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Contents

1	Batch Server.....	4
1.1	Batch queue table in Agile PLM (T_CAX_PLT).....	4
1.1.1	Installation.....	4
1.1.2	Batch queue structure.....	4
1.1.3	Creating batch jobs.....	6
1.2	Connector configurations.....	8
1.2.1	Recommendations.....	8
1.2.2	Creation systems.....	8
1.2.3	Transactions.....	9
1.2.4	Job types.....	9
1.2.4.1	Autodesk AutoCAD Mechanical.....	10
1.2.4.2	Autodesk Inventor.....	11
1.2.4.3	Siemens Solid Edge.....	13
1.2.4.4	Dassault SOLIDWORKS.....	15
1.2.5	Further configurations.....	18
2	Encryption Helper.....	19
2.1	Introduction.....	19
2.2	Usage.....	19

1 Batch Server

1.1 Batch queue table in Agile PLM (T_CAX_PLT)

To enable batch job execution a certain database instance, the *Batch Queue*, is necessary in the Agile PLM environment. The *Batch Queue* can be created manually or obtained from XPLM as well. To manually create the *Batch Queue* follow the instructions bellow.

1.1.1 Installation

To enable batch job execution a certain database instance, the *Batch Queue*, is necessary in the Agile PLM environment. The *Batch Queue* can be created manually or obtained from XPLM as well. To manually create the *Batch Queue* follow the instructions bellow.

1.1.2 Batch queue structure

Log in to Agile PLM with a privileged account (super user account). Open the form of entity data and add the following entity to the environment:

- Entity Name: CAX-PLT
- Table: T_CAX_PLT
- Type: T
- Default List: CAX-PLT-SLI
- Default Form: CAX-PLT-SFR
- Title: (Empty)
- Comment: Batch queue



The following table is split between columns *Unique 2* and *Index 3*.

Table 1: Fields (example, based on customer needs)

Field Name (T_CAX_PLT*)	Sequence	Type	Index 1	Unique 1	Index 2	Unique 2
DOC_CID	10	I10		-		-
CRE_SYSTEM	20	S20		-		-
DOCUMENT_ID	30	S40		-		-
DOC_TYPE	40	S20		-		-
TYPE	50	S20		-		-
STATUS	60	S20		-		-
DESCR	70	S255		-		-
ENTRY_DATE	80	D		-		-
EDB_USER	90	S50		-		-
VER_DATE	100	S20		-		-
VER_VIEW	110	S20		-		-
CUSTOM_PAR	120	S255		-		-

Field Name (T_CAX_PLT:*)	Sequence	Type	Index 1	Unique 1	Index 2	Unique 2
ECC_PROJECT	120	S20		-		-
COPIES	130	I10		-		-
PLOTTER	140	S40		-		-
PAPER_TYPE	150	S20		-		-
PAPER_SIZE	160	S20		-		-
CONV_FLG	170	L		-		-
SITE	200	S20		-		-
COMPANY	210	S20		-		-
CONFIG	220	S20		-		-
DOC_VERSION	230	S10		-		-
DOC_REVISION	240	S10		-		-
LAYER	250	S20		-		-
UPD_ATT	260	L		-		-
BASELINE_ID	270	S80		-		-
PRIORITY	280	S20		-		-
NODE	290	S40		-		-
CAX_RELEASE	300	S20		-		-
NOTE	310	S100		-		-
MODE_INFO	320	S100		-		-
ORDER_NO_ID	330	S20		-		-
PLOT_SITE	340	S20		-		-
ORDER_SITE	350	S20		-		-

Index 3	Unique 3	Language	Mode	NN	Field Title	Descriptio	Check string	Default Value
-				n	DOC_CID			
-				n	CRE_SYSTEM			
-				n	DOCUMENT_ID			
-				n	DOC_TYPE			
-				n	TYPE			
-				n	STATUS			0
-				n	DESCR			
-				n	ENTRY_DATE			
-				n	EDB_USER			

Index 3	Unique 3	Language	Mode	NN	Field Title	Descriptio	Check string	Default Value
-				n	VER_DATE			
-				n	VER_VIEW			
-				n	CUSTOM_PAR			
-				n	ECC_PROJECT			
-				n	COPIES			1
-				n	PLOTTER			
-				n	PAPER_TYPE			
-				n	PAPER_SIZE			
-				n	CONV_FLG			n
-				n	SITE			
-				n	COMPANY			
-				n	CONFIG			
-				n	DOC_VERSION			
-				n	DOC_REVISION			
-				n	LAYER			
-				n	UPD_ATT			n
-				n	BASELINE_ID			
-				n	PRIORITY			
-				n	NODE			
-				n	CAX_RELEASE			
-				n	NOTE			
-				n	MODE_INFO			
-				n	ORDER_NO_ID			
-				n	PLOT_SITE			
-				n	ORDER_SITE			

Make sure that the created entity can be discovered and managed (granted read and write permission) by all relevant users and also the user account that is used to connect the Batch Server to Agile PLM.

1.1.3 Creating batch jobs

To create a batch job, a new entry must be added to the batch queue table (CAX-PLT-SLI). Batch jobs could be added manually, however, it is more convenient to use a mask trigger or a custom action to add the entries. Not all fields of the table need to be filled out, but the following are mandatory:

- *DOC_CID*: This field contains the C_ID/JOIN (not C_ID/ORI) of the document that should be processed.

- **CRE_SYSTEM:** The CAD system that is used to handle the data stored in the particular Agile PLM document. for example Autodesk Inventor (refer to chapter [Creation systems](#) on page 8 for more details).
- **DOCUMENT_ID:** The document number (also called document ID) of the Agile PLM document.
- **DOC_TYPE:** The type of the Agile PLM document, for example 3D_MODEL or DRAWING.
- **TYPE:** The batch type that should be executed, for example PDF (refer to chapter [Job types](#) on page 9 for more details).
- **STATUS:** This field describes the status of a batch job using a numerical value. When a batch job should be scheduled for execution the value is set to 0.
 - 0: waiting for execution
 - 1: execution successfully finished
 - 2: in work
 - 3: error occurred during execution
- **DESCR:** Describes the status of a batch job in words, may contain detailed information on errors having occurred during execution.
- **CUSTOM_PAR:** Describes additional parameter for the batch job. Entries must be separated with semicolon ; without spaces.
 - For example: If CAD should be closed after a batch job has finished, add the parameter CADClose=1.

Table 2: Error messages during batch process

Error codes	Description
Element locked (Element locked [58])	Indicates C_Lock, locked dataset or missing authorization.
No such element (No such element [32])	Dataset not found (may a newer version exist).
Not enough parameters (Not enough parameters [93])	File type maybe not defined in file usage table.
Too many elements (Too many elements [83])	
Error saving file error code 256.	The file format is CAD unknown and cannot be processed.
Error saving file error code 0.	Unknown error during process. May the model was not converted to the correct CAD version.
Storing of entity data failed (Storing of entity data failed [61])	The message appears if the BLOB is bigger than the maximum file size for the preview in Agile PLM.
Node XPlm/ Transaction[Aliasname='CheckinDocumentView FileByClient_[TYPE]']/Import/Parameter not found in C:\Program Files\XPLM Solution GmbH\ecx \components\xml\XPlmA9<cad>Transaction.xml.	<i>TYPE</i> is not defined in <code>XPlmA9<cad>Transaction.xml</code>

1.2 Connector configurations

1.2.1 Recommendations

Following chapter describes configuration recommendations for Batch Server.

XPlmBatchServerConfig.xml

Open file `%xPlmRootDir%\xml\XPlmBatchServerConfig.xml` and increase value of `BatchJobProcessRunResetCounter` (for example 1000000000). This option defines after how many processes Agile PLM client restarts.

XPlmBatchServerAgileEDM.xml

Open file `%xPlmRootDir%\xml\XPlmBatchServerAgileEDM.xml` and set `ClientShutdownCommandFile` to an invalid path. This prevents client from being constantly restarted.

Furthermore, set `ShutdownClientOnError` to `0`. This prevents client from being closed after an error occurs.

Autodesk AutoCAD

XPlmAutoCADConnector.xml

Open file `%xPlmRootDir%\xml\XPlmAutoCADConnector.xml` and set `AutoCADEvent_ExitNotify` to `false`. This prevents a message box from opening when closing Autodesk AutoCAD.

Autodesk AutoCAD settings

Adjust *Plot and Publish* settings.

1. In Autodesk AutoCAD open menu **File > Options**, switch to tab *Plot and Publish* and set **DWG To PDF.pc3** as default output device.
2. Save changes and close dialog.
3. Enter PAGESETUP in command line and press **Enter**.
4. In upcoming dialog *Page Setup Manager*, press **Modify...**
5. In dialog *Page Setup - Model*, set *Printer Name* to **DWG To PDF.pc3**.
6. Press **PDF Options...**
7. Disable **Show results in viewer**.
8. Save changes and close dialogs.

1.2.2 Creation systems

- **File of interest:** XPlmBatchServerAgileEDM.xml

The `<CADSystem><cad></CADSystem>` looks for jobs having `<cad>` as a system in the defined Agile PLM queue table. Please ensure that this value match with the value in the queue table.

If the XPLM Batch Server starts and stops the Agile PLM client automatically, a configuration in the `XPlmBatchServerAgileEDM.xml` is needed. Both parameters must point to a valid and working `ECI.cmd` file.

Furthermore the configuration key `ShutdownClientOnError` affects the behavior in case an error occurs. If the value is set to `1`, the client closes and the current job terminates. The client restarts for

further jobs. If the value is set to `0`, the client remains open and searches for a new batch job. It is set to `1` by default.

```
<XPlmBatchServer>

  <Settings>
    <Configuration key="Location" value="Default"/>
    <Configuration key="PriorityList" value="High;Middle;Low"/>
    <!-- <Configuration key="CADSystem" value="SolidWorks;Inventor;SolidEdge;AutoCAD"/>
    -->
    <Configuration key="CADSystem" value=""/>
    <Configuration key="ClientStartupCommandFile" value="C:\ProgramData\Oracle\Agile\EDM
\jacc.cmd"/>
    <Configuration key="ClientStartupCommandParam" value="-t"/>
    <Configuration key="ClientStartupWaitTime" value="10"/> <!-- [sec] -->
    <Configuration key="ClientShutdownCommandFile" value="C:\ProgramData\Oracle\Agile
\EDM\jacc.cmd"/>
    <Configuration key="ClientShutdownCommandParam" value="-p"/>
    <Configuration key="PlmCaxPlotDescFieldLength" value="255"/>
    <Configuration key="ShutdownClientOnError" value="1"/>
  </Settings>

</XPlmBatchServer>
```

1.2.3 Transactions

- **File of interest:** XPlmBatchServerAgileEDMTransaction.xml

This file contains batch related information such as the used port, used queue table in Agile PLM and mapped fields.

To keep customer specific changes available after a possible connector upgrade/update/reinstallation, copy this file and add the *Customer_* prefix to it.

1.2.4 Job types

Definition

- **File of interest:** XPlmBatchServerAgileEDMBatchDefinitions.xml

This file contains the job information for all CAD applications capable of using the XPLM Batch Server.

`<Aliasname>[CAD]_JOB_DXF</Aliasname>` (for example) creates a DXF file. The definition after the last `_` is also the definition that has to be used in the Agile PLM queue table.



Just changing those values is not sufficient as long as the script (or customer script) engine has not been changed as well.

The following options are used to trigger the script engine like `XPlmClientCallback` did. Therefore a class `CScriptEngineInvokeHelper` was introduced which allows these options as input:

- `CO`: CreateObject

Means simple create object call (LateBinding) and so in memory off the calling instance.

- **D**: direct (add-in, CAD connector)
Means via CAD connector the add-in is retrieved and in memory of the CAD the script engine is instantiated.
- **CS**: comservice FC Event
Means via `FieldCollection` event of the `ComService` done by the `ComService` wrapper.
- **CSRM**: ComServiceRunMacro
- **XURM**: XPlmUtilitiesRunMacro
- **D =>** means via cad connector the addin is retrieved and in memory of the cad the script engine is instantiated
- **CS =>** means via FieldCollection-Event of the ComService done by the ComService Wrapper
- **CO =>** means simple CreateObject call (LateBinding) and so in memory off the calling instance

These options can be set in `XPlmBatchServerAgileEDMBatchDefinitions.xml` structure `xPLMHeader InvokeMode`. For `InvokeMode`, `ConnectorProgID` and `AddinProgId` must be defined. This allows for example triggering the script engine in memory of the CAD itself directly in `InvokeMode`. If, for example, `CO` is used, it behaves like before which instantiates a script engine in memory of the `BatchWorker` process and not in context of the memory of the CAD itself.



InvokeMode for Siemens Solid Edge is currently not available.

1.2.4.1 Autodesk AutoCAD Mechanical

Table 3: Jobs for drawings

DOC_TYPE	TYPE
DRAWING	PDF
	SINGLESHEET-PDF
	DWF
	DWFX
	JPG
	JPEG
	TIF
	BMP
	PNG
	EPS
DXF	



The used plotter for single sheets must be defined in page setup. For multi sheets, the used plotter cannot be configured. The plotter last used for successful publishing is used.

Table 4: Save options

DOC_TYPE	TYPE	Comment
DRAWING	SAVE	Drawing is saved to Agile PLM without children.
	SAVE2	Drawing is saved to Agile PLM with children.

Table 5: Others

DOC_TYPE	TYPE	CUSTOM_PAR	Comment
DRAWING	EXPORT		Exports root element without drawings.
		EXPORT_DRAWINGS=1	Exports root element with all drawings of root element and children.
		EXPORT_DRAWINGS=0	Exports root element without drawings.
		EXPORT_DRAWINGS=1; EXPORT_ALL_DRAWINGS=0	Exports root element with drawings of the root element.

1.2.4.2 Autodesk Inventor

Table 6: Jobs for drawings

DOC_TYPE	TYPE	Comment
DRAWING	PDF	
	SINGLESHEET-PDF	
	TIF	
	DXF	Set <code>ALL SHEETS=No</code> in section <code>[EXPORT DESTINATION]</code> and set <code>USE TRANSMITTAL=No</code> in section <code>[EXPORT SELECT OPTIONS]</code> of <code>EXPORTDXF.INI</code> (<code>C:\Users\Public\Documents\Autodesk\Autodesk Inventor [version]\Design Data\DWG-DXF</code>). Set the path of the .ini file in <code>XPlmA9<cad>Transaction.xml</code> , transaction <code>ViewableExportParameter_DXF</code> .

Table 7: Jobs for parts and assemblies

DOC_TYPE	TYPE	CUSTOM_PAR
3D_MODEL	PDF	
	3DPDF	
	TIF	
	JT	
	STEP	
	STL	
	IGS	
	VRML	

DOC_TYPE	TYPE	CUSTOM_PAR
	BLOB	<p>1. STRUCTURE_LEVEL</p> <p>Possible values:</p> <p>0: complete structure</p> <p>1: Top Element</p> <p>2: up to 1st Level</p> <p>3,4,...:up to 2nd, 3rd,...</p> <p><i>Example:</i> STRUCTURE_LEVEL=1</p> <p>Default: STRUCTURE_LEVEL=0 (is used if STRUCTURE_LEVEL is not defined in CUSTOM_PAR)</p> <p>2. PREVIEWPICTURECONVERTFORMAT</p> <p>Possible values: JPEG,GIF,PNG</p> <p><i>Example:</i> PREVIEWPICTURECONVERTFORMAT=JPEG</p> <p>Default: If no or an incorrect value is defined in CUSTOM_PAR, a JPEG is created.</p> <p><i>Example for combined values:</i> STRUCTURE_LEVEL=1; PREVIEWPICTURECONVERTFORMAT=JPEG</p>

Table 8: Save options

DOC_TYPE	TYPE	Comment
DRAWING or 3D_MODEL	SAVE	Assembly/drawing is saved to Agile PLM without children.
	SAVE2	Assembly/drawing is saved to Agile PLM with children.

Table 9: Others

DOC_TYPE	TYPE	CUSTOM_PAR	Comment
3D_MODEL or DRAWING	EXPORT		Exports root element without drawings.
		EXPORT_DRAWINGS=1	Exports root element with all drawings of root element and children.
		EXPORT_DRAWINGS=0	Exports root element without drawings.
		EXPORT_DRAWINGS=1; EXPORT_ALL_DRAWINGS=0	Exports root element with drawings of the root element.

DOC_TYPE	TYPE	CUSTOM_PAR	Comment
	REFILE		Parts, assemblies or drawings are loaded completely. Every file opens individually, saved locally and completely saved back to Agile PLM (update relations is switched off during the save process). Finally the files are migrated.
		TOPLEVELONLY=1	Only the top element is migrated.
		RenamingOnLoad=1	If set to 1, renaming is switched on. Renaming is deactivated by default.
		LoadInCacheMode=1	If set to 1, cache during load is switched on. It is deactivated by default.

1.2.4.3 Siemens Solid Edge

Table 10: Jobs for drawings

DOC_TYPE	TYPE
DRAWING	PDF
	TIF
	DXF

Table 11: Jobs for parts and assemblies

DOC_TYPE	TYPE	CUSTOM_PAR
3D_MODEL	PDF	
	3DPDF	
	TIF	
	JT	
	STEP	
	STL	
	IGS	

DOC_TYPE	TYPE	CUSTOM_PAR
	BLOB	<p>1. STRUCTURE_LEVEL</p> <p>Possible values:</p> <p>0: complete structure</p> <p>1: Top Element</p> <p>2: up to 1st Level</p> <p>3,4,...:up to 2nd, 3rd,...</p> <p><i>Example:</i> STRUCTURE_LEVEL=1</p> <p>Default: STRUCTURE_LEVEL=0 (is used if STRUCTURE_LEVEL is not defined in CUSTOM_PAR)</p> <p>2. PREVIEWPICTURECONVERTFORMAT</p> <p>Possible values: JPEG,GIF,PNG</p> <p><i>Example:</i> PREVIEWPICTURECONVERTFORMAT=JPEG</p> <p>Default: If no or an incorrect value is defined in CUSTOM_PAR, a JPEG is created.</p> <p><i>Example for combined values:</i> STRUCTURE_LEVEL=1; PREVIEWPICTURECONVERTFORMAT=JPEG</p>

Table 12: Save options

DOC_TYPE	TYPE	CUSTOM_PAR	Comment
DRAWING or 3D_MODEL	SAVE		Assembly/drawing is saved to Agile PLM without children.
	SAVE2		Assembly/drawing is saved to Agile PLM with children.
	SAVECONVERT	[CRE_SYSTEM]	<p>CRE_SYSTEM is defined in XPlmA9<cad>Transaction.xml – transaction <code>ConvertDefinition_<cad></code>.</p> <p>Transactions <code>CadModelPartTemplate</code> and <code>CadModelAssembly</code> must be adapted either.</p>

Table 13: Others

DOC_TYPE	TYPE	CUSTOM_PAR	Comment
3D_MODEL or DRAWING	EXPORT		Exports root element without drawings.

DOC_TYPE	TYPE	CUSTOM_PAR	Comment
		EXPORT_DRAWINGS=1	Exports root element with all drawings of root element and children.
		EXPORT_DRAWINGS=0	Exports root element without drawings.
		EXPORT_DRAWINGS=1; EXPORT_ALL_DRAWINGS=0	Exports root element with drawings of the root element.
	REFILE		Parts, assemblies or drawings are loaded completely. Every file opens individually, saved locally and completely saved back to Agile PLM (update relations is switched off during the save process). Finally the files are migrated.
		TOPLEVELONLY=1	Only the top element is migrated.
		RenamingOnLoad=1	If set to 1, renaming is switched on. Renaming is deactivated by default.
		LoadInCacheMode=1	If set to 1, cache during load is switched on. It is deactivated by default.

1.2.4.4 Dassault SOLIDWORKS

Table 14: Jobs for drawings

DOC_TYPE	TYPE	Comment
DRAWING	PDF	
	SINGLESHEET-PDF	
	TIF	

DOC_TYPE	TYPE	Comment
	DXF	Depending on the Solidworks setting, multiple DXF files are created for the sheets of a drawing, or a single one.

Table 15: Jobs for parts and assemblies

DOC_TYPE	TYPE	CUSTOM_PAR	Comment
	PDF		
	3DPDF		
	TIF		
	JT		
	STEP		
	STL		
	IGS		
	VRML		
	EPRT		3D_MODEL must be a part.
	EASM		3D_MODEL must be an assembly.
3D_MODEL		1. STRUCTURE_LEVEL Possible values: 0: complete structure 1: Top Element 2: up to 1st Level 3,4,...:up to 2nd, 3rd,... <i>Example:</i> STRUCTURE_LEVEL=1 Default: STRUCTURE_LEVEL=0 (is used if STRUCTURE_LEVEL is not defined in CUSTOM_PAR)	
	BLOB	2. PREVIEWPICTURECONVERTFORMAT Possible values: JPEG,GIF,PNG <i>Example:</i> PREVIEWPICTURECONVERTFORMAT=JPEG Default: If no or an incorrect value is defined in CUSTOM_PAR, a JPEG is created. <i>Example for combined values:</i> STRUCTURE_LEVEL=1; PREVIEWPICTURECONVERTFORMAT=JPEG	

Table 16: Save options

DOC_TYPE	TYPE	CUSTOM_PAR	Comment
DRAWING or 3D_MODEL	SAVE		Assembly/drawing is saved to Agile PLM without children.
	SAVE2		Assembly/drawing is saved to Agile PLM with children.
	SAVEASPART	SAVEINTONEWDOCUMENT=TRUE (Default)	Saves part into a new document number.
		SAVEINTONEWDOCUMENT=FALSE	Saves part with the same document number.

Table 17: Others

DOC_TYPE	TYPE	CUSTOM_PAR	Comment	
3D_MODEL or DRAWING	EXPORT		Exports root element without drawings.	
		EXPORT_DRAWINGS=1	Exports root element with all drawings of root element and children.	
		EXPORT_DRAWINGS=0	Exports root element without drawings.	
		EXPORT_DRAWINGS=1; EXPORT_ALL_DRAWINGS=0	Exports root element with drawings of the root element.	
	REFILE			Parts, assemblies or drawings are loaded completely. Every file opens individually, saved locally and completely saved back to Agile PLM (relations are not updated during the save process). Finally the files are migrated.
		TOPLEVELONLY=1	Only the top element is migrated.	
		RenamingOnLoad=1	If set to 1, renaming is switched on. Renaming is deactivated by default.	
		LoadInCacheMode=1	If set to 1, cache during load is switched on. It is deactivated by default.	

1.2.5 Further configurations

XPlmBatchServerUI.exe.config

In this file, stop files and batch specific log directories are specified.

XPlmBatchServerConfig.xml

Name	Description
BatchCadPidFileProceedStucked	If activated (set to 1), in cleanup procedure also old missed PID files are cleaned up before a new worker process starts in Batch Server. Default: 1 Possible values: 0 1

2 Encryption Helper

2.1 Introduction

The Encryption Helper is used to encrypt fields that must not be read in plain text, for example passwords.

Required passwords and other information can be encrypted to avoid the value appearing as plain text in configuration files. This is applicable for most of the configuration files, at least for the login parameters as well as for regular transactions written in the current data model.



Make sure that you keep the original password in a safe place if you want to encrypt it. It is not possible to recover the original value after encryption.

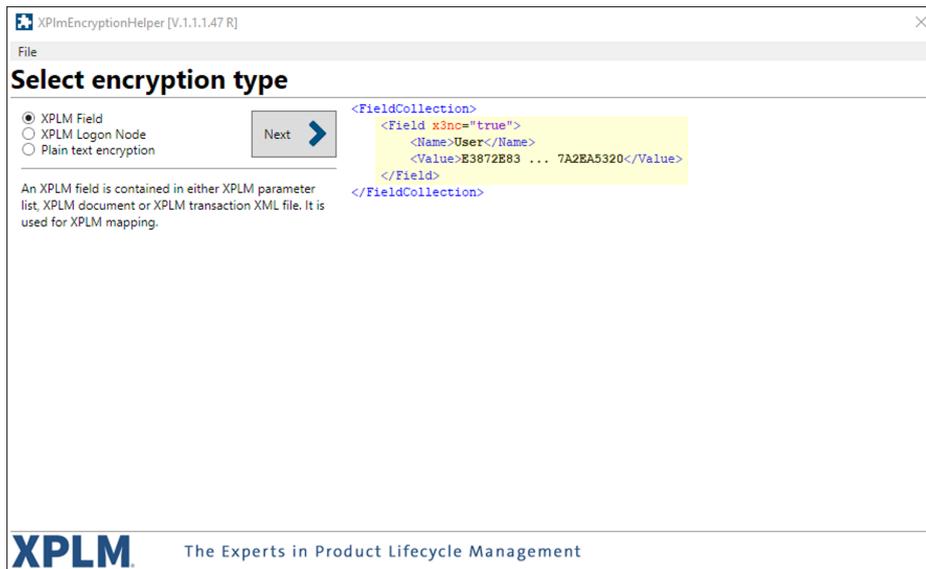


Figure 1: User interface

2.2 Usage

The application is installed from the integration installer in the step *Tool components*. After installation, a shortcut to start the application is placed on the desktop.

About this task

The Encryption Helper can encrypt a defined field, a logon node or just any plain text. It provides examples on how to use the encrypted information.

Procedure

1. Select an encryption type and click **Next**. Click **Back** to select another type.
2. **XPLM Field**: Enter the name of the field and its value, and click **Encrypt**.
3. **XPLM Logon Node**: Enter the name of the field and its value, and click **Encrypt**.
4. **Plain text encryption**: Enter the plain text and click **Encrypt**.

Result

The entered information is encrypted. Click **Copy** to copy the information to the clipboard and use it in the desired file.