# **Introduction to Blue Byte Systems Products**

Welcome to Blue Byte Systems, a leading provider of innovative solutions designed to enhance the efficiency and productivity of your business operations. Our suite of products is tailored to meet the diverse needs of industries utilizing SOLIDWORKS PDM, offering robust tools for data management, process automation, and task optimization. Below is an overview of our key products:

## PDM Convert Task Extended

PDM Convert Task Extended simplifies the conversion of files within your SOLIDWORKS PDM vault. This add-in automates the process, saving you time and reducing manual effort. It supports multiple file formats and provides flexible configuration options to suit your specific requirements.

## PDM2Excel

PDM2Excel bridges the gap between your PDM system and Excel, enabling seamless data export. This tool allows you to extract and organize PDM data into Excel spreadsheets for analysis, reporting, and sharing. It enhances data accessibility and helps you make informed decisions based on accurate information.

## RevisionSync

RevisionSync ensures consistency across your PDM system by synchronizing revisions automatically. This tool helps maintain the integrity of your data, preventing discrepancies and ensuring that all users have access to the latest version of files. It streamlines the revision process and enhances collaboration within your team.

# **Getting support**

## **Continuous Improvement and Support**

At Blue Byte Systems, we are committed to continuous improvement and providing exceptional support to our customers. Our products are regularly updated with new features and enhancements based on user feedback. We also offer comprehensive documentation and dedicated support to help you get the most out of our solutions.

#### How to reach out?

If you need support, please reach out to us by clicking the button below:

**Create Project** 

## **PDM Convert Task Extended**

Thank you for choosing **PDM Convert Task Extended** ☑!

PDM Convert Task Extended is a SOLIDWORKS PDM task add-in that lets you save your SOLIDWORKS files using advanced filters and provides power capabilities to place custom properties/datacard, BOM quantities on PDFs and merge them.

## Requirements

The minimum version PDM Convert Task Extended supports is SOLIDWORKS PDM Professional 2018 SP0.



We highly recommend you use the latest version of PDM Professional.

## Support

For additional support, please contact us through the **contact** page.



#### (i) NOTE

Before reaching out, we highly suggest you read the content of this page. We have compiled these help topics to respond to the frequently asked questions by our customers.

## Installation

This section contains information about installing the PDM add-in using the binaries or the CEX file available in your Blue Byte Systems Inc. account downloads section.

#### Where to Find and Download the CEX File

PDM Convert Task Extended is packaged as a CEX file. You can download it as follows:

- 1. **Order Confirmation Email**: If you purchased PDM Convert Task Extended through our website, the order confirmation email contains both the download link to the CEX file and a valid license key.
- 2. Blue Byte Account: Log into your Blue Byte account <a href="here">here</a> and navigate to the downloads section.

## Downloading



If you have a valid license and are unable to download the CEX file, please reach out to us via the **contact** page.

- After logging into your <u>account</u> d, go to **orders**.
- In the **downloads** tab, find the latest version of the CEX file. The CEX files are named after the addin and the compile date. The latest version will be at the bottom of the table.
- The CEX will download within a .zip file.
- You may need to check if your Windows security policies have blocked the download.

#### Downloading a Blocked .zip File

In the downloads section of your web browser, do the following:

- 1. Right-click on the blocked .zip file.
- 2. Go to **Properties**.
- 3. *Uncheck* the **Unblock** checkbox.
- 4. Click Apply and then OK.

## Extracting the .zip File

To unzip the .zip file:

- 1. Right-click the .zip file.
- 2. Select Extract.

## Loading the PDM Add-in into Your Vault

To load the PDM add-in, follow these steps:

- 1. Open the PDM Administration tool.
- 2. Log in to a user account that **has** permission to administer add-ins.
- 3. Go to File.
- 4. Click Open...
- 5. Browse to the CEX file.
- 6. Select the CEX file and click **Open**.
- 7. Drag the add-in icon from the opened CEX window onto the add-in node.

0:00



You need to permit the add-in in the task host configuration to show client computers in the execution method tab in the task setup dialog. You can permit the add-in by navigating to the PDM globe icon in the icon tray, right-clicking on it, and clicking *Task Host Configuration*.

## Updating the PDM Add-in

To update the PDM add-in, follow the instructions from the **start** of this page.

#### Administrator



#### (!) WARNING

Only perform updates when no one is using the task.

As an administrator, the process of updating the add-in is very involved.

• If you have existing tasks in the task list, we recommend that you export all the options from the task dialog. The options tab has an export button. You can re-import this data later when you

recreate the task.

- Log in to the vault in the administration tool and remove the add-in.
- Perform the steps in the Client section below to refresh your PDM session.
- Perform the steps in Loading the PDM Add-in into Your Vault to load the add-in.
- Alert your PDM users to follow the instructions in the *Client* section to use the new add-in.

#### Client

Restarting your Windows session will take care of updating the add-in.

You can also update the add-in without having to restart Windows by performing the following sequence of instructions on the client machines:

- 1. Open Windows Task Manager.
- 2. Under **Details**, locate **explorer.exe** and end the process.
- 3. Do the same for the **edmserver.exe** process.
- 4. Click on **File Run...** and type in **explorer.exe** to restart File Explorer.
- 5. Navigate to your local vault view and log in. You may experience a slight delay because your local client is downloading the new version of the add-in.



To end a process in the Details tab, right-click on it and click **End**.

(i) NOTE

To avoid this issue, please consider using our continuous delivery process.

## Auto-updater add-in

The auto-updater add-in is a tool developed by Blue Byte Systems, Inc. to streamline our code delivery process for our SOLIDWORKS PDM customers.

The tool is an add-in that allows you to access your purchased add-ins and all their versions.

#### To install the add-in:

- 1. **Download the auto-updater add-in**. The link is in your order confirmation. It's also accessible from the downloads section in your account.
- 2. The auto-updater add-in is a zip archive, so make sure to right-click on it and unblock it from the file's properties before you unzip its content.
- 3. In your administration tool, log into your vault and then go to **File > Open** and browse to Auto-UpdaterAddInVX.cex (unzipped content).
- 4. Click **OK** to open the CEX file.
- 5. Drag and drop the auto-updater add-in icon onto the add-ins node in the administration tool. This will add the add-in into the add-ins node.
- 6. Right-click on the add-in and click on **Server Credentials...**
- 7. Add your server credentials and click on **Close**. Your server credentials are your Blue Byte Systems account credentials.

#### To update an add-in:

- 1. Right-click on the add-in and click on **Update add-ins...**
- 2. This will show the main dialog of the add-in where you can select from the dropdown list the program you would like to install.
- 3. Click on the **Install** button to install the selected add-in.
- 4. The process might take a few moments, so please wait.
- 5. You will be prompted at the end to restart your PDM session. This allows your local client to get the new version of the installed add-in.

# Warnings

**! WARNING** 

You must backup your tasks. The auto-updater does not update your existing tasks or permit the add-in the *Task Host Configuration*.

**! WARNING** 

All client computers using the add-in's tasks must be restarted to use the new version.

## **License Information**

This section denotes how to manage a license.

## Managing a License

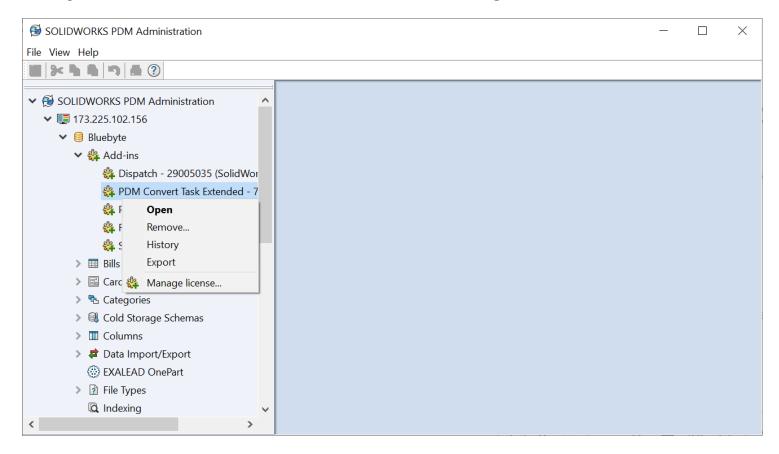
Your license is made of a **secret key** that was provided to you in the *order confirmation email*.

Your license entitles you to use PDM Convert Task Extended:

- For a specified duration.
- A number of domains (number of vaults where you can install the add-in).

To manage your license:

- Log into your vault from the PDM Administration tool.
- Right-click the add-in from the Add-ins node and select Manage license...



## **Activating a License**

To activate a license:

• Enter your license key and click Activate to consume the license from the previous step.



## **Deactivating a License**

To deactivate a license:

• Click **Deactivate** on the **previous step** to stop using the license on the logged-in vault.

## Renewing a License

To renew the license, please follow these instructions:



#### **⊗** IMPORTANT

Do not commence the process below until you have your license key.

- 1. Open the PDM Administration tool.
- 2. Expand the Add-in nodes and right-click on PDM Convert Task Extended.

- 3. Click Manage license...
- 4. Click **Deactivate** (You must be connected to the Internet).
- 5. *Close* the window.
- 6. Repeat the process of clicking on Manage license...
- 7. Enter your license key and click **Activate**.
- 8. Your new expiry date should appear when the license is renewed.

# **License Common Issues**

If you attempt to deactivate and reactivate your license, you may get the following error: **Failed to get license information from the server. Error 60** 

First name:	Amen Allah	
Last name:	Jlili	
Company name:	Blue Byte Systems Inc	
Email:	amen@bluebyte.biz	
License Key:	•••••	
Failed to get license information from server. Error 60		

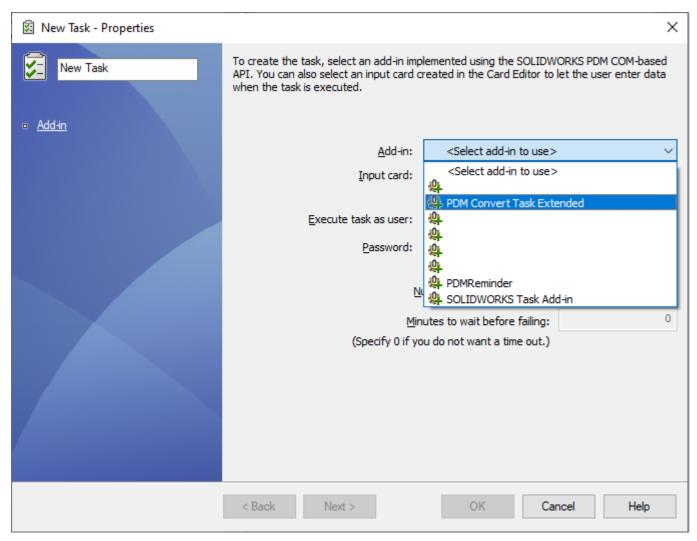
#### To solve this issue:

- 1. Close the Manage license... window.
- 2. Right-click on the add-in and click **Manage license...**
- 3.  $\emph{Add}$  your license key to the  $\emph{License Key}$  field.
- 4. Click **Activate** to consume your license again.

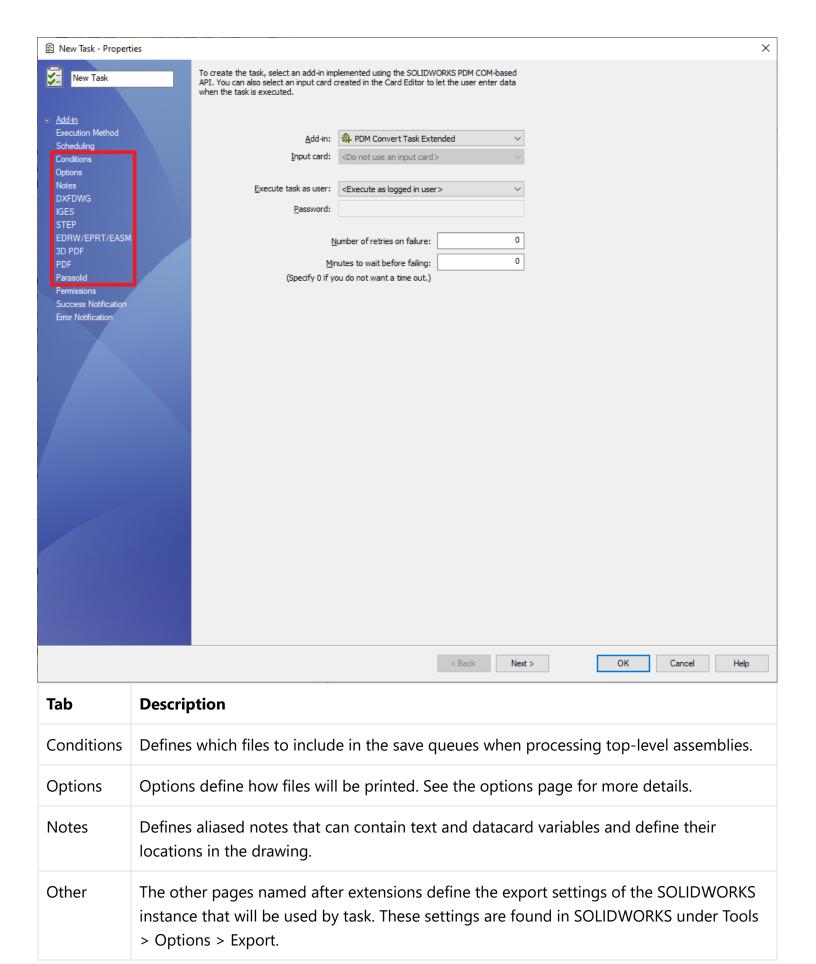
# Setting your task

This section will detail the setup pages that require explanation.

When you create a new task, please choose PDM Convert Task Extended from the dropdown in the first page of the task setup dialog like below:



Setup pages

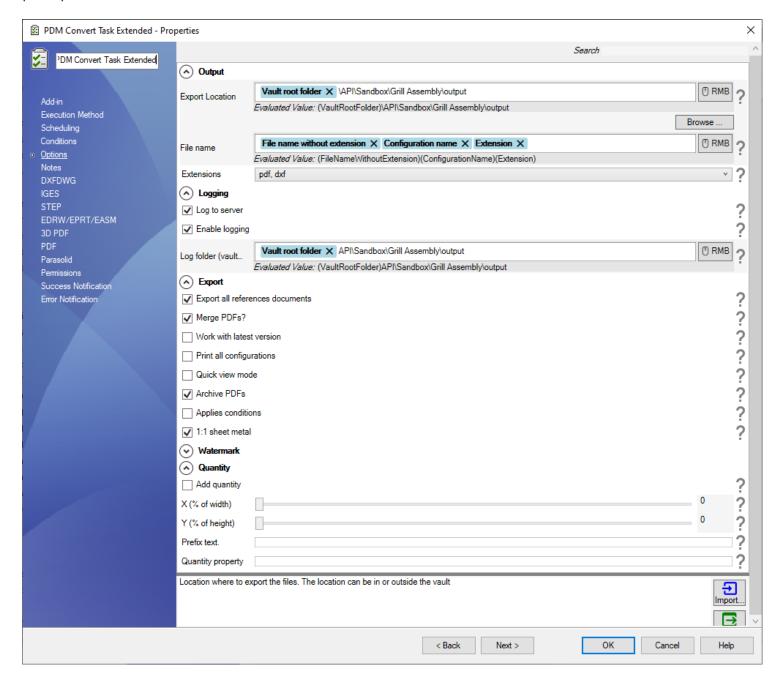




Start by defining the options page for your test runs.

## **Options Setup Page**

When you choose PDM Task Convert Extended from the dropdown in the new task dialog, you will be prompted a window that is similar to the one below:



Option	Description	
Output	This is where you specify the location where you want the exported documents to be saved. This location can be inside or outside the vault.	
Extensions	These are the extensions the task should export. Supported extensions are:  • PDF  • DXF  • DWG	

Option	Description
	<ul> <li>IGES</li> <li>X_T</li> <li>STEP</li> <li>eDrawings <ul> <li>eprt</li> <li>easm</li> <li>edrw</li> </ul> </li> <li>U3D (3D PDF)</li> <li>HTML (You need eDrawings Professional 2019-2023 installed on the machine that runs the task.)</li> </ul>
Logging	<ul> <li>Specify if you want the logs to be stored in the cloud.</li> <li>Specify where you want the logs to be saved. The location must be in PDM.</li> </ul>

Option	Description
Export	<ul> <li>Export referenced documents of assemblies: This means that if the processed file is an assembly, the task will attempt to export all the available references from the assembly.</li> <li>Merge referenced documents <ul> <li>This will merge all exported PDFs.</li> </ul> </li> <li>Export all configurations <ul> <li>This will attempt to export all configurations of parts and assemblies.</li> <li>Please make sure you include the configuration name alias in the output filename.</li> </ul> </li> <li>Work with latest version <ul> <li>Task will attempt to get the latest version of the file to be printed.</li> </ul> </li> <li>QuickView <ul> <li>Opens documents in quick view or large design mode.</li> <li>This option will increase performance with large documents.</li> </ul> </li> <li>Archive <ul> <li>Creates a zip file of the processed files</li> </ul> </li> <li>Applies conditions <ul> <li>Does not apply conditions when processing assemblies.</li> </ul> </li> <li>Export sheet metal parts <ul> <li>When enabled, task attempt to open referenced sheet metal parts from their drawing document and export their flat pattern as the specified dxf or dwg extension.</li> <li>This option will not work if drawings are opened in quick view mode.</li> <li>The notation flatPattern will be appended to the filename of the flat pattern.</li> </ul> </li> </ul>
Watermark	Add a watermark to the printed PDF. You can use the special value <b>(\$CustomProperty)</b> if the value of the desired watermark is found in a custom property.
Quantity	<ul> <li>Add the document quantity from the calculated BOM of the top-level assembly. Two options:</li> <li>Using custom property in your sheet format. Task writes quantity to custom property and rebuilds drawing.</li> <li>Define the location and pretext of a note the task adds to drawing before printing to DPF. Use this option if you do not have a predefined custom property in your sheet format</li> </ul>

# **Important Notes About Creating Tasks**

Please consider the following recommendations when creating a new task using PDM Convert Task Extended:

#### 1. Execution method

- 1. In the execution method tab that appears on the blue left sidebar, please:
- 2. Choose the radio box option "Let the system decide which computer to execute the task".
- 3. Choose **one computer**. We recommend that our customers opt for the server. The server needs to have a SOLIDWORKS PDM Client installed with a local view as well as SOLIDWORKS 3D.
- 2. On the first page of the task, execute the task with a user that has the right workflow and file/folder permissions.



We also recommend disabling the auto-add extensions by removing all the extensions the task uses including txt.

This prevents race conditions between SOLIDWORKS PDM and the task during files add process.

To change the auto-add extensions list,

- 1. Go to the PDM Administration tool
- 2. Right click on the username (or all users)
- 3. Select **Settings**
- 4. *Click* on the *Adding Files* selection and edit the file extensions

Settings ? ×

#### Adding Files

Adding Folders Check In Copy Tree Explorer

File Compare

Language

Menus

Messages

Reference Dialog

Toolbar Viewers When a file is saved to SOLIDWORKS Enterprise PDM from a program's Save As dialog box it will be added to the file vault automatically. When files are added to the file vault folder structure without involving the Save As dialog box, they will not be added to the file vault database unless they are listed below.

Enter file extensions of the file types which SOLIDWORKS Enterprise PDM always should try to add, even when files are not saved via the Save As dialog box (separate the file extensions with semicolons):

nt;eprt;easm;edrw;dst;xml;apj;sldasm;sldprt;iam;par;asm;dft;slddrw;cwr;cfg;mdb;markup;dod

Enter file patterns of files which SOLIDWORKS Enterprise PDM should never try to add, even if they are saved via the Save As dialog box (separate file patterns with semicolons):

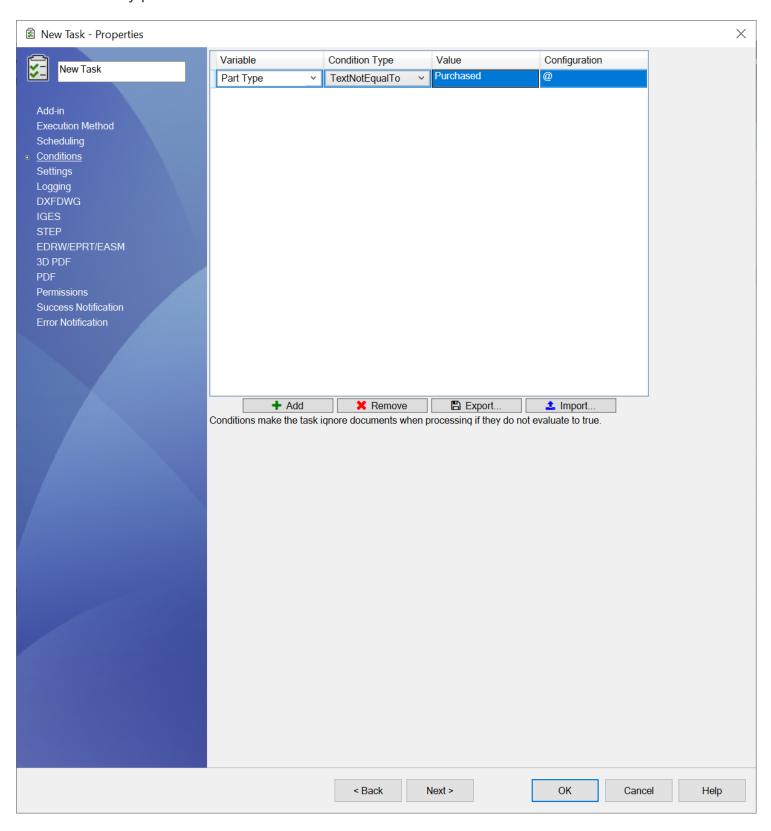
~\$\*;\*.newVer.\*

The excluded file patterns may contain wildcard characters such as \* (zero or more arbitrary characters) or ? (exactly one arbitrary character).

# **Conditions Setup Page**

Conditions can be added to a task to include or exclude files from being processed.

The task will only process files that evaluate all of the set conditions as true.



## (i) NOTE

The condition above for example will only allow files where the Part Type variable from the @ tab is different than the value Purchased.

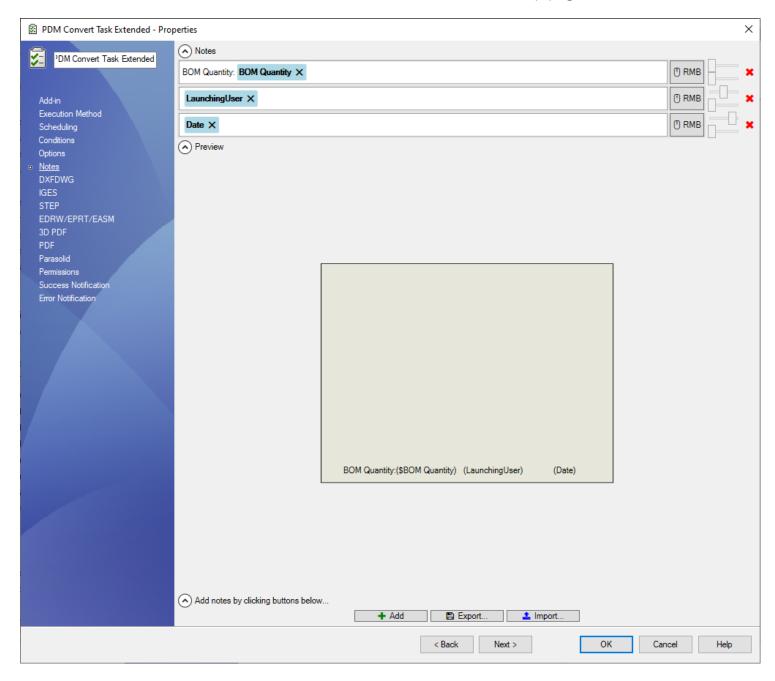
To add a condition, *click* the **Add** button.

# **Condition Options**

Option	Description
Variable	Variable name with the run the condition on.
Condition Type	Operation type to process.
Value	Value to evaluate the condition against.
Configuration	Configuration: Specify the configuration from which to get the value of the variable. Use @ in general.

# **Notes Setup Page**

Notes can be added to converted PDF documents via this the *Notes* setup page.



To add a note, click the **Add** or **Import...** button.

A note is defined by:

#### 1. Location

• Use the sliders on the right side of the note text area to define the location.

#### 2. Value

• The text area allows combinations of text and special values. The special values are evaluated for you during the task execution.

# **Frequently Asked Questions**

Question	Answer
I'm unable to consume my license	Make sure your system/firewall allows for connections to be made to httsp://bluebyte.biz on <b>port 443</b> . Contact us if this problem still persists.
I'm running the add-in on assembly and it is not capturing all the references.	Make sure that the assembly and its references have local copies on the machine that runs the add-in. You can do that by doing a get-latest on the assembly and its references in the machine that runs the task. This is a bydesign behavior of the PDM Convert Task Extended.
The task is unable to check in the log file.	This could be related to a number of issues. You may need to make sure the user running the add-in has proper file and folder permissions on the log folder. You also need to make sure that the txt file extension is NOT part of the <a href="mailto:auto-add-user-setting">auto-add user setting</a> .

# **Getting Started**