

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

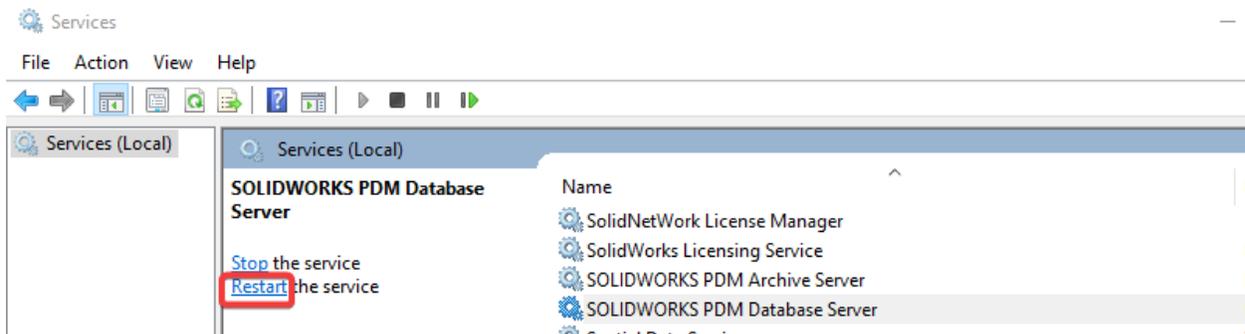
SolidWorks PDM Professional is designed to work with an onsite email server such as Microsoft Exchange. Companies that are using a cloud-based mail service such as Office 365 will have to set up a relay proxy to work with SolidWorks PDM. Additional information can be found in our compatibility documentation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



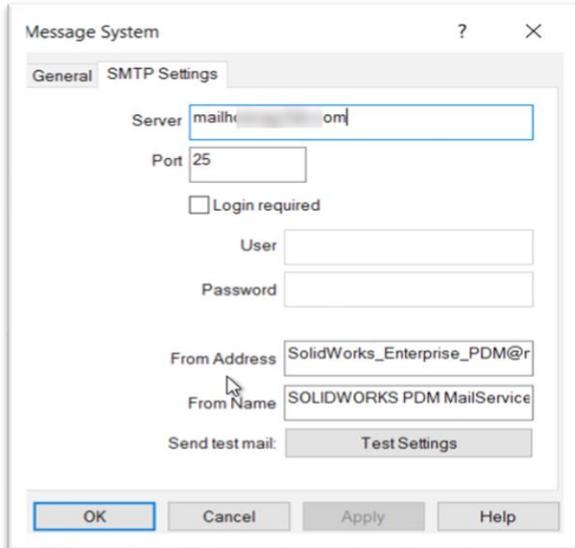
- Check the SQL table **DocumentActionInfo** in Microsoft Server Management Studio to confirm that messages are being processed as stated in next section.
- Use Telnet to send test emails from the PDM archive server and the users system.

[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.

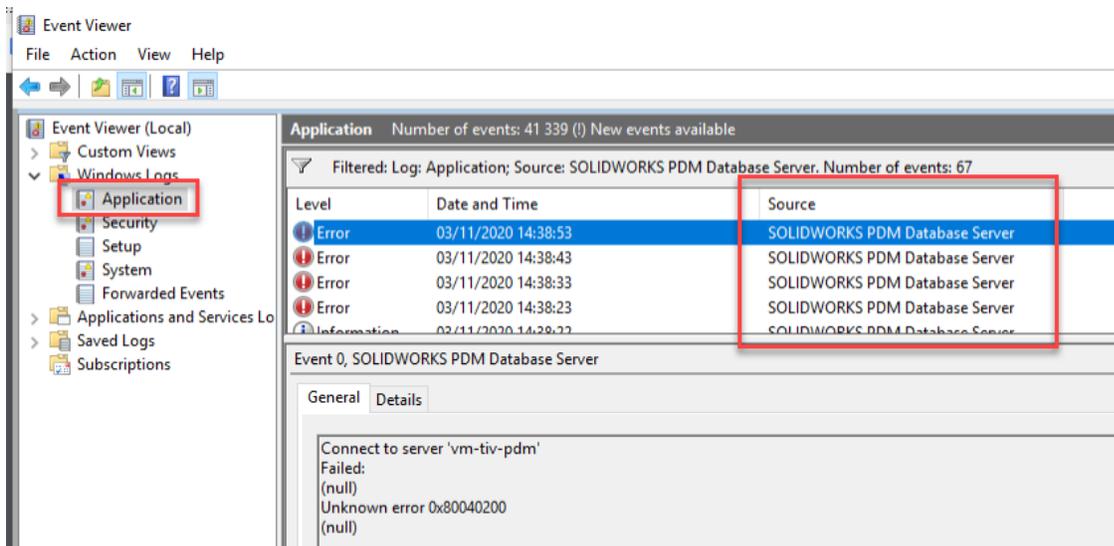
[Firewall Ports for PDM – Hawk Ridge Systems Support](#)

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

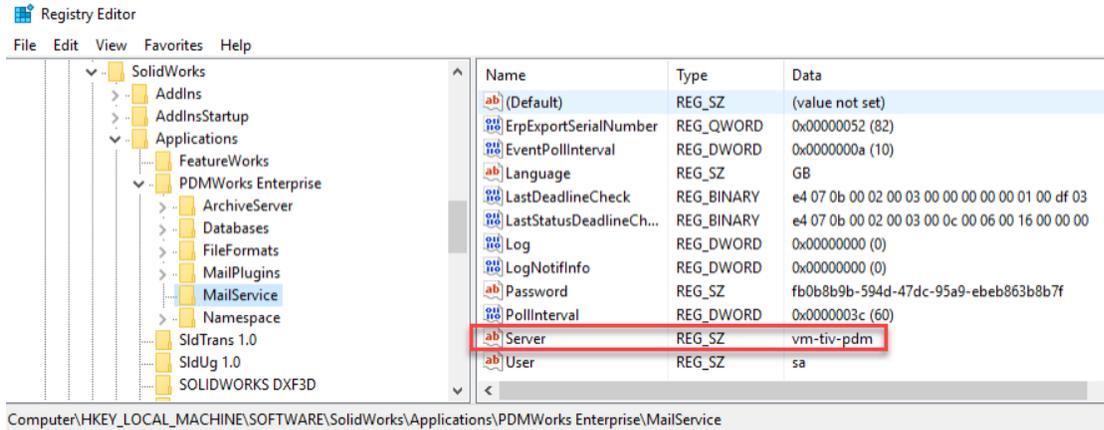


Database Server Service

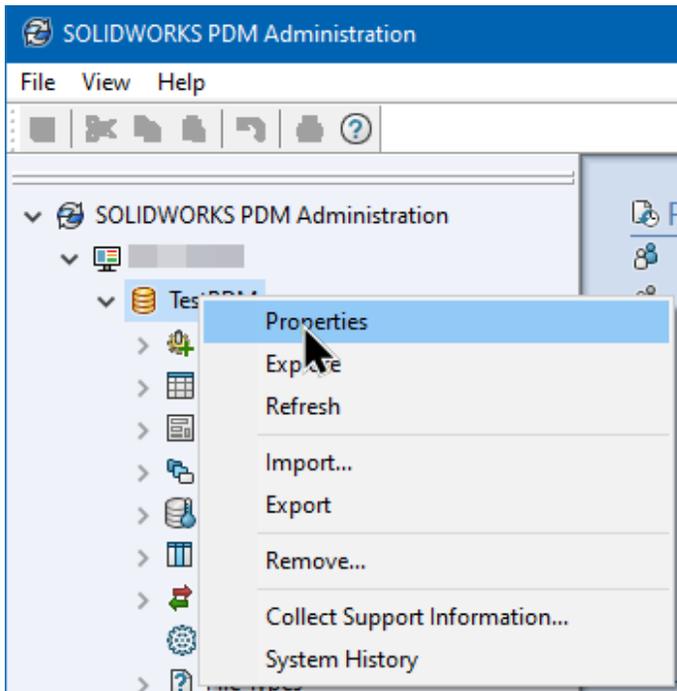
Notifications that are created in SolidWorks PDM are placed in the **DocumentActionInfoTable** for processing. The SolidWorks PDM Database Server service will process those notifications. Notifications that are not being processed will accumulate in the **DocumentActionInfoTable**. Restarting the PDM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



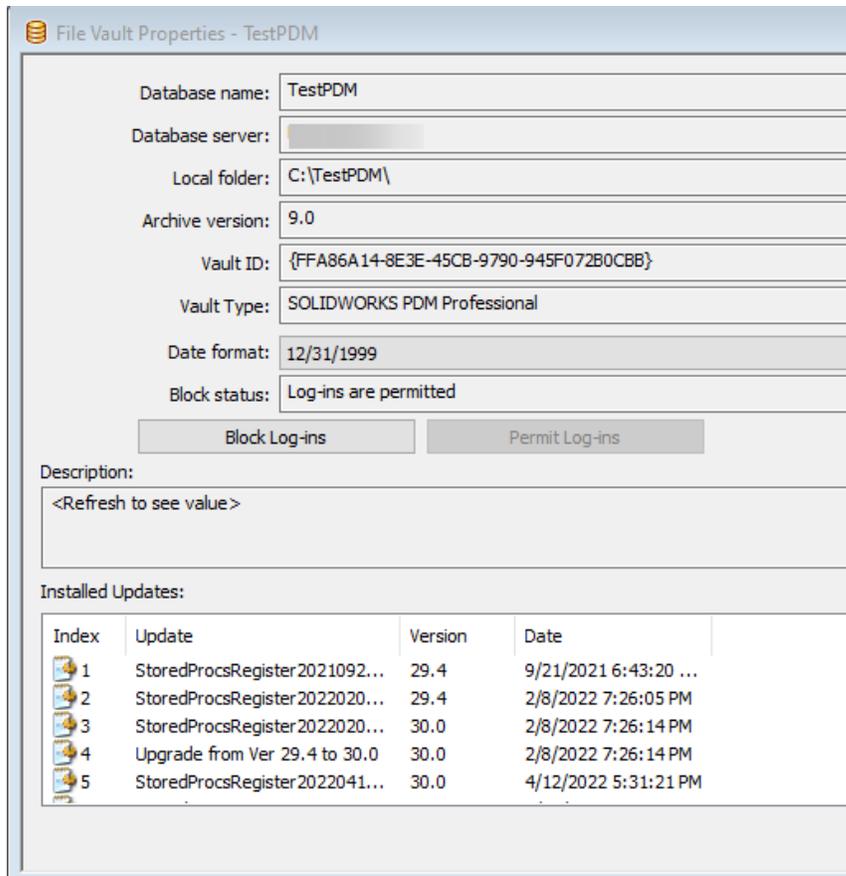
The next step is to check the Windows Registry key HKEY_LOCAL_MACHINE\SOFTWARE\SolidWorks\Applications\PDMWorks Enterprise\MailService on the PDM Archive Server. Verify that the correct name of the SQL database server used for the PDM vault is listed in the registry.



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.

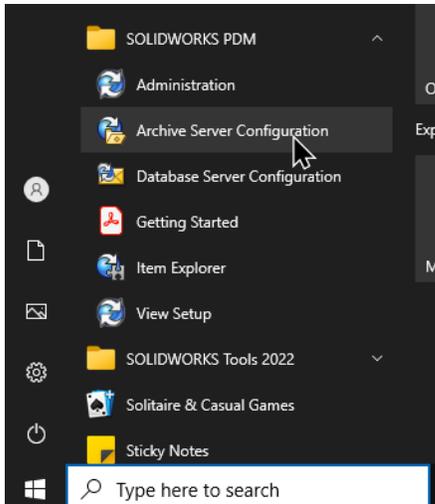


Verify the PDM Vault SQL Login Credentials

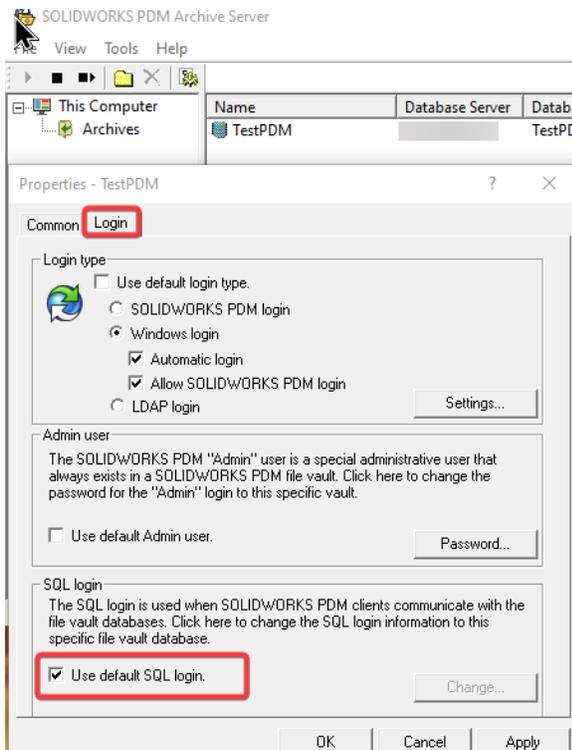
If the SQL user account password has been lost, then follow the document on how to reset the SQL account password using the Microsoft SSMS tool otherwise proceed to the next steps.

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

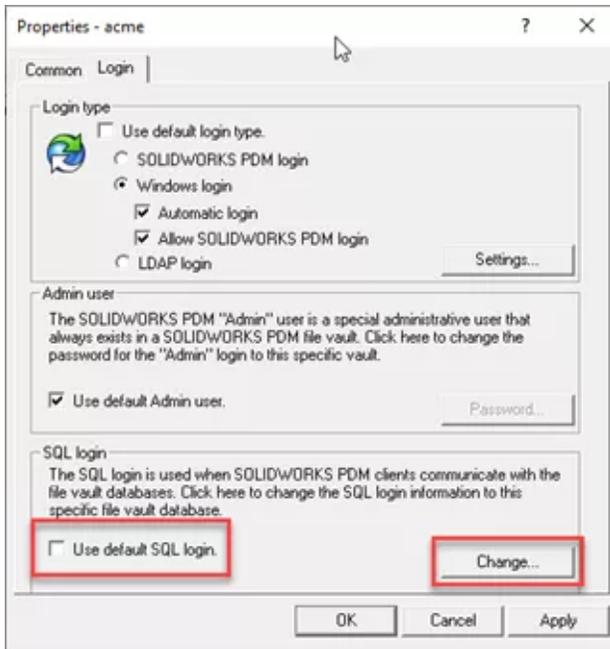
Verifying the SQL account used for the PDM vault is recommended since using an incorrect password will cause notifications to stop working with PDM along with login issues. Checking the login account can be done by selecting the PDM Archive Server icon from the Windows Start Menu on the server.



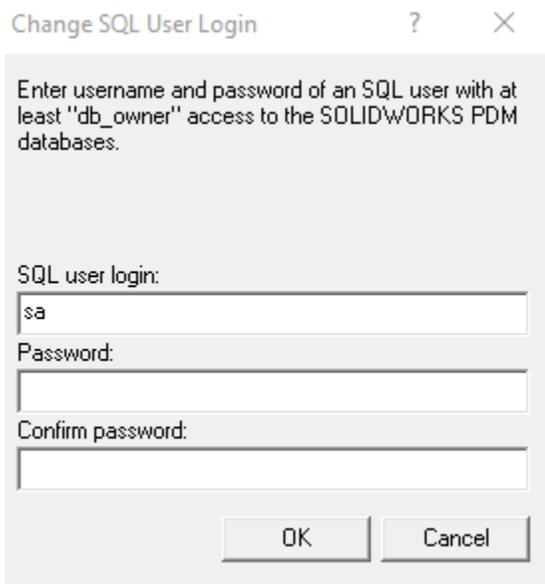
Click on the PDM vault icon within the Archive Server Configuration tool and select properties. Select the Login tab and check if the 'use default SQL login' option is selected. If the default SQL login option is selected, then click cancel.



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

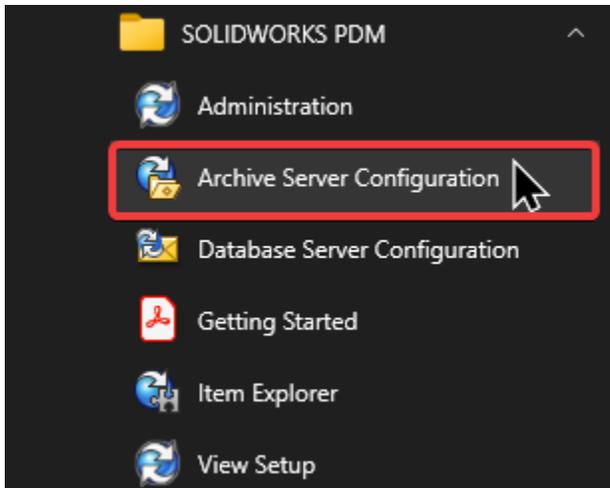


Take note of what **SQL user login** account is listed. SolidWorks PDM uses the default SQL user account. Do not make any changes as this is just to confirm the account used.

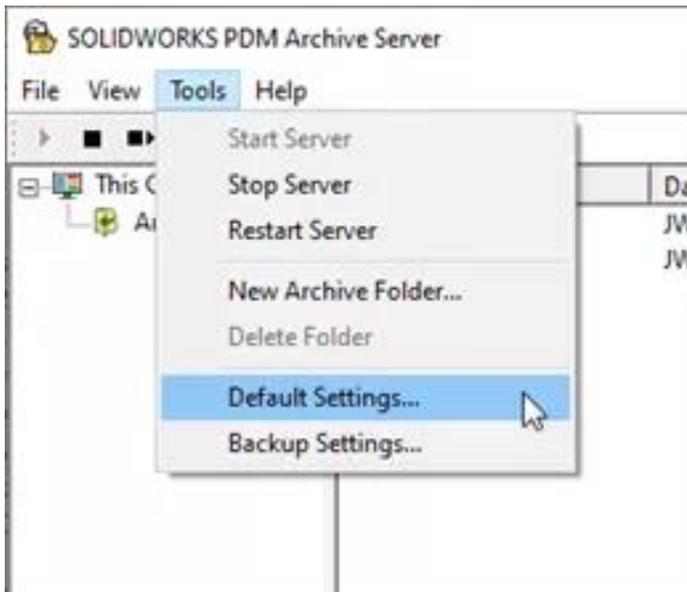


How to verify the Default SQL Login for the PDM Archive Server

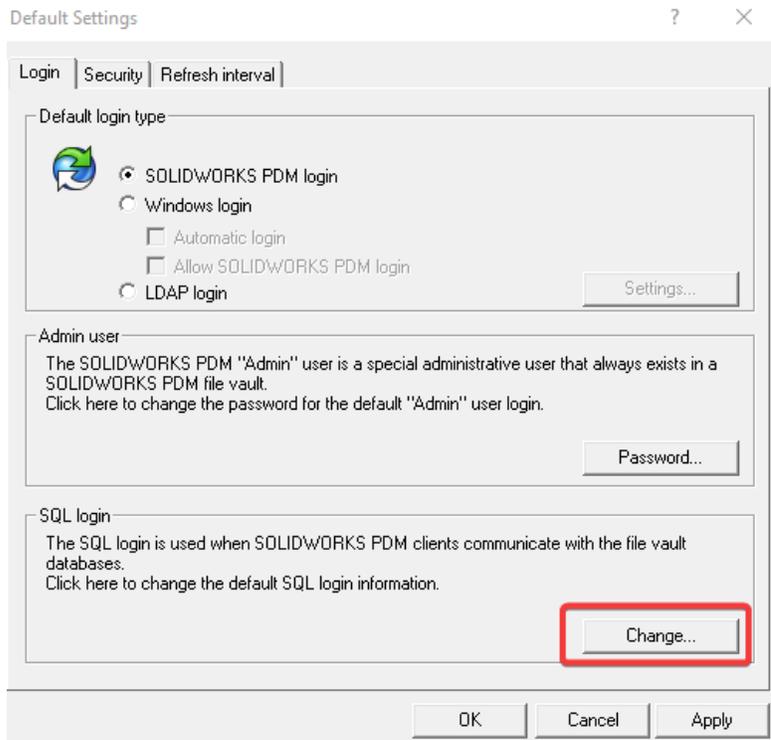
From the Windows Start Menu select the SolidWorks PDM Folder and then Archive Server Configuration icon.



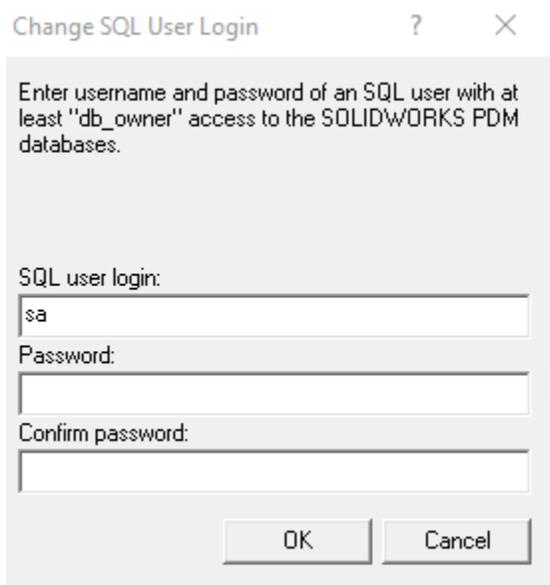
Select the Tools menu and then default settings from the drop-down menu.



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



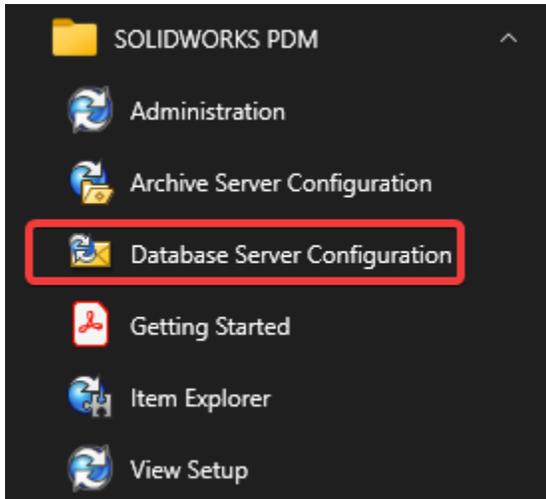
Do not change the SQL password, just take note of the database password account used. After the account has been verified click cancel to close the account window.



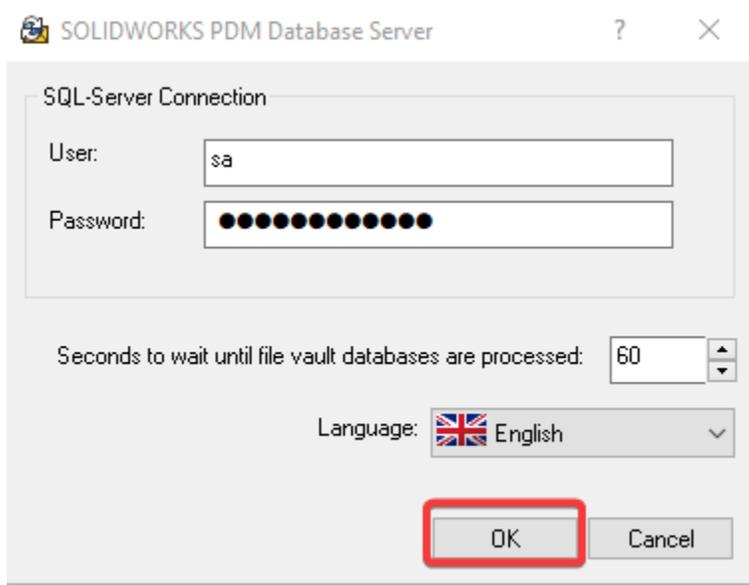
The next step is to verify the correct password is used for the SQL account. Open Microsoft SQL Server Management Studio (SMSS) if installed on the server or another machine. Using the password from the SQL account listed in the Archive Server tool login. Proceed to the next section about updating the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

Updating the PDM Database Service SQL Login

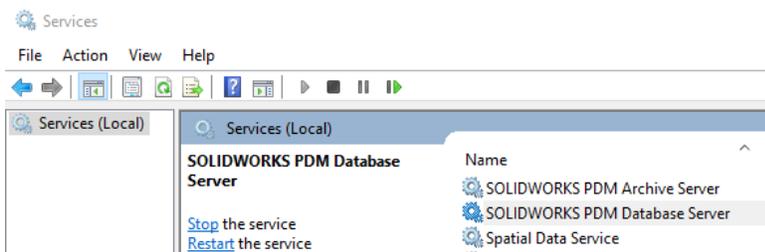
Start the PDM Database Server configuration from the Windows Start Menu.



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



Restart the SolidWorks PDM Database under Windows Services console.



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

