

HELiOS - What's new?

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Notes on HELiOS Updates

Major Release 2020 (V 2500)

Important Notes on Updates for Administrators

For updates to HELiOS 2020 (Version 2500 or higher) a central update of the supplied HELiOS database is required.

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

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.

Log file for 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.

New mask format

Please read all notes with regard to the new mask format in HELiOS 2020!

MultiCAD interfaces

If you are working with an Inventor or SOLIDWORKS interface and HELiOS, please note that before installing an update of an older version to HELiOS 2020 (Version 2500) or higher, some adjustments may have to be made before the update.

In this case, please contact the Consulting department of the ISD Group.

HELiOS Desktop

Service Pack 2 2020 (V 2502)

Enhanced Mask Editor

The new Mask Editor introduced with HELiOS 2020 has been further revised and enhanced with new features.

The **Transfer formatting** function allows you to transfer the formatting of a specific element to a selection of other mask elements.

The also new **Exchange** function can be used to change the attribute stored in a data field via a selection dialogue.

Mask Editor			 	×
✓ Cut ♥ Undo ≧ Copy ♥ Redo □ Paste	abl Aa 🛛 🎝 🖻 👻 X Data field field	Kemove 문 릐 ··· 후 ··· 후 / j Exchange ··· 응 후 ··· / ··· 후 ··· /	$\begin{array}{c ccccccccccccccccccccccccccccccccccc$	
Clipboard History		Edit Orientation Adjust size		
Show document* ×			Properties Group field	•
			- Item	
Document number:	Document number	Sheet: She	- Colours	۲
Project number:			Text colour: Background colour:	
Folder number:	🎾		- Formatting	
Designation:	Designation •	Release: Workflow status ▼ Document type: Document type ▼	Microsoft Sans Serif ▼ 12 ▼ B I U Ŧ	
	Date: Name:		- Element-specific	۲
Created:	Creation date Created by	Scale: Scale	Heading: Text	
Checked:	Checked on Checked by	Format: Format		
_ Index		C		
Index creator:	Index creator	File name: File name		
Index date:	Index date	Origin: Drawing origin		
Index text:	Index text	Based on: Based on		

The range of functions for opening, closing and saving mask files has also been extended, including a display of last used files.



If new **user-defined object types** have been created in the **Attribute Editor**, you will be asked to create new mask files for them after calling or restarting the Mask Editor. Confirm the query with **YES** to execute the automatic process.

Create mask files

The following masks could not be found. Do you want to create them now?

Helios.Masks.UTO.Person.Creation.xml
Helios.Masks.UTO.Person.Modify.xml
Helios.Masks.UTO.Person.Detail.xml
Helios.Masks.UTO.Person.Search.xml

NO	YES
----	-----

Intelligent "Delete" behaviour of objects

If HELiOS objects (Articles, Documents, Projects, Folders, ...) cannot be deleted - e.g. because the user does not have the right to delete them, or the corresponding edited objects are reserved for export, or are built into the product structure and/or model structure - then these objects are displayed in a corresponding result list after the deletion process, which shows the reason why the deletion process cannot be carried out for each object.

🖘 ອ Standard	•									
Error	Article number	In	In	W	Designation	Part type	Werkstoff	Standard designation	Creation dat	Created by
Jsed in model structure	SN-028058			Ð	Fork-Crown	Individual part			21.08.2020	Designer1
Jsed in model structure	SN-028059			Ð	Head Tube	Individual part			21.08.2020	Designer1
Jsed in model structure	SN-028060			Ð	Fork-Brace	Individual part			21.08.2020	Designer1
Used in model structure	SN-028061			Ð	Dial-Elastomer	Assembly			21.08.2020	Designer1
Jsed in product structure	SN-028062			0	Dial-Cover	Individual part			21.08.2020	Designer1
Jsed in product structure	SN-028063			Ð	Elastomer	Individual part			21.08.2020	Designer1
Used in product structure	SN-028064			Ð	Dial-cap	Individual part			21.08.2020	Designer1
Jsed in product structure	SN-028065			Ð	Dial-Base	Individual part			21.08.2020	Designer1
Jsed in product structure	SN-028066			Ð	Dial	Individual part			21.08.2020	Designer1
Used in product structure	SN-028067			Ð	Spacer	Individual part			21.08.2020	Designer1
Jsed in model structure	SN-028068			Ð	Fork-Slider	Individual part			21.08.2020	Designer1
Jsed in model structure	SN-028069			Ð	Fork-Piston	Individual part			21.08.2020	Designer1
Used in model structure	SN-028070			Ð	UNI 5933 - M4 x 12	Individual part			21.08.2020	Designer1
Used in model structure	SN-028071			Ð	NF E 25-125 - M3 x 10	Individual part			21.08.2020	Designer1
Jsed in model structure	SN-028072			Ð	Fork-Tube	Individual part			21.08.2020	Designer1
Jsed in model structure	SN-028073			Ð	Fork-Damper	Individual part			21.08.2020	Designer1
Jsed in model structure	SN-028074			Ð	Fork-Slider_MIR	Individual part			21.08.2020	Designer1
Jsed in model structure	SN-028075			Ð	Fork-Piston_MIR	Individual part			21.08.2020	Designer1
Jsed in model structure	SN-028076			Ð	Fork-Tube_MIR	Individual part			21.08.2020	Designer1
Jsed in model structure	SN-028077			Ð	Fork-Damper_MIR	Individual part			21.08.2020	Designer1

The deletion processes are executed in an optimal sequence, i.e. taking into account any existing references in the model or product structure.

Please note:

Under **Error**, only the first error that HELiOS encountered during the deletion process is displayed. That is, there may be other reasons why the object cannot be deleted immediately after the error has been corrected.

Furthermore, even if the Workspace is closed, you will be informed if objects to be deleted are currently in the Workspace.

	Info
At least one document DN-002944, DN-002945, DN-002950, DN-002956, DN-002958, DN-002939, delete these documents?	(DN-002938, DN-002940, DN-002941, DN-002942, DN-002943, DN-002946, DN-002947, DN-002948, DN-002949, DN-002955, DN-002951, DN-002952, DN-002953, DN-002957, DN-002954, DN-002937) is being used in a Workspace. Do you really want to
	NO YES

Settings for the Workspace

On the General tab of the HELiOS Options you can now find the new Settings for the Workspace area.

As with the known setting options in the area of MultiCAD interfaces you can also change the local session directory for the Workspace of the HELiOS Desktop, if desired.

You can also specify whether documents that are not currently being edited, or whether locally changed documents are to be removed from the work area when the program is closed.

HELiOS Options		×
General Input	General Settings	
Display Result lists Project and Folder structures Print Import/Export	- Projects Start project: Project-independent Last active project	🔋
Workflow Log Database	- Folders Start folder: Folder-independent	🎾
Help	C Last active folder - Multi-language attributes - Settings for the Workspace	
	Local directory of documents: C:\Users\mkraus\AppData\Local\ISD Software und Systeme\HELiOS Workspace\000002_{83cc5047-de1a-4e48-b684-908fc56f7b19} Remove documents that are currently not being edited from Workspace after closing the application Remove locally changed files	
	ОК	Cancel

Marking "empty" archive documents when loading, viewing and exporting

When sending print or conversion jobs via KST, which subsequently update an existing document master in HELiOS, the corresponding document in HELiOS can be marked as "obsolete".

A common example of this is the updating of neutral formats via the spooler. Another example is customer-specific adaptations that automatically generate archive documents upon release. Here it can happen that these archive documents are displayed as "empty" due to errors, outdated document statuses or a release or conversion by the HELiOS Spooler still running in the system.

Such documents are appropriately indicated when the HELiOS document master data function is called:



Also when exporting such documents, as well as when calling actions such as **Create notes document**, **Create mark-up** or **Open with (...)** you will receive a corresponding warning message:

Select document						-			×
The following documents are no exported.) longer up to date and are currentl	y being upda	ated	by	the :	5pooler. If you continue, t	ney will	still be	
🖘 褼 Standard	-								
O O Document number	Document ID (Head)	Revision	In	In	Re	Designation	Origir	hal path	
🔄 😂 🗞DN-003028	B006QHDM5N7EXO00003KE7	1	а		0	3D-Model			

After the document is updated by the Spooler, the corresponding identifier will be removed again.

Major Release 2020 (V 2500)

New mask format and central mask configuration

In HELiOS 2020, the previous mask format has been changed from .msk to .xml, in addition to the revision of the **Mask Editor**.

In addition, mask files are now managed outside the installation directory, resulting in some changes in the system architecture that administrators should urgently consider:

The masks of older versions that were previously stored in the \sys\ directory of the installation are automatically converted to the new XML format by an update installation of an older HELiOS version to HELiOS 2020 (V 2500) or higher and stored at **%Programdata%**.

At %**Programdata%**, the masks are stored in a version-specific path, i.e. for HELiOS 2020 this path could look like this: "C:\ProgramData\ISD Software und Systeme\HELiOS 2020\GUI\Masks". In a later version, the version identifier in the path will be correspondingly higher.

C:\ProgramData\ISD Software und Systeme\HELiOS 2	020\GUI\Masks	
Name	Date modified	Туре
i email	15.01.2020 03:09	XML Document
Helios.Masks.Article.Creation	15.01.2020 03:09	XML Document
📄 Helios.Masks.Article.Detail	15.01.2020 03:09	XML Document
Helios.Masks.Article.Index	15.01.2020 03:09	XML Document
Helios.Masks.Article.Modify	15.01.2020 03:09	XML Document
Helios.Masks.Article.Search	15.01.2020 03:09	XML Document
Helios.Masks.ArticleClass	15.01.2020 03:09	XML Document
Helios.Masks.ArticleClass_anl	16.11.2019 03:09	XML Document
Helios.Masks.Document.Creation	15.01.2020 03:09	XML Document
📄 Helios.Masks.Document.Detail	15.01.2020 03:09	XML Document
📄 Helios.Masks.Document.DetailEx	15.01.2020 03:09	XML Document
Helios.Masks.Document.Index	15.01.2020 03:09	XML Document
📄 Helios.Masks.Document.Modify	15.01.2020 03:09	XML Document
Helios.Masks.Document.Search	15.01.2020 03:09	XML Document
Helios Masks DocumentClass	15 01 2020 03:09	XMI Document

This conversion or directory is not dependent on whether the local or central directory was selected for the interface configuration (see below).

The old configuration file can then be found in a **Backup** directory that was created below the installation folder.



The new masks at **%Programdata%** should not be overwritten in any case, because these are the "delivery status", which may be updated by later update installations. If masks are edited and changed with the mask editor, they are stored at **%Appdata%** and are called up by HELiOS when working in corresponding masks from this directory.

This means: If masks are to be distributed uniformly to different workstations, they must be saved under % Appdata% and not (!) under % Programdata%.

The optional query for UI configuration during a new, update or change installation has also been extended to distinguish between a local and a central directory (across computers). This means that you can also store the interface configuration for several work centers in a central directory instead of having to "distribute" it to the individual local directories.

HELIOS HELIOS Interfaces	Jeneral			
System data source	HeliosBauteil			
User	hicad			
Password	••••			
✓ Use Vault Server	Address localhost	Port	9000	
SmartSearch-Server	Activate			
	Configuration			
Use Spooler	Server			
Use Application Server	Address	Port		
Saving of configuration files	Use local (computer-specific) directory Use central directory for configuration data			
Configuration file				

If you select the option **Use central directory for configuration data** in the new or update installation, you must select a **Directory**, e.g. network drive, via Windows Explorer instead of the local**Configuration file** in .zip format after clicking on the symbol in the selection dialogue.

Saving of configuration files	 Use local (computer-specific) directory 	
	Use central directory for configuration data)
Directory		

🗼 Ple

Please also note the following:

• A Change installation of HELiOS or HiCAD with HELIOS offers the possibility to change to a central configuration directory later. However, the subsequent selection of a local configuration file is not provided at this point. If you want to change the local configuration afterwards, you should use the tool HELiOSConfigImport.exe.

😽 HiCAD 2020 EN Setup		—		×
Change Installation HiCAD 2020 EN Settings		Ŀ	5·0 /	9
Use Spooler Server	-			
Use Application Server Server	Port			
Use Vault Server Server	Port	900	0	
Activate ISD Update Service				
Directory C:\ProgramData\ISD Software u	ind Systeme\H	HELIOS 20	020 SF	
Back	Nex	t	Can	cel

- Settings files that are provided by the administrator in a central directory must be selectively copied to this directory. Due to the dependency on files, the directory structure provided by HELiOS must be observed. This must correspond to the structure under **%APPDATA%\ISD Software und Systeme\HELiOS 2020**. If you have any further questions, please contact the Consulting department of the ISD Group.
- If the set configuration directory is not accessible at runtime, HELiOS behaves as if the directory is empty. This means that the program starts without updating the UI configuration.
- When updating HELiOS for an older HiCAD version, the option to set the configuration directory is missing. This
 can only be adjusted via the registry. If you have any further questions, please contact the Consulting department of the ISD Group.

If problems occur during the conversion to the new mask format in the course of an update installation, the mask converter **MskToXmlUpdate** can be used.

New Mask Editor

With HELiOS 2020 (version 2500) you will find a new **Mask Editor** on the **Admin Tools** tab of the HELiOS Desktop, which has been adapted to the latest state of the art with a modern Look & Feel and thus offers some innovations and advantages compared to the previous version.

In addition to a modern Ribbon design, which also supports operation at high resolutions, this has laid the foundation for further expansion of the masks and the Editor in 2020.

The revision of the Mask Editor has also led to a conversion of the mask format to XML. Mask files are now managed outside the installation directory.

lask Editor						
■日口つで						
Start						\bigcirc
ut Dundo opy CRedo isert Route	ata ield field Insert control	Element Remot	nts H TO	Image: state of the state o	21, 21, Display Generate	
how document $ imes$					₽ Properties	
					Mask	
Document number:	Document number		Sheet:	She I.C.I A	- File	
Project number: FOLDER NUMBER:		🔋	Index:	Inde	Name Helios.Masks.Document.DetailEx.xml	
Document	Designation	•	Release:	Release status	User-defined title Object type Document	
	Date:	Name:	Document typ	e: Document type 🔹	Einsatzzweck Display	
Created:	Creation date	User	Scale:	Scale	Martheire	
Checked:	Checked on	Checked by	Format:	Format	Width Height 622 375	
Index						
Index creator:	Index creator		File name:	File name	- Colours	
Index date:	Index date		Origin:	Drawing origin	Mask colour: Default colour of te	exts:
In stars da set	Index text		Based on:	Replacement for		

Start search with F3

To avoid having to switch between keyboard (entering the search criteria) and mouse (initiating the search) when searching for a specific object in the HELiOS Database (Document, Article, Project, Folder, ...), you can also use the F3 key to perform the search.

You must therefore click on **Find** with the mouse in the corresponding, active search mask, but you can also execute the search using the keyboard with F3 for manually entered criteria.

ReleaseNext: Distinguishing between all objects and Admin objects

In the Admin tool **ReleaseNext** for unlocking HELiOS objects that are being edited by other instances, you can now distinguish between two options:

- Show all locked objects: In the corresponding object tab (Articles, Documents, Projects or Folders), all entries that were locked in HELiOS are listed (user-independent).
- Show only my locked objects: Only the objects that were locked by the logged on Administrator are listed.

Unlocking of HELiOS objects	- 🗆 X										
\bigcirc Show all locked objects $\textcircled{oldsymbol{e}}$ Show only my locked objects) Show all locked objects Show only my locked objects										
Article × Documents × Folders ×											
🖘 🗟 🙀 Standard 🗸											
Article number Index Designation Unlock selected objects	Host compute Locked on										
TN-00001 Valve	DEDTM066										
Number of records: 1	Unlock all objects Close										

HELiOS Spooler

Service Pack 2 2020 (V 2502)

Print Client: Bundling of jobs by document number

The option to bundle jobs in the **PrintPlot** menu part of the **HELiOS Print Client** has been extended:

In addition to the default setting where print jobs are not processed in bundles (**Bundle: Off**), you can now choose between **Bundle: All jobs** and **Bundle: By document no**.

If the **Bundle: By document no.** option is active, documents (e.g. SZA files with several sheet areas each) can be converted into separate PDF documents, where a PDF document contains a separate sheet for each HELiOS sheet area.

HELiOSPrintClient					– 🗆 🗙
😻 PrintPlot 📄 Log					
	Document			Output-da	ate-time
Document number	Туре	Format	Status	Immediate	28.08 - 14:28:55
				C Options	14:22:23
				Friday , 28 Augu	ıst 2020
				Bill of Materi	ials (BOM)
				Bindrinden	Quantity List
✓ Remove jobs after sendir	ng Bundle:	OFF	•		
		OFF		Banr	ner
	32 3	All job	is	🔽 Output banner	
- 19 (19 - 10 - 10 - 10 - 10 - 10 - 10 - 10 -		10	1	Host name : DEDTM066	M
	Output device			User: mkraus	
Assign printer automatic	ally			Job name :	
Receiver : DEFAU	LT		<u></u>		Date 🔽
C Use default printer				TENT TENT TENT	Time 🗖
\\DED'	FMS16.intl.isdgroup.com\DI	EDTM-MFI	P01 (PCL 6)	Insertion point	abc
C Options					I ransparent M
Printer name :			-	TEXT TEXT	Receiver 🗖
Paper size :		-			
Paper tray :			-	Priority	Margins [cm]
· · · ·				1	Left: 0.00
ISD F	ilePrinter PS (Postprocessin	g)		1 (min) - 99 (max)	Bight: 0.00
Configuration: No pos	tprocessing		-		T
Orientation	Scale		Copies	Colour	
O Portrait	Auto 👻		-51		Bottom: U.UU
C Landscape	1:		123	Colour	🔽 Set to minimum
C Auto	Scale line widths	1	•	C B/W	Centred output
End					

HELiOS Options: Include model area

In the HELiOS Options for printing documents you find the new sub-menu item Include model area under Print all views.

This option is relevant if you work with a CAD system (such as HiCAD or AutoCAD) that makes a distinction between model and drawing area.

If the option is not activated, all sheet areas of the drawing are transferred when the print jobs are transferred to the Report Manager. If this option is activated, the model area is also transferred.

P HELiOS Options		
General Input Display	Settings for printing	
Result lists	Print documents Print immediately if input unambiguous	i.
Project and Folder structures Print	Views: View selection	
Import/Export Workflow	 Print all views Include model area Print the view that was active when savi 	ng the model drawing
Log Da+-'	Linked articles: Must be located in the same	ment to be printed
	Must be located in +-	-+ed

AutoCAD plot area definition

When printing files from AutoCAD, the user can also select the **plot area**.

Geiteneinrichtu	ng		Plotstiltabelle	(Stiftzuweisungen)
Name:	<keine></keine>	 ✓ Hinzufü 	igen	× #
Drucker/Plotte			Optionen des	schattierten Ansichtsfensters
Name:	聞 AutoCAD PDF (General Documentat	ion).pc3 < Eigensch	Schatt,-Plot	Wie angezeigt
Plotter:	DWG To PDF - PDF ePlot - by Autodesk		N - Qualität	Normal ~
Ausgabeort:	Datei			100
In Datei plo	tten PDF-	Optionen	Plotoptionen	rgrund plotten
apierformat		Kopienzahl	Mit Linier	nstärken plotten Insparenz
ISO A4 (210.	00 x 297.00 mm)	~ 1	▲ Mit Plots	tilen plotten
lotbereich		Plotmaßstab	✓ Papierbe	reich zuletzt plotten
Zu plotten:		Anpassen	Papierbe	reichobjekte ausblenden
Layout	~	Maßst.: 1:1		ierung ein
Anzeige Fenster Grenzen	s instellung auf druckbaren Bereich) –	1 mm		gen in Layout speichern
Layout	Plot zentrieren	1 Finh	eit OHochforr	nat
v. 0.00	mm		Querform	nat >
1: 0.00		Linienstärk, sk	aller. Auf dem	Kopfplotten

With Service Pack 2 (Version 2502) the configuration options of MultiCAD formats of the **HELiOS Spooler** have been extended in such a way that the AutoCAD plot area, which distinguishes between model and layout, can be taken into account accordingly when printing AutoCAD files.

Installation

When installing the HELiOS Spooler, please note that the database connection specification, which was optional in earlier versions or only required for certain interfaces, will be mandatory starting with HELiOS 2020 Service Pack 2 (Version 2502).

🖟 HELiOS Spooler Se	tup	×
Database connect Settings for connect	t ion tion with HELiOS DB	I·S·D 👀
System data source	bauteil_bim_2501	~
HELIOS User HELIOS Group	Administrator PDM Administrators	~
Use Vault Server		
Address ISDVault		Port 9000
	<u>B</u> ack N	ext Cancel

Service Pack 1 2020 (V 2501)

Extension of the installation

When working with MultiCAD interfaces please note the following extension to the installation: By setting up the database connection at this point, an even more stable operation of the HELiOS-MultiCAD coupling is guaranteed.

🙀 HELiOS Spooler Se	tup	×
Database connect Settings for connect	tion tion with HELiOS DB	
✓ Activate DB conne	ection	
System data source	HeliosBauteil	~
HELIOS User	Administrator	~
HELIOS Group	PDM Administrators	~
Use Vault Server		
Address		Port 9000
	<u>B</u> ack I	<u>N</u> ext Cancel

Major Release 2020 (V 2500)

Notes on Update installations/ New postprocessing

The Spooler will be extended in such a way that the following information for bundled PDF export will be available for postprocessing:

<MultiSheetCurIdx> (%HEL_MULTISHEETCURIDX%) - Current sheet index for multiple sheets within one job (if applicable, otherwise always 0).

<MultiSheetEndIdx> (%HEL_MULTISHEETENDIDX%) - Last sheet index for multiple sheets within one job (if applicable, otherwise always 0).

<MultiSheetOutputName> (%HEL_MULTISHEETOUTPUTNAME%) - Output file name without file extension; for multi-sheet printouts identical with <FileName>, but without attached sheet index.

In case of an update installation, you have to copy some system files to the right places, which will not be overwritten by it.

These are the files

- ISD FilePrinter? PS.BatchPDF.bat (executes the postprocessing)
- ISD FilePrinter? PS.BatchPDF.PostProcess (contains the calling of the postprocessing)

which you have to transfer from the installation directory of the Spooler (by default: C:\Program Files\ISD Software und Systeme\HELiOS Spooler\Defaults\FilePrintPostprocess\) to the target directory

C:\ProgramData\ISD Software und Systeme\HELiOS Spooler 2019 SP2\FilePrintPostprocess\.

A new installation of the HELiOS Spooler in Version 2500 (HELiOS 2002) is not affected by this.

"Change" option for MultiCAD settings

Not only can you configure the database and Vault Server connection for a CAD application (HiCAD, AutoCAD, Inventor, SOLIDWORKS) linked to HELiOS during a new or update installation of the HELiOS Spooler, but also via a **Change** installation.

HELIOS 2020 HELIOS Databa	c Uninstall Change	ISD Software und Systeme ISD Software und Systeme ISD Software und Systeme
🙀 Extended settings		– 🗆 X
HELIOS HELIOS Interfaces	General	
System data source	helios_2500	
User Password	hicad	
✓ Use Vault Server	Address localhost	Port 9000
L	OK Save Cance	1

HELiOS MS Office Interface

Service Pack 2 2020 (V 2502)

Add attachments to E-mails

ГÍ

When you write, forward or reply to an E-mail in Outlook, the HELIOS Ribbon of the E-mail window also provides the

Attach document function for attaching files via the HELiOS document search.



Please note:

If you are currently using Office 2010, the HELiOS interface will only work in separately opened E-mail windows, but not when the E-mail is docked in Outlook.

HELiOS options with automatic login

With the update to HELiOS 2020 Service Pack 2, an Options dialogue is available in the Office interface, as is already known from the HELiOS-MultiCAD interfaces.

In addition to settings for the Workspace and for the import of attribute mappings, you can activate the option **Auto**matic HELiOS login when starting the Office application under Settings for document to prevent the HELiOS login dialogue from preceding each start of an Office application.

3 HELiOS Options	-	-		\times
– Settings for the Workspace —				
Local directory of documents:				
C:\Users\administrator.INTL\AppData\Local\ISD Software und Systeme\HELiOS Workspace\000002_{2746de13-195	ie-4bdf-94a9-73	1969c	a8cca}	
Automatically end editing of documents without local changes after closing the application				
Remove documents that are currently not being edited from Workspace after closing the application				
Remove locally changed files				
– Settings for the Document –				
Automatic HELiOS login when starting the Office application				
- Attribute assignments				
Settings for: Transfer to HELiOS				
		_		
	OK		Can	cel

Service Pack 1 2020 (V 2501)

Transfer of forwarded E-mails as separate documents

When transferring forwarded E-mails to HELiOS, you can decide whether the forwarded E-mail should be transferred as a new HELiOS document (e.g. because the content has changed) or whether the original e-mail already stored in the HELiOS database is sufficient and the transfer of the forwarded E-mail is therefore not necessary.

HELiOS CAD/CAE Integrations

Service Pack 2020 2 (V 2502)

Workspace

The behaviour of the **HELIOS Workspace**, which is available in HELIOS Desktop and coupled applications like Office, Autocad, Inventor, Navisworks und SOLIDWORKS, has been revised and extended.

The new **Show only documents of the current application** filter only allows you to switch between a view of all open HELiOS documents across all applications and the open HELiOS documents of the current application.

≫					HELIC	05 Workspace			
4	🕨 🐼 Sta	andard		•	7 🧏 / 🖉 😂 🖂				
	Opened	Change	Open, w	Open +	Document number with icon	Article number	Designation	Designation	W
10		1	2		2000206	SN-025737	Production drawing		0
10	~		2		ON-000207	SN-025738	3-D model		0
10			2	- -	ON-000208	SN-025739	3-D model		0
1				📆 Filter	workspace		_		×
1				Show of	only opened documents (indirec	tly loaded docume	nts will not be shown)		
1				Show of	only documents of the current a	pplication			
1			-						
1		1	-						
1			-						
1						5	Analy Domain		
1			-			L.	Apply Kemove	Cancel	
1			-		%DN-000222	SN-025750	3D-Modell		O
1			2	E9	GDN-000223	SN-025751	3D-Modell		O

The latter makes sense with regard to the clarity of the data, the former may make sense if you want to open a DXF file from Inventor in Autocad or if you want to insert an Excel file with parameters for assemblies in your designs as a 3rd party reference. In such cases you can also work with the HELiOS Workspace.

In the **HELiOS Options** of your Multi-CAD application(s), the checkbox **Remove documents that are currently not being edited from Workspace after closing the application** is set to close the sessions of all documents that are not being edited.

With the underlying option **Remove locally changed files** you can also specify whether locally changed documents should be removed from the workspace after closing the application or not.

Remove documents that are currently not being edited from Workspace after closing the application
Remove locally changed files

Behaviour when opening: Supplement non-existing article context by (unambiguously) linked article

In the configuration dialogue of the **HELiOS Options** of your HELiOS with Autodesk Inventor or SOLIDWORKS, you will find the option **Supplement non-existing article context by (unambiguously) linked article**.

When loading model structures in which nothing is entered, HELiOS orients itself on the assignment to the default article in case of ambiguous article assignments.

The option is currently always active, cannot be switched off at this time, and will be extended by additional features in the future.

Behaviour when opening:

- Set to edited mode
- Update components
 - Query before updating
- Do not update document again if it has already been loaded
- ✓ Supplement non-existing article context by (unambiguously) linked article

Behaviour when transferring to HELiOS

In the HELIOS Options window of your MultiCAD interface /en, under the heading Behaviour when transferring to HELIOS, you will also find the new checkbox Check whether the document needs to be saved first.

If this checkbox is set to active (default), HELiOS checks when calling **New in HELiOS** or functions based on it, such as **Batch import**, whether the corresponding documents have to be saved first before execution.

This ensures that the state of a document, exactly as it is currently visible to you, is actually transferred to HELiOS instead of an older state.

Beneath **Search associated drawings by following schema** you can manually enter the suffix to identify drawings for the corresponding CAD drawing. This suffix can be found in the drawing file name, which otherwise corresponds to the file name of the model drawing.

Behaviour when transferring to HELiOS:

Check whether the document needs to be saved first

Search for associated drawings according to the following schema:

File name of the geometry + Suffix

Service Pack 1 2020 (V 2501)

Filter Workspace

The documents displayed in the **Workspace** can now also be filtered so that only the directly opened documents are displayed.

If there are many documents that are open at the same time, this makes the Workspace available to you in linked applications clearer.

🔜 Filter workspace				_		×
Show only opened documents (indirectly loaded docume	ents will	not be sho	wn)			
	Y	Apply	🙀 Rem	nove	Cance	el

Major Release 2020 (V 2500)

Standard Part IDs and document master

The identifiers for standard parts and semi-finished products, which HELiOS needs for the recognition of corresponding parts in the Inventor or SOLIDWORKS interface, are stored in the document master as of HELiOS 2020.

In the context of the update to the 2020 version, the existing identifiers must be migrated.

The current data management at the document master offers many advantages, because this method of working also allows the management of standard parts without a linked article master, allows the linking of several standard parts with an article master (e.g. for handling older data and for semi-finished product documents) iand also allows for semi-finished products the recognition of parts by the length of a semi-finished product.

🔔 Important:

Please observe the related notes regarding update installations of the HELiOS interface with its respective CAD application.

Taking over of file names

In the Inventor, AutoCAD or SOLIDWORKS interfaces you can use the option **Take over original file name** even if documents with the same name have already been saved in HELiOS. This now allows you to work with descriptive file names consistently.

Unchangeability of the file name is a technical prerequisite for parts, for example, when transferring more complex structures (such as iParts/iAssemblies).

File name display and export functions of CAD applications can therefore also provide more meaningful results.

Note, however, that this can make the folder structure of the work area more complex during export.

Multi-sheet PDF output for Inventor, AutoCAD and SOLIDWORKS

When exporting multi-sheet drawings in PDF format, the HELiOS Spooler can be configured to combine the PDF files resulting from the individual drawing sheets into a single PDF file.

HEL_APPLICATION and HEL_APPLICATION_VERSION

The database attributes **HEL_APPLICATION** and **HEL_APPLICATION_VERSION** keep track of the application and the version number of the application with which a document was saved to the database.

This can be useful, for example, to search in the HELiOS Database for parts that were created with an older version of a particular CAD application and should be saved again after a version update of the linked software.

🥃 Edit attribute configuration							
– Available	e attrik	outes	.				
Filter:					\times -		
Docun	nent	1					
	🔒 Ту	pe	Designation	Attribute name			
) F	Related application	HEL_APPLICATION	^		
			/ersion number of related application	HEL_APPLICATION_VERSION			
		T	lype identifier	HEL_ART			

Discontinuation of the Versions 2014 and 2015

As of Version 2500 (HELiOS 2020), HELiOS does no longer support the Versions 2014 and 2015 of the following interfaces:

- AutoCAD
- Inventor
- Navisworks
- SOLIDWORKS

HELIOS in HiCAD

Major Release 2020 (V 2500)

Open, with options: Reduced loading

In the context menu and in the detail window ribbon of a HELiOS document, you will find the new function Open, with options at General, in addition to the familiar functions Open + Edit and Open, read-only.



If the document is an HiCAD drawing file (SZA format), an extended dialogue with additional options for reduced loading appears. This means that you can optionally select how to proceed when loading with isolated points:

Open, with options
Please specify the settings for opening.
Open, read-only
Open, reduced:
Switched off 🗸 🗸
Switched off
Do not delete isolated points
Delete isolated points (except for named points)
Delete isolated points (except for symbol/fitting points)
Delete isolated points (except for fitting points)
Delete all isolated points

You can leave the **Open**, reduced option Switched off at this point or **Delete all isolated points** or **Delete isolated points except for**:

- named points
- symbol / fitting points
- fitting points

You can also activate the **Open, read-only** checkbox in this dialogue if the document should only be loaded for viewing and not for editing.



- The **Open**, with options function does not work for multiple selections, but only for single SZA documents.
- If the document opened with options is not an SZA file but, for example, an Office document, it is opened without another intermediate dialogue.
- If the file type of a document is not known or cannot be assigned to an application for opening, a Windows
 query may appear asking in which application the document should be opened.

HELiOS for AutoCAD

Service Pack 1 2020 (V 2501)

AutoCAD/AutoCAD Mechanical compatibility

The update to HELiOS 2020 Service Pack1 supports the most recent AutoCAD/AutoCAD Mechanical versions.

Major Release 2020 (V 2500)

Important update notes on attribute mapping of title blocks

When performing an **Update** installation to HELiOS 2020, note that the attribute mapping is updated: Until HELiOS 2019, title block attributes in AutoCAD were passed through the heliosac_titleblock.dat and helacblock.xml files.

Starting with HELiOS 2020, the mapping for title block data is done analogously to Inventor, thus eliminating the old files.

At this point, the mapping for HELiOS data in AutoCAD title blocks must be set up manually once again, an automated migration is not possible.

For AutoCAD Mechanical, the change in attribute mapping means that article reference points can also be inserted from HELiOS 2020.

HELiOS for Autodesk Inventor

Service Pack 2020 2 (V 2501)

User-defined semi-finished products

If semi-finished products are not inserted with the As Standard, but the As Custom setting...

DIN 1025-5 IPE		x
Select Table View Family	Info Section designation I 100 I 120 I 140 I 140 I 160 I 180 I 200 I 220 I 240 I 220 I 240 I 260 I 280 I 300 I 320 I 340 I 360 I 380 I 400 I 450 I 500	Bar Length (1 mm - 50000 mm) 100
C As Custom		
As Standard		
2	OK Can	cel Apply

...you can set the option **Insert user-defined semi-finished products from Content Centre as sub-items** in the section **Behaviour when transferring product structure:** of the **HELiOS Options** to ensure that the corresponding semi-finished products are transferred as sub-items into the product structure.

The corresponding item is set to "CAD relevant" and displayed in the **Utilized items** tab of the item master data under **CAD link**.

😤 CAD link	
✓	:

🕖 Please note:

With the update to HELiOS 2502 Service Pack 2 (Version 2502) the virtual database attribute VA_CAD_LINK is replaced by the new Boolean item attribute **CAD link** ("HEL_CAD_RELEVANCE").

CAD relevant items existing in HELiOS are migrated accordingly when updating the database subversion.

Result lists with the CAD attribute are also updated accordingly. However, if interface settings have been imported via the ZIP mechanism of the **HELiOS Desktop** (via **View > Export / Import settings**), the administrator may have to recreate and "distribute" them again.

Link new / existing article

In the Input function group of the HELiOS Part and HELiOS Assembly Ribbon you will find the new functions 🕨

Link new article and The Link existing article.

With these you can create a new article or select an existing article to link it to the open document.

	F	IELIOS - As	sembly	HELIOS	6 - Active part
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	د به ۲	t	e		C Active pr
Create index	Insert external reference		Update propertie	s ,	🔯 Select pr
Input		Transfer	Updatin	g	Pr

Neu (Document / New article index) and New (New drawing index)

The HELIOS Part or HELIOS Assembly Ribbon contains the new function New (Document / New article index) and the HELIOS Drawing Ribbon contains the new function New (New drawing index).

These functions allow to replace an existing AutoCAD drawing with a new Inventor drawing.

"Edit (all)" for active part

New in the **HELIOS** - **Active part** Ribbon is the function **Edit (all)**, which allows you to edit the active part of an assembly in a model drawing.

With this function all parts of the opened (or selected) document can be set to edited mode (i.e. reserved for exclusive editing by the currently logged in user) with a simple click.



Presentation files in drawings

If a drawing is entered into HELiOS that contains an Inventor Presentation file (IPN), the corresponding article of the presentation file is also linked to the drawing via the database shortcut "HELLiOSAiPn", similar to model files

Service Pack 2020 1 (V 2501)

Inventor 2021

The update to HELIOS 2020 Service Pack 1 (V 2501) supports the Inventor Version 2021.

Place document and Place preselected document

In the **Data** function group of the **HELIOS** Ribbon you find two new functions:



With **Place document** you can use the Combined search of HELiOS to select the HELiOS document of an individual part or an assembly, which can then be placed in the active model drawing.

With a click on Place preselected document you can place a HELiOS document in the active model drawing,

which was previously selected with a simple click on the context menu entry **Preselect document** , e.g. in the workspace.

Workflow:	Article number	Document number			Designation
•	SN-026066	DN-000563			
0	SN-026067	DN-000564			
0	SN-026068				
0	SN-026069			Genera	al
•	SN-026070			Show	document
0	SN-026071		5	51101110	
0	SN-026072			Edit do	ocument master
0	SN-026073		4	Presele	ect document
•	SN-026074		*	Add to	favourites
-					

The document can then be placed several times in the model drawing area of Inventor until you complete the placement with the OK command.

Note that this only applies to HELiOS parts and assemblies, other file types cannot be placed.

Improved handling of iParts / iAssemblies

The handling of different configuration sub-types of iParts and iAssemblies in HELiOS has been revised and improved.

Standard	- 🔋 👫 🍢 🗃	- j 🖻 i i					– Input masks –			
ate	Otv.	Article number	Document number	w	Article number	в	Article Document			
and TunerBoard iam	1	SN-025998	DN-000498			-				
= 🍓 🛛 🖽 😡 Tuner-Smi	all:3 1	SN-025999	DN-000499							
B B Tuner.iam	1	SN-026000	DN-000500							
Casting2:1	1	SN-026001	DN-000501			-11				
arge cap:1	1	SN-026002	DN-000502			11	Article number:	SN-025999	Index:	- 1.5.1 1
🕼 📄 small cap:1	1	SN-026003	DN-000503			- 11	Project number:	Project-independent	🔋	
🎲 📄 shaft:1	1	SN-026004	DN-000504			11	Folder number:	Folder-indepempdent		
thrust wask	ner:1 1	SN-026005	DN-000505			- 11	rolder hamberr	rolder-indepermident		
🎲 📄 button:1	1	SN-026006	DN-000506			- 11	Article			
screw:1	1	SN-026007	DN-000507				Designation 1:		· Pelease	
🎡 📄 postcap:1	1	SN-026008	DN-000508						Kelease;	
🎡 📄 hex sleeve:	1 1	SN-026009	DN-000509				Designation 2:		Part type:	Assembly
🎲 📄 trim washe	rc1 1	SN-026010	DN-000510				Standard:		Drawing/Manuf.	
🎲 📄 string post:	1 1	SN-026011	DN-000511							
🎲 📄 hex sleeve	large:1 1	SN-026012	DN-000512				Article info			
🔅 📄 trim washe	r large:1 1	SN-026013	DN-000499				Material:		Unit of quantity	Piece
📸 💼 casting2:1	1	SN-026000	DN-000500			- 11			one or quantity.	
🍓 💼 large cap:1	1	SN-026001	DN-000501				Weight:	0.052334365 [kg]	Resourcing:	
ள் நாவி cap:1	1	SN-026002	DN-000502				Dimensions:		Order note:	
💼 💼 shaft:1	1	SN-026003	DN-000503				Comment:			
in thrust washer:	1 1	SN-026004	DN-000504							
💼 💼 button:1	1	SN-026005	DN-000505				1			
Crew:1	1	SN-026006	DN-000506							
(Chinortean)		SNI-026007	DN-000507			•				
mber of records: 28 Numl	ber of selected records: 41							•		
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For example, when you enter iParts/iAssemblies in the HELiOS database, you can see all the characteristics that can differ in terms of the number of parts and structure, as well as the components of the underlying factory. This factory represents the maximum state with regard to the displayed components.

The same applies to the derivation of the model structure.

In addition, iParts and iAssemblies can also be transferred completely to HELiOS with additional external references (for example, references to derived components or parameter references).

If iParts or iAssemblies have been transferred to HELiOS and drawings are created for individual characteristics,

these can be transferred using the **New in HELIOS** function.

Converter Pipelines

The **Converter** dialogue window for setting conversion properties within the **Attribute assignments** for **Transfer to HELiOS** or **Export from HELiOS** has been extended.

You can use converter pipelines to define concatenations of conversion conditions.

ID	Maximum le	Trim left	Trim right	Expression	Replacement		
DefaultStringConverter		✓	✓				
TruncateFileExtensionConverter		✓	✓	(\.[\w]+)\$			
TruncateUnitExtensionConverter		✓	✓	([\w]+)\$			
ReplaceDecimalIndicator		✓	✓	[,]			
Floating point							
ID	Decimal plac	es F	actor				
DefaultFloatConverter							
DivideBy1000FloatConverter		0	.001				
			0.000001				
DivideBy1000000FloatConverter		0	.000001				
DivideBy100000FloatConverter T ab i up Integer			.000001				
DivideBy100000FloatConverter Integer Integer ID DefaultIntegerConverter	Factor		.000001				
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Substitution objects

When working with substitute geometries, the following must be observed with regard to HELiOS:

Assemblies and substitute geometries should not be selected separately when saving to the HELiOS database via

New in HELiOS, nor when calling the function **Derive model structure**. This also applies to the occurrence of several substitute objects.

In the structure display the substitute objects are marked with an \square icon.



For example, if a substitute object is inserted in a different assembled object without the associated assembly, it cannot be taken over without problems at another location without a clear context. When the substitute object is transferred to the database or the model structure is derived, it automatically receives the same article master as the underlying assembly. After the transfer to HELiOS the substitute object is also displayed in the model structure of the document master data.

Sources × Model structure	e X	Us	se		\times	Folde	ers × Projec
🖘 🐱 Standard	•	1		Đ			
Model					[∎] ∦ Qty.		Article number
🖃 🏪 DN-001141		D			1	0	
🖃 🏪 DN-001142		Þ			5	0	SN-026667
🔂 DN-001144	10	Þ			1	0	SN-026668
🗇 DN-001145	10	Þ			1	0	SN-026669
🔂 🕒 DN-001143		Þ			1	0	SN-026667

Please note:

- A transfer of assemblies is only possible with full attention to detail. This means that if the assembly contains references to substitute objects, these are visualized accordingly in the structure.
- If substitute objects occur, they are briefly loaded when the **New in HELiOS** function is called, or during derivation, which will be visible to the user.
- If a general component is marked as a substitute object, then Inventor deactivates all links. The corresponding
 dependencies are not displayed when the substitute object is transferred to HELiOS, which can become a problem if the property as "substitute object" for the component is deactivated again later. This use case is not supported by HELiOS.
- The indexing of substitute objects is currently not yet supported.
- Please also note that updates when loading or calling the Apply server state (All) function only affect the currently "visible" parts. I.e., sub-parts of an assembly which are currently loaded as substitute objects are not offered for update.

Major Release 2020 (V 2500)

Important Notes on Update installations

For an update of the Inventor coupling from an older HELiOS version to HELiOS 2020 (Version 2500) or higher (and the corresponding update of the database sub-schema) some changes have to be considered:

Since in the course of the update

- 1. the structure identifiers for Inventor parts are updated, and
- 2. the standard part and semi-finished product IDs must be changed to a document-based (instead of articlebased) management,

an automated update installation cannot be executed before the migration has been prepared accordingly. In this case, please contact the ISD Group Consulting.

New installations of HiCAD 2020 and its database are not affected.

Identification of semi-finished products as "COMPONENT_TYPE" sub-types

Dependent parts/assemblies of the part type "Semi-finished product+plant construction" are inserted as sub-items in the product structure.

In the **Database** settings of the **HELiOS Options** you can set under **General** which value is to be written to the article master (attribute "COMPONENT_TYPE") by default as part type for semi-finished products. The default setting is "Raw part+Plant design".

General settings	CAD System
Optional Drag _Drop for follow-on sheet	No
Vault Server	No
Allow forced releases	Yes
Test statuses in role workflows can be ignored	No
Link E-mail	E-Mail Attachment
Apply workflow of last state for revision	Yes
Issue error message for undetected master data objects	No
Article attribute for defined weight	
Article attribute for surface area	FLAECHE
Article attribute for material (weight-relevant)	MATERIAL
Article attribute for body volume (weight-relevant)	
Article or material attribute for specific weight	RHO
Master link for product structure	
Default language	en
Default RMS file for product structure output	PRODUCT_Stahlbau_01.R
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	No
Article master, Part type for semi-finished products	Raw-part+Plant-design 🔽

Attribute mapping: Transfer of part dimensions

For the calculation of the bounding box of a part and further use of the calculations, the HELiOS attribute mapping for single parts was extended by three virtual attributes.

 Virtual properties 	
Sub-type	110
Sheet	False
Width (Y-direction)	30
Height (Z-direction)	5000
Catalogue	11dea241-3e29-4894-9654-6c8d07453054
Component type	2
Lenath	50000,000 mm
Length (X-direction)	15
Standard part copy	0
Weld seam group	False

Please note the following details:

- The attributes are only available for individual parts.
- The Bounding Box is aligned with the body coordinate system of the component. Inventor does not guarantee that the bounding box is minimal.
- If individual parts are changed (e.g. shortened) using assembly features, this is ignored by the calculation. The bounding box always refers to the part itself (i.e. to the IPT file on which the part is based).
- The dimensions are always returned in the unit "cm".

Support of part and assembly configurations (iParts / iAssemblies)

In the past, if iParts or iAssemblies were optionally not copied with the original file name, problems could occur. HELiOS 2020 supports this configuration.

Article assignments in the context of the New in HELiOS function are now always configuration-specific, for example.

	i i "e 💷	D 📑 ie			- Input masks				
ate	Qty.	Article number	Document number	W Article number B	Article Document				
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🗉 🎆 💼 🎛 Tuner-Small:3	1	SN-025999	DN-000499						
Mile Automatically any and d	and have seen to	SN-026000	DN-000500						
Automatically generated th	rom base part	SN-026001	DN-000501			011 005000		1	_
👘 🖻 small cap:1	1	SN-026002	DN-000502		Article number:	SN-025999	Index:	- 1.5.1 -	5
👘 🖻 shaft:1	1	SN-026003	DN-000503		Project number:	Project-independent			-
📾 📄 thrust washer:1	1	SN-026004	DN-000504		Folder number:	Folder-indepempdent			
🛍 💼 button:1	1	SN-026005	DN-000505			Totaci indepennaene ini			
🕷 💼 screw:1	1	SN-026006	DN-000506		Article				
👘 💼 postcap:1	1	SN-026007	DN-000507		Designation 1:		T Delencer		
縮 💼 hex sleeve:1	1	SN-026008	DN-000508				Kelease.		
👘 💼 trim washer:1	1	SN-026009	DN-000509		Designation 2:		Part type:	Assembly	_
👘 💼 string post:1	1	SN-026010	DN-000510		Standard:		Drawing/Manuf.:		
👘 💼 hex sleeve large:1	1	SN-026011	DN-000511						_
👘 💼 trim washer large:1	1	SN-026012	DN-000512		Article info				
🗏 🍓 💼 🖽 Tuner-Large:4	1	SN-026013	DN-000499		Mahasiah			Dises	
a casting2:1	1	SN-026000	DN-000500		Material		Unit of quantity:	Piece	_
🙀 💼 large cap:1	1	SN-026001	DN-000501		Weight:	0.052334365 [kg]	Resourcing:		
🙀 🖻 small cap:1	1	SN-026002	DN-000502		Dimensions:		Order poter		
🛍 💼 shaft:1	1	SN-026003	DN-000503		C		Order note:		
📸 💼 thrust washer:1	1	SN-026004	DN-000504		Lomment:				_
🛍 💼 button:1	1	SN-026005	DN-000505						_
🛍 💼 screw:1	1	SN-026006	DN-000506						
🖓 🖻 nortcan:1	1	SNI-026007	DNL000507		*				
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iParts and iAssemblies are managed in HELiOS as a document master; you can switch between the different configurations in the model structure, for example.

For linked articles, a corresponding configuration context has also been added.

General Assignments Input	t Output				
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Edit Preselect Open master data + Edit • Wo	Edit I rkflow status	Roles Attrib valu	oute Notes Mark	-up Expor	t Import file
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Model] [□] ∦Qty.	Article number	00	Designation
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DN-000501	22 23	1 4	SN-026001	1	0
DN-000502	20	1 4	SN-026002	1	Ð
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DN-000503	De De	1	SN-026003	1	0

DN-000498 (Document), Link: SN-025998

In the past, if iParts or iAssemblies were optionally not transferred with the original file name, problems could occur. As of HELiOS 2020, iParts or iAssemblies are now always transferred to the system with the original file name.

HELIOS for SOLIDWORKS

Service Pack 2 2020 (V 2502)

Batch import and batch update

In the HELiOS menu you will find the new functions Batch import (Models), Batch import (Drawings) and Batch update.



With the **Batch import (Models)** function you can import a variety of files from a directory to HELiOS with a few clicks via a selection dialogue.

When you call the function, a dialogue window opens for selecting the directory from which .ipt and .iam files are to be imported in batch processing.

🐳 🐨 🔯 🔊 V Automatic check-in 🛛 🗸 Automatic clear	ring of Workspace	
File name	File extension	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE00003A03.SLDASM	.SLDASM	
D:\Dampfmaschine\Baugruppe1.SLDASM	.SLDASM	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039ZX.SLDASM	.SLDASM	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039YR.SLDASM	.SLDASM	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039Z3.SLDASM	.SLDASM	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039YL.SLDASM	.SLDASM	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039YX.SLDASM	.SLDASM	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039Z9.SLDASM	.SLDASM	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039ZR.SLDASM	.SLDASM	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039YF.SLDPRT	.SLDPRT	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039TX.SLDPRT	.SLDPRT	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039ZL.SLDPRT	.SLDPRT	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039VX.SLDPRT	.SLDPRT	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039TF.SLDPRT	.SLDPRT	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039VR.SLDPRT	.SLDPRT	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039WR.SLDPRT	.SLDPRT	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039ZF.SLDPRT	.SLDPRT	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039TL.SLDPRT	.SLDPRT	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039W3.SLDPRT	.SLDPRT	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039VL.SLDPRT	.SLDPRT	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039V9.SLDPRT	.SLDPRT	
D:\Dampfmaschine\REV0IDB00XDMPDVVWPXE000039U3.SLDPRT	.SLDPRT	

With the **Batch import (Drawings)** function referenced drawings can be taken over "afterwards", which were not considered during the batch import of the models due to the naming convention.

And with the **Batch update** function you can update a multiple selection of HELiOS documents "in one go" using the combined search.

The documents are loaded, set to edited state, updated and checked in one after the other (they are not automatically removed from the workspace). In this way you can, for example, perform an update

- of older documents to a current CAD version
- due to changed HELiOS configurations (e.g. if a user has adjusted the attribute mapping and older files have not yet been modified accordingly)
- due to changed CAD configurations
- of document previews
- after a data transfer, if the transferred files have not been saved by the CAD interface (this means "adding" preview images, model and product structures, attribute mappings, etc.)

and avoid time-consuming updates by manually opening and saving documents in each case.

The prerequisite for calling the functions is that no HELiOS document is active.

Link new / existing article

The HELiOS Part and HELiOS Assembly Ribbon contain the new functions **Link new article** and **Link existing article**.

With these you can create a new article or select an existing article to link it to the open document.

You will be asked if the article should be linked configuration specifically:

Link article configuration-specifically

Do you want to link the article configuration-specifically?

CANCEL	NO	YES
		v.

The exception are Toolbox parts for which article masters are always linked configuration-specifically (without query).

Place document and place preselected document

In the **HELiOS** menu of SOLIDWORKS you will find the two new functions **Place document** and **Place preselected document**.



With **Place document** you can use the HELiOS combined search to select the HELiOS document of a part or an assembly, which can then be placed in the active model drawing.

With **Place preselected document** you can place a HELiOS document in the active model drawing that was previously selected with a simple click on the context menu entry **Preselect document**, for example in the Workspace.

Workflow:	Article number	Document number		Designation
•	SN-026066	DN-000563		
0	SN-026067	DN-000564	Ļ	
0	SN-026068			
•	SN-026069		Genera	al
•	SN-026070		Show	document
•	SN-026071		5110111	Jocumenta.
0	SN-026072		Edit do	ocument master
0	SN-026073	a	Presele	ect document
0	SN-026074	a	Add to	favourites
-	Ch1 000075			

The document can then be placed several times in the drawing area of SOLIDWORKS until you confirm the placement with the **OK** command.

Note that this only applies to HELiOS parts and assemblies, other file types cannot be placed.

Toolbox support and configuration sub-types

Various sub-types of standard parts that are managed in the SOLIDWORKS toolbox configuration-specifically are taken over by HELiOS with configuration-specific article masters.

DN-000	DN-000682 (Document), Link: SN-026190							
General	Assignments	Input	Output					
Edit master data	Preselect Ope + Edi	n t + Workf	Edit low status	Roles	Attribute values	Notes M document •		
Mask	× Model stru	icture ×	Graphic	\times	Targets	× Sources		
🆘 🐱 St	andard	•	₽1 ₽1 [#]	- A		-		
Model				A		Inum		
🌯 DN-0	00682		>	C C				

Please note the further notes on the behaviour of standard parts.

"Edit (all)" for active part

New in the **HELiOS** - Active part Ribbon is the function **Edit (all)**, which allows you to edit the active part of an assembly in a model drawing.

With this function all parts of the opened (or selected) document can be set to edited mode (i.e. reserved for exclusive editing by the currently logged in user) with a simple click.

Ď	S SOLID	WORKS	►	ľ	â 🗋 - 🖻
	Edit	ٹے Edit (all)		Save	Check-in (

Recognition and preventing of part dependencies

So-called "in-context dependencies" can occur in SOLIDWORKS when the user edits features of sub-assemblies in the context of an assembly, while this feature refers to other elements of the assembly. Such dependencies are recognized by HELiOS and for assemblies that have parts with these dependencies, a call of the **New in HELiOS** function (whose execution would not preserve the dependencies) is prevented.

Document configuration information (VA_DocumentTargetConfigInfo)

In the attribute configuration of article/document links for result lists (e.g. for link line in the article detail window) you will find in addition to the virtual attributes **Document configuration** ("VA_DocumentTargetConfigName", the name of the configuration of a document is stored here) and **Document configuration ID** ("VA_DocumentTargetConfigId", the unique identifier of the configuration of a document) also the new virtual attribute **Document configuration** ("VA_DocumentTargetConfigId", the unique identifier of the configuration of a document) also the new virtual attribute **Document configuration** ("VA_DocumentTargetConfigInfo").

vailable attributes				- Selected	attributes
er:		Χ.		🚞 List	🖳 Context menu
Document 🕼 Article 💊 Article/document li	ink 4▶ Link			1	Result list display: Standard (Helios.RL.Link.Targ
Image: Stress of the stress	Attribute name VA_DocumentTargetConfigName	<u> </u>		Type	Object type Designation
Image: Configuration information Image: Configuration information	VA_DocumentTargetConfigInfo		•		Index Index
tribute description: iormation on the configuration of the linked document		*		Width of sel	ected column (px): 175
Show column for attribute names				Horizontal a	lignment: Left aligned

If a corresponding information is available, the attribute shows you the configuration name, the configuration ID or "Default Article" if the linked article is a default article.

Mask	× Documents	\times Graphic	× Targets	× Use	× Proc	duct structu	re >
49 💌 🍓	Standard	• 7	K				
O Open +	Number	Documer	nt configuration info	ormation D	esignation	Ind F	Rel
B	ON-00218	Default ar	ticle	3-	D Model	•	2 🕑

Service Pack 1 2020 (V 2501)

Extended range of HELiOS functions

With the update from HELiOS 2020 to Service Pack 1 (Version 2501) additional functions are available in the ribbon for HELiOS Parts / Assemblies / Drawings or for the Active part:

With the function **Apply server state** you can check whether the currently loaded or the active document is up-to-date. If this is not the case - e.g. because the document has been saved from another location or is available with a newer index, or because the master data of a linked article has changed or is available with a newer index -

you can use this function to transfer the current server status. With **Apply server state (All)**, all documents that are subordinate to the active document can be brought to the current server state with one click.

With **Edit (All)**, the complete model drawing (i.e. not only the active document) can be set to edited mode with one click. Provided that you have a corresponding editing permission in HELiOS, as many sub-assemblies and sub-parts as possible can be set to edited mode, taking into account all dependencies.

You can add HELiOS documents to the CAD structure as external reference files using the **freence** function. For example, Office files with further information.

In addition, the Ribbon menu provides new functions for editing the workflow status of documents and articles, for exchanging components via the HELiOS database, for opening linked drawings, and for displaying the editing status.

Edit Edit (AII)	😪 🥑 Save Check	to in Check-in ((All)	8 1 Cancel Canc	to D _e cel (All) Apply server state	Apply server state (AII)	at Article	Horizonta Contraction Status	New in De HELIOS	erive model Cr structure Ir	reate ndex	Insert external reference	ත්ද Update properties	Update properties (AII)	□ ○ € % Image: Constraint of the second sec	(R) Show/hide workspace	26 Options
				HELIOS - Active Part	HELIOS - Assembly	1						ØÖ	a 🗊 🎬	- 👔 - 🔶 - 🚱 🕹 - [. .	

Default articles and configuration-specific articles

When selecting an article for a document (including configuration), you will be asked whether this article is a default article. In principle, a document can be linked to several default articles.

In addition to default articles, there are also configuration-specific articles.

Different configuration characteristics of a document can be assigned either to a unique default article or to an individual configuration-specific article.

If an article context is not unique, you are asked to make a unique assignment.

😻 Link article configuration-specifically

Do you want to link the article configuration-specifically?

CANCEL	NO	YES
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Major Release 2020 (V 2500)

Important notes on update installations

For an update of the SOLIDWORKS coupling from an older HELiOS version to HELiOS 2020 (Version 2500) or higher (consider the following:

- Since a configuration migration is performed during the update, an automated update installation cannot be performed until some appropriate preparations have been made in your system. In this case, please contact the Consulting department of ISD Group.
- Please also note: When updating the database of an older version to HELiOS 2019 Service Pack 2 or higher, the old workspace is checked for documents in process before each update step. If the check finds corresponding documents, the following message will appear: The database update cannot be performed because there are still locked documents in old local workspaces that will not be supported in the future. After this update, only workspaces with new management will be supported and an automatic migration is not possible.

Click here for more information.

Please also note that the update to HELiOS2020 updates the attribute mapping. The old configuration files are no longer required (heliossw_titleblock.dat, helios_cs_global_config.dat, sw_comp_name.dat).

Since an automated migration is not possible, the mapping must be set up manually once again.

New installations of HELiOS 2020 and associated database are not affected.

HELiOS 2020 with enhanced SOLIDWORKS interface

With HELiOS 2020 (Version 2500) you will find a fundamental revision of the SOLIDWORKS interface in functional and performance terms.

- The HELiOS mask technology has been fundamentally revised to match the latest state-of-the-art.
- There is a new Options dialogue for controlling the update of index levels when loading parts/assemblies.
- You can use the enhanced attribute mapping.
- The current **New in HELIOS** function for transferring the CAD model structure to the HELIOS database replaces the former "HELIOS Info Center".
- Standard parts are handled configuration-specific: A distinction is made between default articles and configuration-specific articles.

Default article	Document / Configuration	Configuration-specific article	Effective article
A4711	Configuration 1		A4711
	Configuration 2		A4711
	Configuration 3	A4712	A4712
	Configuration 4	A4712	A4712
	Configuration 5	A4713	A4713

Default article	Document / Configuration	Configuration-specific article	Effective article
A4710	Configuration 1		ambiguous
A4711	Configuration 2		ambiguous
	Configuration 3	A4712	A4712
	Configuration 4	A4712	A4712
	Configuration 5	A4713	A4713

• Furthermore, you can change the user during operation.

SOLIDWORKS 2020

HELIOS 2020 supports the most recent SOLIDWORKS Version 2020.

Navisworks Interface

Service Pack 1 2020 (V 2501)

Navisworks 2021 The update to HELiOS 2020 Service Pack 1 supports the most recent Navisworks version.

HELiOS for Zuken E3 -What's New?

Service Pack 1 2020 (V 2501)

New (Document/Find article)

In the HELiOS menu of your E3 interface you will find the new menu item **New (Document / Find article)**.

This function call saves the opened document (via the New in HELiOS dialogue window) with a new document master in the HELiOS database, which you can link to an existing article via the automatically called Find article mask of HELiOS.

Service Pack 1 2020 (V 2501)

Enhancement of the HELiOS-E3 interface

The HELiOS interface for the electrical engineering system E3 was extended as follows:

- The article synchronization for E3 components is now bidirectional by means of a synchronization service.
- When transferring an E3 project to HELiOS, the corresponding article master can optionally be searched for in HELiOS. The E3 project is then automatically linked to it.
- E3 projects can now be converted into PDF files using the HELiOS Spooler.

Internet Server

Major Release 2020 (V 2500)

New HELiOS Internet Server

With HELiOS 2020 (Version 2500) there is a new HELiOS Internet Server (HIS) that replaces the previous version. The new HIS is available via the installation DVD. In previous versions, the HIS consisted of the three server components:

Frontend (UI)

Backend (API)

Authentication

Within the scope of the 2020 version, the authentication part has now been integrated into the other two server components. This makes installation and maintenance easier for the Administrator.

The installation is done as usual and very easily via the installation menu of HELiOS or HiCAD.

When updating an older version to the new HIS you need consulting by the ISD Group, because an automatic migration of your specific adaptations from the old HIS to the new HIS is <u>not</u> possible.

Legal notes

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