

Introduction

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

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.

TIP

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

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.

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 [here](#) and navigate to the **downloads** section.

Downloading

NOTE

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 [account](#), go to **orders**.
- In the **downloads** tab, find the latest version of the CEX file. The CEX files are named after the add-in 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

⊗ **IMPORTANT**

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.

TIP

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

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.

0:00

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

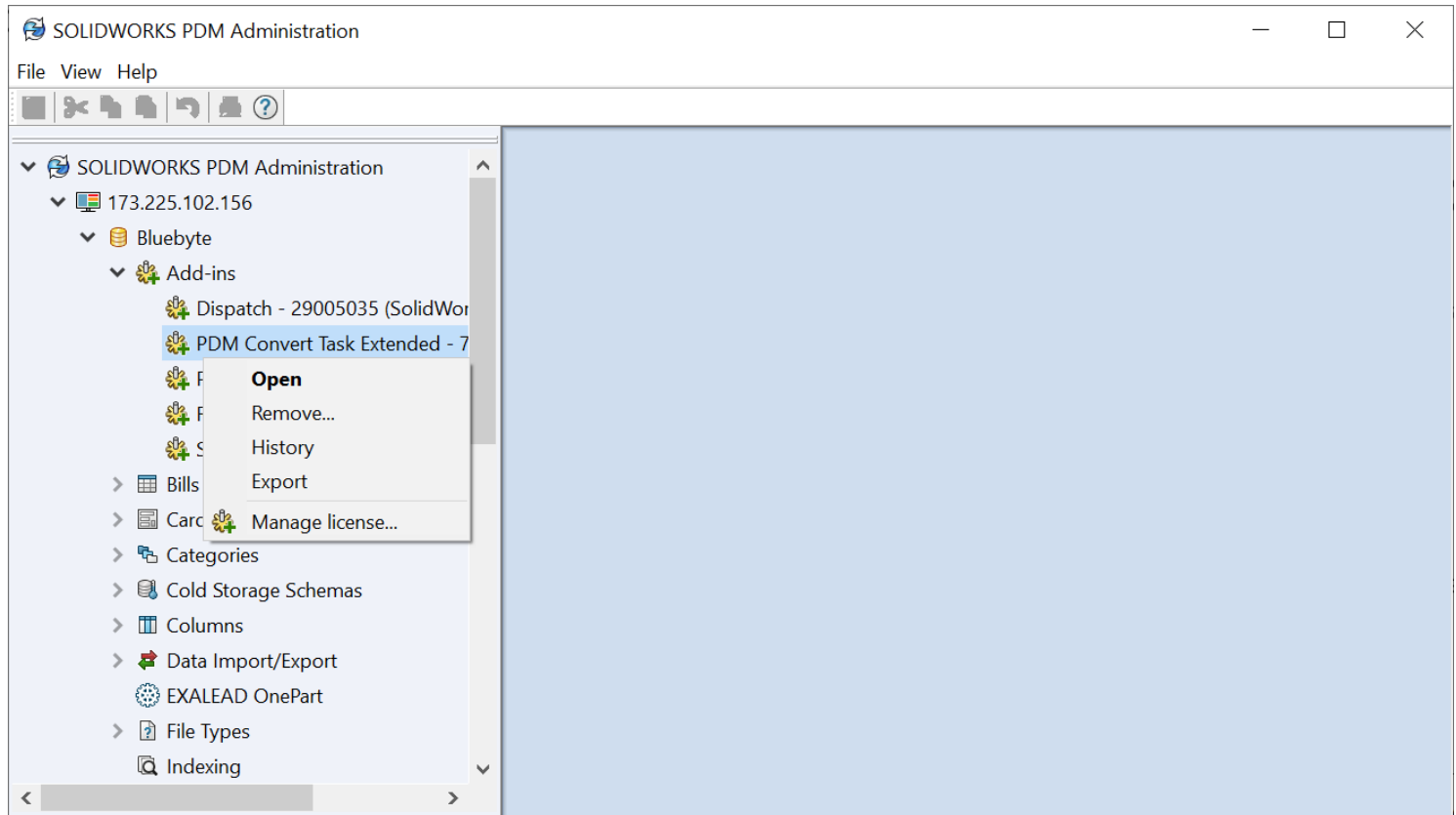
Your license is made of a **secret key** that was provided to you in the *order confirmation email*.

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](#).

First name:	<input type="text" value="Amen Allah"/>
Last name:	<input type="text" value="Jili"/>
Company name:	<input type="text" value="Blue Byte Systems Inc"/>
Email:	<input type="text" value="amen@bluebyte.biz"/>
License Key:	<input type="text" value="....."/>

Deactivate**Activate**

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

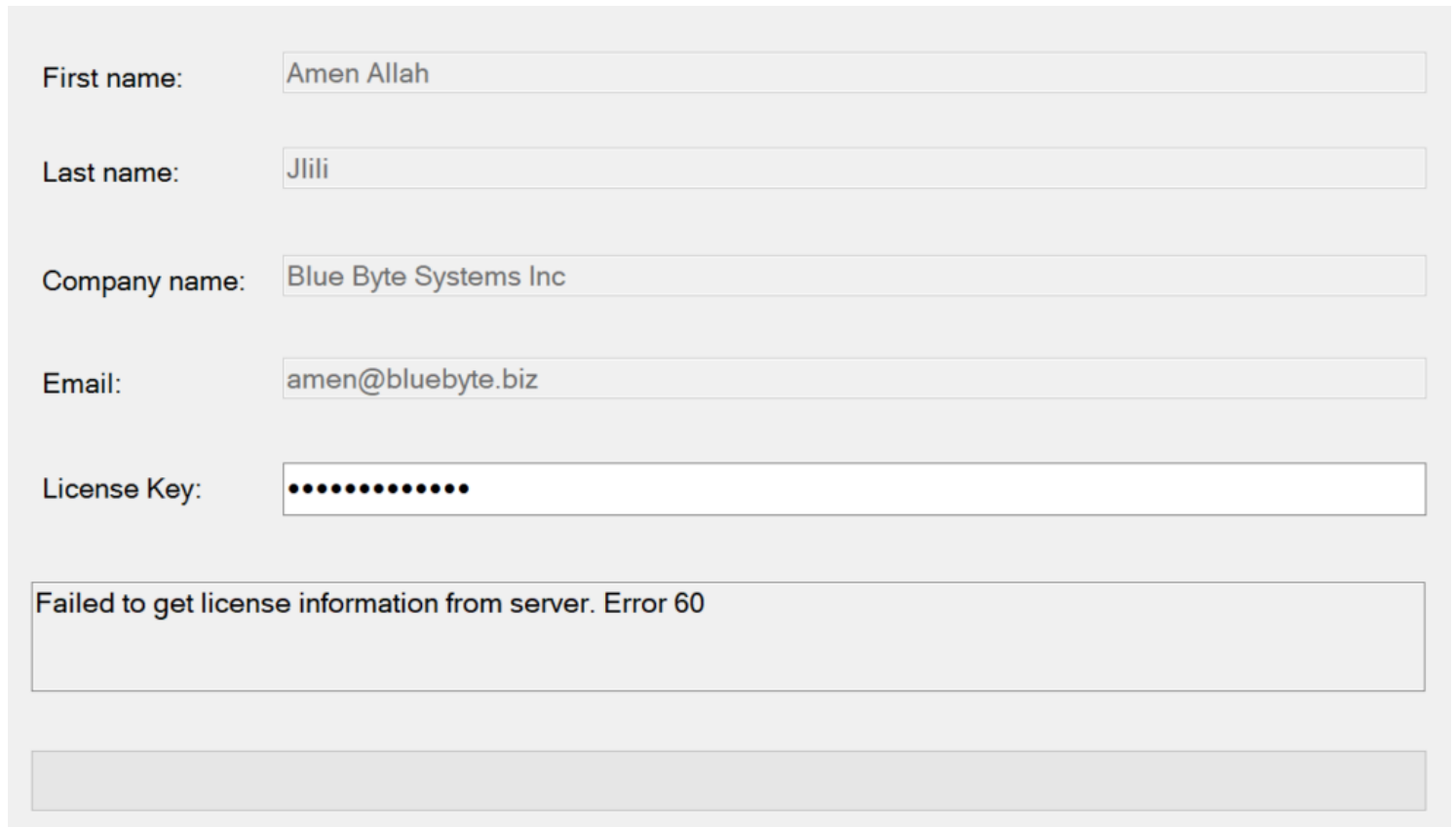
Do not commence the process below until you have your license key.

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**



The screenshot shows a license management interface with the following fields and values:

- First name: Amen Allah
- Last name: Jilili
- Company name: Blue Byte Systems Inc
- Email: amen@bluebyte.biz
- License Key: A field containing 12 dots (••••••••••••).

Below the fields, a message box displays the error: "Failed to get license information from server. Error 60". At the bottom of the form is a wide, empty rectangular box.

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.

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	<p>These are the extensions the task should export. Supported extensions are:</p> <ul style="list-style-type: none"> • PDF • DXF • DWG • IGES • X_T • STEP • eDrawings <ul style="list-style-type: none"> ◦ eprt ◦ easm ◦ edrw • U3D (3D PDF) • HTML (You need eDrawings Professional 2019-2023 installed on the machine that runs the task.)
Logging	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> ◦ This will merge all exported PDFs. • Export all configurations <ul style="list-style-type: none"> ◦ 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 <ul style="list-style-type: none"> ◦ Task will attempt to get the latest version of the file to be printed. • QuickView <ul style="list-style-type: none"> ◦ Opens documents in quick view or large design mode. ◦ This option will increase performance with large documents. • Archive <ul style="list-style-type: none"> ◦ Creates a zip file of the processed files • Applies conditions <ul style="list-style-type: none"> ◦ Does not apply conditions when processing assemblies. • Export sheet metal parts

Option	Description
	<ul style="list-style-type: none"> 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	<p>Add the document quantity from the calculated BOM of the top-level assembly. Two options:</p> <ul style="list-style-type: none"> 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

- In the execution method tab that appears on the blue left sidebar, please:
 - Choose the radio box option **“Let the system decide which computer to execute the task”**.
 - 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.
- On the first page of the task, execute the task with a user that has the right workflow and file/folder permissions.

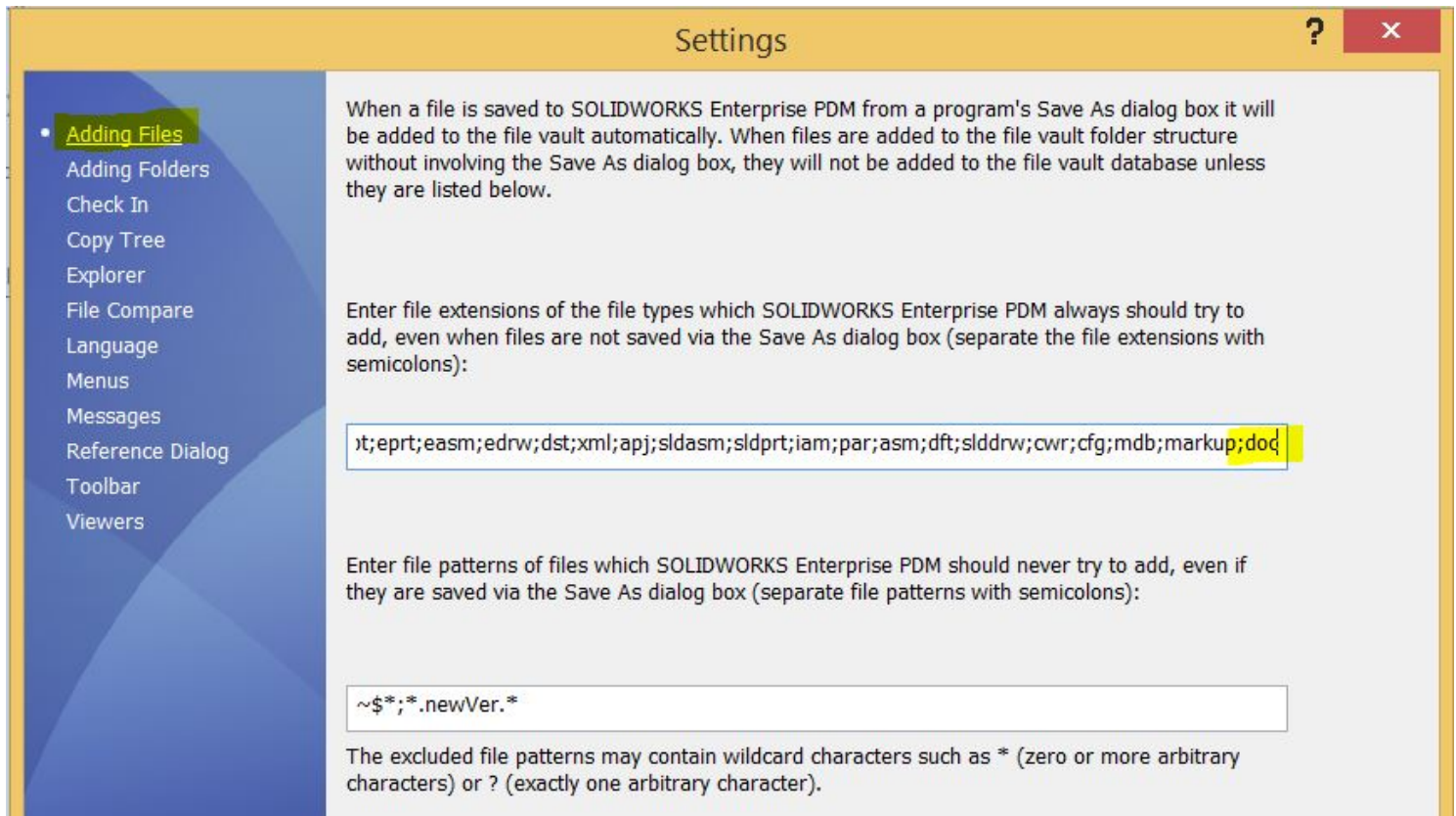
TIP

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.

PDM Convert Task Extended - Properties

Notes

BOM Quantity: **BOM Quantity** X

LaunchingUser X

Date X

Preview

BOM Quantity:(\$BOM Quantity) (LaunchingUser) (Date)

Add notes by clicking buttons below...

+ Add Export... Import...

< Back Next > OK Cancel Help

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 https://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