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:
>
> Get Support

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.

> **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 clear your PDM session of an instances of the add-in or task in memory (PDM restart).
- 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

You have two options to restart PDM:

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

2. Restarting PDM without leaving your Windows session can be done by performing the following sequence of instructions on the client machine:

    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 any new version of the add-in from the server.

> **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

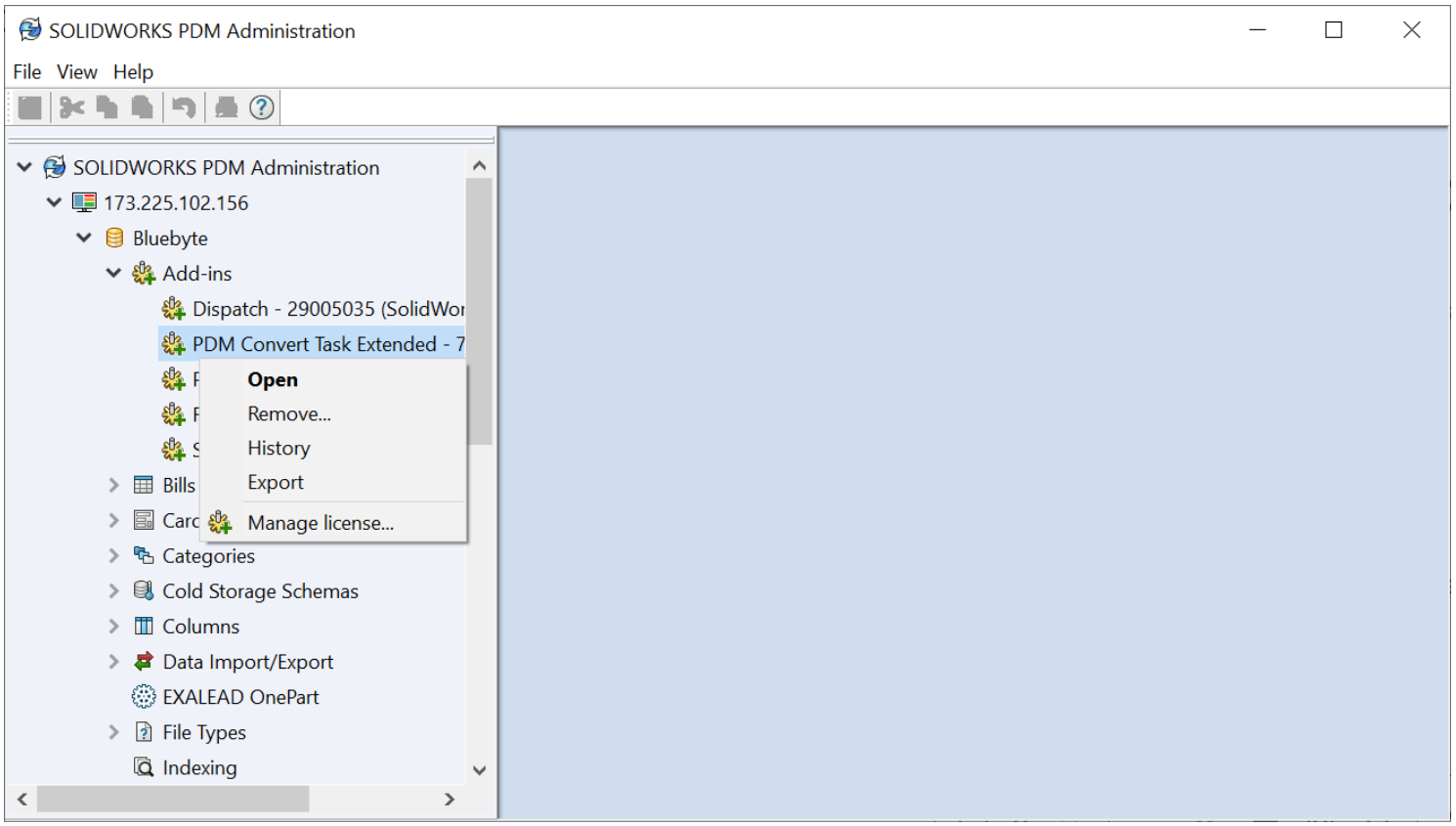
Your license is made of a **secret key** that was provided to you in the *order confirmation email*.

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:

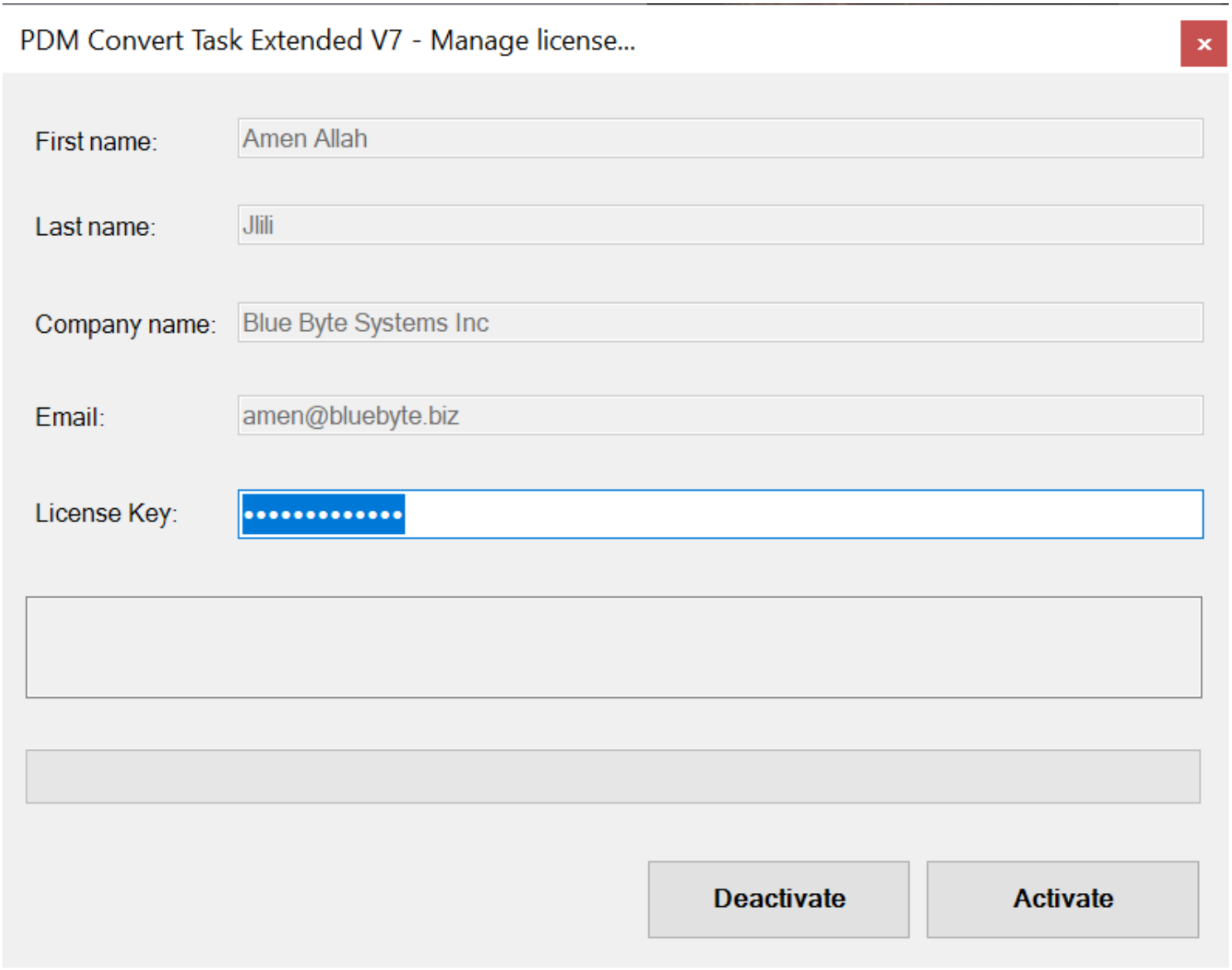
- Log into your vault from the PDM Administration tool.
- *Right-click* the add-in from the **Add-ins** node and *select* ***Manage license...***



Activating a License

To activate a license:

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



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:

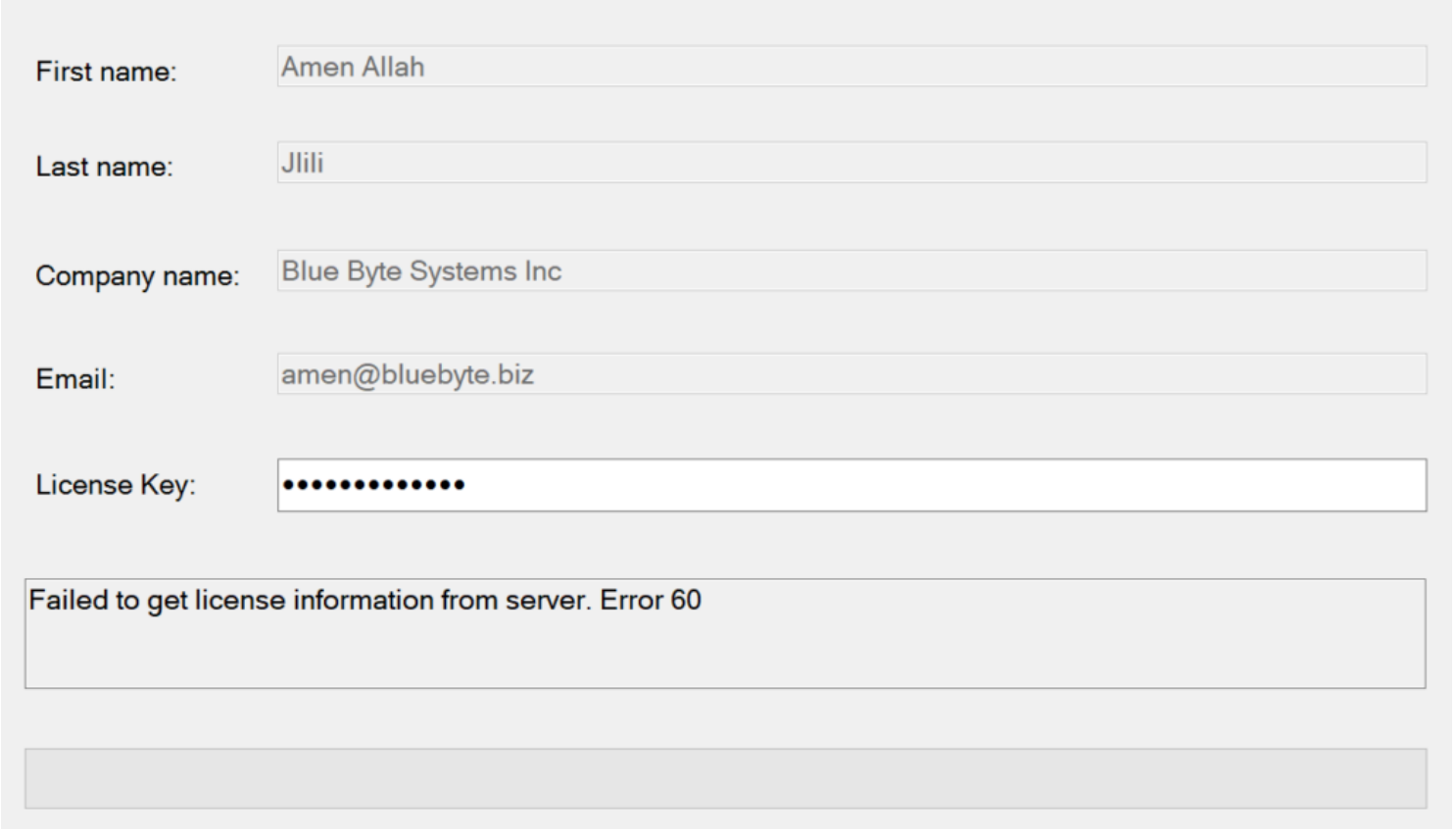
> ⊗ **IMPORTANT**
> Do not commence the process below until you have your license key.

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**



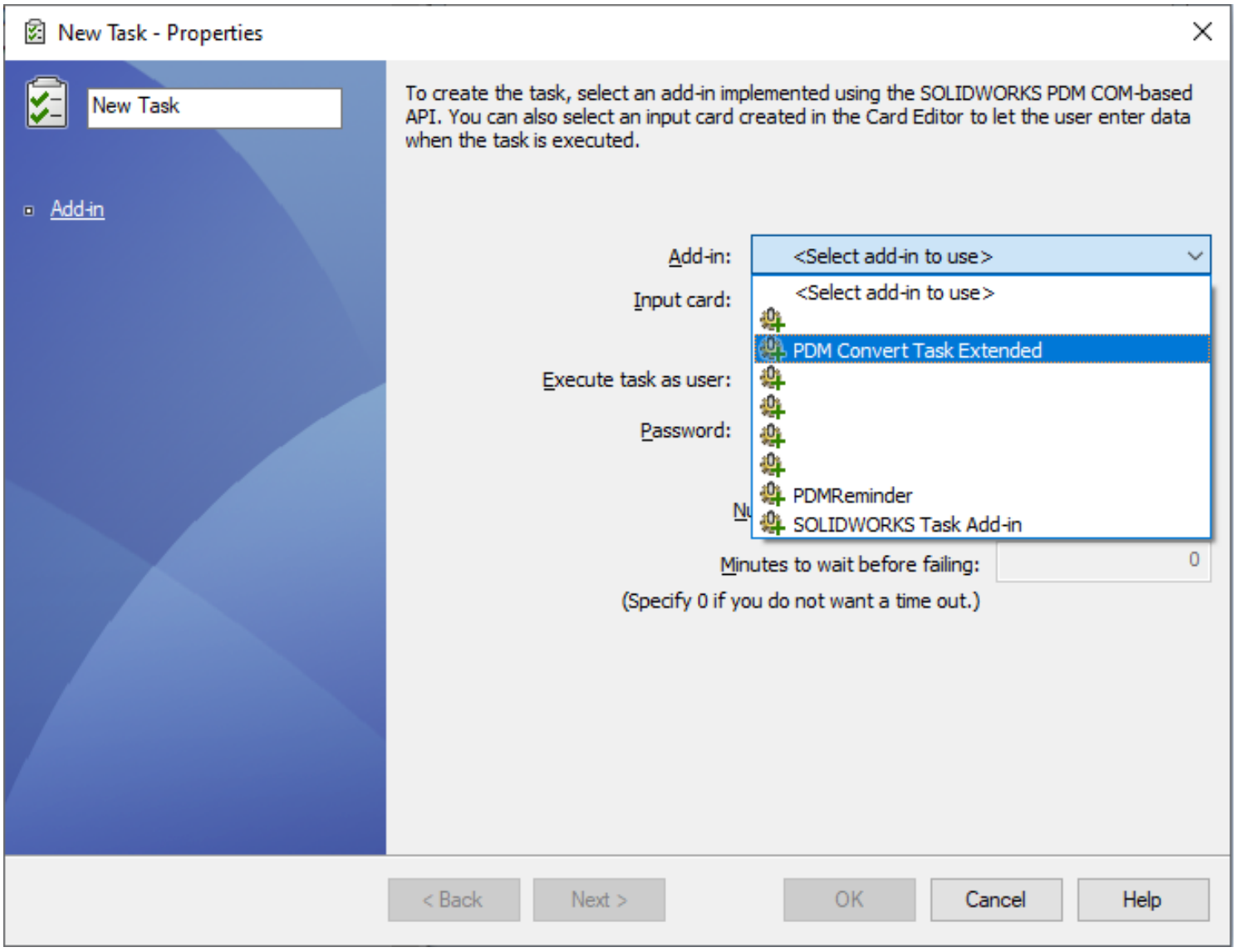
To solve this issue:

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.

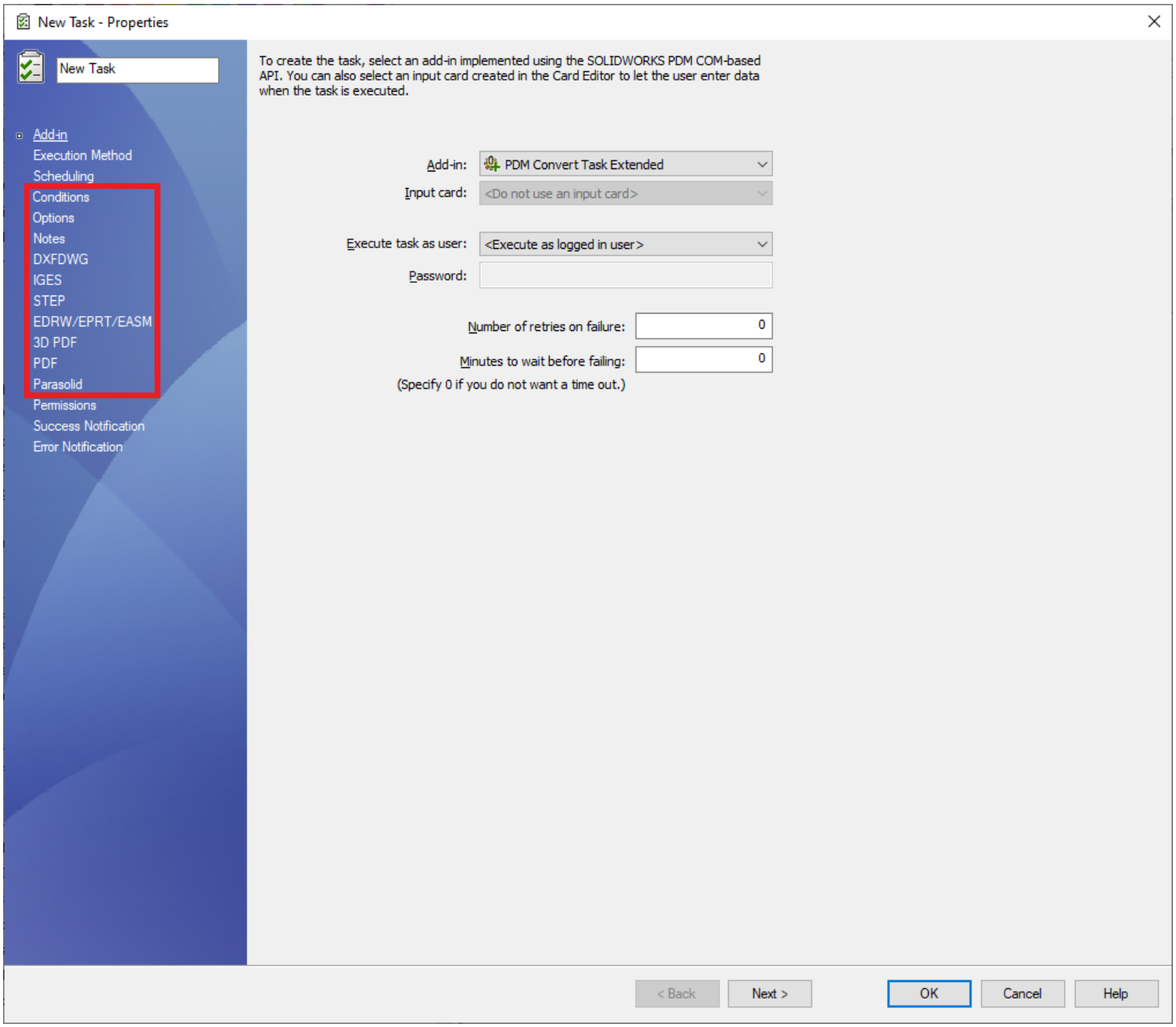
Setting your task

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



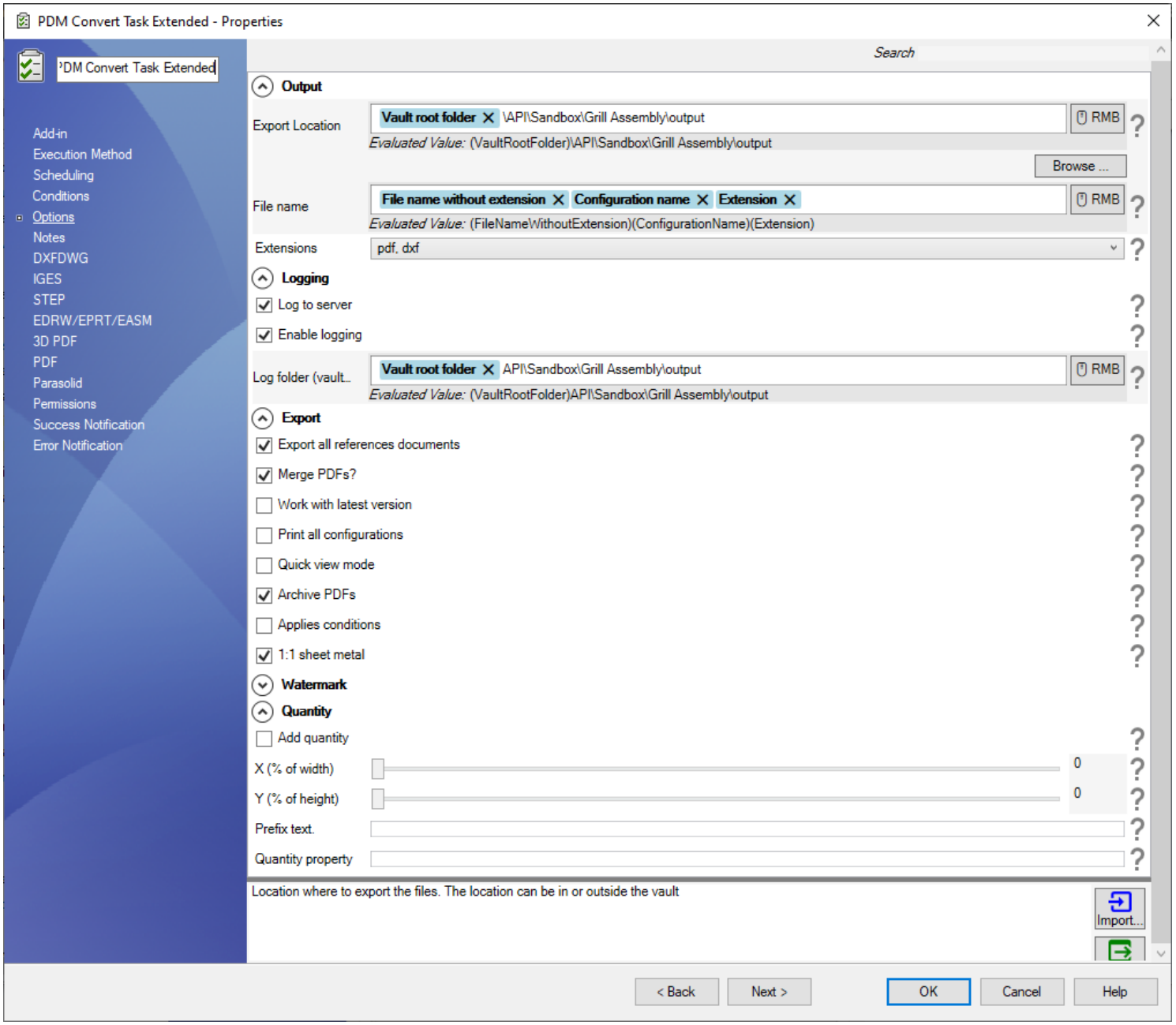
Tab	Description
Conditions	Defines which files to include in the save queues when processing top-level assemblies.
Options	Options define how files will be printed. See the options page for more details.
Notes	Defines aliased notes that can contain text and datacard variables and define their locations in the drawing.
Other	The other pages named after extensions define the export settings of the SOLIDWORKS instance that will be used by task. These settings are found in SOLIDWORKS under Tools > Options > Export.

TIP

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

	• 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.

Option	Description

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
	  ◦ 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

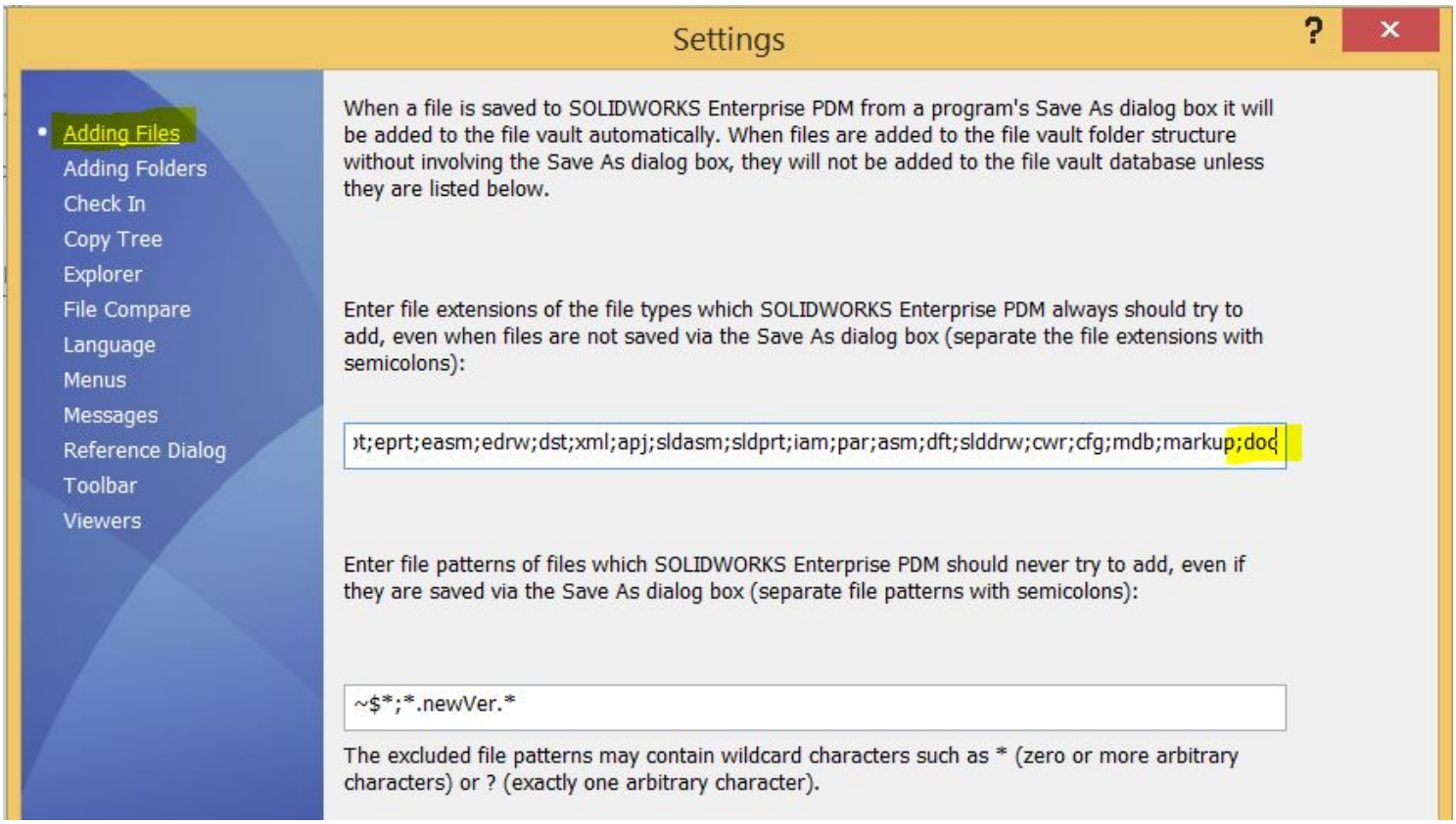
Please consider the following recommendations when creating a new task using PDM Convert Task Extended:

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.

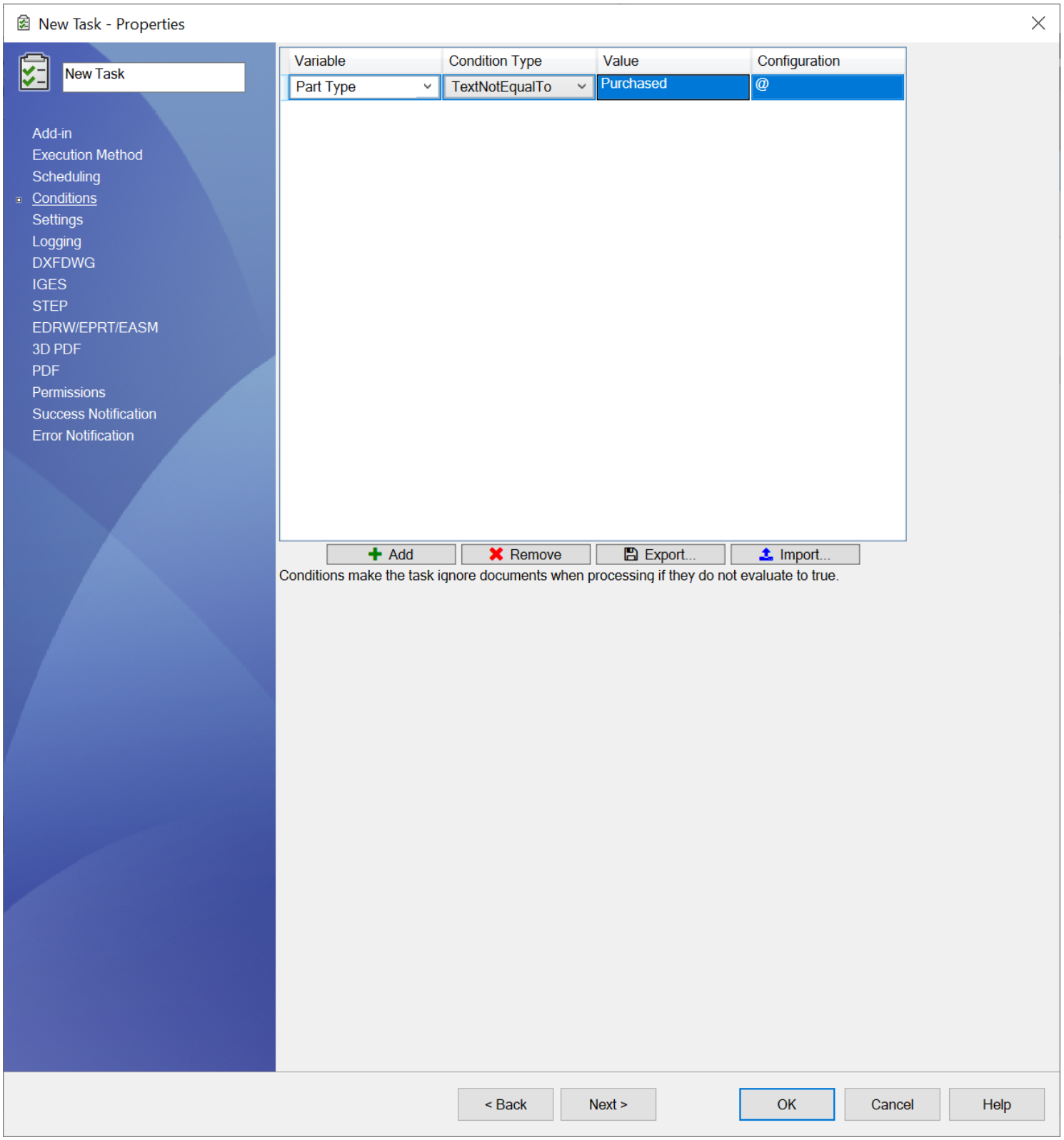
To change the auto-add extensions list,

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


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):
ɔt;eprt;easm;edrw;dst;xml;apj;sldasm;sldprt;iam;par;asm;dft;slddrw;cwr;cfg;mdb;markup;doc
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*.



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

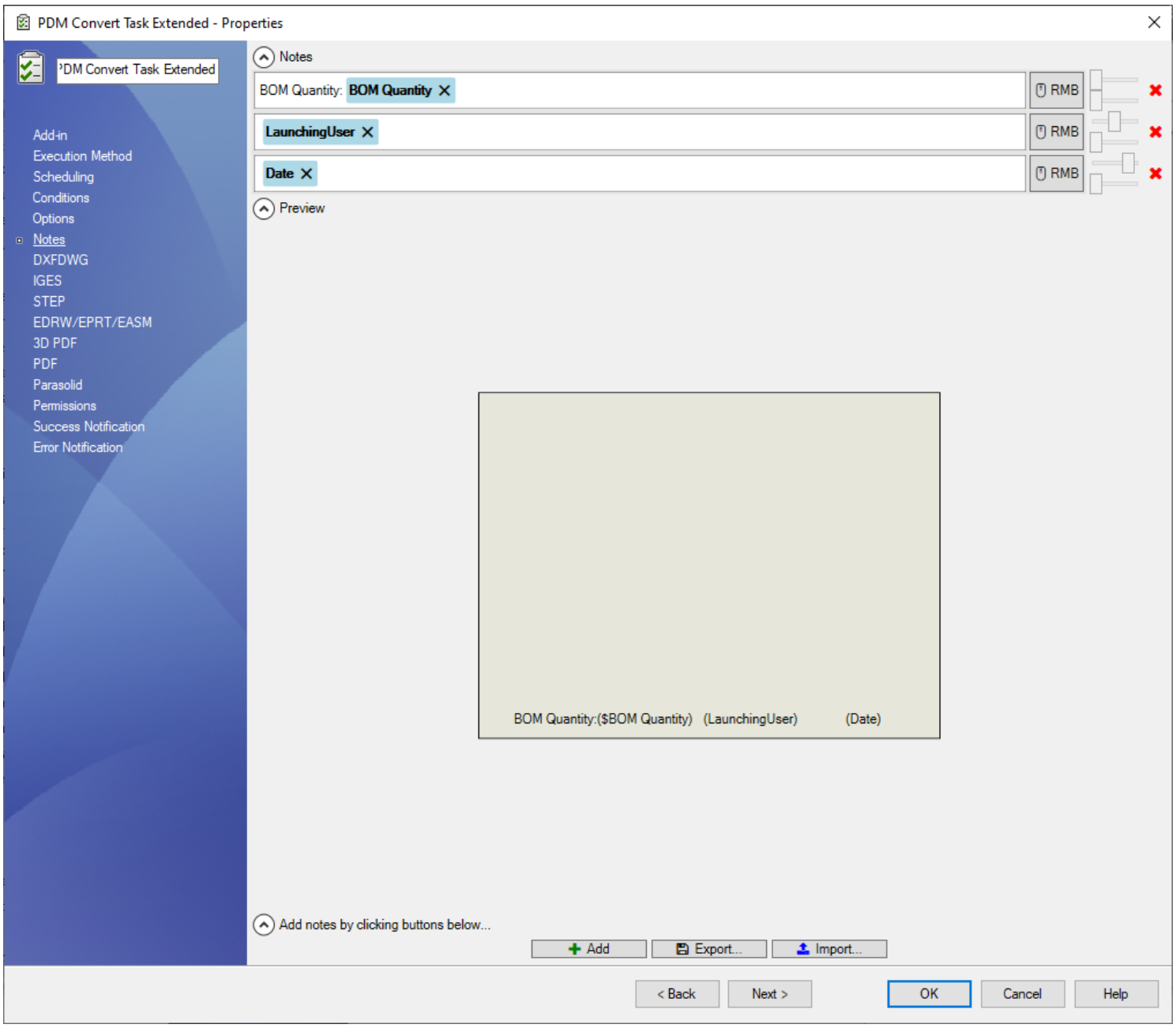
To add a condition, *click* the ***Add*** button.

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:

Definition	Description
Location	Use the sliders on the right side of the note text area to define the location.
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**.

Example

This page explains how to configure a PDM Convert Task Extended to create a parts book.

Parts Book

A parts book in manufacturing is a comprehensive reference document that provides detailed information about the various parts and components of a product or piece of machinery.

In our case, the parts book will be created from a top-level assembly.

Conditions

To create a parts book, you may want to:

- Exclude certain components from the assembly (e.g., parts that are purchased).
- Create a PDF of each component.
- Create a DXF of each sheet metal component.
- Add manufacturing quantities to the printed PDF.
- Add additional notes to the printed PDFs such as the customer name, the project, the batch number, and the time of the print.
- Merge all PDFs together.

PDM2Excel

Thank you for choosing **PDM2Excel**!

PDM2Excel is a SOLIDWORKS PDM task add-in that exports SOLIDWORKS PDM assemblies to xslx Bill Of Materials.

Requirements

The minimum version PDM2Excel supports is SOLIDWORKS PDM Professional 2017 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

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Where to Find and Download the CEX File

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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 clear your PDM session of an instances of the add-in or task in memory (PDM restart).
- 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

You have two options to restart PDM:

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

2. Restarting PDM without leaving your Windows session can be done by performing the following sequence of instructions on the client machine:

    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 any new version of the add-in from the server.

> **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

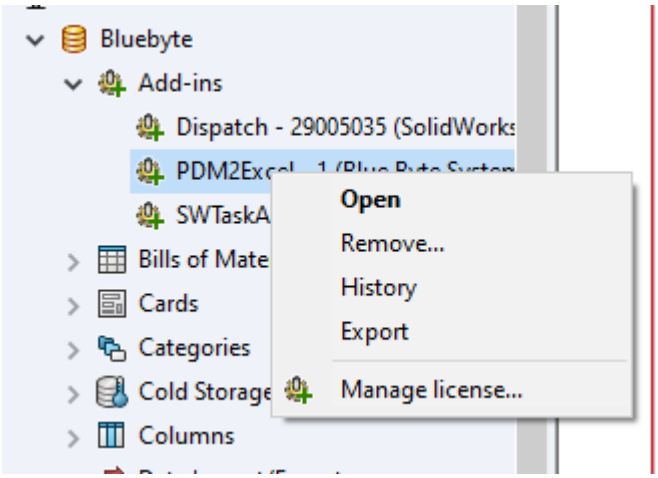
Your license is made of a **secret key** that was provided to you in the *order confirmation email*.

Your license entitles you to use PDM2Excel:

- 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...***

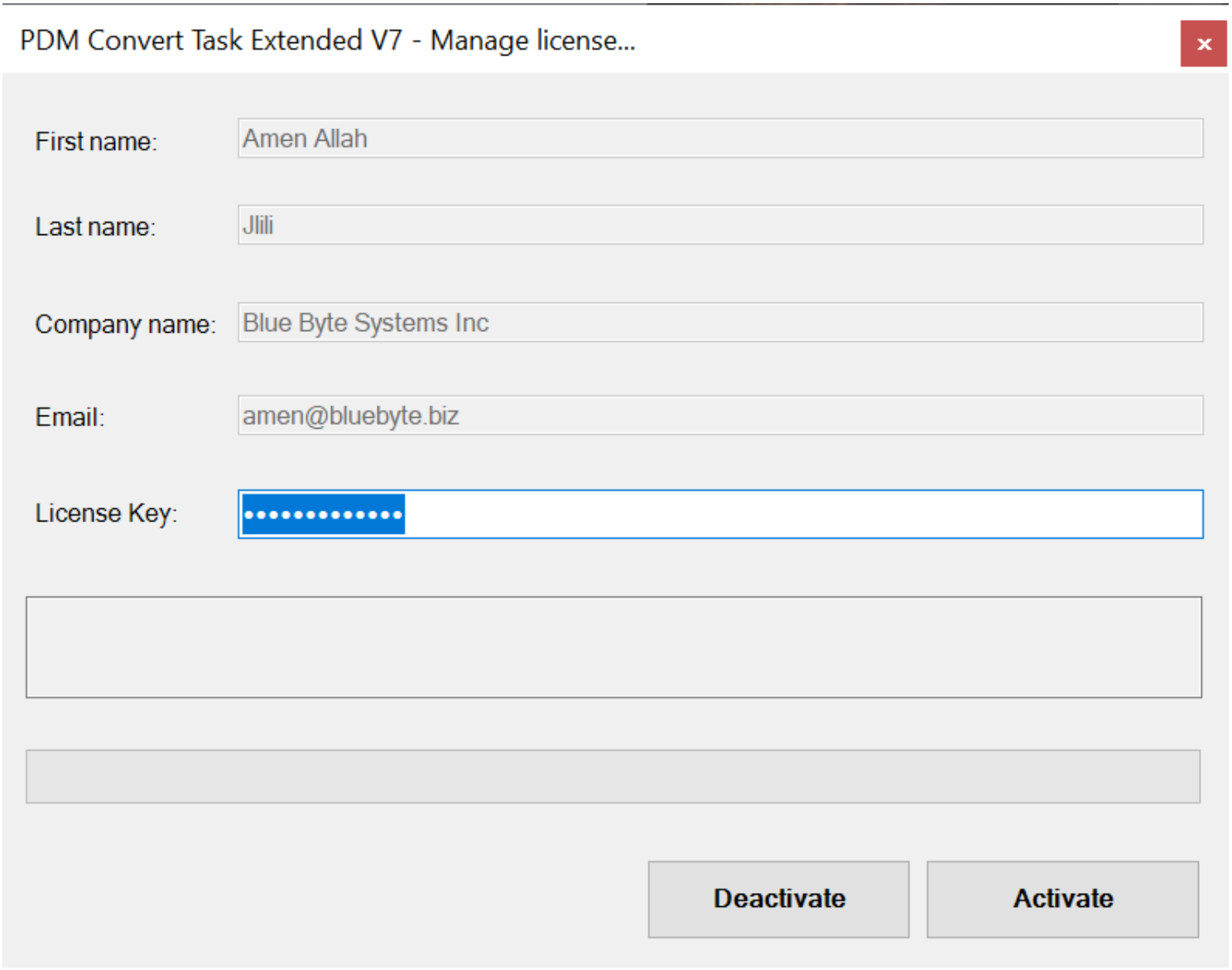


Activating a License

To activate a license:

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

TODO: Update image with PDM2Excel image



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:

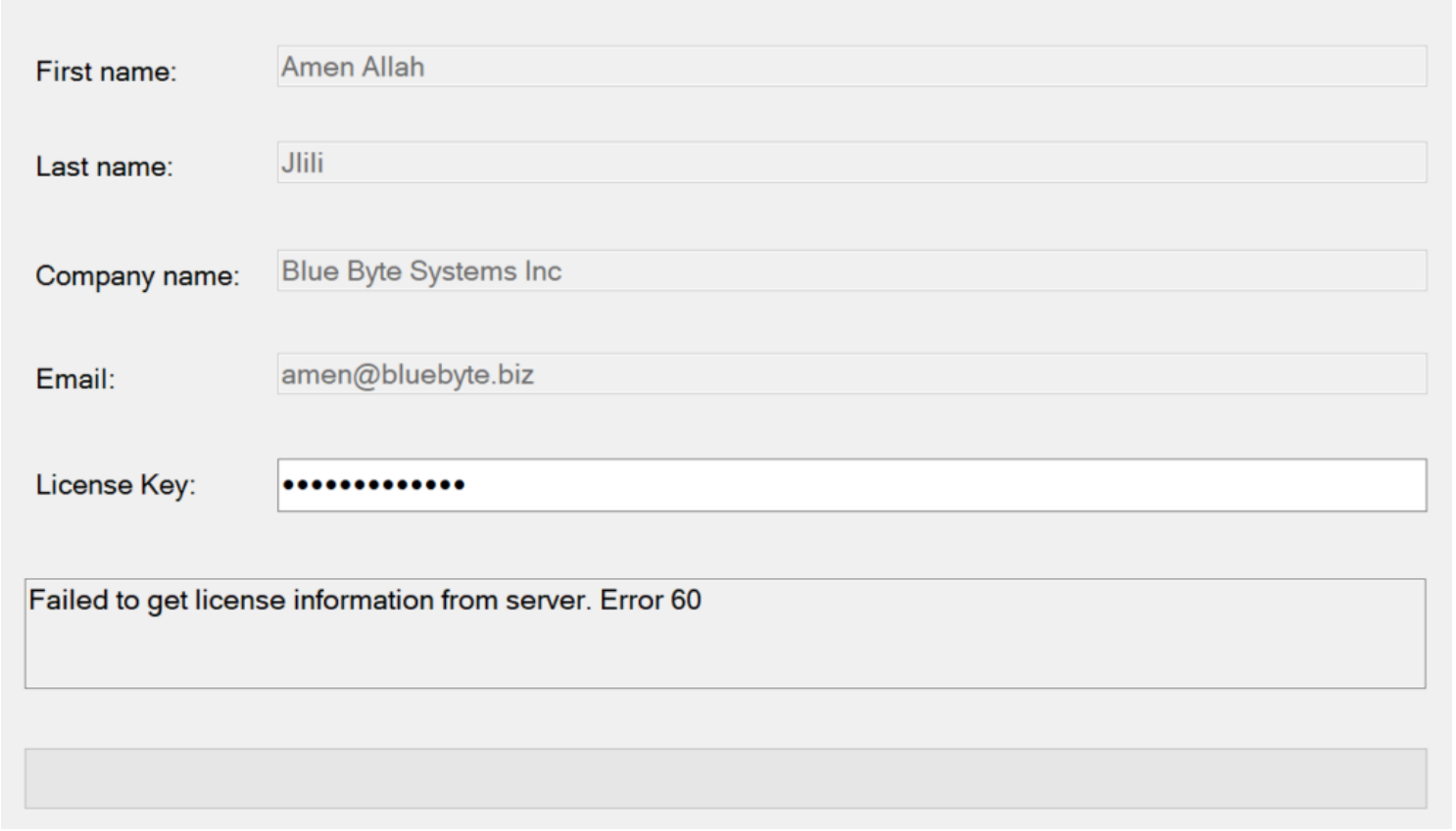
> ⊗ **IMPORTANT**
> Do not commence the process below until you have your license key.

1. *Open* the PDM Administration tool.
2. *Expand* the Add-in nodes and *right-click* on PDM2Excel.

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**



To solve this issue:

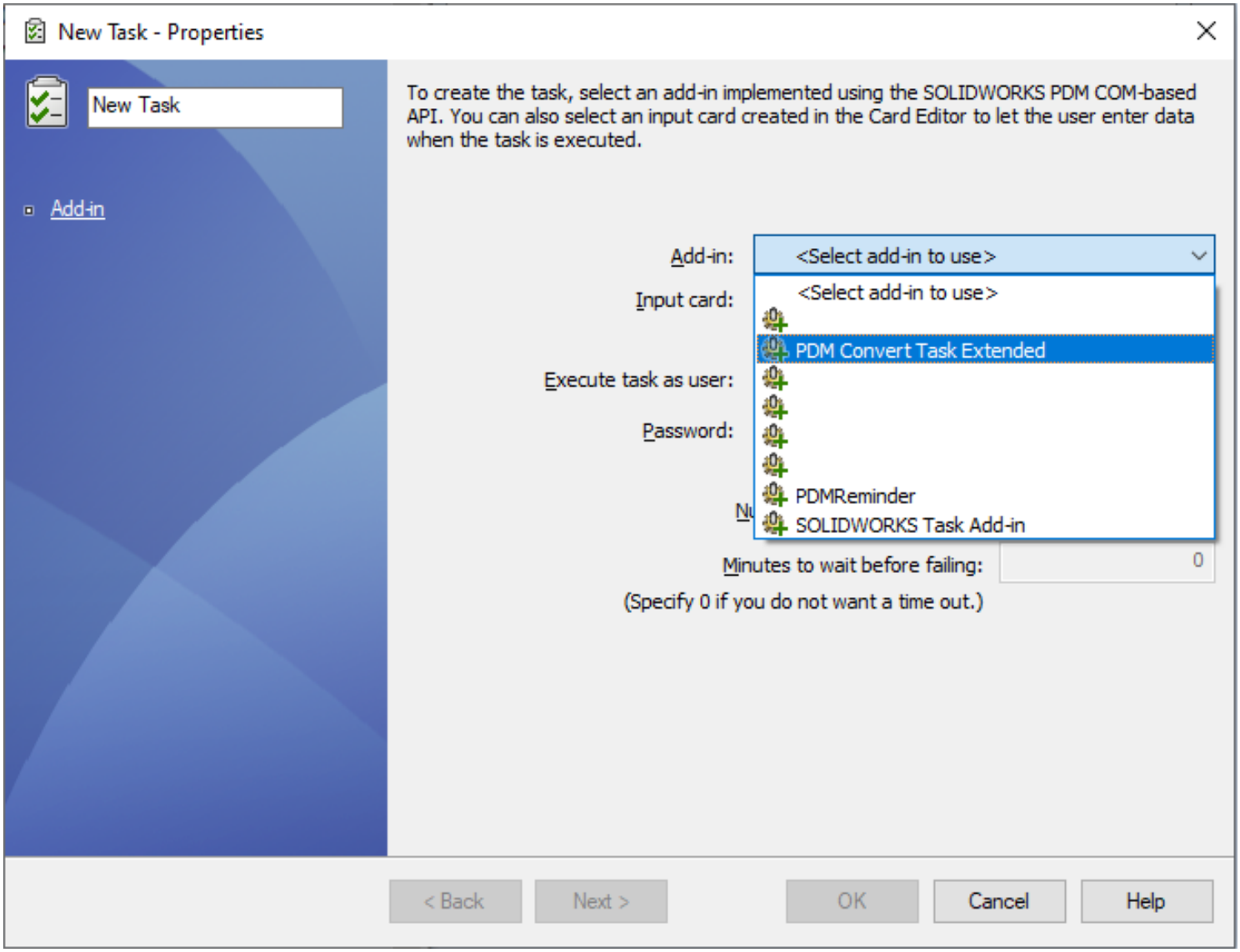
1. *Close* the ***Manage license...*** window.
2. *Right-click* on the add-in and *click* ***Manage license...***
3. *Add* your license key to the ***License Key*** field.
4. *Click* ***Activate*** to consume your license again.

Setting your task

This section will detail the setup pages that require explanation.

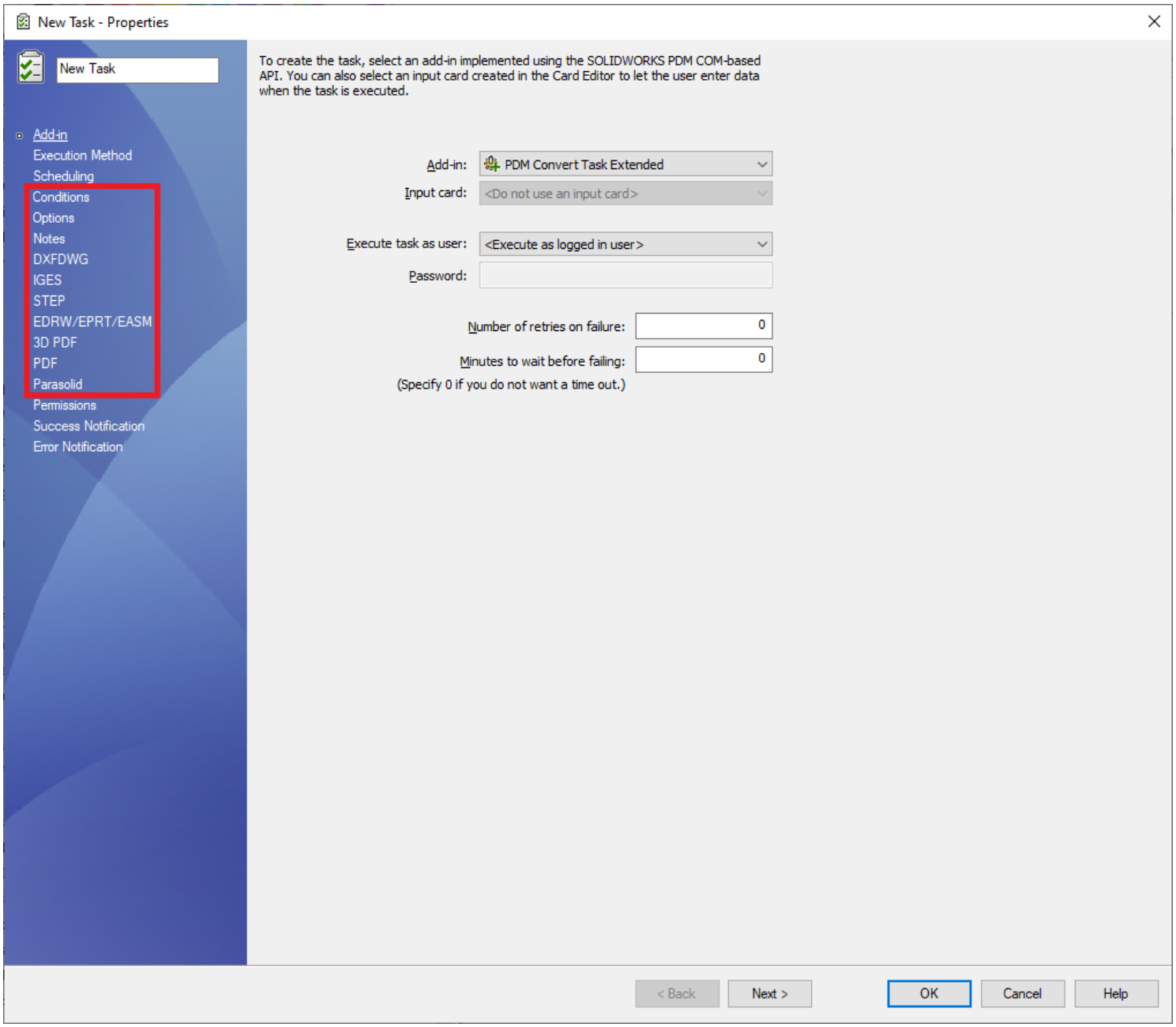
When you create a new task, please choose PDM2Excel from the dropdown in the first page of the task setup dialog like below:

TODO: Add PDM2Excel image



Setup pages

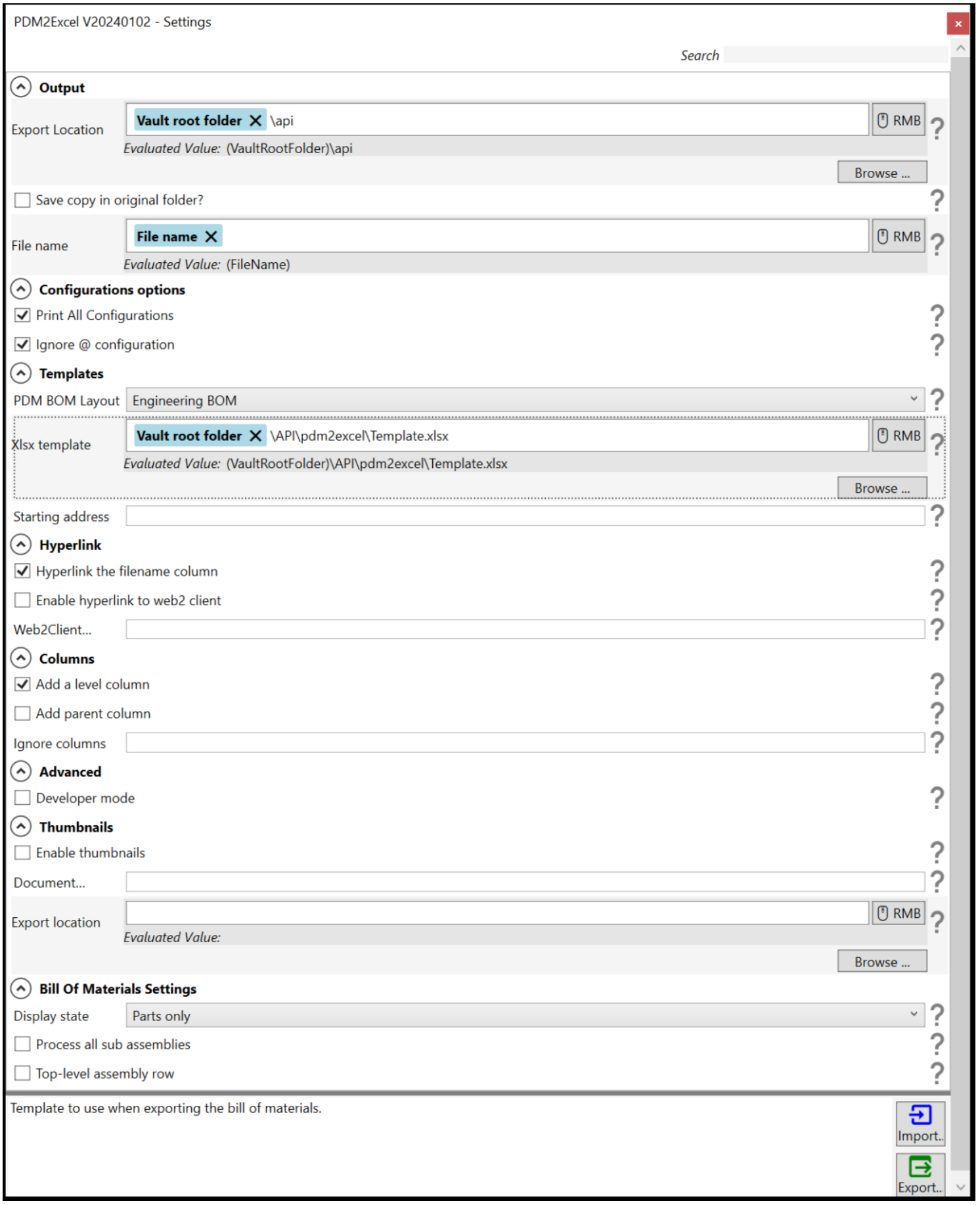
TODO: Add PDM2Excel image



Tab	Description
Settings	The Settings page define the export settings of what information is pulled from the assembly into the BOM.

Options

The Options setup tab allows you to define the characteristics of the BOM you would like to export.


PDM2Excel V20240102 - Settings
Search
Output
Export Location
Vault root folder
\api
RMB
Evaluated Value: (VaultRootFolder)\api
Browse ...
Save copy in original folder?
File name
File name
RMB
Evaluated Value: (FileName)
Configurations options
Print All Configurations
Ignore @ configuration
Templates
PDM BOM Layout
Engineering BOM
Xlsx template
Vault root folder
\API\pdm2excel\Template.xlsx
RMB
Evaluated Value: (VaultRootFolder)\API\pdm2excel\Template.xlsx
Browse ...
Starting address
Hyperlink
Hyperlink the filename column
Enable hyperlink to web2 client
Web2Client...
Columns
Add a level column
Add parent column
Ignore columns
Advanced
Developer mode
Thumbnails
Enable thumbnails
Document...
Export location
RMB
Evaluated Value:
Browse ...
Bill Of Materials Settings
Display state
Parts only
Process all sub assemblies
Top-level assembly row
Template to use when exporting the bill of materials.
Import..
Export..

Option	Description

Export Location	Specify a location where to export the xlsx BOM. Right-click on the RMB to insert dynamic variables into the path.
	
	For example, to export your bill of materials to a location in the vault, you can use the vault root folder dynamic variable. The add-in will evaluate it to the actual path of the local vault view where the export operation will be executed.
	The list of dynamic variables are:
	• Vault root folder
	  ◦ Path to the local vault view root folder
	• File name without extension
	  ◦ Name of the assembly file without extension.
	• File name
	  ◦ Name of the assembly file including the extension (sldasm).
	• Configuration name
	  ◦ Name of the configuration if available.
	  ◦ @ configuration is evaluated to **At**.
	• Revision
	  ◦ PDM Revision of the assembly.
	• Version
	  ◦ PDM Version number of the assembly.
	• Date
	  ◦ The current date time in the following format **yyyy-mm-dd**.
	• Extension
	  ◦ Extension of the affected document.
	• User
	  ◦ Username of the session's user where the export process will be executed.
	• Launching user
	  ◦ Name of the user that launched this operation.
	  ◦ Please use this only if the add-in is configured to be used as a task.
	• PDM Variables
	  ◦ Value of the PDM Variable for the affected documents.
	  ◦ Please make sure the Variable name does not contain any illegal path characters.

Save copy in original folder?	If the checkbox is checked, the task will save the xlsx BOM in the folder of the original document.

Option	Description
File name	The name of the exported xlsx.

Configuration options	• Print all configurations
	  ◦ Print all the configurations.
	• Ignore @ configuration
	  ◦ Ignores the @ configuration

Templates	• PDM BOM Layout
	  ◦ The name of the BOM layout to use
	• Xlsx template
	  ◦ Use this if you want to include your company header in the exported bill of materials
	• Start address
	  ◦ The address where the add-in will add the BOM data.
	  ◦ By default, this is 1:1 (i.e. row one and column one or cell A1) but this will change depending on your template.

Hyperlink	• Hyperlink the filename column
	  ◦ Adds a conisio link that directly opens the row's affected document in file explorer.
	  ◦ This does not apply to weldment rows.
	• Enable hyper to web2client
	  ◦ Adds a hyperlink to the filename that opens the row's associated document in the web2 client interface (PDM in the browser).
	• Web2client
	  ◦ Base URL of your web2client

Columns	• Add level column
	  ◦ Add a level column.
	  ◦ Use this when the BOM display style is set to be indented.
	• Add parent column
	  ◦ Add the parent column to the bill of materials.
	• Ignore columns
	  ◦ Name of the columns to ignore.
	  ◦ Separate column names with **;** (Column1;Column2;etc...).

Developer mode	• Adds advanced error message for debugging.

Option	Description
	• Only use this when directed by tech support.
Thumbnails	• You need the document key manager to be able to use this feature. Request from the ? button. • Export location ◦ Specify the export location where you want to save the thumbnails as separate pngs.

Bill of Materials Settings	• Display state
	  ◦ Intended
	  ◦ Parts only
	  ◦ Top level
	• Process all sub-assemblies
	  ◦ Process all sub-assemblies into separate bill of materials
	• Top-level assembly row
	  ◦ Add the top-level assembly as the 0th row.

NOTE

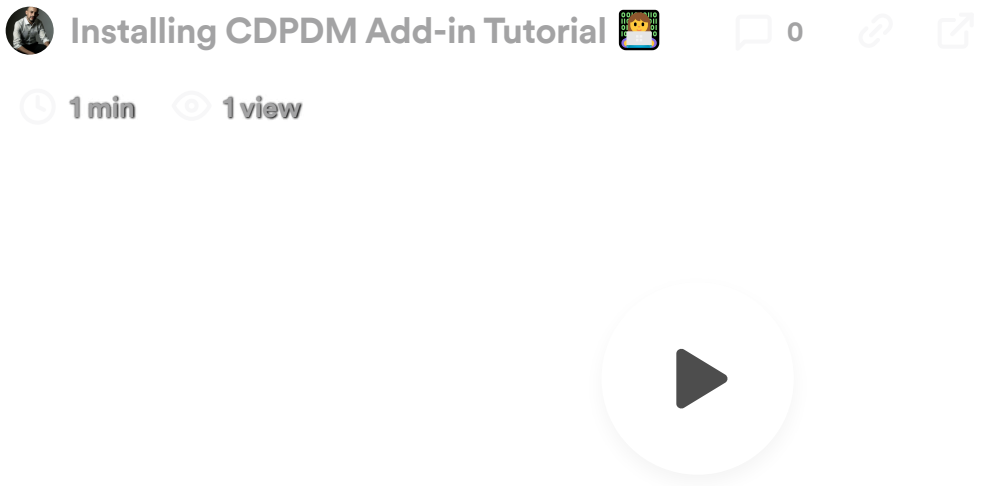
The Export and Import button allows you to save your settings and import them after upgrading. Only use them with task setup.

Need more help?

If you require help, please reach out to us from the **contact page**.

Continuous Delivery

> **NOTE**
> This is only available for consulting projects. Our product line has its own CD pipeline.



CDPDM is a PDM add-in by Blue Byte Systems Inc. that facilitates the deployment of PDM and task add-ins developed for you.

The add-in communicates with our servers and allows the installation and uninstallation of all versions of your PDM add-ins.

Advantages

The advantages of using CDPDM are numerous:

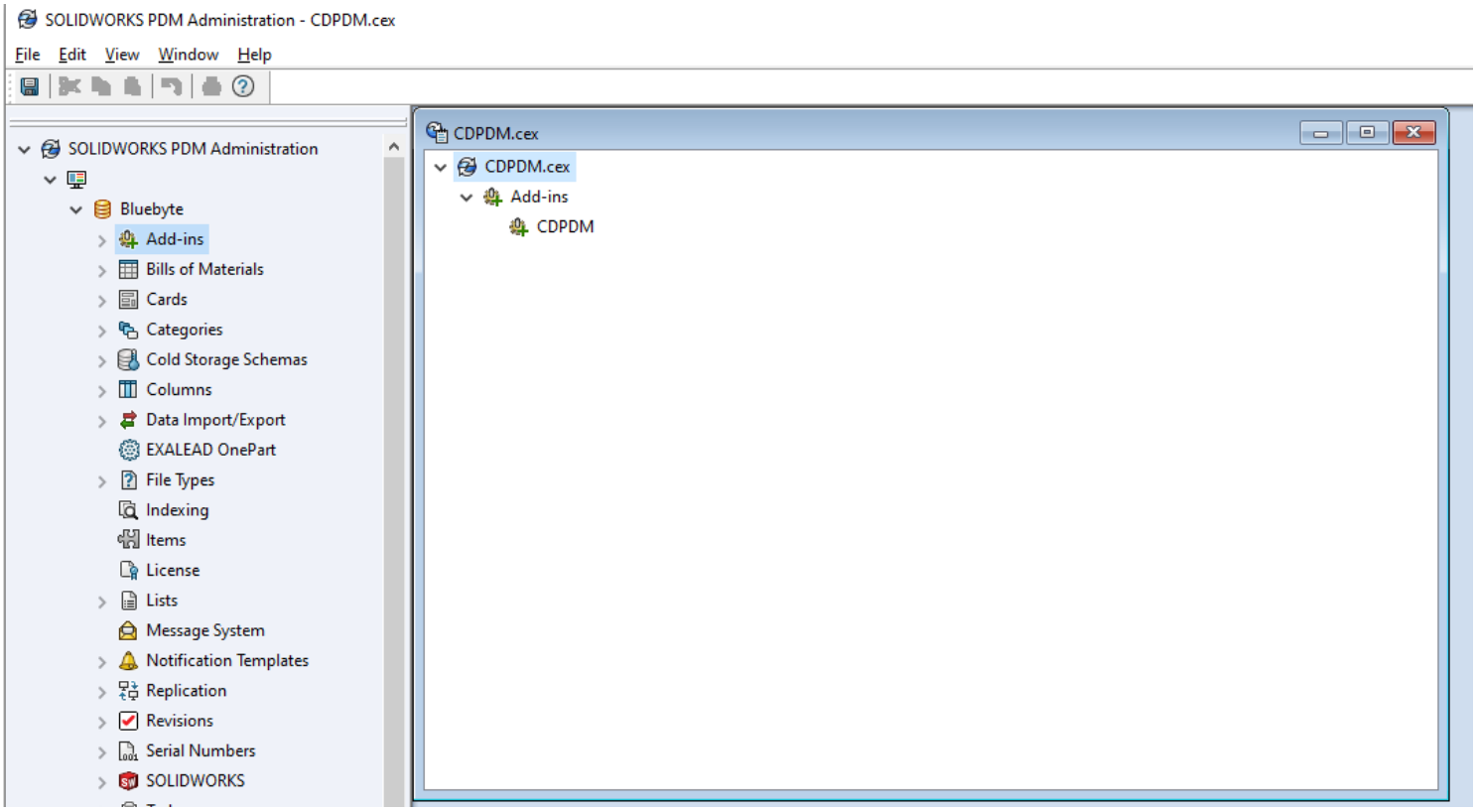
- ✔ No need to ask for or download CEX files.
- ✔ Ability to switch between versions.
- ✔ The conventional process of installing and updating add-ins is very tedious and time-consuming.

Where to Find CDPDM

- CDPDM is provided in your project kick-off email.
- The email contains:
  - Link to the CEX file.
  - Link to this page with installation instructions.
  - Link to your Customer Configuration File.

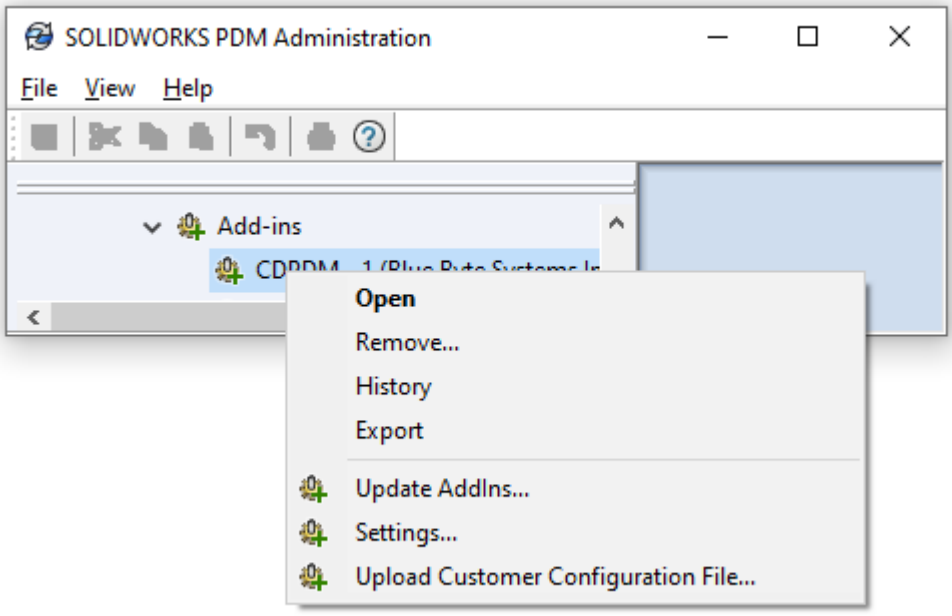
How to Install

- Start by downloading the CEX file.
- In Windows 11, 10, and 7, internet downloads are blocked. Right-click on the CEX file, go to Properties, check Unblock, then click Apply and OK.
- Open the Administration tool.
- Log in to the vault. Please ensure you use a PDM user with Edit Add-Ins permission.
- In the Administration tool, click File > Open and browse to the `CDPDM.cex` file.
- Drag and drop the add-in from the CEX window onto the Add-ins node and wait for a few moments for CDPDM to be installed.



Configuration

- Start by downloading the Customer Configuration File from the project kick-off e-mail.
- You can upload the Customer Configuration File via the Administration tool.
- Right-click on the add-in and click Upload Customer Configuration File...
- Browse to the Customer Configuration File.

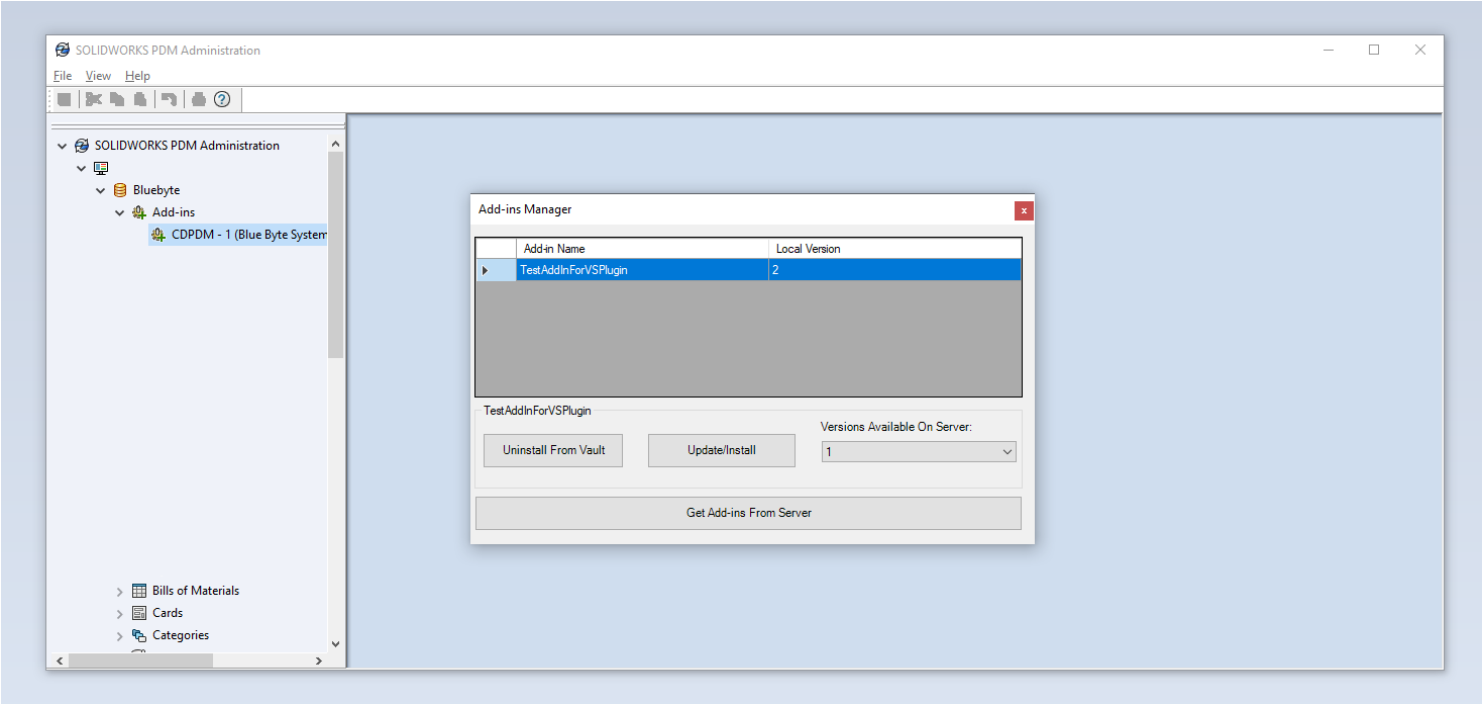


NOTE

You can configure the settings of CDPDM by adding the credentials of the Customer Configuration File manually. Contact support for help.

Updating Add-ins

- Right-click on CDPDM under Add-ins in the Administration tool and click Update Add-ins...
- This process may take a few moments depending on how many add-ins are in your vault.
- You will be prompted with a window like the following:



You can:

- Install the selected add-in from the list. From the *Versions Available On Server* dropdown, you can select which version to install.
- Uninstall the selected add-in from the vault (if it is installed).

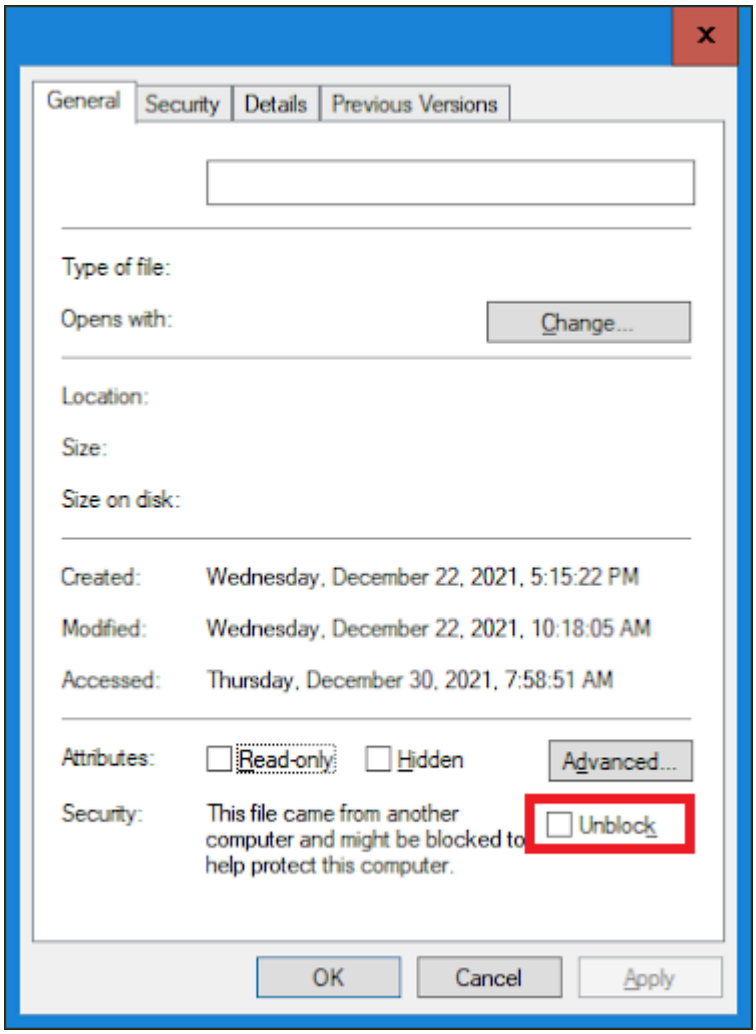
The installation process will ask you if you want to restart PDM. This may be beneficial to do after every upgrade, especially if you're validating a feature.

> **NOTE**
>
> Please allow for a few moments after you click Install/Update. The add-in will be downloaded unblocked and added to the vault. This operation includes suppressing some PDM dialog boxes.

Troubleshooting SOLIDWORKS PDM Add-ins

Q1: My SOLIDWORKS PDM add-in is not loading. How do I troubleshoot this?

A1: If your SOLIDWORKS PDM add-in fails to load, follow these troubleshooting steps:



1. **Ensure file is not blocked by Windows:**

   Files can be blocked by Windows as a security measure primarily to protect your computer from potentially harmful content that may come from external sources, such as the internet or another computer. The main reasons files are blocked include:

   1. **Downloaded from the Internet:**

      - Files downloaded from the internet are often marked as blocked by default. This is to prevent automatic execution of potentially malicious scripts or applications that could harm your system.
   2. **Attachment in Emails:**

- Email attachments, especially those from unknown or untrusted sources, may also be blocked to prevent inadvertent opening or execution of harmful content.

3. **Copied from External Sources:**
   - Files copied from removable media (like USB drives) or network shares may inherit their blocking status from the source, especially if the source is considered untrusted or comes from a different security zone.
4. **Security Settings:**
   - Windows applies security settings to files based on their origin and attributes. This includes marking files with a zone identifier (e.g., from the internet) which triggers the blocking mechanism.

▶ Steps to Unblock Files in File Explorer Properties