Introduction

Here is the introduction for the Blue Byte Systems Inc. products.

PDM Convert Task Extended

Thank you!

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

About

PDM Convert Task Extended is a SOLIDWORKS PDM Professional task Add-in that can export SOLIDWORKS documents to a large number of extensions and merge PDFs.

Support

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

> ⓘ **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.

Installing the PDM Add-in manually

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

PDM Professional Version

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

> (i) **TIP**
>
> *We highly recommend you use the latest version of PDM Professional.*

Where to find and download the CEX file?

PDM Convert Task Extended comes packaged as a CEX file. The download can be found by the following:

1. The order confirmation email when purchasing PDM Convert Task Extended.
   - This email contains both the download link to the CEX file and a valid license key.
2. By logging into your bluebyte.biz account **here** and navigating to the **Downloads** section.

Downloading

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

The CEX will download within a .zip file.
After downloading the file from the **Downloads** section of your **account**, 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 **block** checkbox.
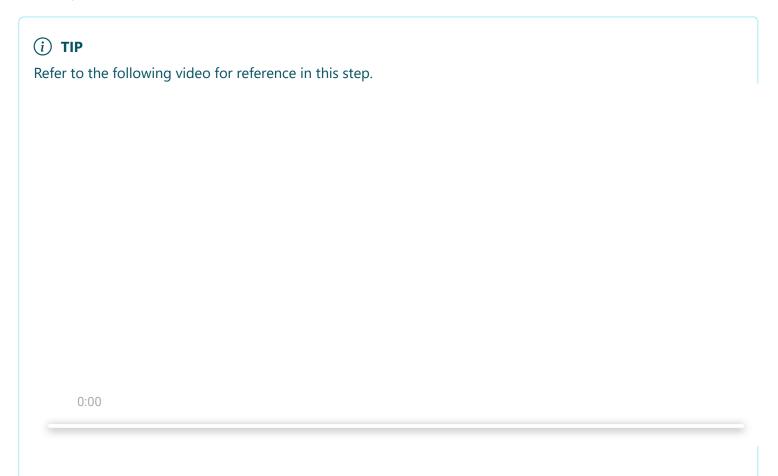4. *Click* **Apply** and then **OK**.

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. *Login* 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.

ⓘ **TIP**

Refer to the following video for reference in this step.

0:00

Updating the PDM Add-in

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

Client machines

For the change to be reflected on client computers, one of the following must be done:

1. *Restart* the **client computer**.
2. *End* the PDM Process, ***edmserver.exe*** and *restart* the File Explorer Process.

> ⓘ **NOTE**
>
> To avoid this issue, please consider using **our continuous delivery process**⧉.

Installing PDM Convert Task Extended using the Blue Byte Systems Inc. auto-updater

To install PDM Convert Task Extended using the auto-updater, please follow the instructions in this **blog post**⧉.

License Information

This section denotes how to manage a license.
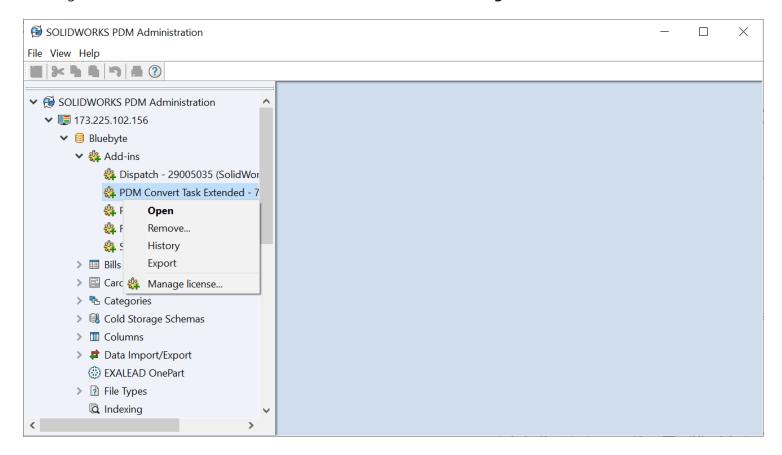
Managing a License

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).
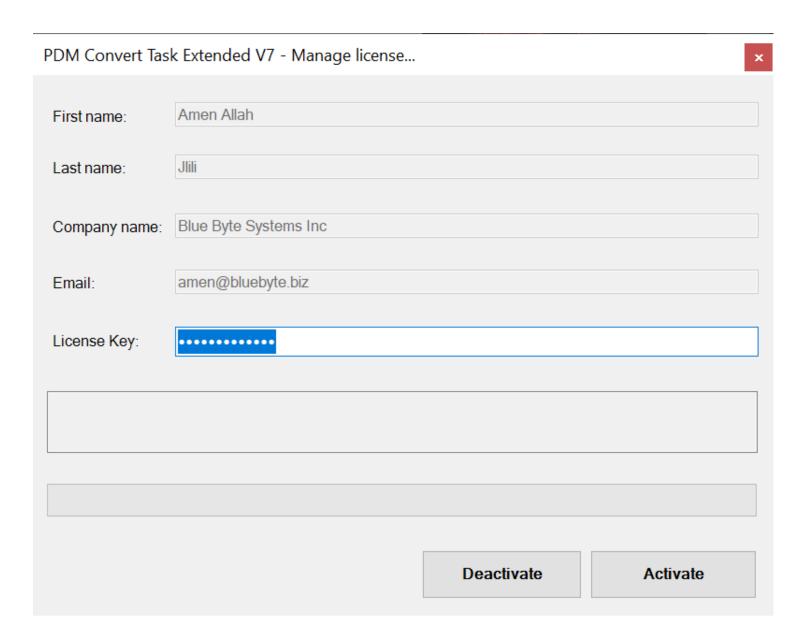
To manage your license:

- 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.

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. *Add* your license key to the ***License Key*** field.
4. *Click* ***Activate*** to consume your license again.

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...
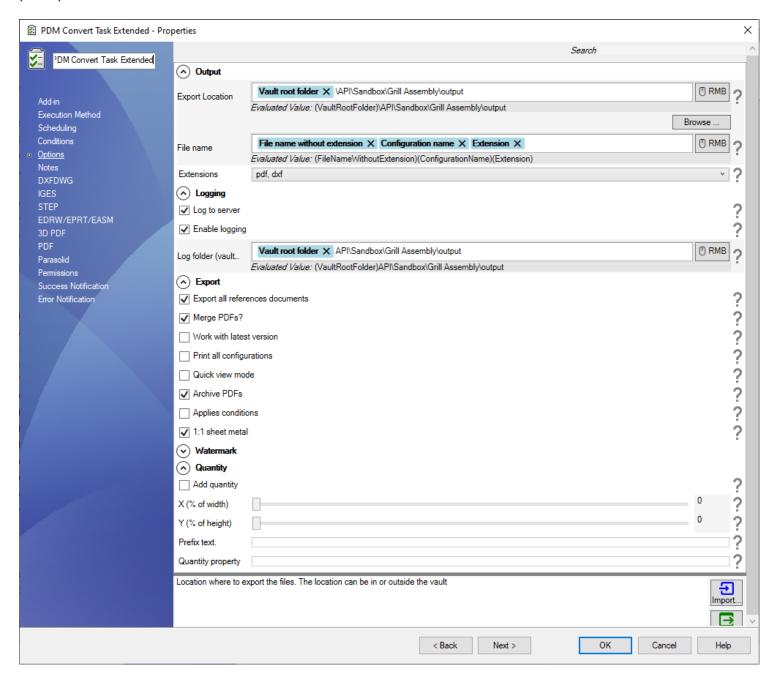7. *Enter* your license key and *click* ***Activate***

8. Your new expiry date should appear when the license is renewed.

Properties page

This section will detail the setup pages that require explanation.

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.

Option	Description

Extensions	These are the extensions the task should export. Supported extensions are:
	• PDF
	• DXF
	• DWG
	• IGES
	• X_T
	• STEP
	• eDrawings
	   ○ eprt
	   ○ easm
	   ○ edrw
	• U3D (3D PDF)
	• HTML (You need eDrawings Professional 2019-2023 installed on the machine that runs the task.)

Logging	• Specify if you want the logs to be stored in the cloud. • Specify where you want the logs to be saved. The location must be in PDM.

Export	• 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.
	• Merge referenced documents
	   ○ This will merge all exported PDFs.
	• Export all configurations
	   ○ This will attempt to export all configurations of parts and assemblies.
	   ○ Please make sure you include the configuration name alias in the output filename.
	• Work with latest version
	   ○ Task will attempt to get the latest version of the file to be printed.
	• QuickView
	   ○ Opens documents in quick view or large design mode.
	   ○ This option will increase performance with large documents.
	• Archive
	   ○ Creates a zip file of the processed files
	• Applies conditions
	   ○ Does not apply conditions when processing assemblies.
	• Export sheet metal parts

Option	Description
	○ 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. ○ This option will not work if drawings are opened in quick view mode. ○ The notation flatPattern will be appended to the filename of the flat pattern.
Watermark	Add a watermark to the printed PDF. You can use the special value **($CustomProperty)** if the value of the desired watermark is found in a custom property.
Quantity	Add the document quantity from the calculated BOM of the top-level assembly. Two options: • Using custom property in your sheet format. Task writes quantity to custom property and rebuilds drawing. • 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

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.
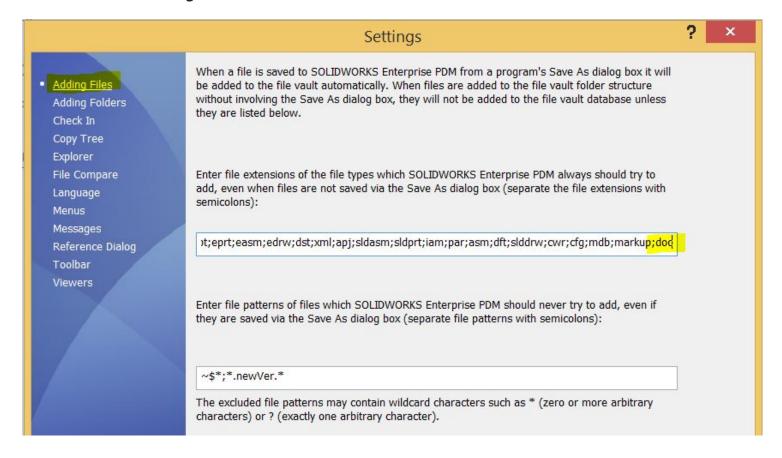
> ⓘ **TIP**
>
> We also recommend disabling the auto-add extensions by removing all the extensions the task uses including txt.
> This prevents race conditions between SOLIDWORKS PDM and the task during files add process.

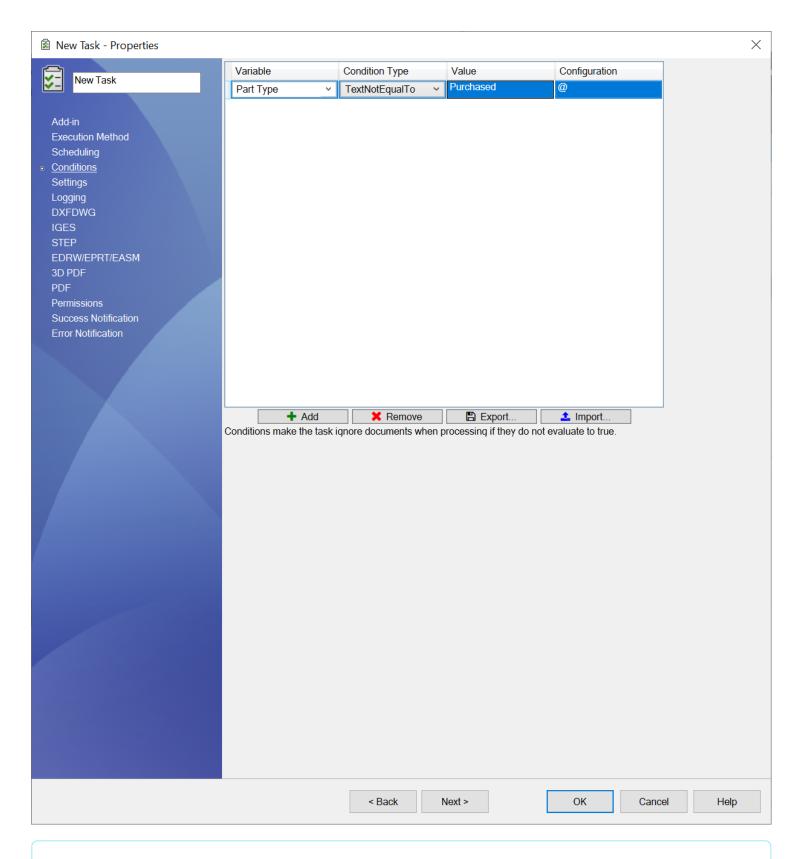To change the auto-add extensions list,

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

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*.

New Task - Properties

New Task

- Add-in
- Execution Method
- Scheduling
- Conditions
- Settings
- Logging
- DXFDWG
- IGES
- STEP
- EDRW/EPRT/EASM
- 3D PDF
- PDF
- Permissions
- Success Notification
- Error Notification

Variable	Condition Type	Value	Configuration
Part Type	TextNotEqualTo	Purchased	@

+ Add   **✖ Remove**   **🖫 Export...**   **⬆ Import...**

Conditions make the task ignore documents when processing if they do not evaluate to true.

< Back   Next >   OK   Cancel   Help

ⓘ **NOTE**

The condition above for example will only allow files where the Part Type variable from the @ tab is different than the value Purchased.
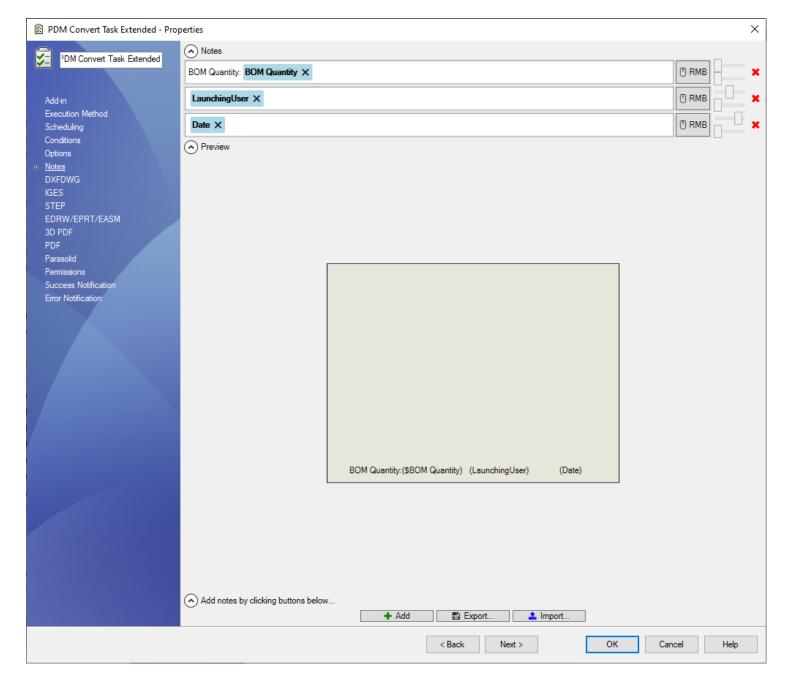
To add a condition, *click* the **Add** button.

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 **port 443**. **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 by-design 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 **auto-add user setting**⬀.

Getting Started