

# What's New

SOLIDWORKS ENTERPRISE PDM 2013

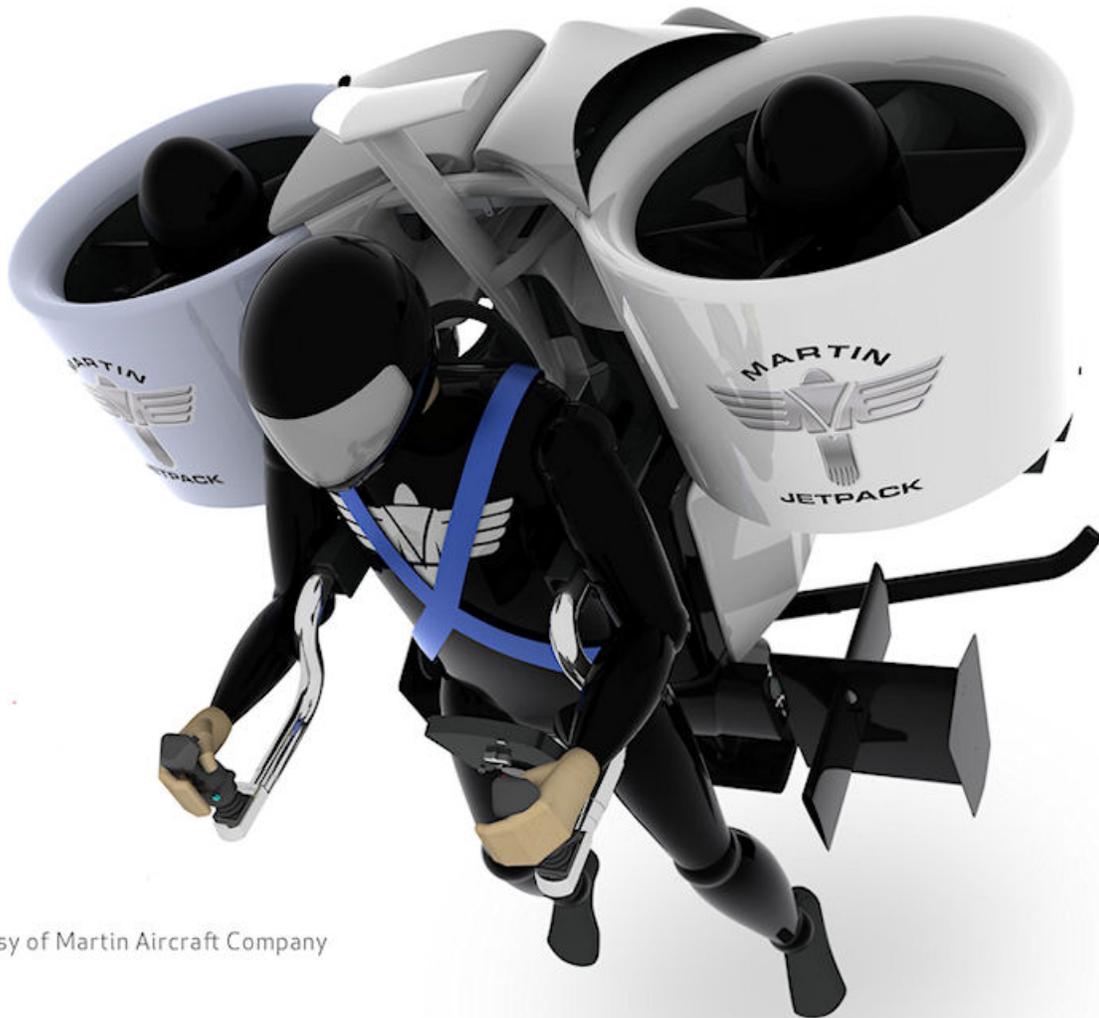


Image courtesy of Martin Aircraft Company

# Contents

---

Legal Notices.....	iii
Introduction.....	vi
1 SolidWorks Enterprise PDM.....	7
Administration Tool.....	7
Delayed in State Notifications .....	7
Parallel Workflow Transitions .....	8
Recently Used List.....	11
Workflow Editor Update .....	12
File Explorer and SolidWorks Add-in.....	15
Bill of Materials Tab Improvements.....	15
Close SolidWorks Files on Check In.....	16
Contains and Where Used Tab Improvements.....	16
Full Row Selection Highlighting in Windows Explorer.....	17
Notification Editor Update .....	17
Quantity Specification for Manually Created File References.....	19
User Information Pop-up .....	20
Version Free Variables .....	21
Windows Explorer Favorites Links.....	23

# Legal Notices

---

© 1995-2012, Dassault Systèmes SolidWorks Corporation, a Dassault Systèmes S.A. company, 175 Wyman Street, Waltham, Mass. 02451 USA. All Rights Reserved.

The information and the software discussed in this document are subject to change without notice and are not commitments by Dassault Systèmes SolidWorks Corporation (DS SolidWorks).

No material may be reproduced or transmitted in any form or by any means, electronically or manually, for any purpose without the express written permission of DS SolidWorks.

The software discussed in this document is furnished under a license and may be used or copied only in accordance with the terms of the license. All warranties given by DS SolidWorks as to the software and documentation are set forth in the license agreement, and nothing stated in, or implied by, this document or its contents shall be considered or deemed a modification or amendment of any terms, including warranties, in the license agreement.

## Patent Notices

SolidWorks<sup>®</sup> 3D mechanical CAD software is protected by U.S. Patents 5,815,154; 6,219,049; 6,219,055; 6,611,725; 6,844,877; 6,898,560; 6,906,712; 7,079,990; 7,477,262; 7,558,705; 7,571,079; 7,590,497; 7,643,027; 7,672,822; 7,688,318; 7,694,238; 7,853,940 and foreign patents, (e.g., EP 1,116,190 B1 and JP 3,517,643).

eDrawings<sup>®</sup> software is protected by U.S. Patent 7,184,044; U.S. Patent 7,502,027; and Canadian Patent 2,318,706.

U.S. and foreign patents pending.

## Trademarks and Product Names for SolidWorks Products and Services

SolidWorks, 3D PartStream.NET, 3D ContentCentral, eDrawings, and the eDrawings logo are registered trademarks and FeatureManager is a jointly owned registered trademark of DS SolidWorks.

CircuitWorks, FloXpress, PhotoWorks, TolAnalyst, and XchangeWorks are trademarks of DS SolidWorks.

FeatureWorks is a registered trademark of Geometric Ltd.

SolidWorks 2013, SolidWorks Enterprise PDM, SolidWorks Workgroup PDM, SolidWorks Simulation, SolidWorks Flow Simulation, eDrawings, eDrawings Professional, and SolidWorks Sustainability are product names of DS SolidWorks.

Other brand or product names are trademarks or registered trademarks of their respective holders.

## COMMERCIAL COMPUTER SOFTWARE - PROPRIETARY

The Software is a "commercial item" as that term is defined at 48 C.F.R. 2.101 (OCT 1995), consisting of "commercial computer software" and "commercial software documentation" as such terms are used in 48 C.F.R. 12.212 (SEPT 1995) and is provided to the U.S. Government (a) for acquisition by or on behalf of civilian agencies, consistent with the policy set forth in 48 C.F.R. 12.212; or (b) for acquisition by or on behalf of units of the department of Defense, consistent with the policies set forth in 48 C.F.R. 227.7202-1 (JUN 1995) and 227.7202-4 (JUN 1995).

In the event that you receive a request from any agency of the U.S. government to provide Software with rights beyond those set forth above, you will notify DS SolidWorks of the scope of the request and DS SolidWorks will have five (5) business days to, in its sole discretion, accept or reject such request. Contractor/Manufacturer: Dassault Systèmes SolidWorks Corporation, 175 Wyman Street, Waltham, Massachusetts 02451 USA.

### **Copyright Notices for SolidWorks Standard, Premium, Professional, and Education Products**

Portions of this software © 1986-2012 Siemens Product Lifecycle Management Software Inc. All rights reserved.

This work contains the following software owned by Siemens Industry Software Limited:

D-Cubed™ 2D DCM © 2012. Siemens Industry Software Limited. All Rights Reserved.

D-Cubed™ 3D DCM © 2012. Siemens Industry Software Limited. All Rights Reserved.

D-Cubed™ PGM © 2012. Siemens Industry Software Limited. All Rights Reserved.

D-Cubed™ CDM © 2012. Siemens Industry Software Limited. All Rights Reserved.

D-Cubed™ AEM © 2012. Siemens Industry Software Limited. All Rights Reserved.

Portions of this software © 1998-2012 Geometric Ltd.

Portions of this software © 1996-2012 Microsoft Corporation. All rights reserved.

Portions of this software incorporate PhysX™ by NVIDIA 2006-2010.

Portions of this software © 2001-2012 Luxology, LLC. All rights reserved, patents pending.

Portions of this software © 2007-2011 DriveWorks Ltd.

Copyright 1984-2010 Adobe Systems Inc. and its licensors. All rights reserved. Protected by U.S. Patents 5,929,866; 5,943,063; 6,289,364; 6,563,502; 6,639,593; 6,754,382; Patents Pending.

Adobe, the Adobe logo, Acrobat, the Adobe PDF logo, Distiller and Reader are registered trademarks or trademarks of Adobe Systems Inc. in the U.S. and other countries.

For more DS SolidWorks copyright information, see **Help > About SolidWorks**.

### **Copyright Notices for SolidWorks Simulation Products**

Portions of this software © 2008 Solversoft Corporation.

PCGLSS © 1992-2010 Computational Applications and System Integration, Inc. All rights reserved.

### **Copyright Notices for SolidWorks Enterprise PDM Product**

Outside In® Viewer Technology, © 1992-2012 Oracle

© 2011, Microsoft Corporation. All rights reserved.

### **Copyright Notices for eDrawings Products**

Portions of this software © 2000-2012 Tech Soft 3D.

Portions of this software © 1995-1998 Jean-Loup Gailly and Mark Adler.

Portions of this software © 1998-2001 3Dconnexion.

Portions of this software © 1998-2012 Open Design Alliance. All rights reserved.

Portions of this software © 1995-2010 Spatial Corporation.

The eDrawings<sup>®</sup> for Windows<sup>®</sup> software is based in part on the work of the Independent JPEG Group.

Portions of eDrawings<sup>®</sup> for iPad<sup>®</sup> copyright © 1996-1999 Silicon Graphics Systems, Inc.

Portions of eDrawings<sup>®</sup> for iPad<sup>®</sup> copyright © 2003 – 2005 Apple Computer Inc.

# Introduction

---

This guide describes new and changed SolidWorks® Enterprise PDM capabilities in the 2013 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**

## Administration Tool

### **Delayed in State Notifications** ★

You can create notifications that are triggered when a file has been in a state for more than a specified length of time.

When you create a Delayed in State notification, you can also specify a resend value to create repeated notifications.

You can create a Delayed in State notification from:

- The Workflow Editor in the Administration tool
- The Notification Editor when you are logged in to a vault in Windows® Explorer

### **Creating Delayed in State Notifications from the Workflow Editor**

You can use the workflow editor in the Administration tool to create Delayed in State notifications for folders.

1. In the Administration tool, expand **Workflows** and double-click a workflow to open it in the workflow editor.
2. Click a state to open its State Properties dialog box.
3. On the Notifications tab, click **Add Folder Notification**.
4. In the Select Folder dialog box, select the folder for which you want to make the notification and click **OK**.
5. In the Folder Notification dialog box:
  - a) For **Type**, select **Delayed in State**.
  - b) For **Trigger after**, specify the number of days the folder can remain in the state before the notification is triggered.
  - c) For **Resend every**, specify a resend interval.
6. On the Recipients tab, click **Add Recipients**.

- In the Add recipients dialog box, select the users or groups to receive the notification and click **OK**.



You can type a substring in the **Filter** field to hide recipients whose names do not contain the substring.

- Click **OK** to complete the notification and close the State Properties dialog box.
- Click **Save**  to save the change to the workflow.

When the notification is triggered, the recipients you specified receive a message in their Inbox for each file in the folder that meets the delayed in state requirements. These notifications contain links to the files.

## Creating Delayed in State Notifications from Windows Explorer

You open the Notification Editor from Windows Explorer to create Delayed in State notifications for files.

- In Windows Explorer, log in to the vault.
- Click **Tools > Notify > My Notifications**.
- In the Notification Editor, click **Add File Notification**.
- In the Browse for File(s) dialog box, navigate to the location of the files for which you want to add the notification and click **Open**.
- In the File Notification dialog box:
  - For **Type**, select **Delayed in State**.
  - On the Notification Properties tab, select a **Workflow** and **State**.
  - For **Trigger after**, specify the number of days the file can remain in the state before the notification is triggered.
  - For **Resend every**, specify a resend interval.
  - Click **OK**.
- In the Notification Editor, click **OK**.

When the notification is triggered, you receive a message in your Inbox with a link to the document.

## Parallel Workflow Transitions

When you create or edit a workflow transition, you can select **Parallel** as the transition type. This requires multiple users to run the transition before a file is moved to a new state.

You create parallel transitions in the Workflow editor of the Administration tool. When you select **Parallel** as the transition type, a Role tab is added that lets you specify users and groups who can approve the transition and the number of approvals that is necessary to move a file to a new state.

If parallel transitions are in effect, when users right-click a file and select **Change State**, the number of transitions already approved by other users and the total number required to change the state of the file are shown.

In this example, **Editing required** is a parallel transition:



where:

- 0 shows the number of users who have already approved the transition.
- 2 shows the number of approvals needed to complete the state change.

If the state change has not yet taken place because the required number of approvals has not been reached, users who have already approved the transition can revoke their approvals. When the user selects **Change State**, the **Revoke** option is available.



## Creating a Parallel Transition

1. In the Administration tool, expand **Workflows** and double-click a workflow to open it in the Workflow editor.
2. Click a transition to open its Transition Properties dialog box.
3. For **Type**, select **Parallel**.  
A Roles tab is added to the dialog box.
4. On the Roles tab, click **Add Role**.



If roles have already been defined in the workflow, you can expand the **Add Role** button to choose from a list of existing roles.

5. In the Add Role dialog box:
  - a) Type a **Name** for the role.
  - b) In the **Required Users** field, specify how many users in the role must run the parallel transition before the file changes state.
  - c) Click **Add Member**.
6. In the Add Member dialog box:
  - a) Select the users or groups to add to the role.



You can type a substring in the **Filter** field to display only users or groups whose names contain the substring.

- b) Click **OK**.
7. Click **OK** again to close the Add Role dialog box.
  8. On the Permissions tab:
    - a) In the **Name** column, select the users and groups you added to the roles you created in steps 5 through 7.
    - b) In the left column, select **Permit**.

9. Optionally, add a notification to the transition.
 

The notification can be used to inform users who need to approve the parallel transition.

  - a) On the Notification tab, click **Add Folder Notification**.
  - b) Select the folder the notification applies to and click **OK**.
  - c) In the Folder Notification dialog box, on the Recipients tab, click **Add Recipients**.
  - d) In the Add recipients dialog box, select the users and groups to receive the notification and click **OK**.
  - e) Optionally, if you want to let users who run the parallel transition choose notification recipients, enable the **Dynamic** check box for the recipients.
10. Click **OK** to complete the transition and close the Transition Properties dialog box.
11. Click **Save** to save the change to the workflow.

## Changing State Via a Parallel Transition

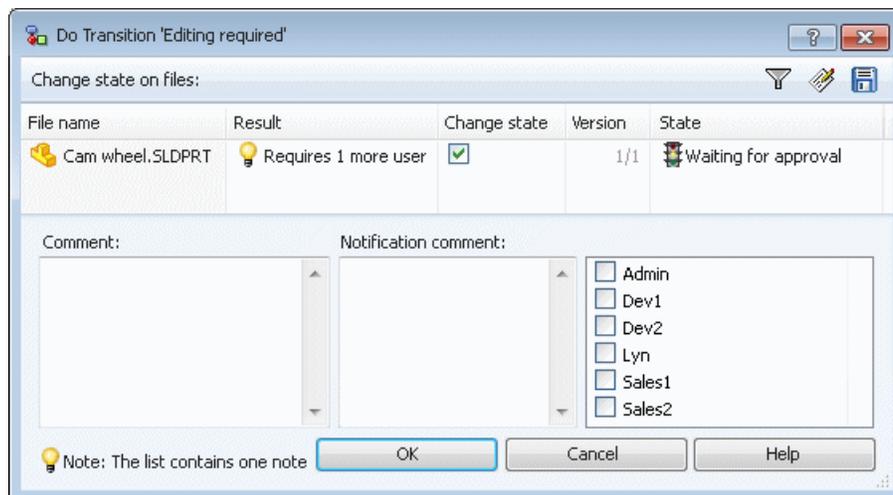
If a parallel transition has been created, multiple users must run the transition before the file actually changes state.

This procedure describes how two users send a file back to editing by using a parallel transition to change its state.

1. User A provides the first approval:
  - a) Log in to the vault.
  - b) Navigate to the file to be sent back to editing and select it.
  - c) Click **Modify > Change State > Editing required**.

The **Editing required** transition indicates the number of users who must run the transition.

When the Do Transition dialog box appears, the **Result** column indicates that after this transition is run, one more user must perform the transition before the state of the file is changed.



- d) Ensure that **Change state** is checked.
- e) Enter a **Comment**.

The comment appears in the file's history and in a **History** column that is added when the transition is run by other users.

- f) If dynamic notifications are enabled for the transition, enter a **Notification comment** and select the users to notify.
- g) Click **OK**.

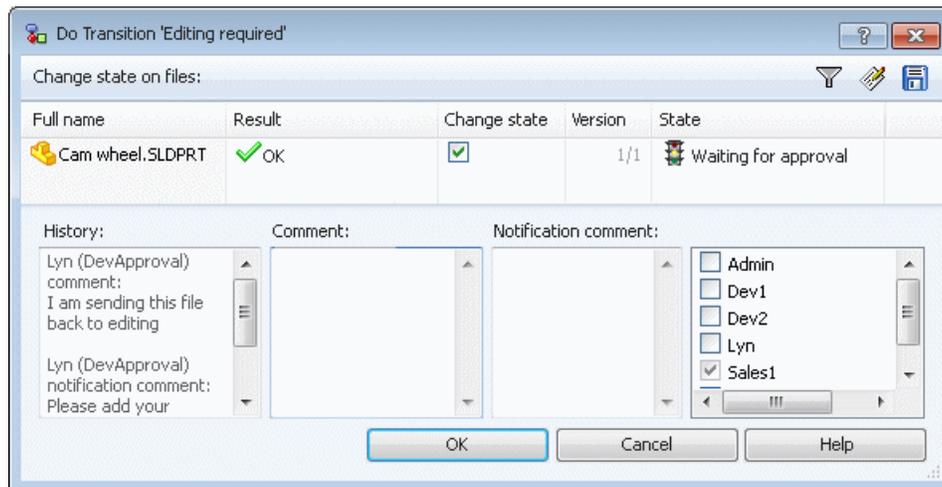
The **State** column in the file list shows that the file did not change state.

2. After being notified by User A that approval is needed, User B provides the second approval:
  - a) Log in to the vault.
  - b) Navigate to the file to be sent back to editing and select it.
  - c) Click **Modify > Change State > Editing required**.

The **Editing required** transition now indicates that one user has run the transition and that two users must run the transition to change the state of the file.

When the Do Transition dialog box appears, there are no notes in the **Results** column, since if User B approves the transition, the required number of approvals has been reached.

At the bottom of the dialog box, the **History** field shows the comments made by User A.

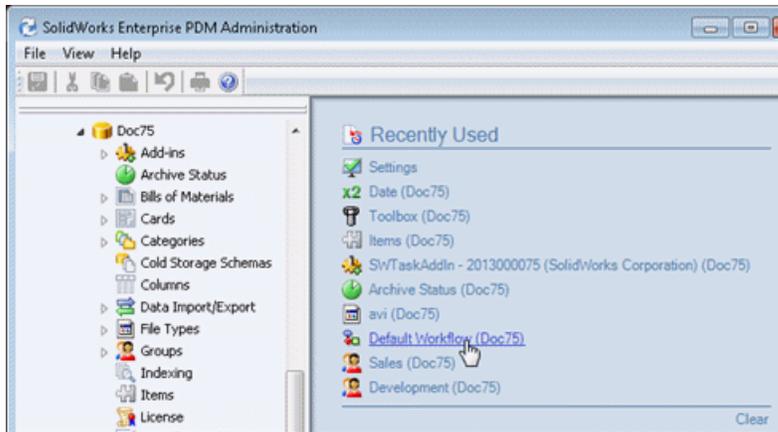


- d) Ensure that **Change state** is checked.
- e) Enter a **Comment**.
- f) If dynamic notifications are enabled for the transition, enter a **Notification comment** and select the users to notify.
- g) Click **OK**.

The **State** column in the file list now shows that the file has changed state.

## Recently Used List

The **Recently Used** list appears in the right pane of the SolidWorks Enterprise PDM Administration tool. It provides quick access to the last ten administration features you have used.



The **Recently Used** list is retained when you close the Administration tool. When you reopen the tool, you can see the history of the work you did in your previous session.

Click **Clear** to remove all of the items that are currently in the list.

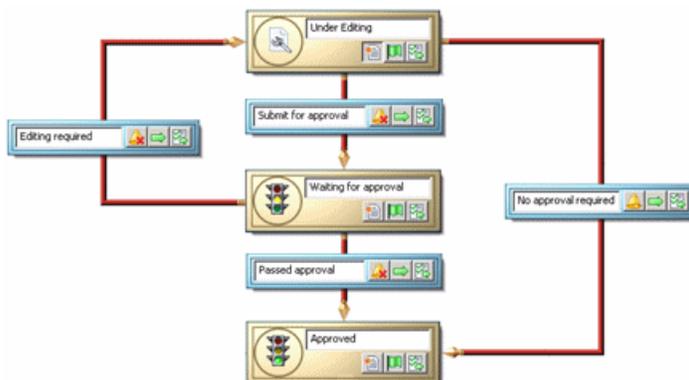
The Card Editor also contains a **Recently Used** list showing the cards you have most recently edited.

## Workflow Editor Update ★

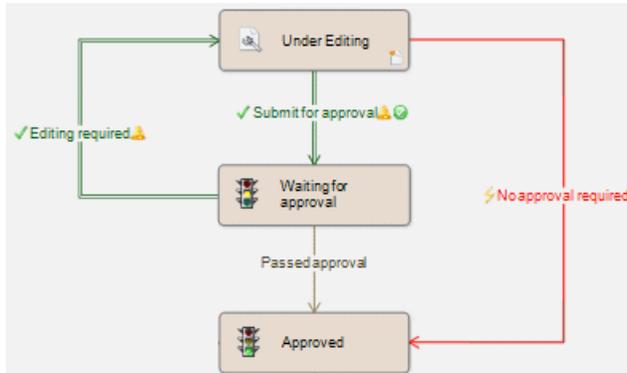
The Workflow Editor user interface has been updated to make it easier to navigate large workflows.

The appearance and layout of workflow state and transition objects has been simplified.

Workflow Editor in Enterprise PDM 2012



Workflow Editor in Enterprise PDM 2013



## Zoom Controls

New controls on the toolbar make it easier to work in complex work flows. You can zoom out to see the entire workflow graph or zoom in to modify specific sections.

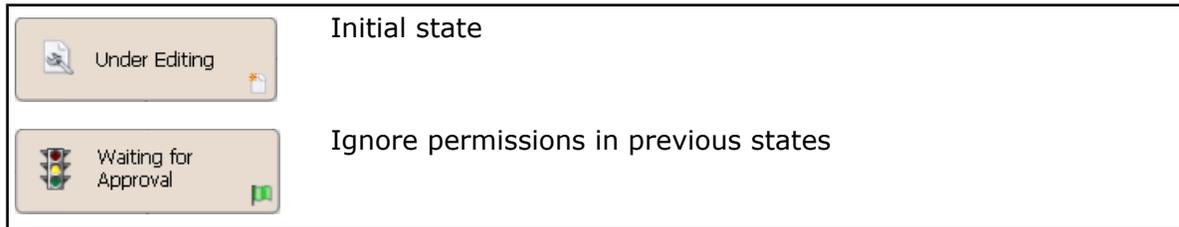
	<b>Zoom to Area</b>	Zooms to an area of the workflow that you select.
	<b>Zoom In\Out</b>	Zooms in and out when you hold down the left mouse button and drag the mouse up or down. You can also zoom by using the mouse wheel.
	<b>Zoom to Fit</b>	Displays the entire workflow in the available space.
	<b>Actual Size</b>	Displays the workflow at its original (100%) size.

## User Interface Simplification

The appearance of transition objects has been simplified. A combination of color and icons make it easier to distinguish between transition types and identify transition settings.

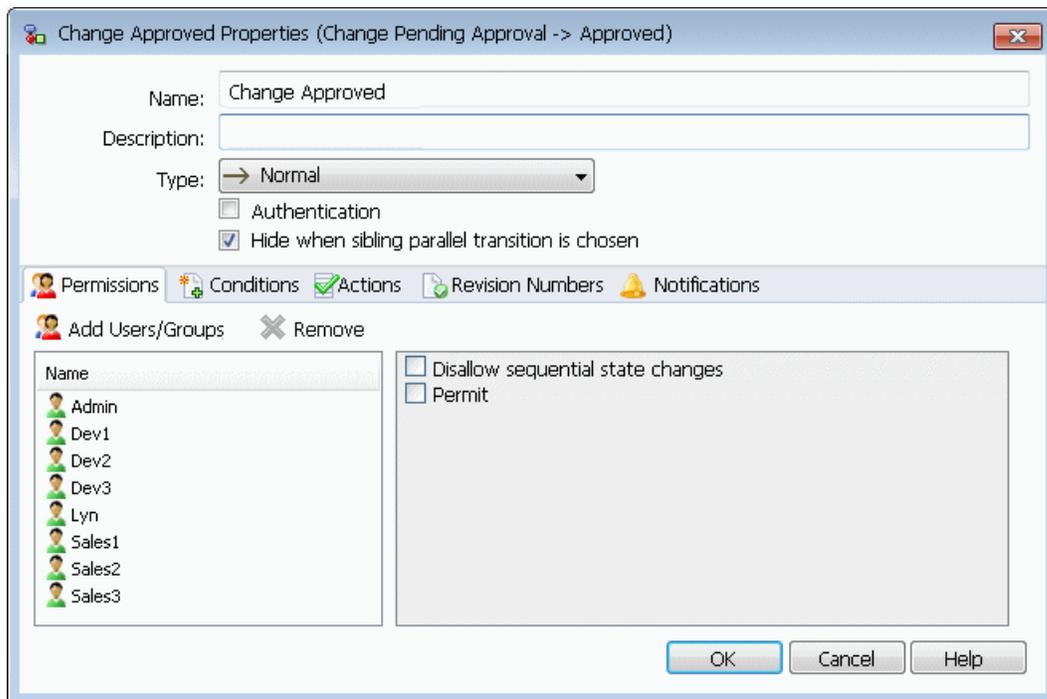
	Normal transition	Users run the transition to change file states.
	Automatic transition	All files in the source state automatically pass through the transition.
	Parallel transition (new feature)	A specified number of users must promote a file through a transition before the file's state changes.
	Normal transition with notifications set	
	Normal transition with authentication set	

State objects have also been simplified. Icons in the lower right corner are now used to identify state object properties rather than to initiate changes. For example:



## New Properties Dialog Boxes

To open both state and transition properties dialog boxes, you click the objects in the workflow map.



Tabs have been added to the dialog boxes to provide easier and more consistent access to all settings.

Both the state and transition properties dialog boxes include:

- A Permissions tab, which replaces the permissions task pane from previous versions of Enterprise PDM.
- A Notifications tab, which provides access to the Folder Notification dialog box of the redesigned Notifications Editor.
- A Revision Numbers tab, which replaces the **Increment Revision Command** section of the state properties dialog box and the **Change revision counters** option of the transition properties dialog box.

Transition properties dialog boxes also include Conditions and Actions tabs.

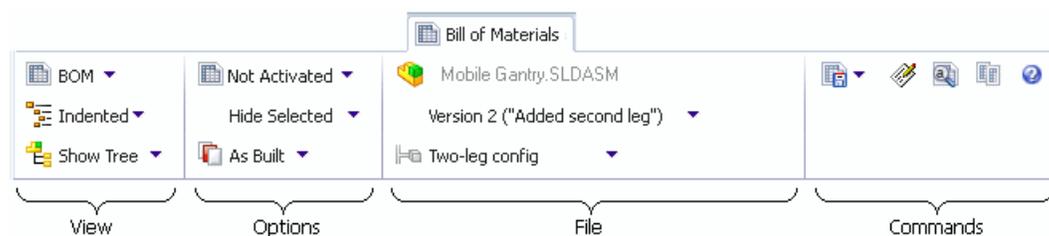
## File Explorer and SolidWorks Add-in

### Bill of Materials Tab Improvements

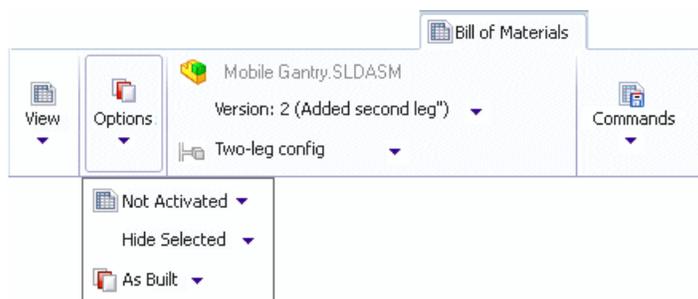
The toolbar area of the Bill of Materials tab in Windows Explorer has been updated. The controls are easier to use and occupy less screen space. Bill of Materials functionality remains the same.

### BOM Toolbar Reorganization

Existing controls have been rearranged into four sections.



If you make the window too narrow for all the controls to be shown, as many sections of the tab as necessary are compacted into flyout buttons. Clicking any of these buttons displays the controls for that section.



### BOM Comparison

The new Bill of Materials UI makes it easier to compare BOMs. Instead of displaying a dialog box, when you click **Compare** , the sections of the BOM UI are reordered.

The screenshot shows the Bill of Materials comparison UI. Two BOMs are displayed side-by-side for comparison. The comparison table below shows the following data:

File Name	Configuration	Part Number	Qty	State
Magnet.SLDPRT	Type B	Magnet	1	Under Editing
Membrane.SLDPRT	Type B [ Type A ]	Membrane	1	Under Editing
OuterRing.SLDPRT	Type A	OuterRing	2	Under Editing
Speaker Frame.SLDPRT	Square Cutout Glueable ...	Speaker Frame	1	Under Editing

The left section shows the BOM, version, and configuration that are the source of the comparison. The middle section lets you choose the BOM, version, and configuration to compare. In the commands section on the right, the **Comparison** button becomes a **Close comparison** button.

## Close SolidWorks Files on Check In

When you edit files and check them in from SolidWorks, you can select to have Enterprise PDM close the files after the check in operation completes, rather than reload them.

This can improve performance since reloading the files can be time consuming.

To have files closed after you check them in from the SolidWorks Enterprise PDM add-in:

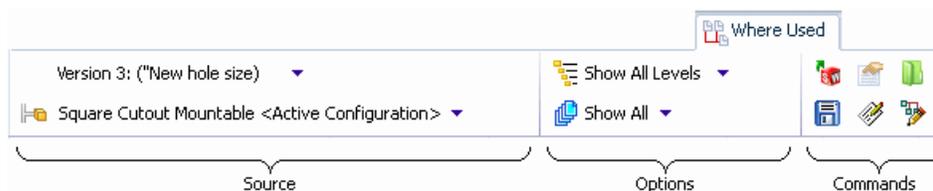
1. In the SolidWorks Enterprise PDM task pane, right-click the file, and click **Check In**.
2. In the Check in dialog box, in the toolbar, expand the **Reload Files after Check In** command and click **Close Files after Check In**.
3. Complete your check in selections and click **Check in**.

The files are checked in and closed in SolidWorks.

## Contains and Where Used Tab Improvements

The toolbar areas of the Contains and Where Used tabs in Windows Explorer have been updated to make the controls easier to use and occupy less screen space.

Existing controls on both tabs have been rearranged into three sections.



- The source section lets you select the version and configuration of the file to view.
- The options section controls how the results are displayed.
- The commands section contains action buttons.

If you shrink the size of the window, the sections are compacted into flyout buttons. Clicking any of these buttons displays the controls for that section.

The commands section buttons include three new buttons that are active when you select a file from the list at the bottom of the tab.

	<b>Open</b>	Opens the file selected in the tree in the associated application.
	<b>Properties</b>	Shows the property dialog box for the file selected in the tree.
	<b>Browse to</b>	Opens a new Explorer window and browses to the file selected in the tree.

## Full Row Selection Highlighting in Windows Explorer

When a user selects a file in Windows Explorer or the Search Tool (including integrated Search), the entire row is highlighted, making it easier to read the column data associated with the file.

In previous releases, only the file name was highlighted.

## Notification Editor Update

The Notification Editor user interface has been updated to make it easier to create and modify notifications.

New File Notification and Folder Notification dialog boxes help you select notification types and specify notification options.

Administrators creating notifications for workflow transitions also use the Folder Notifications dialog box to add notifications to states and transitions.

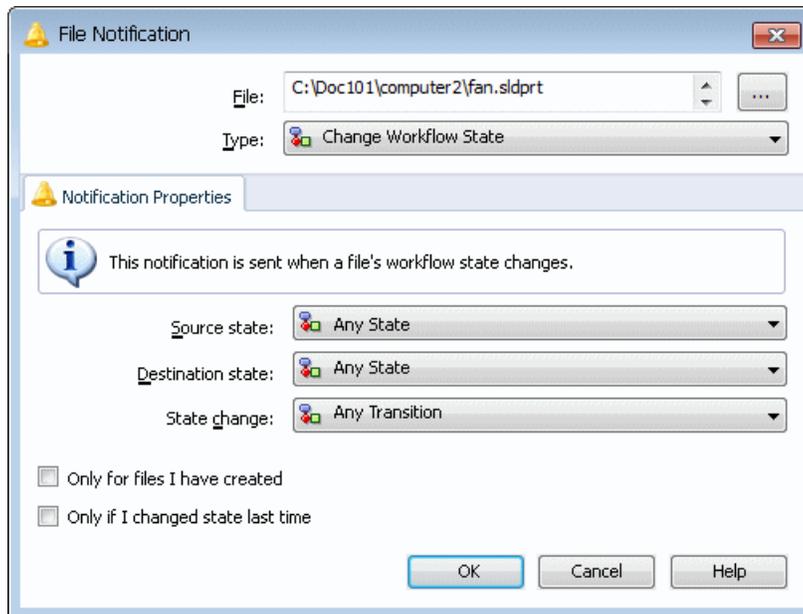
## Creating File Notifications in Windows Explorer

To create file notifications, you must work from Windows Explorer.

To create file notifications without opening the Notification Editor:

1. Select the files for which you want to create notifications.
2. Right-click and click **Notify > Me when**.

The File Notification dialog box appears.



3. For **Type**, select the type of notification to create.  
The tab displays the controls that are appropriate to the notification type and an informational message describing the notification's effect.

4. Set the other controls and click **OK**.  
The Notification Editor appears, listing a separate notification for each of the files you selected.
5. Click **OK**.

## Creating Folder Notifications from the Workflow Editor

Administrators can access the Folder Notification dialog box when they are editing workflow state or transition properties in the administration tool.

To create a notification for a workflow transition:

1. In the Workflow Editor, click a transition to open its Properties dialog box.
2. On the Notifications tab, click **Add Folder Notification**.
3. In the Select Folder dialog box, select the folder for which to create the notification and click **OK**.  
The Folder Notification dialog box appears.  
For transition notifications, the **Type**, **Source state**, **Destination state**, and **State change** fields are read only. The transition you are editing dictates these properties.  
For state notifications, you can edit these fields.
4. If appropriate, select one or both of the following to restrict who the notification is sent to:
  - **Only to the file creator**
  - **Only to the last state modifier**
5. On the Recipients tab, click **Add Recipients**.
6. In the Add Recipients dialog box:
  - a) Select the users and groups to receive the notification.  
If you select an entire group, the members of that group are automatically selected.
    -  Type a string in the **Filter** field to display only users and groups whose names include the string.
  - b) Click **OK**.
7. In the Folder Notification dialog box, to allow specific users who run this transition to choose notification recipients, select the users and check the box under **Dynamic Selection**.
  -  The **Dynamic Selection** option is not available for folder notifications you create from the State Properties dialog box.
8. Click **OK** twice.
9. Click **Save**  to save the change to the workflow.

## Viewing Your Notifications

In Windows Explorer, you can view the notifications you have created by opening the Notification Editor. You can remove notifications you no longer use, edit existing notifications, or add new folder and file notifications.

1. Right-click a vault file and click **Notify > My Notifications**.  
The Notification Editor appears.



 indicates notifications you have created.

 indicates notifications created by an administrator using the Workflow Editor.

2. To activate a notification, check its box under **Activated**.
3. To add a notification, click **Add Folder Notification** or **Add File Notification**.
4. To remove or edit a notification you have created, select it and click the appropriate control.



You cannot remove or edit notifications created by an administrator. If you select a notification identified with the  icon, the **Remove Notification** control remains inactive. The **Edit Notification** control changes to **View Notification**. Use it to view notification details.

## Quantity Specification for Manually Created File References

When you create file references manually by using the **Paste as Reference** command, you can specify a quantity for the referenced files, which is then displayed in the Bill of Materials of the file.

If you check out the file, you can modify the quantity by using the **Edit User Defined File References** command. Your change affects future versions of the file but not existing versions.

To specify a quantity for a referenced file when you create the reference:

1. Right-click the file to be referenced and click **Copy**.
2. Check out the file to contain the reference, right-click it, and click **Paste as Reference**.
3. In the Create File References dialog box, specify a value in the **Quantity** column, and click **OK**.
4. Check in the file with the reference.

When you view the file containing the reference in the Bill of Materials tab, the quantity is displayed.

To modify the quantity of a referenced file:

1. Check out the file containing the reference.

2. With the file selected, click the Contains tab.
3. Click **Edit User Defined References** .
4. In the Edit User-Defined References dialog box, modify the value in the **Quantity** column, and click **OK**.

## User Information Pop-up

When you mouse over a user name in the SolidWorks Enterprise PDM user interface, a pop-up window appears. This window provides user details and links to help you communicate with other users in your company.

You can display the user window by hovering over the user name in the **Checked Out By** column in:

- Vault file lists in Windows Explorer, including the Contains and Where Used tabs
- The Enterprise PDM task pane in SolidWorks
- Dialog boxes such as Check in, Check out, and Get

In the History dialog box, you can display the user window by mousing over the **User** column or **User** field for a selected event.

The user window that appears contains links to the Enterprise PDM email editor, as well as Microsoft® Office Communicator or Microsoft Lync®, and Microsoft-enabled Voice over IP (VoIP) if you have these products installed. Other details users add to their profiles, such as an image, phone numbers, Web links, and presence statements, are also available.

## Adding Information to the User Pop-up

If you have permission to administrate users, you can add information to user profiles that will be displayed on the user pop-up window.

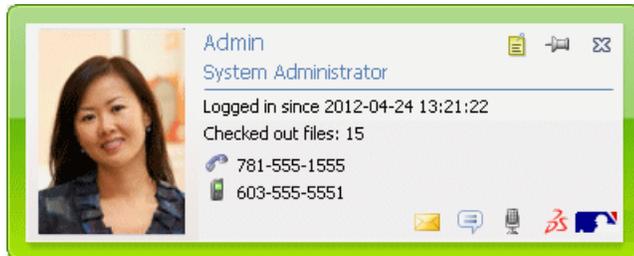
1. Open the Administration tool.
2. Expand **Users** and double-click the name of the user whose profile you want to modify.
3. In the right pane of the user's Properties dialog box:
  - a) To display phone numbers in the user window, complete the **Phone** and **Cellphone** fields.
  - b) To add links to Web sites, type URLs in the Website **Address** fields.  
You can add up to four web addresses.  
The **Tooltip** field is completed automatically.
  - c) To add a note, type text in the **Presence note** field.
4. To add an image:
  - a) In the left pane, click **Browse for Picture** .
  - b) Navigate to the location of the image and click **Open**.
5. Click **OK**.

## Viewing a User Pop-up Window

User pop-up windows are visible in Windows Explorer and SolidWorks views of an Enterprise PDM vault.

To view user pop-ups in Windows Explorer:

1. Navigate to an Enterprise PDM vault that has files checked out.
2. Mouse over a user name in the **Checked Out By** column.  
A window appears that contains information about the user who checked out the file.



Depending on how much information has been added to the user's properties and how your network is configured, the following information that is specific to the user is provided on the card:

	User's login name and full name
	Date and time the user logged in
	Number of files the user has checked out
	Note from user
	User's work phone number
	User's cell phone number
	Sends user email
	Sends user a Microsoft Office Communicator or Microsoft Lync message
	Initiates communication with a user using Microsoft-enabled Voice over IP (VoIP)
	Web sites included in user's properties

3. To pin the card so it remains displayed, click .
4. To close a pinned card, click .

## Version Free Variables

You can update variables for a file without having to check the file out and increment the version of the file when you check it back in.

This lets you update variables that change over time, such as cost, while the file itself may not change.

Additionally, you can change the variable even if the file is in a state where you do not have permission to check it out.



A new version of a file is created if you update version free variables for a checked out file or if a version free variable is modified by a workflow transition action.

To use a workflow transition to update version free variable data without versioning the file, create a Dispatch script set to run after the transition to the destination state.

## Enabling Update of Version Free Variables

Administrators with permission to update variables and administrate users use the Administration tool to enable users to update variables without creating new versions of files.

1. To add the version free capability to a variable:
  - a) In the Administration tool, expand **Variables** and double-click the variable.
  - b) In the Edit Variable dialog box, click **Version free**.
  - c) Under **Update versions**, do one of the following:
    - Select **All Versions** to make the variable update affect all versions and revisions of the file.
    - Select **Latest Version** to make the update affect only the latest version of the file.
  - d) Click **OK**.
2. To give a user permission to update version free variables:
  - a) Expand **Users** and double-click the user.
  - b) In the user's Properties dialog box, click **Folder Permissions**.
  - c) On the Permissions per Folder tab, select a folder.
 

To assign the permission for the entire vault, select the vault.
  - d) Under **Folder Permissions**, click **Edit version free variable data**.
  - e) Click **State Permissions**.
  - f) Select a **Workflow** and **Workflow state**.
  - g) Under **Permissions**, click **Edit version free variable data**.
  - h) Click **OK**.

## Updating Version Free Variables

Users with permissions to edit version free variable data can modify version free variable data on a file's data card or by updating the file data cards for a folder.

1. To modify a version free variable for a data card:
  - a) Without checking it out, select a file and click the Data Card tab.
 

In the data card, fields that contain version free variables are editable. All other fields are disabled.
  - b) Modify the editable variables and click .
2. To modify a version free variable for a folder and propagate the value to the files in the folder:
  - a) Select the folder and click the Data Card tab.
  - b) On the Edit Values tab, modify the version free variable and click .
  - c) Click **Modify > Update > Values in Files**.

- d) In step 1 of the Updating File Data Cards wizard, click **Version free variables** and click **Next**.
- e) Complete steps 2 and 3.
- f) In step 4, in the variable list, under **Update**, select the version free variable and click **Next**.
- g) Complete steps 5 and 6.
- h) When the update is confirmed, click **OK**.

## Windows Explorer Favorites Links

When you create a new local vault view, Enterprise PDM places a link to the vault view in the **Favorites** list at the top of the Windows Explorer navigation pane.

This makes it easy to open the local vault view even if it is located in a subdirectory.

