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CUSTOMTOOLS installation guide

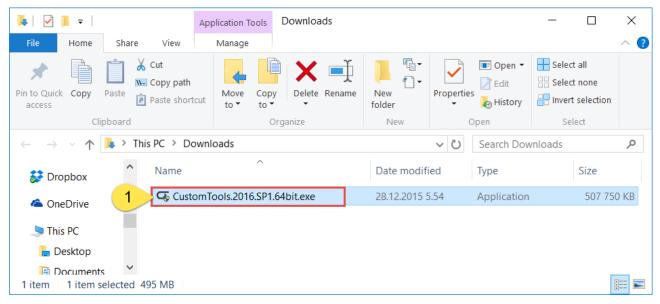
Francois Simon - 15.02.2016



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 <u>CUSTOMTOOLS Customer</u> <u>portal</u> if you already have a CUSTOMTOOLS serial number or from the <u>CUSTOMTOOLS demo area</u>.



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

CustomT	ools 2016 - InstallShield Wizard	×
G	Select the language for the installation from the choices below.	
	English (United States)	~

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

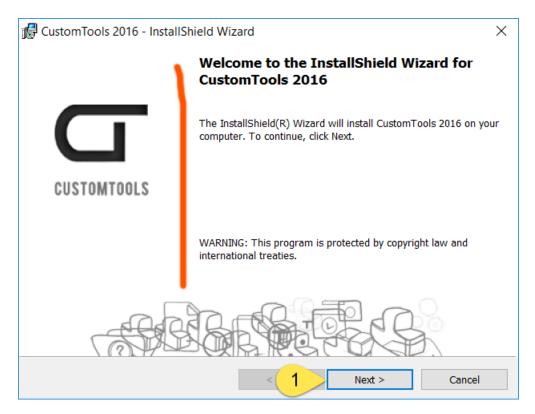
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CustomTools 2016 - InstallShield Wizard	
CustomTools 2016 requires the following items to be installed on your computer. Click Install to begin installing these requirements.	
Status Requirement Pending Microsoft Visual C++ 2013 Redistributable Package (x64)	
1 Install Cancel	

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

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CUSTOMTOOLS

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

License agreement

🕼 CustomTools 2016 - InstallShield Wizard	Х
License Agreement	-
Please read the following license agreement carefully.	
CustomTools license agreement:	~
Custom roois license agreement.	
BY INSTALLING THIS SOFTWARE OR USING IT IN ANY OTHER WAY, YOU COMMIT TO ABIDE BY THE TERMS AND CONDITIONS OF THIS LICENSE	
AGREEMENT. THIS IS THE ONLY AGREEMENT CONCERNING THIS SOFTWARE PRODUCT AND ITS DOCUMENTATION MADE BETWEEN YOU	
AND THE PRODUCER (ATR Soft Oy) ON THIS SOFTWARE PRODUCT THAT	
CAN BE LATER ALTERED. YOU MAY NOT USE, COPY, MODIFY, REMISE OR TRANSFER THIS SOFTWARE PRODUCT OR ITS DOCUMENTATION OR	~
I accept the terms in the license agreement Print	
○ I do not accept the terms in the license agreement	
InstallShield	
< 2 Next > Cancel	

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 2016 - InstallShield Wizard	×
Customer Information Please enter your information.	G
<u>U</u> ser Name:	
frasimon 1	
Organization:	
Serial Number:	Get Demo Serial
InstallShield	
< 5	Next > Cancel

- 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 <u>CUSTOMTOOLS Customer Portal</u> with your **Organization** and **Serial number**



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

🕼 CustomTools 2016 - InstallShield Wizard	\times
Setup Type	•
Choose the setup type that best suits your needs.	
Please select a setup type.	
Irial 1	
Standalone version of CustomTools will be installed with demo database. Good for evaluation purposes.	
O Custom	
Choose which program features you want installed and where they will be installed. Choose this for both client and server installations.	
InstallShield < 2 Next > Cancel	

- 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 2016 - InstallShield Wizard Ready to Install the Program The wizard is ready to begin installation. Click Install to begin the installation. Click Install to begin the installation. If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.

1. Click Install to start the installation process

Custom installation

🕼 CustomTools 2016 - InstallShield Wizard	\times
Setup Type	-
Choose the setup type that best suits your needs.	
Please select a setup type.	
🔿 Trial	
Standalone version of CustomTools will be installed with demo database. Good for evaluation purposes.	
Custom Custom Choose which program features you want installed and where they will be installed. Choose this for both client and server installations.	
InstallShield Ca	ancel

- 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 🕼 CustomTools 2016 - InstallShield Wizard Х Custom Setup Select the program features you want installed. Click on an icon in the list below to change how a feature is installed. Feature Description <u>a</u> -Clien CustomTools SolidWorks add-in CustomTools Viewer 2 Server CustomTools Database This feature requires OKB on your × - CustomTools Service hard drive. It has 3 of 3 subfeatures selected. The З Tools subfeatures require 82MB on your □ - Languages Δ hard drive. Install to: C:\Program Files\ATR Soft\CustomTools 2016\ Change... InstallShield Help Space 5 Next > Cancel

1. Client:

- a. **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.
- b. **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

- a. **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.
- b. **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.
- c. **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.

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3. Tools

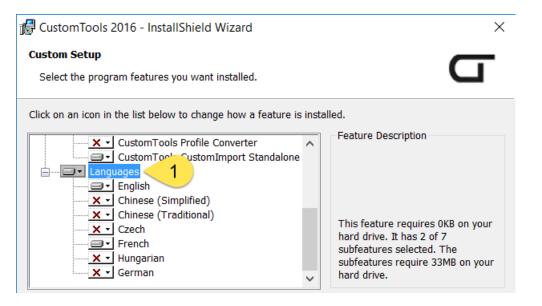
a. **CUSTOMTOOLS Profile Converter**:

b.	CUSTOMTOOLS	CustomImport	Standalone: The
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🕼 CustomTools 2016 - InstallShield Wizard			×
Custom Setup Select the program features you want installed.		(G
Click on an icon in the list below to change how a feature is CustomTools Service CustomTools License Manager CustomTools Profile Converter CustomTools CustomImport Standalone	^	talled. Feature Description	
	-	TI ()	_

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 X
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:
nstallShield Cancel
< 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 <u>security rules</u> (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 2016 - InstallShield Wizard	×
Database Server Select database server and authentication method	G
Database server that you are installing to: (local)\CUSTOMTOOLS 1 ~ Connect using: 2 Windows authenucation credentials of current user Server authentication using the Login ID and password below	Browse
3 Login ID: sa Password:]
InstallShield < Back Next >	Cancel

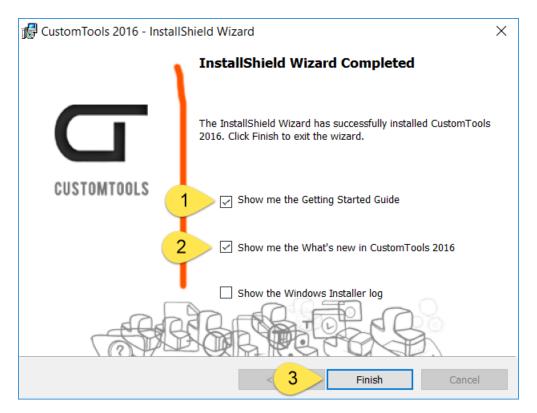
- 1. Select the SQL server that will be used by CUSTOMTOOLS. Please note that the server must accessible to all the users who are going to use CUSTOMTOOLS.
- 2. Select which authentication is used to connect to the SQL Server:
- 3. Windows authentication credentials of current user:
- 4. Server authentication 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 2016 - InstallShield Wizard	×
Ready to Install the Program	-
The wizard is ready to begin installation.	
Click Install to begin the installation.	
If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.	
InstallShield	
< 1 Install Cancel	

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	n		
G Manage CustomTools License	s	?	×
Manage CustomTools Licenses			G
Serial number:	0103		
Email:	Francois.simon@atrsoft.com		
First name:	Francois		
Last name:	Simon		
Phone:			
Please choose the action to perform	:		
Activate license			
⊖ Transfer license			
○ View currently activated lic	enses		
	3 Next >		Cancel

- 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.



Manage CustomTools Licenses	?	\times
Manage CustomTools Licenses		G
Choose product to activate:		
CustomTools Basic for SOLIDWORKS CustomTools Professional for SOLIDWORKS		^
		~
2 Next >	Ca	ancel

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

c	CUSTOM TOOLS
Login:	Admin 1
Password:	2
2	
3	Log In
	Cancel
	Remember me



- 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