Troubleshooting PDM SMTP Email Notifications

SolidWorks PDM Professional can send notifications externally using the Simple Mail Transport Service (SMTP) to users. The SolidWorks PDM Standard version does not have the functionality to send notifications by SMTP, only internally. This guide is for troubleshooting email notifications by email with SolidWorks PDM Professional.

PDM Email Notification Setup Considerations

SolidWorks PDM Professional is designed to work with an onsite email server such as Microsoft Exchange. Companies that are using a cloud-based mail service such as Office 365 will have to set up a relay proxy to work with SolidWorks PDM. Additional information can be found in our compatibility documentation for PDM and Office 365.

PDM Professional Compatible with Office 365 for SMTP Messaging – Hawk Ridge Systems Support

Troubleshooting

What steps can be taken to troubleshoot notification problems with users?

• Verify that the SolidWorks PDM Database service is started on the archive server.



- Check the SQL table **DocumentActionInfo** in Microsoft Server Management Studio to confirm that messages are being processed as stated in next section.
- Use Telnet to send test emails from the PDM archive server and the users system.

Use Telnet to test SMTP communication on Exchange servers | Microsoft Learn

• Test communication and verify that a firewall or SPAM filter is not blocking the emails.

Firewall Ports for PDM – Hawk Ridge Systems Support

• Use the Test Settings button on the SMTP Settings tab in the Message System node.

| General | SMTP Settings | | |
|---------|-----------------|------------------|--------------|
| | Server mailhe | om | |
| | Port 25 | | |
| | Login req | uired | |
| | User | | |
| | Password | | |
| | From Address | SolidWorks_Enter | orise_PDM@ |
| | From Name | SOLIDWORKS PD | M MailServio |
| | Send test mail: | Test Sett | ings |
| | | | |

Database Server Service

Notifications that are created in SolidWorks PDM are placed in the **DocumentActionIntoTable** for processing. The SolidWorks PDM Database Server service will process those notifications. Notifications that are not being processed will accumulate in the **DocumentActionInfoTable**. Restarting the PDM Database Server service will reprocess those notifications. Check the Windows Event Viewer Application log for any errors that may result.

| Event Viewer File Action View Help | | | |
|--|--|---|-----------------------------------|
| 🗢 🔿 🖄 📰 🛛 | | | |
| 🔠 Event Viewer (Local) | Application | Number of events: 41 339 (!) New events available | |
| Custom Views Windows Logs | 🝸 🛛 Filtered: L | .og: Application; Source: SOLIDWORKS PDM Data | base Server. Number of events: 67 |
| Application | Level | Date and Time | Source |
| Security | Error | 03/11/2020 14:38:53 | SOLIDWORKS PDM Database Server |
| Setup | Error | 03/11/2020 14:38:43 | SOLIDWORKS PDM Database Server |
| E Forwarded Events | Error | 03/11/2020 14:38:33 | SOLIDWORKS PDM Database Server |
| Applications and Services Lo | 🕕 Error | 03/11/2020 14:38:23 | SOLIDWORKS PDM Database Server |
| Saved Logs | Information | 02/11/2020 14:20:22 | SOLIDIMORKS DDM Database Server |
| Subscriptions | Event 0, SOLID | WORKS PDM Database Server | |
| | General De | tails | |
| | Connect to Failed: (null) Unknown e (null) | o server 'vm-tiv-pdm' error 0x80040200 | |

The next step is to check the Windows Registry key HKEY_LOCAL_MACHINE\ SOFTWARE\ SolidWorks\ Applications \PDMWorks Enterprise\MailService on the PDM Archive Server. Verify that the correct name of the SQL database server used for the PDM vault is listed in the registry.

| SolidWorks Type Data AddInsStartup AddInsStartup REG_SZ (value not set) AddInsStartup FeatureWorks REG_DWORD 0x00000052 (82) PDMWorks Enterprise FeatureWorks REG_DWORD 0x0000000 (10) PDMWorks Enterprise FeatureWorks REG_BINARY e4 07 0b 00 20 03 00 00 00 00 00 00 01 00 df 03 AchineServer FileFormats REG_DWORD 0x0000000 (0) MailService MailService REG_SZ fbbbb9b-594d-47dc-95a9-ebeb863b8b7f Pasword REG_SZ fbbbb9b-594d-47dc-95a9-ebeb863b8b7f PollInterval REG_SZ fbbbb9b-594d-47dc-95a9-ebeb863b8b7f PollInterval REG_SZ fbbbbb-594d-47dc-95a9-ebeb863b8b7f PollInterval REG_SZ fbbbbbb-594d-47dc-95a9-ebeb863b8b7f PollInterval REG_SZ fbbbbbb-594d-47dc-95a9-ebeb863b8b7f PollInterval REG_SZ sa | 👫 Registry Editor ïle Edit View Favorites Help | | | | |
|---|---|---|---|---|--|
| SUIDWORKS DXF3D V C | SolidWorks AddIns AddInsStartup Applications FeatureWorks PDMWorks Enterprise ArchiveServer FileFormats MailPlugins MailService Namespace SldTrans 1.0 | ^ | Name (Default) ErpExportSerialNumber EventPollInterval Language LastDeadlineCheck LastStatusDeadlineCh LastStatusDeadlineCh Log LogNotifInfo Password PollInterval LastServer | Type REG_SZ REG_QWORD REG_DWORD REG_SZ REG_BINARY REG_BINARY REG_DWORD REG_DWORD REG_SZ REG_DWORD REG_SZ | Data (value not set) 0x00000052 (82) 0x0000000a (10) GB e4 07 0b 00 02 00 03 00 00 00 00 00 01 00 df 03 e4 07 0b 00 02 00 03 00 0c 00 06 00 16 00 00 00 0x00000000 (0) fb0b8b9b-594d-47dc-95a9-ebeb863b8b7f 0x0000003c (60) vm-tiv-pdm |
| | Solidworks DXF3D | * | <u>مل</u>)User ۲ | REG_SZ | sa |

The Database name can be verified within the PDM administration tool. Open the PDM administration tool and log in as administrator. Right-click the PDM vault name and select properties.



The Database server and Database name will be listed within the file vault properties window.

| | Database name: | TestPDM | | | |
|--|---|--|---|---|--|
| | Database server: | 1 | | | |
| | Local folder: C:\TestPDM\ | | | | |
| | Archive version: 9.0 | | | | |
| | Vault ID: | {FFA86A14-8 | E3E-45CB-97 | 790-945F072B0CBB} | |
| | Vault Type: | SOLIDWORKS | PDM Profes | sional | |
| | Date format: | 12/31/1999 | | | |
| | Block status: | Log-ins are pe | ermitted | | |
| | Block Log-ins Permit Log-ins | | | | |
| | Block L | og-ins | | Permit Log-ins | |
| escriptio | Block L | og-ins | | Permit Log-ins | |
| escriptio <refres< th=""><th>Block L on: h to see value > Updates:</th><th>og-ins</th><th></th><th>Permit Log-ins</th><th></th></refres<> | Block L on: h to see value > Updates: | og-ins | | Permit Log-ins | |
| escriptio <refres Installed I</refres | Block L n: h to see value > Updates: Update | og-ins | Version | Permit Log-ins | |
| escriptio <refres installed I Index 3 1</refres | Block L n: h to see value> Updates: Update StoredProcsRegist | og-ins | Version 29.4 | Permit Log-ins Date 9/21/2021 6:43:20 | |
| escriptic <refres Installed I Index 1 2</refres | Block L Difference of the set of | og-ins er 2021092 er 2022020 | Version 29.4 29.4 | Permit Log-ins Date 9/21/2021 6:43:20 2/8/2022 7:26:05 PM | |
| escriptic <refres< td=""><td>Block L Block L Difference See Value > Updates: Updates: Update StoredProcsRegist StoredProcsRegist StoredProcsRegist</td><td>er 2021092 ter 2022020 ter 2022020</td><td>Version 29.4 29.4 30.0</td><td>Permit Log-ins Date 9/21/2021 6:43:20 2/8/2022 7:26:05 PM 2/8/2022 7:26:14 PM</td><td></td></refres<> | Block L Block L Difference See Value > Updates: Updates: Update StoredProcsRegist StoredProcsRegist StoredProcsRegist | er 2021092 ter 2022020 ter 2022020 | Version 29.4 29.4 30.0 | Permit Log-ins Date 9/21/2021 6:43:20 2/8/2022 7:26:05 PM 2/8/2022 7:26:14 PM | |
| escriptio | Block L Block L Difference Block L Block L Block L Block L Block L Block L Block L Block L Difference Block | er 2021092 ter 2022020 ter 2022020 29.4 to 30.0 | Version 29.4 29.4 30.0 30.0 | Permit Log-ins Date 9/21/2021 6:43:20 2/8/2022 7:26:05 PM 2/8/2022 7:26:14 PM 2/8/2022 7:26:14 PM | |

Verify the PDM Vault SQL Login Credentials

If the SQL user account password has been lost, then follow the document on how to reset the SQL account password using the Microsoft SSMS tool otherwise proceed to the next steps.

https://support.hawkridgesys.com/hc/en-us/articles/360033470232-How-To-Use-SQL-Server-Management-Studio-SSMS-To-Reset-Your-SQL-Password

Verifying the SQL account used for the PDM vault is recommended since using an incorrect password will cause notifications to stop working with PDM along with login issues. Checking the login account can be done by selecting the PDM Archive Server icon from the Windows Start Menu on the server.



Click on the PDM vault icon within the Archive Server Configuration tool and select properties. Select the Login tab and check if the 'use default SQL login' option is selected. If the default SQL login option is selected, then click cancel.



If the option 'use default SQL login' is unchecked, then click the change button.



Take note of what **SQL user login** account is listed. SolidWorks PDM uses the default SQL user account. Do not make any changes as this is just to confirm the account used.

| Change SQL User Login | ? | \times |
|---|-------------------|----------------|
| Enter username and password of an SQ least "db_owner" access to the SOLIDV databases. | L user w VORKS | iith at PDM |
| SQL user login: | | |
| sa | | |
| Password: | | |
| | | |
| Confirm password: | | |
| | | |
| ОК | Cano | el |

How to verify the Default SQL Login for the PDM Archive Server

From the Windows Start Menu select the SolidWorks PDM Folder and then Archive Server Configuration icon.



Select the Tools menu and then default settings from the drop-down menu.



Click the login tab and then click the 'Change' Button for the SQL login.

| Default Settings | ? | \times |
|--|----------------|----------|
| Login Security Refresh interval | | |
| Default login type | | |
| SOLIDWORKS PDM login Windows login Automatic login Allow SOLIDWORKS PDM login LDAP login | Settings | |
| Admin user | lucus quists i | |
| SOLIDWORKS PDM file vault. Click here to change the password for the default "Admin" user login. | iways exists i | na |
| | Password. | |
| _ SQL login | | |
| The SQL login is used when SOLIDWORKS PDM clients communicate with t databases. Click here to change the default SQL login information. | he file vault | |
| | Change | |
| | | |

Do not change the SQL password, just take note of the database password account used. After the account has been verified click cancel to close the account window.

| Change SQL User Login | | ? | \times |
|---|---------------------|----------------------|------------|
| Enter username and password o least "db_owner" access to the databases. | f an SQL SOLIDW(| user witł DRKS Pl | n at DM |
| SQL user login: | | | |
| sa | | | |
| Password: | | | |
| | | | |
| Confirm password: | | | |
| | | | |
| OK | | Cancel | |

The next step is to verify the correct password is used for the SQL account. Open Microsoft SQL Server Management Studio (SMSS) if installed on the server or another machine. Using the password from the SQL account listed in the Archive Server tool login. Proceed to the next section about updating the SQL Database Service Login.

Updating the PDM Database Service SQL Login

Start the PDM Database Server configuration from the Windows Start Menu.



Enter the current SQL account password and then click the 'OK' button.

| SOLIDWORKS | S PDM Database Server | ? | \times |
|----------------|--|-------|----------|
| SQL-Server Con | nection | | |
| User: | sa | | |
| Password: | ••••• | | |
| | | | |
| Seconds to wa | it until file vault databases are processed: | 60 | • |
| | Language: 🔣 🛣 English | | \sim |
| | ОК | Cance | ; |

Restart the SolidWorks PDM Database under Windows Services console.



Verify that PDM users can now receive PDM notifications in their inbox without further issues.

| 🛃 SOLIDWORKS PDM Inbox - Test | PDM | | | | | |
|--|----------|------|---------|---|------|---|
| File Edit View Help | | | | | | |
| 🖂 🗩 🕅 🖙 🕶 🕅 🕅 | <u>a</u> | | | | | |
| File vaults | From | Туре | Subject | | Date | V |
| Æ TestPDM | | | | <there are="" in="" items="" no="" this="" view=""></there> | | |
| ② Task Notifications 置 Text Messages 翁 Upgrade Tool Notificatior | | | | | | |
| | | | | | | |
| < > | | | | | | |