



WHAT'S NEW SOLIDWORKS PDM 2023





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SOLIDWORKS PDM

Topics:

- Managing Deleted Users
- Configuring Transition Actions
- Adding Tooltips to the Data Card Controls
- Automatic login to the Administration Tool
- Data Card Controls (2023 SP2)
- Performance Improvements for File Version Upgrade Tool
- Logging File Retrieval Operations
- Support for Microsoft Edge WebView2-Based Controls
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- Display Groups for Inherited Permissions
- Notification Templates
- Synchronizing Users with Windows Active Directory (2023 SP1)
- Days in State Variable (2023 SP1)
- Archive Workflow States (2023 SP2)
- Grid View in Web2 (2023 SP2)
- Administrative Permissions for Tasks (2023 SP2)
- SOLIDWORKS PDM Performance Improvements (2023 SP04)
- Other SOLIDWORKS PDM Enhancements

SOLIDWORKS[®] PDM is offered in two versions. SOLIDWORKS PDM Standard is included with SOLIDWORKS Professional and SOLIDWORKS Premium, and is available as a separately purchased license for non-SOLIDWORKS users. It offers standard data management capabilities for a small number of users.

SOLIDWORKS PDM Professional is a full-featured data management solution for a small and large number of users, and is available as a separately purchased license.

SOLIDWORKS PDM



Managing Deleted Users

7					_	
Name 8 Carla 8 John 8 Mary 8 Richard	Full Name Carla Coe John Doe Mary Major Richard Miles	Initials CC JD MM RM	ID 7 8 9 10	Restore login	Warning	em Doen
				>	Serial Nu SOLIDWi Tasks Template Users an B Grou B Users	New User Settings Permission Assignments Export History Validate Logins Deleted users

You can use the Administration tool to restore deleted users and to refuse login to users.

You must have **Can administrate users** administrative permission.

To restore a deleted user, expand **Users and Groups Management**, right-click **Users**, and select **Deleted users**. In the Deleted Users dialog box, select the user in the **Restore login** column.

To refuse login to a user, expand **Users and Groups Management**, right-click **Users**, and select **Open**. In the Users dialog box, select a user in the **Refuse login** column.

Deleted Users Dialog Box

Use the Deleted Users dialog box to restore the login for deleted users.

To display this dialog box:

Expand Users and Groups Management, right-click Users, and select Deleted users.

Name Name the user enters in the login dialog box.

Full Name	The user's full name. The default is the user's login name.
Initials	The user's initials. The default is the first letter of the user's login name.
ID	ID that is unique for each user.
Restore login	When selected, restores the login of the selected user.
Warning	Displays a warning message if the login name you are attempting to restore is already active.

To save changes, click **Save** or close the dialog box and click **Yes** when prompted to save changes.

Configuring Transition Actions

		User Data
Date		User Data2
Dest. State		User Data3
Filename		Work Phone
Filename without e	xtension	Home Phone
Folderpath		Mobile Phone
Next Revision		Company
Next Version		Department
Revision		Job Title
Source State		Office
Time		Address
Transition Commer	nt	Zip Code
Version		City
Version Comment		State
User	•	Country
Variable	•	

The variable list in the Transition Action dialog box includes the user properties fields that were introduced in SOLIDWORKS PDM 2022.

These fields are:

- First name
- Last name
- Middle name
- Prefix
- Suffix
- E-mail
- E-mail2

- E-mail3
- User Data
- User Data2
- User Data3
- Work phone
- Home phone
- Cellphone
- Company
- Department
- Job title
- Office
- Address
- Zipcode
- City
- State
- Country

These are available under the **User** list and administrators can use these fields in the following transition actions:

- Import data from XML
- Inc. Revision
- Send Mail
- Set Variable

Adding Tooltips to the Data Card Controls

Edit-t	pox properties	
Value		
Variable name:		
🐼 BOM Quantity		\sim
	Variables	
Tooltip		
Title		
Body		
		~
		× .
Validation		
(Decimal value range)		

In the Card Editor, you can add tooltips to the data card controls.

In the **Tooltip** pane, enter the **Title** and **Body** of the tooltip.

You cannot specify tooltips for tab and frame controls.

In SOLIDWORKS PDM File Explorer, when you hover over the corresponding data card control, the tooltip displays.

Automatic login to the Administration Tool

Administration Login Vault: Doc_Vault Use automatic login for this vault Cubername: Password:
O Login as the currently logged in user in Windows.

You can configure SOLIDWORKS PDM to log you in to the Administration tool using a specific name or the name of the current Microsoft[®] Windows[®] profile.

In the Administration tool, under **Local Settings**, double-click **Settings** or right-click **Settings** and click **Open**.

In the dialog box, under **Administration Login**, select a **Vault** and **Use automatic login for this vault**. You can specify:

- Login as the following user. Logs you in using the specified user name and password.
- Log in as the currently logged in user in Windows. Logs you in using the user name and password of the current Microsoft Windows profile. (Available only for vaults that are configured to use a Microsoft Windows login.)

Data Card Controls (2023 SP2)



You can apply control logic in data cards more easily.

In addition to the **Control** menu, you can also access the **Control Logic** command when you:

- Click ⅔ in the Controls toolbar.
- Click **Control Logic** in the properties pane.

Not available for card search control and variable search control.

When adding control logic, you have more flexibility in selecting the behavior of a control. In the Control Logic dialog box, the **Hide - Clear value** and **Hide - Retain value** options let you specify whether the hide action in the control logic clears or retains the value. Previously, only the **Grey out** and **Hide** options were available.

Control Logic			?	×
Actions that should update	this control:			
Variable	Comparison	Value		
-				~
Grey out Hide - Clean Hide - Retai	rvalue n value			

In the Controls toolbar, if you select **Show Controls with Control Logic**, an indicator appears in the top-left corner of the controls that have control logic applied.

You can also configure the **Find User** command type for a button control to return more user properties. Previously, only **Login name** was available as the user value to populate the **Destination variable** for the **Find User** list.

Command type:	
Find User	~
Dialog box caption:	
Destination variable:	
SenderName	~
User Value:	
Full name	~
Permit multiple selection	

Performance Improvements for File Version Upgrade Tool

You can upgrade SOLIDWORKS files in a SOLIDWORKS PDM vault faster.

If you are upgrading assembly files and you select **Overwrite** and **Latest Version** in the Version Settings page, the software skips upgrading and uploading references that are not the latest in the assembly's as-built version. This improves the performance of the upgrade process.

Logging File Retrieval Operations

2	× 🔍	Search te	xt:		
уре	Date	Description	Destination Machine	Destination IP Address	User
Information	2022-03-04 10:30:10	Get via PDM Client	CSIWUBARUP	10.85.68.87	Admin
Information	2022-03-04 10:37:30	Get via PDM Client	CSIW3064PUP	110-005-040-07	Admin
Information	2022-03-04 11:00:17	Get via PDM Client	CSIW3064PUP	333-885-683-877	Admin
Information	2022-03-04 11:24:12	Get via PDM Client	CSIW3064PUP	333-855-643-877	Admin
Information	2022-03-04 11:25:27	Get via PDM Client	CSIW1064PLP	333.855.643.877	Admin
Information	2022-03-04 11:28:55	Get via PDM Client	CSIW1064PUP	333.055.643.07	Admin
Information	2022-03-04 11:29:36	Get via COM API	CS/W1064PUP	Local	Admin

You can maintain a server-side log of files retrieved for a vault. (SOLIDWORKS PDM Professional only.)

To enable logging, in the Administration tool, right-click a vault and select **Properties**. In the File Vault Properties dialog box, under **Logging operations**, select **Get**. This enables logging of the **Get** operation for the vault on all archive servers.

You must have File vault management administrative permission.

To view the file retrieval log, in the Administration tool, right-click a vault, and select **Show the Get Log**. The Log File dialog box displays log information for each file in the vault that is downloaded from the archive server to the local view of a client machine, Web2 server, or Web API server.

Log File - Get Operations Dialog Box

The Get Operations dialog box lets you view informational and error events for the files retrieved for a vault on all archive servers.

To display the log file:

In the Administration tool, right-click a vault, and select **Show the Get Log**.

Туре	Event type: error, informational, or warning.			
Date	Date and time of the event.			
Description	 Method used to invoke the Get operation: Desktop client COM API Web API Web2 server 			
Destination Machine	Name of the destination machine that receives data from the archive server.			
Client IP Address	IP address of the client machine			
	For file retrieval operations through Web2 or Web API servers, the IP address of the server machine is logged.			
User	Login name of the user who performed the Get operation.			
Document ID	ID of the document			
Document Name	Name of the document			
Version	Version of the document			
Document Path	Path of the document in the vault			
Archive Server	Name of the archive server on which the event occurred.			

Support for Microsoft Edge WebView2-Based Controls

In SOLIDWORKS PDM, the Internet Explorer-based controls are replaced with WebView2-based controls.

This applies for:

- Preview pane in SOLIDWORKS PDM File Explorer. You can preview the HTML documents that are present in the vault.
- EXALEAD OnePart Search view
- Web Card Configuration Editor dialog box

You must have the WebView2 runtime installed on your machine.

Removing Computers from the Task Execution List

🗟 New Task - Properties	
New Task	A task can be executed on one or more machines. Only computers marked with a che the list below will be considered.
Add-in • <u>Execution Method</u> Menu Command Societ	 Let the system choose the computers to execute the task Prompt the user to choose a computer when the task is initiated Execute on the computer where the task is initiated
Script Permissions Success Notification Error Notification	Computers supporting the task:

You can remove computers from the list of hosts that support task execution.

In the Administration tool, open the task's Properties dialog box. In the left pane, click **Execution Method**. In the **Computers supporting the task** list, right-click a computer, and select one of the following:

- **Remove from** *Add-in Name*. This removes the computer as a supported host for all tasks that use the same add-in.
- **Remove from All Add-ins**. This removes the computer as a supported host for all task add-ins.

A confirmation message lists all the affected tasks.

The Task History dialog box displays a list of computers that are removed for that task.

Display Groups for Inherited Permissions

pe - Properties		?
Carda Coe	Administrative permissions: Can accept tasks to execute on a host Can administrate add-ins Can administrate templates Can administrate Can delete labels Can purge history Can administrate	×
roperties	Can administrate users Can undo check o Can undo check o Purchase Management Can update cold s Quality Assurance Can update colum Can update docur	
<u>ative Permissions</u> missions Permissions ns per File	Can update ERP I Can update histor Can update index Can update item s Can update licens Can update licens Can update lists	

In the Administration tool, in the user Properties pages, you can hover over the group icon of a permission to view the groups from which the permission is granted to the user.

A pop-up dialog box appears that lists these groups.

Notification Templates

Customize Notification	×	
Name: Document added	Preview	
Template:		
O Default Custom		
Subject: Document '%filename%' has been added	>	
Body:		
<html> <style></style></html>		

SOLIDWORKS PDM lets administrators customize the templates for automatic notifications for a vault. This helps to display information that is more relevant to the user.

- You must have **Can update mail configuration** administrative permission.
- You can customize notifications only for files and not for items and Bills of Material (BOMs).

You can customize notification templates for the following file operations:

- Added
- Changed State
- Checked In
- Checked Out
- Delayed in State



You can edit the subject and body of the template in HTML format and also use variables in the notification message.

You can also export notification templates. To export:

- All notification templates. Right-click the **Notification Templates** node and select **Export**.
- File notification templates. Expand Notification Templates, right-click File Notifications, and select Export.
- The notification template for a file operation. Expand **Notification Templates** > **File Notifications**, right-click a file operation, and select **Export**.

Customize Notification Dialog Box

This dialog box lets you customize the templates for automatic notifications for a vault.

To access this dialog box, do one of the following:

- Expand Notification Templates > File Notifications, right-click a subnode, and select Open.
- Expand **Notification Templates** > **File Notifications**, and double-click a subnode.

Name	Displays the name of the notification template. This field is read-only.
Preview	Displays how the template appears to users.
Template	Lets you select either of the notification templates:
	DefaultCustom
	If you select Custom , the fields listed below in the table are enabled. This lets you customize the notification template.
Subject	Displays the notification subject. You can edit the notification
	subject for custom notifications. To include variables, click \geq and select a variable.
Body	Displays the notification body. You can edit the notification
	body for custom notifications. To include variables, click \ge and select a variable.
Load from File	Imports HTML text into the body of the notification.
Reset	Resets the notification template to the default template.

Synchronizing Users with Windows Active Directory (2023 SP1)

Active Directory Sync Settings	×
Groups	
Update groups:	
Add users	
Add users not found on the archive server	
Copy permissions and settings for new users from:	
None 🗸	
Remove users from group	
Update users	
Users	
Add users	
Add to groups	
Copy permissions and settings from:	
None	

You can synchronize users and groups in a vault with Windows[®] Active Directory as an on-demand operation.

You must have **Can administrate users** administrative permission.

You can define preferences for sync in the Active Directory Sync Settings dialog box. To access this dialog box, right-click the **Users and Groups Management** node and select **Active Directory Sync** > **Settings**.

To perform Active Directory sync, right-click the **Users and Groups Management** node and select **Active Directory Sync** > **Run Sync**.

The **Update from Active Directory** command is now also available for Windows users in a vault. Previously, it was available only for Windows groups in a vault.

Active Directory Sync Settings Dialog Box

Use the Active Directory Sync Settings dialog box to define preferences for on-demand sync of users and groups in a vault with Windows Active Directory.

To access this dialog box:

Right-click the Users and Groups Management node and select Active Directory Sync > Settings.

Groups

Remove Groups	Removes Windows grou no longer exist in Active	ps from SOLIDWORKS PDM vault that Directory.
Update Groups		
Add users	Adds existing users or c the group membership	reates new users in the vault based on in the Active Directory group.
	Add users not found on the archive server	Creates new users in a vault even if they are not found on the archive server.
	Copy permissions and settings from	For new users, copies permissions and settings from the selected user.
Remove users from group	Removes Windows user who are no longer mem	s from the SOLIDWORKS PDM group bers of the Active Directory group.
Update users	Updates Windows user properties for existing members of a Windows users group with the attributes of the user account in Active Directory.	

Users

Add users	Adds new Windows users that exist in users and groups defined in the Windows login settings on the archive server but not in the vault.		
	Copy permissions and settings from	For new users, copies permissions and settings from the selected user.	
Remove users Removes Windows		ers from the vault if they no longer exist settings on the archive server.	
	Delete	Deletes the user from the SOLIDWORKS PDM vault.	
	Refuse login	Specifies the Refuse Login option in the Administrative permissions page of user properties.	
Update users	Updates user properties for existing Windows users with the attributes of the user account in the Active Directory.		

Days in State Variable (2023 SP1)

In the Customizable Columns dialog box, for a column, you can select **Days in State** as **Variable**.

This system variable is available for the following column set types:

- File List
- Quick Search Result
- Search Result

Archive Workflow States (2023 SP2)



You can archive a workflow state that is not connected to any transition. This lets you see a workflow without any obsolete states in the view. Administrators can view archived states and unarchive them.

You cannot archive states that are connected to other states.

On the Workflow toolbar, click 🗐 to display the Workflow State Archive pane. In this pane, you can view all the archived states. You can also sort the list alphabetically.

To archive a workflow state:

- Right-click the state and select **Archive**.
- Drag the state to the Workflow State Archive pane.

To unarchive a workflow state:

- In the Workflow State Archive pane, right-click the state and select **Unarchive**.
- Drag the state from the Workflow State Archive pane to the workflow.

Grid View in Web2 (2023 SP2)

Bevel Gears	Q + 🏮 🔣 🔺
	* *
Base.SLDPRT	Bevel Gears.avi
Under Editing (Odays) 🧹 1 / 1	Under Editing (0 days)
	Data Card

In the Web2 client, you can see a grid view of thumbnail previews in file lists and search results.

The grid view layout is available in the following pages of large screen and small screen layouts:

- File or folder list
- Search results

To switch the layout from the list view to the grid view:

- In the large screen layout, click and select Grid View. In this view, you can click
 and select a direction and parameter to sort the list.
- In the small screen layout, touch the ellipsis, expand **List View**, and then select **Grid View**. To sort the list, expand **Sort By** and select a direction and parameter.

The Select All and Deselect All options are available in the grid view layout.

To view more information for a file, you can access the File View tabs through the quick links menu. To access this menu in:

List view	Hover over a row and click \checkmark or right-click the file.
Grid view	Click \checkmark or right-click the file.

The quick links menu is available only in:

- File or folder lists
- File details view
- Search results

Administrative Permissions for Tasks (2023 SP2)

Administrative permissions for tasks are redefined.

Permission	Description
Can view task lists	View the task list and perform all the actions that are available in the Task List dialog box.
Can update task settings	Create and modify tasks.

SOLIDWORKS PDM Performance Improvements (2023 SP04)

SOLIDWORKS PDM 2023 makes significant performance improvements in the presence of high latency to SOLIDWORKS PDM servers.

The improvements might vary depending on the amount of latency, size of datasets, and operations.

- The following operations perform better when latency to the database server is high:
 - Check-in
 - Check-in with automatic transition
 - Undo Check-out
 - Interactive operations such as menus, shortcut menus, reference dialog boxes, SOLIDWORKS PDM File Explorer tabs
- The following operations perform better when latency to the archive server is high:
 - Add files
 - Change state on file modifications
 - Get files
 - Get latest version of files

In SOLIDWORKS PDM 2023 SP04, the mechanism for loading of SOLIDWORKS PDM and custom add-ins is reworked. As a result, operations such as logging in to a vault and starting the SOLIDWORKS PDM Search tool perform significantly better.

Other SOLIDWORKS PDM Enhancements

SOLIDWORKS PDM 2023 offers enhanced data security, support for the latest Windows[®] operating system, and other improvements.

- SOLIDWORKS PDM encrypts all the data traffic to and from the archive server.
- SOLIDWORKS PDM 2023 supports the Windows[®] 11 operating system.
- In SOLIDWORKS PDM File Explorer, you can copy static text from data cards.
- The language for the user interface of eDrawings[®] Web Viewer follows the language specified in Web2.



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Dassault Systèmes, the **3DEXPERIENCE** Company, is a catalyst for human progress. We provide business and people with collaborative virtual environments to imagine sustainable innovations. By creating virtual twin experiences of the real world with our **3DEXPERIENCE** platform and applications, our customers can redefine the creation, production and life-cycle-management processes of their offer and thus have a meaningful impact to make the world more sustainable. The beauty of the Experience Economy is that it is a human-centered economy for the benefit of all –consumers, patients and citizens.

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