Secude

HaloCAD

HaloCAD for SOLIDWORKS PDM

Installation Manual

Version 2.0

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Contact

Secude Solutions AG

Murbacherstrasse 19

6003 Luzern, Switzerland

Mail: info@secude.com

Support

Web: https://support.secude.com

Mail: support@secude.com

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Typographic Conventions

This guide uses the following typographic conventions to distinguish types of in-text information and icons to alert you to important information.

Convention	Description
Boldface type	• Items you must select, such as menu options, command buttons, or items in a list. • Titles of sections, sub-sections, etc.
Italic type	• To emphasize a word • Error messages • Table and Figure captions
`Consolas Font`	• Package names • Filenames and directory names • XML element names and attribute names • Parameters • File type • Code examples Example: `hesadm.exe start -user <domain\user> -pwd <password>`
Hyperlink	Provides quick and easy access to cross-referenced topics. Hyperlinks are highlighted in blue and underlined.
Admonitions	Note Provides additional information relevant to the topic. Warning Contains information about circumstances, parameters, and so on that MUST be fulfilled. Failure to comply will have consequences for the current operation. Tip Contains useful information about the operation of the application. Info Contains information, guidelines, or suggestions for performing tasks more effectively.

1. Introduction

Companies in industries such as automotive, aviation, and high-tech create and manage intellectual property (IP) using engineering drawings. These drawings are created digitally using computer-aided design (CAD) applications and are often shared with external users for business collaboration. It is important to understand the risks associated with sharing business information. Protecting sensitive engineering data requires comprehensive security measures. HaloCAD is a data protection solution that helps organizations protect sensitive engineering data.

2. How HaloCAD for SOLIDWORKS PDM Protects Data

HaloCAD for SOLIDWORKS Product Data Management (PDM) integrates with the SOLIDWORKS PDM application and includes the features of HaloCAD PROTECT and HaloCAD MONITOR. It uses Microsoft Purview Information Protection (MPIP), formerly Microsoft Information Protection (MIP), to provide Enterprise Digital Rights Management (EDRM) capabilities.

HaloCAD monitors files in SOLIDWORKS PDM folders. When a user cuts or copies a file from a SOLIDWORKS PDM folder to a location outside SOLIDWORKS PDM, HaloCAD intercepts the operation and protects the file in the background before it reaches the destination folder. If a previously protected SOLIDWORKS or PDF file is copied into a SOLIDWORKS PDM folder, HaloCAD decrypts the file and stores the unprotected file in the SOLIDWORKS PDM vault. This helps protect sensitive data when files are shared outside the SOLIDWORKS PDM environment. HaloCAD continuously monitors and logs all cut and copy operations for auditing purposes.

2.1. About this Manual

This manual describes the installation and configuration procedures specific to HaloCAD for SOLIDWORKS PDM.

Reference

Before proceeding with the instructions in this manual, administrators should:

1. Review the Technical Reference Manual to understand the HaloCAD architecture and prerequisites.
2. Review the Release Notes to verify the supported CAD applications.

2.2. Reference Manuals

The following table describes the HaloCAD documentation set and the information available in each manual.

For information on	Refer to
Step 1: Verify the supported operating systems, file types, and CAD applications.	`HaloCAD_SOLIDWORKSPDM_ReleaseNotes_EN_Online.pdf`
Step 2: Review the prerequisites before installation, including: • Registering an Application in Microsoft Entra ID - Public client/native • HaloCAD Architecture • Office 365 Subscription Details • Recommended URLs, Addresses, and Ports for MPIP • Enable Support for TLS 1.2 at the Client Workstation for Microsoft Entra ID	`HaloCAD_Technical_Reference_Manual_EN_Online.pdf`
Step 3: Install the HaloCAD Add-on for SOLIDWORKS.	`HaloCAD_SOLIDWORKS_Manual_Installation_EN_Online.pdf`
Step 4: Install and configure HaloENGINE GenNXT.	`HaloENGINEGenNXT_Manual_Installation_EN_Online.pdf`
Step 5: Install and configure HaloCAD for SOLIDWORKS PDM.	`Refer to the current manual.`
Step 6: Understand the protection and decryption workflow.	`HaloCAD_SOLIDWORKSPDM_Manual_Operations_EN_Online.pdf`

HaloCAD reference documentation

2.3. Component Functions

The following components are involved in the HaloCAD architecture when deployed in an integrated environment:

1. HaloCAD Add-on for SOLIDWORKS
2. HaloCAD for SOLIDWORKS PDM
3. HaloENGINE GenNXT
4. Microsoft Purview Information Protection

The following sections describe the functions of each component.

HaloCAD Add-on for SOLIDWORKS

- Operates within the Dassault Systèmes SOLIDWORKS application.
- Responsible for protecting newly created files that are exported or saved to non-SOLIDWORKS PDM folders and displaying the permission label with enforcement.
- Logs all add-on related activities for auditing purposes.

HaloCAD for SOLIDWORKS PDM

- Resides on the server hosting the SOLIDWORKS PDM Client.
- Watches user-initiated cut, copy, paste, and send-to events in Windows File Explorer (`explorer.exe`).
- Collects metadata for the selected file.
- Obtains action and label information for the selected file from HaloENGINE GenNXT.
- Responsible for labeling and encrypting files.
- Logs HaloCAD for SOLIDWORKS PDM component activities to the local log and sends monitor logs to HaloENGINE GenNXT.

HaloENGINE GenNXT performs the following functions:

- Is a Java-based server component that exposes a web service to HaloCAD for SOLIDWORKS PDM.
- Connects to Microsoft Purview Information Protection to download sensitivity labels and make them available for configuration.
- Implements business logic.
- Logs events received from HaloCAD for SOLIDWORKS PDM.

Microsoft Purview Information Protection

HaloCAD integrates with Microsoft Purview Information Protection to protect sensitive documents. Microsoft Purview Information Protection is an enterprise document security solution that ensures only authorized users can open protected content while controlling the actions they can perform, such as printing, editing, or saving. Even if sensitive data is accidentally or maliciously disclosed, unauthorized users cannot view the content in clear text.

Microsoft documentation

This manual assumes that Microsoft Purview Information Protection is already configured and that you are familiar with the Microsoft Entra admin center and related concepts. If you are new to Microsoft Purview Information Protection, refer to the Microsoft documentation for setup and configuration instructions.

3. Requirements

The following table lists the system requirements for installing and running SOLIDWORKS PDM.

Components	Details
Supported Operating System	Windows Server 2022 and above with updates installed.
Supported file types	`.sldprt`, `.sldasm`, `.prt`, `.asm`, `.slddrw`, `.x_t`, `.tif`, `.dwg`, and `.dxf`
Other components	HaloENGINE GenNXT

Requirements

4. Installing the HaloCAD for SOLIDWORKS PDM

This chapter walks through the process of installing and configuring the HaloCAD for SOLIDWORKS PDM.

4.1. Before you begin

Before installing HaloCAD for SOLIDWORKS PDM, ensure that the following prerequisites are met.

1. Ensure that you have administrative access to install HaloCAD for SOLIDWORKS PDM.
2. Ensure that the client computer running HaloCAD for SOLIDWORKS PDM can connect to the SOLIDWORKS PDM Server.
3. Ensure that the machine with HaloENGINE GenNXT installed can reach the machine where HaloCAD for SOLIDWORKS PDM is installed.
4. Ensure that your HaloENGINE GenNXT meets the requirements listed below:
   a. License file (enabled with SOLIDWORKS_PDM client type).
   b. Proper action rules
   c. Ensure that an authentication approach is selected for HaloENGINE GenNXT and HaloCAD for SOLIDWORKS PDM: **Self-Signed Certificate** or **CA-Signed Certificate**.
      i. For a **Self-Signed Certificate**, export the public key of the HaloENGINE GenNXT server's self-signed certificate and install it in **Trusted Root Certification Authorities** on the system where HaloCAD for SOLIDWORKS PDM is installed.
      ii. For a **CA-signed certificate**, install the **Root CA certificate** in **Trusted Root Certification Authorities** on the system where HaloCAD for SOLIDWORKS PDM is installed. If an intermediate CA is used, ensure that the **intermediate CA certificate** is also available on the client system to validate the certificate chain.
5. Ensure that HaloCAD for SOLIDWORKS PDM and HaloENGINE GenNXT are installed with the same Directory (Tenant) ID. A mismatch in the Directory (Tenant) ID causes configuration errors.
6. Ensure that your Microsoft Entra ID application information is available when the setup process prompts for a manual installation. Alternatively, for a safe and automatic installation, use `hc.conf.enc`. For more details, please refer to the Technical Reference Manual.

4.2. Installation Modes

HaloCAD for SOLIDWORKS PDM supports the following installation modes:

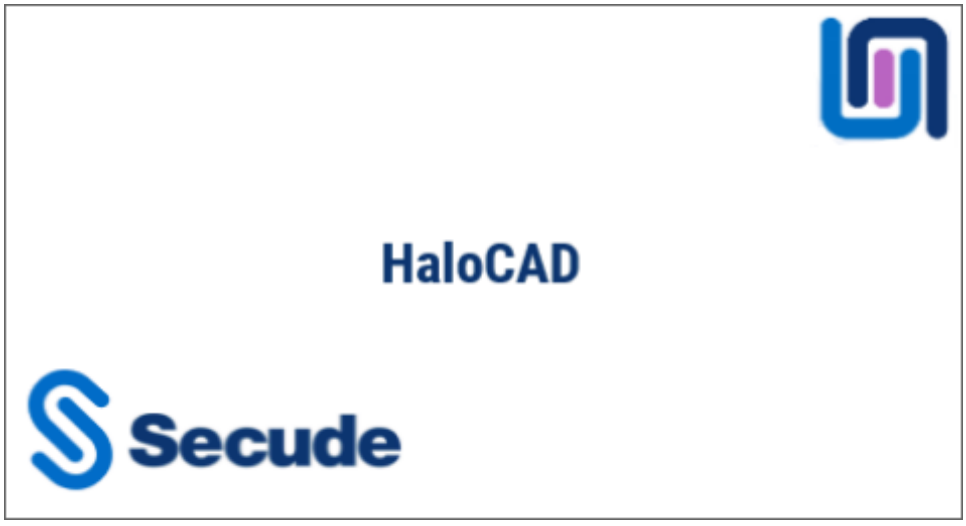
1. **Graphical Mode**
   Graphical mode is an interactive installation method that uses a wizard-based graphical user interface.
2. **Silent Mode**
   Silent mode is a non-interactive installation method that installs HaloCAD for SOLIDWORKS PDM by using command-line options.

4.2.1. Graphical Mode

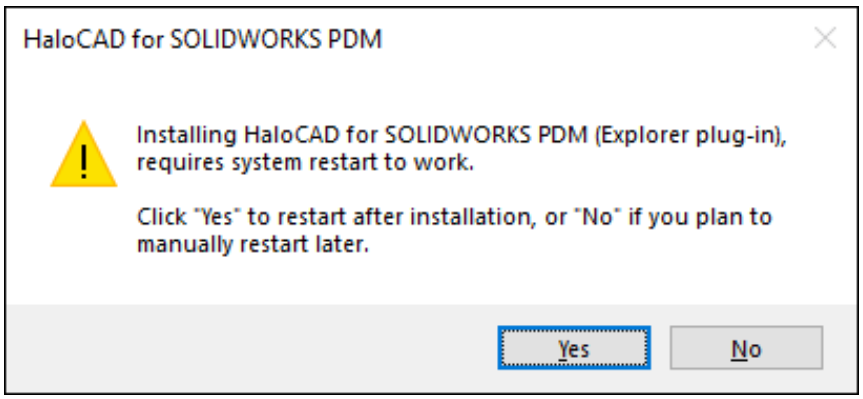
Installation Procedure

Follow the steps below to install SOLIDWORKS PDM using the GUI-based setup application included in the installation package.

1. To begin the interactive installation, double-click the `HaloCAD_SWPDM_Setup.exe` installer.
   Depending on your Windows security settings, a security warning similar to *"Do you want to allow the following program to make changes to this computer?"* may appear. If prompted, click **Yes** to continue the installation.
2. When the installer starts, the **Startup** dialog appears, followed by the restart prompt.



Startup dialog

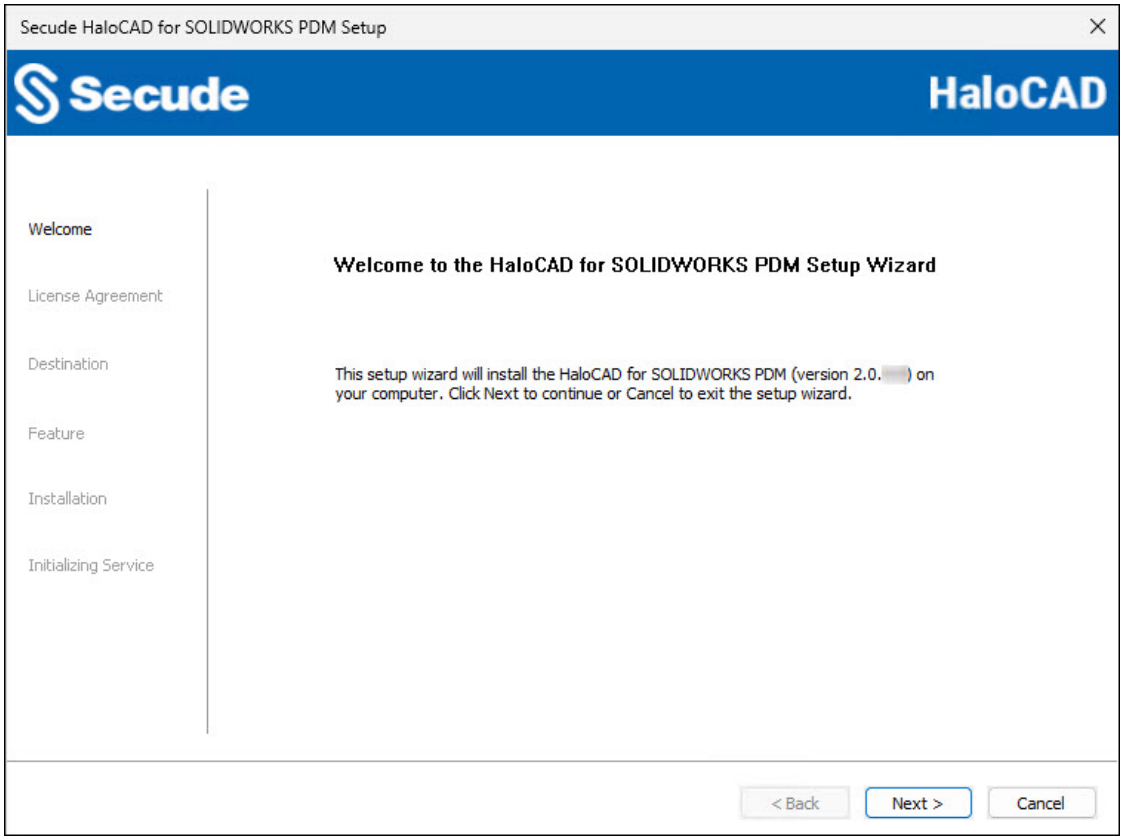


Restart message

3. To activate the HaloCAD component (Explorer plug-in), you must restart your computer after installation. When prompted, choose one of the following options:
   a. **Yes** – The computer restarts automatically after the HaloCAD component is installed.
   b. **No** – The HaloCAD component is installed, but the computer must be restarted manually later.

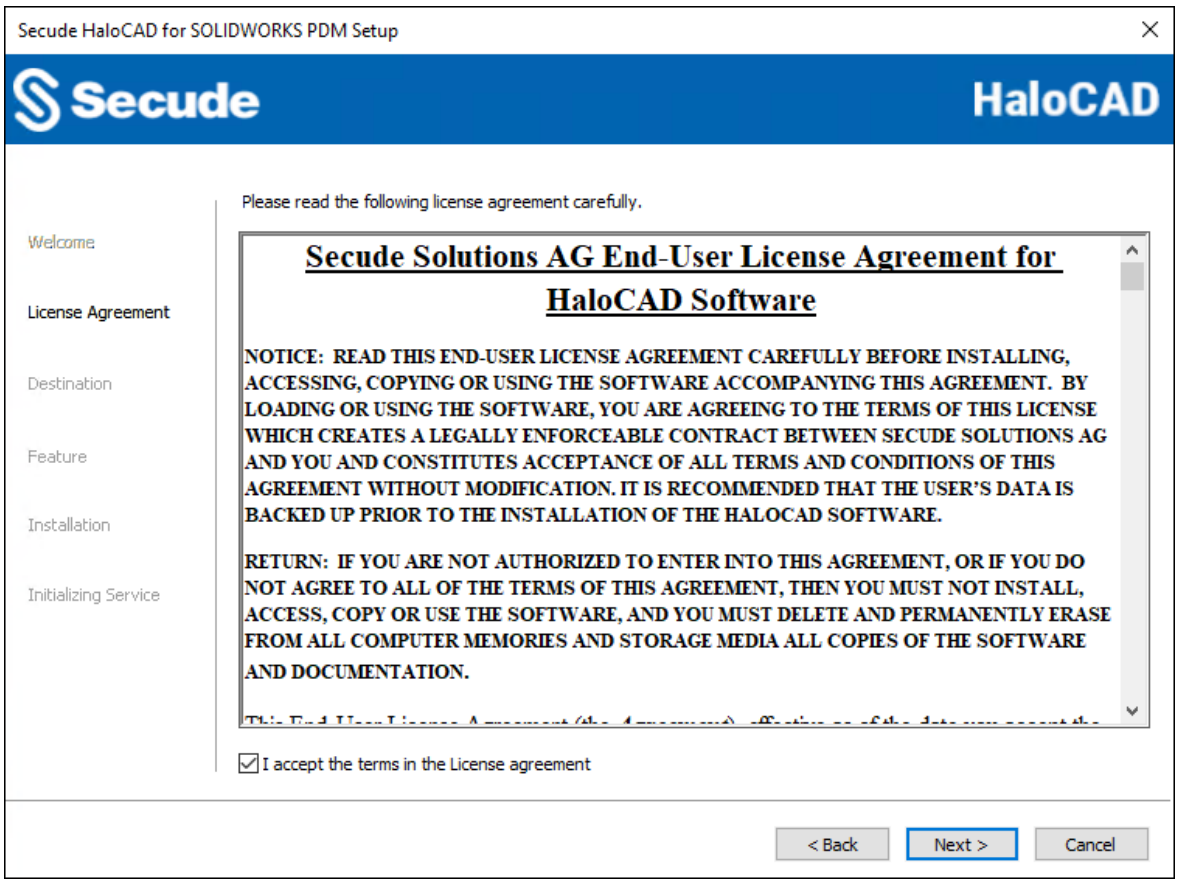
   Note: The HaloCAD component becomes active only after the system is restarted.

4. After choosing an option in the restart prompt, the **Welcome** dialog appears.



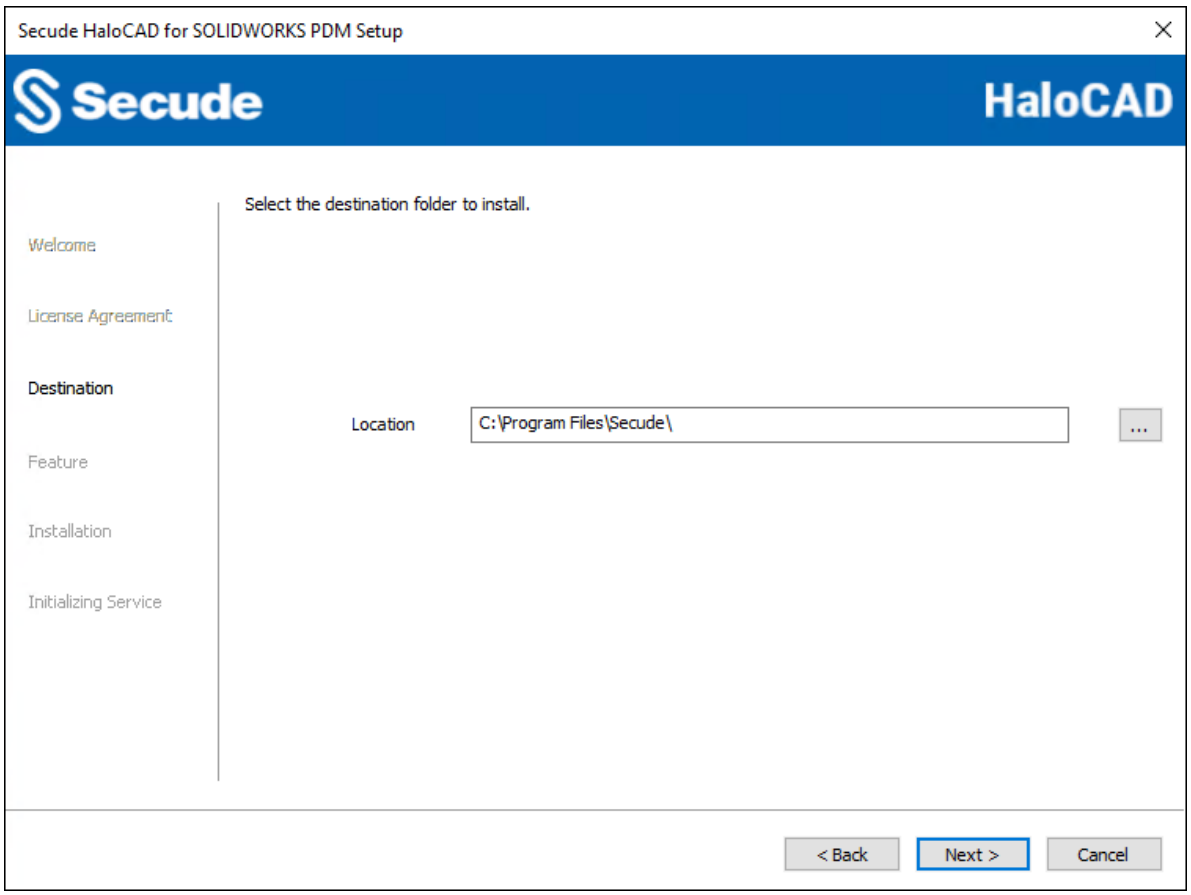
Welcome dialog

5. Click **Next** to continue.
6. The **License Agreement** dialog appears.



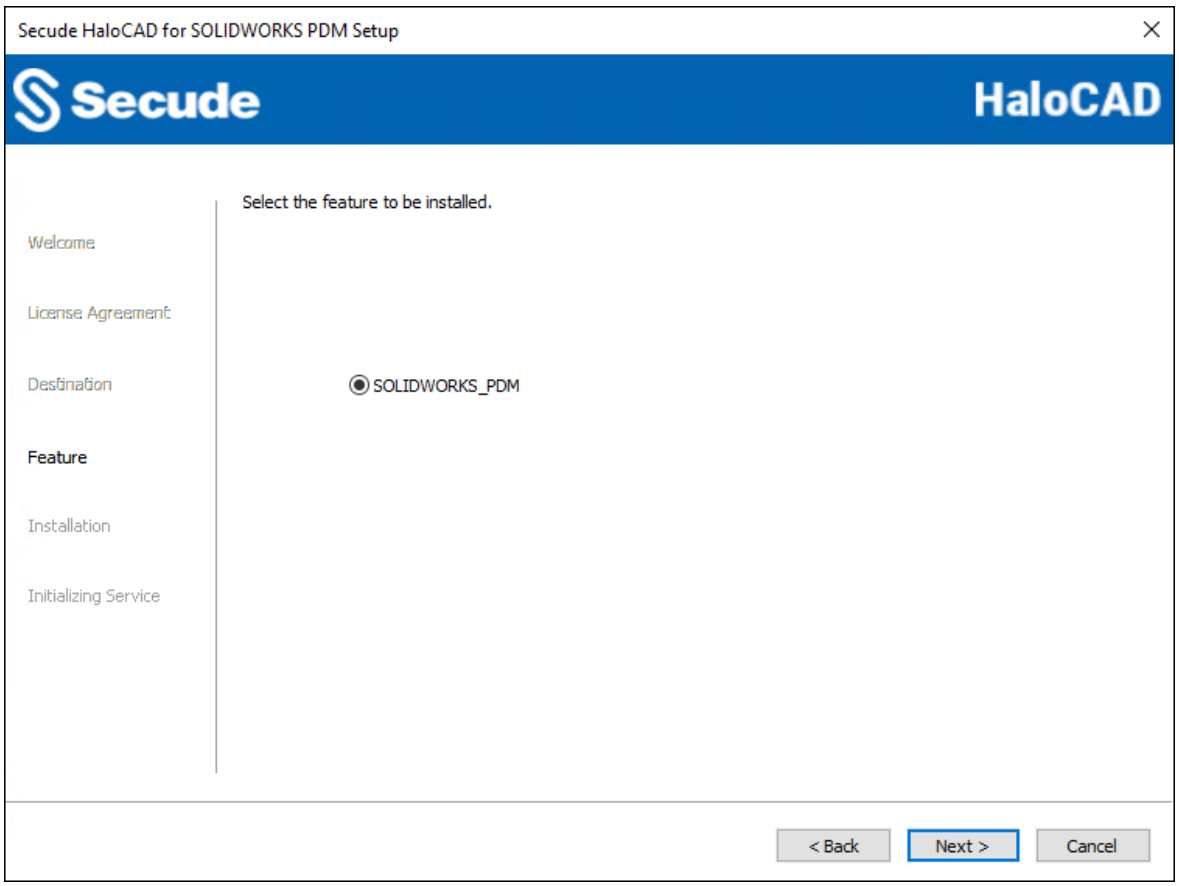
End-User License Agreement dialog

7. Read the **End-User License Agreement**. If you agree to the terms, select **I accept the terms in the License Agreement**, and then click **Next**.
8. The **Destination** dialog appears.



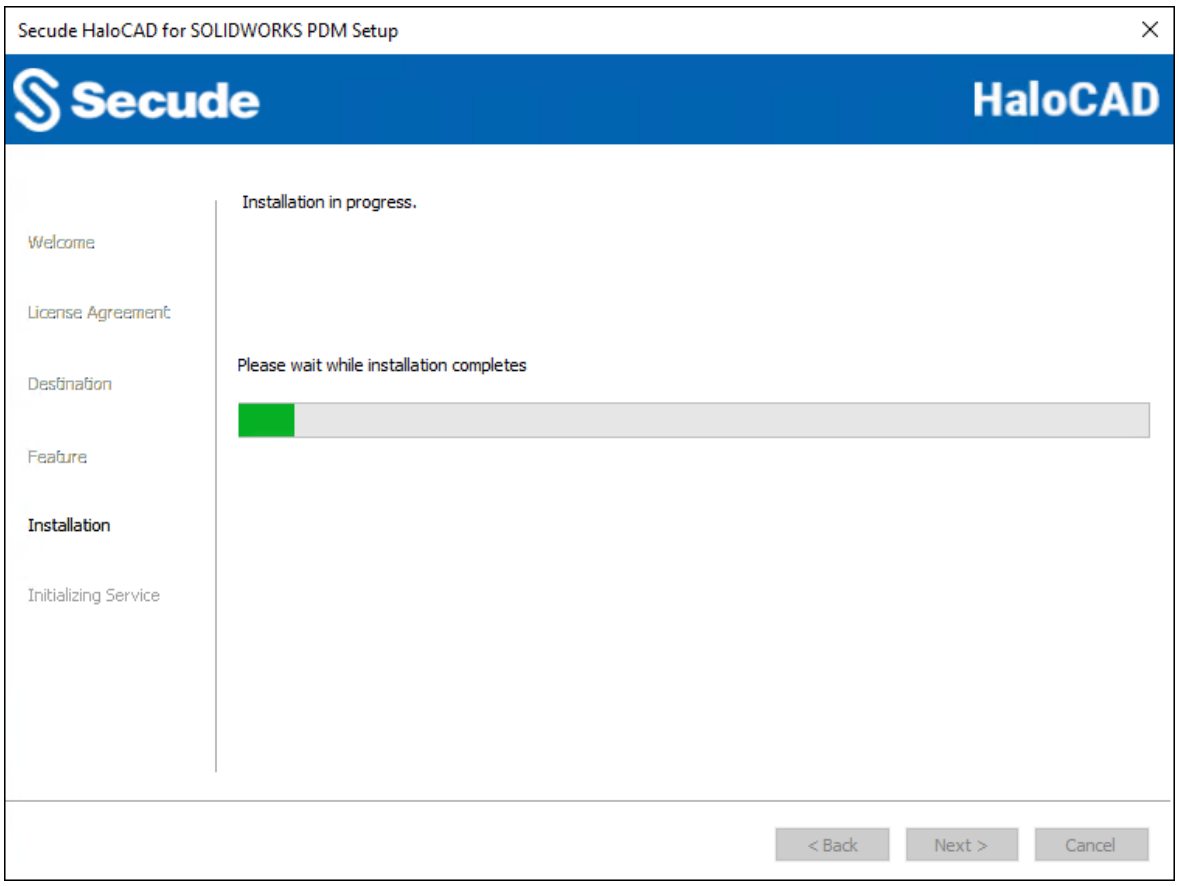
Destination folder selection dialog

9. By default, the application files are installed in the following directory: `C:\Program Files\Secude\`. To install HaloCAD for SOLIDWORKS PDM in a different location, click **Browse** and select the required directory. To return to a previous step in the installation, click **Back** (optional).
10. Click **Next**.
11. The **Feature** dialog appears.



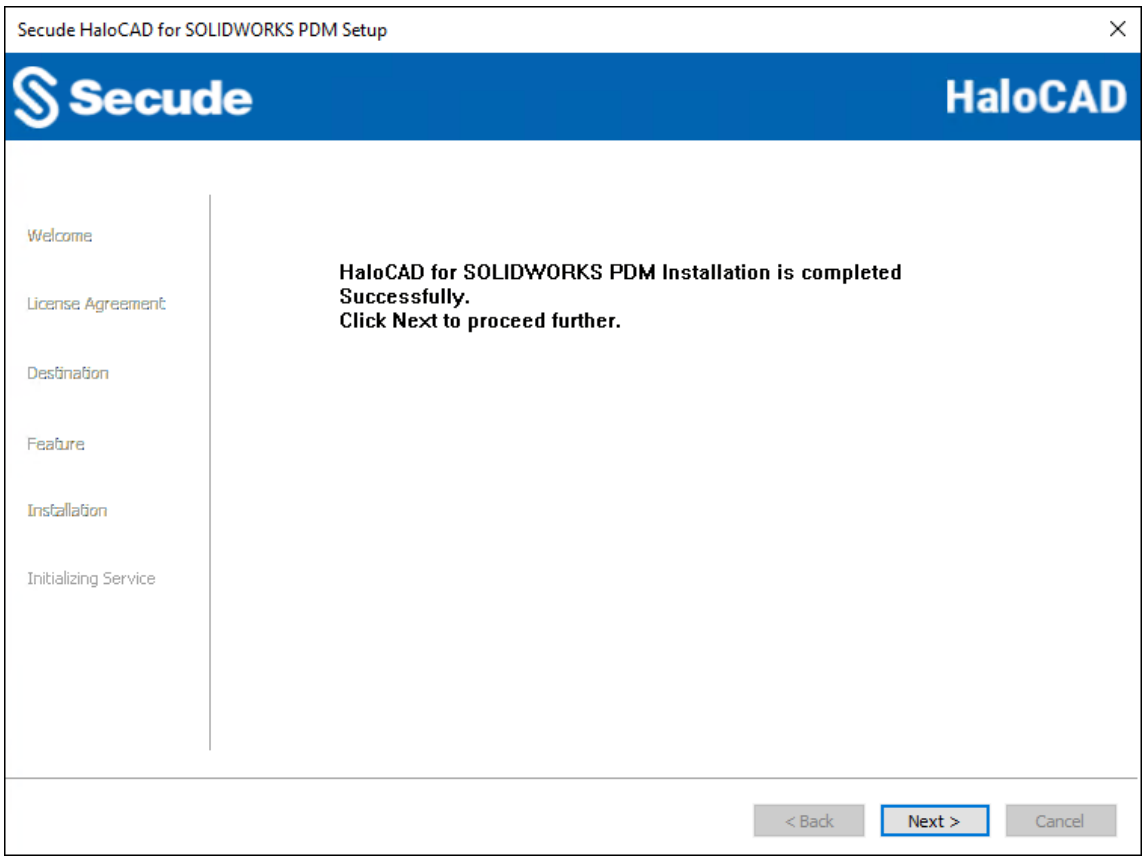
Feature selection dialog

12. By default, the **SOLIDWORKS_PDM** option is selected. To return to a previous step in the installation, click **Back** (optional).
13. Click **Next**.
14. The installation begins, and the progress is displayed in the **Installation** dialog.



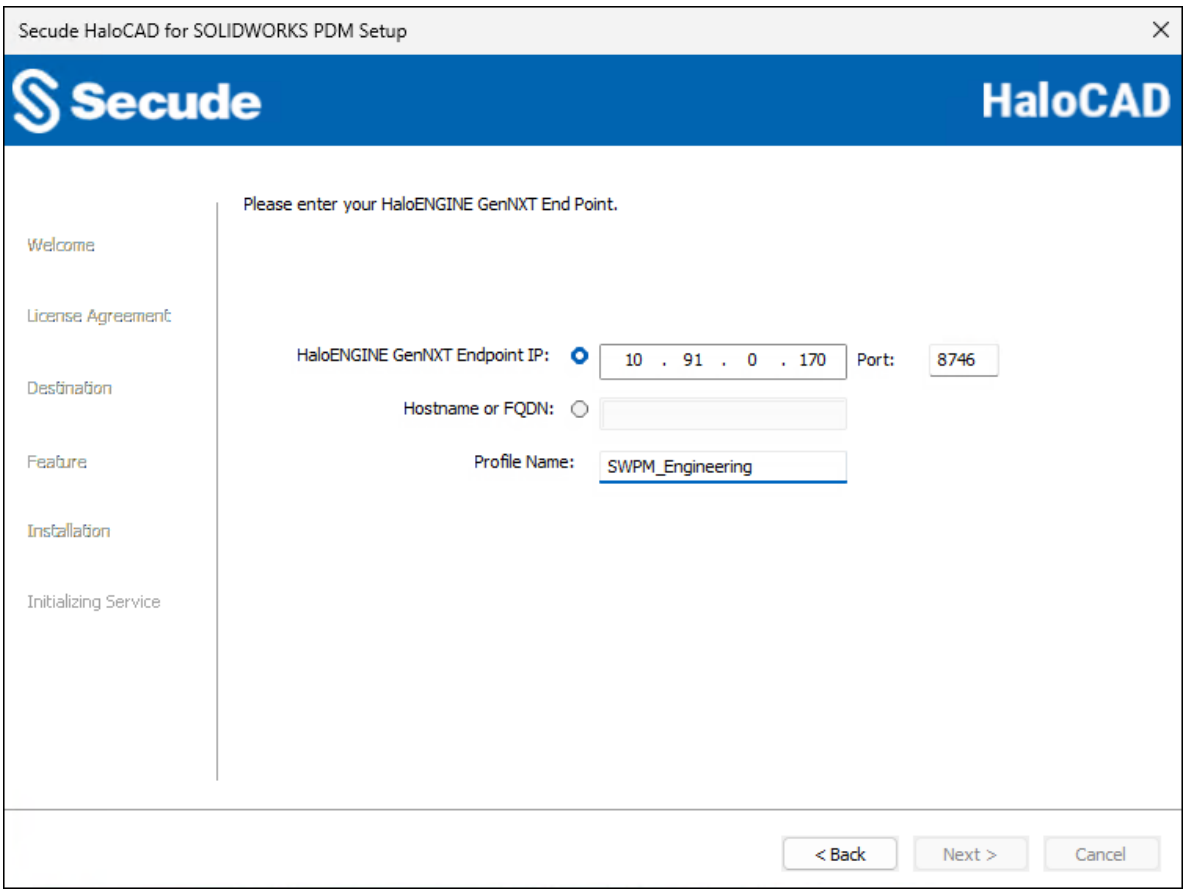
Installation dialog

15. When the installation is complete, a confirmation message appears indicating that the HaloCAD for SOLIDWORKS PDM component has been successfully installed.



Installation completed dialog

16. Click **Next.**
17. The **Initializing Service** dialog appears.



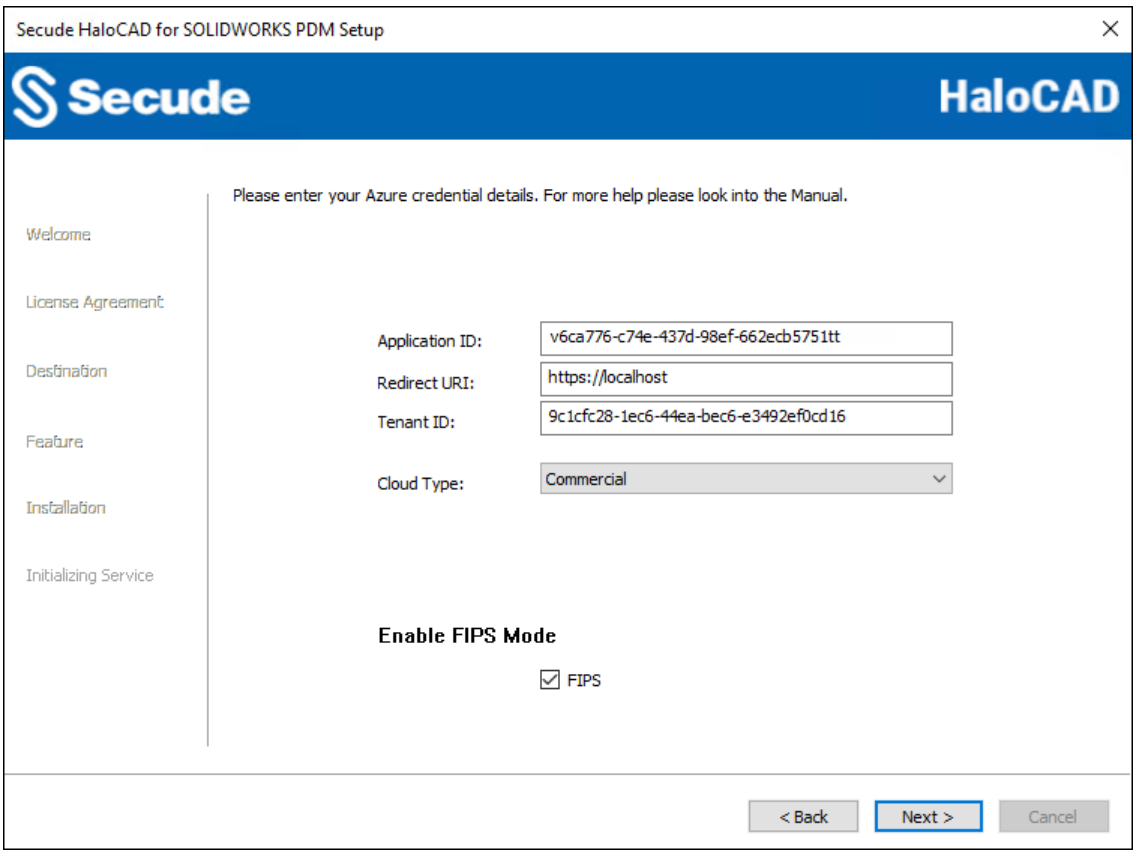
Endpoint dialog

a. Choose either the IP address or the hostname and provide the relevant information. In **HaloENGINE GenNXT Endpoint IP**, type the HaloENGINE GenNXT's IP address. For example, 10.91.0.170. Alternatively, type the fully qualified domain name (FQDN) or hostname into the **Hostname** or **FQDN** fields. For example, `SOLIDWORKSServer01.secude.com`. The default port number **8746** is displayed; however, you can enter your HaloENGINE GenNXT port number instead.

b. Enter the **Profile Name** that is assigned in the Admin Portal. For example, `SWPDM_Engineering`.

c. At this stage, HaloCAD attempts to connect to the HaloENGINE GenNXT. If an invalid endpoint is entered or the HaloENGINE GenNXT server cannot be reached, the installation is terminated with the error message "*HaloENGINE GenNXT API endpoint is invalid or not reachable*." In this case, go back to the previous screen, provide a valid endpoint, confirm that the HaloENGINE GenNXT is reachable, and then select **Next**.

18. The **MPIP** information dialog appears. To avoid errors, ensure that you enter the correct Microsoft Entra ID application details in the installation wizard. Note**:** If the `hc.conf.enc` file is included with the installer, this initialization screen is skipped, and only the completion dialog is shown. The initialization screen appears only when the `hc.conf.enc` file is not present in the installer folder.



Initialization dialog

a. **Application ID**: Enter the Application ID of the registered application in the Microsoft Entra admin center. For example, `v6ca776-c74e-437d-98ef-662ecb5751tt`

b. **Redirect URI**: Enter the URI that was provided when registering the native application. For example, `https://localhost`.

c. **Tenant ID:** If the registered application is **Single tenant**, you need to enter the globally unique identifier of your tenant if not, you can leave it empty. For example, `9c1cfc28-1ec6-44ea-bec6-e3492ef0cd16`

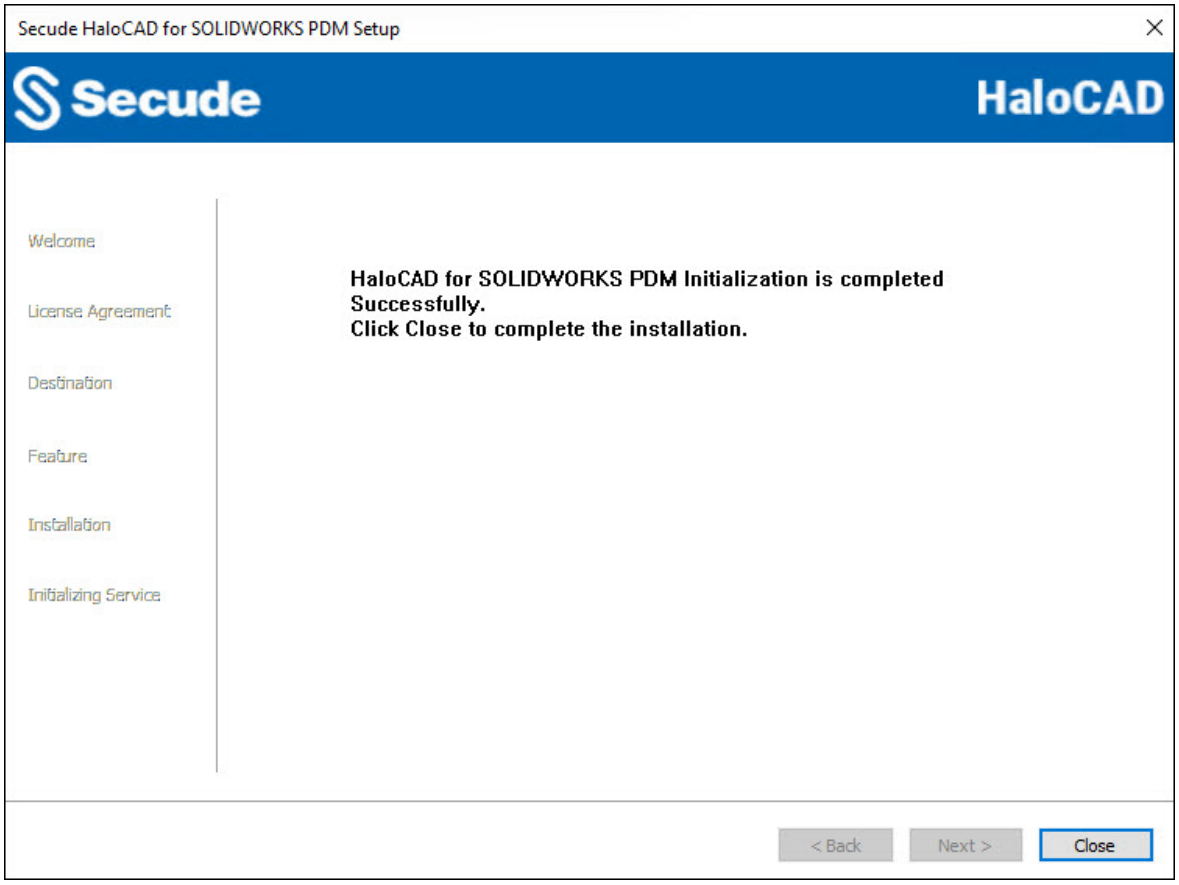
d. **Cloud Type**: **Commercial** is selected by default. Based on your Azure subscription and configuration, select the required cloud type from the list: Commercial, Custom, Germany, US_DoD, US_GCC, US_GCC_High, US_Sec, US_Nat, or China_01.

   If you select **Custom**, enter the appropriate URLs in the **Protection Cloud URL** (for example, `https://api.aadrm.com`) and **Policy Cloud URL** (for example, `https://dataservice.protection.outlook.com`) fields.

e. **Enable Federal Information Processing Standards (FIPS):** Enable this option to use encryption algorithms that comply with FIPS standards. When enabled, MPIP uses only FIPS-compliant encryption algorithms, and when disabled, it uses standard encryption algorithms. If this option was not enabled during installation, it can later be enabled through a registry entry.

f. Click **Next**.

19. Once the initialization is complete, a success message appears as shown below.



Initialization completed dialog

20. Click **Close** to exit the installation wizard.
21. Based on the selected option in the initial prompt displayed when clicking the installer:
    - If you choose **Yes**, the machine restarts automatically.
    - If you choose **No**, you must restart it manually.

Post-installation files

- View log files at: `%AppData%\Roaming\Secude\HaloCAD\SOLIDWORKS PDM\halocad.log`
- HaloCAD stores configuration settings in the Windows registry at `HKEY_LOCAL_MACHINE\SOFTWARE\Secude\HaloCAD for SOLIDWORKS PDM`; do not modify registry values unless required. Only the `enable_fips` setting may be changed (`true`: MPIP uses FIPS-compliant encryption algorithms; `false`: MPIP uses standard encryption algorithms).
- To update HaloENGINE GenNXT settings such as `profile_name`, edit: `HKEY_LOCAL_MACHINE\SOFTWARE\Secude\HaloCAD for SOLIDWORKS PDM\ep\HCADSWPDM`
- Back up the registry before modifying any entries.

4.2.2. Silent Mode

In addition to Graphical Mode, you can install the HaloCAD for SOLIDWORKS PDM component in **Silent Mode**. Silent Mode does not require user interaction or display a user interface. It enables you to install using command-line options.

1. Open the Command Prompt with elevated rights (Run as Administrator).
2. Navigate to the directory that contains the HaloCAD for SOLIDWORKS PDM installer.
3. To view the available **Silent Mode** options, run the following command:
4. **Type** `HaloCAD_SWPDM_Setup.exe -help`

   Press `Enter`

   Output

   ...

   ```
   HaloCAD_SWPDM_Setup.exe [-install [-solidworkspdmshield] [-dir
   <destination_directory>]
   [<ApplicationID> <Redirect URI> <TenantID/Name>] <haloengine_api_endpoint>
   <haloengine_api_port> <haloengine_api_ProfileName> <RestartRequired <true|false>>
   <Cloud Type
   ("Commercial"|"Custom"|"Germany"|"US_DoD"|"US_GCC"|"US_GCC_High"|"US_Sec"|"US_Nat"|"C
   hina_01"|"")> [(if Custom) <Protection Cloud Url> <Policy Cloud Url>] [enablefipsmode
   <true|false>]]
   For Silent Mode Installation if ENC file already exists in the same location
   HaloCAD_SWPDM_Setup.exe [-install [-solidworkspdmshield] [-dir
   <destination_directory>] <haloengine_api_endpoint> <haloengine_api_port>
   <RestartRequired <true|false>> <haloengine_api_ProfileName> <enablefipsmode
   <true|false>>]
   HaloCAD_SWPDM_Setup.exe [-uninstall -silent <true|false>]
   ```

   Note: By selecting `true`, the computer restarts immediately after installing the HaloCAD component. If `false` is selected, the HaloCAD component is installed, but the computer must be restarted manually later. The HaloCAD component becomes active only after a system restart.
5. The following command shows how to install and initialize HaloCAD.

   ```
   HaloCAD_SWPDM_Setup.exe -install -solidworkspdmshield -dir "C:\Program Files\Secude"
   v6ca776-c74e-437d-98ef-662ecb5751tt https://localhost 9c1cfc28-1ec6-44ea-bec6-
   e3492ef0cd16 10.91.0.170 8746 SWPDM_Engineering true Custom https://api.aadrm.com
   https://dataservice.protection.outlook.com -enablefipsmode true
   ```
6. The example below shows how to install the add-on using the `hc.conf.enc` file located in the same installation location.

```
HaloCAD_SWPDM_Setup.exe -install -solidworkspdmshield -dir "C:\Program Files\Secude"
10.91.0.170 8746 false SWPDM_Engineering -enablefipsmode true
```

7. Press `Enter`.

   Result

   The installation is complete.

Next Step

After the installation is complete, you can view the HaloCAD-protected files. Please refer to the Operations Manual for more information.

5. Appendix

This section provides supplemental information.

5.1. Third-Party Libraries

Third-party software/code is included or bundled with Secude's products according to its appropriate license. Secude conducts testing to make sure the third-party products are compatible with and perform as intended with Secude applications.

The third-party libraries and dependencies used by HaloCAD for SOLIDWORKS PDM are shown in the table below.

Library	Version	Source Code	License Link
Mhook	2.5.1	https://github.com/apriorit/mhook	https://github.com/apriorit/mhook#license
Protobuf Library	3.15.6	https://github.com/protocolbuffers/protobuf	https://github.com/protocolbuffers/protobuf/blob/master/LICENSE
JSON Parser	3.11.3	https://github.com/nlohmann/json	https://github.com/nlohmann/json/blob/develop/LICENSE.MIT
OpenSSL	3.4.5	https://github.com/openssl	https://github.com/openssl/openssl/blob/master/LICENSE.txt
tbb	2021.6.0	https://github.com/oneapi-src/oneTBB	https://github.com/dwaddington/tbb-2018/blob/tbb_2018/LICENSE
MSAL	4.72.1	https://github.com/AzureAD/microsoft-authentication-library-for-dotnet	https://github.com/AzureAD/microsoft-authentication-library-for-dotnet/blob/master/LICENSE
WTL	10.0.10320	https://www.nuget.org/packages/wtl/10.0.10320	https://opensource.org/licenses/cpl1.0.txt
MIP SDK	1.18.103	https://learn.microsoft.com/en-us/information-protection/develop/version-release-history	https://docs.microsoft.com/en-us/information-protection/develop/

Third-party libraries

5.2. SOLIDWORKS PDM Metadata Definitions

The table below lists the SOLIDWORKS PDM metadata available in the HaloENGINE GenNXT.

SOLIDWORKS PDM Metadata	Use
author_name	Derivation from the Web2 client interface Items author.
domain_name	Derivation from the network domain name associated with the current user. (For example, `SZVLU100.com`)
file_type	Derivation from file type. File types of SOLIDWORKS.
user_name	Derivation from machine logged-on user. (For example, John and Derek)
client_hostname	Derivation from the computer where SOLIDWORKS PDM is installed. (For example, `SZVLU100.com`)
current_state	Derivation from the file's status as set in SOLIDWORKS PDM. (For example, Approved and Waiting for approval)
project_name	The name of the project from which the saved file is derived. (For example, CMS Turbo Engine)
ad_group	Derivation from the domain groups. (For example, Domain Users and Superusers)
folder_path	Derivation from folder name in SOLIDWORKS PDM server. (For example, `C:/<Folder>`). Please note that files cannot be encrypted if the folder name (`folder_path`) is specified with a backslash "****", such as `C:\folder1\folder2`. Therefore, it is advised to configure with a forward slash "**/**", such as `C:/folder1/folder2`.
preexpression_custom_pre-expression	Derivation from custom pre-expression 1. Yes 2. No

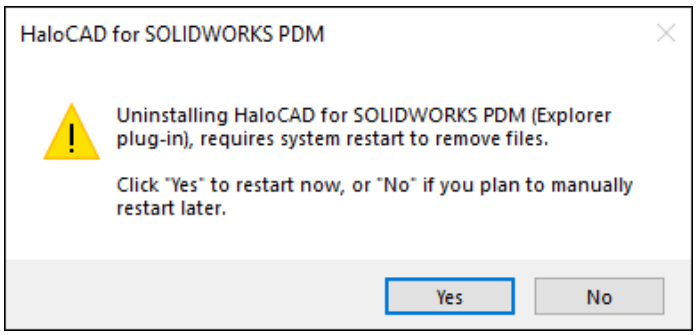
SOLIDWORKS PDM metadata

5.3. Uninstalling HaloCAD for SOLIDWORKS PDM

When you no longer use HaloCAD for SOLIDWORKS PDM, you may uninstall the application. Uninstalling removes all files and registry settings that were added to your computer during the initial installation.

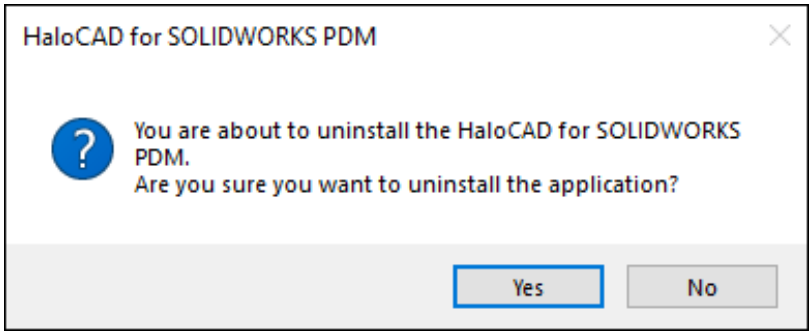
Method #1

1. Click **Start** menu > go to **Control Panel** > **Programs** > **Programs and Features** > **Uninstall a Program** > select **HaloCAD for SOLIDWORKS PDM** application from the list > right-click and select **Uninstall** option or double-click on the installer `HaloCAD_SWPDM_Setup.exe` file.
2. Depending on your Windows security settings, you may get a security warning as "*Do you want to allow the following program to make changes to this computer*?". If you get this security warning, click the **Yes** button to confirm that you want to uninstall the add-on.
3. The warning message shown below appears.



Uninstall Message #1

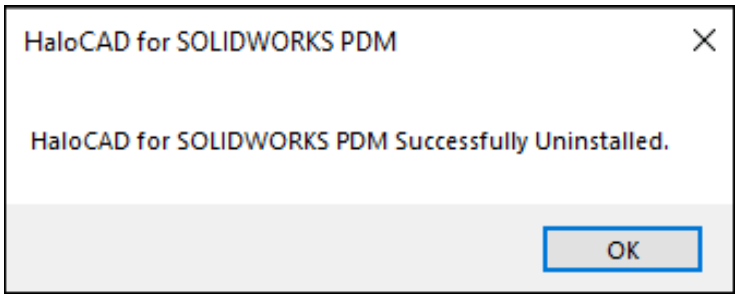
4. Uninstalling HaloCAD for SOLIDWORKS PDM (Explorer plug-in) requires your computer to restart to confirm that all files have been completely removed.
   a. **Yes** — The computer restarts immediately after removing the HaloCAD component.
   b. **No** — The HaloCAD component is uninstalled, but the computer must be restarted manually later.
5. The following notification appears asking you to confirm the uninstall, regardless of whether you selected **Yes** or **No** in the previous message.



Uninstall Message #2

6. Click **Yes** to begin the uninstallation. If you choose **No**, the uninstalling process ends.

7. The following confirmation message appears.



Uninstall Message #3

Result

a. The HaloCAD component is successfully uninstalled.

b. Click **OK** to close the dialog.

c. The uninstallation process is complete.

d. **Alternative method:** Open **Command Prompt** as an administrator, run `HaloCAD_SWPDM_Setup.exe -uninstall -silent true`, and select **Yes** to restart the computer immediately after uninstalling the HaloCAD component, or **No** to complete the uninstallation and restart the computer manually later.

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