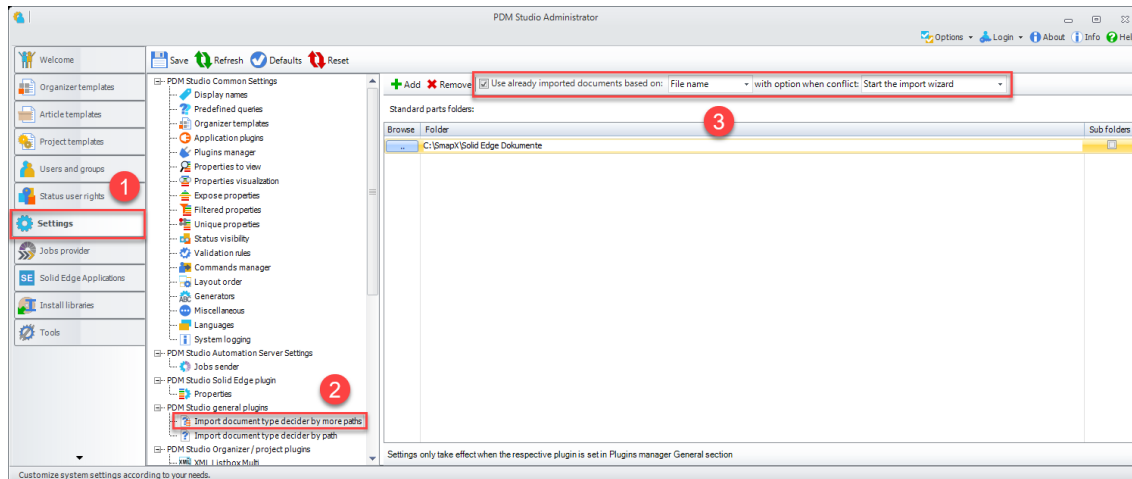
- **Validation rules** - Lists the possible issues depending on the individual processes that can occur with each wizard.
- **Resolve** - Allows you to set resolvable issues to be automatically resolved when the wizard reaches the document validation step.
- **Ignore** - Allows you to set ignorable issues to be automatically ignored.
- **Ignore why** - When ignoring issues in the release Wizard, you must enter a reason in this column. The reason is then stored as the value of the "Ignored why" managed property.
- **Description** - Displays a detailed explanation of each issue.

Important: For documents in the structure where multiple problems are found at the same time, the default settings of PDM Studio's automation are currently not applicable. These problems MUST be solved one by one in the respective wizards in the "Document validation" step.

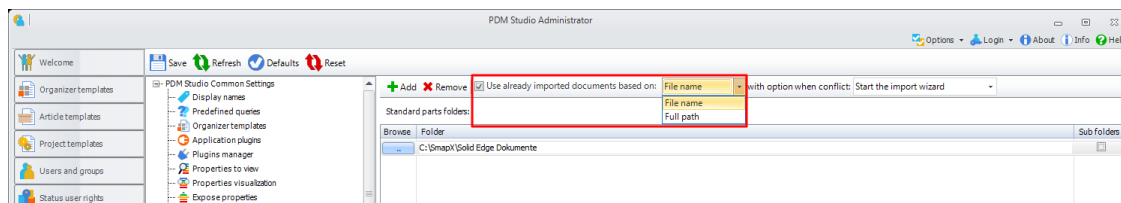
For more information, refer to the PDM Studio chapter [Validation rules in the wizards in the Document validation step](#)

Added plausibility check as a new option in the Import document type by more paths preference

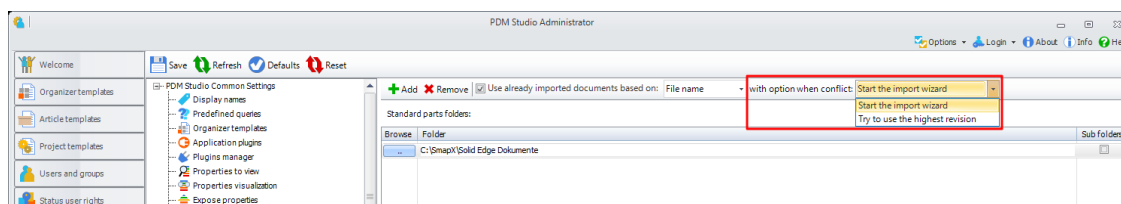
With MP07, the **Clever Import functionality (3)** has been integrated into the PDM Studio general plugins setting "Import document type decider by more path" (2).



This setting is like the "Import document type decider by path" setting but allows you to specify multiple paths for the standard parts folders.



New in MP07 is the option "Use already imported documents based on" (3) to automatically detect (possibly) existing user documents/standard parts, and then select the filename or full path from the drop-down menu to define the criteria for evaluating documents/standard parts as already imported.

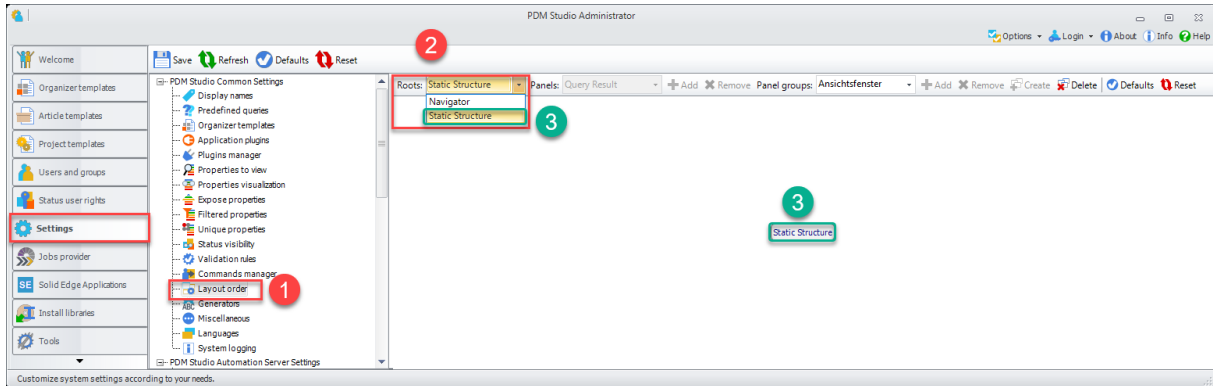


If the User Document/Standard Part is recognized as already imported but matches more than one managed document, two further options in the next drop-down menu determine what happens next:

1. select "Start the Import Wizard" to start the Import Wizard.
2. select "Try to use the highest revision" and the highest revision of the User Document/Standard Part will be used (without starting the Import Wizard).

Note: If (at least) two User Documents/Standard Parts with the same version are detected, the Import Wizard will be started regardless of the option selected.

Configuring the panel hierarchy for the static structure window



In MP07 an additional option has been introduced in **Settings > Layout order (1)** to define a layout for the **Static Structure panel (3) as top level (2)** in addition to the layout starting with the Navigator panel as top level.

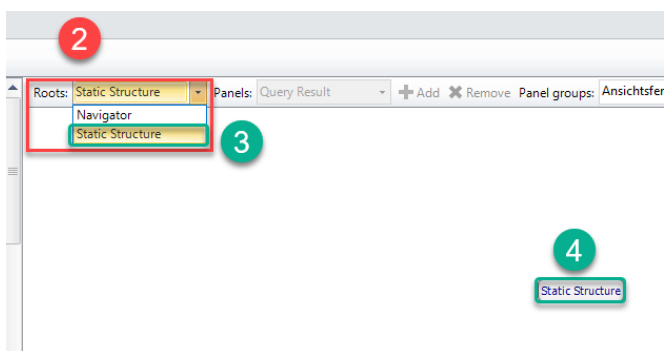
General: The Layout order setting is used to define the dependencies between the Navigator panel and the Static Structure panel (3) and the other windows in PDM Studio.

In this case, dependencies mean that a selection (e.g., a single document, several documents, a category, a project, etc.) spreads from one window to another.

The Navigator and the Static Structure window (as a parent node) are always displayed in the center of the structure. The selection is distributed from the center to the outer windows.

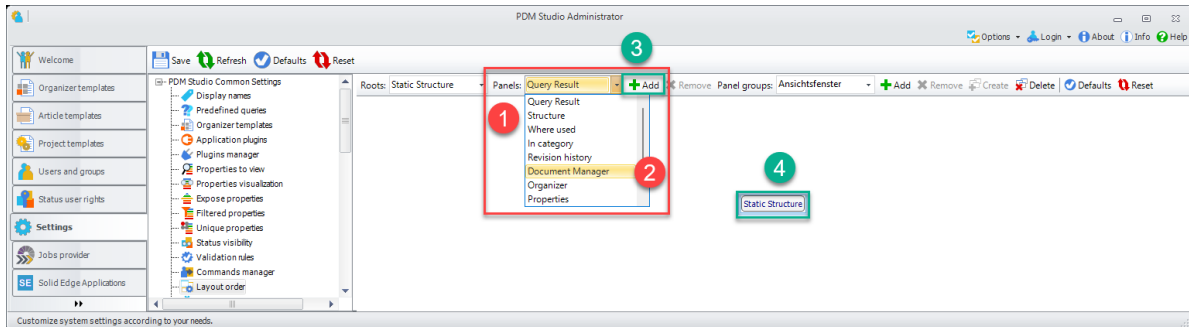
How dependency structures are established

- In the **Roots drop down list (2)**, select the root diagram to be configured, in our case **Static Structure (3)**.

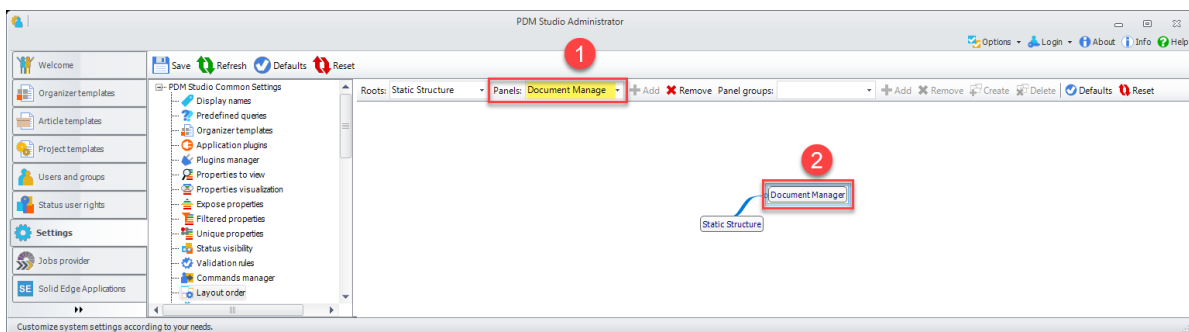


The **Static Structure layout (4)** is now displayed in the main window. It stands alone as no links to other windows or groups of windows have yet been defined. Select the **Static Structure layout (4)** by clicking on it.

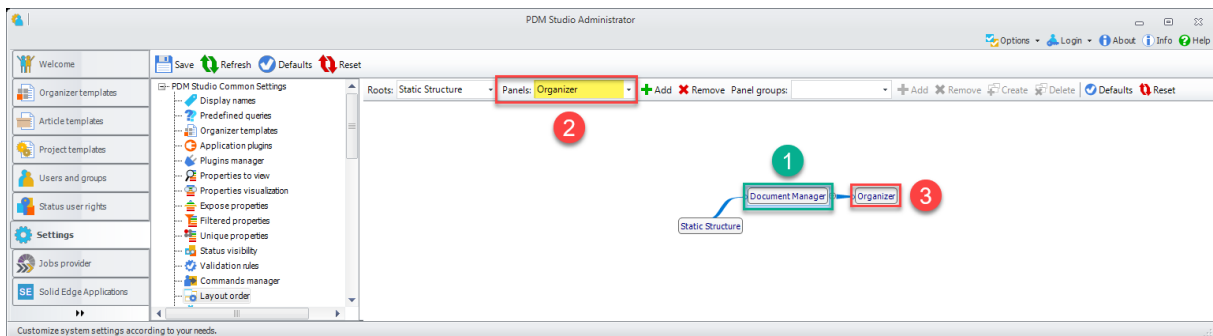
- To place the **panel (2)**, selected in the **panel selection list (1)** - in our example the Document Manager panel - under an active window - in our example the static structure - select **Add + (3)**.



As a result, in our example, the **Document Manager panel (2)** is placed below the Static Structure panel.

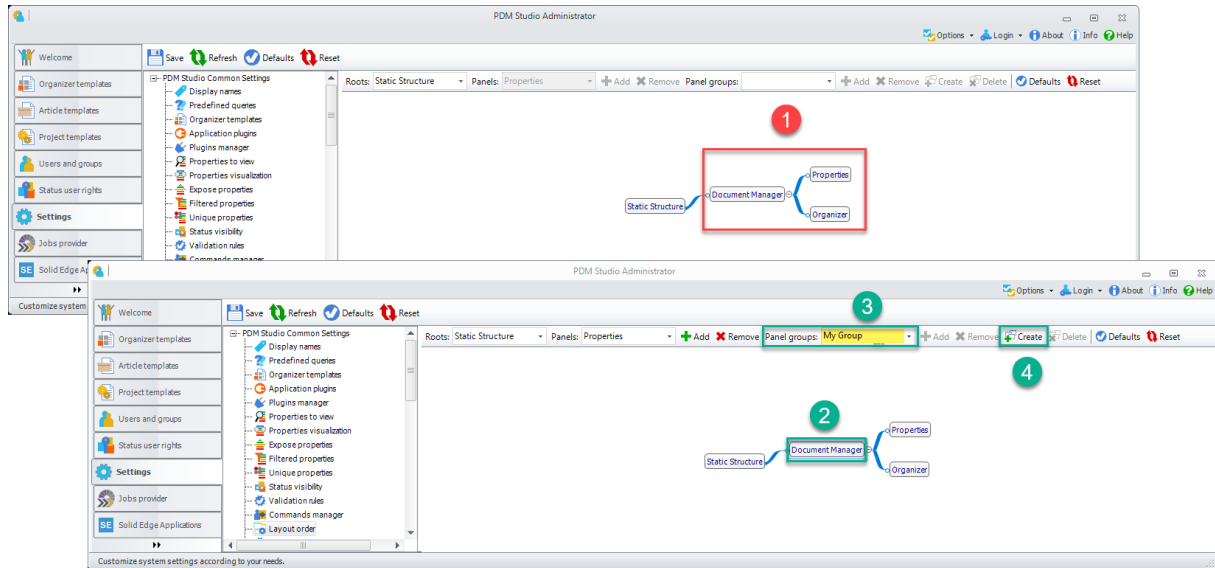


As a result, the documents that are selected in the static structure will be inherited by the Document Manager panel and will be displayed in it.

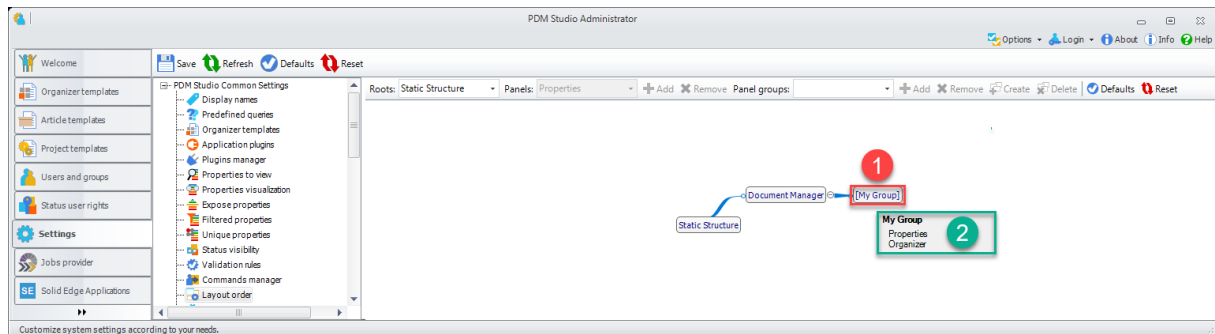


If I now select the **Document Manager panel (1)**, choose the Organizer panel from the drop-down menu and add it to the **structure (2)**, the Organizer panel is placed below the Document Manager panel (3) and then displays in PDM Studio the information that was transferred from the Document Manager panel for the document selected there.

- To create a group of panels, first place the desired panels (in our example, the Organizer and Properties panels) below **another panel** (in our example, the Document Manager panel) **(1)** in the same way as in the previous topic.



Then select the panel, in our example the **Document Manager** panel (2), from which the panels below it are to be grouped, but which is not itself part of the group, and enter a **group name** (3) in the Panel groups selection field (this field is both a selection list and an input field), and select **Create** + (4).



In our example, a new group "**My Group**" (1) has been created from the Organizer and Properties panels. If you move the mouse over the new "My Group" panel, you will see a **tooltip showing the list of panels** (2) that are in this group.

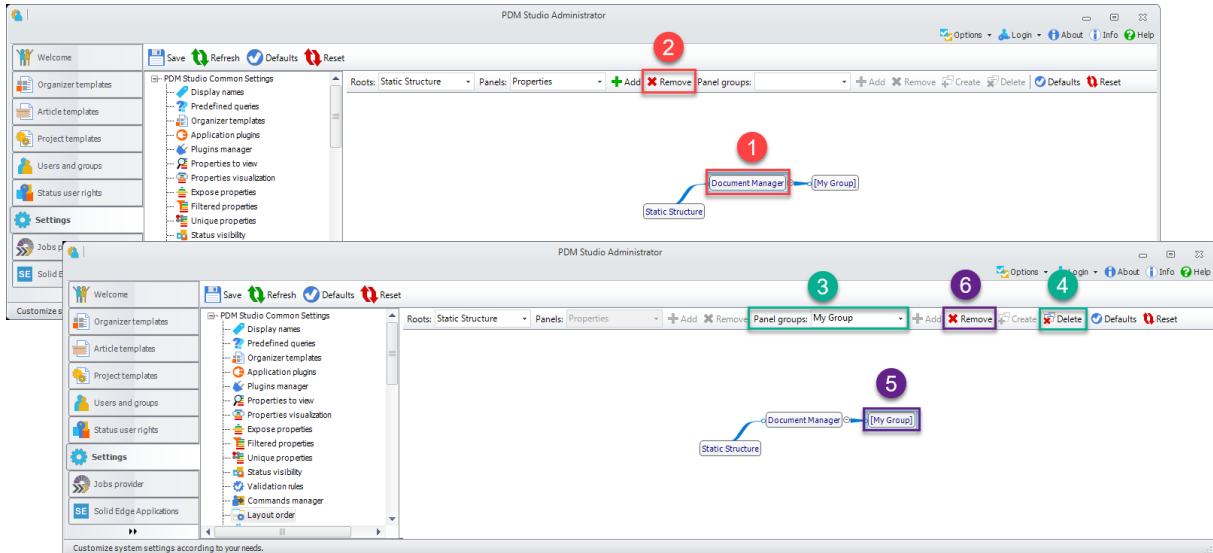
Note: Panel groups can only be placed at the end of the structure, i.e., it is not possible to place a panel or panel group below a group.

Note: The Group Name is only visible in the Client Administrator.

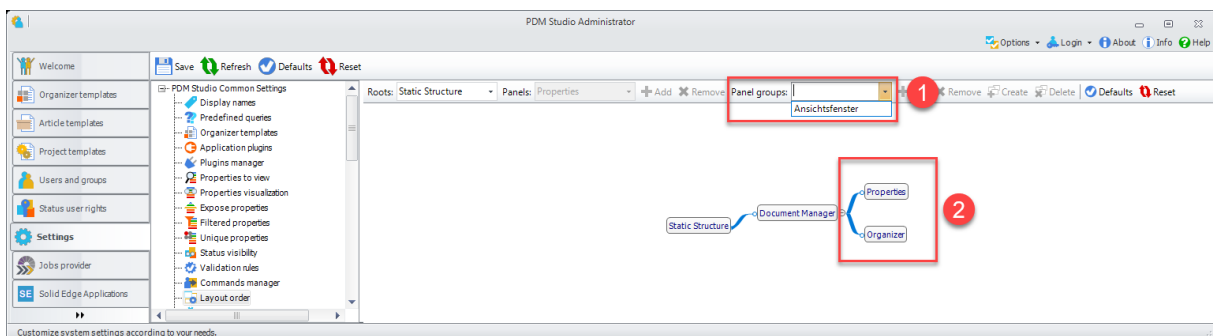
Note: A Panel Group typically contains the Panels that are on the same level within the structure (e.g., the Panels associated with the Predefined Panel Group intended for Display, i.e., the Panels to be placed at the Bottom of the Structure).

- Clicking on the **Remove button** ✖ (2) removes the **active panel** (1) (including all subordinate panels and panel groups) from the structure. A group can also be removed from the structure by

selecting the **group (5)** and clicking the **Remove button ✕ (6)**. This only removes the group from the structure, but it remains as a group for further use.



Note: If a group is selected in the Panel Groups (3), it can be deleted from the system using the Delete button ✕ (4).

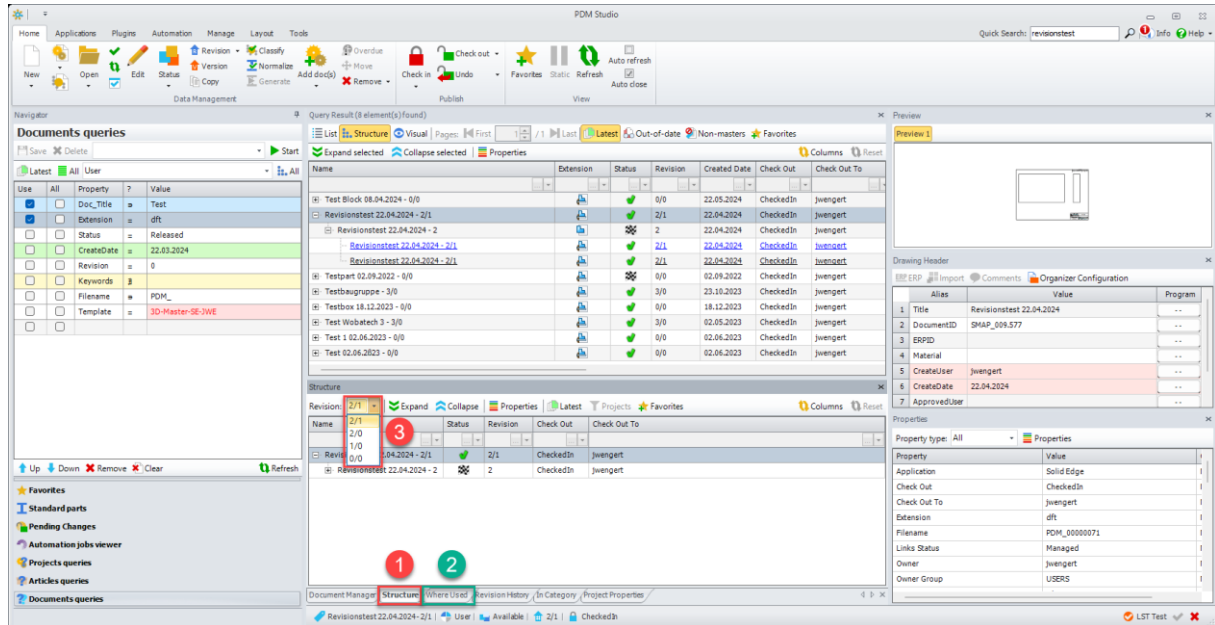


Note: If the group is deleted, it disappears from the panel group (1) and is broken down into its individual panels.

For more information, see [Static Structure Panel Hierarchy](#) in the PDM Studio chapter.

PDM Studio

Added support for selecting revisions in the Structure and Where Used Panels for non-master documents.

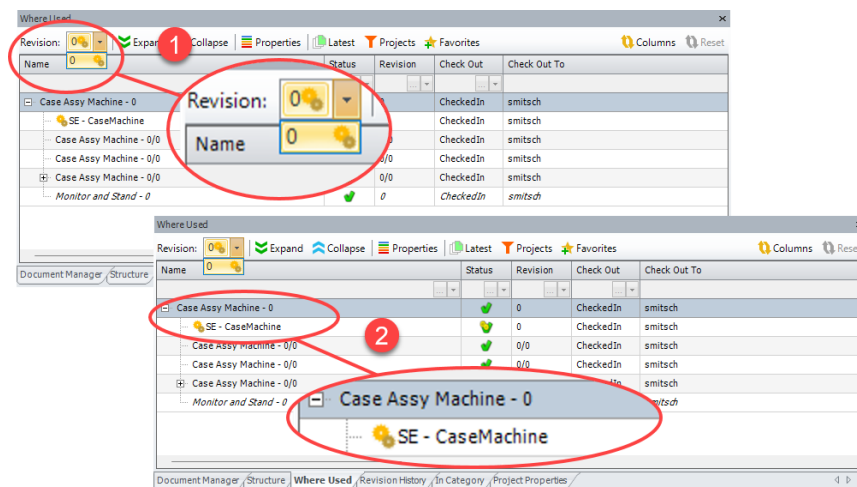


Support for revision selection for non-master documents has been added to the **Structure (2)** and **Where Used (2)** panels. In the **drop-down menu (3)**, the existing revision can now also be selected for non-master documents.

Icons introduced in the Where Used panel to indicate whether a document is assigned to a project/article or both

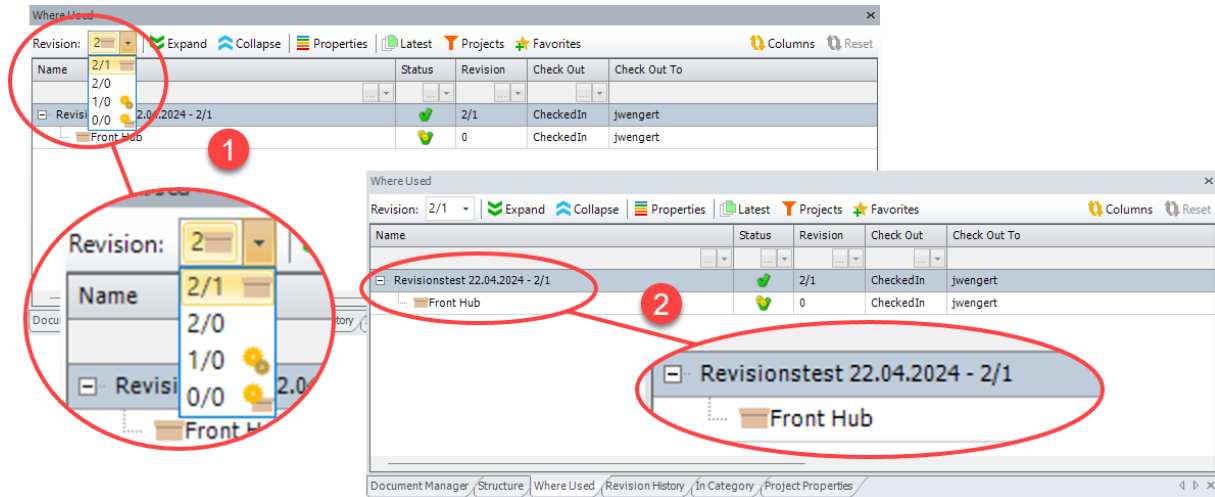
With MP07, icons have been added to the Where Used panel to better identify which documents are assigned to projects, articles, or both.

Example Project assignment:



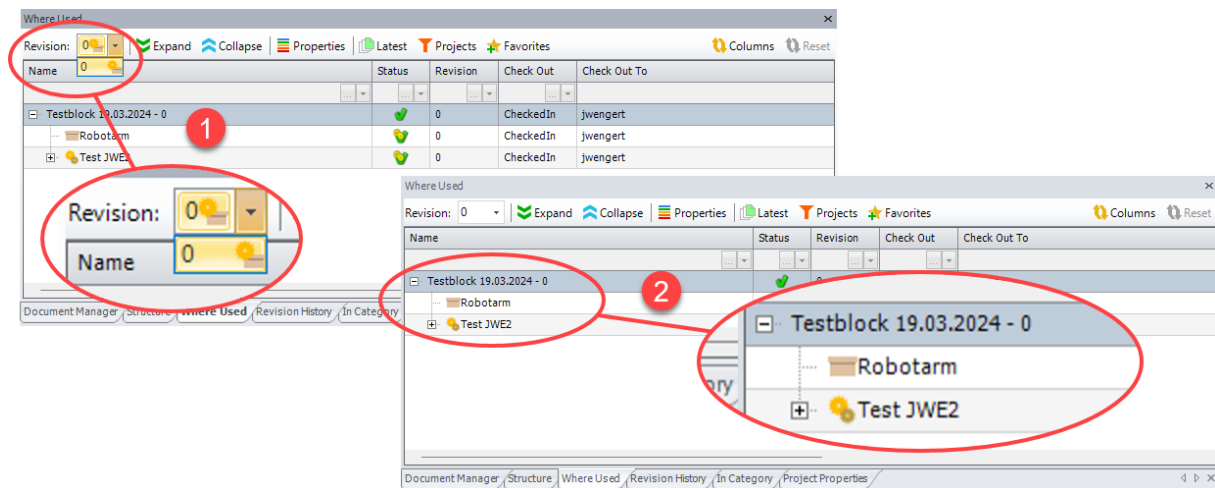
The document revisions embedded in projects are displayed as belonging to a project. The corresponding project is displayed in the **tree view (2)** after expanding the selection box and selecting the revision with the corresponding **Project icon** next to the **revision number (1)**.

Example Article assignment:



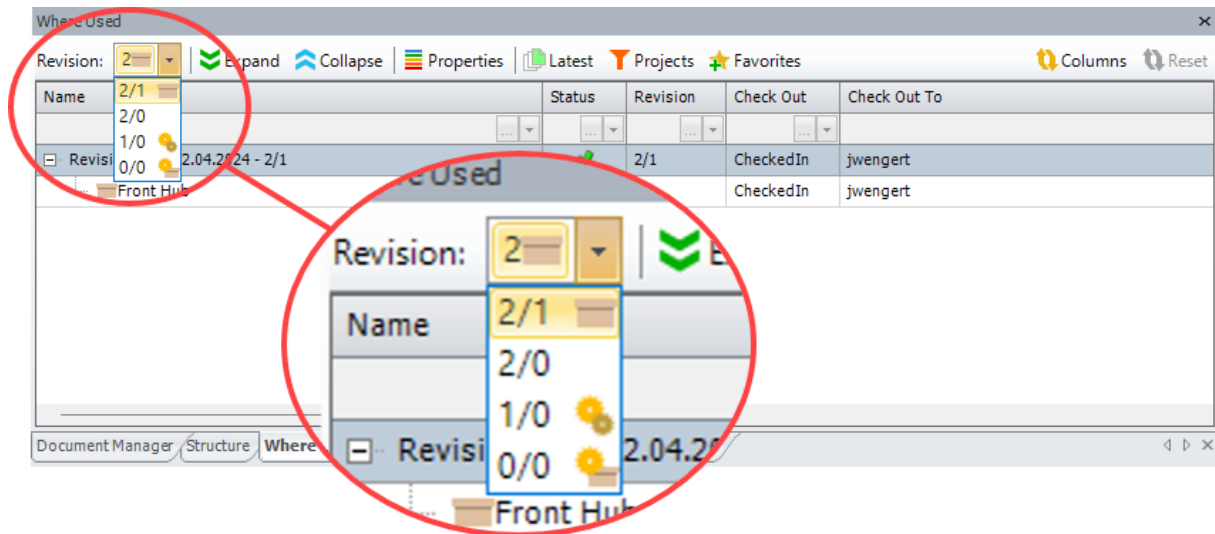
The document revisions embedded in articles are displayed as belonging to an article. The corresponding article is displayed in the **tree view (2)** after expanding the selection box and selecting the revision with the corresponding **Article icon** next to the **revision number (1)**.

Example Article AND Project assignment:

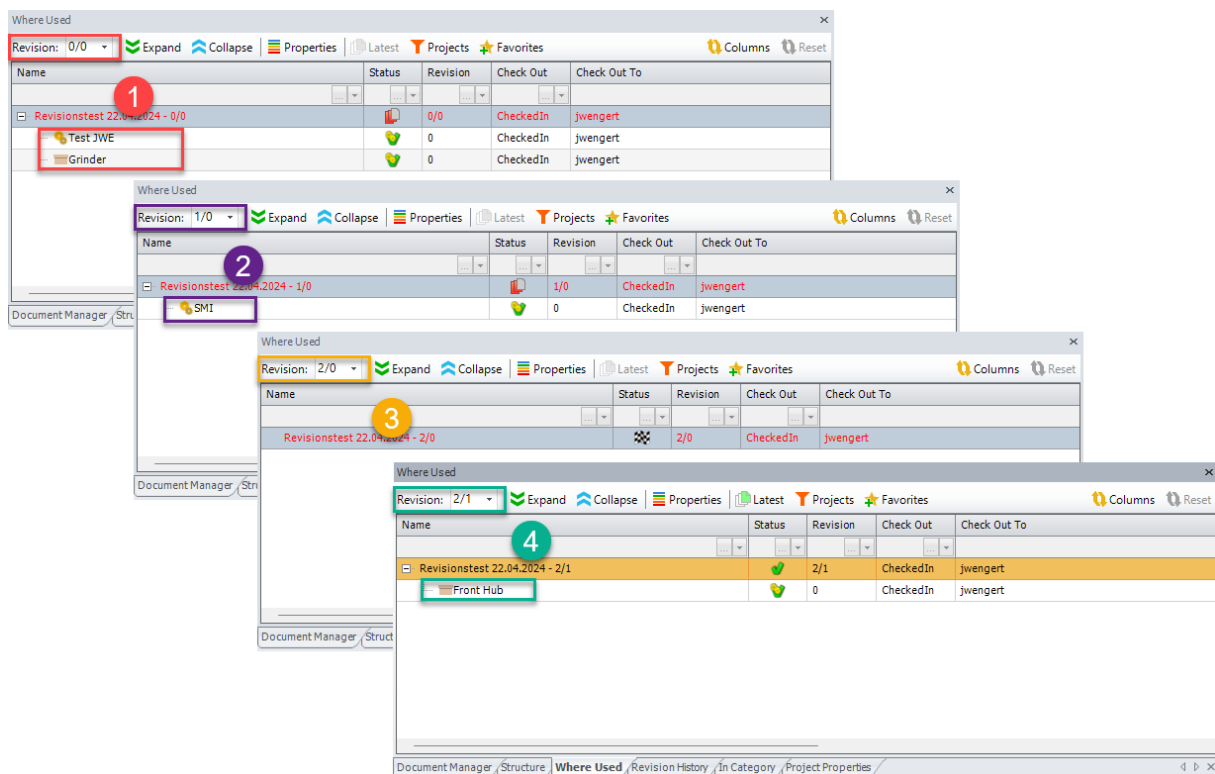


The document revisions embedded in **Projects AND Articles** are displayed as belonging to a project AND an article. The corresponding project AND article are displayed in the **tree view (2)** after expanding the selection box and selecting the revision with the corresponding **Project AND Article icon** next to the **revision number (1)**.

Example of different assignments to different revisions

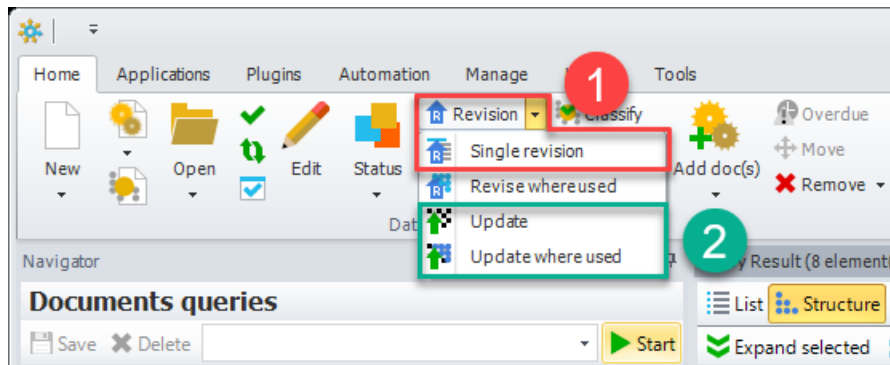


If different revisions are assigned to different projects and/or articles in the drop-down list, the icon behind the revision will indicate the assignment.



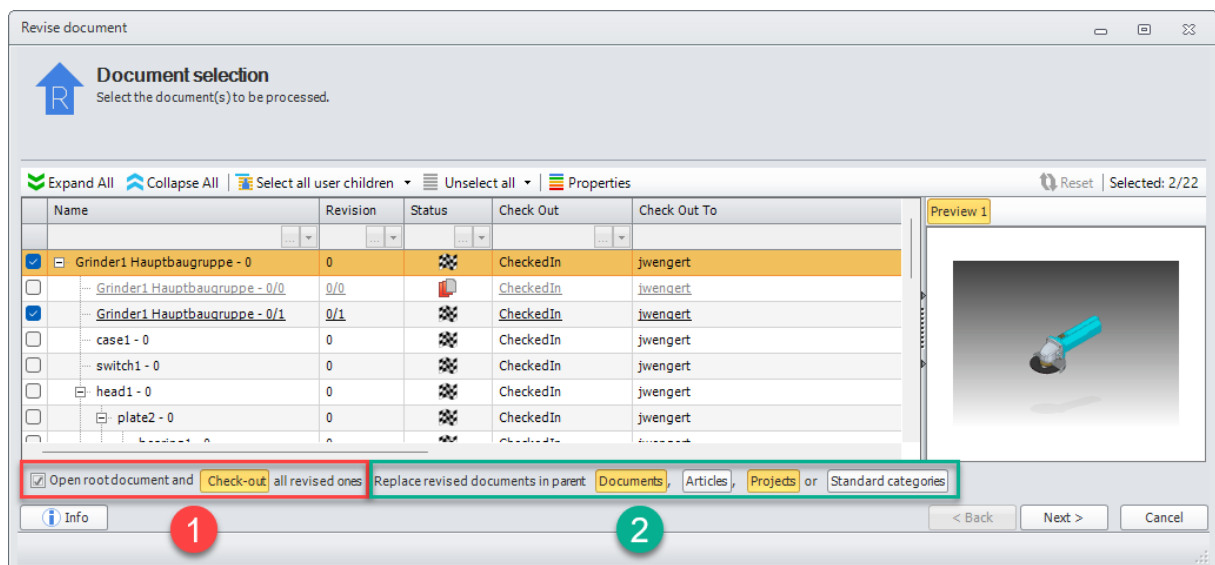
In our example, revision "0/0" is assigned to a **project AND an article (1)**. Revision "1/0" is only assigned to a **project (2)**, while revision "2/1" is only assigned to an **article (4)**. Revision "2/0" has no association and is **not associated with either a project or an article (3)**.

New options in the first step "Document Selection" of the revision and update wizards



New options have been introduced in the first step of the wizards for the "Revision", "Single revision" (1), "Update" and "Update where used" (2) functions.

Revision and Single revision



There are now two new options:

1. Open root document and "Check-out" all revised ones

If the option "Open root document and Check-out all revised ones" (1) is checked, the root document will be opened as soon as the revision process is finished. If this option is enabled, the Check-out button is active and, when pressed, will check-out all revised documents once the revision process is complete.

Note: The Check-out button is a toggle that, when pressed, enables, or disables the Check-out feature. If the button is off, documents will not be checked out.

Note: The Check-out button is off by default.

2. Replace revised documents in parent Documents, Articles, Projects, or Standard categories

The "**Replace revised Documents in parent Documents, Articles, Projects or Standard categories**" **feature (2)** allows you to replace the original revised documents with the newly created revisions in the following situations:

- **Managed parent Documents** - Applies only to documents whose parent documents are in the working status and not selected for revision.

Example:

Let us have the following structures of user documents:

- DocA R0 (parent; Available status)
- Doc1 R0 (child; Released status)
- DocB R0 (parent; Available status)
- Doc1 R0 (child; Released status)

Let us select DocA R0 and start the Revision command. The structure of DocA R0 is displayed in the Document Selection step, Doc1 R0 is selected for revising and the Replace copied documents in managed parents' option is on.

Finish the wizard so that Doc1 R1 is created as a new revision of Doc1 R0.

The result is as follows:

- DocA R0 (parent; Available status)
- Doc1 R1 (child; Available status)
- DocB R0 (parent; Available status)
- Doc1 R0 (child; Released status)

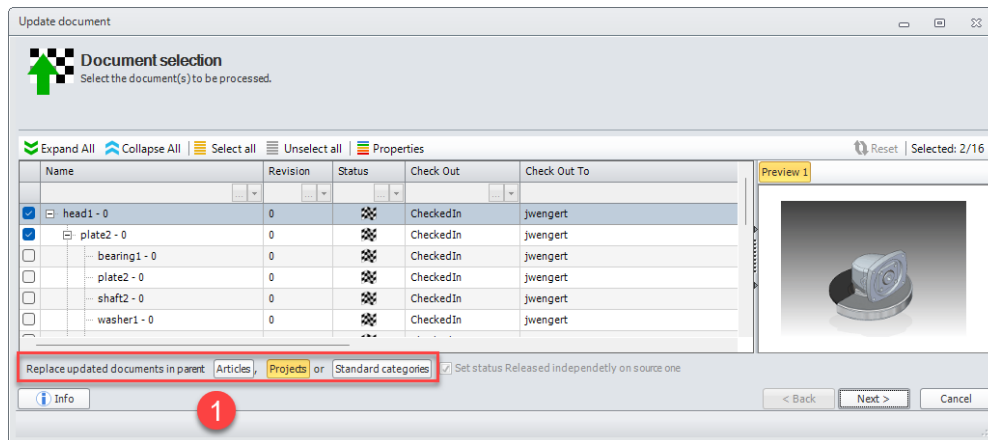
In DocA R0 the link (Doc1 R0) has been replaced with its revision (Doc1 R1). The structure of DocB R0 has been kept untouched since DocB R0 was not part of the revised structure (was not displayed in the Document Selection step of the Revise document wizard).

- **Articles and Projects** - Updates documents embedded in articles or projects with their latest revision.
- **Standard categories** - New document revisions will be classified in the same standard categories as the originals.

Note: The "Documents", "Articles", "Projects" and "Standard categories" buttons are switches which, when pressed, activate, or deactivate the functions.

Note: The buttons "Documents", "Articles", "Projects", "Standard categories" within the option are off by default.

Update and Update where used



In the first step of the wizards for the “Update” and “Update where used” functions, new options “Replace updated documents in the parent Articles, Projects or Standard categories” (1) have been added.

By activating the respective "Articles", "Projects" or "Standard categories" buttons within the option, you can selectively replace the original revisions of the updated documents in the respective groups (Articles, Projects, or Standard Categories) with the newly created revisions:

- **Articles and Projects** - Documents embedded in articles or projects will be replaced with their newly created revision.
- **Standard categories** - New revisions of documents placed in standard categories will be placed in the same categories as well.

Note: The "Articles", "Projects" and "Standard categories" buttons are switches which, when pressed, activate, or deactivate the functions.

Note: The “Articles, Projects, Standard categories” buttons within the option are switched off by default.

Validation rules in the wizards in the Document validation step

With MP07 - as described in the [Validation rules](#) section of the Client Administrator chapter - the ability to define default settings for problems that occur has been added.

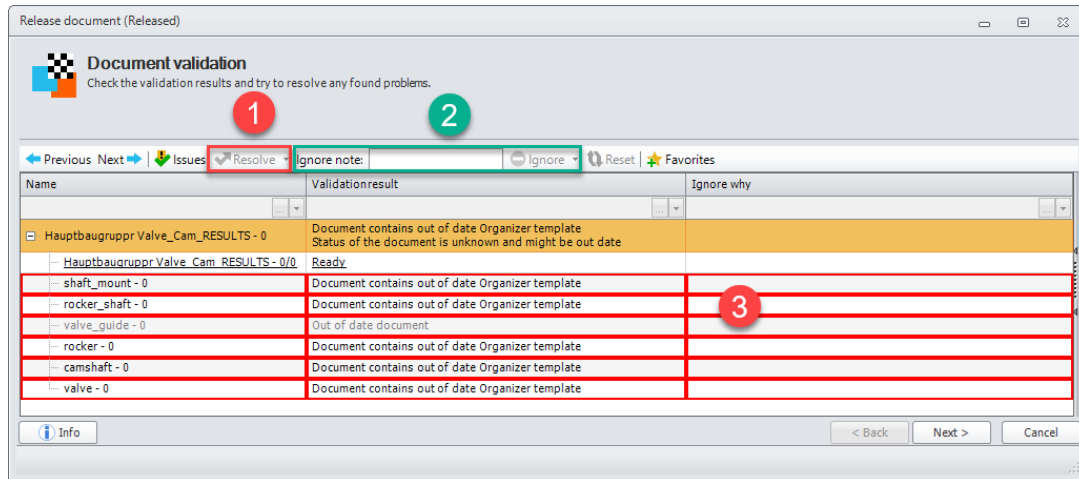
This allows problems in the Document validation step of the Copy, Release, and Revise document wizards to be automatically resolved or ignored without further user intervention.

Important: Some conflicts cannot be resolved, only ignored. If there are only conflicts that can only be ignored, the "Resolve" button will remain inactive even after the "Issues" function is clicked, since there are no problems that can be resolved automatically.

The list of conflict types and whether they can be resolved or ignored varies from feature to feature. Please refer to the chapters "Document Status", "Document Revision", "Revise Where Used Documents", "Update Documents" and "Update Where Used Documents" in the PDM Studio Help for the corresponding restrictions.

Example of releasing documents without predefining the default settings in the Client Administrator

The following procedure applies from MP07 onwards.

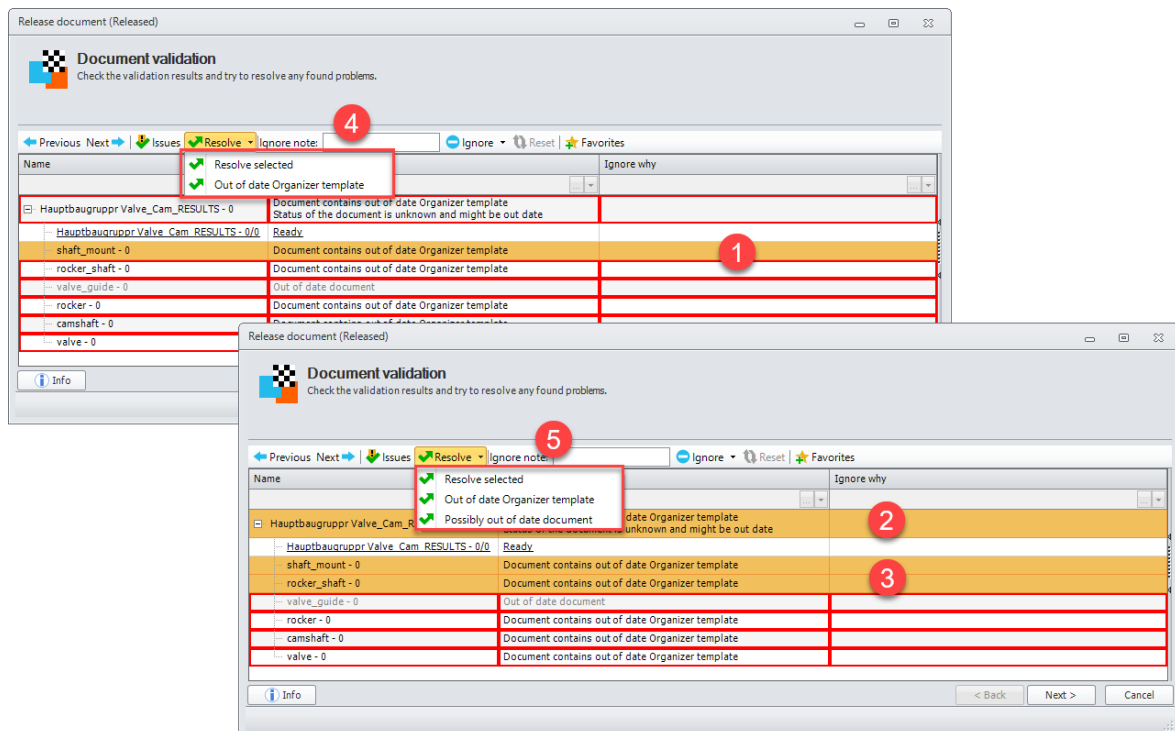


In the "Document validation" step, the identified problems are displayed first as before (3).

Only the "Issues" button and the "Ignore note" edit box are active. The "Resolve" button (1) and the "Ignore" drop-down menu (2) are initially grayed out.

There are two ways to activate the "Resolve" and "Ignore" functions.

Option 1 – Selective selection

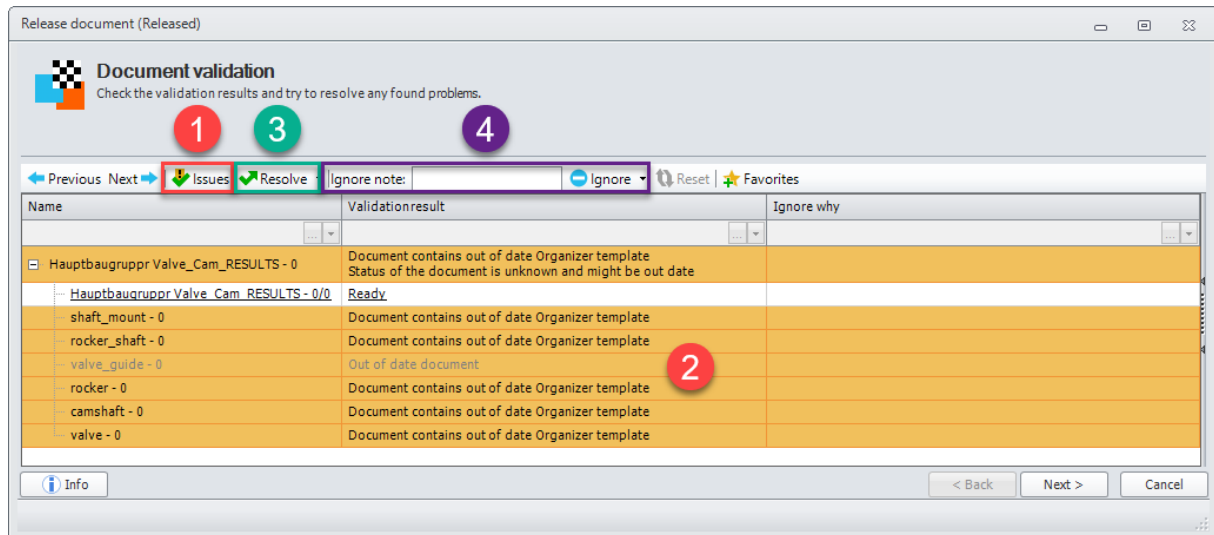


Selecting one (1) or several (2,3) issues from the list activates the "Resolve" button (4,5).

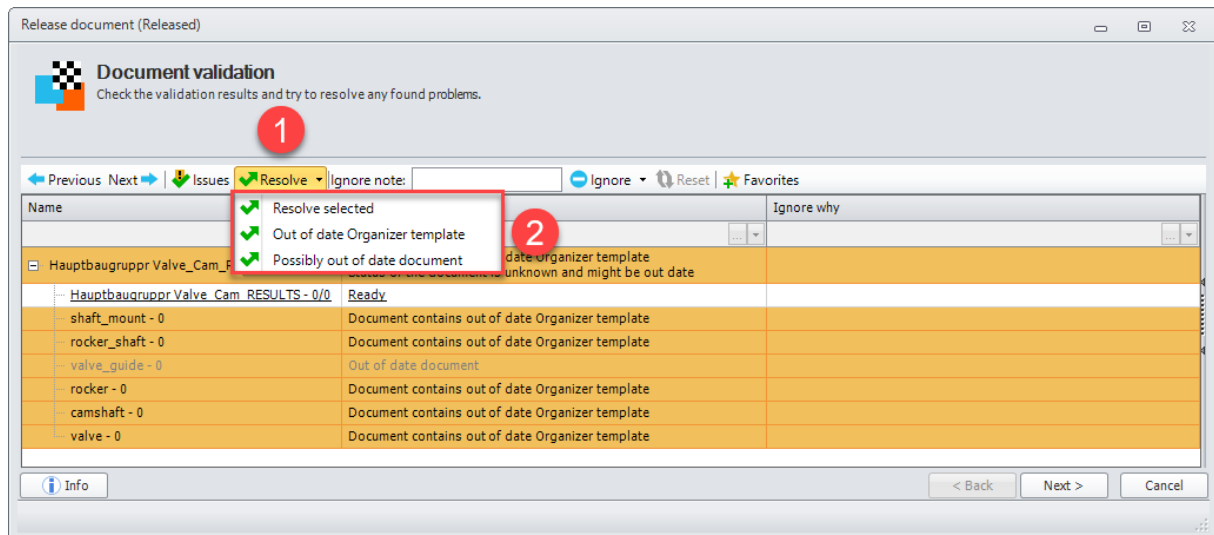
Clicking on the "Resolve" function opens a selection box. This shows the problems with the selected documents.

You can now either **resolve the problem by selecting it from the list** one at a time or resolve all problems at once with "Resolve selected".

Option 2 – Resolve all issues



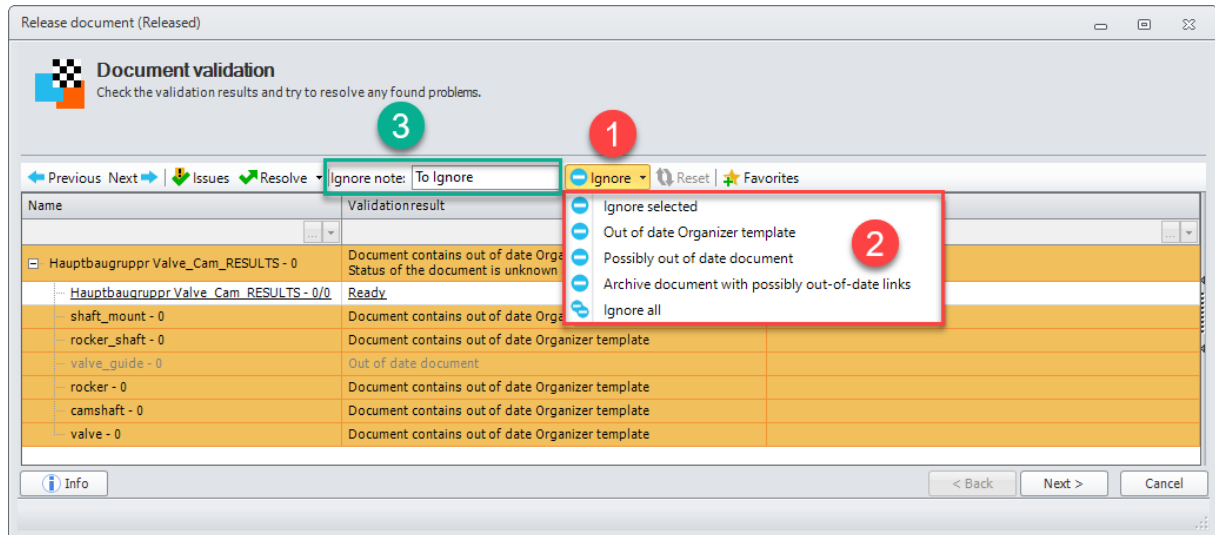
To select all issues, click the "Issues" button (1), which will **highlight all issues (2)**. The "Resolve" button (3) and the "Ignore" drop-down menu (4) will then be active.



Click on the "Resolve" button (1) to open the selection box listing the **problems found (2)**.

You now have the option to **resolve all selected problems at once** using the "Resolve selected" function, or to resolve the listed problems one at a time by clicking on each problem entry. This allows you to solve individual problems and ignore others if you do not want to solve them.

Important: If, as in our example, there are combination problems (the component built into the assembly is a "Possibly out of date document" AND contains "Archive document with possibly out of date links"), the solvable problems will be solved automatically, and the others must be "Ignored" and then appear in the "Ignore" drop-down list.



Problems that need to be ignored, that you choose to ignore, or that contain a combination of problems are displayed by clicking the "Ignore" button (1).

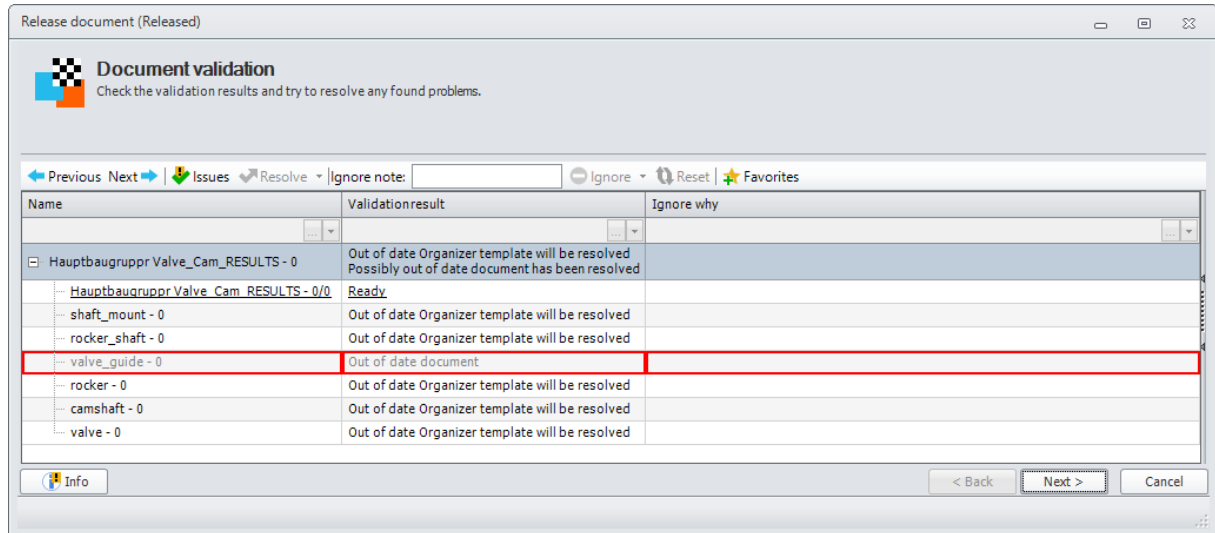
Important: A list of the problems found will be displayed (2). For each problem to be ignored, an „Ignore note" text (3) MUST be entered.

In our example, the problem "Archive documents with possibly out of date links" cannot be fixed but must be ignored and appears in the "Ignore" list after the solvable problem "Possibly out of date document" in the document has been fixed.

Important: If the result of the document check contains only documents whose problems CANNOT BE RESOLVED, the "Resolve" function remains grayed out after selecting the "Issues" function. In this case, only the "Ignore notes" input field and the "Ignore" button are active.

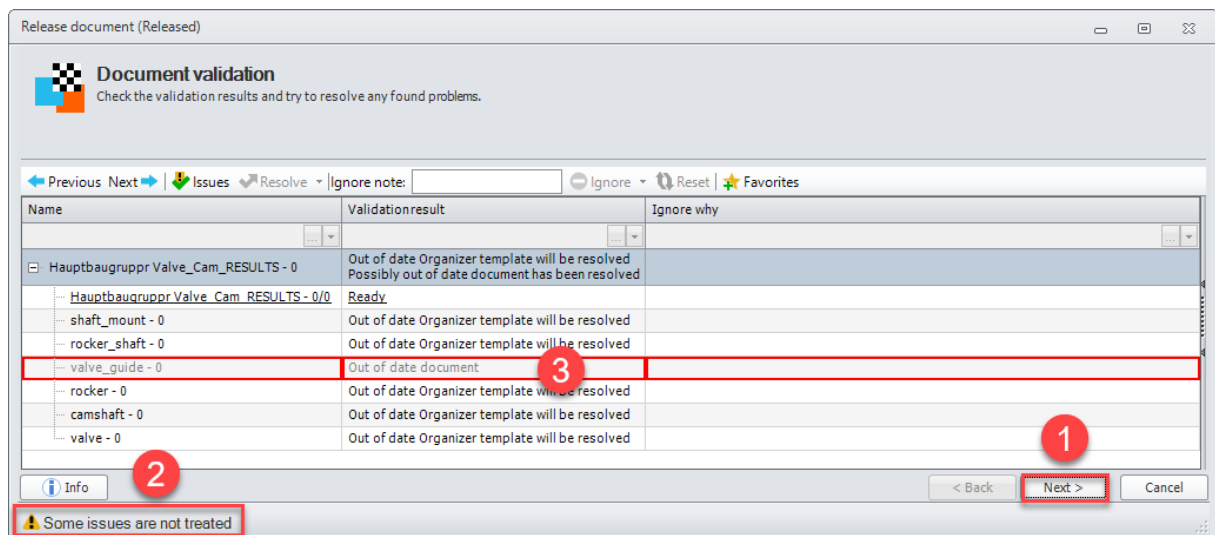
Example of releasing documents with presetting's in the Client Administrator

If the validation rules are predefined in the Client Administrator, these default settings are automatically applied in the wizards in the "Document validation" step.

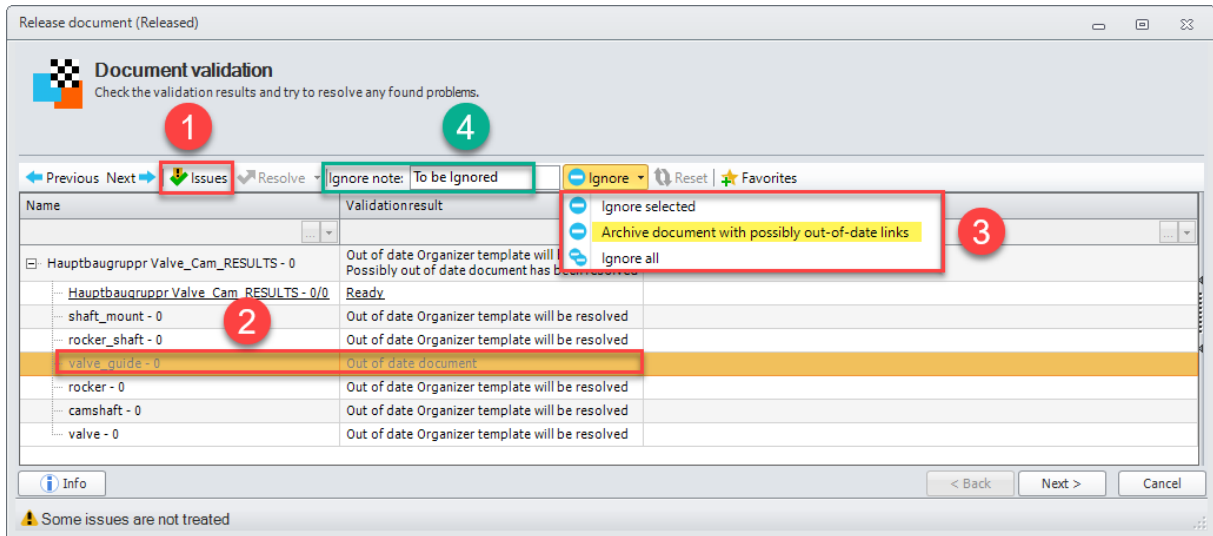


Issues that cannot be resolved are displayed in red. Problems with Out of date documents cannot be resolved in the Release Wizard. They can only be ignored. However, there are two issues with this document. Firstly, the document contains an Out of date Organizer template, this conflict has been resolved, and secondly, the document is Out of date. This cannot be resolved but must be ignored as mentioned above.

The "Resolve" and "Ignore" functions are initially disabled.



When you click "Next >" (1), an error message (2) is displayed for the document (3) and the wizard cannot proceed until all conflicts are resolved.

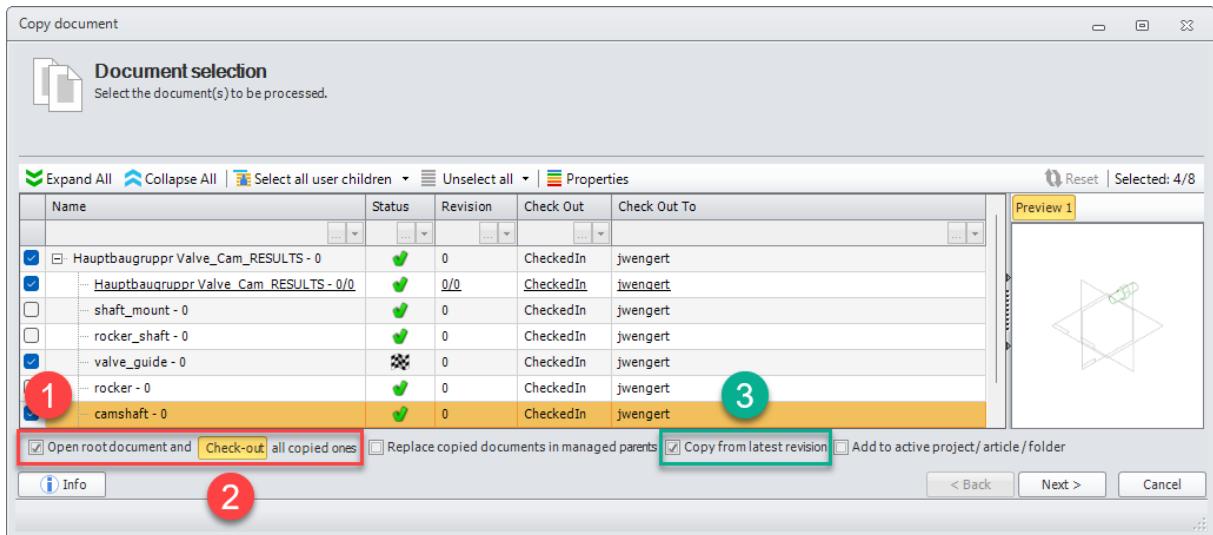


Click the "Issues" button (1) or select the item from the list (2). The "Ignore" function is now active and the reason for the issue (highlighted in yellow) (3) is displayed in the list. In this case, the reason for ignoring must be entered in the "Ignore note" field (4).

Once all issues are resolved, you can proceed with the wizard.

Enhancement of the Copy Wizard

In MP07, the options for the first step of the Copy Wizard have been changed and a new option has been added.



Merged options:

The previous options "Open root document" and "Check-out all copied documents" have been merged into the new option "Open root document and "Check-out" all copied ones" (1).

Select the "Open root document and "Check-out" all copied ones" checkbox (1) to open the root document when the copy operation is complete. This activates the "Check-out" button (2), which is used to check out all copied documents when the copying process is complete. The "Check-out" button (2) is a switch that activates the checkout function when activated. If the button is not activated, the copied documents will not be checked out.

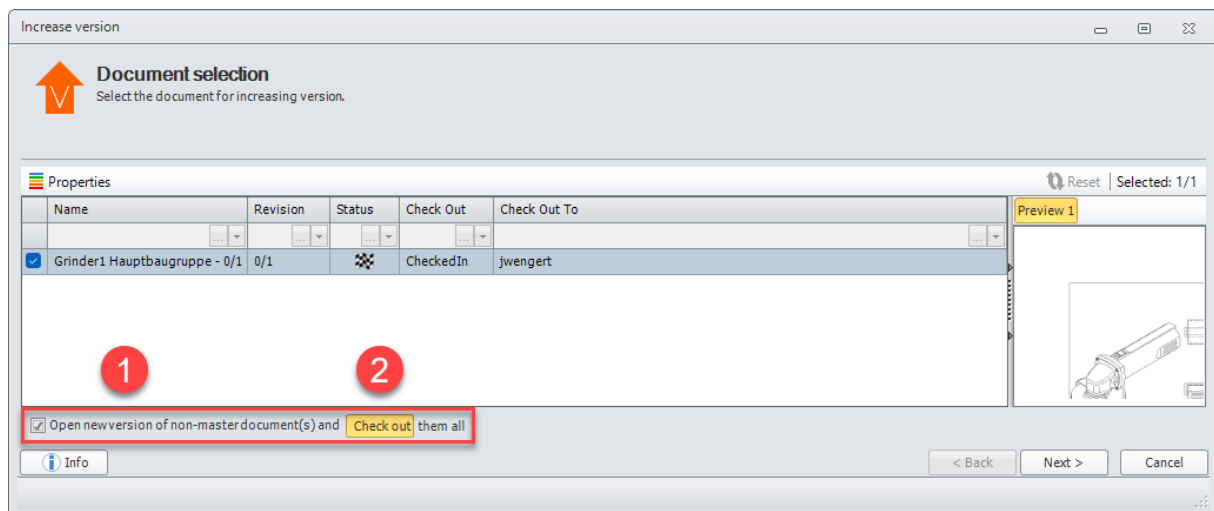
Example: When an assembly and some of its components are copied and this option is enabled, the assembly is opened when the process is finished. Optionally, the copied components can be "Checked out" after the process is complete.

Note: The "Check-out" switch is enabled by default when using this option.

New Option:

A new option "Copy from last revision" (3) has been implemented. If the selection contains out of date documents and these are selected, the latest revisions will be copied instead of the existing revisions when the "Copy from last revision" option (3) is enabled.

Enhanced option in the Versioning Wizard for non-master documents



With MP07, the previous option "Open a new version of a non-master document" in the first step (Document Selection) of the Versioning Wizard has been replaced by the new option "Open new version of non-master document(s) and "Check out" them all" (1).

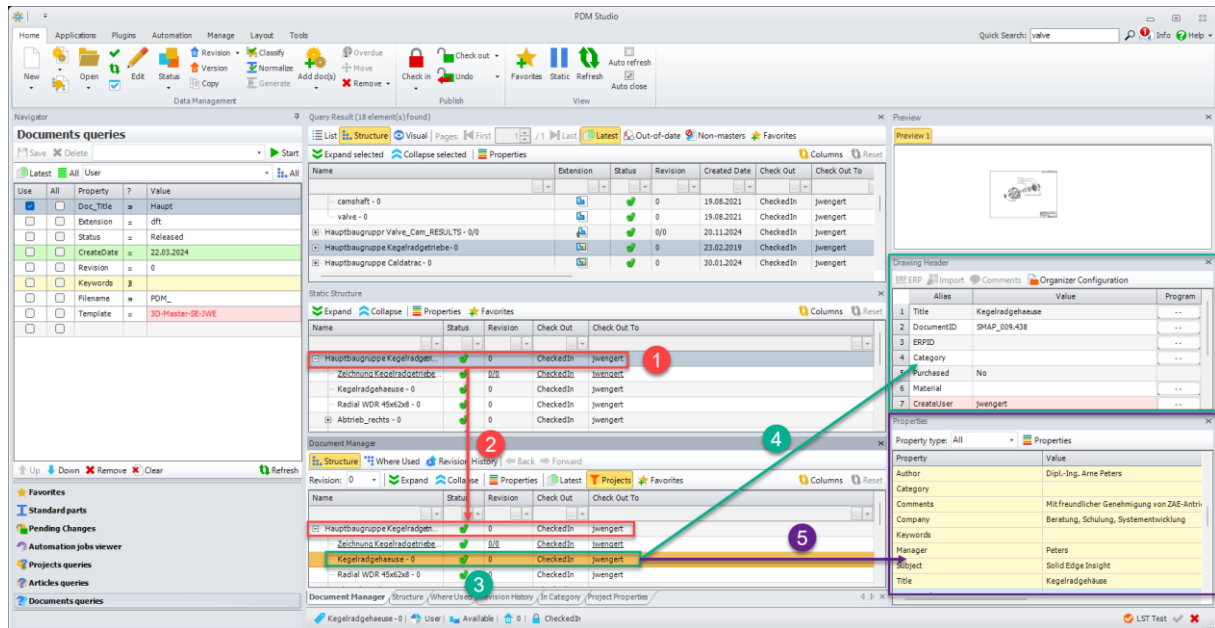
Enable the option "Open new version of non-master document(s) and "Check out" them all" (1) to open the newly created version when the versioning process is finished.

When this option is enabled, the "Check out" button (2) also becomes available. If the "Check-out" button is enabled, all versioned documents will be checked out when the process is complete. If the button is disabled, the versioned documents will not be checked out.

Note: The "Check-out" switch is enabled by default when using this option.

Panel hierarchy Static structure

As already described in the chapter Client Administrator, it is now also possible to set up a panel hierarchy in the Static Structure window, where the documents selected in the Static Structure window are inherited by the subordinated panels defined in the Client Administrator.



In our example, the assembly has been loaded and selected in the **Static Structure panel (1)**.

Once the assembly is selected, it is transferred to the **Document Manager panel (2)**.

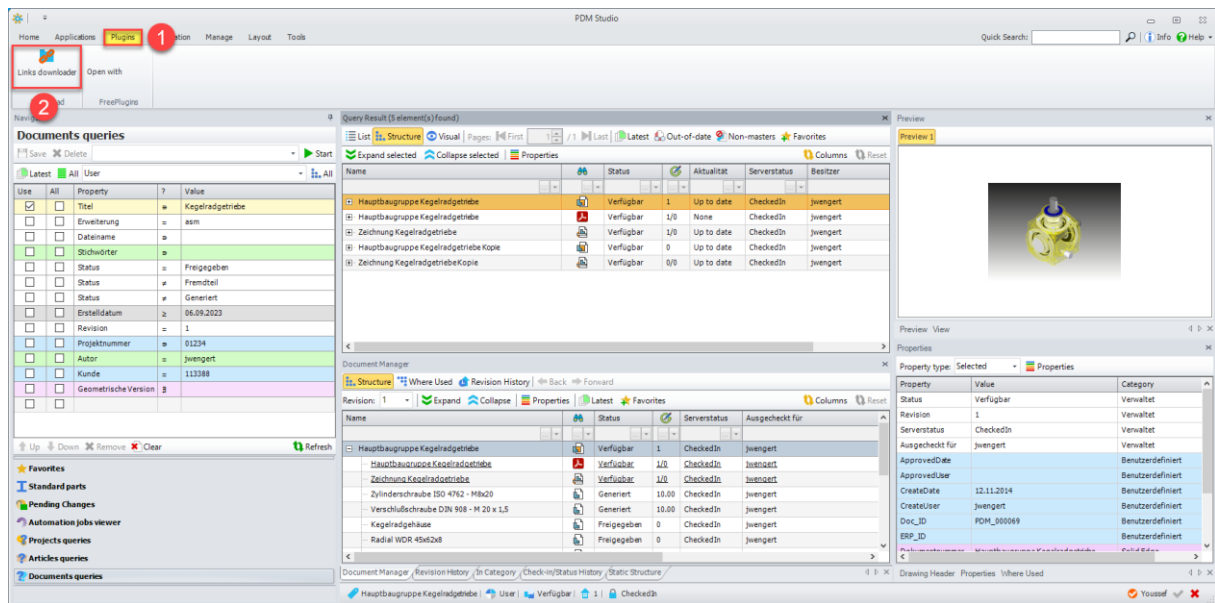
Now, when you select a document from the assembly in the **Document Manager panel (3)**, the document information is transferred to the **Drawing Header (4) and Properties (5) panels**, and the information from the document is displayed there.

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.

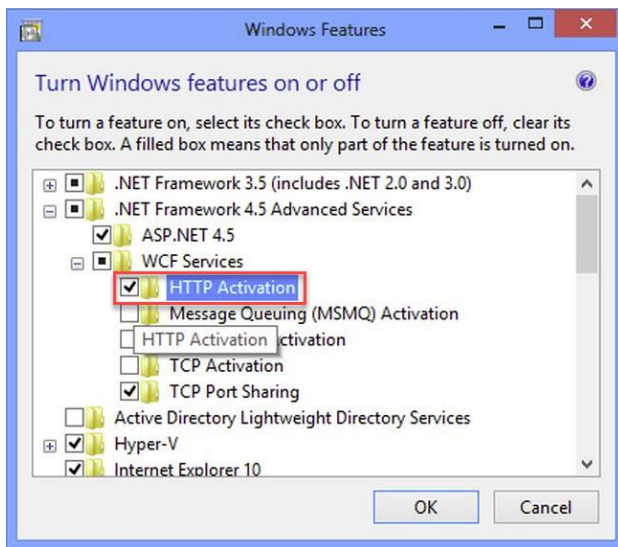
General

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. 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:



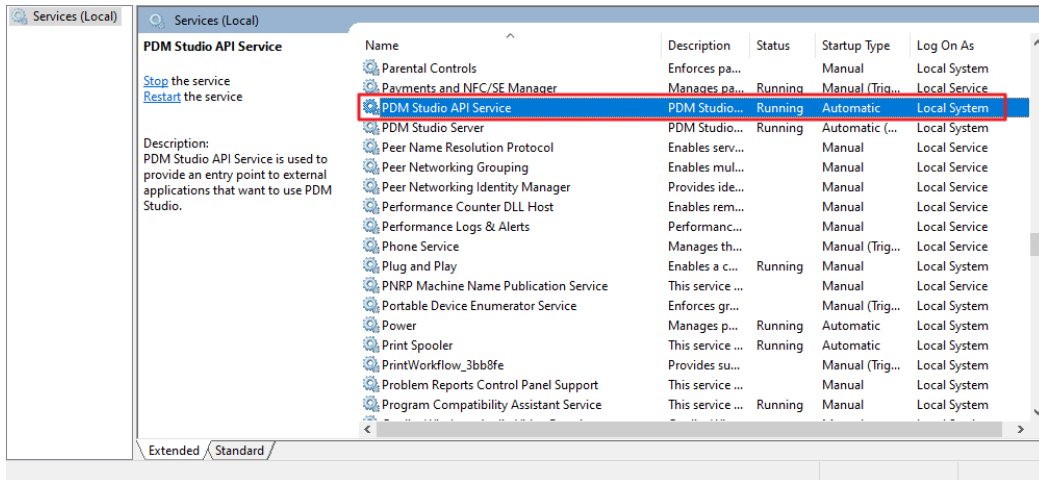
If the **Microsoft .NET Framework 4.8** is installed, go to the **Windows Features** in Windows Settings, and open the "Turn Windows features on or off" settings.

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

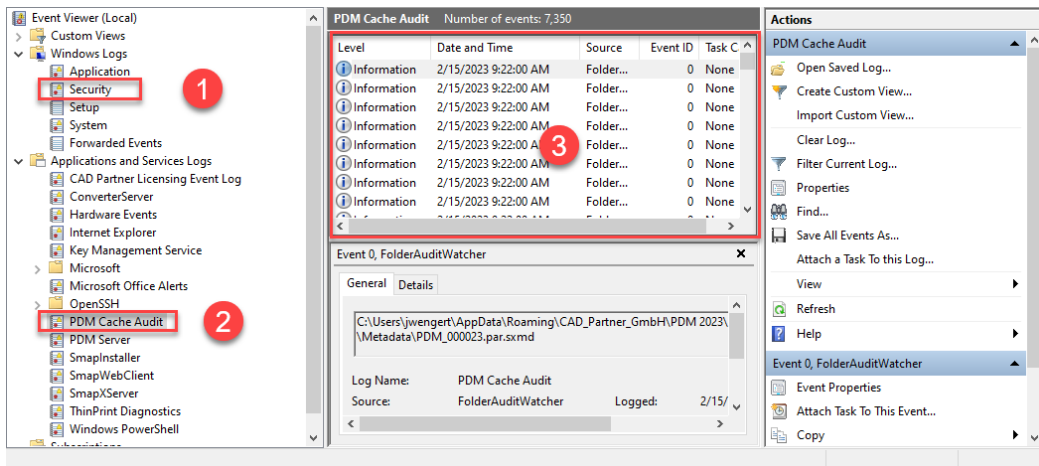
After that, all PDM applications should work again without problems.

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.



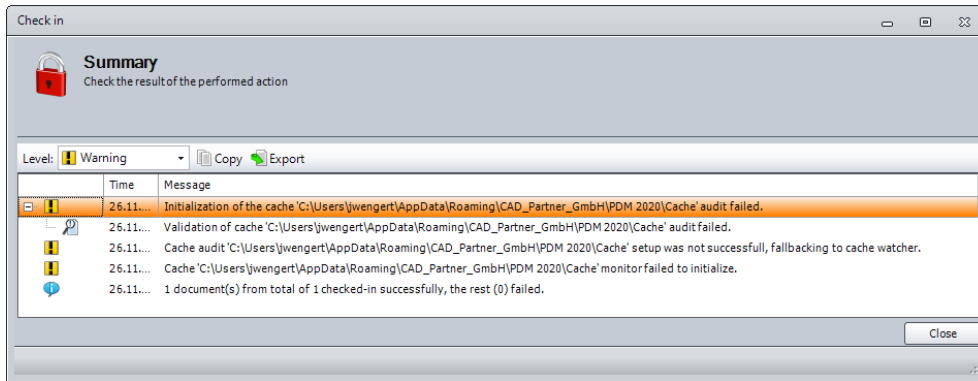
The most important point is that the PDM Studio API service **MUST** have access to the "Security" event log (1).

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 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:



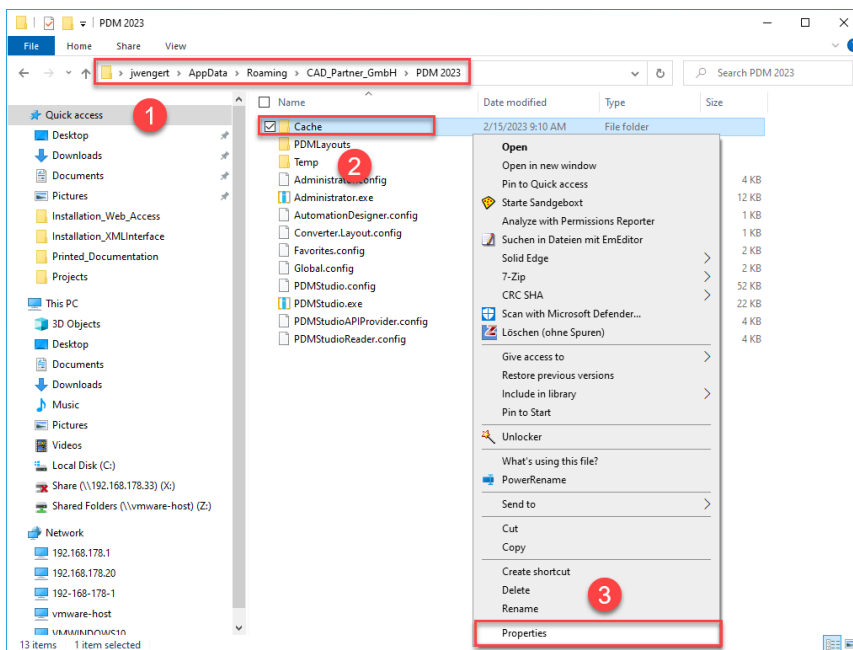
Important: This is because the company's security policy cannot be changed directly from the workstation, but is controlled globally by IT.

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

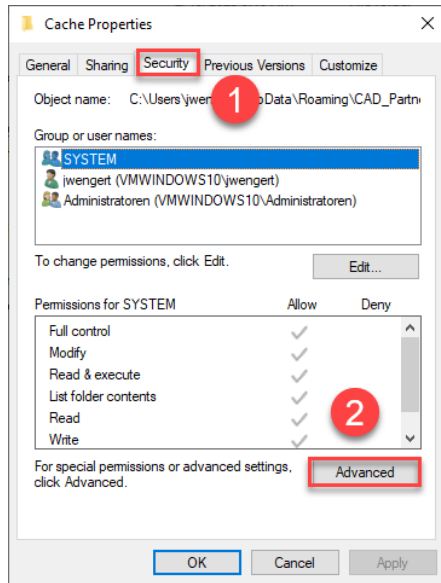
If this happens, check the following Windows settings.:

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

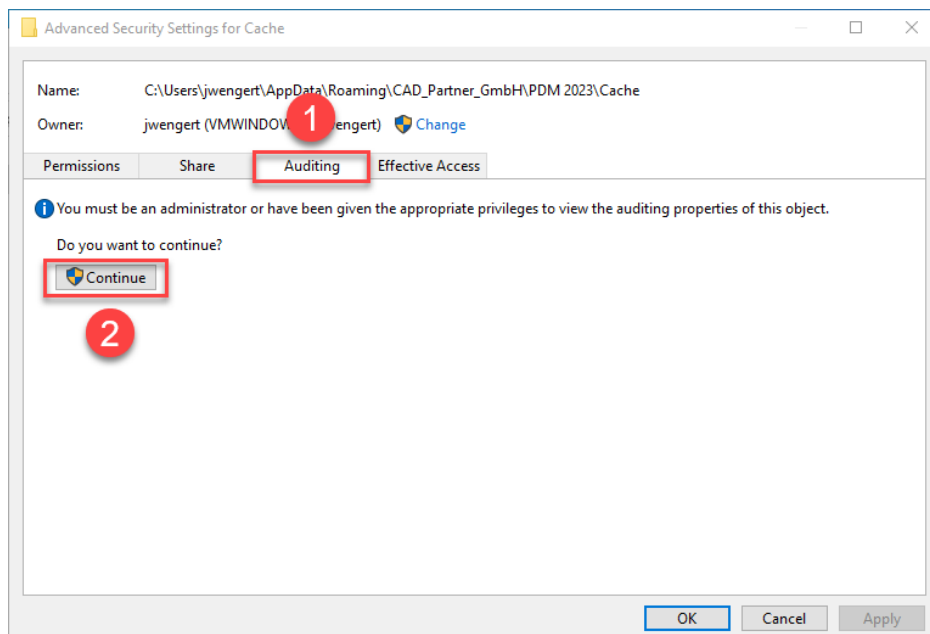
Usually: "C:\Users\[User]\AppData\Roaming\CAD_Partner_GmbH\PDM 2023"



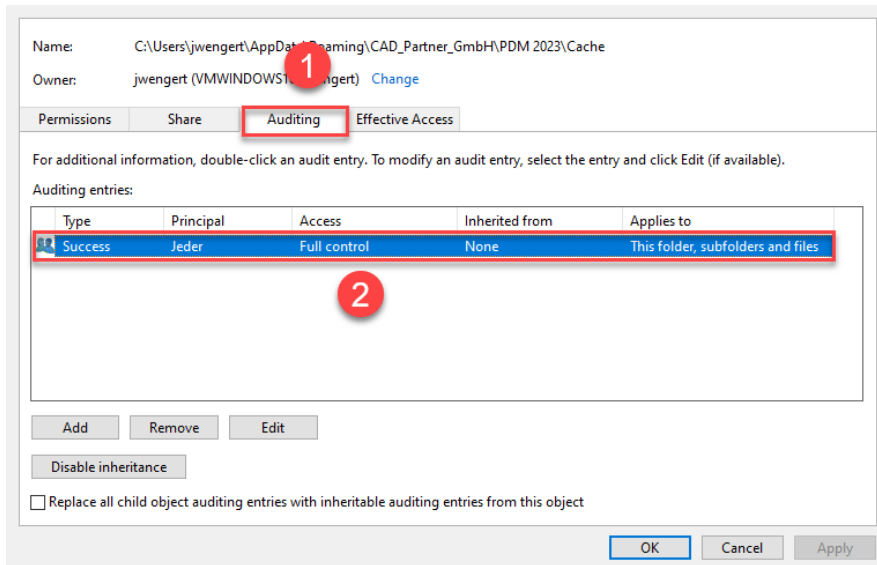
Right-click on the "Cache" folder (2) and select the "Properties" (3).



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

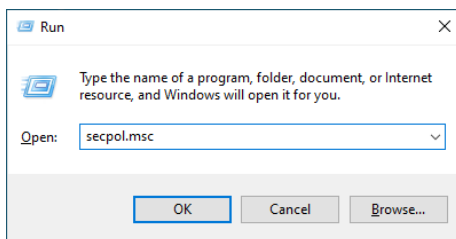


In the "Advanced security settings" of the cache directory, select the "Auditing" tab (1) and then click Continue (2).



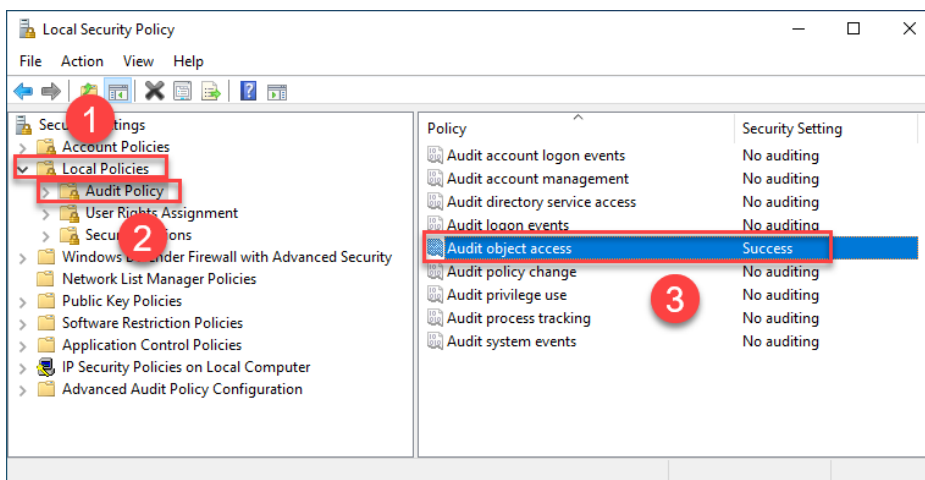
Go to the "Auditing" tab (1). To be able to monitor successful access to the cache folder and all its subfolders and files, "Full control" (2) over this folder and all its subfolders and files **MUST** be configured for everyone without any restrictions. If this is the case, then everything is fine here.

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

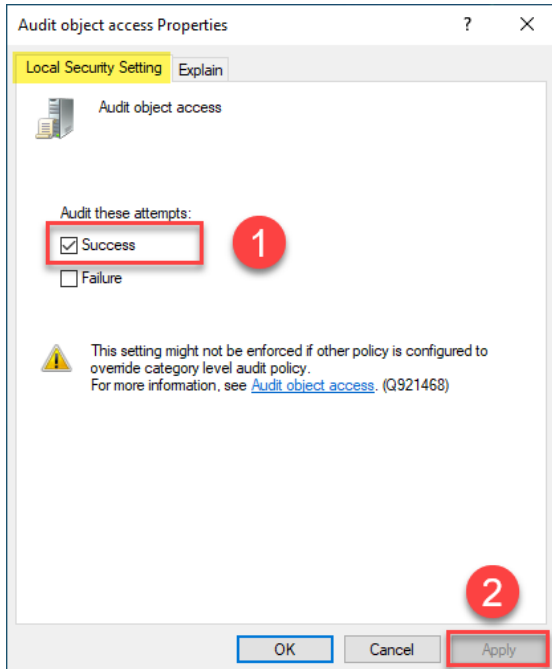


Then enter the command "secpol.msc". The Local Security Policy will be started.

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.

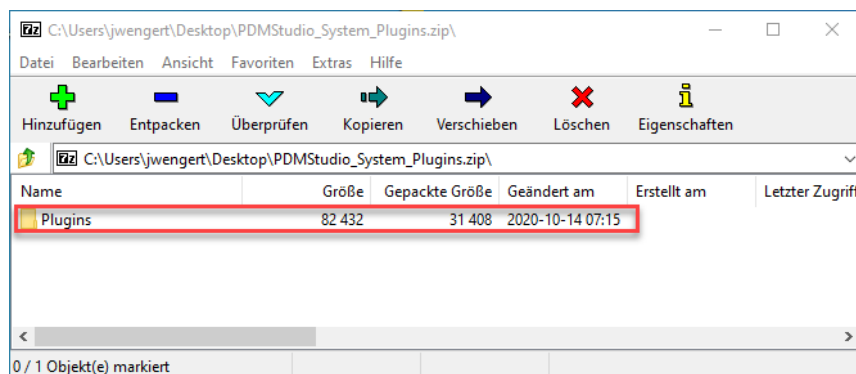
For more information on installing the Free- and Freeconverter plug-ins, refer to the Installation Plug-ins chapter in the "PDMStudio_Installation_2023_EN.pdf" document.

Add - Add-On Tools

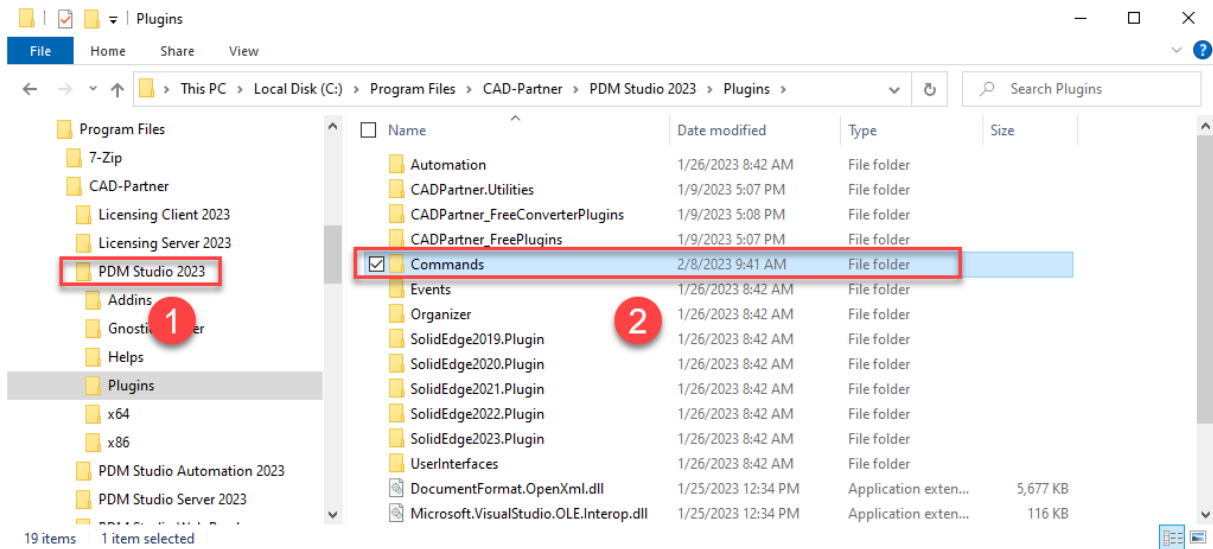
The "Unmanaged Export" function is not included in the installation package of the standard software and must be installed separately after installing the 2023 version.

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.

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".

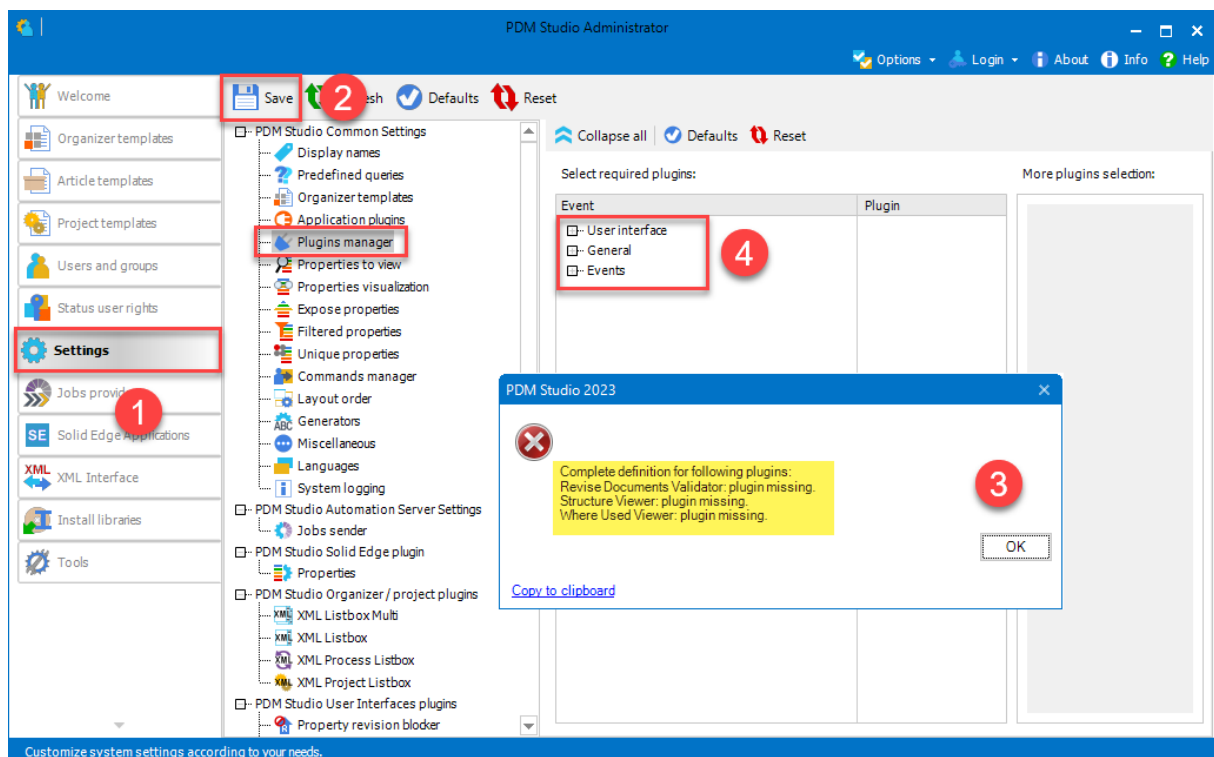
Note: The "SmapX.Client.Tools.dll" contains functions specific to your company's PDM Administrator. Therefore, it must be copied ONLY once to the PDM Administrator's computer. If you need to use these special functions - our support will inform you.

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

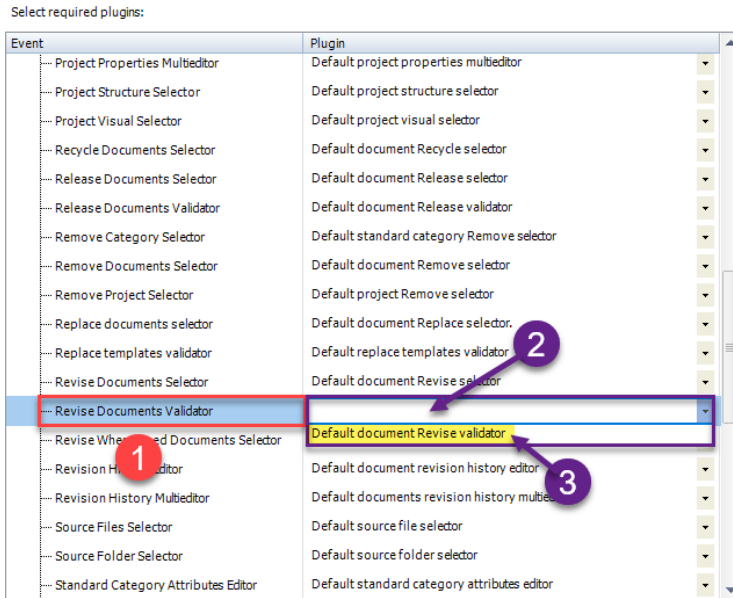
Each installation may also bring new settings to the Client Admin. You will need to manually configure these settings.

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.

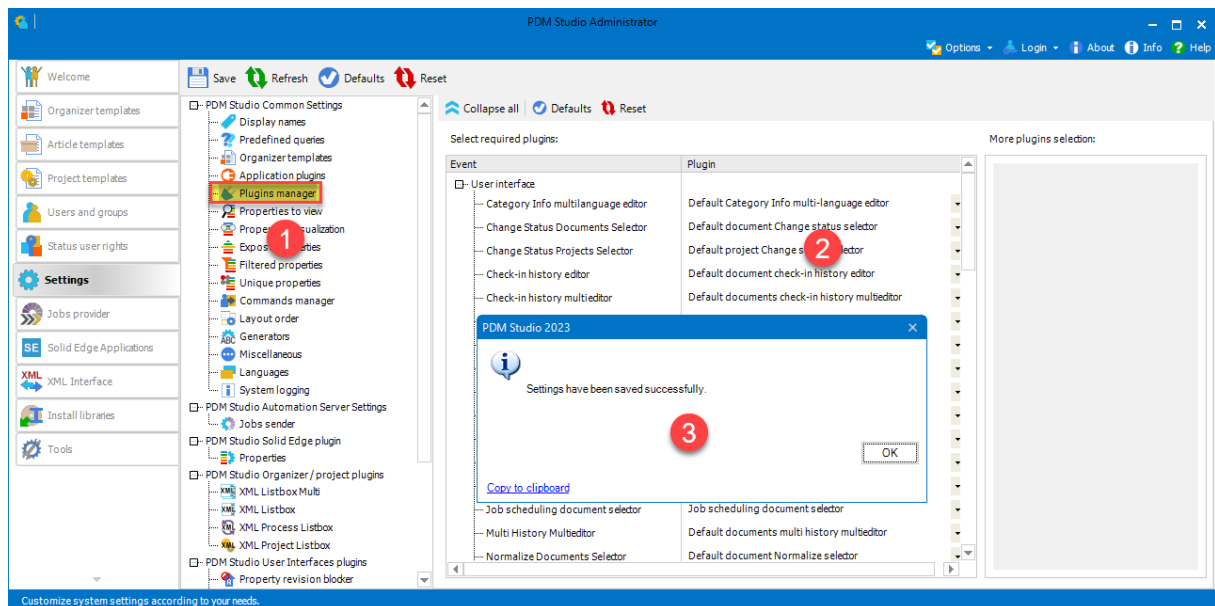
Expand the Event where the Plugin is located, in our example "User interface" and scroll down until you see the mentioned Plugins (image above (3)) "Release Documents Validator" (image below (1)).



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).



Other enhancements/improvements/changes/fixes/bugs

Enhancements

Module	Description
NX integration	Added support for NX 2312.
PDM Studio API	Added API support for .NET 8.0.
Solid Edge integration	Added support for Solid Edge 2025.
Solid Edge integration	Added support for Solid Edge Browse command when inserted assembly copy is edited.
SOLIDWORKS integration	Added support for SOLIDWORKS 2025.

Improvements:

Module	Description
Automation Administrator	Added a new info text to Job Storage configuration about Automation Server service.
Client Administrator	Unified tooltips for Plugin Manager - Events tooltips.
NX integration	Improved installation of the NX integration about automatic detection of already installed NX version.
PDM Studio	Improved working with Import user documents wizards on the last Organizer step. When user went back all filled data was lost.
PDM Studio	Improved texts and icons of the Scheduling wizard for sending Automation jobs.
PDM Studio Server	Improved the bulk validation of the global and template uniqueness in multieditors (Part Keeper).
Server Administrator	Added validation before the restore process for database content. The restore is valid only to "empty" databases.
Solid Edge integration	Optimized saving of draft and assembly documents in Solid Edge. It touches mainly documents where Up To Date flag is updated.

Changes:

Module	Description
General	Textbox unique in project templates is no longer supported for process properties.
General	"Copy Selection" (Ctrl+C in table editors) does not copy headers anymore (compatibility issue).
Installation	Microsoft .NET 8.0 installation is set as prerequisite of Client, Server, Automation and XMLI installations.
Part Keeper	Not unique property values are logged as errors instead warnings.
PDM Studio	Previews names in Unmanaged export follow names of exported documents now.

Repaired Bugs:

Module	Description
Automation	Fixed the email notification content of Automation jobs where reported successfully and unsuccessfully plugins were shift.
General	Fixed initialization of all PDM Studio clients when not unique plugins are found.
General	Fixed the PDM Studio database migration from PDM Studio 2020 to PDM Studio 2023 for specific situation of project links.
Installation	Fixed inability to silent uninstall PDM Studio and XML interface.
Installation	Fixed inability of the silent uninstallation of PDM Studio and XML interface.
Migration	Fixed detection and reporting filename duplicities after migration recovery without of the application restart.
MS Office integration	Fixed an exception when standard properties are read/written from/to MSO Excel file created without standard properties property set.
Part Keeper	Fixed missing validation of the template property uniqueness for non-master documents. Validation was only on PDM Studio server but directly in PK GUI was missing.
PDM Studio	Fixed assigning already checked-out documents in the 'finish' process of Import Folders wizard. Logging has been improved.
PDM Studio	Fixed checking of the "change links" permission during "move folder" operation.
PDM Studio	Fixed displaying a warning message during validation of unique properties. This message was displayed twice redundantly.
PDM Studio	Fixed the unmanaged export of the highest link revisions.
PDM Studio	Hidden the redundant Filter button in Static structure panel.
PDM Studio	Fixed freezing the Release document wizard when there is internally some check-out document.
PDM Studio	Fixed translation of the 'Ignore All' button in validation step of Revise, Release and Copy document wizards.
PDM Studio	Fixed checking of template uniqueness for non-master documents during Document revision process. All non-master documents in one range can have not unique values.
PDM Studio	Fixed an exception when the same project is selected more times in Query Result panel and Replace project template wizard is started.
PDM Studio	Fixed reported redundant errors when root project is moving back to the root.
PDM Studio	Fixed freezing the Updater document wizard when there is internally some check to document and message about 'check-in' process is wrongly displayed.
PDM Studio	Fixed possibility to define properties to view in Document Manager panel Revision History view.
PDM Studio	Fixed setting of default options in Unmanaged Export wizard.
PDM Studio	Fixed getting documents from Update wizard model by external plugins.

PDM Studio Reader	Fixed disabling Set and Remove active project buttons in PDM Studio Reader.
Solid Edge integration	Fixed an API communication issues when drawing has been created in Solid Edge 2024 and immediately checked-in.
Solid Edge integration	Fixed freezing of the Increase document version wizard started directly from PDM Studio Solid Edge integration.
Solid Edge integration	Fixed getting stuck the Solid Edge PDM Studio integration ribbon bar because endless synchronization running when assembly contains cyclic links.

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