

**FOCUS
ON REAL
DESIGN
AUTOMATE
THE REST**

**CUSTOMTOOLS
USING CUSTOMTOOLS
AND IMPORTING OLD
DESIGN DATA GUIDE**



CUSTOMTOOLS



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Starting CUSTOMTOOLS in SOLIDWORKS

Introduction

What does it do?

Activating the CUSTOMTOOLS add-ins in SOLIDWORKS launches the CUSTOMTOOLS add-ins and allows the user to access the different tools available in SOLIDWORKS (e.g. Batch printing & Conversion, property...).

How does it work?

All the different tools available in CUSTOMTOOLS will be installed and accessible from SOLIDWORKS. CUSTOMTOOLS comes in different packages (Basic, Express, Standard and Professional). The Professional version of CUSTOMTOOLS is always installed and then the limitations for each package are applied after the license has been activated. Functionalities that are not included in certain packages can be accessed but the usage will be restricted.

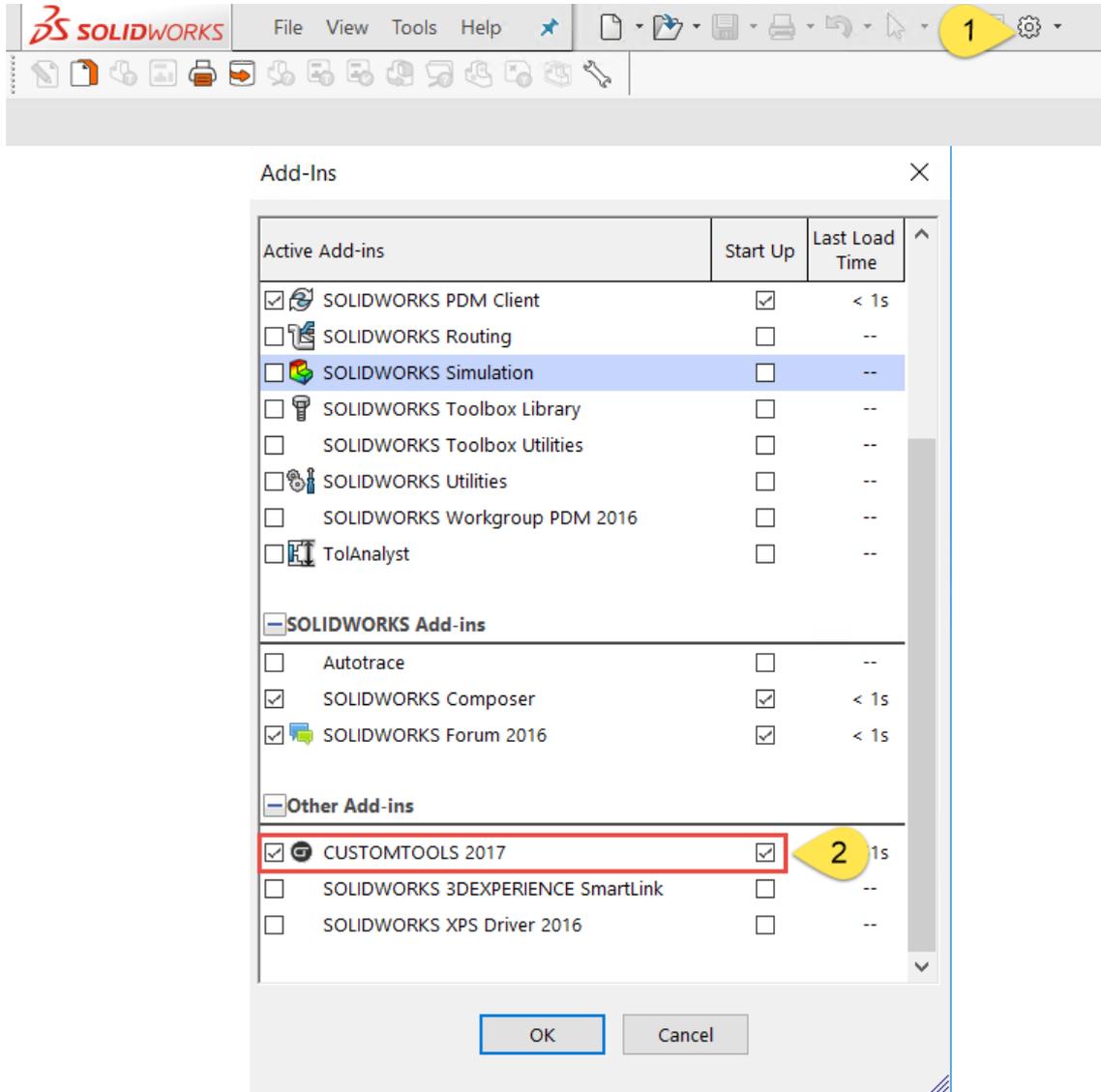
How can you use it?

Once the CUSTOMTOOLS add-in is available in SOLIDWORKS, it can be accessed from the **Command manager** of SOLIDWORKS through the CUSTOMTOOLS menu, or from the SOLIDWORKS Menu (Click **CUSTOMTOOLS** if using earlier version of SOLIDWORKS 2015 or **Tools** -> **CUSTOMTOOLS** if using SOLIDWORKS 2015).



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Activating the CUSTOMTOOLS add in



When starting **SOLIDWORKS**,

1. Open the **SOLIDWORKS Add-ins** dialog,
2. Select **CUSTOMTOOLS 2015**.



NOTE: The **SOLIDWORKS Add-ins** dialog can also be accessed by clicking **Tools**, from the **SOLIDWORKS** menu and selecting **Add-ins** (at the bottom of the menu).

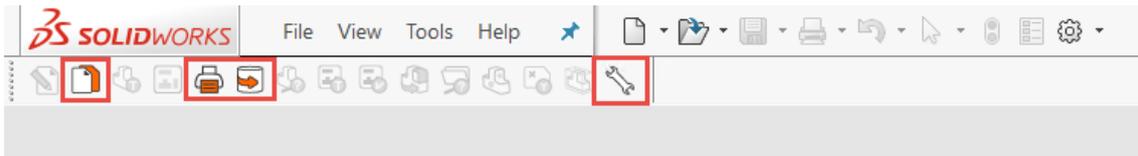


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Using the CUSTOMTOOLS add-ins

When no documents are opened in SOLIDWORKS

Certain functionalities of CUSTOMTOOLS can be accessed if no documents are opened in SOLIDWORKS.

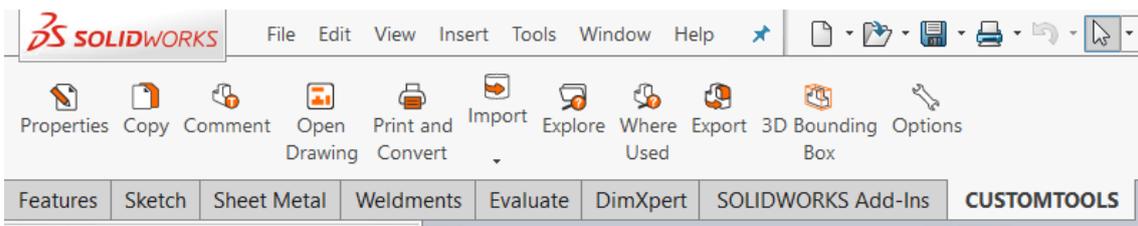


The following functionalities of CUSTOMTOOLS can be accessed:

- **Copy**
- **Print & Convert**
- **Import**
- **Options**

When documents are opened in SOLIDWORKS

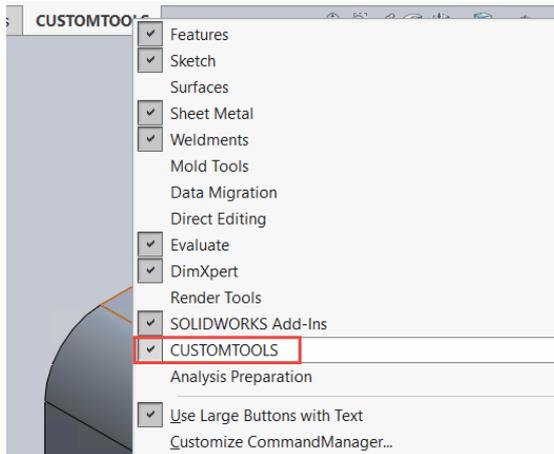
From the CUSTOMTOOLS menu in the Command Manager



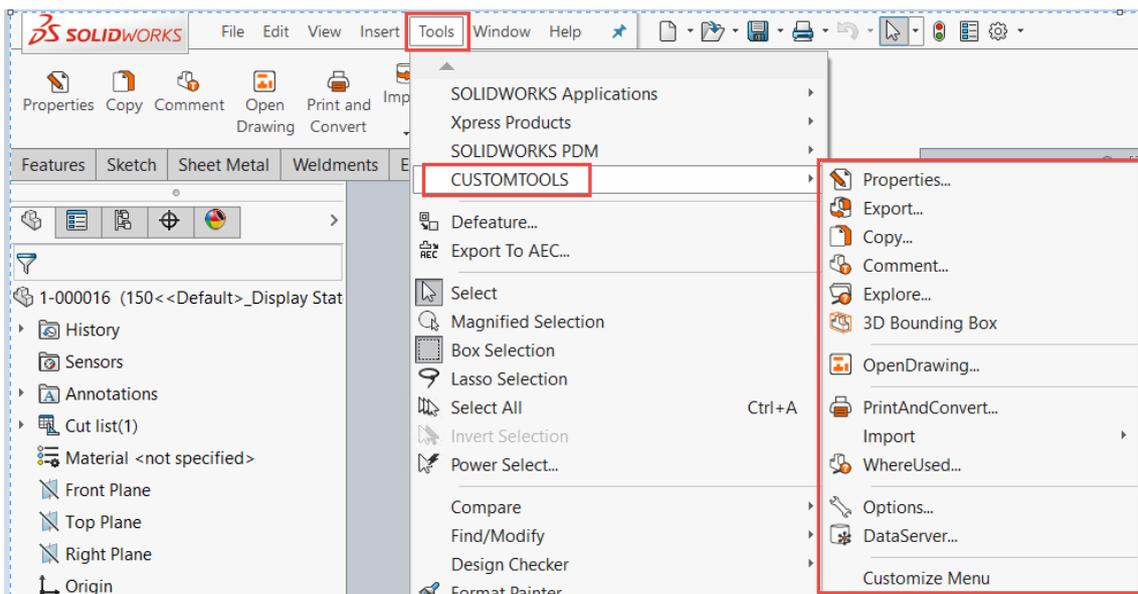
If the CUSTOMTOOLS menu is not available in the Command Manager of SOLIDWORKS, right click on the command manager menu and select **CUSTOMTOOLS**.



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From the SOLIDWORKS Menu

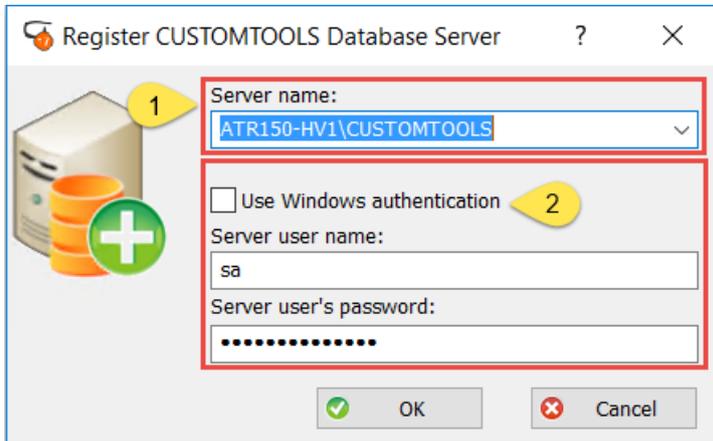


Click **Tools**, **CUSTOMTOOLS**, and then the CUSTOMTOOLS menu appears in SOLIDWORKS 2015 or
Click CUSTOMTOOLS if using earlier release of SOLIDWORKS 2015.



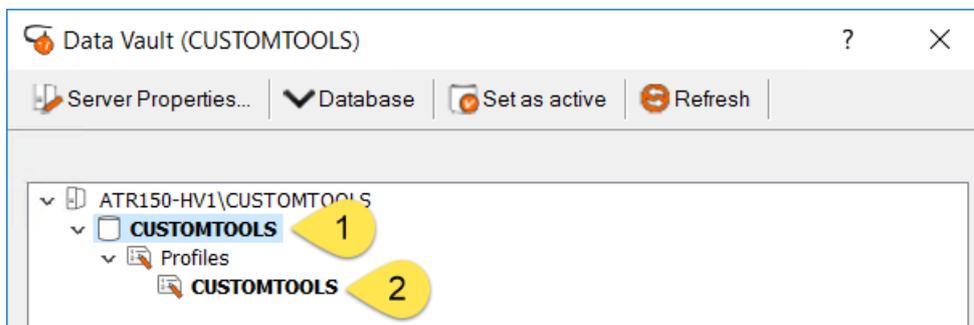
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Selecting the server where the CUSTOMTOOLS database has been installed



Once the CUSTOMTOOLS Add-ins has been activated the **Register CUSTOMTOOLS Database Server** dialog appears automatically.

1. Select the Server where the CUSTOMTOOLS database has been created (in the **CUSTOMTOOLS Administration Tool**) from the **Server name**,
2. Use the defined credential to access it.



Once the Server has been selected:

1. Select the CUSTOMTOOLS database (e.g. *CUSTOMTOOLS Demo*),
2. Select the profile to be used can be selected (e.g. *CUSTOMTOOLS Demo*).



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Log in into the CUSTOMTOOLS database

Once the CUSTOMTOOLS server and database have been selected, the user will be prompted with the **CUSTOMTOOLS Log-in** dialog where he/she needs to log in with his/her user credentials defined in the **Administration Tool**. Click Log in to **Log in** to the CUSTOMTOOLS database.



TIP: Remember the user by selecting the **Remember me** check box in the CUSTOMTOOLS login.

The image shows two overlapping windows. On the left is the 'Edit User' dialog box, which has a title bar with a question mark and a close button. It contains a user profile icon on the left and two main sections: 'Basic information' and 'Optional information'. In the 'Basic information' section, the 'User name:' field contains 'Frasimon' and is highlighted with a red box. Below it is a 'Confirm password:' field. The 'Optional information' section includes an 'Active profile:' dropdown menu, and text input fields for 'First name:' (Francois), 'Last name:' (Simon), and 'Initials:' (FSI). At the bottom are 'Options...', 'OK', and 'Cancel' buttons. On the right is the 'CUSTOMTOOLS' login dialog. It features the 'G' logo and 'CUSTOMTOOLS Early-visibility version' text. Below this, the text 'CUSTOMTOOLS' is displayed in orange. There are two input fields: 'Frasimon|' (highlighted with a red box) and 'Password'. At the bottom are 'Log In' and 'Cancel' buttons, and a 'Remember me' checkbox.



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Chapter 4: Importing old design data into the CUSTOMTOOLS database

Introduction

What does it do?

The import tool can be used to import SOLIDWORKS file references that were designed prior to using CUSTOMTOOLS. The main benefit of importing old design files into the CUSTOMTOOLS database is that it will allow the user to use the CUSTOMTOOLS **Search** functionality.

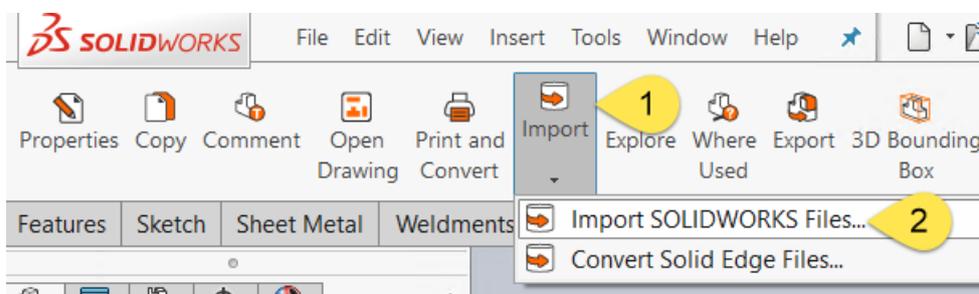


NOTE: In order to batch print or convert old designed files where the child components or drawings are stored into different folders/different name than the referring assembly, the SOLIDWORKS files need to be imported into the CUSTOMTOOLS database in order to be found by CUSTOMTOOLS.

How does it work?

CUSTOMTOOLS will import all the references of the SOLIDWORKS Files that are added to the list of **Files to import**. CUSTOMTOOLS also offers the possibility to search and import the drawings of the listed 3D model.

How can you use it?



To open the Import dialog,

1. Click **Import**,
2. Select **Import SOLIDWORKS Files....**

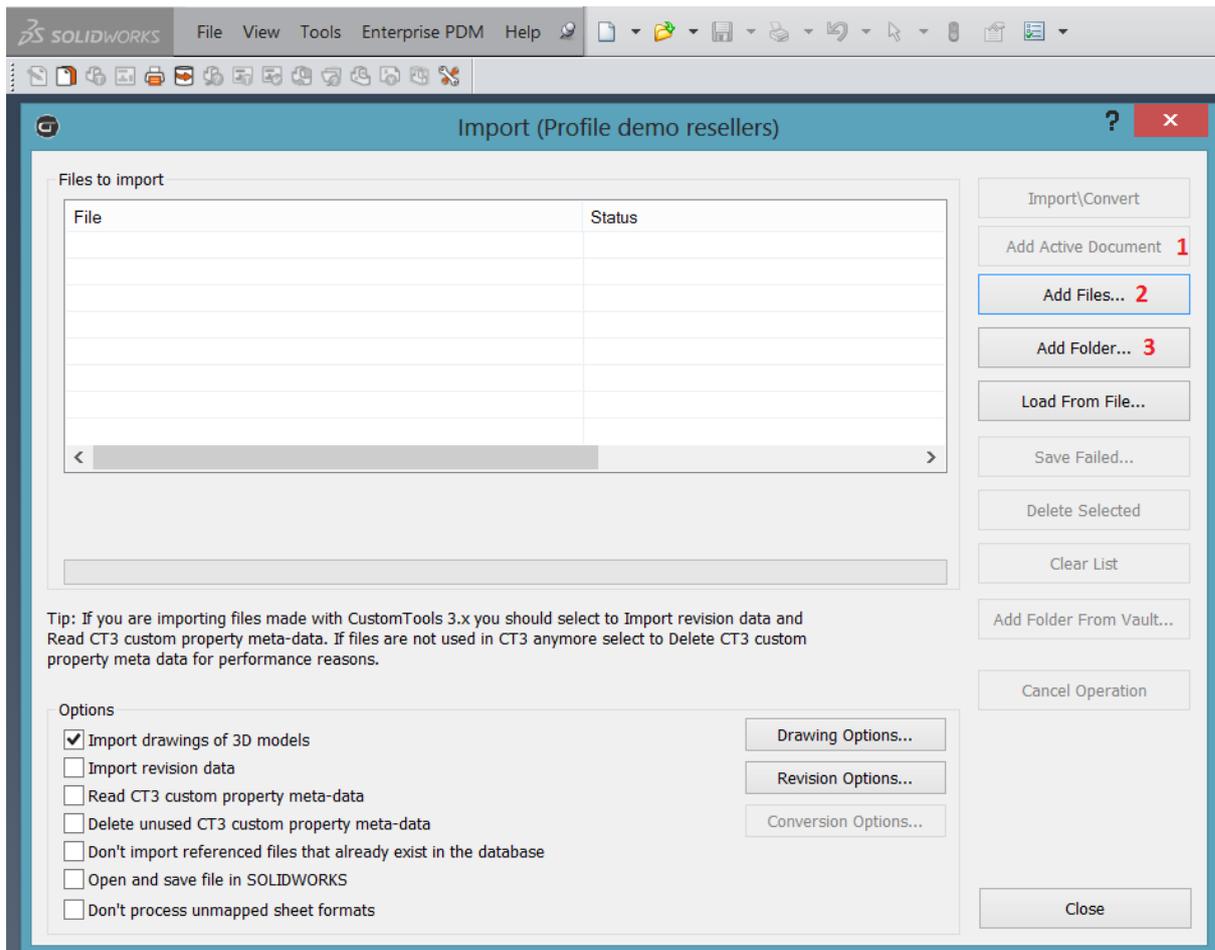


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SOLIDWORKS Files to be imported to the CUSTOMTOOLS database can then be added to the list of **Files to import**.

Using the Import functionality

Selecting the files to be imported to the CUSTOMTOOLS database



1. **Add Active Document:** Adds the assembly or part currently active in SOLIDWORKS and all sub-components child to the list of **Files to import**.
2. **Add files...:** Opens the **Windows Explorer** where the files to be added to the list of **Files to import** can be manually selected.
3. **Add folder...:** Opens the **Browse for folder** dialog where all the SOLIDWORKS files stored in the selected folder will be added to the list of Files to import.
4. **Import/Convert:** Click import and convert to import the files into the CUSTOMTOOLS database.

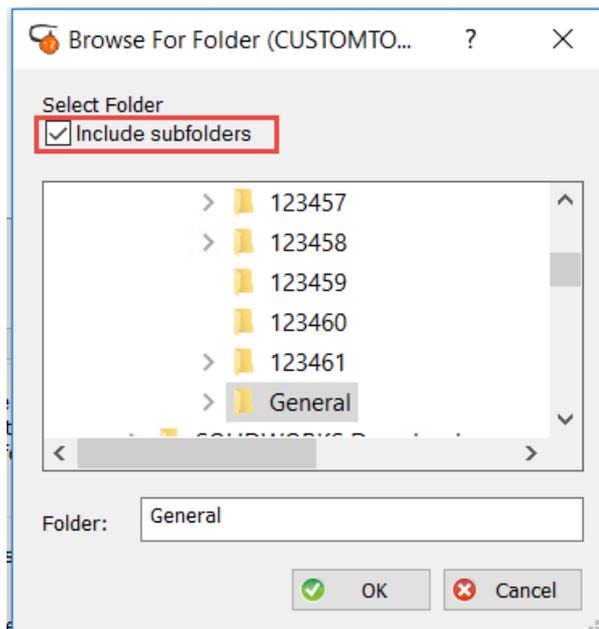


NOTE: Sub-folders can also be included.



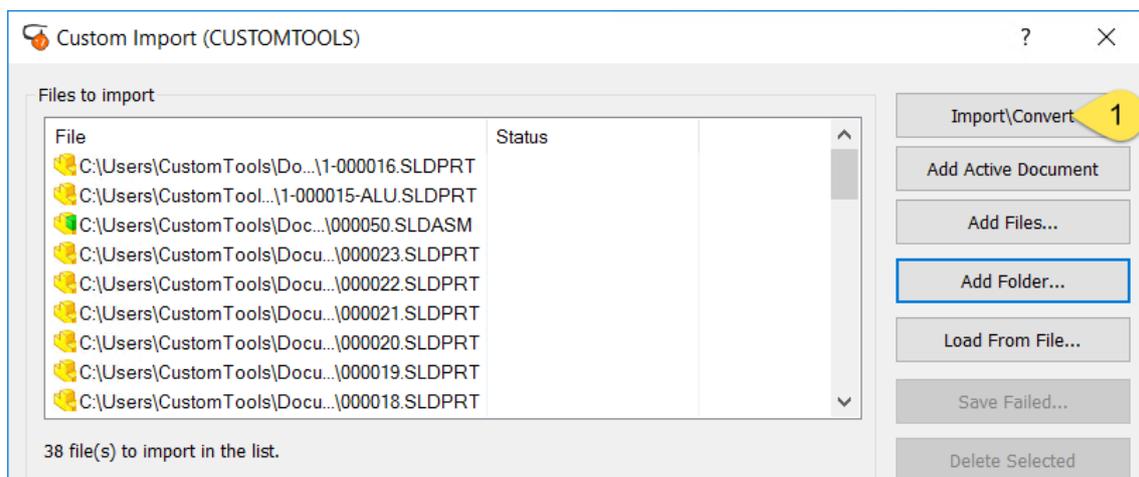
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Importing files from the sub-folders



If the **Add folder...** option has been selected from the **Import** dialog, then the **Browse for folder** dialog opens. Select the **Include sub-folder** check box to add SOLIDWORKS files stored in the sub-folders to the list of **Files to import**.

Importing files into the database



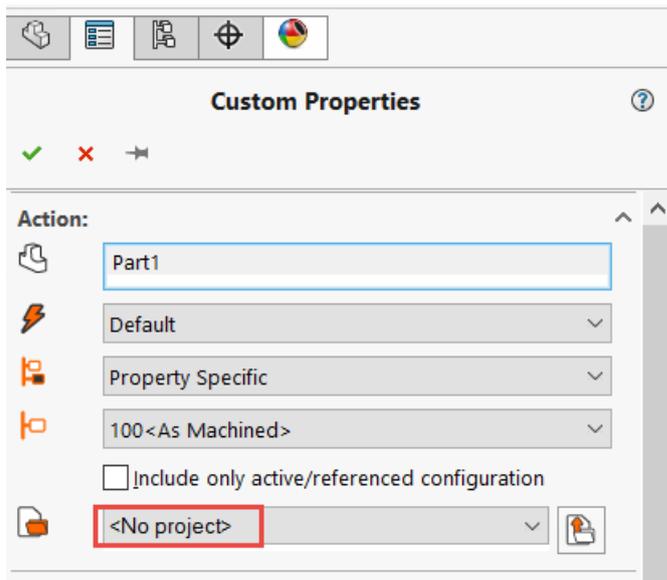
Once the list of files to import has been defined click on the **Import\Convert** button.



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No Project information

Files that have been designed prior to CUSTOMTOOLS and that are imported in the CUSTOMTOOLS will have the **<No project>** information. The **<No project>** option is only available to files that are imported into the CUSTOMTOOLS project and cannot be selected from the list of projects.





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CUSTOMTOOLS Options

Introduction

What does it do?

The CUSTOMTOOLS Options can be used to configure the CUSTOMTOOLS Profile settings (*E.g. custom properties, batch printing & file conversion profile, file naming rules,...*). It can also be used to manage the Database **Options** (*e.g. Manage dictionaries...*) and the User preferences.

How does it work?

The CUSTOMTOOLS options consists of three different tab:

- **Database Options**
- **Profile Options**
- **User Options**

The access to the Options can be restricted based on the users or user groups rights and permissions.

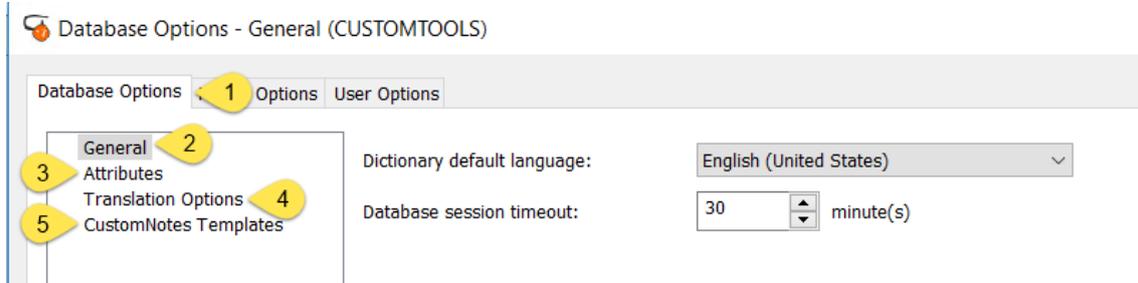
How can you use it?

The Options can be accessed from **SOLIDWORKS** or from the **CUSTOMTOOLS Administration Tool**. The access to the Options can be restricted based on the user. The rights and permissions to access the **Database Options** or **Profile Options** can be defined in the **Administration Tool** for every user or user group.



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Database Options



To access the Database options, open the Options:

1. Activate the **Database Options** tab,

The **Database Options** tab contains the following items:

2. **General:** Select in which language custom properties retrieved from the language dictionaries are saved into the CUSTOMTOOLS database. Define the timeout for the database.
3. **Attributes:** An attribute is the link between the value stored in the CUSTOMTOOLS database and a property. Attributes must be unique.



NOTE: Attributes can be created directly from the Property wizard.

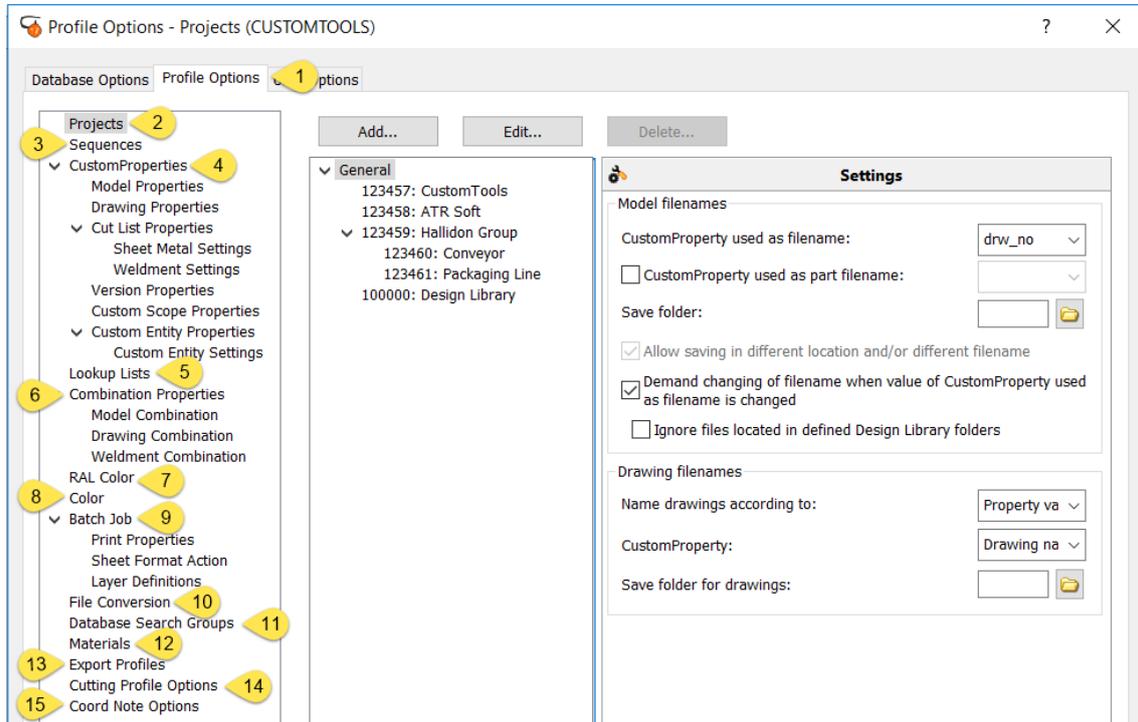
4. **Translation Options:** Manages the dictionaries and languages available to translate custom properties during the batch printing and file format conversion.
5. **CustomNotes Templates:** Manages the property notes to be inserted in the DXF/DWG files.

Profile Options

The Profile Options can be used to configure the different functionalities available in CUSTOMTOOLS. If modifications are applied to the Profile, then they will be immediately available to the users.



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To access the Profile options, open the Options:

1. The **Profile Options** tab is always activated when opening the Options.

The **Profile Options** tab contains the following items:

2. **Projects:** Manages the projects and the file naming and storing rules.
3. **Sequences:** Defines the sequences to be used by a property.
4. **Properties:** Defines the custom properties for:
 - a. **Model Properties:** Configure the Properties pane for Parts & Assemblies.
 - b. **Drawing Properties:** Configure the Properties pane for Drawings.
 - c. **Cut List properties:** Configure the Properties pane for Cut list items.
 - d. **Version properties:** Configure the custom properties available in the revision table.
5. **Lookup Lists:** Defines the different look up lists available for custom properties with the type defined as: Combobox, Editable Combobox or Hierarchical combo.
6. **Combination Properties:** Combines multiple custom properties to create a new property (*E.g. to be used as a property to generate a file name*).
7. **RAL Color:** Manages the RAL color available with a property that retrieve a RAL Color.
8. **Color:** Manages the color available with a property that retrieve a Color.
9. **Batch Job:**



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- a. **Print Properties:** Defines the batch printing profiles available in the Print & Conversion.
 - b. **Sheet Format Action:** Defines the profiles to reload or convert the drawing sheet format.
 - c. **Layer Definition:** Defines the profiles that hide or show certain layers of the drawings during the batch printing or file conversion.
10. **File conversion:** Defines the file conversion profiles available in the Print & Conversion.
 11. **Database Search Groups:** Creates a search in a table of an external database.
 12. **Material:** Manages custom material.
 13. **Export Profiles:** Manages the Excel report profile.
 14. **Cutting Profile Options:** Defines the settings used by the Cutting profile to create a new drawing sheet containing a flatten view ready to be converted to DXF/DWG.
 15. **Coord Note Options:** Defines the settings used to insert coordinates into the Drawings.

User options

Each CUSTOMTOOLS users defined in the **AdministrationTool** is able to define its own preferences.



To access the User Options, open the **Options:**

1. Activate the **User Options** tab,

The **User Options** tab contains the following items:

2. **General:** Selects the language for the User Interface and Dictionaries of CUSTOMTOOLS. Configure how the Search results will be displayed.
3. **File Operations:** Defines settings when saving a SOLIDWORKS Documents with CUSTOMTOOLS.