

# **HELiOS - What's new?**

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# **Notes on HELiOS Updates**

Service Pack 2 (V 2402)

### Important Notes on Updates for Administrators

For updates to Service Pack 2 of HELiOS 2019 a central update of the supplied HELiOS database is required (from sub-schema 166 to 194).

Since conflict may occur during the update process in case of inconsistent data stocks, you should do the following:

#### 1.) Make a data backup before updating

Make sure that a data backup was made before carrying out the update of your HELiOS database.

For the backup, either use the HELiOS Database Creator (further information can be found in the Installation Notes) or your SQL Server Application.

In case of any questions, or if you need any help with regard to your customized system architecture , contact the ISD Hotline.

#### 2.) If required, use the log file for the update

If any conflicts occur during the update, these will be recorded in the log file HeliosDbUpdate.txt (in the system path %appdata%\ISD Software und Systeme\HeliosDbUpdate\).

Have this file ready when contacting the ISD Hotline in case of an unsuccessful update, so that they can help you solve the problem and make a successful update.

# **HELiOS Desktop**

Service Pack 2 (V 2402)

## About HELiOS Desktop window: Installed Hotfixes

The About HELiOS Desktop window now also shows, besides the current Version and Build number, the numbers

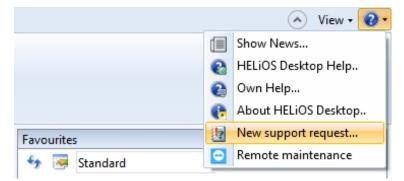
of installed Hotfixes. To open this window, choose V > About HELiOS Desktop at the top right of the HELiOS Desktop.



Support request

The new **Solution** New support request function takes you directly to the support portal of the ISD Group, where you can create a support ticket.

After calling the function, use your login data for my-ISD to access the support portal of the ISD. Fill in the form, attach files if required and click on **Create request**.



The new ISD support portal will be available for customers in Germany from 1 October 2019. For customers in other countries, the launch is scheduled for January 2020.

#### Attribute mapping for file import via Drag & Drop and serial input

On the **Import/Export** tab of the **HELIOS Options** dialogue window you can find, beneath **Attribute assignments**, setting options for the **Transfer to HELIOS**, which will apply for file import via Drag & Drop.

General	
Input	Settings for import and export
Display	
Result lists	- Import
Project and Folder structur	Settings in sys\hel_fileimport.ini Open
Print	- Export
Import/Export	Always show configuration dialogue
Workflow	Settings in sys\hel_fileexport.ini Open
Log	- Attribute assignments
Database	
Document type	Settings for: Transfer to HELiOS
Help	
X Attribute assignmen	s for import to HELiOS
Type: File property	
Filter:	× •
Source	Destination
File name (witho	ut path) 💿 Designation (BENENNUNG, Document)
File extension w	th 17 case differentiations 🛛 💀 Document type (DOCUMENT_TYPE, Document)

The procedure is largely similar to the attribute mapping known from the Multi-CAD interfaces and also allows the definition of different templates, which can be used, via menu selection, for the import.

# Automatic removing of old sessions

In case of a HELiOS Desktop crash or the crash of a linked application such as HiCAD, it is now ensured that "old" sessions are automatically removed, and thus unlocked, on the relevant computer system when HELiOS is restarted. This means that you do not have to manually unlock any sessions any more.

H	lelios Session					
	Session ID	User	Computer name	Date	Application	Process ID
	1232	Administrator	DEDTM133	19.09.2019	HELiOS.exe	9024

## Service Pack 1 (V 2401)

### Redesigned user interface

HELiOS 2401 SP1 comes with redesigned and modernized windows and input masks for the HELiOS Desktop and interfaced applications (CAD programs, Office...). Fields with input options are underlined, currently active fields are underlined in blue.

Article			
Article number:	SN-027285	Index:	
Project number:	PN-01-06-K, Order, Const 📖 🏮		
Folder number:	Folder-independent 🛛 💭		
Article			
Designation 1:	Beam 🔻	Release:	
Designation 2:		Part type:	Part 💌
Standard:		Drawing/Manuf.:	
Article info			
Material:		Order quantity:	· · · ·
Weight:	[kg]	Resourcing:	· · · · · ·
Dimensions :		Order note:	
Comment:	Active input field		0
e) 🖉			OK Cancel Apply

Clicking on the Symbol at the end of an active input field clears the field (as an alternative to the Delete key). The **Login** dialogue, too, has had a redesign.

Login/Logout
🛓 Administrator
PDM Administrators
- Active project
PN-01-06-K, Order, Construction Documents 🛛 🛄 🔋
\PN-01-06-K
- Active folder
Folder-independent 🞾
- Settings

The Mask Editor now offers the optior	to add an <b>Annotation</b> to an attribute field.
---------------------------------------	--

Pro	perties data field			×
	Attribute			
	<u>N</u> ame:	Benennung		
	Designation:	Designation		
	Description:			
	Display			
	Field length:	280 .	Field height: 12	•
	Text length:	80 .	Unlimited text ler	ngth
	Annotation:	Here you can a	nnotate the field	
	Initialisation:			
		🗖 File name eo	litable	
		Show last in	puts	
	Allowed charact	ers		
	🗹 Small letter	s (az)	Special character	ers
	🗹 <u>C</u> apital lette	rs (AZ)	🔽 <u>W</u> hitespace	
	⊠ <u>N</u> umbers (0	9)	🗹 <u>D</u> ot (,)	
	🗹 Character -	+ e E	✓ Plus (+)	
	🗌 Line break			
			ОК	Cancel

Masks that have been adjusted with the Mask Editor will then appear with the new layout in the HELiOS Desktop.

Document number		Sheet	Index	I-S-D 🕥
Project number 20190403-1, Developmer	nt, Tests Demo		U 4	
Folder number Folder-independent			2	
Document			_	]
Designation			•	
Document type	• Scale	Fi	ormat	
Workflow				]
Creation date 📰	Created by		Status	•
Checked on 📰	Checked by	8		
ſ Index	_			
Index date 📰	Index creat	tor	Index text	
File name	Origi	'n		Based on

Where-used lists for documents

Like the Article detail masks, the Document detail masks now have a **Use** tab that contains a documents whereused list based on the HELiOS result list technology.

Choose  $\P > Use$  to activate this tab.

Copy number

The new context menu function **Copy number** enables you to copy the designation of a HELiOS object (Document number, Article number, Folder name, Project, Material designation) to the Clipboard, e.g. to paste it from there to other applications with only a few mouse clicks.

Ø	Create derivation, with link
	Output
Q.	Show Version Management
	Print linked document
<b>(</b>	Call report
#	Copy number
R	Copy HELiOS URL
P	Show ID
	Edit
×	Delete

## Major Release 2019 (V 2400)

Support of SQL Server 2019

HELiOS 2019 supports the new SQL Server 2019.

#### Integrated preview for standard image formats

Image formats such as JPEG, TIF, BMP, PNG, etc. which have been saved as documents to HELiOS can now be displayed by the new, integrated graphic viewer of HELiOS.

You can zoom into graphics and move the selected detail at any time. This allows an easy representation of neutral formats and reduces the number of external viewers that may be required.

#### Workspace

As of HELiOS 2019 the **Workspace** that you already know from the Multi CAD and Office interfaces will be available to you in the HELiOS Desktop, too.

Click on the Show workspace icon on the General Ribbon tab to open the HELiOS Workspace dialogue window.

Here, all documents of the session will be listed. Documents that are opened and/or edited via the HELiOS Desktop will be stored in the workspace directory.

This will constantly provide you with a clear overview of the corresponding HELiOS objects, so that you can check them into the database when required. When closing the HELiOS Desktop a question regarding the handling of objects that are still in the Workspace will be displayed.

	Carr	Tind.	Innet	0	Admin Tools		
<u>~</u> `	Gen	eral Find	Input	Output	Admin Tools		
R	0			SP			
il 10				HELIOS			
witch user	Act as proxy		Show workspace	Options			
	gin/Loo		Workspace	Options			
_	2 H	ELiOS Worksp					_ 🗆 ×
/ Proje	ec 👍	Standard	1	• //			
Find							
	=	Changed, loca	al Document r	number	Release status	Document type	File changed on
PI	N.	1 San	🔮 DN-0002	252	OStatus: In progress, Workflow: general document	Office document	10.01.2019 11:08:49
Name	12		Docume	nt1.docx	Status: In progress, Workflow: general document	Office document	10.01.2019 11:08:29
				nt2.docx	Status: In progress, Workflow: general document	Office document	10.01.2019 11:08:38
				nt3.docx	Status: In progress, Workflow: general document	Office document	10.01.2019 11:08:56
		1	Folder1.	xlsx	Status: In progress, Workflow: general document	Office document	10.01.2019 11:09:03
			Folder2.		Status: In progress, Workflow: general document		10.01.2019 11:09:32
							Þ

In the new **Changed**, **local** column the symbol indicates that a document has been changed locally and saved since its last synchronization with HELiOS.

# New dialogue windows

HELiOS 2019 comes with many modernized dialogue windows.

This concerns in particular the **Workflow** -related dialogues and sub-functions (e.g. the **Check list**, the **History** and the **Sub-workflow**) and the range of functions for **Links**, e.g. the assigning of templates for link classes.

🖘 🐺 Standard									
✤ 😽 Standard	•								
Name	Source class	Cardinality	Target class	Description		Release-relevance	Automation, source	Automation, targe	t
llgTyp-Variante	Bauteilversion	1:N	Bauteilversion	General type with sub-	types	Not release-relevant	Break up	Break up	
auteil(e)-Konstruktion	Bauteilversion	M:N	Dokumentversion	Model/Drawing with s	everal single parts	Not release-relevant	Take over	Take over	_[
auteil-Konstruktion	Bauteilversion	M:N	Dokumentversion	Model, Part/assembly	drawing	Target before source	Take over	Take over	
auteil-Teilegeometrie	Bauteilversion	M:N	Dokumentversion	3-D body, 2-D figure		Target before source	Take over	Take over	
onstruction unit	Bauteilversion	M:N	Dokumentversion	Construction unit		Not release-relevant	Take over	Take over	
ustomer drw. checkup	Bauteilversion	M:N	Dokumentversion		hich is released exists for part	Not release-relevant	Take over	Take over	
ustomer drw. not up to date	Bauteilversion	M:N	Dokumentversion	A customer drawing ex	xists for part, but is not up to date	Not release-relevant	Take over	Take over	
Customer drw. released	Bauteilversion	M:N	Dokumentversion	-	hich is released exists for part	Not release-relevant	Take over	Take over	
Customer drw. up to date	Bauteilversion	M:N	Dokumentversion	A customer drawing w	hich is up to date exists for part	Not release-relevant	Take over	Take over	_
ustomerdrawingpart	Bauteilversion	M:N	Dokumentversion	Part of a customer drav	wing	Not release-relevant	Take over	Take over	_
					- Templates for target class -				•
emplates for source class —	• <b>4</b> X				- Templates for target class -	- <b>4</b> X			•
emplates for source class — 🖘 👼 Standard	-	D			Standard	-			
	- 💠 🗙	Desigr Stan	dard de Part type	Release state Cre	Standard	-	igi Standard de Part t	ype Release stat	
emplates for source class —	-	Desigr Stan	dard de Part type	Release stats Cre	Standard	-	igr Standard de Part t	ype Release stat	

# Revised SmartSearch dialogue window

The dialogue window of the HELiOS SmartSearch has had a redesign and was adjusted to current standards.

Search term: Gearbox			
	SmartSearch Create Delete search index search index	lex	
	SmartSearch		
💽 SmartSearch			
Gearbox			▼ Find
🍫 👼 Stand	ard 👻		
Number	Release status	Index	Designation
- Article (2)	Status: In Progress, Workflow: part		Gearbox housing
💭 SN-000007	Status: In Progress, Workflow: part		Gearbox cover
		_	
Number of data	records 2		
Number of data	records: 2		
			Close

## New dialogue for unlocking of HELiOS objects

For unlocking of objects that are currently edited by other instances, the "ReleasedNext" tool was used in previous versions. This tool has now been replaced with a revised, integrated dialogue window that opens after starting HELiOS (or HiCAD) if such objects have been found.

The dialogue window can also be called by choosing Admin Tools > ReleaseNext (Administrator rights required).

Unlocking of I	HELiOS objects			
Article	× Documents × Projects	× Folders	×	
🤣 🐱 🚡	- 🔒			
Number	Designation	Creation date	User	
应 AN-100/06	Slip-on gear mechanism	03.10.2006	Administrator	
Number of data	a records: 1			
			Unlock	all Close

## Workflow - Send E-mails with notes

In the action list for Role Workflow steps you can now determine that in the case of certain Workflow steps (e.g. Request checkup or Release), E-mails are automatically sent to relevant users.

The note commenting on a Workflow status can be sent together with the E-mail in the process.

🙀 Edit Workflow status -	part (R): SN-026	882
- Current status In Progress Check • Rea	ad 👄 Write 👄 De	elete
		Notes:
- Next status		This comment will be integrated into E-mails
- Objects with require	d workflow statu	is change
Links Fol	ders	
🖘 褼 Standard	•	
Number	Release status	Link designation with Shi Inc
Number of records: 0		
ت: ۱ و و		Execute Close

In the EDBSETUP action list of the corresponding Workflow step, enter the placeholder **<\$EDBNOTE>** for the into the comment field of the **E-mail action** dialogue window that will open when you click on the Send E-mail button. The note will then appear in the E-mail.

ſ	Action	ist	
	Wor	kflow	
	Cy	E-mail action	
Released	Cyi Ste	E-mail action	ion database attribute hange owner hange group tart process ge access grants Send E-mail a folder document te Folder Article ate sub-folder initialise role
"rele		Add further receivers	DK Cancel
		Send document as attachment	
		OK Cancel	

## Option for mandatory project/folder selection

In some cases it makes sense to restrict access to particular projects and/or folders of the HELiOS database for particular users or user groups - e.g. external suppliers that have been integrated into the system.

This can be achieved by deactivating the new permissions function**Work folder-independent** or **Work project-independent** in the Management of the **EDBSETUP** for particular users.

ecco	HELiOS Configuration
ľ	Group Management
Ľ	Group
	Process Planning
	Add Delete Edit
	Group members
	MembersStatusEditAdministratorUnit manaChief DesignerObserverDesigner1ObserverDesigner2ObserverhicadUnit manaManager PPUnit manaProcess Planner1Unit manaProcess Planner2Unit mana
	Group functions          Assignment       Edit         view material       view parts         view parts       view parts         view pipe class       view projects         Work folder independent           Work project-independent
	Close

Users who do not have that permission will not have the possibility of project-independent or folder-independent views, searches or inputs any more , since the corresponding buttons or selection options do no longer exist in the HELiOS user interface.



Already existing users and user groups will automatically receive the new permission after an update of the existing database.

### Changeability of old indices by Administrator

The new database option (HELiOS Options > Database > General > Changeability of old indices by Administrator enables Administrators to edit old indices. This concerns both meta data and the relevant files, and will also take effect when saving documents in interfaced CAD systems and importing files in the HELiOS Desktop.

р	🥕 General 🛛 ಶ HiCAD 🛛 🏭 AUTOCAD 🗎 🗊 SolidWorks 🛛 🜌	Inventor	
s; :s	General settings	CAD System	
0	Revise the new document.	No	
in	Print only released documents	No	
in	Optional Drag Drop for follow-on sheet	No	
P I	Vault Server	No	
0	Allow forced releases	Yes	
2	Test statuses in role workflows can be ignored	No	
9	Link E-mail	E-Mail Attachment	
at	Apply workflow of last state for revision	Yes	
	Issue error message for undetected master data objects	No	
oc	Article attribute for defined weight		
2	Article attribute for surface area	FLAECHE	
:	Article attribute for material (weight-relevant)	MATERIAL	
	Article attribute for body volume (weight-relevant)		2
	Article or material attribute for specific weight	RHO	
	Master link for product structure		E
	Default language	en	-
	Default RMS file for product structure output	PRODUCT_Stahlbau_01	
	Attribute links in search masks	No	
	Multiple classification for articles	No	
	Consider only active group when determining user rights	No	
	Show documents without access permission	Yes	
	Show articles without access permission	Yes	
	Show projects without access permission	Yes	
	Show folders without access permission	Yes	
	Show pipe classes without access permission	Yes	
	Show user-defined objects without access permission	Yes	
	Update PDM items during product structure sync	No	
	Allow updating of released product structures	No	
	Changeability of old indices by Administrator	Yes 🔻	-
		No	
		Yes	

# **HELiOS Spooler**

Service Pack 2 (V 2402)

### Model area of AutoCAD drawings

When printing AutoCAD drawings (older versions) the model area of the drawing can be printed automatically if the layout area is empty.

You can configure this behaviour via the configuration file **AddIn.AutoCad.Config.xml** (this file will be automatically updated to the new configuration format by the Spooler).

Please also read the information given in the Notes on File Conversion via the Spooler topic.

### Configurable restart of CAD application

In previous versions, the appropriate CAD applications were restarted for each print or conversion job. This behaviour can now be configured, resulting in shorter processing times and a faster printing of the desired printout or file.

## Service Pack 1 2019 (V 2401)

### Combining of different PDFs into one document

The HELiOS Print Client now contains a new option for the **Postprocessing** of print jobs, which allows you to combine individual PDF pages into one document during automated print job processing.

	-ISD FilePrinter (Postprocessing)	
Configuration:	PDF Conversion (combined PDF per batch)	-

## Pausing the Spooler

You can now pause and continue the Spooler, either interactively via the Admin Tool or via command prompt. New jobs will also be accepted while the Spooler is pausing (however they will not be processed during that period - their processing starts as soon as the Spooler is continued again).

The control via command prompt can be used for a time-controlled pausing and continuation of the Spooler, e.g. via Windows task planning.

2	😆 HELiOS Spooler Admin Tool							
	- Jobs							
		<b>*)</b> (	Pause job p	rocessing				
	Document number	File format		Creation	Execution	Status	Туре	
	躍 DN-013722	SLDDRW	Administrator	17.05.2019 17:14:33	17.05.2019 17:09:22	🎻 Completed	Print job	

# Major Release 2019 (V 2400)

Inventor: Export of image formats and optional database connection

Image formats such as JPEG or BMP can now also be (automatically) output from Autodesk Inventor via the HELiOS Spooler by means of suitable conversion jobs.

To be able to use the new attribute mapping for the filling in of title blocks in Inventor during the output via Spooler, you have also the option to configure a database connection for the HELiOS Spooler.

# **HELiOS MS Office Interface**

Service Pack 2 (V 2402)

## Model structure: Display of document structure

If only a document structure instead of a model structure is available for a document, the HELiOS-MS Office /Excel) interface displays the document structure, according to the document master data, on the **Model structure** tab.

🕙 Current document: DN	-013587				- 0	Σ3	Current docur	ment: DN-013858
A E	3 C	D	E	F	G		A	B C
1 Reference:	42						1 x:	21
2							2 y:	21
3							3 Sum:	42
4	PN-013857 (Doc				-	-		
5	PN-013857 (Doc	cument)						
6	General Assig	nments In	put Output					* 📀
7	Edit master dat	ta rbeiten 🛛	Edit Workflow	status veiten	222223	5		
8	Preselect		Roles			Z	$\Rightarrow$	
9	🗁 Open + Edit	_	Attribute valu	PC	Notes document •	Mark-up	Export file	Import Edit
10	- open - cure		g Attribute Fuld	General	uocument •	•	me	111C +
11			1					
12	Targets	× Sources	× Fold	lers ×	Projects	× An	notation $\times$	Model structure 🗙 💠 🔻
13	standard 🍜 😽		- 1 -					
14								
15	Document			In W Designa	tion			
16	DN-013857			K Folder1				
17	DN-013858		<b></b>	K Folderz				
18								
19								
20								
21								
22								
23								
24	Number of records	: 2						
25	C		_	▼ 2F		-		
Sheet1 Sheet1	neet2 / Sheet3 / 🕈	]/			· · ·	<b>▶</b> ∎.≓∏	TRAFH S	Sheet1 Sheet2 Sheet3

#### Documents in the Workspace

The HELiOS Workspace window is now available in both the HELiOS Desktop and in the CAD or MS Office interfaces.

Irrespective of all filter options you can apply, the following rules apply for the display behaviour:

All documents that have been opened/loaded in the active application will be displayed, as well as all non-loaded documents that have been saved to the application with which the documents were originally created.

This means: As soon as a document is opened in an interfaced application, the corresponding Workspace will memorize this until the document will be removed from the Workspace again. The corresponding document will therefore be constantly displayed in the Workspace, also after closing and restarting the application.

When opening a particular document in two different applications (e.g. a DWG file in AutoCAD and Inventor), the HELiOS Workspace memorizes both applications and displays the file in the Workspaces of both applications.

Also, the following rule applies: For an Inventor assembly that references an Excel document, both the Inventor documents and the Excel file will be displayed in the Workspace after opening the assembly in Inventor. If the Excel file has previously been saved in the Office application (setting the document attribute "Related application" (HEL\_ APPLICATION) accordingly), this file will be additionally visible in the Workspace of Excel, even if it has not been explicitly loaded in this application by the user.

An exception to this rule is the Workspace of the HELiOS Desktop that always displays all documents.

Service Pack 1 2019 (V 2400)

Office 2019 and support of multiple versions HELiOS 2019 SP1 supports offers an interface to MS Office 2019.

# **HELiOS CAD/CAE Integrations**

Service Pack 2 (V 2402)

### ZUKEN E3 interface

HELiOS 2019 Service Pack 2 can be interfaced with the ERP system ZUKEN E3.

### New Workspace

The new HELiOS Workspace window with improved performance is now available in the HELiOS Desktop, the CAD and MS Office interfaces.

₿ ŀ	# HELIOS WORKSPACE									
4	🕨 💌 Sta	andard		• / 🔘	$\otimes$ $\times$					
	Loaded	Chang	Open	Document number	Designation	Article number	Designation	Workflow status		
12	✓ ●		Þ	DN-000253		SN-025783	Framework	•		
12	~		De la	TN-000254	Production drawing	SN-025784	Test article r. pts.	•		
12	1		D.	TN-000255	Production drawing	SN-025785		•		
12	~		-	acadiso.dwt	Production drawing	SN-026061		•		

Irrespective of all filter options you can apply, the following rules apply for the display behaviour:

All documents that have been opened/loaded in the active application will be displayed, as well as all non-loaded documents that have been saved to the application with which the documents were originally created.

This means: As soon as a document is opened in an interfaced application, the corresponding Workspace will memorize this until the document will be removed from the Workspace again. The corresponding document will therefore be constantly displayed in the Workspace, also after closing and restarting the application.

When opening a particular document in two different applications (e.g. a DWG file in AutoCAD and Inventor), the HELiOS Workspace memorizes both applications and displays the file in the Workspaces of both applications.

Also, the following rule applies: For an Inventor assembly that references an Excel document, both the Inventor documents and the Excel file will be displayed in the Workspace after opening the assembly in Inventor. If the Excel file has previously been saved in the Office application (setting the document attribute "Related application" (HEL\_ APPLICATION) accordingly), this file will be additionally visible in the Workspace of Excel, even if it has not been explicitly loaded in this application by the user.

An exception to this rule is the Workspace of the HELiOS Desktop that always displays all documents.

#### Improved attribute mapping

The user interface of the attribute mapping for data synchronization between CAD and HELiOS has been further improved.

There is now a filter option for a faster retrieval of result list entries, and for multi-language attributes you can now just select the desired language.

Recently edited attribute assignments are marked in the overview with a  $\checkmark$  symbol, added new attribute assignments with a  $\checkmark$  symbol and deleted attribute assignments with a  $\bigstar$  symbol.

X	Attribute	assignments	for	import to	HELIOS
---	-----------	-------------	-----	-----------	--------

Type:	: 🔄 🔨 💽 👘					
Filter:	× •	•				
	Source	Target				
+	Date of modification	Date of modification (HEL_GEAENDERT_DATUM, Article)				
12	Designation	<>> Designation (BENENNUNG, Article)				
	Material	<> Material (WERKSTOFF, Article)				
	Weight	<> Weight (GEWICHT, Article)				
X	Volume	<> Volume (VOLUMEN, Article)				
-		<b>—</b> ——				

Changes will only take effect after clicking on Apply in the Attributes assignments window or closing it with OK.

If errors occur during attribute synchronization, e.g. because an attribute has been deleted or renamed by mistake and can therefore not be found, this will be indicated in the corresponding field of the result list by a 3 symbol.

Target
<>> Length (LAENGE, Item)
🔹 🔕 Comment (BEMERKUNG, Item)

Furthermore, application-specific characteristics, such as the area selection in AutoCAD, will be considered by the attribute mapping.

# Please note:

For system paths and file names / file extensions the attribute mapping does not distinguish between upper case and lower case letters.

# Service Pack 1 2019 (V 2401)

#### Simultaneous support of different CAD versions

If you work with different versions of a CAD software on the same local system, you have now the option to install the multi- CAD interface to HELiOS for all versions simultaneously. For this purpose, the installation menu shows you all versions of CAD applications in a dialogue window for selection that exist in the system.

In other words: If several versions of an application exists on a system, you can choose which of them you want to interface with HELiOS.

Extended settings					
HELIOS HELIOS Interfaces	General				
<ul> <li>CAD</li> <li>AutoCAD<sup>®</sup></li> <li>Inventor<sup>®</sup> 2016</li> <li>Inventor<sup>®</sup> 2018</li> <li>Inventor<sup>®</sup> 2019</li> <li>Navisworks<sup>®</sup></li> <li>SOLIDWORKS<sup>®</sup></li> <li>Zuken E3<sup>®</sup></li> <li>Microsoft Office<sup>®</sup></li> <li>Others</li> </ul>	Not installed Not installed				
32 bit ReportManager benutzen      OK Save Cancel					

### Taking the original application into account when loading and saving documents

From HELiOS 2019 Service Pack 1 onwards, the original application with which a document was created will be transferred as a document attribute when the document is saved.

This ensures that the document will be opened (e.g. for their editing via HELiOS result lists) with the same application with which they were created / saved.

This is also an advantage when working with file formats that could have been created by several applications installed on the system, such as DWG and DXF files associated with AutoCAD and Inventor.

If the corresponding hint is missing, e.g. because the file has been transferred to an older HELiOS version, the application that is registered in your Windows system as the standard program for this purpose will be used.

# **HELIOS in HiCAD**

# Service Pack 2 2019 (V 2402)

## New icons for HiCAD file formats

From SP2 onwards, new icons for the different HiCAD file formats e.g. SZA, FGA, KRA, VAA, PAA are available. These icons will be shown in the HELiOS result lists.

🍫 褼 🍓 Standard			• 🏾 🧏 👘					
N Document number	Sheet	Index	Designation	Document type	Release status	File changed on	Creation date	ι
> 2000 246				HiCAD Drawing	In Progress	08.04.2019 17:26:05	08.04.2019	A
DN-000255			Mark-up		In Progress	08.04.2019 18:06:43	08.04.2019	A
> 2 DN-000001	1		Assembly drawing	HiCAD Drawing	In Progress	24.10.2006 17:55:56	02.10.2006	K
> 2 DN-000002	1		3-D model	HiCAD Part/Variant	In Progress	15.02.2019 13:49:01	02.10.2006	K
> PDN-000003	1		Assembly drawing	HiCAD Drawing	In Progress	24.10.2006 17:55:59	02.10.2006	K
DN-000004	1		3-D model	HiCAD Part/Variant	In Progress	15.02.2019 13:49:01	02.10.2006	K
> DN-000005	1		Assembly drawing	HiCAD Drawing	In Progress	24.10.2006 17:56:02	02.10.2006	K
> DN-000006	1		Assembly drawing	HiCAD Drawing	In Progress	24.10.2006 17:56:04	02.10.2006	K
> DN-000007	1		Assembly drawing	HiCAD Drawing	In Progress	24.10.2006 17:56:06	02.10.2006	K
> DN-00008	1		3-D model	HiCAD Part/Variant	In Progress	02.10.2006 17:19:59	02.10.2006	K
> DN-000009	1		Production drawing	HiCAD Drawing	In Progress	24.10.2006 17:56:13	02.10.2006	K
> DN-000010	1		3-D model	HiCAD Part/Variant	In Progress	02.10.2006 17:23:18	02.10.2006	K
> DN-000011	1		Production drawing	HiCAD Drawing	In Progress	25.10.2006 09:48:15	03.10.2006	K
> DN-000012	1		3-D model	HiCAD Part/Variant	In Progress	03.10.2006 13:30:26	03.10.2006	К
>DN-000013	1		Production drawing	HiCAD Drawing	In Progress	24.10.2006 17:56:21	03.10.2006	K

Number of records: 32

	File format	File type	
2	.SZA	HiCAD model drawing	
<b>P</b>	.KRA	HiCAD 3-D part	
	.FGA	HiCAD 2-D part	
$\mathbf{R}$	.VAA	HiCAD variant	
?	.PAA	HiCAD part archive	
	.RPA	HICAD P+ID	

Service Pack 1 2019 (V 2401)

Article master sync when saving



The Article master sync when saving that you use to specify which HiCAD part attributes are to be synchronized with which HELiOS article master data has been moved from the **Drawing** tab to **HELiOS PDM** at **Others** > Link > ....

## Major Release 2019 (V 2400)

#### Automatic transfer of product structure and article master attributes upon saving

In the **Configuration Editor** you can specify whether 1.) Changes to the product structure and 2.) HiCAD part attributes in the HELiOS article master are to be synchronized upon each saving in HiCAD.

1.) Auto-sync product structure upon saving:

Go to **PDM > HiCAD-HELiOS interface > Product structure** and activate the **Synchronize product structure upon saving** checkbox:

S 🕄   🏗 🛿 🕄 🕄	A ()			
			User Administrator 👻 🧟	
HiCAD	Description	Value	Comment	
Active configuration (Base configuration)	AutoSave corrected parts	2	0=No 1=Yes 2=Ask user	
<ul> <li>Drawing</li> <li>Automatic drawing derivation</li> <li>Modelling</li> </ul>	Transfer product structure attributes to part attributes when updating HELiOS attributes	<b>V</b>	Transfer product structure attributes to part attributes when updating HELiOS attributes	
<ul> <li>Steel Engineering</li> <li>Metal Engineering</li> </ul>	Semi-finished product article as sub- item		When transferring the product structure, add semi- finished article (if any) for individual parts	
Profile installation	Synchronize product structure upon saving	V	Transfer changes to product structure to HELiOS upon saving?	
<ul> <li>Profilverlegung</li> <li>Plant Engineering</li> <li>Sheet Metal</li> <li>Assembling simulation</li> <li>Analysis</li> <li>Interfaces</li> <li>PDM</li> <li>Management+BIM</li> <li>HiCAD-HELiOS interface</li> <li>Product structure</li> <li>Compatibility</li> <li>System settings</li> <li>Configurations</li> </ul>				

After this, any changes to the product structure will be automatically transferred to HELiOS after each saving in HiCAD. This spares you the additional step of a manual transfer.

2.) Auto-sync part attributes and article master data:

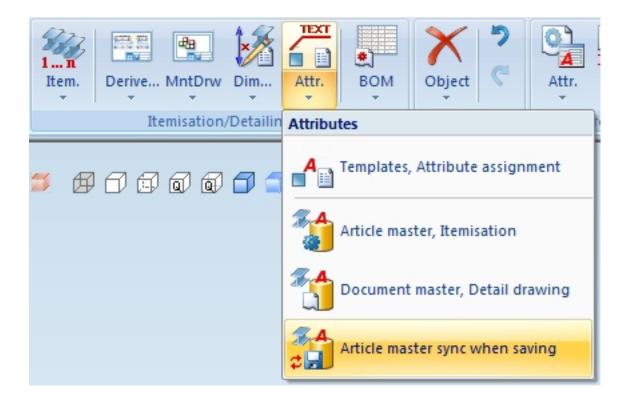
In the Configuration Editor, go to System settings > HELiOS and activate the Transfer part attributes to HELiOS:

📑 ISD Configuration Editor - HiCAD 24.0.0.142 [C:\ProgramData\ISD Software und Systeme\HiCAD 2019\HiCAD.cfgdb]								
File Edit View Extras ISD								
/ 🕥 🖉   🚏 📴 🔡	<i>8</i> 4	0 _	User Administrator 🗾 🕂 🦉					
🔺 🥅 System settings 🔷	Description	Value	Comment					
Assembly HCM	DB project	From document management 🔹	Database project					
Sketch HCM Itemisation	🥖 Check default DB links	Check with query before correction, with main p 🔻	Check database connection (and correct if required)					
Processing plane	HELiOS/HiCAD Default Solution							
Sketches Start configuration	Handling of article master	Query	Handling of manually assigned article master during exchanging of semi-finished products					
<ul> <li>Directories</li> <li>Load/Save</li> <li>Data save</li> </ul>	Taking over of semi-finished product attributes	Collection	Which semi-finished product attributes are to be taken over to manual article masters ? (Format : Semi-finished product attribute;Article attribute)					
Identification	Attributes for BOM via product structure	Only selected attributes 🗸	Selection of attributes to be transferred for BOM transfer via product structure					
Referencing     Annotations	Transfer part attributes to HELiOS		Transfer part attributes of changed parts to article master upon saving					
Calculations								
📰 Graphic								
Visualisation								
E Feature								
Miscellaneous								
Catalogue								
III Standard Parts								
III HELIOS								
Configurations								
< >	* III +							
System settings > HELiOS								

Changes to article master-relevant part attributes, will then be automatically taken over to HELiOS upon each saving in HiCAD.







Attribute configurati	on settings	×
Module name:		
HiCAD-HELIOS attrib	ute synchri	Overwrite existing
Configuration:		
HiCAD-HELiOS trans	ifer 🗾 📘	Create new ( Remove )
		Part assignment
Attribute label	Attribute	) (Template
Designation Designation 2	BENENNUNG BENENNUNG2	%TA(\$01) %TA(\$02)
Weight	GEWICHT	%TA(§01)
,	ſ	OK Cancel

New dialogue for unlocking of HELiOS objects

For unlocking of objects that are currently edited by other instances, the "ReleasedNext" tool was used in previous versions. This tool has now been replaced with a revised, integrated dialogue window that opens after starting HELiOS (or HiCAD) if such objects have been found.

Unlocking of HEL	LiOS objects			_ <b>_ X</b>
Article ×	Documents × Projects	× Folders	×	
s 🐱 🍓	- 🔒			
Number	Designation	Creation date	User	
DAN-100/06	Slip-on gear mechanism	03.10.2006	Administrator	
Article ×				
Number of data re	cords: 1			
			Unlock	all Close

### Excel BOM with bar optimisation

Similar to the Excel BOM output from HiCAD, a new BOM template called **PRODUCT\_ISD\_HiCAD** is now available, which allows the output of bar optimisations for BOM exports via product structure.

	А	В	С	D	E	F	G	Н
1		Bar	list					
2								
3		Assy. No.		IheaderIHEL	SACHNUMMER!	Created by	IheaderIHEL_USER!	۵
4		Designatio	n	IheaderIBEN	ENNUNG!	Created on	IheaderIHEL_GUELTIGI	
5								HELOS
6								
7								
8	!BarH	eader!				!BarCount!	!BarWaste!	
9	ltem	Number	Ler	ngth (mm)	Cut (Web)	Cut (Flange)	Designation	
10								
11	Itable Pro	Itable!%Anz	!table!B	auteil.LAENGE!	!table!Bauteil.COMPONENT_CUTT	!table!Bauteil.COMPONENT_CUTT	Itable!Bauteil.BENENNUNG!	

### Pre-mounted assemblies in BOMs

When working with pre-mounted assemblies in practice, you sometimes want only the assemblies, but not their sub-parts to be shown in BOMs. This can be achieved via the article attribute **COMPONENT\_PREINSTALLED**, which needs to be assigned to the article master of the pre-mounted assembly.

HELIOS	S Attribute management	: Article			1				
Desi	ignation	Name	Data type	Length	Object	•	Name	Object	
COM	PONENT_PREINSTALLED	COMPONENT_PREINSTALLEI	) BOOL		Article (Head)		COMPONENT PREINS	TALLED Article (Hea	d) 🔻
	IPONENT_ITEMNR_TEXT	COMPONENT_ITEMNR_TEXT	VARCHAR	80	Article (Index)		, -		·
	IPONENT_ITEMNR	COMPONENT_ITEMNR	INTEGER		Article (Index)		Designation		
		COMPONENT_HICAD_VERSI		60	Article (Index)				
	IPONENT_DSTV_TYPE	COMPONENT_DSTV_TYPE	VARCHAR	2	Article (Index)		]	en	
	IPONENT_CUTTYPE_WEB	COMPONENT_CUTTYPE_WE		30	Article (Index)		Description		
	IPONENT_CUTTYPE_FLA			30	Article (Index)				
	IPONENT_COUNT	COMPONENT_COUNT	INTEGER		Article (Index)				
	PONENT_COATING_TYPE			255	Article (Index)				
	n A-web CH ZUSCHNITT L	PROFIL_ASTEG BLECH ZUSCHNITT L	FLOAT FLOAT		Article (Index) Article (Index)		1		
	CH_ZUSCHNITT_L	BLECH_ZUSCHNITT_E BLECH_ZUSCHNITT_B	FLOAT		Article (Index)		General	Selection list	Copy for
	rdupois weight per length	HANDELSGEWICHT M	FLOAT		Article (Index)		Mandatory	C Suggestion	Change
	rdupois weight per lengun	HANDELSGEWICHT	FLOAT		Article (Index)		□ No update	C Predefined	✓ Derivation
	le type ID	BTKENNUNG	VARCHAR	30	Article (Index)		j No update		
	le type 10	HEL TYPNAME	VARCHAR	80	Article (Head)			None 💿	Follow-on shee
	le number	HEL SACHNUMMER	VARCHAR	80	Article (Head)	_		Values	
	le ID (Head)	HEL_KOPFID	VARCHAR	30	Article (Head)			Valaco	
	trarily divisible	BELIEBIG TEILBAR	VARCHAR	10	Article (Index)	=			
	e top/right - YZ	PROFIL SCHNITTW 1YZ	FLOAT		Article (Index)		Data type BOOL		Transfer data
Angl	e top/right - XZ	PROFIL_SCHNITTW 1XZ	FLOAT		Article (Index)		,	_	
Angl	e bottom/left - YZ	PROFIL_SCHNITTW2YZ	FLOAT		Article (Index)		Single value Mu	Itiple values: C Prede	efined C Free
	e bottom/left - XZ	PROFIL_SCHNITTW2XZ	FLOAT		Article (Index)	-	Single value Mu	Tuple values: O Prede	erined IV Free
	e 2 of cutting nattern	PROFIL SCHNITTW2	FLOAT		Article (Index)	P. 1	Text for condition tru		
						•		-	-
Nam		Class	escription				. 1		
Nam	le l	Jass Di	escription				Text for condition fals		
								e	-
							0		
1									
						,			
India	es (Key)								
	rticle UNIQUE:					~			
HE	L_INDEX, HEL_SACHNUMN	IER(Index:, Article number)				-	New	Delete	Change
							TACAN		Change
	1	1		1				1	
	Manage indices	Attribute link	List init values				OK	Cancel	End

To ensure that the attribute will be shown in the HELiOS article data mask, you need to adjust the masks in HELiOS with the Mask Editor accordingly; that is, you need to add the **COMPONENT\_PREINSTALLED** attribute as a new data field and, in so doing, create a new checkbox. If this checkbox is activated in the article master of an assembly, this assembly will be regarded as a "pre-mounted" assembly.

## Loading of the current article master of semi-finished products in attached parts

In previous versions, existing article masters of semi-finished products were not transferred to HiCAD when inserting attached parts such as Steel Engineering connections, stairs, railings, element installations, profile installations etc.

From HiCAD 2019 onwards this behaviour can be changed via a setting in the Configuration Editor: At PDM > HiCAD-HELiOS Interface you can find the parameter Add semi-finished product article when loading. The ISD default setting is No, i.e. the article master of semi-finished products will not be transferred.

🖪 ISD Configuration Editor - HiCAD 24.0.0.107 [C:\Prog	gram[	Data\ISD Software und Systeme	\HiCAD 2019\I	HiCAD.cfgdb]	
File Edit View Extras ISD					
∥ 🕥 🛱 🕴 🕮 📲		AA 🛛 🞯 🖕		User Administrator	- 🧟 🚬
Assembling simulation	*	Description	Value	Comment	
<ul> <li>Analysis</li> <li>Interfaces</li> </ul>		Add semi-finished product article when loading	No	If there are parts without article master, s articles will be added	semi-finished product
⊿ III PDM		Load locked documents in read-only mode?	Ask user 🔻	Behaviour when loading locked docume	ents
<ul> <li>Image: Management+BIM</li> <li>Image: HiCAD-HELiOS interface</li> </ul>		Synchronize drawing with main part	Yes 🔹		
Compatibility	=				
System settings					
Configurations	*				
PDM > HiCAD-HELiOS interface					
PDM > HICAD-HELIOS Interface					

For example, when transferring article masters of semi-finished products from user-defined catalogues, set the parameter to **Yes**.

# **HELiOS** for AutoCAD

Service Pack 2 (V 2402)

New functions and options in the HELiOS-AutoCAD interface

Service Pack 2 of HELiOS 2019 offers a number of new functions for the HELiOS-AutoCAD interface.

Functions known from other CAD interfaces have been added to the Ribbon, e.g. the **New in HELiOS** function that allows a convenient transfer of CAD model structures to the HELiOS database, and functions for the updating of loaded documents to newer Server states.



Furthermore, the **HELiOS Options** dialogue now contains new setting options for the loading and saving behaviour of documents.

In HELiOS 2019 Service Pack 2 the AutoCAD interface was adapted in many areas to the Inventor interface. For instance, it now also offers options for controlling the updating of XRefs.

3 HELIOS Options	-	×
– Settings for the Workspace		
Local directory of documents:		
C:\Users\Administrator\AppData\Local\ISD Software und Systeme\SESSION732heliosa	ai3\rot_0	
Remove documents that are currently not being edited from Workspace after closing the ap     Remove locally changed files	pplication	
- Settings for the Document		
Behaviour when opening:         Set to edited mode         ✓ Update components         ✓ Query before updating         Behaviour when closing:         Automatic check-in for documents in edited mode         Update components to newer indices:         Never       Always         ● Not in released context         Behaviour when updating references to newer indices:         ● Update to newest index         Update to newest released index		
Attribute assignment Settings for: Transfer to HELiOS Export from HELiOS	Further	

## Attribute mapping

Attribute assignments for a **Transfer from AutoCAD to HELiOS** or **Export from HELiOS to AutoCAD** respectively, can now also be defined in AutoCAD via an extended configuration interface:

_			H Au	ELIOS •
	X HELIOS Options		× +	
🕅 🕅	ttribute assignments for export from HELiOS			—
ype:				Show column for Property ID
=ilter:	× •			
	Source	Target	Property ID	Condition
	<ul> <li>Designation (BENENNUNG, Article)</li> </ul>	PRT_BENENNUNG ({C21	6D55E-91A0- PRT_BENENNUNG	
	<ul> <li>Article number (HEL_SACHNUMMER, Article)</li> </ul>	SACHNUMMER ({C216D	55E-91A0-4E SACHNUMMER	
	<ul> <li>User (HEL_USER, Document)</li> </ul>	NAME ({C216D55E-91A0	-4BC5-AF58 NAME	
	Sheet (HEL_BLATT, Document)	BLATT ({C216D55E-91A0	-4BC5-AF58- BLATT	
	File name (HEL_DATEINAME, Document)	DATEINAME ({C216D55E	-91A0-4BC5- DATEINAME	
	<ul> <li>Designation, (BENENNUNG, Document)</li> </ul>	DOC_BENENNUNG ({C2	16D55E-91AC DOC_BENENNUNG	
	Document number (HEL_DOKUNUMMER, Document)	ZEICHNUNGSNUMMER	({C216D55E- ZEICHNUNGSNUMMER	
	<ul> <li>Replacement by (ERSATZDURCH, Document)</li> </ul>	ERSATZDURCH ({C216D	55E-91A0-4BI ERSATZDURCH	
	Replacement for (ERSATZFUER, Document)	ERSATZFUER ({C216D55	E-91A0-4BC5 ERSATZFUER	
	Creation date (HEL_GUELTIG, Document)	DATE ({C216D55E-91A0-	4BC5-AF58-9 DATE	
	Format (FORMAT, Document)	FORMAT ({C216D55E-91	A0-4BC5-AF: FORMAT	
	Checked on (GEPRUFT_DAT, Document)	GEPRUFT_DAT ({C216D5	5E-91A0-4BC GEPRUFT_DAT	
	<ul> <li>Checked by (GEPRUFT_NAM, Document)</li> </ul>	GEPRUFT_NAM ({C216D	55E-91A0-4B GEPRUFT_NAM	
	<ul> <li>Weight (GEWICHT, Article)</li> </ul>	GEWICHT ({C216D55E-9	1A0-4BC5-AF GEWICHT	
	<ul> <li>Scale (MASSTAB1, Document)</li> </ul>	MASSTAB1 ({C216D55E-	91A0-4BC5-4 MASSTAB1	
	<ul> <li>Standard created on (NORM_DAT, Document)</li> </ul>	NORM_DAT ({C216D55E	-91A0-4BC5- NORM_DAT	
	Standard created by (NORM_NAM, Document)	NORM_NAM ({C216D55	E-91A0-4BC5 NORM_NAM	
	Project number (HEL_PROJNUMMER, Project)	PROJEKTNUMMER ({C2	16D55E-91A0 PROJEKTNUMMER	
	Drawing origin (ZNRURSPRUNG, Document)	ZNRURSPRUNG ({C216D	55E-91A0-4E ZNRURSPRUNG	
	Material (WERKSTOFF, Article)	WERKSTOFF ({C216D55E	-91A0-4BC5- WERKSTOFF	
	8 Row(s), 4 Column(s)	INDEX ({C216D55E-91A0	-4BC5-AF58- INDEX	
	Ocument number (HEL_DOKUNUMMER, Document)	Label ({C216D55E-91A0-	4BC5-AF58-9 Label	

Some application-specific characteristics must be observed here, e.g. the mandatory assigning of an Area in AutoCAD.

## **Optimized HELiOS Workspace**

The **HELiOS Workspace** dialogue window that is available to you in HELiOS-CAD interfaces has been revised and optimized.

i I	Helios Wo	ORKSPA	CE					
4	🕨 🐱 Sta	andard		• / 📀	$\otimes$ $\times$			
	Loaded	Chang	Open	Document number	Designation	Article number	Designation	Workflow status
12	✓ ●		2	DN-000253		SN-025783	Framework	•
12	1		Þ	TN-000254	Production drawing	SN-025784	Test article r. pts.	•
12	1		- 27	TN-000255	Production drawing	SN-025785		•
1	<b>v</b>		- 27	acadiso.dwt	Production drawing	SN-026061		•

If, after performing an update installation to SP2, the (old) Workspace still contains any documents, a message will be displayed, asking you to clear the Workspace and restart the application, so that the new Workspace can be called.

≥ -	Gen	eral Find	Input	Output	Admin Tools			
_				0.0				
47			⊴	×				
witch	Act as	Appoint	Show	HELIOS				
user	proxy	proxy	workspace	Options				
Lo	ogin/Loo		Workspace	Options				
Proj	ec 🚰 H	ELiOS Worksp	oace					
Find	*7	褼 Standard		• /				
	-	Changed, loca	Document r	number	Release status		Document type	File changed on
P	N.	1	🔮 DN-0002	252	⊙Status: In progress,	Workflow: general document	Office document	10.01.2019 11:08:49
Name	19		Docume	nt1.docx	⊙Status: In progress,	Workflow: general document	Office document	10.01.2019 11:08:29
			Docume	nt2.docx	⊙Status: In progress,	Workflow: general document	Office document	10.01.2019 11:08:38
_			Docume	nt3.docx	OStatus: In progress,	Workflow: general document	Office document	10.01.2019 11:08:56
		1	Folder1	xlsx	OStatus: In progress,	Workflow: general document	Office document	10.01.2019 11:09:03
l			Folder2	xlsx	OStatus: In progress,	Workflow: general document	Office document	10.01.2019 11:09:32
-								
	-		1					

Use the additional option Workspace to default position to dock the window into default position with a simple mouse click.

<b>^</b>	Administrator PDM Administrators		Open via HELiOS	Show/hide workspace	<b>X</b> Options	
	Connection		Show	ı/hide workspace		
HELIOS \	WORKSPACE		Work	space to default positi	ion	
1	Standard 🝷	w	orkspace to d	lefault position		
Load I	Lo Op Open + Edit		oves the Works ocked on the ri	pace back to the defa ight side)	ult position	
24		🕑 SIN	-025784	i est article r. pts.		<b>V</b>
2		-	-025785			0
2	🚬 🤤	💽 SN	-026061			💽 🔐

## Model structure: Display of product structure

If only a document structure instead of a model structure exists for a document, this document structure will be displayed in the Model structure tab of the HELiOS-AutoCAD interface.

DN-002744 (Document)	
General Assignments Inp	put Output
Edit Preselect Open master data + Edit • W	Edit Workflow status General
Mask × Model structure	e X Extended mask $ imes$ Graphic $ imes$ Targets
🖘 褼 Standard	
Document	O O In In W Designation
DN-002744	🔄 📂 a 😯 total.dwg
DN-002745	🔄 📂 b 🌟 😍 2 circles.dwg
DN-002746	🔄 📂 b 🌟 😍 circle.dwg
DN-002747	🔄 📂 b 🌟 😍 rectangle.dwg
DN-002748	🔄 📂 b 🌟 😍 circle and rectangle.dwg
DN-002745	🔄 📂 b 🌟 💽 2 circles.dwg
DN-002746	🔄 📂 b 🌟 😍 circle.dwg
DN-002747	🔄 📂 b 🌟 😍 rectangle.dwg
DN-002746	🔄 📂 b 🌟 😍 circle.dwg
DN-002747	🔄 📂 b 🌟 😍 rectangle.dwg

## Service Pack 1 2019 (V 2401)

#### AutoCAD 2020 and AutoCAD Mechanical 2019/2020

HELiOS 2019 SP1 supports Autodesk AutoCAD Version 2020, and AutoCAD Mechanical Versions 2019 and 2020.

## Bills of Materials

The HELIOS-AutoCAD Mechanical interface supports the creation of BOMs.

For this to happen, you just need to add two HELiOS attributes in your DWT template.

roperty	Heading	Data type	Value			Accuracy	Leading zero	^	Ne
MATNR	Raw material number	Text				1		_	
T_ME_1	BOM ME/F	Text						_	De
К	NH part classification	Text						_	14-
1ATERIAL2	Material 2	Text						_	Mo
TANDARD2	Standard 2	Text						_	
GEW	F-Weight/Pc.	Numerical				0.00	0.0	_	
GEW	R-Weight/Pc.	Numerical				0.00	0.0	_	
OM_UNITS	Units	Text						_	
EL ARTICLE HEAD	HELIOS HeadID	Text							
EL_ARTICLE_REV Click to add onent properties	HELIOS article revision BOM Part list Iter	Text			-			>	Adı
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EL_ARTICLE_REV           Click to add           onent properties           Property           ST_ME_1           TK           F_GEW           G_GEW           NAME	BOM Part list Iten Show command pr BOM ME/F NH part classification F-Weight/Pc. R-Weight/Pc. Name	n number			Move dov Remove	٧D		>	Adı

# **HELiOS for AutoCAD Mechanical**

## Service Pack 2 (V 2402)

New functions in the HELiOS-AutoCAD Mechanical interface

Service Pack 2 of HELiOS 2019 offers a number of new functions for the HELiOS-AutoCAD Mechanical interface.



Besides some new functions on the HELIOS Ribbon tab the HELiOS Workspace and attribute mapping is now available to you.

Also, the Product structure synchronization function that is already known from CAD systems such as HiCAD has been intergated into the HELiOS-AutoCAD Mechanical interface.

You can find it in the **Input** function group of the HELiOS Ribbon tab: **Lives** Transfer product structure (1-level).

– Part structure from	CAD		– HELiOS product struct	Jre
Q			Q	+ ↓a, ↑a,
SN-025784 ►		∽ ₽≣		<b>*</b> 9 ∓
, 1, SN	4, , Test article r. pts., , In progress, , , F025740, , Main support cpl, , In progress, Assembly, F000007, , Gearbox cover, , In progress, Part, , , , 2. F000002, , Clamping device, , In progress, Part, , , ,		5N-025784, ,	Test article r. pts.,, In progress, , ,
Properties X Ut	ilized articles X		Properties X Utilize	ed articles $ imes$ Utilized items $ imes$
Description	Value		Description	Value
Article number	SN-025784		Article number with icon	🕥 SN-025784
Index			Index	
Workflow status	📀 Status: In progress, Workflow: Part (R)		Workflow status	📀 Status: In progress, Workflow: Part (R)
Name	Test article r. pts.		Name	Test article r. pts.
Part type			Designation	
Designation			Standard designation	
Standard designation			Creation date	14.05.2019
Creation date	14.05.2019		User	Administrator
User	Administrator			

## Attribute mapping

Mit Service Pack 2 wurde die Attributmapping-Technologie der AutoCAD-Kopplung an den aktuellen MultiCAD-Standard von HELiOS angepasst.-

Für AutoCAD Mechanical bedeutet dies. dass zusätzlich auch Positionsattribute und Attribute für Teilereferenzen zwischen CAD-Applikation und HELiOS-Datenbank konfiguriert werden können.

# **HELiOS for Autodesk Inventor**

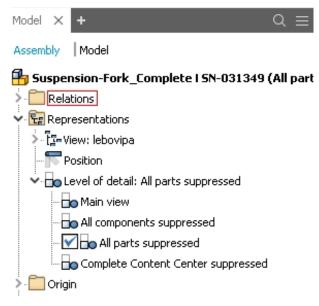
Service Pack 2 (V 2402)

Performance optimization and utilized Levels of details

In previous versions, some processes, e.g. the transfer of model drawings via the functions **New in HELIOS** or **Derive model structure** could take a long time for larger amounts of data.

The performance for such tasks could be increased significantly with HELIOS 2019 SP2.

Furthermore, after using the functions New in HELiOS, Update server state (or the automatic updating upon opening), Derive model structure, Create index and Batch reimport the level of detail will be called again that existed before calling the functions (and the resulting changes).



### New in HELiOS: Drawings

When saving drawings with the **New in HELiOS** function, referenced third party documents, too, will be considered, which can be linked to the drawing document and transferred to the database.

🍫 New in HELiOS	-	-	an L	
🐓 🖼 Standard 🔹 📲	Þ <sub>e</sub> 6	) () e, i <sub>o</sub>		
Create	Qty.	Article number	Document number	١
🖻 📸 💼 Drawing1_I3tbmd0i.idw	1	SN-056445	DN-032310	
A Microsoft-Excel Document.xlsx	1			

Please also note the different options you have when you save drawings: With the **New in HELiOS** function, drawings are created, complete with their models, as new documents with linked article(s), in the HELiOS database. The **New (Document / Find article)** function allows you to link further drawings to articles which already exist in HELiOS, instead of entering them repeatedly.

Furthermore, you can activate the additional **Create drawing and exchange models** function on the HELiOS Ribbon, which enables you to automatically exchange alocal part reference in a drawing with an already existing HELiOS article context of the corresponding part.

### Enhanced batch import

The **Batch import** function for models and drawings (as well as the Batch reimport function) now offer the option to import files via a text file list of file paths.

Use the **Automatic clearing of Workspace** checkbox to determine whether the affected files are to be removed immediately from the Workspace after carrying out the batch import. Activating this options makes sense if, for instance, a repeated loading of identical parts occurring multiple times in a drawing may affect the performance. Documents which are already located in the Workspace when the import is carried out are not affected by the clearing.

Furthermore, parts that have been changed and set to "edited" mode in the course of the procedure will also be "checked in", if the import for the drawing has been completed (if the **Automatic check-in** checkbox has been activated).

💱 Import	— D	×
🤜 🚭 💽 🔀 Automatic check-in 👘 🔲 Automatic clearing of Work	kspace	
File name	File extension	
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D:\Konstruktionsordner\Dampfmaschine\Zylinder kpl.iam	.iam	
D:\Konstruktionsordner\Dampfmaschine\Kurbelwelle_kpl.iam	.iam	
D:\Konstruktionsordner\Dampfmaschine\Steuerschieber_kpl.iam	.iam	
D:\Konstruktionsordner\Dampfmaschine\Kolben_kpl.iam	.iam	
D:\Konstruktionsordner\Dampfmaschine\Hauptständer_kpl.iam	.iam	
D:\Konstruktionsordner\Dampfmaschine\Exzenterstange_kpl.iam	.iam	
D:\Konstruktionsordner\Dampfmaschine\Lagerbock_kpl.iam	.iam	
D:\Konstruktionsordner\Dampfmaschine\Holzgrundplatte.ipt	.ipt	
D:\Konstruktionsordner\Dampfmaschine\Pleuel 1.ipt	.ipt	
D:\Konstruktionsordner\Dampfmaschine\Schieberplatte.ipt	.ipt	
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D:\Konstruktionsordner\Dampfmaschine\Stopfbuchse - Kolbenstange.ipt	.ipt	
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	OK Car	ncel

### Attribute mapping: Enhancement for file property with case differentiations

Attribute mappings of the type File properties with case differentiations can now be combined with Conditions.

In this way you can, for instance, distinguish the Part type of semi-finished products from that of parts or model drawings which are no semi-finished products.

#### ⅔ Attribute assignments for import to HELiOS

/pe:		- 🖶 🏲 🌓 🖉 🗎	
2	Source	Target	Condition
Artic	le (5)		
	Material	Workshop (WERKSTOFF, Article)	NoStandardAndNoSemiFinishedPart
1	Weight	Weight (GEWICHT, Article)	NoStandardAndNoSemiFinishedPart
	Volume	Volume (VOLUMEN, Article)	NoStandardAndNoSemiFinishedPart
(	Designation	<>> Designation (BENENNUNG, Article)	NoStandardAndNoSemiFinishedPart
I	File extension, with 2 case differentiations	Part type (COMPONENT_TYPE, Article)	NoStandardAndNoSemiFinishedPart



#### Please note:

Changes to the delivery state of HELiOS only take effect for new installations. Already existing attribute mappings of a system will not be overwritten by update installations.

#### Recogniton of semi-finished product master data by length

If a semi-finished product is inserted from the Inventor Content Centre "As Standard" and transferred to HELiOS, HELiOS will recognize the article master when inserting a second semi-finished product of the same type and will create a corresponding, new document.

This automatism has been enhanced by the fact that the HELiOS document master of a semi-finished product can also be recognized by a concrete semi-finished product length in order to prevent a renewed creation of a semi-finished product document with exactly the same length.

## Service Pack 1 2019 (V 2401)

#### Inventor 2020

The multi-CAD interface of HELiOS 2019 Service Pack 1 supports Inventor 2020.

#### Further enhanced attribute mapping

The bilateral mapping of attributes between Inventor and HELiOS (Inventor -> HELiOS / HELiOS -> Inventor) that has been introduced with the Major Release of HELiOS 2019 has been further enhanced.

You have now the option to edit invalid properties (e.g. field that have been marked as errors when something has not been unambiguously assigned) by double-clicking on the corresponding field.

You can define a fixed text serving as a separator between attributes.

Sourc	e ————		
- 7	🔨 👚 🔳 🎇 🏹 🛛 Con	verter:	
Value			
🗍 Art	icle number (HEL_SACHNUMMER,	Article)	
	🔩 Add fixed text		×
	Text:		
		OK Car	icel

#### Levels of detail

Inventor uses so-called **Levels of detail** to control which components are to be loaded into the memory or which of them are to be displayed.

When transferring parts to HELiOS (New in HELiOS, Batch import, Derive model structure), or using any function causing an exchange of parts, HELiOS will automatically use the main view.

All other functions work with the currently loaded parts and leave the non-loaded parts unchanged.

A prerequisite for a loading of parts for other levels of details that the main view is that the part has been completely transferred to HELiOS beforehand.

Level of detail: Main view
 Main view
 All components suppressed
 All parts suppressed
 Complete Content Center suppressed

During editing of such assemblies the following will happen: The parts that have been suppressed as a result of the chosen level of detail will remain unchanged in HELiOS (i.e. they will not be removed from the model structure either), new parts will be added to the model structure, and deleted parts will be removed from the model structure.

Functions such as Edit (all), Check-in (all) and Cancel (all) work with the non-suppressed parts.

When working with levels of details, you must confirm to switch to the highest level of detail (i.e. the main view) if you call the **New in HELIOS** or the **Derive model structure** function:

🎭 Level of detail	
Highest level of detail required for processing of structure in HELIOS. Activate?	
CANCEL	
Please note:	
Derived replacement objects are special cases that are currently not supported yet.	
Workspace settings	
You can now determine the path of the workspace directory yourself by clicking in the icon in the HELi Options dialogue window.	OS
℅ HELiOS Options - □ ×	
- Settings for the Workspace	
Local directory of documents:	
C:\Users\Administrator\AppData\Local\ISD Software und Systeme\SESSION732heliosai3\rot_0	
Remove documents that are currently not being edited from Workspace after closing the application	

#### Remove locally changed files

#### Switch user

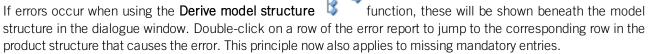
In the **Connection** function group of the HELiOS Ribbons you have the option to switch the current HELiOS user by logging in/out while the interfaced CAD application is running.

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File	First Steps	Tools	Vault	Autodesk A360	HELiOS
Data	Project c	<b>Eolder</b> c	Connection	Settings	
Data	Project C	Folder C	Connection	Settings	
			Administra	ator	-
			PDM Admir	nistrators	*
	lew		<table-of-contents> Switch</table-of-contents>	n user	
				Connection	

#### Creating indices when working in a document-oriented manner

If you work in a purely document-oriented manner, i.e. always without article masters, and assign a new index to a document master without a linked article master with the **Create index** function, HELiOS checks whether the underlying geometry is linked to a drawing. If a linked drawing is found, the document master of the drawing will also be offered for indexing, and, finally a link between indexed drawing and geometry will be created.

Derive via model structure





#### Option for product structure sync control when saving

In the **HELiOS Options** dialogue window, you can now activate or deactivate the automatic product structure synchronization when saving to HELiOS.

X HELIOS Options	-	×
– Settings for the Workspace		
Local directory of documents:		
C:\Users\Administrator\AppData\Local\ISD Software und Systeme\SESSION732heliosai3\rot_0		
Remove documents that are currently not being edited from Workspace after closing the application     Remove locally changed files		
– Settings for the Document –		
Behaviour when opening:		
Set to edited mode		
✓ Update components		
✓ Query before updating		
Do not update document again if it has already been loaded		
Behaviour when closing:		
✓ Automatic check-in for documents in edited mode		
Behaviour when saving		
Automatically transfer product structure		
Behaviour when transferring product structure:		
Insert semi-finished products from derived parts as sub-items		
Update components to newer indices:		
○ Not in released context		

For instance, after an initial product structure transfer in connection with an ERP system data transfer it is sometimes preferable to allow only one manual synchronization.

#### Creating semi-finished products as structure items

In the HELIOS Options dialogue window you can find the new option Insert semi-finished products from derived parts as sub-items beneath Behaviour when transferring product structure.

If this option has been activated, semi-finished product article masters (identified by the HELiOS **Part type** "**Raw part+Plant-design**") which are processed in Inventor as derived parts/assemblies (Derived Component), will be transferred as sub-items to the HELiOS product structure.

3 HELIOS Options	_	$\times$
- Settings for the Workspace		 
Local directory of documents:		
C:\Users\Administrator\AppData\Local\ISD Software und Systeme\SESSION732heliosai3\rot_0		
Remove documents that are currently not being edited from Workspace after closing the application     Remove locally changed files		
- Settings for the Document		
Behaviour when opening:		
Set to edited mode		
✓ Update components		
✓ Query before updating		
Do not update document again if it has already been loaded		
Behaviour when closing:		
✔ Automatic check-in for documents in edited mode		
Behaviour when saving		
✓ Automatically transfer product structure		
Behaviour when transferring product structure:		
Insert semi-finished products from derived parts as sub-items		
Update components to newer indices:		
Never      Always     Not in released context		
Behaviour when undating components to newer indices		

Inserted semi-finished product sub-items will be marked as "BOM-relevant" in HELiOS.

If it is not possible to clearly assign a dependent part of the HELiOS Part type "Raw part+Plant-design", no sub-item will be entered. The same applies to dependent parts of another Part type than "Raw part+Plant-design".

🗇 Processed beam   SN-031096	
> Bolid body(1)	
> tr View: Main view	
> - 🧰 Origin	
> 🕖 STN 425570 180-1000	
- 👩 Bore1	😑 🐠 SN-031096, , Processed beam, , In progress, Part
- 🔇 Part end	💱 , 1, SN-031049, , U-beam of hot-rolled steel Cl. 10 and 11, , In progress, Raw part+Plant-design

## Handling of standard parts

When choosing **Input > New (Document/Article)** to the **HELiOS** Ribbon tab you can now also transfer standard parts from the Inventor Content Center to HELiOS.

In the process, Family and Member IDs will be written into the HELiOS article master.

😳 SN-025835 (Article), Li	ink: DN-000306				- 🗆	×
General Assignment	s Input / Output					
	Edit Roles orkflow status General	Attribute values	Delete Edit			
Mask X Docum	nents $ imes$ Graphic	× Targe	ts × Sources	× Use	× Produ	ict stru
Article number: Project number:	SN-025835		Index:	I·S·D	3	Î
Folder number:						
Article						
Designation 1:	PEM Fasteners F 10	- Inch	Release:	In Progress		
Designation 2:			Part type:	Part		
Standard:			Drawing/Manuf.:			
Article info					)	
Material:	Steel, Carbon		Order quantity:	Piece		
Weight:	0 Ger	neral informatio	n on Article.			
Dimensions :			Order note:			
Comment:						Ŧ



#### Please note:

Standard part recognition is only guaranteed if the document/article link exists, but will not work for a purely document-based working method. When taking over assemblies with the **New in HELIOS** function, standard parts that were not inserted via the Inventor Content Center and whose Family and Member ID can therefore not be transferred to the HELiOS article master are marked with a *symbol*.

🍫 👿 St	tandard 🔹 📲 👫 🗊	j 🕛 i	1	– Input r	nasks ———		
Create		Qty.	Article number	Article	Document		
	ampfmaschine kpl   SN-025737	1	SN-025737				
	Holzgrundplatte   SN-025738	1	SN-025738	Arti	cle number:	SN-025834	
	Grundplatte   SN-025739	1	SN-025739	Pro	ject number:	Project-independent 🛄 🔋	
• 🔅 🗋	Hauptständer kpl   SN-025740	1	SN-025740	Fold	ler number:	Folder-independent 🛄 📁	
•	Zylinder kpl   SN-025744	1	SN-025744				
E 🔅 🗋	Kolben kpl   SN-025756	1	SN-025756	Articl	e ———		
	Pleuel 1   SN-025762	1	SN-025762	Des	ignation 1:	PEM-Verbindungsteile F10 - Zc 💌	Relea
• 🔅 🗋	Lagerbock   SN-025763	2	SN-025763		-		
🗉 🎲 📄	Kurbelwelle kpl   SN-025766	1	SN-025766	Des	ignation 2:		Part 1
🔳 🎲 📄	Steuerschieber kpl   SN-025773	1	SN-025773	Star	ndard:		Draw
🗉 🎲 📄	Exzenterstange kpl   SN-025779	1	SN-025779				
	📠 PEM-Verbindungsteile F10 - Zoll F10-440-	1 ZI:1 4	SN-025834	Articl	e info		
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				Wei	ght:	[kg]	Reso
				Dim	ensions :		Orde
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Number of re	rords: 12. Number of selected records: 4	-	_				Orde
Number of re	cords: 12 Number of selected records: 4		_				Orde
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- General s				Cor	nment:		Orde
- <b>General s</b> Number assig	ettings —	e model		Cor	nment:		Orde
- General s Number assig Standard	ettings			Cor	nment:		Orde
- General so Number assig Standard When sele	ettings	del structure		Cor	nment:		Orde
- General so Number assig Standard When sele When des	ettings	del structure		Cor	nment:		Orde
General se Number assig     Standard     When sele     When des     When des     Hide multi	ettings ment according to: d Uppermost model (Top) Superordinat setting a model also select all occurrences in the mo selecting a model, deselect all occurrences in model ple occurrences on one hierarchy level	del structure		Cor	nment:		Orde
General se Number assig     Standard     When sele     When des     When des     Hide multi	ettings	del structure		Cor	nment:		Orde
General so     Number assig     Standard     When sele     When des     Hide multi     Allow pure	ettings mment according to: d O Uppermost model (Top) O Superordinat acting a model also select all occurrences in the mo selecting a model, deselect all occurrences in model ple occurrences on one hierarchy level a document selection	del structure		Cor	nment:		Orde
General se Number assig     Standard     When sele     When des     When des     Hide multi	ettings mmerk according to: d Uppermost model (Top) Superordinat setting a model also select all occurrences in the mo selecting a model, deselect all occurrences in model gle occurrences on on herarchy level a document selection ing	del structure		Cor	nment:		Orde
General s     Number assig     Standard     When sek     When des     When des     Hide multi     Allow pure	ettings mmerk according to: d Uppermost model (Top) Superordinat setting a model also select all occurrences in the mo selecting a model, deselect all occurrences in model gle occurrences on on herarchy level a document selection ing	del structure		Cor	nment:		Orde

## Major Release 2019 (V 2400)

#### Performance

A performance increase of about 8% could be achieved for model structure build-up in Inventor with HELiOS 2019.

## Attribute mapping

As of HELiOS 2019 the mapping of attributes between Inventor and HELiOS can be performed, in both directions, via new dialogues in the user interface.

yp: Mod	el property 💌 📢			File: Standard	
Processed	Property/Value	Attribute	Condition	Converter	Туре
	FileNameExt, mit 2 Fallunterscheidungen	Teiletyp (COMPONENT_TYPE, Artikel)			Dateieigenschaft mit Fallunterscheidungen
	Material	Werkstoff (WERKSTOFF, Artikel)		DefaultStringConverter	Modelleigenschaft
	Mass	Gewicht (GEWICHT, Artikel)		DivideBy1000FloatConverter	Modelleigenschaft
	Volume	Volumen (VOLUMEN, Artikel)		MultiplyBy1000FloatConverter	Modelleigenschaft
	Description	Benennung (BENENNUNG, Artikel)		DefaultStringConverter	Modelleigenschaft
	Stck (de), Piece (en)	Mengeneinheit (COMPONENT_QUANTITY_UNIT, Artikel)			Fester Wert
	FileNameExt, mit 6 Fallunterscheidungen	Dokumenttyp (DOCUMENT_TYPE, Dokument)			Dateieigenschaft mit Fallunterscheidunger
	FileNameExt, mit 5 Fallunterscheidungen	Benennung (BENENNUNG, Dokument)			Dateieigenschaft mit Fallunterscheidunge

### Identification options for substitution geometries

For use cases where multiple geometries are linked to the same article master - e.g. one exact model and several simplified models - you can indicate the document that is relevant for a synchronization of the article master attributes or the product structure. For all other document no synchronization must be performed.

In such situations you can work with the document attribute **Substitution document (HEL\_SUBSTITUTION\_DOCUMENT**).

HELiOS Attribute Management: Document

Designation	Name	Data type	Length	Object
Substitution document	HEL_SUBSTITUTION_DOCUMENT	BOOL		Document (Index)

When you use it, all documents except for one will be marked. The product structure synchronization will then be performed out of a substitution document, which prevents an accidental overwriting of attributes or product structures when there is an article that is linked to several CAD documents.

## Support of adaptive geometries

HELiOS 2019 supports so-called adaptive geometries in Inventor.

Adaptive geometries and parts consist of underdefined components for possible later design changes, e.g. in cases where you expect a part or a sub-assembly of a still unknown size to be inserted in a still incomplete assembly, or where the position and size of an element depends on the position and size of a different element in a part or assembly.

These adaptive elements are marked accordingly in Inventor and will be recognized by HELiOS, to ensure that their marking will still be preserved after their transfer to the HELiOS database.

Metal Containe	er.ia	m	
Relationships			
E Representatio	ns		
Crigin Origin			
ebox:1			
	-	<u>R</u> epeat Open	
	2	Edit	
	6	<u>O</u> pen	
😏 🔂 elid: 1	ß	Сору	Ctrl+C
		<u>D</u> elete	
		Add to New Folder	
		Selection	•
		Isolate	
	B	Undo Isolate	
		Su <u>b</u> stitute	
	ъ	Free Move	V
	°D	Free Rotate	G
		Representation	
		Component	•
	æ,	Show Relationships	
		Measure	Μ
		<u>C</u> reate Note	
		BOM Structure	•
	~	<u>V</u> isibility	Alt+V
		i <u>M</u> ate Glyph Visibility	
		<u>G</u> rounded	
	~	<u>A</u> daptive	

#### Batch update and Batch reimport

In the **Data**function group of the HELiOS Ribbon tab you can now find the new functions **Batch update** and **Batch reimport**.

Extras	Vault	Autodesk A360	HELiOS	<b>6</b> •
<b>A</b>				
	import dels)	Batch import (Drawings)	Batch updat	e Batch reimport
		Data		

Use the **Batch update** function to update multiple HELiOS documents (batches) in one step via the Combined search mask.

The documents will be loaded, set to "In progress", updated and checked in one by one (they will not be automatically removed from the workspace).

In this way you can update

- older documents to a current CAD version CAD version e.g. Inventor 2016 -> Inventor 2018),
- due to changed HELiOS configurations (e.g. if a user has modified the attribute assignments and older files have not be changed accordingly yet),
- due to changed CAD configurations,
- of document previews,
- after taking over of data, if this data have not been saved by the CAD interface (i.e. a subsequent taking over of
  preview images, model and product structures, attribute assignments etc. takes place),

and, in doing so, avoid time consuming, manual opening and saving of the affected documents.



With the **Batch reimport** you can update existing HELiOS documents via a renewed import of the corresponding files from a file system, e.g. if a change of HELiOS documents through external tools (e.g. update to newer CAD versions) should be followed by a subsequent update of the documents in HELiOS, or the import of subsequent corrections of original files is to take place when transferring data.

This takes place via a selection dialogue works in the same way as the one for the **Batch import** function.

An **Automatic check-in** of the documents into the HELiOS database will be carried out if you activate the corresponding checkbox at the top of the dialogue window.

🖳 Import		×
😽 🚰 📈 III Automatic check-in		
File name	File extension	
D:\Inventor_Konstruktionen\Inventor2018\ThirdPartyReferences\Assembly2.iam	.iam	
D:\Inventor_Konstruktionen\Inventor2018\ThirdPartyReferences\Part1.ipt	.ipt	
D:\Inventor_Konstruktionen\Inventor2018\ThirdPartyReferences\Root.iam	.iam	
OK	Cancel	

For both functions the update procedure will be recorded in a log file that can be viewed subsequently.

indicates

Indication of locally changed files in Workspace

In the HELiOS Workspace you can find the new **Changed**, local column, where a computer symbol that a document has been changed and saved locally since the last synchronization with HELiOS.

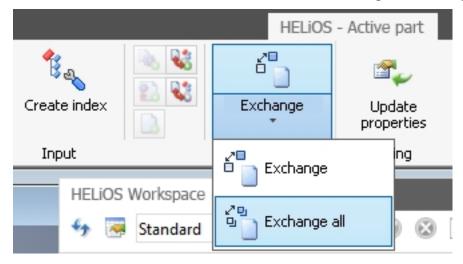
Loaded	Changed, local	Document number	Article number	Designation	Release status
		DN-001375	SN-026699		Status: In Prog
		DN-001376	SN-026700		Status: In Proc
		DN-001377	SN-026701		Status: In Proc
		BDN-001400			Status: In Proc
		DN-001401	SN-026723	Holzgrundplatte	Status: In Proc
		DN-001402	SN-026724	Grundplatte	Status: In Proc
	1	BDN-001403	SN-026725	Hauptständer kpl	Status: In Proc
		DN-001404	SN-026726	Kreuzkopfführung	Status: In Prog
		DN-001405	SN-026727	Ständerrippe	Status: In Proc
		DN-001406	SN-026728	Ständerfußplatte	Status: In Prog
<b>v</b> 😑	i 💭	<b>B</b> DN-001407	SN-026729	Zylinder kpl	Status: In Prog
		DN-001494	SN-026816	Platte	🐼 Status: In Prog
		DN-001495	SN-026817	Stift	OStatus: In Prog
		DN-001496	SN-026818		OStatus: In Prog
		🔄 DN-001497			OStatus: In Prog
		<b>B</b> DN-000210	SN-025665		😔 Status: In Prog
					6
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	corus; 20				,
raphic -					(

In the **HELIOS Options** dialogue window you can determine whether existing, locally changed documents are to be removed from the Workspace or not when Inventor is closed.

3 HELIOS Options	_	×
– Settings for the Workspace		
Local directory of documents:		
C:\Users\Administrator\AppData\Local\ISD Software und Systeme\SESSION732heliosai3\rot_0		
Remove documents that are currently not being edited from Workspace after closing the application           Remove locally changed files		

#### Exchange active part

In the HELiOS Ribbon tab for the active part you can find the new functions Exchange and Exchange, all.



These enable you to exchange components in your model drawing via the Combined search in HELiOS.

**Exchange** replaces one selected component in your drawing with a different one (e.g. a newer version) from the HELiOS database.

**Exchange all** replaces all occurrences of the part in the drawing with the one that was selected via the Combined search.

×۵

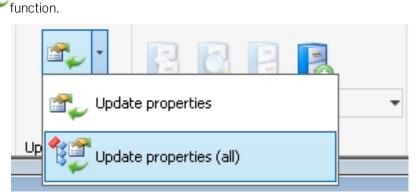
In the **HELiOS** - **Part** Ribbon tab you can find the **Exchange dependent component** function in the **Input** function group. If an active part is a dependent component, it can be exchanged with this function, taking the dependency into account.

Furthermore, you can use these functions for exchanging of base parts of derived parts or assemblies.

### Update properties (all)

The Update function group of the HELiOS and the HELiOS - Active partRibbon tab now offers the new Update

properties (all)



This function updates the properties of the model as well as the displayed names of all direct sub-parts.

### Select/deselect drawings and presentations

When transferring the CAD model structure to the HELiOS Datenbase with the New in HELiOS function, and also when deriving model structures, you can find the new option **When selecting/deselecting a model, automatically select/deselect drawings and presentations** in the dialogue window.

– General settings ————————————————————————————————————
Number assignment according to:
Standard O Uppermost model (Top) O Superordinate model
When selecting a referenced model also select superordinate model
✓ When selecting a model also select all occurrences in the model structure
When deselecting a model, deselect all occurrences in model structure
☑ When selecting/deselecting a model, automatically select/deselect drawings and presentations
Allow pure document selection

This option allows you to determine with one mouse click whether drawings and/or presentations which are linked to a model are to be selected or deselected together with the model. Default: Checkbox active.

#### **Expanded HELiOS Options**

In the HELiOS Options dialogue window you can influence the loading behaviour (updating of attributes) of components which have already been opened in the context of other documents. If never versions of components of a document exist on the Server (this concerns both (file) changes of the corresponding components and the indexing by HELiOS), these can be updated to the new state when opening them in their local CAD environment or choosing **Data > Apply server state**.

Since an automatic check on updatings upon opening of sub-assemblies from an already opened assemblies can be very time consuming, and since you might still prefer continuing your work with the state that applied to the superordinate assembly when it was opened, you can use the **Update components** option, with which the automatic updating can be activated or deactivated.

An additional query for confirmation of the update can be activated or deactivated.

The updating takes place from top to bottom, i.e. sub-components with a newer index will even be updated (with or without query) even if the superordinate document was replaced with a newer server state.

Also, the dialogue provides new options for the definition of the update behaviour of assemblies when there are newer indices from sub-components.

These options allow you to decide in which cases an update to newer indices is to be carried out, and whether an update to the newest or the newest released index is to be performed.

The update option takes effect upon loading and when choosing Apply server state.

K HELIOS Options	-		×
- Settings for the Workspace			
Local directory of documents:			
C:\Users\Administrator\AppData\Local\ISD Software und Systeme\SESSION732heliosai3\rot	t_0		
Remove documents that are currently not being edited from Workspace after closing the applicat     Remove locally changed files	ion.		
- Settings for the Document			
Behaviour when opening:			
✓ Set to edited mode			
Update components			
V Query before updating			
Do not update document again if it has already been loaded			
Behaviour when closing:			
Automatic check-in for documents in edited mode			
Update models to newer indices:			
Never			
O Always			
○ Not in released context			
Behaviour when updating models to newer indices:			
Update to newest index			
Update to newest released index			
– Attribute assignment —			
Settings for: Transfer to HELIOS Export from HELIOS	Further		
(	ОК	Car	ncel

## Linked drawings

HELiOS 2019 comes with improved behaviour of linked documents and drawings.

For instance, if a linked document cannot be clearly assigned to an opened drawing, a selection dialogue will be displayed.



Support of bolt and stud connections

Bolt and stud connections can now be managed with HELiOS.

The standard parts are made available in the HELiOS Workspace and will be exchanged in bolted connections upon saving or initial takeover via the **New in HELiOS** function.

A subsequent change of the connections is also possible.

# **HELIOS for SOLIDWORKS**

# Note: SOLIDWORKS interface only available as of HELiOS 2020 (Version 2500)

Due to a fundamental revision of the SOLIDWORKS interface with regard to functionality and performance, as well as a complete standardization of all HELiOS masks, an update of the SOLIDWORKS interface will not be available until HELiOS 2020 (Version 2500).

# **Navisworks Interface**

Service Pack 2 (V 2402)

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## Model structure: Display of product structure

If only a document structure instead of a model structure is available for a document, the HELiOS-Navisworks interface displays the document structure, according to the document master data, on the **Model structure** tab.

General     Assignments     Input     Output       Image: Constraint of the second
Edit Preselect Open Edit Roles Attribute Notes Mark-up master data + Edit • Workflow status values document • • General
Mask × Model structure × Extended mask × Graphic × Targets
Standard ▼ 📲 📲
Document O O In In W Designation
🖃 DN-002744 🛛 🛜 🄛 a 📀 total.dwg
□ DN-002745 b + Q 2 circles.dwg
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DN-002747 🔤 🍉 b 🔆 📀 rectangle.dwg
🖃 DN-002748 🛛 🔤 🗁 b 🌟 😍 circle and rectangle.dwg
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# Service Pack 1 2019 (V 2401)

Support of von Navisworks 2020

HELiOS 2019 Service Pack 1 offers an interface to Navisworks Version 2020.

# **HELIOS & EPLAN**

Service Pack 1 2019 (V 2401)

Support of EPLAN 2.8 HELiOS 2019 SP1 supports the current EPLAN Version 2.8.

# **Internet Server**

Major Release (V 2400)

New HELiOS Internet Server

As of HELiOS Version 2401 (Service Pack 01) a new **HELiOS Internet Server** will be available, replacing the old version.

The new HELiOS 2019 Major Release will still come with the HIS that you already know.

If you want to use the new **HELIOS Internet Server** now, or still work with the old one and just want to test the new one, we will happy to assist you with the installation.

For the update to the new HIS you will need help from ISD Consulting, since an automatic migration of your specific adjustments from the old to the new HIS will not be possible.

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