HiCAD PDM

Installation Notes

HiCAD PDM

Version 2027

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Before You Begin Installing or Updating

Important Notes!

HELiOS becomes HiCAD PDM

From version 2027 onwards, HiCAD is the collective name for our product family. The CAD system is called **HiCAD 3D**. The PDM system, previously known as HELiOS, is now called **HiCAD PDM**. Both products remain unchanged; what has changed are the names and the places where these names appear: program files, the Start menu, directories and settings. You can find further information on HiCAD 3D here and on HiCAD PDM here.

Hardware Exchange

If you use local HiCAD PDM licenses and want to exchange any hardware components, modify the partitioning of, or re-install the operating system, you need to revoke the existing license on the HiCAD PDM workstation first, and request, using the new hardware or modified configuration, a new license key (further information on the procedure can be found in the software documentation).

If a revocation is technically possible, but will not be performed, the ISD reserves the right to charge costs in an appropriate amount for the reissuing of the license. If the license will not be revoked, or if such revocation is no longer technically possible, the ISD may request proof that the unrevoked license is no longer utilisable; in case of failure to produce such proof, the ISD reserves the right to refuse the transfer of the license to a new hardware.

Discontinuation of Windows® 10

Microsoft® has discontinued support for the Windows® 10 operating system in October 2025. For compatibility reasons, HiCAD 2025 SP2 and HELiOS 2025 SP2 were the last versions of our CAD or PDM system to support Windows© 10. HiCAD 2026 and HELiOS 2026 no longer run under Windows© 10.

Operating system

We recommend deactivating local licenses and network licenses before performing an update/upgrade of the operating system (e.g. from Windows 10 to Windows 11), and activating them again after successful update/upgrade of the operating system.

Backup HiCAD PDM

It is mandatory to make a database backup before carrying out an update, as the update can normally only be reverted by importing the backup.

Discontinuation of the Plant Engineering/Layout Planning module

From HiCAD 3D 2027 (Version 32.0) onwards, the **Plant Engineering/Layout Planning** Extension Module will no longer be supported. Customers with a maintenance contract for the Plant Engineering/Layout Planning module will automatically receive the **Pipeline Planning** Extension Module when they update. Additional features from the Plant Engineering/Layout Planning module will be incorporated into Pipeline Planning.

Discontinuation of various HiCAD modules

Starting with HiCAD 2026 (Version 31.0), the following HiCAD modules will no longer be supported:

- **HiCAD classic** and **HiCAD creator**

  The extension modules that previously required HiCAD classic or HiCAD creator now require HiCAD solution. Customers with a maintenance contract for one of the two modules will automatically receive HiCAD solution when they update.

- **HiCAD Sheet Metal suite**

  Customers with a maintenance contract for HiCAD Sheet Metal suite will automatically receive Sheet Metal suite premium when they update.

- **Metal Engineering suite classic**

  Customers with a maintenance contract for HiCAD Metal Engineering suite classic will automatically receive HiCAD solution when they update.

- **Report Manager professional**

  The additional functionality of the Report Manager professional has been integrated into the Report Manager.

From HiCAD 2026 onwards, the following change to the module structure applies:

- **Steel Engineering suite premium**

  The extension module Sheet Metal professional has been integrated into the Steel Engineering suite premium.

Discontinuation of HELiOS 32 Bit, HiCAD Viewer 32 Bit and Office Interface 32 Bit

Since HELiOS 2022 (Version 2700.0) there is no 32 Bit version available for HELiOS and the HiCAD Viewer. Since Microsoft has also offered a 64 Bit installation of Office since Office 2010 and many add-ins for Office are now also available as 64 Bit versions, with HELiOS 2024 we will support an Office interface only for a 64 Bit Office. If you are still using the Office interface in conjunction with a 32 Bit Office, you must uninstall your Office version and reinstall it as a 64 Bit version as soon as you update to HELiOS 2024.

Discontinuation of Microsoft SQL Server 2012 and 2014

Microsoft® discontinued support for **SQL Server 2012** in July 2022 and no longer provides security updates. As a result, **SQL Server 2012** will no longer be supported from **HELiOS 2025** onwards.

Also, Microsoft® discontinued support for SQL Server 2014 in July 2024. Therefore, SQL Server 2014 will no longer be supported from HELiOS 2026 onwards.

Discontinuation of Office interfaces for Office 2013, 2016 and 2019

Microsoft® has discontinued support for **Office Versions 2013**, **2016** and **2019** and no longer releases security updates for these versions. Therefore, starting with **HELiOS 2026** (Version 31.0), Microsoft Office interfaces for **Office 2013**, **2016** and **2019** will no longer be supported.

Discontinuation of the Spooler Client

As of HELiOS 2025 (Version 30.0), the **Spooler Client** tool for limiting parallel printing processes is no longer supported.

Discontinuation of the HELiOS.Briefcase tool

As of HELiOS 2025 (Version 30.0), the HELiOS.Briefcase tool for synchronising separate HELiOS databases will no longer be supported.

In order to be able to continue working at different locations without significant latency to the database, the corresponding workstations must be provided centrally, and appropriate remote access to the environment must be set up.

Discontinuation of the Zuken E3 interface

As of HELiOS 2024 (Version 2900.0) we will no longer support the Zuken E3 interface.

Discontinuation of Oracle

As of HELiOS 2022 (Version 2700.0), Oracle will no longer be officially supported as a database system! Please migrate to a SQL Server as soon as possible.

Discontinuation of old Multi-CAD/CAE interfaces for HiCAD PDM 2027

As of HiCAD PDM 2027 (Version 32.0), the following versions of Multi-CAD/CAE interfaces are no longer supported:

- AutoCAD 2024 or older
- AutoCAD Mechanical 2024 or older
- Inventor 2024 or older
- EPLAN 2022 or older

Before installing or updating, please check if your current interfaces are supported by HiCAD PDM.

User & Workflow Manager: Discontinuation of connection line settings

In earlier versions of the **User & Workflow Manager** (formerly “EDBSetup”) in HiCAD PDM, it was possible to change the properties of connection lines – such as line colour and line width – within a workflow via **Extras -> Configuration**.

As the display of workflows is being redesigned as part of the tool’s overhaul, this menu option will be removed from HiCAD PDM 2027 onwards.

Discontinuation of the classic workflow management

Please note that the so-called **classic workflows** have been removed from the standard database supplied with HELiOS 2026 Service Pack 1. This means that if you are already working with HELiOS and do not install a new database, nothing will change for you. If you are still working with the classic workflows, these will continue to be available to you. When installing the HELiOS standard database for the first time, you will only be able to work with the **modern role workflows** from HELiOS 2026 Service Pack 1 onwards.

Discontinuation of the "old" Report Manager

From HELiOS 2024 onwards, the "old" Report Manager, i.e. the Report Manager up to 2022, will no longer be delivered with a standalone installation of the HELiOS Desktop. In a HiCAD/HELiOS installation or a HELiOS update of HiCAD, however, the "old" Report Manager is still included. From HiCAD 2025 onwards, only the "new" Report Manager as of 2023 will be supported.

Discontinuation of the ISD.PDM.API

Before carrying out a HELiOS update (HiCAD PDM from 2027 onwards) for an older HiCAD version (HiCAD 3D from 2027 onwards), please note that from HELiOS 2022 omwards, the previous ISD.PDM.API will be discontinued and replaced by the new API from Helios.Interface. If you use customisations that use functionalities from the previous ISD.PDM.API, you must update the customisations to the new API before carrying out the HELiOS update. If you use customisations that use functionalities from the HiCAD API, you should ensure that the HiCAD version used is at least version 2502.5 or 2601.1 or newer. If you are unsure whether you are using corresponding adaptations, please talk to your administrator or contact the ISD in case of doubt.

Central configuration directory: Only UMC paths permitted

Please note the following when working with a **central (cross-computer) directory for configuration data**:

Following an update to HiCAD PDM 2027 or higher, only a UMC path is permitted here. If, during an update installation, change installation or new installation, a path containing a drive letter is specified (e.g. “D:\(...)”), you will receive a corresponding error message. Similarly, specifying “ProgramData” paths is not permitted. You may also receive a corresponding error message in this case.

If such a path was entered incorrectly during a previous installation, it must be changed when updating to HiCAD PDM 2027 or higher.

New Plugin Management starting with HELiOS 2025 SP2

- Customer-specific plugins that were integrated into HELiOS 2025 via the HELiOS.exe.config file will not be automatically transferred to the new Plugin management when updating to HELiOS 2025 SP2 or higher. They must therefore be entered manually once in the HELiOS Options on the **Plugins** tab.
- In future updates, the HELiOS Update (HiCAD PDM Update from 2027 onwards) will then automatically update the settings for the plugins stored in the HELiOS Options. Only the plugins themselves may need to be updated beyond the limits of a release cycle.
- Please also note that, starting with version 2025 SP2, managing plugins via the HELiOS options replaces the manual modification of the HELiOS.exe.config that was required in earlier versions. As a result, after installing HELiOS, there is no longer a Plugins folder under (...)\exe\.
- When installing an update for HELiOS Desktop in standalone mode, a backup of the existing plugin directory is automatically created. However, this does not happen when updating a combined HiCAD/HELiOS installation, as the installation routine cannot distinguish between HiCAD and HELiOS plugins.
- If a plugin has been accidentally copied to the HELiOS EXE directory, an error message appears instructing you to remove the relevant plugin DLL from the invalid directory and then restart HELiOS.
- The functionality for pipeline planning with HiCAD (working with pipe classes and variants) can now be enabled or disabled for the desktop via the HELiOS options in the General section. Previously, the corresponding plugin had to be enabled or disabled manually in the HELiOS.exe.config file.

License Server as of 2025 SP2

The **AdminToolsServers** for the license server are now 64-bit; they are installed by default under **Program files\ISD Software und Systeme\AdminToolsServer**. After installation, you will find the **ISD License Manager (Server)** in the Windows Start menu under **ISD Software und Systeme**. Unlike the Client, the corresponding EXE file is called **ISDLicenseManagerAdmin.exe**. The **Sentinel RMS License Manager** is still 32-bit.

HELiOS Workspaces: Conversion of the system directories

When installing an update from an older version to HELiOS 2025 (from 2027: HiCAD PDM, version 32.0.0) or higher, please note that the directory structure will change (again). As automated migration is not possible, all users must (and, when updating to HiCAD PDM 2027, may need to do so repeatedly) check out all data and clear their workspaces before installing the update to avoid data loss.

In earlier versions, the workspaces were located under %localappdata%. This meant that different workspaces could exist on a single system. To address this, the workspaces were moved to the **%programdata%** directory.

Checked-out files are then located under **%programdata%\Hicad\Pdm\Workspace\(...)***\ (*plus Location ID and User ID). Depending on the version, the workspace databases will be located under **%programdata%\Hicad\Pdm\32.0\General\Locations**.

Microsoft SQL Server

The SQL Server Native Client (often abbreviated to SNAC) has been removed by Microsoft from SQL Server 2022 (16.x) and SQL Server Management Studio 19 (SSMS). It is recommended to use the latest version of the Microsoft ODBC Driver for SQL Server instead.

Further information can be found on the Microsoft website or in the installation instructions for Microsoft SQL Server 2022.

Transfer HiCAD sheet structure to HiCAD

From HELiOS 2023 onwards, when printing drawings, information relating to the HiCAD sheet structure will be used; this information will be transferred when a drawing is saved using HELiOS. For existing data that has not yet been resaved, this information is missing, and printing via HELiOS is not possible.

When HiCAD is started with HELiOS (HiCAD PDM from 2027 onwards) after installing the update, a message will appear and you can add the HiCAD sheet structure for existing data. See also the PDM Online Help.

Mark-up und redlining

Using the **HiRedLine.exe** tool (Redline.exe from 2027 onwards), you can add correction notes or suggested changes to a HiCAD design drawing without altering the underlying original file.

From HiCAD 2023 onwards, this tool will only be available as part of a HiCAD 3D installation. It will no longer be possible to run it with a standalone installation of the HELiOS Desktop (from 2027: HiCAD PDM Desktop)

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Data compatibility

When carrying out a HiCAD PDM update, the PDM version is displayed on the update's start screen. This must match the existing database version. If it does not, an error message will appear when you start HiCAD. You can update the database version using the **PdmSetup.exe** program. If the database version needs to be updated, older versions of HiCAD will **no longer** be able to access the database. All workstations that access the database must therefore be upgraded at the same time.

Update HiCAD PDM

In the context of HiCAD PDM Update Installations, the last 5 release cycles are supported. As of HiCAD PDM 2027 (Version 32.0.*), you can only update installations from 2022 (Version >= 2700.0) and newer.

Attribute mappings: Conversion of the default mapping

With HELiOS Major Release 2022 (V. 2700) an adjusted standard attribute mapping is delivered. By converting the mapping for designating component names to configuration-specific attributes, a significant performance increase was achieved.

Existing mappings, which are generally not changed by an update installation, should be updated to the new standard manually. Please refer to the PDM Online Help.

HiCAD PDM Data base schema

As existing datasets with non-compliant conditions may cause conflicts during the central update process of the HiCAD PDM delivery database, you should consider the following:

1. **Create a database backup**: You should make sure that a backup of your HiCAD PDM database has been created before the update. This can be done with the **HiCAD PDM Database Import & Export** tool or via your SQL Server application. Please contact the ISD hotline if you have any questions or need support for your individual system architecture.
2. **The log file of the update**: If any conflicts arise during the update, these are recorded in the log file PdmUpdate.txt (%AppData%\Hicad\Pdm\<Major.Minor>\Logging\PdmUpdate). Please have this file to hand should you need to contact ISD Support to resolve any issues and carry out a successful update in the event that the update does not complete without errors.

Material Manager

The Material Manager (materialmanager.exe) that enables a taking over of materials from Catalogue Editor to HiCAD PDM needs to have the same database version as HiCAD PDM. Therefore the Material Manager will also be updated.

List attributes

The database version update (PdmSetup.exe) checks from HELiOS 2022 onwards whether list attributes with other data types than VARCHAR exist. If this is the case, the database version update for updating the database schema will not be carried out. In this case, please contact the ISD in order to migrate with the help of the Consulting the corresponding attributes to data types that will be supported in the future.

Units for attributes when working with the HiCAD-HELiOS interface

If you work with the HiCAD-HEliOS interface and want to use interface-relevant units for attributes, then you must work with HiCAD 2022 (V 2700) or higher.

User-defined columns in catalogue tables

Until now, the creation of user-defined columns was only possible for tables in the **Factory standards** catalogue. From HiCAD 2024 this is supported for tables in all catalogues. For this purpose, the table function **New column** has been extended. With this extension, the columns CUSTOM1 to CUSTOM9, which were previously predefined for this purpose (before HiCAD 2024), are no longer needed and have been removed from the table.

During a catalogue update, however, only empty CUSTOM columns are removed from the tables.

Omission of the system files KSTEXT_STDKOP.DLL and TEILHOST_NEXT.EXE

As of HELiOS 2022 (V. 2700), the system file KSTEXT_ STDKOP.DLL and the executable file TEILHOST_NEXT.EXE are omitted. Customer-specific adjustments to your system, in which these files were used, must therefore be adjusted again.

Please contact the Consulting team of the ISD Group.

System Requirements

- HiCAD PDM Database Server
- HiCAD PDM Vault Server
- HiCAD PDM Client
  - Compatibility Matrix for Interfaced Applications (HiCAD PDM)
- HiCAD PDM Internet Server
- Job Server
- License Server
- Operation in Virtual Environments
- Further Requirements for Installation

System Requirements for the HiCAD PDM Database Server

The requirements with regard to the hardware primarily depend on the specifications given by the respective supplier (Microsoft). Currently, following operating systems are supported:

	HiCAD PDM 2027	HELiOS 2026	HELiOS 2025
Microsoft SQL Server 2025	✓	✗	✗
Microsoft SQL Server 2022	✓	✓	✓
Microsoft SQL Server 2019	✓	✓	✓
Microsoft SQL Server 2017	✓	✓	✓
Microsoft SQL Server 2016	✓	✓	✓
Microsoft SQL Server 2014	✗	✗	✓
Microsoft SQL Server 2012 or older	✗	✗	✗

In addition, the following minimum requirements should be guaranteed for the main memory and hard disk:

	HiCAD PDM 2027	HELiOS 2026	HELiOS 2025
Main memory	Additionally at least 4 GB main memory. With an increasing database size the working memory should be enlarged in order to guarantee optimal performance.		
Hard disk	Additionally at least 10 GB hard disk memory. The actual demand depends on the size of the database.		

Please note:

- The use of virtual servers is essentially possible. Please consider to grant sufficient resources within the virtual environment.
- On the database server, HiCAD PDM data base should be imported beforehand, for example via HiCAD PDM Database Import & Export tool, so that clients can connect with the database.
- For information on the compatibility level of the PDM database, please refer to the SQL Server 2025 Installation and Setup Guide.
- SQL Server Standard vs. SQL Server Express
  The productive use of SQL Server Express is also possible. Please note that SQL Express has limited storage size (10 GB) for each data base and provides weaker performance than SQL Standard, especially on powerful hardware. If well-equipped hardware is used for the server (multiple processors and plenty of RAM), the SQL server thwarts the performance again. On regular desktop hardware the difference between SQL Express and SQL Standard is smaller due to the accordance of express limits and system. A detailed comparison of the different SQL Server editions can be found on the manufacturer's website.

- Please note that the semicolon must not be used as a special character in the password for connecting to the SQL Server.

System Requirements for the HiCAD PDM Vault Server

The minimum requirements are as follows:

	HiCAD PDM 2027	HELiOS 2026	HELiOS 2025
Processor (CPU)	64 Bit processor		
Main memory	Additionally at least 4 GB main memory		
Hard disk	The required hard disk space depends on the volume of arising data use (files). A safety margin should be considered. For optimal performance we recommend using an SSD drive.		
Operating system	Microsoft Windows 11 or Microsoft Windows Server 2016 or higher		

Please note:

- If you work with only interfaces to HiCAD 3D and/or Microsoft Office, the use of HiCAD PDM Vault Servers is optional. Other interfaces must be used in conjunction with the HiCAD PDM Vault Server.
- The needed hard disk space can also be distributed on multiple volumes.
- We recommend the use of RAID system in order to ensure failsafe performance.

System Requirements for the HiCAD PDM Desktop

The minimum requirements for the HiCAD PDM Client are as follows:

	HiCAD PDM 2027	HELiOS 2026	HELiOS 2025
Processor (CPU)	64 Bit processor		
Main memory	Additionally at least 4 GB main memory		
Hard disk	Additionally at least 2 GB free hard disk memory		
Operating system	Microsoft Windows 11 or Microsoft Windows Server 2016 or higher		

The interfaces that are available for the HiCAD PDM Desktop are listed in a Compatibility Matrix.

Please note:

- When linking a HiCAD PDM Desktop to other applications such as a CAD system or office product, the minimum requirements of the respective system manufacturer must also be observed.
- If you want to use an integrated viewer, the hardware requirements of respective viewer manufacturer must be considered.
- Using the HiCAD 3D Viewer in HiCAD PDM (HiCAD Viewer and HELiOS before 2027) from Version 2024
  - During the HiCAD 3D installation (**"HiCAD 3D and HiCAD PDM"**, red installation dialogue), the Active X component of the HiCAD 3D Viewer is automatically installed. This enables the preview of HiCAD 3D files in HiCAD PDM.
  - On workstations on which only the HiCAD PDM Desktop (standalone) is installed, the HiCAD 3D Viewer must be installed separately from HELiOS 2024 and updated if necessary. This is also the case if only HiCAD PDM is updated when using an older HiCAD 3D version with HiCAD PDM. Otherwise, the preview of HiCAD 3D files cannot be displayed in HiCAD PDM. You will find the installation of the HiCAD 3D Viewer at Download > Download Area > Tools Download.
- Before starting a HiCAD PDM Client, you need a HiCAD PDM Database Server and an appropriately configured ODBC connection. Documents (in .pdf format) on installing the database system and importing and exporting the database can be found here.
- If a HELiOS application crashes, so- called dump files will be stored in the directory %LOCALAPPDATA%\ISD Software und Systeme\CrashDumps.

Compatibility Matrix for Interfaced Applications (HiCAD PDM)

Below you find a list of possible interfaces for HiCAD PDM:

	HiCAD PDM 2027	HELiOS 2026	HELiOS 2025
Operating system			
Windows 11, 64 Bit	✓	✓	✓
Windows 10, 64 Bit	✗	✗	✓
Windows 8.1, 64 Bit or older	✗	✗	✗
Server Operating system			
Windows Server 2025	✓	✓	✓
Windows Server 2022	✓	✓	✓
Windows Server 2019	✓	✓	✓
Windows Server 2016	✓	✓	✓
CAD system			
HiCAD 3D 2027	✓	✗	✗
HiCAD 2026	✗	✓	✗
HiCAD 2025	✗	✗	✓
HiCAD 2024 or older	✗	✗	✗
AutoCAD (Mechanical) 2027	✓	✗	✗
AutoCAD (Mechanical) 2026*	✓ AutoCAD as of Update 2026.1.2	✓ AutoCAD up to Update 2026.1.1	✓ AutoCAD up to Update 2026.1.1, HELiOS as of version 30.1.2
AutoCAD (Mechanical) 2025*	✓ AutoCAD as of Update 2025.1.4	✓ AutoCAD up to Update 2025.1.3	✓ AutoCAD up to Update 2025.1.3
AutoCAD (Mechanical) 2024	✗	✓	✓
AutoCAD (Mechanical) 2023	✗	✓	✓
AutoCAD (Mechanical) 2022	✗	✗	✓
AutoCAD (Mechanical) 2021 or older	✗	✗	✗

	HiCAD PDM 2027	HELiOS 2026	HELiOS 2025
Inventor 2027	✓	✓ HELiOS as of version 31.2	✓ HELiOS as of version 30.2.7
Inventor 2026*	✓ Inventor as of SP4	✓ Inventor up to SP3	✓ Inventor up to SP3, HELiOS as of version 30.1.2
Inventor 2025*	✓ Inventor as of SP5	✓ Inventor up to SP4	✓ Inventor up to SP4
Inventor 2024	✗	✓	✓
Inventor 2023	✗	✓	✓
Inventor 2022	✗	✗	✓
Inventor 2021 or older	✗	✗	✗
CAE system			
EPLAN Electric P8 2026	✓	✓	✓ HELiOS as of version 30.2.4
EPLAN Electric P8 2025	✓	✓	✓ HELiOS as of version 30.0.1
EPLAN Electric P8 2024	✓	✓	✓
EPLAN Electric P8 2023	✓	✓	✓
EPLAN Electric P8 2022	✗	✓	✓
EPLAN Electric P8 2.9	✗	✗	✓
EPLAN Electric P8 2.8	✗	✗	✓
EPLAN Electric P8 2.7	✗	✗	✓
EPLAN Electric P8 2.6	✗	✗	✓
EPLAN Electric P8 2.5	✗	✗	✓
EPLAN Electric P8 2.4	✗	✗	✓
OFFICE			
Office 2024	✓	✓	✓ HELiOS as of version 30.2

	HiCAD PDM 2027	HELiOS 2026	HELiOS 2025
Office 2021	✓	✓	✓
Office 2019	✗	✗	✓
Office 2016	✗	✗	✓
Office 2013	✗	✗	✓
Office 2010 or older	✗	✗	✗

*** Note on AutoCAD and Inventor:** Newer updates of AutoCAD (as of 2025.1.4 and 2026.1.2 respectively) and Inventor (as of 2025 SP5 and 2026 SP4 respectively) require .NET 10. These updates can only be used with HiCAD PDM 2027, not with HELiOS 2025 or 2026. If you are still using HELiOS 2025 or 2026, install these updates only when you switch to HiCAD PDM 2027.

The ✗ symbol for the operating systems does not always mean that the respective product is not compatible. It can also mean that interactions have not been sufficiently tested by the ISD yet.

System Requirements for the HiCAD PDM Internet Server

For the HiCAD PDM Internet Server, similar system and hardware requirements as for the HiCAD PDM Desktop apply:

	HiCAD PDM 2027	HELiOS 2026	HELiOS 2025
Processor (CPU)	64 Bit processor		
Main memory	Minimum: 4 GB RAM + 1 GB per simultaneous user (i.e. user working on the Internet Server at the same time as others)		
Hard disk	Additionally at least 2 GB free hard disk memory		
Operating system	Microsoft Windows 11 or Microsoft Windows Server 2016 or higher		
Others	It makes sense to install a HiCAD PDM client so that you can configure the HiCAD PDM Internet Server. Please note that the HiCAD PDM Client and the HiCAD PDM Internet Server require different licenses. The IIS Rewrite module from https://www.iis.net/downloads/microsoft/url-rewrite must be installed. Operation via SSL (https) requires valid certificates for the corresponding HiCAD PDM Internet Server websites.		

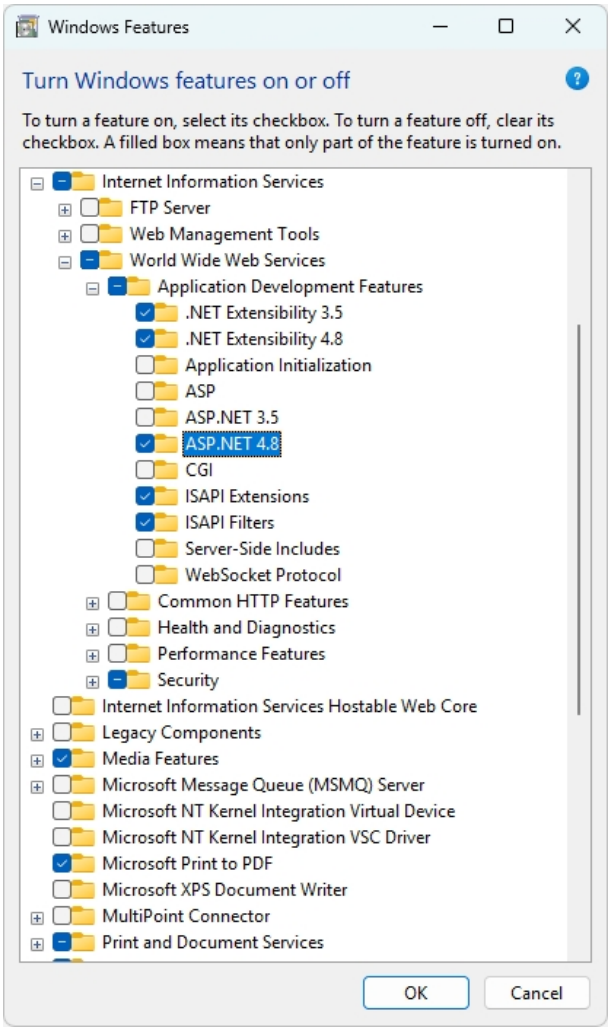
The Microsoft Internet Information Server (IIS), at least version 10.0 with ASP.NET 4.8 support, is also required.This is an integral part of Windows, but must be installed/activated separately before installing the HiCAD PDM Internet Server.

The IIS Rewrite module from https://www.iis.net/downloads/microsoft/url-rewrite must be installed.

Proceed as follows:

Choose **Control Panel > Programs and Features** and, at the top left of the window, select **Turn Windows features on or off**.

In the **Windows Features** dialogue window, blow Internet Information Services, expand the areas **Web Management Tools**, **World Wide Web Services > Application Development Features** and **Common HTTP Features**, and activate the checkboxes as shown below:



Please note:

- To operate the HiCAD PDM Internet Server, a number of website configurations in the Internet Information Server (IIS) are required. Parallel operation with other websites/products on the IIS is not recommended.
- The HiCAD PDM Internet Server supports the browsers Google Chrome, Firefox, Microsoft Edge and Android. The use of the HiCAD PDM Internet Server in iOS / Safari has not yet been conclusively tested and approved by the ISD.

System Requirements for the Job Server

The minimum requirements for the Job Server are as follows:

	HiCAD PDM 2027	HELiOS 2026	HELiOS 2025
Processor (CPU)	64 Bit processor		
Main memory	Additionally at least 4 GB main memory. The main memory should be dimensioned at least as large as the main memory of the client systems used. This ensures that all data to be processed by the Job Server (which is transmitted from the client systems to the Job Server) can be processed successfully.		
Hard disk	Additionally at least 4 GB free hard disk memory		
Operating system	Microsoft Windows 11 or Microsoft Windows Server 2016 or higher		

Please note:

- The Job Server requires corresponding locally installed CAD, E-Tech or Office applications to execute the plot or conversion jobs. Please consider that you need appropriate licenses for the operation of these applications and that the hardware requirements of the respective system provider must be taken into account accordingly.
- If you process AutoCAD and/or Inventor files with the Job Server, please note—in addition to the system requirements for each application—that AutoCAD and Inventor products do not support server operating systems (such as Microsoft Windows Server).
- The applications used by the Job Server to process print and conversion jobs must be exclusively available to the Job Server and must not be used by other applications or HiCAD PDM installations used simultaneously. Otherwise, unexpected behavior may occur during job processing.
- In addition to the client operating systems for Windows, the above-mentioned server operating systems can also be used. Whether a server operating system must be used depends on the license conditions for the Microsoft operating system you are using. The number of permitted simultaneous device connections is decisive here. Windows 11 allows 20 simultaneous logins to the operating system. In this case, you must ensure that, in addition to the existing logins, there are sufficient free logins left that can be used by the respective Clients.

System Requirements for the License Server

The minimum requirement for running a license server is as follows:

	HiCAD PDM 2027	HELiOS 2026	HELiOS 2025
Processor (CPU)	64 Bit processor. Recommended: 2 GHz Processor		
Main memory	Additionally at least 1 GB main memory		
Hard disk	Additionally at least 2 GB free hard disk memory		
Operating system	Microsoft Windows 11 or Microsoft Windows Server 2016 or higher		

We use the Software Sentinel RMS© from Thales© for licensing.

Please note:

- The license server need not be installed on a separate server or server operating system.
- A static IP address is required for the correct operation of a license server. When using a virtual server, a static MAC address is required.
  The use of a cloud server is only possible if changes to the underlying hardware can be excluded by the cloud provider. This also includes that the provider does not move the virtual server to another physical machine.
- The license server must not be installed on the same computer as an ISD product (e.g. HiCAD 3D, HiCAD PDM, etc.), as both products share system information for licensing purposes.
- Internet access is needed for the license server due to activation and deactivation.
- A Windows Server Core installation is not supported.

Operation in Virtual Environments

HiCAD PDM Client

Generally, the HiCAD PDM Client can be operated on Virtual Machines (VM). If you use integrated viewers, the hardware requirements of the respective viewer manufacturer must be considered.

The HiCAD PDM Client can also be used as a terminal application.

Job Server

Generally, the Job Server can be operated on Virtual Machines (VM). However, limitations may occur with regard to simultaneously installed CAD system, electrical engineering software or Office applications.

With regard to graphics functionality, performance and integration of printers, too, limitations may occur in virtual environments.

License Server

The license management system based on Sentinel RMS© by the company Thales© can, generally, also be used in virtual environments.

The use of a cloud server is only possible if changes to the underlying hardware can be excluded by the cloud provider. This also includes that the provider does not move the virtual server to another physical machine.

Network licenses on Virtual Machines (VM)

If you want to use/activate/deactivate the network licenses on virtual machines, please observe the following points:

- A static MAC address is required
- A static IP address is recommended or required when using Commuter Licenses
- Before copying or changing a virtual machine, deactivate the network licenses, since the UUID (Universal Unique IDentifier) of the VM will change due to the copying process, and cannot be deactivated afterwards any more. This also applies to the starting of the VM on a different host.

Further Requirements for Installation

- **Microsoft .NET Framework** and **Visual C++ Runtime Libraries** need to be installed on the computer before HiCAD PDM can be used; these packages will be installed as part of the HiCAD PDM installation if required.
- To be able to work with HiCAD PDM, a database system must be available that has been prepared for HiCAD PDM. For this you require
  - A Microsoft SQL Database Management system on your Server,
  - A HiCAD PDM database imported with the **HiCAD PDM Database Import & Export** tool, and
  - An ODBC connection on the Clients.

Documents (in .pdf format) describing the installation procedure for the database system and the import and export of the database can be found here.

Installation

The installation medium (e.g. ISO file from the Download area) contains the installation files for:

- HiCAD PDM Database Import & Export (required when creating a HiCAD PDM database for the first time, and for importing or exporting an existing database)
- HiCAD PDM Vault Server
- HiCAD PDM Desktop
- Activate Database Connection (HiCAD PDM Setup)
- HiCAD PDM Internet Server
- HiCAD PDM Job Server
- HiCAD PDM Mail Proxy
- HiCAD PDM Text Search Server
- HiCAD PDM Server Monitor
- HiCAD PDM Task Starter
- HiCAD PDM EPLAN Article Synchronisation Service
- Postscript printer driver (required for the output of multiple views in a PDF file)
- You can find detailed information on installation in the following documents:
  - Firewall Configuration License
  - Data Protection and Data Management
  - IT-Security Requirements

Important note on the scope of installed modules!

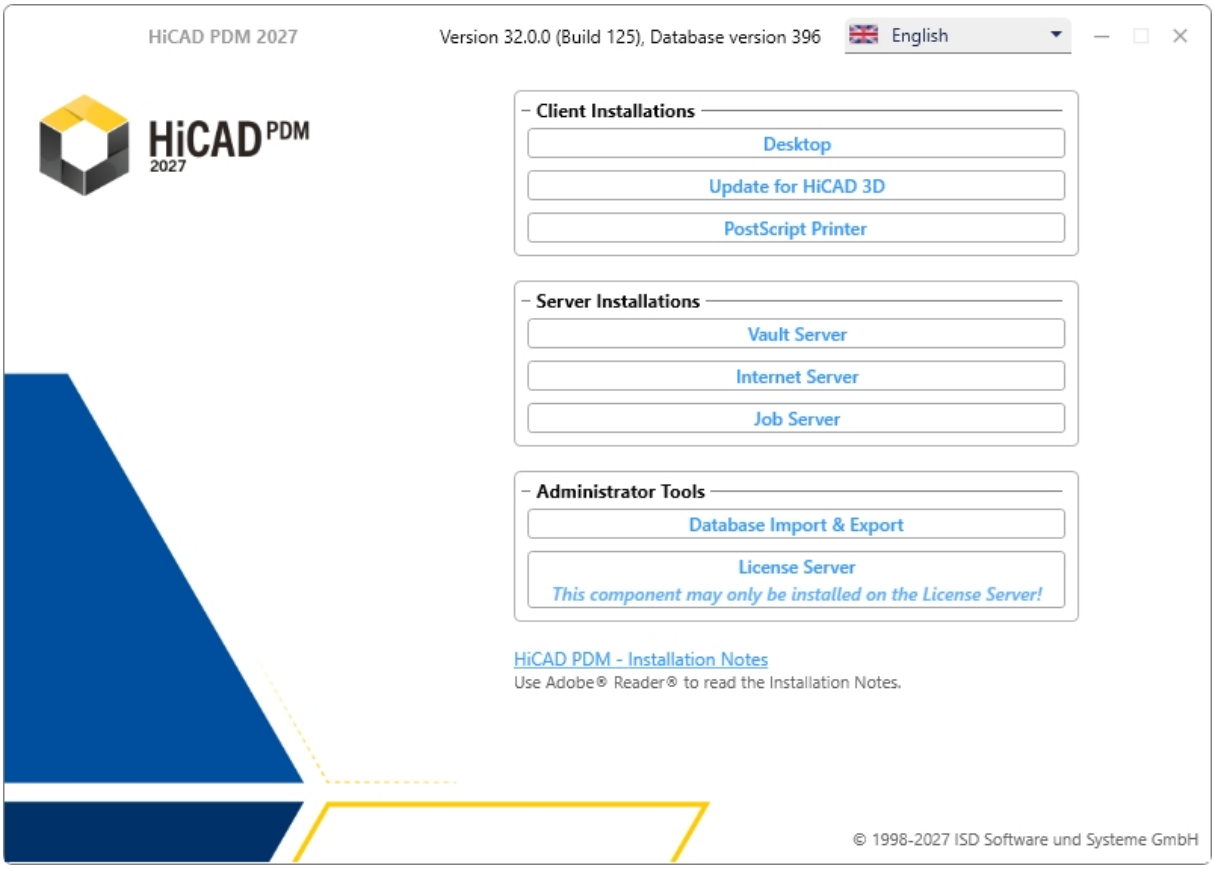
The scope of modules that will be installed depends on the product that was purchased. This means that not all modules described in the installation manual may be included in your software version.

It is mandatory for the installation of HiCAD 3D to start the **setup.exe** file from the root directory of the ISO file; only in this way it is ensured that the version will recognize the operating system, and that the matching HiCAD PDM version will be installed.

Please note:

- You can conveniently download the current HiCAD PDM version in the Download Area.

After running the **setup.exe** file, the following dialogue will be displayed:



The language has to be set to match the operating system. If HiCAD PDM does not support the language, the installation will be carried out in English. However, you can also select another supported language. The selection mask is left open, so that you can select the desired components one after the other.

Discontinuation of Windows® 10

Microsoft® has discontinued support for the Windows® 10 operating system in October 2025. For compatibility reasons, HiCAD 2025 SP2 and HELiOS 2025 SP2 were the last versions of our CAD or PDM system to support Windows© 10. HiCAD 2026 and HELiOS 2026 no longer run under Windows© 10.

Installing the Database Import & Export Tool

The HiCAD PDM modules (Document management, Part Management, Workflow etc.) are based on a relational database. Before you put HiCAD PDM into operation, the Microsoft SQL Server database administration system needs to be installed on the server, a HiCAD PDM database needs to be imported and a ODBC connection needs to be set up on the clients.

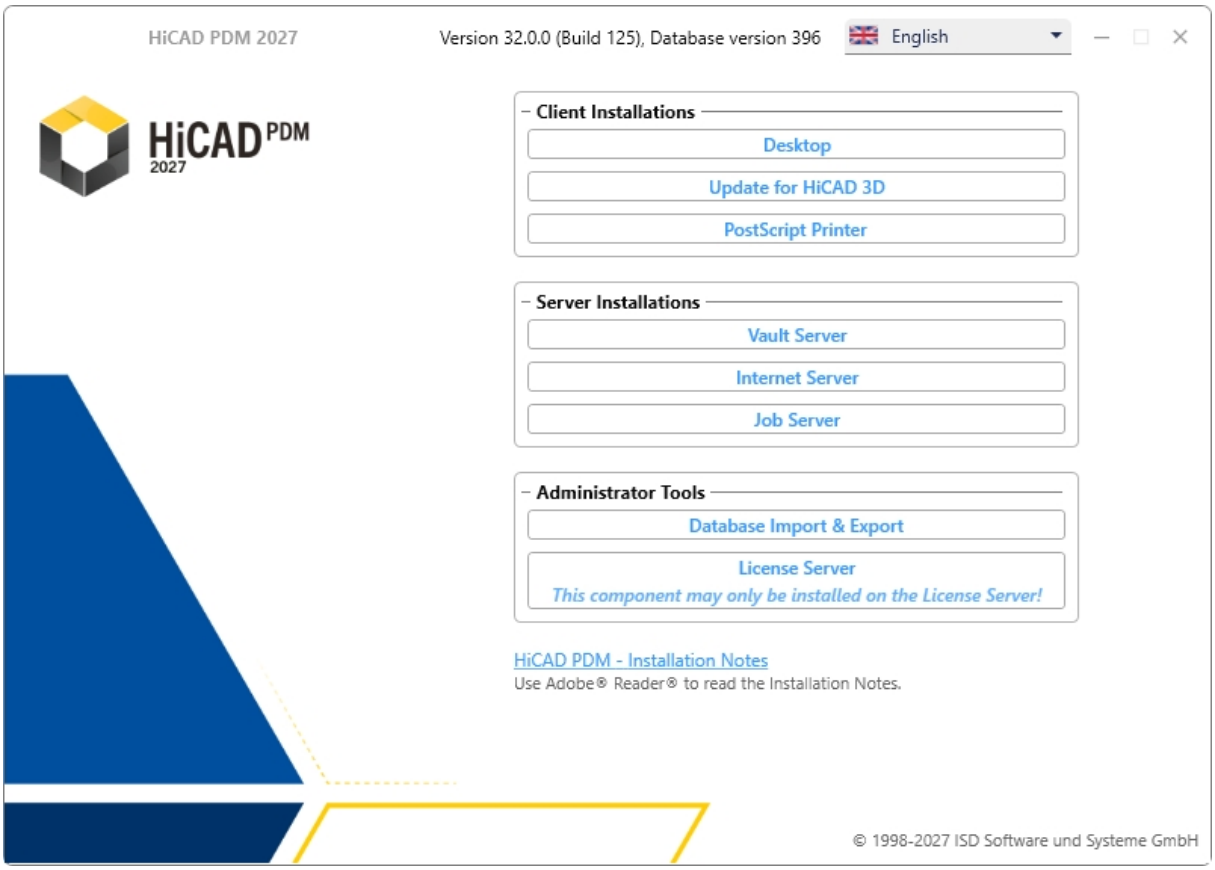
When you set up a HiCAD PDM database for the first time, the **Database Import & Export** tool (DbImportExport.exe) needs to be installed and executed on the database server first. The database and table structures will then be created, and filled with data records of the HiCAD PDM standard database.

An empty HiCAD PDM standard database is located in the **Databases** directory on the installation medium.

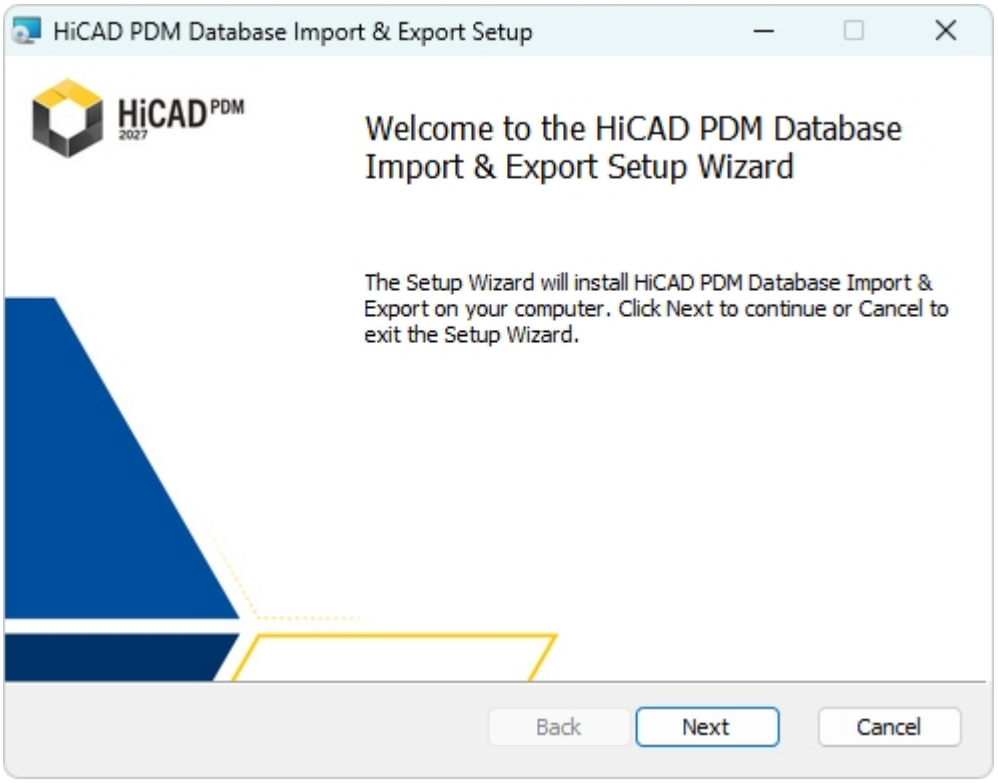
Please note:
Further information about the correct procedure for the execution of the Database Import & Export, as well as the previous and subsequent steps required for the setting up of a database server can be found in the user guide for the installation of the **Microsoft SQL Server**. You can find this document here. Please note that the semicolon must not be used as a special character in the password for connecting to the SQL Server.

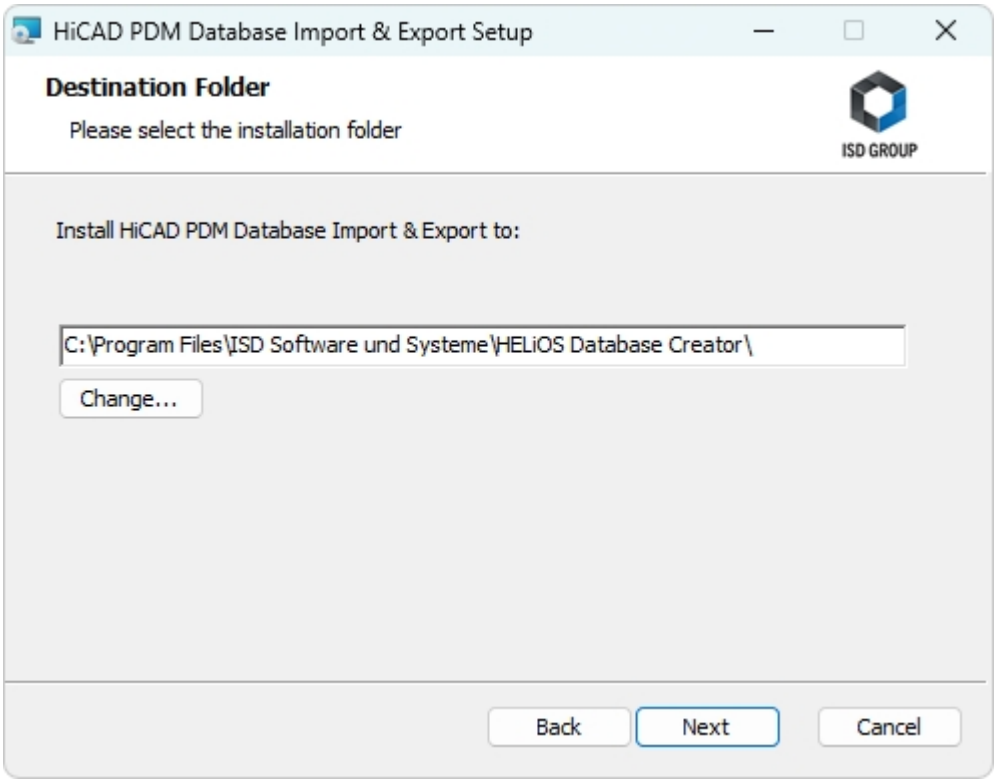
Start Windows to install the Database Import & Export tool. If Windows has already been started, close all other applications and start the installation wizard.

Leave this selection mask open, so that you can select the desired components one after the other.

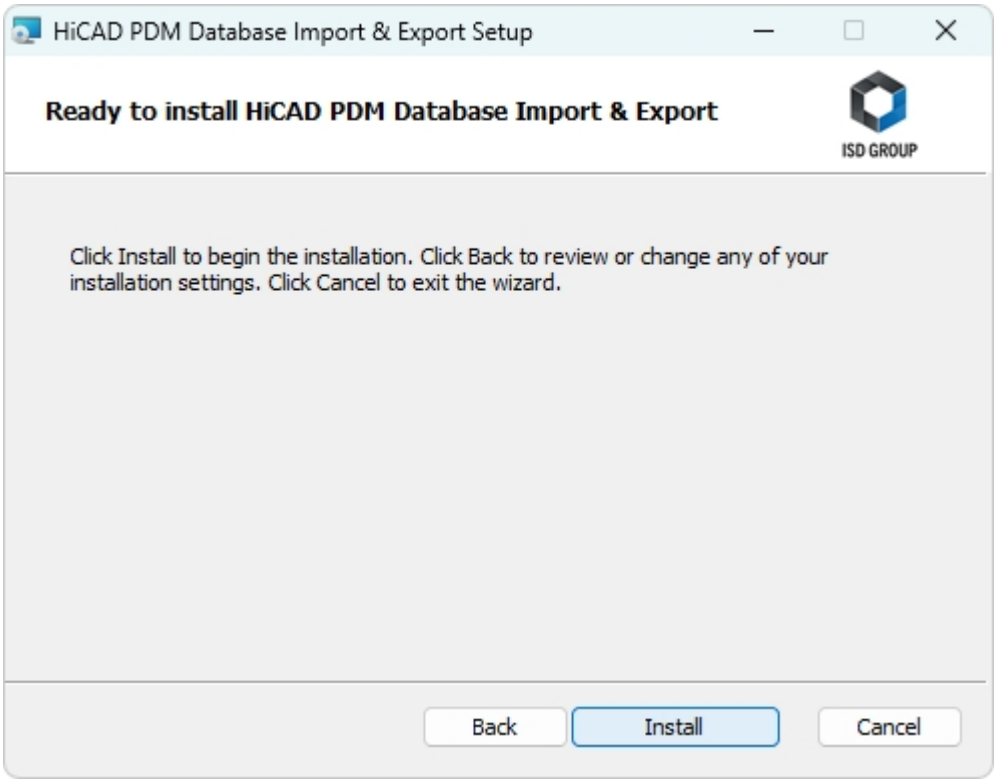


Click on the **Database Import & Export** button.

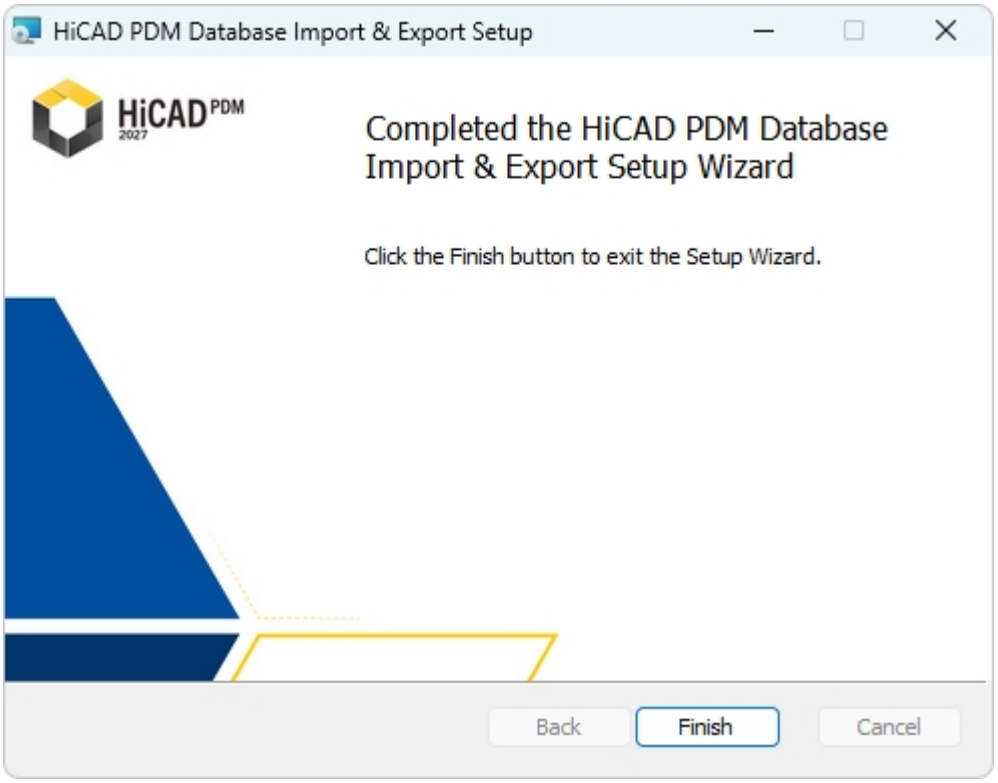




Select an installation directory for the **Database Import & Export** and click **Next**.



Click **Install** to start the installation.



Click **Finish** to complete the installation of the **Database Import & Export**. If desired, you can now install further components via the selection mask.

Please note:

There may be situations where you need to use the **Database Import & Export** tool from the command line. The command **DbImportExport.exe** --help displays all the available parameters.

Note on update installations

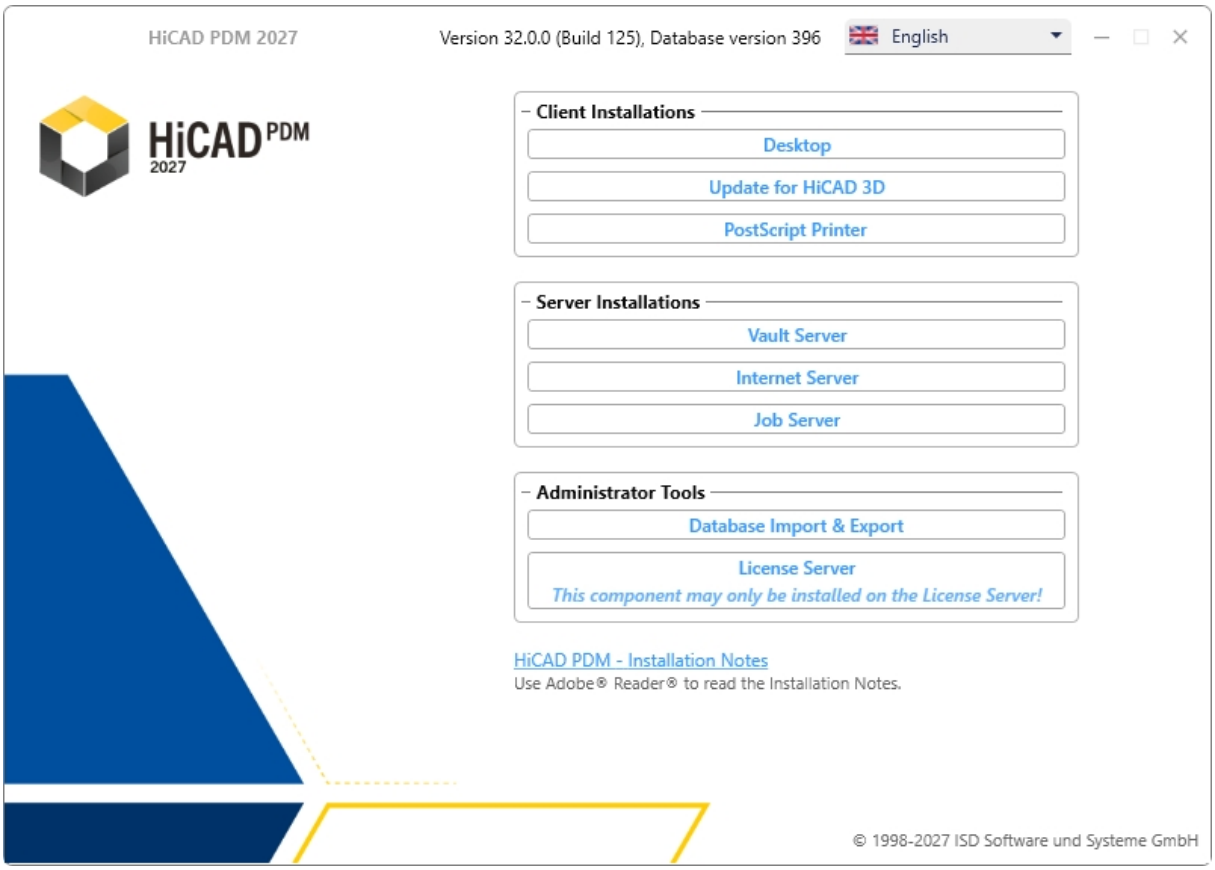
Some of the tools and components of HiCAD and HiCAD PDM that need to be installed separately are first uninstalled during updates and then reinstalled.

If errors occur or the installation is interrupted, the old version will be restored.

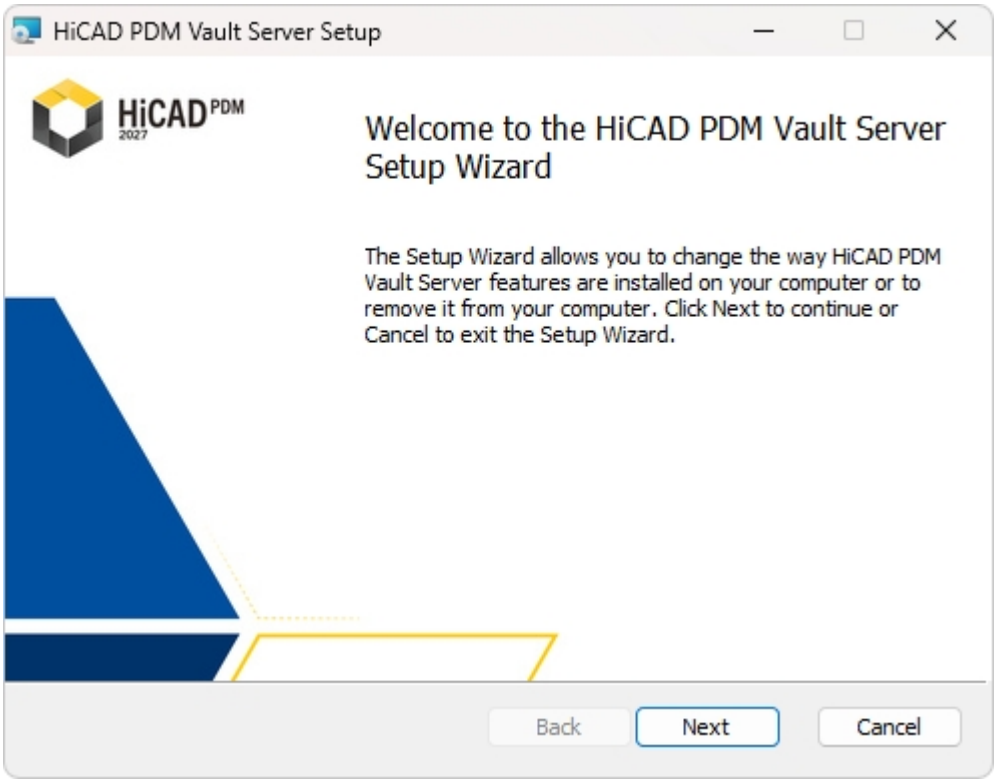
Installing the HiCAD PDM Vault Server

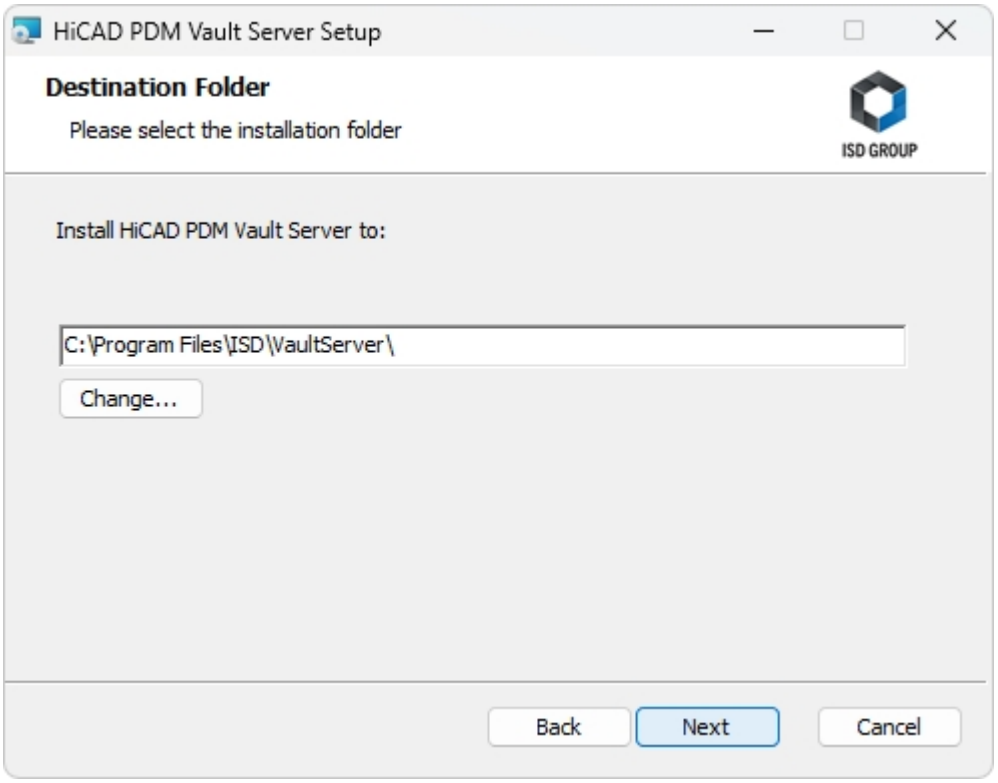
Please start Windows to install the HiCAD PDM Vault Server. If Windows is already open, end all other applications and start the Installation Wizard.

This screen remains open so that you can install the required components one after another.

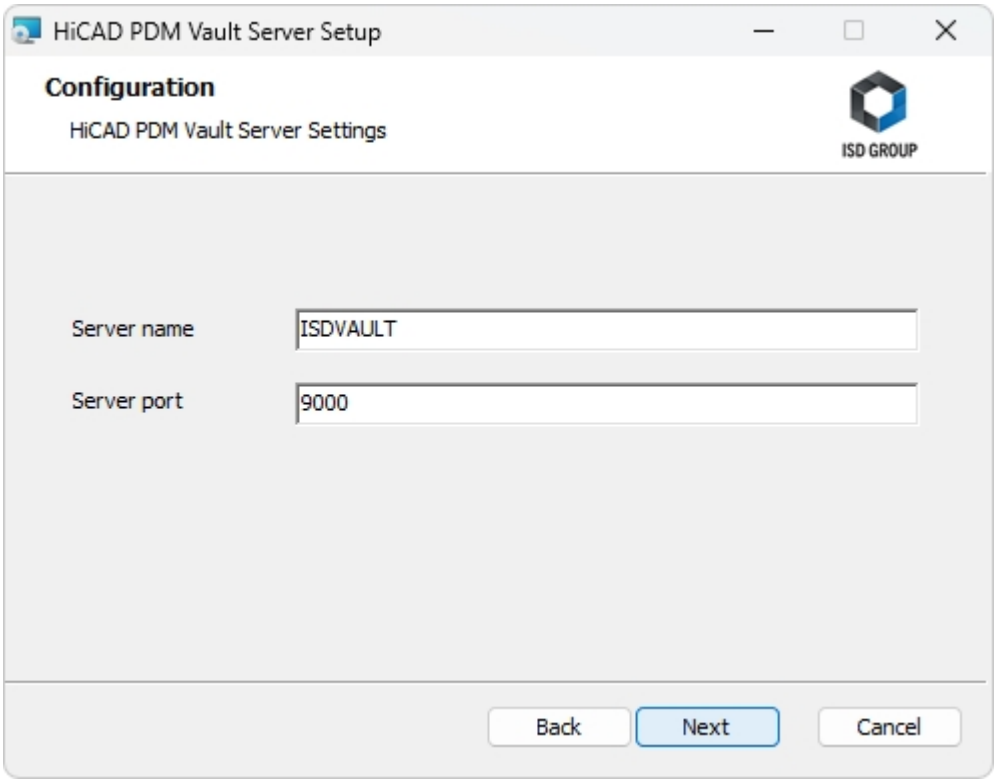


Click on the **Vault Server** button.

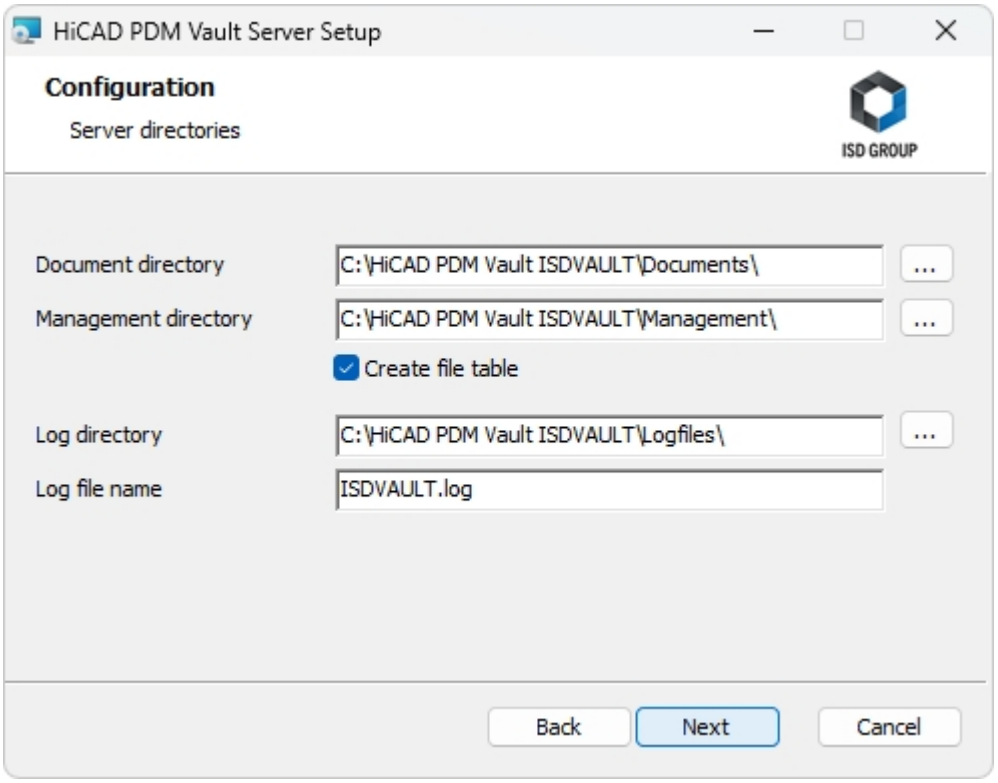




Enter the installation directory for the Vault Server. If the installation wizard finds an already installed version, it will be offered to you for updating.



Give the Vault Server a name, e.g. the name of your company, plus the location of your company. This name will be shown, for example, when you connect to the Vault Server from the Vault Client.

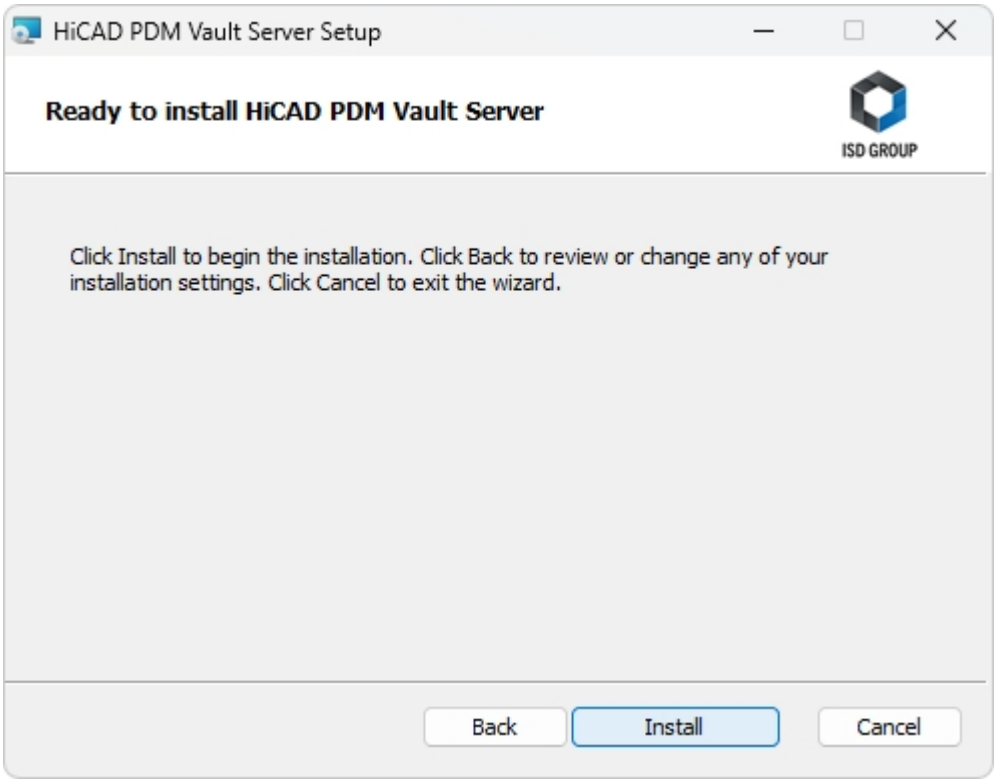


The Vault Server renames all documents that are managed in the database (e.g. SZA, DOC, XLS, ...) to *.VDF. These VDF files are saved to the Document directory.

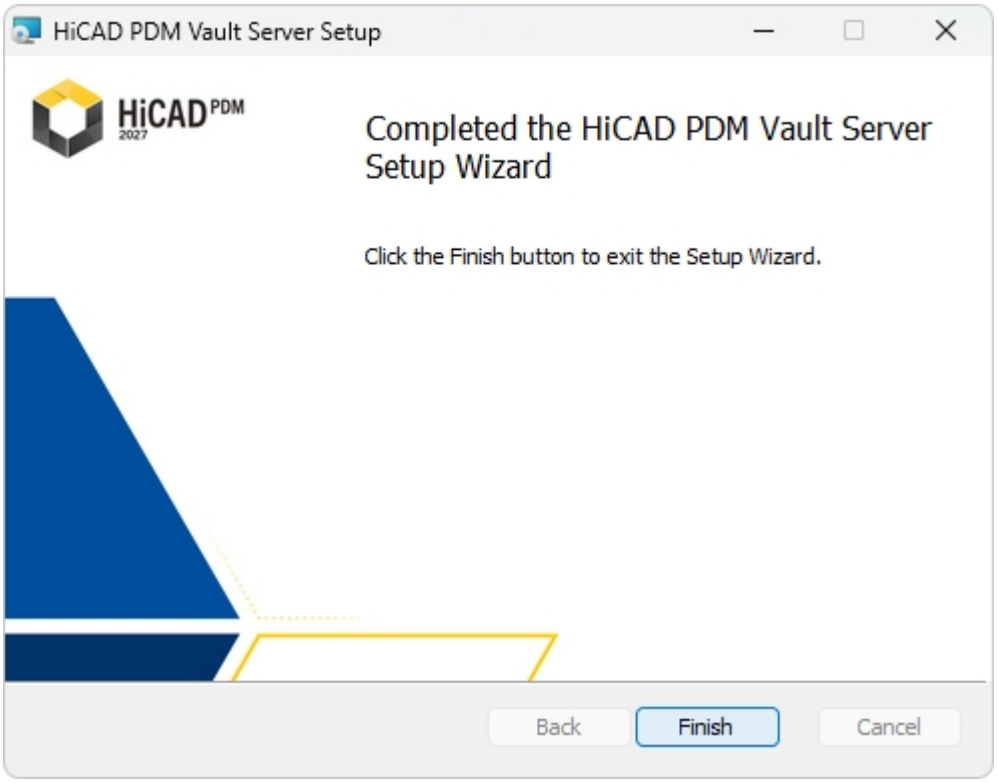
The files stored in the **Management directory** contain the assignments of the VDF file names to the “original file names”.

Log files (*.LOG) are saved to the **Log directory**. They record each access to the VDF files.

Enter the name of the log file in the **Log file name** field. The name of the **Vault Server** would also be possible here. If the log file exceeds a certain length, it will be cut down and suffixed by the current date.



Click **Install**.



Click **Finish** to complete the installation of the Vault Server. You can now install further components from the selection mask.

Please note:

The HiCAD PDM Vault Server Configuration (VaultServerConfig.exe) is used, amongst other things, to define which server is the central vault when multiple Vault Servers are in operation. When doing so, the hierarchy of one server as the central vault and all other Vault Servers as secondary sites must be maintained.

Please also read the notes on the HiCAD PDM Vault Server Configuration in the HiCAD PDM Online Help.

If the installation routine detects an "unclear" previous (manually performed) Vault installation in the system, you will receive a message stating that a new installation or update cannot be carried out. In this case, please contact ISD Consulting.

Note on update installations

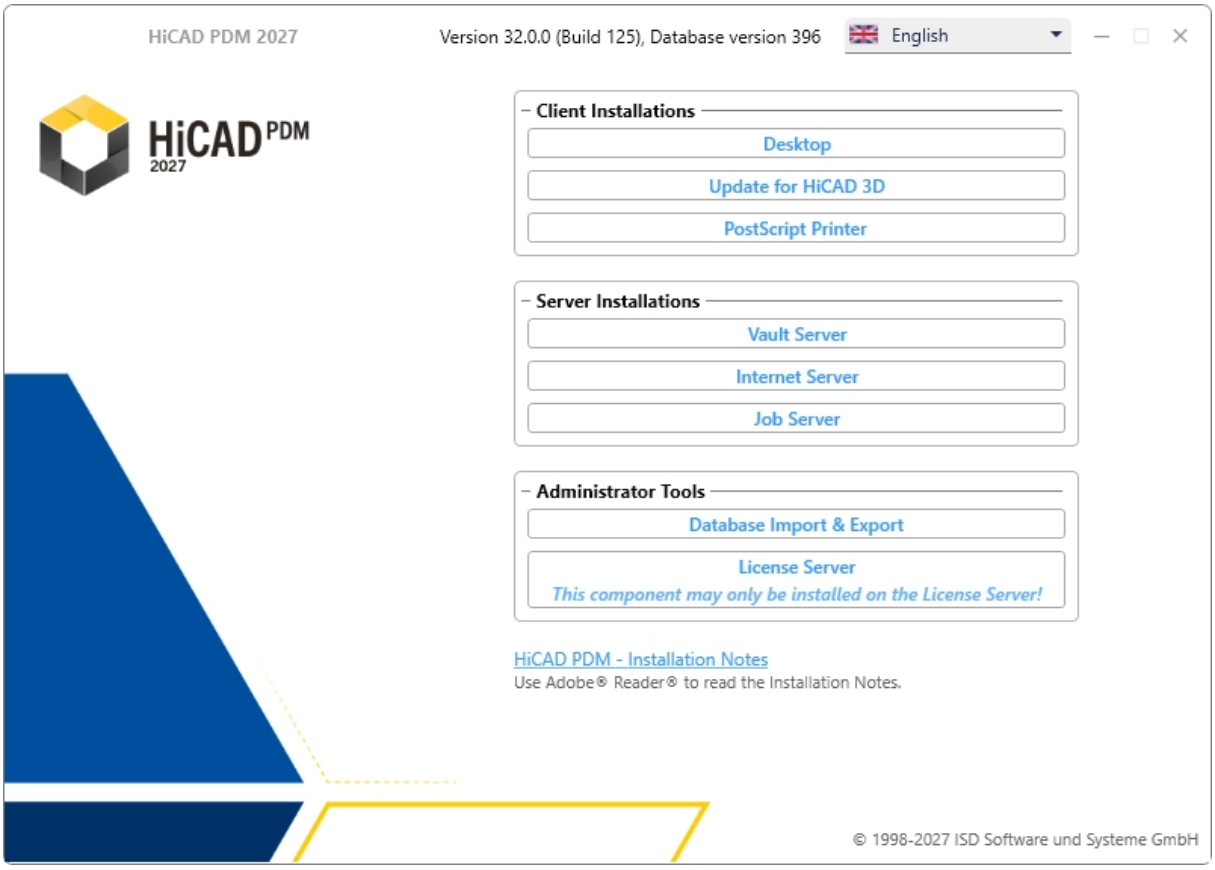
Some of the tools and components of HiCAD and HiCAD PDM that need to be installed separately are first uninstalled during updates and then reinstalled.

If errors occur or the installation is interrupted, the old version will be restored.

Installing the HiCAD PDM Desktop

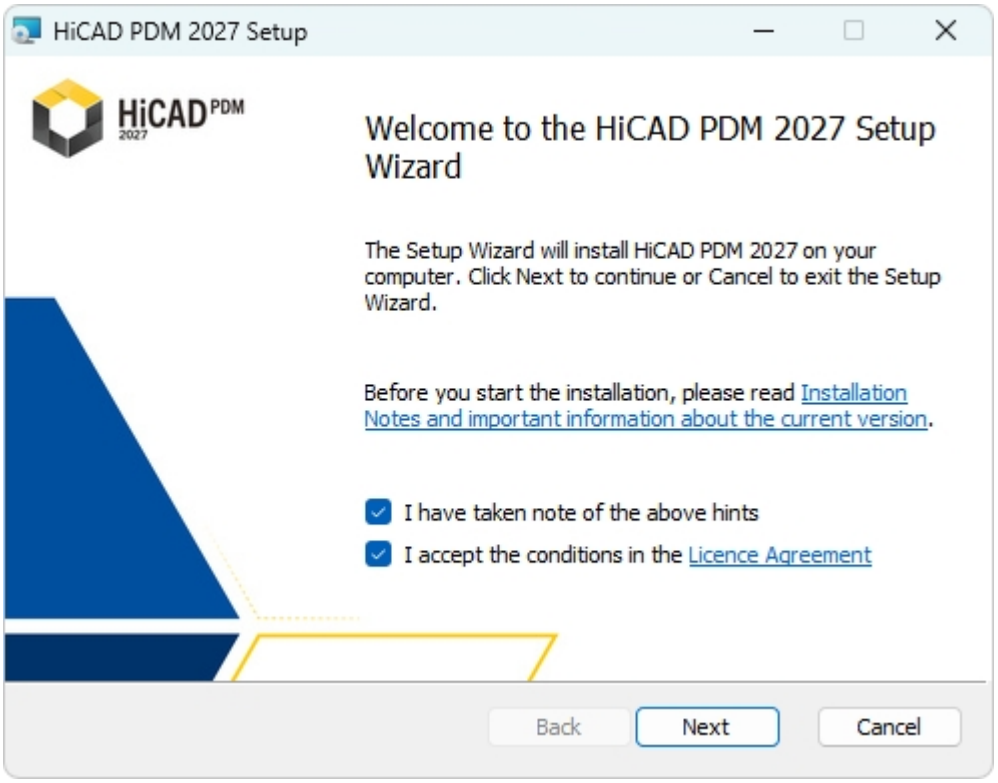
To install HiCAD PDM, start Windows. If Windows has already been started, close all other applications and start the installation wizard.

Then select the language for the installation. The language has to be set to match the operating system. If HiCAD PDM does not support the selected language, the installation will proceed in English. When you start the program, you can select the language in the login window. This setting will be saved for the next time you start the program.

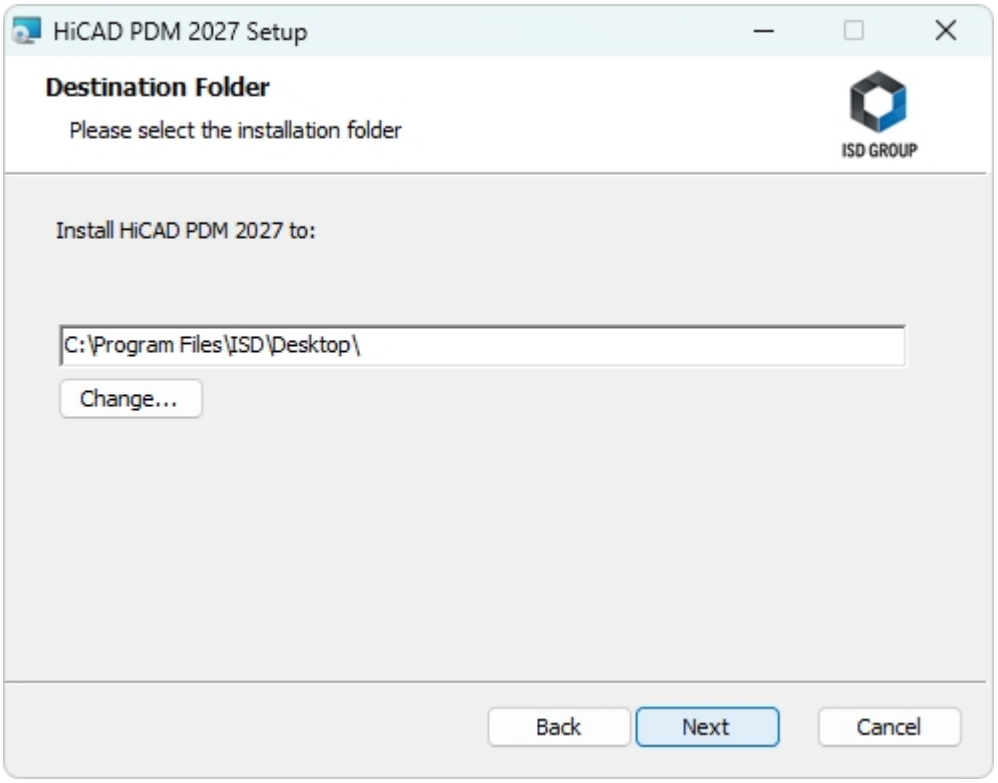


Click on the **HiCAD PDM Desktop** button to start the installation.

Before using HiCAD PDM, **Microsoft .NET Framework** and the **Visual C++ Runtime Libraries** must have been installed on the computer; these packages will be installed as part of the installation if required.



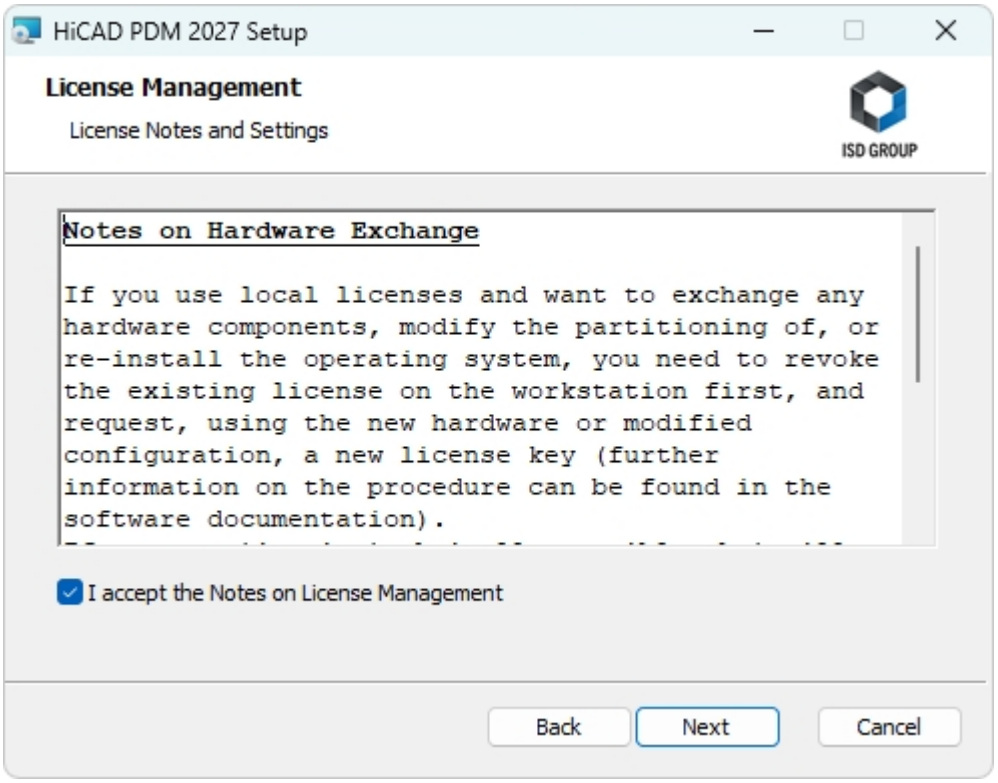
Please read the **Installation Notes** and the Licence Agreement carefully.



Select an installation directory. If the installation wizard finds an already installed version, it will be offered to you for updating.

In accordance with the current Microsoft guidelines, the HiCAD PDM documents will be saved to C:\Users\Public\Documents\HiCAD\ in case of a new installation. Only the Administrator has write permissions for the installation directory (C:\ProgramFiles\..).

If you work on several workstations without a Vault Server, you need to enter on each workstation the path of the document directory into the system file FILEGRUP.DAT. This means that the default path needs to be changed accordingly in all corresponding places of the FILEGRUP.DAT. The directory should be a shared network directory to which all Clients have access.



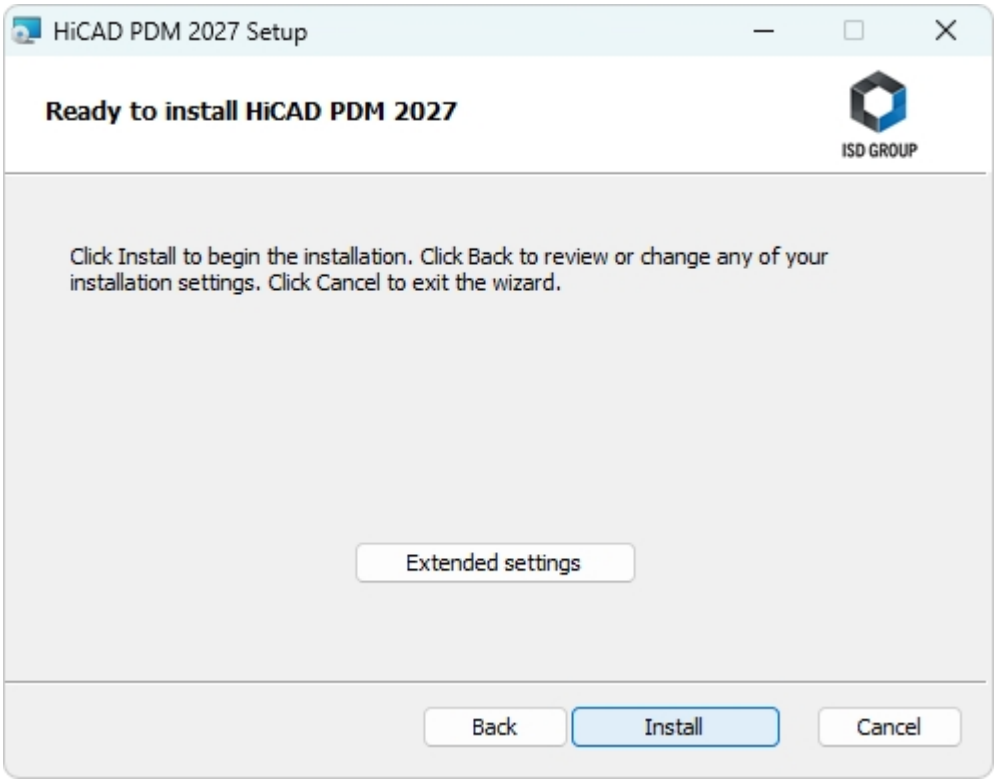
Please read the **Notes on Hardware Exchange** carefully.

Hardware Exchange

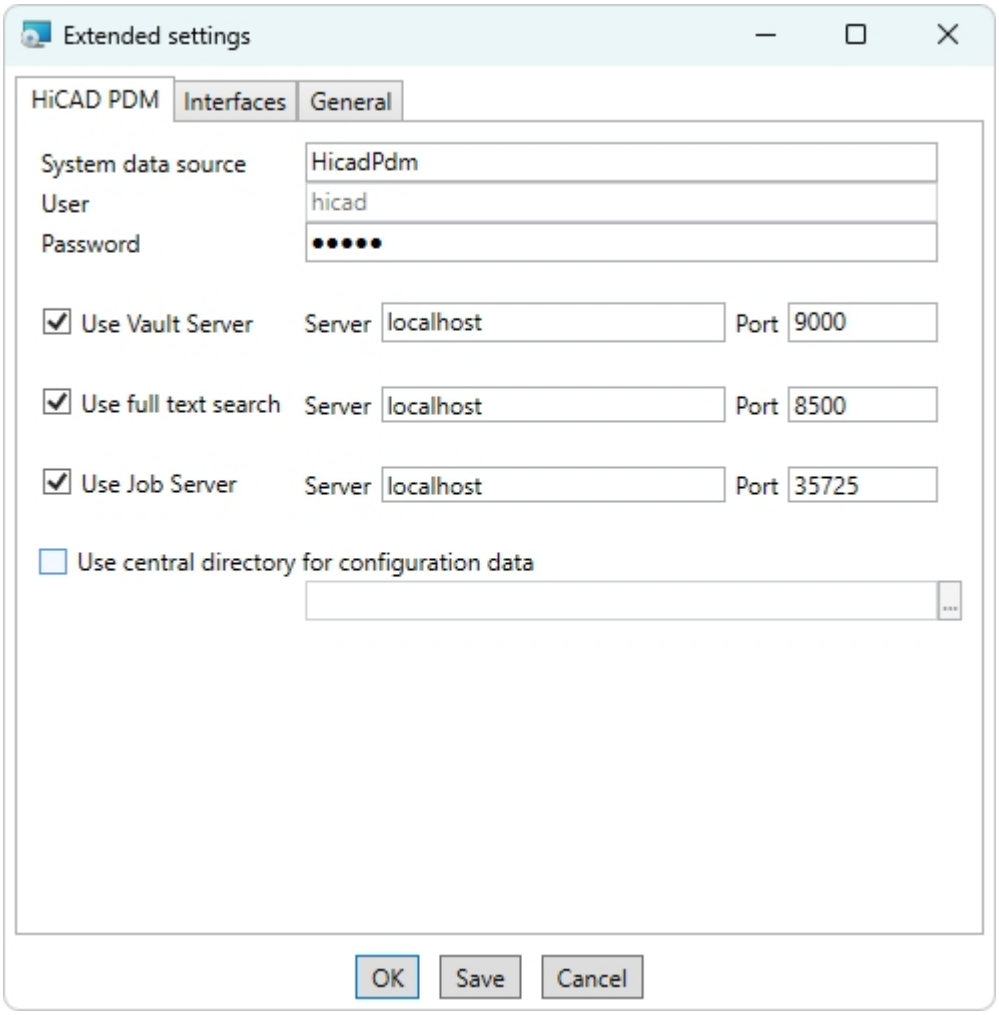
If you use local HiCAD PDM licenses and want to exchange any hardware components, modify the partitioning of, or re-install the operating system, you need to revoke the existing license on the HiCAD PDM workstation first, and request, using the new hardware or modified configuration, a new license key (further information on the procedure can be found in the software documentation).

If a revocation is technically possible, but will not be performed, the ISD reserves the right to charge costs in an appropriate amount for the reissuing of the license. If the license will not be revoked, or if such revocation is no longer technically possible, the ISD may request proof that the unrevoked license is no longer utilisable; in case of failure to produce such proof, the ISD reserves the right to refuse the transfer of the license to a new hardware.

Accept the notes to continue with the installation.



You can now start with the installation or modify the **Extended Settings** for HiCAD PDM.



In case of a new installation you can specify an arbitrary name for the system data source. In case of an update, the existing data source will be offered. User and Password will be identical with the ODBC login.

If you use a Vault Server, activate the **HiCAD PDM Vault Server** . Enter the name of the Server in the **Address** input field, and the Server Port of the Vault Server in the **Port** input field. You already entered both during the installation of the HiCAD PDM Vault Server. Connection details for a Vault Server installation that already exist in the system may be recognised by new or updated installations and set accordingly.

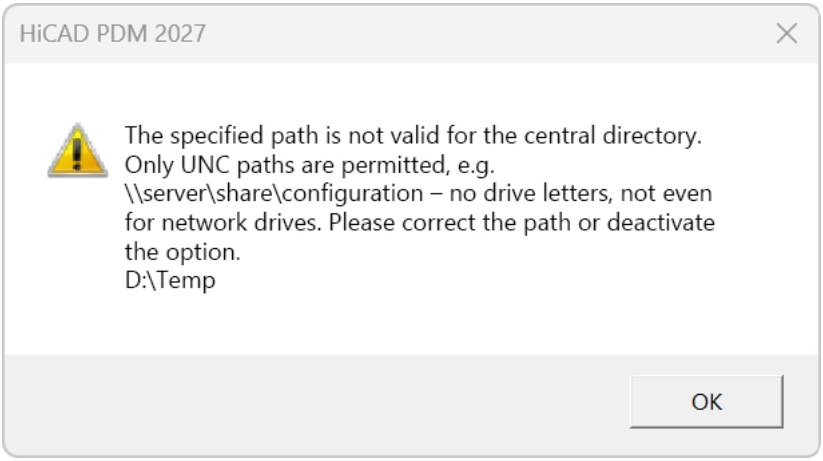
If you have not installed the HiCAD PDM Vault Server yet, you can do this now: Choose HiCAD PDM Options > Database > General > Vault Server ... and specify the connection. For activation you must then restart the HiCAD PDM Desktop.

If you want to process your print jobs via the Plotmanagement of the ISD, you need to install a **Print Client** on each workstation. Activate **Use Job Server**. In the Server field, enter the name of the computer on which you install the Job Server. The **Port** is used for communication between Client and Job Server as well as for monitoring via the Server Monitor. The Job Server collects the print jobs and processes them according to your settings.

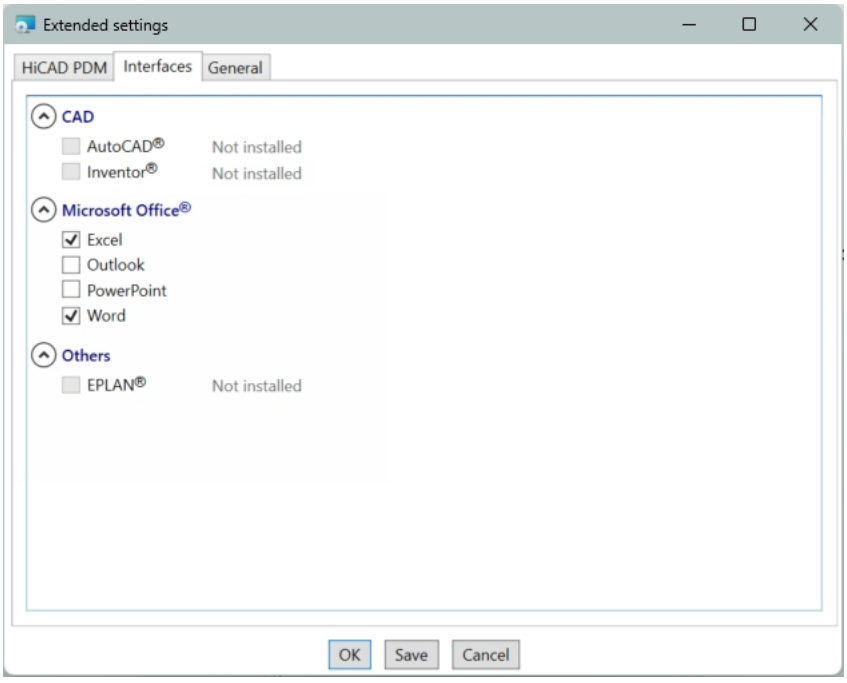
Individual settings of HiCAD PDM can be distributed to other users or workstations.To do this, create a ZIP file in the HiCAD PDM Client by clicking on the HiCAD PDM icon  and choosing **HiCAD PDM Options >** Manage... **> Export settings**. To load the settings on another workstation, select **HiCAD PDM Options > Manage... > Import settings**. You can then select the ZIP file and confirm with **Open**.

If you want to make the settings available to multiple workstations, activate the **Use central directory for configuration data** option during installation and then select a directory after clicking on the ... icon. Via **HiCAD PDM Options > Manage... > Save settings centrally**, you can save the current settings of your HiCAD PDM Desktop to the specified central directory and thus make them available to other workstations.

Please note that only UNC paths are allowed for the central configuration directory. If you specify a path that includes a drive letter (e.g., “D:\Temp\”), you will receive a corresponding error message:



Similarly, specifying "ProgramData" paths is not allowed. You may also receive a corresponding error message in this case.



The availability of interfaces with HiCAD PDM depends on the programs that are installed on your computer. You can only link 64-Bit versions to HiCAD PDM 64-Bit versions. Please note however that an additional, special ODBC connection will be required for old BOMs. In such cases, please contact the ISD Consulting team.

Multiple selections of HiCAD PDM Interfaces are also possible. The HiCAD PDM functions will be integrated in the programs that are linked to HiCAD PDM.

Please take a look at the Compatiblity Matrix.to check which interfaces to external software products are supported by HiCAD PDM.

When installing the CAD interface (AutoCAD, Inventor) the specific CAD configuration will be considered. The only thing you need to do is to copy the drawing frame template files from the corresponding ...\templates\ sub-directory.

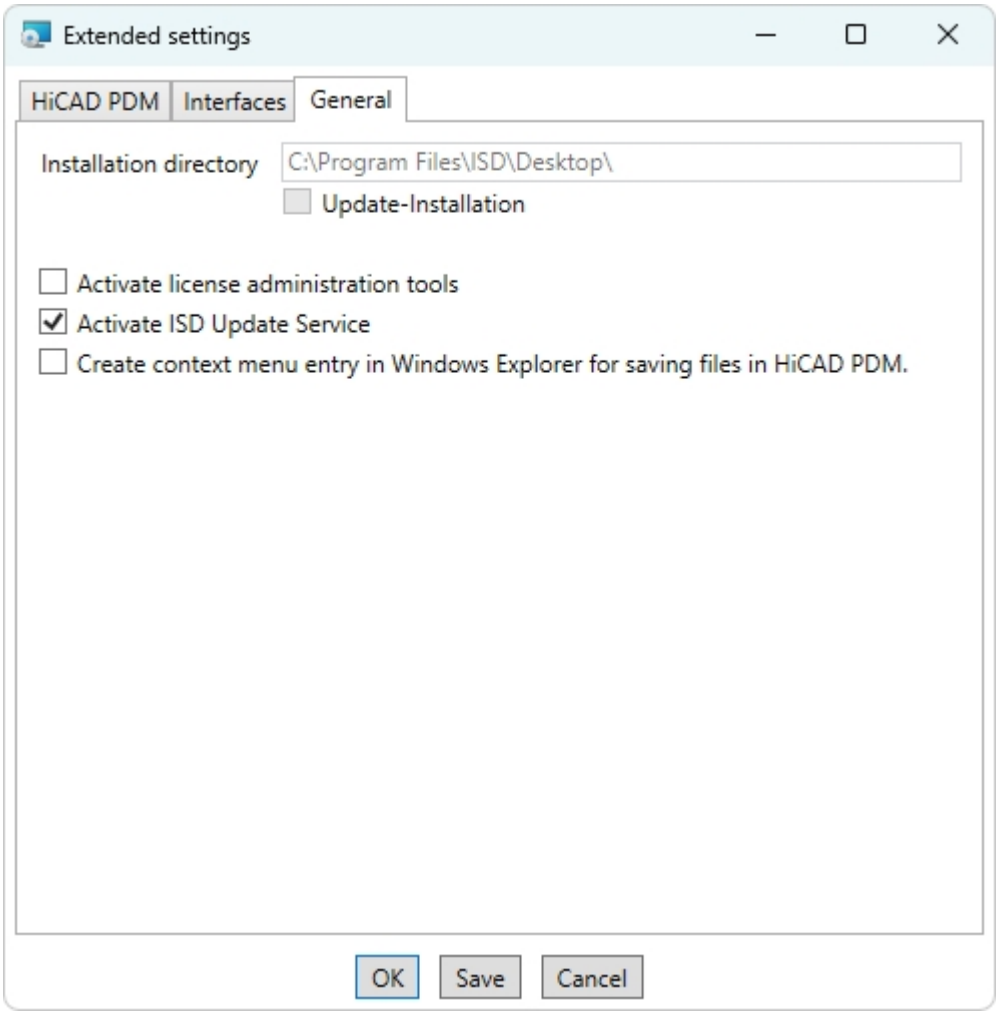
The installation automatically executes the configuration file MultiCAD.csv with the **PdmClientConfig.exe** tool. If you work with your own .csv file, you can execute it subsequently: Start the **PdmClientConfig.exe** tool from the \exe\ directory of your HiCAD PDM installation, click the  button to select the path of the file and confirm with **OK**.

Interfaces with foreign systems can also be added via the Windows Control Panel. Select **Start > Control Panel > Programs and Features**, activate **HiCAD PDM**, then right-click and select **Change**. This starts the installation of HiCAD PDM, enabling you to select further interfaces with foreign software products on the **HiCAD PDM Interfaces** tab.

Further information, e.g. how to activate specific interfaces in the foreign software, can be found in the HiCAD PDM Help.

Please note:

- A prerequisite for the interface with a foreign software is that his software must be installed on the same system.
- An interface between a 32-Bit software and a 64-Bit version of HiCAD PDM is not possible.
- For EPLAN you also require the EPLAN Article Synchronisation Service running separately on the system. You will find the corresponding button in the HiCAD PDM installation mask. For the configuration of the HiCAD PDM-EPLAN interface please contact the ISD Consulting team.
- If you have installed AutoCAD and AutoCAD Mechanical, both will be considered for the interface.



The **License administration tools** are required for the management of server licenses.

Please note:
If you are using server licences, select the **Activate licence administration** tools option when installing on the workstation (client). This will enable the **Server Monitor** (shows who is currently using which licences) and **Commuter Licence** (borrowing a licence, e.g. for a laptop) tabs in the client's ISD Licence Manager.

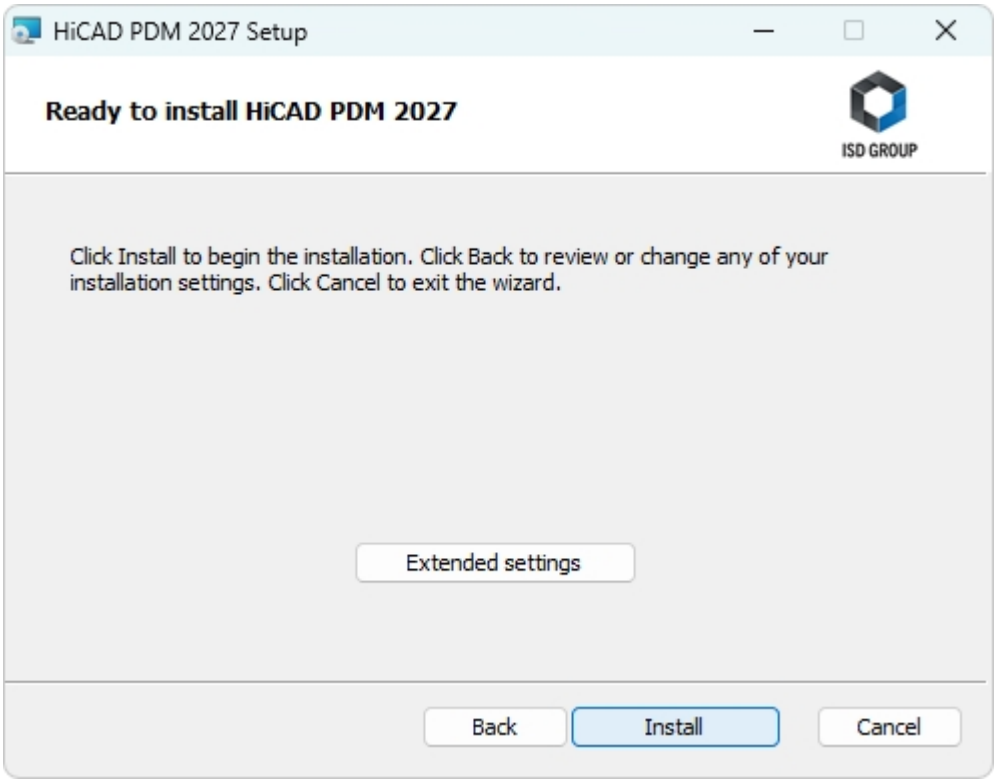
During the installation, you decide to search for a hotfix on the ISD Webserver when starting HiCAD PDM by activating the checkbox **Activate ISD Update Service**.

If you want the function **Save to HiCAD PDM** to appear in the context menu of Windows Explorer, activate the checkbox **Create context menu entry in Windows Explorer for saving files in HiCAD PDM**.

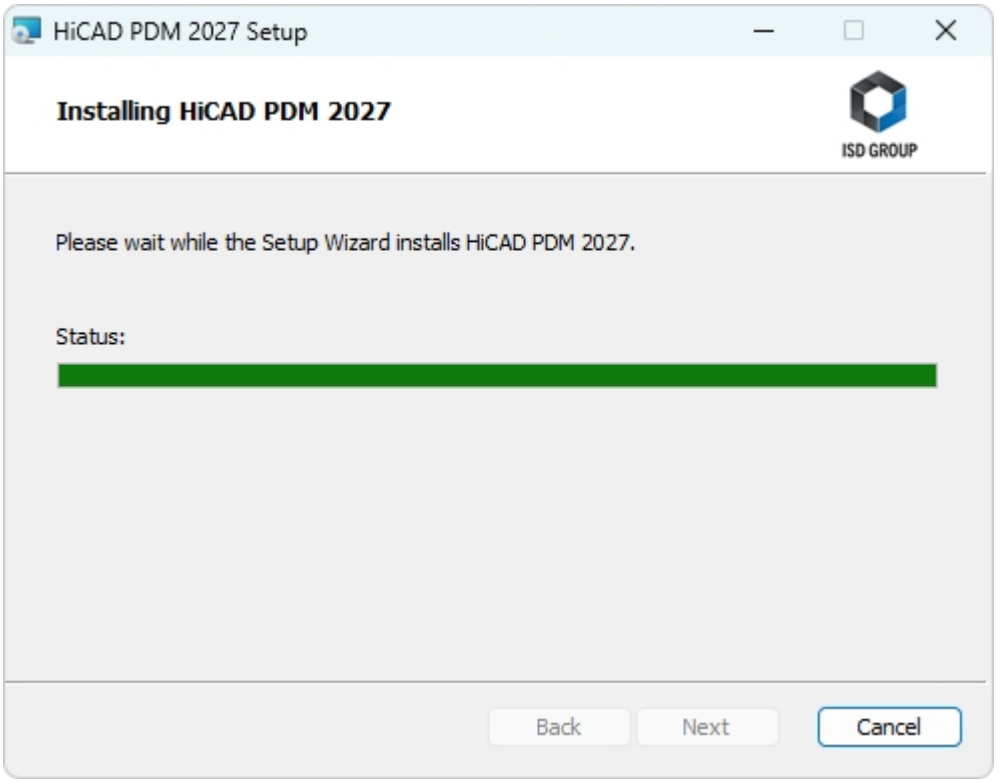
Please note the following: If several installations of HiCAD PDM (or HiCAD 3D) with the context menu function enabled are installed on a single system, uninstalling them or deselecting the function during a change installation may result in the other HiCAD version being "switched over" to this setting.

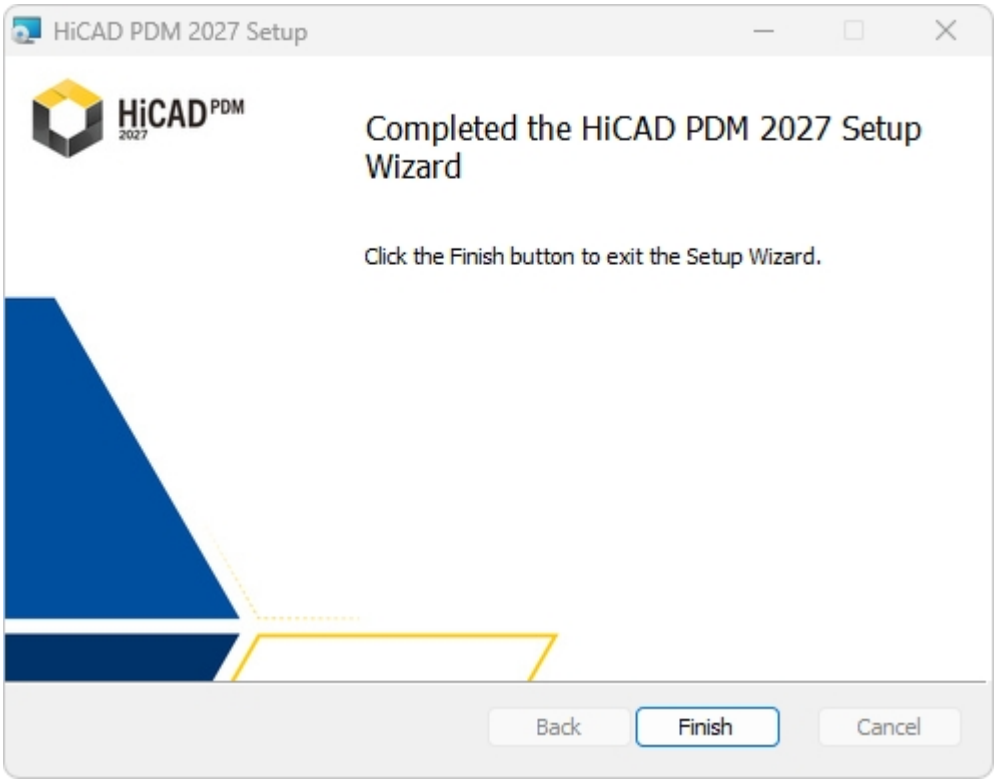
Click **Save** to save the **Extended Settings** to an **.ini file**. If you place the .ini file in the installation directory when installing server licenses, the settings will be applied.

Close the **Extended settings** dialogue with **OK**.



Click **Install**.





After successful installation, you will find the **HiCAD PDM** shortcut on the Desktop of your computer for program start.

Support with the Office Interface

Starting the Office interface with administrator rights

Note that the interface between HiCAD PDM and an Office application does not work if the corresponding Office application has been started via the Windows option **Run as administrator**, but HiCAD PDM has been started as a normal user. This is because Windows prevents communication between normally running applications and applications started as administrators.

If the add-in starts but is constantly disabled

In this case, there are likely conflicting entries in the registry. When the HiCAD PDM add-in is blocked by Office, Office stores the relevant information in the registry. This can also cause the add-in to behave differently depending on whether you start Office as an administrator or a standard user. In that case, delete all registry keys and their subentries that begin with “Pdm.” under the following paths, which are all located within ...\Addins\ or ...\AddinsData\:

- HKEY_CURRENT_USER\Software\Microsoft\Office\Outlook\
- HKEY_CURRENT_USER\Software\Microsoft\Office\Word\
- HKEY_CURRENT_USER\Software\Microsoft\Office\Excel\
- HKEY_CURRENT_USER\Software\Microsoft\Office\PowerPoint\

Then start **PdmCouplings.exe** as administrator and link the interface again.



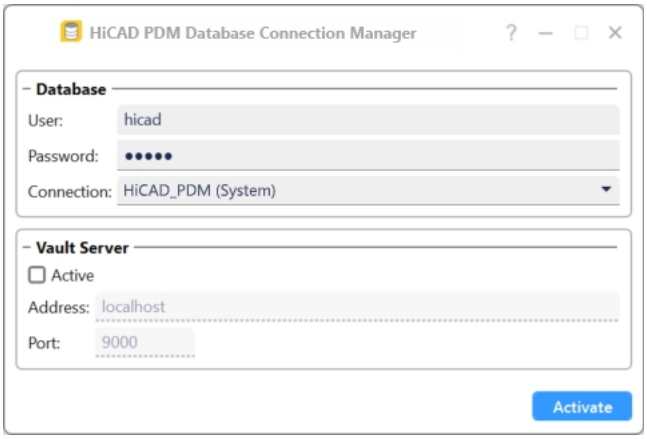
Important:

Changes to the registry should only be carried out by an administrator. In any case, the original files should be saved before making any changes!

Activate Database Connection and Vault Server (HiCAD PDM Database Connection Manager)

After installing HiCAD PDM, you may need to activate the database connection.

To do this, run the **PdmSetup.exe** application from the \exe\ directory of your HiCAD installation (Windows administrator rights are required).

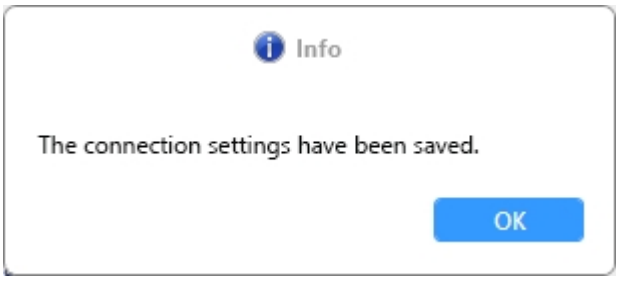


The **User** name and **Password** entered in the **Database** area of the dialogue window must match the SQL Server authentication settings configured for your database.

Select the required ODBC data source from the **Connection** drop-down menu. (The drop-down menu only displays ODBC data sources that have been entered into the system.)

Click on **Activate**.

If the database connection is established successfully, you will receive a confirmation message..



You can only tick the **Active** checkbox to enable the **Vault Server** in the section below once a connection to a valid HiCAD PDM database has been established.



If the **Address** and/or **Port**–which are displayed here as the defaults set during installation–change, you can update the corresponding configuration for the client here.

To enable the Vault Server, click **Activate** again.

Installing the HiCAD PDM Internet Servers

For the **HiCAD PDM Internet Server** you require the **Microsoft Internet Information Services**(IIS). This is part of Windows, but must be installed/activated separately before installing the HiCAD PDM Internet Server.

Certain MIME types are required to display PDF documents in an IIS environment. MIME types (Multipurpose Internet Mail Extensions) are standardised codes that specify the type of content (e.g. text, image, audio or video) being transmitted over the Internet. The following MIME types must be present for PDFs to be displayed or processed correctly:

File extension	MIME-type	Purpose
*.FTL	text/plain	Preview of PDF documents
*.MJS	text/javascript	Preview of PDF documents

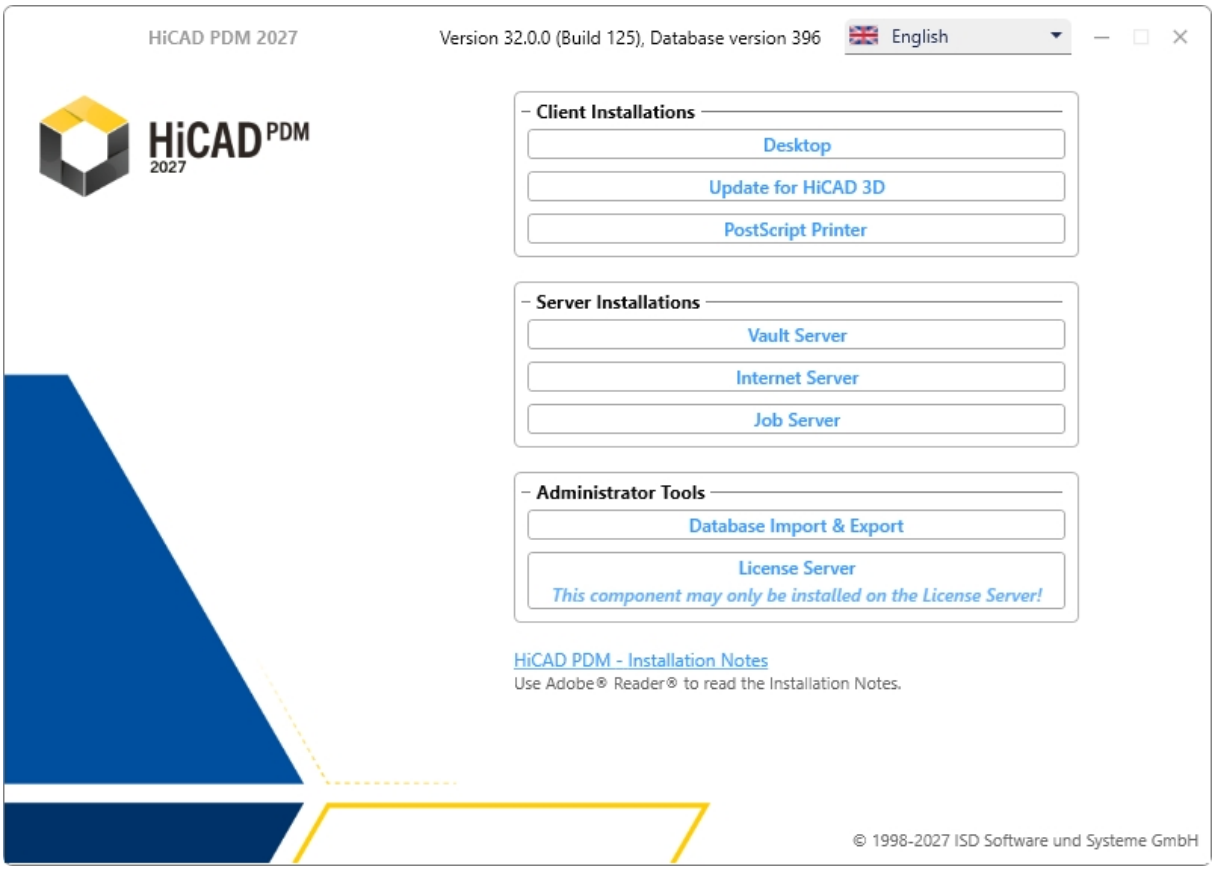
When installing or updating the HiCAD PDM Internet Server, the system automatically checks whether the required MIME types are already entered. If they are missing, the necessary MIME types are added so that PDFs can be displayed without any problems.

It is advisable to install a HiCAD PDM Client so that you can configure the HiCAD PDM Internet Server.

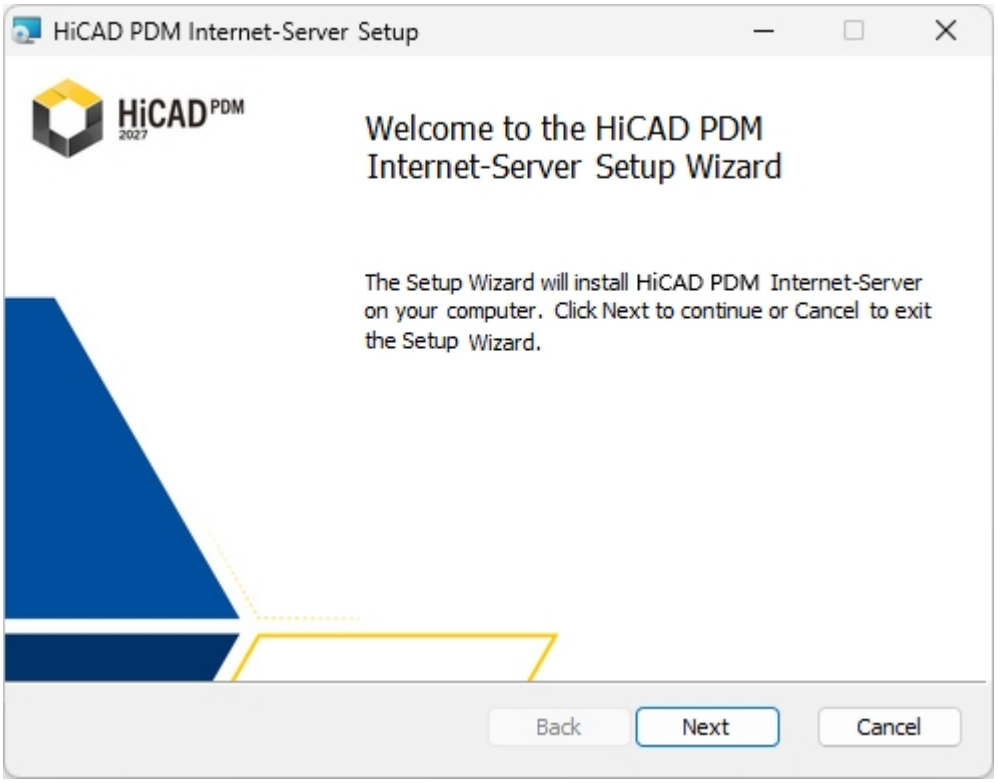
To install the HiCAD PDM Internet Server, close all other applications and start the installation wizard.

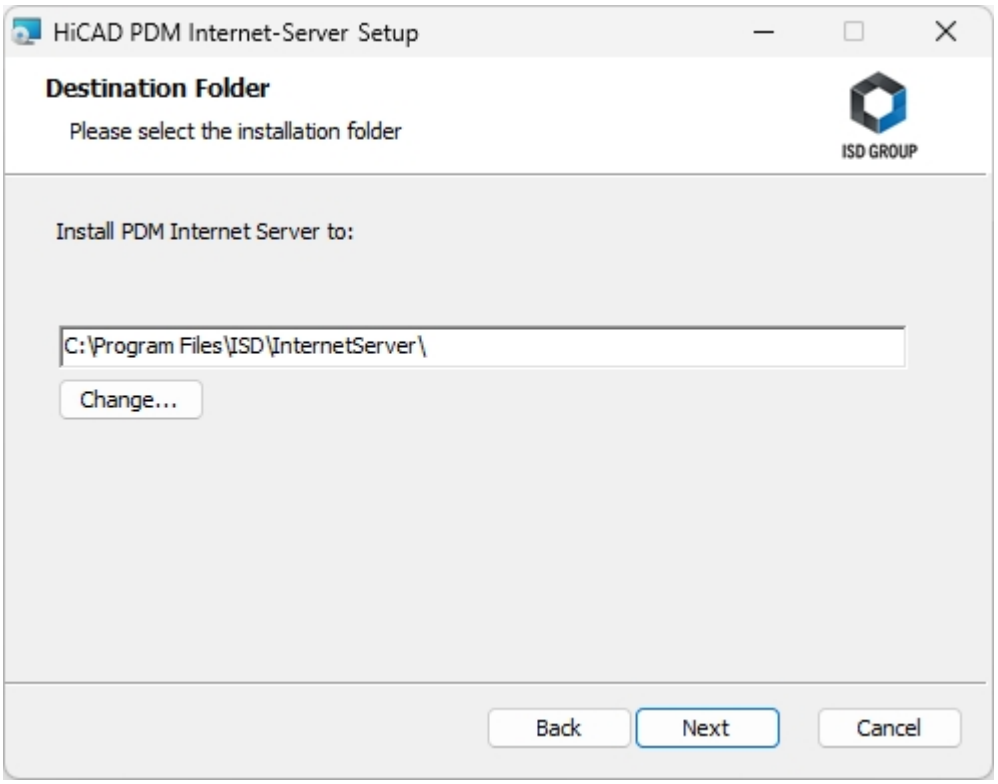
Select the button **Standard Edition**. The screen with the software components will then open.

This selection screen remains open so that you can install the required components one after the other.

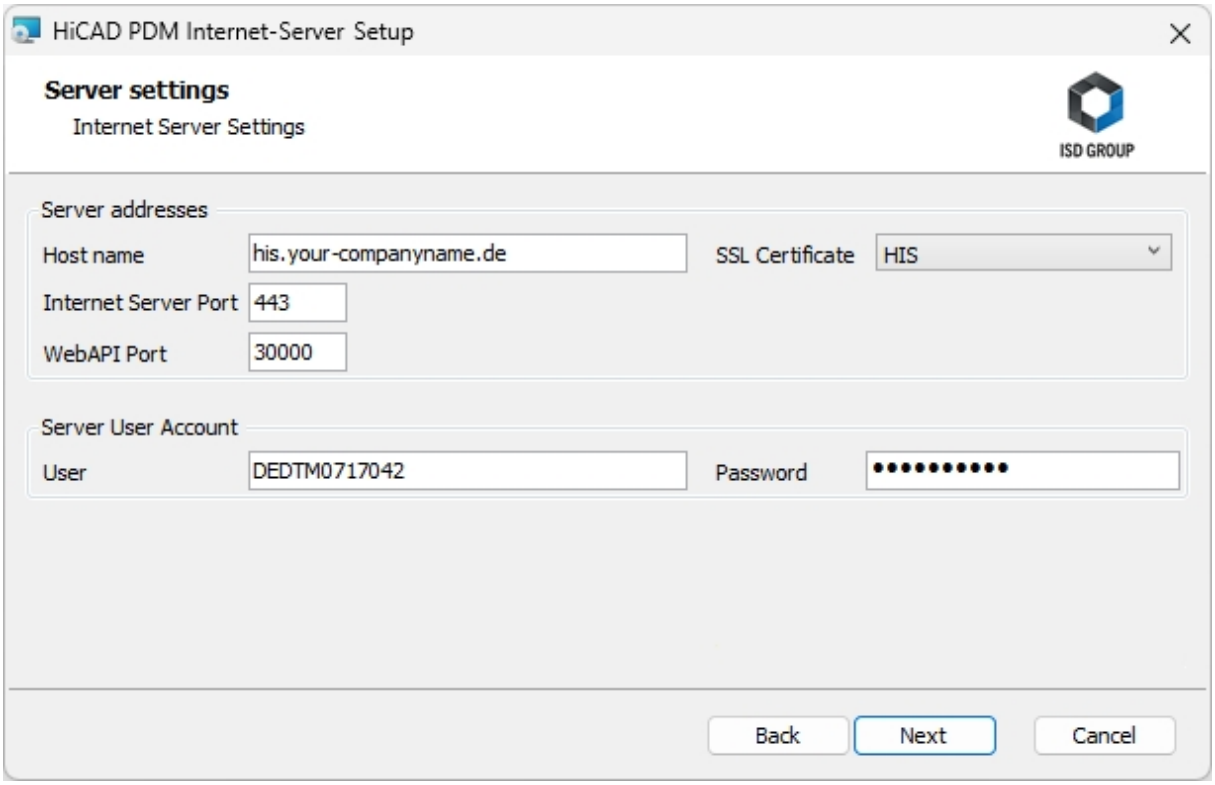


Click on the **HiCAD PDM Internet Server** button.





Enter the installation directory for the software. If the installation wizard finds an already installed version, it will be offered to you for updating.



Under **Server addresses**, enter the internet address for the HiCAD PDM internet server (e.g. his.isdgroup.com /) that can be reached from outside next to **Host Name**, and next to it select an SSL certificate for https that matches the internet address in the pull-down menu.

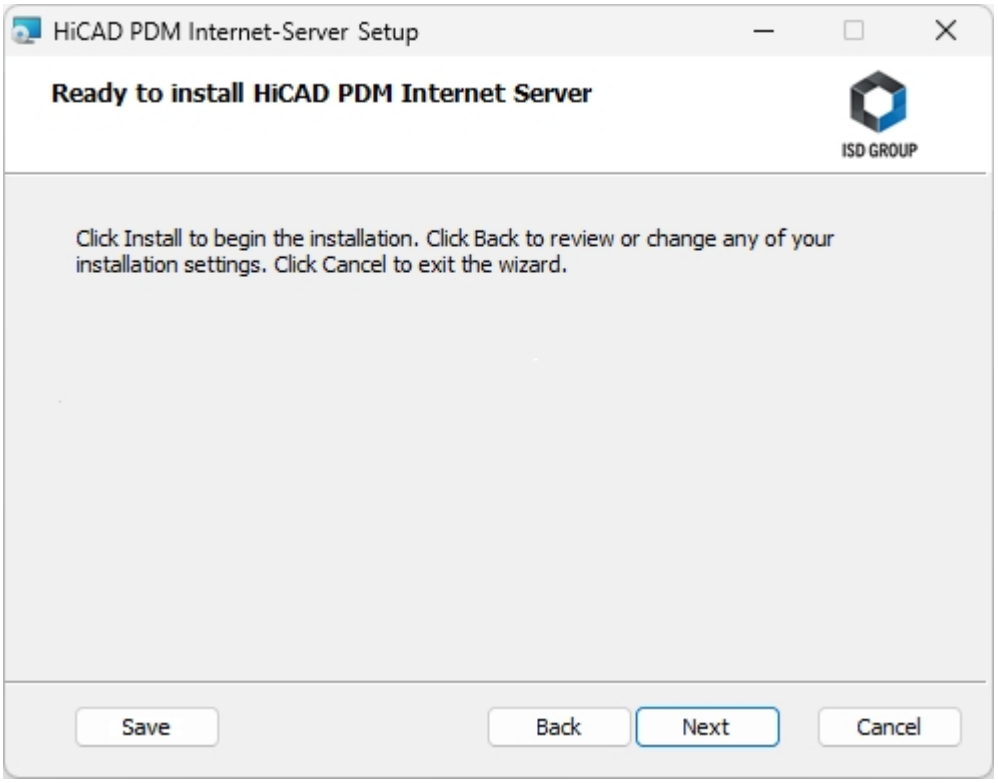
The corresponding port is entered one line below next to **Internet Server Port**, .below that the **WebAPI Port.**

Under **Server User Account** enter the Windows user account with **Password** under which HiCAD PDM functions are executed.

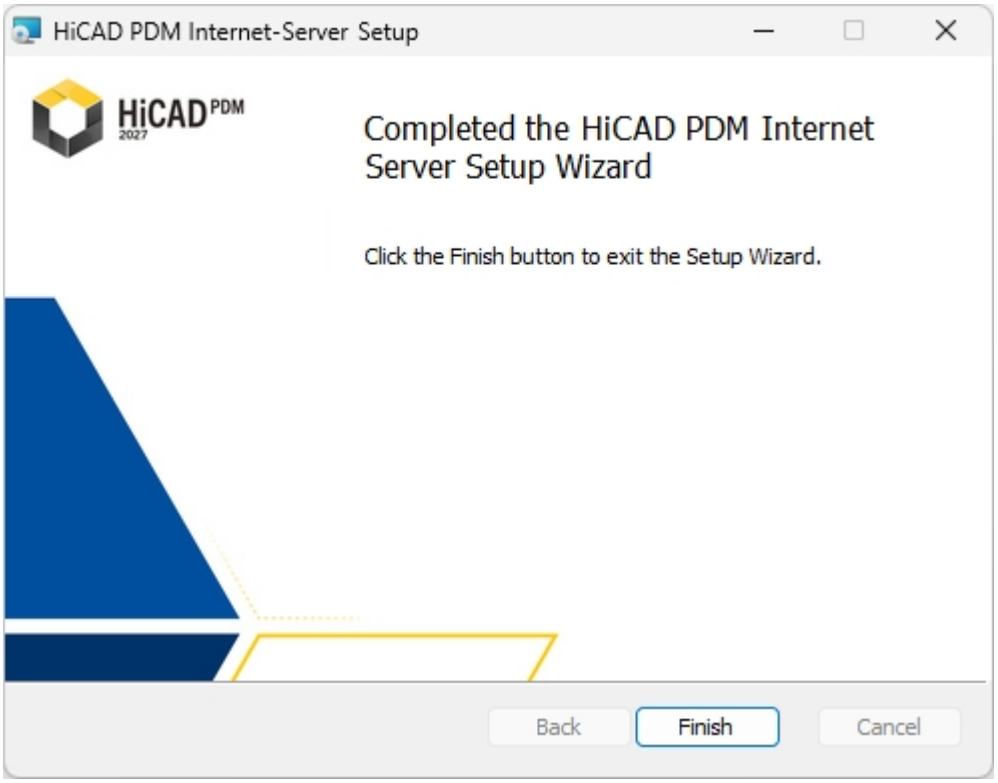
Under **E-mail connection**, enter the connection settings of the E-mail server, e.g. for sending "forgotten password" emails.

The E-mail server is set up in HiCAD PDM Desktop by clicking on the HiCAD PDM icon  and choosing **HiCAD PDM Options > E-mail**, as it is configured and used across applications (i.e. not just for the HiCAD PDM Internet Server).

Then click on **Next**.



Click **Install**.



After successful installation, the HiCAD PDM Internet Server can be found in the program folder.

Licensing

With regard to licensing, HiCAD PDM Internet Servers distinguish between Server (the **HiCAD PDM Internet Server** module) and Client (the **HiCAD PDM Web Viewer** module).

- Server licensing:
  - The server license is required to start the server within the IIS environment. The server is responsible for ensuring that the HiCAD PDM Internet Server can be called at all and that HiCAD PDM also offers a REST API via the HiCAD PDM Interent Server.
- Client licensing:
  - Licensing for the client corresponds to a **Concurrent-User** / **Floating** approach, i.e. similar to the use of a license server with multiple client installations. The client license is always used as part of a login, session by session. If one and the same HiCAD PDM user logs on to the HiCAD PDM Internet Server via different computers or browsers (on one and the same computer), they will use one license per session.

Please note:

- For server access, passwords for web access must be assigned to the corresponding user logins of the HiCAD PDM database (see HiCAD PDM Online Help).
- For the preview display of SZA files via the **HiCAD PDM Internet Server**, the HiCAD 3D Viewer must also be installed in the corresponding system.

Note on update installations

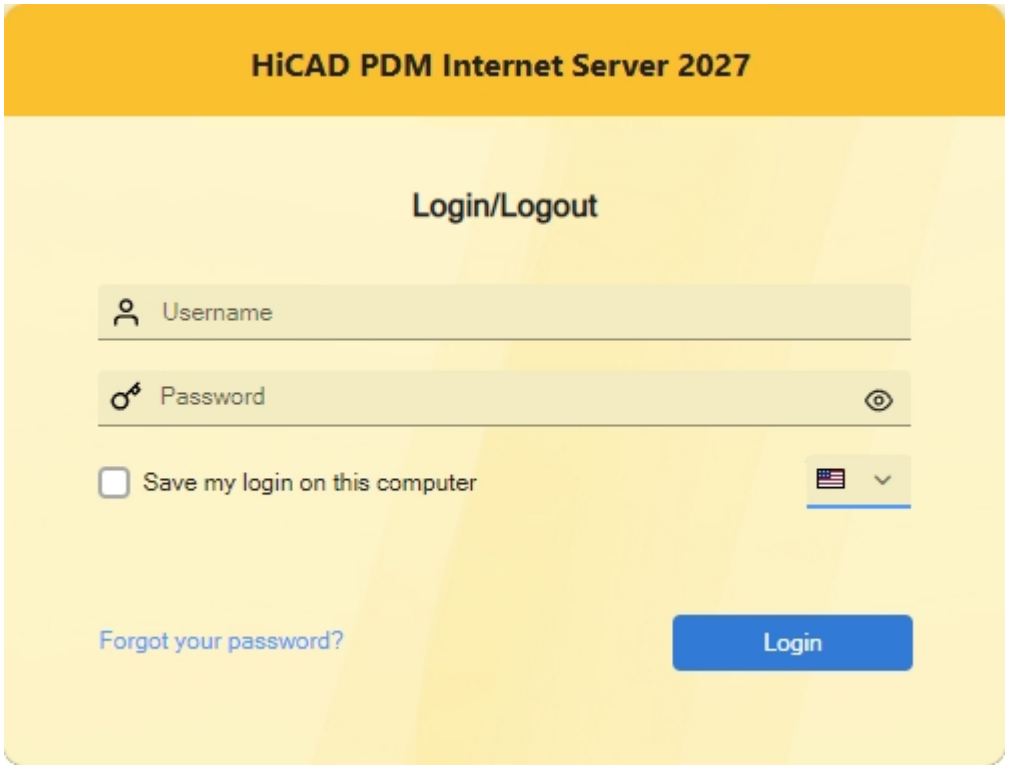
Some of the tools and components of HiCAD and HiCAD PDM that need to be installed separately are first uninstalled during updates and then reinstalled.

If errors occur or the installation is interrupted, the old version will be restored.

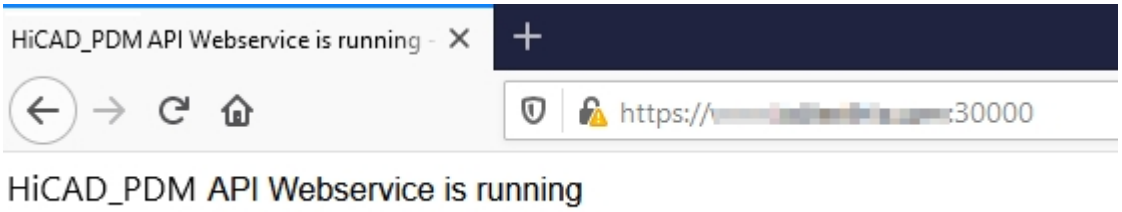
Checking the operability of the individual server components of the HiCAD PDM Internet Server

In a current browser, call up one after the other the domain names specified under **Server Addresses** including the **Port** (e.g. https://his.your-companyname.com:30000).

When calling the server address of the HiCAD PDM Internet Server, you must see the **Login** page.



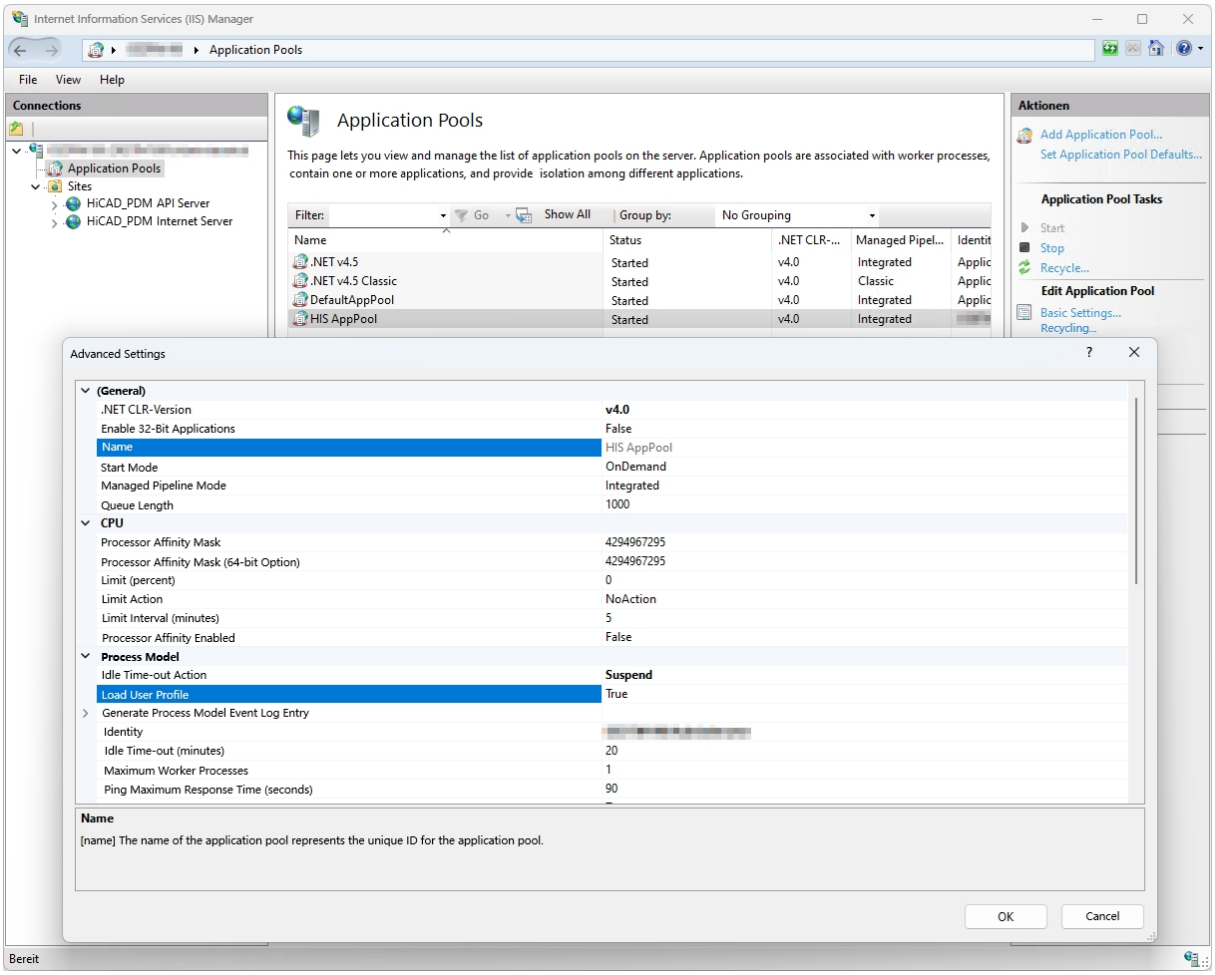
When you call up the **HiCAD PDM API Server** in your browser, you will receive a status message that the corresponding service is running (e.g. "HiCAD PDM API Webservice is running").



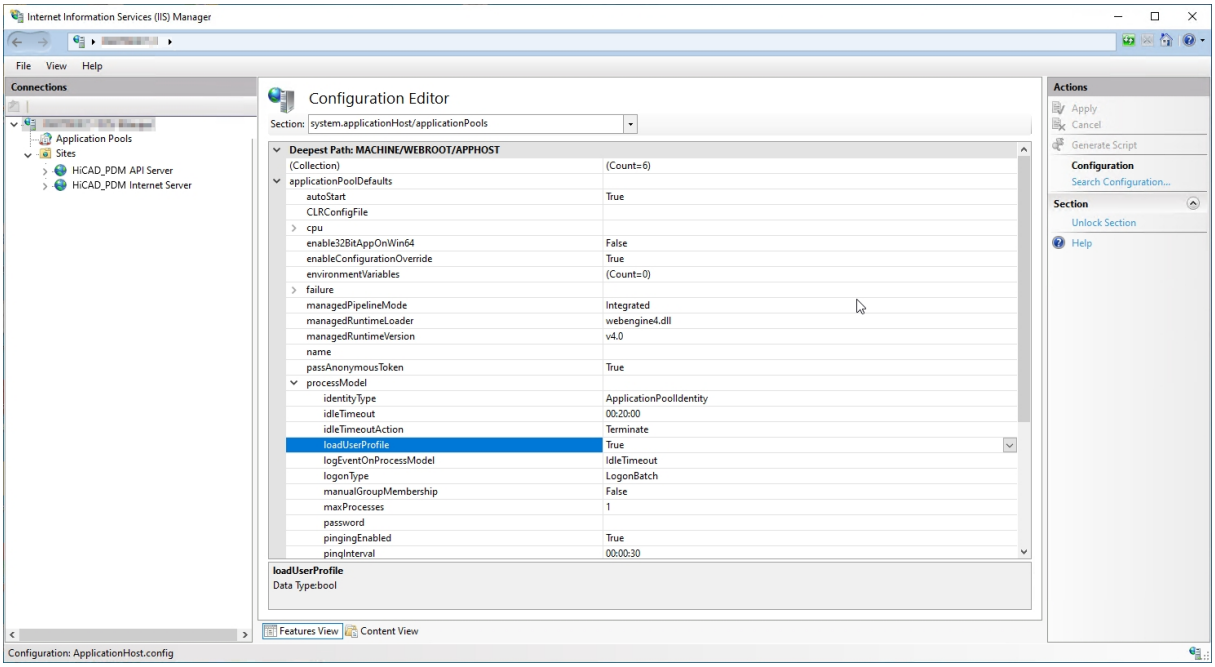
If you do not see a status message, please make sure that the **Application Pool** of the **HiCAD PDM API Server** is not running in the user context.

Therefore, please check the following two settings in the (IIS) Manager (Internet Information Services):

- Check in the **Advanced Settings** of the **Application Pool** of the **HIS APP Pool** whether the **Load User Profile** option is set to **True**.



- Also check if the option **LoadUserProfile** is set to **True** in the **Configuration Editor** of the server under the section "system.applicationHost/applicationPools".



Troubleshooting Support

Below you will find solutions to various problems that may occur during the activation of the HiCAD PDM Internet Server.

1. "Unexpected error" after login

How does the problem manifest?

After entering the user name and password when logging in to the HiCAD PDM Internet Server, the following error message appears in the browser:

An unexpected error occurred

How do I solve the problem?

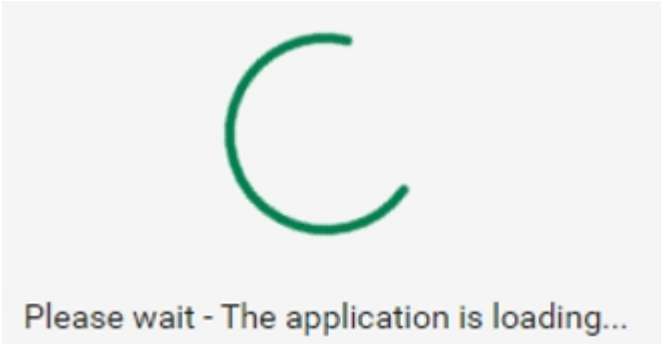
Please check whether the ODBC data source for the connection of the HiCAD PDM Internet Server to the database has been set up as a system DSN connection. If this is not the case, remove the DSN connection in the user context and replace it with a system DSN connection.

Why this is necessary: The IIS starts the HiCAD PDM Identity Server in a separate process, specified in the user context during installation. To ensure that the established ODBC connection can be accessed in this user context, it should be set up as a system DSN connection (user-independent).

2. Internet Server freezes after login

How does the problem manifest?

After entering the user name and password when logging in to the HiCAD PDM Internet Server, the login freezes, showing a "Please wait" message, even after a longer period of time:



Note: When the HiCAD PDM Internet Server is called for the first time (e.g. after restarting the server), it may take some time until the login occurs. In the background, the HiCAD PDM core is being initialised and started.

Therefore, please wait for a while and, if necessary, try logging in once more after closing the browser tab and calling the HiCAD PDM Internet Server URL again.

How do I solve the problem?

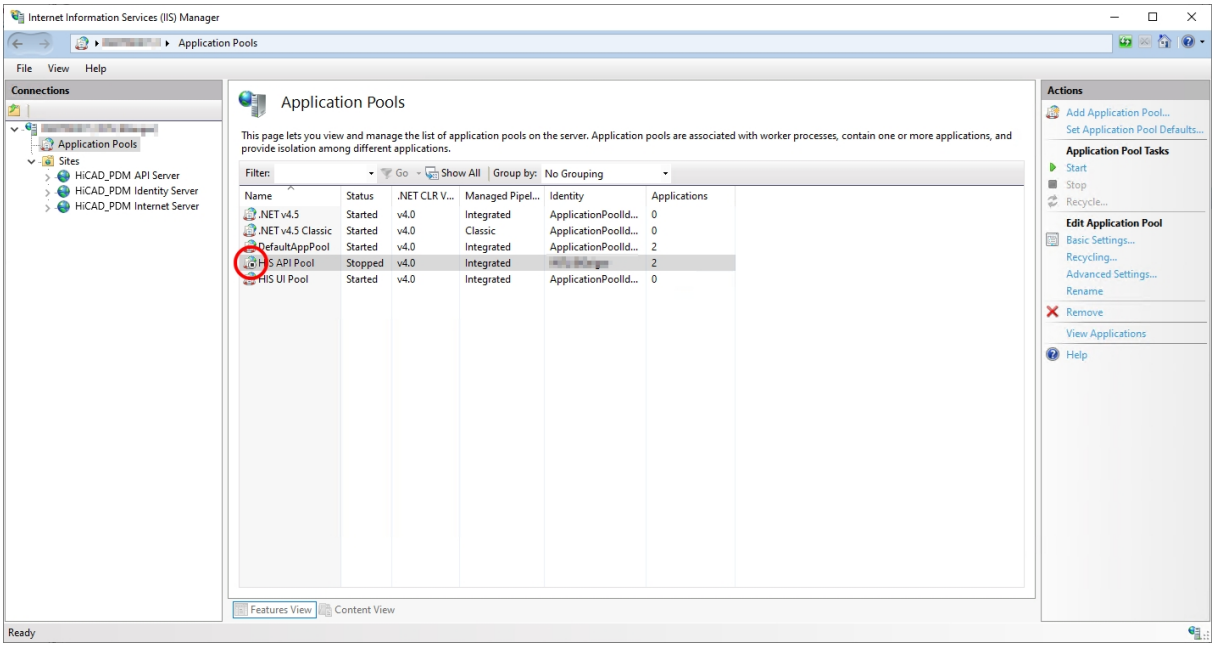
There are two situations that can cause the problem.

User data is wrong or rights are missing

If a "Service Unavailable" page appears when calling the URL for the HiCAD PDM API Server,



please check whether the Application Pool for the HiCAD PDM API Server is running or if it has been terminated. This can be recognised by the icon or by the status display in the IIS Manager:



If the Application Pool has been terminated (as is the case in the screenshot above), this may be due to data or permissions that are stored for the user to run the Application Pool being incorrect.

In this case, you should find a warning regarding the source WAS (Windows Process Activation Service) in the Windows Event Viewer of the server hosting the HiCAD PDM Internet Server, located in the section "Windows Logs" / "System".

The following text should be included in the details:

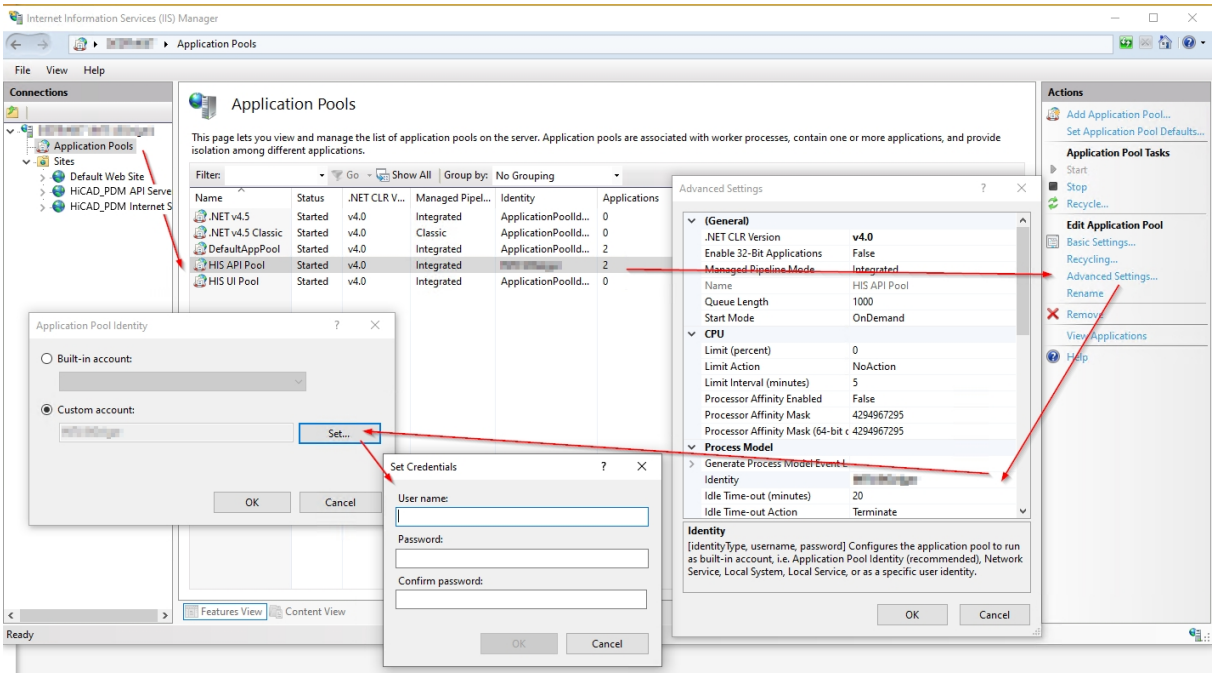
...

Application pool HiCAD PDM API has been disabled. Windows Process Activation Service (WAS) did not create a worker process to serve the application pool because the application pool identity is invalid.

...

If this is the case, two things must be checked:

1. User name and password for running the HiCAD PDM API Server must be correct. Please enter the correct data again if necessary:



2. The user specified for running the application pool must have sufficient permissions (see also https://learn.microsoft.com/en-en/troubleshoot/developer/webapps/iis/www-administration-management/default-permissions-user-rights#default-windows-user-rights-assignments); in particular, the following permissions are required and should be checked:

   a. "Sign in as a service"
   b. "Sign in as a batch job"

No license available or license already occupied

Check whether there is a hint under C:\Temp\HISLogs\CoreActivities\ pointing to the fact that the license could not be occupied in the daily log file. If this is the case, please check the available licenses using the ISD Licensing Tool.

3. Background activation service is not running

How does the problem manifest?

All web pages of the Internet Server (Internet Server, Identity Server, API Server) are not accessible. The corresponding pages in the IIS Manager are closed and when trying to launch the pages you receive an error

message saying that the background activation service is not running.

How do I solve the problem ?

Locate the "Windows Process Activation Service" (WAS) under Services in the Administrative Tools and start the service. If this fails, you can try running the service once by a command line with admin permissions. To do this, type "net start WAS" into the console window. The start of the service should also fail here but it will display an error message.

If "error code 13" is displayed here, please check the IIS log file (c:\windows\iis.log) to see if a line in the form of

```
< !!FAIL!! > Failed to create the NetFrameworkConfigurationKey key container (result=0x8009000f)
```

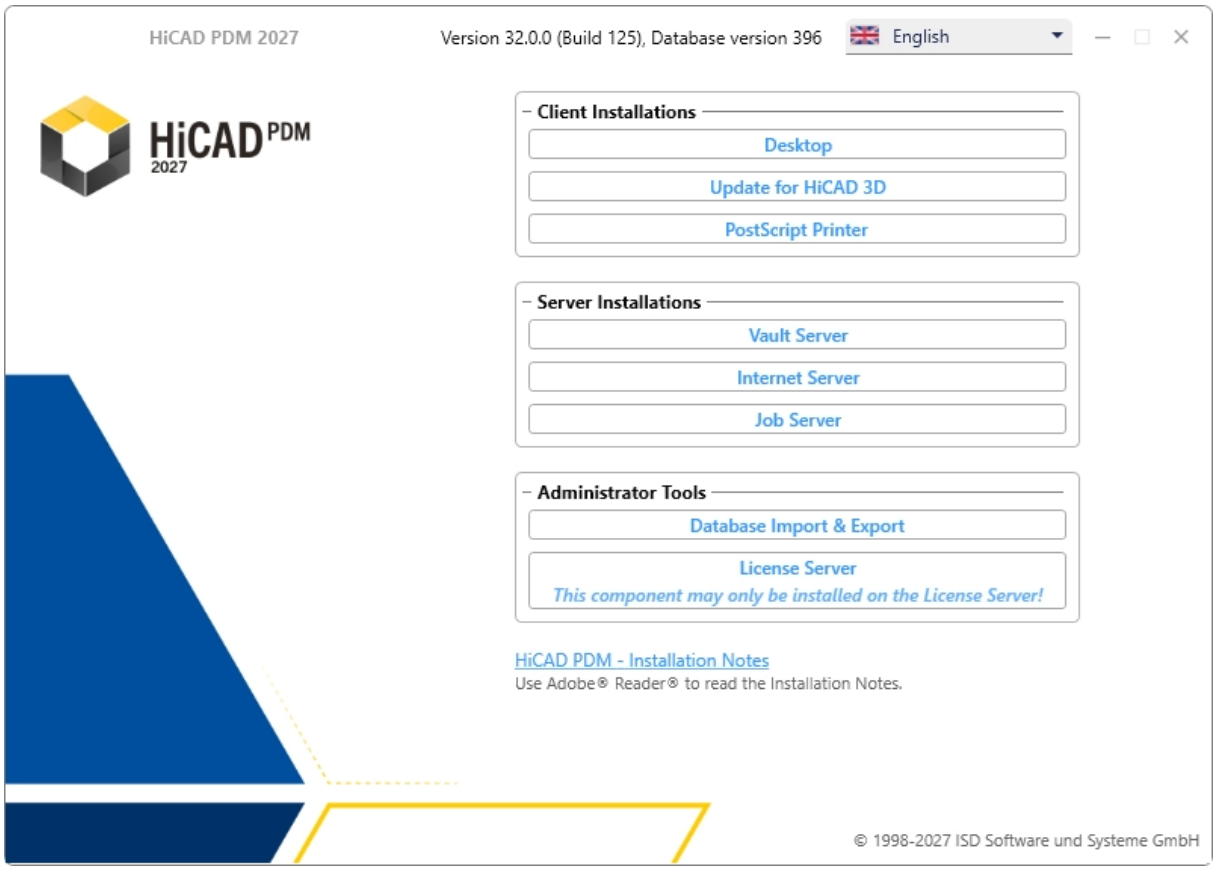
appears there. If this is the case, it indicates problems with the creation of a cryptographic key in the C:\Users\All Users\Application Data\Microsoft\Crypto\RSA\MachineKeys folder. If no keys for other relevant applications are stored there, you can delete the folder as an administrator. Afterwards, you should be able to start the Windows Process Activation Service manually again and Windows will automatically recreate the MachineKeys folder.

To prevent data loss, it can be useful to back up the contents of the MachineKeys folder before deleting it.

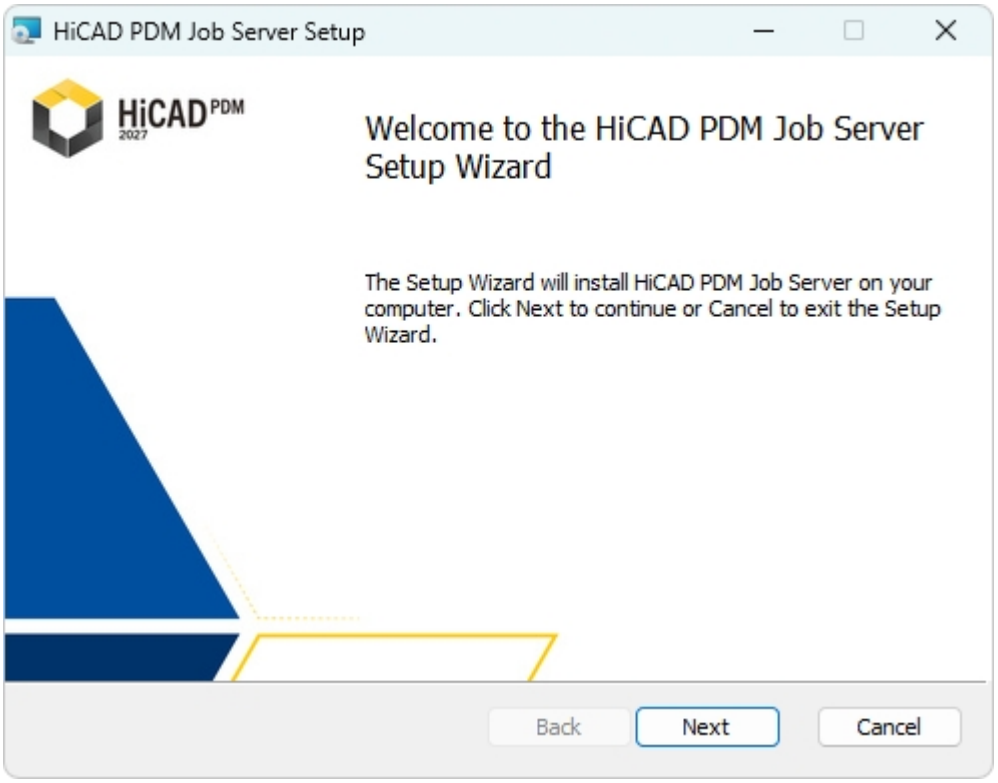
Installing the Job Server

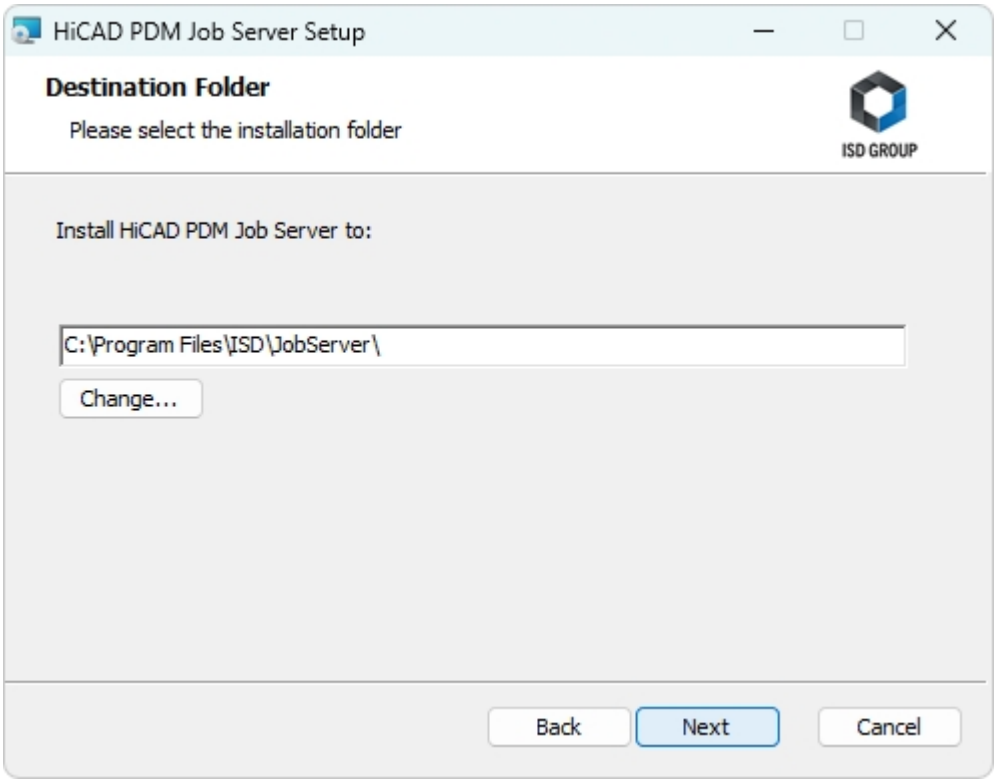
Start Windows to install the Job Server. If Windows has already been opened, close all other applications and start the installation wizard.

Leave the selection mask of the installation wizard open, so that you can select the desired components one after the other.

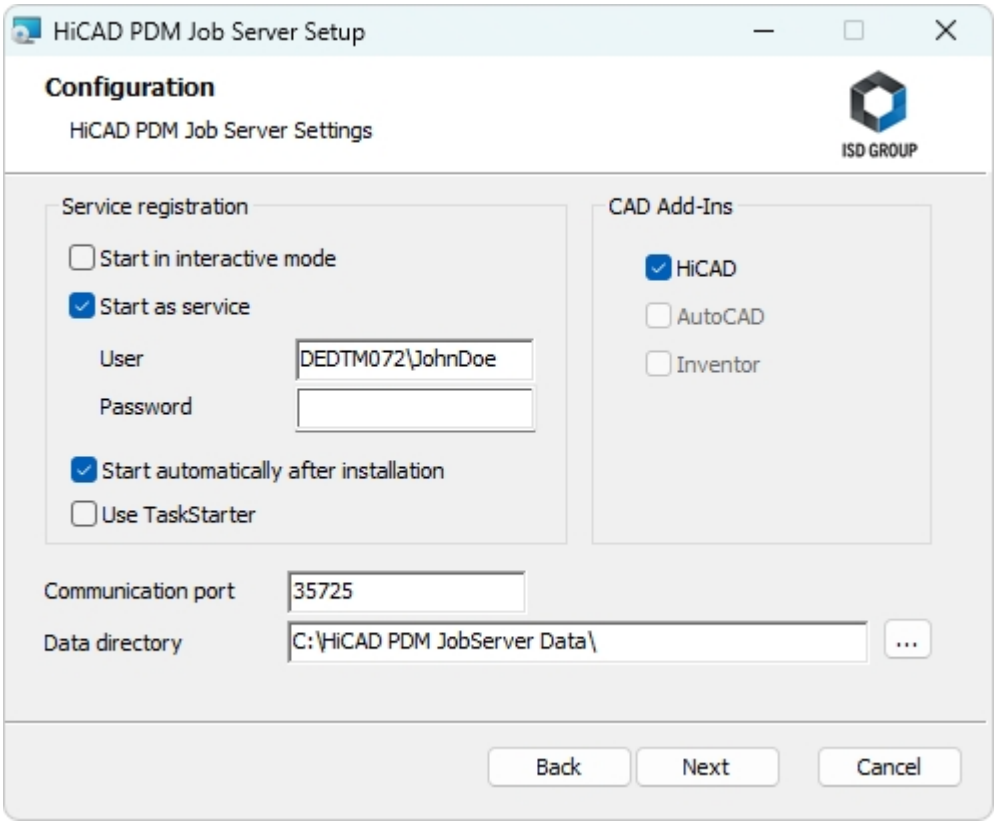


Click on the **Job Server** button.





Enter the installation directory for the software. If the installation wizard finds an already installed version, it will be offered to you for updating.



In the Service registration area you can choose between the options Local system and User account.

A part of the Job Server is started by the system as a background process (Windows service). For safety reasons it is recommended to create a **Windows User account**, with **User name** and **Password** with read and access permission, before installation.

If you do not know the user yet, you can choose Local system. The Job Server will then run, initially without access to any printers, as a simple Windows system service. Now, select **Control Panel > Administrative Tools > Services**. Right-click **Job Server** and select **Properties**. On the **Log On** tab, switch to **This account** and enter the **User name** and the **Password**.

Important:

If the Job Server user's password later changes or expires, the password must be reassigned to the Job Server service in the Windows **Control Panel** at **Management > Services** via **Right-click > Properties > Log On**.

Please also note the following regarding update installations: You may need to re-enter the service account password. When you click Next or Update in the dialogue window (or, in the case of a silent installation, as documented in the log), the password is then verified. If the verification cannot be carried out (e.g. if network logon is prohibited by policy, no domain controller is accessible, etc.), a warning will be displayed. If an incorrect Windows username or password is entered for the service account, a message such as the following appears: “Login with the service account <server name\username> failed: The user name or password is incorrect.”

If the **Start automatically after installation** option is active, the Job Server service will not require a manual start after installation.

Normally, the Job Server runs as a Windows Service in the background. In this standard configuration the Job Server process will be started by the operating system in a special session which is not visible for the user.

Therefore, the process will even continue running after the Job Server user has logged off from the computer. Unfortunately, internal tests have found that problems may occur with this type of operation in conjunction with some CAD systems.

Should you encounter any problems,, we therefore recommend choosing the **Start in interactive mode** option during installation. When this option has been selected, the Job Server will no longer be set up as a service, but will be started directly in the foreground via the Administration UI. During this type of operation, the Job Server process will appear in the form of a small text window in the window bar (Caution: When you log off from the Server, the Job Server process will also be ended here!)

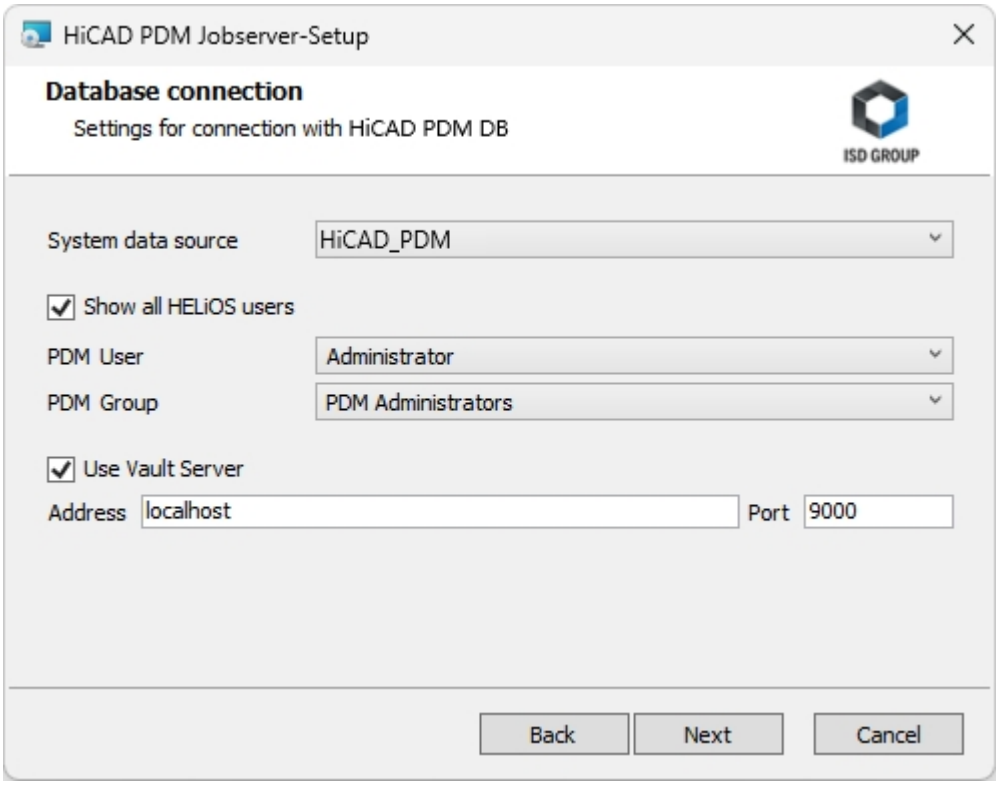
For starting the “interactive” configuration of the Job Server automatically, the file **JobServer.exe** from the installation directory must be invoked with the option “–no service”, for instance, either from the “Autostart” folder or via **Windows task planning**. If you have further questions, please contact our ISD Consulting team.

You can activate the **Use TaskStarter** checkbox to set it up directly as part of a new **Job Server** installation. This option is not available for update or change installations; however, the TaskStarter can also be installed separately.

The **Communication port** is used for communication between client and Job Server as well as for monitoring via the Server Monitor.

Select the data directory. Activate the Create network share checkbox to enable the communication with the **PrintClient**. If the network share is not created during installation, it must be created manually afterwards. Since special settings will be required here, we recommend contacting our Consulting team.

Choose the CAD system that you want to link to the Job Server, and click **Next**.

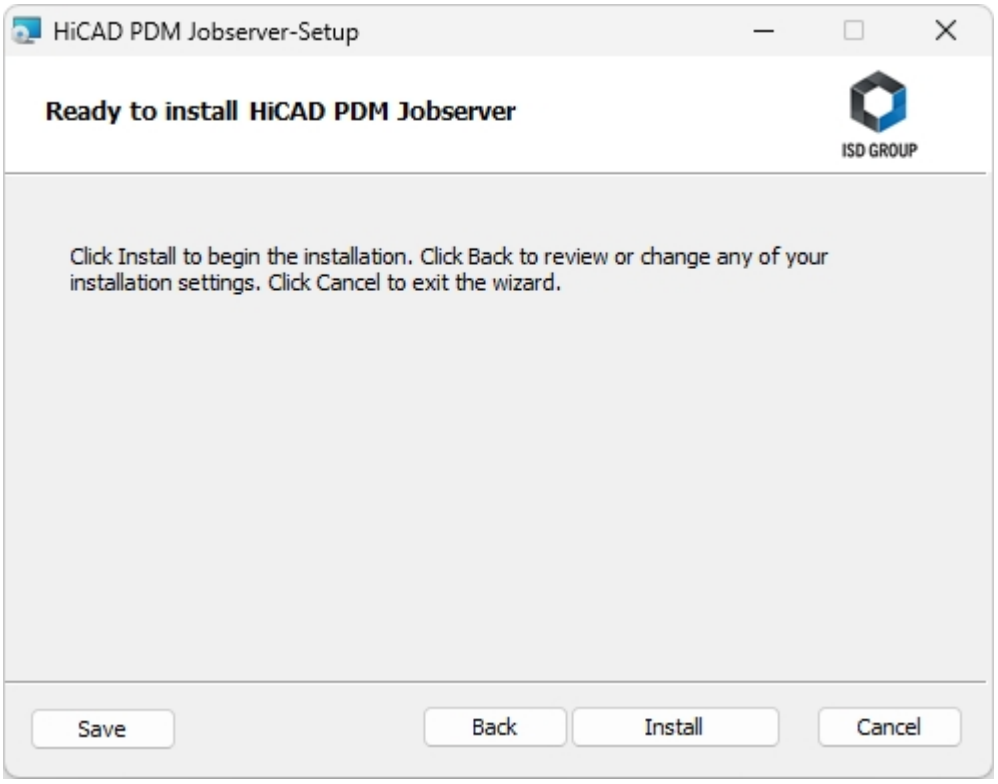


In this dialogue window you will be asked for the login of the database user, which is the login of the (SQL) database system.

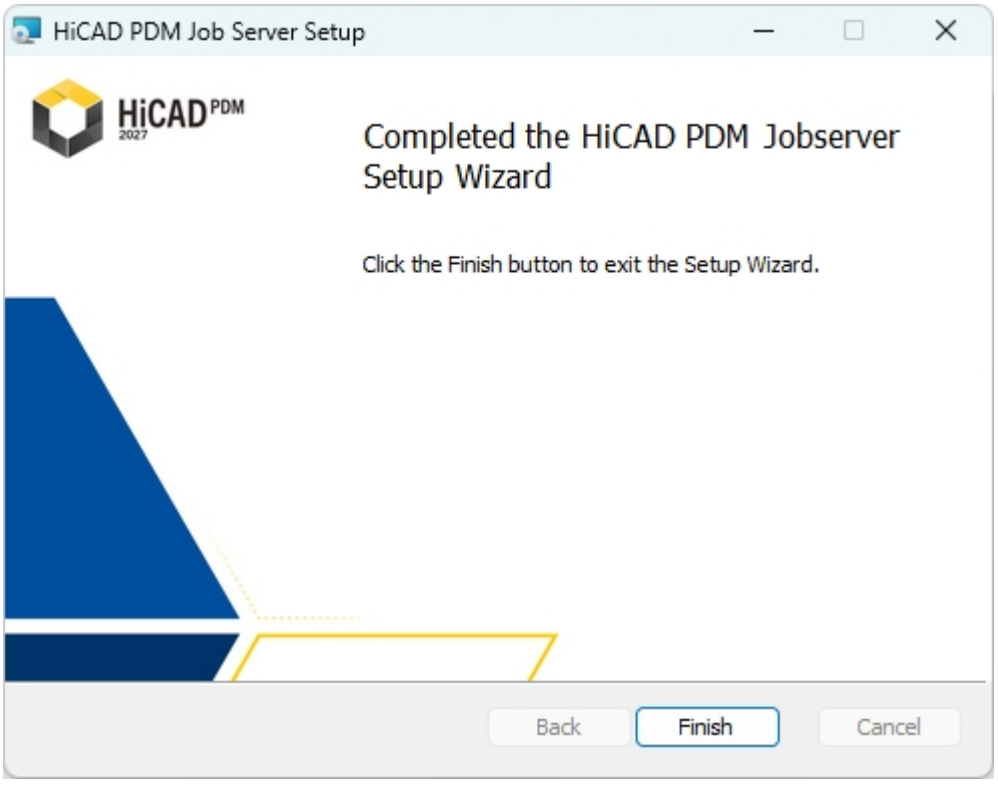
For **System data source** you have to select the corresponding ODBC database connection. Here the **HiCAD PDM User** is selected, over which the Job Server runs. It is important that this user has admin rights and is also assigned to the **HiCAD PDM Group** of "PDM administrators" here. Otherwise you will get an error message. Then you will be asked for the login of the database user. This is the login of the (SQL) database system.

Activate **Use Vault Server** and enter the **Address** and **Port** of the Vault Server installed in the system for your Multi-CAD operation.

Click **Next**.



Click **Install**.



Click **Finish** to complete your installation.

After successful installation, the Job Server can be found in the program folder.

Note on update installations

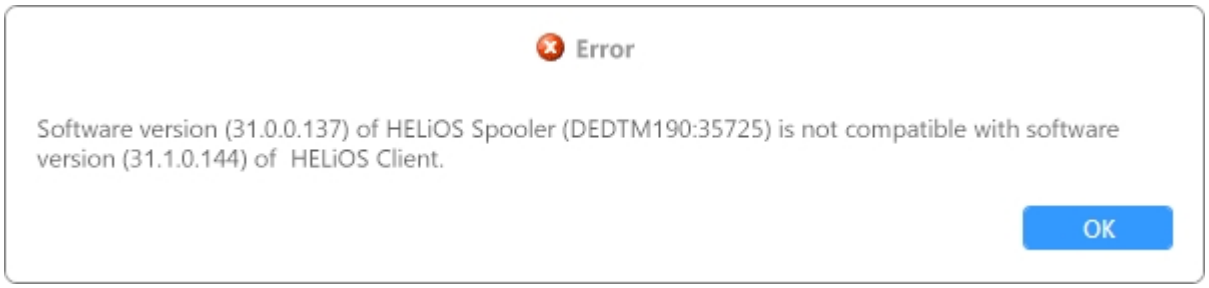
Some of the tools and components of HiCAD and HiCAD PDM that need to be installed separately are first uninstalled during updates and then reinstalled.

If errors occur or the installation is interrupted, the old version will be restored.

Troubleshooting

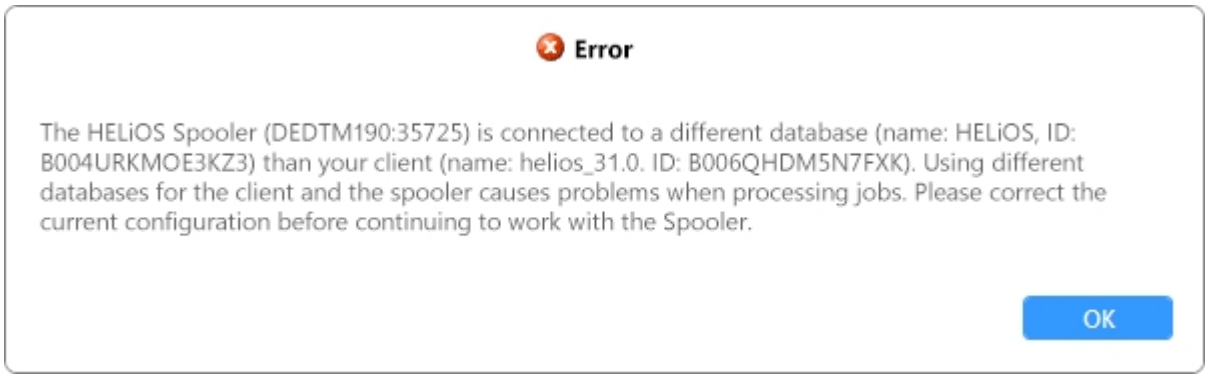
Check version compatibility

Since the Job Server and the HiCAD PDM Client work with the same database and the database version can change per service pack, they must have the same version (e.g. both 2025 Service Pack 2 or both 2027 Major Release). The version numbers are checked at startup and an error message is displayed if necessary..



Check database connection

The Job Server can only work in conjunction with the HiCAD PDM Client if both are connected to the same database. Both the database name and the database ID are checked for consistency. If the information does not match, the following error message appears:

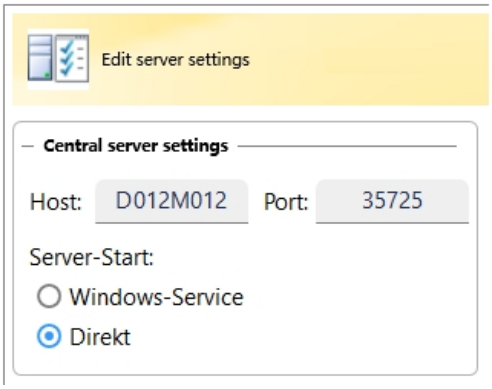


Communication between HiCAD PDM and Job Server

For communication with the Job Server, HiCAD PDM uses an interface similar to the HiCAD PDM Internet Server or the HiCAD PDM Vault Server. This means that the server name and the port must be specified in the configuration. The default port of the Job Server is 35725. If errors occur during the connection, the following points must be checked.

Check Settings: Server

If problems occur, the settings on the server and workstation side must be checked. The currently used computer name and port are noted in the Job Server's Admin Tool:



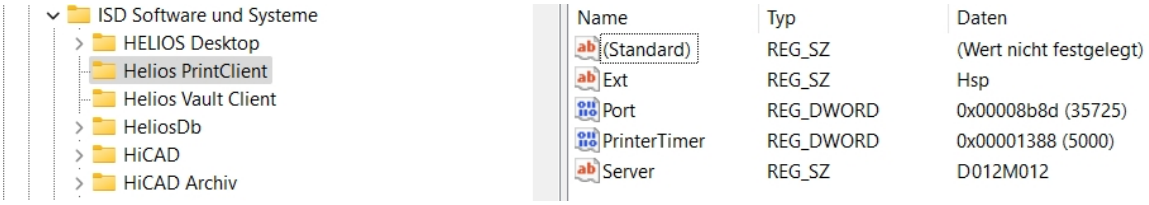
Since a server can theoretically have several names, the name under which the server can be accessed from the workstations must be entered here.

Important:

After moving a server, the new name must also be entered correctly here, in addition to the adjustments on the workstations.

Check Settings: Client

If the client (workstation computer) cannot connect to the Job Server, the settings must be checked first. These can be found in the Registry Editor.



The values for **Server** and **Port** must match the settings on the server side exactly. Alternatively, the **IP address** of the server can be entered instead of the server name.

Please note:

When changing the settings, the HiCAD PDM Desktop always has to be restarted.

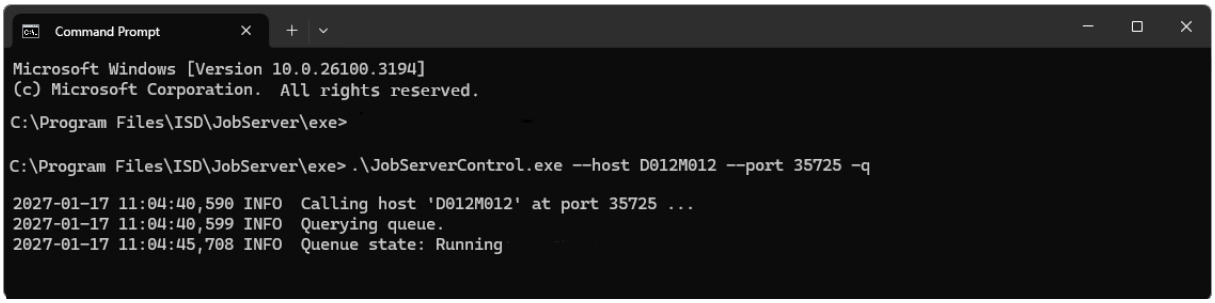
Function test: Server

By using the Windows command prompt, it can be checked in the exe directory of the Job Server whether the Job Server process is running under the set host name and port and whether it is responding to requests.

In the command prompt, change to the EXE directory of the Job Server installation and then enter the following command:

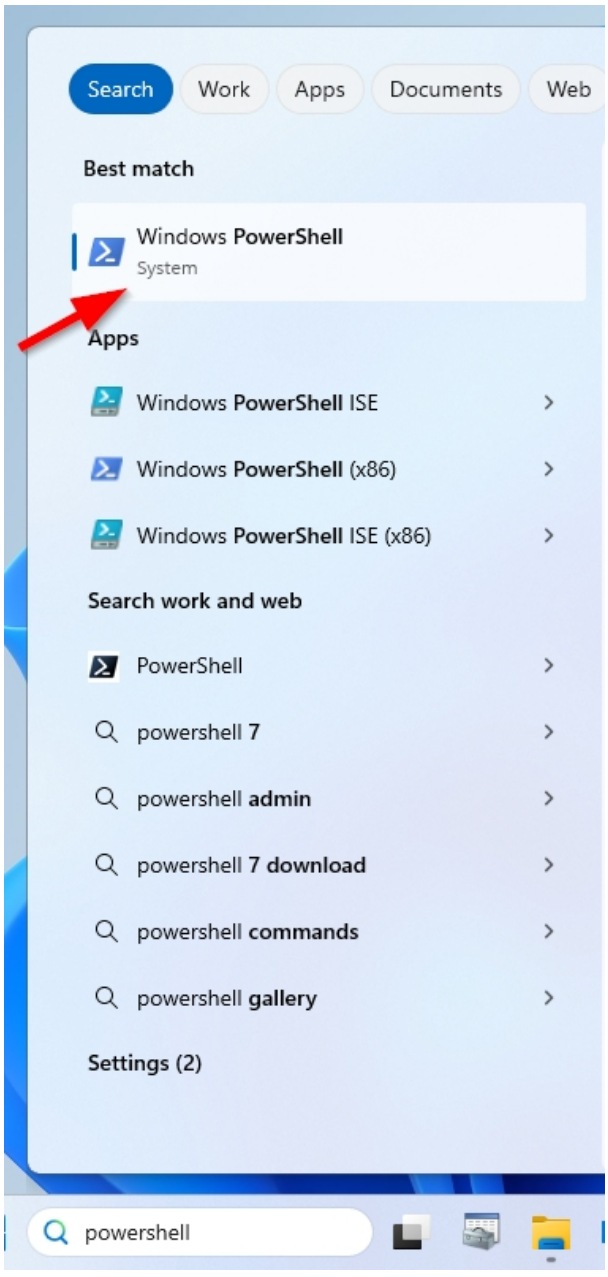
```
.\JobServerControl.exe --host XXXXXX --port 35725 -q
```

Replace **XXXXXX** with the server name.

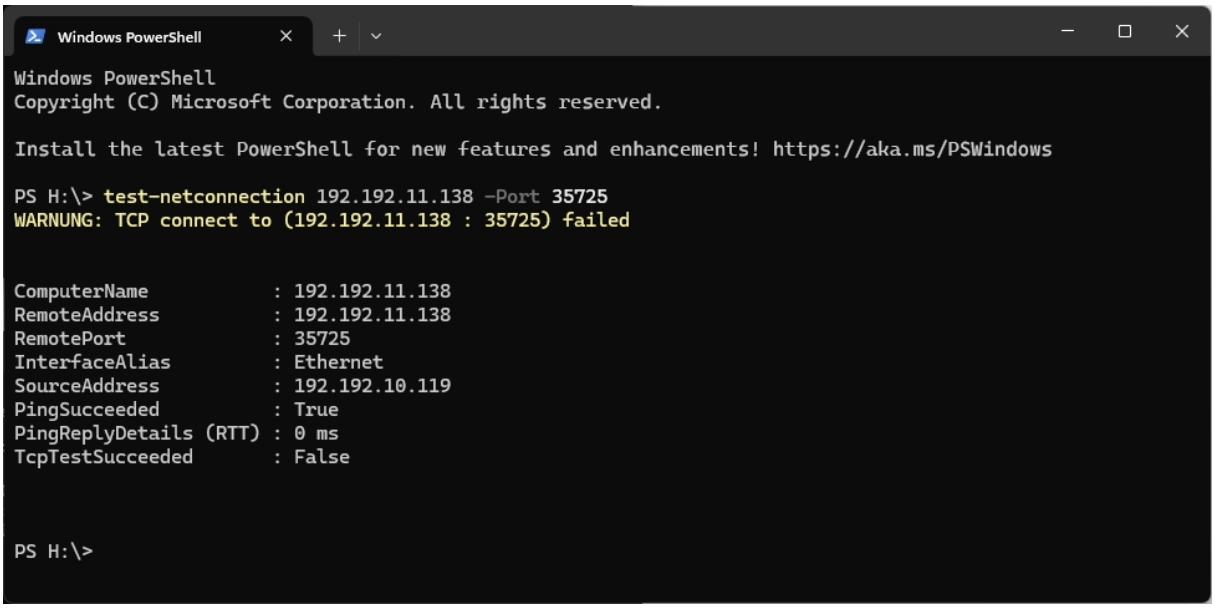


Connection test in the Windows PowerShell

If the Job Server cannot be accessed, this is often caused by the server firewall. In this case, there is often no inbound rule defined for the JobServer.exe or the port. In this case, you can use **Windows PowerShell** on the workstation to check whether the port is open or not, independently of HiCAD PDM. Proceed as follows:

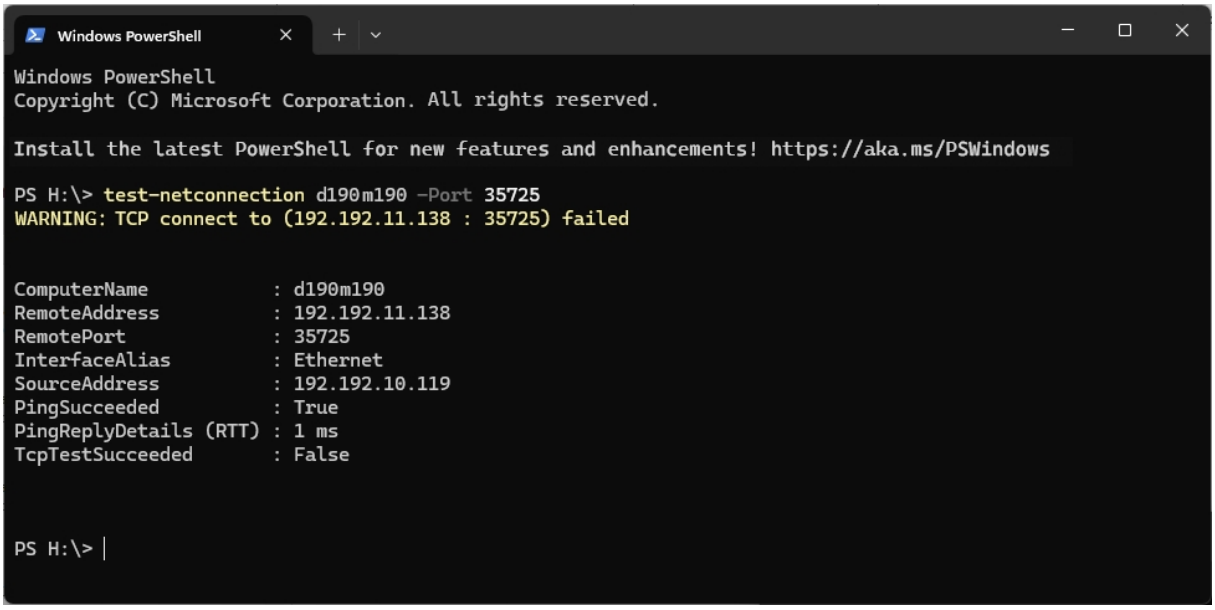


Enter PowerShell in the Windows search field. Then open the **Windows PowerShell Console**.



To check the port via the IP address, enter the following in the input window:
`test-netconnection XXX.XXX.XX.XXX -Port 35725`

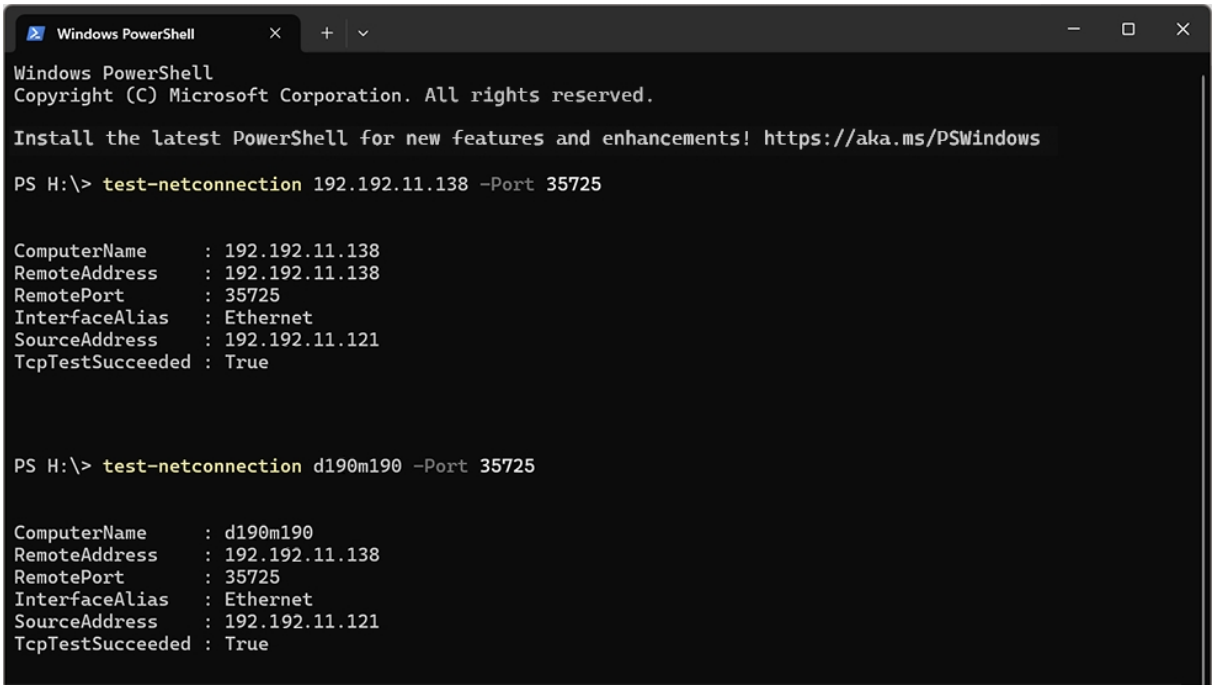
Replace **XXX.XXX.XX.XXX** with your IP address.



If you want to check the port via the computer name, enter the following:
`test-netconnection XXXXXX -Port 35725`

Replace **XXXXXX** with your computer name.

The result should then look like this:



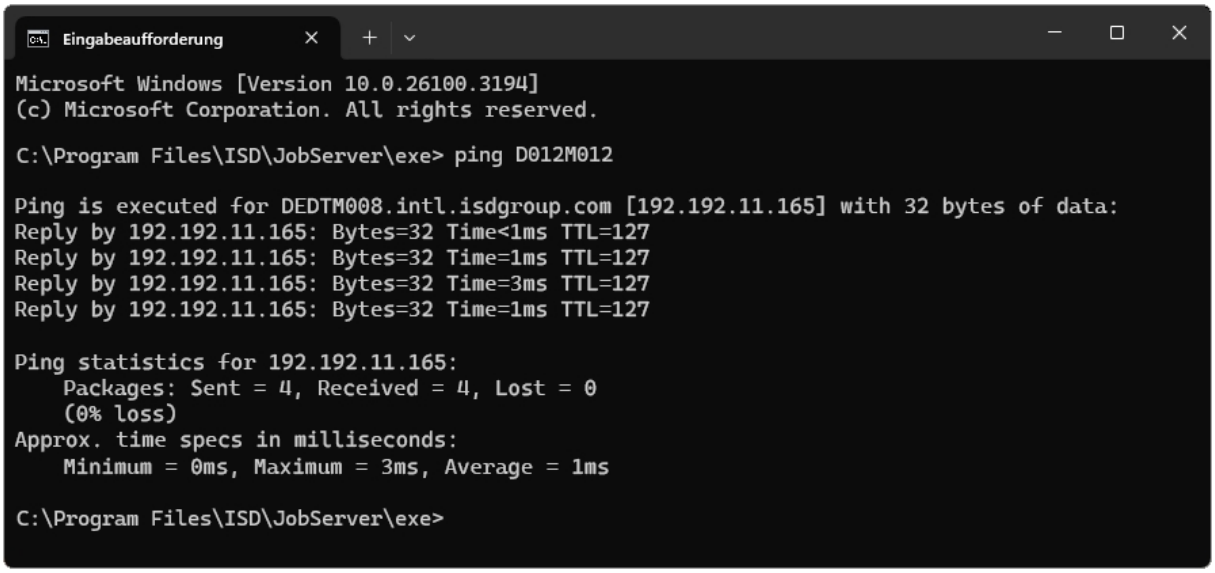
Check connection

First of all, you need to check whether the server can be reached from the client. If this is not the case, it is a matter for the user's IT department.

In the command prompt, change to the EXE directory of your Job Server installation and then enter the following command:

ping XXXXXX

Replace **XXXXXX** with the server name.



The connection test can also be carried out in PowerShell on the workstation (Test-NetConnection, see above). If the Job Server process is running and the test works on the server but fails on the client, the problem lies in the connection between the two computers.

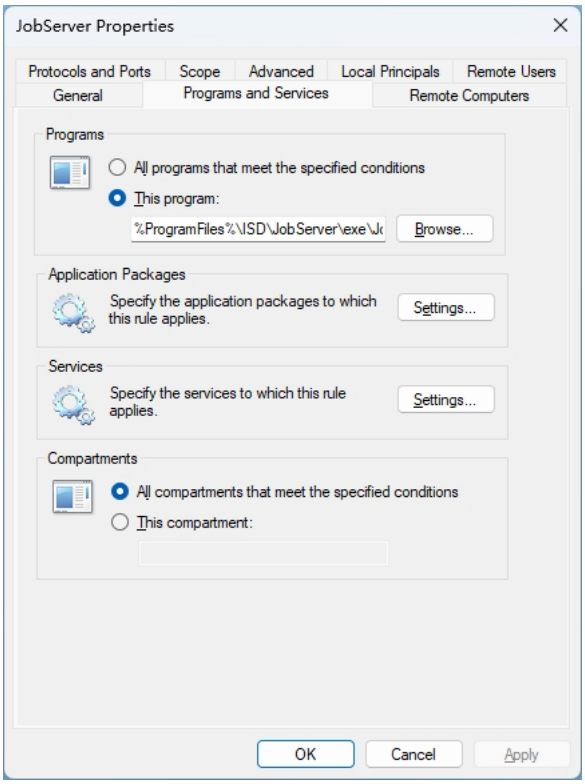
If the TCP connection fails, but the ping test was successful, the problem is probably a firewall that is not set up correctly.

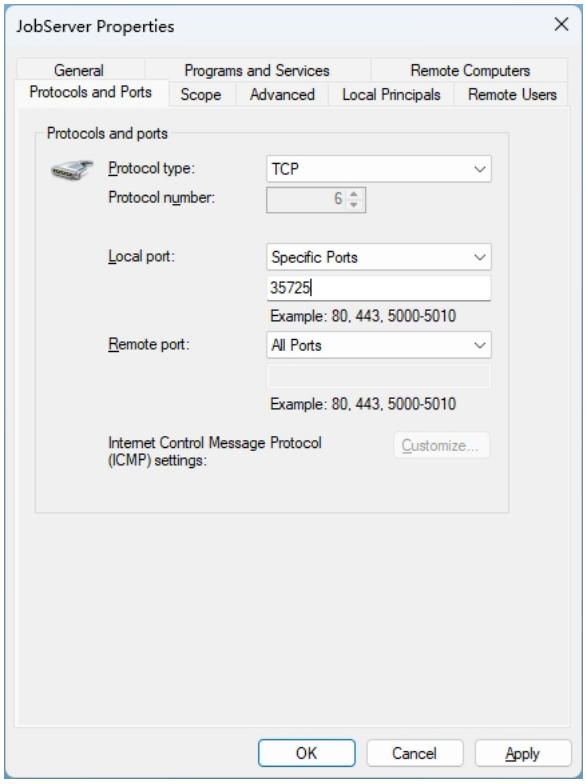
Important:

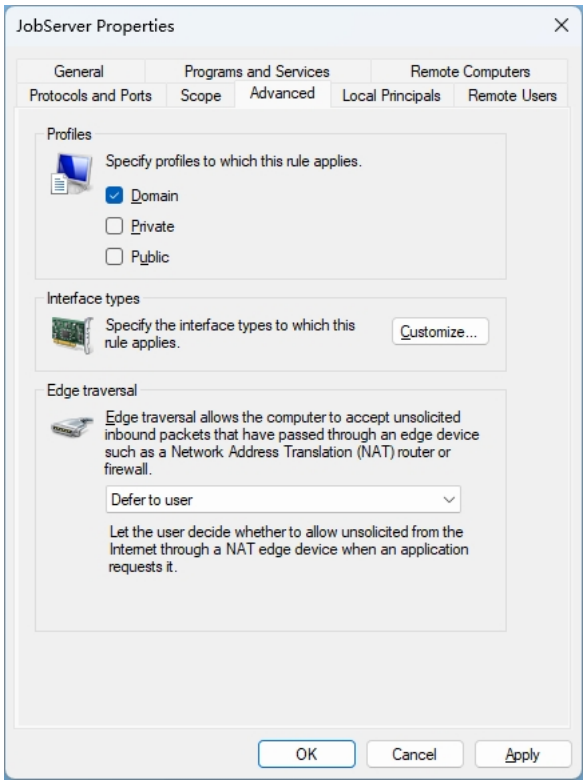
We can only provide limited assistance with the user's network settings.

If the **Windows Defender Firewall** is used, a suitable **Inbound Rule** for the Job Server should be defined there. If there is no firewall for the Job Server, you have to create one.

Open the **Windows Defender Firewall** and then go to **Advanced Settings** on the left. Now open the **Inbound Rule**, right-click on the **Job Server** and select **Properties**. The properties should be set as shown in the following figures.

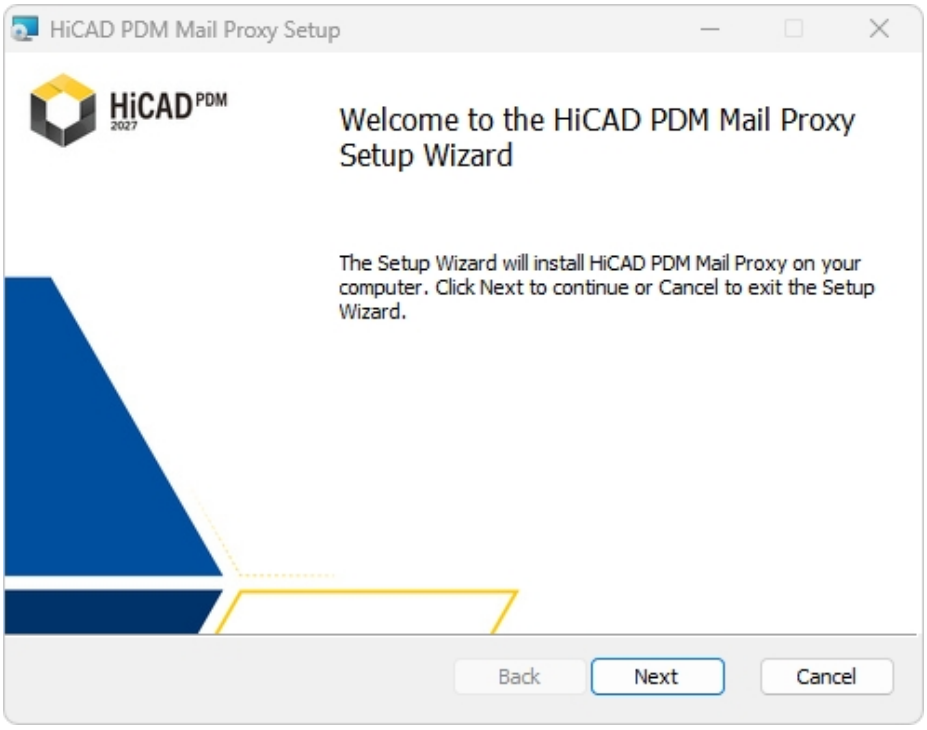



JobServer Properties
General
Programs and Services
Remote Computers
Protocols and Ports
Scope
Advanced
Local Principals
Remote Users
Protocols and ports
Protocol type:
TCP
Protocol number:
6
Local port:
Specific Ports
35725
Example: 80, 443, 5000-5010
Remote port:
All Ports
Example: 80, 443, 5000-5010
Internet Control Message Protocol (ICMP) settings:
Customize...
OK
Cancel
Apply

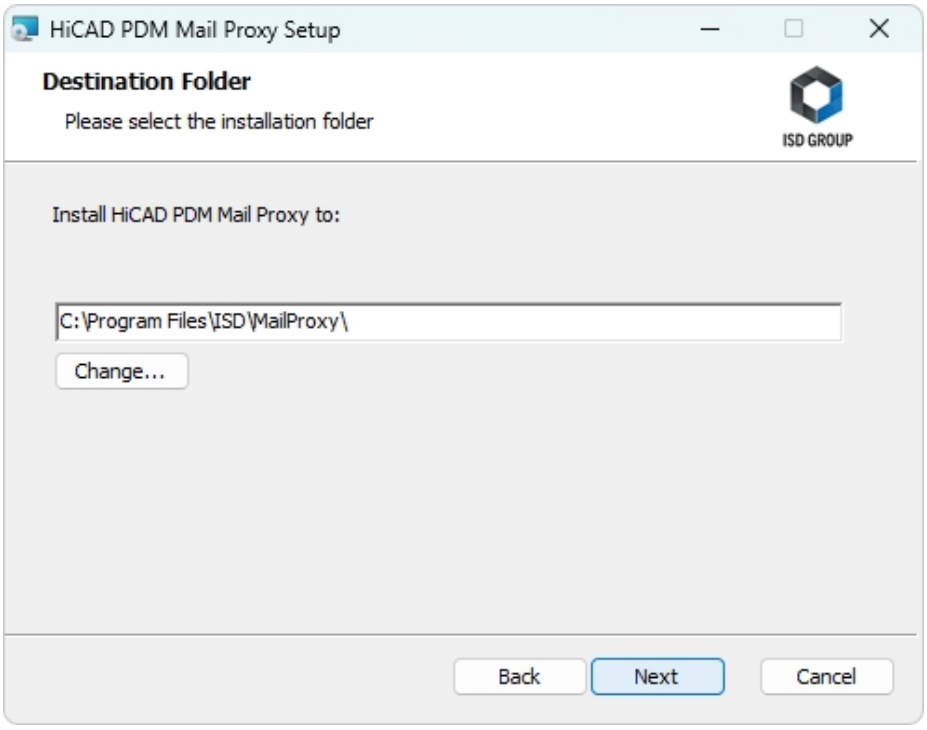

JobServer Properties
General
Programs and Services
Remote Computers
Protocols and Ports
Scope
Advanced
Local Principals
Remote Users
Profiles
Specify profiles to which this rule applies.
Domain
Private
Public
Interface types
Specify the interface types to which this rule applies.
Customize...
Edge traversal
Edge traversal allows the computer to accept unsolicited inbound packets that have passed through an edge device such as a Network Address Translation (NAT) router or firewall.
Defer to user
Let the user decide whether to allow unsolicited from the Internet through a NAT edge device when an application requests it.
OK
Cancel
Apply

Installing the HiCAD PDM Mail Proxy

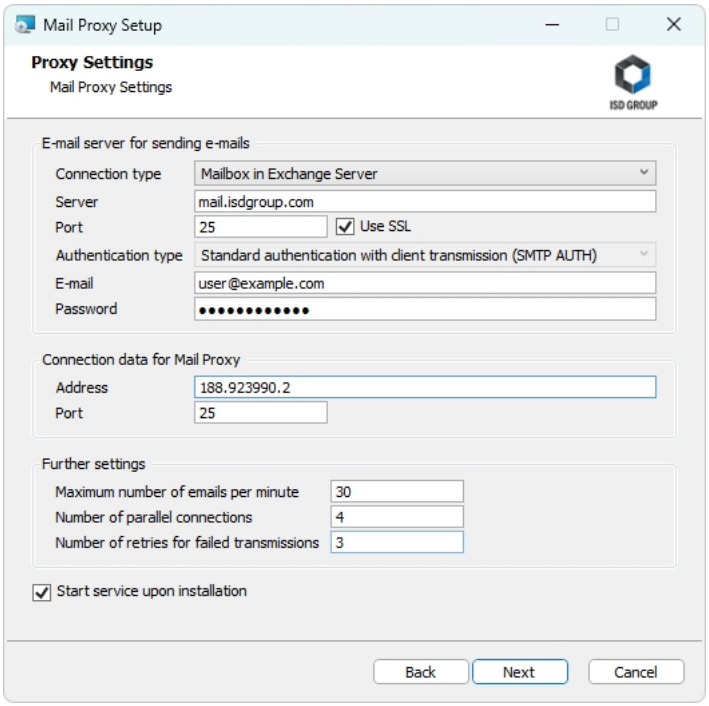
Before you begin installing the HiCAD PDM Mail Proxy, please ensure that **.NET 9.0** is already installed on the system. This component is required for the HiCAD PDM Mail Proxy to run properly. Then run the SETUP.EXE file to install the Mail Proxy. It is located on the HiCAD PDM installation media in the **Tools > Mail Proxy** directory



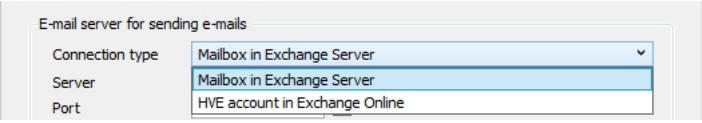
The installation suggests **C:\Program Files\ISD** as the installation path.



Parallel installations of the Mail Proxy are not supported. However, it is possible to create multiple services that use the same Mail Proxy with different configurations. Therefore, attempting to install the software when a Mail Proxy is already installed will result in an update installation.



Connection type



In the drop-down menu, you can choose between:

- **Mailbox in Exchange Server**
- **HVE account in Exchange Online**

The setting **Mailbox in Exchange Server** allows you to set up the HiCAD PDM Mail Proxy on your system without establishing an interface with Exchange Online. The setting **HVE account in Exchange Online** enables you to establish an interface with Exchange Online. The **Server**, **Port**, and **SSL** settings are automatically configured, as Microsoft predefines them.

Please note:

You can find the description of the HiCAD PDM Mail Proxy with **HVE account in Exchange Online** here.

Server and **Port**

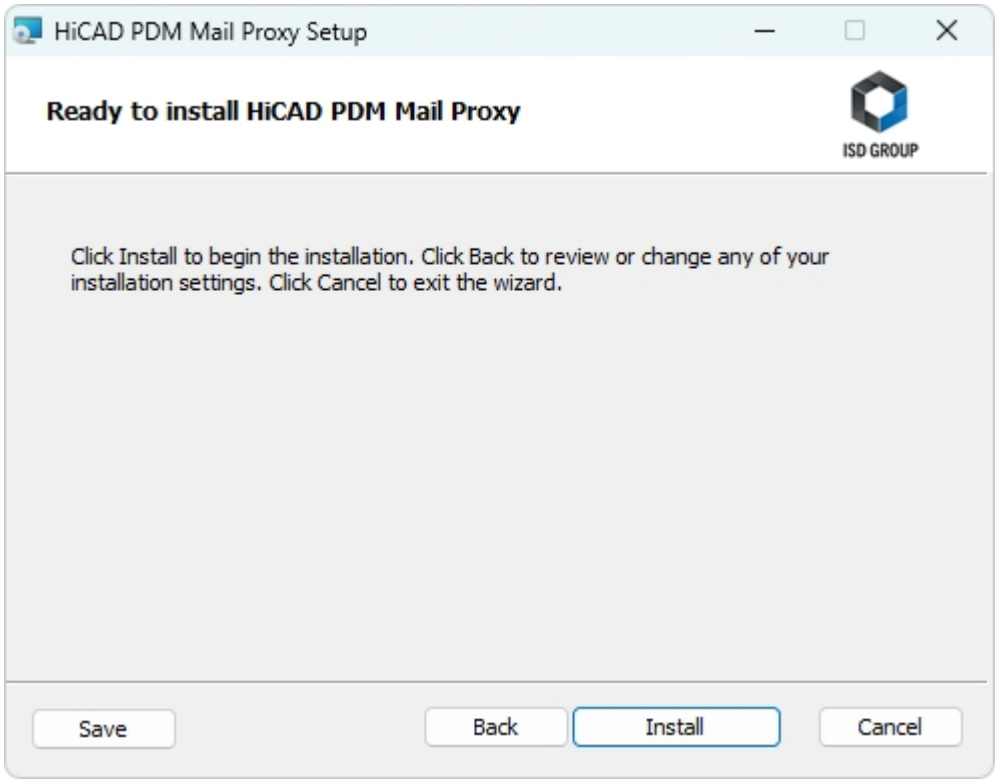
nter the mail server address (e.g., Mail.YourCompanyName.de) and the corresponding port through which emails are to be sent. The Mail Proxy connects to the mail server configured here. Instead of the mail server address, you can also enter the IP address.

Use SSL	Here, you specify whether data transfer between the mail proxy and the server should be encrypted. **true** is recommended.
Authentication type	If you set up a mail proxy of the **Mailbox in Exchange Server** connection type, **Standard authentication with client transmission (SMTP AUTH)** is set here by default.
E-Mail address and **Password**	Here you can specify an email address and a password for authentication with the mail server. For SMTP authentication (SMTP AUTH), the full email address (e.g., user@example.de) must be entered to authorize sending. The password is the same one you use for your email account. The password must be entered in encrypted form. This is done automatically during installation. If incorrect login credentials are entered, an error will occur at runtime.
Adress and **Port**	Here you define the address of the mail proxy and the corresponding port. This configuration must be specified, for example, in the HiCAD PDM Options so that HiCAD PDM can send emails via the mail proxy. **Please note:** Currently, always use Port 25 here, as the port configurable in the HiCAD PDM Options is not evaluated in every part of the program.
Further settings	**Maximum number of emails per minute** The number in the input field specifies the maximum number of emails processed by the HiCAD PDM Mail Proxy per minute. Setting a general limit here can prevent potential overloads. The default value is 30. The minimum number is 10, and the maximum number is 1000. **Number of parallel connections** The possible number of parallel connections defaults to 4, which is also the maximum value. **Number of retries for failed transmissions** The minimum value you can set here is 0 (i.e., no retries are attempted for a failed transmission), and the maximum value is 10. The default value is 3.
Start service upon installation	This option starts the service.

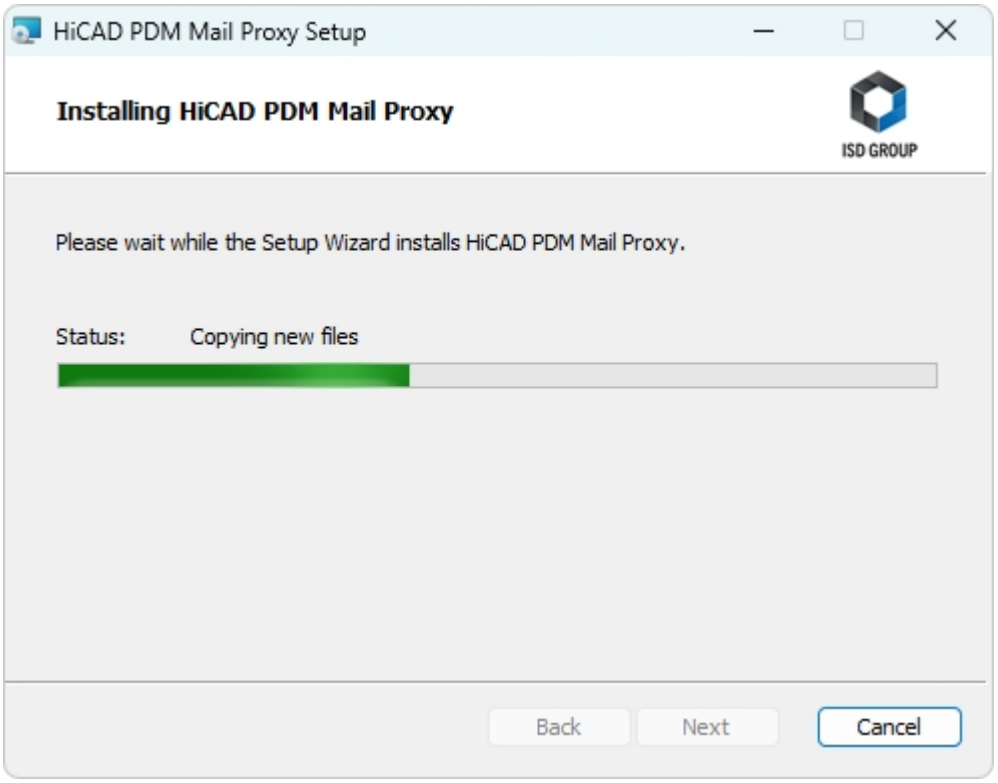
The installation's configuration data is stored in the file

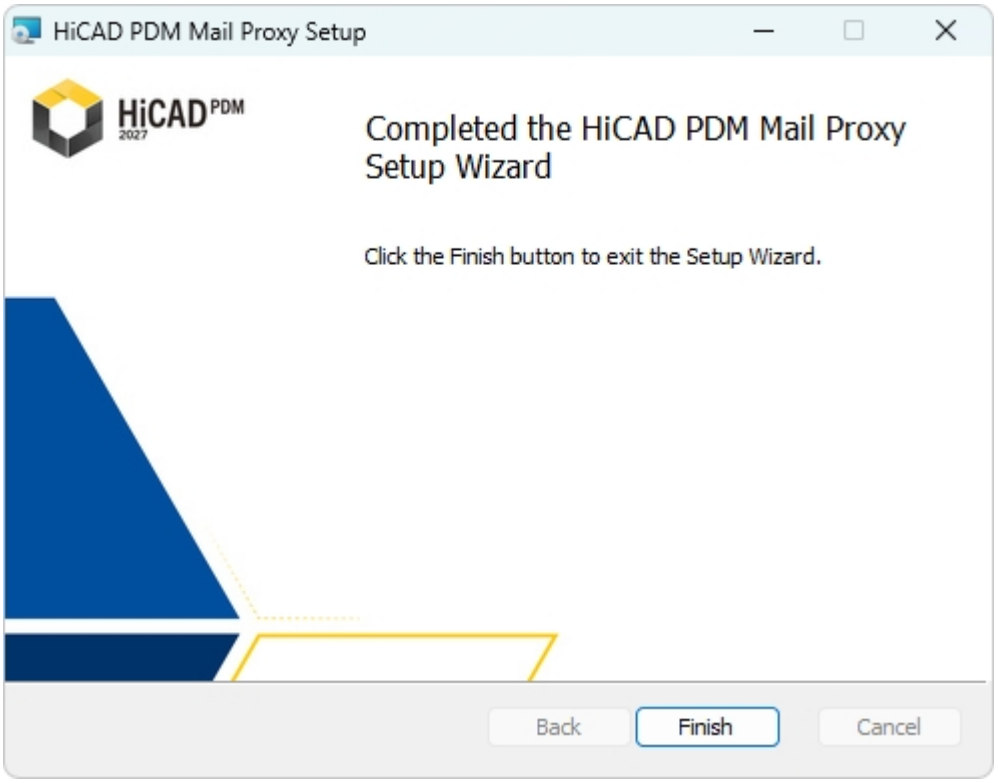
`%ProgramData%\Hicad\Pdm\MailProxy\MailProxy.json`

After entering the data, click **Next** .



Then click **Install**.





Once the installation is complete, the Mail Proxy will start.

Of course, you can also uninstall or modify the Mail Proxy installation at any time.

Password encryption

The file required for authentication with the mail server is always written in encrypted form. The installation does this automatically. If the password needs to be changed manually at a later time (without a change installation)—for example, when using different configuration files for multiple parallel services—the following procedure is recommended:

The ISD Group always uses the following public key in PEM format for encryption:

```
-----BEGIN PUBLIC KEY-----
MIIBIjANBgkqhkiG9w0BAQEFAAOCAQ8AMIIBCgKCAQEA+lUPWrejDiFtglaTUWb4kem
b8oGuC2igkbAsms8AUTaqF8UDouzyGKTxb6tXnKEGo65viIwD9yPpzlV/Fycibpt83k
JdmIATsob1MyKo05qmA0QdKFP9OdfCymPO6vqUebUtTvMzj5SVjKpJvkgyQ0Sr32L+8
SiWwTP5usxp0jv3lfzT8QuLErwTlWexI9Bgbuh3U9vsdO0QdKIqjTNn3AtCrVfoVGr8
Vu7Rrk5CHax/p6TET7w9GMnbFopf09STxZYykUiIrA4a1s8Tgd255n3tUD7umQtq/QL
frFzRmlGxZnQymPGjbHr0nbNXxLhsURXMazjw6PYPWRkyDz1abwIDAQAB
-----END PUBLIC KEY-----
```

There are various tools and websites that allow you to encrypt text using a public key. The following explains how to use OpenSSL, as this is a well-established tool for handling encryption.

1. Install OpenSSL.
2. Generate a PEM file from the public key specified above, e.g., passkey.pem.
3. Then save the password to be encrypted in a text file, e.g., passkey.txt.

4. Generate the encrypted password using the following command line:
   `openssl pkeyutl -encrypt -pubin -in passkey.txt -inkey passkey.pem -out passkey.bin`
   The encrypted password is saved as the file passkey.bin.
5. In the next step, the encrypted password is converted to Base64 format using the following command line:
   `openssl enc -in passkey.bin -out passkey.base64 -a -A`
6. You can then copy the contents of the Base64 file into the JSON file as the password.

How MailProxy.exe works

Command-line parameters

The Mail Proxy runs in administrator mode and currently supports one command-line parameter:

`--file | -file <Konfigurationsdatei>`	This parameter allows you to specify a configuration file. You must provide the full path, including the filename and extension. If the specified file does not exist, the Mail Proxy creates a (non-functional) default configuration file, which must then be further configured.

The parameter is optional. If the path to the configuration file is not specified, the Mail Proxy uses the default:

```
%ProgramData%\Hicad\Pdm\MailProxy\MailProxy.json
```

Service mode

The Mail Proxy can also be run as a service. Setup can be performed manually, for example, as follows (adjust parameters as needed):

```
sc.exe create HicadPdmMailProxy start= auto displayname= "HiCAD PDM Mail
Proxy" binpath= "\"D:\Install\MailProxy\MailProxy.exe\"
--file \"%ProgramData%\Hicad\Pdm\MailProxy\
MailProxy.json\""
```

```
sc.exe description HicadPdmMailProxy "Mail Proxy that allows emails to be sent
from HiCAD PDM centrally via a service."
```

By assigning a separate configuration file to each service, it is possible to run an installed Mail Proxy with multiple parallel services. This can be useful, for example, if different connectors of the mail server need to be addressed. In this case, you must ensure that the specified ports do not conflict.

Testing email delivery

After starting the Mail Proxy, you can test email delivery. To do this, start PowerShell as an administrator and enter the following command, for example:

```
Send-MailMessage -To "Ihre@Mailadresse.com" -From "test@localhost"
-Subject "Test Mail Proxy" -Body "HiCAD PDM Mail Proxy is working ..."
-SmtpServer "localhost" -Port 25
```

For further information on the general functionality of the HiCAD PDM Mail Proxy and its underlying folder structure, please refer to the HiCAD PDM Online Help.

Please note:

Change installation: If the email address is changed during a change installation, you must also re-enter the password or, in the case of modern authentication using OAuth2, the three IDs from the Microsoft Entra Admin Center.

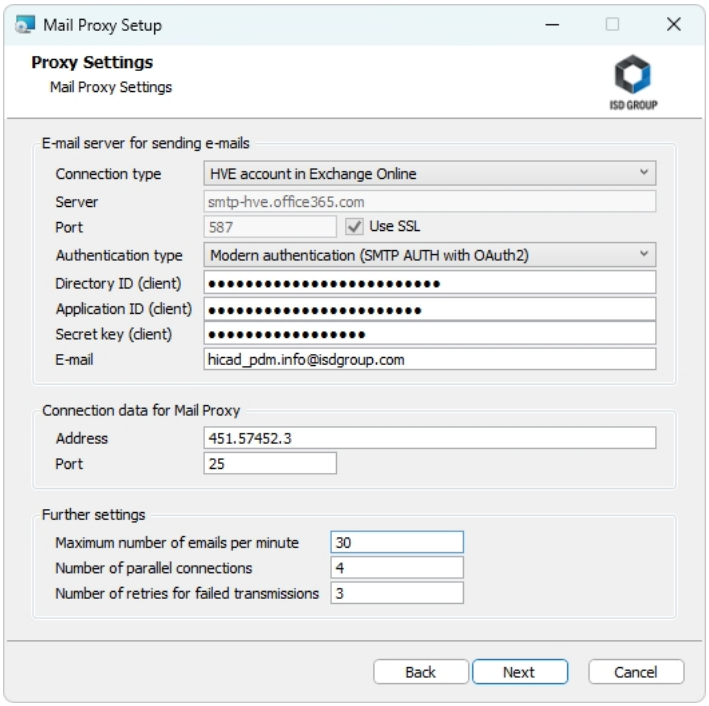
Note on update installations

Some of the tools and components of HiCAD and HiCAD PDM that need to be installed separately are first uninstalled during updates and then reinstalled.

If errors occur or the installation is interrupted, the old version will be restored.

Installing the HiCAD PDM Mail Proxy With HVE Account in Exchange Online

When installing the mail proxy, you have the option of selecting the HVE account connection type in Exchange Online. Once selected, the settings options are as follows.



Connection type

The setting **HVE account in Exchange Online** allows the mail proxy to be interfaced with Exchange Online. The **Server**, **Port** and **SSL** settings are automatically set here, as they are predefined by Microsoft.

For sending emails via Mail Proxy, only HVE accounts (high-volume email) are currently supported for Exchange Online. In order for these to be configured for sending emails, a corresponding HVE account must first be added in Exchange Online. During configuration, a password must be assigned in addition to the display name and email address.

HVE accounts can be used for internal mail delivery. External mail delivery is not possible, but this is often not the use case for the HiCAD PDM Mail Proxy. A maximum of 50 recipients can be specified per message.

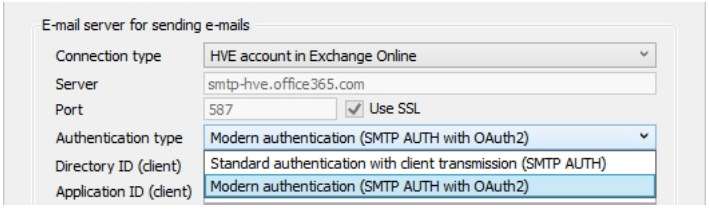
You do not need an Office licence to operate this connection type.

Please note:

The settings for the connection type **Mailbox in Exchange Server** can be found here.

Authentification type

If you set up a mail proxy of the connection type **HVE account in Exchange Online**, you have the following options in the **Authentication type** pull-down menu:



Standard authentication with client transmission (SMTP AUTH)

With this type of authentication, you must specify the email address and password of the HVE account.

Important:

Standard authentication with client transmission (SMTP AUTH) is disabled by default by Microsoft in Exchange Online. Modern authentication (see below) is generally recommended. However, this does not affect HVE accounts, which is why we support both authentication options for HVE accounts::

HVE accounts are also operational when `SMTPClientAuthenticationDisabled` is set to `True` in `TransportConfig`, as the custom end point is used.

Modern authentication (SMTP AUTH with OAuth2)

To use modern authentication, first register an app in Microsoft Entra (see App registration in the Microsoft Entra Admin Center).

Then copy the **Directory ID (Tenant)**, **Application ID (Client)** and **Secret key (Client)** into the corresponding fields in the installation dialogue (which are only visible if **Modern Authentication (SMTP AUTH with OAuth2)** has been selected above).

The previously saved value of the created secret client key must be copied into the **Secret Key (Client)** field

Address and **Port**

Here you define the address of the mail proxy and the associated port. This configuration must be specified in the HiCAD PDM options, for example, so that HiCAD PDM sends emails via the mail proxy.

Please note:

Always use port 25 here, as the port that can be set in the options is not evaluated at every point in the program..

Further settings

Maximum number of emails per minute

The number entered in the field specifies the maximum number of emails that the HiCAD PDM Mail Proxy can process per minute. Setting a general limit here can help prevent potential overloads. The default value is 30. The minimum value is 10, and the maximum value is 1000..

Number of parallel connections

The possible number of parallel connections defaults to 4, which is also the maximum value..

Number of retries for failed transmissions

The minimum value you can set here is 0. This means that, following a failed delivery attempt, no retry will be attempted. The maximum value is 10; the default value is 3.

Start service upon installation

This option starts the service.

This setting is only available for **Standard authentication with client transmission (SMTP AUTH)**, not for **Modern authentication (SMTP AUTH with OAuth2)**.

The configured installation data is stored in the file

```
%ProgramData%\Hicad\Pdm\MailProxy\MailProxy.json
```

After you have entered the data, click the **Next** button and then start the installation with the **Install** button.

Testing mail delivery via HVE accounts

To test the basic functionality for mail delivery via HVE accounts, you can run a Powershell script as shown in the following example:

To test the basic functionality for mail delivery via HVE accounts, you can run a Powershell script. Here is an example:

```
Connect-ExchangeOnline -UserPrincipalName yourname@isdgroup.com
```

```
$credentials = Get-Credential -UserName "hveaccount@isdgroup.com" -Message "Enter sender credentials"
```

```
Send-MailMessage -From "hveaccount@isdgroup.com" -To "your-name@isdgroup.com" -Subject "Test HVE" -Body "HVE Mailing is working ..." -SmtpServer "smtp-hve.office365.com" -Port 587 -UseSsl -Credential $credentials
```

Please note:

Change installation: If the email address is changed during a modification installation, you must also re-enter the password or, in the case of modern authentication with OAuth2, the 3 IDs from the Microsoft Entra Admin Centre.

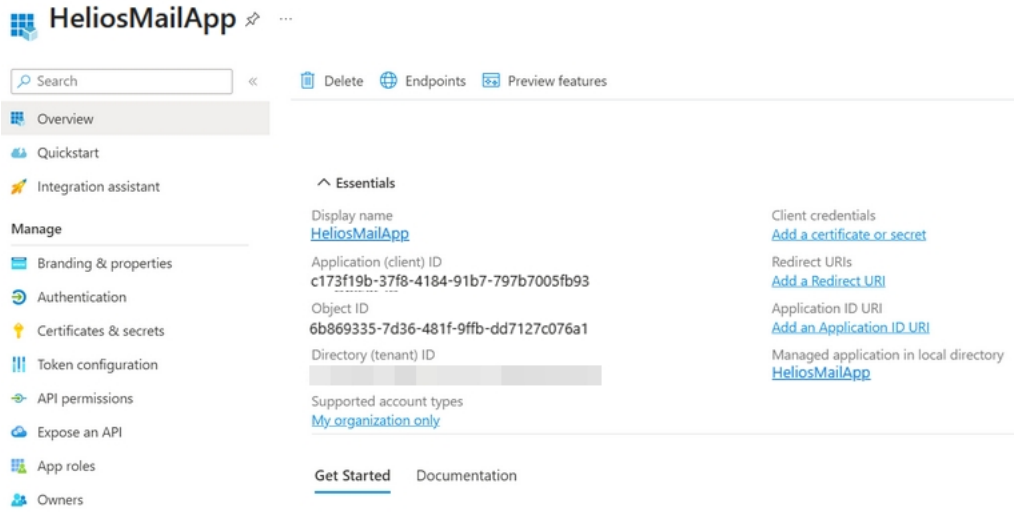
App Registration in the Microsoft Entra Admin Center

To set up an app in the **Microsoft Entra Admin Centre**, always follow the relevant instructions from Microsoft.

Here is an example based on the current configuration options in Entra:

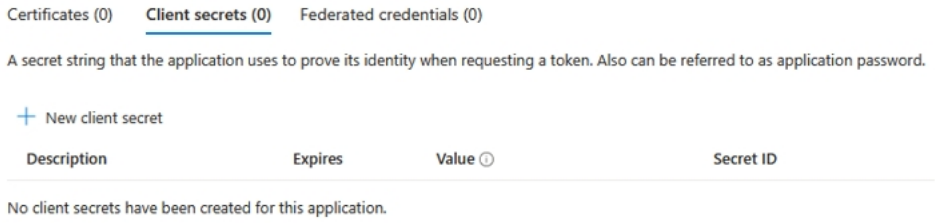
- In the **App registrations** section, select the **New registration**.
- Enter a suitable name for the app, e.g. **HeliosMailApp**.
- Under **Supported account types**, you should generally select **Accounts in this organisational directory only**.
- A **Redirect URI** does not need to be specified.

The corresponding page for the app is then displayed:



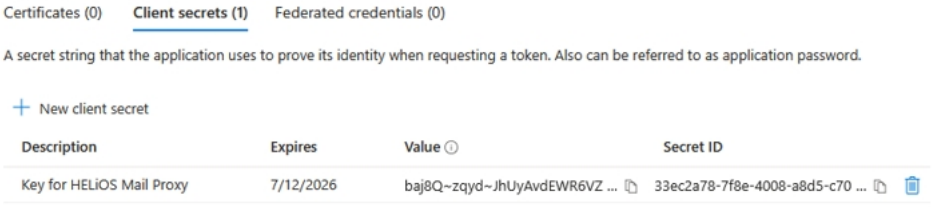
- Select **Certificates & secret**.

Currently, only **Client secrets** are supported for communication between the Mail Proxy and Exchange Online (certificate security is not yet supported). Therefore, the **New client secret** function must be selected:

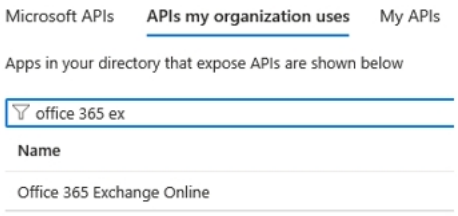


- Select a **Description** for the key and a validity period (**Expires**). Then click **Add**.

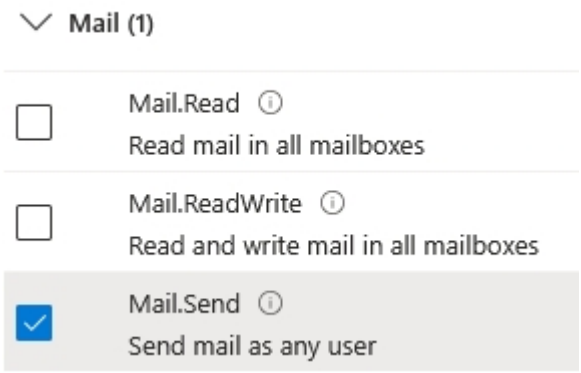
The result will look like this:



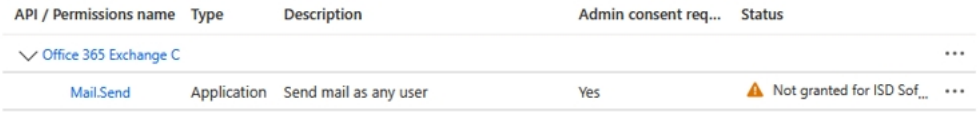
- At this point, copy the **Value** of the newly created client secret.
- Then go to the API Permissions menu item and add a new permission there.
  - To do this, first select **Office 365 Exchange Online** as the API..



  - Select **Application permission** (not Delegated permission) as the **Type**.
  - Then select the right **Mail.Send** in the **Mail** area and click **Add permissions**:



The result should look something like this:

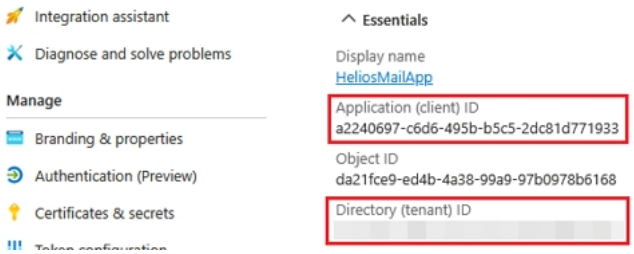


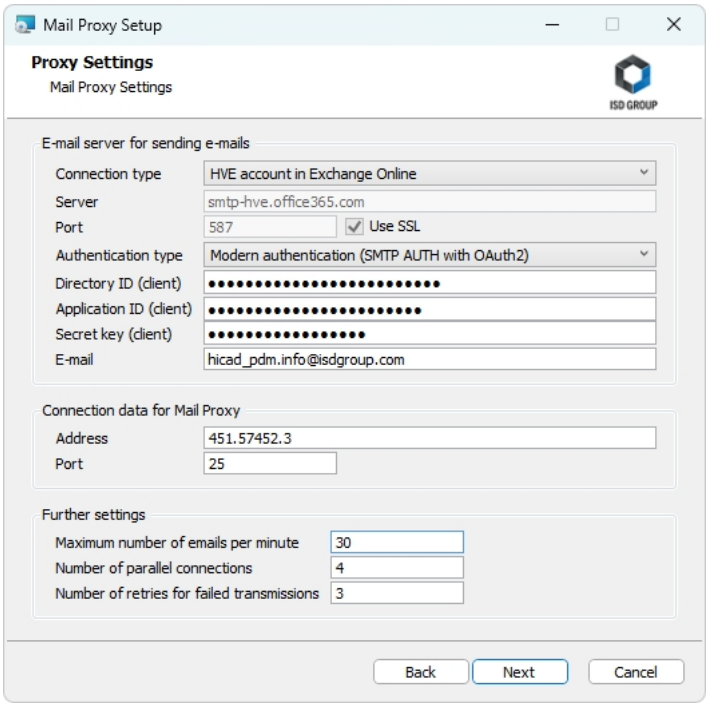
Finally, administrator consent must be granted.

- To do this, click on the **Grant admini consent for ...** button and confirm the request.

Instead of the orange triangle, a green tick should now be visible. This completes the setup of the app.

In the summary, you will see the **Application (client) ID** and **Directory (tenant) ID**, which must be entered in the installation dialogue.



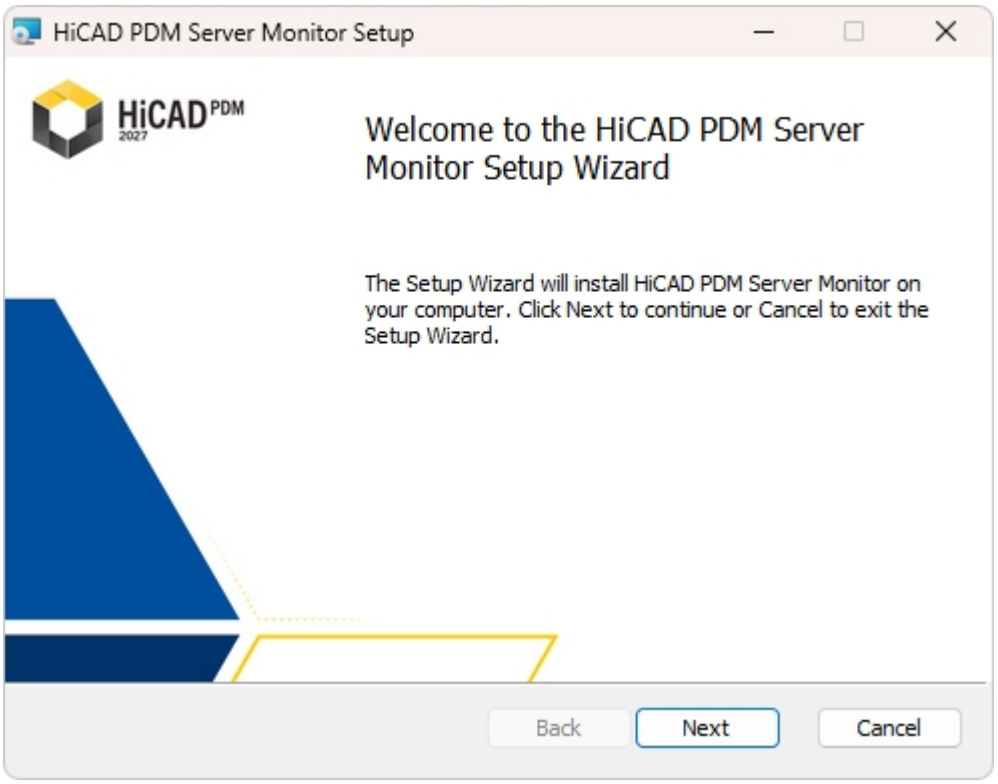


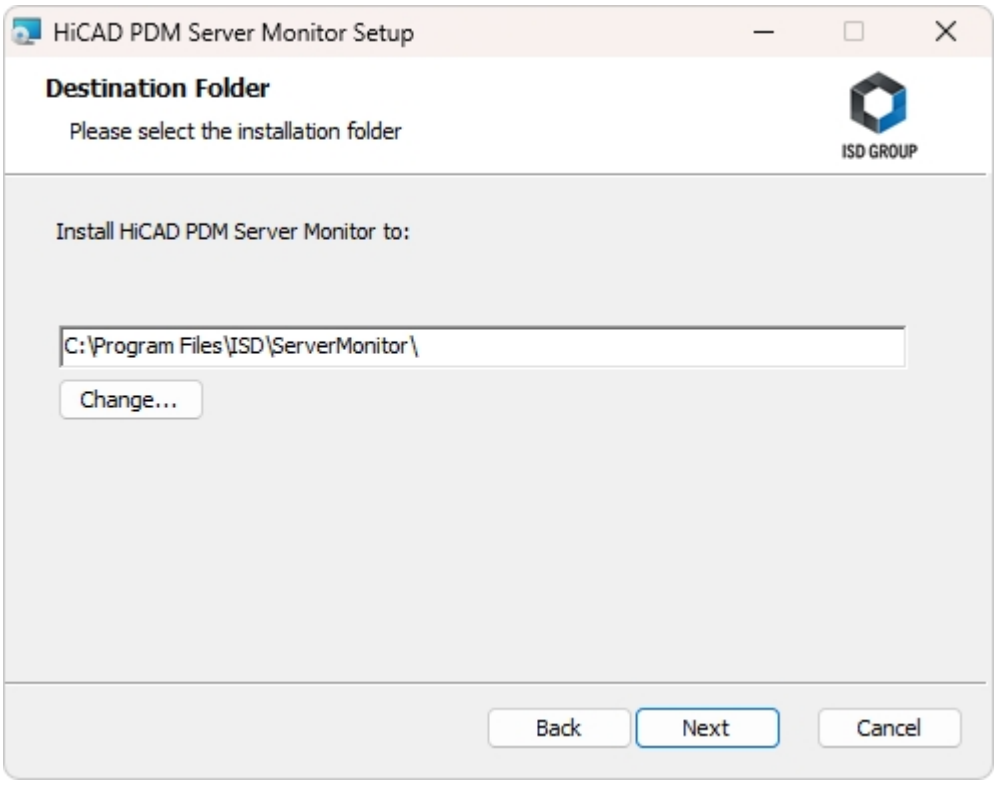
Please note:

Validity of the secret key: Please note that the configured secret keys have an expiry date (**Valid until**). A new secret key must be configured in good time before expiry and the corresponding value must be updated in the Mail Proxy.

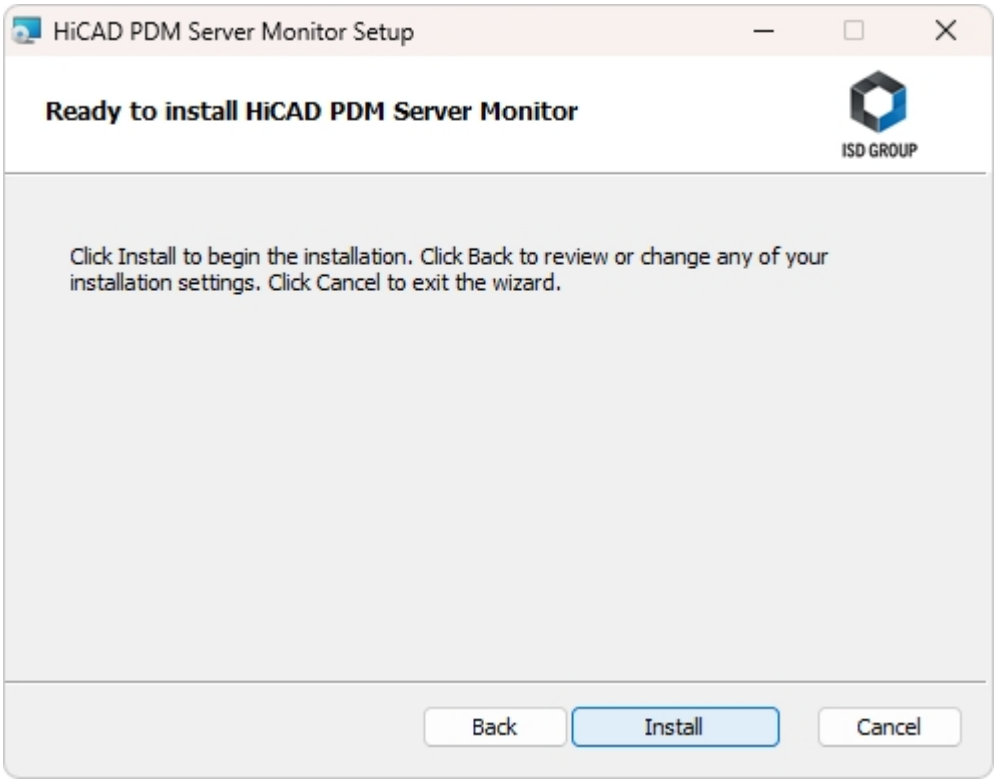
Installing the HiCAD PDM Server Monitor

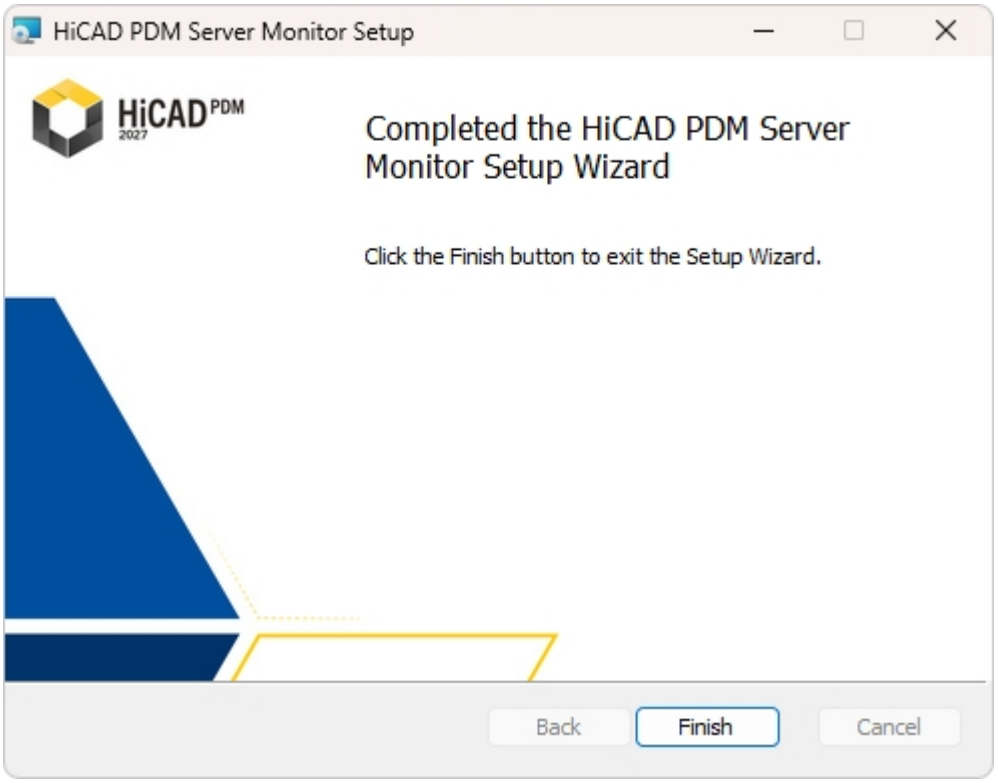
With the **Server Monitor** you have the possibility to monitor the runnability of your HiCAD PDM server applications. You start the installation of the **Server Monitor** by double-clicking the SETUP.EXE file from the **Tools > ServerMonitor** directory of your installation medium.





Specify the installation directory.





After the installation you start the monitoring with a double click on the **ServerMonitor.exe** file (EXE directory). The running monitoring by the Server Monitor is displayed in the Windows notification area.

Note on update installations

Some of the tools and components of HiCAD and HiCAD PDM that need to be installed separately are first uninstalled during updates and then reinstalled.

If errors occur or the installation is interrupted, the old version will be restored.

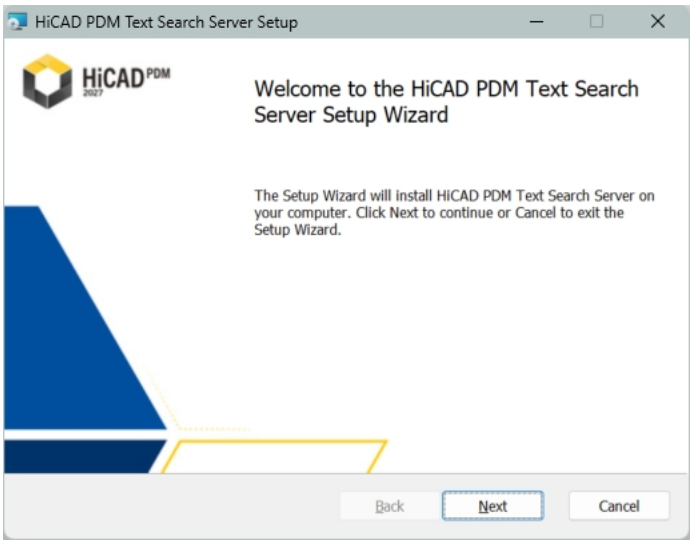
Installing the HiCAD PDM Text Search Server

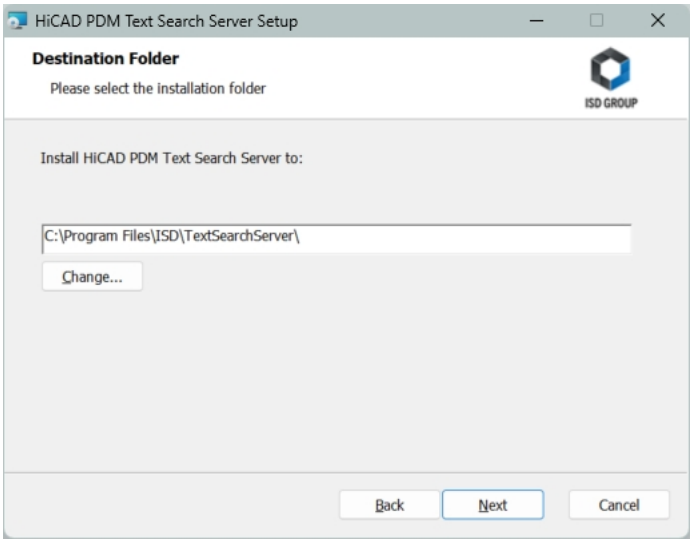
Configuring full-text search on the server side

Please note:
If you use replication and want to use the full-text search, you should contact ISD Consulting.

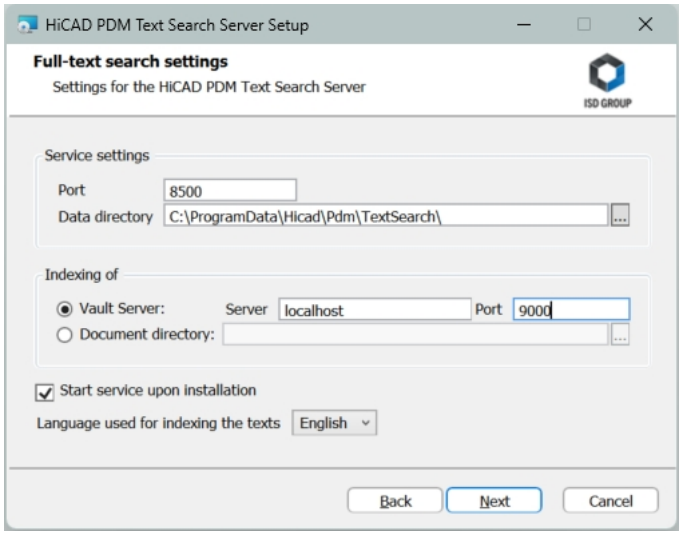
The installation of the full-text search for the server can be found on the HiCAD PDM installation medium at **Tools** > **TextSearchServer**.

Run the **setup.exe** file there.





Specify the **Destination Folder** for the software installation and confirm with **Next**.



In the **Settings**, enter the **Port** number under Port that will be used for subsequent communication between the client and the server for full-text search. HiCAD PDM suggests 8500 as the default.

The full-text search stores the internal data it needs for administration in the **Data directory**. You can change this directory by clicking on **...** .

Below Indexing of you need to select and configure one of the following options:

Vault Server

In this case, full-text search indexing is performed via an existing **HiCAD PDM Vault Server**.

The relevant information must be entered in the input fields for the **Server** (Server name/Address) and the **Port**.

Please note:

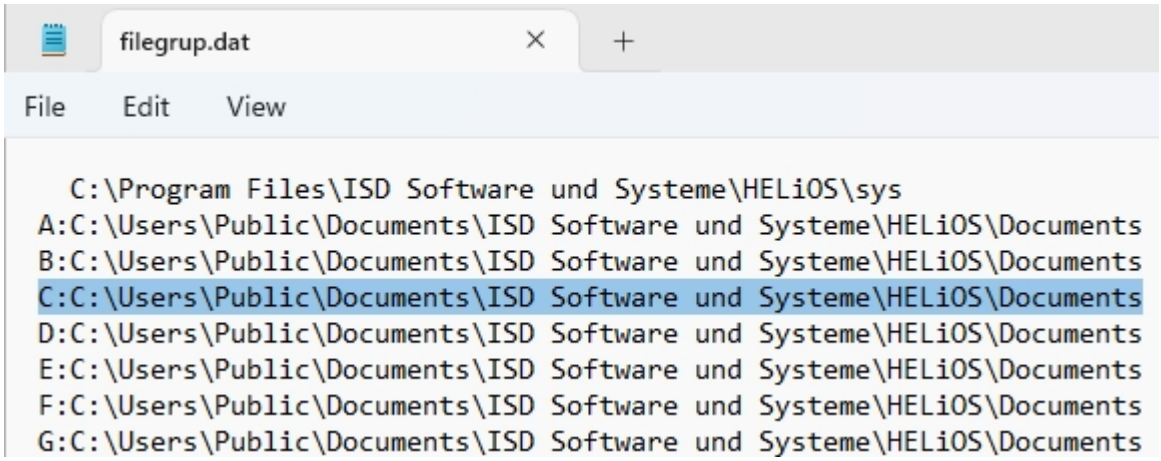
To ensure that all relevant files can be indexed by the full-text search, it is important that the full-text search server has access to the central file storage. For Vault Server operation, this means access to the central vault (if several are in use).

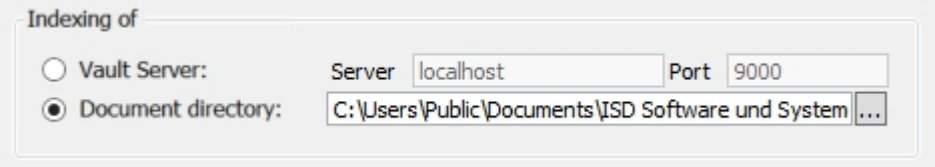
The corresponding HiCAD PDM Vault Server does not necessarily have to be installed on the same system on which the full-text search is installed (in this case, the **Server** specification during installation is different from "localhost").

Document directory

Alternatively, a document directory can also be used.

When working without a Vault Server, the HiCAD PDM document directory used by the clients must be entered here. To do this, either click on the icon with the three dots or enter the path from the system file FILEGRUP.DAT (row C:) manually.



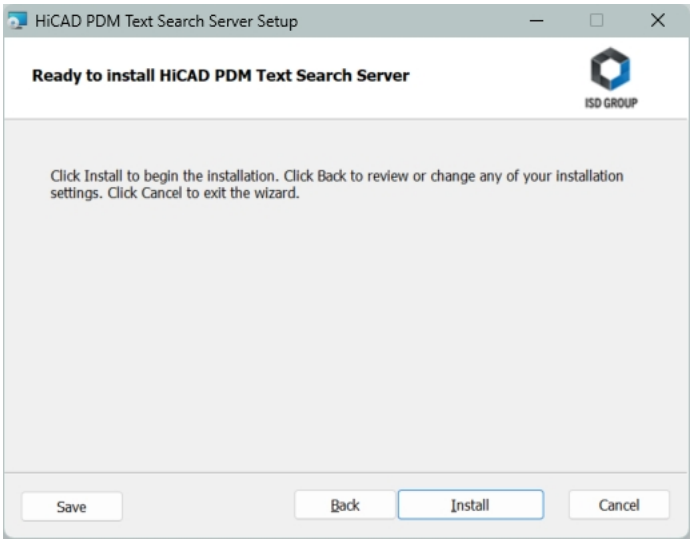


The installation checks whether the specified path exists.

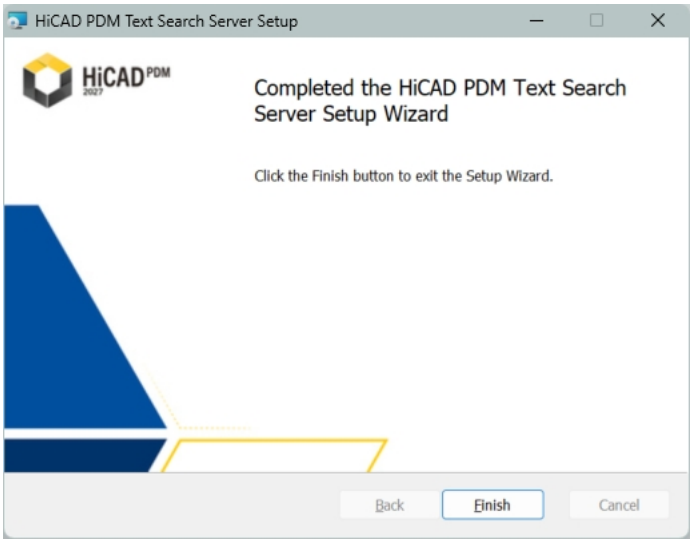
The active checkbox **Start service upon installation** ensures that the full-text search starts immediately after the installation is complete. This means that it no longer needs to be started manually.

The full-text search also depends on the language for indexing words, which can also be set during installation. To do this, select the appropriate language from the pull-down menu next to **Language used for indexing texts**.

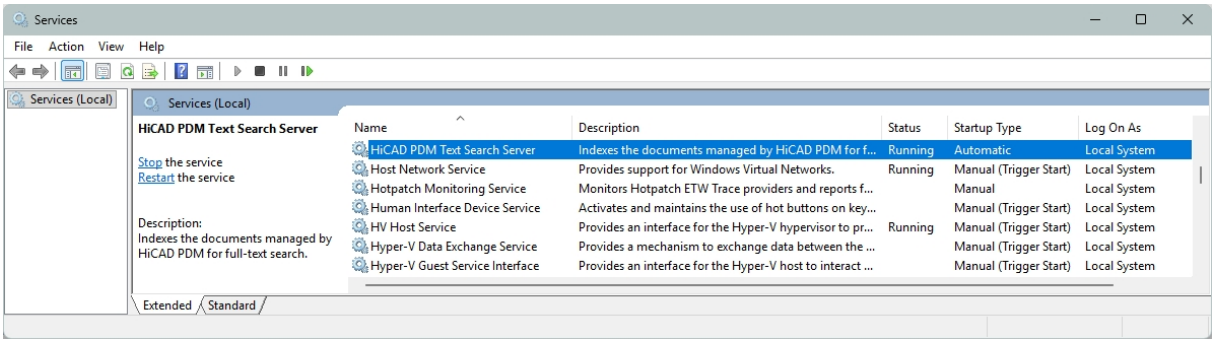
Exit the window by clicking **Next**.



Click on **Install**.



A progress bar will be displayed during installation. Then click **Finish** to complete the server-side installation of the HiCAD PDM full-text search.



After installation, the **HiCAD PDM Text Search Server** will be displayed as a local system in Services (Control Panel > Windows Tools > Services).

Please note:

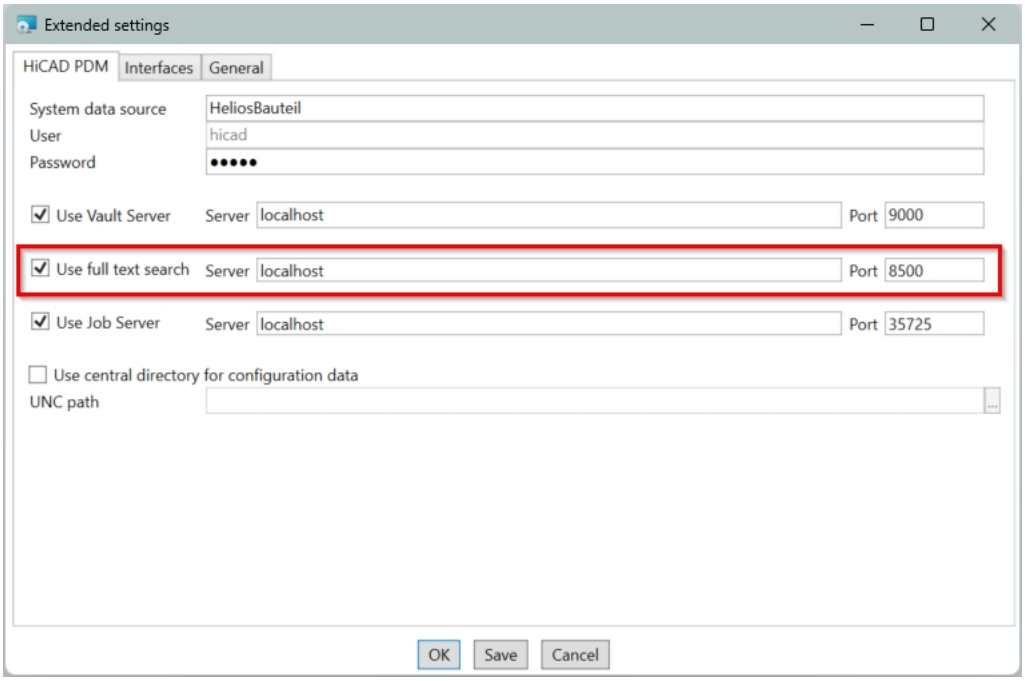
- For communication between clients and the full-text search server, it may also be necessary to configure a firewall rule (incoming rule) (e.g. analogous to the Vault Server).
- You cannot run different HiCAD PDM full-text search server applications in parallel on one computer.
- If the configured language is not supported, the full-text search will terminate upon start-up. German, English, French and Italian are supported.
- Notes on operation with different databases:

In principle, you can connect HiCAD PDM clients that work with different databases to one and the same Vault Server.

Since the full-text search server indexes the contents of the Vault Server and always works in the context of a specific database when processing queries (so as not to find any documents that are not entered in the database), the full-text search server organises itself in the configured data directory in such a way that the database ID is used as the folder structure.

Configuring full-text search on the client side

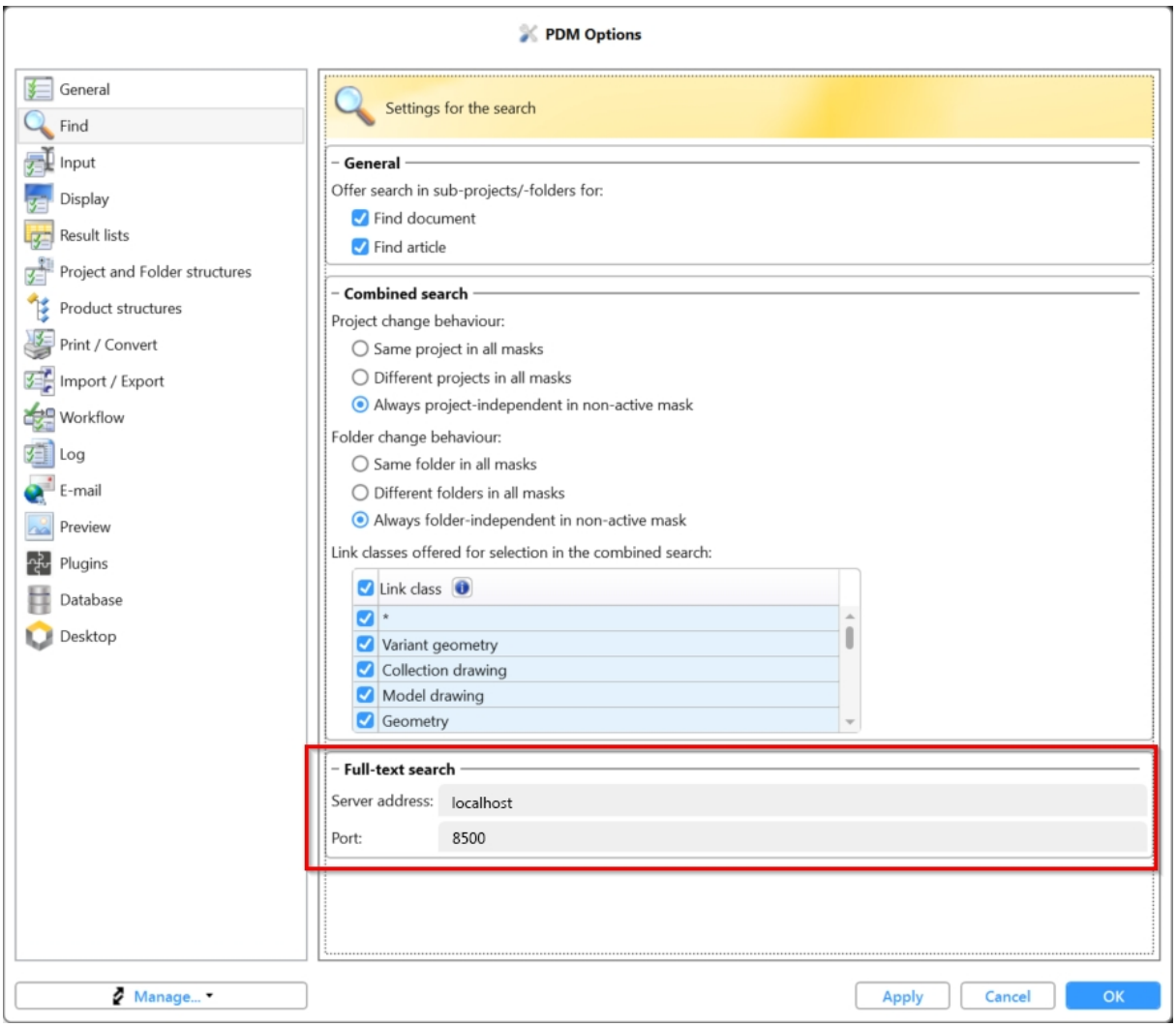
When installing, updating or modifying HiCAD PDM Desktop on a client system, you can configure the full-text search server in the **Extended settings** dialogue, on the **HiCAD PDM** tab.



After activating the **Use full-text search** checkbox, the default port suggested by HiCAD PDM is automatically entered in the **Port** input field. If this differs from your settings, you must change the entry accordingly.

When using a Vault Server, the server names of the Vault Server and full-text search server may differ here.

After completing the HiCAD PDM installation and successfully setting up full-text search, you can view the settings in HiCAD PDM Desktop via **HiCAD PDM Options > Find > Full-text search**.

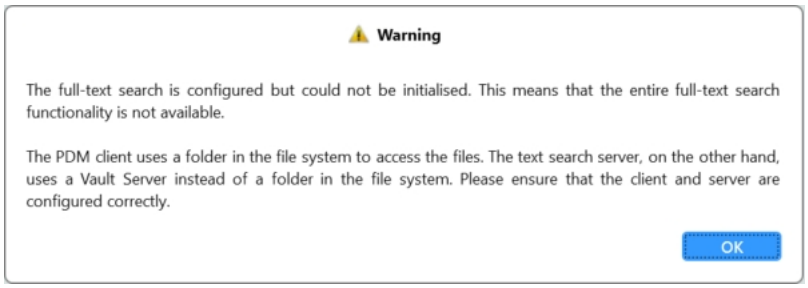


Please note:

- The Client and Server for full-text search currently require the same MR.SP version. If this is not available, you will receive a corresponding error message when starting HiCAD PDM on the Client side.

- If full-text search is enabled for a HiCAD PDM Client, HiCAD PDM checks when the client is started whether it is accessing the same database as the Full-text search server.

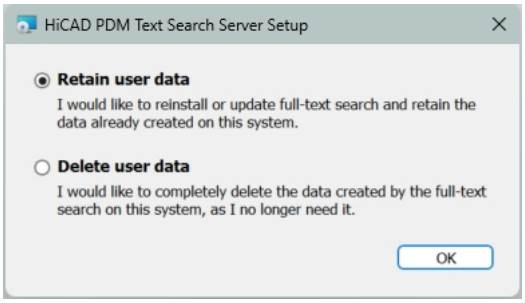
  If the client and server are configured differently, a corresponding error message is displayed, e.g.:



- Further information, e.g. on setting up full-text search on the Client side, can be found in the HiCAD PDM Online Help.

Notes on uninstalling full-text search

When uninstalling full-text search on your system, a query will first appear asking whether you want to keep or delete the user data created by the full-text search.



If you wish to reinstall the full-text search, it is advisable to choose **Retain user data** in order to keep the user data already created by the full-text search. However, if this data is no longer required, you can also choose **Delete user data** in the query and confirm with **OK**.

Note on update installations

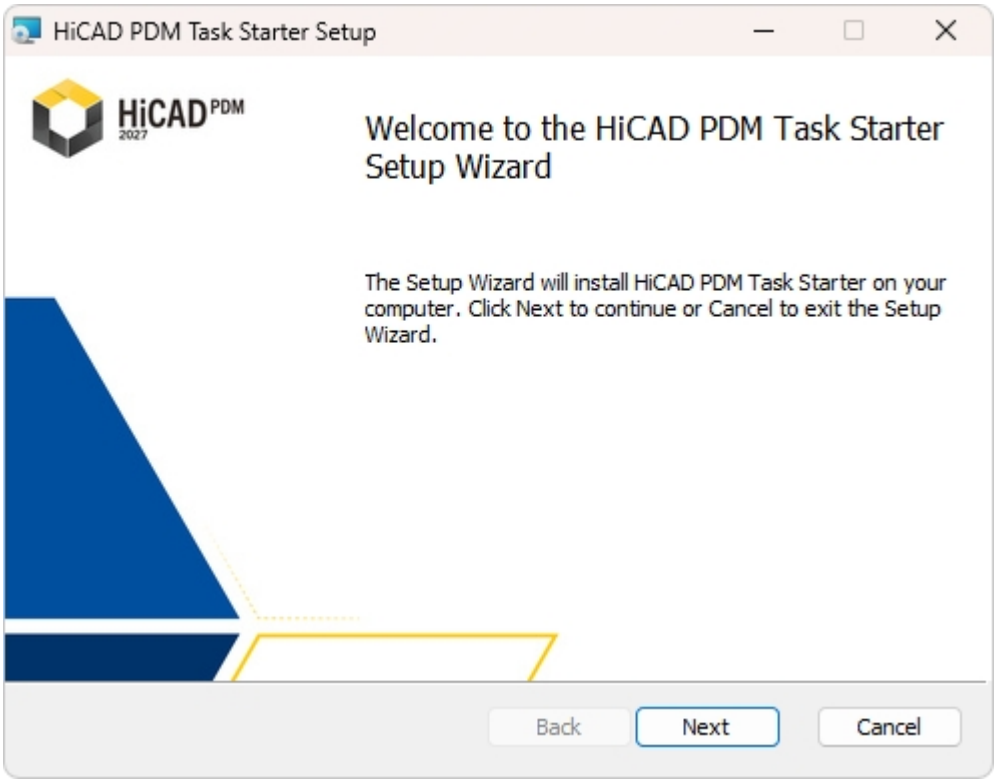
Some of the tools and components of HiCAD and HiCAD PDM that need to be installed separately are first uninstalled during updates and then reinstalled.

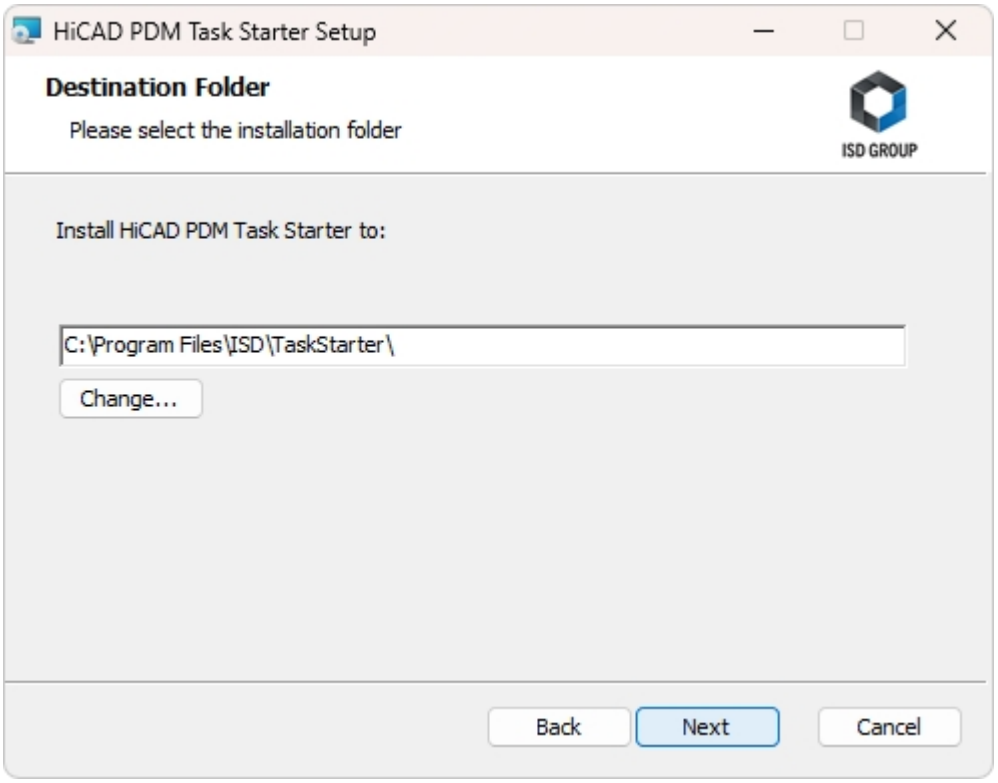
If errors occur or the installation is interrupted, the old version will be restored.

Installing the HiCAD PDM Task Starter

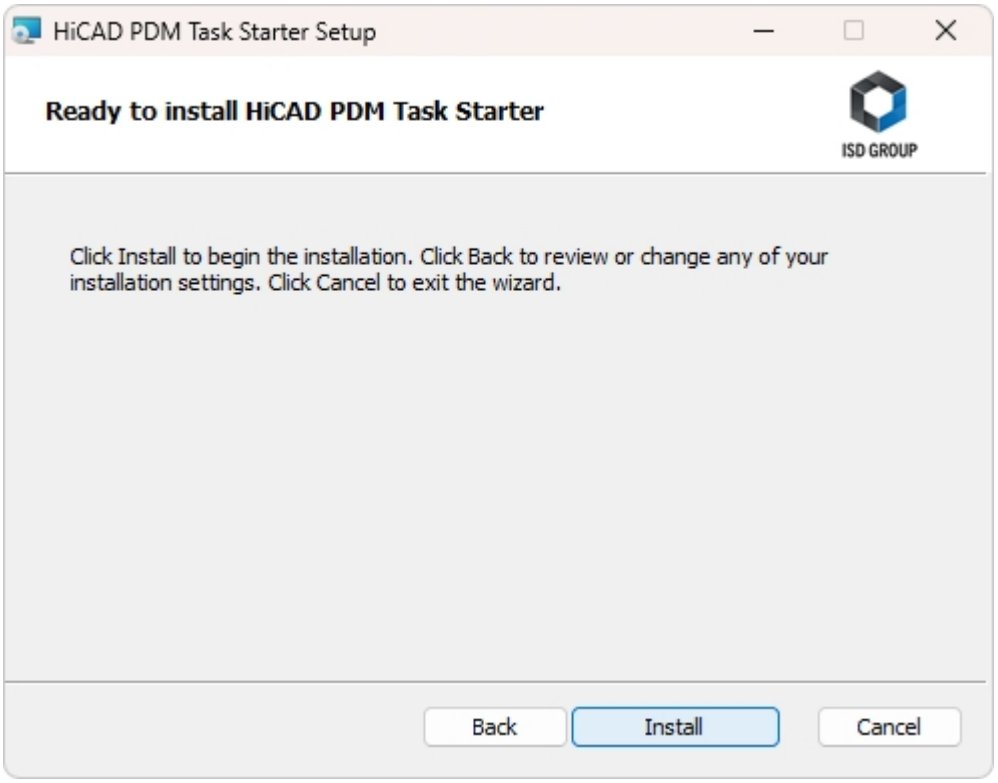
The **HiCAD PDM Task Starter** is a tool with which HiCAD PDM services such as the Job Server can be automatically restarted after termination or after a crash (e.g. due to interruption of the database connection or network access).

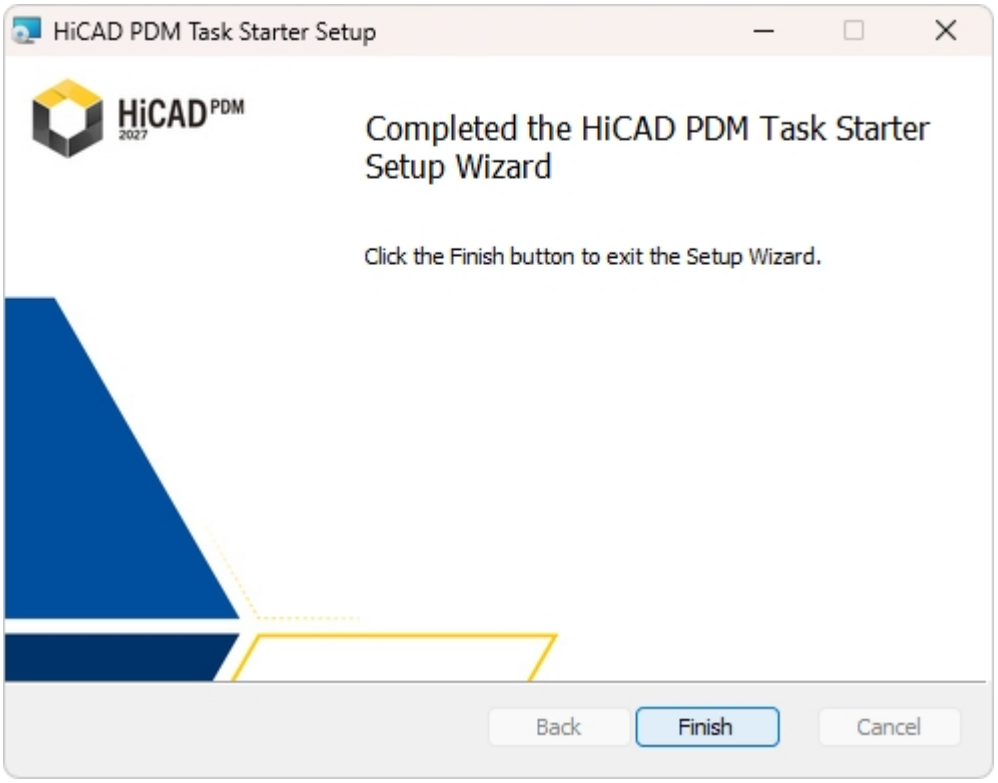
You start the installation of the **HiCAD PDM Task Starter** with a double click on the file SETUP.EXE from the directory **Tools > TaskStarter** of your installation medium.





Specify the installation directory.





After the installation, the **HiCAD PDM Task Starter** must be configured (see HiCAD PDM online help). To do this, edit the file **TaskStarter.config** (%ProgramData%\Hicad\Pdm\TaskStarter\). Then enter the service in the Windows task scheduler. If you have any questions, please contact the ISD Consulting team.

Note on update installations

Some of the tools and components of HiCAD and HiCAD PDM that need to be installed separately are first uninstalled during updates and then reinstalled.

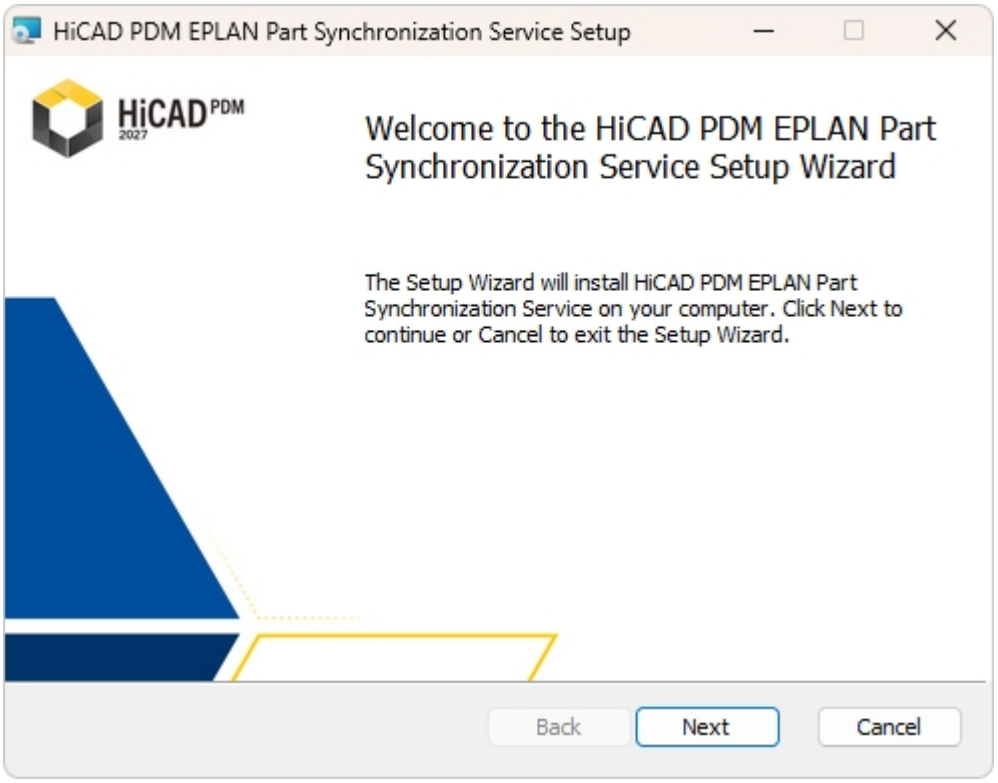
If errors occur or the installation is interrupted, the old version will be restored.

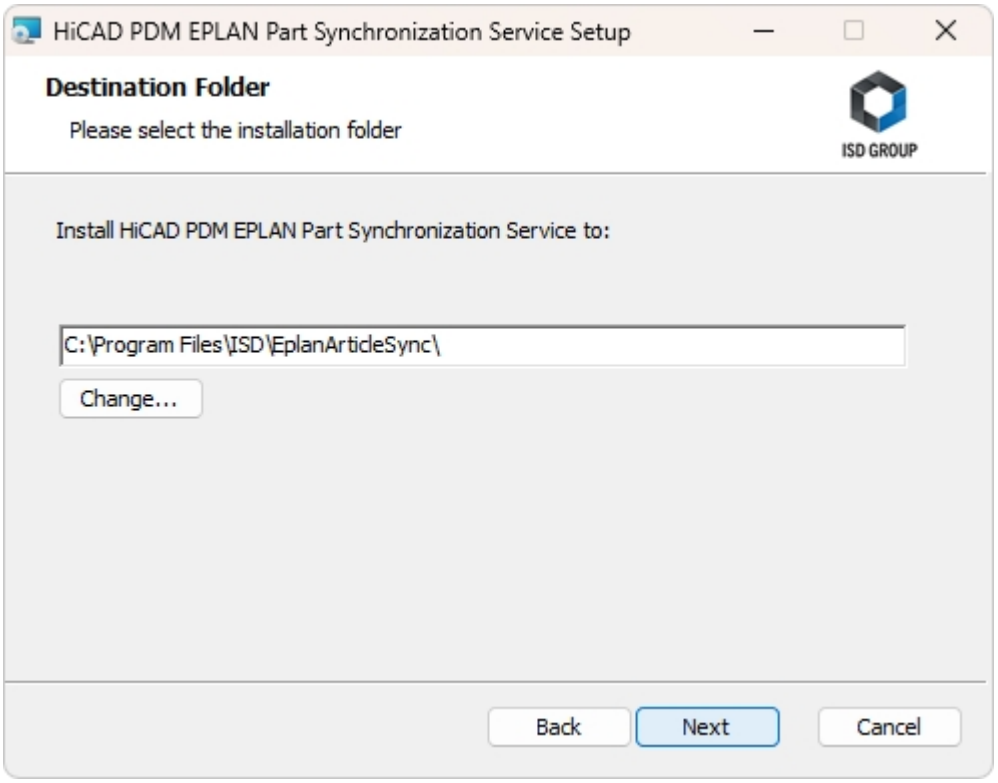
Installing the HiCAD PDM EPLAN Article Synchronisation Service

In addition to the interface (e.g. from EPLAN), which you activate during the installation of HiCAD PDM in the **HiCAD PDM Interfaces** tab of the **Extended settings** window, the **EPLAN Article Synchronisation Service** running separately in the system must also be installed. This service synchronizes the part information from EPLAN, for example, with the HiCAD PDM part masters. In both systems the article number of the respective other system is stored so that the connection between EPLAN article and HiCAD PDM article can be established at any time. You will find the HiCAD PDM EPLAN Article Synchronisation Service installation on the installation media at ..\Tools\EplanArticleSync.

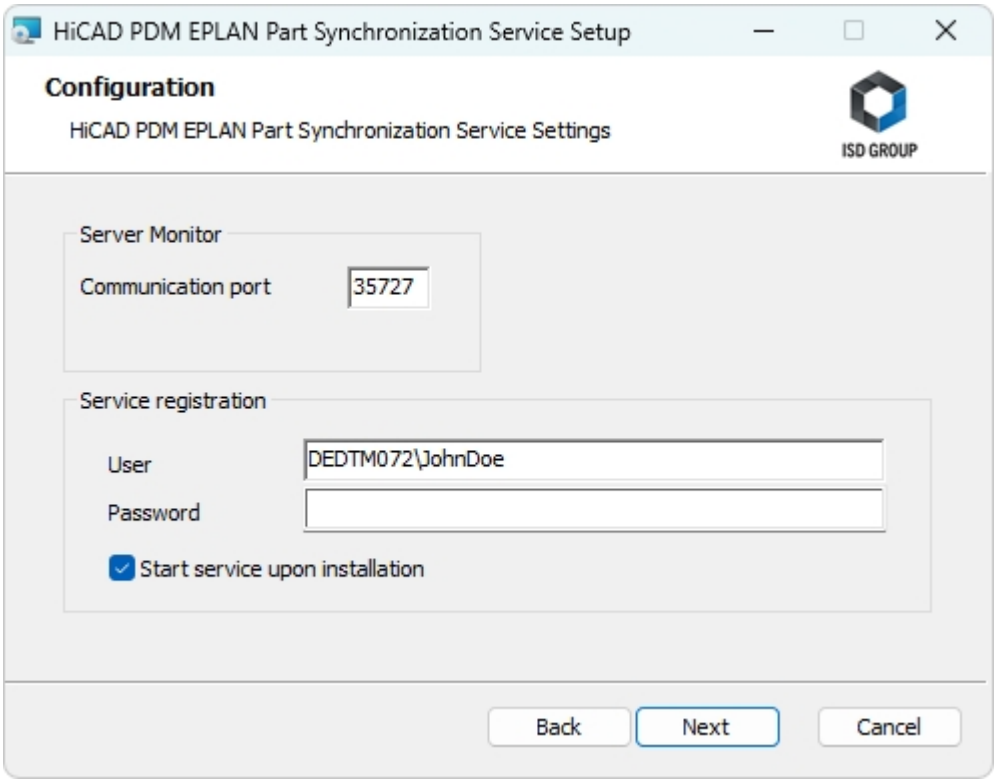
Please note:
For the configuration of the HiCAD PDM-EPLAN interface please contact the ISD Consulting team.

To install Article Synchronisation, start Windows. If Windows is already running, close all other applications and run setup.exe from the **Tools > EplanArticleSync** folder on the installation medium.





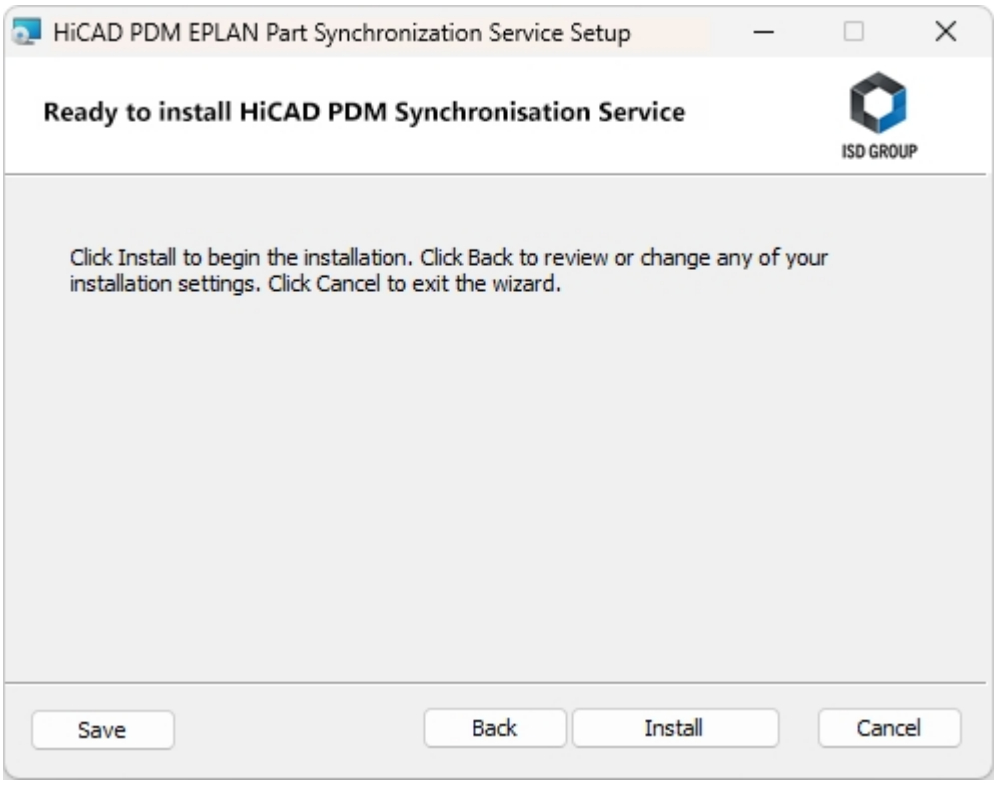
Specify the installation directory for the software.



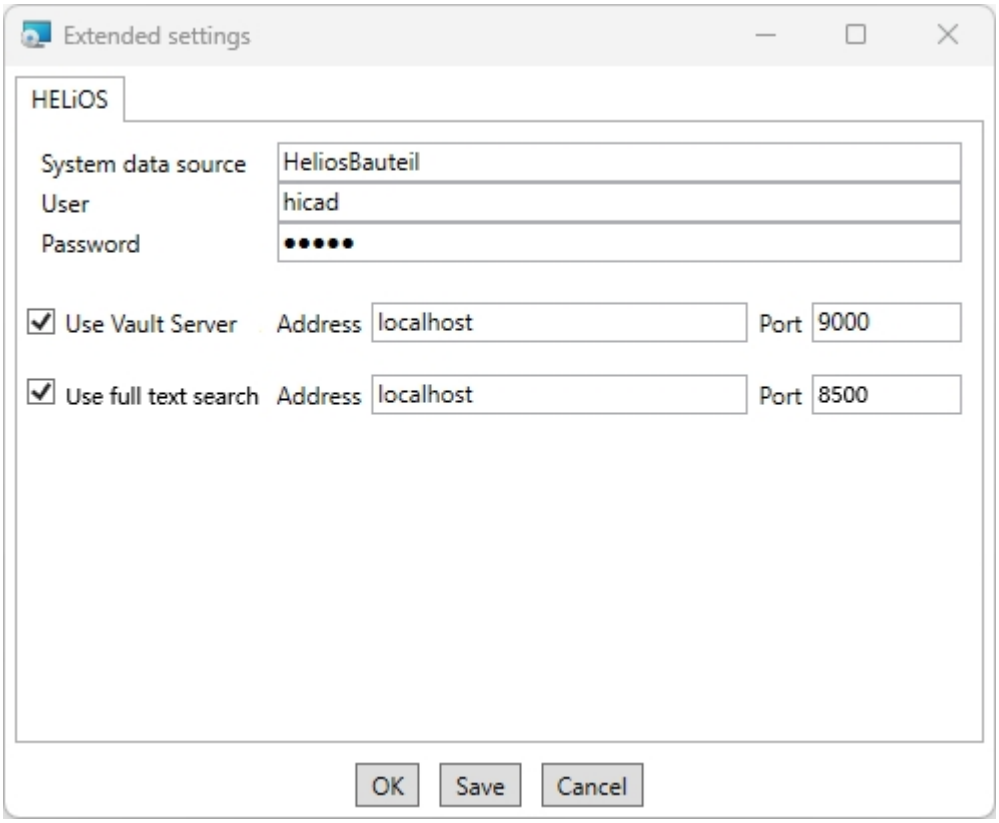
The Server Monitor uses the **Communication port** 35727. If this is occupied by another application, you can change the communication port here.

Choose the interfaced program and, in the **User** field, enter the User login for HiCAD PDM, (or a user account) with access to HiCAD PDM.

Please also note the following regarding update installations: You may need to re-enter the service account password. When you click Next or Update in the dialogue window (or, in the case of a silent installation, as documented in the log), the password is then verified. If the verification cannot be carried out (e.g. if network logon is prohibited by policy, no domain controller is accessible, etc.), a warning will be displayed. If an incorrect Windows username or password is entered for the service account, a message such as the following appears: “Login with the service account <server name\username> failed: The user name or password is incorrect.”

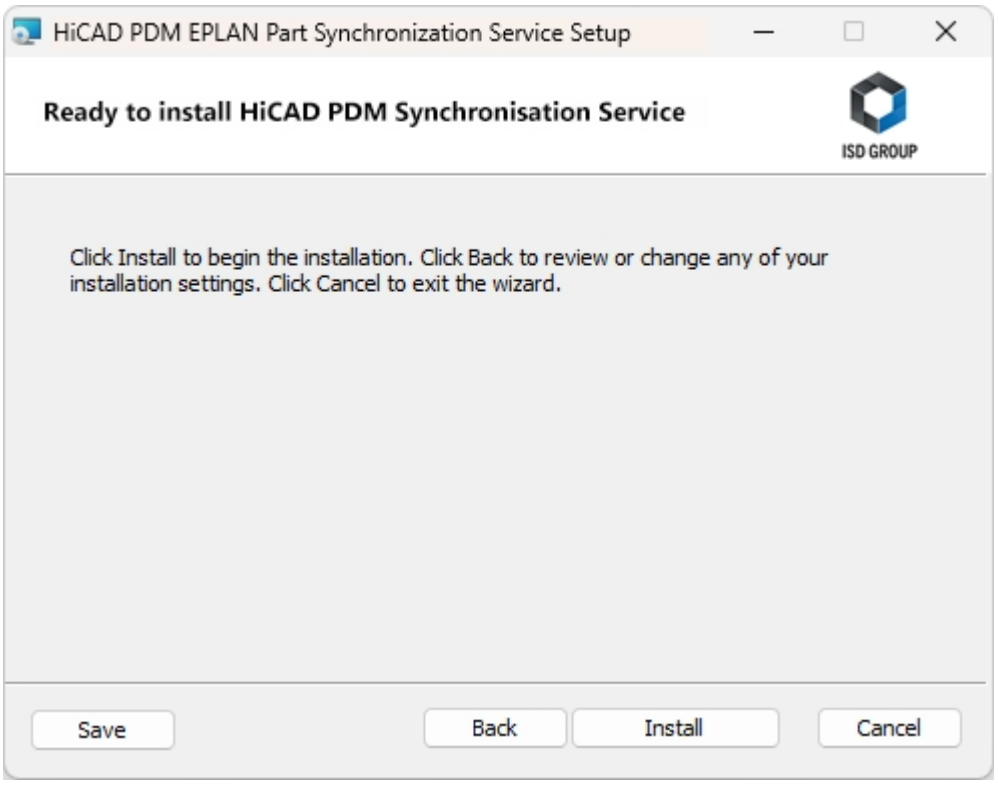


You can now begin with the installation or modify the **Extended settings**, e.g. for HiCAD PDM.

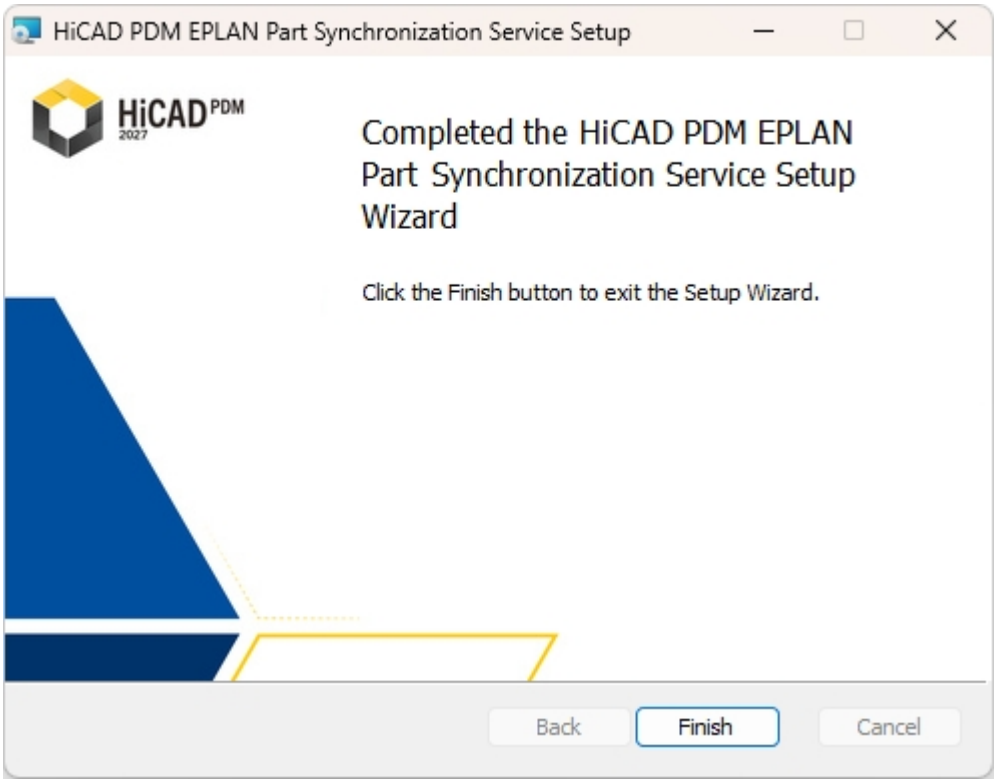


The existing system data source will be suggested. **User** and **Password** are identical to those for the **ODBC login**. If you use a Vault Server, activate the **Vault Server** checkbox. Enter the name of the Server in the **Address** input field, and the Server Port of the Vault Server in the **Port** input field. These can be found at  > HiCAD PDM Options > Database > General > Vault Server .

Click **Save** to store the **Extended settings** in an **.ini file**. Confirm with**OK**.



Click **Install** to start the installation.



After successful installation, the menu of your interface will contain the **Synchronize articles with HiCAD PDM** function in the **PDM** menu.

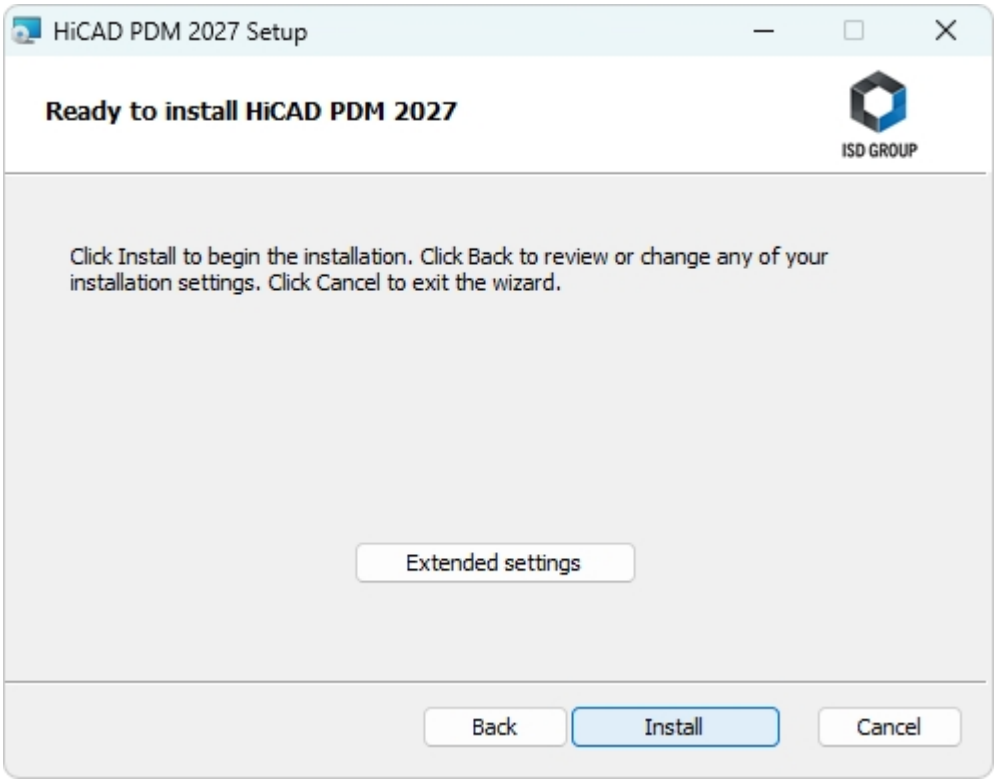
To configure settings for managing the service and directories, the **HiCAD PDM Configuration Editor** tool is available in the directory **Program Files\ISD\EplanArticleSync\exe** following installation. For further information, please refer to the online help for the HiCAD PDM/EPLAN interface.

Silent Installation

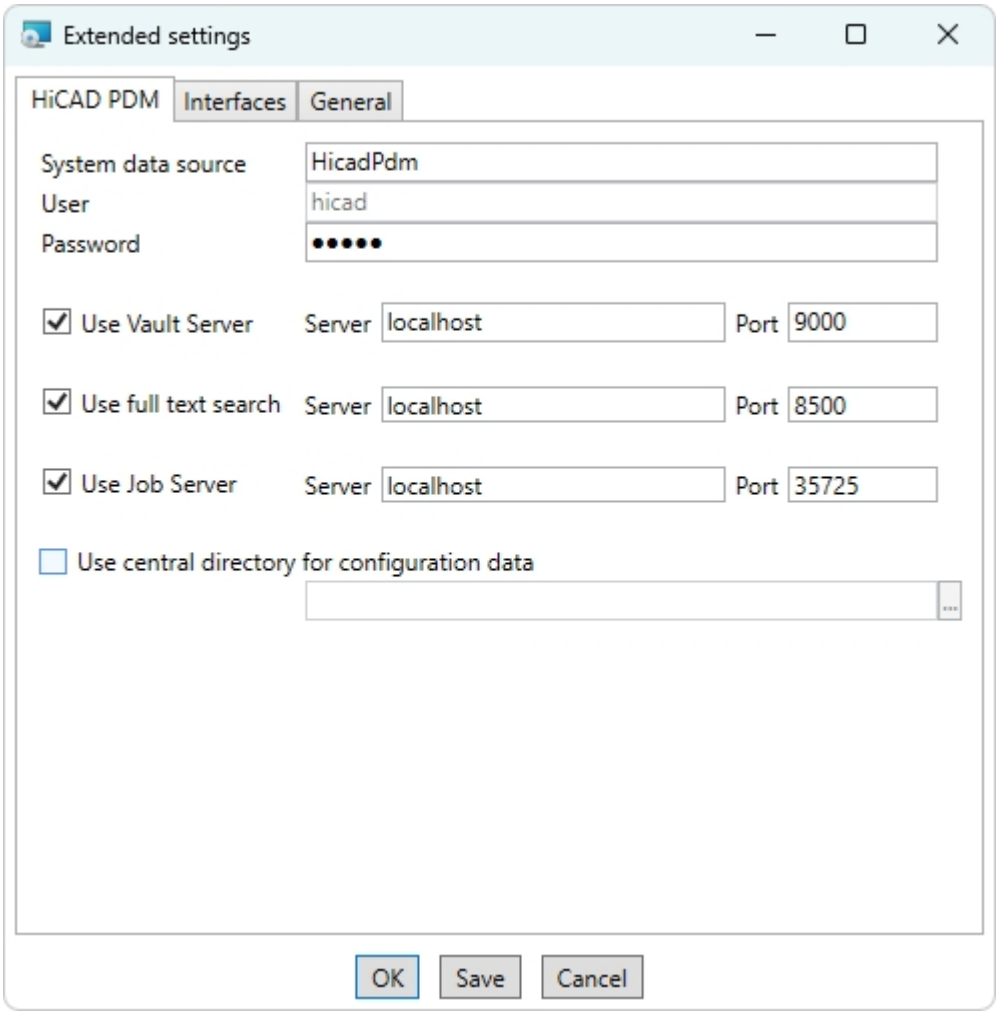
The silent installation can, for example, be configured for HiCAD PDM or the Job Server. The procedure is always the same.

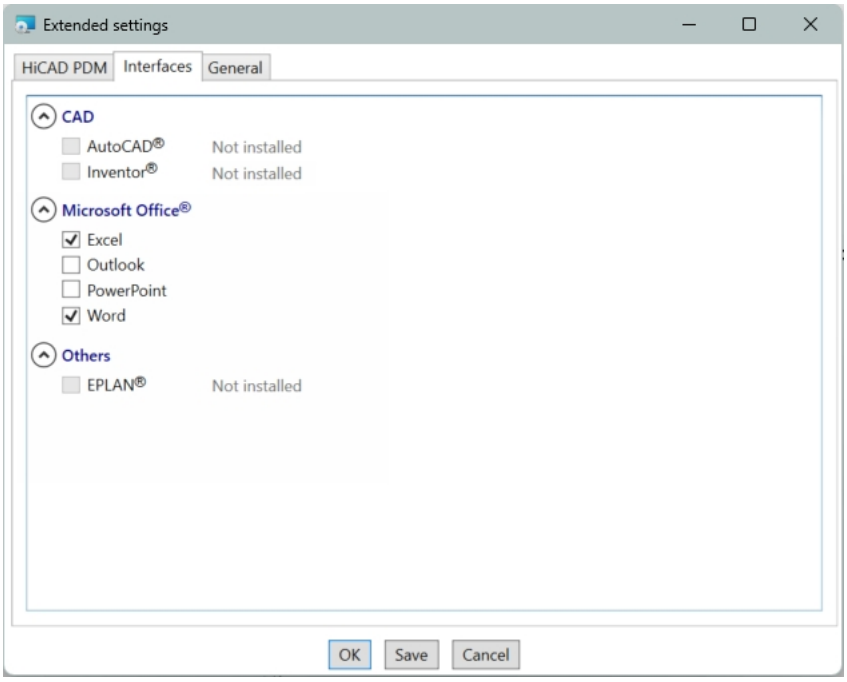
To configure the installation options, start the installation **setup.exe** as usual and make the required settings.

In the last dialogue of the installation, click on **Extended Settings**.



Here you can configure in particular the settings for the in such a way that user interactions will no longer be required.





Clicking **Save** creates a setup.ini file containing the desired settings. This file will be loaded automatically if it is located in the same directory as the Windows Installer package **HiCAD.msi**. Alternatively you can specify a file via the command line:

setup.exe SETTINGS="<Ini-Datei>" /l*v "<Log-Datei>"

or

msiexec /i HiCAD.msi SETTINGS="<Ini-Datei>" /l*v "<Log-Datei>"

In this case the starting will not be “silent”, i.e. the installation dialogues will appear, but with the default values of the .ini file.

The option /l*v "<Log-Datei>" creates a log file of the installation which can be used for the diagnosis of installation problems.

Redistributables

Before distributing the installation you need to install the required redistributables on the target systems in order to circumvent the Microsoft-EULAs.

Examples:

vcredist.exe /passive

NDP48-x86-x64-AllOS-ENU.exe /passive

The respective command line options of the individual Redistributable Installer can be called via the command line option **/?**.

If required, the .msu files of the Windows Installer 4.5 can be installed with the Windows Package Manager **pkgmgr.exe** (http://support.microsoft.com/kb/934307/en).

The packages can be installed with /passive /norestart. Otherwise, a reboot would be initiated automatically. If a package requires a reboot, the return value is 3010; otherwise it is 0 or an error code.

Please note:

- When updating from an older version to HiCAD PDM 2027 (32.0.0) or later, please note that existing Setup.ini files must be modified or recreated.
- For HiCAD PDM, you will find the installation packages under \Desktop\application\Desktop.msi (for a HiCAD PDM Desktop standalone installation) or HicadUpdate\application\HicadUpdate.msi (for HiCAD 3D).
- The difference between using the MSI package and setup.exe is that, if a prerequisite (redistributable) is missing, setup.exe displays an interactive message, whilst the MSI package aborts with an error code. The latter may be more suitable for use within a software deployment program.

Starting the installation in the silent mode

The installation can only be set to the silent mode via the command line:

setup.exe SETTINGS="<Ini-Datei>" /passive /l*v "<Log-Datei>"

or

msiexec.exe /i HiCAD.msi /qb!- /SETTINGS="<Ini-Datei>" /l*v "<Log-Datei>"

As neither dialogues nor error messages are displayed, /l*v "<Log-Datei>" creates a log file of the installation which can be used for the diagnosis of installation problems.

Information on further command line options can be obtained via the command line, by means of the command msiexec /? , and via the Internet at

https://learn.microsoft.com/en-en/windows/win32/msi/standard-installer-command-line-options

Starting a hotfix installation in the silent mode

Example: **msiexec.exe /i "\\entw042\Setups\Hotfix_HiC26022x64-3.msi" INSTLOC="C:\HiCAD" /passive**

Example: Batch installation incl. Redistributables and Log

```
@REM UAC auto elevate -->
@net file 1>nul 2>nul && goto :run || powershell -ex unrestricted -Command "Start-Process -Verb RunAs -FilePath '%comspec%' -ArgumentList '/c cd /d %CD% && %~fnx0 %*'"
@goto :eof
:run
@REM UAC auto elevate <--

@setlocal
@setlocal EnableDelayedExpansion

@set SOURCE=d:\Hicad
@set LANGUAGE=en-us

@for /r "%SOURCE%" %%f in (vc*redist*) do @(
echo "%%f" /passive /norestart
"%%f" /passive /norestart
if not "!errorlevel!" == "0" if not "!errorlevel!" == "1638" if not "!errorlevel!" == "3010" echo Visual C++ Runtime Installation Error && goto error
)

"%SOURCE%\DotNetFX48\NDP48-x86-x64-AllOS-ENU.exe" /q /norestart
@if not "%errorlevel%" == "0" if not "%errorlevel%" == "1638" if not "%errorlevel%" == "3010" echo .NET Runtime Installation Error && goto error

"%SOURCE%\VSTOR40\vstor_redist.exe" /passive /norestart
@if not "%errorlevel%" == "0" if not "%errorlevel%" == "1638" if not "%errorlevel%" == "3010" echo VSTOR Runtime Installation Error && goto error
```

```
@setlocal DisableDelayedExpansion

msiexec.exe /qb+! /i "%SOURCE%\%LANGUAGE%\HiCAD.msi" /l*v "HiCADInstall_%COMPUTERNAME%.log" SETTINGS="%setup.ini"

goto :eof

:error
@echo Error %errorlevel%
@net helpmsg %errorlevel%
@pause
```

Important:

The INI file must always be specified in the batch file with the complete path, as no assumptions can be made about the current directory of the Windows installer process.

If the INI is in the same directory as the batch file, this could be done via **SETTINGS="%~dp0setup.ini"**.

Configuration

Company- or user-specific requirements can be conveniently adapted to the configration.

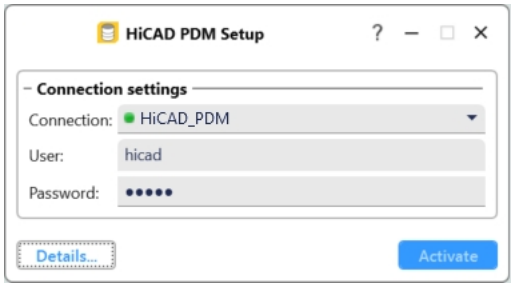
- Database Connection manager PdmSetup)
- Parameter Configuration for HiCAD PDM

Database Connection Manager (PdmSetup)

The **Database Connection Manager (HiCAD PDM Setup)** allows you to enable or change various connection settings for your PDM client, for example, if errors (such as incorrect entries) occur or if changes have been made to the system architecture in the meantime.

This tool is also used to update the database version when necessary, such as after installing updates (see Updating the HiCAD PDM Database).

Run the **PdmSetup.exe** application from the \exe\ directory of your HiCAD installation, or select **Database Connection Manager** from the Windows Start menu (Windows administrator rights are required for this).

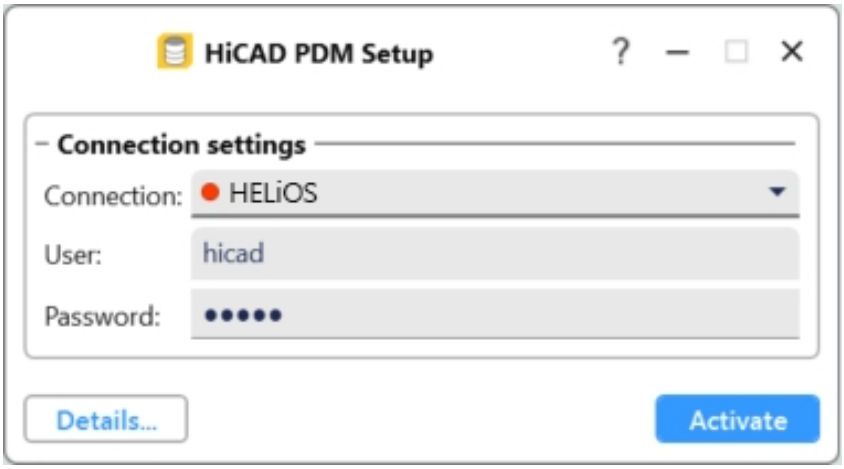


For **Connection**, any ODBC connection that may already be active is displayed (with the name of the associated database in parentheses, unless the names of the ODBC connection and the database are identical).

For **User** and **Password**, you can also show the entered password for verification. The **User** and **Password** entered in the **Database** area of the dialogue window must match what has been configured as SQL Server authentication for your database.

Select the appropriate ODBC data source from the **Connection** drop-down menu. (The drop-down menu only displays ODBC data sources that have been entered in the system.)

A database connection marked in green is the one saved in HiCAD PDM and is therefore the current ODBC connection; an inactive database is displayed in red in the drop-down menu.

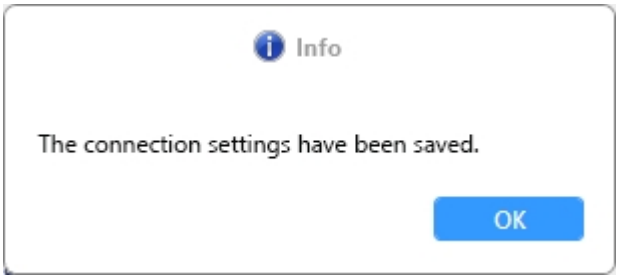


If no connection (or a connection other than the desired one) is active, you must verify that the **User** and **Password** are correct and that the selected **Connection** is the correct one.

Then click the **Activate** button. If the activated database connection is current, this button is grayed out and cannot be clicked.

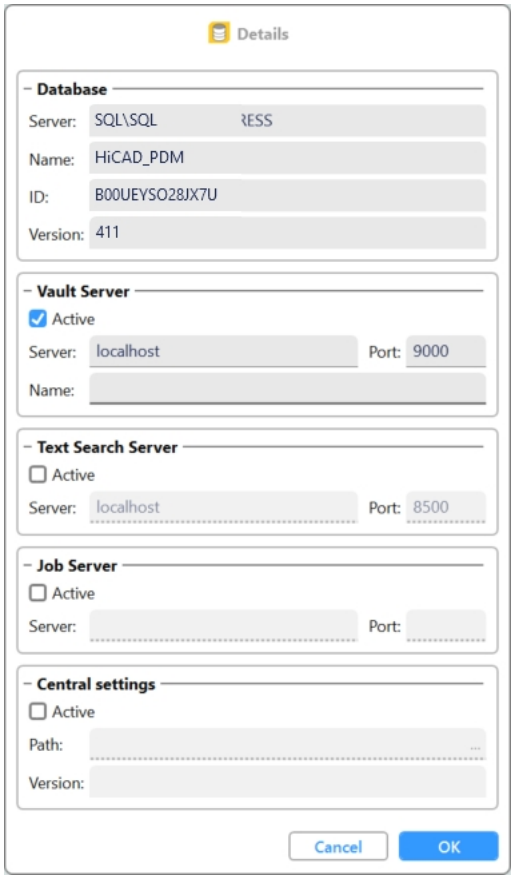
If the **Next** button appears instead of **Activate**, further actions are possible or necessary. For example, updating the database version (see Updating the HiCAD PDM Database)..

If the database connection is established successfully, you will receive a corresponding message.



The tool is structured as a wizard, which means that after clicking **Next**, the necessary update steps are presented to you sequentially in separate windows.

Clicking **Details** takes you to additional menu sections of the window: In addition to the **Database** connection, this includes connection options for the **Vault Server**, **Text Search Server**, **Job Server**, and **Central settings**.



Each of these server components can be enabled or disabled on your client system using the respective Active checkbox and modified as needed:

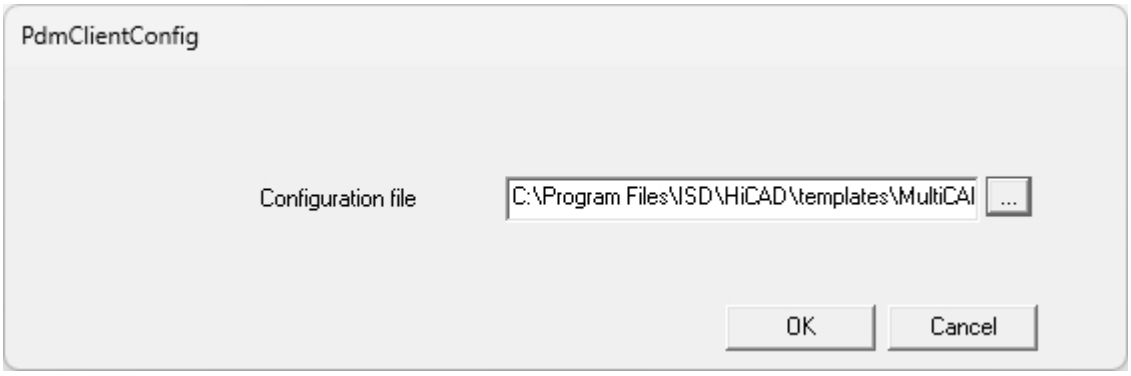
- **Vault-Server**: When activating or modifying this setting, specify the **Server** (name or address path), the **Port**, and the configured, system-internal name of the HiCAD PDM Vault Server.

- **Text Search Server**: When activating or modifying this setting, specify the **Server** (name or address path) and the **Port**.
- **Job Server**: When activating or modifying this setting, specify the **Server** (name or address path) and **Port**.
- **Central settings**: When activating or modifying the central settings directory, specify the **Path** to the directory. The settings **Version** indicates the current and, if applicable, required version of HiCAD PDM.

Parameter Configuration for HiCAD PDM

HiCAD PDM provides appropriately adjusted user interfaces and configurations for various interfaces. During installation of HiCAD PDM the **MultiCAD.csv** file, that sets up the templates required for the operation of the interface, will automatically be run via the **PdmClientConfig.exe** program.

You can also load an own *.csv file subsequently if desired. In the EXE directory of your HiCAD PDM installation, start the **PdmClientConfig.exe** program. Click the ... button to select the path of the CSV file and confirm with **OK**.



Furthermore, HiCAD PDM offers template files for title blocks (AutoCAD drawing frames with database attributes) and HiCAD PDM masks that have been adjusted for Multi-CAD operation:

- In the ...\templates directory of your HiCAD PDM Desktop installation you will find the adjusted HiCAD PDM masks for Multi-CAD operation in the ...\MultiCAD folder. Copy them to the ...\sys directory of your HiCAD PDM installation.
- In the...\templates\AutoCAD\ directory you will find drawing frame templates that you can copy to the corresponding templates directory of your CAD software

Update

- Licensing in Case of Updates
  - Updating the Server License
  - Updating Local Licenses
- Carrying Out the Installation
- Data Compatibility of HiCAD 3D/HiCAD PDM
- Update of HiCAD PDM
  - Backups Before Performing the HiCAD PDM Update-Installation
  - Update Installation of HiCAD PDM
- ISD Update Service
  - Installing the ISD Update Service
  - Using the ISD Update Service
  - ISD Update Service: Settings
- Updating the HiCAD PDM Database
- Manual Registration of Multi-CAD Add-ins

Licensing in Case of Updates

Before updating HiCAD PDM, you must deactivate all licenses (Server Licenses or Local Licenses). The procedures for Server Licenses and Local Licenses are different.

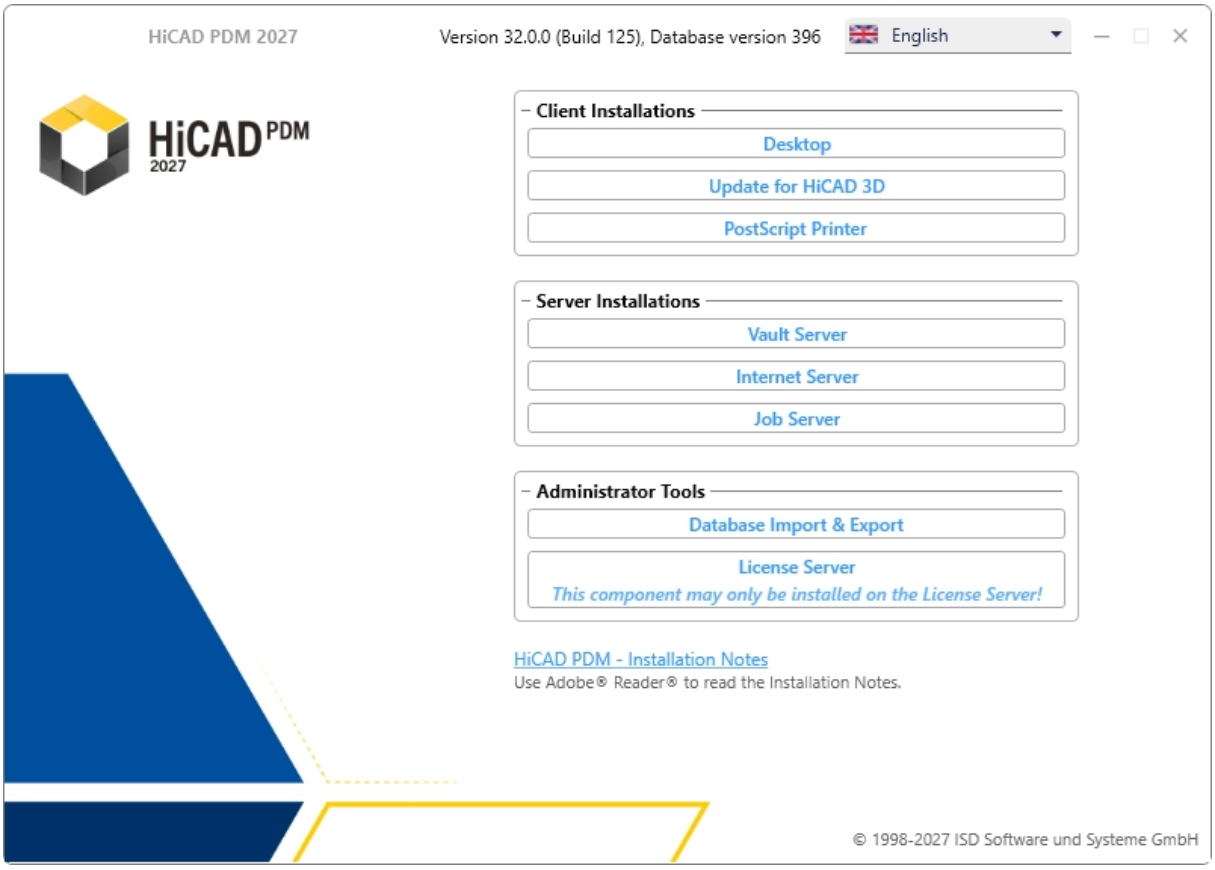
Updating the Server License

For a Server license the License Server software and the License Management tools may require an update. Furthermore, you need to deactivate the licenses for the old Version first, and then activate those for Version 2027.

You can start with the installation of HiCAD PDM before or after activation of the new licenses; a starting of the software is, however, only possible after activation of the new licenses.

The current Version of the License Server, Sentinel RMS License Manager, can be found on the installation medium of HiCAD PDM 2027. If you have an older version, you need to uninstall this version with the help of the Windows Control Panel. First, uninstall the **Sentinel RMS License Manager** there and (if there are any) the AdminToolsServer.

You can then install the new version of the License Server from the installation medium. Start the installation wizard . In the selection mask of the installation wizard, click on the **License Server** button.



Before you can use the new licenses of HiCAD PDM 2027, you need to deactivate the old licenses with the help of the ISD License Manager. This tool is can be found via the in the Windows Start menu under **Program files** > **HiCAD PDM**.

After starting the **ISD License Manager** the **License Activator** tab will be active. Normally, the **EID** (Entitlement ID) field is still filled in and the fields **E-mail** and **Password** are still empty. The activated modules of

the old version are highlighted (blue). Click on the **Deactivate** button to revoke the activation of these modules.

To activate the new licenses you require the **ISD License Manager (Server)**. After installing 2027 this tool is available in the Windows **Start** menu via **Programs > HiCAD Licensing**.

Another prerequisite for the activation of the new licenses is their requesting via the via the Update form and the subsequent provision of the licenses by the ISD.

Start the current **ISD License Manager (Server)**, which you can find in the Windows Start menu via**Programs > HiCAD Licensing** (the ISD License Manager (Server) required for server licenses is installed in the folder C:\Program Files\ISD\AdminToolsServer\exe).

On the **License Activator** tab, enter the **Entitlement ID**, your **E-mail address** and your **Password** and click **Login**. After connecting to the **ISD License Server**, all your purchased licenses will be shown. Use the checkboxes to select the modules that you wish to activate and confirm your selection with a click on the **Activate** button.

After successful activation you can start HiCAD PDM.

Updating Local Licenses

Before installing HiCAD PDM 2027, you need to deactivate the local licenses of the old version on **all** workstations. After installing HiCAD PDM 2027, you need to activate the new licenses.

To deactivate the old licenses you use the **ISD License Manager**, which is located in the Windows start menu at **HiCAD 3D** or in the exe directory of your HiCAD 3D version.

On the **License Activator** tab, click on the **Deactivate** button to revoke the activation of the modules, i.e. to deactivate them. After successful deactivation, a corresponding message will be displayed.

To activate the new licenses you require the most recent **ISD License Manager**. After installing HiCAD PDM 2027 this tool will be available to you in the **Start** menu of Windows under **HiCAD PDM** or in the exe directory of the new HiCAD 3D version.

Another prerequisite for the activation of the new licenses is their requesting via the Update form and the subsequent provision of the licenses by the ISD. After installing HiCAD PDM, start the most recent **ISD License Manager** (Folder [HiCAD 3D/HiCAD PDM installation directory]\exe\ISDLicenseManager).

On the **License Activator** tab, enter the **Entitlement ID**, your **E-mail address** (the address to which the E-mails of the Activation@isdgroup.de were sent) and your **Password** and click **Login**.

After connecting to the **ISD License Manager**, all your purchased licenses will be shown. Use the checkboxes to select the modules that you wish to activate and confirm your selection with a click on the **Activate** button. The selected modules will then be activated on your workstation. You can deactivate them again at any time to enable their use on a different workstation.

After successful activation you can start HiCAD PDM.

Carrying Out the Installation

The installation of HiCAD PDM can be carried out by the Consulting of the ISD. In the context of Update Installation, the last 5 release cycles are supported.

We recommend to note the following instructions:

1. Users with sufficient background knowledge can generally perform the updates themselves.
2. When performing an Update Installation, the "Installation Notes" must be read/considered thoroughly. The responsibility lies with the user. Updates generally fall under the category "Consulting". Therefore, questions about the Update Installation that go beyond purely functional questions about the installation are subject to a charge.
3. When performing an Update Installation, in addition to reading the "Installation Notes", we always recommend carrying out a test update as part of a test installation first and, only if this is successful, carrying out the update in the live system. Customer-specific adjustments to the HiCAD PDM installation may have to be updated/adjusted as part of the test installation.

Since the effort of an update increases with the number of skipped versions, we generally recommend an installation by the ISD. This also saves the user from having to familiarize themself with the Update Installation topics and ensures that nothing will be forgotten.

Update of HiCAD PDM

The ISD recommends performing an Update Installation when switching from an old version to HiCAD PDM 2027 or for the installing of Service Packs and Patches. Before the update, create a backup of the HiCAD PDM Database.

HELiOS Workspaces: Conversion of the system directories

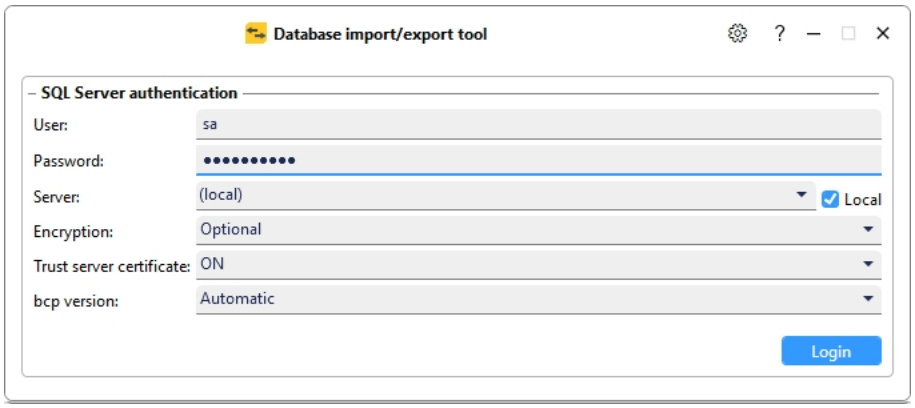
When installing an update from an older version to HELiOS 2025 (from 2027: HiCAD PDM, version 32.0.0) or higher, please note that the directory structure will change (again). As automated migration is not possible, all users must (and, when updating to HiCAD PDM 2027, may need to do so repeatedly) check out all data and clear their workspaces before installing the update to avoid data loss.

In earlier versions, the workspaces were located under %localappdata%. This meant that different workspaces could exist on a single system. To address this, the workspaces were moved to the **%programdata%** directory.

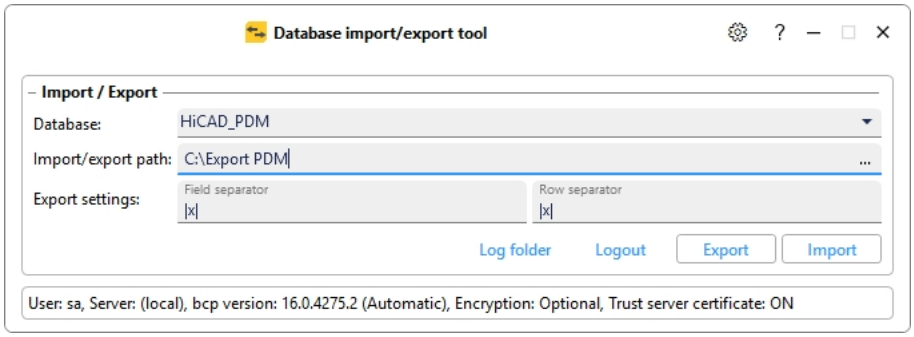
Checked-out files are then located under **%programdata%\Hicad\Pdm\Workspace\(…)***\ (*plus Location ID and User ID). Depending on the version, the workspace databases will be located under **%programdata%\Hicad\Pdm\32.0\General\Locations**.

Backups Before Performing the HiCAD PDM Update Installation

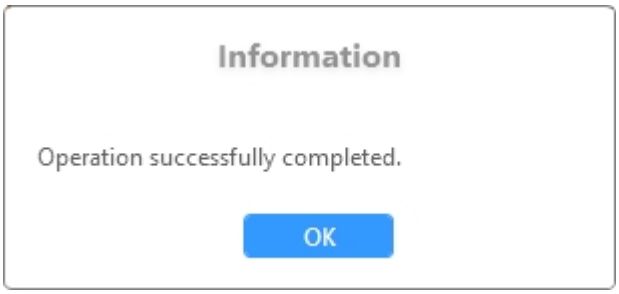
Before starting the Update Installation of HiCAD PDM, you should create a backup of the database (see also InstallationGuide Microsoft SQL Server). To do this, start the **HiCAD PDM Database Import & Export** (DbImportExport.exe) tool.



After entering the user data - user **sa**, the password and the SQL Server to be connected to - select **Login**.



Then enter the name of your database and the export path. The export path must not contain any files. Click on the **Export** button.



After exporting successfully, a message is displayed which you confirm with **OK**.

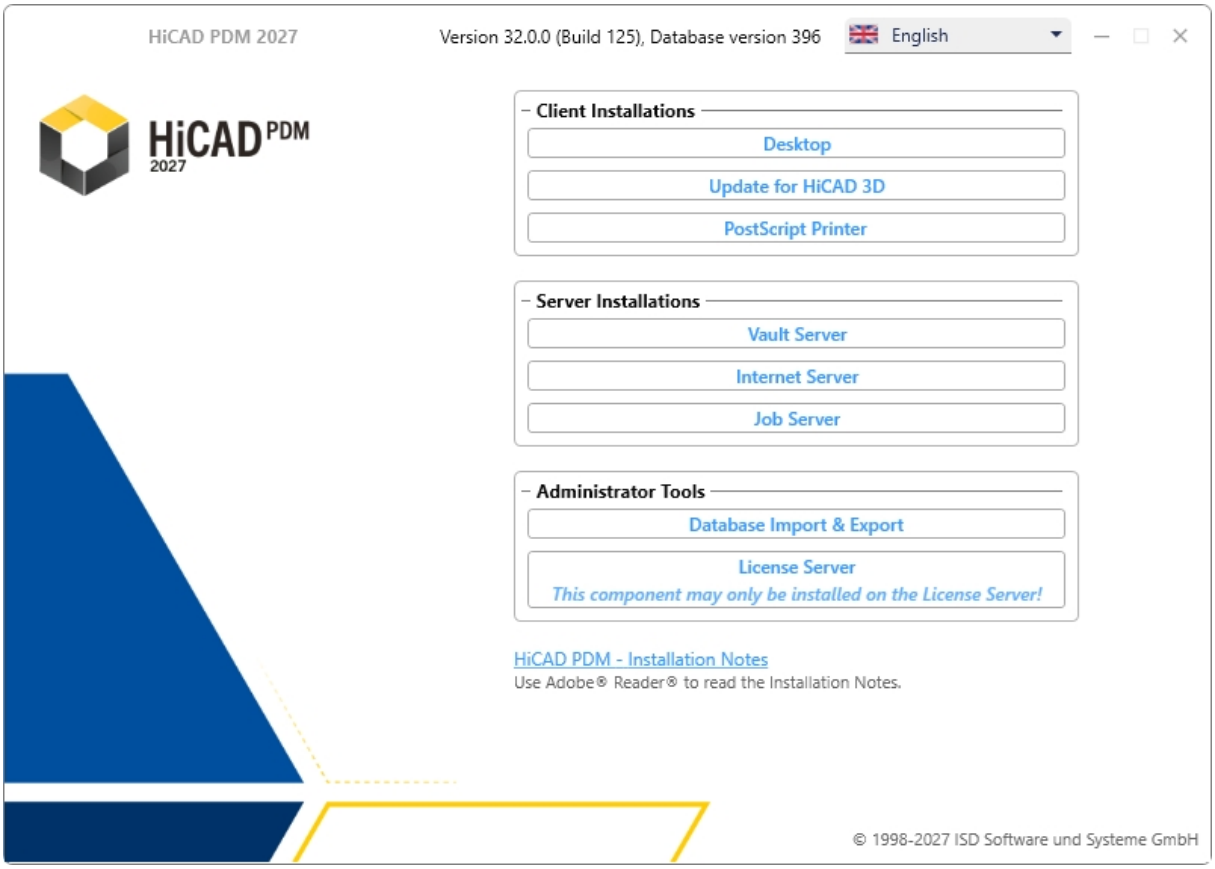
The log file for the operation can be found at %AppData%\Hicad\Pdm\<Major.Minor>\\Logging\DbImportExport\<DB>\DatabaseExport.txt and the configuration file at %AppData%\Hicad\Pdm\<Major.Minor>\DBImportExport\DBImportExportConfig.xml.

Update Installation of HiCAD PDM

You can conveniently download the current HiCAD 3D version in the Download Area. Please note that a HiCAD PDM update usually requires you to also update the database.

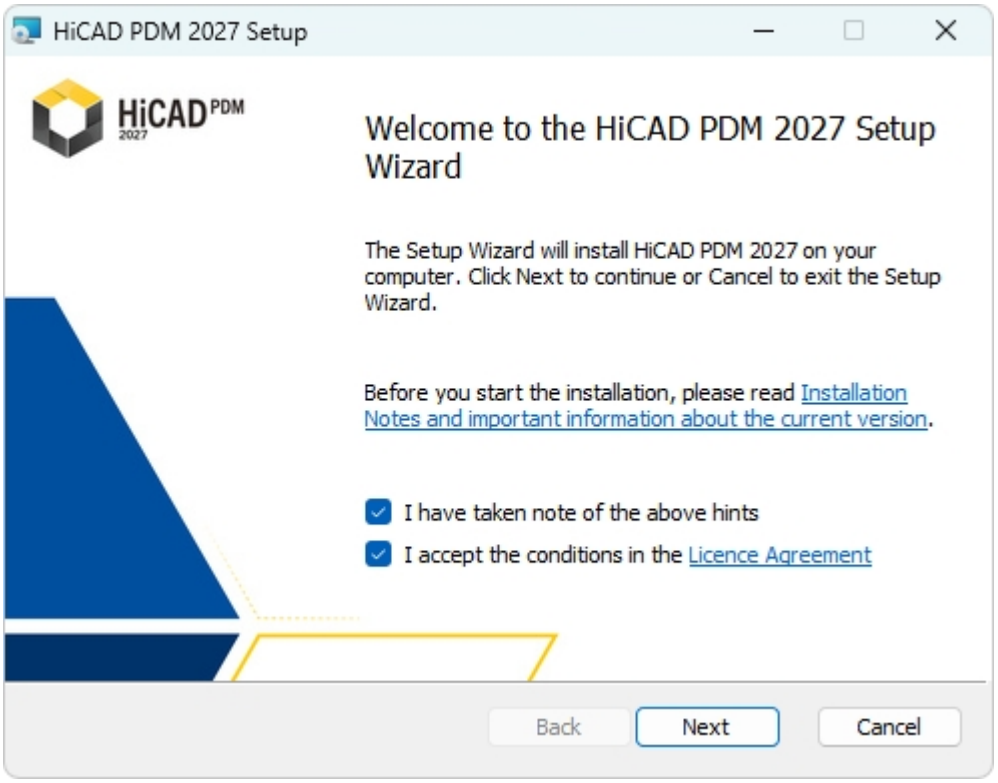
Close all other applications and start the installation wizard. For the installation, it is essential to start the **setup.exe** file from the root directory of the ISO file; this is the only way to ensure that the installation wizard recognises the operating system correctly and installs the appropriate HiCAD PDM version.

Then select the language of the version.



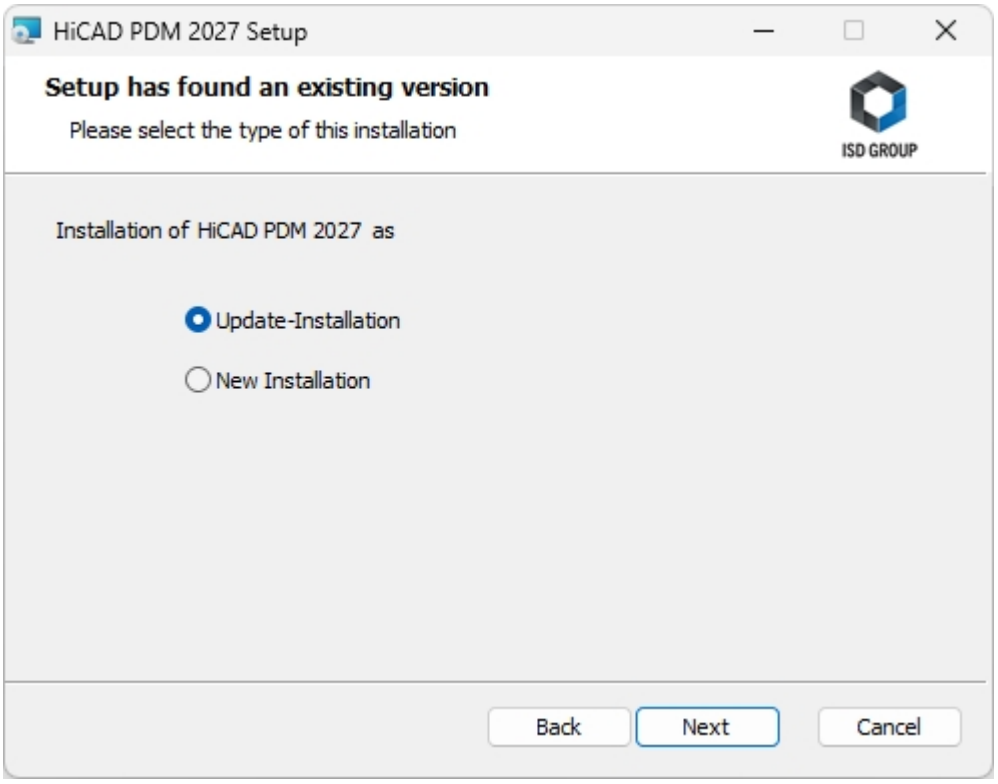
Click on the **HiCAD PDM Desktop** or the **HiCAD PDM Update for XXXX** button (XXXX = year).

Before using HiCAD PDM, Microsoft .NET Framework and the Visual C++ Runtime Libraries must be installed on the computer; if required, these packages will now be installed.

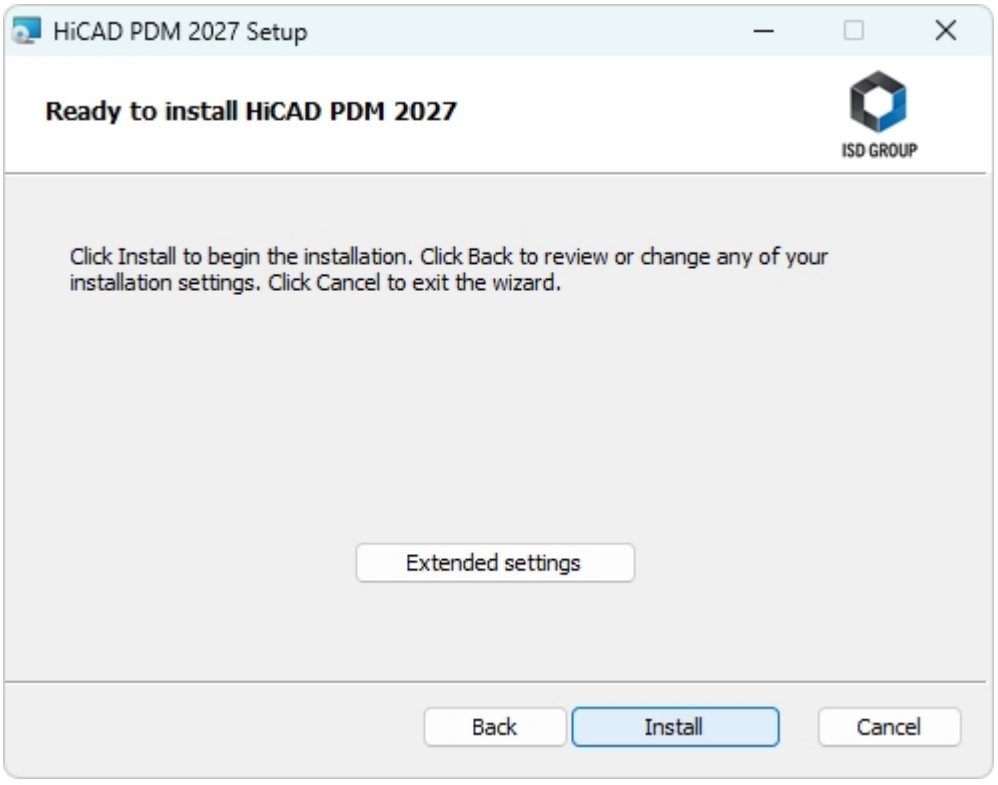


Please read the **Installation Notes** and the Licence Agreement carefully.

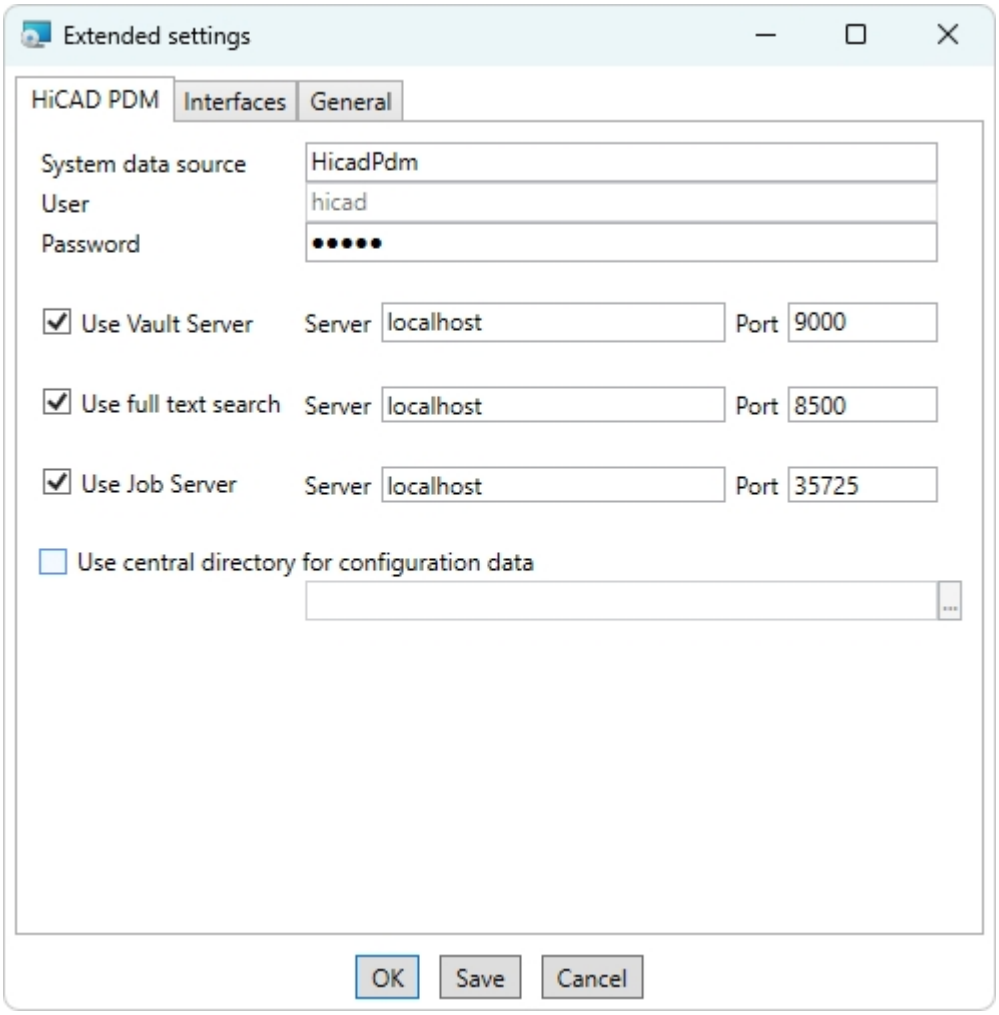
If the installation program finds an already installed HiCAD PDM Version, this will be indicated in a corresponding dialogue window.



Activate the **Update-Installation** option and click **Next**.



You can now start with the installation or modify the **Extended Settings** for HiCAD PDM.

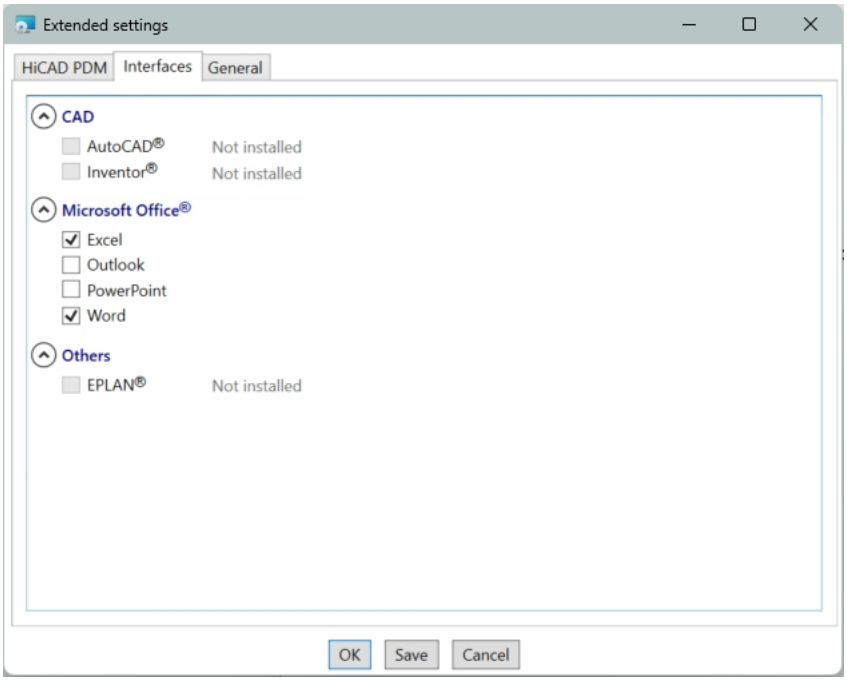


In case of a new installation of HiCAD PDM you can specify an arbitrary name for the system data source. In case of an update, the existing data source will be offered. **User** and **Password** will be identical with the ODBC login.

If you are using a Vault Server, **Use Vault Server** is activated and the **Address** and **Port** are entered. The data of the Job Server is also taken over.

Individual settings in HiCAD PDM can be distributed to other users or workstations. To do this, create a ZIP file in the HiCAD PDM client via  **> HiCAD PDM Options >** Manage... **> Export settings** to create a ZIP file. To load the settings on another workstation, select **HiCAD PDM Options > Manage... > Import settings**. You can then select the ZIP file and confirm with **Open**.

If you want to make the settings available to multiple workstations, activate the **Use central directory for configuration data** option during installation and then select a directory after clicking on the  icon. Via **HiCAD PDM Options > Manage... > Save settings centrally**, you can save the current settings of your HiCAD PDM Desktop to the specified central directory and thus make them available to other workstations.



The availability of interfaces with HiCAD PDM depends on the programs that are installed on your computer. You can only interface 64-Bit versions to HiCAD PDM 64-Bit versions. Multiple selection of HiCAD PDM Interfaces is also possible. The HiCAD PDM functions are integrated into the programs that are linked to HiCAD PDM.

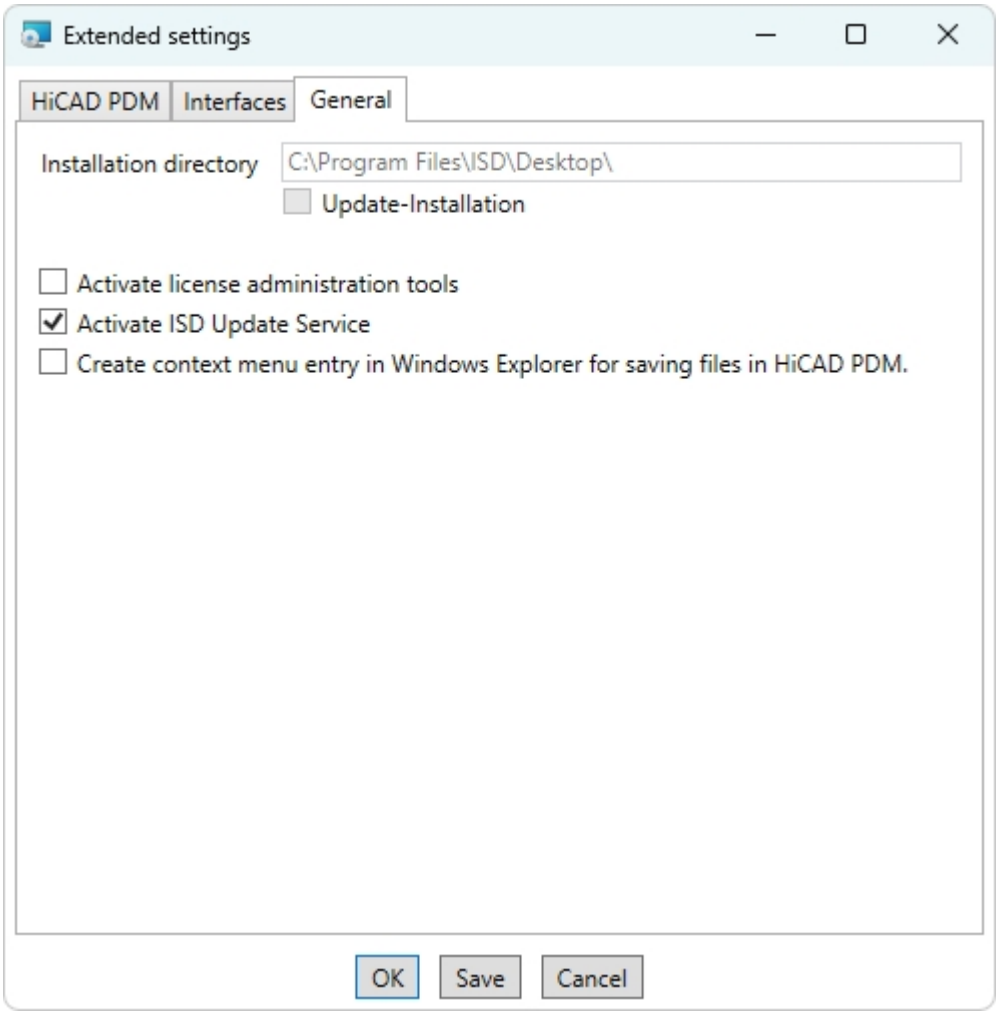
Please refer to the Compatibility Matrix to find out which interfaces to external software are supported by HiCAD PDM.

You can also add interfaces later via the Windows Control Panel. To do this, select **Programs and Features**in the Control Panel, activate **HiCAD PDM** and then right-click to select **Change**. The installation of HiCAD PDM is started and you can select further software on the **HiCAD PDM Interfaces** tab.

Furthermore, the Couplings Manager (PdmCouplings.exe, in the /exe/ directory of the HiCAD PDM installation) is available for establishing interfaces.

Please note:

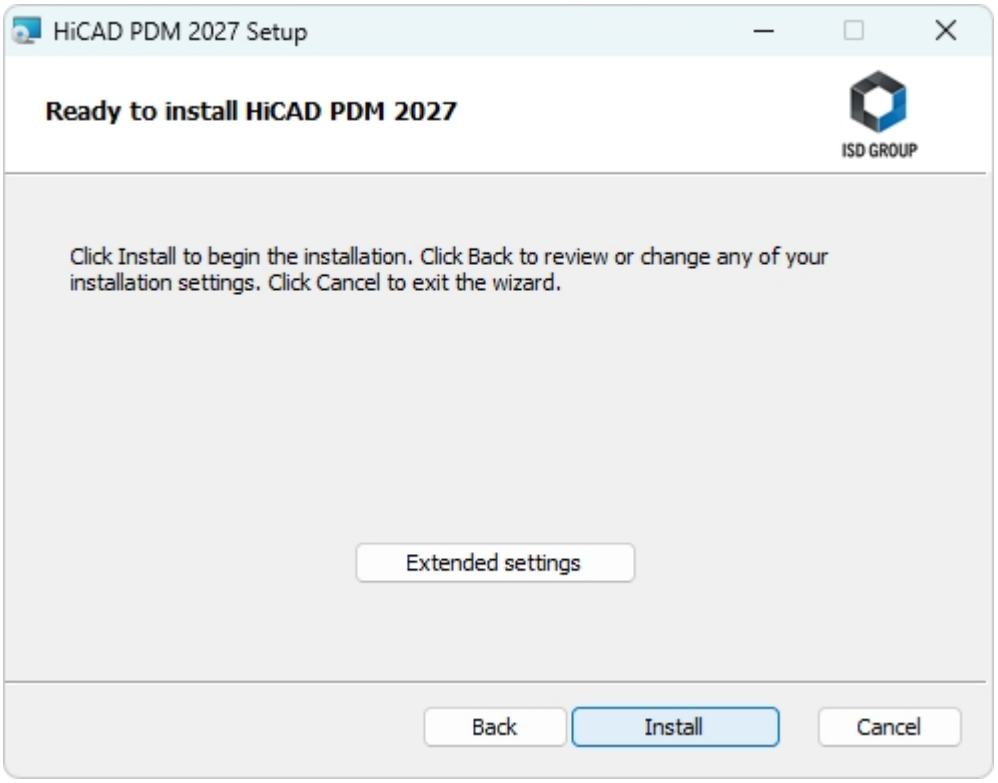
- A prerequisite for establishing interfaces with Multi-CAD software is that the corresponding software is also installed on the corresponding system.
- Establishing an interface between a 32-Bit software and a 64-Bit version of HiCAD PDM is not possible. An
- For EPLAN you also require the EPLAN Article Synchronisation Service running separately on the system. You will find the corresponding button in the HiCAD PDM installation mask. For the configuration of the HiCAD PDM-EPLAN interface please contact the ISD Consulting team.
- If you have installed AutoCAD and AutoCAD Mechanical, both will be considered for the interface.



If you checkmark the **Activate ISD Update Service** option, a Hotfix will be searched on the ISD Web Server when you start HiCAD PDM. You can also activate this option subsequently via the Windows Control Panel: There, select**Programs and Features**, right-click on **HiCAD PDM**and select**Change**.

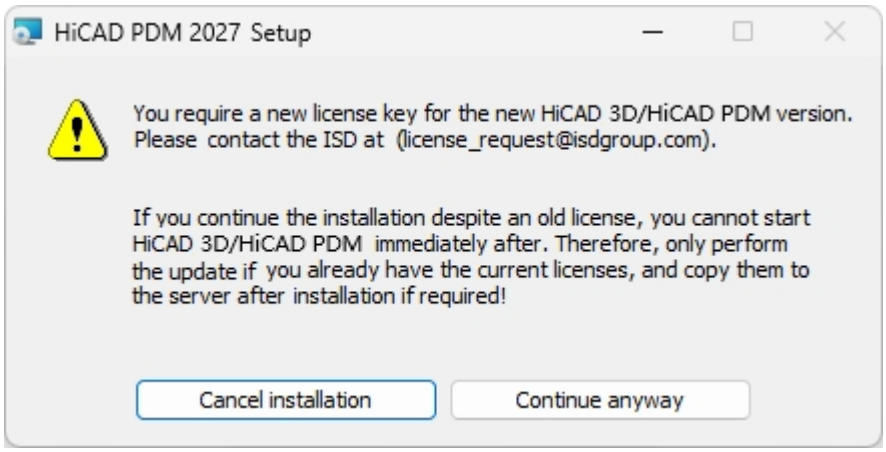
If you want the function **Save to HiCAD PDM** to appear in the context menu of Windows Explorer, activate the checkbox **Create context menu entry in Windows Explorer for saving files in HiCAD PDM**.

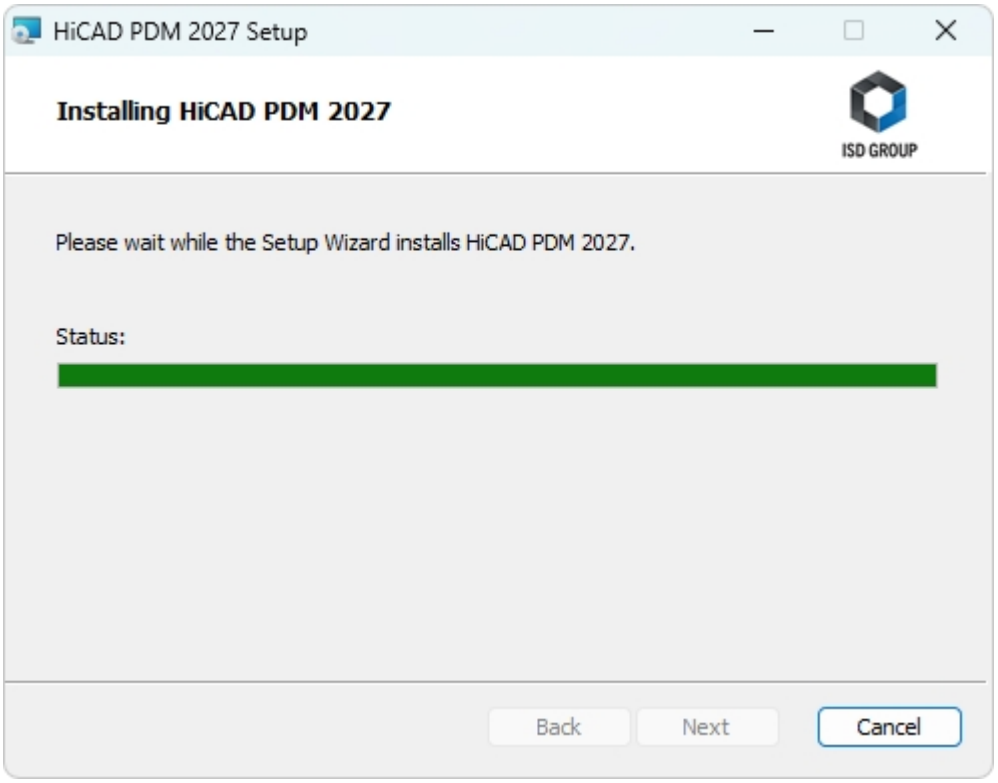
Close the **Extended settings** dialogue with **OK**.

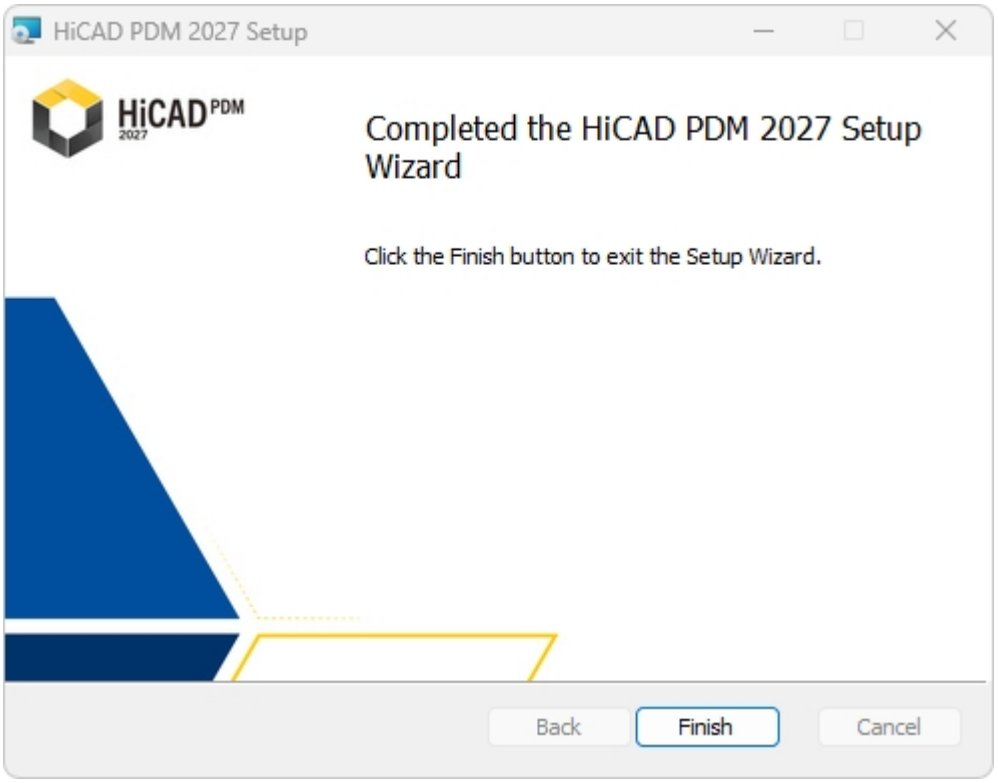


Click **Install**.

You will now be informed that you need a new license key for the new version.







After successful installation, you will find the HiCAD PDM shortcut for starting the program on the Desktop of your computer.

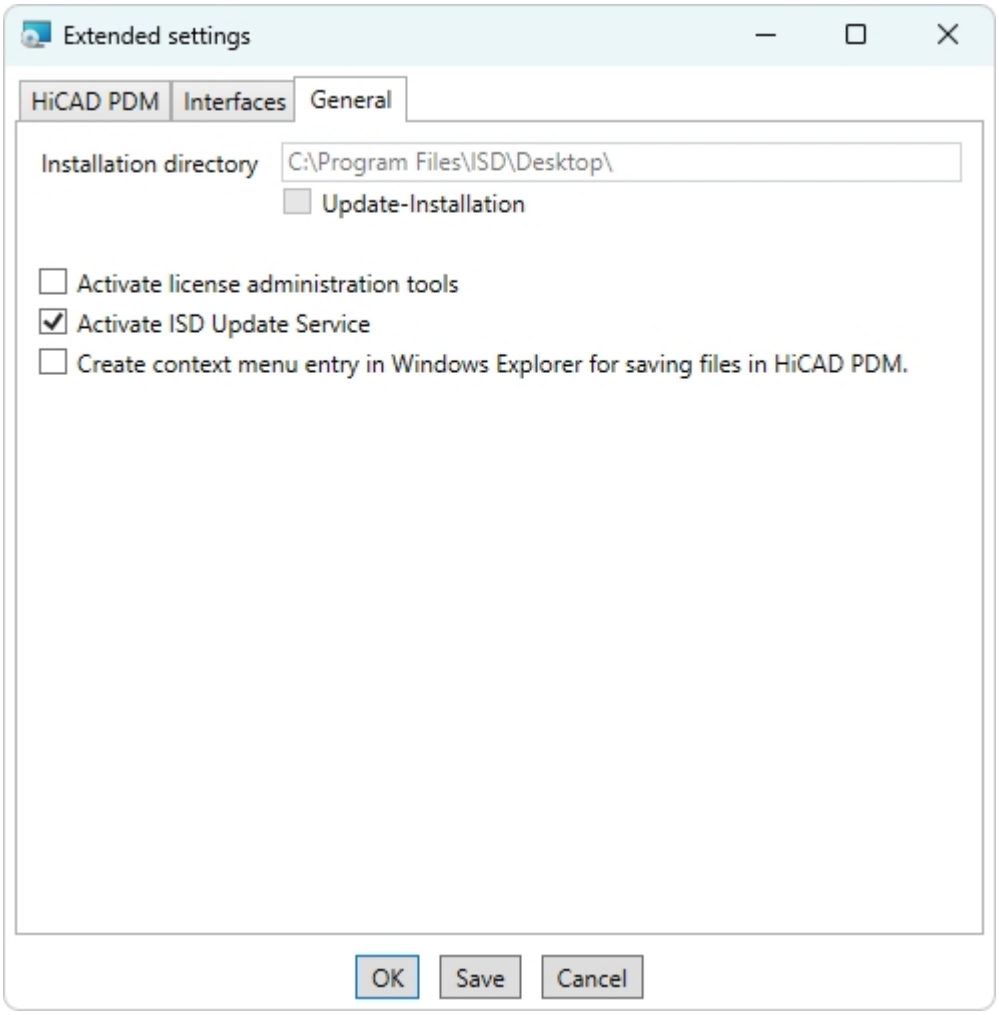
Improvements of the HiCAD PDM functionality require an update of the database. If the database is no longer up-to-date, this will be indicated by a message when HiCAD PDM is started. Use the program PdmSetup.exe to update the database version.

ISD Update Service

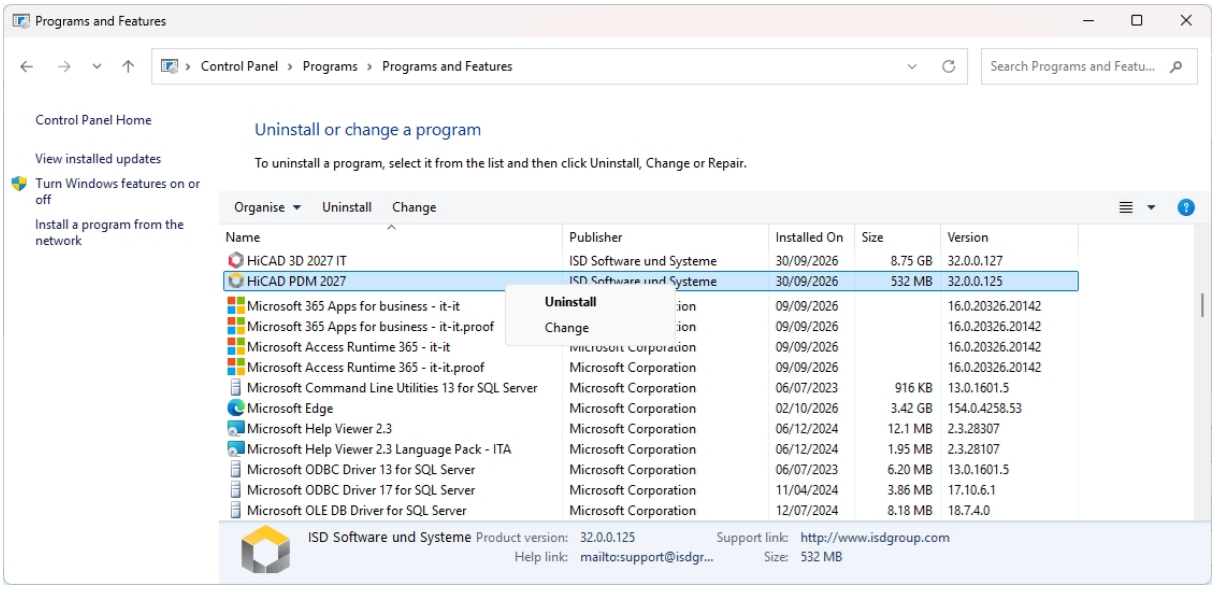
The automatic search for and installation of HiCAD PDM updates (Hotfixes). For this you require the program **ISDUpdateSvc.exe**, that you can either activate during installation of HiCAD 3D or install via the Windows Control Panel afterwards.

Installing the ISD Update Service

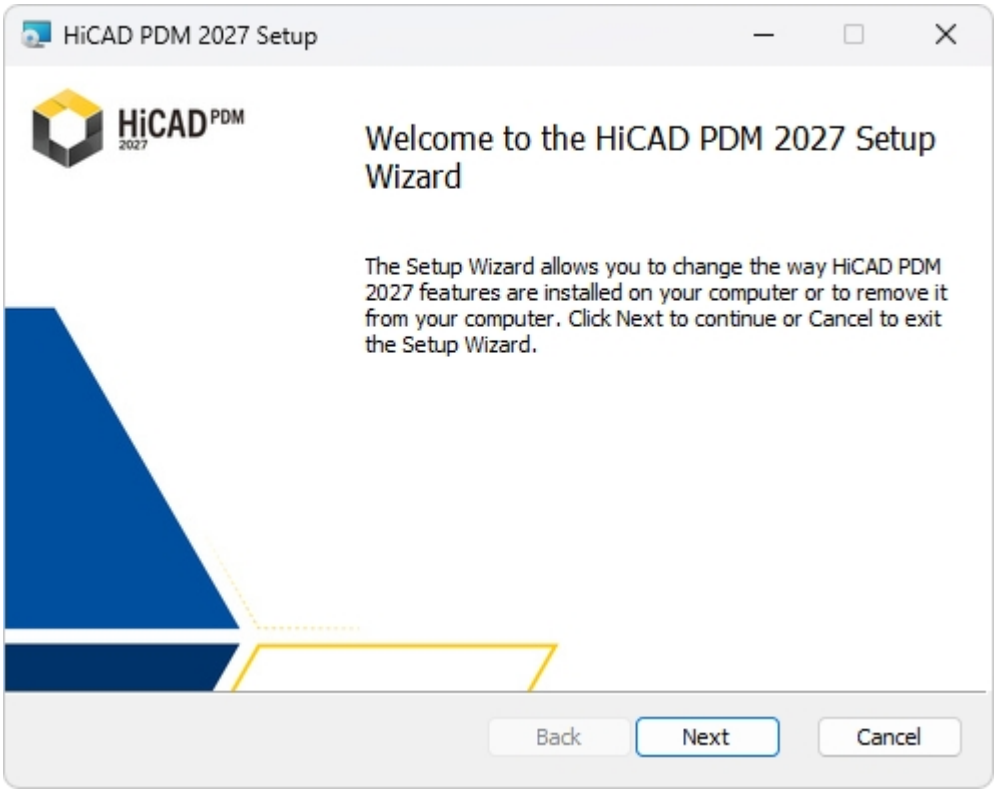
You can activate the automatic search for and installation of HiCAD PDM updates (Hotfixes), either during the installation of HiCAD PDM or, later, via the Windows Control Panel.

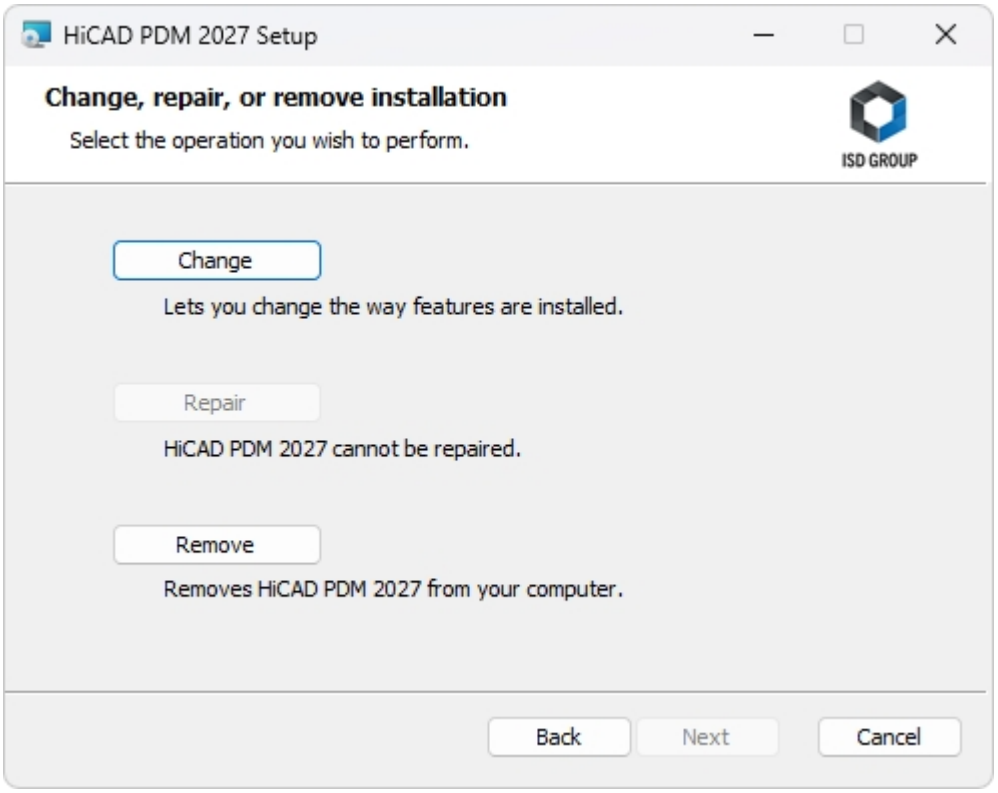


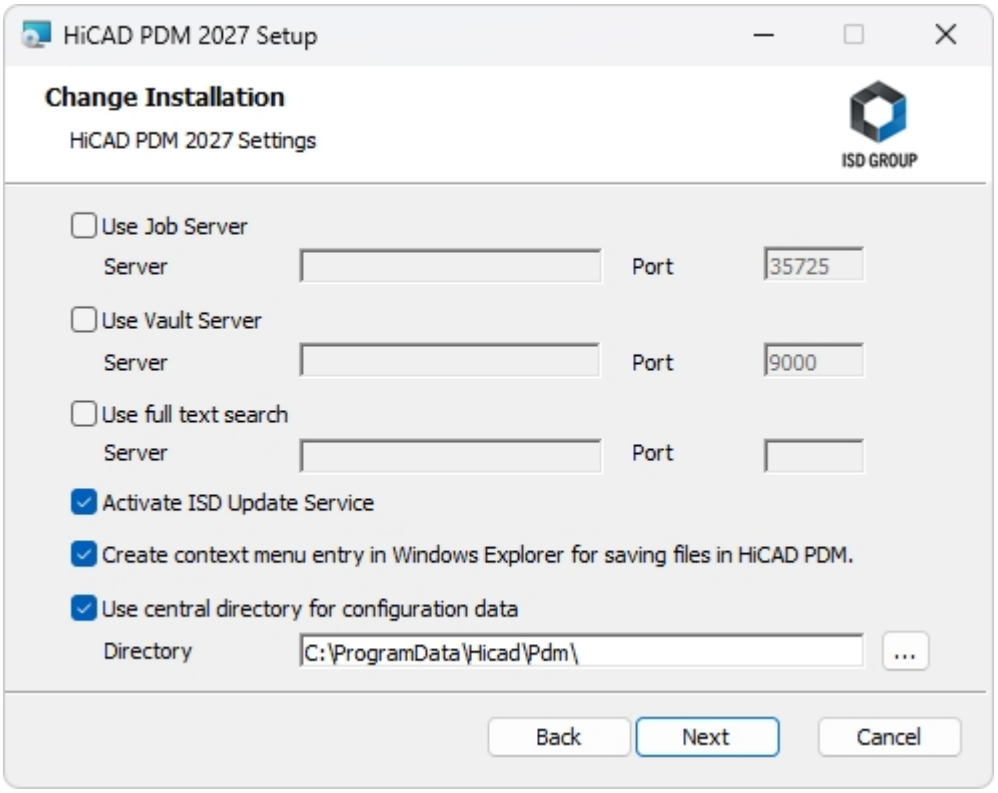
During installation you can go to **Extended settings > General** and activate the **Activate ISD Update Service** option to activate the automatic search for Updates on the ISD Server. You can also activate or deactivate this option afterwards via the Windows Control Panel.



In the Windows Control Panel, choose **Programs and Features**, right-click on **HiCAD PDM** and choose **Change**.







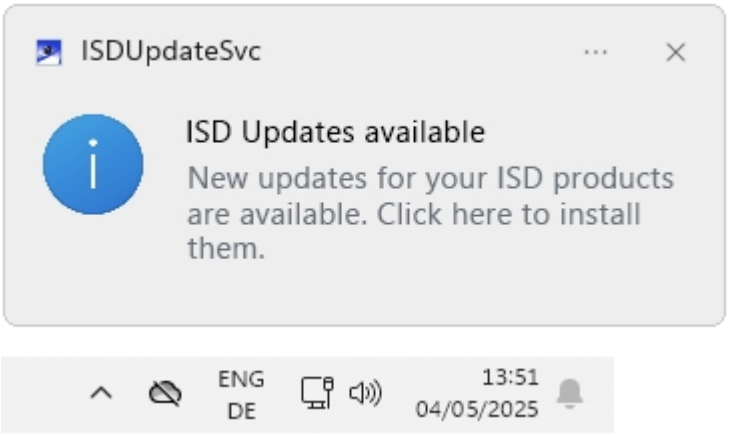
Checkmark the **Activate the ISD Update Service** option and then click **Next**.

After all options have been queried, click **Change**.

After successful installation, the program ISDUpdateSvc.exe will be located by default in directory C:\Program Files\ISD\UpdateService

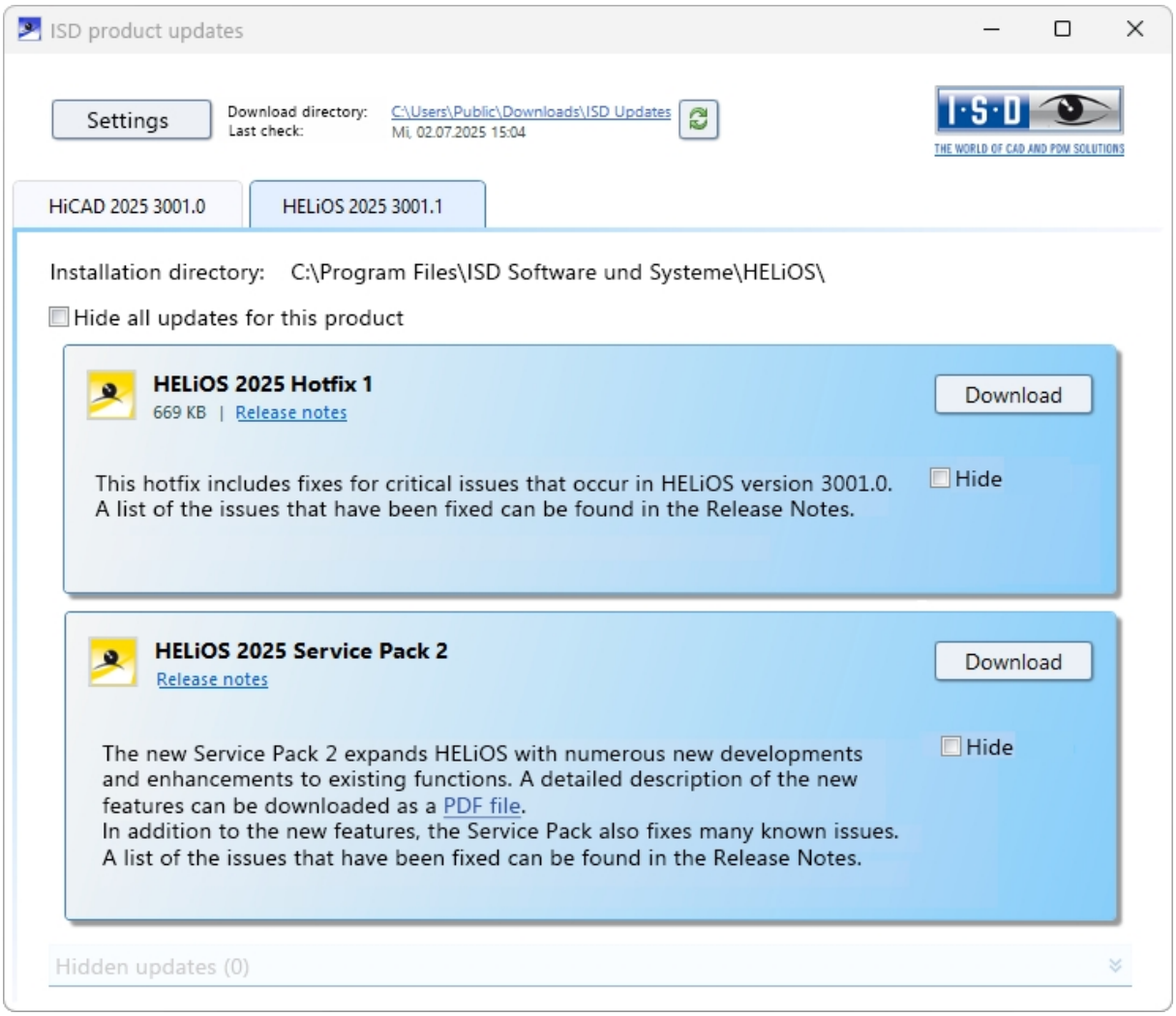
Using the ISD Update Service

If you have installed the ISD Update Service, the following message appears at the bottom right of your screen whenever a Hotfix is available:



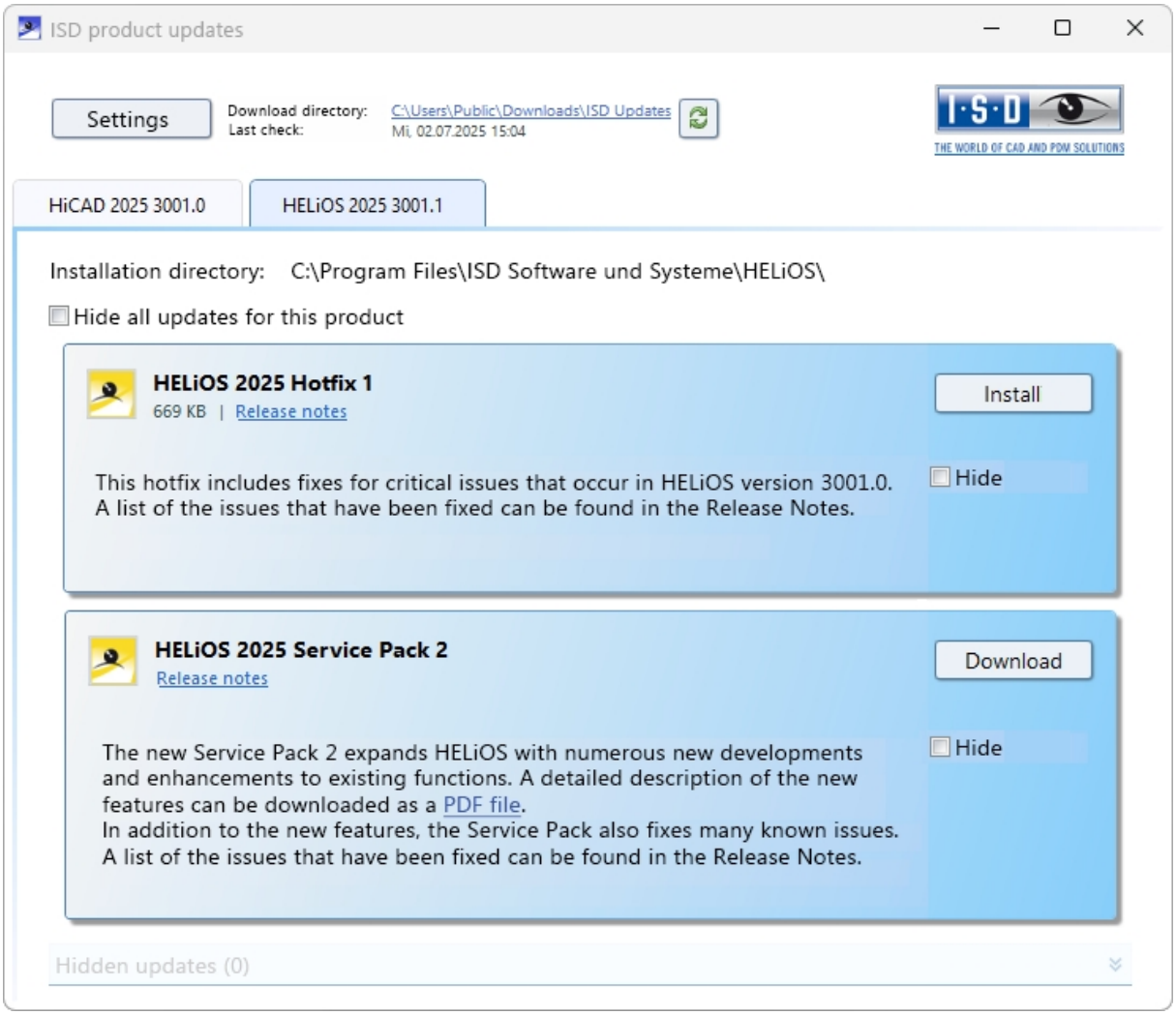
Click on the message or double-click on the tray icon at the bottom right to start the ISDUpdateSvc.exe program. You can also directly double click on the **ISDUpdateSvc.exe** file to start the program.

Please accept the Windows administrator confirmation when ISDUpdateSvc.exe starts.

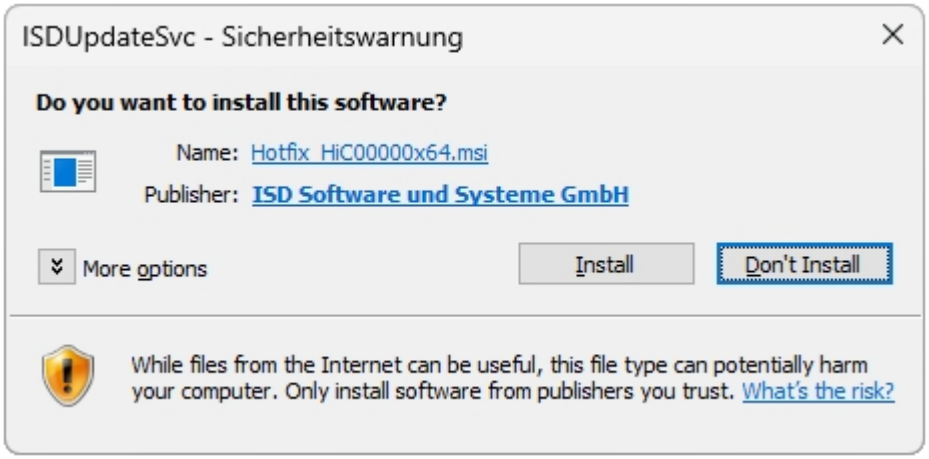


If an update is available, click the **Download** button to download it from the ISD Server to your computer. If an update should not be displayed anymore, activate the **Hide...** checkbox. In addition to the Hotfix, Major Release and Service Pack are also displayed here. However, unlike the Hotfix, you cannot download and install these here.





After downloading of the Hotfix, click **Install**.



Confirm the Windows Security Warning with **Install**.

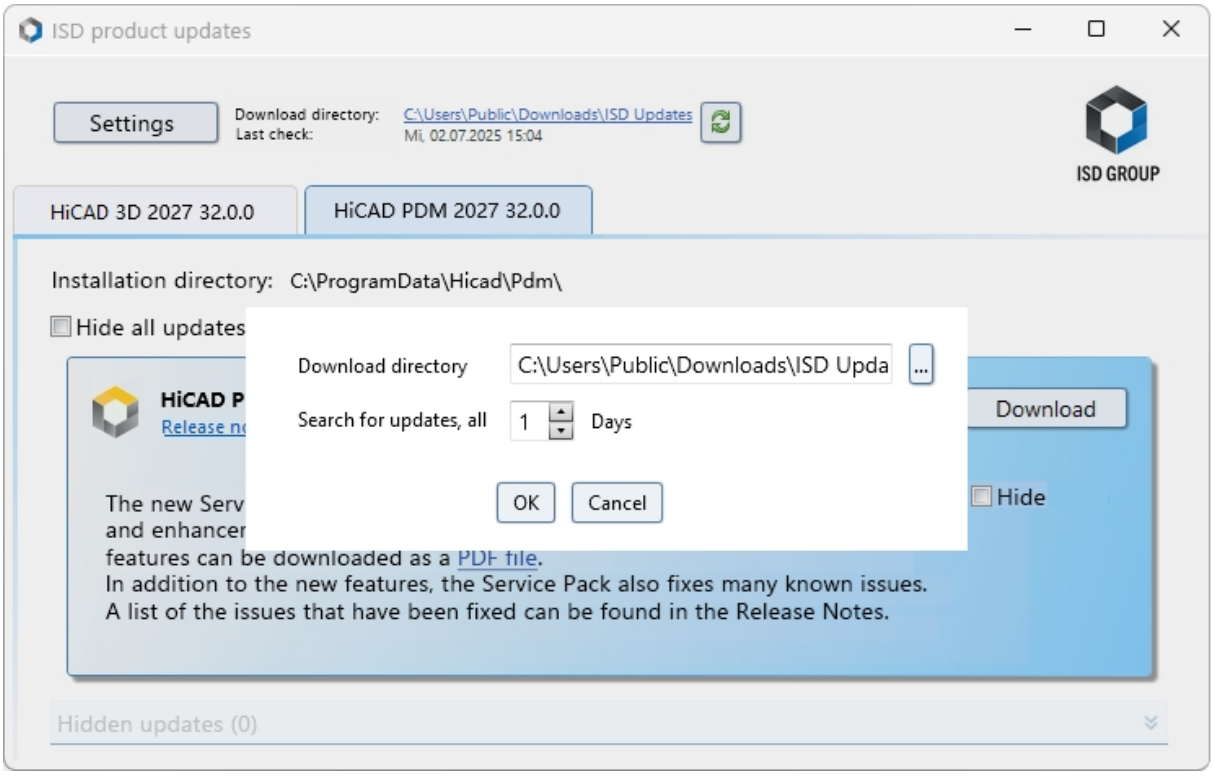
Follow the instructions on the screen to install the update.

The HiCAD PDM Info window indicates the current HiCAD PDM version number (incl. build number) and the numbers of installed hotfixes. To display the Info window, click **Help Topics and Information** on the top of HiCAD PDM Desktop and then select **HiCAD PDM Desktop**.


HELiOS Desktop
HELiOS 2026 Version 31.2.3.489
64Bit Version
© 1998-2026 ISD Software und Systeme GmbH
This program is part of the software family by the ISD Software und Systeme GmbH. All rights reserved.
This is a copyrighted product. Illegal copying or unlawful use is a criminal offence. Violations are subject to criminal prosecution and to claims for damages.
www.isdgroup.com
OK

ISD Update Service: Settings

If you have installed the ISD Update Service, you can, after calling the program (with the icon at the bottom right on the Windows Taskbar, or by double-clicking on the file **ISDUpdateSvc.exe**), configure the search and the installation with the **Settings** button.

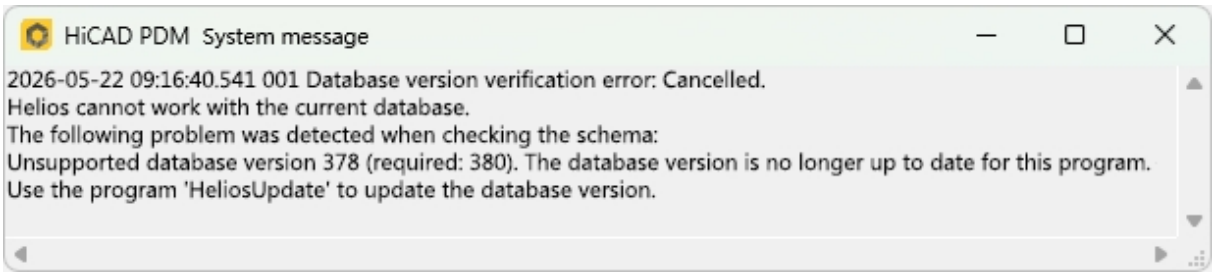


Via the **Settings** button you can specify the download directory for Updates and a time interval for the search for updates.

You can use the icon to start the search for updates manually.

Updating the HiCAD PDM Database

Improvements to HiCAD PDM functionality require a database update. If the database version is no longer up to date after a software update, the following message (version numbers may vary) will appear when HiCAD PDM starts:



The database is updated using the **HiCAD PDM Setup** tool. Launch this tool by double- clicking **PdmSetup.exe** in the \Exe\ directory of your HiCAD installation or by clicking **Database Connection Manager** in the Windows Start menu.

HiCAD PDM Data base schema

As existing datasets with non-compliant conditions may cause conflicts during the central update process of the HiCAD PDM delivery database, you should consider the following:

1. **Create a database backup**: You should make sure that a backup of your HiCAD PDM database has been created before the update. This can be done with the **HiCAD PDM Database Import & Export** tool or via your SQL Server application. Please contact the ISD hotline if you have any questions or need support for your individual system architecture.
2. **The log file of the update**: If any conflicts arise during the update, these are recorded in the log file PdmUpdate.txt (%AppData%\Hicad\Pdm\<Major.Minor>\Logging\PdmUpdate). Please have this file to hand should you need to contact ISD Support to resolve any issues and carry out a successful update in the event that the update does not complete without errors.

Please note:

- You should always back up the database before the update, as the update can generally only be undone by restoring the backup.
- After the update, access is only possible with a compatible HiCAD PDM version. Mixed operation with HiCAD PDM versions that require an older database version is not possible.
- The update must be performed once and then applies to all HiCAD PDM installations.
- Starting with HELiOS 2026 SP 2, the update no longer supports databases older than version 249 (corresponding to the shipping database of HELiOS 2021). For older versions, please contact ISD Consulting.
- Before performing the update, be sure to inform the responsible administrator to ensure a coordinated transition.

- Under certain circumstances, a dialogue window may appear during the update process with the message *The designations of the database attributes must be updated*. In this case, the language-dependent default names for attributes will be updated by the database update. This applies only to default attribute names that have not been changed or created by the user; it affects only attributes that correspond to the default factory settings. In other words, names assigned by the user via the Attribute Editor remain unchanged.

- When updating from a HiCAD PDM version older than HELiOS 2022 Service Pack 2 to a newer version, an expanded set of functions for deriving projects and folders is implemented. Please note that folders created via workflow management action lists, or those containing subfolders created via action lists, cannot be derived. If such folders are found in your database during the database version update, you will receive the following message:

  The functions for deriving project and folder structures have been extended. Currently it is not possible to derive folders which were created via action lists or which contain folders created via action lists with these functions. Since such folders exist in your database, please contact the ISD Consulting department to see to what extent adjustments will be necessary in the future.

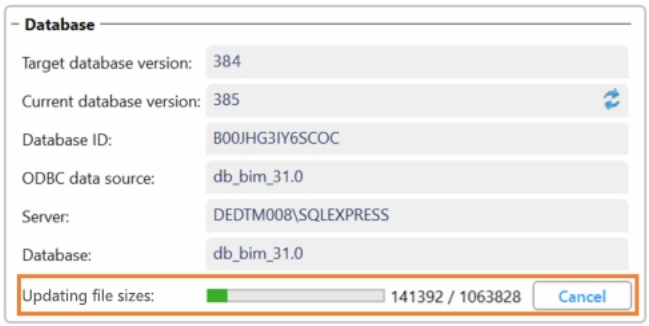
- If you have pipe classes with identical pipe class numbers (RKLname), this will be displayed during a database version update.

  To make a uniqueness check independent of the pipe class number (RKLname), a unique index is assigned to all objects in the database. The reason for this is that HiCAD PDM never takes the path of the objects into account.
  Any conflicts in the database are reported during the database version update, and a database index is created for the pipe classes. You can view this index using the attreditor.exe program and adjust your data or delete the index.

- The system attribute **File size** (HEL_FILE_SIZE), introduced in HELiOS 2026, stores the file size for each document in the PDM database.

  The transfer of file sizes from older datasets to this new attribute is performed automatically as part of a database update using **PdmSetup.exe**. In this case, you will see a progress bar in the database section of the dialogue window during the process: Clicking **Cancel** will interrupt the process of adding the file sizes, which may take some time.

  In this case, you will see a progress bar in the **Database** area of the dialogue window during the process:



  Clicking Cancel may interrupt the process of updating the file sizes, which could take some time. In this case, you will receive a message indicating that you will need to complete the update manually later.

- As part of a database version update from a version older than HiCAD PDM 2027 (major release), all link classes of the “Document-Article” type are converted to the “Article-Document” type.

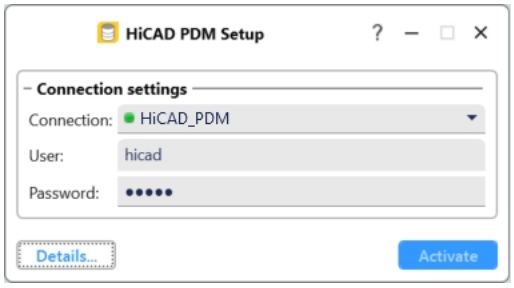
  If such link classes are converted, you will receive the following message:

  The database version update converted link classes of the "Document-Article" type to the "Article-Document" type. This affects the display of the corresponding objects in the Source and Target tabs of the object detail dialogs. Please also check whether any automated processes that rely on the source or target object type need to be adjusted.

- If you are working with a central directory for settings, please note that the behavior varies depending on the version being updated as follows:
  - When updating from a HiCAD PDM version older than 2901.0 (HELiOS 2024 SP1), central settings are not updated.
  - When updating a HELiOS installation to a HiCAD PDM version between 2901.0 and 31.2.0 (HELiOS 2026 SP2), the **PdmSetup.exe** tool migrates the central settings. A directory named **Deprecated-Backup** is created in the central directory for the existing old settings, and they are moved there. The new, updated settings are treated as default settings and are stored in the central directory at **(...)\Pdm\<Version>\Locations\<Location- ID>\Settings** with the name **DefaultPackage**. Plugins (if any) are copied to **(...)\Pdm\<Version>\Locations\<Location-ID>\Plugins**.
  - When updating a current HiCAD PDM database to version 31.2.0, the migrated settings are stored in the central directory in a new subdirectory with the corresponding version name in the path (such as ...\Pdm\32.0\...).

The update can be performed from any HiCAD PDM workstation with a database connection. Windows administrator privileges are required to run the update.

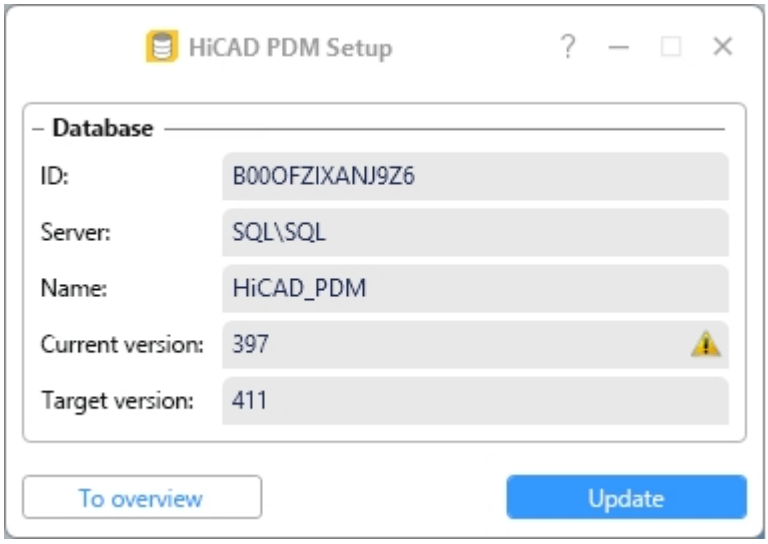
After launching **PdmSetup.exe**, the window shown below appears first:



For **Connection**, the activated **ODBC connection** is displayed (with the name of the corresponding database in parentheses, unless the names of the ODBC connection and the database are identical).

Clicking **Details** takes you to additional menu sections of the window. The tool is structured as a wizard, which means that after clicking **Next**, the necessary update steps are presented to you sequentially in separate windows.

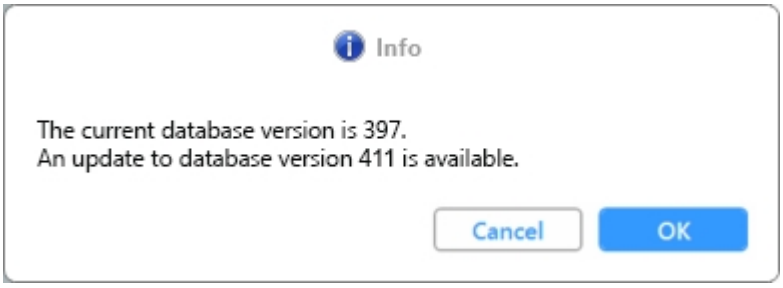
If a database update is required, the following window will appear after clicking **Next**:



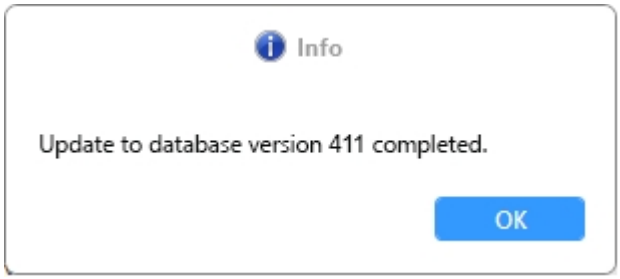
The **Database** area of the window displays information about the database, such as the database ID, server name, and database name (entered as a placeholder in this example), as well as the **Current version** of the database and the **Target version** for the update to be performed.

The exclamation mark icon next to **Current version** indicates that the version is out of date and requires an update.

To proceed, click **Update**. A confirmation prompt will appear, which you must confirm by clicking **OK**.



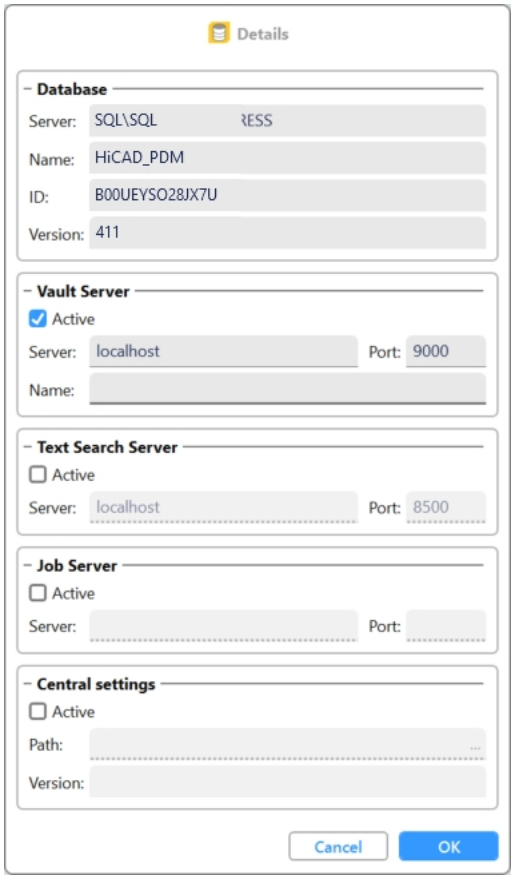
After a successful update, a message like the following will appear:



Close this window by clicking **OK**.

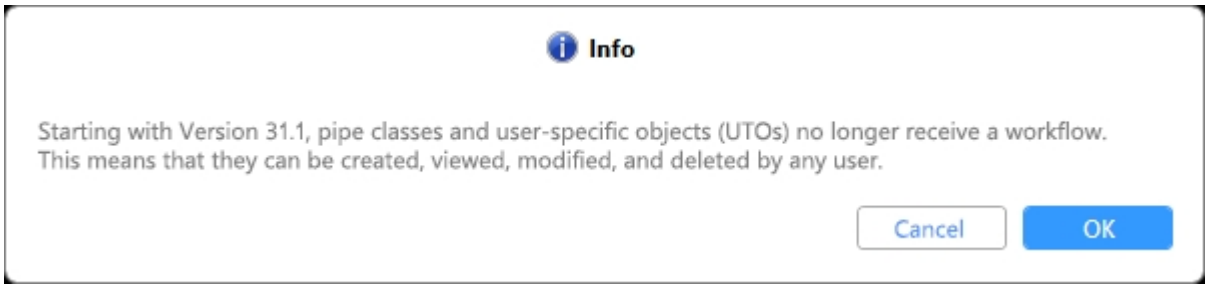
In the window that follows, you can either complete the update process by clicking **Finish** (the window will close) or return to the first connection settings window (see above) by clicking **To overview**.

From there, you can click **Details** to open the full **Details** window, where, if applicable, nothing will be marked as out of date.



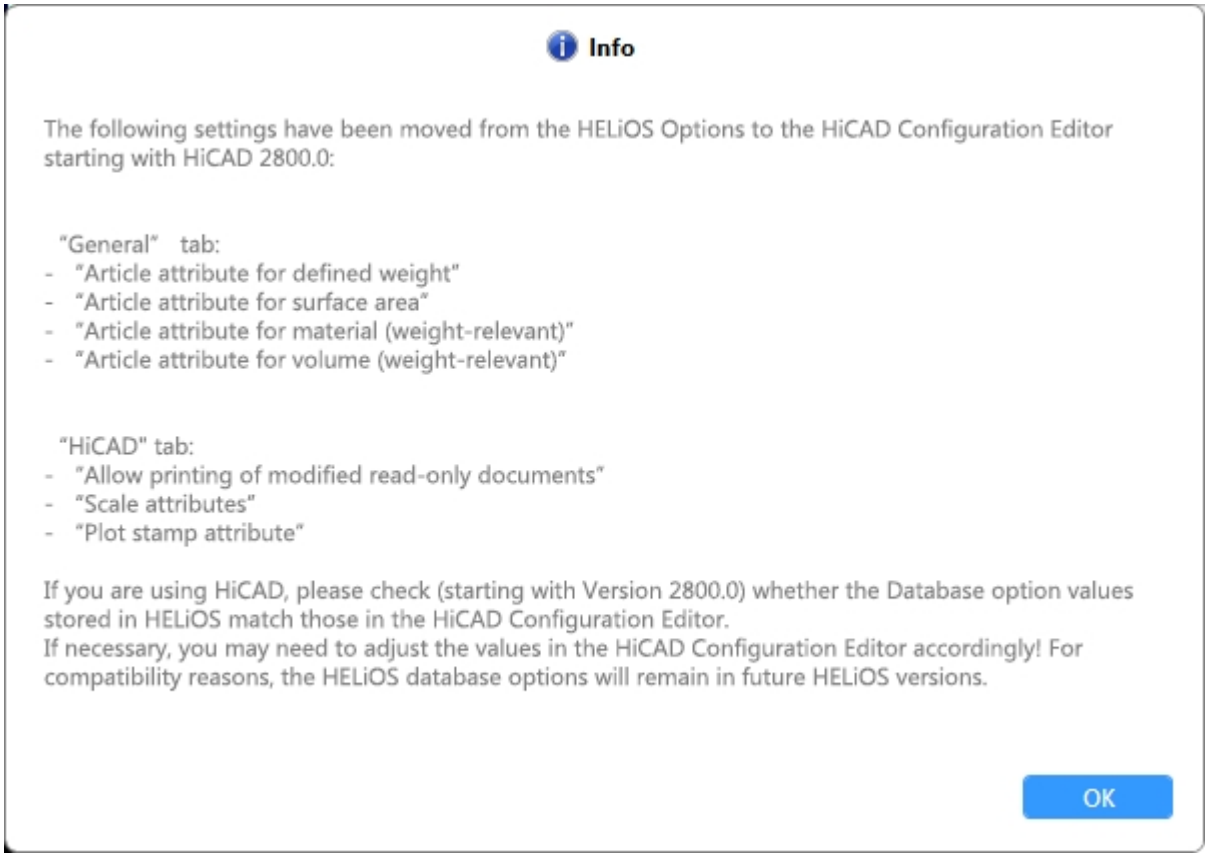
If you are using a central directory for the settings, the **Central settings** area displays the path to the central directory and the HiCAD PDM version of the settings. If no central directory was specified during the HiCAD PDM installation, the fields in this section are empty.

If you are updating from a version prior to HELiOS 2026 SP1, the following message appears.

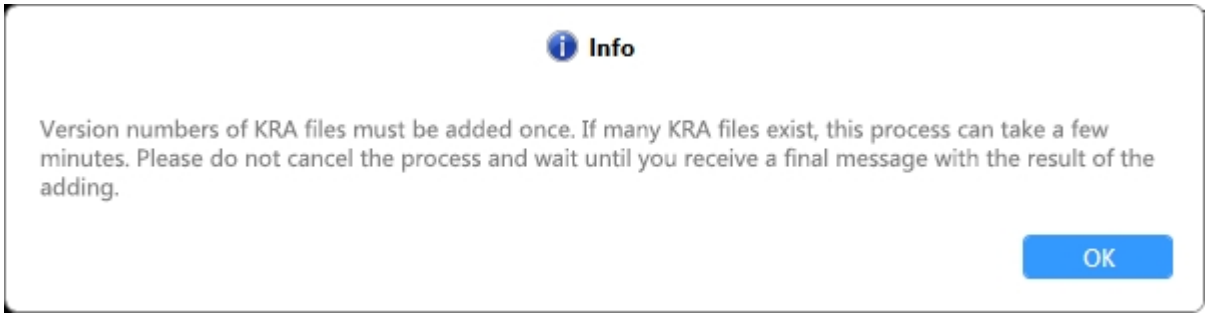


Previously, access rights for pipe classes and user-specific objects were controlled via a workflow running in the background, which was not visible on the objects themselves. If you confirm with **OK**, this workflow will be disabled. Clicking **Cancel** will abort the database update.

The update begins after you confirm the security prompt by clicking **OK**. Depending on the version being updated, the following message appears.

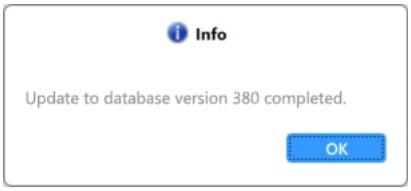


Due to the transition of HiCAD PDM database options to HiCAD 3D Configuration Editor, this important notice appears during the first update to HiCAD 2023 or later. Please read the notice carefully.



Starting with version 2024, the version numbers of 3D parts (KRA files from HiCAD 3D) are stored in HiCAD PDM (prior to 2027 HELiOS). However, for inventory data from customers who do not use the Vault Server, the version numbers are not available in HiCAD PDM. Therefore, the version numbers of the KRA files are now being transferred to HiCAD PDM on a one-time basis. After the transfer, a message may appear indicating the path where you can find the log file with further information.

Then click **OK** to start the update process.



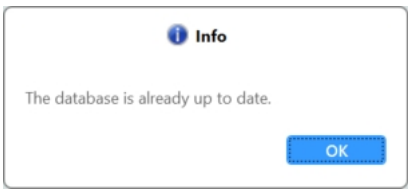
Once the update is complete, you will receive a confirmation message.

If the update process cannot be executed–for example, because the connection to the database fails–you will receive a message indicating the path to the error log file. If the log indicates, for example, that the password

for the ODBC connection is incorrect, you can correct it using the **Database Connection Manager (PdmSetup.exe)**.

If the transfer fails, you must run the tool again from the command line using "**PdmSetup.exe /Check-KraVersion**".

You can perform an additional check by clicking the **Update** button again in the program's main window after confirming this message with **OK**.



After a successful update, the software and database versions must match.

Please note:

When running HiCAD 3D and HiCAD PDM together, it may happen after an update to HiCAD 3D that the error message describing the database version verification indicates a required version number that is lower than the current version–which, according to the message, is not supported.

In this case, please contact our Support team.

Tel: +800 9793166

Fax: +49 2 31 / 97 93 - 101

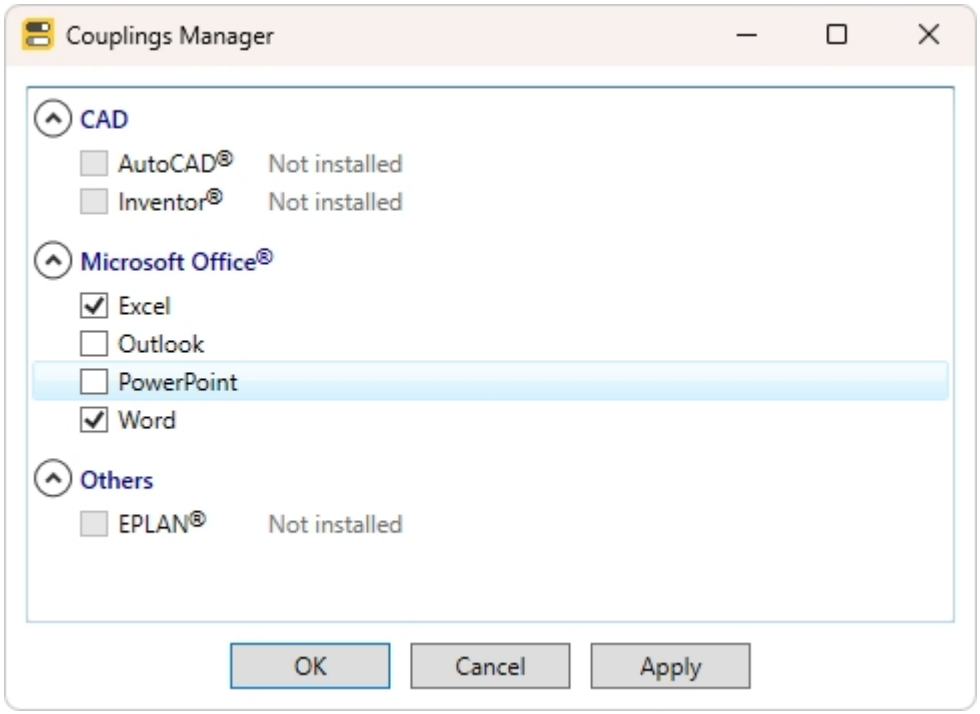
E-Mail: support@isdgroup.com

Manual Registration of Multi-CAD Add-ins

If you use both HiCAD 3D and HiCAD PDM on your system in mixed operation it is not possible (as opposed to the standalone version of the HiCAD PDM Desktop) to establish an interface between HiCAD PDM and further CAD or CAE software via an update or modification installation.

To do so you can use the **Couplings Manager** (PdmCouplings.exe, in the /exe/ directory of the HiCAD 3D installation).

It can be used to activate interfaces with AutoCAD, Inventor or EPLAN.



Activate the checkbox of the required software and confirm with **OK**. The interface will then be activated.

The respective software has to be installed in the system.

Licensing

- General Notes on Licensing
  - ...for Local Licenses
  - ...for Network Licenses
  - ...for Commuter Licenses
- Installing the License Server
- Licensing via Licensing ID (License Activator)
  - AutoRequest Licenses
  - Activate Licenses
  - Deactivate Licenses
  - Trial Licenses
  - Reconstruction of Licenses
  - Notes on the Use of Modbile Computers (Laptops)
- Commuter Licenses
  - Checking Out Commuter Licenses, with Network Connection
  - Checking Out Commuter Licenses, without Network Connection
- License Configuration
- Server Monitor
- Theft of a Workstation

General Notes on Licensing

HiCAD PDM can be activated via 3 types of licenses:

- Standalone Licenses (Local Licenses)
- Network Licenses
- Commuter Licenses

Please note:

- To use, activate, and deactivate network licenses on a virtual machine, you need to follow these steps:
  - A static MAC address is required.
  - A static IP address is recommended or required when using the commuter licenses.
  - Before copying or modifying a virtual machine, deactivate the network licenses because the copy process changes the UUID (Universal Unique IDentifier) of the virtual machine and cannot be deactivated later. This also applies when starting the virtual machine on another host.
  - The use of a cloud server is only possible if changes to the underlying hardware can be excluded by the cloud provider. This also includes that the provider does not move the virtual server to another physical machine.
- If you activated a license while the WLAN card is switched on, this license will only be valid and visible when the WLAN card is switched on.
- In the HiCAD PDM directory DOCU you can find an Online Help for the Licence Manager. You start the Help by calling the LICENSEMANAGER.HTML file in the folder Docu\tools\Licensemanager.
- In the Online Help, on the **PDF Documents on Various Topics** page, you can find the document Checking out Licenses.

General Information on Local (Workstation-specific) Licenses

If you choose local licensing, the activation will be directly locked to the hardware of the workstation on which your HiCAD 3D and HiCAD PDM Desktop program is installed.

The ISD will send you an E-mail containing the Entitlement ID for local licenses (standalone). This ID will be required for the activation and deactivation of the licenses and software modules. Please keep the Entitlement ID! Without this ID you cannot activate or deactivate any licenses! In case of a defect, no reconstruction of licenses will be possible without the Entitlement ID! After installing HiCAD PDM , you activate the licenses by means of the **License Activator** in the **ISD License Manager** (Folder [HiCAD 3D/HiCAD PDM installation directory]\exe\ISDLicenseManager.exe).

General Information on (Server-controlled) Network Licenses

If you choose network (server-controlled) licensing, the license will be directly locked to the hardware of the server that centrally manages the HiCAD PDM licenses. These licenses can be used on any workstation in your network that is connected to this server.

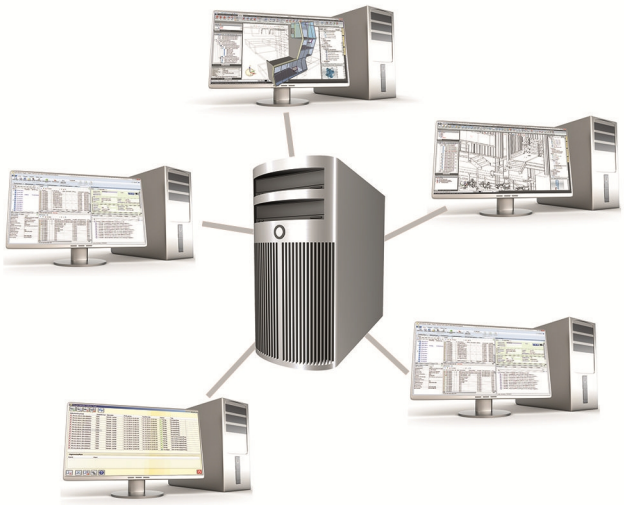
The ISD will send you an E-mail containing the Entitlement ID. If you have several network servers, e.g. at several locations, you will receive one Entitlement ID for each network server. This ID will be required for the activation and deactivation of the licenses and software modules. Please keep the Entitlement ID! Without this ID you cannot activate or deactivate any licenses! In case of a defect, no reconstruction of licenses will be possible without the Entitlement ID! You activate/deactivate the network licenses by means of the **License Activator** in the **ISD License Manager (Server)** (ISDLicenseManagerAdmin.exe).

To be able to use network licenses, a License Server needs to be installed on a computer without HiCAD PDM.

The license server enforces and manages licensing in multi-user environment. It keeps track of all the licenses and handles requests from network users who want to run a HiCAD 3D/HiCAD PDM application, granting authorization to the requesters, or denying requests if all licenses are in use.

The license server must not be installed on the same computer on which an ISD software product (HiCAD PDM) is installed, as both product share system data concerning the licensing information. Formerly, such parallel installations of license servers and ISD products were performed in cases where a customer occasionally wanted to transfer the license to another computer (Remote Commuter License).

Important:
Installations of license servers and ISD products on the same computer are no longer covered by the warranty. The ISD group advises you strongly not to perform such installations.



General Information on Commuter Licenses

Individual licenses can be checked out from the server and locked to a workstation within or outside the network (so-called “commuter licenses”). This enables you to continue working at a different location, without being connected to the license server (unless your HiCAD PDM installation requires a connection to a database server).

To do this, when installing HiCAD PDM Installationon the workstation (client), select the **Activate licence administration tools** option. This will activate the **Server Monitor** (shows who is currently using which licences) and **Commuter Licence** (borrowing a licence, e.g. for a laptop) tabs in the client’s ISD Licence Manager.

You should then define a specific period during which the licence is to be available on the selected workstation. During this period, the licence is reserved on the licence server. Once this period has expired, the

licence becomes available again automatically on the licence server. It is also possible to manually return this licence to the server before the defined period expires, provided the workstation is connected to the server. Licences for a workstation can be checked out for a minimum of one day, with the day being counted from 01:00 on the day following the check-out time.

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If you want to replace/exchange your license server, you need to deactivate all licenses first.

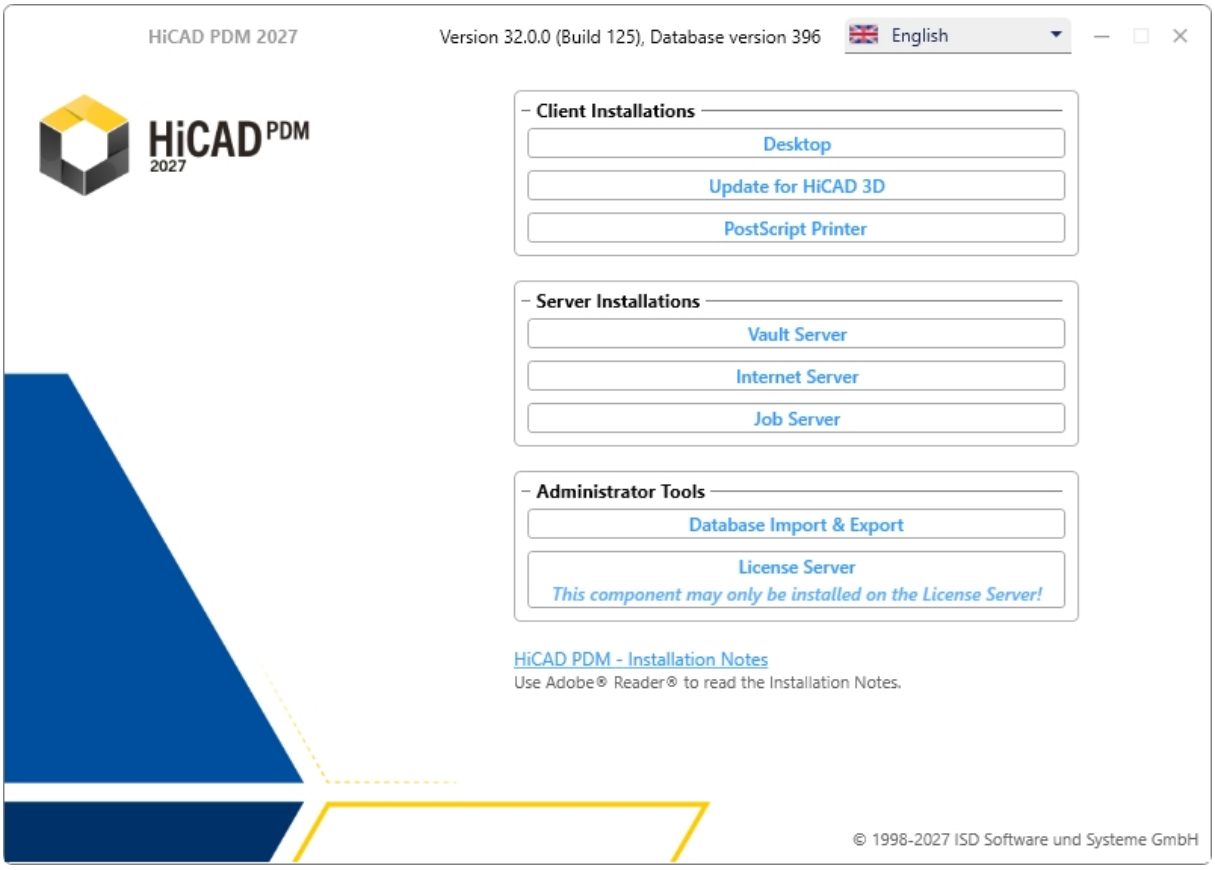
Practical Examples of Network Licensing

- Let us assume that three licenses have been activated on your server. Monday morning (11.00 am) you suddenly need to see a customer for design tasks, and you know that you will still be on-site at the customer's facility on Tuesday. You therefore check out a license for 24 hours on 11.00 am. This means that you can use this license until Tuesday night, 11.59 pm, from your mobile workplace. After expiration of this period, the license is automatically made available again on the server. If you manage to finish your work on Tuesday at midday, you can go back to your office and return the license to the server somewhat earlier.
- Similar situation as the one described above, with the difference that you are not in your office on Monday, 11.00 am. In such cases you can generate a hardware ID, enabling your colleagues in the office to check out a license for you. This license is sent to you by E-mail and can then be activated. In contrast to the previous example, this license is exclusively available to you for a fixed period of time and cannot be returned to the server before expiration of this period.

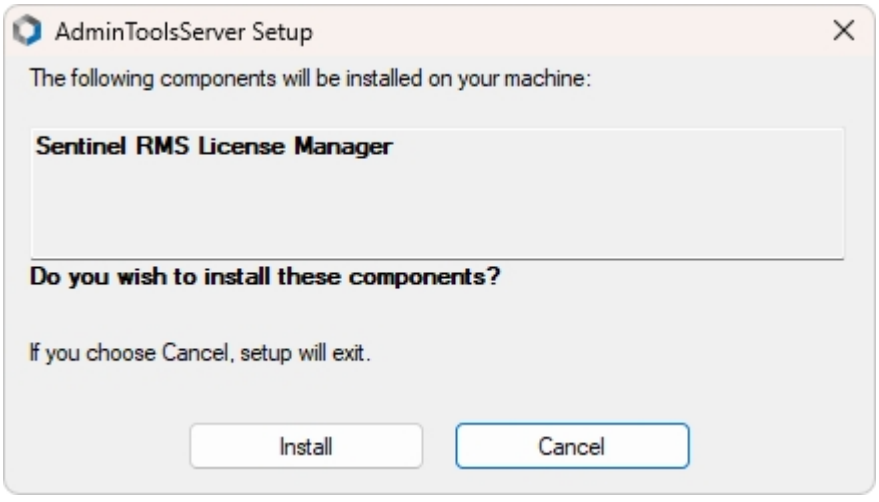
Installing the License Server

If you want tp perform a HiCAD PDM update to Version 2027 and use a license server (i.e. work with network licenses), you require the License Server from the installation medium. If you have an older version, you must first uninstall it. This can be done via the Windows Control Panel. Uninstall the **Sentinel RMS License Manager** and, if present, the **AdminToolsServer**.

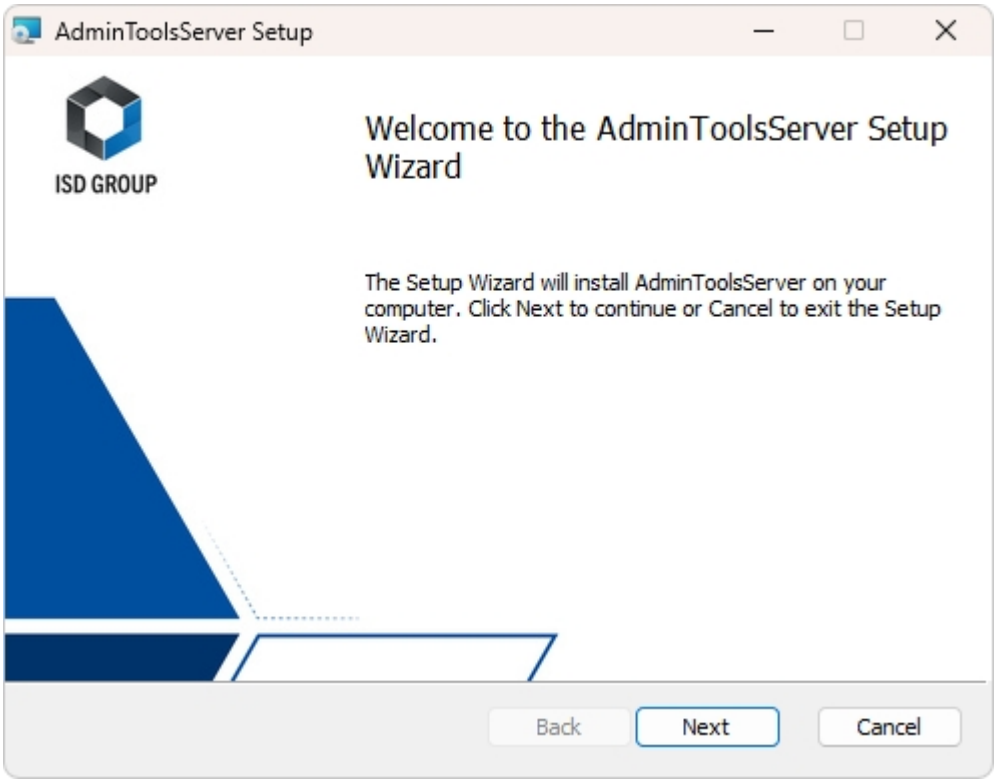
To install the License Server, start Windows. If Windows has already been opened, close all other applications and start the installation wizard.



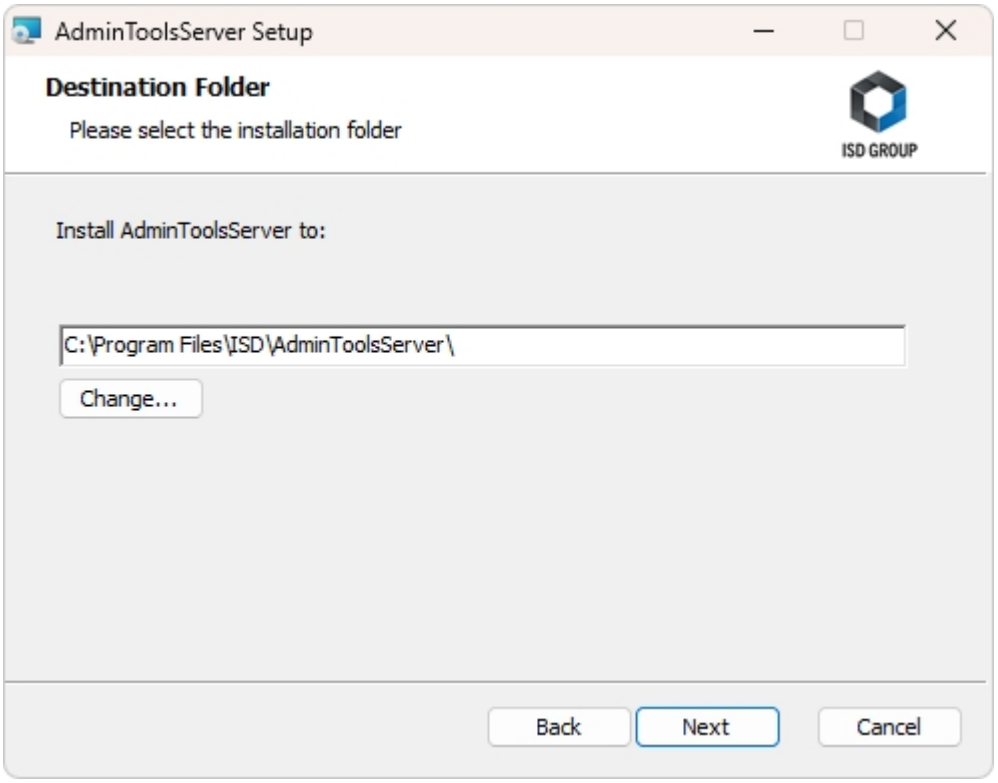
Start the installation of the **License Server**.



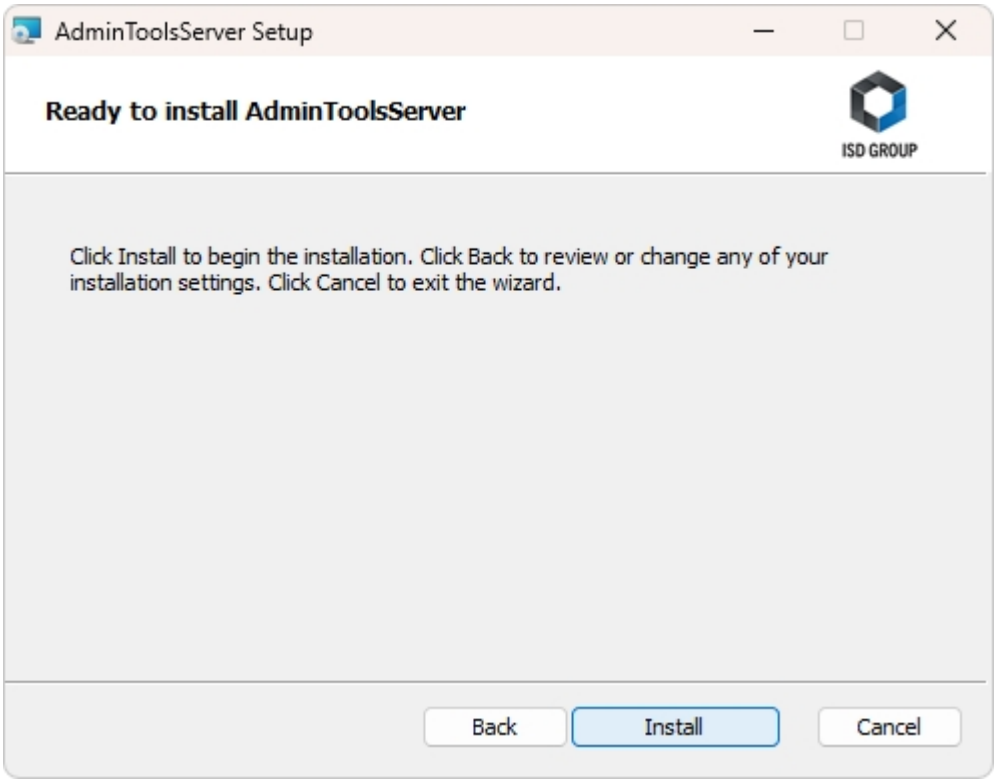
First, the system checks whether the Sentinel RMS License Manager is installed. If not, you need to install it.



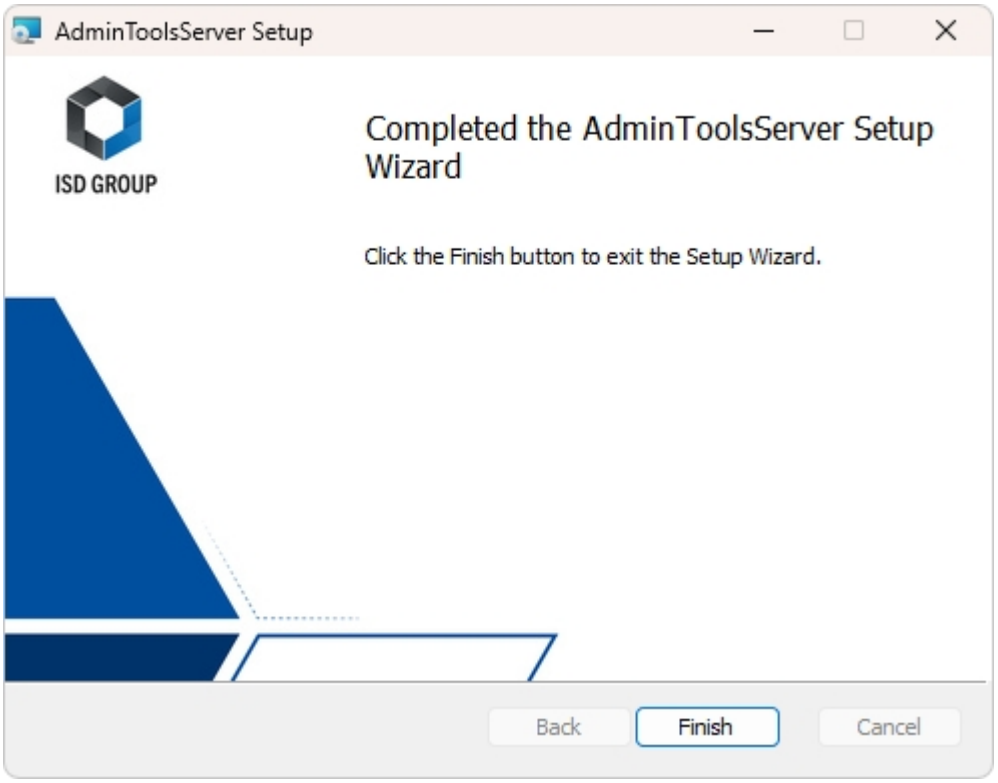
Activate the **Next** button.



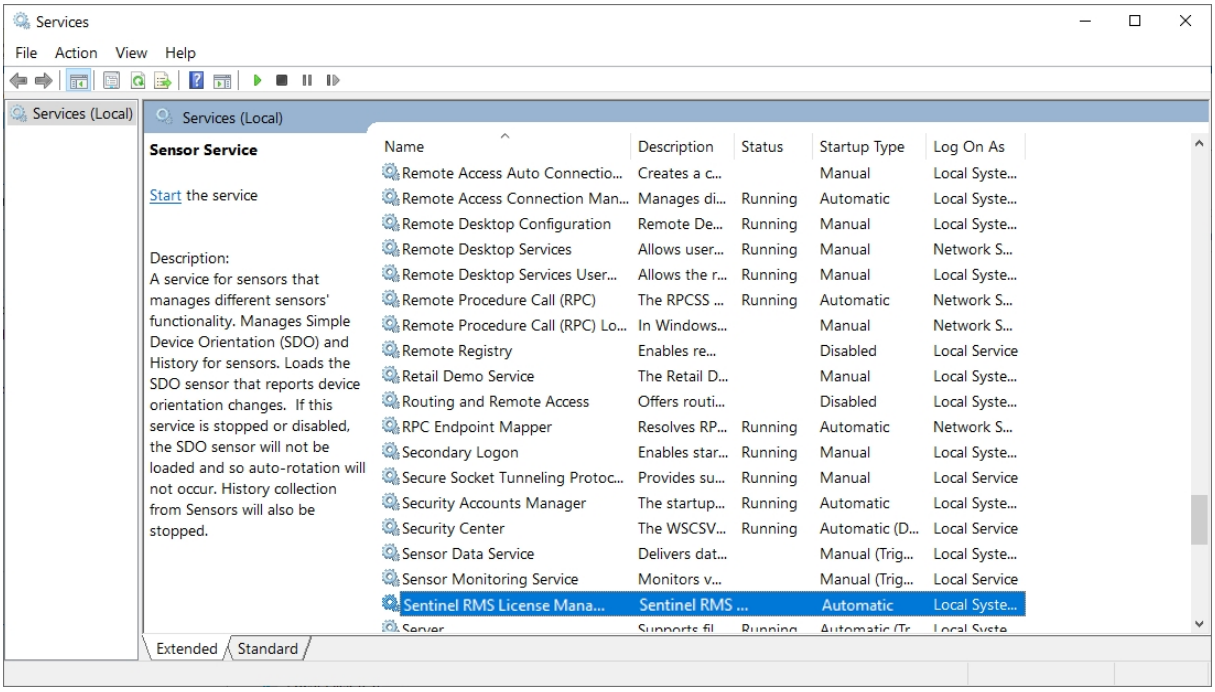
Accept the default path by clicking **Next**.



Then start the installation process.



After successful installation, you will find the Server service (Sentinel RMS License Manager) under Services. You can also start or stop it there. The **ISD License Manager (Server)** is located in the Windows Start menu. The program file ISDLicenseManagerAdmin.exe is located by default in the C:\Program Files\ISD\AdminToolsServer\exe\.



Important:

To ensure that the HiCAD PDM Client will find the correct License Server, an environment variable LSFORCEHOST should be set on each Client using network licenses. The value HOSTNAME, respectively the IP address of the License Server is assigned to the variable.

Licensing via Entitlement ID (License Activator)

The ISD License Manager significantly facilitates the communication between the customer and the ISD during licensing.

Important:

To activate HiCAD PDM, you always require the ISD License Manager that matches the version you use. For local client licenses, this is the ISD License Manager (ISDLicenseManager.exe) from the EXE directory of the HiCAD PDM installation. For server licenses, use the ISD License Manager (Server) (ISDLicenseManagerAdmin.exe), which is located by default in Program Files\ISD\AdminToolsServer\exe.

AutoRequest Licenses

When acquiring a HiCAD PDM license, you will obtain one Entitlement ID for local licenses (Standalone) and another one for network licenses (Network). If you have several network servers, e.g. at different locations, you will obtain one Entitlement ID for each network server. These numbers will be required for the activation and deactivation of the licenses and the software modules.

Von: ISD Group | Licensing [mailto:activation@isdgroup.com]
Gesendet: 11/02/2026
An: info@mustermann.com
Betreff: ISD - Entitlement Certificate

Dear Herrn Mustermann,

Congratulations! An entitlement has been created/modified for you with the following details:

Click here to obtain information on the license activation procedure.

Entitlement Details

EID:	cd14e6c7-c78d-cc8a-a05c-0a114ccccc60b6	**Start Date:**	11/02/2026
Customer:	Mustermann GmbH	**End Date:**	Never expires
Contact:	info@mustermann.com		

Associated Products and Features

Product Name	Item number	Quantity	Remaining quantity	Start Date	End Date	Status	License type
HiCAD 3D Worker	E102SPO001 31.99	1	1	11/02/2026	Never expires	Enabled	Network
HiCAD 3D steel engineering package	E103ATS2004 31.99	1	1	11/02/2026	Never expires	Enabled	Network
HiCAD 3D steel engineering suite premium	E103STB2010 31.99	1	1	11/02/2026	Never expires	Enabled	Network
HiCAD 3D Integration Module	E180CAH2001 31.99	2	2	11/02/2026	Never expires	Enabled	Network
HiCAD PDM engineer from	E181HEL2010 31.99	2	2	11/02/2026	Never expires	Enabled	Network
HiCAD PDM Jobserver	E183SPO2001 31.99	1	1	11/02/2026	Never expires	Enabled	Network
HiCAD 3D Point Cloud	F107PUW2001 31.99	1	1	11/02/2026	Never expires	Enabled	Network
Master License	MasterLic 31.99	15	15	11/02/2026	Never expires	Enabled	Network

For further assistance, contact us using the following details:
Contact No. - +49-(0)231-9793-0
Email - support@isdgroup.com

Sincerely,
ISD Software und Systeme GmbH Team

2016 SafeNet, Inc. All Rights Reserved.

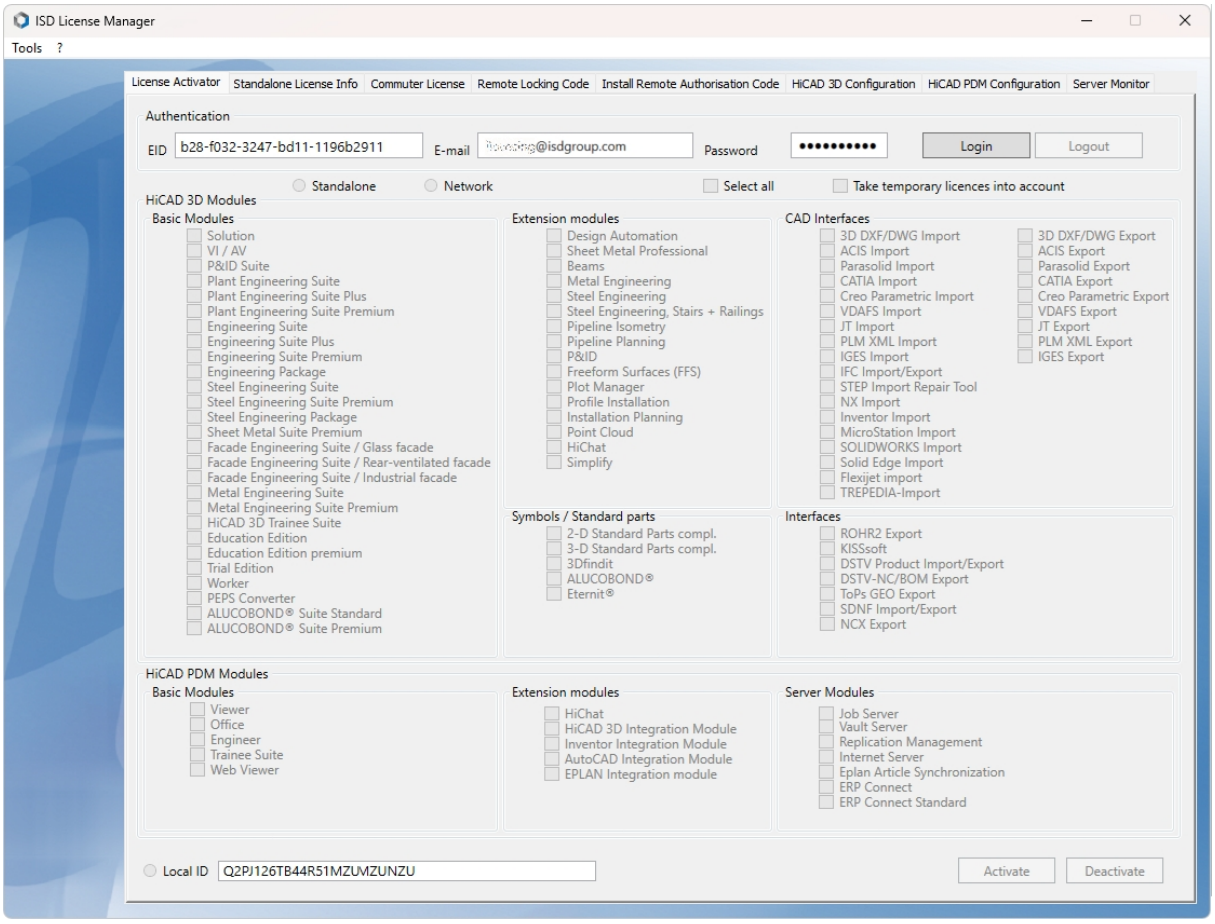
Important:

Please keep the Entitlement ID! Without this number you cannot activate or deactivate licenses. In case of a system crash a reconstruction of the licenses cannot take place without the Entitlement ID.

After installing HiCAD PDM you can find the program in the Windows **Start** menu under **HiCAD PDM**. Please note that for the execution of some functions, administrator rights are required.

The functionality of the ISD Licence Manager depends on whether the **Licence Administration Tools** option is selected during installation. You will need the **Licence Administration Tools** to manage server licences. If you select the **Licence Administration Tools** option when installing HiCAD PDM on the workstation (client), the **Server Monitor** (shows which users are currently using which licences) and **Commuter Licence** (borrowing a licence, e.g. for a laptop) tabs will be enabled in the client's ISD License Manager.

Important:
To activate HiCAD PDM you always need the ISD Licence Manager that corresponds to the version. For local client licences, this is the ISD Licence Manager (ISDLicenseManager.exe) located in the EXE directory of the HiCAD PDM installation. For server licences, use the ISD License Manager (Server) from the installation media for the HiCAD PDM version you wish to activate.The default installation of the ISD License Manager (Server) (ISDLicenseManagerAdmin.exe) is located in Program Files\ISD\AdminToolsServer\exe.



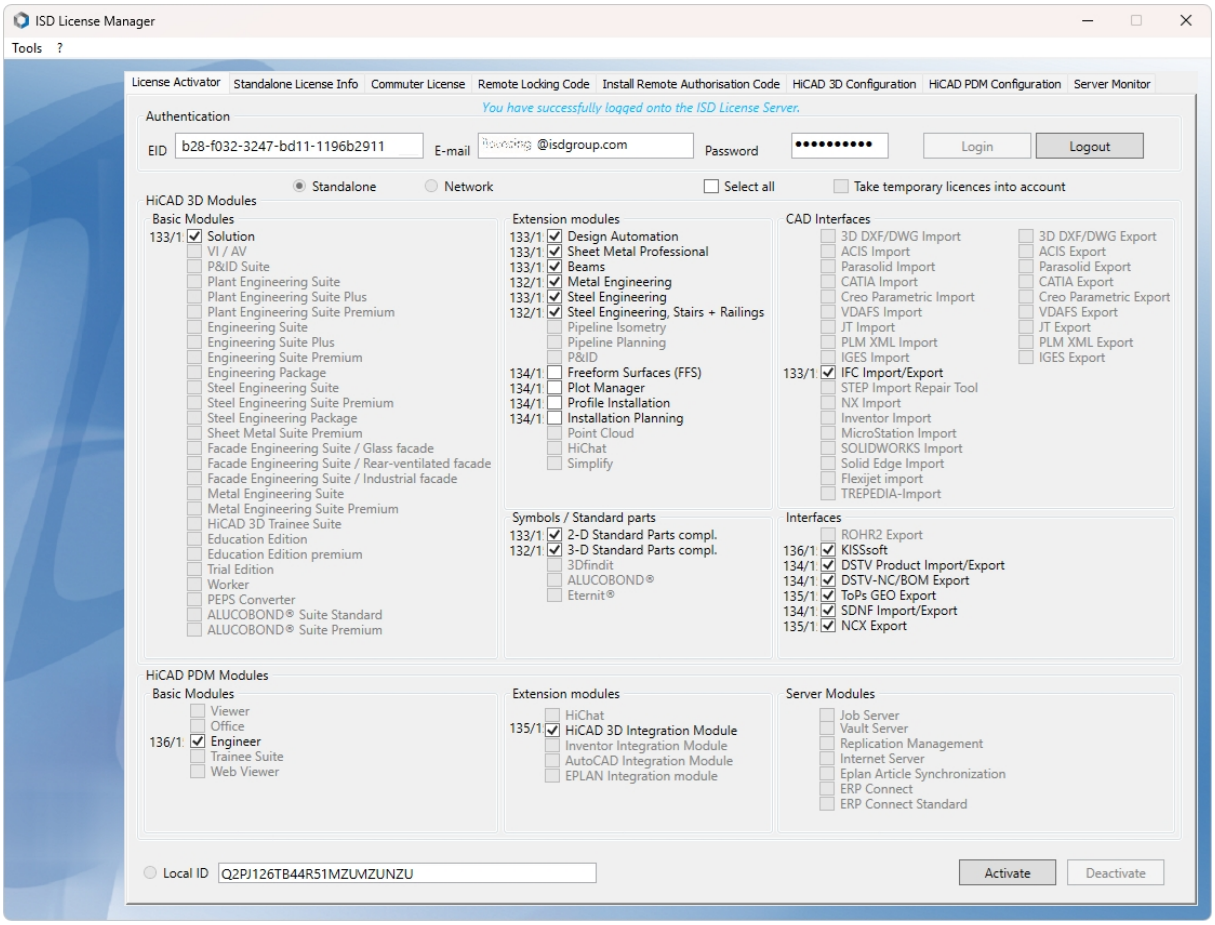
Activate the **License Activator** tab and enter the **Entitlement ID**, your **E-mail address** and your **Password**. New customers obtain their password from the Support. With this password you can also access the Download Area.

After entering the data, click **Login**. The ISD License Manager connects to the ISD License Server and the acquired licenses will be displayed.

This process may take several minutes. You can then activate the licenses.

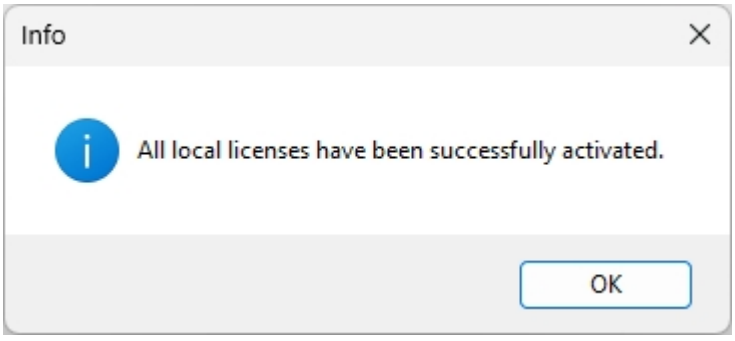
Activate Licenses

After successful Login the number of available licenses and the number of acquired licenses are indicated next to each module.



Select the modules to be activated and click **Activate** to start the activation. For Server Licenses the modules are already pre-selected.

After successful activation a message showing you that all licenses have been successfully activated will be displayed:



You can then log out and work with the HiCAD PDM modules.

In addition, you will receive an E-mail informing you about the deactivated modules.

For Network Licenses, all modules will always be activated or deactivated (for further information about the operation of the License Manager, please read the Online Help for the License Manager).

Deactivate Licenses

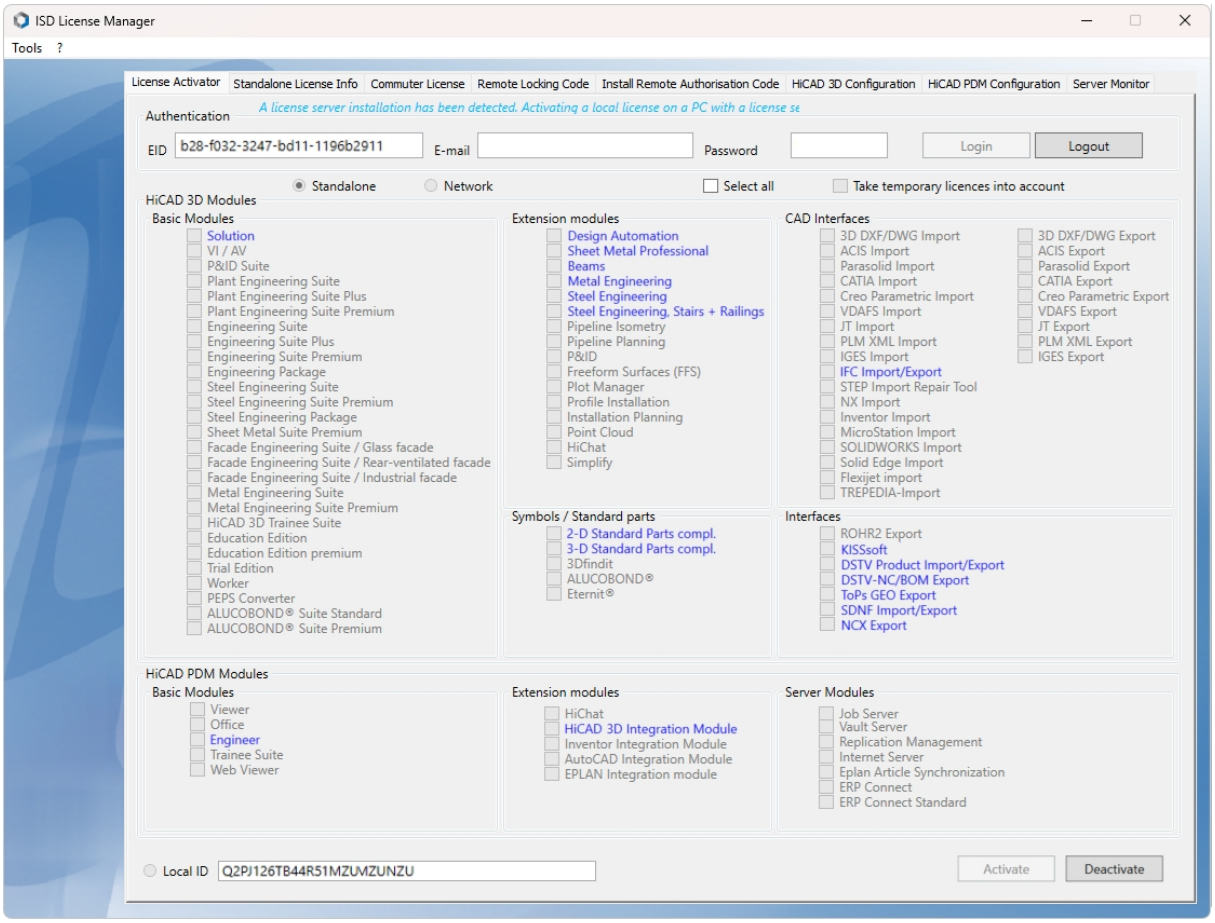
A deactivation of licenses for modules will be required in the following situations:

- Exchange of hardware or changing of hard disk partitioning
- Update of the operating system,e.g. from Windows 10 to Windows 11). For updates within one version no deactivation will be required.)
- Transfer of local modules from one workstation to another
- Acquisition of further modules, or return of hired licenses
- Switch from local licenses to network licenses

Please note the following: All workstations with modules having the same Entitlement ID need to be deactivated completely before a redistribution of the module licenses can take place.

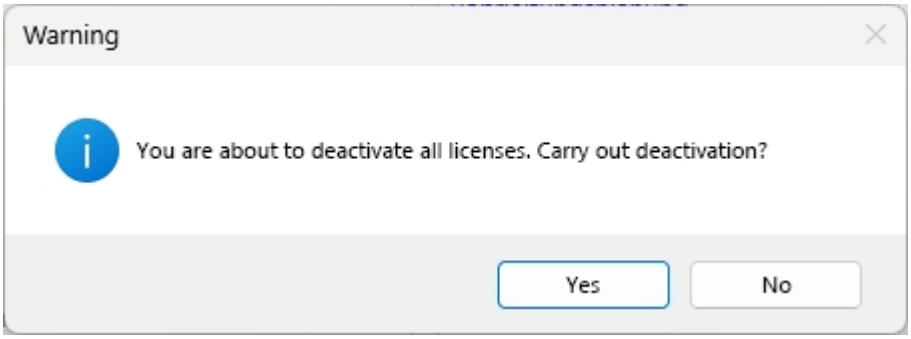
Close all HiCAD PDM applications before deactivating local licenses or logging onto the License Manager.

After starting the ISD License Manager the activated modules will be highlighted in a different colour.



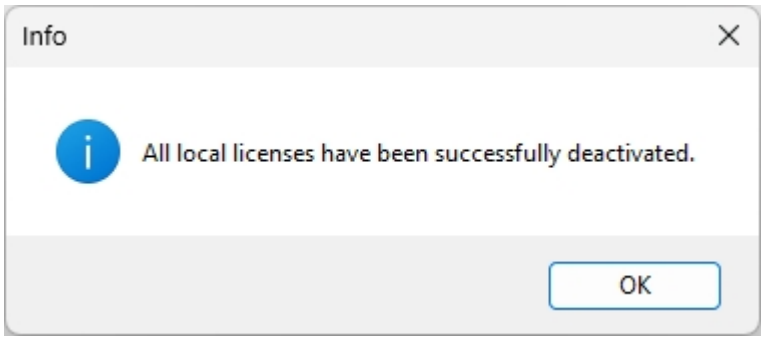
Click the **Deactivate** button to revoke the activation of the modules.

A selection is not possible, as you need to deactivate all modules, no matter whether local licenses or network licenses. The deactivation process must not be disrupted, e.g. by a logout or the closing of ISD License Manager!



Click on **Yes** when the security prompt appears.

After successful deactivation the following message will be displayed.



Temporary Licenses

If you select **Take temporary licences into account** after login, you will be also shown, besides all trial licenses with a limited period of validity, all purchasable licenses which are not simultaneously available as trial licenses.

Reconstruction of Licenses

As all licenses are stored on the ISD Server, you can, in case of an interrupted connection or an accidental deletion of licenses, restore all licenses by logging in with your Entitlement ID. The restoring will only function if the hardware was not changed (see Deactivate Licenses).

Notes on the Use of Mobile Computers (Laptops)

If you use a computer with WLAN card, Please make sure that the WLAN card is either always switched on, or always switched off.

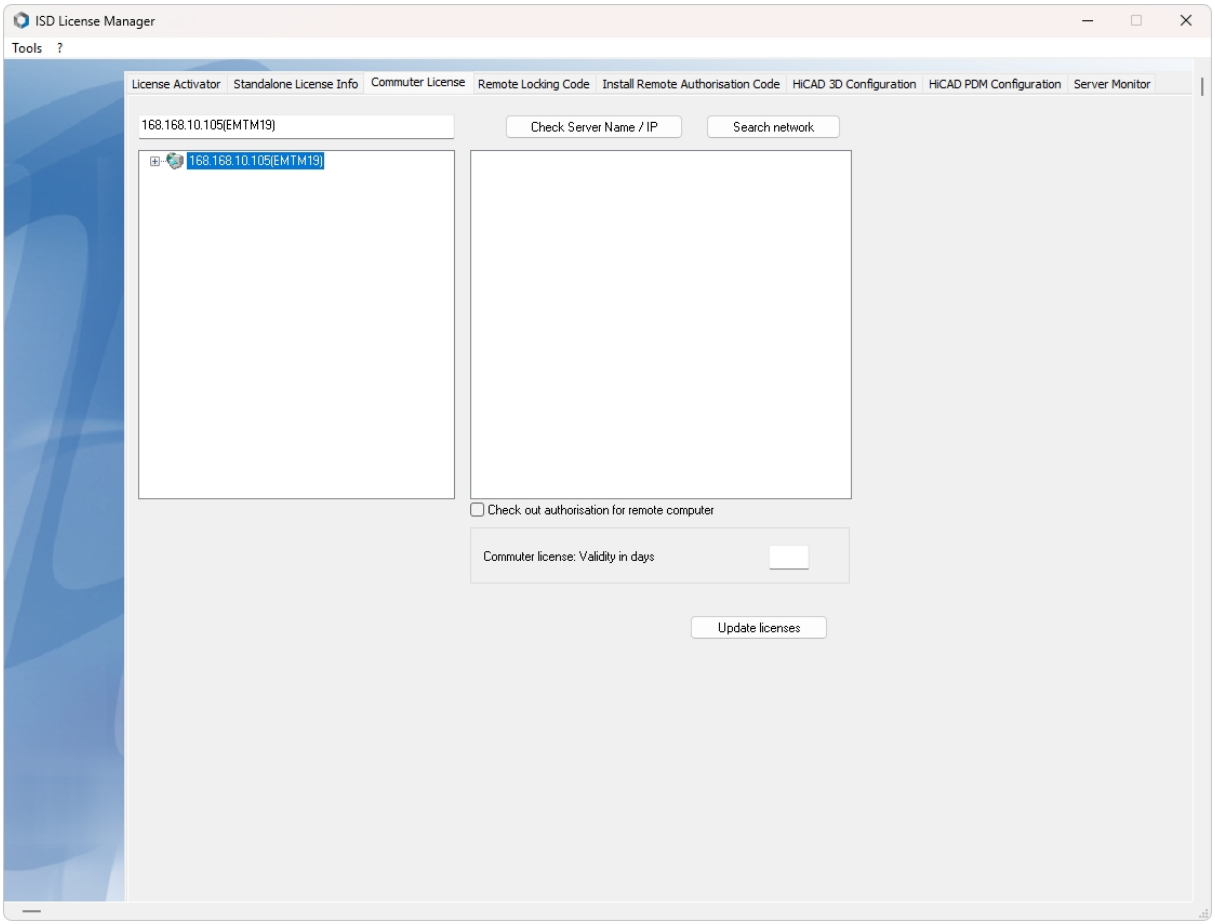
Commuter Licenses

Commuter licenses enable you to use network licenses even if the workstation is not connected to the Server. There are two ways of receiving commuter licenses:

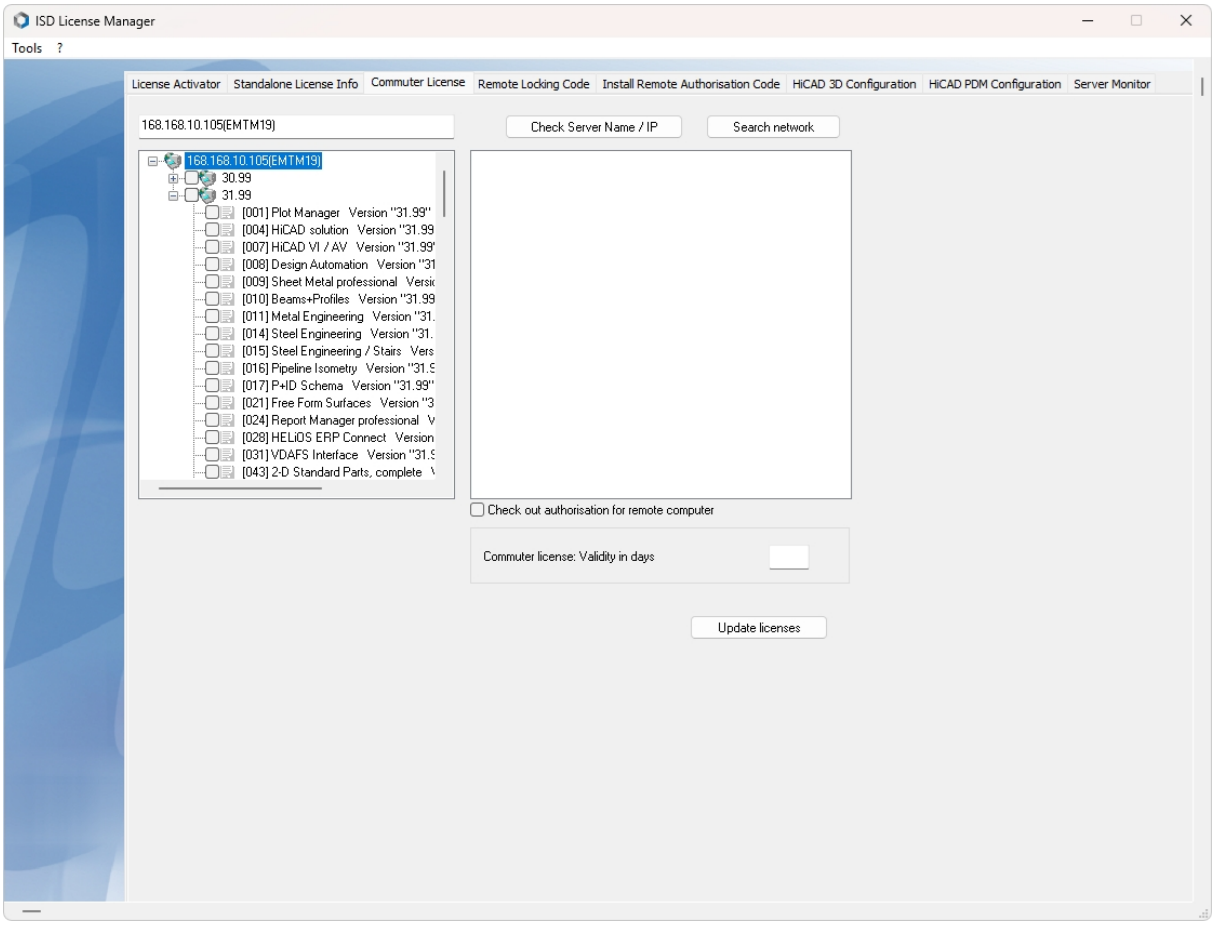
- Checking Out Commuter Licenses, with Network Connection
- Checking Out Commuter Licenses, without Network Connection

Checking Out Commuter Licenses, with Network Connection

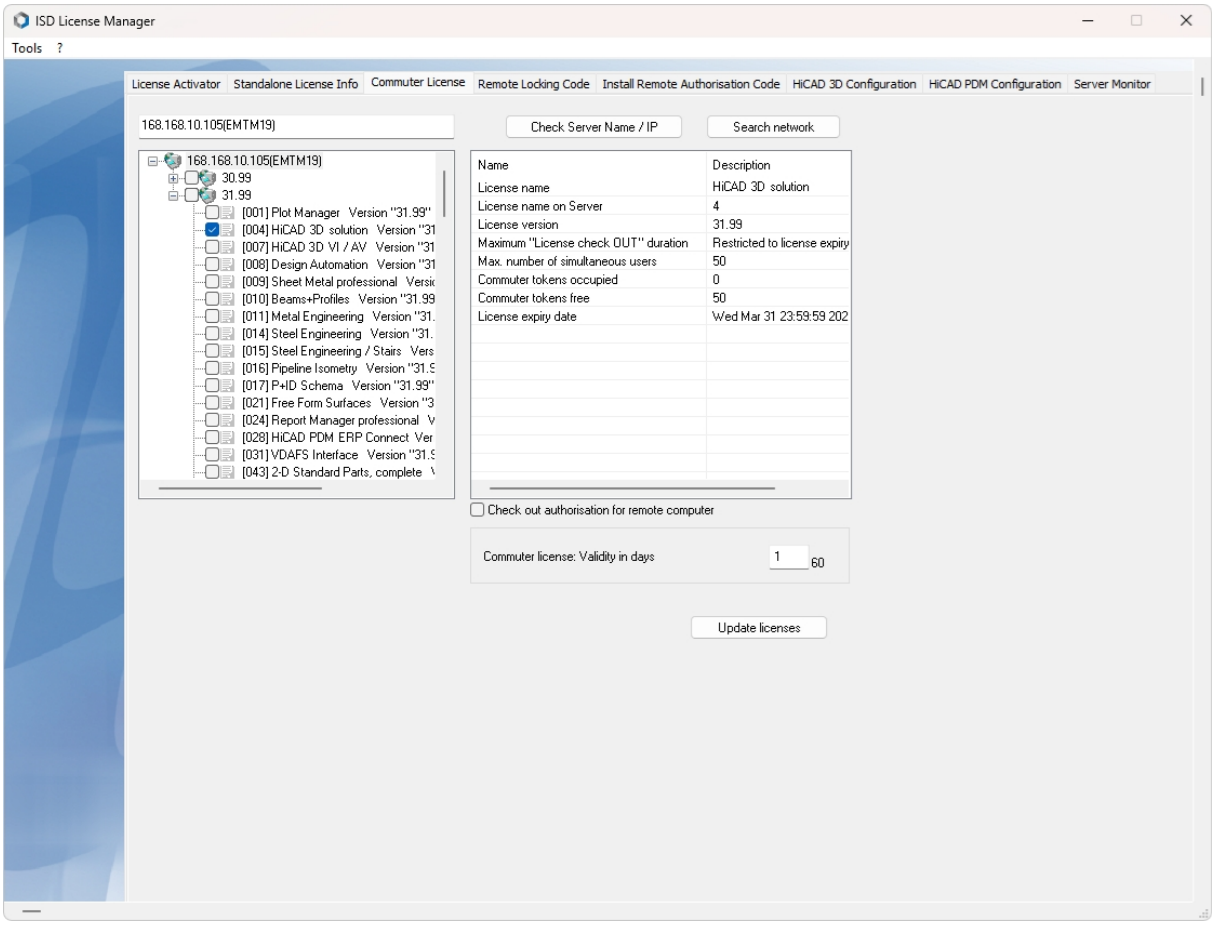
Start the **ISD License Manager** (while a connection to the Server still exists). Switch to the **Commuter License** tab.



Use the **Search network** button to automatically search for License Servers. Expand the tree structure of the found Server by a click on the “+”-sign. All Versions will then be shown on the License Server. The result looks as follows:



Select the required licenses by activating the corresponding checkboxes on the left hand side.

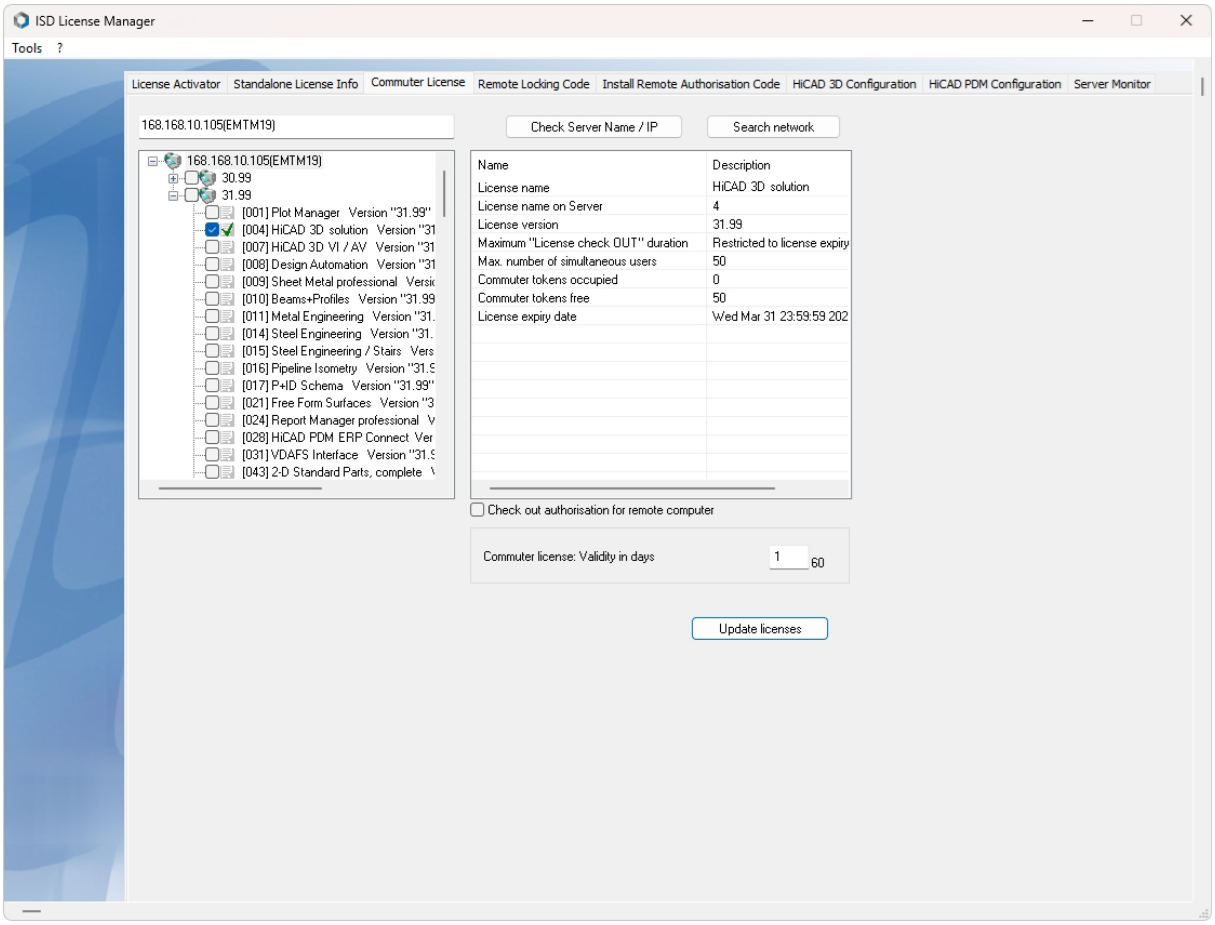


On the right hand side, information on the selected license is displayed.

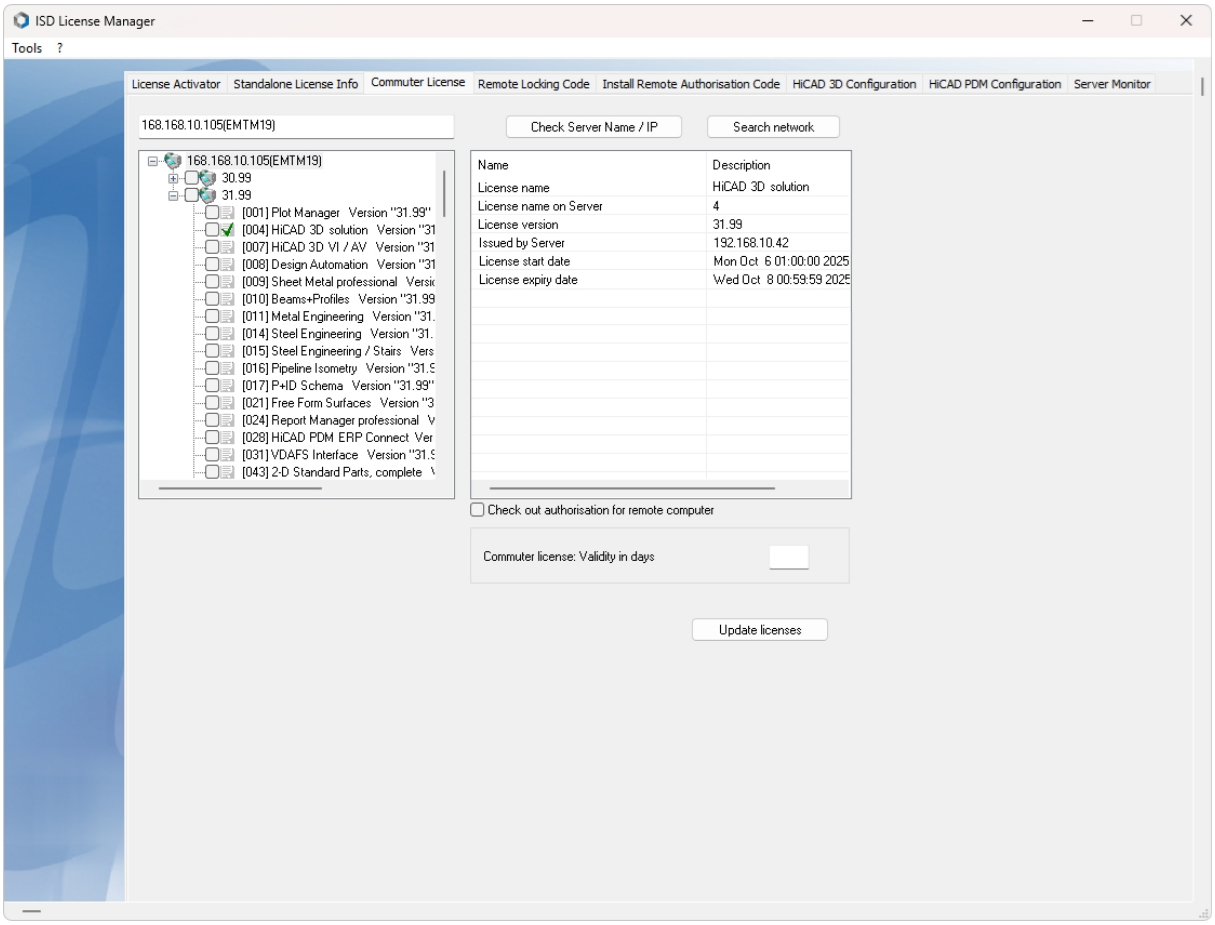
In the **Commuter license: Validity in days** field, you enter the number of days that you want the commuter licenses to remain checked out from the Server. The maximum number of days is 30. By default (or if a “0” is entered), the value is set to 1.

For reasons of safety you should check out the licenses only for the required period! If a commuter license is lost, e.g. because of theft or a defect of the client computer, the license on the Server cannot be used any more before expiry of this date.

After entering the expiry date for the commuter licenses, click the **Update licenses** button. The Commuter licenses are checked out from the Server.



All selected licenses are now checked out from the Server and you possess all rights on your computer for the specified validity period for the commuter licenses. This means that you are enabled to work network-independent. The checked out licenses are no longer available to the other computers on the network.



You can however also return the commuter licenses before their expiry date. To do this, you need to connect to the Server, deactivate the checkboxes on the left and click the **Update licenses** button. All licenses are now made available on the Server and locked on your computer, i.e. you can now only use HiCAD PDM if there is a connection to the License Server. The licenses made available again can now also be used from other workstations.

Checking Out Commuter Licenses, without Network Connection

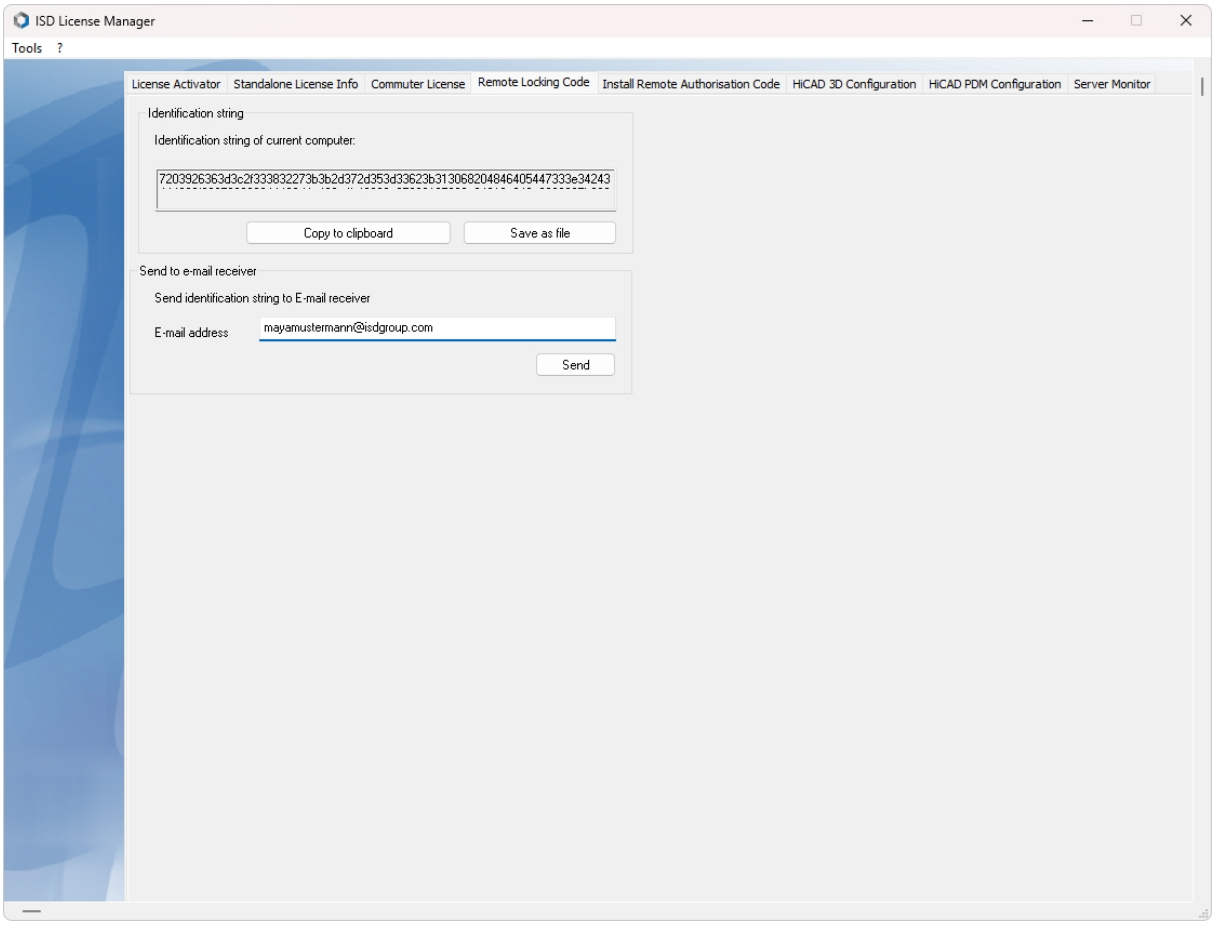
Commuter licenses can also be drawn from the License Server without an existing network connection. For this **Administrator rights** are required.

Commuter licenses checked out in this way cannot be returned to the License Server! This means that the commuter licenses that have been checked out from the Server are only (automatically) made available again after their expiry date.

Several steps are required for checking out without network connection - by the Administrator having a network connection to the License Server, as well as by the Client (that is, your laptop) having no network connection to the License Server.

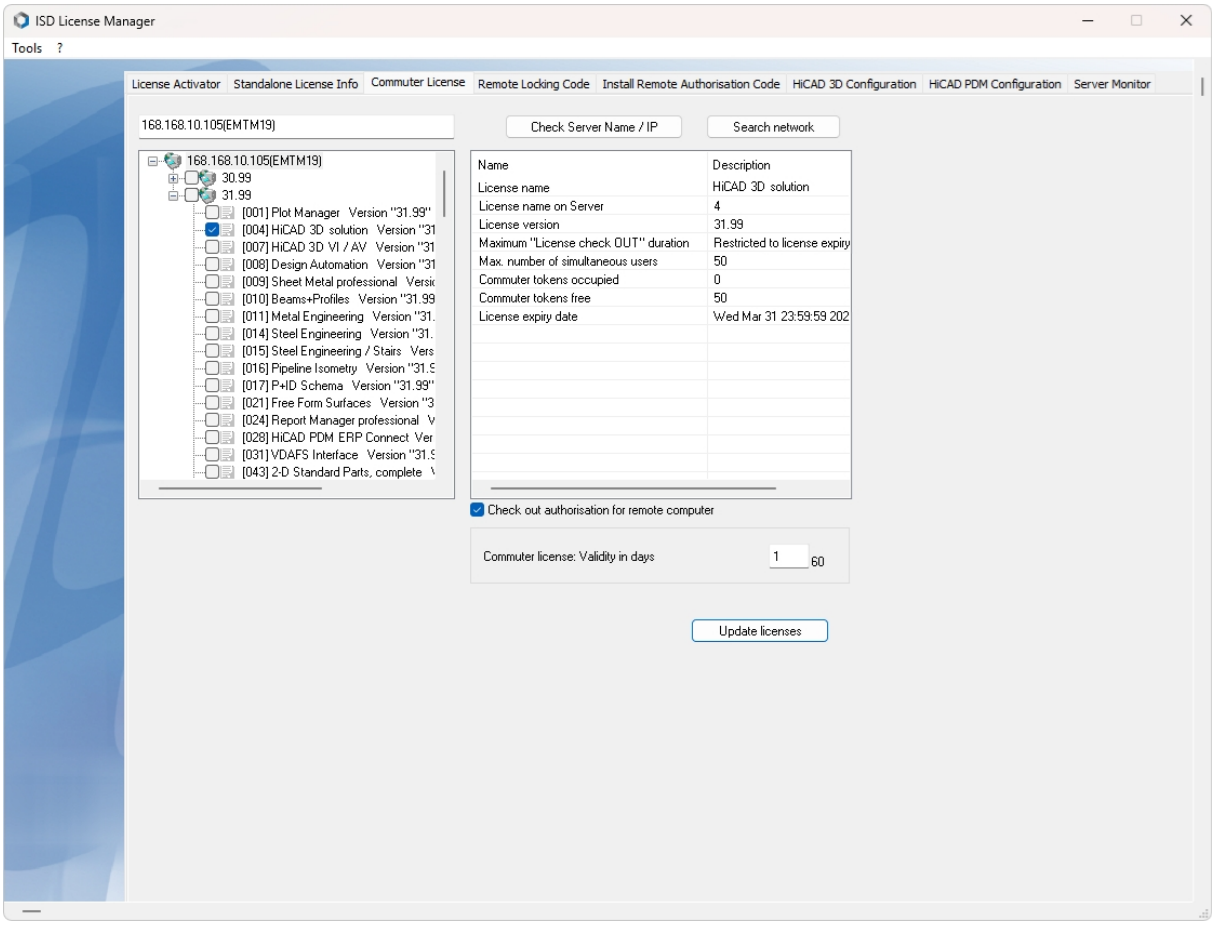
As long as commuter licenses are checked out in this way, it is not possible to update the network licenses on the server. The same applies when buying new modules/licenses and changing the configuration.

The Client starts the **ISD License Manager** tool, switches to the **Remote Locking Code** tab.



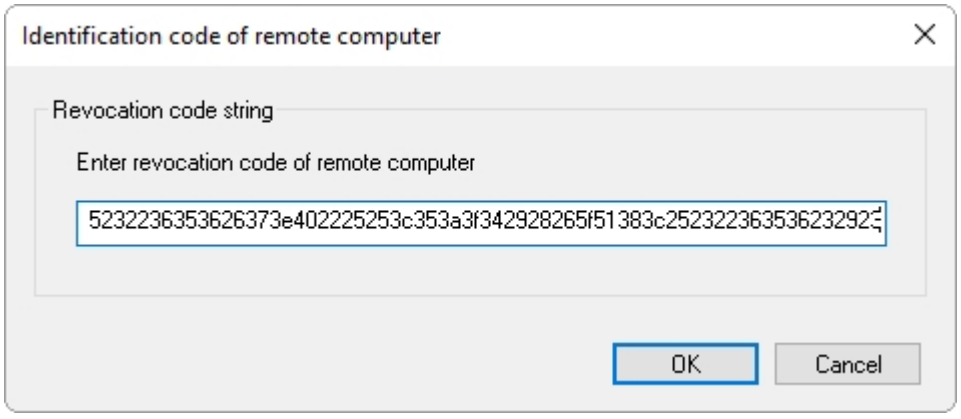
Then, the Client sends the generated character set to the Administrator (via E-mail or over the phone).

The Administrator starts the **ISD License Manager** and switches to the **Commuter License** tab.

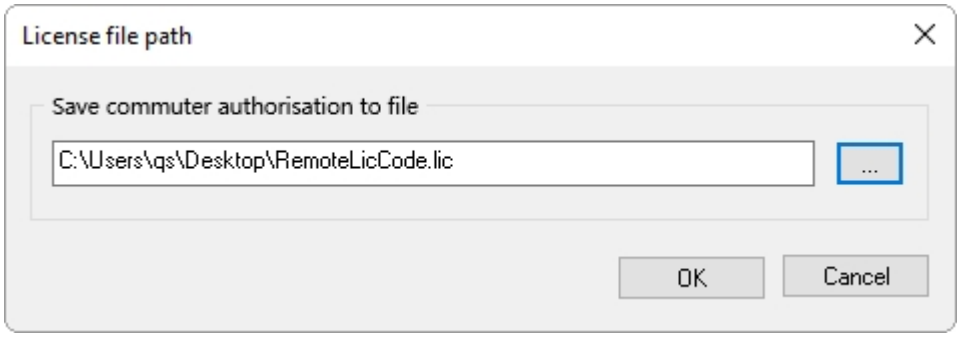


The License Server will be selected, and the required licenses (modules) are activated in the left window. In the **Commuter license: Validity in days** field, you enter the number of days that you want the commuter licenses to remain checked out from the Server. The maximum number of days is 30. By default (or if a “0” is entered), the value is set to 1. To checkout a remote commuter license the administrator now needs to activate the **Check out authorisation for remote computer** checkbox ☑. Administrator rights are required for this.

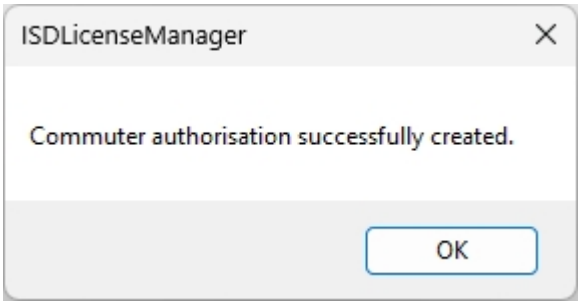
A click on the **Update licenses** button opens a new dialogue window, in which the administrator enters the character set received from the Client



After selecting **OK**, another dialogue opens.

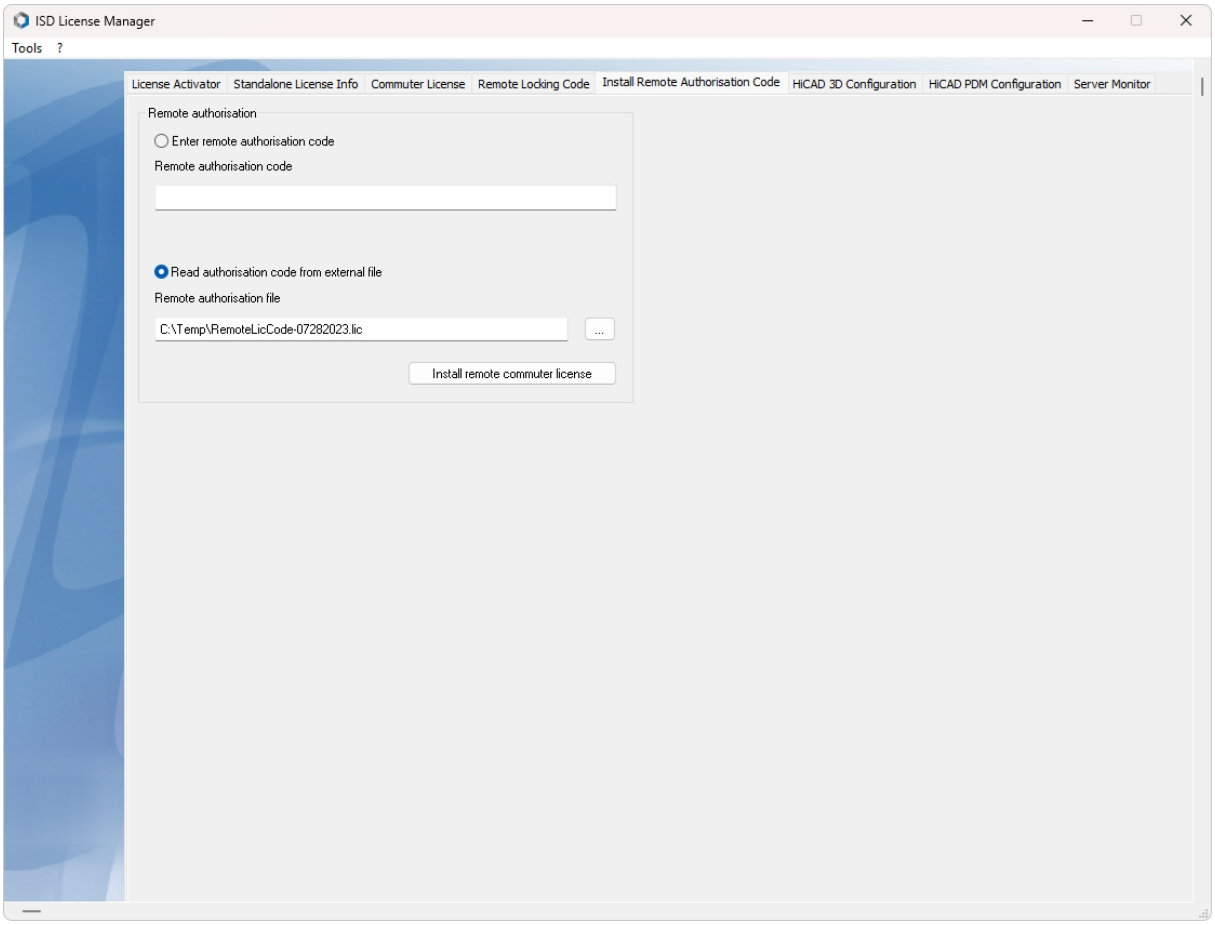


Here the Administrator enters the target path and the file name for the licenses to be swapped out. Make sure that a unique file name is used, for example, by including in the file name the host name of the remote computer and the expiry date.

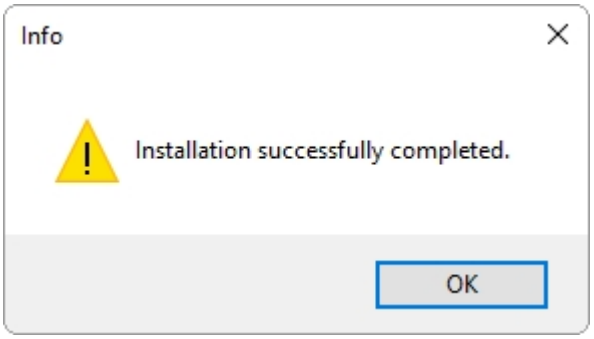


Click **OK** to check out the commuter licenses from the License Server and swap them out to a file, e.g. RemoteLicCode.lic.

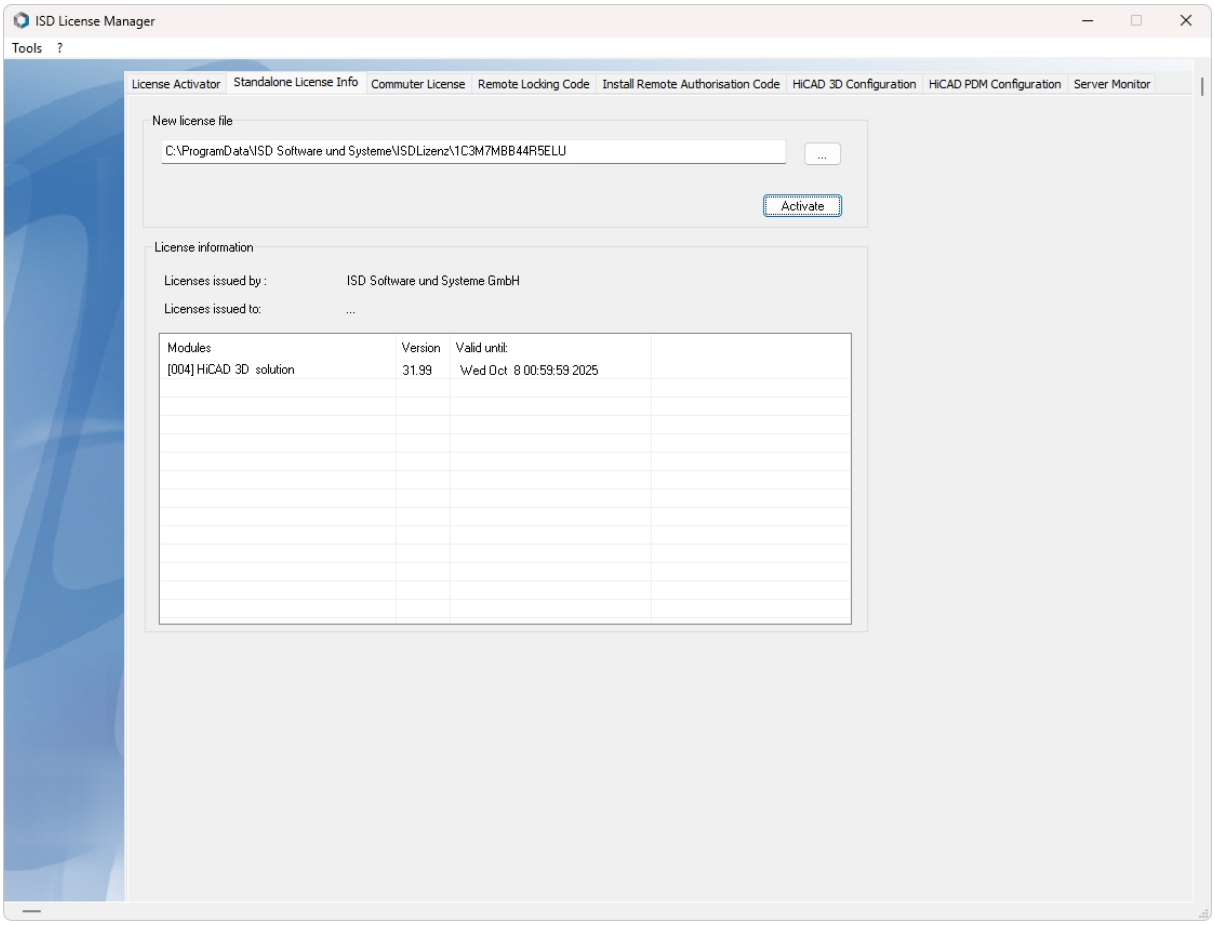
After receiving the file with the commuter licenses, the Client starts the **ISD License Manager** again and activates the **Install Remote Authorisation Code** tab.



Now the Client can install the received commuter licenses directly via file selection or via copying of the file contents. Click the **Install Remote Commuter License** button to install the Commuter Licenses on the Client.



After successful installation, the Client must switch to the **Standalone License Info** tab.



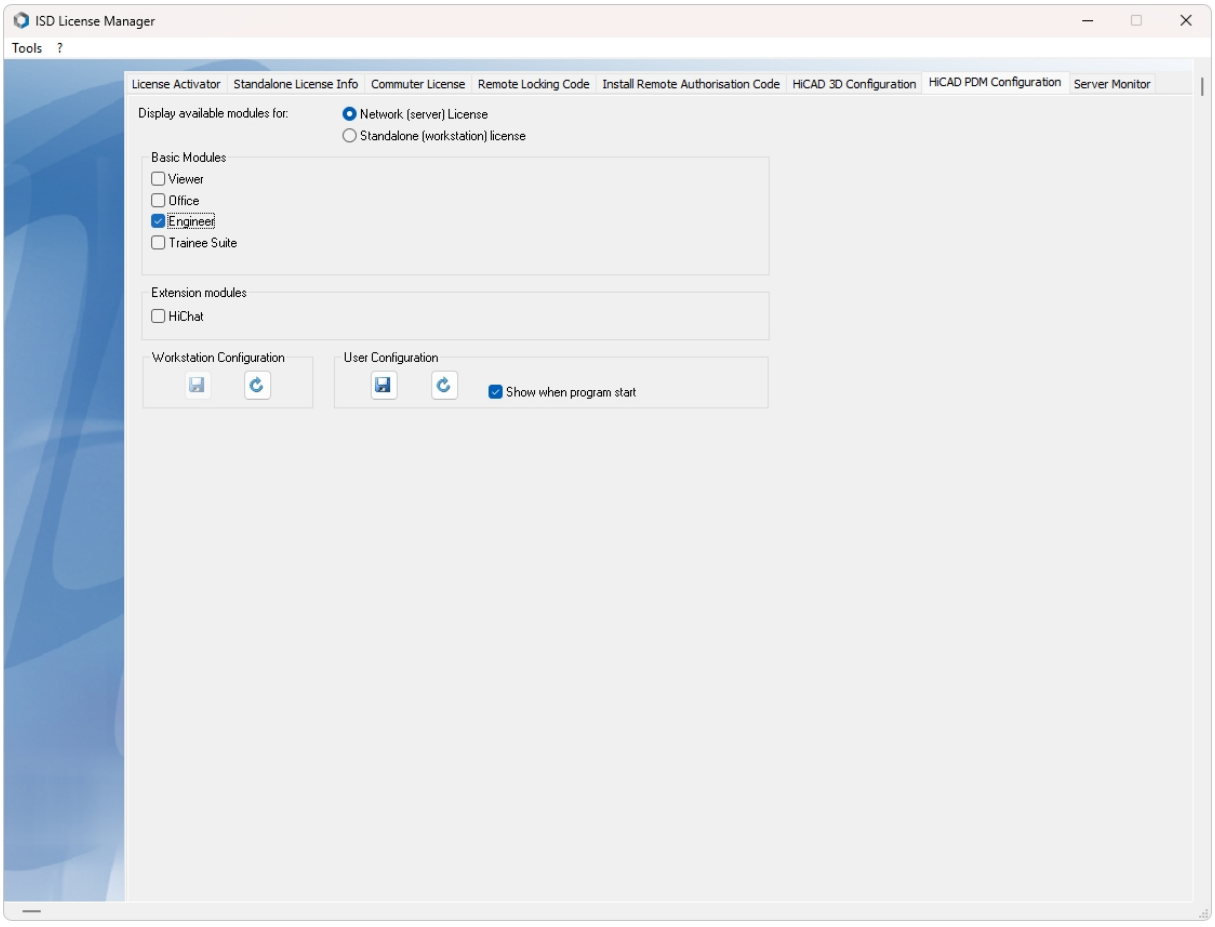
To update, the Client must click on the **Activate** button. The information which licenses are installed locally on the computer will then be provided to the Client.

License Configuration

Some cases may require the use of only certain specific licences on a computer. Example: On the Server ,HiCAD PDM Office and HiCAD PDM Engineer licenses are available.

On one Client, HiCAD PDM is to be started with a HiCAD PDM Office license; on another Client, with a HiCAD PDM Engineer license. If the selected license is no longer available, an application start is no longer possible.

If there are several basic modules in a standalone (workstation) license (to which also the Commuter Licenses belong), it is mandatory to make a pre-configuration and save it as workstation configuration. If no pre-configuration is possible, the HiCAD PDM configuration tab will be displayed before the start of HiCAD PDM. If the selected configuration does not match the available licenses, a warning message will be issued, with a list of available licenses. After this, the configuration selection will be displayed again.



On the **HiCAD PDM Configuration** of the **ISD License Manager** tool you have the option to save a workstation or user configuration for individual Clients.

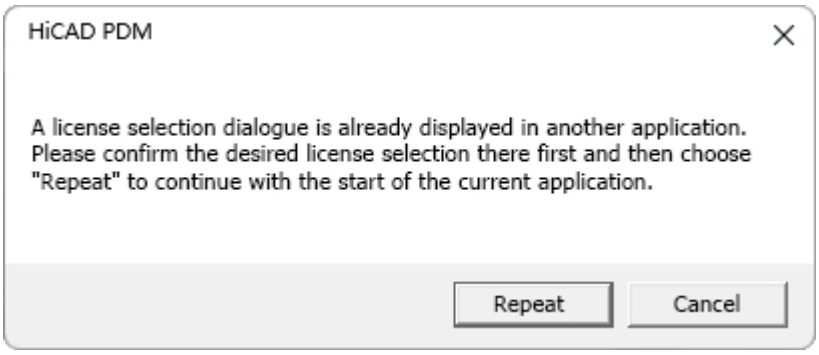
- **Save as workstation configuration**: This configuration will be saved for all users of this computer. When HiCAD PDM is started, the selection window is no longer displayed (administrator rights are required for this).
- **Save as user configuration**: If the **Prompt on program start** checkbox is activated when saving the user configuration, the licence selection screen will appear when HiCAD PDM is launched. If the licence selection is saved with the checkbox deactivated, the selected configuration will be used and you will not be prompted again when the program starts.

These license configurations apply to network licenses and standalone (workstation) licenses.

Licence selection with parallel product start

If you start several applications without licence selection (e.g. without workstation configuration) one after the other, the system checks whether a licence selection dialogue is already displayed in another application. If this is not the case, the dialogue is displayed.

If another licence selection dialogue is already displayed, then you will receive the following message:



The **Repeat** button checks whether another licence selection dialogue is started at the same time. If yes, the same information dialogue appears again. If not, the start (and possibly the display of the licence selection dialogue) is continued.

Use the **Cancel** button to end the start of the application.

Please note:

If no licence could be reserved for the HiCAD 3D integration module, only viewing functionalities are available in the HiCAD PDM, regardless of the selected basic module.

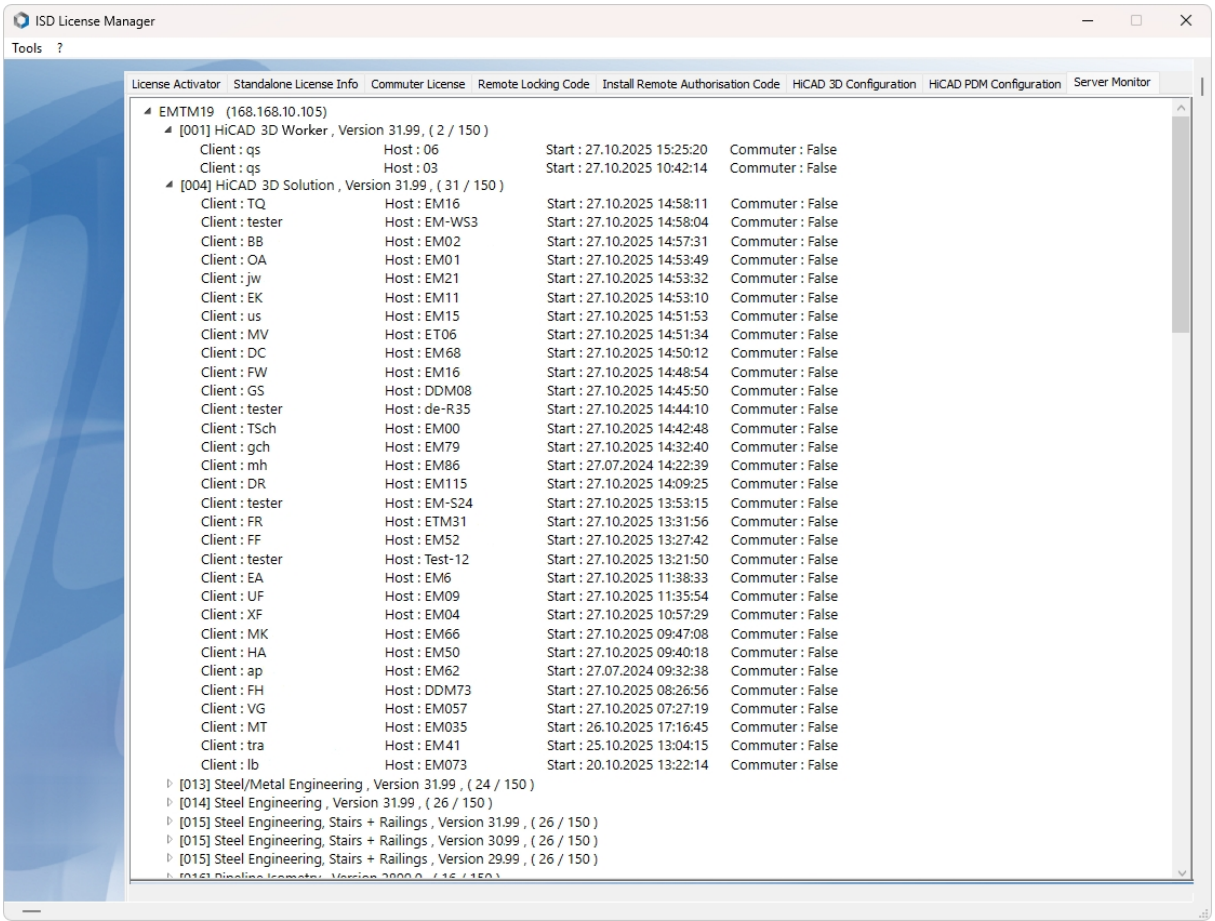
Server Monitor

With the ISD License Manager tab **Server Monitor** you are allowed (as far as you are able to execute ISD License Manager) to view detailed information as follows:

- Listing of available modules with module description (e.g. “Element Installation”). Relevant is the License Server which the user is connected with.
- Apart from the module description, the maximum amount of available licenses as well as allocated licenses is displayed.
- You can open up the available modules and here the users using the respective license are displayed.
- The listing of users using a license also shows which user is connected with the License Server and which user uses a Commuter License.

By listing the licenses you can easily see who blocks licenses and, for example, easily speak to them in case if you need a license.

In the installation program, the tab **Server Monitor** is activated by clicking on the option **Activate license administration tools**.



Theft of a Workstation

The user is responsible for appropriately insuring the HiCAD PDM workstations against theft. If desired, we can tell you the reinstatement value of your software. If a workstation is stolen, you will need a new license. In such cases, please send us the police report of the theft first. We will then provide you with a license for a limited period of time, and submit an offer for a new license to you. The ISD will send you the new license after clarification of the case with your insurance and receipt of your payment for the license fee.

First Steps

- HiCAD PDM at a Glance
- Start HiCAD PDM
- What's New in Version 2027?

HiCAD PDM at a Glance

On the way to the finished product, invested time, spent costs and product quality can only be optimised if all departments of a company cooperate efficiently. This requires a well-structured and efficient exchange of information between the parties involved in the production process - from Manufacturing, Purchasing and Service to Marketing and Sales.

HiCAD PDM is a state-of-the-art PDM/PLM system providing all essential tools for an error-free gathering, management and distribution of the data required for the production process chain. Once saved, these data can be re-used within the entire company and for the complete product life cycle. HiCAD PDM manages and controls all process cycles by regulating and monitoring the processing and transfer of these data.

By combining Product, Process and Peripherals Management in a single system, HiCAD PDM becomes the central “knowledge reservoir” of your company and guarantees transparent and secure processes.

HiCAD PDM can be interfaced with your CAD system or used as a stand-alone system, the so-called HiCAD PDM Desktop - either as a single workstation or at different locations.

Thanks to its modular structure, HiCAD PDM can be optimally adapted to company-specific requirements.

Start HiCAD PDM

Start the HiCAD PDM Desktop by double-clicking on the PdmDesktop.exe file or via the HiCAD PDM icon on the Desktop of your computer.

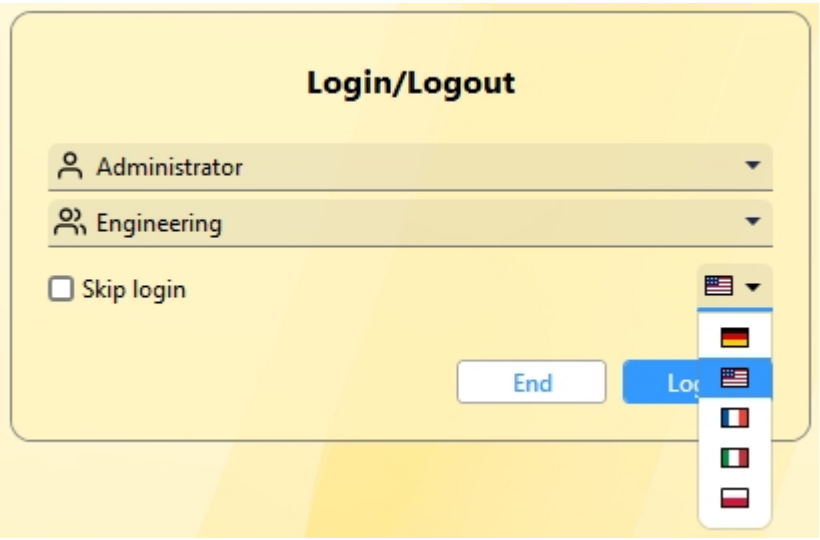
If you have not closed HiCAD PDM correctly during your last session, you will receive an error message from the Vault Server.

To make the best possible use of the numerous new features and enhancements offered by HiCAD PDM, check out the videos explaining the new and changed HiCAD PDM functionalities. From now on we will provide you with such videos with each Major Release and Service Pack to keep you constantly informed in the best possible way.

You can configure the display of the **News window** at the bottom left. Please note that you can configure the display of the News window at the bottom left. We recommend using the **Show most recent news** option to ensure that you will never miss any news about HiCAD PDM. If you selected the **Show never** option, you can call the News window again at any time and change the display option by clicking on the symbol at the top right and selecting **Show news**.

Login

The HiCAD PDM User Management is based on the User Management of Windows. Punctuation marks such as commas, apostrophes, square brackets etc. and special characters such as @ cannot be used in user names. If several users are registered with the same Windows User Name in the **User & Workflow Manager** (edbsetup.exe) , a login mask will appear when starting HiCAD PDM Desktop.



User name and active group enable the user to login with the rights guaranteed by the User Management.

If you select a project from the **Active project** drop-down list, this project will be opened after starting HiCAD PDM Desktop. If you select the project-independent setting, all documents will be displayed.

Start the HiCAD PDM Desktop with **Login**.

To ensure that a specific project is always opened after starting HiCAD PDM, click on the  icon at the top left of the HiCAD PDM Desktop and then select the **HiCAD PDM Options**. You can select a start project on the **General** tab.

Switch user

Use the **Switch user**  function for a renewed login while working with HiCAD PDM Desktop, e.g. to work with different rights without having to exit the program.

Activate the **Switch user**  function via the QuickAccess toolbar. Select a different user. Change the active project if required and confirm the new settings with **Login**.

What's New in Version 2027?

An extensive overview of all changes and enhancements of HiCAD 3D 2027 can be found in the **What's new?** topic of the Help. You can also click on the 

button in the Help.

An overview in PDF format will be displayed if you click on the 

button.

Calling the Help

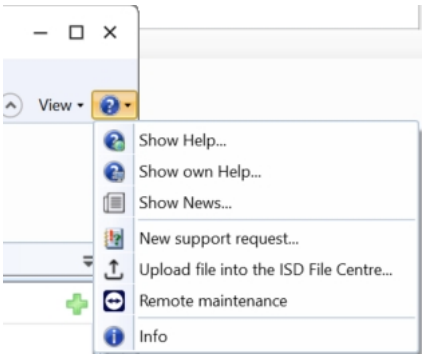
The Online Help contains information, descriptions and examples of the functions and techniques available in HiCAD 3D/HiCAD PDM HiCAD PDM.

Please note:
The range of functions available depends on the HiCAD PDM product you are using. This means that not all of the functions described in the Help section may be available in your system.

The Help is available on the Internet (regularly updated) at help.isdgroup.com. On this website, you will find concise information in the upper section. In the lower section, you can open the Online Help or, for example, the **Installation Notes** as a PDF file after selecting the respective version.

You can also start the Help directly from HiCAD PDM.

The HiCAD PDM Help can be accessed via the question mark symbol .



Please note:
For the functions of the ribbon and the drop-down menus, you can directly access the corresponding Help page by pressing the **F1** key.

Support

Even after implementation, the support team of the ISD ensures competent support of their customers. Besides support over the phone, all current means of communication such as E-mail (support@isdgroup.com) and Internet can be used. If any problems could not be solved in this way, our staff in all our offices will be there to help you at your company if required.

If all lines are busy, a voice mail system will be activated, allowing you to leave a message. Our staff will call you back as soon as possible. If a line becomes available during the recording of your message, your call will be accepted immediately. It is our ambition to solve your problems as quickly as possible and let you have the solution via phone or E-mail. A problem diagnosis will be made on the spot, and the existing problem will be dealt with and eliminated as fast as possible.

In cases where your problem cannot be solved immediately, we will call you back after analyzing the situation. Depending on the level of difficulty our Support team will also bring in the Development department.

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