# FOCUS ONREAL DESIGN AUTOMATE THEREST

## CUSTOMTOOLS

## MANAGING PROJECTS

**CUSTOMTOOLS**

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## CUSTOMTOOLS
# Managing your projects

## Introduction

### What does it do?

The projects can be used to ease the management of the SOLIDWORKS documents. CUSTOMTOOLS projects can be configured so that documents are always saved to the right folder and to the right name. In addition, default property values can be automatically loaded, once the project is selected from the Properties pane.

### How does it work?

The user is able to define project structure including sub-projects. Specific file naming and storing conventions can be defined for each project. Default property values can be defined for the assemblies, part and drawing.

### How can you use it?

The projects can be accessed from the Properties pane of CUSTOMTOOLS. Once a project is selected, all the default property values assigned to the project will be automatically loaded. Once the user clicks "OK" on the property the file will be saved to the designated folder. The projects can also be accessed from the Copy and Search functionalities of CUSTOMTOOLS.

**NOTE:** The general project is the default project of CUSTOMTOOLS and cannot be removed. Files that were designed prior to CUSTOMTOOLS will have **No project** assigned by default.

## Add a new project

To add a new project, open the CUSTOMTOOLS **Options** dialog,

1. Select **Project** from the **Profile Options** tab,
2. Click **Add.** The **Project** dialog opens,

1. **Name:** Defines the name of the project as it will appear in the Properties pane (*e.g. Pamet*).
2. **Project number:** Defines a project number (*e.g. 125460*).

   💡 **TIP:** Project name/number can be associated in the file name by using a combination of property.
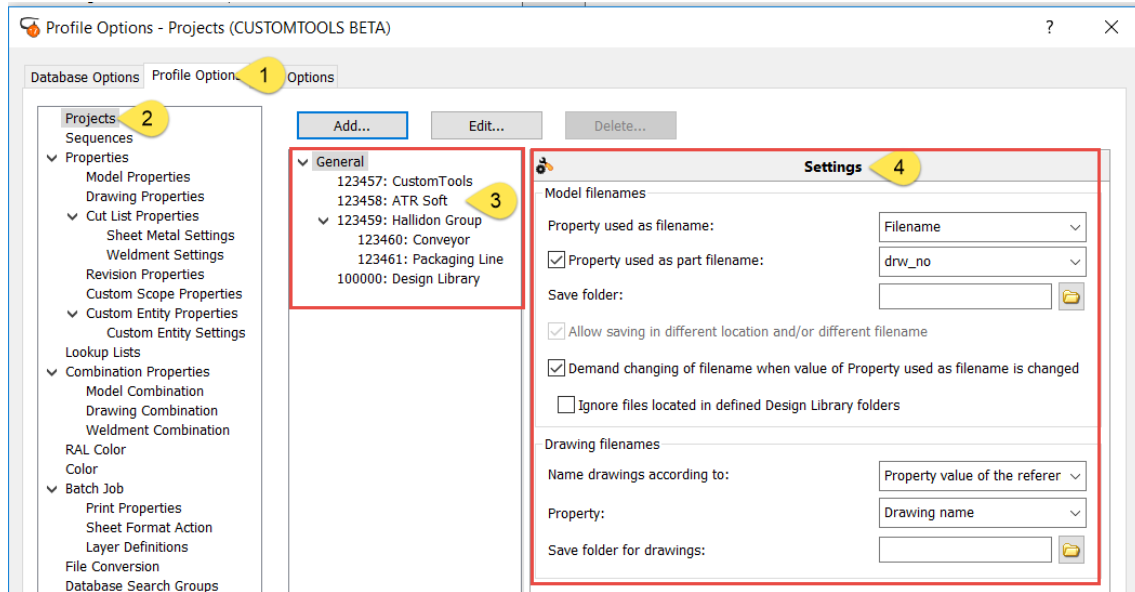
3. **Copy settings from:** Copies the settings of an existing project to the new project. File naming rules, destination folder and default property value will be copied to the new settings of the project.

## Define the file saving rules used by a project

Specific **Save folder** and file **Property used as filename** can be assigned for each project. This allows the user to ease the management of SOLIDWORKS files.
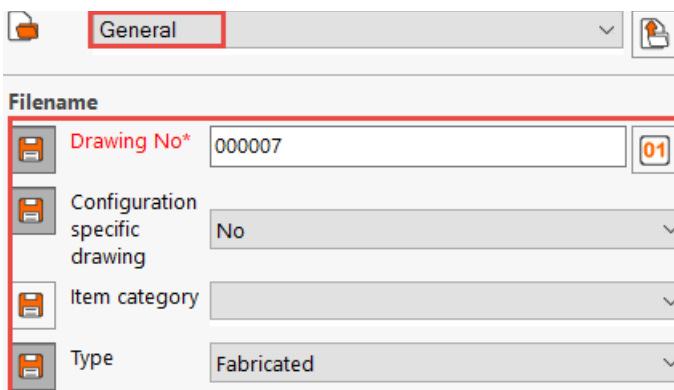
To define the saving conventions used by a project, open the **Options**,

1. From the **Profile Options** tab,
2. Select **Project**, from the tree view.
3. Then select the specific project for which the saving settings are to be defined.
4. Select the **Property used as filename** used to generate a file name. Specify the **Save folder** used by CUSTOMTOOLS to save your Models and Drawings.

## Assign default property values for a project



When a project is selected from the Properties pane of CUSTOMTOOLS, certain property values can automatically be loaded.
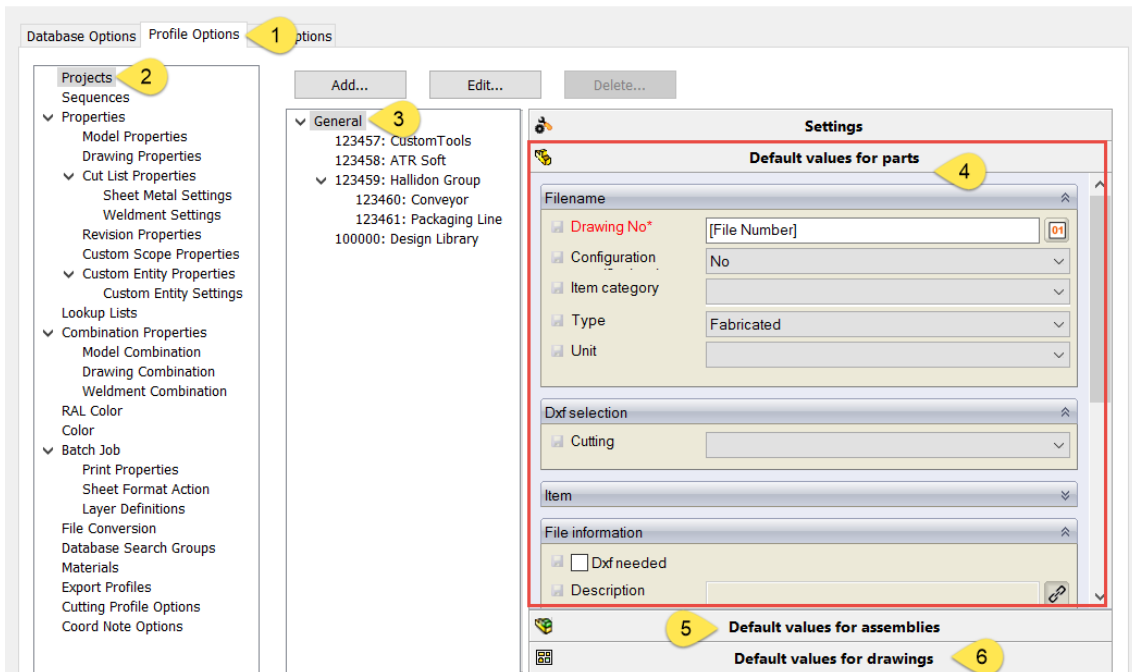
Default property values can be assigned for Parts, Assemblies and Drawings.
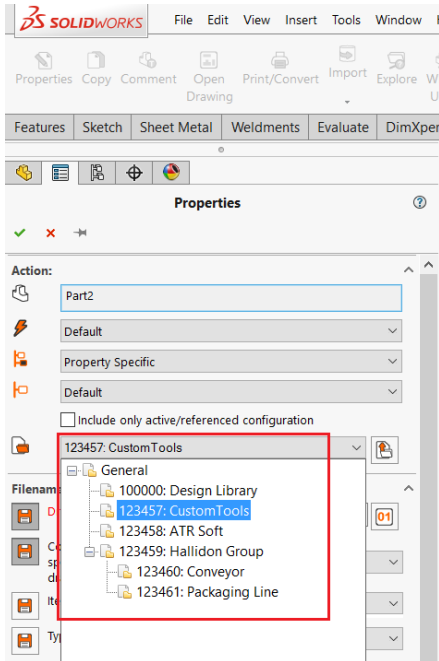
To assign default property values to your project, open the CUSTOMTOOLS **Options** dialog:

1. From the **Profile Options** tab,
2. Select **Project** from the tree view.
3. Select the project where the default property value should be assigned.
4. To define the default custom properties for parts, select **Default Values for parts.** Once selected, the Properties pane appears. Custom properties that should be loaded automatically with the project can be defined.
5. Defines default values to be loaded with assemblies.
6. Defines default values to be loaded with drawings.

## Selecting a project from the Properties pane



Click on **Properties** to open the **Properties pane** of CUSTOMTOOLS. By default, CUSTOMTOOLS, loads the last used Project for new models created in SOLIDWORKS or selects the projects assigned to the model. If no project is used (e.g. for files that were designed before using CUSTOMTOOLS) then the **No Project** is selected.

By clicking on **General**, then all the Projects defined in CUSTOMTOOLS appears in the menu. The desired project can then be selected.

**TIP:** Project default values can be unloaded by clicking on the  icon.