HELiOS

UNLIMITED PLM PERFORMANCE **DEVELOPED BY ISD**

HELiOS - What's new?

Version 2018

News Overview

Date of issue: 30/10/2018

isdgroup.com

I·S·D

THE WORLD OF CAD AND PDM SOLUTIONS

TOC

HELiOS Desktop **7**

Service Pack 2, Patch 1 2018 (V 2302.1) **7**

Remote Maintenance via TeamViewer 7

Service Pack 2 2018 (V 2302) **9**

Combined search: Filter options for Documents or Articles without Links 9

Result list settings for Combined search 10

Enhanced model structure representation 11

Result lists: Marking of new indices 12

Items combined into sets: Enhanced context menu 13

Detail dialogues in Windows task bar 13

Service Pack 1 2018 (V 2301) **15**

Performance 15

Product structure: Switch item 15

Attribute configuration for Model items 15

New date selection 16

Result list button for opening of documents 17

Major Release 2018 (V 2300) **18**

Editing of combined items 18

New attribute mapping configuration for document input via Drag & Drop 19

HELiOS Spooler **20**

Service Pack 2 2018 (V 2302) **20**

DSTV-NC-Export 20

Service Pack 1 2018 (V 2301) **21**

New module structure 21

HELiOS MS Office Interface **22**

Service Pack 2 2018 (V 2302) **22**

Project and folder data input 22

Major Release 2018 (V 2300) **23**

New HELiOS Workspace 23

Open documents for editing or in read-only mode 24

HELiOS CAD/CAE Integrations **25**

Service Pack 2 2018 (V 2302) **25**

Open documents via Drag & Drop 25

Service Pack 1 2018 (V 2301) **26**

HELiOS interface to Autodesk Navisworks 26

Major Release 2018 (V 2300) **27**

New module structure 27

HELiOS in HiCAD **28**

Service Pack 2 2018 (V 2302) **28**

Semi-finished Product Article as Sub-item 28

Service Pack 1 2018 (V 2301) **28**

Performance 28

HELiOS for AutoCAD **29**

Service Pack 2 2018 (V 2302) **29**

AutoCAD 2019 29

Major Release 2018 (V 2300) **30**

Project and Folder data input options added in HELiOS menu 30

HELiOS for Autodesk Inventor **31**

Service Pack 2 2018 (V 2302) **31**

Revised menus and dialogues, new options 31

"New in HELiOS", Derive model structure and editing status for active part 33

Batch import 34

Apply server state 35

Support of dependent parts, parameter references and 3rd party references 36

Product structure transfer 36

Management of Inventor standard parts in HELiOS 36

Service Pack 1 2018 (V 2301) **38**

Inventor 2019 38

Performance 38

Edit (All) 38

Update properties 38

New in HELiOS: Recognition of already transferred documents 39

Enhanced attribute mapping 39

Folder attributes in title blocks 39

Major Release 2018 (V 2300) **40**

New in HELiOS 40

New options for derivations via CAD structure 40

Model structure display in detail masks and in the HELiOS Desktop 41

Project and Folder input functions on HELiOS Ribbon tab 42

Editing of documents - Check in (All) / Cancel (All) 42

Subsequent and multiple linking of articles 43

Notes on attribute mapping 43

HELiOS for SOLIDWORKS **44**

Service Pack 2 2018 (V 2302) **44**

SOLIDWORKS 2019 44

Product structure transfer: Documents without article assignment 44

Major Release 2018 (V 2300) **45**

New options for derivations via CAD structure 45

Project and Folder input functions on HELiOS Ribbon tab 46
Editing of documents - Check in (All) / Cancel (All) 47
Select configuration when opening documents 47
Further enhancements of the user interface 48

HELiOS Desktop

Service Pack 2, Patch 1 2018 (V 2302.1)

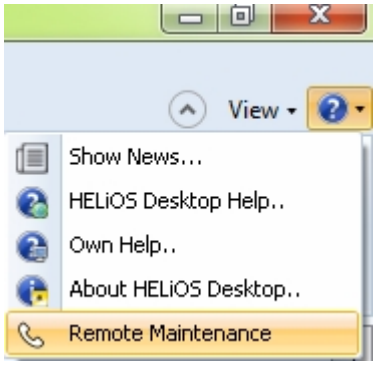
Remote Maintenance via TeamViewer

When you install HELiOS, the new Support tool **TeamViewerQS.exe** will now automatically be installed.

In case of problems that require support by the ISD Group, you have the option to call the **TeamViewer** tool from the HELiOS Desktop. This tool enables you to request remote access to your computer by the support team of the ISD.

Please note that you should only use this option if you have been requested to do so over the phone by staff members of our Helpdesk.

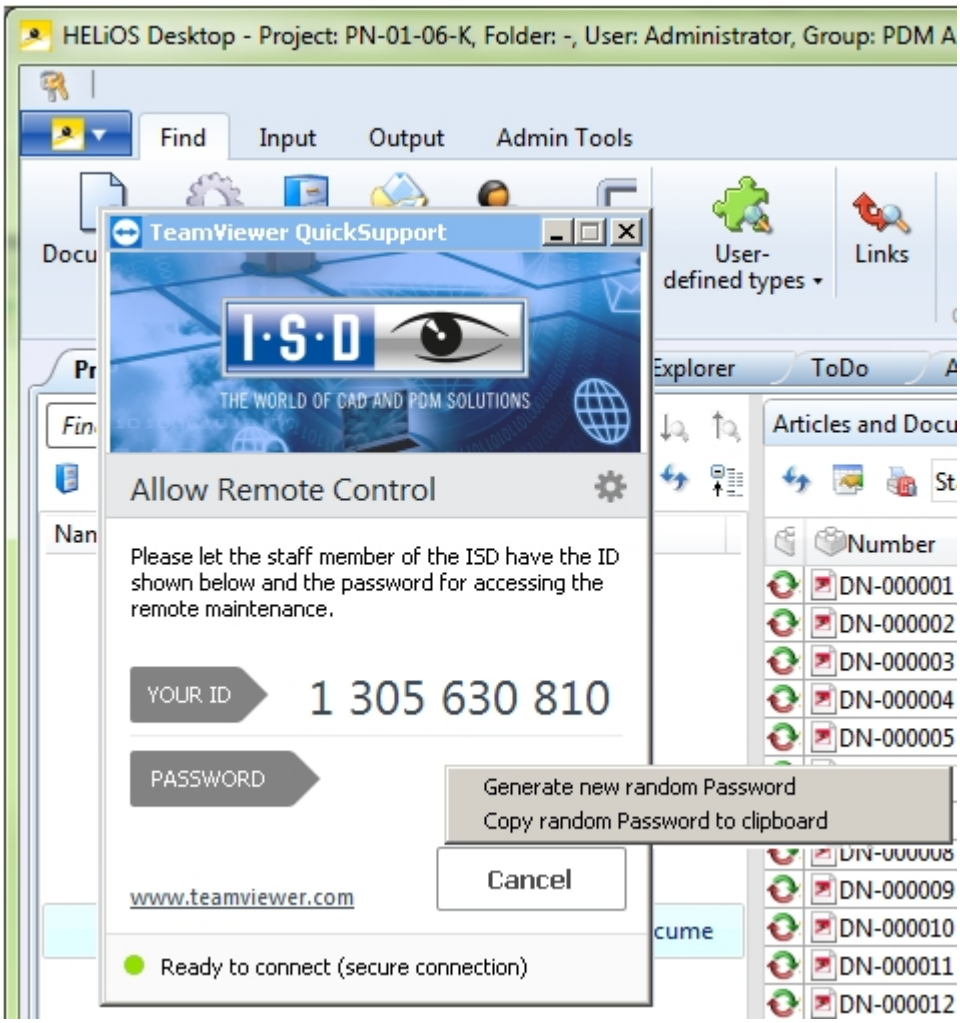
Click the icon at the top right of the HELiOS Desktop screen and choose **Remote Maintenance**.



Then, you need to confirm the Windows security prompt, asking you whether you want to allow changes to your system by the tool.

The TeamViewer will then automatically generate an **ID** and a **Password**, which may take some seconds.

Let the support team member of the ISD Group have the ID and the Password to allow the remote access to your computer.



Further information on the TeamViewer can be found on the relevant website.

Important notes on using the Remote Maintenance tool and on protection of your data:

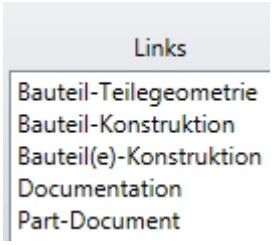
- To be able to use Remote Maintenance you require an active online connection.
- During the Remote Maintenance you can see what we do on your computer.
- With the ID and the Password that you give to our Helpdesk, remote access to your computer will only be possible once.
- All data, information or other knowledge that our Helpdesk obtains during the Remote Maintenance session, will neither be disclosed on third parties, nor used in any different way by us.
- The TeamViewer is a product of the TeamViewer GmbH, Jahnstr. 30, 73037 Göppingen, Germany, Phone: +49 (0)7161 60692 50, E-mail: service@teamviewer.com. Further information on the TeamViewer can be found on the website of the manufacturer of TeamViewer. There you can also find all required information on the topic of data security.
- Please also read the Notes on Data Protection by the ISD.

By contacting our Helpdesk via the **Remote Maintenance** you confirm that you have read and understood the above notes.

Service Pack 2 2018 (V 2302)

Combined search: Filter options for Documents or Articles without Links

The behaviour of the **Combined search** function has been modified: If you deactivate all link classes for the search, i.e. nothing has been selected in the field beneath **Links**, all objects matching the entered search criteria that are not linked to any other object will be shown in the corresponding result list.



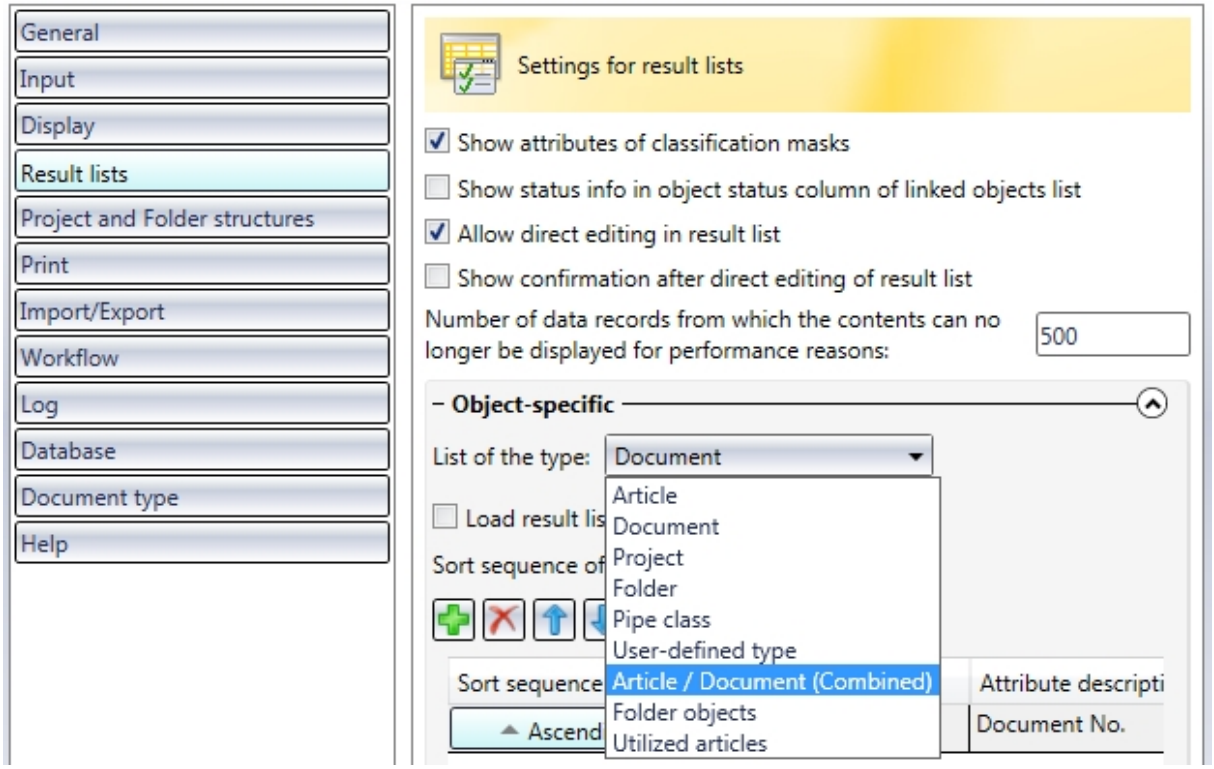
In this way you can, for instance, list documents of already deleted articles in conjunction with other, attribute-related search criteria, e.g. in order to link, move or delete them.

Furthermore, you can search for articles without assigned drawing in order to determine for large assemblies whether drawings have been created for all related parts, or whether parts have been "overlooked" by mistake.

Result list settings for Combined search

Beneath **Object-specific** on the **Result lists** tab of the **HELiOS Options** dialogue window you can find a new pull-down menu item called **Document and Article**.

This setting is for the **Combined search** function. It allows you, for instance, to display the result lists of a combined search sorted by document numbers in ascending order by default.



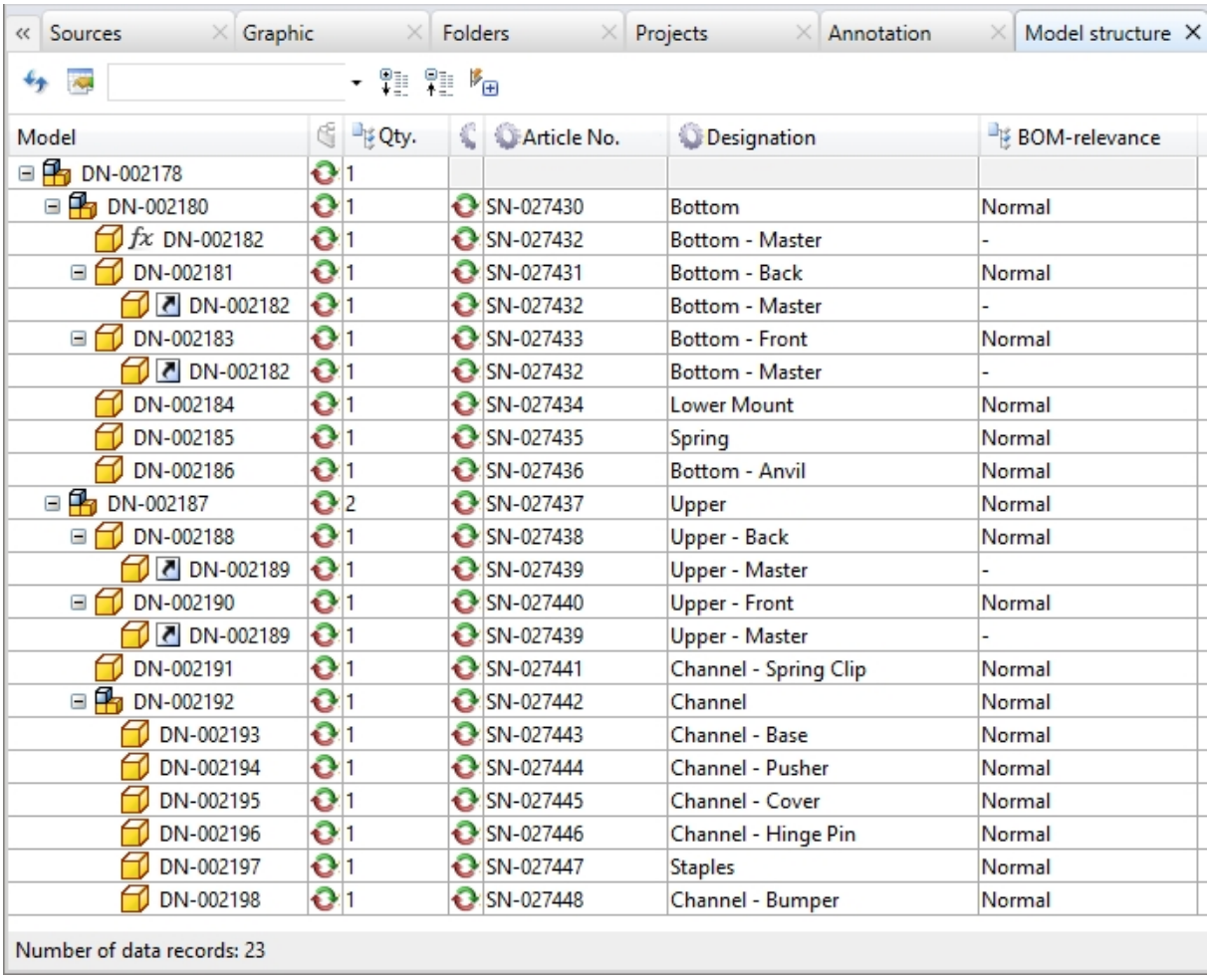
Enhanced model structure representation

The **Model structure** representation in Document detail masks has been enhanced.

Icons in the tree structure indicate the model type (part, assembly...) and dependent parts are also marked as such.

Also, it is indicated for each Inventor-related item whether it is a "regular" Part / Assembly, a parameter reference or a third party reference.

Multiple occurrences of items are indicated in the **Qty.** column.



Model	Qty.	Article No.	Designation	BOM-relevance
DN-002178	1			
DN-002180	1	SN-027430	Bottom	Normal
DN-002182	1	SN-027432	Bottom - Master	-
DN-002181	1	SN-027431	Bottom - Back	Normal
DN-002182	1	SN-027432	Bottom - Master	-
DN-002183	1	SN-027433	Bottom - Front	Normal
DN-002182	1	SN-027432	Bottom - Master	-
DN-002184	1	SN-027434	Lower Mount	Normal
DN-002185	1	SN-027435	Spring	Normal
DN-002186	1	SN-027436	Bottom - Anvil	Normal
DN-002187	2	SN-027437	Upper	Normal
DN-002188	1	SN-027438	Upper - Back	Normal
DN-002189	1	SN-027439	Upper - Master	-
DN-002190	1	SN-027440	Upper - Front	Normal
DN-002189	1	SN-027439	Upper - Master	-
DN-002191	1	SN-027441	Channel - Spring Clip	Normal
DN-002192	1	SN-027442	Channel	Normal
DN-002193	1	SN-027443	Channel - Base	Normal
DN-002194	1	SN-027444	Channel - Pusher	Normal
DN-002195	1	SN-027445	Channel - Cover	Normal
DN-002196	1	SN-027446	Channel - Hinge Pin	Normal
DN-002197	1	SN-027447	Staples	Normal
DN-002198	1	SN-027448	Channel - Bumper	Normal

Number of data records: 23

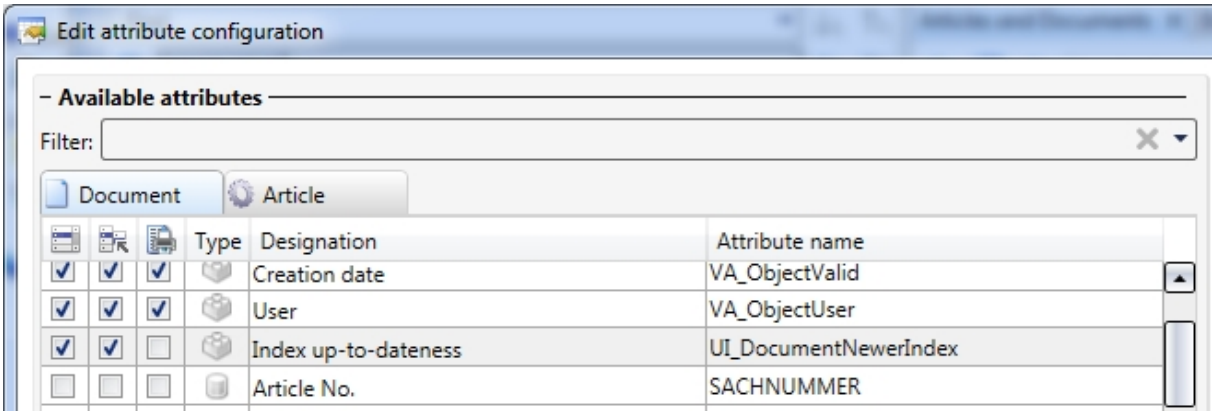
Please note:

To ensure a correct result list representation of the model structure, the Article context of the top part must be unambiguous!

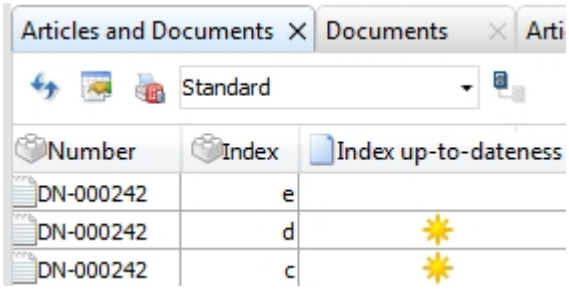
The Article context of the sub-parts is determined by the saving in the CAD system.

Result lists: Marking of new indices

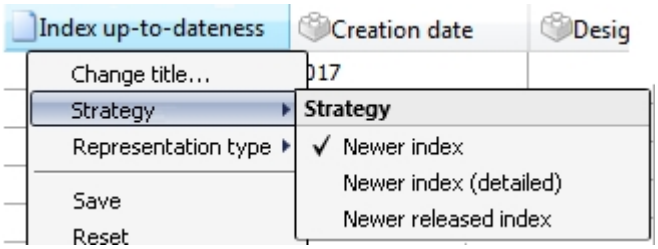
In the result list configuration you can find the new **Index up-to-dateness** attribute ("UI_DocumentNewerIndex" for documents, "UI_ArticleNewerIndex"for articles):



If an Article or a Document has a newer index, older indices will be indicated in the **Index up-to-dateness** column with a star symbol:



Right-clicking the title of the **Index up-to-dateness** opens a context menu. The menu item **Strategy** allows you to choose between three different additional display options:



- **Newer index**: The symbol indicates that a newer index exists for the listed object, i.e. that the index of the listed object is not up to date.
- **Newer index (detailed)**:If the object is marked with the symbol, a higher (newer) index exists, but no newer released version of the object. The symbol indicates that higher and released indices exist for the listed object, but that the highest index has not been released yet. If a result list entry is marked with the symbol, this indicates that a version with a higher index with Workflow status "Released" exists.
- **Newer released index**: If a result list entry in the **Index up-to-dateness** column is marked with the symbol, this indicates that a higher index with Workflow status "Released" exists.

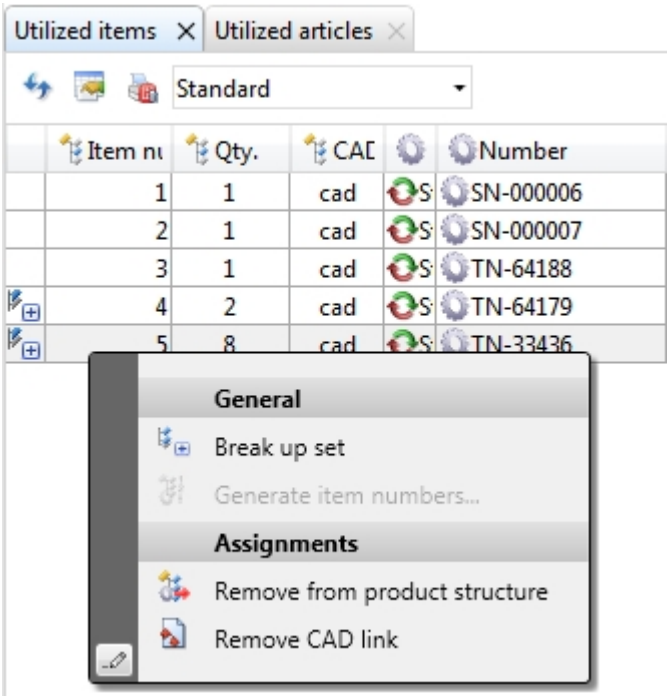
A simple click on the star in the result list opens the **Version Management** for the corresponding object, a double-click will additionally open the Document / Article detail mask.

Whether only current or all indices are to be displayed in the result lists can be specified in the **HELiOS Options** at **Result lists > Show objects**.

Items combined into sets: Enhanced context menu

For the editing of items that have been combined into sets you can find an extended context menu that does not only consider the combined set of items, but also offers the option to edit the individual items.

For instance, you can delete items from the product structure, or remove the CAD link if desired.



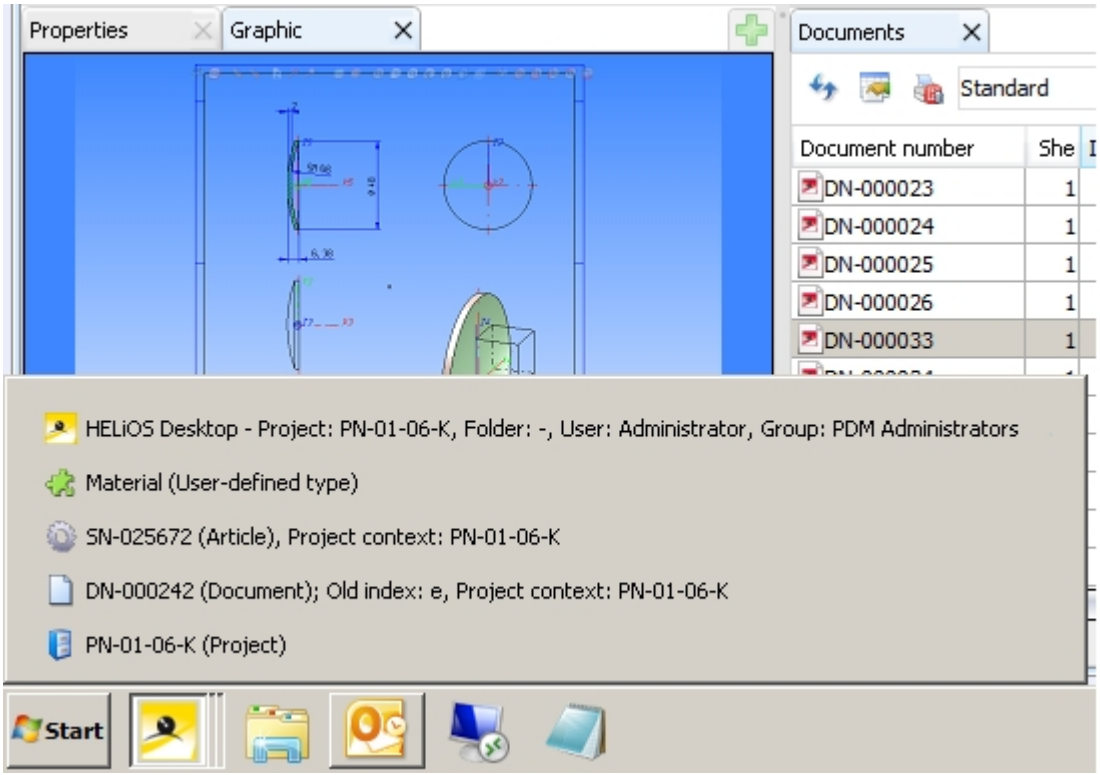
Detail dialogues in Windows task bar

Detail dialogue windows of HELiOS are shown as minimized windows in the Windows task bar.

Each of the different object types (Article, Document, Project, Folder, User-defined type) is represented by a corresponding icon. In the text line next to the icon the name of the object is shown (e.g. the document number).

If an object from the result list of a Folder Explorer or Project Explorer has been opened, the Folder context or Project context, respectively, will also be shown, accordingly.

Also, older indices of the corresponding object will also be indicated.


Properties
Graphic
Documents
Standard
Document number
She
DN-000023
DN-000024
DN-000025
DN-000026
DN-000033
HELiOS Desktop - Project: PN-01-06-K, Folder: -, User: Administrator, Group: PDM Administrators
Material (User-defined type)
SN-025672 (Article), Project context: PN-01-06-K
DN-000242 (Document); Old index: e, Project context: PN-01-06-K
PN-01-06-K (Project)
Start

Service Pack 1 2018 (V 2301)

Performance

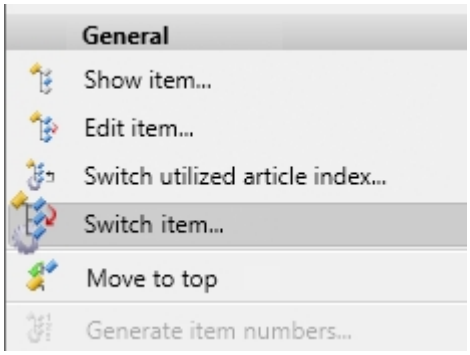
A performance increase of 20 - 30 % could be achieved for the loading and build up of mask elements.

Product structure: Switch item

The context menu for items now contains the new **Switch item** function.

Use this function to switch an article of an item for another item.

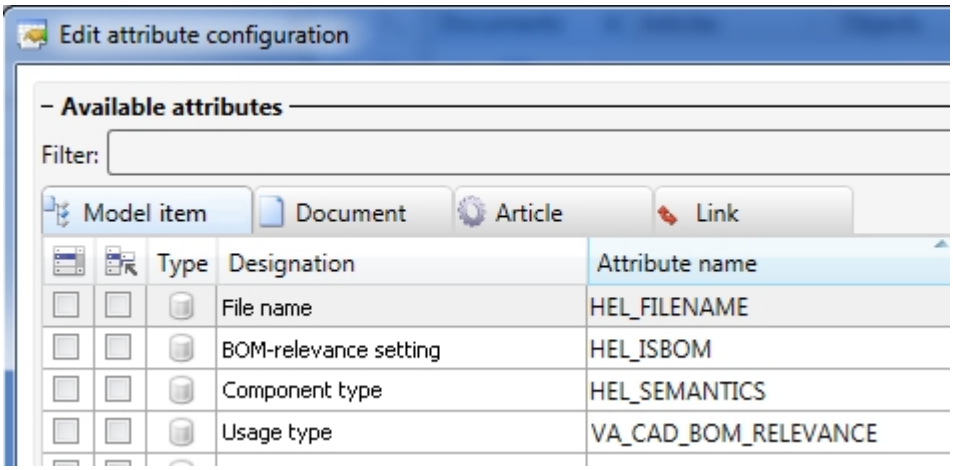
When you call the function the Find article dialogue window will be displayed. Here, choose the required article (a search for a concrete index is also possible here). Confirm to exchange the article.



Please note that the function considers the settings for the **Database** option **Allow updating of released product structures**.

Attribute configuration for Model items

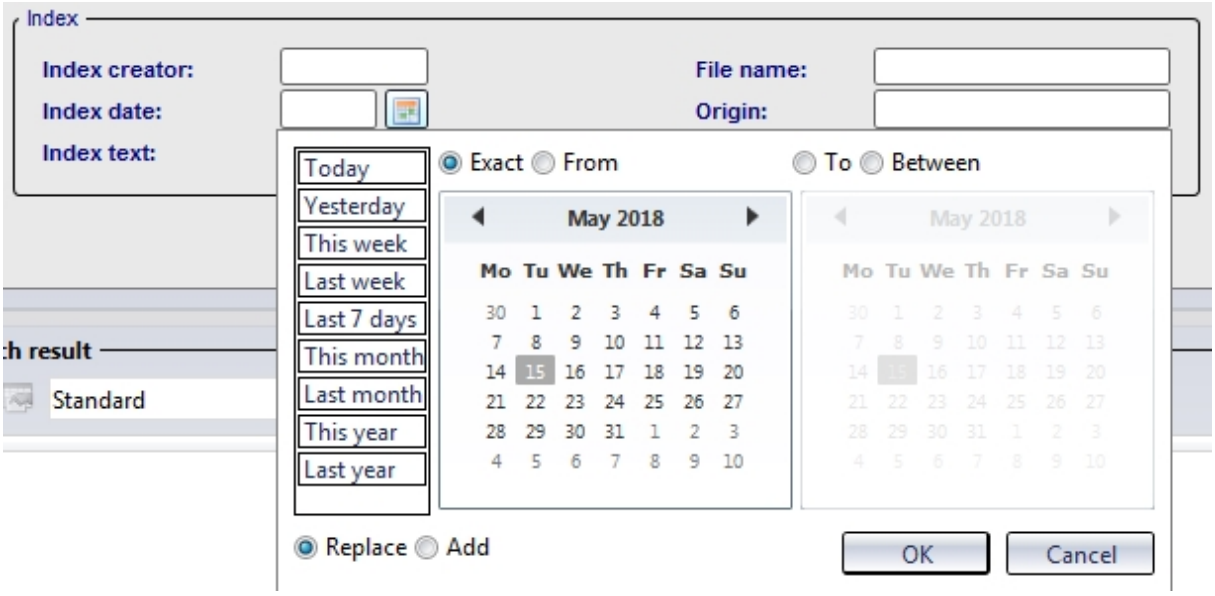
The **Edit attribute configuration** dialogue window for result list configuration on the **Model structure** context of Documents now offers the additional **Model item** tab with model item attributes.



New date selection

The dialogue for data selection, e.g. for the finding or the input of objects, the selection of a particular index date in the result list display etc. comes with a new Look & Feel.

This also includes a menu with extended selection options for a date-based search for objects (e.g. documents, articles, folders).



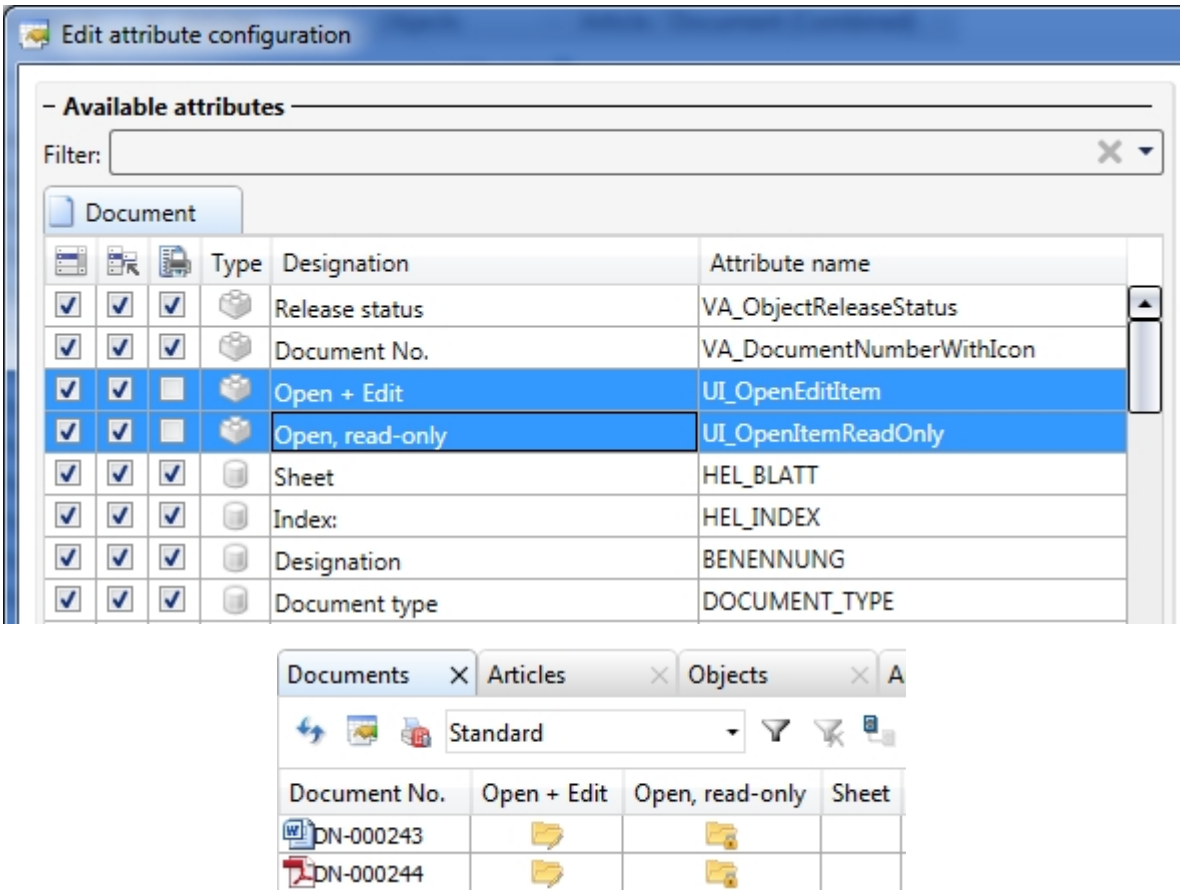
You can also search for objects here that have been created at a particular data and time, or select multiple specific dates.

Furthermore, you can limit your object search to specific creation, index or checking dates or periods.

Result list button for opening of documents

As a faster alternative to a function selection via context menu (right-click and choose function), you have now the option to assign buttons to document result lists, allowing you to open documents in the linked application with one mouse click, either for editing or in read- only mode.

For this purpose the two attributes **UI_OpenEditItem** and **UI_OpenItemReadOnly** have been created, which just need to be activated in the result list configuration.



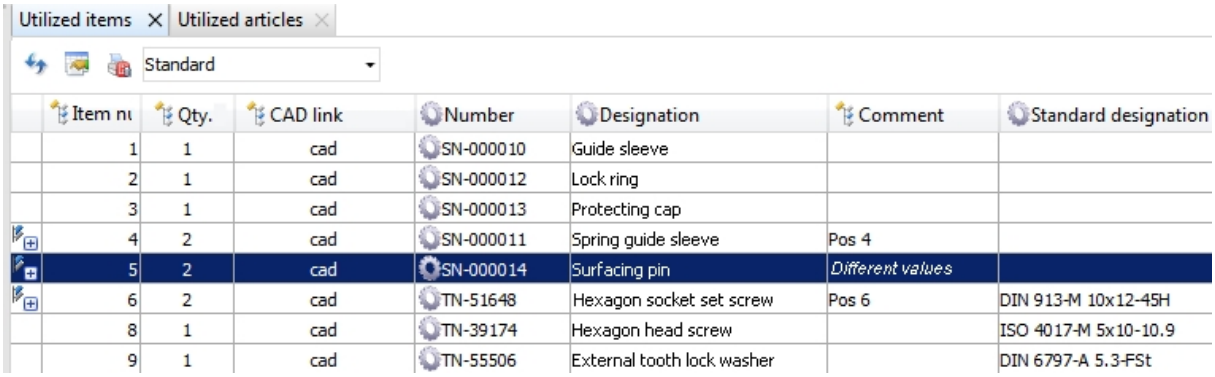
AS of Service Pack 1 these buttons are available in every result list with document context, e.g. in the **Document Class Explorer**, in the **HELiOS Workspace**, in the **Targets** tab of article master masks etc.

Major Release 2018 (V 2300)

Editing of combined items

The attributes of combined items on the Utilized items tab can now be edited in one step if the values of the item attributes are identical.

If this is not the case, the concerned attribute value cannot be edited on the basis of the combined items. For the corresponding combined item the entry "*Different values*" will be shown in the **Comment** column. In such cases the items must be edited individually.

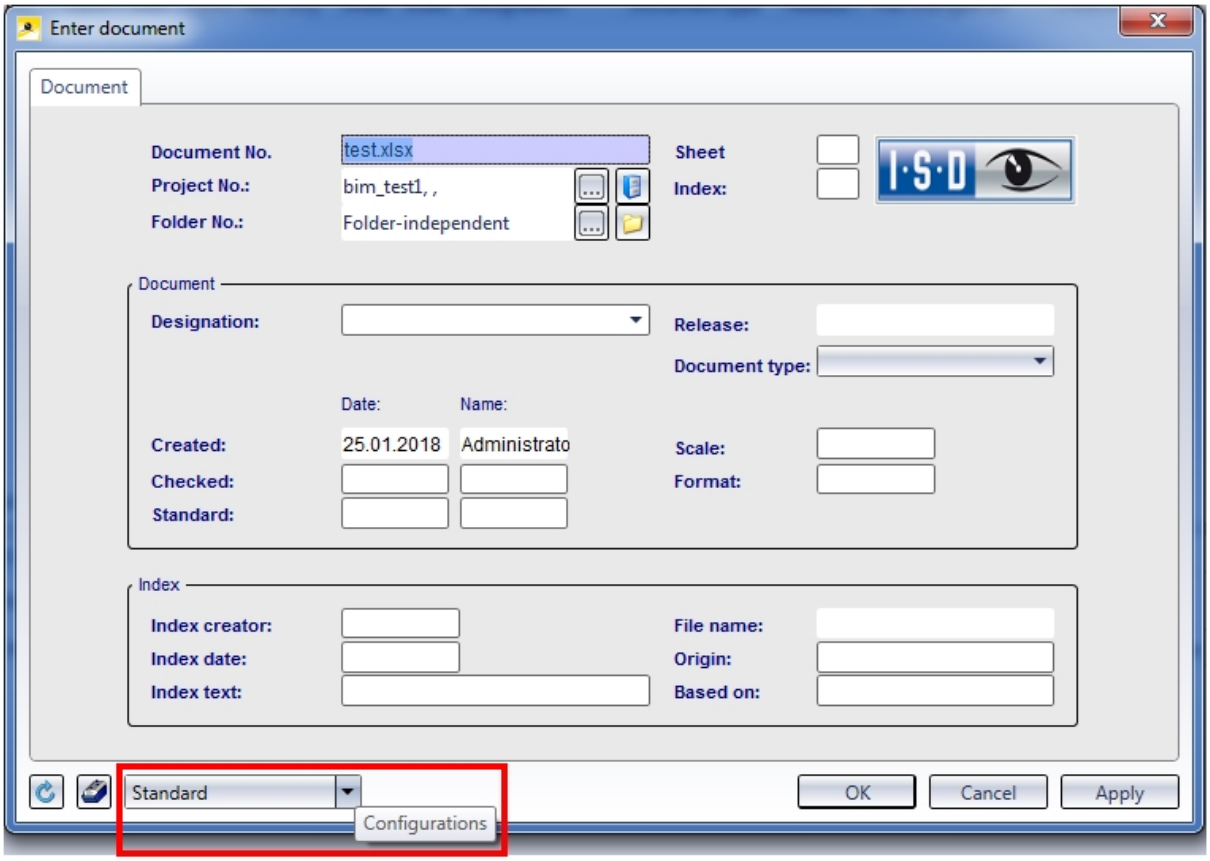


Item nu	Qty.	CAD link	Number	Designation	Comment	Standard designation
1	1	cad	SN-000010	Guide sleeve		
2	1	cad	SN-000012	Lock ring		
3	1	cad	SN-000013	Protecting cap		
4	2	cad	SN-000011	Spring guide sleeve	Pos 4	
5	2	cad	SN-000014	Surfacing pin	*Different values*	
6	2	cad	TN-51648	Hexagon socket set screw	Pos 6	DIN 913-M 10x12-45H
8	1	cad	TN-39174	Hexagon head screw		ISO 4017-M 5x10-10.9
9	1	cad	TN-55506	External tooth lock washer		DIN 6797-A 5.3-FSt

New attribute mapping configuration for document input via Drag & Drop

As for the serial document input in Version 2017 SP2, the attribute mapping is now also controlled via new configuration files for document input via Drag & Drop, i.e. you have the option to individually expand the configuration options for attribute mapping.

When you enter a new document via Drag & Drop, you will now find an additional pull-down menu for attribute mapping configuration at the bottom left of the displayed **Enter document** dialogue window:



If different configuration files have been stored in the system, these will be offered in this pull-down menu. Otherwise, only the **Standard** configuration will be available for selection.

In this way you can assign recurring initialization patterns with only a few mouse clicks, instead of having to set them manually every time.

Please note:

This new procedure replaces the previous configuration file hel_fileattributes.ini. This means that utilized mapping configurations may be renewed since the data from hel_fileattributes.ini will not be used any more.

HELiOS Spooler

Service Pack 2 2018 (V 2302)

DSTV-NC-Export

When converting files via the HELiOS Spooler you can now also choose the DSTV-NC format. The format-specific export options that were last specified and saved in HiCAD will be used in the process.

Service Pack 1 2018 (V 2301)

New module structure

The module structure of the **HELiOS Print and Plot Management** has changed. The following three license modules are available:

- HiCAD Spooler
- HELiOS Spooler
- HELiOS Spooler Client

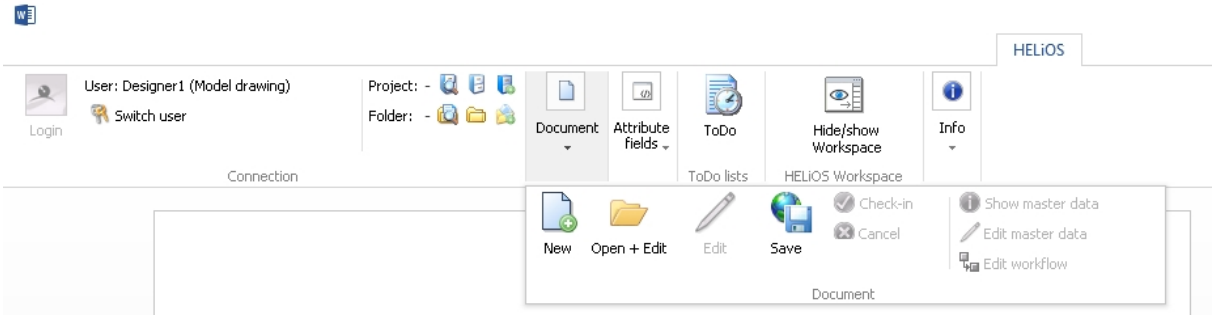
HELiOS MS Office Interface

Service Pack 2 2018 (V 2302)

Project and folder data input

The HELiOS Ribbon tab for Office applications has been further enhanced with functions for the input of new projects and folders.

This allows you to create new projects or folders directly in your Office application (e.g. in Word) and assign the Office documents to them, which spares you the additional step via the HELiOS Desktop.



Major Release 2018 (V 2300)

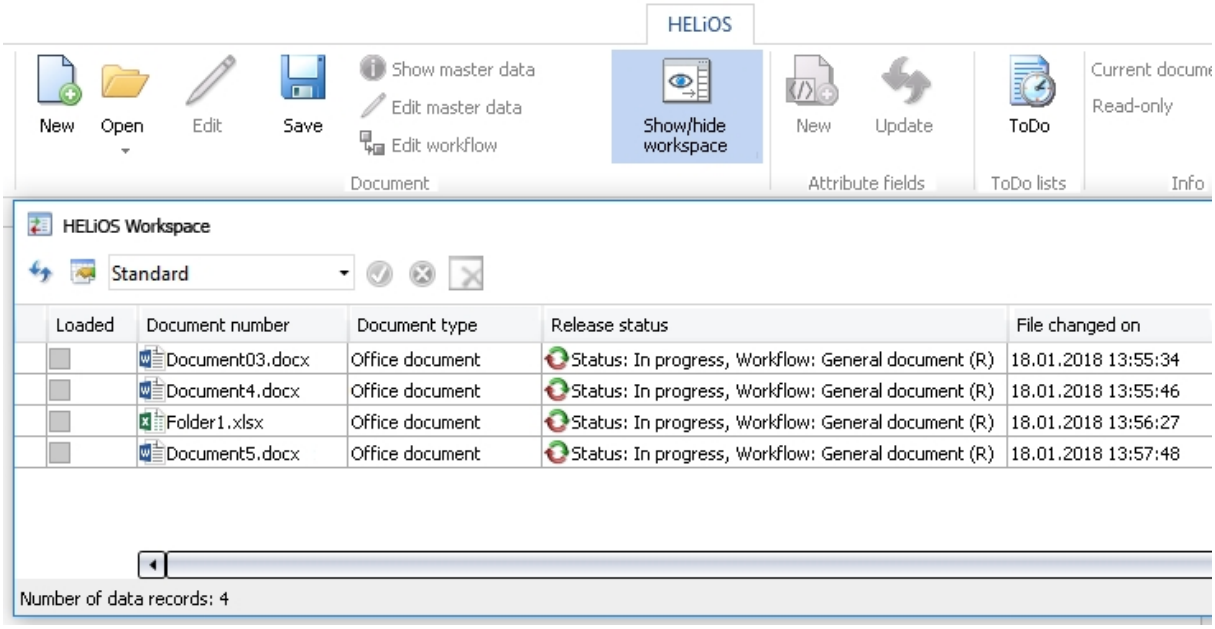
New HELiOS Workspace

All file-based MS Office interfaces (Excel, Word, PowerPoint) now share a common **HELiOS Workspace**, as is already known from the HELiOS -MultiCAD interfaces.

The Workspace provides a clear overview of the locally checked-out files at any time, as well as a direct check-in or cancelling of the corresponding file edits.

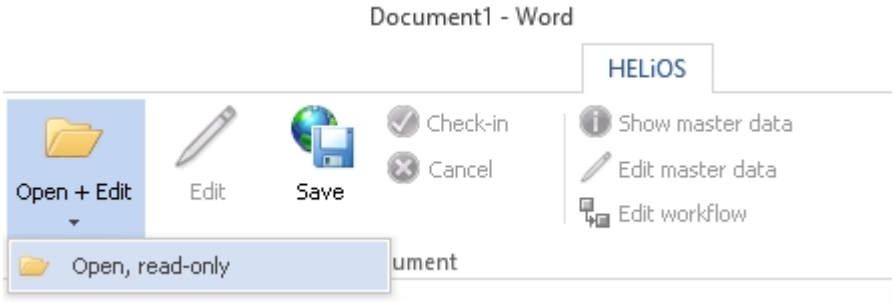
Furthermore, you have access to all HELiOS functions for the listed documents in the Workspace via a context menu (right-click document).

Depending on your preferred working method, you can decide whether you want HELiOS to generate unique file names, or if you want to assign file names manually.



Open documents for editing or in read-only mode

In the HELiOS Ribbon tab of your Office application you can choose between two opening modes for documents: If you select **Open+Edit**, the Office document will be loaded from the HELiOS database, and can then be edited; if you select **Open, read-only**, the loaded Office document can only be viewed, but not edited.

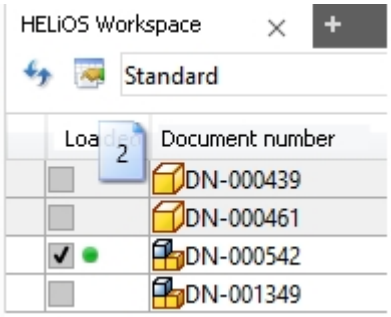


HELiOS CAD/CAE Integrations

Service Pack 2 2018 (V 2302)

Open documents via Drag & Drop

You can also open CAD documents (in AutoCAD, Inventor or SOLIDWORKS) by moving them from the window of the **HELiOS Workspace** into an empty area of the opened CAD application with Drag & Drop. This can also be done for multiple selections.

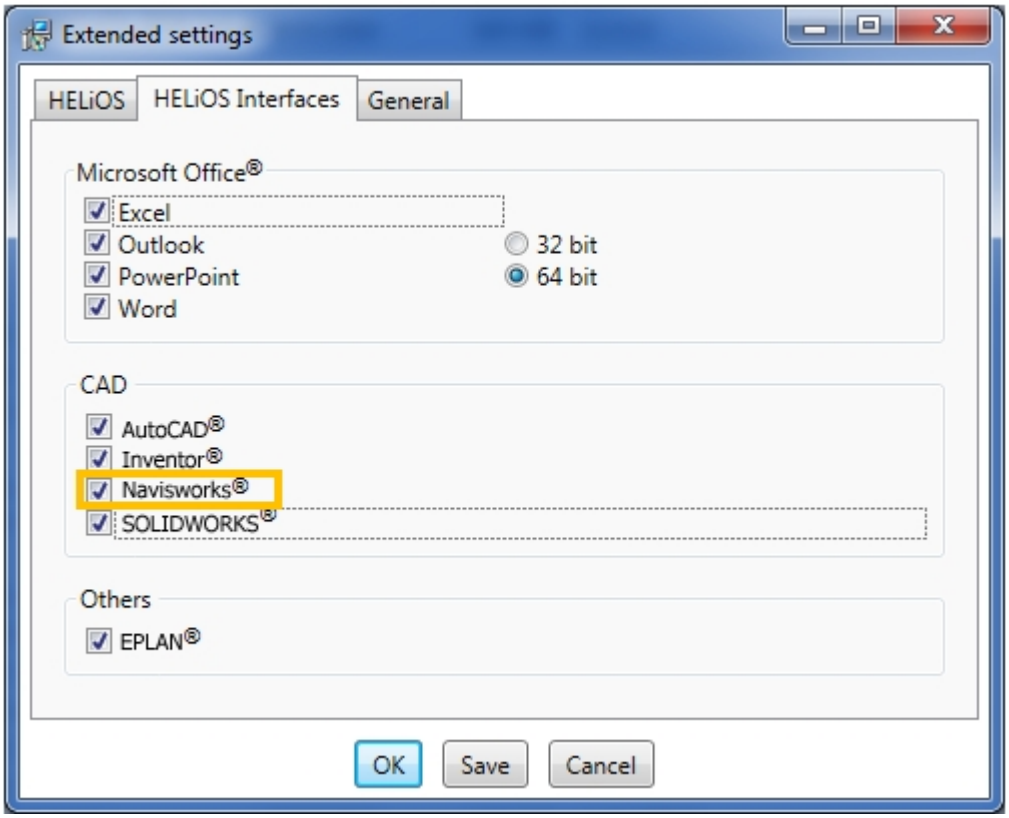


You can also insert parts into an active model drawing by moving them from the Workspace into the drawing with Drag & Drop.

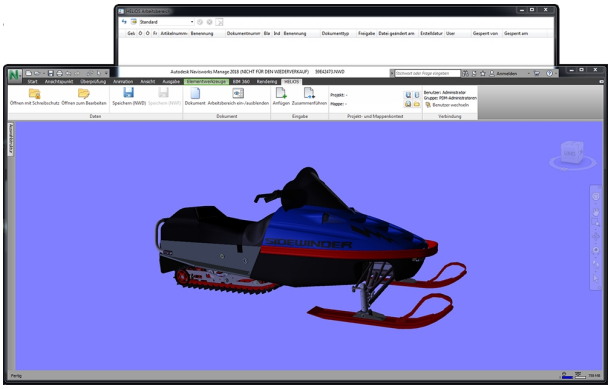
Service Pack 1 2018 (V 2301)

HELiOS interface to Autodesk Navisworks

As of HELiOS 2018 SP1 an interface to the design review software **Autodesk Navisworks** can be established.



This interface will give you direct access to various HELiOS functions in Navisworks for management of the documents.



Major Release 2018 (V 2300)

New module structure

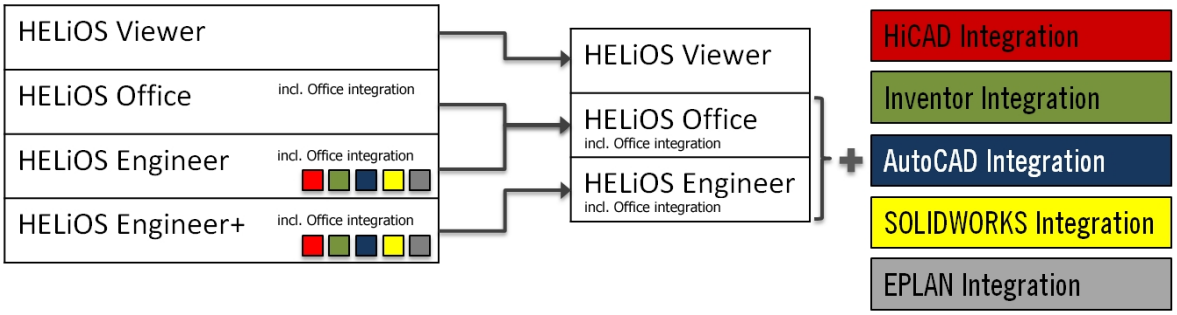
From HELiOS 2018 onwards, the CAD and CAE interfaces will only be available as separate extension modules.

Basic modules as of HELiOS 2018:

- HELiOS Viewer
- HELiOS Office
- HELiOS Engineer

New Extension modules:

- HiCAD Integration
- Inventor Integration
- SOLIDWORKS Integration
- AutoCAD Integration
- EPLAN Integration



The Extension modules can be combined with HELiOS Office or HELiOS Engineer; in combination with HELiOS Office, only a purely document-based working will be possible. Without the integration modules, each HELiOS basic module offers at least the viewing functionalities for the corresponding CAD-/CAE application.

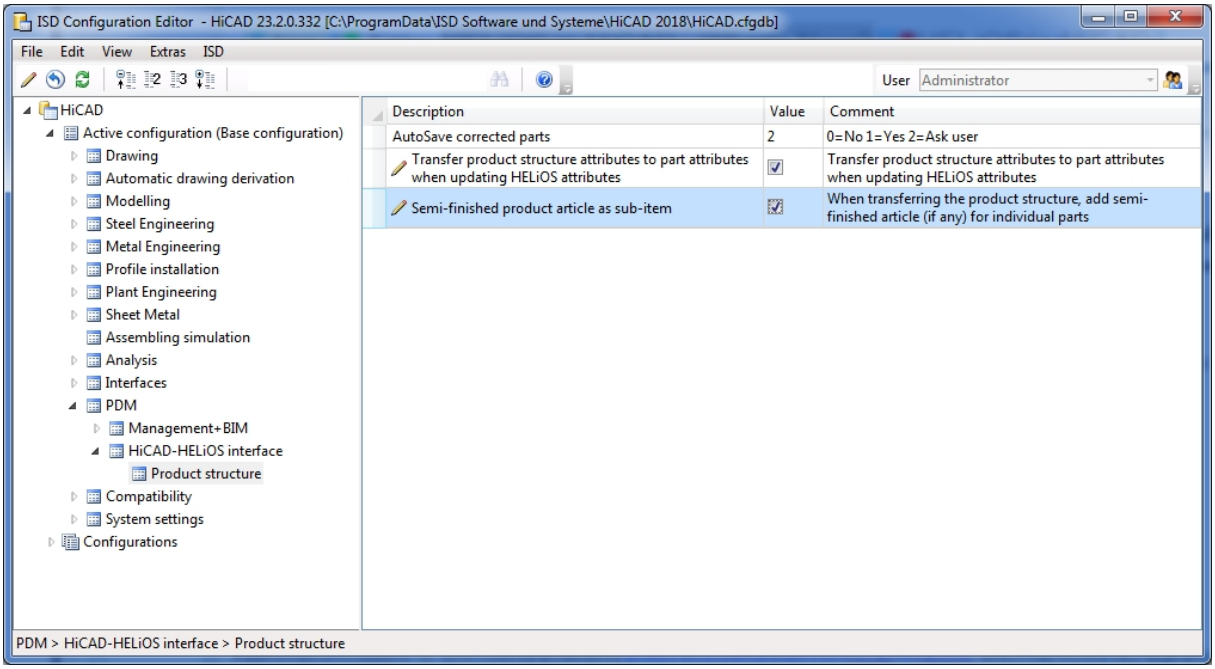
HELiOS in HiCAD

Service Pack 2 2018 (V 2302)

Semi-finished Product Article as Sub-item

Semi-finished products can be automatically transferred as sub-items of a part to HELiOS.

This can be set in the Configuration Editor at **Active configuration > Base configuration > PDM > HiCAD-HELiOS interface > Product structure**. Here, activate the **Semi-finisherd product article as sub-item** checkbox.



If a HiCAD model drawing (.SZA document) or an individual geometry (.KRA document) is saved in HELiOS while the option has been activated, it will be checked whether a semi-finished product needs to be saved as s structure sub-item of the corresponding part (=HELiOS article).

The relevant semi-finished product article masters will then be added as sub-item, or updated accordingly in the product structure of the part.

Service Pack 1 2018 (V 2301)

Performance

A performance increase of 10 - 20% could be achieved for product structure transfers from HiCAD to HELiOS, which may involve very large amounts of data.

HELiOS for AutoCAD

Service Pack 2 2018 (V 2302)

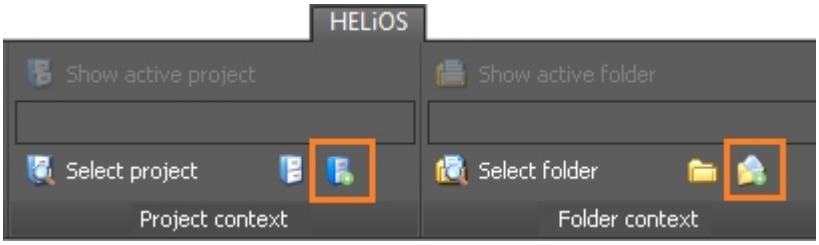
AutoCAD 2019

HELiOS 2018 SP2 supports Autodesk AutoCAD Version 2019.

Major Release 2018 (V 2300)

Project and Folder data input options added in HELiOS menu

When you click **New (Project)** or **New (Folder)** , respectively, you can directly enter new projects/folders in the HELiOS database via the **HELiOS** menu in AutoCAD.



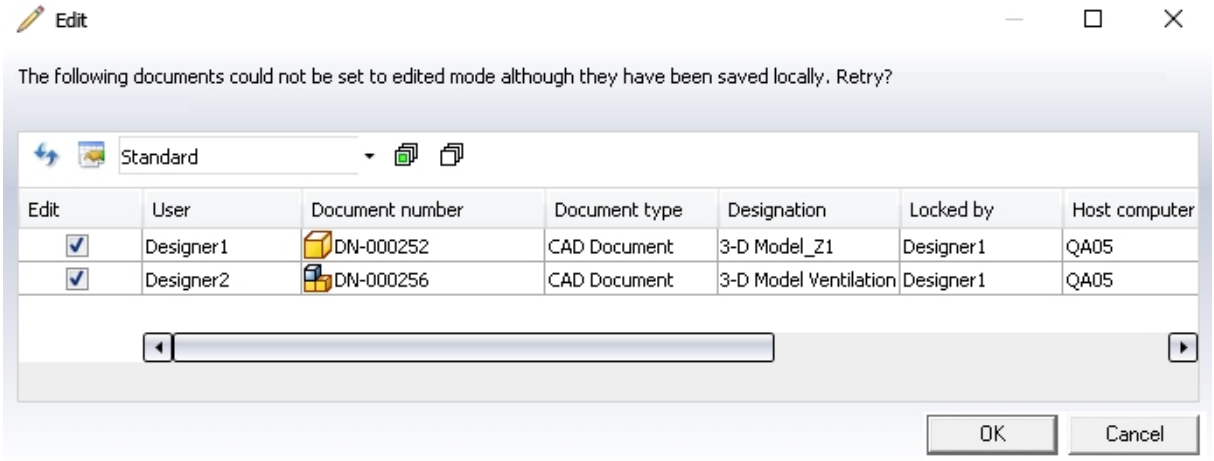
HELiOS for Autodesk Inventor

Service Pack 2 2018 (V 2302)

Revised menus and dialogues, new options

HELiOS 2018 Service Pack 2 comes with standardized HELiOS dialogue windows in Inventor. This concerns, for instance, the document data input masks in drawing contexts.

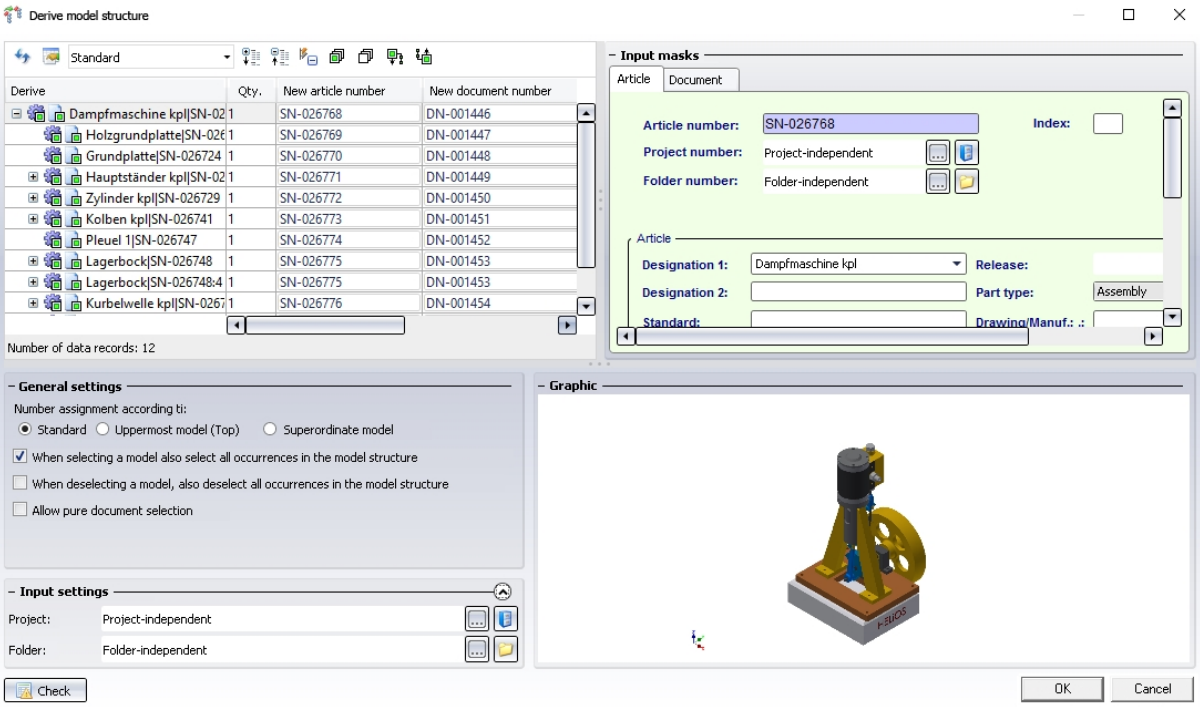
If an assembly cannot be saved completely - e.g. because changed components (referenced documents) are currently being edited by another user - this will be indicated in dialogue windows based on the HELiOS result list principle. There you can see, for instance, which documents are currently being edited (and, therefore, locked) by which user and on which host computer.



In the **Data** function group of the **HELiOS - Part / Assembly / Drawing** Ribbon, and also the **HELiOS - Active part** Ribbon , you can find functions for display and editing of the Workflow status.

The **HELiOS - Active part** Ribbon has been expanded (see below).

The master data masks for articles and documents have been integrated into the **Derive model structure** dialogue window:



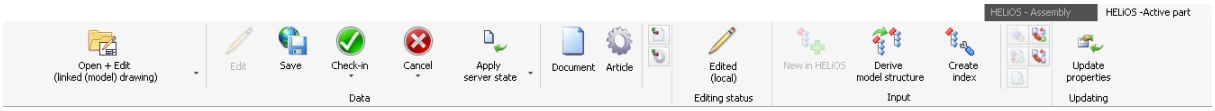
Also, the Options dialogue has been revised. If you carry out an update installation, the system will take over the individual settings of the first user that will be found first. The settings of the new Options dialogue are not user-specific, but apply globally.

Please note:

Some settings are still specified in the global **Options and Settings for CAD Integration**.

"New in HELiOS", Derive model structure and editing status for active part

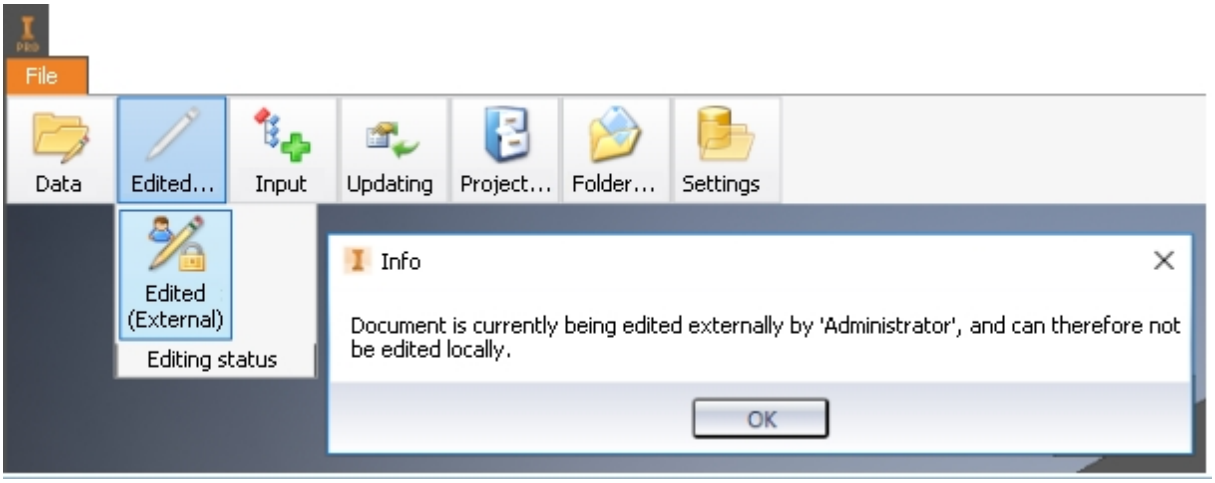
Some new functions have been added to the HELiOS - Active part Ribbon tab (now identical with the **HELiOS - Part** Ribbon tab).



Furthermore, the **New in HELiOS** function now allows the transfer of the CAD structure to the HELiOS database, and the **Derive model structure** function allows the creation of derived drawings of the active part directly on the Active part Ribbon (rather than in the context of the entire drawing).

The **Editing status** shows you whether the active part is currently being edited (and, therefore, locked).

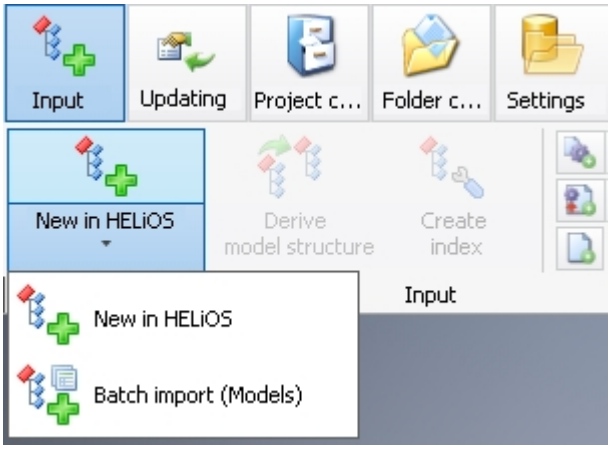
If the active part has been locked because it is currently being edited by a different user, this user will be indicated in a message.



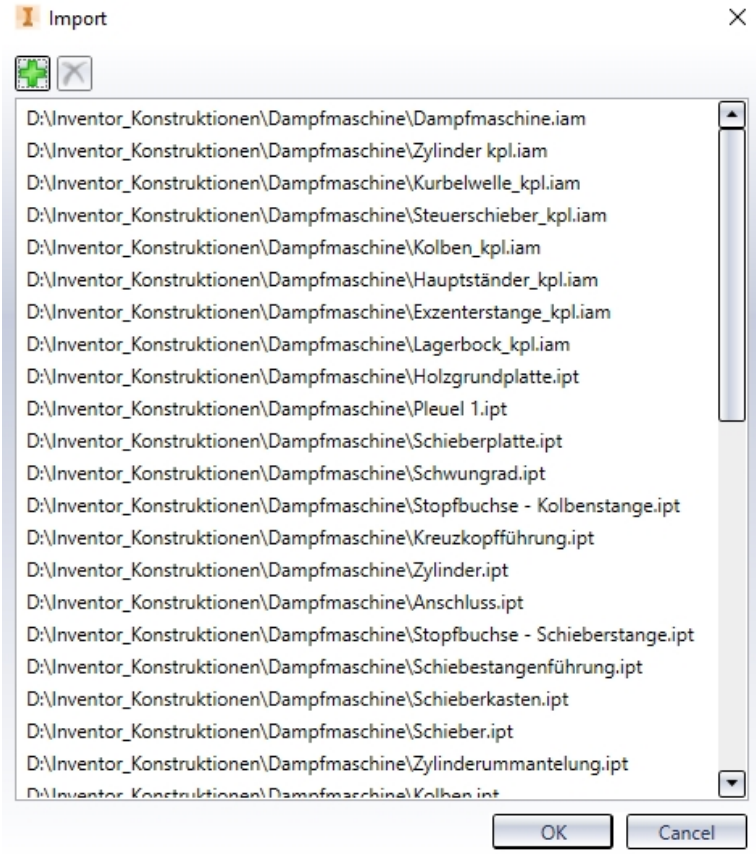
Batch import

Use the **Batch import (Models)** function to import a multitude of files from a directory to HELiOS with a few mouse clicks.

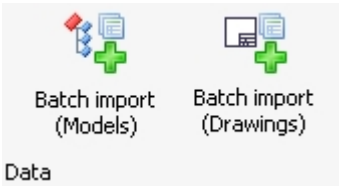
If no HELiOS document has been opened, you can find the function in the **Data** function group or, if an assembly is active, in the **Input** function group of the HELIOS-Ribbon.



When you call the function, a dialogue window for selecting the directory from which .ipt and .iam files are taken over for batch import.



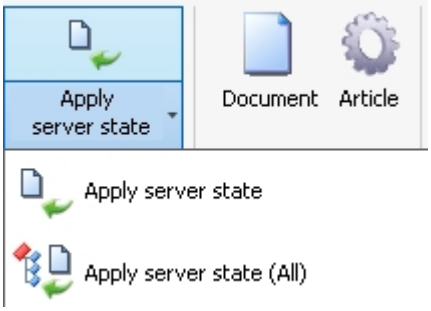
In the **Data** function group you can find, besides the **Batch import (Models)** function, the additional **Batch (Drawings)** function.



You can use this function to transfer "associated" drawings that were not considered for batch import due to name conventions during the previous batch import.

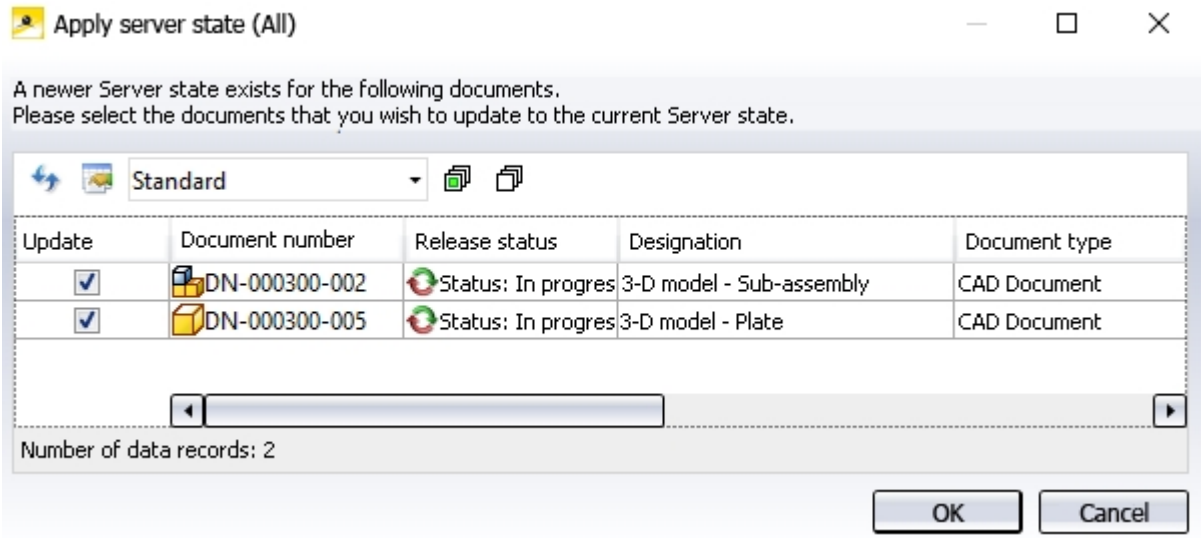
Apply server state

In the **Data** function group of the **HELiOS** Ribbon, or in the menu of the active part, you can find the two functions **Apply server state** and **Apply server state (All)**.



The **Apply server state** function checks whether the currently loaded document or the active document is identical with the current server state. If this is not the case- e.g. because the document has been saved by a different user in the meantime, or exists with a newer index, or because the master data of a linked article have changed or the article exists with a newer index - use this function to apply the current Server state to the document.

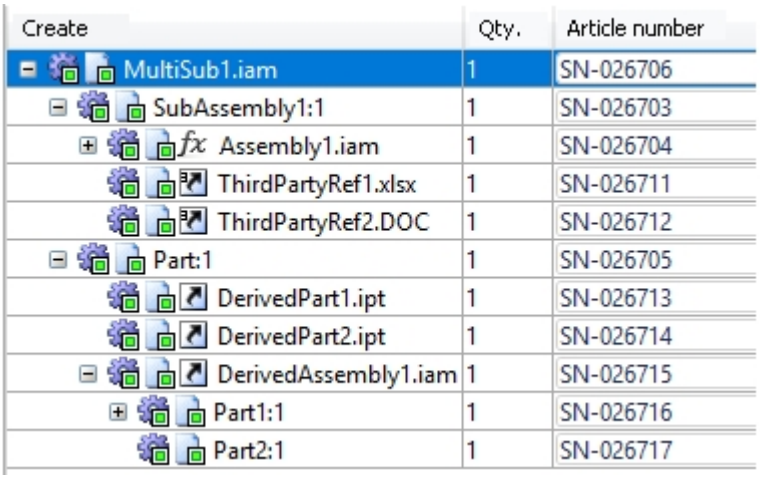
Likewise, the **Apply server state (All)** applies the current Server state to all documents in the loaded document, including all documents that are subordinated to the active document - a selection dialogue will be displayed where all documents with a newer Server state are listed:



Support of dependent parts, parameter references and 3rd party references

The functions **New in HELiOS** (transfer of the CAD model structure to the HELiOS database) and **Derive model structure** now also support dependent parts (i.e. referenced parts with dependencies from other parts in model drawings), parameter references and so-called third party references.

These will also be marked accordingly with special symbols in the tree structure (as well as on the **Model structure** tab of a HELiOS document detail dialogue).



- indicates dependent parts.
- indicated parameter references.
- indicates 3rd party references.

Product structure transfer

Use the **Transfer product structure** function (in the **Transfer** function group of the **HELiOS** Ribbons of an **Assembly**), to synchronize the CAD part structure with the HELiOS product structure.

In the process, the components of the "**BOM Structure**" will be considered as follows:

- **Normal** components will appear as such in the product structure.
- **Reference** components and sub-components that may exist will *not* be taken over to the product structure.
- **Purchased** and **Inseparable** components and sub-components that may exist will be taken over into the product structure.

Phantom components will also be considered, i.e. components with HELiOS document number but without article number will be treated like Phantom components; the sub-components will be moved up in the product structure.

Management of Inventor standard parts in HELiOS

From HELiOS 2018 SP2 onwards, Inventor standard parts can also be managed in HELiOS.

In previous versions, (write-protected) Standard Parts from the Inventor Content Centre could be transferred to HELiOS, but for viewing purposes only; they could neither be edited there nor did they have an article number in the BOM.

One effect of this was that some functionalities, e.g. the BOM output in drawings, could only be used in a limited way.

To allow Standard Parts from the Content Centre to be synchronized and modified in HELiOS (e.g. their iProperties), these can now also be managed in HELiOS.

The saving of the standard parts as documents in HELiOS enables, among other things, an export of assemblies complete with their standard parts on systems where HELiOS has not been interfaced with Inventor.

While the Content Centre remains the source of the standard parts, the permissions management takes place on HELiOS.

When you save an assembly it will be checked whether references to Standard Parts managed with HELiOS, currently pointing to the Content Centre, do already exist. If this is the case, the corresponding reference will be exchanged with a reference to the Standard Part of the HELiOS Session.

As a result, all assemblies which have been saved in HELiOS by the user in the past, will be updated accordingly when saving them again.

Please note:

- The above change may cause longer waiting times when you save for the first time; very many sub-parts may be set to an "edited" state in the process.
- If you do not have the required permissions (e.g. due to a release), the references will not be exchanged.

Service Pack 1 2018 (V 2301)

Inventor 2019

HELiOS 2018 Service Pack 1 supports Autodesk Inventor Version 2019.

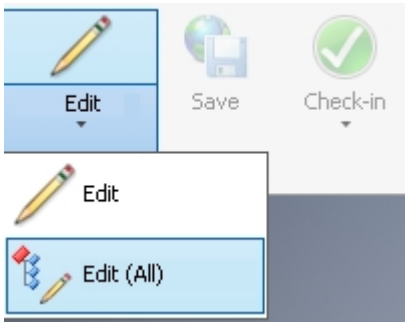
Performance

A performance increase could be achieved for model structure operations and saving processes that comprise all data storage operations:

Besides the **Save** and **Check-in** function this also concerns the **New in HELiOS** and the **Derive via model structure** function.

Edit (All)

In the **Data** function group of the **HELiOS - Assembly** Ribbon you can find the new **Edit (All)** function, which enables you to set the complete model drawing to an "edited" state.



Provided that you have an editing permission in HELiOS, this function allows you to set a multitude of sub-assemblies and sub-parts to "edited" while taking all dependencies between them into account.

Update properties

In the Updating function group of your HELiOS Ribbon you find the new **Update properties** function.

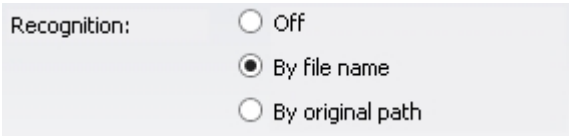
This function updates the properties of the active document according to the HELiOS attributes, i.e. the direction is from the PDM system HELiOS to the CAD system.

Although automatic updating takes place upon loading and saving, cases may occur where a manual updating of the attributes can be useful.

Please note that an object must be in "edited" state for the function to be carried out.

New in HELiOS: Recognition of already transferred documents

The **New in HELiOS** function for the transfer of complete CAD assemblies to the database now has a new option for the recognition of already transferred documents:



If **Recognition** has been set to **Off**, parts can be re-entered in HELiOS, i.e. the same assembly can be entered multiple times. If you do not want this, you have the following two options:

By file name: Each document to be transferred will first by searched in HELiOS. If a HELiOS document with the same file name is found, the document will not be transferred, but the one that already exists in the database will be reused.

By original path: During data transfer, HELiOS saves the (complete) original file path. If this option has been activated, the system searches for documents in HELiOS for which this original path has been set.

A recognition by file name makes sense if you want to transfer old data in a local directory, e.g. because they were stored there by a CAD designer for a later transfer. For a successive data transfer from a central directory (e.g. on a Server), in contrast, the recognition by original path would be the preferred option.

Enhanced attribute mapping

The new attribute mapping does not only concern the mapping of the document master attributes when documents are saved in HELiOS or are taken over as new documents (e.g. via the **New (Document)**), but also the creation of articles during a targeted transfer of individual documents to HELiOS with the **New (Document / Find article)** function.

The attribute mapping can be configured in the corresponding document data input mask.

Folder attributes in title blocks

In addition to the document, article and project attributes, folder attributes are now supported in the title blocks of drawings.

Major Release 2018 (V 2300)

New in HELiOS

The **New in HELiOS** function for the taking over of complete CAD assemblies has been enhanced.

The direct assigning of values to all attributes is now possible via an integrated mask display. Furthermore, you have extensive configuration options, e.g. for number assignment, folder and project data initialisation and for attribute mapping.

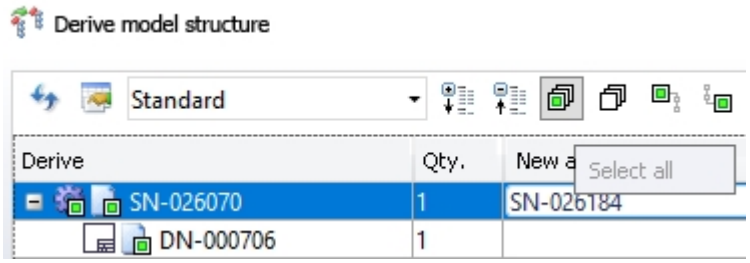
The new dialogue replaces the "HELiOS Info Centre" of older versions.

New options for derivations via CAD structure

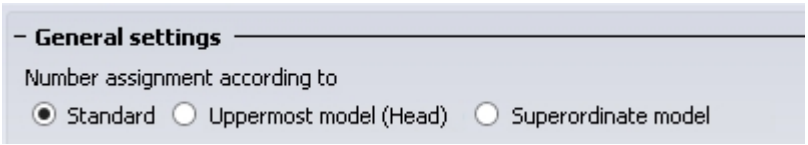
The **Derive model structure** dialogue window has a number of new options.

This includes, for instance, the options for number assignment at the bottom of the window: When directly selecting articles and documents with a mouse click, the next free (i.e. still unused) number will be assigned to the selected element during consecutive numbering. In this way it is ensured that, in case of an intentional, manually defined selection order, the intended designation will actually be kept to.

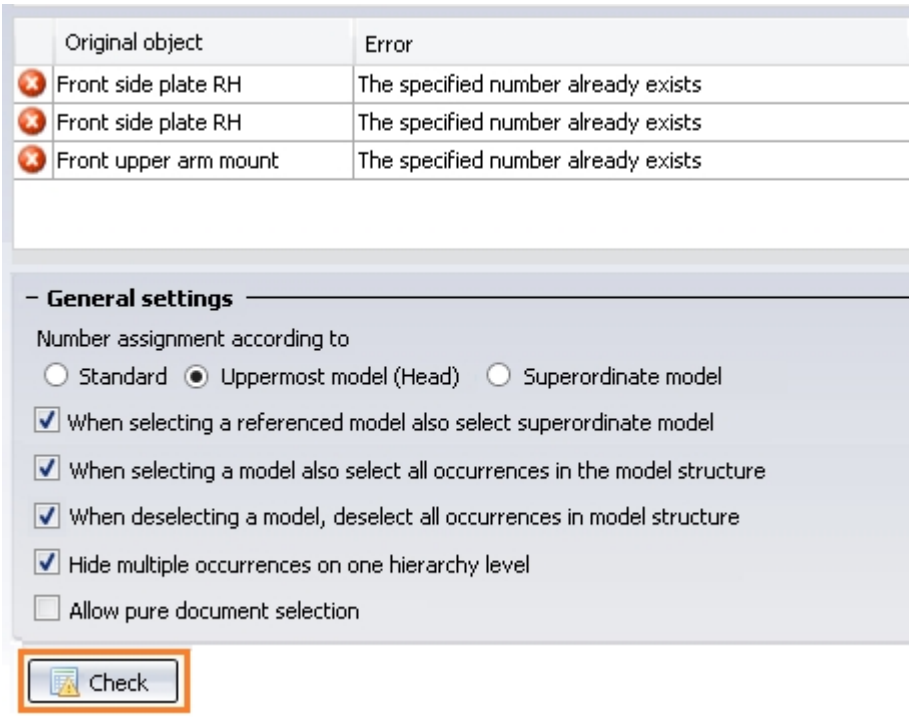
The additional options menu at the top of the window can be used to expand or collapse the entire structure, select or deselect the entire structure, and determine whether subordinate or superordinate elements of a chosen element should be selected as well or not (please note however that there are dependencies that cannot be broken up - in these cases, the corresponding selections will be made automatically).



Furthermore, the assigning of numbers to individual structure elements can take place either based on the uppermost part of the entire structure or based on the immediate, superordinate model.

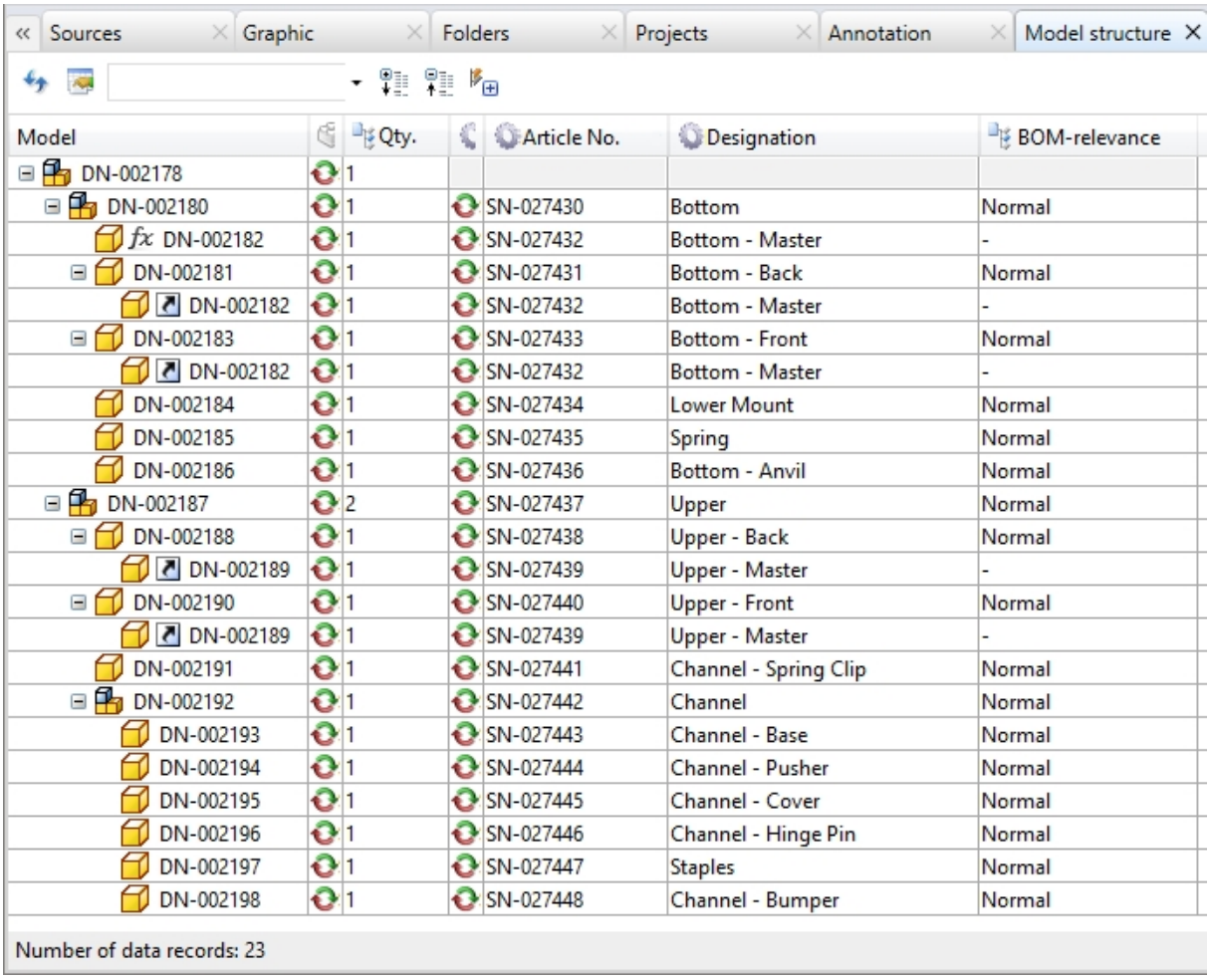


Use the **Check** button at the bottom of the dialogue window to update the error list in the window, e.g. in order to check whether all errors (with regard to number assignments) have actually been corrected.



Model structure display in detail masks and in the HELiOS Desktop

In the **Document** detail masks, both in the context of the Inventor interface and in the HELiOS Desktop, you can now find the **Model structure** tab.



Model	Qty.	Article No.	Designation	BOM-relevance
DN-002178	1			
DN-002180	1	SN-027430	Bottom	Normal
DN-002182	1	SN-027432	Bottom - Master	-
DN-002181	1	SN-027431	Bottom - Back	Normal
DN-002182	1	SN-027432	Bottom - Master	-
DN-002183	1	SN-027433	Bottom - Front	Normal
DN-002182	1	SN-027432	Bottom - Master	-
DN-002184	1	SN-027434	Lower Mount	Normal
DN-002185	1	SN-027435	Spring	Normal
DN-002186	1	SN-027436	Bottom - Anvil	Normal
DN-002187	2	SN-027437	Upper	Normal
DN-002188	1	SN-027438	Upper - Back	Normal
DN-002189	1	SN-027439	Upper - Master	-
DN-002190	1	SN-027440	Upper - Front	Normal
DN-002189	1	SN-027439	Upper - Master	-
DN-002191	1	SN-027441	Channel - Spring Clip	Normal
DN-002192	1	SN-027442	Channel	Normal
DN-002193	1	SN-027443	Channel - Base	Normal
DN-002194	1	SN-027444	Channel - Pusher	Normal
DN-002195	1	SN-027445	Channel - Cover	Normal
DN-002196	1	SN-027446	Channel - Hinge Pin	Normal
DN-002197	1	SN-027447	Staples	Normal
DN-002198	1	SN-027448	Channel - Bumper	Normal

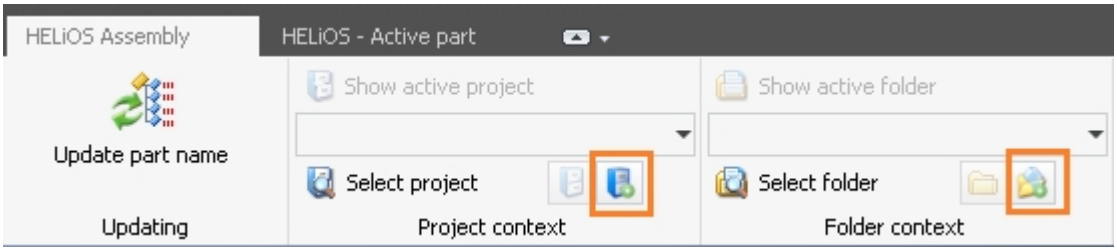
Number of data records: 23

The information on this tab provides an overview of the sub-documents to the entire model structure of the document managed in HELiOS.

This serves also as a basis for future documents where-used lists and the saving of further information, e.g. different article assignments to a document.

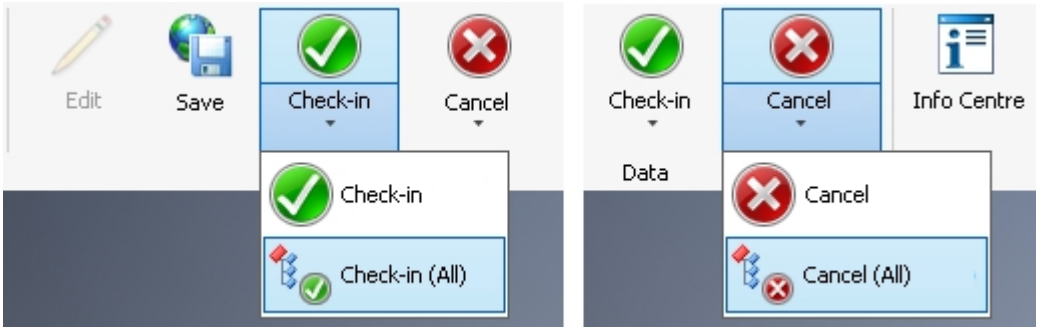
Project and Folder input functions on HELiOS Ribbon tab

The functions **New (Project)** and **New (Folder)** in the Project context and Folder context function groups of the **HELiOS** menu enable you to directly enter new Projects and Folders into the HELiOS database.



Editing of documents - Check in (All) / Cancel (All)

With the functions **Check-in (All)** and **Cancel (All)** in the **Data** function group of the **HELiOS - Assembly** tab (and the HELiOS - Active part tab), all changes to an assembly including its sub-parts can now be applied (Check-in) or discarded (Cancel) with one mouse click.



Subsequent and multiple linking of articles

The functions **Link new article** and **Link existing article** enable a convenient linking of documents in the Ribbon of your CAD environment subsequently with newly created or already existing HELiOS articles.

In the process, different article assignments to a document will be supported.

If a model article for the document already exists, you will be asked whether you would like to replace it with the new one.

Notes on attribute mapping

In older versions, the attribute mapping that determines, e.g., which Inventor attributes are to be written into which fields of the HELiOS database, was stored in the system files hel_fileattributes.ini and helios_cs_global_config.dat.

HELiOS 2018 (Version 2300) comes with a revised mapping technology that replaces these files.

This means that already used mapping configurations may require some adjustment, as the older system files will no longer be read out for this purpose.

HELiOS for SOLIDWORKS

Service Pack 2 2018 (V 2302)

SOLIDWORKS 2019

HELiOS 2018 SP 2 supports SOLIDWORKS Version 2019.

Product structure transfer: Documents without article assignment

For assemblies to which an article master has been assigned, the product structure will be transferred upon saving.

If the assembly contains sub-assemblies which are managed in HELiOS, but do not have an assigned article master, the behaviour during product structure transfer will be as follows:

- If an assembly is not managed in HELiOS, the sub-assemblies and its sub-parts will not be considered for the product structure transfer of the assembly.
- If the sub-assembly in HELiOS is managed as a document in HELiOS, but has no article master, or no BOM-relevance, it will also be ignored for product structure transfer.
- Sub-assemblies that are assigned to assemblies without article master, which in turn have an article master, will be "moved up" in the hierarchy of the product structure.

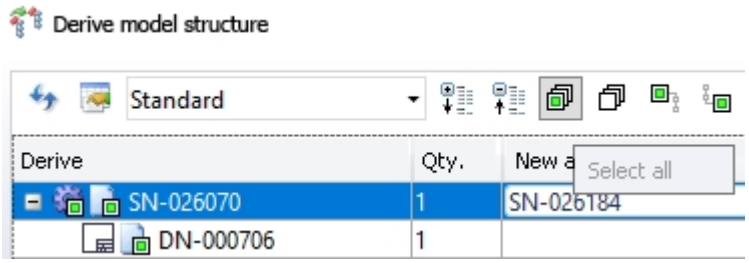
Major Release 2018 (V 2300)

New options for derivations via CAD structure

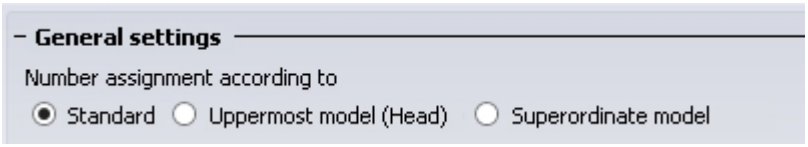
The **Derive model structure** dialogue window has a number of new options.

This includes, for instance, the options for number assignment at the bottom of the window: When directly selecting articles and documents with a mouse click, the next free (i.e. still unused) number will be assigned to the selected element during consecutive numbering. In this way it is ensured that, in case of an intentional, manually defined selection order, the intended designation will actually be kept to.

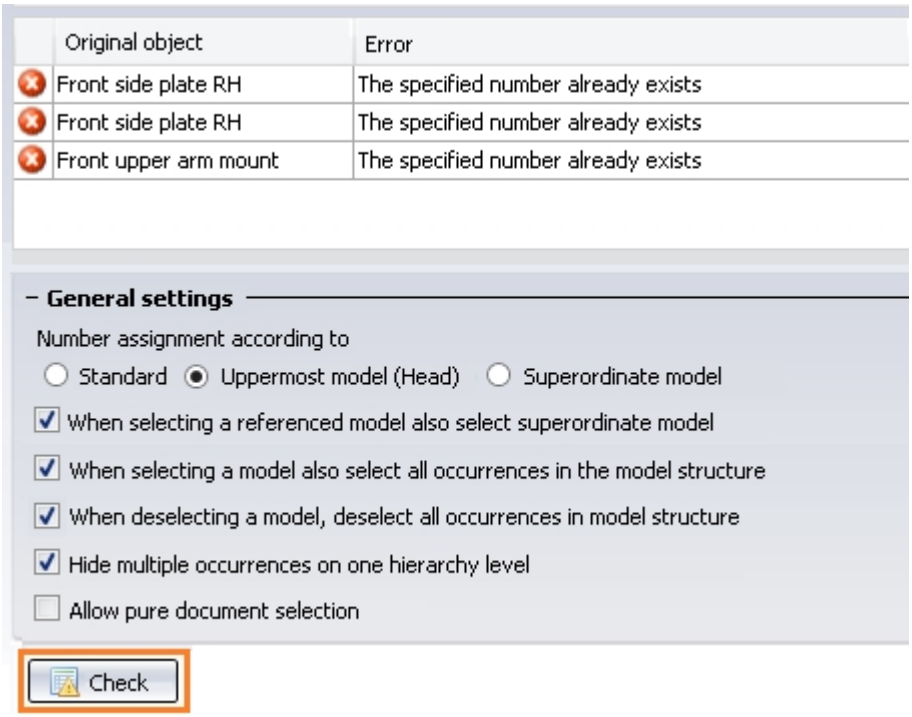
The additional options menu at the top of the window can be used to expand or collapse the entire structure, select or deselect the entire structure, and determine whether subordinate or superordinate elements of a chosen element should be selected as well or not (please note however that there are dependencies that cannot be broken up - in these cases, the corresponding selections will be made automatically).



Furthermore, the assigning of numbers to individual structure elements can take place either based on the uppermost part of the entire structure or based on the immediate, superordinate model.

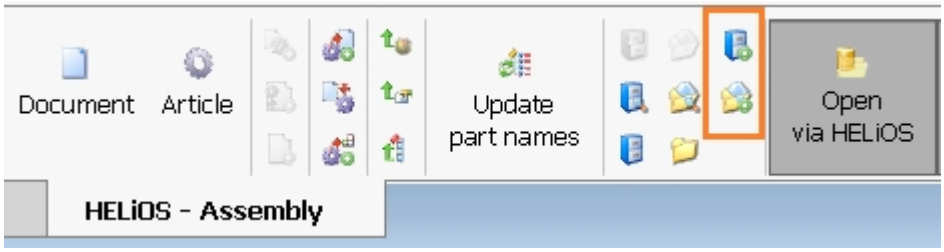


Use the **Check** button at the bottom of the dialogue window to update the error list in the window, e.g. in order to check whether all errors (with regard to number assignments) have actually been corrected.



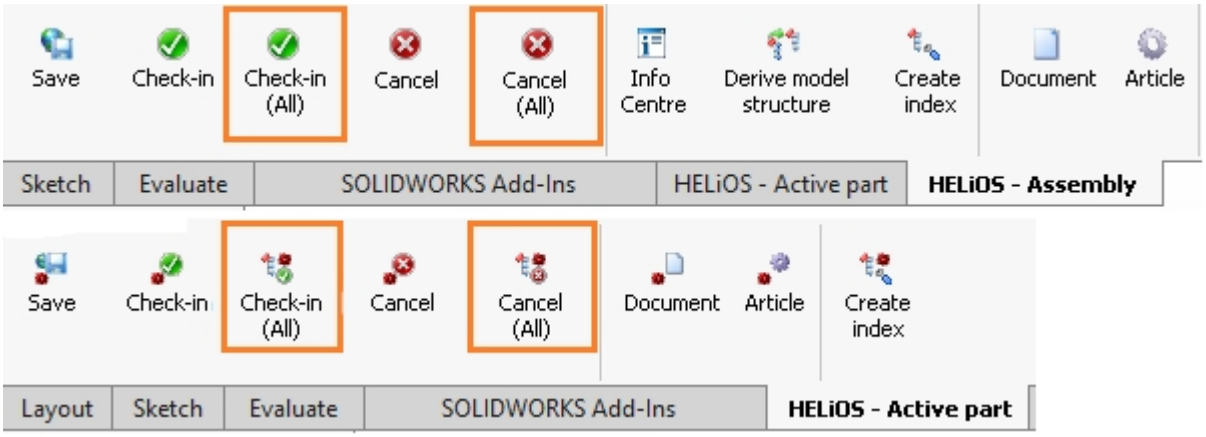
Project and Folder input functions on HELiOS Ribbon tab

The functions **New (Project)** and **New (Folder)** in the Project context and Folder context function groups of the **HELiOS** menu enable you to directly enter new Projects and Folders into the HELiOS database.



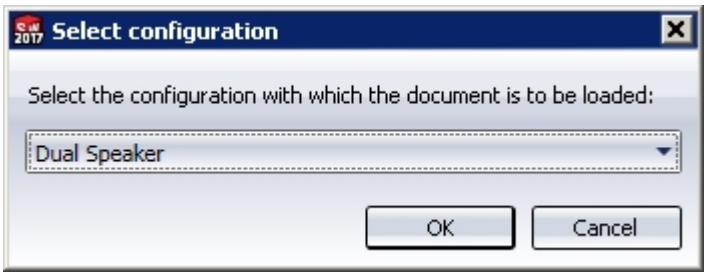
Editing of documents - Check in (All) / Cancel (All)

With the functions **Check-in (All)** and **Cancel (All)** on the **HELiOS - Assembly** tab (and the HELiOS - Active part tab), all changes to an assembly including its sub-parts can now be applied (Check-in) or discarded (Cancel) with one mouse click.



Select configuration when opening documents

When you open a HELiOS document and there are several configurations for one contained SOLIDWORKS part, a dialogue will be displayed, asking you to make a choice.



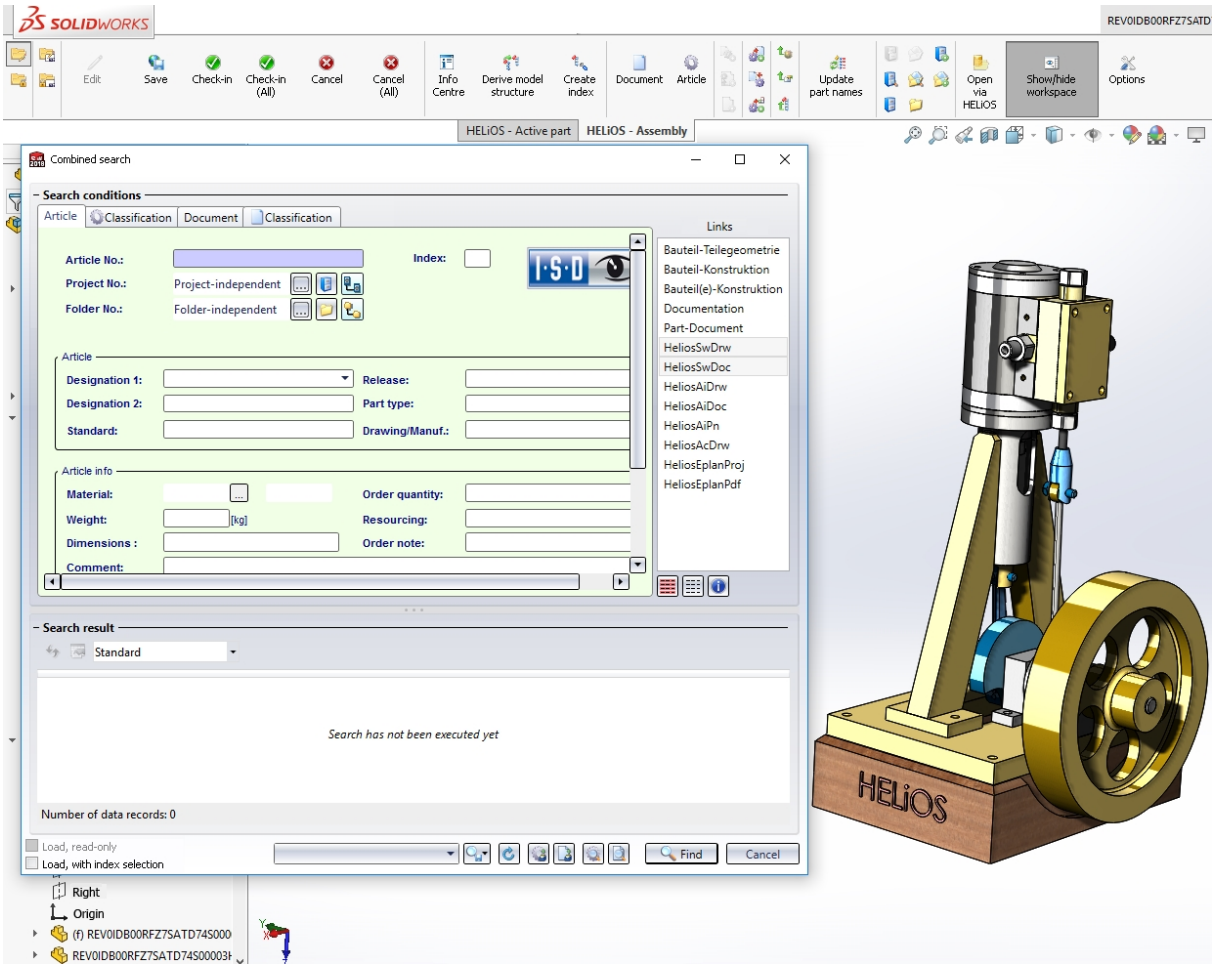
Important:

When selecting a configuration, the article context after loading may differ from the article that was originally selected by the user.

The dialogue appears when you load via the document master while the article master is ambiguous; if the article master has been clearly assigned to a configuration, the dialogue will not appear.

Further enhancements of the user interface

The HELiOS dialogue windows and context menus in the SOLIDWORKS user interface have been further adjusted to the standards that your are used to from the HELiOS Desktop.



Rechtliche Hinweise:

© 2018 ISD ® Software und Systeme GmbH alle Rechte vorbehalten

Dieses Handbuch sowie die darin beschriebene Software werden unter Lizenz zur Verfügung gestellt und dürfen nur in Überein-stimmung mit den Lizenzbedingungen verwendet oder kopiert werden. Der Inhalt dieses Handbuches dient ausschließlich zur Information, kann ohne Vor-ankündigung verändert werden und ist nicht als Verpflichtung von ISD Software und Systeme GmbH anzusehen. Die ISD Software und Systeme GmbH gibt keine Gewähr oder Garantie hinsichtlich der Richtigkeit oder Genauigkeit der Angaben in dieser Dokumentation. Kein Teil dieser Dok-umentation darf, außer durch das Lizenzabkommen ausdrücklich erlaubt, ohne vorherige, schriftliche Genehmigung von ISD Software und Systeme GmbH reproduziert, in Datenbanken gespei-chert oder in irgendeiner Form übertragen werden.

Alle erwähnten Produkte sind Warenzeichen oder eingetragene Warenzeichen ihrer jeweiligen Hersteller.

Legal notes

© 2018 ISD ® Software und Systeme GmbH. All rights reserved.

This User Guide and the software described herein are provided in conjunction with a license and may only be used or copied in accordance with the terms of the license. The contents of this User Guide solely serve the purpose of information; it may be modified without prior notice and may not be regarded as binding for the ISD Software und Systeme GmbH. The ISD Software und Systeme GmbH does not assume any responsibility for the correctness or accuracy of the information provided in this document. No part of this document may be reproduced, saved to databases or trans-ferred in any other form without prior written permission by the ISD Software und Systeme GmbH, unless expressly allowed by virtue of the license agreement.

All mentioned products are trademarks or registered trademarks of their respective manufacturers and producers.

HELiOS

UNLIMITED PLM PERFORMANCE **DEVELOPED BY ISD**

ISD Software und Systeme GmbH
Hauert 4
44227 Dortmund
Germany
Tel. +49 (0)231 9793-0
Fax +49 (0)231 9793-101
info@isdgroup.de

ISD Berlin
Paradiesstraße 208a
12526 Berlin
Germany
Tel. +49 (0)30 634178-0
Fax +49 (0)30 634178-10
berlin@isdgroup.de

ISD Austria GmbH
Hafenstraße 47-51
4020 Linz
Austria
Tel. +43 (0)732 21 04 22-0
Fax +43 (0)732 21 04 22-29
info@isdgroup.at

ISD Hamburg
Strawinskystraße 2
25337 Elmshorn
Germany
Tel. +49 (0)4121 740980
Fax +49 (0)4121 4613261
hamburg@isdgroup.de

ISD Benelux b.v.
Het Zuiderkruis 33
5215 MV 's-Hertogenbosch
The Netherlands
Tel. +31 (0)73 6153-888
Fax +31 (0)73 6153-899
info@isdgroup.nl

ISD Hannover
Hamburger Allee 24
30161 Hanover
Germany
Tel. +49 (0)511 616803-40
Fax +49 (0)511 616803-41
hannover@isdgroup.de

ISD Benelux b.v.
Grote Voort 293A
8041 BL Zwolle
The Netherlands
Tel. +31 (0)73 6153-888
Fax +31 (0)73 6153-899
info@isdgroup.nl

ISD Nürnberg
Nordostpark 7
90411 Nuremberg
Germany
Tel. +49 (0)911 95173-0
Fax +49 (0)911 95173-10
nuernberg@isdgroup.de

ISD Schweiz AG
Rosenweg 2
4500 Solothurn
Switzerland
Tel. +41 (0)32 624 13-40
Fax +41 (0)32 624 13-42
info@isdgroup.ch

ISD Ulm
Wilhelmstraße 25
89073 Ulm
Germany
Tel. +49 (0)731 96855-0
Fax +49 (0)731 96855-10
ulm@isdgroup.de

www.isdgroup.com

Dieses Dokument wird automatisch generiert. / This document is generated automatically.

© 2018 ISD Software und Systeme GmbH