HELiOS

UNLIMITED PLM PERFORMANCE **DEVELOPED BY ISD**

HELiOS 2026 - What's new?

Version 2026

News Overview

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THE WORLD OF CAD AND PDM SOLUTIONS

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Notes on HELiOS Updates

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.

HELiOS Workspaces: Conversion of the system directories

When updating from an older version to HELiOS 2025 (Version 30.0.0) or higher, please note that the directory structure will change. Since an automated migration is not possible, all users have to check out all data and empty their workspaces before installing the update to avoid data loss.

In previous versions, the workspaces were located at %localappdata%. This meant that different workspaces could be located on one system. To prevent this, the update to HELiOS 2025 will move the workspaces to the **%programdata%** directory.

Checked-out files are then stored at **%programdata%\ISD Software und Systeme\HELiOS Workspace\(...)*** (*plus Location ID and User ID). The workspace databases are stored version-dependently at **%programdata%\ISD Software und Systeme\HELiOS <Version>\Location-ID**.

Notes on update installations

For an update installation of a HELiOS version older than HELiOS 2020 (version 2500), a central update of the supplied HELiOS database must be carried out..

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.

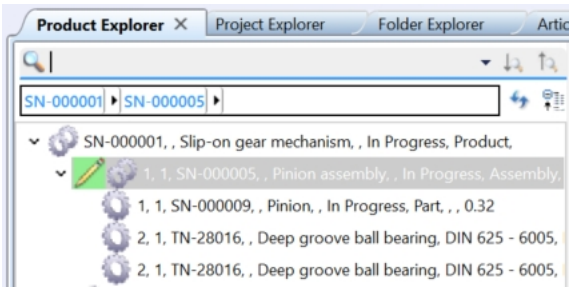
HELiOS Desktop

Service Pack 1

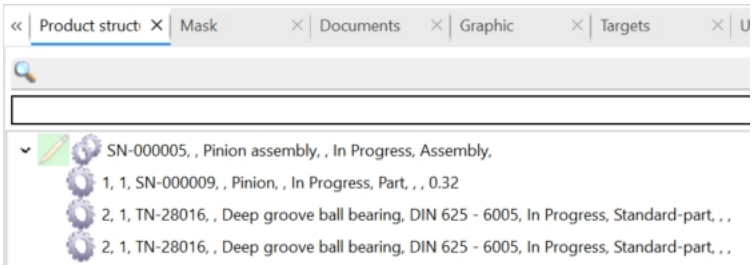
Product structure

In the context of the product structure, note the following behavioural adjustment when manually reserving 1-level assemblies for editing:

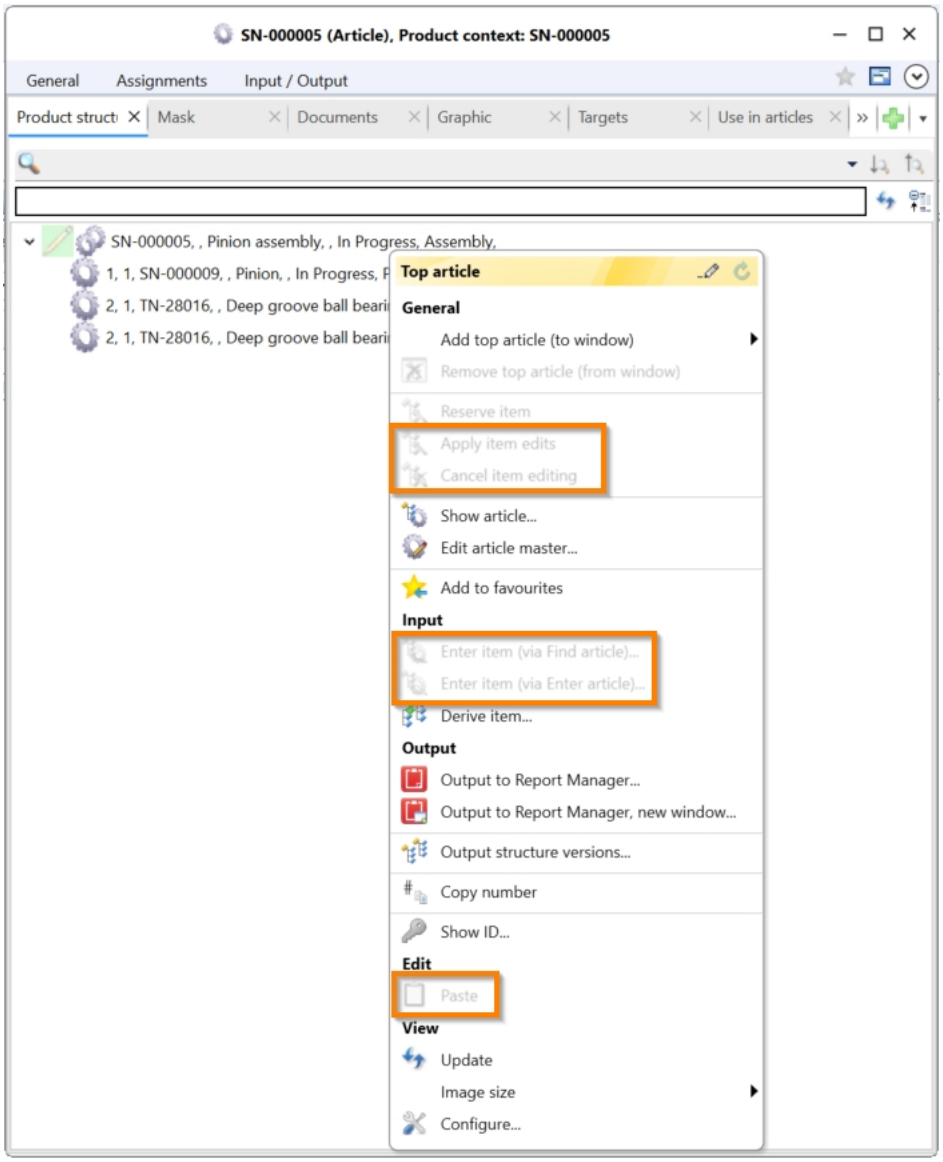
When using a direct function such as **Reserve item** from the product context menu, or when comparing product structures from a linked CAD application, 1-level assemblies in the product structure are set to "In progress" and will then be locked for others by the corresponding user. The corresponding 1-level assembly is marked in the product structure with a pencil symbol and a green background:



In other areas of the HELiOS user interface where the same item is also displayed in the product structure context, the green background is slightly lighter.



Processings of the product structure (adding, changing or deleting items) and reserving additional top parts for processing can only be done in the window from which the first active processing was started. In the other windows (with a paler marking), the corresponding context menu functions are not available (i.e. they are greyed out).



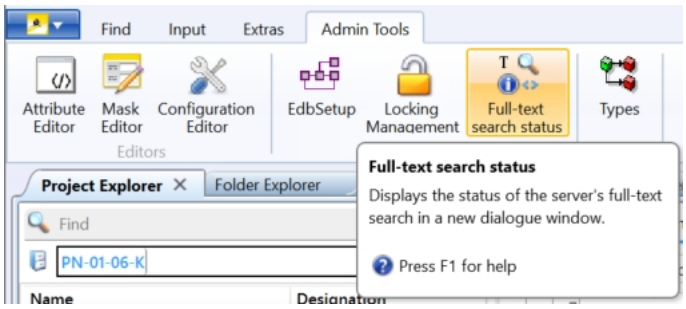
This "forces" manual reservations to be completed before the next processings of product structures are made.

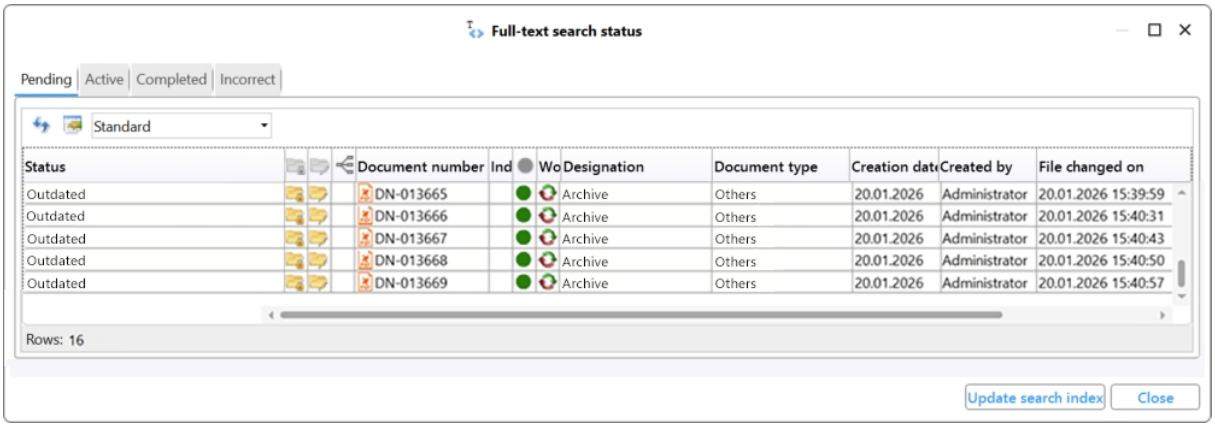
Please also note: If a construction kit is reserved for editing in the product structure of a (docked) article detail dialogue, this window will not be updated (even if other articles/documents are selected from the project explorer or similar) until the processings have been completed.

Full-text search

Full-text search status

You can update the search index for the full-text search newly introduced in HELiOS 2026 in Service Pack 1 via the extended dialogue window, which is opened via the new function **Admin Tools > Full-text search status** .





The **Full-text search status** then provides you with information on pending, active and completed document processing, as well as error messages for documents that could not be processed, on the various tabs of the window.

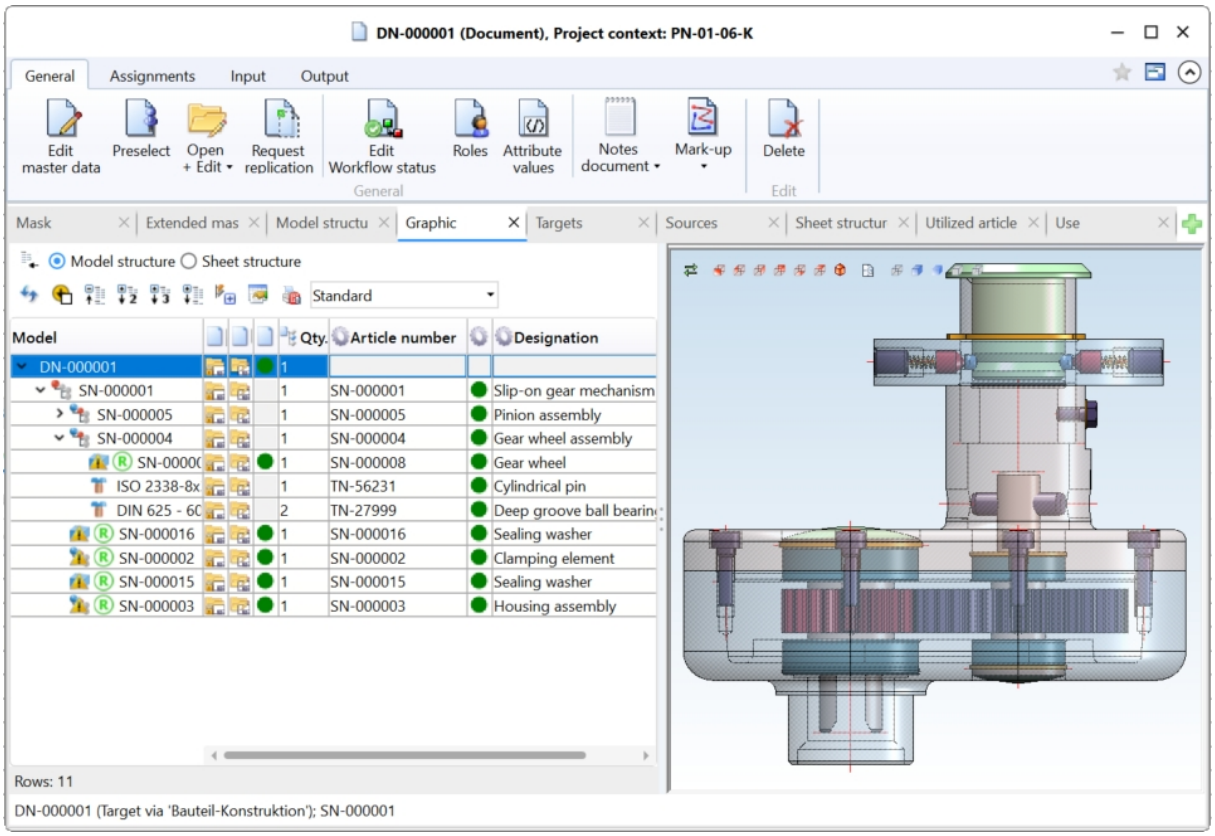
Content relevance as default sorting

With the update to Service Pack 1, the result list of the document full-text search is now sorted by default (in descending order) according to content relevance.

The default configuration of the result list has been adjusted accordingly.

HiCAD Viewer

With the update to Service Pack 1, the **HiCAD Viewer** is also available for detailed previews of SZA, KRA and FGA files with a revised and expanded range of functions.



You can switch between the **Sheet structure** and **Model structure** view of the HiCAD file and, in addition to its **Graphic** preview (in the areas of the HELiOS Desktop where it makes sense), you can also show and hide the corresponding structure tree in its results list display.

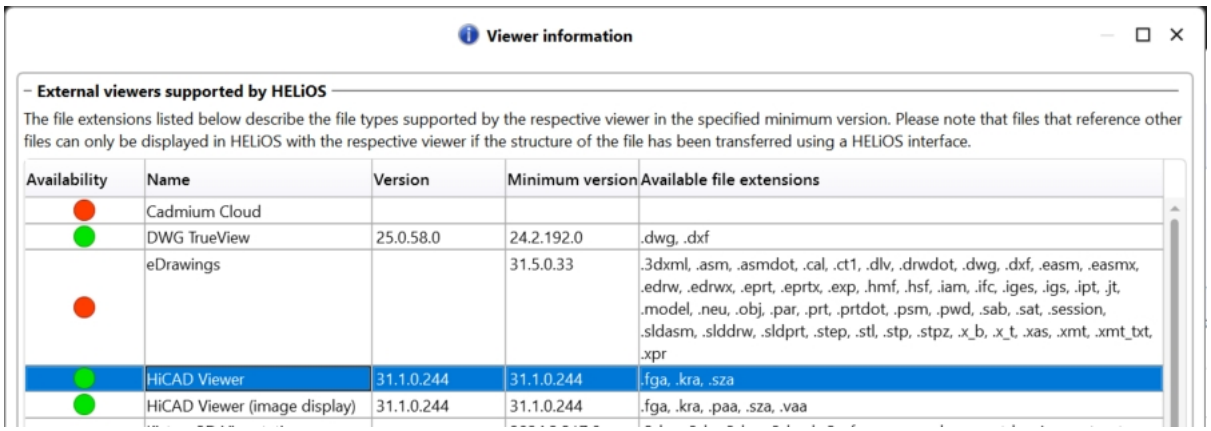
Selecting a design element in the structure display also selects it in the **Graphic** preview and vice versa.

The result list display can also be configured independently of the sheet structure and model structure results lists of the corresponding document detail window tabs.

Please note:

The HiCAD Viewer must be installed or updated separately on workstations where only the HELiOS Desktop (standalone) is installed and in operation in order to have the current range of functions available.

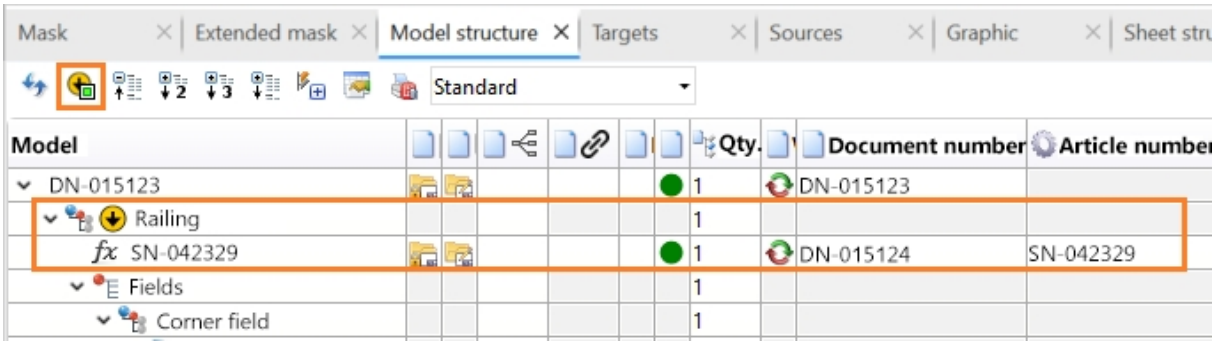
As part of the update, the minimum requirements for the viewer version in HELiOS have also been raised:



Model structure: Display base parts

In the button bar at the top of the **Model structure** (in document detail windows of HiCAD files), you can use **Do not display base parts** / **Display base parts** to control whether the base parts of dependent parts are shown in the model structure or not.

The result (when the base part is shown) looks something like this:



The dependencies from the HiCAD feature (in this example, the base part of the dependent part) are marked with the **fx** icon (for parametric) so that corresponding entries can be distinguished from the regular part structure of the document.

Please note that only the referenced document with its article context (if available) is displayed, not the entire structure of the base part (which has its own model structure).

The **Model** column is displayed analogous to the occurrences.

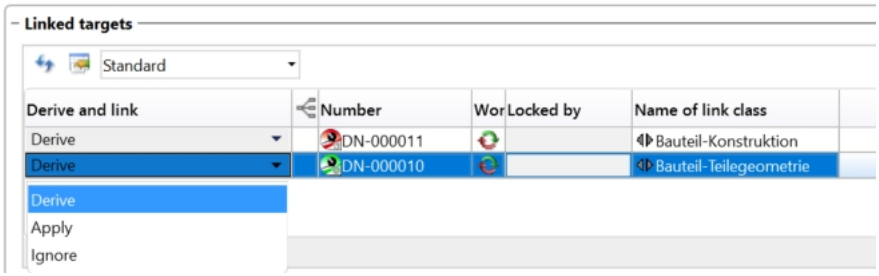
Derivation

Create derivation, with link

The extended dialogue window for deriving and linking documents, which appears after selecting **Create derivation, with link...**, has been enhanced.

In the **Derive and link** column of the **Linked targets** overview, you can set one of the following procedures for each linked document in the respective combo box:

- **Derive**: The corresponding document is derived and linked to the derived article master.
- **Apply**: The existing document is linked to the derived article master (but is not derived itself).
- **Ignore**: The document is ignored, i.e. it is neither derived nor linked to the derived article master.



Initialization

Please note the following adjustment to the programme behaviour for derivations:

In the input masks for derivations, project and folder contexts are initialized if they can be clearly determined.

There may be use cases in which the context cannot be clearly determined, for example, when a document is derived via Drag & Drop from the target result list of an article detail mask to that of another.

In earlier versions of HELiOS, the project number field of the document input for the derivation was set to Project-independent. This has been changed so that in this case, the project context of the source object is transferred to the article input mask of the derivation as a suggestion, provided that the source object is assigned to exactly one project.

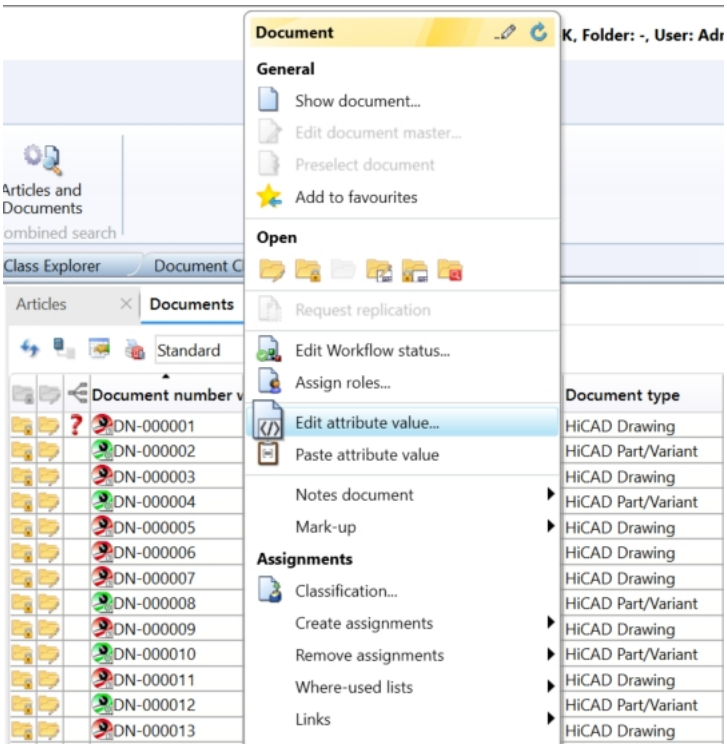
Of course, you can then change this initialization in the mask as usual via the project selection to another project or Project-independent.

Edit attribute value for multiple selections

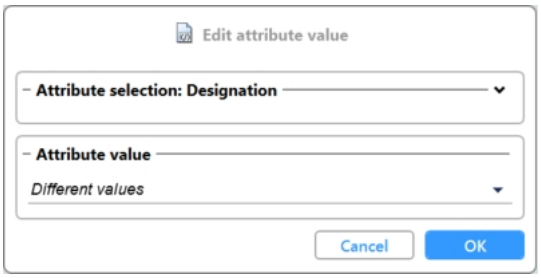
In the context menu of result lists, you can use the **Edit attribute value...** function to change the values of certain database attributes of HELiOS objects.

In earlier versions, the function call via multiple selections was limited to cases where the corresponding objects had the same attribute value assignment.

With the update to Service Pack 1, you can also use multiple selections to change differently assigned attributes (for the same entry).



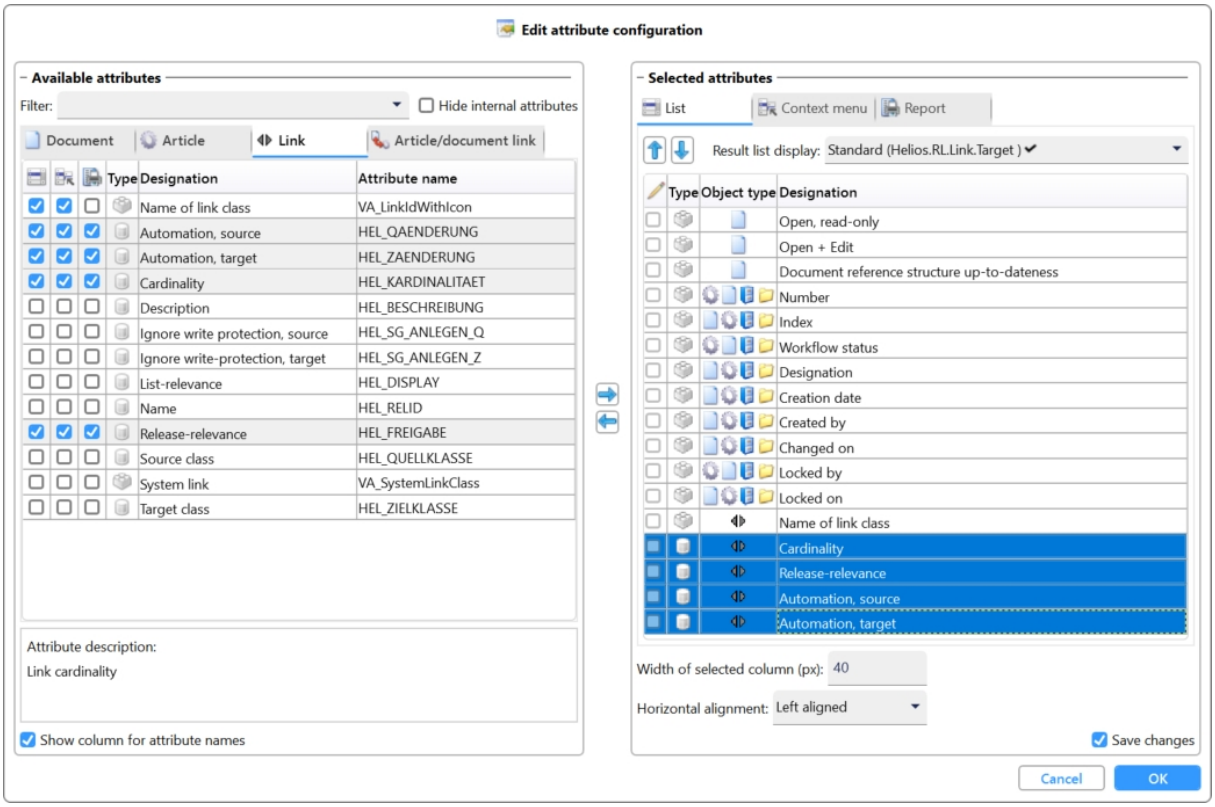
In this case, "Different values" is displayed in the **Attribute value** input field of the edit dialogue for illustration purposes.

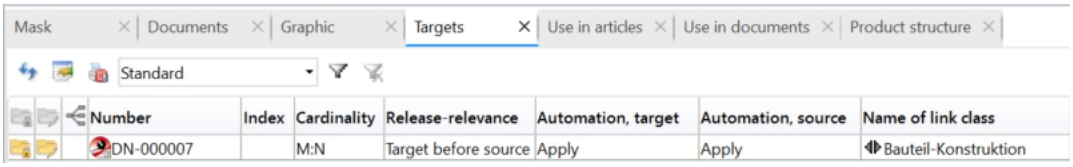


Improved output of system attributes

Further improvements to the HELiOS interface can be found, among other places, in the result lists with link information (e.g., the **Targets** tab in an item detail mask). Attributes that previously displayed integer values now output their information in a revised form:

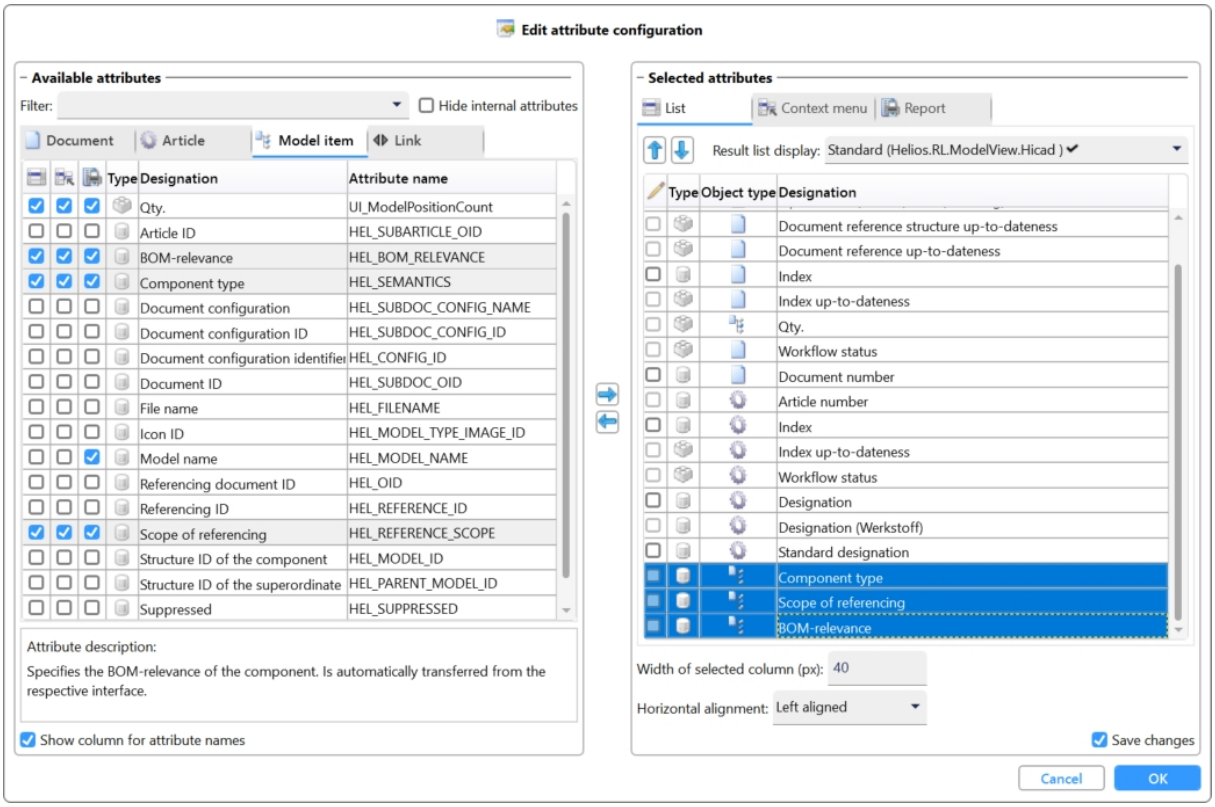
- **Cardinality** (HEL_CARDINALITY) specifies the link type, such as “N:M.”
- **Release-relevance** (HEL_RELEASE) displays link information on the release direction, such as “Target before source.”
- **Automation, source** and **Automation, target** (HEL_QAENDERUNG, HEL_ZAENDERUNG): Information such as “Apply” is displayed.

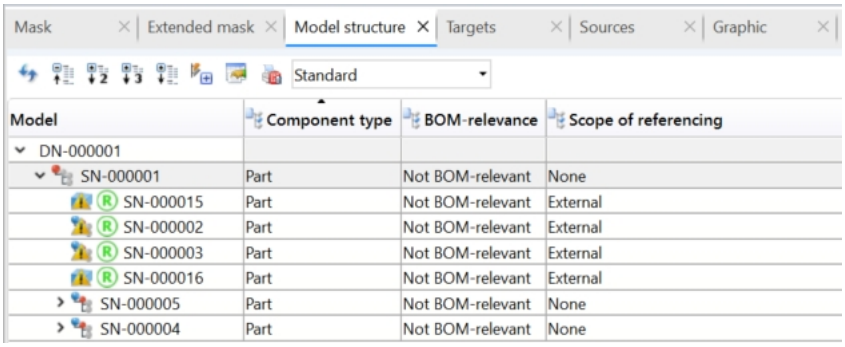




The following attributes are displayed in an improved form in the **Model structure** result list for documents:

- **Scope of referencing** (HEL_REFERENCE_SCOPE) displays information such as “External.”
- **BOM-relevance** (HEL_BOM_RELEVANCE) displays information such as “BOM-relevant” or “Not BOM-relevant.”
- **Component type** (HEL_SEMANTICS) outputs information such as “part” or “HiCAD standard part.”

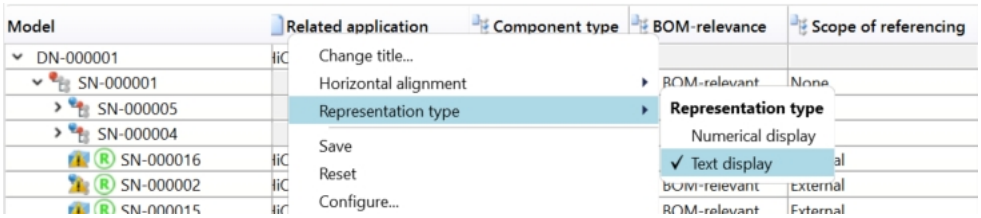




And the **Document** attribute **Related application** (HEL_APPLICATION) outputs information such as “HiCAD.”

In addition, fewer attributes are marked as **internal**.

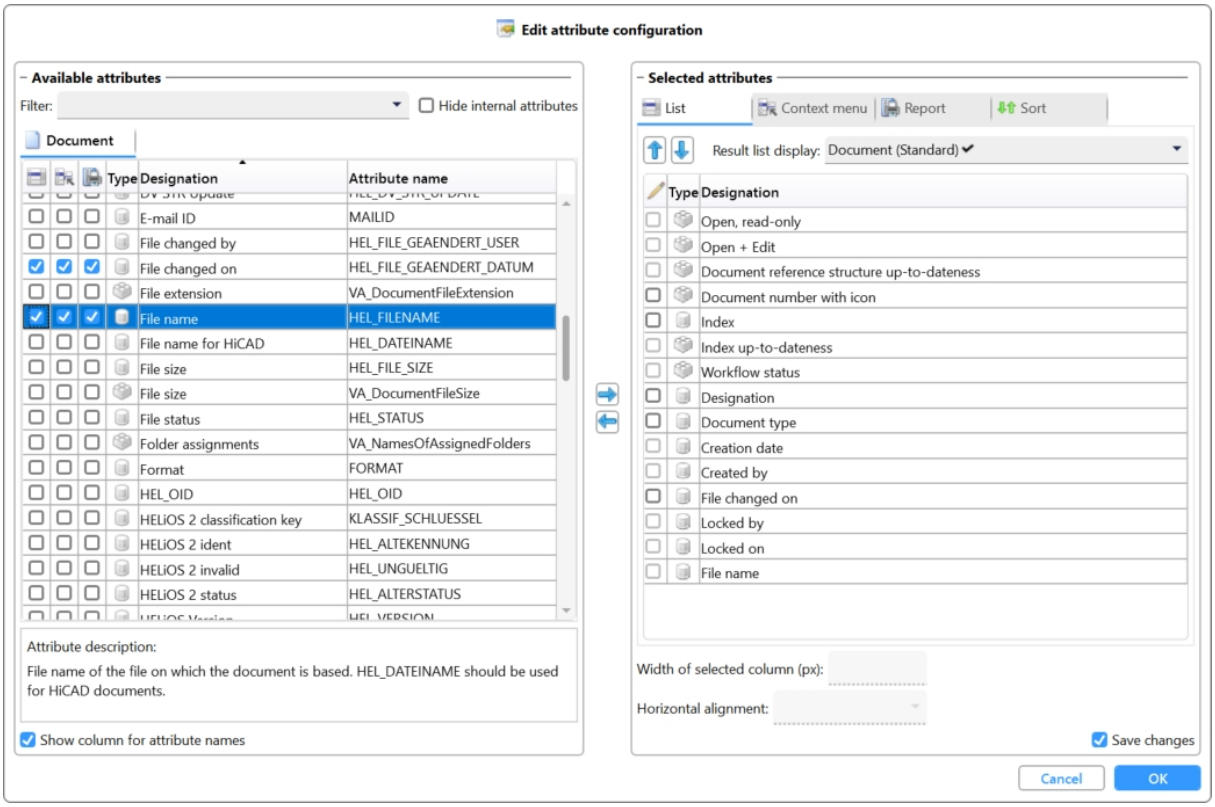
You can switch between the **Representation typeNumerical display** and **Text display** for these attributes. It is recommended to choose **Text display**.



Output of result list attributes to the Report Manager

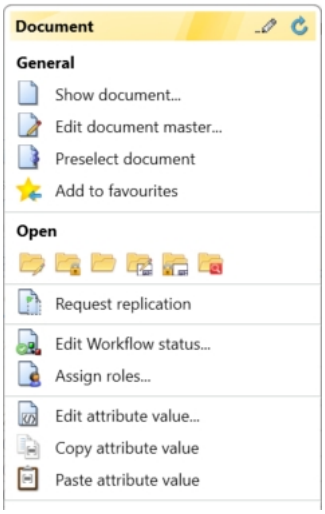
Please note a small change in the behavior of the result list configuration: When adding a HELiOS attribute by clicking on the left column in the selection area, the checkbox is set for all three columns:

Display as a column in result lists, as an attribute in the context menu, and as an attribute that is taken into account when outputting to the Report Manager.

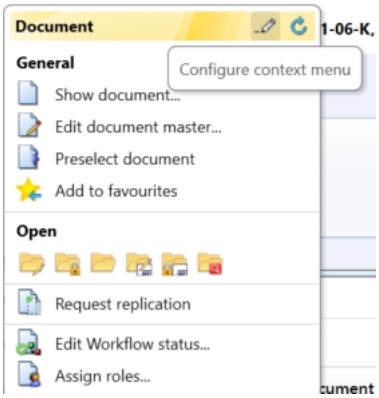


Context menus

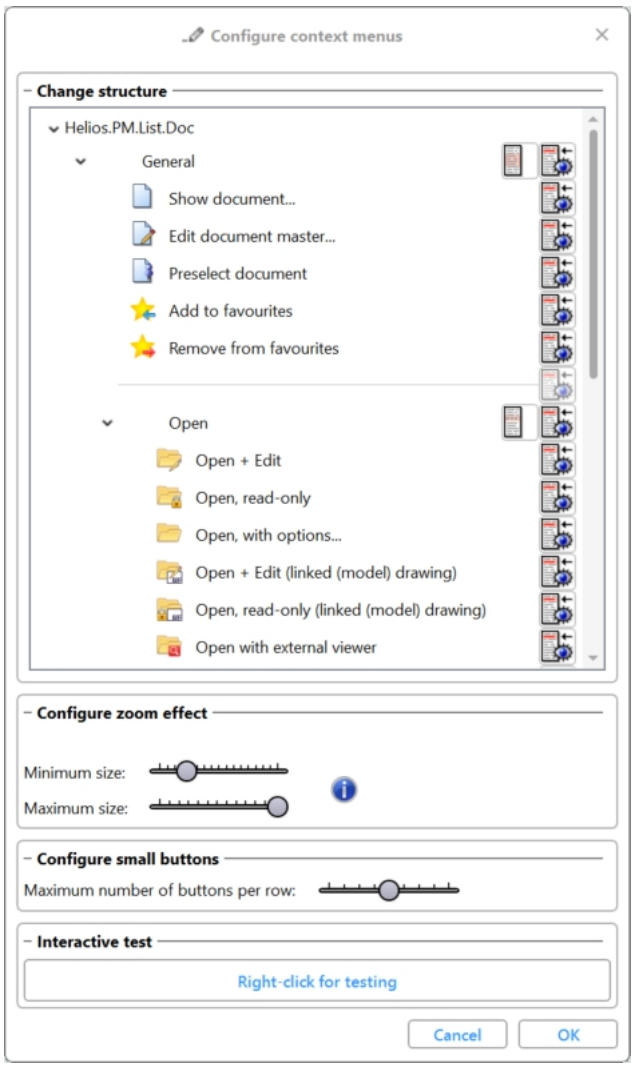
The context menu windows that open when you right-click on a HELiOS object have a new design:



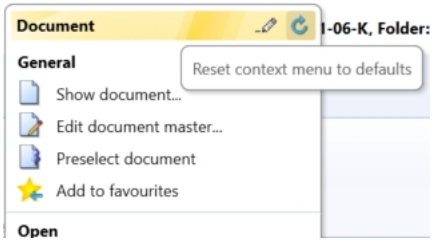
You can change the menu contents by left-clicking on the pencil symbol **Configure context menu** in the upper right corner of the context menu window.



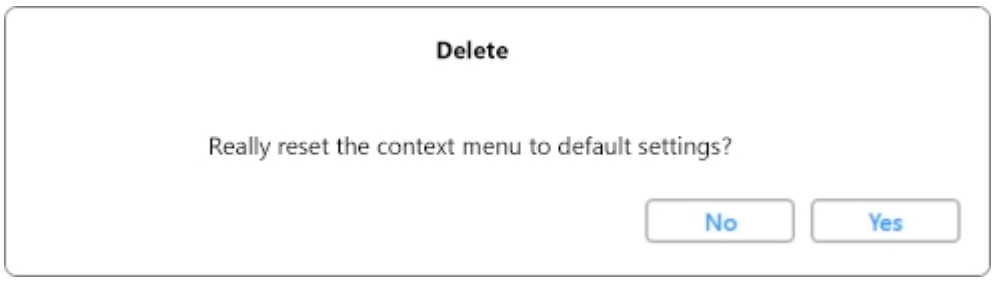
Both the configuration menu and the resulting display of the corresponding context menu windows have been improved.



You can now reset changed context menus to their default settings by clicking on the icon at the top right of the context menu.



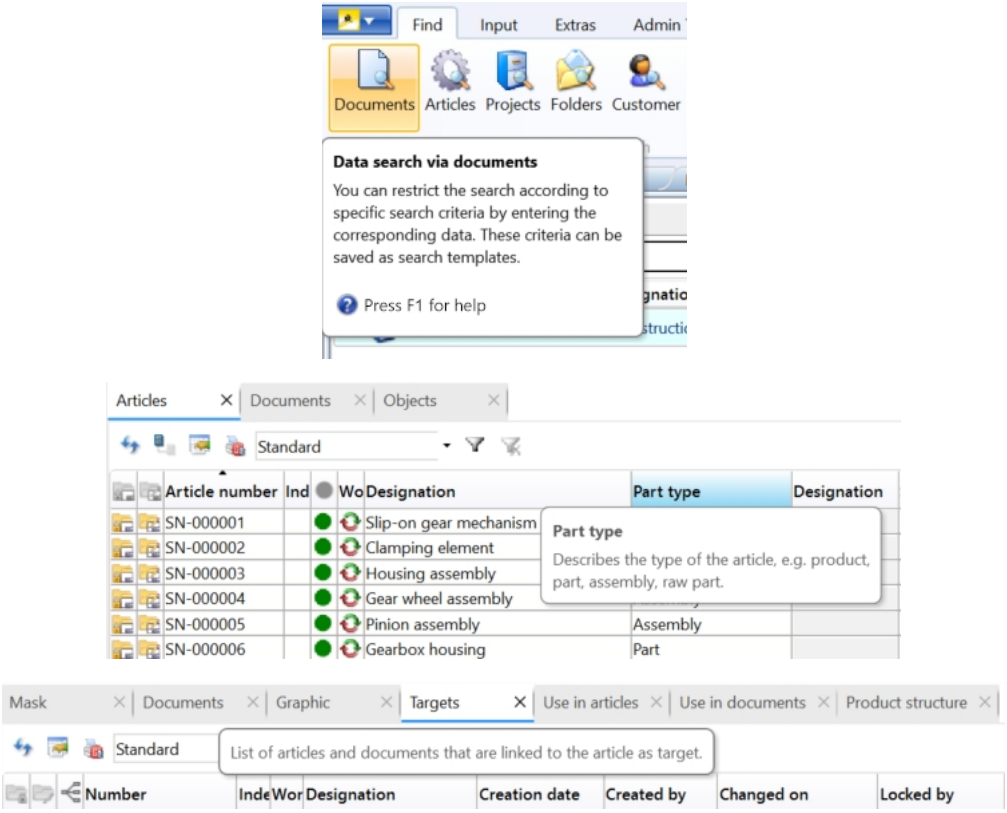
A security prompt will appear asking if you really want to reset the context menu:



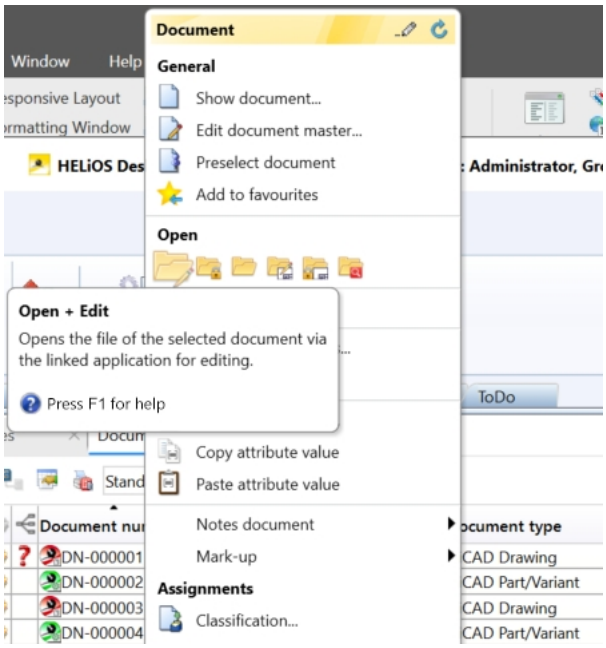
Tooltips

The mouse-over tooltips, which provide information about corresponding functions (e.g., ribbon bar buttons) or control elements such as column headers in result lists or tabs in object dialogues in many areas of the HELiOS Desktop interface, have been revised and expanded.

To increase their informative value, function names and attribute names are also displayed as headings for brief descriptions.



Tooltips are now also displayed in context menus, even on the small buttons:



Workflows

Please note some changes resulting from the revision and simplification of the HELiOS delivered database:

The so-called classic workflows are no longer included in the standard database delivered with HELiOS 2026 Service Pack 1.

This means that if you are already working with HELiOS and do not reinstall the current database, nothing will change for you at this point. If you are still working with the classic workflows, these will of course remain available to you.

For new installations of the HELiOS database, only the modern role workflows can be used.

With the elimination of the outdated classic workflows, the **"(R)**" identifier of the role workflows in older HELiOS versions has been removed.

In the course of this change, further adjustments have also been made to the HELiOS configuration tool EDBSETUP for workflow management:

Deleting standard workflows

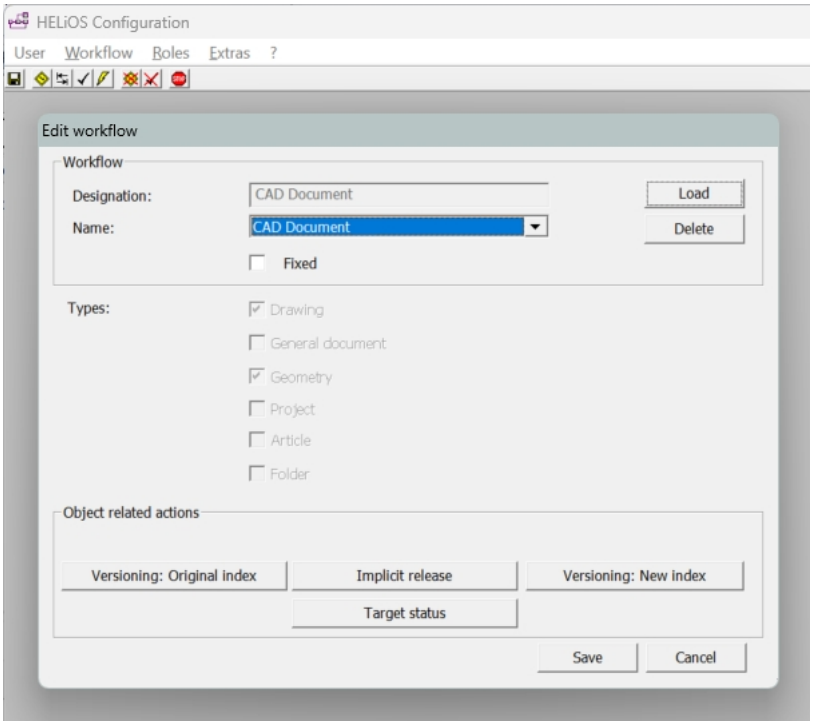
Pre-installed "standard workflows" that could not previously be removed can now also be deleted from the database.

There is no longer any distinction between standard workflows and deletable workflows.

This also applies after an update and not only after a new installation of the delivered database.

Assigning multiple types when creating role workflows

When creating new role workflows, it is now possible to assign more than one **Type** to documents, e.g. with the new **CAD Document** workflow:

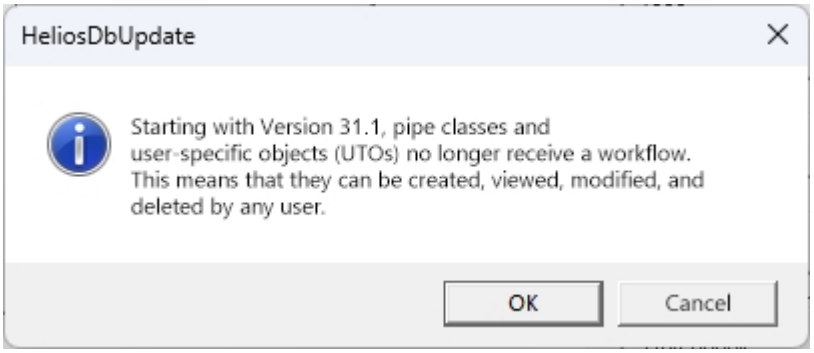


The selectable types have also been revised and modernised in the process.

Pipe class- and user-specific objects without workflows (HeliosDbUpdate)

Previously, access rights for pipe classes and user-specific objects (UTOs) were controlled by a background ("classic") workflow that was not visible on the objects themselves.

If you update the database schema from a version older than HELiOS 2026 SP1 to a newer version using the **HeliosDbUpdate.exe** tool, these workflows are automatically deleted. You will receive a corresponding message, which you must confirm with **OK**.



As a result, user-specific objects (UTOs) can be created, modified and deleted by any HELiOS user.

Further adjustments to EDBSETUP

Older functions and options that are no longer required have been removed from the EDBSETUP configuration tool.

Functions that are now irrelevant, such as those for user-specific object access rights (see above), are currently greyed out.

The **Workflow > Status** function can now be found under **Roles > Status**, and the **HELiOS Configuration > Master password** function can now be found under **Tools > Change master password**.

Functions that are no longer required, such as **Workflow object** or **Tools > Print options**, as well as the menu items **HELiOS Configuration** and **Workflow**, have been completely removed as a result of the revision.

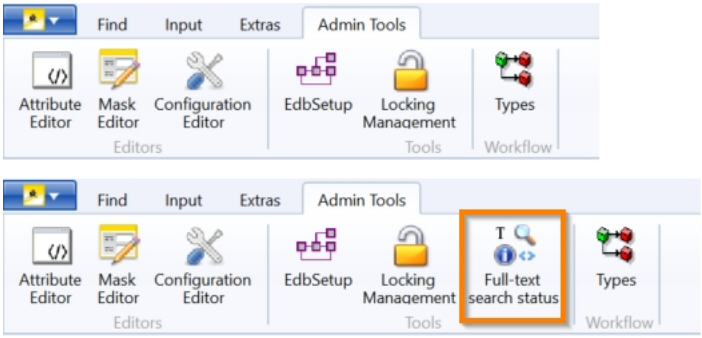
The Online Help currently still depicts a status that takes into account earlier content from the HELiOS standard database, such as the now obsolete classic workflows, especially as some of these are still in use. This will change in future versions.

Hide inactive elements in the ribbon

In earlier versions of HELiOS Desktop, some elements were displayed in the ribbon bar (inactive/greyed out) even if the corresponding component was not installed in the system.

With the update to Service Pack 1, inactive elements in the ribbon are completely hidden.

For example: If you have not installed the full-text search, no function calls for this are visible in the menu bar:



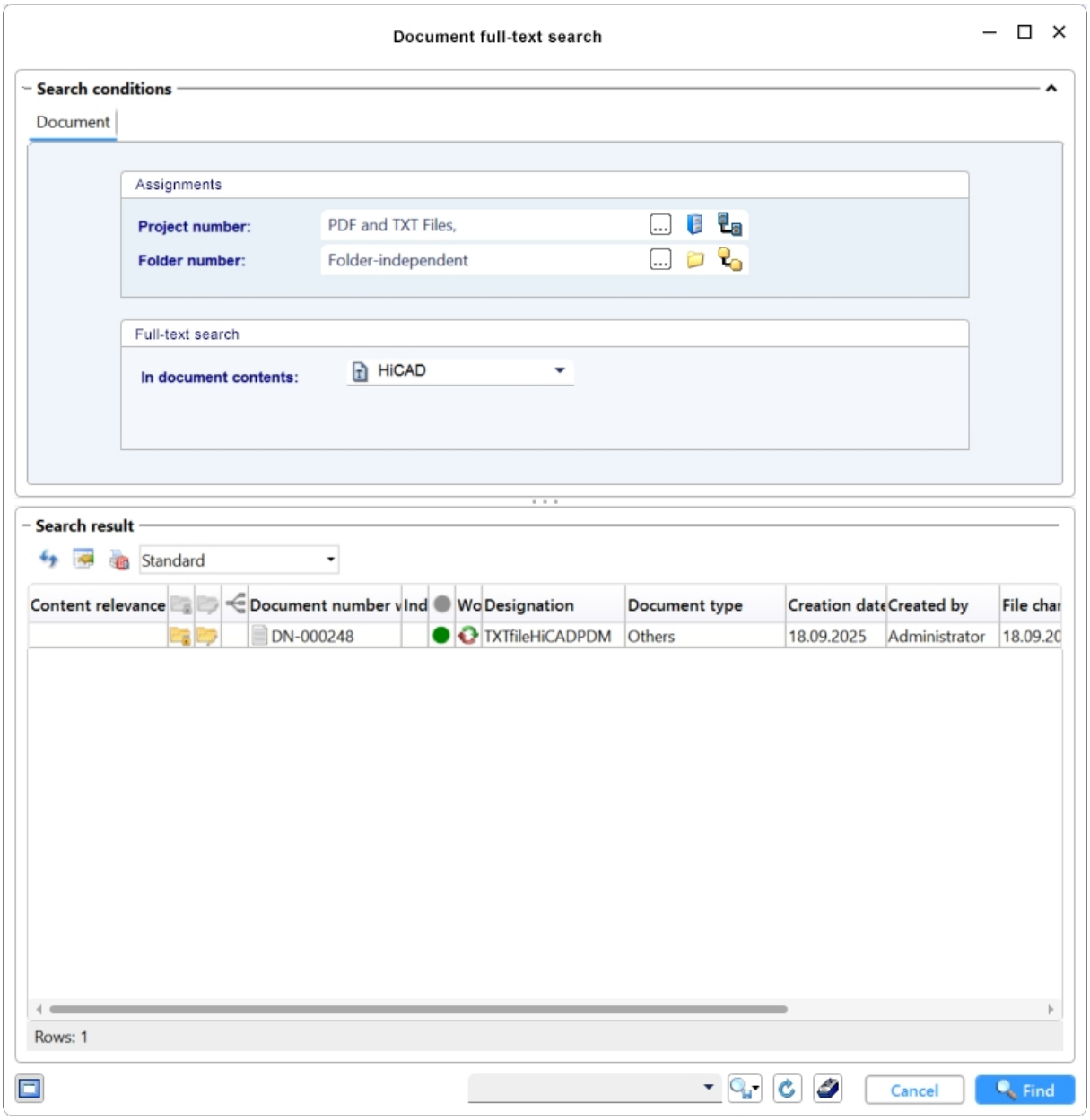
Major Release

Full-text search

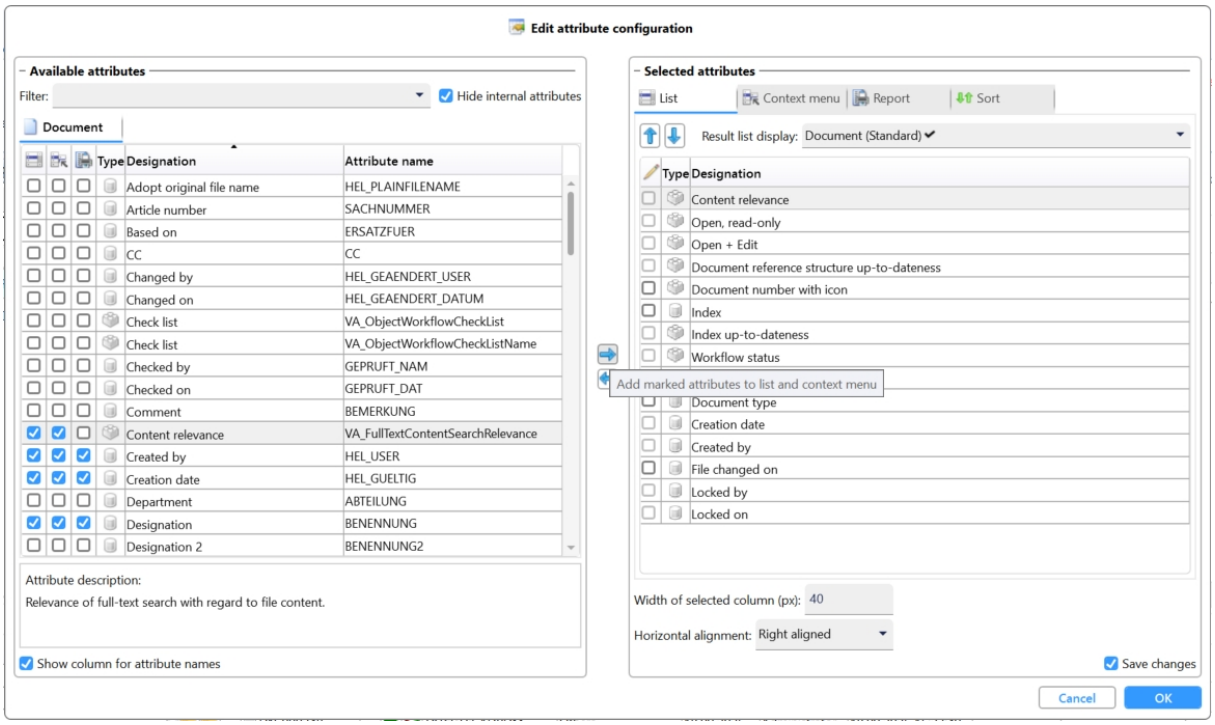
HELiOS 2026 offers the option of integrating a **Full-text search** function into your PDM system.

If you have installed the full-text search on the server and client side, you can also search for and find HELiOS documents of certain file types (text, PDF, emails) using content keywords.

For this purpose the new **Document full-text search** dialogue window is available via **Find > Full-text search > Documents** , and you can also integrate the full-text search into the "regular" document search.

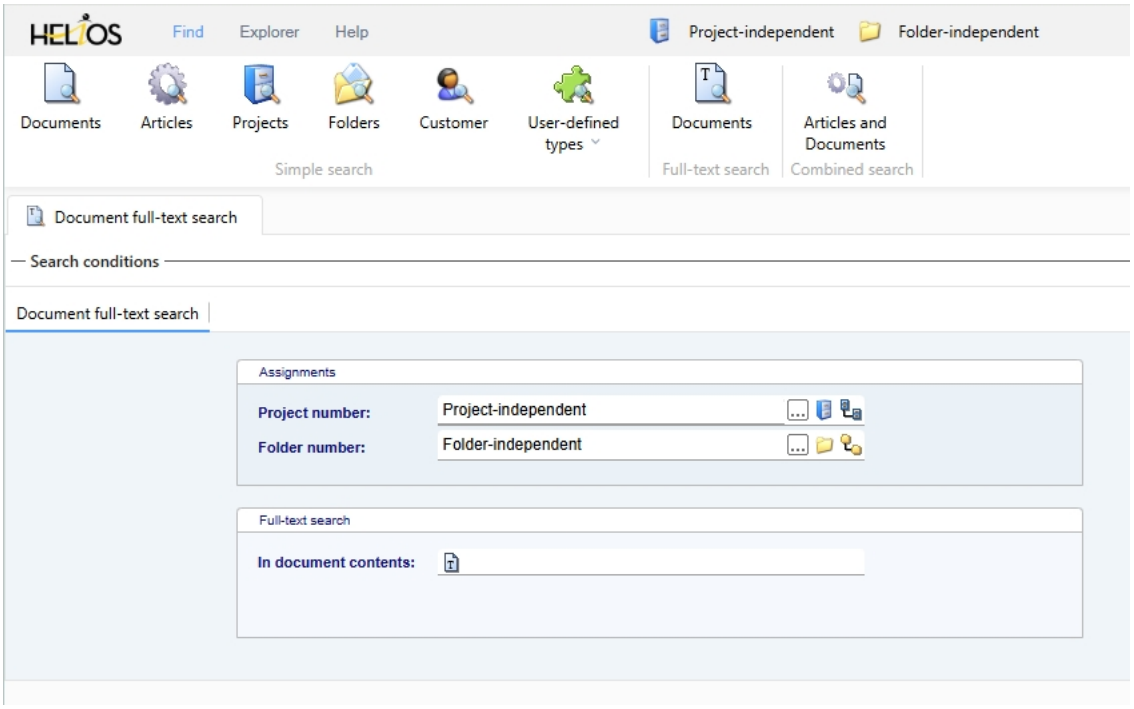


With the new virtual database attribute**Content relevance** , the search results can then also be sorted according to their percentage relevance to the full-text search result.



In the **Admin Tools** ribbon of HELiOS, you will find the function call **Update search index**, which you can use to initially index your HELiOS inventory data of the supported formats for full-text search and to trigger subsequent indexing.

The full-text search is also available in the **HELiOS Internet Server** user interface.



Model structure and Document references

Document reference structure up-to-dateness

A new attribute is available for document result lists:

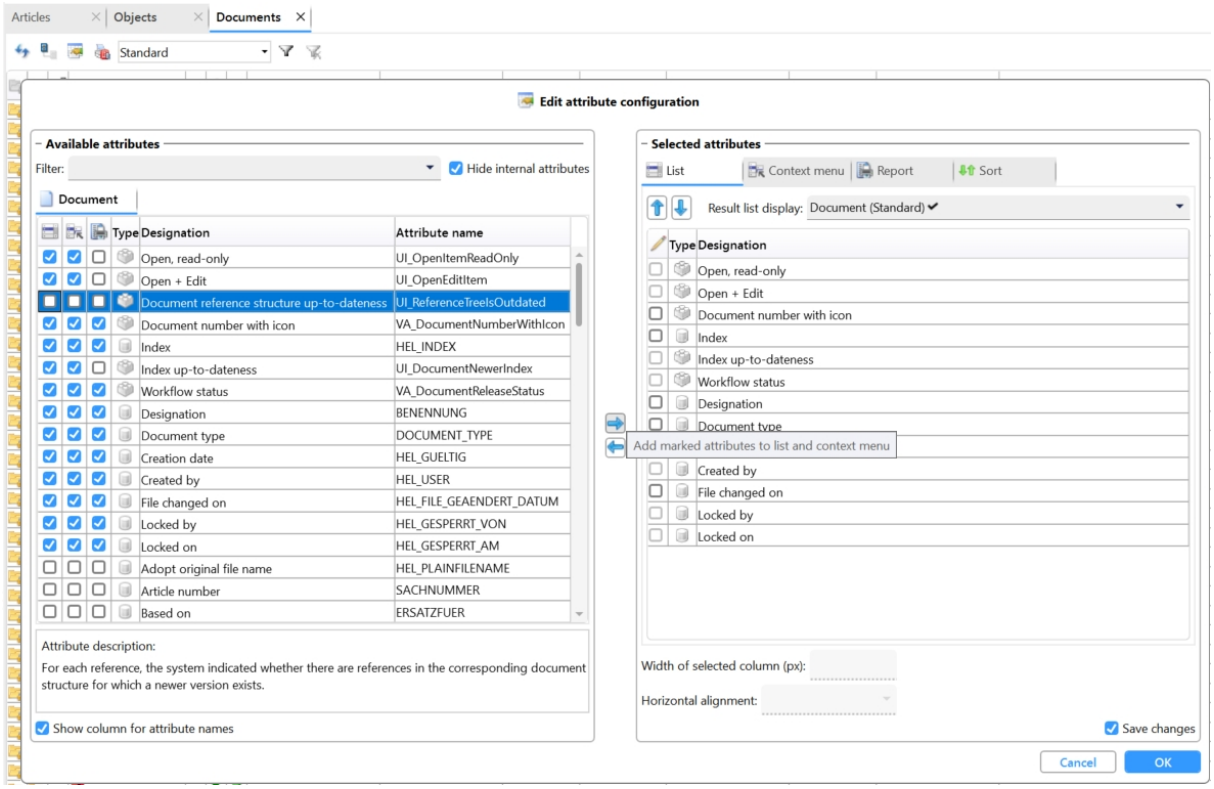
Document reference structure up-to-dateness (UI_ReferenceTreeIsOutdated) indicates for a document whether a newer version of the documents referenced by the document is available.

This means that the recursive structure of the file references is considered, regardless of the document index.

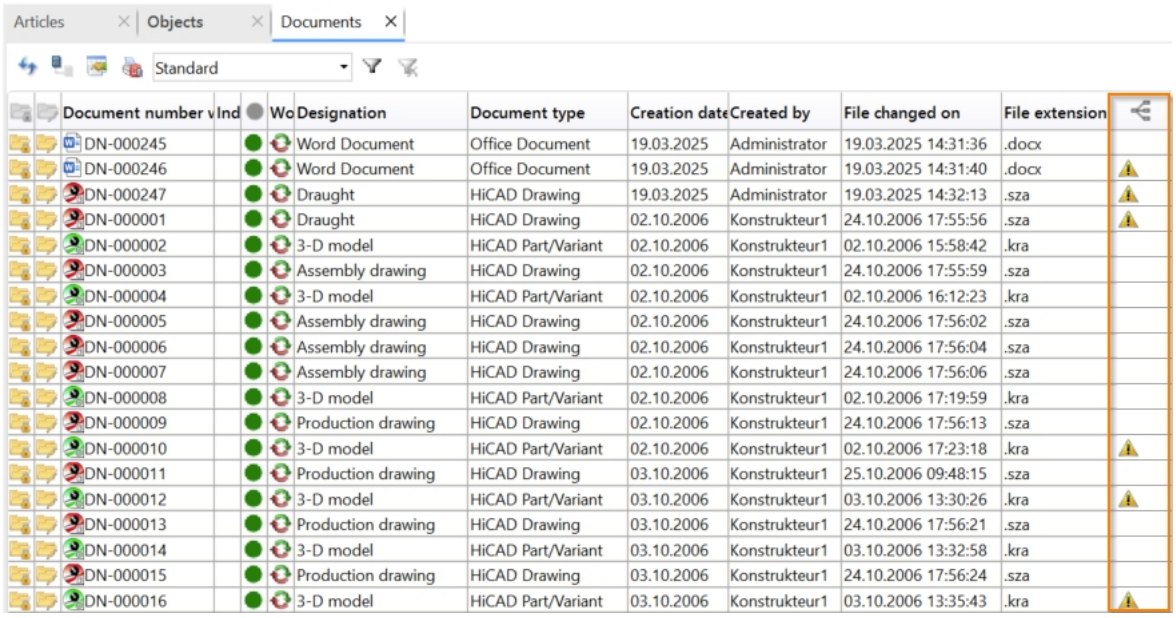
For HiCAD files, for example, this means that the file version (internal KRA version number) of the referenced document has changed since the referencing document was last saved.

When HELiOS is newly installed, the new attribute **Document reference structure up-to-dateness (UI_ReferenceTreeIsOutdated)** is shown by default.

After update installations, it is available in the attribute configuration for document result lists.



For current documents, the column entry remains empty. For outdated documents, a triangular warning symbol is displayed:

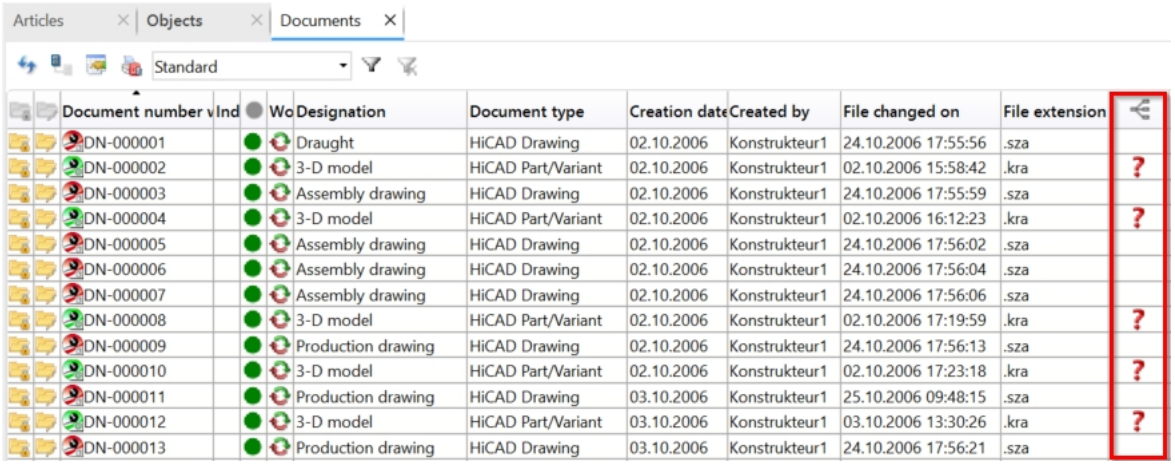


Articles | Objects | Documents

Standard

Document number v	Ind	Wo	Designation	Document type	Creation date	Created by	File changed on	File extension	
DN-000245			Word Document	Office Document	19.03.2025	Administrator	19.03.2025 14:31:36	.docx	
DN-000246			Word Document	Office Document	19.03.2025	Administrator	19.03.2025 14:31:40	.docx	⚠
DN-000247			Draught	HiCAD Drawing	19.03.2025	Administrator	19.03.2025 14:32:13	.sza	⚠
DN-000001			Draught	HiCAD Drawing	02.10.2006	Konstrukteur1	24.10.2006 17:55:56	.sza	⚠
DN-000002			3-D model	HiCAD Part/Variant	02.10.2006	Konstrukteur1	02.10.2006 15:58:42	.kra	
DN-000003			Assembly drawing	HiCAD Drawing	02.10.2006	Konstrukteur1	24.10.2006 17:55:59	.sza	
DN-000004			3-D model	HiCAD Part/Variant	02.10.2006	Konstrukteur1	02.10.2006 16:12:23	.kra	
DN-000005			Assembly drawing	HiCAD Drawing	02.10.2006	Konstrukteur1	24.10.2006 17:56:02	.sza	
DN-000006			Assembly drawing	HiCAD Drawing	02.10.2006	Konstrukteur1	24.10.2006 17:56:04	.sza	
DN-000007			Assembly drawing	HiCAD Drawing	02.10.2006	Konstrukteur1	24.10.2006 17:56:06	.sza	
DN-000008			3-D model	HiCAD Part/Variant	02.10.2006	Konstrukteur1	02.10.2006 17:19:59	.kra	
DN-000009			Production drawing	HiCAD Drawing	02.10.2006	Konstrukteur1	24.10.2006 17:56:13	.sza	
DN-000010			3-D model	HiCAD Part/Variant	02.10.2006	Konstrukteur1	02.10.2006 17:23:18	.kra	⚠
DN-000011			Production drawing	HiCAD Drawing	03.10.2006	Konstrukteur1	25.10.2006 09:48:15	.sza	
DN-000012			3-D model	HiCAD Part/Variant	03.10.2006	Konstrukteur1	03.10.2006 13:30:26	.kra	⚠
DN-000013			Production drawing	HiCAD Drawing	03.10.2006	Konstrukteur1	24.10.2006 17:56:21	.sza	
DN-000014			3-D model	HiCAD Part/Variant	03.10.2006	Konstrukteur1	03.10.2006 13:32:58	.kra	
DN-000015			Production drawing	HiCAD Drawing	03.10.2006	Konstrukteur1	24.10.2006 17:56:24	.sza	
DN-000016			3-D model	HiCAD Part/Variant	03.10.2006	Konstrukteur1	03.10.2006 13:35:43	.kra	⚠

If HELiOS cannot recognise a document structure, e.g. if the user has transferred a corresponding file to HELiOS using Drag & Drop or imported it into an existing document master, the reference up-to-dateness cannot be determined. In this case, a red question mark is displayed:

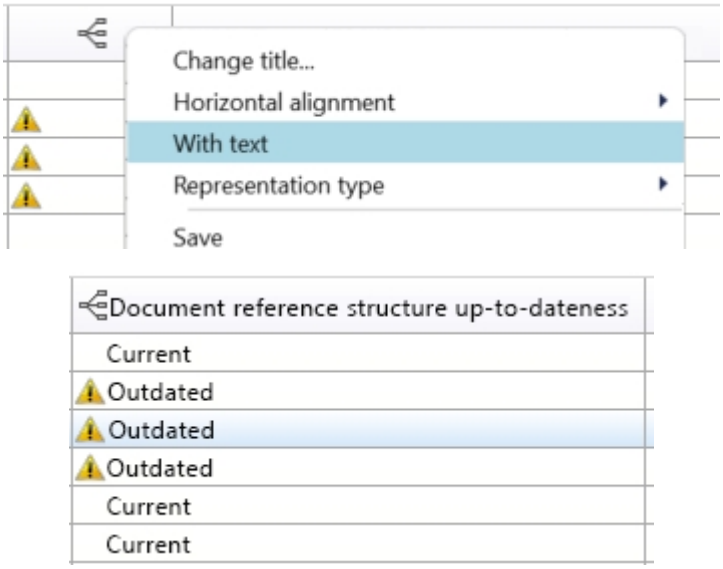


Articles | Objects | Documents

Standard

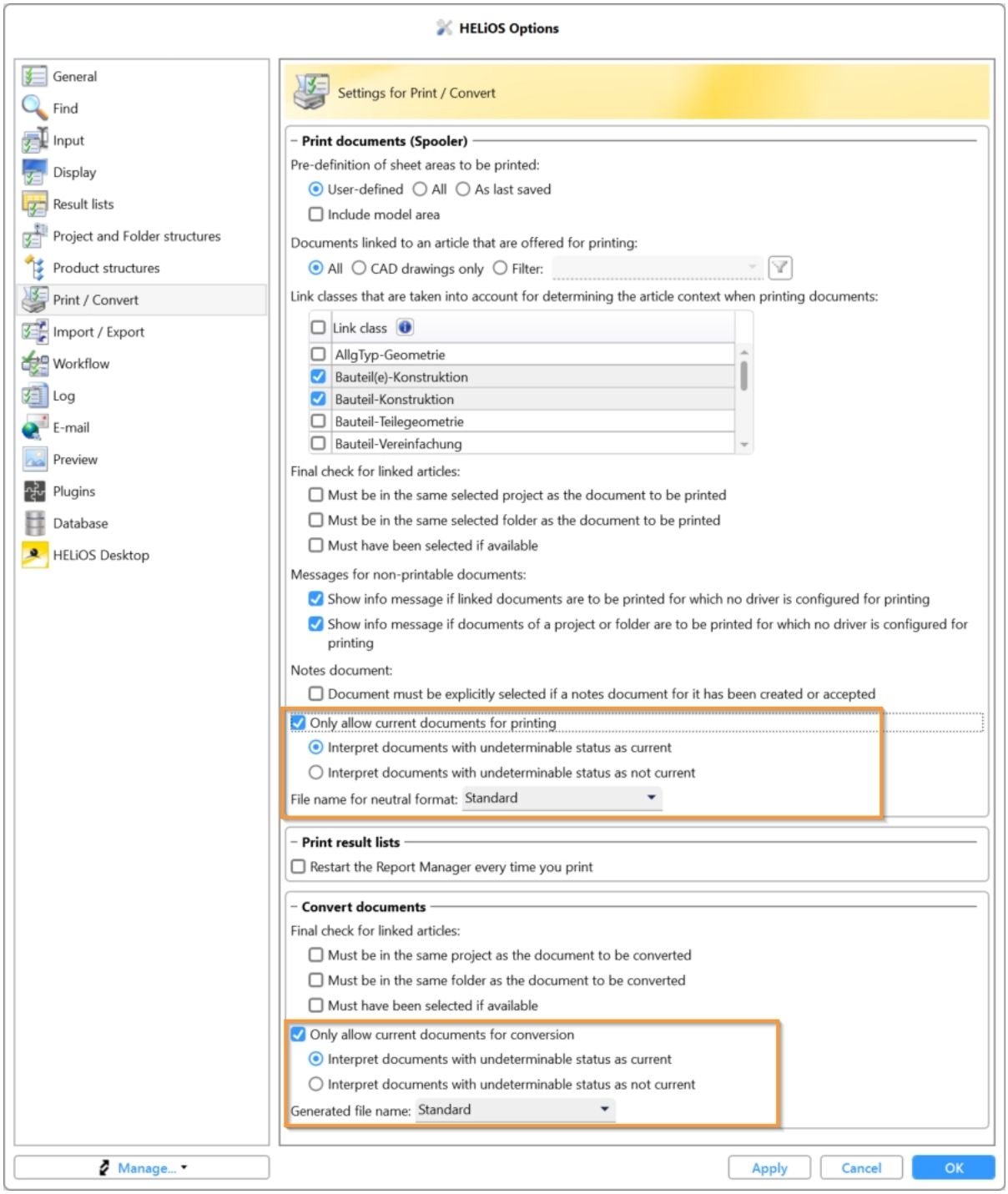
Document number v	Ind	Wo	Designation	Document type	Creation date	Created by	File changed on	File extension	
DN-000001			Draught	HiCAD Drawing	02.10.2006	Konstrukteur1	24.10.2006 17:55:56	.sza	
DN-000002			3-D model	HiCAD Part/Variant	02.10.2006	Konstrukteur1	02.10.2006 15:58:42	.kra	?
DN-000003			Assembly drawing	HiCAD Drawing	02.10.2006	Konstrukteur1	24.10.2006 17:55:59	.sza	
DN-000004			3-D model	HiCAD Part/Variant	02.10.2006	Konstrukteur1	02.10.2006 16:12:23	.kra	?
DN-000005			Assembly drawing	HiCAD Drawing	02.10.2006	Konstrukteur1	24.10.2006 17:56:02	.sza	
DN-000006			Assembly drawing	HiCAD Drawing	02.10.2006	Konstrukteur1	24.10.2006 17:56:04	.sza	
DN-000007			Assembly drawing	HiCAD Drawing	02.10.2006	Konstrukteur1	24.10.2006 17:56:06	.sza	
DN-000008			3-D model	HiCAD Part/Variant	02.10.2006	Konstrukteur1	02.10.2006 17:19:59	.kra	?
DN-000009			Production drawing	HiCAD Drawing	02.10.2006	Konstrukteur1	24.10.2006 17:56:13	.sza	
DN-000010			3-D model	HiCAD Part/Variant	02.10.2006	Konstrukteur1	02.10.2006 17:23:18	.kra	?
DN-000011			Production drawing	HiCAD Drawing	03.10.2006	Konstrukteur1	25.10.2006 09:48:15	.sza	
DN-000012			3-D model	HiCAD Part/Variant	03.10.2006	Konstrukteur1	03.10.2006 13:30:26	.kra	?
DN-000013			Production drawing	HiCAD Drawing	03.10.2006	Konstrukteur1	24.10.2006 17:56:21	.sza	

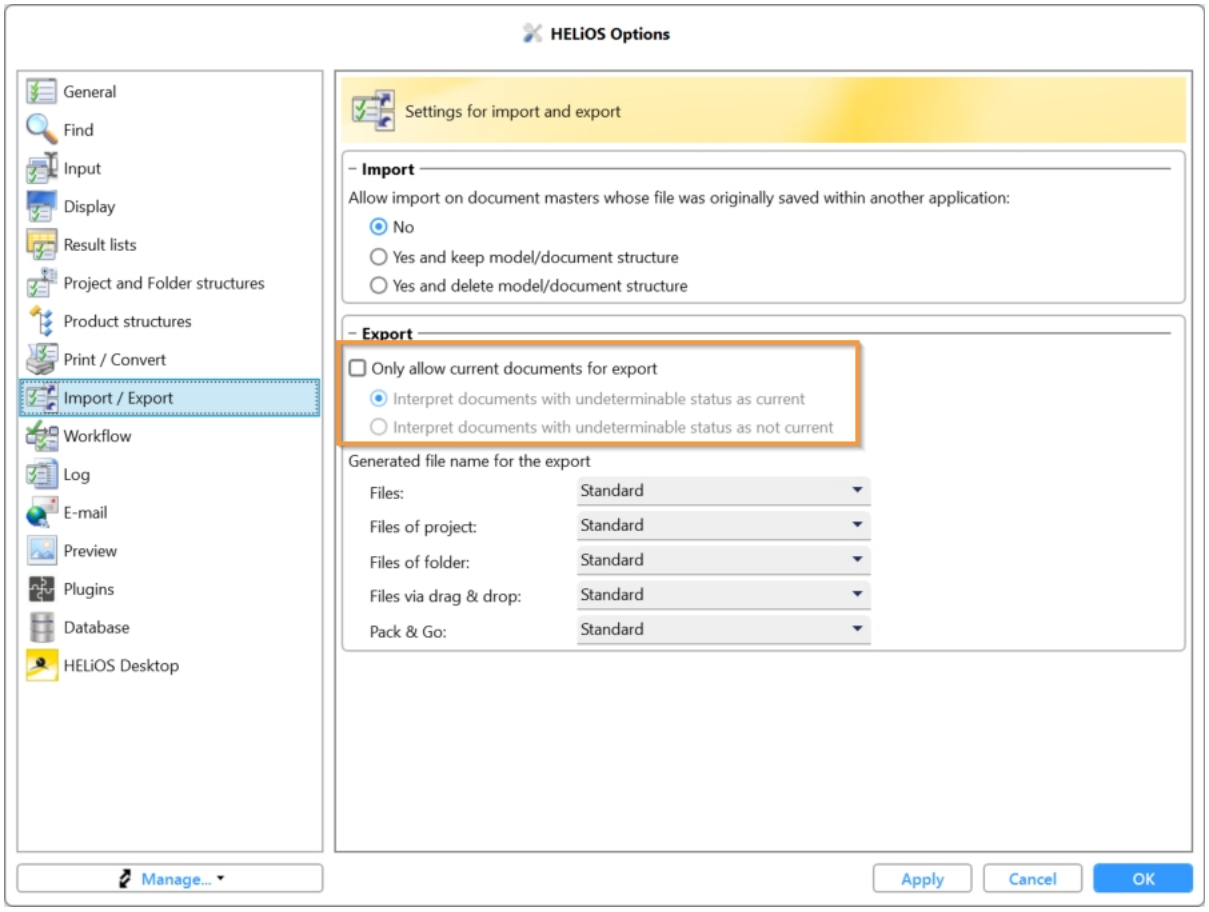
As with other result list columns, you can switch to a view with text that displays information about the icon symbols in the header and result list columns:

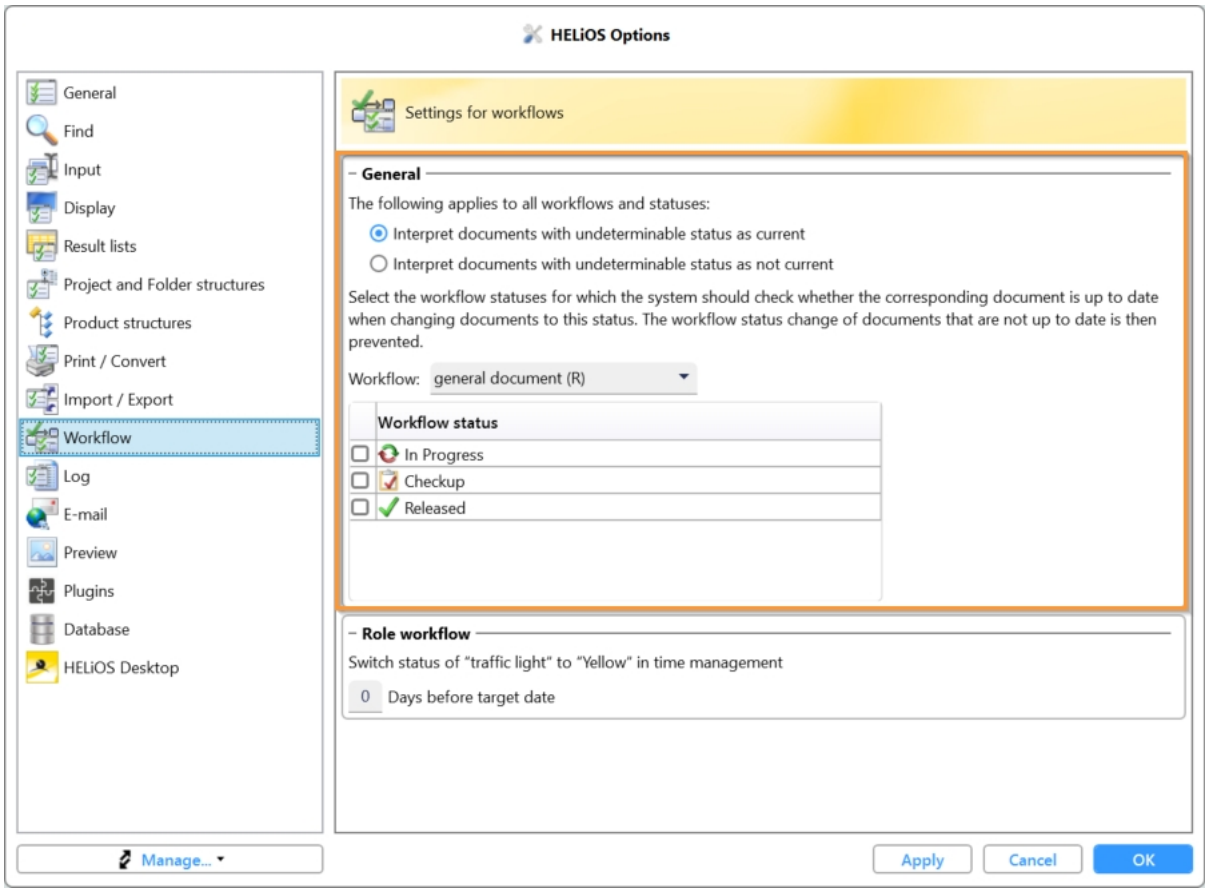


Checking outdated documents during printing, conversion and export, as well as when changing workflow status

In connection with the up-to-dateness of documents, the **HELiOS Options** for printing documents via the Spooler and conversions, for exporting documents from HELiOS and for changing workflow status offer you advanced options for setting how to proceed with documents that are not current or with a document currency status that is not up to date:



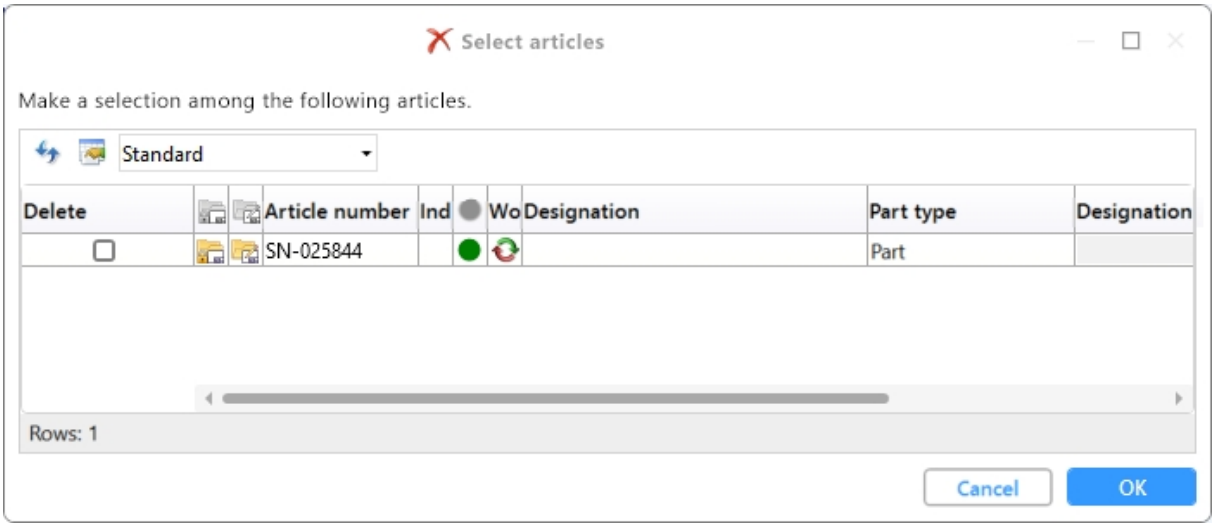

HELiOS Options
General
Find
Input
Display
Result lists
Project and Folder structures
Product structures
Print / Convert
Import / Export
Workflow
Log
E-mail
Preview
Plugins
Database
HELiOS Desktop
Settings for import and export
Import
Allow import on document masters whose file was originally saved within another application:
No
Yes and keep model/document structure
Yes and delete model/document structure
Export
Only allow current documents for export
Interpret documents with undeterminable status as current
Interpret documents with undeterminable status as not current
Generated file name for the export
Files:
Files of project:
Files of folder:
Files via drag & drop:
Pack & Go:
Standard
Manage...
Apply
Cancel
OK


HELiOS Options
General
Find
Input
Display
Result lists
Project and Folder structures
Product structures
Print / Convert
Import / Export
Workflow
Log
E-mail
Preview
Plugins
Database
HELiOS Desktop
Settings for workflows
General
The following applies to all workflows and statuses:
Interpret documents with undeterminable status as current
Interpret documents with undeterminable status as not current
Select the workflow statuses for which the system should check whether the corresponding document is up to date when changing documents to this status. The workflow status change of documents that are not up to date is then prevented.
Workflow:
general document (R)
Workflow status
In Progress
Checkup
Released
Role workflow
Switch status of "traffic light" to "Yellow" in time management
0
Days before target date
Manage...
Apply
Cancel
OK

Deleting referenced articles/documents in the model structure

If you attempt to delete CAD-relevant articles from referenced structures, you will receive a warning message:

The corresponding articles are initially deselected for deletion in the selection dialogue window that opens.



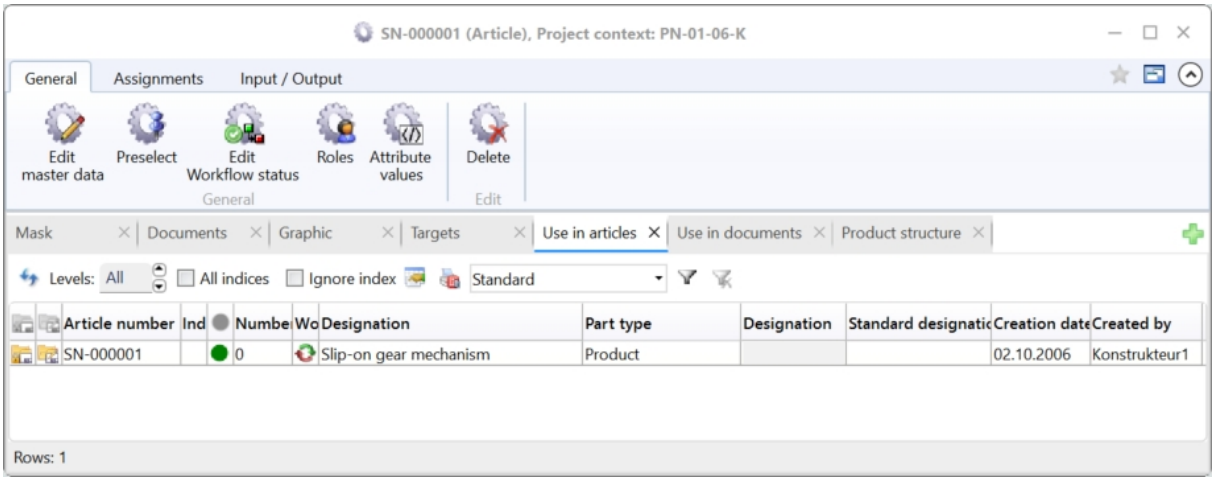
Use in articles, Use in documents

With the update to HELiOS 2026, you will find two different tabs for article use in the article detail dialogue:

- **Use in articles**

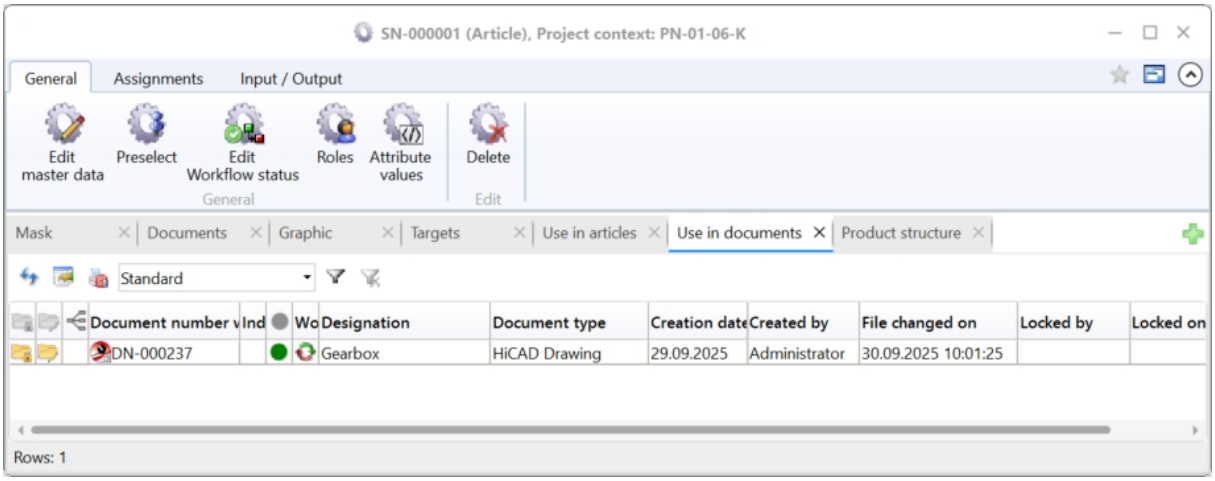
  This refers to a use based on the product structure.

  In earlier HELiOS versions, the tab was simply named "Use".



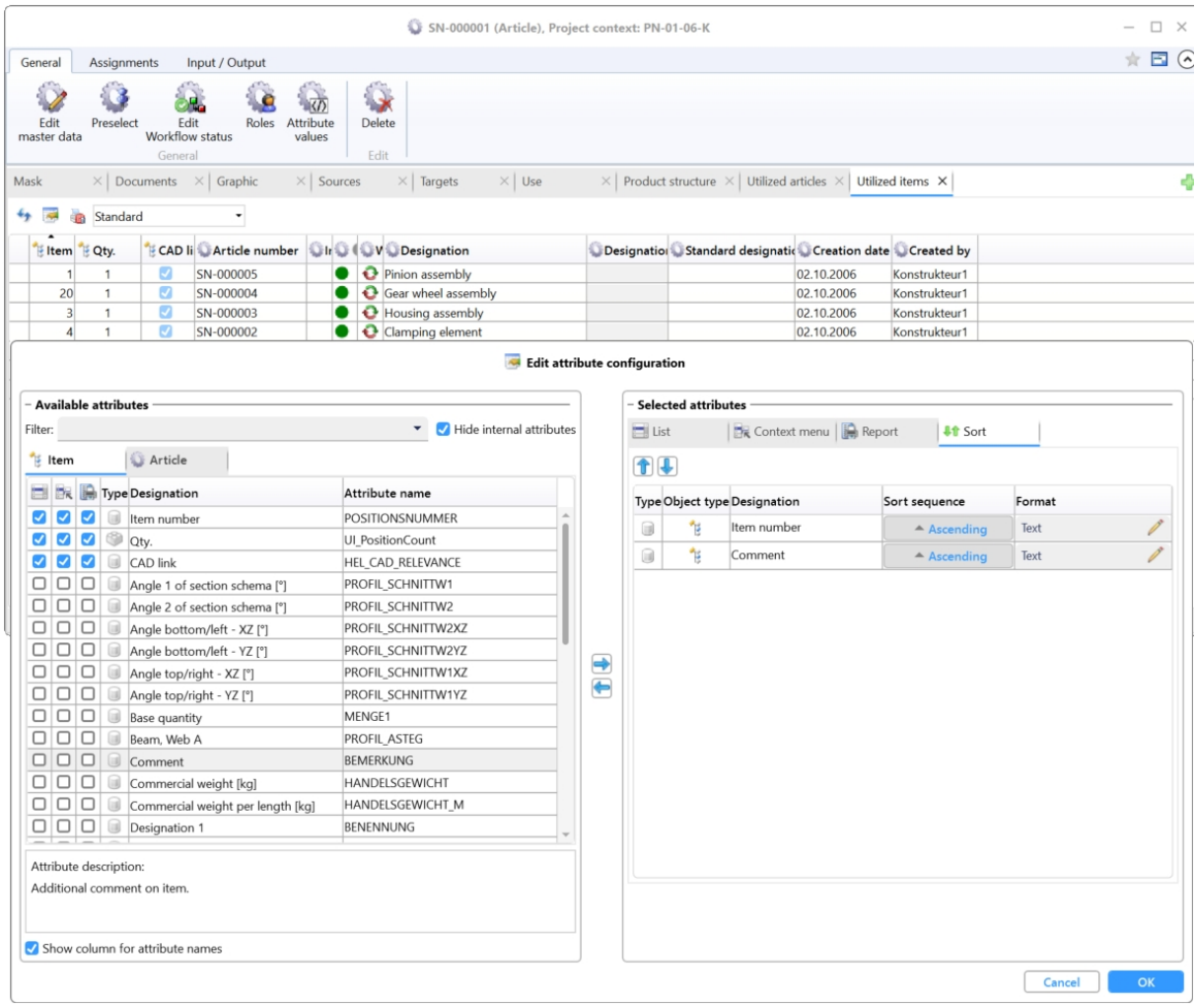
- **Use in documents**

  This new tab lists all documents in whose model structure the active article is stored.



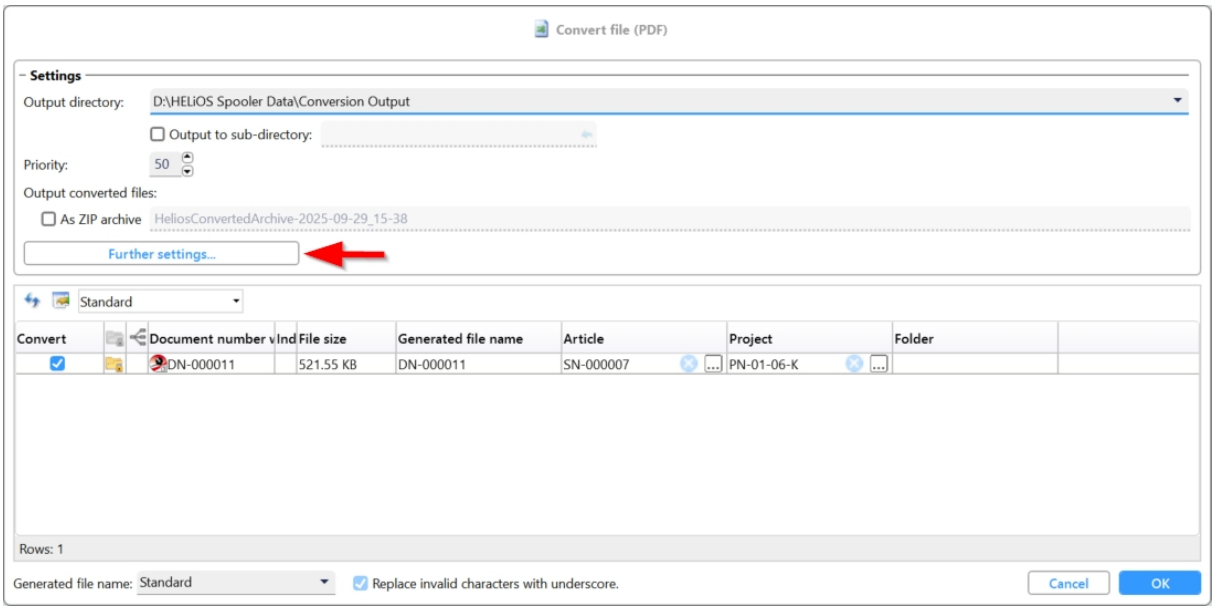
Sorting the "Utilized items" result list

The option introduced with HELiOS 2025 Service Pack 2 to define sorting criteria for result lists on the **Sort** tab is also available in the special product structure- and article context-related **Utilized items** result list.



Convert: Further settings

In the **Convert file** dialogue window for documents you can now find the new **Further settings...** button.



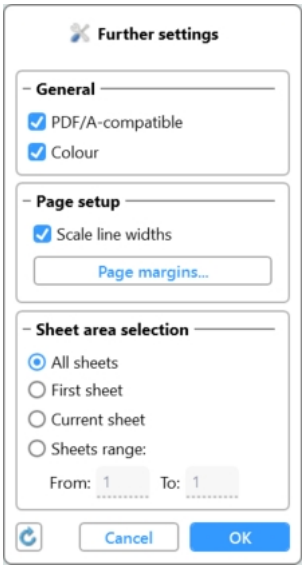
By clicking on this button, you can override the conversion options specified by the HELiOS Spooler for the active conversion process, if necessary.

The conversion to the following formats generally offers advanced settings:

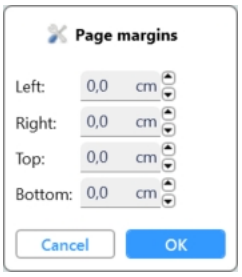
- PDF (from SZA, IDW or DWG files)
- STEP (from IPT or IAM format)
- Image formats(BMP, GIF, JPG, PNG and TIFF) from Inventor files (IDW, DWG, IPT and IAM)
- STL (from IPT or IAM files)

A target format-specific dialogue window opens with the Spooler options.

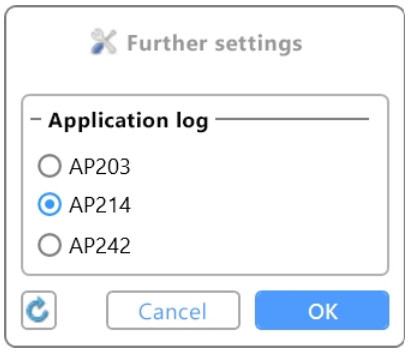
For PDF files, for example, the following options are available:



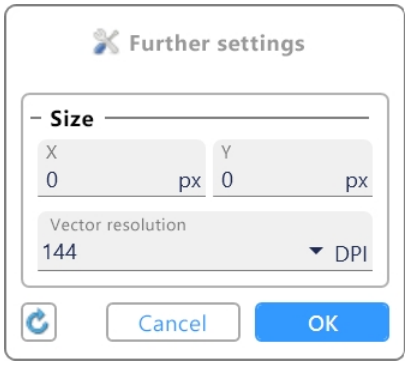
Clicking on **Page margins** opens a sub-dialogue box for changing the page margin dimensions



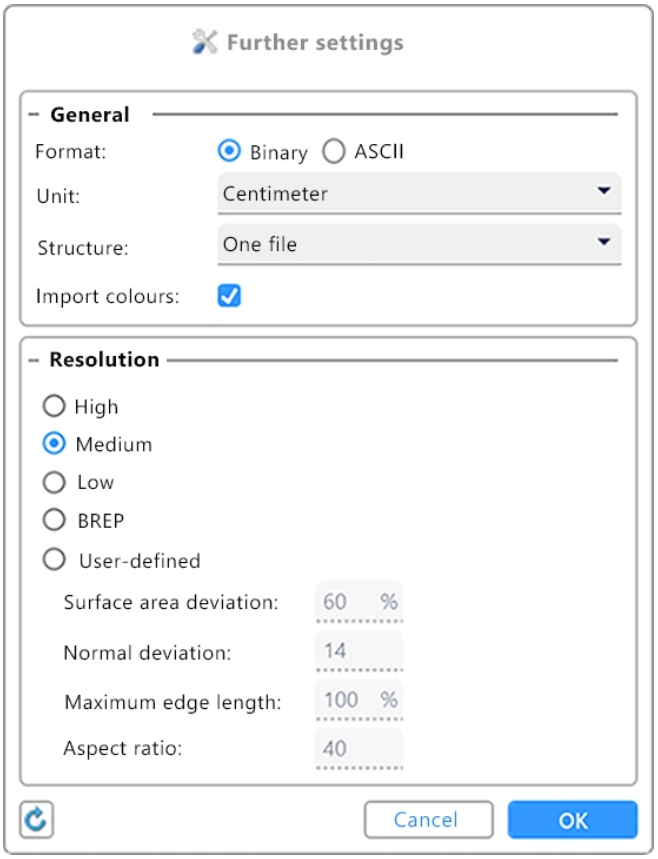
The following options are available for the STEP format:



The following options are available for image formats::



When converting to STL format, you have the following additional settings options:

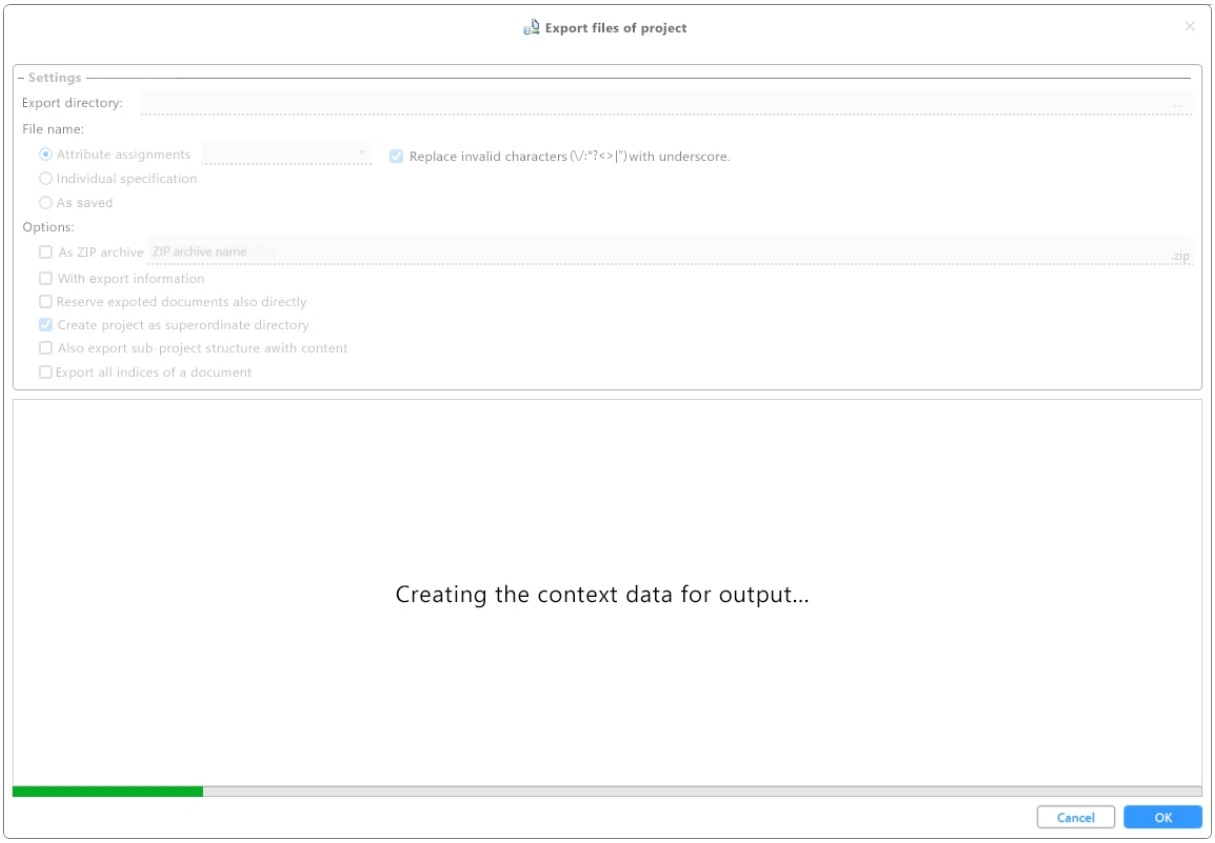


HELiOS remembers the changed settings and offers them again the next time you convert. Clicking the **Reset** button at the bottom left of the dialogue window restores the default settings specified by the server.

Export dialogue: Progress bar with context determination

In the export dialogue for HELiOS documents, the respective context (article, project, folder) is always determined in order to build up the result list.

You will see a progress bar while this process is running.

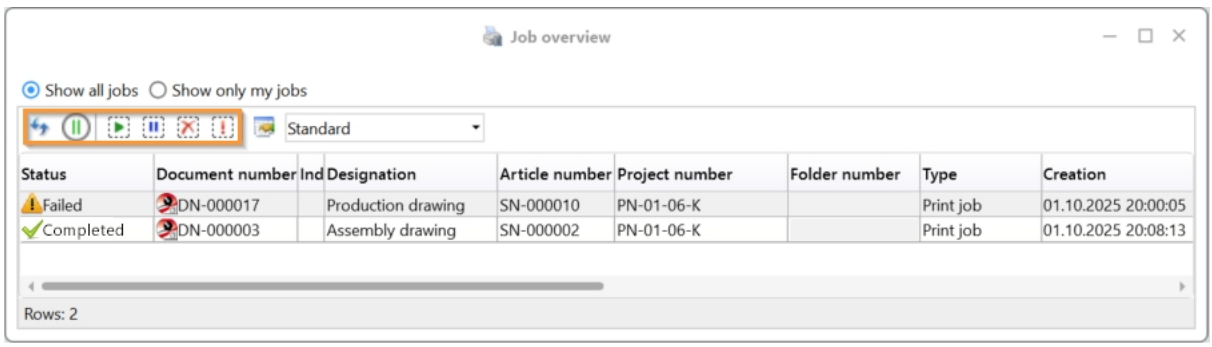


Job overwiew

Similar to the revised interface of the **HELiOS Spooler Admin Tool**, the **Job overview** of print/conversion jobs, which you can access in the HELiOS Desktop, has also been expanded:

There you will find corresponding buttons for controlling the jobs.

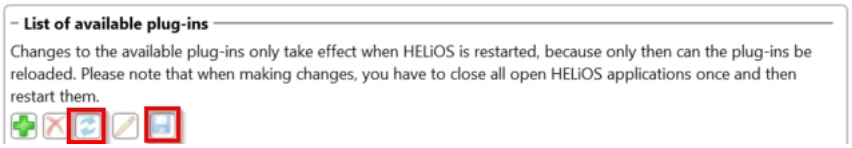
It is also possible to execute these for multiple job selections.



HELIOS Options: Plugins

Update and save selected plugins

At **HELIOS Options > Plugins**, two new edit buttons have been added for managing plugins:



By selecting a plugin in the list and clicking on **Update selected plugin** you can perform an update without replacing the plugin in the file system or by deleting and adding it again.

Here, too, you can decide in the Windows file selection dialogue at the bottom right whether you want to select only the plugin DLL or the entire ZIP archive of the plugin for updating.

This option now also appears when transferring plugins to HELiOS.

By selecting a plugin and clicking **Save selected plugin**, you can save a plugin to your local system (or to a network drive, for example). Multiple selection is not possible here.

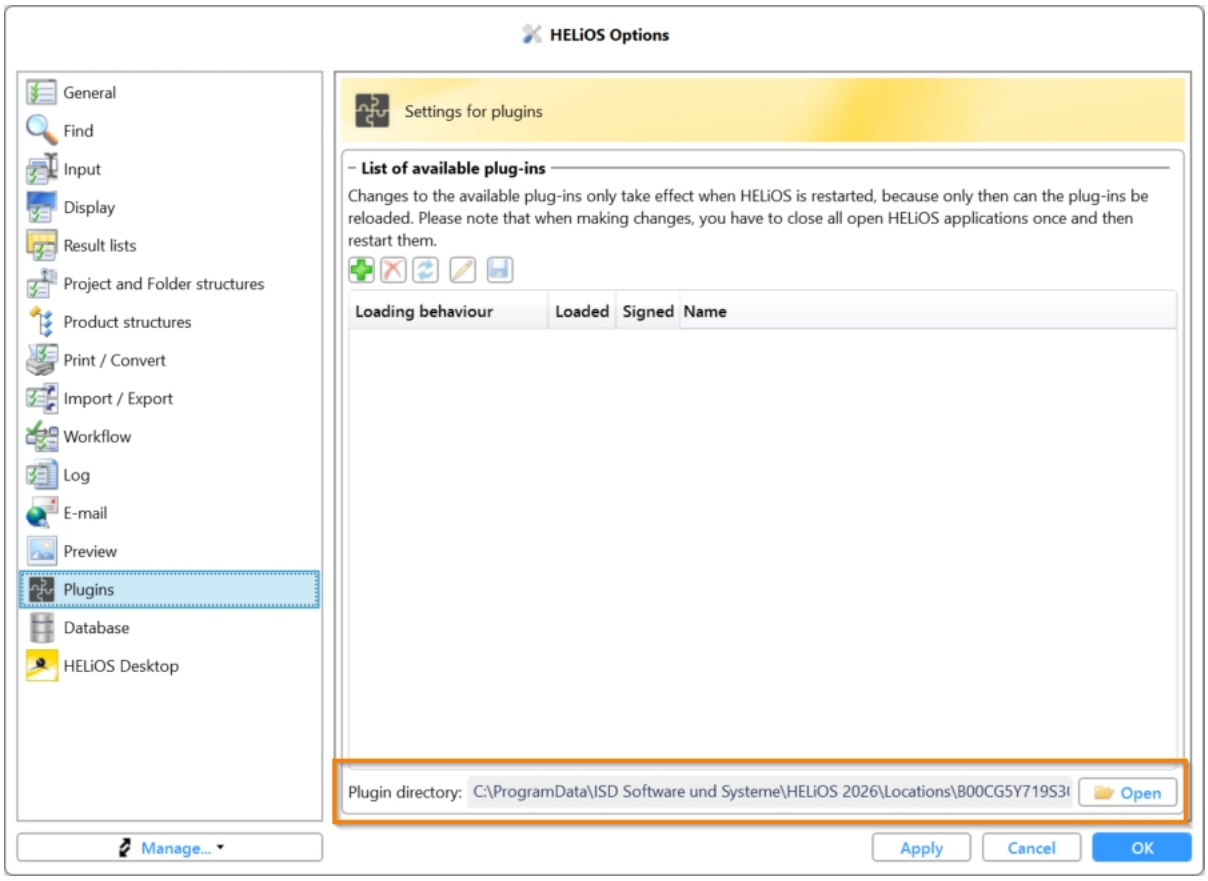
Saving then exports the selected plugin and all dependent files as a ZIP archive.

This provides you with a simple way to exchange plugins between different workstations.

Plugin directory

At the bottom of the Plugins options window, you will see the system path of your plugins integrated in HELiOS in the row next to **Plugin directory**.

Clicking on **Open** to the right of it will open it directly in Windows Explorer.



Performance improvements for viewing

In HELiOS 2025, preview displays and viewer integrations were revised and improved. With the update to HELiOS 2026, further performance optimisations were made in this area.

When previewing IFC files in HELiOS, a reduction in main memory requirements and thus an increase in viewer performance could be achieved.

A progress bar is only displayed for asynchronously started viewers – including the preview mechanisms for MS Office files, ZIP archive viewers, and all viewers based on WebView2 – if a corresponding delay justifies it. For very short loading times, the unnecessary, very brief appearance of a progress bar is avoided.

Report Manager

Discontinuation of the Report Manager Professional

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

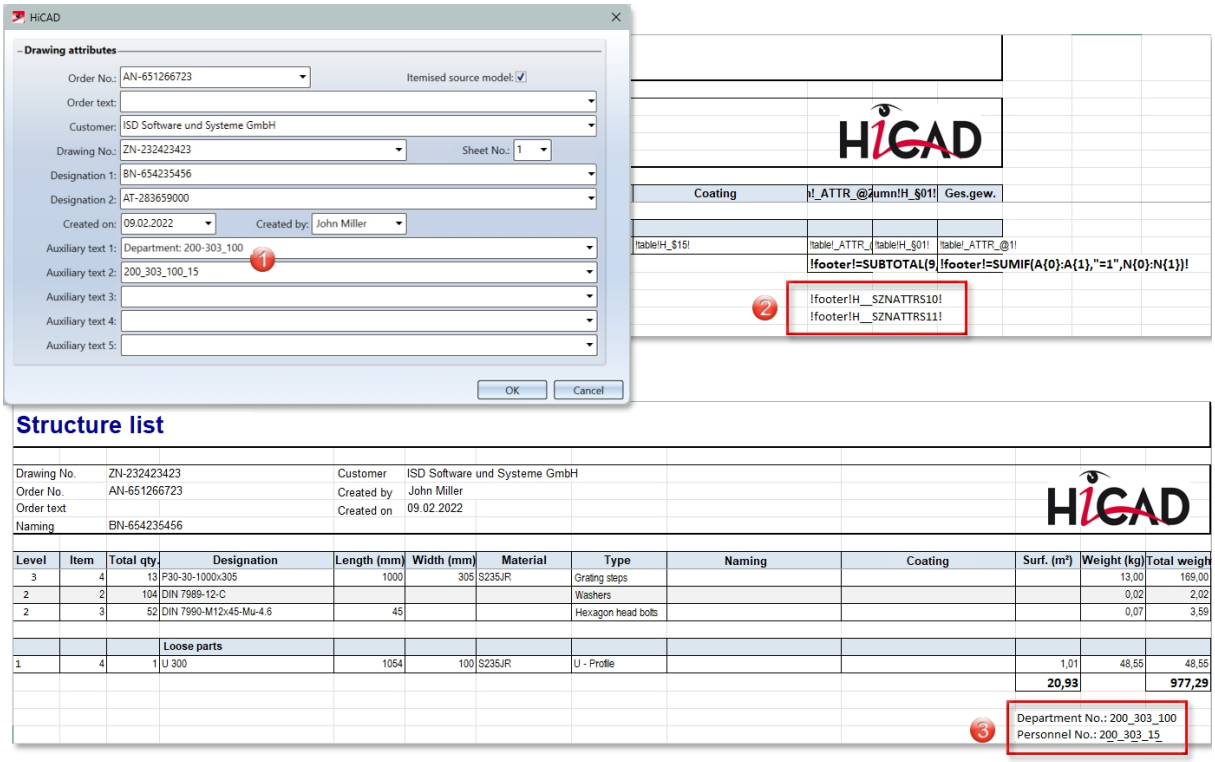
Discontinuation of the "old" Report Manager

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.

Service Pack 1

Drawing attributes in Excel BOMs for Steel Engineering

In HiCAD, drawings have so-called drawing attributes. You can now automatically transfer these attributes to the footer of an Excel bill of materials. To do this, you must add a placeholder (command) to the Excel template file for steel engineering bill of materials (HiCAD_Stahlbau.xlsx). These placeholders are then replaced during export from HiCAD. To write content in the footer, use the command **!footer!**, then enter the **Attribute** and end with another !, e.g.: **!footer!H__SZNATTRS10!.**

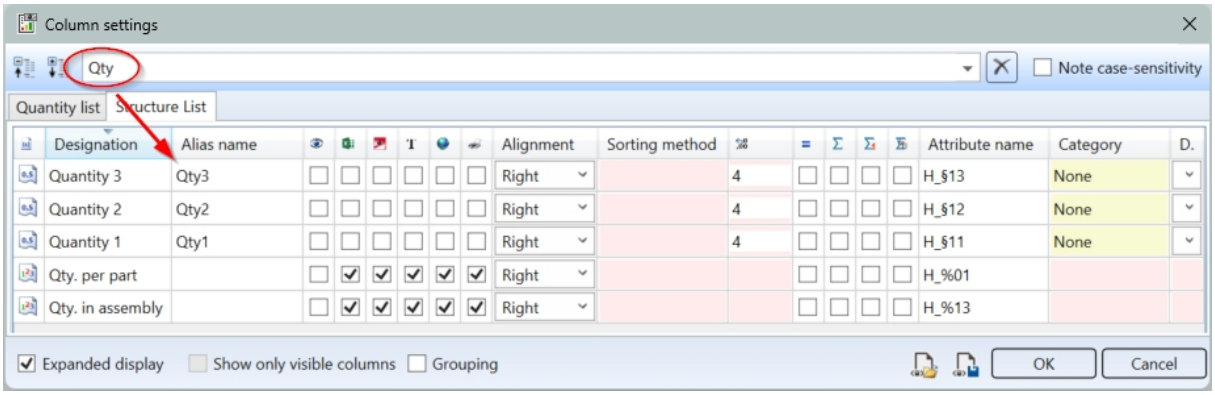


(1) Drawing attributes in HiCAD, (2) Addition in the configuration file HiCAD_Stahlbau.DE.30.0.xlsx, (3) Attributes in the bill of materials

Major Release

Search by alias name

In the **Column settings** of the Report Manager, you can search for attributes. The attribute name and description were taken into account. Starting with HiCAD 2026, you can also search for the alias name for the attributes.



Fixed length for Bar - Summary

In practice, beams and profiles with a fixed length and cutting angle (e.g. angle profile with a fixed length of 300 mm and a cutting angle of 45 degrees) are often ordered. In the **Bar - Summary** list, all beams and profiles with the same fixed length were previously summarised without taking the cutting angle into account. This meant that distinguishing features for ordering were lost. From HiCAD 2026 onwards, the cutting angle will also be taken into account when summarising beams and profiles in addition to the fixed length.

BOM-relevance of auxiliary and environment parts

Auxiliary and surrounding parts are often included in the drawing, but should not normally appear in BOMs.

If the BOM-relevance of already itemised parts is changed retrospectively, this can lead to inconsistencies in the item numbers and texts.

For this reason, from HiCAD 2026 onwards, the procedure of creating auxiliary and surrounding parts outside the main assembly is supported. The following changes have been made for this purpose:

In the **Itemisation with options** dialogue window, the **Only within main assembly** option has been added to the **Numbering** section of the **General** tab.

The **Only consider parts within the main assembly** checkbox has been added to the **General** section of the **Bill of materials** dialogue window.

Two default settings have been adjusted in the Configuration Editor:

- The referencing setting for the **BOM-relevant** attribute at **System settings > Attribute management > Attributes** has been changed from "Do not transfer" to **Standard behaviour**.
- At **Modelling > Change part structure**, the Move parts out of main assembly checkbox is now enabled by default for all industries. Previously, this was only the case for Steel Engineering.

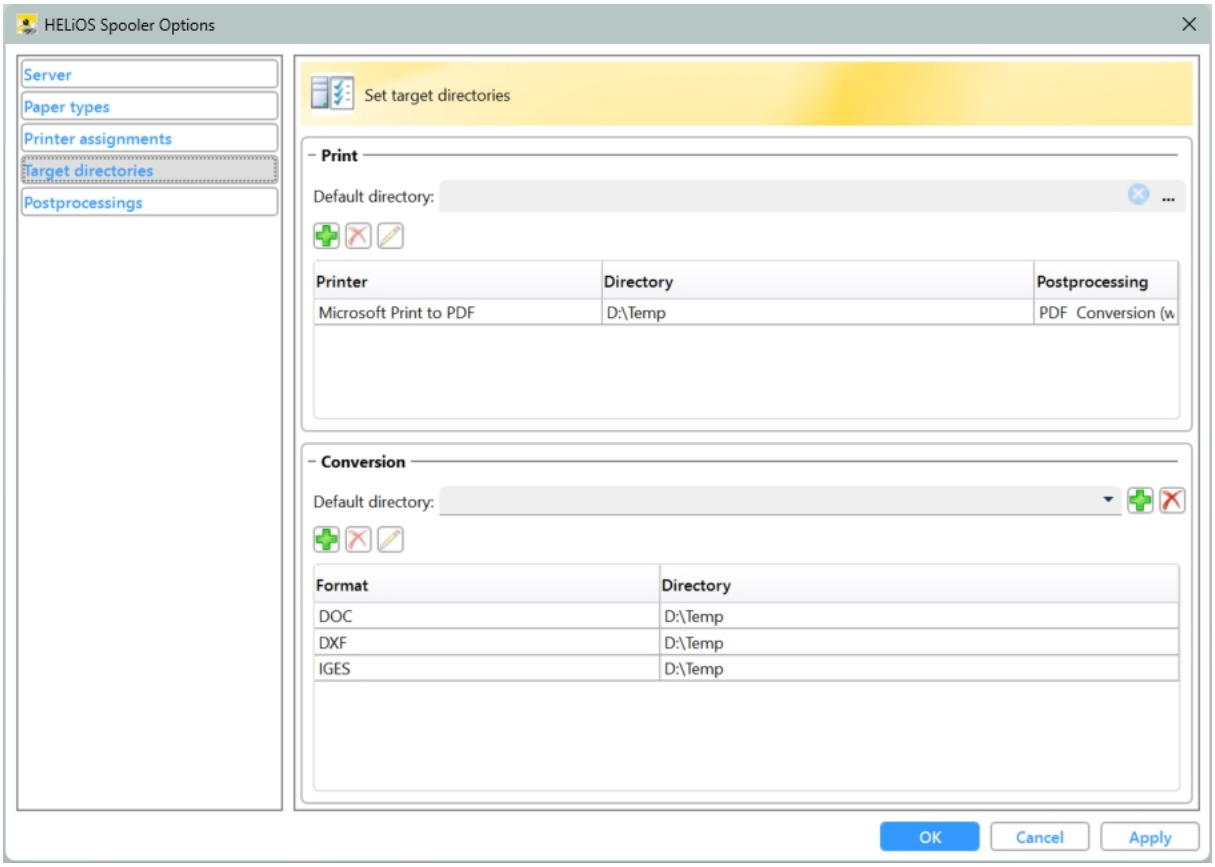
HELiOS Spooler

Service Pack 1

Further target directories for conversions

Individual (customer-specific) conversions can be defined in the add-ins for applications linked to HELiOS (such as HiCAD or Autodesk Inventor).

With the update to Service Pack 1 of HELiOS 2026, these can also be selected and edited in the **HELiOS Spooler Admin Tool** at **Target directories**.



Checking version compatibility and database connection

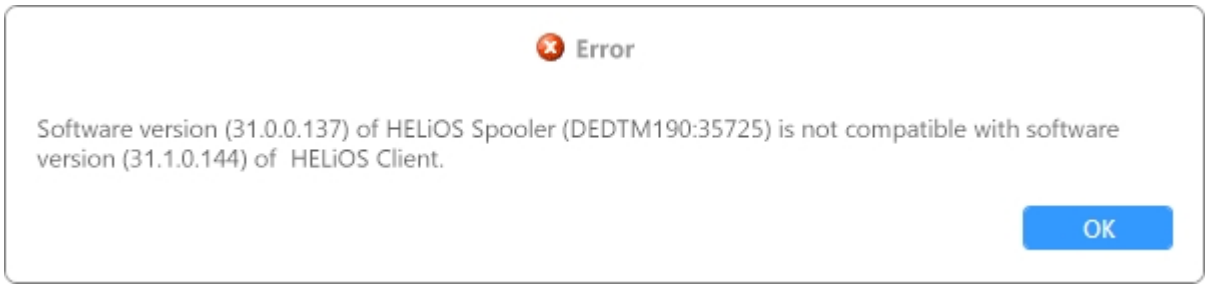
To prevent misconfigurations when operating the HELiOS Spooler, additional consistency tests have been inserted when calling up the Spooler.

This includes a **check of version compatibility**.

The HELiOS Spooler and HELiOS Client must be operated with the same product version (exact Major Release/Service Pack).

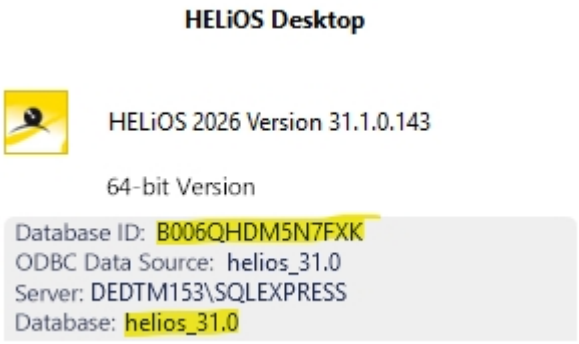
The reason for this is that both “sides” also work with the same database and the database version can change with each Service Pack.

If the versions do not match, an error message such as the following appears when the Spooler is called:

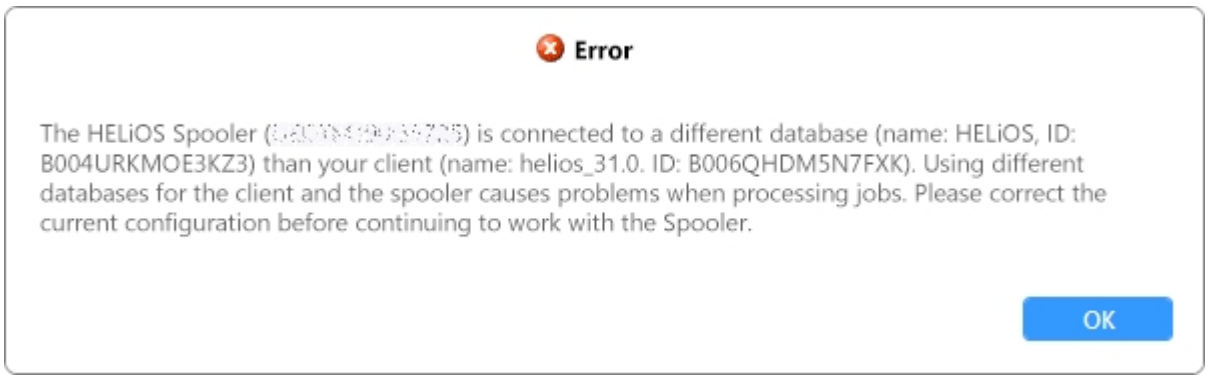


A **database connection check** is then also performed, as the Spooler can only work in conjunction with the client if both are connected to the same database.

Both the database name and the database ID are included in the equality check. Here is an example from the corresponding display in HELiOS Desktop:



If the information does not match, the Client returns the following error message:



Additional consistency checks at start

When starting, the Spooler checks various settings, such as configuration files, target directories, write permissions, or registry entries.

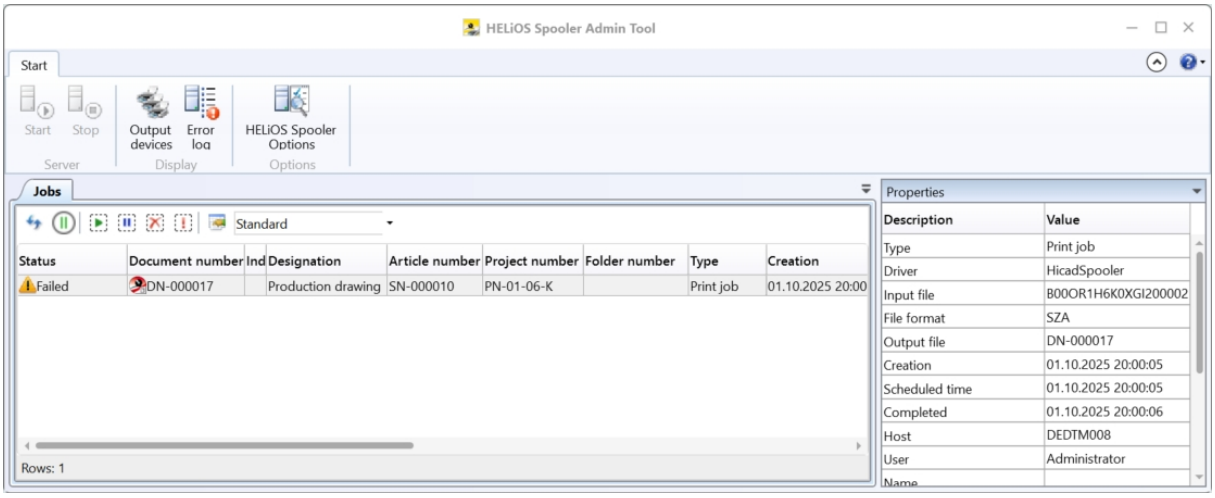
If inconsistencies are found, it may be terminated immediately.

Error messages are written to the corresponding log file.

Major Release

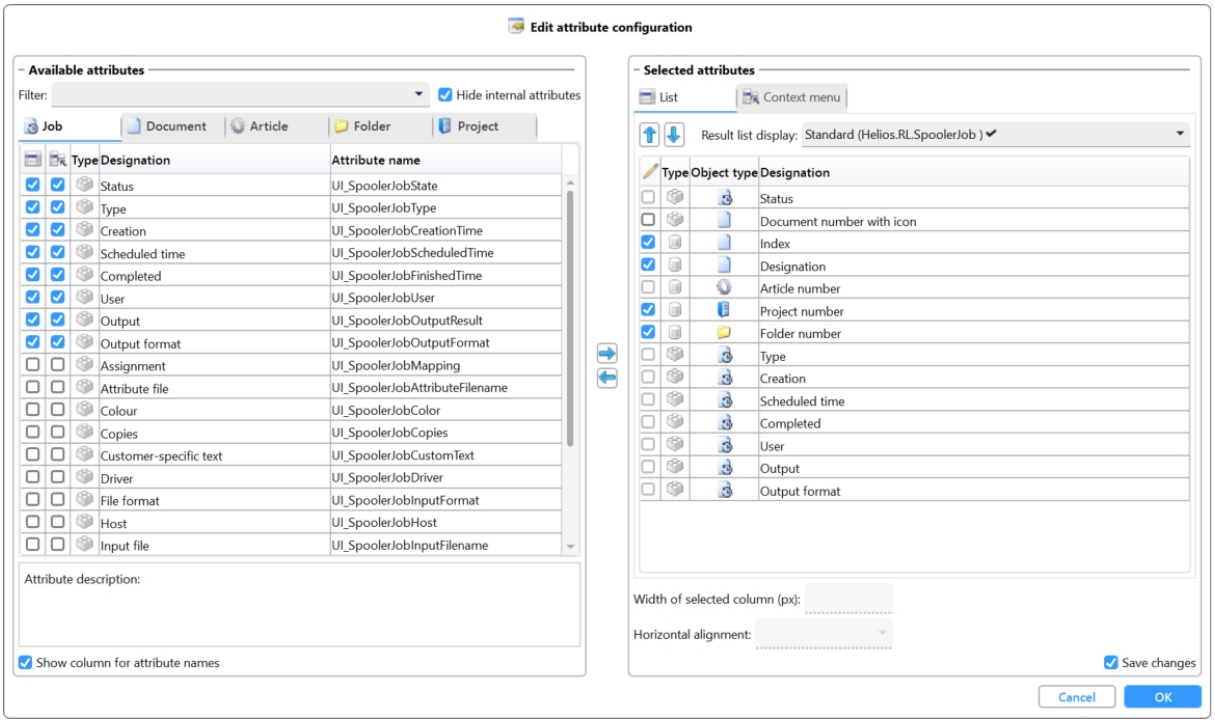
HELiOS Spooler Admin Tool

With the update to HELiOS 2026, you will find the **HELiOS Spooler Admin Tool** in a revised form.

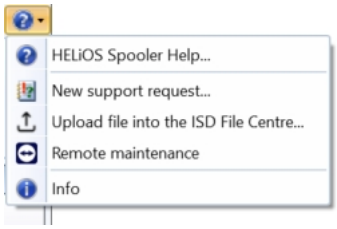


The new user interface provides you with a **Properties** window that can be docked in various positions, similar to the Explorer areas of the HELiOS Desktop.

In the **HELiOS Spooler Admin Tool**, you can also use the full range of result list configuration options, where you will find attributes specifically for print jobs on the **Job** tab.



The new Ribbon bar in the Admin Tool also allows you to start support requests or remote maintenance sessions, as well as upload files to the ISD File Centre:



Improvements to the priority processing of print and conversion jobs

For conversion jobs sent by clients running older versions of HELiOS to a current version of the HELiOS Spooler, inconsistencies could occur in the processing of a job's priority, which can generally be set by the user.

These have been fixed with the update to HELiOS 2026.

HELiOS MS Office Interface

Major Release

Support of Office 2024

The current versions of HELiOS and the HELiOS Spooler support MS Office 2024.

HELiOS CAD/CAE Integrations

Major Release

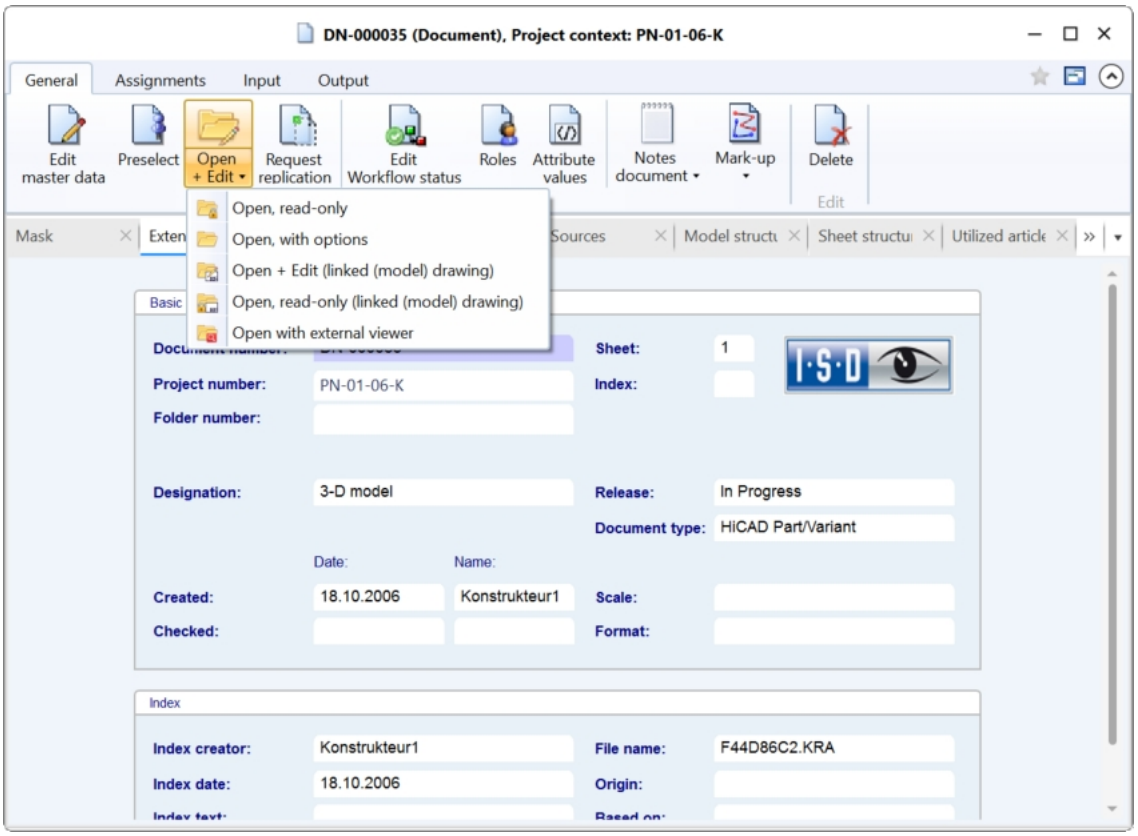
Opening linked drawings from HELiOS

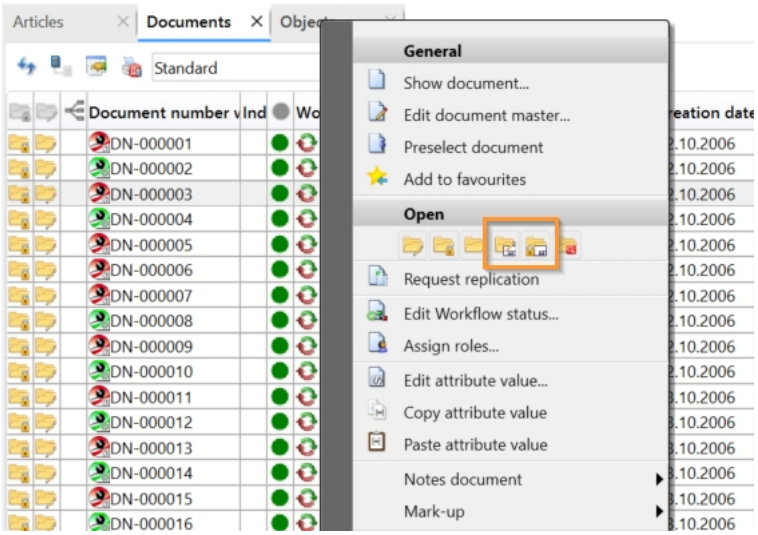
In several places in HELiOS, you will now find standardised buttons for opening drawings in their corresponding application:

Open, read only (linked (model) drawing)

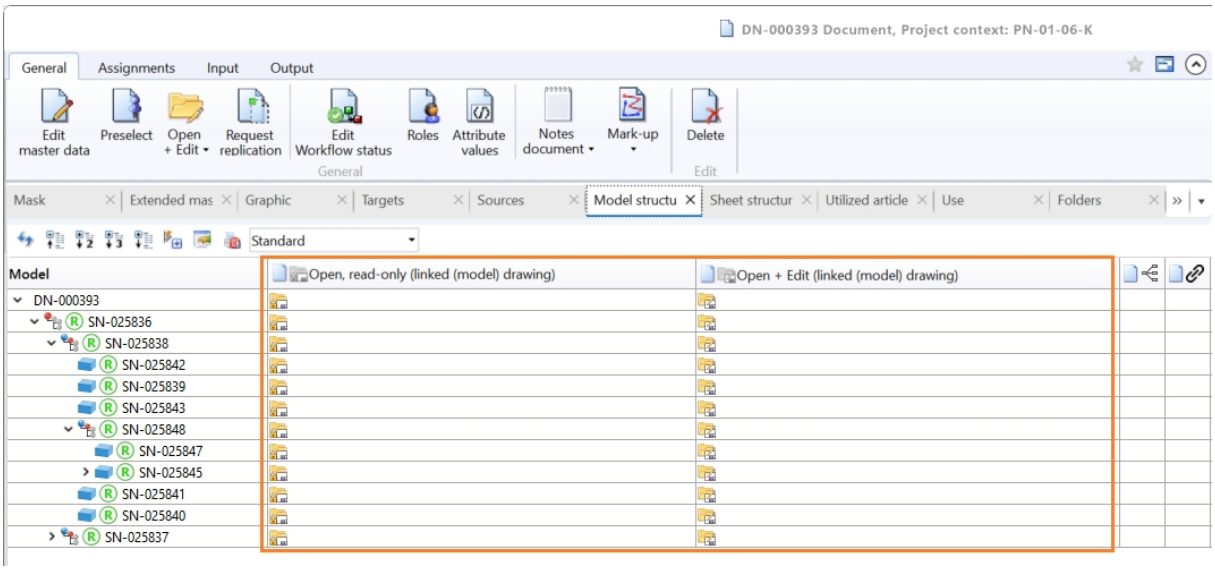
Open+Edit (linked (model) drawing)

You will find these buttons for an active document in the **General** tab of the document master data ribbon and, of course, in the context menu for documents:

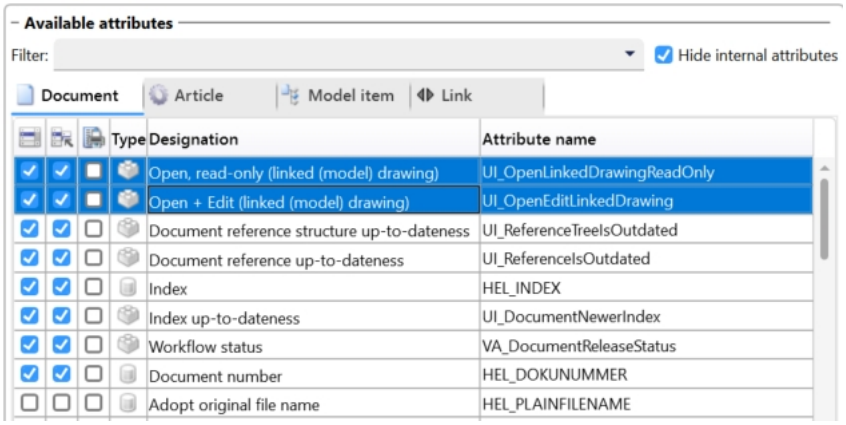


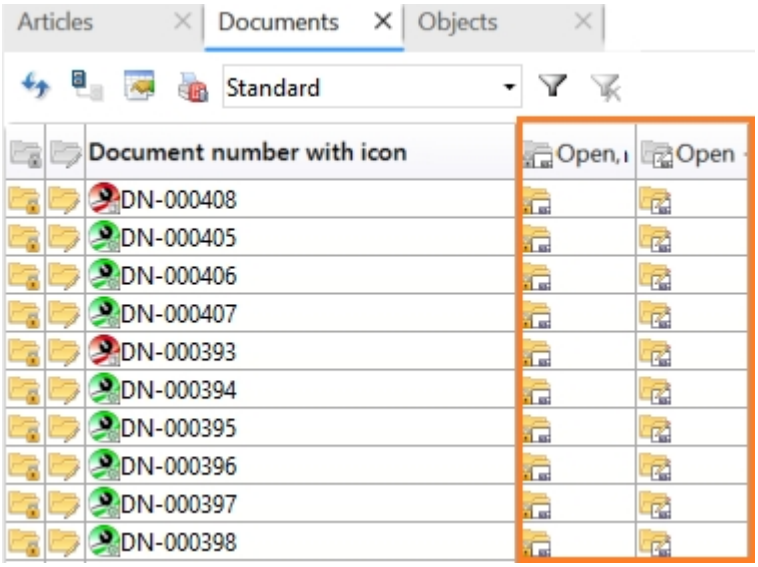


In the **Model structure** tab of document detail views, for example, they are also shown in the result list by default:



You can add document, article, combined result lists or object result list to the result list configuration by activating the UI attributes **UI_OpenLinkedDrawingReadOnly** or **UI_OpenEditLinkedDrawing.**



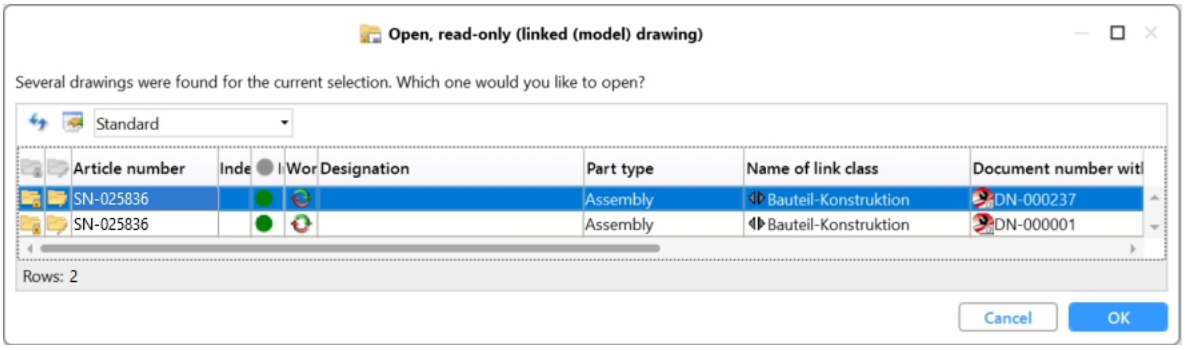


The call is also possible for multiple selections.

The relevant drawings are then determined via the HELiOS link model. The system links configured for the respective system (HiCAD, Inventor, AutoCAD, EPLAN) are taken into account.

Depending on where in HELiOS the call was made (document, article, combination list), the document/document or article/document links are used, with which drawings are linked by default.

If more than one possible drawing is found, a query dialogue box appears in which you can select the specific drawing to be opened.



Here, too, multiple selections are possible . In this case, all selected drawings (e.g. in HiCAD) are opened.

In the default HELiOS delivery, the buttons are shown in the following locations by default:

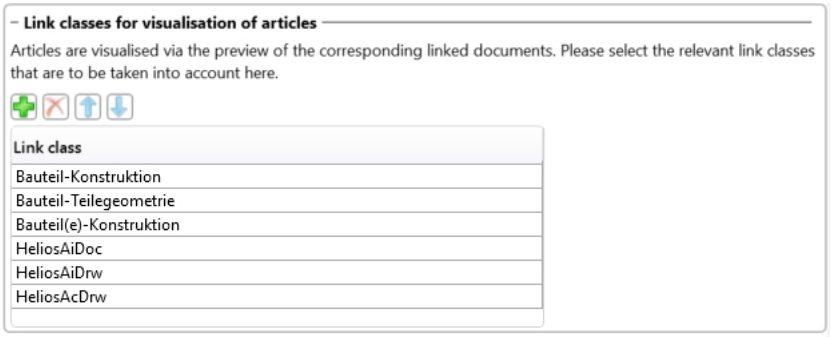
Articles result list, **Model structure** result list for HiCAD, **Use** in article master data, **Utilized articles**, **Utilized items**.

For update installations, they may need to be added via the corresponding result list configurations.

Link classes for visualising articles

In previous HELiOS versions, the settings for **Link classes for visualisation of articles** were located at **HELiOS Options > Database**, distributed across the respective CAD systems in the **HiCAD**, **AutoCAD** or **Inventor** submenu windows.

With the update to HELiOS 2026, you will find the new menu area Link classes for visualising articles in the **HELiOS Options** on the **Preview** tab, where these can now be configured more centrally.



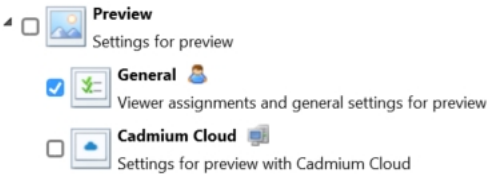
During an update installation, the corresponding link classes are entered by default, similar to the behaviour of new installations. However, in this case, the previous database attributes are not automatically migrated.

The configuration entries in the **Database** options are therefore no longer necessary.

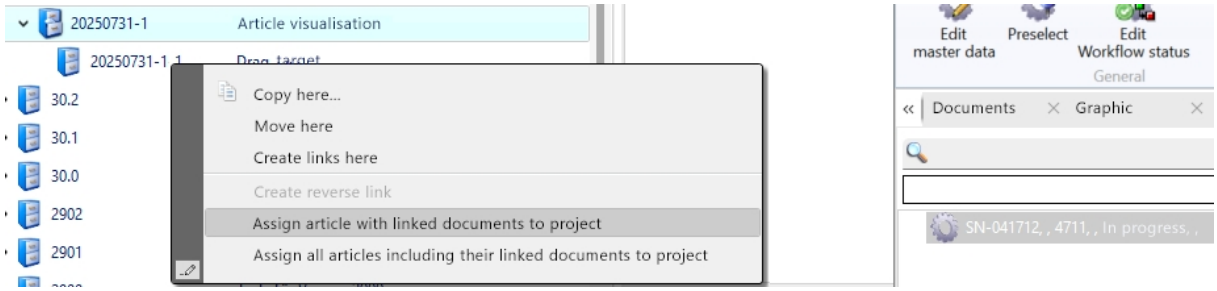
This change offers several advantages:

- The configuration is independent of a specific, linked (CAD) system and can therefore be configured across systems.

  For general links, e.g. to neutral formats, there is now also a systematic location, especially if several systems are used simultaneously.
- Any number of link classes can be configured.
- The order in which the linked documents are displayed can now be controlled transparently.
- The settings are saved user-specifically and can therefore also be 'distributed' via the export and import mechanism of interface settings (by selecting **Preview > General**).



When dragging and dropping products onto projects or folders while holding down the right mouse button, you can decide whether the linked documents should also be assigned:



All link classes are now taken into account (in earlier HELiOS versions, only visualisation links were taken into account).

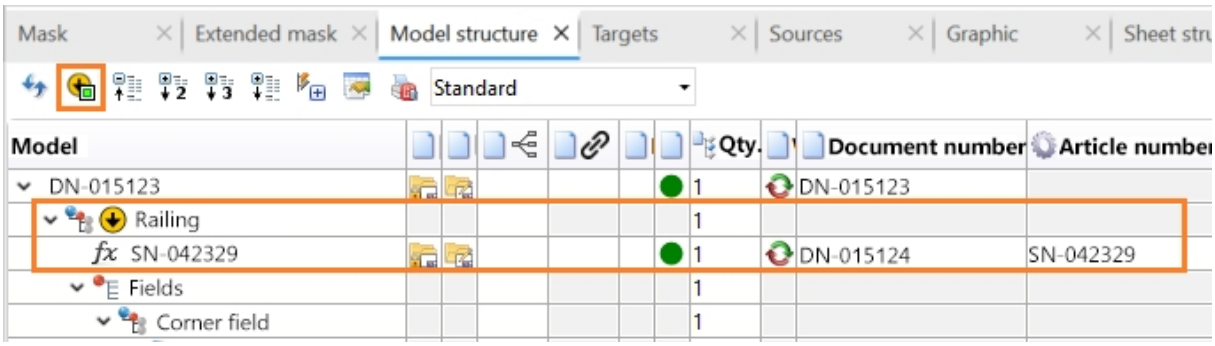
HELiOS in HiCAD

Service Pack 1

Model structure: Display base parts

In the button bar at the top of the **Model structure** (in document detail windows of HiCAD files), you can use **Do not display base parts** / **Display base parts** to control whether the base parts of dependent parts are shown in the model structure or not.

The result (when the base part is shown) looks something like this:



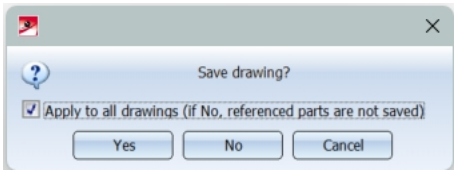
The dependencies from the HiCAD feature (in this example, the base part of the dependent part) are marked with the **fx** icon (for parametric) so that corresponding entries can be distinguished from the regular part structure of the document.

Please note that only the referenced document with its article context (if available) is displayed, not the entire structure of the base part (which has its own model structure).

The **Model** column is displayed analogous to the occurrences.

Save option when closing all drawings also available for HELiOS drawings

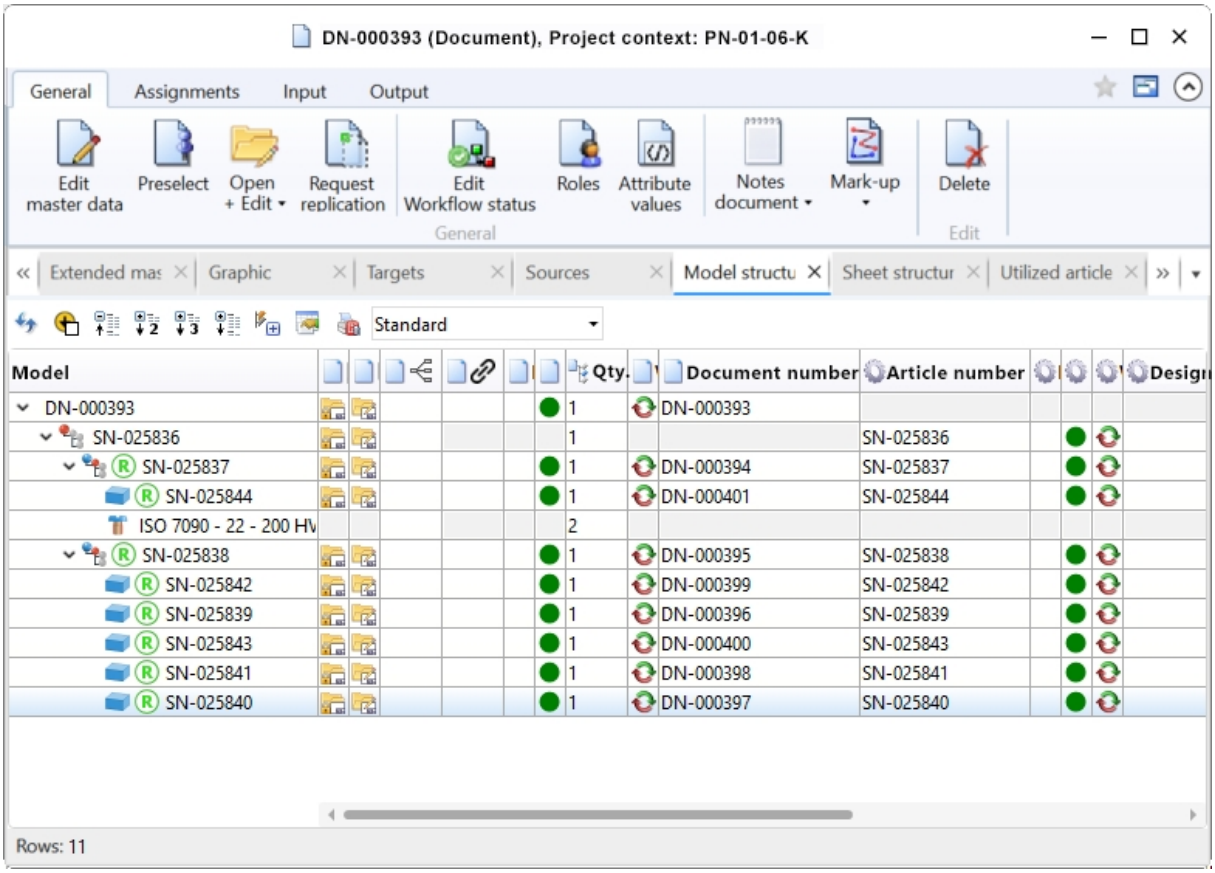
When closing HiCAD drawings by calling up the function **Drawing> Save/Print > Close** > **Close all drawings** , you can now also use the **Apply to all drawings...** checkbox in the **Save drawing** query if some of the open drawings are saved via HELiOS.



Major Release

Model structure

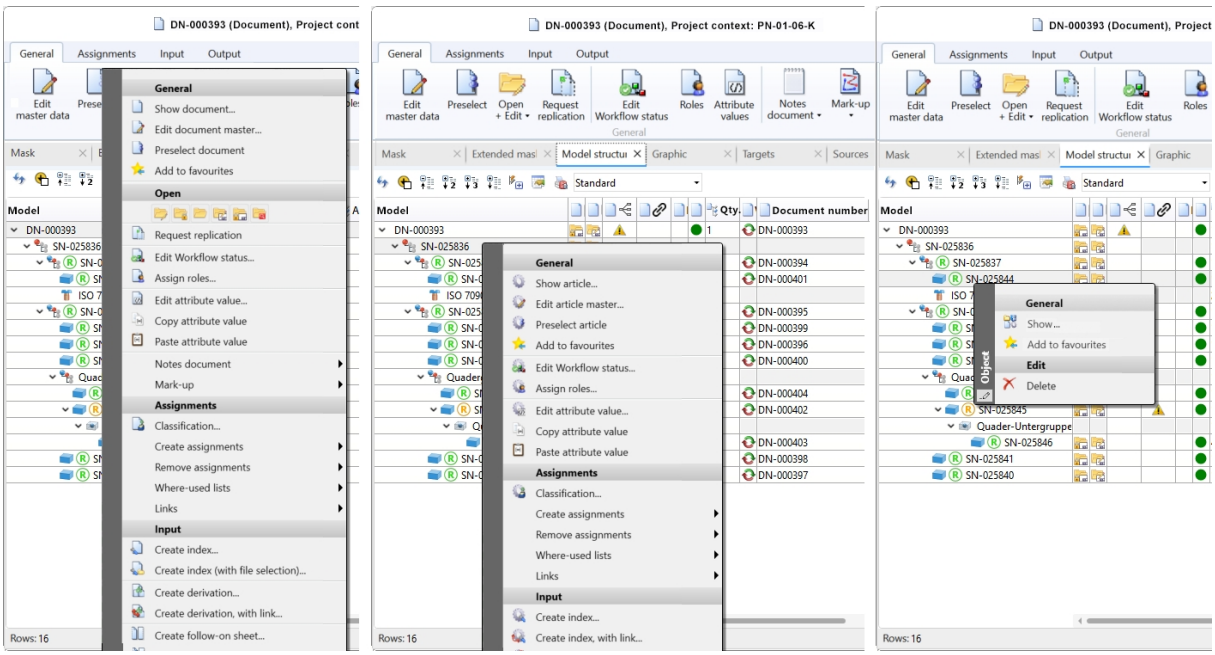
The **Model structure** tab of a HELiOS document master mask displays the document structure of HiCAD files (.SZA, .KRA). With the update to HELiOS 2026, this has been expanded to transfer and display the part structure from HiCAD:



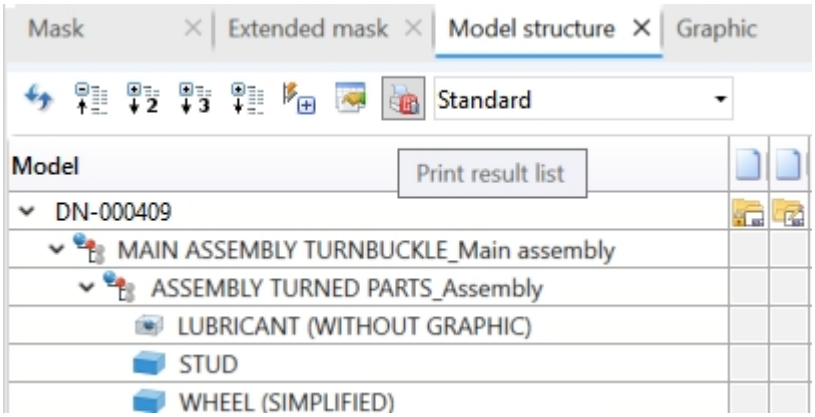
In addition to the icons for the respective part type, the model structure tree also displays the icons for referencing and dependent parts.

In addition, as part of the expansion of the model structure, some interface elements have also been expanded so that they now correspond to what you are used to in HiCAD.

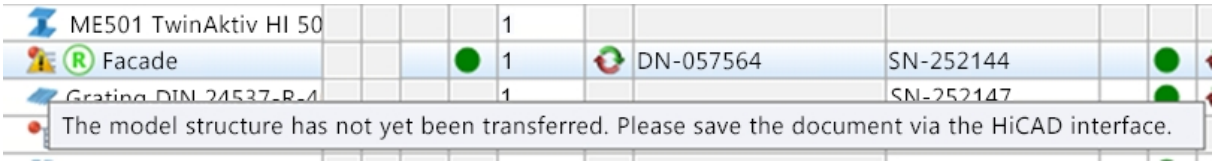
The context menu in the **Model** column of the **Model structure** results list depends on the existing context, i.e. the respective article, document or other object (or, if applicable, no) context menu is displayed.



In addition, you can transfer the **Model structure** of HiCAD drawings directly from the results list to the **Report Manager**, as you are already accustomed to doing in other areas of HELiOS.



Important: Please note that the model structure is only transferred or updated when saving from HiCAD to HELiOS, and therefore there may not yet be any corresponding data for existing data from older HELiOS versions. Currently, only the model structure of the changed part structures is synchronised when saving. In order to save the model structure completely for an SZA, all other (unchanged) referenced components must also be saved manually once. For subordinate structures for which no model structure has yet been transferred, this is indicated in the model structure by a warning icon with a corresponding tooltip.

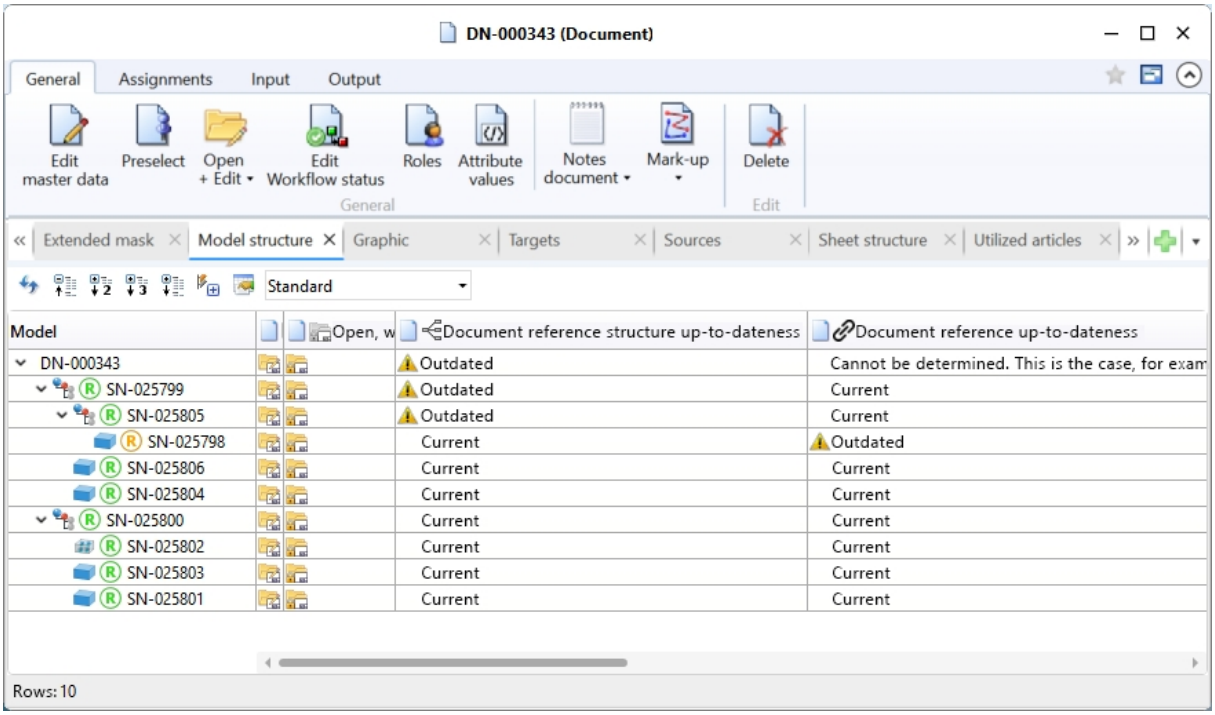


Document reference up-to-dateness, Document reference structure up-to-dateness

Please note that adjustments to the display of document references in HELiOS result in the following changes to the **Model structure**:

In the result list columns for the **Document reference up-to-dateness** and the **Document reference structure up-to-dateness**, the column entry for current documents remains blank in the icon display. If the display **With text** was chosen, the text **Current** is also displayed.

For outdated documents, a triangular warning symbol is displayed, or in the column display with text, **Outdated** is written next to it.



BOM-relevance of auxiliary and environment parts

Since auxiliary and environment parts are often integrated into a drawing but should not usually appear in bill of materials, HiCAD 2026 supports the following procedure with regard to referencing, BOM-relevance and the transfer of the model structure to HELiOS: to create auxiliary and environment parts outside the main assembly so that subsequent changes to already itemised parts do not lead to inconsistencies in item numbers and texts.

The following changes have been made for this purpose:

In the dialogue window of the HiCAD function **Itemise, with options**

, the option **Only within main assembly** has been added to the **General** tab, in the **Numbering** area.

The checkbox **Only consider parts within the main assembly** was added to the General area of the **Bill of Materials (BOM)** dialogue.

Two default settings were adjusted in the **Configuration Editor:**

- The referencing setting of the attribute **BOM-relevant** at **System settings > Attribute management > Attributes** has been changed from "Do not transfer" to **Standard behaviour**.
- At **Modelling > Change of part structure > Moving of parts out of main assembly allowed**, the checkbox is now active by default for all industries. Previously, this was only the case for the Steel Engineering module.

Virtual attributes: Document number via linked article

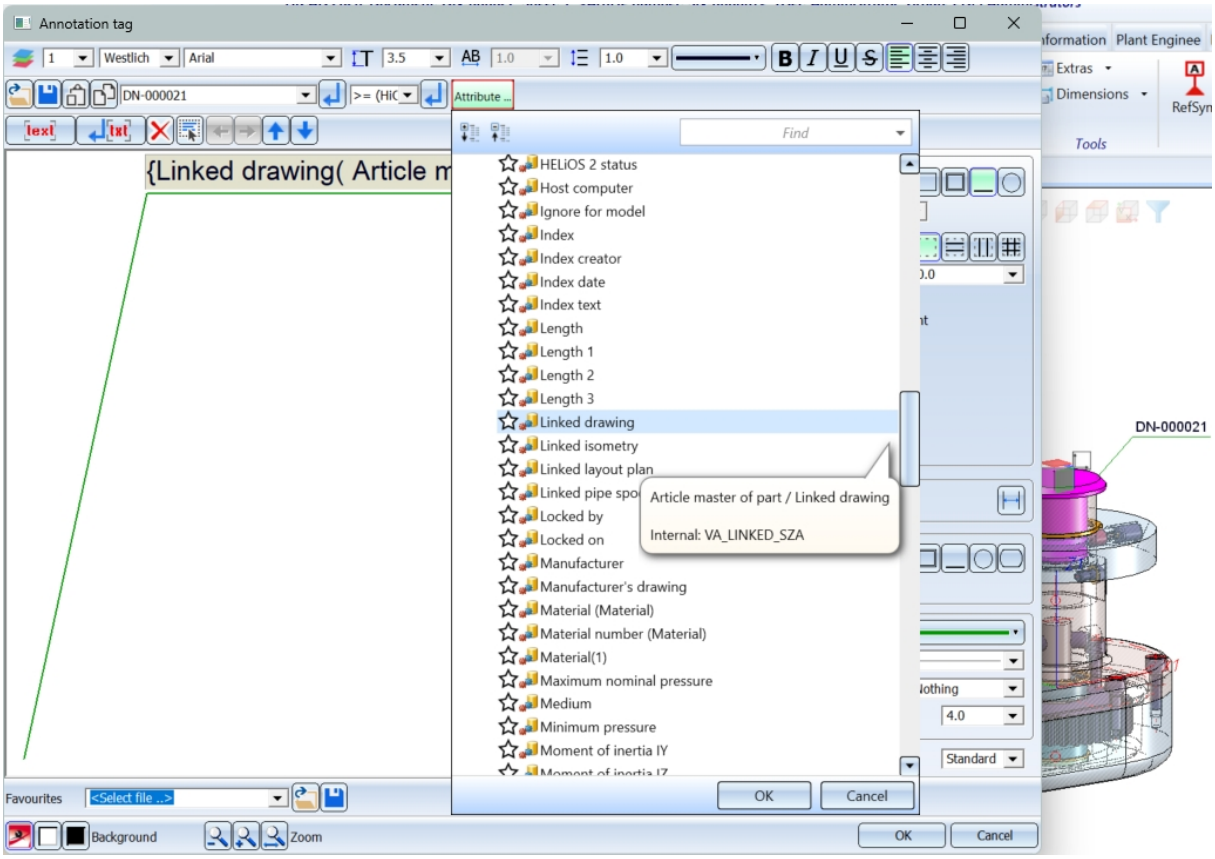
To output HELiOS document numbers via their link to an article, new virtual attributes have been introduced in HELiOS that take into account the different link classes:

Virtual attribute	Designation	Description
VA_LINKED_SZA	Linked drawing	This attribute displays the document number of a document linked to an article via the link class **Bauteil-Konstruktion**.
VA_LINKED_SPL	Linked pipe spool drawing	This attribute displays the document number of a document linked to an article via the link class **Pipeline-Spool**.
VA_LINKED_ISO	Linked isometry	This attribute shows the document number of a document linked to an article via the link class **Pipeline-Isometry**.
VA_LINKED_LAY	Linked layout plan	This attribute shows the document number of a document linked to an article via the link class **Pipeline-Layoutplan**.

Please note:

If there is more than one linked document, the document number of the first document found is returned.

You can find the new attributes in the HiCAD dialogue for annotation tags:



Hiding internal HELiOS attributes

Internal attributes are system attributes of HELiOS that are generally not relevant for end users when sorting result lists. They are therefore hidden by default in the attribute configuration, but can be displayed by deselecting the checkbox.

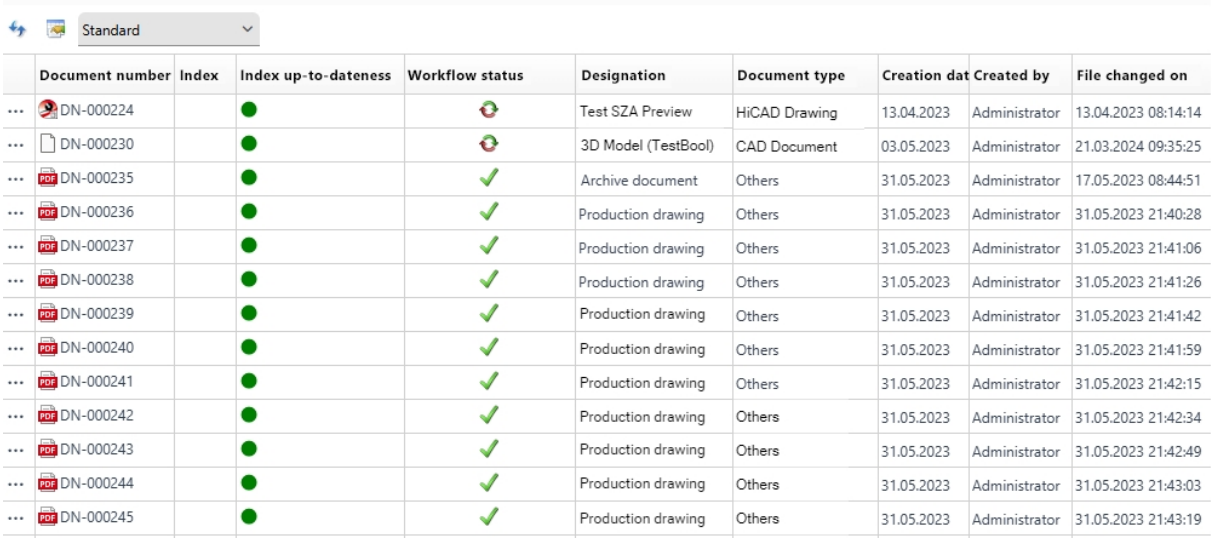
In HiCAD attribute selection masks, such as the Annotation Editor, the internal HELiOS attributes are now hidden alongside the internal HiCAD attributes.

Internet Server

Service Pack 1

Index up-to-dateness

The **Index up-to-dateness** status, which was already available to you in HELiOS Desktop in document result lists via the UI_DocumentNewerIndex attribute or in article result lists via the UI_ArticleNewerIndex attribute, has been incorporated into the document/article result lists of the HELiOS Internet Server interface as standard..

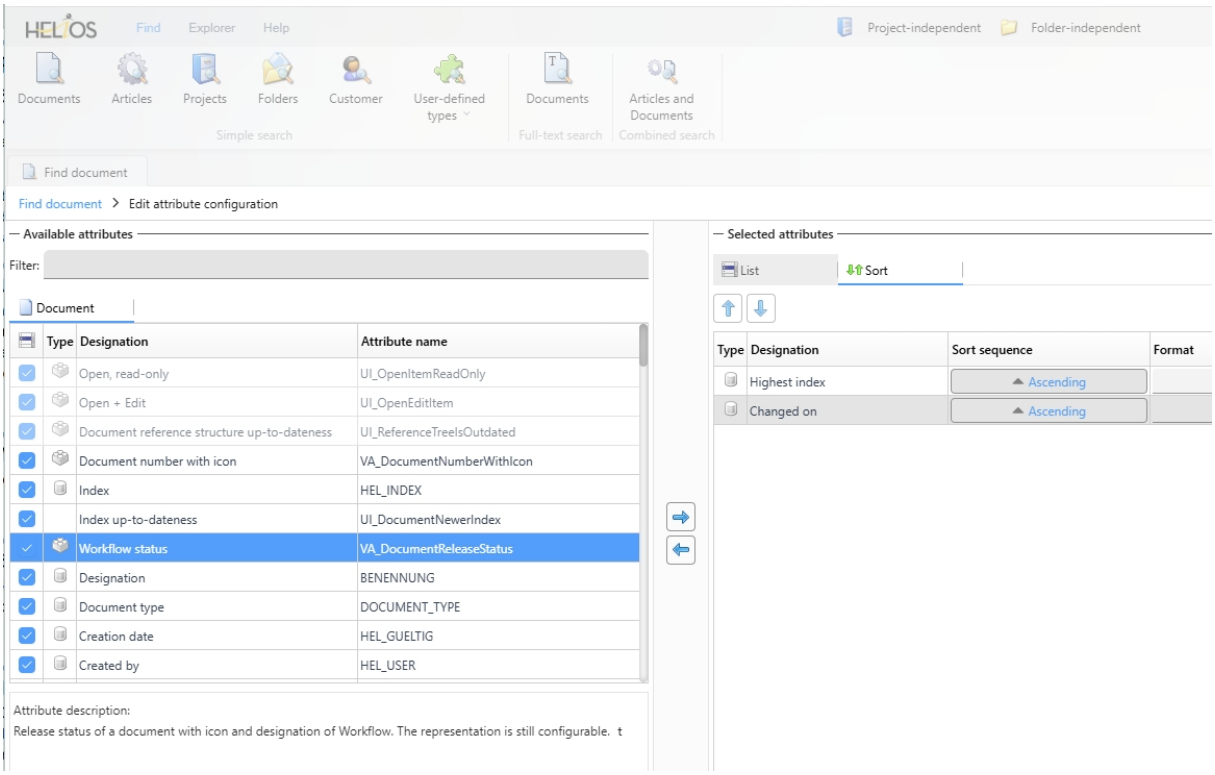


Document number	Index	Index up-to-dateness	Workflow status	Designation	Document type	Creation dat	Created by	File changed on
DN-000224		●	↻	Test SZA Preview	HiCAD Drawing	13.04.2023	Administrator	13.04.2023 08:14:14
DN-000230		●	↻	3D Model (TestBool)	CAD Document	03.05.2023	Administrator	21.03.2024 09:35:25
DN-000235		●	✓	Archive document	Others	31.05.2023	Administrator	17.05.2023 08:44:51
DN-000236		●	✓	Production drawing	Others	31.05.2023	Administrator	31.05.2023 21:40:28
DN-000237		●	✓	Production drawing	Others	31.05.2023	Administrator	31.05.2023 21:41:06
DN-000238		●	✓	Production drawing	Others	31.05.2023	Administrator	31.05.2023 21:41:26
DN-000239		●	✓	Production drawing	Others	31.05.2023	Administrator	31.05.2023 21:41:42
DN-000240		●	✓	Production drawing	Others	31.05.2023	Administrator	31.05.2023 21:41:59
DN-000241		●	✓	Production drawing	Others	31.05.2023	Administrator	31.05.2023 21:42:15
DN-000242		●	✓	Production drawing	Others	31.05.2023	Administrator	31.05.2023 21:42:34
DN-000243		●	✓	Production drawing	Others	31.05.2023	Administrator	31.05.2023 21:42:49
DN-000244		●	✓	Production drawing	Others	31.05.2023	Administrator	31.05.2023 21:43:03
DN-000245		●	✓	Production drawing	Others	31.05.2023	Administrator	31.05.2023 21:43:19

Sorting result lists

Similar to the option in HELiOS Desktop to configure sorting criteria for result lists, the update to HELiOS 2026 Service Pack 2 also includes a **Sort** tab in the result list configuration of the HELiOS Internet Server user interface.

In this sub-menu item, you can define the default sorting for the respective result list. This is then applied both during the initial setup and during each refresh (e.g., via F5) of a result list..



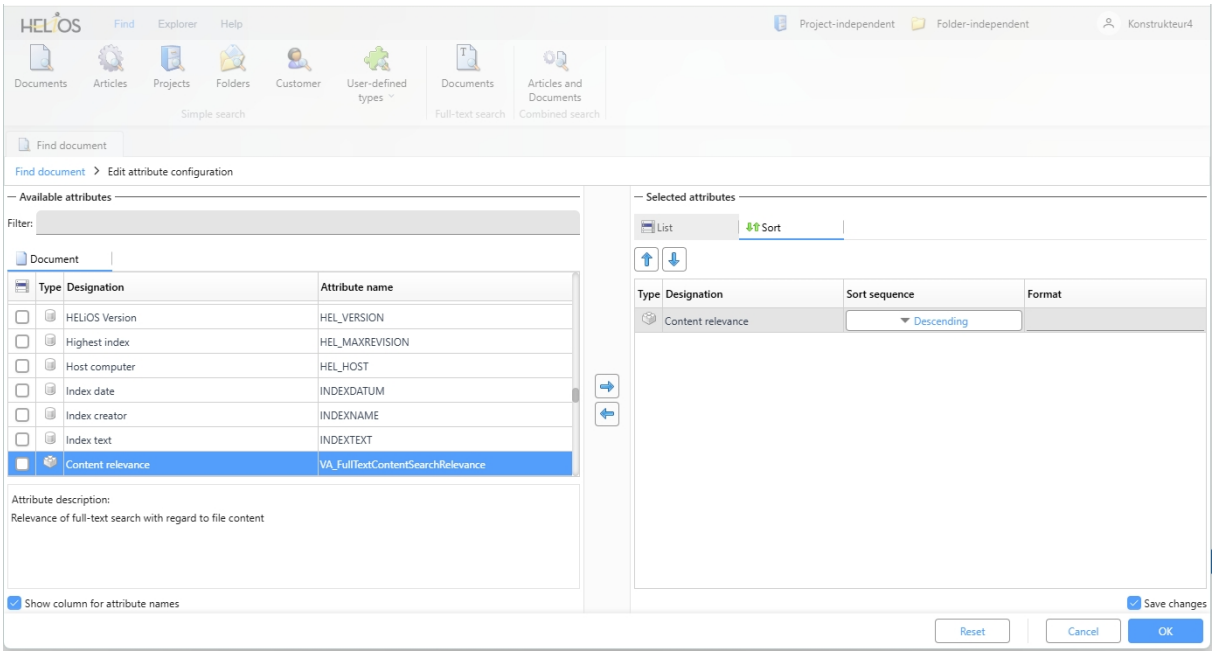
You can create a list of several attributes, which are then used in the specified order to sort the result list:

For each attribute, you can specify whether the attribute should be sorted in ascending or descending order (numerical, alphabetical). For example, always by the highest index (descending), but first by date from oldest to newest (ascending).

The attributes used for sorting do not necessarily have to be configured as visible columns in the result list in order to sort them.

Document full-text search: Sorting by content relevance

When using the full-text search newly introduced in HELiOS 2026, you have the option, as with HELiOS Desktop, of using content relevance as the default sorting criterion for the result list of the **Document full-text search** in the HELiOS Internet Server interface.


HELiOS
Find
Explorer
Help
Project-independent
Folder-independent
Konstrukteur4
Documents
Articles
Projects
Folders
Customer
User-defined types
Simple search
Documents
Full-text search
Articles and Documents
Combined search
Find document
Find document > Edit attribute configuration
Available attributes
Filter:
Document
Type
Designation
Attribute name
HELiOS Version
HEL_VERSION
Highest index
HEL_MAXREVISION
Host computer
HEL_HOST
Index date
INDEXDATUM
Index creator
INDEXNAME
Index text
INDEXTEXT
Content relevance
VA_FullTextContentSearchRelevance
Attribute description:
Relevance of full-text search with regard to file content
Show column for attribute names
Selected attributes
List
Sort
Type
Designation
Sort sequence
Format
Content relevance
Descending
Save changes
Reset
Cancel
OK

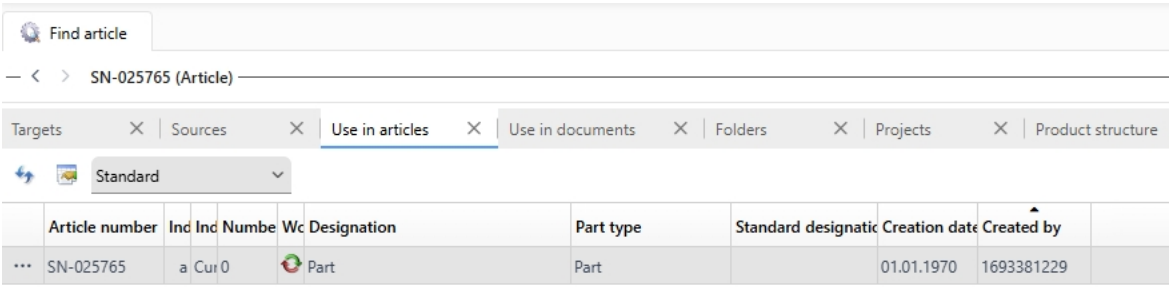
Use in articles, use in documents

With the update to HELiOS 2026 Service Pack 1, you will find two different tabs for article usage in the article detail window of the HELiOS Internet Server user interface:

- **Use in articles:** This refers to use based on the product structure.

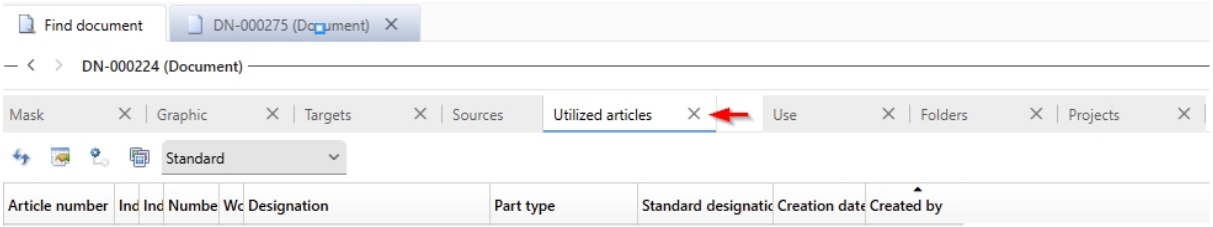
  (In earlier HELiOS versions, the tab was simply named “Use.”)

- **Use in documents:** This new tab lists all documents in whose model structure the active article is stored.



Move tabs in object detail windows by Drag & Drop

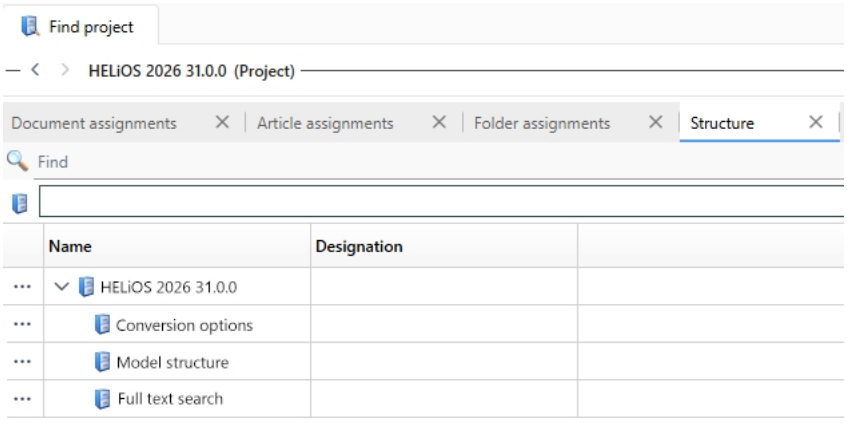
You can also change the order of the tabs in the detail windows of objects in the HIS user interface by dragging them with the left mouse button held down.



Structure

Similar to the HELiOS Desktop, you will also find a **Structure** tab in the HELiOS Internet Server user interface in the contexts of projects and folders.

This shows you the tree structure of the active folder or project in the corresponding detail window.



Installation of MIME types for PDF preview

To preview PDF documents, the IIS environment of your server system requires entries of certain MIME types.

The (new/update) installation of the HELiOS Internet Server checks this and enters the required MIME types if necessary.

For more information, please refer to the HELiOS Installation Notes.

Major Release

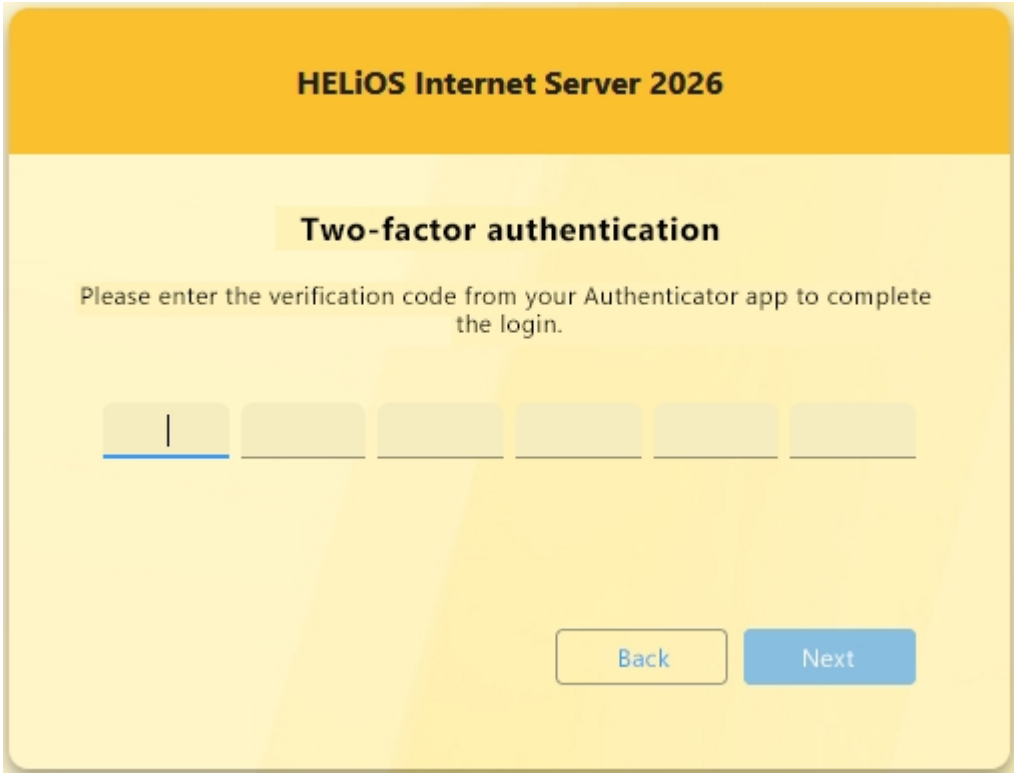
Two-factor authentication

Two-factor authentication (2FA) refers to the access authorisation of a user by means of a combination of two different and, in particular, independent components ("factors ").

Everyday examples of two-factor authentication include the use of a bank card and PIN number at ATMs or a login password and transaction number (TAN) for online banking.

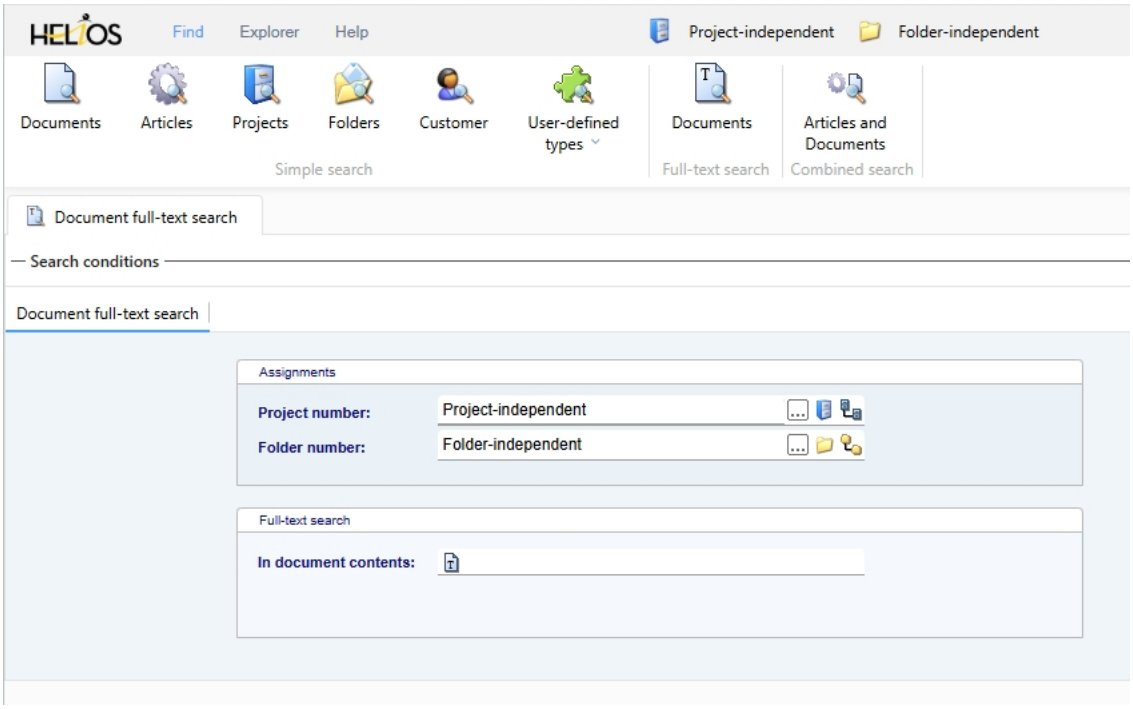
To log in to systems via the Internet, authenticator apps or apps based on the TOTP (time-based one-time password) method can be used as a second factor.

For increased security when logging in to the HELiOS Internet Server, you can now set up such two-factor authentication.



Full-text search

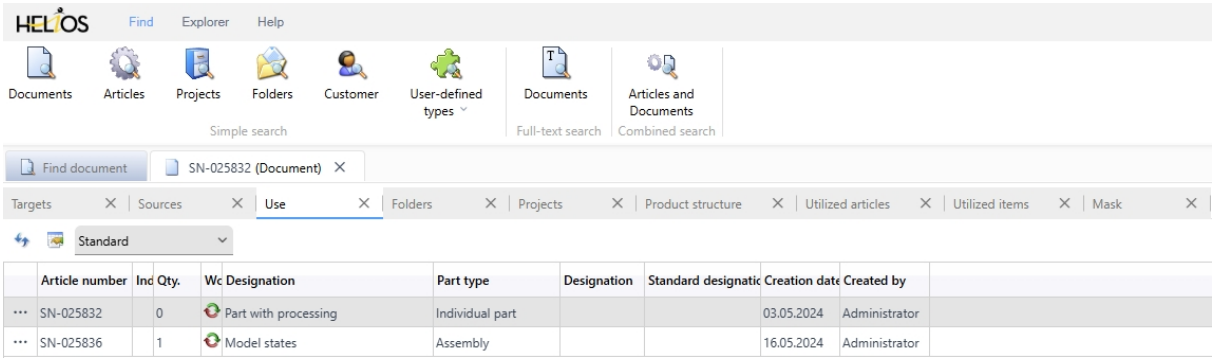
With the update to HELiOS 2026, the newly introduced **Full-text search** is also available in the HELiOS Internet Server interface.



Further object detail tabs in the HIS user interface

With the update to HELiOS 2026, you will also find some enhancements in the user interface of the HELiOS Internet Server.

These include tabs familiar from the HELiOS Desktop for the **Article**, **Document** and **Folder** detail views, such as **Use**, **Utilized articles**, **Utilized items** and **Objects** and **Sub-objects**.



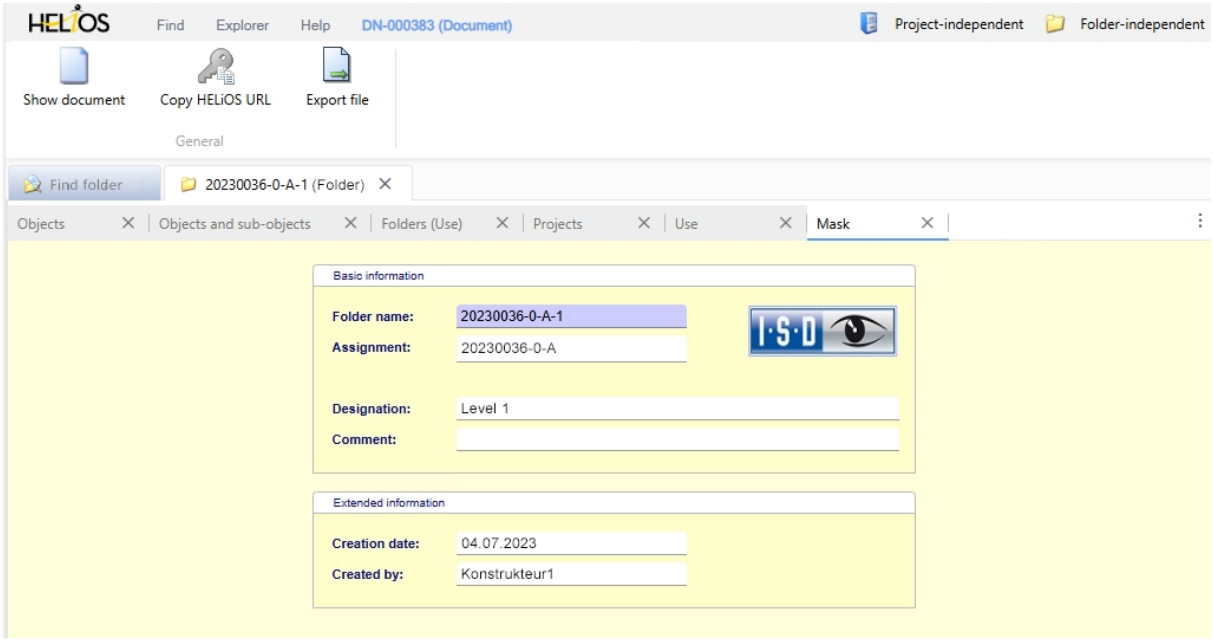
Keyboard control in result lists

Similar to the behaviour in HELiOS Desktop, you can also perform keyboard actions in result lists.

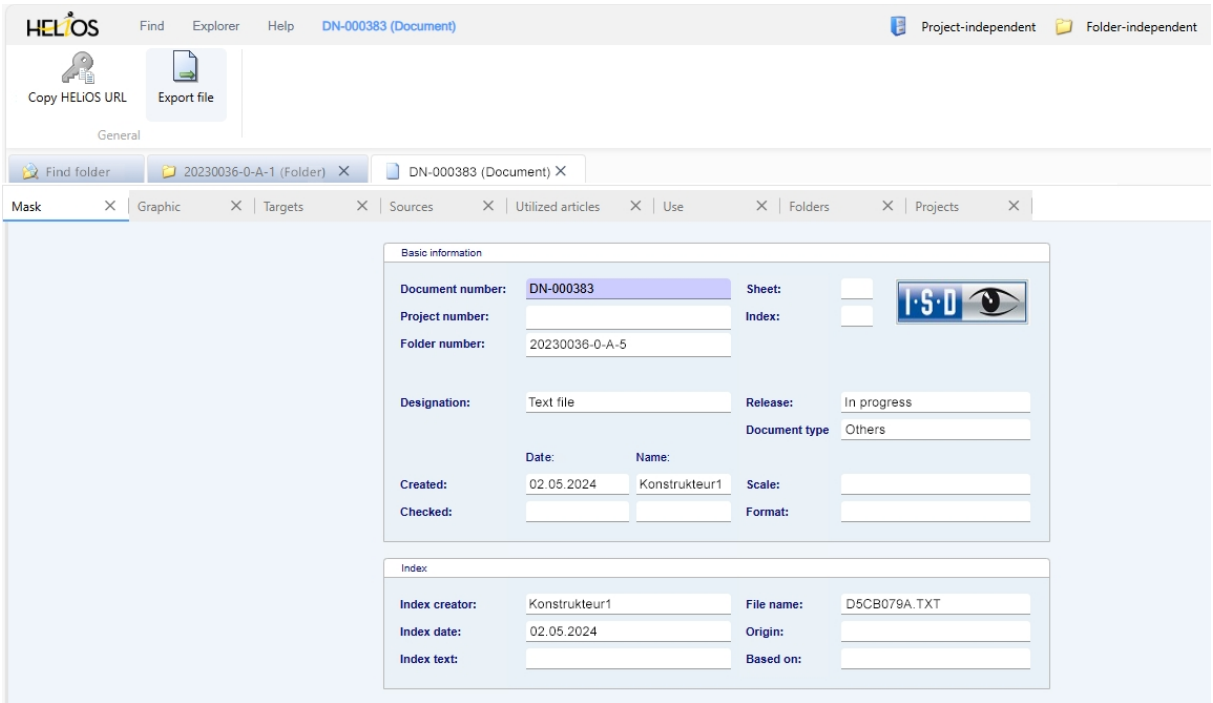
These include the Page Up, Page Down, Pos 1 and End keys, as well as key combinations with Shift or Ctrl.

Object-specific Ribbons with action buttons

When working with the HELiOS Internet Server, action buttons for the currently open object are displayed in a ribbon menu that is displayed specifically for this purpose.

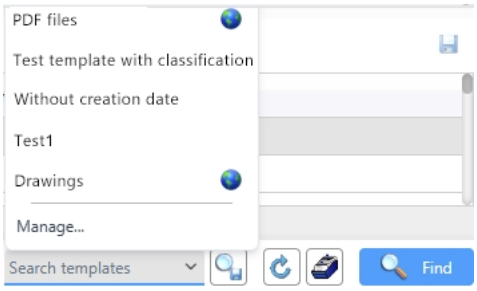


There you will find options for the active document, such as the ability to use the HELiOS protocol via **Copy HELiOS URL**, for example to set links to HELiOS documents from other applications and documents, and with one click on **Export file** you can download the document directly from the detail mask of the HELiOS Internet Server to your local system.



Further new features and enhancements

Further improvements to the HELiOS Internet Server interface in version 2026 include optimisation of breadcrumb navigation in the Explorer areas, more efficient updating of tree structures via the Refresh button, and further customisation of result list configurations, as you are accustomed to from the HELiOS Desktop.



High-quality preview images are always displayed in the graphic preview of HELiOS document detail masks.

In addition, TIFF/TIF images are now displayed in preview windows and can be zoomed, etc., provided that the browser used supports this feature.

This extension also allows you to zoom and move SZA previews.

By clicking on **Info** in the **Help** menu item in the header bar of the HIS user interface, you can open an info window that displays information about HELiOS, such as the current HELiOS version number (including build number) and the number of any hotfixes installed.

With the current version of the HELiOS Internet Server, the information has been expanded to include details about the database connection: The database ID of HELiOS, the name of the ODBC data source, the computer name of the database server and the SQL server instance, as well as the name of the HELiOS SQL database are also displayed, similiar to the HELiOS Desktop.

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