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CUSTOMTOOLS

ADMINISTRATION TOOL

GETTING STARTED GUIDE

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Administration tool

Introduction

What does it do?

The **CUSTOMTOOLS Administration** tool is used to manage the CUSTOMTOOLS database, profile, users, user groups and link to external data source.

How does it work?

The **CUSTOMTOOLS Administration** tools does not require a SOLIDWORKS license. It is designed to be used by the administrator of CUSTOMTOOLS. Only one license of the **Administration tool** is needed in order to run the **SOLIDWORKS Add-in of CUSTOMTOOLS** in a single/multi user(s) environment.

How can you use it?

The **Administration Tool** can be accessed from:
- The Desktop

If the **Administration Tool** has been selected during the installation, then CUSTOMTOOLS will automatically create a Desktop icon.
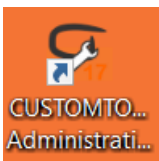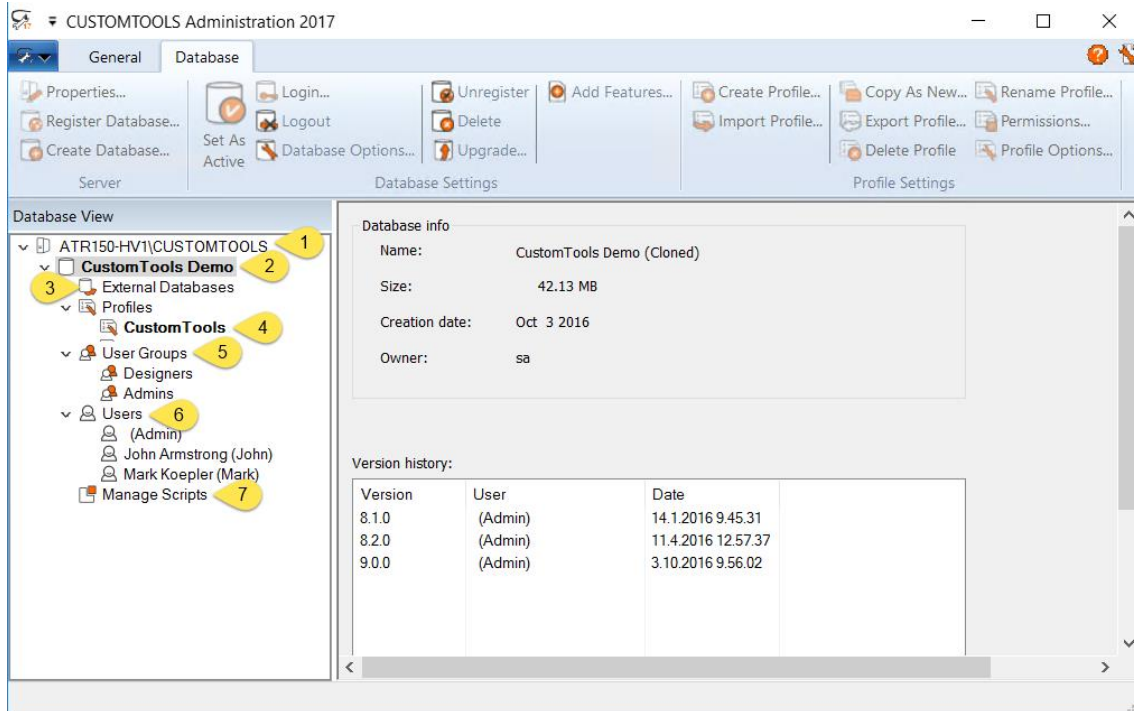

- The Program files folder

The **Administration Tool** can also be accessed from the following path:

C:\Program Files\ATR Soft\CUSTOMTOOLS 2015\CUSTOMTOOLS Administration.exe

1. Server where the CUSTOMTOOLS database is/will be installed.
2. CUSTOMTOOLS database where the files references of the SOLIDWORKS files are stored.
3. **External Databases**: Create a link to an external data source.
4. **Profiles**: Where all the settings and rules are defined and stored (*e.g. custom properties, print and conversion profiles...*).
5. **User Groups**: Group of CUSTOMTOOLS users.
6. **Users**: Individual CUSTOMTOOLS users.
7. **Manage Scripts:** Manage the CUSTOMTOOLS script *(e.g. Excel report...).*

CUSTOMTOOLS' Server

The CUSTOMTOOLS server is used to store the CUSTOMTOOLS database. CUSTOMTOOLS uses an SQL Server to store its database. The **Microsoft SQL Server Express Edition** is included in the CUSTOMTOOLS installation but CUSTOMTOOLS can also use an existing SQL Server.

The server where the CUSTOMTOOLS database will be installed should be accessible for all the different CUSTOMTOOLS' users.
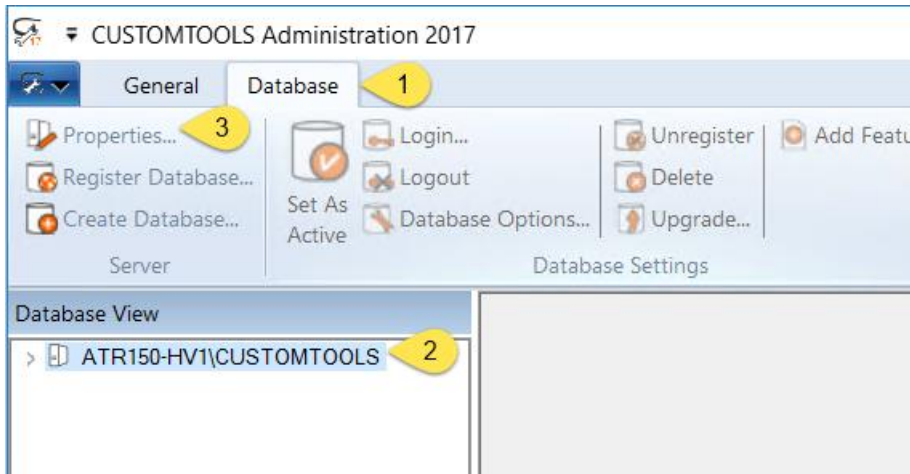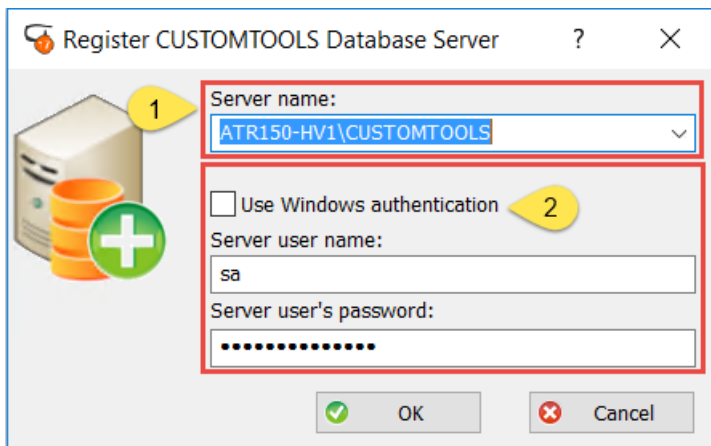
To open the **CUSTOMTOOLS Database Server** dialog where the server to install the **CUSTOMTOOLS Database** can be selected**:**

1. Activate the **Database** tab,
2. Defined **Server** where the CUSTOMTOOLS database will be installed,
3. Click on **Properties...** to select a different server.

1. From the **Server name** select the server where the CUSTOMTOOLS Database will be installed.

   By clicking on the ⌄ key then the list of available servers that can be accessed from the current machine appears.

2. To connect to the selected Server, select the **Use Windows authentication** check box or the SQL sa user credential. If the SQL Server was installed with CUSTOMTOOLS, then the credentials for the user sa were defined during the installation. If you are connected to an existing SQL Server then request the SQL sa user from your IT Admin.
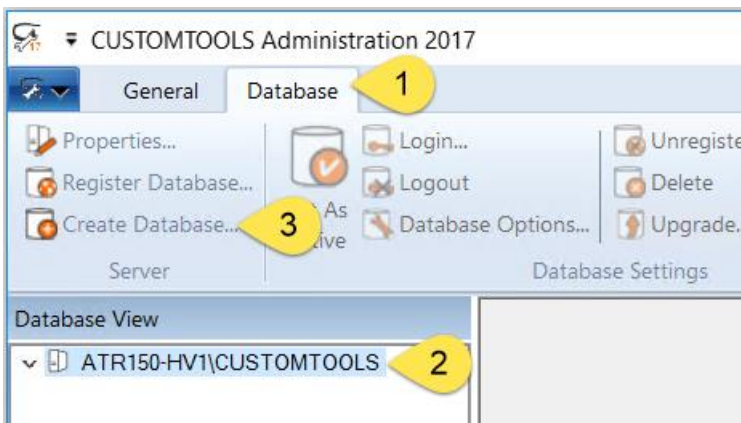
CUSTOMTOOLS Database

The CUSTOMTOOLS database is used to store the SOLIDWORKS Documents file references. The file references are automatically imported into the CUSTOMTOOLS database on save operations for documents that are created with CUSTOMTOOLS. The SOLIDWORKS Documents that were created before using CUSTOMTOOLS can be imported into the CUSTOMTOOLS database, by using the **Import** functionality of CUSTOMTOOLS.

💡 **NOTE:** Only one database is needed for a multi/single user(s) environment, as all the users are connecting to the same database.

Create a new CUSTOMTOOLS database

To create a new database,

1. Select the **Database** tab,
2. Select the **Server** where to install the CUSTOMTOOLS database,
3. Click **Create Database...** Then follow the wizard.

1. **Database name:** Define the name of the CUSTOMTOOLS database.

2. **Set the database as the active database:** The new database will be automatically selected.

3. **Create an example dictionary:** Dictionary can be used to translate custom properties during the printing and conversion operations.

4. **Create attributes:** Attributes are the link between the CUSTOMTOOLS Database and the custom properties of the SOLIDWORKS Documents.

5. **Create a Profile:** The profile is used to store the settings and configurations and is shared between the different users.

6. **Select the database language:** Select in which language the profile will be created.

1. **Profile name**: Define the name of the profile (*e.g. Company name*).
2. **Profile type**: CUSTOMTOOLS offers different possibilities to create a profile:
   a. **Empty**: The profile does not contain any settings and needs to be fully defined.
   b. **Machinery design**: Sample profile that contains pre-defined settings.
   c. **Import profile**: Import a profile from CUSTOMTOOLS (*.Ctprof*), CT3 or Property Manager.
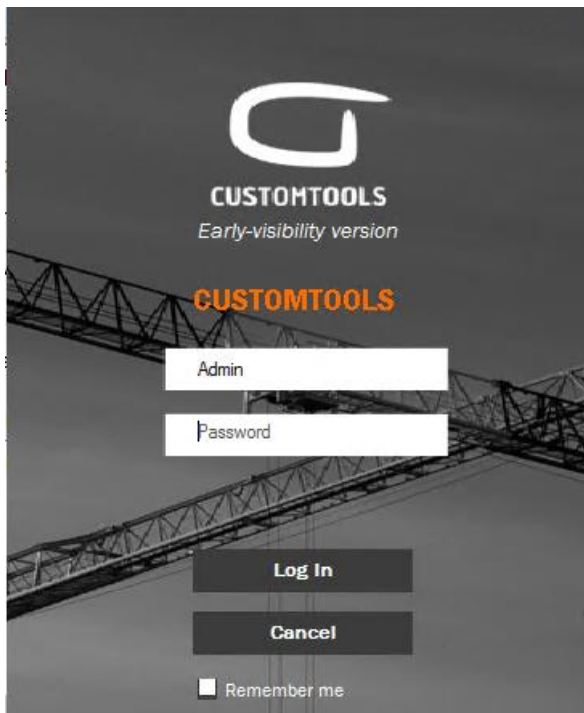
TIP: It is recommended to use the **Machinery design** profile as a base and then modify the profile based on the requirements.

![CUSTOMTOOLS logo]

Log in into the CUSTOMTOOLS database

The database **Log in** dialog will appear once the CUSTOMTOOLS database has been created. By default, CUSTOMTOOLS will offer to log in with the CUSTOMTOOLS **Admin** User. Press **Log in** without defining any value for the **Password**.
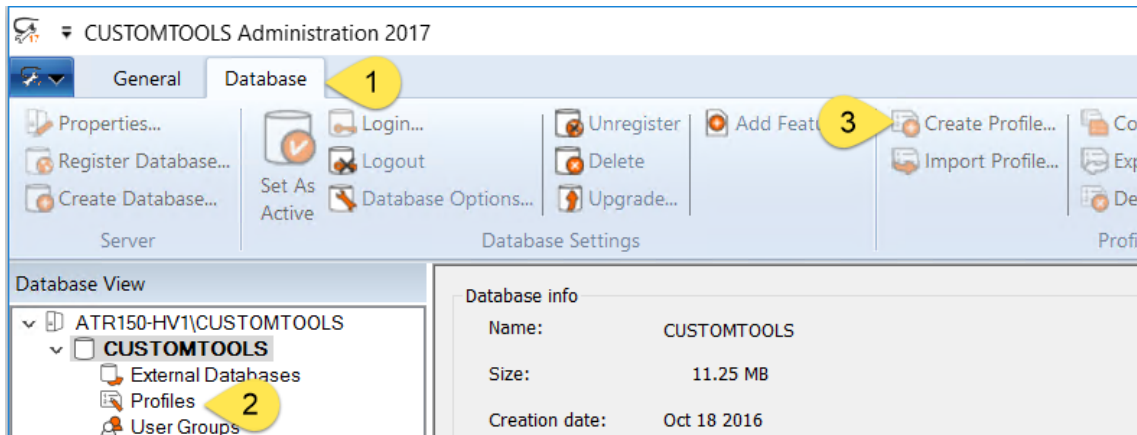
💡 **NOTE:** By default, the Admin user does not have any password. A password can be later added by editing the Admin user.
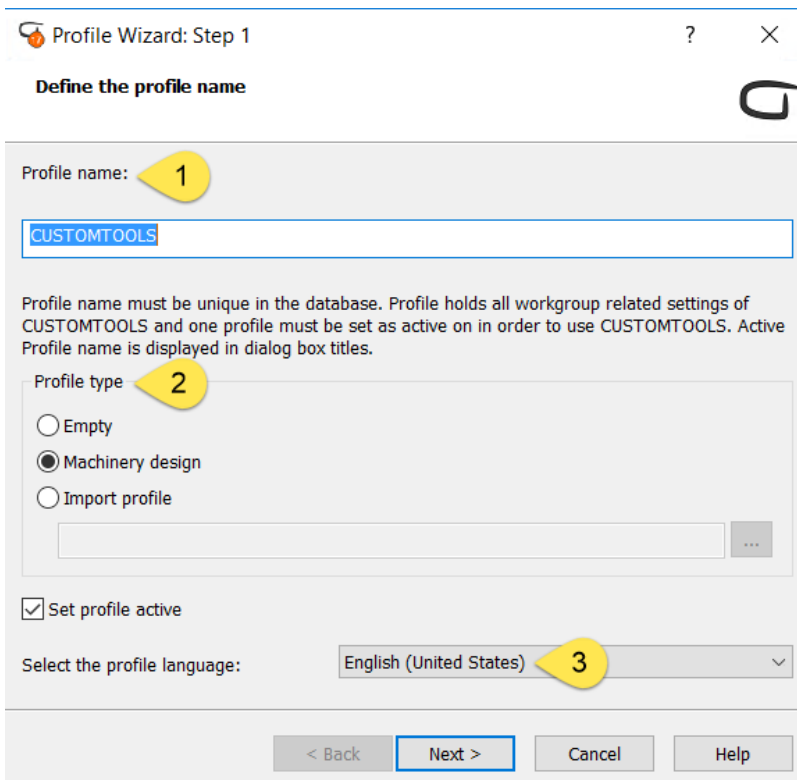
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CUSTOMTOOLS profile

The CUSTOMTOOLS profile is used to store all your settings (*e.g. Custom properties, printing and conversion profiles, file naming rules and convention…*). The same profile is shared by multiple users.

To create a new profile, log in to the **CUSTOMTOOLS database**,

1. Activate the **Database** tab,
2. Select **Profiles**,
3. Click on **Create Profiles…** then follow the wizard.

1. **Profile name:** Define the name of the profile.
2. **Profile type:** CUSTOMTOOLS offers different possibilities to create a profile:
    a. **Empty:** The profile does not contain any settings and needs to be fully defined.
    b. **Machinery design:** Sample profile that contains pre-defined settings.
    c. **Import profile:** Import a profile from CT3 or Property Manager.
3. **Select the database language:** Select in which language the profile will be created.

💡 **TIP:** It is recommended to use the **Machinery design** profile as a base then modify the profile based on the requirements.

Managing Users and User Groups

Create a new CUSTOMTOOLS user

A CUSTOMTOOLS user must be defined for every SOLIDWORKS or non-SOLIDWORKS users who are going to use CUSTOMTOOLS in order for them to access the CUSTOMTOOLS database.

To create a new user,

1. Activate the **Database** tab,
2. Right click on **User,**
3. Click **Create New...**

1. **User name:** Define the user name that will be used by the CUSTOMTOOLS user to log in into the **CUSTOMTOOLS Log in** dialog.

2.   **Password:** The password that will be used by the CUSTOMTOOLS user to log into the CUSTOMTOOLS database in the **CUSTOMTOOLS Log in.**

   Note: It is not compulsory to define a password. The **Password** and **Confirm password** fields can be left empty.

   Optional information:

3. **Active profile:** Select the CUSTOMTOOLS profile to be used by the user.

4. **First name/Last name:** Define the first and last name of the user.

5. **Initials:** The initials defined for the user can be linked to a property.

   Note: The initials can be loaded automatically when the current logged in user creates a new document in SOLIDWORKS.
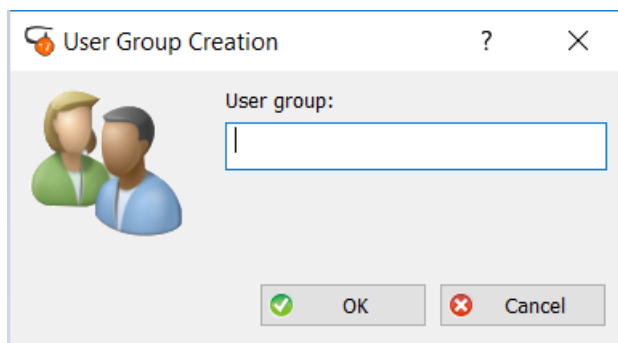
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Add a new user group

User groups are used to manage users based on groups. Different rights and permissions to use and/or modify the Profile or database settings can be assigned to different CUSTOMTOOLS **Users** belonging to the same **User Group**.
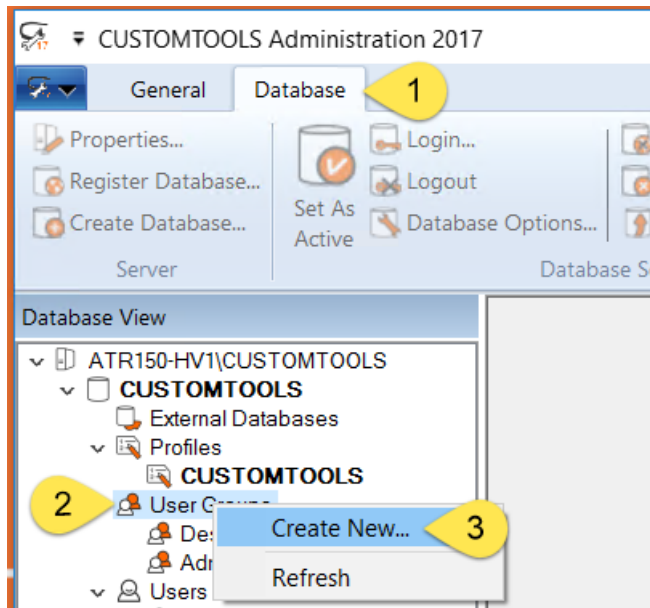
From the **Administration tool**,

1. Activate the **Database** tab,
2. Right click on the **User group**,
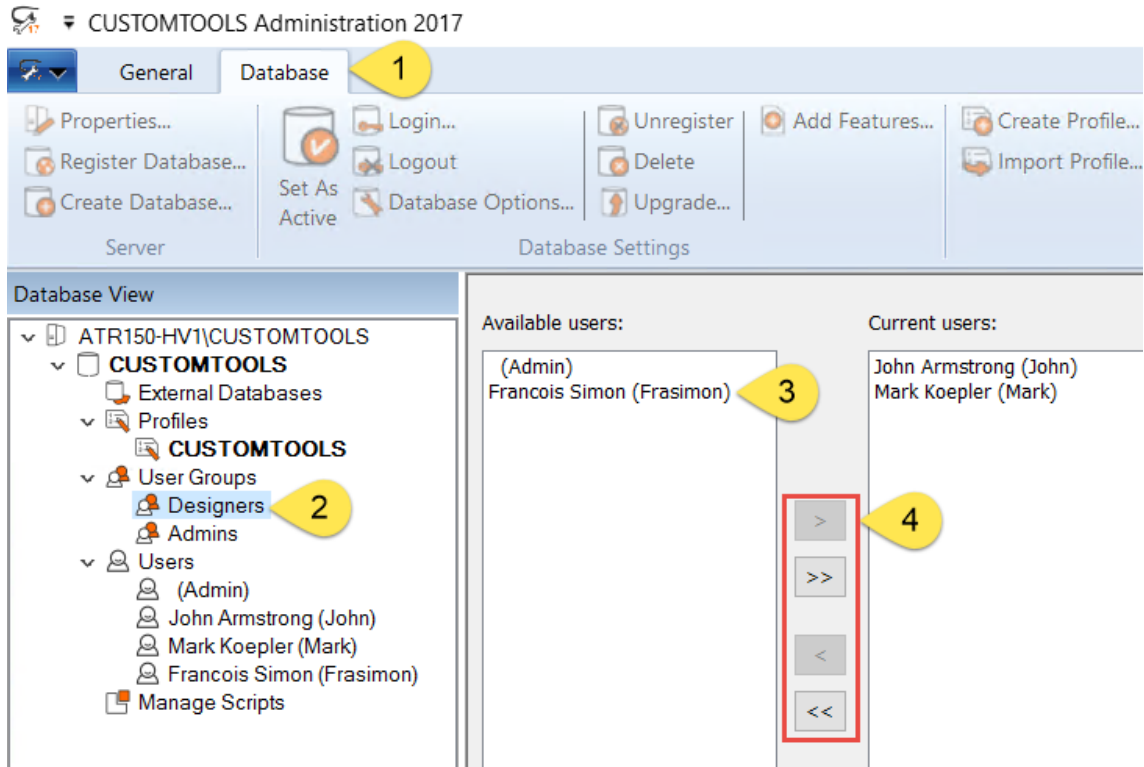3. Click **Create New...**

**User group:** Define the name of the User group.

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Assigning users to a User group

1. Activate the **Database** tab,

2. Select the **User group** (*e.g. Designers*) where to add/remove user,

3. Select the user(s) to be added/removed (*e.g. Francois Simon (FSI)*) from the group,

4. Click on **>**, to add the selected user(s), or **>>**, to add all the available users at once.

Defining the profile rights of the users/user groups
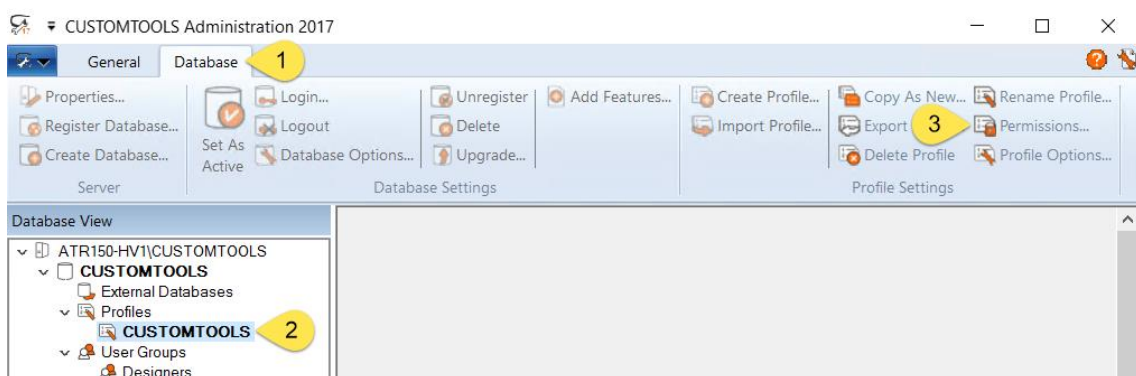
Different rights and permissions can be defined for each **User group** or **User** to manage or access the CUSTOMTOOLS profile. To access the **Profile rights**,

1. Activate the **Database** tab,
2. Select the desired profile,
3. Click **Permissions...** or right click on the desired profile, and select **Permissions**.

Rights and permissions can be defined at the **User group** level or individually for each **User**.

- **Read:** The **user/user group** is allowed to access the profile settings in the CUSTOMTOOLS options but cannot modify them.
- **Use:** The **user/user group** is allowed to use the profile in SOLIDWORKS where all the settings have been defined.
- **Write:** The **user/user group** is allowed to modify the profile settings in the CUSTOMTOOLS options.
- **Set Access:** The **user/user group** is allowed to grant or restrict the profile access rights to other users.
- **Delete:** The **user/user group** is allowed to delete the profile from the **Administration Tool**.