

CUSTOMTOOLS Server Move

This guide describes the steps involved in moving a CUSTOMTOOLS Server from one PC/VM to a new one.

CUSTOMTOOLS Architecture

Below is a diagram of a typical CUSTOMTOOLS environment with networked CUSTOMTOOLS licenses.

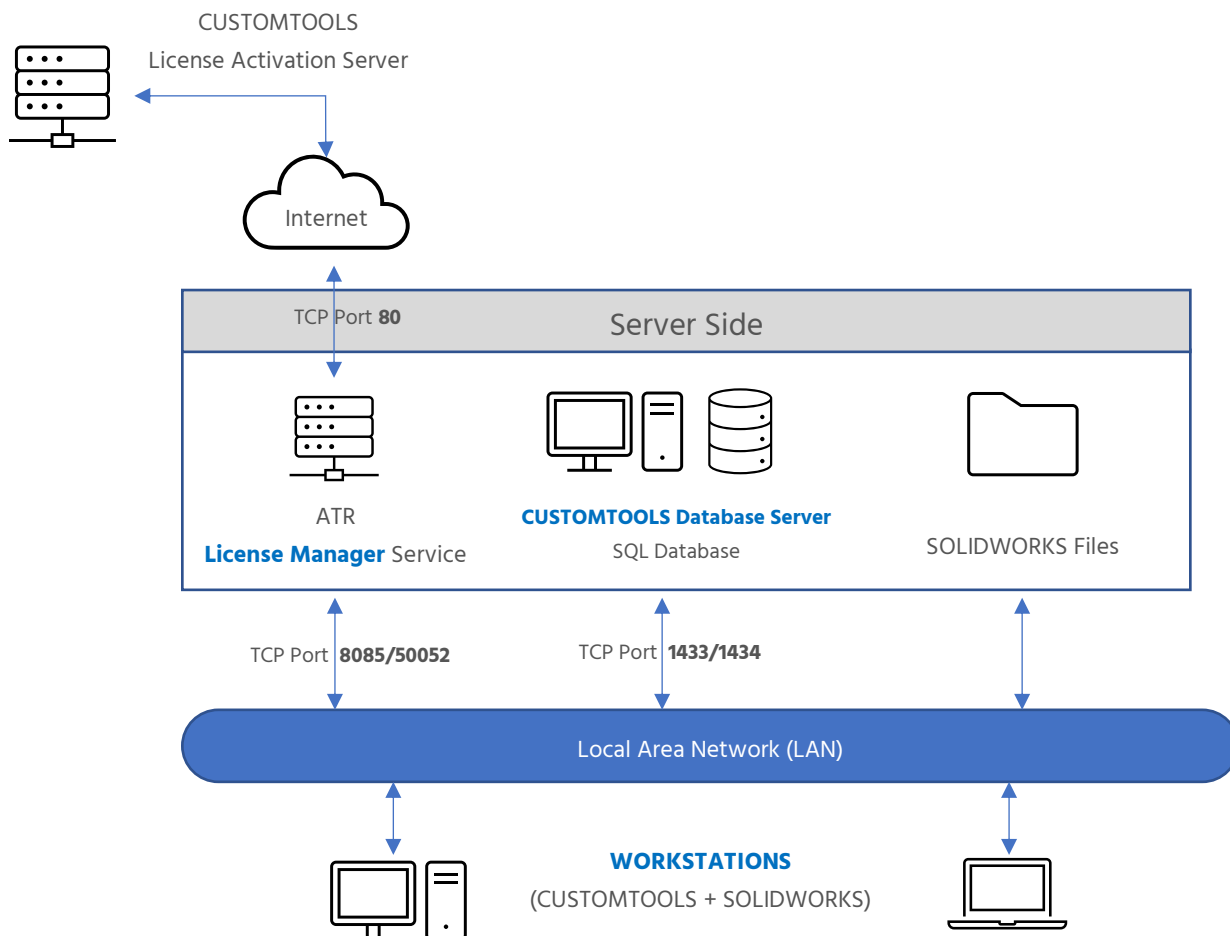


Figure Description

Server Side	Part of the CUSTOMTOOLS environment containing all the necessary server-side components. All components could be installed to one server machine.
License Manager Service	Windows background service that is used to manage and monitor the floating CUSTOMTOOLS network licenses.
CUSTOMTOOLS Database Server	Microsoft SQL Server instance used as the database engine for the CUSTOMTOOLS database. *Microsoft SQL Server 2014 Express is included in CUSTOMTOOLS and will be installed automatically while installing the CUSTOMTOOLS database if the SQL Server does not already exist.
SOLIDWORKS Files	Specific location for the SOLIDWORKS files used by the workgroup.
License Activation Server	Server machine on CUSTOMTOOLS manufacturer side that is used to activate/transfer the purchased licenses.
Internet	CUSTOMTOOLS licenses are used to be activated via internet.
Local Area Network (LAN)	The workstations and servers are usually connected using local area network.

Server Move Details

1. Move the database.
 - a. Install SQL Server on the target system.
 - b. Backup the CUSTOMTOOLS database on the source system.
 - c. Copy the backup file to the target system.
 - d. Restore the database on the target system.
2. Install CUSTOMTOOLS Server Components.
 - a. Run the CUSTOMTOOLS installer executable.
 - i. Example: CUSTOMTOOLS.2021.SP1.64bit.exe
 - b. Select the "Custom" installation type (NOT "Trial")

From the Components page select the following: (

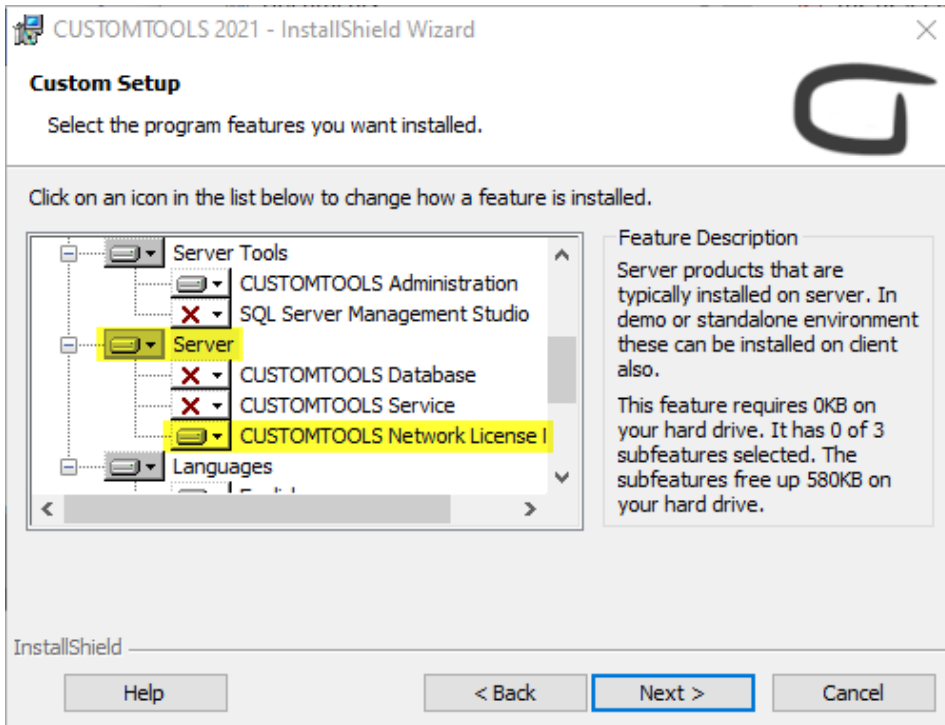
- c. Reference Image 1)
 - i. Server Tools
 1. CUSTOMTOOLS Administration (Optional)
 - ii. Server
 1. CUSTOMTOOLS Server
 2. CUSTOMTOOLS Network License Manager
- d. Finish the installer.

3. Move the License Manager.
 - a. On the source system open the CUSTOMTOOLS Network License Manager (ATR License Manager)
 - b. Select the “Manage Licenses” button.
 - c. Select “Transfer License” and finish the wizard to remove it from the source system.
 - d. On the target server, open the CUSTOMTOOLS Network License Manager (ATR License Manager).
 - e. Select the “Manage Licenses” button.
 - f. Select the Activate License option and enter all the required fields.
 - i. Serial number must be in this format: 0000 0000 0000 (space required)
 - ii. A valid Email address is required.
 - g. Finish the wizard.
4. Register the moved database.
 - a. Register the SQL Server
 - i. Open the CUSTOMTOOLS Administration client.
 - ii. If “No CUSTOMTOOLS Licenses Found” message appears, the target server needs updated in the client registry.
 1. HKEY_LOCAL_MACHINE\SOFTWARE\ATR
Soft\CUSTOMTOOLS\Security\LicenseManager Machine
 - iii. Select “Properties...” from the Database Tab
 - iv. Select/Enter the SQL Server name (and instance), and a SQL user account.
 1. Server Name: syntax is <Server>\<instance>
 - a. Default instance syntax: <server>
 - b. SQL Express instances are typically: <server>\SQLEXPRESS
 2. “ct_admin” user is created upon installation. Username and password are the same.
 3. Account must have “Db Owner” rights to the CUSTOMTOOLS database.
 - v. Press OK to register the server.
 - b. Create a temporary database. (This is necessary to register the CUSTOMTOOLS DLLs with the SQL Server. Skipping this step will result in login and other errors when trying to use the moved database.)
 - i. Select the database from the Database View tree and press “Create Database...”

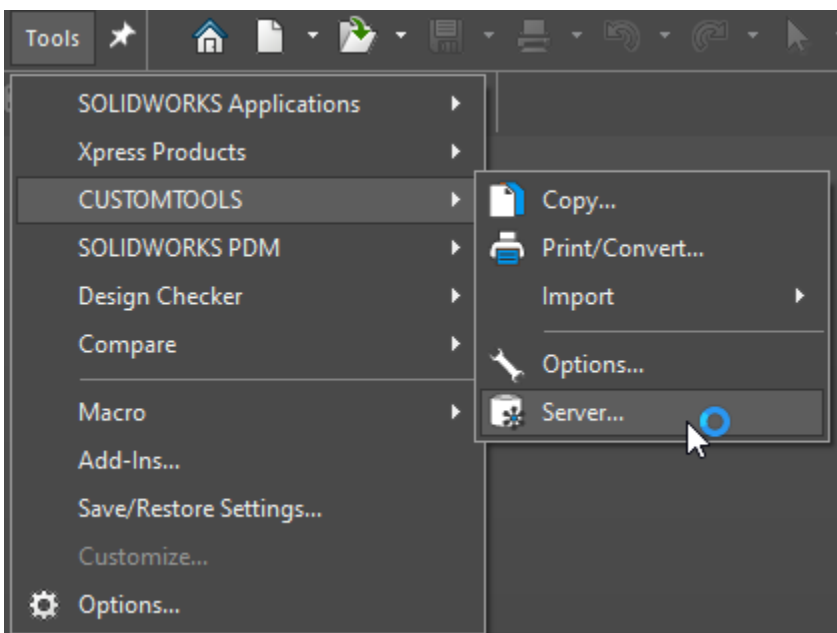
- ii. Press Next.
 - iii. Give the database a name that will identify it as the temporary database.
 - iv. Clear the check boxes, leaving only “Set the database as the active database” checked.
 - v. Press Next
 - vi. Press Finish
- c. Register the restored database.
- i. Select the server in the tree under “Database View” and select “Register Database...”
 - 1. Select the restored database from the list.
 - 2. Keep “Set as active” checked.
 - 3. Press OK to register.
 - ii. Select the restored database from the Database View tree and press “Login...”
 - 1. “Admin” defaults with no password
- d. Delete the Temporary database.
5. Update Remaining Clients.
- a. Change the “LicenseManager Machine” registry key to reference the target server.
 - b. Point the CUSTOMTOOLS for SOLIDWORKS add-in to the new database server.
 - i. Open SOLIDWORKS and turn on the CUSTOMTOOLS add-in.
 - ii. From “Tools” menu select CUSTOMTOOLS, then “Server...” (Reference Image 2)
 - iii. Click Server Properties
 - 1. Enter the same information as step 4.a.iii
 - 2. Press OK
 - iv. Select Database>Register
 - 1. Select the same restored CUSTOMTOOLS database as step as 4.a.v.1

Reference Images

Reference Image 1



Reference Image 2



Release Note

This document and screen captures were created using the 2021 SP1 release of CUSTOMTOOLS.

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Updated: May 4, 2023 (Chris Cook)