

**FOCUS
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**CUSTOMTOOLS
installation guide**

François Simon - 15.02.2016

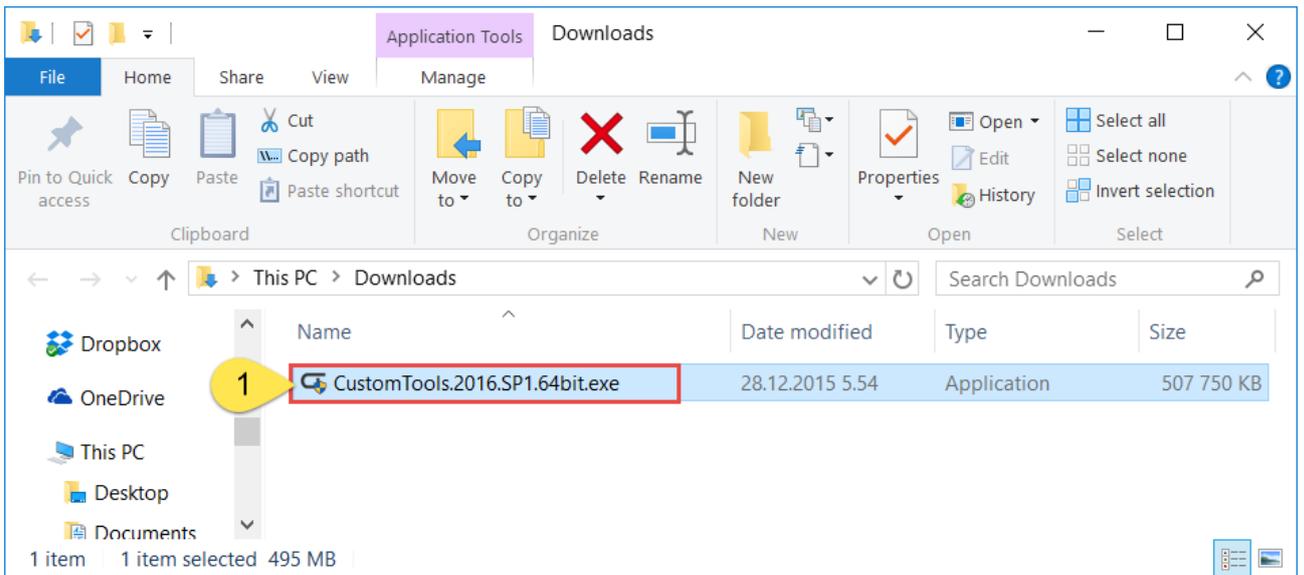


CUSTOMTOOLS

The purpose of that guide is to assist you during the different stages of the installation of CUSTOMTOOLS.

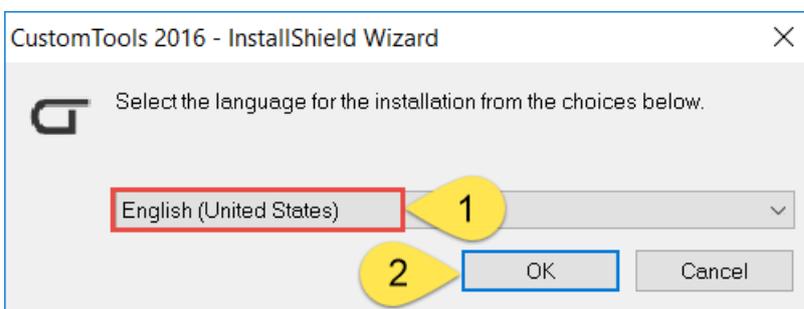
Select CUSTOMTOOLS installation package

The CUSTOMTOOLS installation package can be downloaded from the [CUSTOMTOOLS Customer portal](#) if you already have a CUSTOMTOOLS serial number or from the [CUSTOMTOOLS demo area](#).



1. After downloading the CUSTOMTOOLS installation package, double click on the CUSTOMTOOLS installation package to start the CUSTOMTOOLS installation wizard.

Select the language of installation

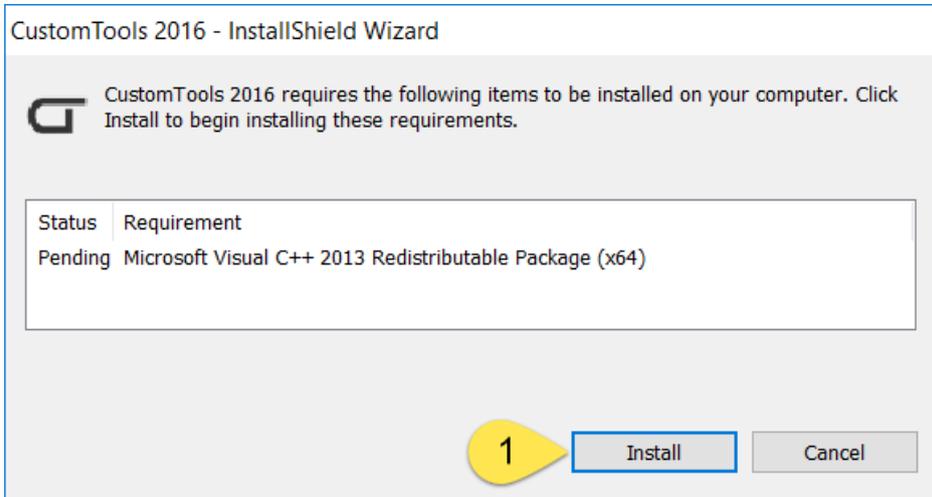


1. Select the language used to install CUSTOMTOOLS. CUSTOMTOOLS is available in seven different languages,
2. Click **OK**



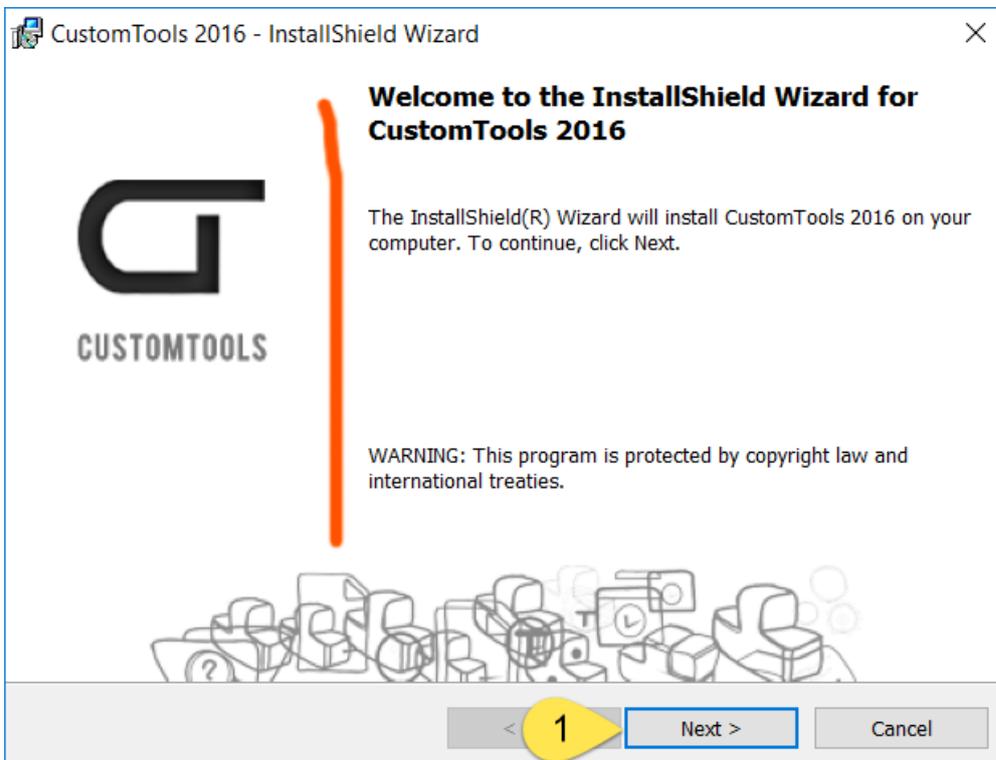
CUSTOMTOOLS

Installing Microsoft Visual C++2013



1. Click **Install** to install the InstallShield. The InstallShield is used as the installer of CUSTOMTOOLS.

Starting the InstallShield Wizard



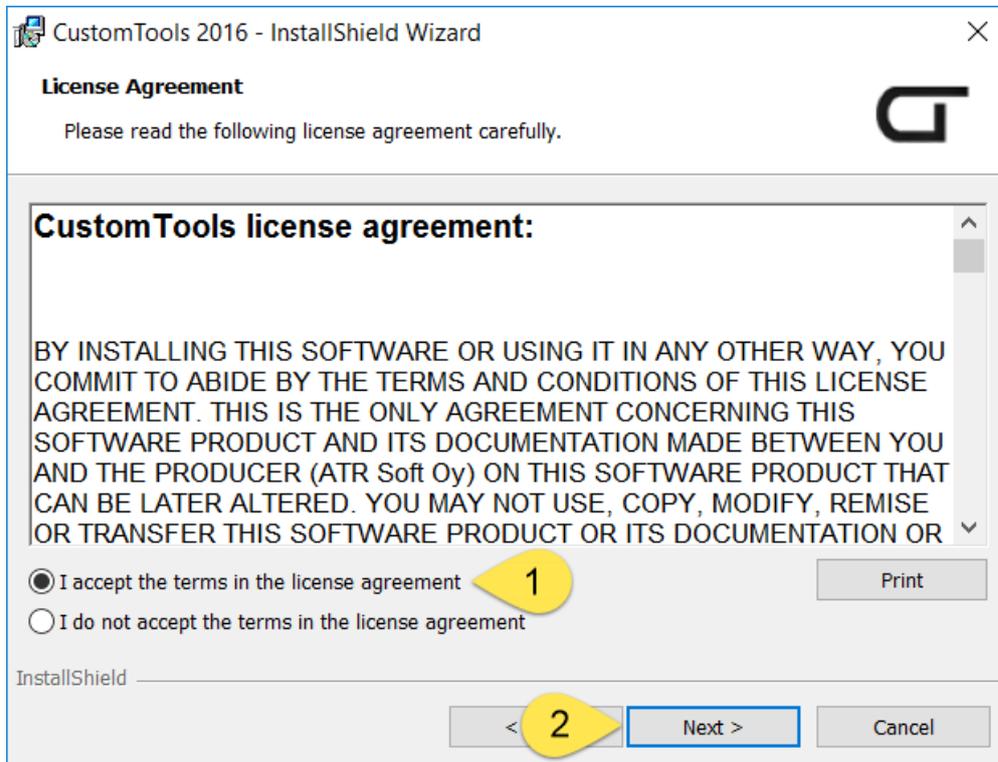
The CUSTOMTOOLS InstallShield Wizard opens



CUSTOMTOOLS

1. Click **Next >** to start the CUSTOMTOOLS Installation Wizard and open the CUSTOMTOOLS license agreement.

License agreement



In order to proceed with the installation, you must accept the terms of the CUSTOMTOOLS license agreement.

1. Select the **I accept the terms in the license agreement** button
2. Then click **Next** to continue with the installation, and define the customer information



CUSTOMTOOLS

Customer information

CustomTools 2016 - InstallShield Wizard

Customer Information

Please enter your information.

User Name: 1

Organization: 2

Serial Number: 3 4

InstallShield

1. **User name:** Enter your user name
2. **Organization:** Enter the name of your company
3. **Serial number:** Enter your CUSTOMTOOLS serial number that was given to you by your CUSTOMTOOLS reseller or by ATR Soft.
4. **Get Demo Serial...** If you do not have a serial number, please contact your local CUSTOMTOOLS reseller or click on **Get Demo Serial....** This will open your web browser and offer you to download the CUSTOMTOOLS demo. Once you have completed the form, the serial number will be sent shortly to you via email and will be valid for one month once it has been activated.
5. Click **Next** to continue with the installation and select the type of installation.

Note: You can log in into the [CUSTOMTOOLS Customer Portal](#) with your **Organization** and **Serial number**



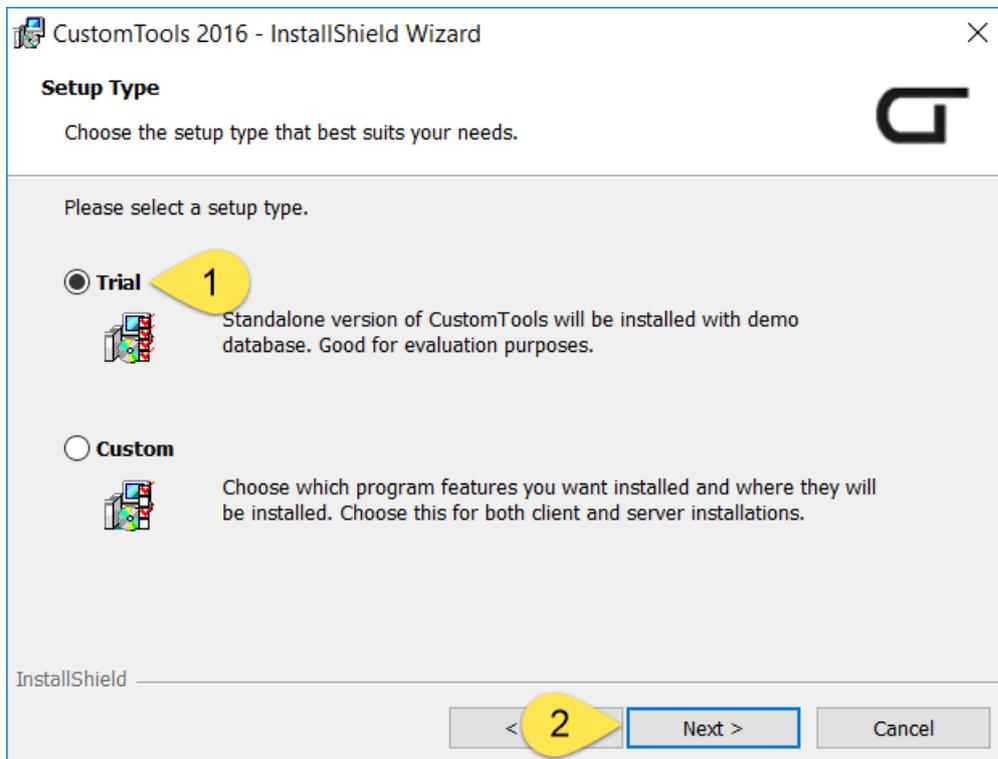
CUSTOMTOOLS

Setup Type:

CUSTOMTOOLS offers two type of installations:

- The **Trial installation** is recommended if you are planning to evaluate CUSTOMTOOLS or if you are a new CUSTOMTOOLS user. The main components will be installed during the Trial installation.
- The **Custom installation** is recommended for advanced user and allows you to select which components will be installed during the installation

Trial installation

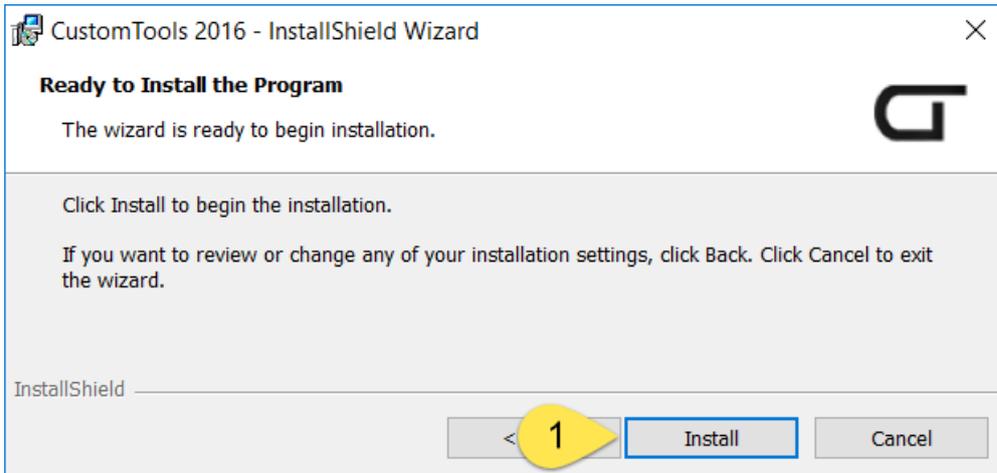


1. If **Trial** is selected from the type of installation, then the main components of CUSTOMTOOLS will be installed on your machine. The CUSTOMTOOLS database and default profile will also be created during the installation.
2. Click **Next** to continue with the installation

Start the CUSTOMTOOLS trial installation

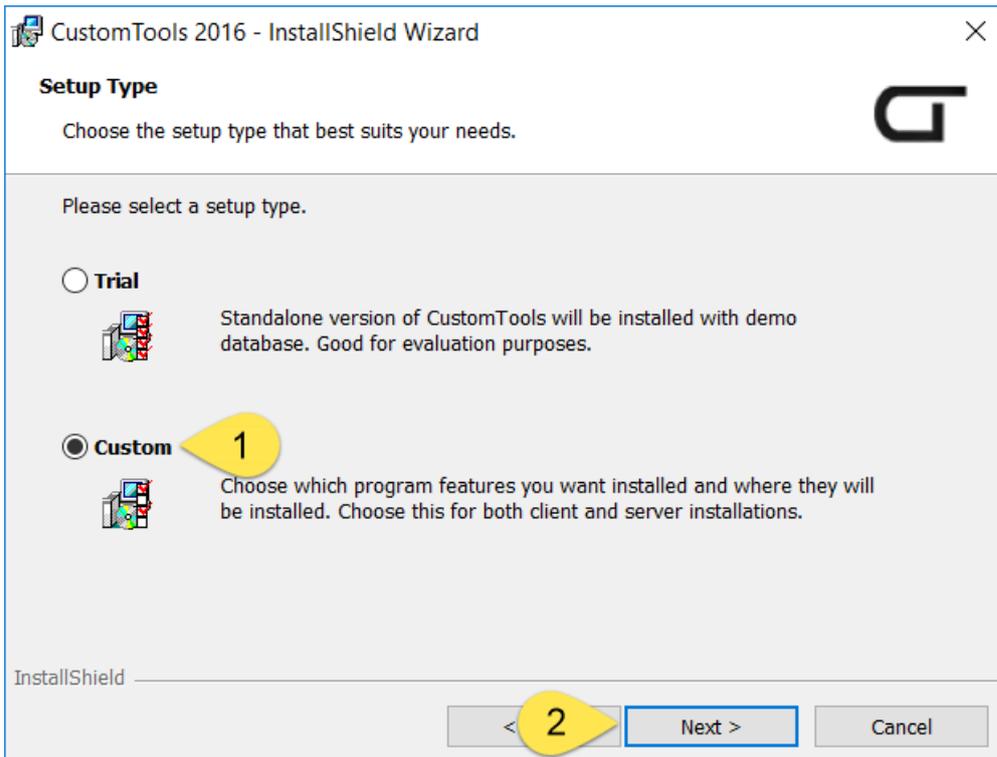


CUSTOMTOOLS



1. Click **Install** to start the installation process

Custom installation

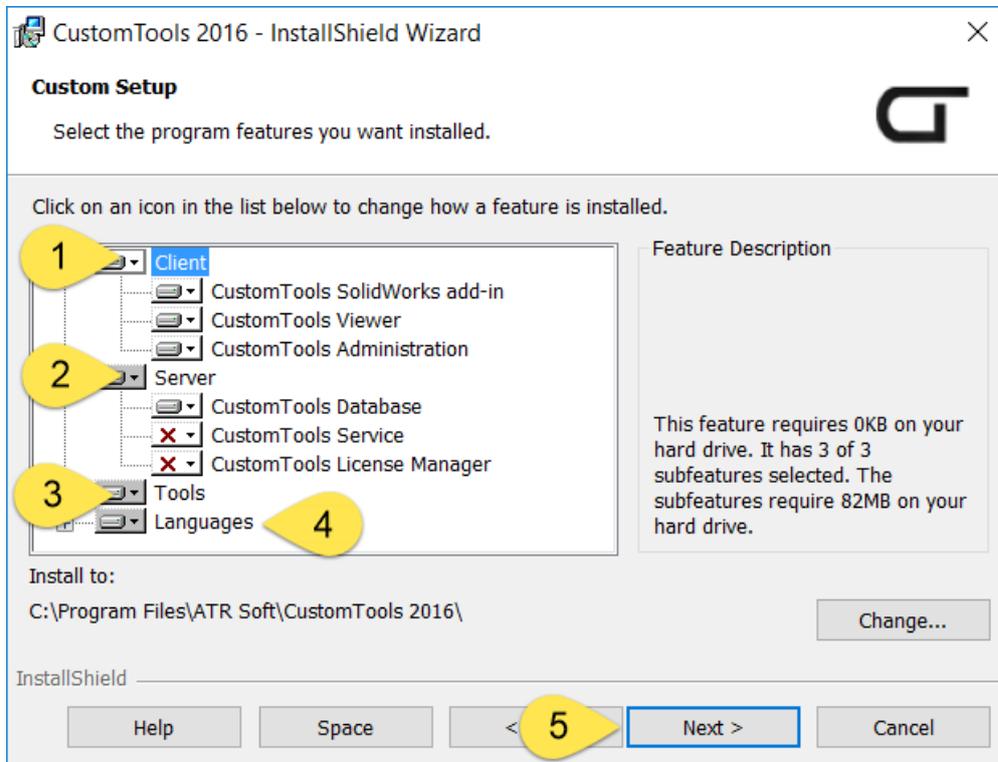


1. If **Custom** is selected from the type of installation, then you will be able to select which components of CUSTOMTOOLS will be installed on your machine.
2. Click **Next** to select which components are to be installed



CUSTOMTOOLS

Selecting the CUSTOMTOOLS components to be installed



1. Client:

- CUSTOMTOOLS SOLIDWORKS Add in:** This component should be installed on every machine where you are planning to use CUSTOMTOOLS. In order to run the **CUSTOMTOOLS SOLIDWORKS Add in** SOLIDWORKS must be installed on the machine.
- CUSTOMTOOLS Viewer:** The **CUSTOMTOOLS Viewer** does not require any installation of **SOLIDWORKS**. eDrawings is used as viewing technologies and
- CUSTOMTOOLS Administration:** This component is used to administrate the CUSTOMTOOLS database, profile, users, permissions and link to external database. The **CUSTOMTOOLS Administration** does not require an installation of **SOLIDWORKS**. In order to use CUSTOMTOOLS, the **CUSTOMTOOLS Administration** must be installed on one machine

2. Server

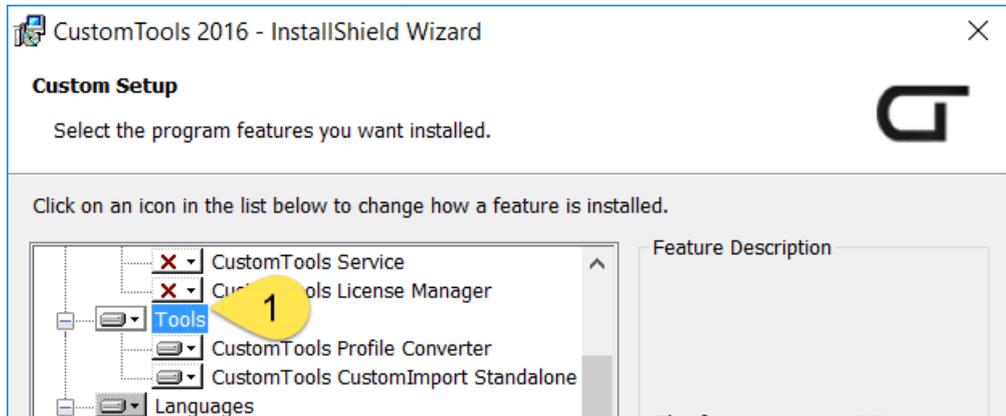
- CUSTOMTOOLS database:** Install the **Microsoft SQL Server 2014 Express Edition**, if no SQL servers have previously been installed. The SQL Server is used to host the CUSTOMTOOLS database.
- CUSTOMTOOLS Service:** If you connect **SOLIDWORKS** to an external data source with CUSTOMTOOLS, then the Service is used to synchronize linked data from the external data source to your **SOLIDWORKS** custom properties.
- CUSTOMTOOLS license manager:** If you are using floating/network licenses of CUSTOMTOOLS, the license manager must be installed in order to manage and monitor the use of the CUSTOMTOOLS licenses.



CUSTOMTOOLS

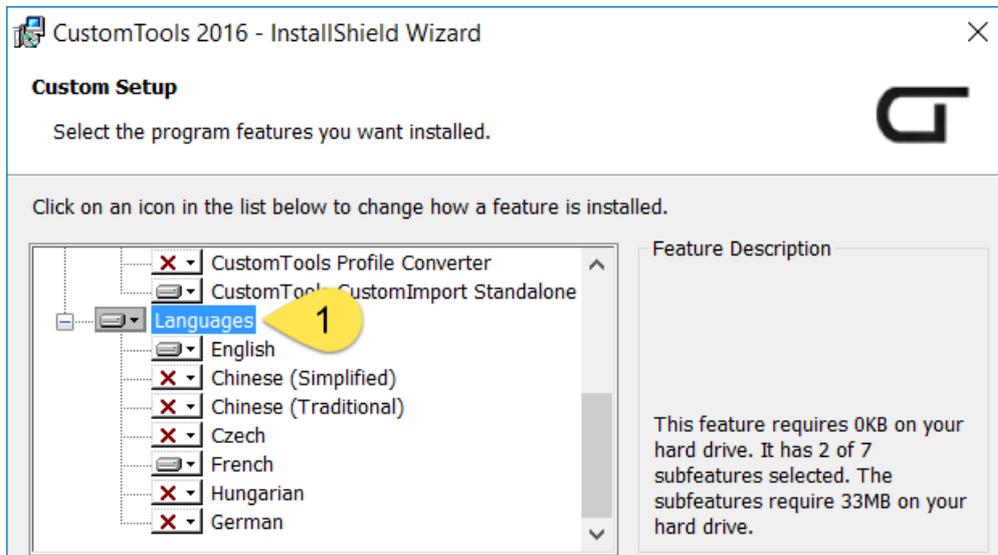
3. Tools

- a. CUSTOMTOOLS Profile Converter:
- b. CUSTOMTOOLS CustomImport Standalone: The



4. Languages

The CUSTOMTOOLS user interface is currently translated in 7 different languages, you can select which language should be install on the machine.





CUSTOMTOOLS

SQL Server System Admin Password

CustomTools 2016 - InstallShield Wizard

System Admin Password

Specify System Admin Password for SQL Server

Specify strong password for SQL Server system admin (sa) user. Keep this password in your records since you will need it when connecting to SQL Server for instance when creating or upgrading CustomTools database.

Password:

Re-type password:

InstallShield

< **3** Next > Cancel

The SA user corresponds to the System Admin user of the SQL Server. During installation, CUSTOMTOOLS prompts you to set an **sa** login password

1. Specify the System Admin (SA) password for SQL Server. The password must be strong and follow the following [security rules](#) (e.g. *AdministratOr!*)
2. The password defined must be re-entered

Note: The SA credential will be needed when upgrading the CUSTOMTOOLS database (e.g. From Service packs to Service Packs or from upgrade to major CUSTOMTOOLS release).

3. Click **Next** to continue with the installation



CUSTOMTOOLS

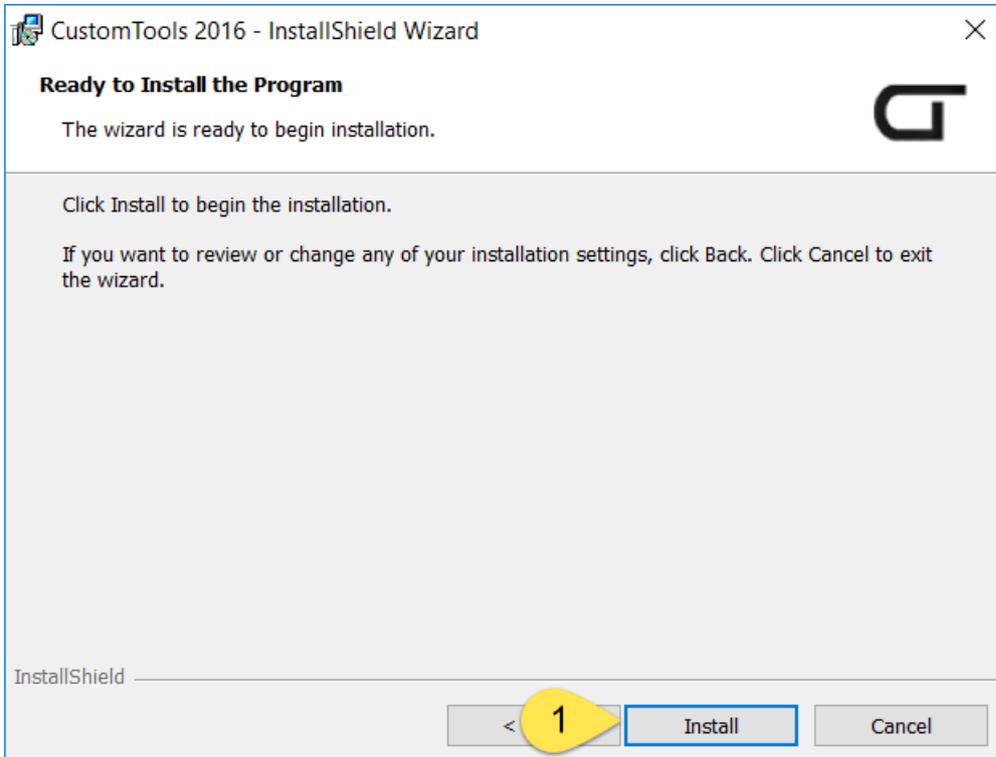
Database Server

1. Select the SQL server that will be used by CUSTOMTOOLS. Please note that the server must be accessible to all the users who are going to use CUSTOMTOOLS.
2. Select which authentication is used to connect to the SQL Server:
3. Windows authentication credentials of current user:
4. Server authentication using the Login ID and password below
5. If Server authentication using the Login ID and password below has been selected, then define the credential for the SA users (Login ID and Password)



CUSTOMTOOLS

Start the installation

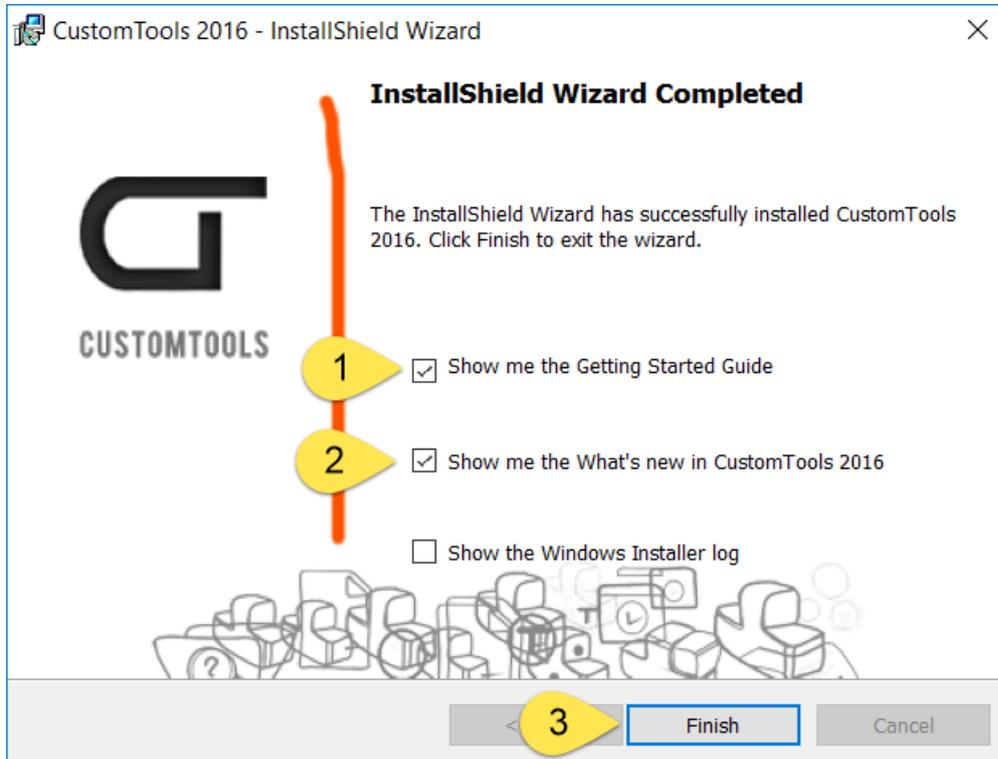


6. Click Install to start the CUSTOMTOOLS installation process. Please note that if you are installing the SQL Server 2014 Express Edition, it may take several minutes.



CUSTOMTOOLS

InstallShield Wizard Completed



1. The Getting Started Guide is a manual that will help you to configure CUSTOMTOOLS
2. The What's new in CUSTOMTOOLS highlight and introduce the new features or features improvements introduced in the latest package of CUSTOMTOOLS.
3. Click Finish to close the CUSTOMTOOLS installation wizard

Activating your CUSTOMTOOLS License

When starting SOLIDWORKS for the first time after completing the CUSTOMTOOLS installation, you will be asked to activate your CUSTOMTOOLS license.



CUSTOMTOOLS

Defining license information

Manage CustomTools Licenses

? X

Manage CustomTools Licenses



1

Serial number:

Email:

First name:

Last name:

Phone:

Please choose the action to perform:

Activate license 2

Transfer license

View currently activated licenses

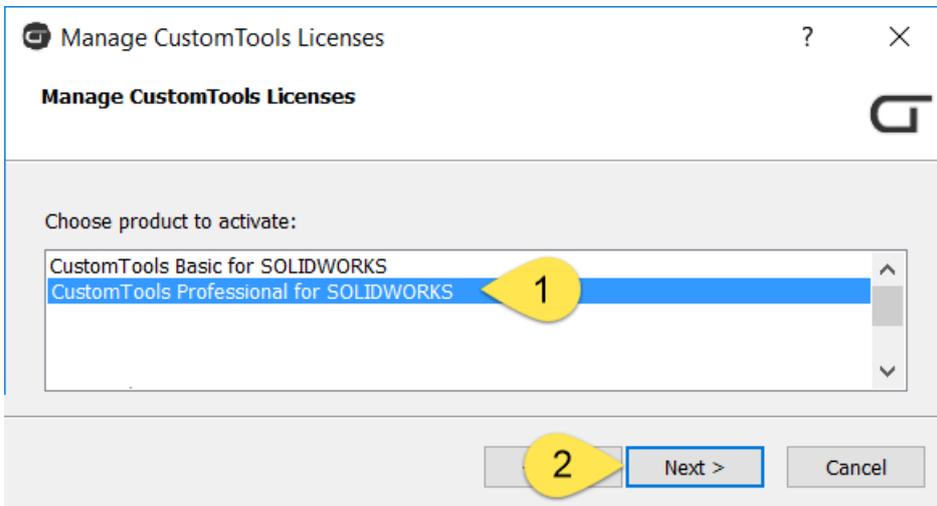
3

1. Define your email, first and last name, as well as your email and phone number.
2. Select the Activate license to activate your CUSTOMTOOLS license
3. Click Next to select which package of CUSTOMTOOLS you want to activate.



CUSTOMTOOLS

Select the CUSTOMTOOLS package to be activated

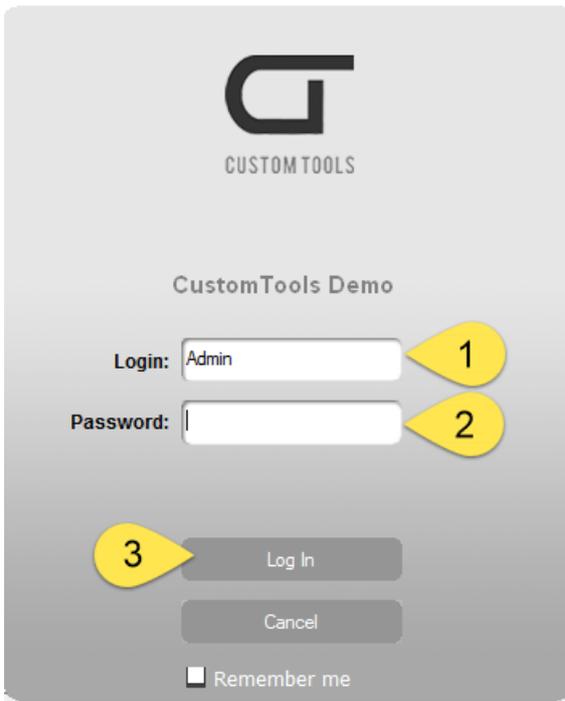


Select the package of CUSTOMTOOLS that you want to activate on the machine (e.g. CUSTOMTOOLS Basic or CUSTOMTOOLS Professional).

Click Next to activate your CUSTOMTOOLS license.

CUSTOMTOOLS database log in

Once the activation is completed the CUSTOMTOOLS Database log in appears and ask you to connect to the CUSTOMTOOLS database





CUSTOMTOOLS

1. **Login:** Enter your CUSTOMTOOLS user name, by default CUSTOMTOOLS offers the Admin
2. **Password:** Enter your CUSTOMTOOLS user name password. By default the CUSTOMTOOLS Admin users does not have a password.
3. Click **Log in** to connect to the CUSTOMTOOLS database