Tips & Tricks 2020

- HELiOS 2020 SP2 Spooler - Installation note (September 2020)

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

Please note that this also applies to update installations.

Further information can also be found in the Installation Notes - HELiOS 2020 manual.

- HELiOS Desktop - Start search with F3 (July 2020)

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

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

- HELiOS in HiCAD - Reduced loading (July 2020)

In the context menu and in the detail window ribbon of a HELiOS document, you will find the new function Open, with options under General. (as of HELiOS 2020).
If the document is an HiCAD drawing file (SZA format), an extended dialogue with additional options for reduced loading appears. This means that you can optionally select how to proceed when loading with isolated points. You can also activate the **Open, read-only** checkbox in this dialogue if the document should only be loaded for viewing and not for editing.

**HELiOS Multi-CAD - Filter workspace (June 2020)**

As of HELiOS 2020 SP1 the documents displayed in the Workspace can now be filtered so that only the directly opened documents are displayed.

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

**HELiOS Multi-CAD - Standard Part IDs and document master (March 2020)**

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

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

- In the context of the update to the 2020 version, the existing identifiers must be migrated.
- Please observe the related notes regarding update installations of the HELIOS interface in the HELIOS Installation guide.

**HELIOS in HiCAD - Open, with options: Reduced loading (February 2020)**

In the context menu and in the detail window ribbon of a HELIOS document, you will find the new function

Open, with options

under General.

If the document is an HiCAD drawing file (SZA format), an extended dialogue with additional options for reduced loading appears. This means that you can optionally select how to proceed when loading with isolated points:
HELiOS - New Mask Editor / new mask format (February 2020)

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

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

Due to the complete revision of the Mask Editor in HELiOS 2020, the previous mask format has been changed from .MSK to .XML. In addition, mask files are now managed outside the installation directory, resulting in some changes in the system architecture that Administrators must consider:

- The masks of older versions (before V 2500.0) that were previously stored in the SYS directory of the installation are automatically converted to the new XML format in case of an update installation and stored at %Programdata%.
- The new masks at %Programdata% should not be overwritten under any circumstances, as these represent the "delivery status", which will be updated by later update installations. If masks are edited and changed with the Mask Editor, you must store and call them at %Appdata%.

HELiOS for HiCAD - Loading of the current article master of semi-finished products in attached parts (January 2020)

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

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

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

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**Tips & Tricks 2019**

**HELIOS for AutoCAD - Wider range of functions (December 2019)**

In Service Pack 2 the AutoCAD interface has been equalized with the Inventor interface, which means that it now offers a wider range of functions. For instance:

- The **Options** dialogue now contains new options for updating XRefs. Besides an automatic updating, there is also an option to carry out manual updates.

- The attribute mapping that was previously editable via files, can now also be configured interactively.

- As with the other CAD interfaces, the **New in HELIOS** function is now also available in the HELIOS-AutoCAD interface. This function allows a graphic display of the structure, and enables you to assign values to article and document master masks before the desired (part) structure can be transferred to HELIOS at the push of a button. Even nested Xref structures can be easily taken over in this way.
If you are using a CAD system that is interfaced with HELIOS, e.g. Autodesk Inventor, the

**New in HELIOS** function for CAD model structure transfer to the HELIOS database will be available to you in the **Input** function group of the HELIOS Ribbon.

In the dialogue window of this function, the model structure is shown in the tree structure beneath **Create**. For the sake of a clearer overview, various elements here are identified by different symbols.
Additional, referenced 3rd party documents such as Office files, too, are considered and marked accordingly.
HELiOS 2019 SP2 - Important Notes on Updates for Administrators (October 2019)

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

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

1. Make a data backup before updating
   Make sure that a data backup was made before carrying out the update of your HELiOS database. For the backup, either use the HELiOS Database Creator (further information can be found in the Installation Notes) or your SQL Server Application. In case of any questions, or if you need any help with regard to your customized system architecture, contact the ISD Hotline.

2. If required, use the log file for the update
   If any conflicts occur during the update, these will be recorded in the log file HeliosDbUpdate.txt (in the system path %appdata%\ISD Software und Systeme\HeliosDbUpdate). Have this file ready when contacting the ISD Hotline in case of an unsuccessful update, so that they can help you solve the problem and make a successful update.

Migrating the local Workspace in case of an update to HELiOS 2019 SP 2 or higher (October 2019)

For some interfaces and for the HELiOS Desktop, HELiOS uses a local directory to which files for viewing or editing are transferred. In older versions, there was one Workspace per interface. To be able to edit and update files across different applications, we have successively migrated the HELiOS interfaces to one new, central, application-spanning Workspace.

From HELiOS 2019 SP 2 onwards, the old, application-specific Workspace will no longer be supported, and users who have used this Workspace must update to the new Workspace.

To see whether you are affected by this change, please read the information given in the file migrate_workspace.pdf.

Integrated preview for standard image formats (September 2019)

Image formats such as JPEG, TIF, BMP, PNG, etc. which have been saved as documents to HELiOS can now be displayed by the new, integrated graphic viewer (as of HELiOS 2019 SP1).

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

HELiOS Spooler - Combining different PDFs / Pausing the spooler (August 2019)

As of HELiOS 2019 SP1 the HELiOS Print Client now contains a new option for the Postprocessing of print jobs, which allows you to combine individual PDF pages into one document during automated print job processing.

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

The control via command prompt can be used for a time-controlled pausing and continuation of the Spooler, e.g. via Windows task planning.
If you work with different versions of a CAD software on the same local system, you have now (as of HELIOS 2019 SP1) the option to install the multi-CAD interface to HELIOS for each of it individually and simultaneously. For this purpose, the installation menu shows you all versions of CAD applications in a dialogue window for selection that exist in the system.

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

In the HELIOS Workspace you can find the new Changed, local column (as of HiCAD 2019), where a computer Symbol indicates that a document has been changed and saved locally since the last synchronization with HELIOS.
In the HELIOS Options dialogue window you can determine whether existing, locally changed documents are to be removed from the Workspace or not when Inventor is closed.

AutoSync of Part Attributes and HELIOS Article Master Data (March 2019)

With the new function Article master sync (as of HI CAD 2019) when saving you can specify which part attributes are to be synchronized with which article master data. These attributes are synchronized automatically with each saving procedure. Please note that the Transfer part attributes to HELIOS checkbox must be activated the ISD Configuration Management via System settings > HELIOS.

You find the function via Drawing > Itemisation/Detailing > Attr...

Detailed information can be found here.

Display of notes in E-mails when changing Workflow status (March 2019)

The notes entered by users when changing a Workflow status can now be integrated into pre-configured E-mails that are automatically sent by HELIOS (as of HELIOS 2019). This instantly provides the recipient of the E-mail with all essential information and required actions.
In the **EDBSETUP action list** of the corresponding Workflow step, enter the placeholder `<$EDB NOTE>` for the into the comment field of the E-mail action dialogue window that will open when you click on the Send E-mail button. The note will then appear in the E-mail.
Discontinuation of Windows 7 ® (February 2019)

Microsoft will cease the support for Windows by January 2020. Due to compatibility matters, HiCAD 2020 SP2 and HELiOS 2020 SP2 will thus be the final versions of our CAD and PDM systems which support Windows ® 7. The corresponding server operating systems (Windows Server 2008 R2 or older) will then no longer be supported either.

Integrated preview for standard image formats (February 2019)

As of HELiOS 2019 image formats such as JPEG, TIF, BMP, PNG, etc. which have been saved as documents to HELiOS can now be displayed by the new, integrated graphic viewer of HELiOS.

You can zoom into graphics and move the selected detail at any time. This allows an easy representation of neutral formats and reduces the number of external viewers that may be required.
Workspace for the HELiOS Desktop (February 2019)

As of HELiOS 2019 the Workspace that you already know from the Multi CAD and Office interfaces will be available to you in the HELiOS Desktop, too. Click on the Show workspace icon on the General Ribbon tab to open the HELiOS Workspace dialogue window.

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

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

Editing of attributes for combined items (February 2019)

Different values of attributes for combined items will now be indicated in the result list for Utilized items (as of HELiOS 2018). If the assigned attribute values are identical, you can directly edit them for all combined items in the result list.
Tips & Tricks 2018

- **Product structure: Switch item (December 2018)**
  
  As of HELiOS 2018 SP1 the context menu for items now contains the **Switch item** function.

  Use this function to switch an article of an item for another item. When you call the function the Find article dialogue window will be displayed. Here, choose the required article (a search for a concrete index is also possible here). Confirm to exchange the article. Please note that the function considers the settings for the Database option **Allow updating of released product structures**.

  Extensive information can be found in the [Online Help](#).

- **HELIOS - Remote Maintenance (November 2018)**

  When you install HELiOS 2018 (as of SP2 Patch 1), the Support tool TeamViewerQS.exe will now automatically be installed (in the sub-directory Remotesupport of your HELiOS installation). In case of problems that require support by the ISD Group, you have the option to call the TeamViewer tool from HELiOS.

  For a quick start of the tool, choose the **Remote Maintenance** function in the Help menu. Please note however that you should only use this tool if you have been requested to do so over the phone by staff members of our Helpdesk.

  After calling the function, you need to confirm the Windows security prompt, asking you whether you want to allow changes to your system by the tool. The TeamViewer will then automatically generate an **ID** and a **Password**, which may take some seconds. Let the support team member of the ISD Group have the ID and the Password to allow the remote access to your computer.
**HELIOS - Combined search - Filter options (November 2018)**

The behaviour of the [Combined search](#) function has been modified as of HELiOS 2018 SP2.

If you deactivate all link classes for the search, i.e. nothing has been selected in the field beneath Links, all objects matching the entered search criteria that are not linked to any other object will be shown in the corresponding result list.

In this way you can, for instance, list documents of already deleted articles in conjunction with other, attribute-related search criteria, e.g. in order to link, move or delete them.

Furthermore, you can search for articles without assigned drawing in order to determine for large assemblies whether drawings have been created for all related parts, or whether parts have been "overlooked" by mistake.

**HELIOS - Result list settings for Combined search (November 2018)**

Beneath [Object-specific](#) on the [Result lists](#) tab of the [HELIOS Options](#) dialogue window you can find a new pull-down menu item called [Document and Article](#) (as of HELiOS 2018 SP2).

This setting is for the Combined search function. It allows you, for instance, to display the result lists of a combined search sorted by document numbers in ascending order by default.

**HELIOS – Marking of new indices (October 2018)**

In the result list configuration you can find the new [Index up-to-dateness](#) Attribute. If an Article or a Document has a newer index, older indices will be indicated in the Index up-to-dateness column with a star Symbol.

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**Important notes on using the Remote Maintenance tool and on protection of your data:**

- To be able to use Remote Maintenance you require an active online connection.
- During the Remote Maintenance you can see what we do on your computer.
- With the ID and the Password that you give to our Helpdesk, remote access to your computer will only be possible once.
- All data, information or other knowledge that our Helpdesk obtains during the Remote Maintenance session, will neither be disclosed on third parties, nor used in any different way by us.
- The TeamViewer is a product of the TeamViewer GmbH, Jahnstr. 30, 73037 Göppingen, Germany, Phone: +49 (0)7161 60692 50, E-mail: service@teamviewer.com. Further information on the TeamViewer can be found on the website of the manufacturer of TeamViewer. There you can also find all required information on the topic of data security.
- Please also read the Notes on Data Protection by the ISD.
- By contacting our Helpdesk via the Remote Maintenance you confirm that you have read and understood the above notes.
Right-clicking the title of the **Index up-to-dateness** opens a context menu. The menu item **Strategy** allows you to choose between three different additional display options:

- **Newer index**
  
  The symbol indicates that a newer index exists for the listed object, i.e. that the index of the listed object is not up to date.

- **Newer index (detailed)**
  
  If the object is marked with the symbol, a higher (newer) index exists, but no newer released version of the object. The symbol indicates that higher and released indices exist for the listed object, but that the highest index has not been released yet. If a result list entry is marked with the symbol, this indicates that a version with a higher index with Workflow status **Released** exists.

- **Newer released index**
  
  If a result list entry in the **Index up-to-dateness** column is marked with the symbol, this indicates that a higher index with Workflow status **Released** exists.

Click [here](#) for further Information.

**HELIOS for Inventor – Apply server state (October 2018)**

In the Data function group of the HELIOS Ribbon or in the menu of the active part, you can find the **Apply server state** function (HiCAD 2018 SP2).

The **Apply server state** function checks whether the currently loaded document or the active
document is identical with the current server state. If this is not the case—e.g. because the document has been saved by a different user in the meantime, or exists with a newer index, or because the master data of a linked article have changed or the article exists with a newer index—use this function to apply the current Server state to the document.

HELIOS interface to Autodesk Navisworks (September 2018)
As of HELiOS 2018 SP1 an interface to the design review software Autodesk Navisworks can be established.

This interface will give you direct access to various HELiOS functions in Navisworks.

HELIOS: Result list button for opening of documents (June 2018)
As a faster alternative to a function selection via context menu (right-click and choose function), you have now the option to assign buttons to document result lists, allowing you to open documents in the linked application with one mouse click, either for editing or in read-only mode.

For this purpose the two attributes UI_OpenEditItem and UI_OpenItemReadOnly have been created, which just need to be activated in the result list configuration.

As of HELiOS 2018 Service Pack 1 these buttons are available in every result list with document context, e.g. in the Document Class Explorer, in the HELiOS Workspace, in the Targets tab of article master masks etc.
HELiOS: Template files in external folders (April 2018)

In the directory `HeliosMusterdateien` of your HELiOS or HiCAD installation you find template files for the different file types of the document input. The template file controls the link between the document and the application (HiCAD, Word, Excel, ...)

<table>
<thead>
<tr>
<th>Name</th>
<th>Typ</th>
</tr>
</thead>
<tbody>
<tr>
<td>HiCADKonstruktion.sza</td>
<td>HiCAD Konstruktion</td>
</tr>
<tr>
<td>Microsoft-Excel Dokument.xlsx</td>
<td>Microsoft Excel-Ar...</td>
</tr>
<tr>
<td>Microsoft-Word Dokument.docx</td>
<td>Microsoft Word-Dok...</td>
</tr>
<tr>
<td>Textdokumenti.txt</td>
<td>Textdokument</td>
</tr>
</tbody>
</table>

To be able use a central template file directory for multiple workstations, e.g. in order to manage them in one or several central places for different workstations in a department, you can create an .ini file in the local template file directories which refers to these directories (e.g. network drives on Servers etc.). To do this, create a file called "TemplateExtensions.ini" in the corresponding directories. The content of the file corresponds to the paths to be considered, e.g.:

```
[path_include]
\\server1\share\SomeTemplates
\\server2\share\SomeMoreTemplates
```

Files located in these folders will then be considered for the HELiOS template file selection dialogue on the local HELiOS workstations. Please ensure that file names are not assigned twice on different directories. If in doubt, clear the local directories for a central managing of the template files.

Editing of attributes for combined items (March 2018)

In the product structure of the HELiOS Desktop you have now the option to combine multiple items with identical attribute values into a set on the Utilized items tab. This will then allow you to change the attributes of such combined attributes in one step (as of HELiOS 2018). To combine the items into a set, right-click an item attribute (e.g. Item number or Qty.) and choose Create set.

Items combined into a set will be marked with a “Plus” sign in the first column on the left of the result list. Clicking on the “Plus” sign breaks up the set again, turning the “Plus” sign into a “Minus” sign. Clicking the “Minus” sign creates a set again.

As of HELiOS 2018, a direct editing of items that have been combined into a set will be possible. If the attribute values are identical, you can edit them directly and for all items of the set (double-click the set). If the attribute values are not identical, this will be indicated in the
result list by the Comment Different values. In this case you must edit the items individually.

**Please note:**
Items with different revision indices and different CAD-relevance (i.e., items with CAD link and items without CAD link) cannot be combined into sets. When you attempt to create a set of multiple items only some of which have a CAD link, all items with CAD link and all items without CAD link will be combined into two separate sets.

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**Tips & Tricks 2017**

- **Notes on File Conversion via the Spooler - Hel_fileprint.ini (December 2017)**

  CAD drawings can be converted into other formats via the HELIOS Spooler, e.g., from HiCAD files (.SZA) to STEP or 3D-PDF, from SOLIDWORKS into the .TIF format, or Inventor sheet development files.

  For this you require the `hel_fileprint.ini` file in the sys directory of your HELIOS or HiCAD installation. This file contains the names of the files to be output as PDF files or to be converted into other file formats.

  In the file the two keywords ATTR and FIX can be used: ATTR defines the document attribute to be used for the file name, and FIX defined a fixed text.

  Each definition needs to be written in its own row.

  **Example:**

  ```plaintext
  ATTR = HEL_DOKUNUMMER
  FIX = -
  ATTR = HEL_BLATT
  FIX = #
  ATTR = HEL_INDEX
  ```

  creates a file name consisting of document number, sheet number and index, each of which are separated by a minus sign or a hash, i.e.,

  `[Document number]-[Sheet number]#[Index]`

  Via the keyword ATTR only document management attributes will be output.

  Click [here](#) for further Information.

- **HELIOS - Favourites - Displayed Index (July 2017)**

  If you click on the **Show objects symbol** in the **Favourites** window, you can choose whether the objects in the Favourites window are to be displayed with the index with which they had been added, or with their highest index (if any).

  The **Concrete index** shows the object (Document, Article, Folder, Project) with the index with which it was added to the Favourites.

  The **Current state** shows the objects with their highest index.

  This allows you to take a look both at the origin of objects that have changed in the meantime.
and their most recent state in the Favourites window.

HELIOS - Filter for parts where-used list

The result list for the use of parts or assemblies (parts where-used lists) can now be further refined by means of user-defined filters, allowing you to retrieve relevant parts even faster. (as of HELIOS 2017 SP1)

This allows you, for instance, to save search templates that will show you,

- in which currently released assemblies a particular part with a particular index is directly or indirectly contained, or
- in which pre-mounted facade parts a particular sealing element has been used throughout different projects.

As is the case with the combined search, article classes and links can be considered. The latter is, for instance, relevant for filtering for mechatronical items in mechanical engineering or electrical engineering BOMs, since mechanical engineering article are normally linked to a CAD document.
In older HELiOS versions, the UI settings on various workstations could be aligned and standardized by manually copying the corresponding system files to the various systems. The Export/Import mechanism facilitates this process significantly.

From HELiOS 2017 onwards, changes to the UI of the HELiOS Desktop can be exported as ZIP packages, and re-imported on a different workstation. You can choose which changes are to be exported and imported.

Such changes can also be defined and distributed already during installation. In the Extended settings window of the installation mask you have the option to import a UI configuration.
If interfaces between HELIOS and MS Word, Excel or Outlook have been created, you will find an additional menu called HELIOS in the respective software. It is generally possible to adjust the range of available functions of the HELIOS menu (e.g. deactivate a button). The UI settings for this can be found in the \Recources\Ribbon\OfficeUI\ directory of your HELIOS installation, where the files

- Ribbon.Document.XML for the settings in Word and Excel, and
- Ribbon.Explorer.XML for the settings in Outlook

are located.

To deactivate a function in the UI, rename the switch getEnabled="(...)" beneath the Button ID of the function to enabled="false" in the corresponding system file. For instance, if you want to deactivate the function Attribute fields > New, you need to change the line

generated="IsCUrrentDocumentInHelios" to enabled="false" beneath <button id="BtnAttAdd"


The function can then no longer be accessed in the Office UI.

Please note:
XML is a Microsoft format that is not treated as a configuration by HELIOS, i.e. it may be overwritten in the course of updates, changing the structure of the relevant files in the process. No warning message will be issued.

In such cases, changes in the files will also be overwritten during HELIOS updates and must be renewed.

Improper modifications can render the HELIOS-Office interface inoperable! If you need any further information, please contact the Consulting team of the ISD.

HELIOS - MS Office interface with expanded attribute selection

The selection dialogue for the placing of HELIOS attributes in an Office document has been adjusted to the current HELIOS Desktop standards.

As a result, a wider range of functions of attributes that can be placed in title block is available to you. This also included reference attributes such as the Material ID (Material) or Customer data.

Furthermore, you can use the filter function to search directly for specific attributes.

Click here for further information.

HELIOS - Admin Tools

As of HELIOS 2016 SP2 the Admin Tools tab provides direct access to

- the User and Workflow Management EDBSETUP, and

Please note:

- The Classification functions that were available on the Admin Tools tab of older versions have been removed with the introduction of the new Class Explorers.
- The Admin Tools tab is only visible if you are logged in as an Administrator.

HELIOS – Other export formats in the Spooler
As of HELiOS 2016 SP2 a conversion of SZA files via the HELiOS Spooler will be possible for the following target formats:

- IFC
- 3D-DXF
- 3D-DWG
- ACIS
- Parasolid
- Catia V4 and Catia V5
- ProE
- VDAFS
- Iges

The Set-up on the Client takes place in the system file hel_fileconvert.ini.