

HELiOS - What's new?

Version 2023 News Overview Date of issue: 10/07/2023



isdgroup.com

TOC

Notes on HELIOS Updates	7
HELiOS Desktop	9
Service Pack 2 2023 (V 2802)	
Utilized articles	
Print locally	
Project and folder change behaviour in the Combined search	
Edit workflow status: Improved dialogue	
Attribute mappings for document input	
Import	14
Central configuration for date fields and time zone	
Performance	
Service Pack 1 2023 (V 2801)	17
Optimised search result lists	
Errors during printing or export	
Context menu entry for saving to HELiOS	
New data type for List attributes	
Installation DVD: Changed path of the default database	
Major Release 2023 (V 2800)	21
Units in the context menu	
Copy and paste attribute values with unit category	
Export and import files	
Print documents: File name configuration	
Index up-to-dateness	
HELiOS Options: Default configuration for product structure output	
Mark-up and Redlining	
Bill of Materials / Report Manager	26
Service Pack 2 2023 (V 2802)	
Edit template for export to Excel	
Extended Steel Engineering lists	
Dimension attributes Length and Width	
Extended bar list	
Templates for DSTV and ERPlus	
Major Release 2023 (V 2800)	
New ISD Report Manager	
User interface	
Export	
Head data setting	
Sort sequence	
Filter settings	
User-definable columns	
Excel-BOM with pipe length list	

HELiOS Options: Switching between previous and new ISD Report Manager	
New BOM templates for HELiOS	
HELIOS Spooler	
Service Pack 2 2023 (V 2802)	
Performance	
Result list attribute to mark documents being updated by Spooler	
PDF printing via Windows	
Service Pack 1 2023 (V 2801)	
Performance	
Major Release 2023 (V 2800)	
Support of RM3/ RMA files discontinued	
Server Monitor	
HELiOS Task Starter	
HELiOS Vault Server	
Service Pack 2 2023 (V 2802)	
Server Monitor: Communication port for article synchronisation during installation.	
Service Pack 1 2023 (V 2801)	
Server Monitor: HELiOS Article Synchronization.	
Major Release 2023 (V 2800)	
Server Monitor	
HELIOS MS Office Interface	
Service Pack 2 (V. 2802)	
Combined search	
Major Release 2023 (V 2800)	
Outlook: Attach preselected document	
HELIOS CAD/CAE Integrations	
Service Pack 2 2023 (V 2802)	
Extension of Batch update function	
Attribute assignments for user-defined object types	47
Workspace	
Query for direct saving when linking articles	
Service Pack 1 2023 (V 2801)	
HeliosCouplings	
Major Release 2023 (V 2800)	
Open, with options	
Batch update	
Discontinuation of older multi-CAD interfaces	53
HELIOS in HICAD	
Service Pack 2 2023 (V 2802)	
Automatic removal of documents from the HELiOS workspace	

Message if HiCAD Integration module is missing	54
IFC interface: Show HELiOS attributes	55
Service Pack 1 2023 (V 2801)	
Deleting the item numbers when deriving	
Open STEP file via HELiOS in HiCAD.	56
New article class for part type Welding neck	57
Major Release 2023 (V 2800)	
Transfer of the HiCAD sheet structure	
HiCAD-specific HELiOS settings moved to Configuration Editor	60
New ISD Report Manager.	
HiCAD - HELiOS Head ID	
HELIOS for AutoCAD	63
Major Release 2023 (V 2800)	
AutoCAD 2023.	
HELIOS for Autodesk Inventor	
Service Pack 2 2023 (V 2802)	64
Exchange / Exchange all	64
Major Release 2023 (V 2800)	
Inventor 2023	65
Exchange / Exchange all	65
HELIOS for SOLIDWORKS	66
Major Release 2023 (V 2800)	
Open, with options: Large design review	
Batch import	
Navisworks Interface	67
Major Release 2023 (V 2800)	67
Support of Navisworks 2023.	
HELIOS & EPLAN	
Service Pack 1 2023 (V 2801)	
Support of EPLAN 2023.	
Server Monitor: HELiOS Article Synchronisation	
Major Release 2023 (V 2800)	
Support of EPLAN 2022	
Improvements and extensions	
HELIOS for Zuken E3	
Service Pack 1 2023 (V 2801)	
Server Monitor: HELiOS Article Synchronisation	

Notes on HELiOS Updates

For an update to HELiOS 2021 (Version 2600) from a version older than 2500 a central update of the supplied HELiOS database is required.

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

Data backup before updating

Make sure that a data backup was made before carrying out the update of your HELiOS database. For the backup, either use the HELiOS Database Creator (further information can be found in the Installation Notes) or your SQL Server Application.

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

Log file for update

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

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

New mask format

Please read all notes on the new mask format introduced with HELiOS 2020!

MultiCAD interfaces

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

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

HELiOS Desktop

Service Pack 2 2023 (V 2802)

Utilized articles

In the context of the document detail window you will find the new result list tab Utilized articles.

This shows you the article contexts stored in the model structure for the document.

DN-000245 (Document), Project context: PN-01-06-K									- C	ı ×
General Assignments Input / Output										r 🖪 🔿
	Delete Edit									
${\sf Mask} \qquad \qquad \times \mid {\sf Documents} \times \mid {\sf Graphic} \qquad \times \mid {\sf Targets}$	× Use	× Sources	× Product st	tructure ×	Itilized articles	<				~
🔸 🐱 🍓 Standard 🛛 🗣 🌾 ち										
Article number In In W Designation	Part type	Designation	Standard designation	Creation dat	Created by	Length	N (inc	Weigł	Source or targ	jet link
SN-000006 🛛 💿 📀 Gearbox housing	Individual part			02.10.2006	Konstrukteur1			2.58	Bauteil-Kor	istruktion E
SN-000007 🛛 💿 🚱 Gearbox cover	Individual part			02.10.2006	Konstrukteur1			2.15	Bauteil-Kor	struktion E

In contrast to the model structure, this result list can be sorted and filtered more easily and articles can also be displayed consolidated, i.e. they only appear once in the result list, as is not possible in the context of the model structure due to its model tree and instance approach.

The articles listed there may deviate from the bill of materials (product structure) if, for example, you are working with assemblies that are not BOM-relevant.

For use cases such as the release of an assembly structure, the display of used articles based on the model structure, in the results list of the document context can therefore be very helpful.

Print locally

In the context menu of documents or in the Output tab of the document detail window you will find the new function

Print locally.

With this function you can print documents such as Office or PDF files from the HELiOS Desktop via the Windows standard printer.

The function can also be used for a multiple selection of documents. In this way, you can print documents from a result list in the present order without having to select them individually for printing via the HELiOS Spooler.



DN-00034	1 (Document), Proje	ct context: PN-01-06-K
General A	Assignments Inp	ut Output
Show Version Management	Send file by E-Mail	Print locally Print locally V Utput
Mask	× Extended mas	Print locally × Targets
		Print document(s) locally using the default printer
	Basic information	Press F1 to open the Help.

Project and folder change behaviour in the Combined search

In older HELiOS versions, when working with the **Combined search**, you could set the behaviour of how selected projects or folders are handled when the selection is changed: Should the change of a project or folder in a search mask also affect the other masks of the Combined search, should projects or folders be set individually on each mask, or should inactive search masks be set independently of projects or folders?

Old procedure: Combined search > Project change behaviour



With the update to HELiOS 2023 Service Pack 2, you will find the settings for this at **HELiOS Options > General**, under **General Settings > Find**.

This has the advantage, among other things, that this option can then also be exported / imported and made available as uniform behaviour on other computers.

	K HELIOS Options
General	General Settings
Display Result lists Project and Folder structures	Start project Project-independent I E Last active project
Print Import/Export Workflow Iog Database Document type HELiOS Desktop	 Start folder Folder-independent Clast active folder Multi-language attributes Selected language: en CHANGE Units Length display for inches and feet: American (in, ft) British (", ") Find
	 Show Classification tab in Find document/article dialogue Project change behaviour in combined search: Same project in all masks Different projects in all masks Always project-independent in non-active mask Folder change behaviour in combined search: Same folder in all masks Different folders in all masks Always folder-independent in non-active mask
MANAGE	CLOSE APPLY

Edit workflow status: Improved dialogue

In the Edit workflow status dialogue window you can either make changes by clicking OK, which will close the window, or by clicking Apply, which will keep the dialogue window open, so that you can also set the next Workflow step directly, if desired.

🗟 Edit Workflow stat	tus - p	art (R): SN-0260	027	×
- Current status	Read (🔵 Write 💿 Dele	ete	
	ŀ		Notes:	
- Next status • V Released • O In progra			Approved; can be released.	
- Objects with requi	i red w Folder		change —	
Standard		•		
Number	Wc	Locked by	Name of link class	_
20N-000240	•		♦ Bauteil-Konstruktion	
2DN-000323	0		♦ Bauteil-Konstruktion	
Number of records:	2		OK Cancel	Apply

Attribute mappings for document input

The attribute mappings for file import, which you can configureat HELiOS Options > General > HELiOS Desktop,

also apply to document input via **Input > Document** and for template files, and can be selected accordingly in a pull-down menu of the Enter document dialogue.

Document number	Index	Ind	W	Design	ation	Docu	ument type	Creation dat	Created by	File changed on	Locked by
DN-000310			Ð			HiCA	D Drawing	15.11.2021	Administrator		
DN-0003 DEnter	docum	ent									×
PDN-0003											
PDN-0003 Docum	ent										
PDN-0003											
2000-MD											
PDN-0003											
2000-MD	Basic in	nforma	ation								
2000-ND											
PDN-0003	Docur	ment	num	nber:	DN-000344			Sheet:			
PDN-0003	Proje	ct nuu	mhe		PN-01-06-K		👔	Index:		·5·U 🔍	
RL_SN-0					PIN-01-00-K		U	IIIIICA.			
RL_SN-0	Folde	r nun	nber	:	Folder-independ	dent	📁				
PRL_SN-0											
RL_SN-0					-						
PRL_SN-0	Desig	natio	n:		Text file		•	Release:	In Progress	;	
RL_SN-0								Document typ	e: Others	-	
PDN-0003					Date:	Na	ime:				
2000-ND											
PDN-0003	Creat	ed:			2/13/2023	A	dministrator	Scale:			
2000-MD	Chec	ked:						Format:			
2000-0003											
2000-000											
2000-MD											
DN-000	Workt	low	ae	neral de	cument	-	Standard	•	ОК	Cancel	Apply
DN-000	Worki		<u> </u>						UK		дрру
DN-000343		•	0	Excel Do	ocument	Office	Standard		Administrator	13.02.2023 10:54:59	
Number of records: 9	8 Displa	ay: Cu	urren	t state			File configurati	on_02			

Import

The re-import of files via Input > Serial input > Import has been adapted to reflect possible error sources more transparently:

If files contained in the selected XML file are not found in HELiOS during the import, you will receive a corresponding error message before the remaining existing files are offered for re-import.



If the target document is no longer contained in the database, you will also receive a corresponding error message when attempting a re-import:

🗋 Import fil	e				_		×
😽 👼 Sta	indard	•					
Import	Document num	ber In	Designation				
✓	🖲 DN-011713		Production drawing				
✓							
Number of re	ecords: 2						
Documer	nt	Error					
0		The doo	ument no longer exists in the database.				
				(CANCEL	0	К

Central configuration for date fields and time zone

In addition to the possibility to assign an **Own date/time format** or the **Database time format** to result list areas, the possibility to further influence the default formatting of date values in HELiOS masks has been created.

For this purpose, you will find in the HELiOS Options under General > Units and formatting the new configuration options for Standard formatting of date with time, if applicable and Standard formatting of date without time:

Standard formatting of date with time, if applicable:	
dd.MM.yyyy hh:mm:ss	▼ (e.g. 17.03.2023 01:13:44)
Standard formatting of date without time:	
dd.MM.yyyy	🛛 🕶 (e.g. 17.03.2023)
dd.MM.yyyy	
[−] ^F dd\/MM\/yyyy	
MM.dd.yyyy	
Pro MM\/dd\/yyyy	
уууу-MM-dd	

The selection lists are preset with a number of frequently used formattings, which you can select accordingly. A preview of the selected formatting is displayed in the field to the right of the selection/input field.

You can also make your own entries for the date/time formatting in the field, as long as you use a correct syntax in line with the date and time setting in result lists.

Changing the formatting will then have an effect in two places:

- The display of date fields in masks
- The display of date/time fields in result lists where the **Date/time display** is set to **Standard**.

Creation da	te		
16.03.2023	Change title		
16.03.2023	Horizontal alignment	•	
16.03.2023	Date/time display	•	Date/time display
16.03.2023	Edit own date/time form	at	Database time format
16.03.2023	Representation type	•	Own date/time format
16.03.2023	Save		✓ Standard
	Reset		
	Configure		

The new setting **Standard** is also the new default for date/time fields in result lists, which applies to new installations of HELiOS.

The desired **Time zone** (in which date/time display takes place) can be selected here via a combined list if required.

Time zone: (UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna

The default time zone is the local time set in your operating system.

If the set time zone supports a distinction between winter and summer time, this is automatically taken into account. (I.e. in Germany UTC+1 (winter time) would automatically change to UTC+2 (summer time) on the corresponding date).

Performance

Especially in the area of the product structure tree and when generating HDE reports using many multilingual attributes, a significant performance increase of the HELiOS Database could be achieved with Service Pack 2.

Service Pack 1 2023 (V 2801)

Optimised search result lists

In order to increase performance, only objects for which the logged-in user has corresponding read rights are displayed in result lists of HELiOS objects (articles, documents, projects, folders, pipe classes and user-defined objects).

The sorting of result lists has been accelerated many times over due to a smaller number of internal queries, which also improves the creation of result lists in particular, in which case the database has a somewhat higher latency.

Earlier database options, with which the display of objects without access rights could be set, are thus no longer applicable.

Errors during printing or export

Errors that prevent documents from being printed or exported are displayed in the corresponding dialogue below the document result list when you click **OK**.

Double-clicking on an error line also marks the corresponding document in the result list above.

rint	0	0	Document	number	n	In W	Designation	Article		Project		Folder	
v			DN-0000)3	Т	•	Mounting drawing	SN-000002	🛛 🗔	20221124-2	🛯		
v		Þ	DN-0000)7			Mounting drawing	SN-000005	<u> </u>	20221124-2	S		
-		B	DN-0000	1		• €	Production drawing	SN-000007	8	20221124-2	S		
-		B	DN-0000	3		• €	Production drawing	SN-00008	8	20221124-2	S		
-		D)	DN-0000	5		• €	Production drawing	SN-000009	😣	20221124-2	📀		
V			DN-0115	73		● €	Production drawing			20221124-2	8		
umber o	∢ ∈ of rec	ords	: 6								-		
umber o Docur			: 6	Error							-		
Docur Docur	ment		: 6		e d	ocum	ent is not in the Vault.				-		
Docur	ment		: 6		e d	ocum	ent is not in the Vault.				-		
Docur	ment		: 6		e d	ocum	ent is not in the Vault.				-		

Example: If the dialogue returns the error description "File for document is not in the Vault", it is recommended to load the document once into the workspace.

Context menu entry for saving to HELiOS

After an installation of HELiOS, the Windows context menu has been extended by default by the menu item **Save to HELiOS**.



This makes it possible to save documents in the HELiOS database in connection with **HELiOSScan** in this simple way if the automatic transfer did not take place (e.g. by cancelling the document dialogue or due to an error).

Under certain circumstances this feature is not desired. Therefore, as of version 2801 of HELiOS, it is no longer automatically set up during a new installation. If the context menu entry is to be created in the process, you can activate the checkbox **Create context menu entry in Windows Explorer for saving files in HELiOS** in the **General** tab of the **Extended settings** installation step dialogue.

For update installations of older versions, the option is active and can be deactivated at the same point if desired.

Extended settings		_		×
HELIOS HELIOS Interf	aces General			
Installation directory	C:\Program Files\ISD Software und S	Systeme\HELi	DS\	
 Activate license ad ISD Update Service Create context met 		ng files in HEI	LiOS.	

New data type for List attributes

The new data type "LIST" is available for list attributes in the **Description** of attributes with the help of the Attribute Editor.

General Mandatory	Selection list C Suggestion C Predefined (• None	Copy for Change Derivation Follow-on shee
	LIST A TETIME FLOAT	Transfer data
	INTEGER	
New	Delete	Change
ОК	Cancel	End

Under Selection list you can differentiate between a Predefined list and a free list (Option: None).

The separate area in the attribute editor, in which list attributes were displayed separately in earlier versions, is no longer necessary.

Installation DVD: Changed path of the default database

When importing the HELiOS standard database with the **HELiOS Database Creator**, please note that its path on the installation DVD has changed.

As of HELiOS 2023 Service Pack 1, you will find the database there at ...\Databases\en.

D.L.			
Database: bau	ıteil		
Import/export path: F:\[)atabases\en		
		Export	Import

Copy attribute value and

Major Release 2023 (V 2800)

Units in the context menu

When right-clicking in result list columns of (float) attributes with unit category, the context menu shows you the corresponding unit, with designation and abbreviation.

Weight [Change title			
	Horizontal alignment	•		
	With thousands separa	tor		
	Decimal places			_
	Unit (Mass)	•	Unit (Mass)	-
	Unit symbol	•	Gram (g)	-
	Representation type	•	✓ Kilogram (kg)	+
	Save		Ton (t)	+
	Reset		Ounce (oz)	+
	Configure		Pound (lb)	ŀ

Copy and paste attribute values with unit category

The behavior of copying and pasting attributes with unit category using the **Paste attribute value** context menu functions has been further improved.

Please read the corresponding notes.



Export and import files

Both the export of HELiOS documents and the import of files to HELiOS have been revised.

In the export dialogue you have e.g. extended setting and attribute assignment options for the generation of file names.

Settings fo	or export
- Document	
Reserve exported documents also di	rectly
Export also referenced documents fr structure	om document or model
- File name	
 Attribute assignments 	CONFIGURE
🗹 Replace invalid characters with u	nderscore (\/:*?<> ").
Individual specification	
○ From document or model structure	
	CANCEL

In the extended export dialogue you can de-/reselect linked objects and their contexts if necessary.

The file import, in turn, has been adapted to the common use case of re-importing exported HELiOS documents. The simple selection of an XML file belonging to the export offers all documents in a clearly arranged import dialogue.

			đ	ð								
mport	Ö Ö	Document number	In	In V	V Designation	Document type	Creation dat	Created by	File changed on	Locked by	Locked on	
	b	🔊 DN-010023		•	BD8F6BE8	Others	08.08.2022	Administrator	08.08.2022 14:53:53			
	b b	📓 DN-010024		ŧ	022_977_027	Others	08.08.2022	Administrator	08.08.2022 14:53:53			
	b	🔊 DN-010025		ŧ	1682_21001_02	Others	08.08.2022	Administrator	08.08.2022 14:53:53			
	h Þ	📓 DN-010026		ť	1682_23001_02	Others	08.08.2022	Administrator	08.08.2022 14:53:53			
	b b	📓 DN-010027		ť	1682_40011_02	Others	08.08.2022	Administrator	08.08.2022 14:53:53			
 Image: Construction 	b	📓 DN-010028		ŧ	1682_B010-10_03	Others	08.08.2022	Administrator	08.08.2022 14:53:53			
 Image: Construction 		📓 DN-010029		ŧ	A1520 - 1104_Detail_v1	Others	08.08.2022	Administrator	08.08.2022 14:53:54			
	b	🗟 DN-010030		ŧ	AWARD2016_TEILANSICHT_E	Others	08.08.2022	Administrator	08.08.2022 14:53:54			
	b	🔊 DN-010031		ť	D1002635_mitDocuprinterGe	Others	08.08.2022	Administrator	08.08.2022 14:53:54			
	h Þ	📓 DN-010032		ť	FigFgaConvert	Others	08.08.2022	Administrator	08.08.2022 14:53:54			
	b	🔊 DN-010033		ŧ	isometrie_struktur	Others	08.08.2022	Administrator	08.08.2022 14:53:54			
		📓 DN-010034		ŧ	Kommentiert	Others	08.08.2022	Administrator	08.08.2022 14:53:54			
 Image: Construction 		DN-010035		•	pf_V_da_01 dach	Others	08.08.2022	Administrator	08.08.2022 14:53:54			
	ba bo	📓 DN-010036		ť	Plugins in the Actionbar Allp	Others	08.08.2022	Administrator	08.08.2022 14:53:54			
V 8	ba bo	DN-010037		ť	Zeichnung1	Others	08.08.2022	Administrator	08.08.2022 14:53:54			

The previously necessary editing of the system file hel_fileimport.ini is no longer necessary. However, configurations of older HELiOS versions stored there are still taken into account during the export.

Please also note the changes that result from this at **HELiOS Options > Import/Export**.

Print documents: File name configuration

As with the new options for attribute mappings when generating file names for exporting files, you can also configure the output file name by means of an attribute mapping when printing neutral formats in files (e.g. when outputting PDFs via the HELiOS Spooler).

Image: DN-000028 Image: Exploded view SN-000001 Image: PN-01-06-K Sheet 1 Image: DN-000028 Image: Create attribute assignment for file name Number of records: 1 Image: Converter: Image: Converter: Image: Converter: Image: Converter: Image: Converter: Image: Create attribute assignment for file name Image: Converter: Image: Create attribute assignment for file name Image: Converter: Image: Converter: Image: Converter: Image: Converter: Image: Converter: Image: Converter: Image: Create attribute assignment for file name Image: Converter:	Print D' O' Document number In In	W Designation	Article	Project	Folder	View	
Number of records: 1 Value Converter: Image: Converter in the image: C	🔽 💈 📂 🗋 DN-000028	Exploded view	SN-000001 🗙	PN-01-06-K		Sheet 1	
Number of records: 1 Image: Document number Image: Configure Image: Configure Image: Configure Image: Configure					•	×	
File name for neutral format: Configure	+	Value		Converter	r	-	
File name for neutral format: Configure Configure	Number of records: 1		ber			-	
5 Greated on							_
Manufacturer's drawing	File name for neutral format: Configure		1				Jance
		in Manufacturers	drawing				

The contents of the hel_fileprint .ini system file previously used for this purpose are copied to the attribute mappings when the file is first called. After that, the old ini file is no longer needed, but it is not automatically deleted from the system.

Index up-to-dateness

In result lists, the column **Index up-to-dateness** indicates by a symbol whether it is the most recent version index of a HELiOS object.

Most recent versions of objects are indicated by a green dot, old versions by an orange dot.

Articles X						
🔸 🐱 🍓 St	tandard	• 7	K €a			
Article number	Index	Index up-to-dateness	Designation	Part type	Creation date	Created by
SN-000001		•	Slip-on gear mechanism	Product	02.10.2006	Administrator
SN-000002	a	•	Clamping element	Assembly	02.10.2006	Administrator
SN-000003		•	Housing assembly	Assembly	02.10.2006	Administrator
SN-000004		•	Gear wheel assembly	Assembly	02.10.2006	Administrator
SN-000005		•	Pinion assembly	Assembly	02.10.2006	Administrator
SN-000006		•	Gearbox housing	Individual part	02.10.2006	Administrator
SN-000007		•	Gearbox cover	Individual part	02.10.2006	Administrator
SN-00008		•	Gear wheel	Individual part	03.10.2006	Administrator
SN-000009		•	Pinion	Individual part	03.10.2006	Administrator
SN-000010		•	Guide sleeve	Individual part	03.10.2006	Administrator
SN-000011		•	Spring guide sleeve	Individual part	03.10.2006	Administrator
SN-000012			Lock ring	Individual part	03.10.2006	Administrator

HELiOS Options: Default configuration for product structure output

From HELiOS 2023 and/or HiCAD 2023 onwards, a new version of the ISD Report Manager will be introduced.

The old version of the Report Manager will initially remain installed in the system in parallel.

You can control which Report Manager version is used for the product structure output in the **Database** Options. In the pull-down menu of the **Default configuration for product structure output** option, you can select which RMS or RM_SETTINGS file is to be used for the output of the product structure with the Report Manager.

In the default delivery database (i.e. for new installations of HELiOS 2023) the template PRODUCT_ISD.RM_ SETTINGS is set. This new template file calls the new ISD Report Manager during data transfer.

However, existing settings of existing databases will not be overwritten by an update installation. A parts list template (of file type .RMS) previously defined as default configuration is retained and still uses the old Report Manager.

In this situation, it is recommended to switch to the new Report Manager by using a template file of the type .RM_ SETTINGS.

ieneral settings	CAD System Local Session
Global generation rule for file names and numbers	No
Revise the new document.	No
Print only released documents	No
Optional Drag _Drop for follow-on sheet	No
Vault Server	No
Allow forced releases	Yes
Test statuses in role workflows can be ignored	No
Link E-mail	E-Mail Attachment
Apply workflow of last state for revision	Yes
lssue error message for undetected master data objects	No
Article attribute for defined weight	
Article attribute for surface area	FLAECHE
Article attribute for material (weight-relevant)	MATERIAL
Article attribute for body volume (weight-relevant)	
Article or material attribute for specific weight	RHO
Master link for product structure	
Default language	en
Default configuration for product structure output	PRODUCT_ISD.RMS
Attribute links in search masks	PRODUCT ISD.RMS
Multiple classification for articles	PRODUCT_ISD_HiCAD.RM_SETTIN(
Consider only active group when determining user rights	PRODUCT_ISD_HICAD.RMS
Show documents without access permission	PRODUCT_Stahibau_01.RMS produkt_din6771-a_part.rms
Show articles without access permission	Proflex.ms
Show projects without access permission	QometExport.ms
Show folders without access permission	Yes
Show pipe classes without access permission	Yes
Show user-defined objects without access permission	Yes
Update PDM items during product structure sync	No
Allow updating of released product structures	No

Please note:

For printing result lists, the new ISD Report Manager is already used.

Detailed information on the new ISD Report Manager can be found here.

Mark-up and Redlining

Note that when working with the extended markup and redlining functionality of HiCAD and HELiOS, the redlining tool **HiRedLine** is only installed by a combined HiCAD/HELiOS installation. In a standalone installation of HELiOS Desktop the tool is not available.

A failed call will return a corresponding system message.

0 Info
The HiRedLine program is only available for HiCAD/HELiOS installations. Therefore, the process cannot be carried out.
ОК

Bill of Materials / Report Manager

Service Pack 2 2023 (V 2802)

Edit template for export to Excel

If you want to use a specific template for the export to Excel, activate the option **Use template**. Then determine which template you want to use. To modify the selected template in Excel, select **Edit template**.

Excel export (settings)	×
✓ Visualize levels (Structure list)	
Query target file name (file dialogue)	
 Use template 	
O Select before saving	
 Use pre-defined 	_
C:\HiCAD\sys\HiCAD_Blech.EN.xlsx	II. 🖉 🖊
○ Execute script	
✓ Open file after export	
	OK Cancel

Extended Steel Engineering lists

The attribute **Coating** (\$15) has been included in the Steel Engineering lists of the Excel BOM (Hicad_ Stahlbau.xlsx). If you have parts coated in HiCAD, the coating is transferred to Excel when exporting the bills of materials.

Stru	uctu	re lis	t									
Drawing	No.	ZN-23242	3423	Customer	ISD Software	und Systeme Gmb	Н				5	
Order No).	AN-65126	6723	Created by	Maya Muster	mann						
Order tex	ĸt			Created on	09.02.2022						1C/	
Designat	tion	BN-65423	5456									
Level	Item	Total qty.	Designation	Length (mm	Width (mm)	Material	Туре	Naming	Coating	rface area	Weight (kg	Total weight
4		2	U 300	1550	100	S235JR	U-profiles		Paint RAL 5001	2,94	69,40	138,79
4		2	U 300	4145	100	S235JR	U-profiles		Paint RAL 5001	7,81	185,05	370,11
4		2	U 300	249	100	S235JR	U-profiles		Paint RAL 5001	0,35	7,74	1 15,48
4		2	L EN 10056-1-50x50x5	1485		S235JR	L-profiles		Paint RAL 5001	0,60	5,60	11,20
3		1	P30-30-1000x305	1000	305	S235JR	Gratings				13,00	13,00
3		1	P30-30-1000x305	1000	305	S235JR	Gratings				13,00	13,00

Dimension attributes Length and Width

In the Excel BOM for Steel Engineering (Hicad_ Stahlbau.xlsx), as of HiCAD 2023 SP2, the column for the Length attribute is before the column for the Width attribute.

Extended bar list

When outputting the bar list in Excel, the used length is now output in addition to the waste. For this purpose, the BOM template for Steel Engineering has been extended by the placeholders

- !BarWaste! Waste
- !BarUsed! Length used

Bar	list												
Drawing Drder No		ZN-23242342 AN-65126672				Custor Create			Software und a Mustermanr	Systeme GmbH			HIGAD
order te lesigna		BN-65423545	6			Create	d on		2.2022				HIGAU
-1 20x	5, S235J	R				12 x 60	000 mm	Wa	ste: 9003 mm	(12.5 %)		Length used: 629	97 mm
Item	Number	Length	(mm)	Cut (V	Veb)		Cut (Flange)			Naming			Coating
1x	0 ((856)		0 (856)	((856)		0 (856		0 (856)	1	0 (856)	819
	4		856										
	4		856										
	4		856										
	4		856										
	4		856										
	4		856										
	0 (856)		0 (856)	((856)		0 (856)		0 (850)		0 (850)	//////830 ///////
	1		856										
	1		856										
	1		856										
	1		856										
	1		850			32.9°							
	1		850			32.9°							
×	0 (849)		0 (849)	0	(849)		0 (849)		0 (849)		0 (849)	0 (849)
	6		849			32.9°							
	6		849			32.9°							
	6		849			32.9°							
	6		849			32.9°							
	6		849			32.9°							
	6		849			32.9°							
_	6		849		///////////////////////////////////////	32.9°				//// 1070/////			
L		849)		0 (847)	///////////////////////////////////////	/////		///////////////////////////////////////	///////////////////////////////////////	/////4276`/////	//////	///////////////////////////////////////	<u> </u>
	1		849			32.9°							
	1		847										

Templates for DSTV and ERPlus

The new ISD Report Manager 2023 is now used for the BOM exports to Qomet and Proflex.

Major Release 2023 (V 2800)

New ISD Report Manager

As of Version 2023, there is a completely new, comfortable ISD Report Manager. This ISD Report Manager works with RM_SETTINGS instead of RMS files. To convert your old RMS files, the function **Convert RMS file to RM_SETTINGS** is available at **Tools**.

Further advantages:

- By importing / exporting the settings in the dialogues, you can save multiple combinations of settings and conveniently reuse them.
- The headers and footers are now configured using a graphical interface.
- A Sort sequence can be defined for all available columns.
- You can now dynamically search for attributes in the Column settings.

ISD-ReportManager													
HiCAD_Stahlbau			- 4	H .	-	• 🎼 •	× 🔛 -	🗷 - Т - 🄇		94 7 80		•	¢ 0
TH T1 T2 T3 TH		9	uantity list	Struct	ure Li	st 5							
4 📕 060 MITRE		~	Item	Qty.		gnation	W [mm]	L [mm]	Cut (Web)	Cut (Flange)	Material	Su [m ²]	
Stairway (Assembly)	[2]		0	1		U 300	100.				S235JR		1.5
🎵 U 300 (U-beam mit v	vith inclined flange surfac		0	1		FI 20x5		855.			S235JR		0.0
4 🍖 Railing (Assembly) (1			0	1		Pipe 48.3x		1576.		I\ 16.4*	S235JRH		0.2
4 h Segment (Assemi	bly} {}		0	1		Pipe 48.3x		955.		IX ?	S235JRH		0.1
🔺 🍖 Handrail (Asse			0	1	-	BI 14	80.				S235JR		0.0
	2.6 (Steel pipe) {0}		0	1	-			955.		IX ?	S235JRH		0.1
Post (Assemble)			0	1		BI 14	80.				S235JR		0.0
3 D 🏫 Post (Assembl			0	1		11 20/12		855.			S235JR		0.0
P St Assemble			0	1	-	FI 30x6		1004.			\$235JR		0.1
🖻 🍖 Post (Assembl			0	1	-	FI 20x5 FI 20x5		855.			S235JR S235JR		0.0
🖻 🍖 Infill (Assembl			0	1	-	FI 20x5		855.			S235JR S235JR		0.0
🖻 🍖 Infill (Assembl			0	1		FI 20x5		855.			S235JR		0.0
🖻 🍖 Infill (Assembl			0	1				855.			S235JR		0.0
🕑 🐂 Infill (Assembl			0	1		FI 20x5		855.			S235JR		0.0
Yessemi Segment {Assemi	bly} {}	~	0	1	-			855.			S235JR		0.0
	>		0	1		FI 20x5		855.			S235JR		0.0
Pipe 48.3x2.6 (Steel pipe) {		-1-	0	1		FI 30x6		240.			S235JR		0.0
		_	0	1		FI 30x6		240.	9 I/ 45°		S235JR		0.0
Designation	value	<u> </u>	0	1		FI 30x6		240.	9 I/ 45°		S235JR		0.0
🔄 \$PSC	ROHR		0	1		FI 30x6		240.	9 \ 45°		S235JR		0.0
2-D/3-D	3		0	1		FI 20x5		855.	7		\$235JR		0.0
🔄 Acceptance index 🥢 🭊	4		0	1		FI 20x5		855.	7		S235JR		0.0
Advance Order No.			0	1		FI 20x5		855.	7		S235JR		0.0
Angle 1 of section schema	16 4404 *		0	1		Pipe 48.3x		1108.	3 45° /X ?	IX ?	S235JRH		0.2
			0	1		Pipe 48.3x		955.	0 IX?	IX ?	S235JRH		0.1
Angle 2 of section schema			0	1		BI 14	80.				S235JR		0.0
Angle bottom/left - XZ	0.0000 *		0	1		Pipe 48.3x		955.		IX ?	S235JRH		0.1
🕺 Angle bottom/left - YZ	0.0000 °		0	1	-		80.				S235JR		0.0
Angle bottom/right - XZ	0.0000 *		0	1				511.			S235JR		0.0
Angle bottom/right - YZ	-16.4494 °		0	1	-	FI 20x5		855.			S235JR		0.0
Aperture angle			0	1				855.			S235JR		0.0
			0	1		FI 20x5		855.			S235JR		0.0
Article number	Pipe 48.3x2.6	~ <	0	1		FI 20v5		855	7	II	\$235 IR		0.0

User interface

- 1. Menu bar
- 2. The toolbar has been retained and extended to include the settings.
- 3. Overview of all BOM-relevant parts in the utilized assembly.
- 4. Overview of all attributes of the part clicked on above.
- 5. The unit is automatically displayed in the Quantity list and Structure list and is configurable.
- 6. Status bar.

Export

A graphical interface is now available for configuring header and footer templates.

🙀 Header and Footer Editor (printer output)	– o ×
🎦 🛥 ≌ 🐘 🟋 🎼 専 🖩 亚 🕲 合 🕴 🤊 🦿 🧯 Grid : 🇮 开 DX:	12.00
Page parameters: 2	I Order number (H_SZNATTRS01) I Designation 1 (H_SZNATTRS06) I Customer (H_SZNATTRS03) I Sheet No. (H_SZNATTRS05)
Page margins Left: 6.35 Top: 6.35 Right: 6.35 Bottom: 6.35 Basic elements: 3	野 Supplier (pl) 闷 Pixel graphic
Document info data: 4 Auxiliary text 1 Auxiliary text 2	TextBlock 7 8 P m ^
Auxiliary text 3 Auxiliary text 4 Auxiliary text 5 Back from authoriz. Created by Created on Customer	Attribute name: H_SZNATTRS05 System font: Arial Regular ~ Text alignment: Left ~ Top ~ Font: Normal ~ Font weight: Normal ~ Text colour: Black ~
Designation 1 File name: D:\uebersetzungsprojekte_2022\dokumentation\aenderungen_2800\repman\Kopfzeile.hf	Text height: 4.23

- 1. Function bar
- 2. Page parameters
- 3. Basic elements
- 4. Document info data, list of usable attributes
- 5. Workspace
- 6. Built-in elements
- 7. Parameters for the element Text format
- 8. Parameters for the element Pixel graphics
- 9. Status bar

The Excel export has also been revised::

- There is now a separate function for the Excel export with template or script. An Excel template or a C# script can be used here.
- There is now the function **Create Excel document (xlsx, xls)**, which transfers the displayed lists directly to Excel without formatting. The data can be formatted with a Visual Basic Script (.vbs).
- In addition, there is a function that writes the displayed cells to an Excel XML file. The data can be formatted with a Visual Basic Script (.vbs).

Column properties

Through the new Column settings dialogue, you can now dynamically search for attributes.

					Find	(~	Note case-sensi
uantity list Structure List		2								4		5			6
3 Designation	Alias name	8	at	2 1		*	Alignme	nt	Sorting method	33	-	Σ	Attribute name	Category	Displayed unit
리 Part ID	1	•]	Right	Ŷ					%Btkenn		
Part name]	Left	v	Standard	,			%Krpname		
Part type							Right	v					H_%10		
Part type							Left	v	Standard	·			H_\$05		
Pipeline 1							Left	v	Standard	·	-		%PipeLineName		
Plant code							Left	v	Standard				%AnlBauSykennz		
Plant part type							Left	v	Standard	,			%AnlBauTxt		
Production line]	Right	v					H_DSTV_12		
Qty. in assembly							Right	~					H_%13		
Qty. per part		~					Right	~					H_%01		
Quantity 1							Right	v		3			H_§11	None	
Quantity 2							Right	v		3			H_§12	None	
बे Quantity 3]	Right	v		3			H_§13	None	
Ref. ID]	Right	Ŷ					%Refkenn		
최 Rev ID]	Right	v					\$RevID		
Sheet thickness]	Right	v		3			H_§T2D	Length	Millimetre ~
Shipped length]	Right	v		3	~		H_§25	Length	Millimetre 7
Special weight [kg/m,St]] 🗆	Right	~		3			H_DSTV_26	Weight per len	Kilograms pe 👻
Standard Parts catalogue key] 🗆	Left	v	Standard	·			H_\$PTK		
Store							Left	Ŷ	Standard				H_DSTV_17		
Surface area							Right	v		3			H_§10	Surface	Square metre ~

- 1. Dynamic search
- 2. Column type
- 3. Visibility of columns and export of columns
- 4. Decimal places.
- 5. Identical part search and column sum
- 6. Category and Displayed unit are for attributes of type Integer or Double
- 7. The Displayed unit depends on the category. For length, units such as metres, inches, feet, etc. are available. The unit is then displayed in the column in square brackets.
- 8. Attribute name, Category and Displayed unit are visible when the **Extended display** is active.
- 9. Displays only the columns marked as visible with the Visualisation checkbox activated.

Head data setting

The ISD Report Manager now offers the function **Head data settings**. This allows you to set attributes centrally and comfortably for all possible exports.

Sort sequence

The sort order can now be set for all available columns. In the old Report Manager, only four columns could be set. In addition, for the column type String, one of four sorting methods can be selected for the respective column.

- Standard: Sort alphabetically
- Numerical: Sort by numbers
- Logical: As in Windows File Explorer
- Date/Time: By date and/or time

Filter settings

The data displayed in the list window of the Quantity list and Structure list can be filtered, i.e. only the rows of the list that meet certain criteria - specified in the filter definition - are displayed.

For example, you can

- output only parts with a certain item number or parts whose item number lies within a certain range,
- transfer filters via import/export and save them,

apply the respective JavaScript methods to the data types,

- create regular expressions and
- get direct feedback on errors in the expression.

Filter criteria are defined column by column. Only the rows in the list that meet all the filter criteria specified for the

columns are then output. Columns for which a filter has been defined are marked with

User-definable columns

With the function **User-definable columns** you have the possibility to add additional - freely definable - columns to the BOM or to change already defined columns.

Us finable col	umns								×
u 🖪 💩 🔰	< 🖻 🖞 (2							
Quantity list Structur	e List								
Designation	Attribute name	Alias name	۲		Alignment	38	Category	Unit 4	Displayed unit
🛃 Total weight	Ges_Gew	Ges.Gew	•	[%/	Right ~	2	Weight ~	Kilogram ~	Kilogram ~
) (-	
BC_ BT_ B	3_SK_ 2-D/3-	D BOM-releva	int	<u>1</u>	SO item numb	er 1 🔯	ISO item number 2	Item number (Item)	Level
🖄 Model ID 🔯 Mo	dule 🔯 Number	Number of pro	ofiles	s in t	his bundle	Part ID	🕺 Part ID 🕺 Part typ	e 🔯 Qty. in assembly	Qty. per part
🔯 Ref. ID 🛃 Rev ID	Angle 1 of se	ection schema	Angl	le 2 d	of section sche	ma 國 A	ngle bottom/left - XZ	🕺 Angle bottom/left - ١	Z
Angle bottom/righ	ıt - XZ 國 Angle b	oottom/right - YZ	<u>ه</u> ۵)evel	lopment lengt	h 📑 Dev	velopment width 💽 He	eight 國 Installation su	rface 5
Installation surface	of a profile (cut)	💐 Installation surf	ace o	of a p	profile (uncut)	📑 Instal	llation width 國 Length	n 📑 Material length	•
Nominal diameter	Nominal diam	neter 2 國 Nomina	al dia	amet	ter 3 💽 Oute	er diamete	r) 國 Sheet thickness) 🛙	🛃 Surface area 🛃 To	tal length
Total weight (Ges	.Gew) 💽 Trimme	ed length 💽 Wall	thick	kness	s 💽 Weight	國 Widt	h 🔄 _ID_ 🛋 Article r	number 💽 Coating	Coating, inside
Coating, outside	💐 Comment 🌉	Construction section	on [el D	Designation 1	(Designat	ion) 💽 Designation 2	Drawing number	U
			_	_					
Display: 🗹 🛤 🔽	🗟 🗹 🛋 3								OK Cancel

- 1. Create new columns by type
- 2. Copy and paste a column. If none is active, all are copied.
- 3. Filter which column types are to be displayed in the pool
- 4. Category and Displayed unit can be defined directly
- 5. Overview of all available columns, filterable by type

When editing a formula, the column name clicked on is entered there as an attribute.

Excel-BOM with pipe length list

For the new ISD Report Manager (from HiCAD 2023), an XML configuration file adapted for Plant Engineering is available with the name **HiCAD_Anlagenbau.rm_settings**. This configuration file allows the sensible creation of bills of materials (BOMs) of mixed model drawings and also contains a pipe lengths list.

The file is located in the HiCAD sys directory and facilitates in particular the use of a new BOM template for Excel export. This new template HiCAD_Anlagenbau.2800.0.xlsx can also be found in the sys directory of your installation (or as **HiCAD_Anlagenbau.EN.2800.0.xlsx** in the sub-folder **bomtemplates**).

Adapted configuration files for the new ISD Report Manager are also available for the Plant Engineering functions at **Plant Engineering > Evaluation**.

HELiOS Options: Switching between previous and new ISD Report Manager

HELiOS 2023 or HiCAD 2023 introduces a new version of the Report Manager.

When creating the BOM in HiCAD and HELiOS, you decide by selecting the configuration whether the previous Report Manager or the new ISD Report Manager opens.

- The old Report Manager uses files with the file extension **RMS** for the configuration.
- The new ISD Report Manager from version 2023 onwards uses XML configuration files with the file name extension **RM_SETTINGS**

General 🌌 HiCAD	
General settings	CAD System
Global generation rule for file names and numbers	No
Revise the new document.	No
Print only released documents	No
Optional Drag _Drop for follow-on sheet	No
Vault Server	No
Allow forced releases	Yes
Test statuses in role workflows can be ignored	No
Link E-mail	E-Mail Attachment
Apply workflow of last state for revision	Yes
Issue error message for undetected master data objects	No
Article attribute for defined weight	
Article attribute for surface area	FLAECHE
Article attribute for material (weight-relevant)	MATERIAL
Article attribute for body volume (weight-relevant)	
Article or material attribute for specific weight	RHO
Master link for product structure	
Default language	en
Default configuration for product structure output	PRODUCT_ISD_HiCAD.RM_SETTIN -
Attribute links in search masks	No
Multiple classification for articles	No
Consider only active group when determining user rights	No
Show documents without access permission	Yes
Show articles without access permission	Yes
Show projects without access permission	Yes
Show folders without access permission	Yes
Show pipe classes without access permission	Yes
Show user-defined objects without access permission	Yes
Update PDM items during product structure sync	No
Allow updating of released product structures	No

You determine the configuration in the HELiOS Options at **Database** and then **Default configuration for product** structure output.

New BOM templates for HELiOS

There are new configuration files for creating bills of materials from the HELiOS product structure. The files (*.RM_ SETTINGS) are located in the SYS directory of HiCAD.

- PRODUCT_ISD.RM_SETTINGS
- PRODUCT_ISD_HiCAD.RM_SETTINGS

HELiOS Spooler

Service Pack 2 2023 (V 2802)

Performance

With Service Pack 2 a further performance increase of the HELiOS Spooler could be achieved.

The optimization becomes especially obvious when performing and displaying a very high number of active print/-convert jobs.

Result list attribute to mark documents being updated by Spooler

In the user interface configuration of HELiOS document result list you will find the new attribute **Update status** (VA_ DocumentPendingUpdateJob).

- Ava	ailabl	e att	ribute	s		
Filter	-				×	•
						_
	ocui	ment				
	, K		Туре	Designation	Attribute name	
			۲	Source or target link	VA_ObjectLinks	^
				Source or target link	VA_ObjectLinksWithTexts	
				Standard created by	NORM_NAM	
				Standard created on	NORM_DAT	
				Standard designation	DOCUMENTSTANDARDDESIGNATION	
				Subject	SUBJECT	
				Substitution document	HEL_SUBSTITUTION_DOCUMENT	
			۲	Target date	VA_ObjectWorkflowTargetDate	
				Type identifier	HEL_ART	
\checkmark	✓		۲	Update status	VA_DocumentPendingUpdateJob	
				Version number of related application	HEL_APPLICATION_VERSION	
				Weight	GEWICHT	
			۲	Workflow name	VA_ObjectWorkflowName	
✓	✓	✓	1	Workflow status	VA_DocumentReleaseStatus	
✓	✓	✓		Workflow status	DOCUMENT_RELEASE	
			1	Workflow status	VA_ObjectReleaseStatus	
			۲	Workflow status	VA_ObjectWorkflowStatus	-

Attribute description:

Indicates documents that are currently being updated by the HELiOS Spooler and are therefore not up to date. Will be maintained automatically.

If the column has been added to result lists, it marks there, if applicable, documents that are currently being updated by the Spooler and therefore cannot be currently displayed with a $^{f C}$ symbol.

Do	cuments >	<				
47	💌 🚡	Standard 🔹 🍸	¥ 🖳			
0	Open, with	Document number with icon	Update status	Index up-to-date	Workflow status	Document type
-	5	PDFDN-000218	C		•	Others
-	6	POF DN-000217	C		Ð	Others
-	Eş 🛛	PDN-000216		•	Ð	HiCAD Drawing
-	6	DN-000213			Ð	Others
-		DN-000210		•	•	Office Document
-	5	DN-000209			Ð	Office Document
-	6	>DN-000036		•	Ð	HiCAD Drawing
-	E-p	2000-000035		•	Ð	HiCAD Part/Varian
-	6	>DN-000034			Ð	HiCAD Part/Variant

PDF printing via Windows

As of Service Pack 2, the Spooler supports the possibility to use the Windows functionality **Microsoft Print to PDF** for printing to PDF.

This output may be faster and an installation and setup of the ISD FilePrinter PS may not be necessary.

Service Pack 1 2023 (V 2801)

Performance

By loading the document structure directly on the Spooler Server instead of from the Client side, a significant increase in performance could be achieved during printing/conversion.
Support of RM3/ RMA files discontinued

Note that printing/converting RM3/ RMA files is no longer supported by the HELiOS Spooler as of Version 2800.

Server Monitor

With the help of the **Server Monitor** tool, you can monitor the runnability of HELiOS server applications such as the **Vault Server** or the **HELiOS Spooler** and make any necessary adjustments in the event of problems.

淤 Settings				
General	Ref HEI	LiOS Spooler Settings		
Netlios Vault Server	- General -			_
🎭 HELiOS Article Synchronization	Port:	35725		
	Interval:	60 s		
	– Time-out	i		_
	Response ti	me:	30 s	
	Response ti	me of error detection:	60 s	
				K]

HELiOS Task Starter

The new **HELiOS Task Starter** tool can be used for automatically re-starting the HELiOS Spooler after it has been closed, or after a possible crash.

HELiOS Vault Server

Service Pack 2 2023 (V 2802)

Server Monitor: Communication port for article synchronisation during installation

The **Port** via which the Server Monitor communicates with **HELiOS Article Synchronisation** with ECAD/CAE applications such as EPLAN or Zuken E3 can be defined not only in the settings of the Server Monitor tool, but also during the installation process of the part synchronisation.

The default port number is still 35727.

HELIOS Article Synchronization Setup Configuration HELIOS Article Synchronization Settings	1.2.1
HELIOS Interfaces EPLAN Zuken E3	HELIOS Server Monitor Communication port 35727
Service registration User DEDTM066\XXxxx Password Start service upon installation	x
(Back Next Cancel

Service Pack 1 2023 (V 2801)

Server Monitor: HELiOS Article Synchronization

The **Server Monitor** has been extended to include the option of monitoring the HELiOS Article Synchronization service for HELiOS interfaces to ECAD/CAE applications such as EPLAN or Zuken E3.

	X	Settings		
General	🐲 Setti	ings for HELiOS article s	ynchronisation	
HELIOS Vault Server	– General –			
🐾 HELiOS Article Synchronization	Port:	35727		
	Interval:	60 s		
	– Time-out			
	Response tin	ne:	30 s	
	Response tin	ne of error detection:	60 s	
			CANCEL	ОК

💠 Add server monitoring				
Choose a server application: HELiOS Article Synchronization 🔹				
- Connection				
Server:	dedtm184			
Port:	35727			
- Configuratio	HELiOS Article Synchronization	Ż		
Version:	28.1.0.244	2		
Interval:	60	s		
Log:				
	CANCEL	OK		

Server Monitor

With the help of the **Server Monitor** tool, you can monitor the runnability of HELiOS server applications such as the **Vault Server** or the **HELiOS Spooler** and make any necessary adjustments in the event of problems.

			指 HELiOS Server Monitor		?	[□ ×
2 🔶	× / 0 0						×
Status	Server application	Ever	nt description				Lc
		- Connection Server: Port:	9000	-			
		- Configuratio					
		Name:	HELiOS Vault Server	© ‡ \$			
		Version:		-			
		Interval:	60	<u>s</u>			
		Log:					
			CANCEL	ОК			

HELiOS MS Office Interface

Service Pack 2 (V. 2802)

Combined search



Calling the functions **Open + Edit** or **Open, read-only** from the menu of a HELiOS-Office interface and **Attach document** in an active Outlook mail opens the **Combined search** mask search of HELiOS as of Service Pack 2.

XI 🔒	う · ♂ · ☆ ☆ ☆ Book1 - Excel	~	(
FILE	HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW ACROBAT Autodesk Vault HELIOS		
		×	
Paste 🔹	B I U - 🗄 - 💁 - 🗛 - 🚍 = e e e E 🗄 Merge & Center - 😨 - % , 🐝 🐝 Conditional Format as Cell Insee	rt Delete F	orm
Clipboard		Cells	
A3	©Q Combined search − □	×	
A	- Search conditions		
1	Article Document Links		-
3	AllgTyp-Geometrie Battelide Konsteli	tion Î	
4 5	Bauteil(e)-Konstruk Bauteil-Konstruktio		-
6	Bauteil-Teilegeome		
7	Basic information Customer drw. cher		_
9	Document number:Sheet:Sheet:Sheet:Sheet: Customer drw. rele		+
10 11	Project number: Project-independent 🔋 🌯 Index: Customerdrawingp		_
11 12	Folder number: Folder-independent Deleted Decumentation		+
13	Drawing checkup		_
14 15	Designation: Release: Drawing not up to a Drawing part	date	+
16	Document type: Drawing released		
17 18	Date: Name: Drawing up to date Created: Scale: DSTV-NC data not of		_
19	DSTV-NC data up to	o dat	
20 21	DWG drawing not u		_
22	DXF data not up to	date	-
23 24	DXF data up to date DXF data up to date DXF drawing not up		_
25	DXF drawing up to		-
26	Index text: Based on: Model not up to da	te	
27 28	Model up to date		-
29	Mounting drawing Mounting draw, che		
30 31		•	_
32			
33 34	- Search result		
35	Standard -		
36 37			-
38			
39 40			-
41	Search has not been executed yet		-
42			_
43 44			
45			
46 47			+
48	Number of records: 0		
49 50		Cancel	+
READY		Ħ	B

Outlook: Attach preselected document

In addition to inserting E-mail attachments via the HELiOS function **Find document**, you can also attach a document that you have previously marked for this purpose via the context menu function **Preselect document**, e.g. in a

result list of the HELiOS Desktop, by simply clicking on **Attach preselected document** in the context of an active E-mail.



HELiOS CAD/CAE Integrations

Service Pack 2 2023 (V 2802)

Extension of Batch update function

The functionality of the **Batch update**, which is available to you in the HELiOS-Autodesk Inventor interface, has been extended.

	В	atch update	
*			
Document	Article	Link	
DN-000527	SN-026028	HeliosAiDoc	
DN-000528	SN-026029	HeliosAiDoc	
DN-000515	SN-026030	HeliosAiDoc	
DN-000529	SN-026031	HeliosAiDoc	
DN-000561	SN-026064	HeliosAiDoc	
DN-000562	SN-026065	HeliosAiDoc	
DNI 000567	SNI 026070	HeliosAiDec	
– Settings – Also update s	sub-structures		
Automatic ch	eck-in		
Clear work	space automatically		
_	read-only objects		
		CANCEL	OK

If the option **Clear workspace automatically** is activated, you may be asked whether you also want to remove documents from the workspace that have local changes, which may be documents indirectly affected by the update, even if they were not selected for batch update.

If you answer **Yes** to the query, all documents without an edit pen are symbol removed from the workspace. If you select **No**, all documents without an editing pen and without local changes are removed from the workspace.

Please note that discarding local changes to files may cause problems later on.

Generally, it is also possible to update HELiOS objects (parts and assemblies) that are actually read-only automatically via a new option.

The updating of read-only objects is reserved for users who have the corresponding authorisation, which can be set individually in the user administration (see below).

Please also note the new feature that the batch update can generally only be carried out by users who have the corresponding authorisation. If this is not the case, you will receive an error message when you call it up:

0 Info
The function can only be executed by users who have the right to execute batch updates.
ОК

In the **User Management** window of the administration tool **EDBSETUP** you can add the following functions for user names under **User functions > Edit**:

- Allow batch update (the corresponding user can call the batch update)
- Allow batch update of read-only objects (the user receives the authorisation to also change read-only parts via the batch update)

편 HELiOS Configuration HELiOS Configuration User <u>W</u> orkflow <u>R</u> oles <u>E</u> xtras ?
$\blacksquare \otimes \blacksquare \checkmark \checkmark \checkmark \blacksquare $
User Management Username Chief Designer Add Delete Edit Copy Properties Surname: Chief Designer This
First name: Departmen System user name:
Groups Status Default Edit Engineering Unit man Norm Unit man Process Planning Observer Semi-finished Prod. Unit man
change customers Group change design release Group change doc. dass Group change documents Group change documents Group
User functions Access rights granted for following functions: Function Function Project Change Function Project Create Standorte Change Project Delete -> Project View -> Allow batch update -> Allow batch update of read-only objects <-
OK Cancel

Attribute assignments for user-defined object types

As part of the multi-CAD integrations and for the EPLAN parts synchronization service, attribute assignment has been extended to include support for reference objects (e.g. material or customer).

This means that user-defined reference attributes can be automatically assigned to a HELiOS object (part, project, etc.).

Among other things, this also enables the joint use of such reference objects with different CAD systems.

In the window Attribute assignments for import to HELiOS, you will find a new assignment between source attribute Material and target attribute Material by default.

lype:		1 🚹 🗣 🖉 💼	File: Standard	- 🗣 🗡 🛙
ilter:	× •			
	Source	Destination	Constraint	Converter
	File extension, with 2 case differentiations	Part type (COMPONENT_TYPE, Article)	IsInventorPartOrAssemblyAndNoSen	
	Material	Material (WERKSTOFF, Article)	IsInventorPartOrAssembly	DefaultStringConverter
	Weight	Weight (GEWICHT, Article)	IsInventorPartOrAssembly	DivideBy1000FloatConverter
	Volume	<> Volume (VOLUMEN, Article)	IsInventorPartOrAssembly	DivideBy1000000FloatConverter
	Designation	Designation (BENENNUNG, Article)	IsInventorPartOrAssembly	DefaultStringConverter
	Fixed value: Stck (de), Piece (en), Pièce (fr), Pezzo (it), Sz	 Unit of quantity (COMPONENT_QUANTITY_UNIT, Art 	IsInventorPartOrAssembly	
	Fixed value: Halbzeug+Anlagenbau (de), Raw-part+Plar < Part type (COMPONENT_TYPE, Article)		IsSemiFinishedPart	
	Part number	Standard designation (NORMBEZEICHNUNG, Article)	IsStandardPart	DefaultStringConverter
	Size designation	Dimensions (ABMESSUNGEN, Article)	IsStandardPart	DefaultStringConverter
	Standard	Standard designation (NORM, Article)	IsStandardOrSemiFinishedPart	DefaultStringConverter
	File extension, with 6 case differentiations	Document type (DOCUMENT_TYPE, Document)		
	File extension, with 5 case differentiations	Designation (BENENNUNG, Document)		

You can define further assignments of user-defined object types according to your own requirements. Source attributes are compared with the target attribute of a user-defined object type to determine the relevant object.

The assignments are taken into account both when creating a new object and when updating an object.

Workspace

In the **Workspace** dialogue window, which is available in HELiOS Desktop and in linked applications, it was not possible in the past to remove documents in an application other than the one in which they were created. This means, for example, that you could not remove multi-CAD or Office files in the HELiOS Desktop workspace.

This was made possible with the update to Service Pack 2. However, as it is still advisable to remove certain documents only in the workspace of the "associated" application, you will receive a warning message with a query in this case.

Warning		
Documents that were loaded via a HELiOS interface should only be removed interface in order to avoid problems. Should the affected documents be rem		
	NO	YES

Query for direct saving when linking articles

In order to link documents from CAD drawings with HELiOS articles, the corresponding structures must have been saved in your CAD application and in HELiOS beforehand.

In earlier versions, you received a message to save manually before the article link could be made.

In order to save work steps, the message has been extended to a query via which you can trigger the saving directly by clicking on YES and continue with the creation of the article link without interruption.

🔩 Model structure		
The structure has no been saved. Do you want to save to Autocad Inventor and HELiOS first?		
NO	YES	

Service Pack 1 2023 (V 2801)

HeliosCouplings

The **HeliosCouplings** tool makes it possible to deactivate/activate interfaces to applications such as AutoCAD, Inventor, Navisworks, EPLAN, E3 or MS Office applications outside the HELiOS (update) installation routine.

Service Pack 1 of HELiOS 2023 introduces the innovation that information about the versions of individual applications is also displayed. This also includes older software that is no longer supported.

If a different HELiOS version installed in the system is interfaced with an application than the one currently being executed, information about this will also be displayed.

PHELiOS Interfaces			×
CAD AutoCAD® Inventor® Navisworks® Microsoft Office® Excel 2013 Outlook 2013 PowerPoint 2013 Word 2013	Active in D:\usr3\helioshicad\2702.X_2022\dev\Install\exe64_Release (27.2.2.503)		^
	Not installed Not installed		>
	OK Cancel		

Open, with options

The **Open, with options** function offers you file type-specific options that are taken into account when opening a document.

For example, you can also select the express mode for Inventor assemblies called from HELiOS.

With the update to HELiOS 2023, you will also find the function for direct call in the HELiOS Ribbon of Autodesk Inventor.



The call first opens the HELiOS Combined search to select a corresponding document). If this was confirmed by OK, the **Open, with options** dialogue window appears.

If the checkbox **Load, with version selection** was previously activated in the combined search and if different indices are available for a selected document, you will also be asked to select the desired index in between.

🔊 🔜 Standard	•				
pen, read-only	Open + Edit	Index	Index creator	Index date	Index text
		b	Administrator	01.04.2020	
	>	a	Administrator	01.04.2020	
1			Administrator	07.02.2020	Origin

Batch update

There are some new features for the **Batch update**, with the help of which you can update a multiple selection of HELiOS documents "in one go" via the Combined search:

You can have the check-in of the corresponding documents and also a subsequent emptying of the HELiOS Workspace carried out automatically via an option in the dialogue window.

Document	Article	Link						
DN-000515	SN-026030	HeliosAiDoc						
DN-000529	SN-026031	HeliosAiDoc						
DN-000561	SN-026064	HeliosAiDoc						
DN-000562	SN-026065	HeliosAiDoc						
DN-000499	SN-026013	HeliosAiDoc						
DN-000507	SN-026007	HeliosAiDoc						
- Settings Also update sub-structures Automatic check-in								

Also, the status display has been redesigned and now offers a Cancel option:

	Batch update	-	\times	
Q	Updating			
	Updating document 18 of 70: DN-000511			
þ	Update workspace			
	CANCEL			

You can also control the automated behaviour when updating components to newer indices via the **HELiOS Options** for your multi-CAD application. This means that there is no longer a prompt during the update process.

Discontinuation of older multi-CAD interfaces

Note that with the release of HELiOS 2023 (Version 2800), the following older multi-CAD interfaces will be discontinued:

- AutoCAD (Mechanical) 2019
- Inventor 2019
- Navisworks 2019

HELIOS in HiCAD

Service Pack 2 2023 (V 2802)

Automatic removal of documents from the HELiOS workspace

When HiCAD is closed, all documents not being processed are removed from the HELiOS workspace.

This also applies to neutral formats (e.g. PDF files) that were loaded into HiCAD via a HELiOS context menu.

Files with local changes (which have not yet been transferred to the HELiOS database) are not automatically removed.

Message if HiCAD Integration module is missing

If, when starting HiCAD, a HiCAD basic module other than "HiCAD VI/AV" and a HELiOS basic module other than "HELiOS Viewer" is selected during licence selection, while no licence for the "HiCAD Integration Module" can be found in the system, then only viewing functionalities are available in HELiOS, regardless of the selected basic module. You will receive a corresponding message.

IFC interface: Show HELiOS attributes

In the attribute mapping configuration for the data transformation between IFC and HiCAD, you can also export HELiOS attributes from Service Pack 2.

In the Configuration Editor at Interfaces > IFC > Default options for export > Attribute mapping configuration > Define you will find the new checkbox Display HELiOS attributes.

If this is activated, HELiOS attributes are also available for mapping in the pull-down menu of the source attributes.

ISD Configuration Editor - HiCAD 28.2.0.340 [C:\ProgramData\ISD Softwa	are und Systeme\HiCAD 2023\HiCAD.cfg	db]			– 🗆 🗙
File Edit View Extras ISD					
/ 🕥 🕄 🕴 🖳 🔢 📜 🛛 🗛	0,			User	- 🧟
▲ 🚰 HiCAD	Description		Value	Comment	_
A I Active configuration (Base configuration)	Interferencesian		IFC2X3 ~	The matching version is automatic	cally selected during
Drawing	Interface version		IFC2A5	import	
Automatic Export configuration				– 🗆 X	
Modelling		Attribute assignment			
🖻 🏢 Steel Engir 😭	Define properties	Display HELiOS attributes			
Metal Engi IFC attributes		Display HELIOS attributes			
Profile Inst Project					
Plant Engli A Elements		- HiCAD attribute			
Sheet Met IfcElement					
Assemblin IfcSpatialStructureElement Analysis Name		- HELiOS article attribute -			
Analysis Description					ing CS with the the IfcSite
Object lype		 HELIOS document attribut Article number (SACHNUMM 			theircone
Genera Genera		Based on (ERSATZFUER)	ien)		
Import Standard properties		CC (CC)			
JT/PLM User-defined properties		Changed by (HEL_GEAENDE	RT_USER)		
3-D PD		Changed on (HEL_GEAENDE			cted by the part
3DVS		Changed on (HEL_LINKED_D			
III Navisw		Checked by (GEPRUFT_NAM) Checked on (GEPRUFT_DAT)			
PRC		Class ID (HEL_KLASSEID)			
STL		Comment (BEMERKUNG)			
III U3D		Commercial weight (H_GEW	ICHT)		
III VRML		Construction section (CONS	TRUCTION_SECTION)		
III ANSYS		Created by (HEL_USER)			
🗅 🥅 Cadena		Creation date (HEL_GUELTIG))		
I FEMAR		Date send (DATE_SEND) Department (ABTEILUNG)			
III GAMM		Designation 2 (BENENNUNG	2)		
III Hyper		DOCTYPE_SIMPLE (DOCTYPE			
IFC IFC		Document category (DOKUA			
📰 LogiKa		Document ID (Head) (HEL_K			
mCS P		Document number (HEL_DO			
III Winlso		Document type (DOCUMENT DOCUMENT EXPORTELLENAL			
D DM		LITUCOMENT EXPORTEMENAL	VIE O JULIOMENT EXP	JKIEILEIVAPIEI	
Compatibility					
System settings					
Configurations					
Interfaces > IFC					

For further information, please refer to the HiCAD Help for Interfaces.

Service Pack 1 2023 (V 2801)

Deleting the item numbers when deriving

If you use HiCAD and HELiOS in the context of a project-specific working method in which the referencing option For main parts and sub-parts is set in the Configuration Editor at System settings > Referencing > Synchronize item numbers/part attributes when updating file, item numbers for derived parts are automatically deleted when the part structure is derived via the CAD structure or when a derivation is created via the HELiOS Desktop.



Open STEP file via HELiOS in HiCAD

When opening an object for editing in HELiOS with the **Open+Edit** function, it is intended that documents are opened for editing in the corresponding application. For example, .SZA files are opened in HiCAD.

This also applies to other formats such as STEP files (.stp) if they have been assigned HiCAD as the opening application via the Windows properties.

Under such conditions, if a STEP file is opened from HELiOS for editing, it is loaded for editing in HiCAD if HiCAD is already running, or HiCAD is started for editing the file if necessary.



Of course, opening a STEP file in HiCAD also works outside the HELiOS context by double-clicking in Windows Explorer.

New article class for part type Welding neck

If you use HELiOS in connection with the HiCAD module Plant Engineering, a new HELiOS article class is available from Version 2023 SP1 onwards with the new part type **Welding neck**.

5			
ass name:	Welding neck		
sk name:	sml_collar		
Article	h conditions —	mm	2
	Connection type:		
	Pipe part properties Wall thickness (2): mm Schedule: Pressure:	Fitting Preferred type: Accessory set:	010

You must inform HELiOS of the new classification for welding neck flanges. This is done via the programme **DBPlantDataImport.exe**, which you will find in the HiCAD exe directory. There you click on the button **Update HELiOS for Plant Engineering**.

1ask >	Documents × Graphic	× Targets	X Use X Pr	oduct structure >	Vtilized items	🗙 📑 Welding ne	ck ×	4		
	Connection 1				(2)	8	Classificatio	n	- 0	
	Nominal diameter:						🔍 Find			1
	Outer diameter (1):				A A		Plant Engineer	ing • Welding neck		4
	Connection type:	20002 1 51000	10					ing , weiding neck		1 3
	Connection type:	20002 1 51000	10		1 -	\	Name		Mask Name	
						\		Pipe clamp	sml_rohrhalterung	
	Connection 2						🗆 📄	Pipeline	sml_rohrleitung	
					Y			Pipeline plan		
	Connection type:	10000								
								Pump	sml_pumpe	
	Pipe part properties		Fitting					Reducer, asymmetric	sml_reduzierung	
	Pipe part properties		-nung					Reducer, symmetrica	sml reduzierung	
	Wall thickness (2):		Preferred type:							
	Schedule:		Accessory set:					Seal	sml_dichtung	
			-					Straight pipe, round	sml_rohr	
arch result –								T-piece, round	sml_tstueck	
🦷 🍓 s	andard a								-	
								Valve	sml_2warmatur	
	In In W Designation	Part type	Standard designation	Creation date	Created by	Outer diam Wall		Vessel	sml_behaelter	
026702	Welding neck ISO	Raw-part+Plant-de		24.11.2022	Administrator			Weld gap	sml_spalt	
026703	Welding neck ISO	Raw-part+Plant-de		24.11.2022	Administrator	14				
026704	Welding neck ISO	Raw-part+Plant-de Raw-part+Plant-de		24.11.2022	Administrator Administrator	14	1 🗸 🗸	Welding neck	sml_collar	
020703	 Weiding neck ISO 	Raw-part+Plant-di	esig KO-FI 10557	24.11.2022	Administrator	14	-			

Afterwards you can use the HELiOS search mask in your HELiOS Desktop.

Transfer of the HiCAD sheet structure

When saving SZA files to HELiOS, the HiCAD sheet structure is also transferred to HELiOS. This contains the number of sheets and the **Type**, **Sheet number** and **Sheet name** for each sheet.

The sheet structure of SZA documents can then be viewed in the document master on the tab **Model structure**:

Mask \times Extended mask \times Grap	ohic		× Sources	\times	Targets × Model structure ×
🖘 🖂 Standard 🔹 ♥	₽1				
Sheet structure	0 [.]	0	Document number	In	Designation
DN-000025		Þ	DN-000025		Production drawing
illi 3-D Model					
🔛 Sheet 1					
🔛 Sheet 2 (Internal information)					
🖾 Sheet 3					

When printing documents via HELiOS, this sheet structure is also displayed accordingly for the selection of the sheet area to be printed:

🚔 Print														
,≥		Sta	ndard	•										
Print	Ö	Ö	Document number	In	In	W	Designation	Article		Pro	ject	Folder	Sheet area	
✓		Þ	DN-000025		Σ	0	Production drawing	SN-000014	😣	PN-0	D1-06-K 🛛 🔝 …		Sheet 2	8
											Existing HiCAI Please make a chc all 3-D Model all 3-D	ice.	OK Canc	×

Please note that when updating to HELiOS 2023 (V. 2800) in combination with a HiCAD version older than HiCAD 2023 (V 2800), printing of SZA files via HELiOS is no longer possible due to this change.

In this case, you will receive a corresponding message during the installation:



A migration of inventory data can then be automatically carried out when HiCAD is started with HELiOS.

This applies to the following HiCAD Versions:

- HiCAD 2021: As of Version 2601.6
- HiCAD 2022: As of Version 2702.3
- HiCAD 2023: As of Version 2800.0

HiCAD-specific HELiOS settings moved to Configuration Editor

As of version 2800, HiCAD manages some attributes that previously had to be defined in the HELiOS settings.



A: up to HiCAD / HELiOS 2702 (HELiOS Options > Datenbank), B: from HiCAD / HELiOS 2800 onwards (ISD Configuration Editor: PDM > HiCAD-HELiOS interface).

When updating the database scheme you will receive the following message:

 \times HeliosDbUpdate The following settings have been transferred from the HELIOS database options to the HiCAD Configuration Editor from HiCAD 2800.0 onwards: "General" tab: - "Article attribute for defined weight" - "Article attribute for surface area" - "Article attribute for material (weight-relevant)". - "Article attribute for body volume (weight-relevant)" "HiCAD" tab: - "Allow printing of modified read-only documents" - "Scale attribute" - "Plot stamp attribute" If you are working with HiCAD, please check from Version 2800.0 onwards whether the values of the database options stored in HELiOS correspond to those in the HiCAD Configuration Editor. If necessary, you must adjust the values in the HiCAD Configuration Editor accordingly! For compatibility reasons, the HELiOS database options will remain in the next HELiOS versions. OK

New ISD Report Manager

As of HELiOS 2023 / HiCAD 2023, a new version of the ISD Report Manager will be introduced for the issuance of bills of materials, which is much simpler and more convenient, especially when configuring BOM templates.

Detailed information can be found in the Online Help chapter for the ISD Report Manager.

HiCAD - HELiOS Head ID

As of HiCAD 2023, it is no longer possible to specify the Head IDs of articles and documents in HELiOS. This ID was previously used by the catalogue editor and the DBPlantDataImport/PartDataAutoSync tools to find articles again.

Now, unique IDs are assigned by the variant editor itself and transferred to HELiOS during matching. These IDs are directly visible in HELiOS, as they are not a regular article attribute.

The new IDs are only directly visible in a few places in HiCAD:

- When matching with the catalogue via the tool VarToCat, an additional table column PLANTID is inserted.
- In P+ID, the new ID becomes visible in the attribute **Database article ID** when assigning article data.
- After a part has been installed, the PLANTID is also found in its part attributes.

HELiOS for AutoCAD

Major Release 2023 (V 2800)

AutoCAD 2023

With the release of HELiOS 2023 (V 2800) the Multi-CAD-interface of HELiOS also supports AutoCAD (and AutoCAD Mechanical) in the current Version 2023.

HELiOS for Autodesk Inventor

Service Pack 2 2023 (V 2802)

Exchange / Exchange all

The functions **Exchange** and **Exchange all** functions have been further refined to adapt the HELiOS interface to the behaviour of special cases in Inventor.

There are use cases in which one of the exchange functions is used although the corresponding part does not actually have to be exchanged geometrically, e.g. one of the following situations:

- A document is linked to two articles. In an assembly, the current article is to be exchanged for the other linked article.
- A document is linked to an article with different article indices. In an assembly, the article's built-in index is to be exchanged for its newer version.
- An article saved in the context of the model structure without a document link is to be exchanged for another article or article index.

All these exchange scenarios are implemented accordingly by HELiOS. Article contexts are taken into account and changed if required.

Inventor 2023

With the release of HELiOS 2023 (V 2800), the multi-CAD interface of HELiOS also supports Inventor in the current version 2023.

Exchange / Exchange all

To improve performance, thefunctions **Exchange** and **Exchange** and **Exchange** all, which allow you to replace components of the **active part** using HELiOS's **Combined search** function, have been modified:

The superordinate assembly must have been set to edited mode to be executed (if it is not, you will receive an appropriate message). In addition, the model structure is considered in this operation only on the level where the component is replaced. This procedure by HELiOS behaves analogously to the local exchange procedure of Inventor and saves computing time

HELIOS for **SOLIDWORKS**

Major Release 2023 (V 2800)

Open, with options: Large design review

HELiOS supports the three **Mode** setting options of SOLIDWORKS assemblies: **Resolved**, **Lightweight** and **Large design review**.

When loading SOLIDWORKS assemblies with the **Open, with options** function, for example also via the HELiOS Desktop, you have the option in the extended dialogue window under **Mode** to choose one of the three options when opening.

Cpen, with options
✓ Open read-only
Mode:
 Resolved
🔿 Lightweight
O Large design review
Updating of attributes:
 According to pre-setting
O For the opened document and all sub-structures
Only for the opened document
O Do not carry out
Updating of components to newer indices:
Occording to pre-setting ○ Never ○ Always ○ Not in released context
CANCEL OPEN

Please read the further notes on using the **Large design review** option as a viewing function and on putting together larger assemblies using this option.

Also, as of HELiOS Version 2023 onwards, you can also call the **Open, with options** function directly from the HELiOS menu or the HELiOS Ribbon in SOLIDWORKS, instead of exclusively from the context menu or document detail windows as in previous versions.

Batch import

The **Batch import** has been extended by a progress indicator with cancel option.

In this context, please note that Batch update and Batch reimport may only be executed with administrator rights.

Navisworks Interface

Major Release 2023 (V 2800)

Support of Navisworks 2023

The Major Release HELiOS 2023 (Version 2800) supports the current Navisworks Version 2023.

HELIOS & EPLAN

Service Pack 1 2023 (V 2801)

Support of EPLAN 2023

HELiOS 2023 Service Pack 1 (Version 2801), supports the current EPLAN Version 2023.

Server Monitor: HELiOS Article Synchronisation

With the release of HELiOS 2023, the Server Monitor tool was introduced for monitoring the runnability of HELiOS server applications.

With Service Pack 1, it was extended to include the option of monitoring HELiOS Article Synchronisation in the context of EPLAN interfaces.

	X	Settings	
Figure General	🐲 Sett	tings for HELiOS article :	synchronisation
Netrios Vault Server	- General -		
🦓 HELiOS Article Synchronization	Port:	35727	
	Interval:	60 s	
	– Time-out		
	Response ti	me:	30 s
	Response ti	me of error detection:	60 s
			CANCEL

	💠 Add server monitoring	
Choose a server a	application: HELiOS Article Synchronization	•
- Connection -		
Server:	dedtm184	
Port:	35727	
- Configuration	1	
Name:	HELiOS Article Synchronization	2
Version:	28.1.0.244	2
Interval:	60	s
Log:		
	CANCEL	OK

Support of EPLAN 2022

The Major Release HELiOS 2023 (Version 2800) supports the current EPLAN Version 2022.

Improvements and extensions

With the update to HELiOS 2023 (Version 2800), a number of improvements have been made and extensions implemented in the area of the EPLAN interface:

- The attribute mapping was adapted to the latest state of the art.
- In the article synchronisation service, the possibility of resynchronising articles that could not previously be overwritten in HELiOS was created. E.g.: Modification of a resource whose HELiOS article master has already been released. A new configuration switch ensures that the HELiOS article master is directly resynchronised.
- There are improvements in the area of bill of materials and product structure reconciliation, e.g. regarding the recognition of EPLAN product structure items.
- In the case of multi-level BOMs, as with the EPLAN project itself, PDFs stored for installation locations are also transferred to HELiOS accordingly.

 If desired, it is also possible not to manage EPLAN project files in HELiOS, but to leave them in the EPLAN file system.

HELIOS Options				
General	EPLAN Article Synchronization			
Tisplay	– Attribute assignments –			
Result lists	Transfer to HELIOS: ATTRIBUTE IMPORT			
Print	Export from HELIOS: ATTRIBUTE EXPORT			
Import/Export	– Settings			
Workflow	Login:	Administrator (PDM Administrators)		
Je Log		APPLY CURRENT USER		
Database	Workflow for article creation:	Part (R) 👻		
Document type	Scan interval:	15 s		
Inventor	BOM format:	XML 👻		
	Index of article number characteristic:	1		
AutoCAD	Index of ERP number characteristic:	2		
EPLAN	HELiOS attribute for EPLAN article number:	EPLAN_ARTNUM		
EPLAN Article Synchronization	Skip write-protected items during import			
Word	Synchronize articles only if the following condition is met			
x Excel	Attribute name:			
Attribute value:				
Undo changes to read-only articles in EPLAN				
	- Directories			
	Import directory for article:			
	C:\Users\Public\EPLAN\ERP-PDM Integration S	Suite\Transfer_Parts_PDM2EPLAN		
	Export directory for article:	_		
	C:\Users\Public\EPLAN\ERP-PDM Integration Suite\Transfer_Parts_EPLAN2PDM			
	Directory for complete article export			
C:\Users\Public\EPLAN\ERP-PDM Integration Suite\TransferPartsFullExport				
MANAGE		CLOSE APPLY		

HELiOS for Zuken E3

Service Pack 1 2023 (V 2801)

Server Monitor: HELiOS Article Synchronisation

With the release of HELiOS 2023, the Server Monitor tool was introduced for monitoring the runnability of HELiOS server applications.

With Service Pack 1, it was extended to include the option of monitoring HELiOS Article Synchronisation in the context of Zuken E3 interfaces.

💥 Settings				
🕖 General	(A)			
ᆶ HELiOS Spooler	Settings for HELiOS article synchronisation			
HELiOS Vault Server	- General			
HELiOS Article Synchronization	Port: 35727			
	Interval: 60 s			
	- Time-out			
	Response time: 30 s			
	Response time of error detection: 60 s			
	CANCEL			

👍 Add server monitoring				
Choose a server application: HELiOS Article Synchronization				
- Connection -				
Server:	dedtm184			
Port:	35727			
- Configuration				
Name:	HELiOS Article Synchronization	2		
Version:	28.1.0.244	2		
Interval:	60	s		
Log:				
	CANCEL	ОК		

Legal notes

© 2023 ISD ® Software und Systeme GmbH. All rights reserved.

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

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



Germany

Headquarter Dortmund ISD Software und Systeme GmbH Hauert 4 D-44227 Dortmund Tel. +49 231 9793-0 info@isdgroup.de

Sales office Hamburg ISD Software und Systeme GmbH Strawinskystraße 2 D-25337 Elmshorn Tel. +49 4121 740980 hamburg@isdgroup.de

Sales office Nuremberg ISD Software und Systeme GmbH Nordostpark 7 D-90411 Nuremberg Tel. +49 911 95173-0 nuernberg@isdgroup.de

International

ISD Austria ISD Software und Systeme GmbH Hafenstraße 47-51 A-4020 Linz Tel. +43 732 21 04 22-0 info@isdgroup.at

ISD Benelux - Zwolle ISD Benelux B.V. Grote Voort 293A NL-8041 BL Zwolle Tel. +31 73 6153-888 info@isdgroup.nl

ISD Switzerland ISD Software und Systeme AG Rosenweg 2 CH-4500 Solothurn Tel. +41 32 624 13-40 info@isdgroup.ch

ISD USA - North Carolina ISD Group USA Inc. 20808 N Main Street, Suite 101 USA-Cornelius NC 28031 Tel. +1 770 349 6321 info@isdgroup.us

www.isdgroup.com

Sales office Berlin

ISD Software und Systeme GmbH Paradiesstraße 208a D-12526 Berlin Tel. +49 30 634178-0 berlin@isdgroup.de

Sales office Hanover ISD Software und Systeme GmbH Hamburger Allee 24 D-30161 Hanover Tel. +49 511 616803-40 hannover@isdgroup.de

Sales office UIm ISD Software und Systeme GmbH Wilhelmstraße 25 D-89073 UIm Tel. +49 731 96855-0 ulm@isdgroup.de

ISD Benelux - Hertogenbosch ISD Benelux B.V. Het Zuiderkruis 33 NL-5215 MV 's-Hertogenbosch Tel. +31 73 6153-888 info@isdgroup.nl

ISD France ISD Group France SAS 10 -12 Boulevard Vivier Merle F-69393 Lyon Tel. +33 6 73 72 04 67 info@isdgroup.fr

ISD Switzerland ISD Software und Systeme AG Rte du Jura 37 A, 4. Étage CH-1700 Fribourg Tel. +41 79 803 51 51 info@isdgroup.ch

ISD USA - Georgia ISD Group USA Inc. 5126 South Royal Atlanta Drive USA-Tucker GA 30084 Tel. +1 770 349 6321 info@isdgroup.us

HELiOS_2802

This document is generated automatically. © 2023 ISD Software und Systeme GmbH