

What's New

SOLIDWORKS ENTERPRISE PDM 2012



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3S SOLIDWORKS
LET'S GO DESIGN

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Introduction

This guide describes new and changed SolidWorks® Enterprise PDM capabilities in the 2012 release.

Intended Audience

This guide is for experienced users of the SolidWorks Enterprise PDM software.

SolidWorks Enterprise PDM

Available as a separately purchased product that can be used in SolidWorks Standard, SolidWorks Professional, or SolidWorks Premium.

This chapter includes the following topics:

- **Administration Tool**
- **File Explorer and SolidWorks Add-in**
- **Product Support**
- **System Performance**
- **Web Client Access Extended**

Administration Tool

Customized Enterprise PDM Menus

You can customize how menus and submenus are displayed in the Windows Explorer user interface.

You can change the available commands and command order for these menus on the Enterprise PDM Menu bar:

- **Actions**
- **Modify**
- **Display**
- **Tools**

You can customize shortcut menus that display in the File View pane when:

- Files are selected
- Folders are selected
- Nothing is selected

Customizing Menus

Use the Menus page of the Settings dialog box to customize menus displayed to users in the Windows Explorer File View.

To customize a user's menus:



1. In the Administration tool, expand **Users** and double-click the user whose menus you want to customize.
2. In the Properties dialog box, click **Settings**.
3. In the left pane of the user's Settings dialog box, click **Menus**.


4. In the **Destination Menu** drop-down list, select the File View menu to modify:



Background Right click	The shortcut menu displayed when the user right-clicks with nothing selected.
File Right click	The shortcut menu displayed when the user right-clicks with a file selected.
Folder Right click	The shortcut menu displayed when the user right-clicks with a folder selected.
Bar\Actions	The Actions menu on the Enterprise PDM menu bar.
Bar\Modify	The Modify menu on the Enterprise PDM menu bar.
Bar\Display	The Display menu on the Enterprise PDM menu bar.
Bar\Tools	The Tools menu on the Enterprise PDM menu bar.

The commands for the selected menu are listed.

5. Do any of the following:

- To remove a command, select it and click .
- To add a separator to the menu, select the command you want below the separator and click .
- To add a command to the menu, under **Available commands**, use the Flat list or Categorized tabs to display the available commands.

Drag the command to the location you want or click  to add the selected command to the bottom of the menu.

- To change the location of a command or divider in the menu, select it and click  or .

6. To modify another menu, repeat steps 4 and 5.



You can add the same command to multiple menus.

7. Do one of the following:

- Click **Apply** to save your changes and close the Settings dialog box.
- Click **Cancel** to close the Settings dialog box without saving your changes.

When prompted to confirm that you do not want to save changes, click **Yes**.

Copying Menu Settings

You can create customized menus for one user and copy them to other users.

To copy customized menus from another user:

1. On the Menus page of the Settings dialog box, click **Copy**.

2. In the Copy Menu Settings dialog box, under **Menus to copy**, do one of the following:
 - Select **<Copy All Menus>**.
 - Select a specific menu to copy.
3. Under **Source user**, select the user whose settings you want to copy.
4. Click **OK**.
5. Click **Apply**.

Returning to Default Menu Settings

You can return a user's menus to their default settings. Resetting returns all menus to their default settings.

1. On the Menus page of the Settings dialog box, click **Reset**.
2. When prompted to confirm that you want to reset all menus, click **OK**.

Displaying Full User Names in the User Interface

If login names are cryptic, you can display users' full names in the user interface to make it easier to identify who is using a file.

In Enterprise PDM, user names are displayed to indicate who has checked out or created files, sent or received mail messages, or initiated actions performed on files.

If your company creates users with truncated user names, for example, by importing users from Windows Active Directory, it may be difficult to identify individuals just by their login names.

You can modify your user settings in the Administration tool to specify that the full names of users are displayed throughout the user interface.

Compare these examples of the **Checked Out By** column in File View in Windows Explorer:

Login names displayed:

Name	Checked Out By
Bevel Gears.SLDASM	Dev1
Base.SLDPRT	Dev2
bevel3.SLDPRT	Dev2
Bevel Gears.avi	Mgt2
Bevel_Gearing.pdf	Sales1
Optimized_Straight_Bevel_Gear.pdf	Sales1

Full names displayed:

Name	Checked Out By
Bevel Gears.SLDASM	Paul Burke
Base.SLDPRT	Donna Parsons
bevel3.SLDPRT	Donna Parsons
Bevel Gears.avi	Irina Tresvik
Bevel_Gearing.pdf	Amit Sagi
Optimized_Straight_Bevel_Gear.pdf	Amit Sagi

To display full user names:

1. In the left pane of the Administration tool, expand **Users**.
2. Right-click your user name and click **Settings**.
3. In the left pane of the Settings dialog box, click **Explorer**.
4. Under **Miscellaneous**, select **Show full user names**.
5. Click **Apply**.

Replication Failover

Replication has been made more fault-tolerant to handle WAN scenarios where not all servers are available at all times.

If the first attempt to retrieve a file fails, the Archive server uses a lookup table to select other servers from which to replicate the file. This table prioritizes servers based on replication settings you provide using the Administration tool. If each attempt to get the file fails, the Archive server retries the operation.

By default, the replication server retries twice before it times out. You can change the number of retries by creating a new DWORD key on the archive server called `RetriesCount` at the following registry location:

```
HK_LOCAL_MACHINE\SOFTWARE\SolidWorks\Applications\
PDMWorks_Enterprise\ArchiveServer\Vaults\vault_name
```

The hexadecimal value you set for the `RetriesCount` keyword controls the number of retries.

File Explorer and SolidWorks Add-in

Browse to Option

The **Browse to** option on the shortcut menu of the Contains and Where Used tabs changes the focus of the tab to the referenced file to which you browse.

In previous versions, the **Browse To** option opened a new Windows Explorer window. In SolidWorks Enterprise PDM 2012, the **Browse to** option changes the focus to the referenced file without opening a new window.

The new behavior also applies when you navigate to vault files using the File Explorer Contains and Where Used tabs in the Open and Save As dialog boxes. This behavior occurs whether you access the dialog boxes from the SolidWorks software or from any standard Microsoft Windows application such as Notes and Microsoft Office.

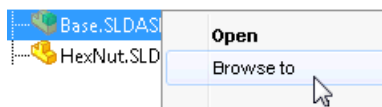
You can also open a new window using the new **Browse to in a New Window** option.

Using Browse to

Use **Browse to** when you want to change focus to a referenced file without opening a new dialog box.

This example describes how to change the focus of the Contains tab to a referenced file without opening a new dialog box.

1. In the File View pane, select a vault file and click the Contains tab to list the files it references.
2. Right-click a referenced file and click **Browse to**.



The focus of the Contains tab changes to the file you selected.

Using Browse to in a New Window



Use **Browse to in a New Window** when you want to open a new window with the focus on a selected file.

1. In the File View pane, select a vault file and click the Where Used tab to list the files that reference it.
2. Right-click a file, and click **Browse to in a New Window**.
A new window opens to the same folder and tab, but with the focus changed to the file you selected.
The original window remains open.

Exporting Indented Bills of Materials

You can preserve the indented structure of an Enterprise PDM computed bill of materials (BOM) or a saved BOM when you export it to a Microsoft Excel spreadsheet. When prompted, choose to add a Level column to the output file. The added column contains a numerical representation of the BOM's levels.

To preserve the indented structure of a BOM:

1. In Windows Explorer, select a vault assembly.
2. On the Bill of Materials tab, click **BOM Display - Indented** .
3. Click **Open As CSV** .
4. When prompted to create a Level column in the CSV file, click **Yes**.

A **Level** column, with numerical values representing the BOM structure, appears as the first column in the spreadsheet. You can use the column to sort the exported BOM.


Searching Within File-based Dialog Boxes

The embedded Enterprise PDM search lets you search for files and folders within Windows Explorer and all standard file-based dialog boxes.

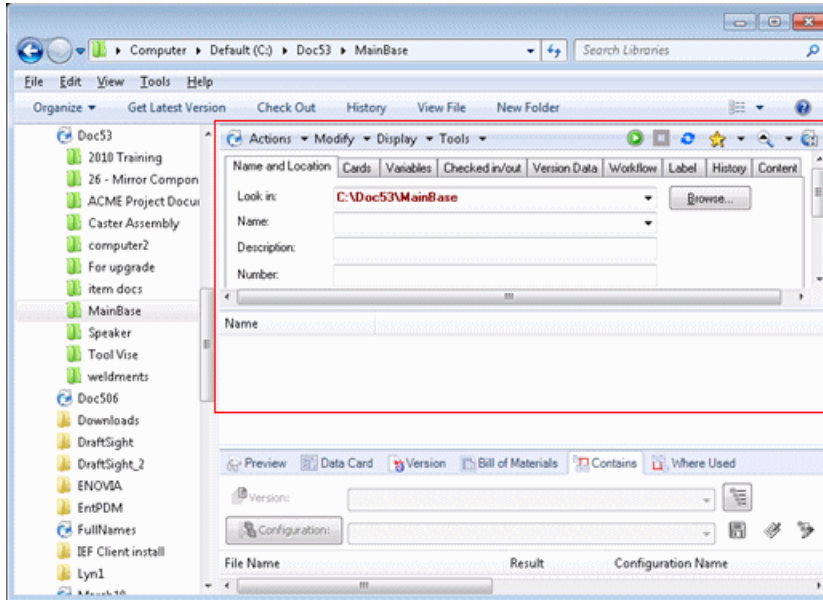
You can use this method to search from:

- SolidWorks file-based dialog boxes, such as Open, Save As, Insert, and Replace.
- The Open and Save As dialog boxes of applications such as Microsoft Word and Excel, and Adobe Reader.



To perform an embedded search:


1. Do one of the following:
 - Click **Open Search**  (Enterprise PDM menu bar).
By default, the **Complete Search** card is used.
 - If you have access to multiple file search cards, expand **Open Search** and select a search card to use.

The search card appears in the top right pane.



2. Do one of the following:


- Use the criteria on the card to define the search and click **Start Search** .
- If you have saved searches as favorites, expand **Favorite Searches**  and select the search to use.

3. To restore all fields on the search card to their default values, click **Clear Search** .

4. To close the embedded search, click **Close Search** .

The embedded search can only be used to search for files or folders. To search for items or users, use the Enterprise PDM Search tool.

To open the Enterprise PDM Search dialog box:

1. Expand **Open Search**  and click **Search Tool**.
2. Select the search card to use from the **Searches** list in the left pane.

Version Toggle on Where Used Tab

On the Where Used tab, you can use the **Version** button to toggle between viewing references for all versions of a file and selecting the file version for which references are displayed.

Additionally, a redesigned **Configurations** button on the Where Used and Contains tabs hides all configurations or lets you select the configuration to use.

Both the **Version** and **Configurations** toggle states persist:


- When you select a different file in File View
- When you change folders
- Between Enterprise PDM vault sessions

Displaying Versions

The **Version** button is active on the Where Used tab.

On the Contains tab, **Version** serves as a label for the version dropdown list. You can select specific versions, but you cannot select **<All Versions>**.

With a vault file selected in File View, on the Where Used tab, do one of the following:

- To display files that reference all versions of the selected file, to the left of the top drop-down list, click  Version: .

The **Version:** button is highlighted, and the drop-down list displays **<All Versions>**.



When all versions are displayed, you cannot select a specific configuration to display.

- To display files that reference a specific version of the selected file, click  Version: .

The **Version** button is no longer highlighted, and you can choose a specific version from the drop-down list.



The highlighted **Configuration** button indicates that you can select a configuration from the drop-down list.

Displaying Configurations

On both the Where Used and Contains tabs, the **Configuration** button lets you enable or disable the choice of configurations.

With a vault file selected in File View, use these methods to display configurations:

1. On the Contains tab:

- When the **Configuration** button is active, use the dropdown list to select the configuration for which to display referenced files.
- To deactivate the **Configurations** drop-down list, click **Configuration**.

The button becomes a label and the drop-down list indicates that you have chosen not to show configurations.



2. On the Where Used tab:

- a) If **Version** is active, click to deactivate it, and click **Configuration** to activate the ability to choose configurations.










The **Configuration** button is highlighted and the drop-down list becomes active.

- b) Use the drop-down list to select the configuration to display.






Dialog Box Toolbars

A toolbar has been added to the dialog boxes you use to manipulate groups of files. This makes it easier to access commands that were previously only available through a shortcut menu.

The toolbars contain new buttons and in some cases, modified buttons.

Button	Command	Description
	Select Files	Lets you use wildcards to select a group of files.
	Open File List	Opens a list of files in Microsoft Excel.
	Save File List	Lets you save the file list as a comma-separated .txt file.
	New flyout control:	
	Generate for configurations	Lets you link an item to a specific file configuration.
	Generate for files only	Lets you link an item to a file independent of configurations.
	New flyout control:	
	Referenced version	Uses the attached version of the references.
	Latest version	Uses the latest version of the references.

The following dialog boxes contain the toolbars:

Dialog Box	Access					
Get	Action > Get Latest Version Action > Get Version	X	X	X		
Check In	Action > Check In	X	X	X		
Check Out\ Undo Check Out	Action > Check Out	X	X	X		
Do Transition	Modify > Change State	X	X	X		
Increment Revision	Modify > Increment Revision	X	X	X		X
Link Files to Item	From Item Explorer dialog box: Right-click an item and select Link Files to Item . Select one or more files and click Open .	X	X	X	X	X

Product Support

SolidWorks Enterprise PDM 2012 offers expanded support for CAD systems, Microsoft[®] Office, Internet Explorer[®], and 64-bit processors.

The following support is available:

CAD Tools	Microsoft Products	64-bit Platforms
SolidWorks 2012	Microsoft Office 2010	Enterprise PDM Web Server
AutoCAD [®] 2012	Internet Explorer 9	AutoCAD
Autodesk Inventor [®] 2012		Solid Edge
Solid Edge [®] ST3		

System Performance

System performance has been improved for users working with large data sets and users working remotely with Copy Tree and template-created documents.

- Improved system response time with large data sets

Users will now see significantly quicker system response when working with large data sets.

In previous versions of Enterprise PDM, long delays or system stoppages could occur when users worked with large data sets with many parent child relationships. Affected functions included viewing the information on the Contains tab in Windows Explorer or in a CAD add-in when the Archive refresh rate is set at a low value, for example, five seconds.

- Creating new documents from remote replicated sites with high latency connections to the SQL Server

It now takes less time for users in remote offices to create new documents using templates and the Copy Tree tool.

Combining the queries that save card variables has made the creation of documents from templates as much as three times faster.

Improved query methods have optimized WAN traffic for the Copy Tree operation, making the new response time up to 10 times faster.

Web Client Access Extended

The SolidWorks Enterprise PDM Editor license now includes access to the Enterprise PDM Web Client. This provides greater flexibility for users that are away from the office but still need to access the system, and for external users, such as vendors or customers, that need occasional access.

In addition to providing access to CAD applications, you can use Editor licenses to access the Web client to search the vault and perform basic functions to enable remote work processes.

Licenses in the license pool are used in this order:

- Contributor licenses

- Editor licenses
- Processor license