

# HawkWare CustomTools Installation Guide

# Hawk Ware™



**HAWK RIDGE SYSTEMS**



**CUSTOM TOOLS**

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[www.hawkridgesys.com](http://www.hawkridgesys.com) | [info@hawkridgesys.com](mailto:info@hawkridgesys.com)

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# INTRODUCTION

## About this Document

The CustomTools installer incorporates Windows Installer technology in the CustomTools 2013 version. This document guides you through the CustomTools installation with this installer.

### Intended Audience

This document is for all users with any or no experience with the earlier CustomTools products. The main purpose of this document is to get the users familiar with the installation process for CustomTools.

### Windows® 7

Screenshots mostly used in this document are taken by using CustomTools 2013 SP2 installer running on 64-bit Windows 7 operating system. If you are using the Windows XP or Windows 8 operating system, you may notice some differences in menu and window appearances. Those differences do not affect performance of the software installation.


### Windows® 8

Some of the screenshots used in this document are taken by using the 64-bit Windows 8 operating system.

### Windows Server® 2008 R2

Screenshots used in the pre-requisites installation on Windows Server are taken by using the CustomTools 2013 SP2 installer running on 64-bit Windows Server 2008 R2 operating system. If you are using the Windows Server 2012 operating system, you may notice some differences in appearance of the menus and windows. Those differences does not affect to performance of the software installation.

## Using this Document

Convention	Meaning
<b>Bold</b>	Any CustomTools command, menu item, or example file
<i>Italic</i>	Refers to books and other document or emphasizes text
	Tip, Note
<u><a href="#">Blue Underlined</a></u>	Hyperlinks to CustomTools help, other internet reference or a Hands-on example



# Getting Started

The CustomTools installer program is still provided via download on the CustomTools.Info site using information provided by our Order Management team when purchased.

To get your installer follow these steps:

- Browse to <http://CustomTools.info>
- Hover over the **LOGIN** link in the upper right and select **CUSTOMERS**.
- Enter the Company Name and Serial Number as they were provided by our Order Management team. The Serial Number is 12 digits, in 4 digit groups separated by spaces (0000 0000 0000).
- Click **ENROLL** to log in.
- Select the appropriate installer for your target OS (32 or 64-bit version). The newest released versions are at the top of the list.

## System Requirements

For the CustomTools SOLIDWORKS Add-in, you can refer to the SOLIDWORKS® system requirements because CustomTools does not cause any differences in system requirements defined by SOLIDWORKS.

For CustomTools Viewer and CustomTools Administration, please see the following tables for the system requirements.

### Hardware

#### CustomTools have the following hardware requirements

<b>Processor</b>	Intel® and AMD processor <b>NOTE:</b> Intel Pentium 3, AMD Athlon and Athon XP processors are not supported. The CPU need to have support for SSE2 (Streaming SIMD Extensions).
<b>System Memory (RAM)</b>	512MB in minimum. 1024MB (=1GB) recommended.
<b>Graphics</b>	A certified OpenGL workstation graphics card and driver.
<b>Hard Disk Space</b>	30MB
<b>Devices</b>	Keyboard Mouse or other compatible pointing device
<b>Network</b>	Standard network adapter and access to a local area network (LAN)
<b>Other Requirements</b>	Microsoft .NET Framework 3.5 or newer Microsoft Visual C++ 2008 Redistributable Package SOLIDWORKS eDrawings*

\* The SOLIDWORKS eDrawings is required only by the CustomTools Viewer.

### Supported Operating Systems

- Windows Vista, Windows 7, Windows 8, Windows Server 2003, Windows Server 2008, Windows Server 2008 R2, Windows Server 2012



## CustomTools Installer

The CustomTools installer is completely based on the Windows Installer making the installation work similarly to most other applications available for the Windows operating system.

CustomTools installation uses one of two (2) installer applications. The installer applications are differentiated by the operating system type so, you need to use only one of the installers on each workstation based on the system type.

### System Type Based Installers

The following installer applications are included in the CustomTools installation media:

- CustomTools.2013.SPx.32bit. CustomTools installer for the x86 (32-bit) operating systems.
- CustomTools.2013.SPx.64bit. CustomTools installer for the x64 (64-bit) operating systems.

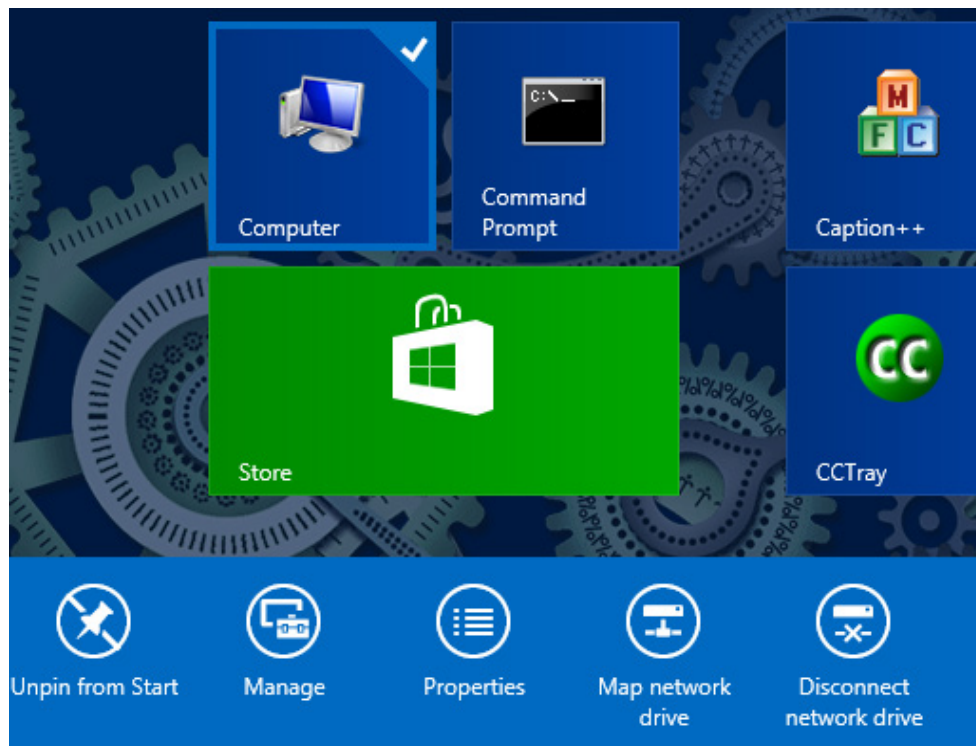
#### *How to check the system type*

To start the CustomTools installer, run the executable file from the installation media you have. Select the correct installer based on your System type.

Click **Start**, right-click **Computer** and select **Properties** to see the basic information about your computer including the operating system information. You can find the **System type** from under the **System** group in the **System** dialog box.



**TIP:** In **Windows 8** operating system, open the **Start** screen, right-click **Computer** and then click the **Properties** button located at the bottom of the screen.



# CustomTools Installation Process

Once you start the CustomTools installer application, the InstallShield Wizard appears.

## Language Selection

The very first step of the CustomTools installation is the language selection. The following languages are available:

- Chinese (Simplified)
- Chinese (Traditional)
- Czech
- English (United States)
- French (Standard)



By default, the selected language is English (United States).

A language selected here is also selected by default in the CustomTools user interface after you install the desired CustomTools products.

## Pre-requisites Installation

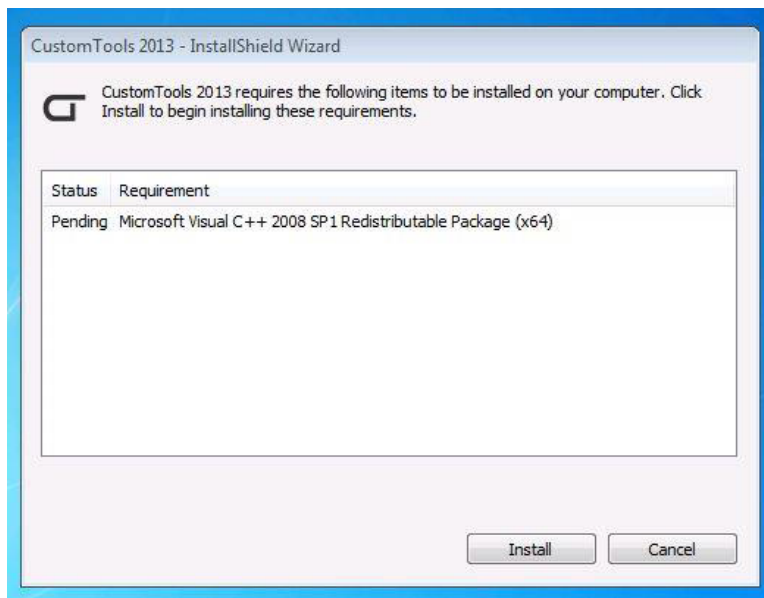
Before the CustomTools product installation begins, the installer checks for the necessary pre-requisites, and prompts you to install any missing components.

You must have the following components installed before installing CustomTools:

- Microsoft .NET Framework v3.5 or newer
- Microsoft Visual C++ 2008 SP1 Redistributable Package

Components mentioned above are automatically detected by the CustomTools pre-requisites check.





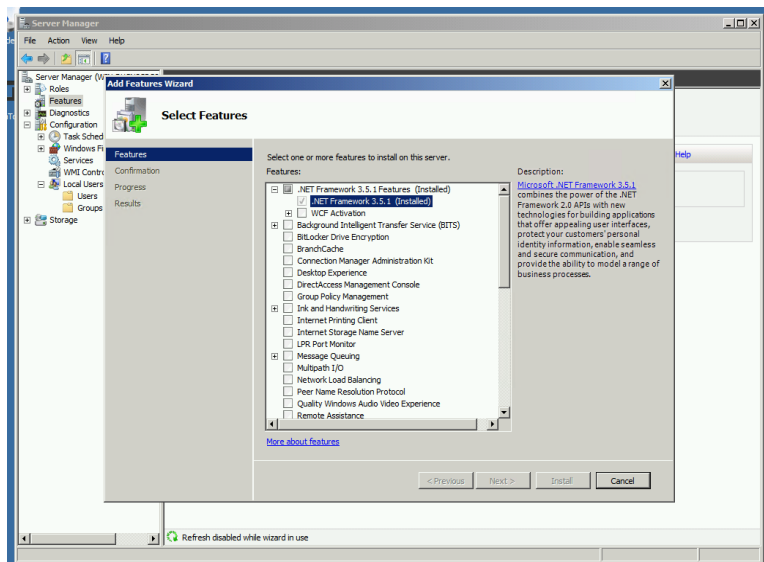
In the above example workstation, the pre-requisites detection found the Microsoft .NET Framework already installed but the **Microsoft Visual C++ 2008 SP1 Redistributable Package** missing. Before the CustomTools installation begins, the missing pre-requisite will be installed.

If you have all necessary pre-requisites you will not see the window above. The CustomTools installation begins instead.

#### Note related to Windows Server

If you are not installing CustomTools into a **Windows Server** operating system, you can skip this sub topic and proceed to the next one.

In the Windows Server operating system, the **.NET Framework** installation can be done through the **Add Features Wizard** located in the **Server Manager**.



For the further information, please see the **Microsoft TechNet** topic called Adding Server Roles and Features.



## CustomTools License Agreement

The first step on the CustomTools installation is the CustomTools End User License Agreement. To continue installation, read through and accept the license agreement.

## Customer Information

The next step is to fill out the following customer information:

- **User name** – Name of the workstation user. The user name is automatically detected based on the Windows user account, but you can type a different user name if necessary.
- **Organization** – Company name where CustomTools is used.
- **Serial Number** – Your CustomTools serial number.

If you want to evaluate CustomTools, click the **Get Demo Serial** button to retrieve an evaluation license for CustomTools. The evaluation license is valid for 30 days.

## Setup Type

The Setup Type page is used to select the desired way to install CustomTools. You have the following options to choose from:

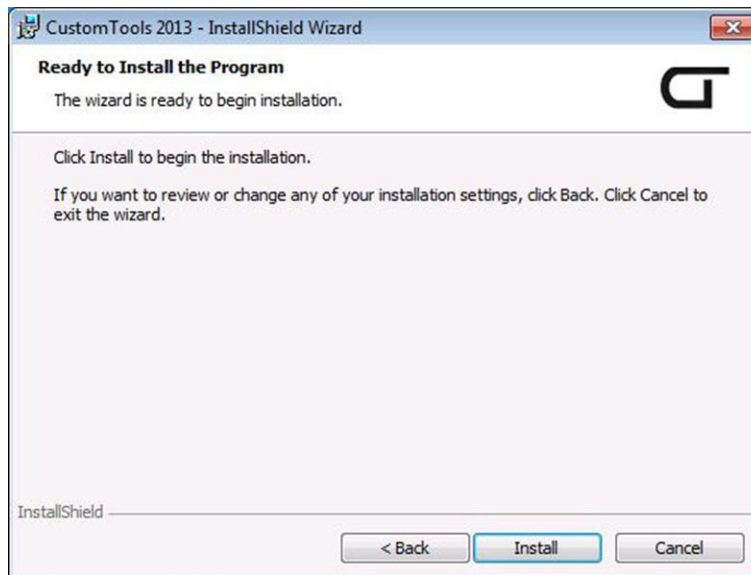
- **Trial** – Select Trial installation to install all components necessary to try CustomTools. The Trial installation is a good choice for evaluation purposes.
- **Custom** – Select Custom installation to choose the components to be installed. The custom installation is recommended if you have an environment where the server computer is separated from the designer workstations.





## Trial Installation

When you perform a trial installation, select **Trial** and click **Next** in the Setup Type page. The following page appears. Click **Install** to start the installation process.



## Component Selection

Component selection does not appear at all when performing a trial installation. All necessary components are automatically installed. The trial installation installs the following CustomTools components to the workstation:

- CustomTools SOLIDWORKS add-in
- CustomTools Administration
- CustomTools Viewer
- CustomTools Database
  - A database called CustomTools Demo is automatically created into the SQL Server installed by this component on the trial installation.

A trial installation installs the CustomTools products into the following path:

C:\Program Files\ATR Soft\CustomTools 2013



## Custom Installation

When performing a custom installation, the next step is to select the desired CustomTools components to be installed into the workstation or into the server computer.

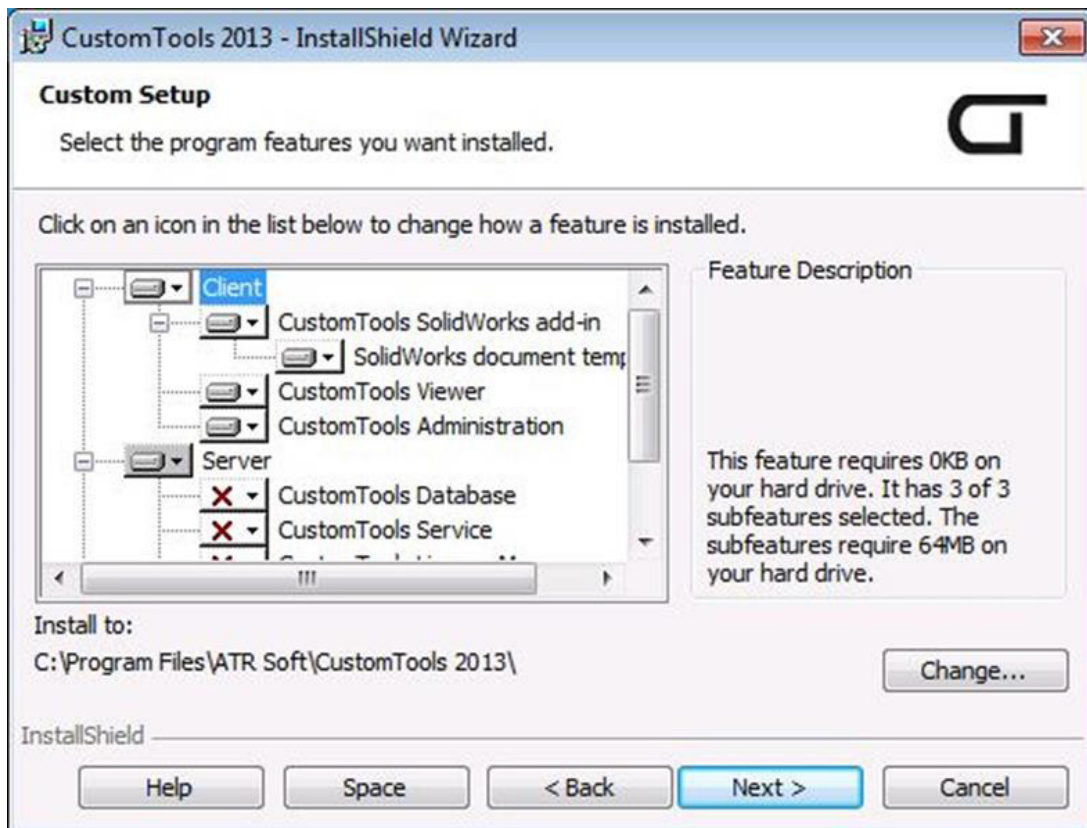
CustomTools installer includes several components for the client workstations and for the server computer. CustomTools components are separated by categories based on their purpose. Select the component based on the purpose of the target computer.

If you have a small environment where one workstation is used both as a server and as a design workstation, you can choose the necessary components from all categories.

To enter to the component selection of the custom installation, select **Custom** in the Setup Type page and then click **Next**.

## Component Selection

Select the desired components with help from the Custom Setup page shown in the following screenshot.



The following components are available while performing a custom installation:

**Client** (recommended for the client workstations)

- CustomTools SOLIDWORKS add-in
- SOLIDWORKS document templates
- CustomTools Viewer
- CustomTools Administration

**Server** (recommended for the server computers)

- CustomTools Database
- CustomTools Service
- CustomTools License Manager

**Tools**

- CustomTools Profile Converter
- CustomTools CustomImport Standalone

**Languages**

- English
- Chinese (Simplified)
- Chinese (Traditional)
- Czech
- French
- Hungarian

All Client components are selected by default on the custom installation. Change the component selections based on the workstation type.

On the custom installation, you can choose the installation folder for the CustomTools products. By default the following installation path is defined:

C:\Program Files\ATR Soft\CustomTools 2013

English and any language selected on the installation's first step are selected by default. You can add or remove the desired languages under the **Languages** category.

## System Admin Password



**NOTE:** This step does not apply to installation where the **CustomTools Database** component is not selected in the **Custom Setup** page.

If you selected a component called **CustomTools Database** to be installed, the next step from the component selection sets a password for the System Administrator user (sa) of the SQL Server to be installed.



**CustomTools 2013 - InstallShield Wizard**

**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:

InstallShield

< Back   Next >   Cancel

The system administrator password must meet the Microsoft SQL Server password policy. See an article called Password Policy in the **Microsoft TechNet** for the further information about the SQL Server password policy.

## Database Server



**NOTE:** This step does not apply to installation where the **CustomTools Database** component is selected in the **Custom Setup** page.

After selecting the necessary components without the **CustomTools Database**, define the database server to be used with CustomTools.

**CustomTools 2013 - InstallShield Wizard**

**Database Server**  
Select database server and authentication method

Database server that you are installing to:  
SERVER\CUSTOMTOOLS

Connect using:  
 Windows authentication credentials of current user  
 Server authentication using the Login ID and password below

Login ID: sa  
Password: [Masked]

InstallShield

< Back   Next >   Cancel

The database server refers to a server or workstation with SQL Server already installed. If you log in with SQL Server authentication, please ensure that the **SQL Server Authentication** is enabled in the SQL Server security options.



**TIP:** You can use the SQL Server Management Studio to modify the SQL Server security options.

## Ready to Install

Once you define the sa password (see System Admin Password in page 14), or define the existing SQL Server to use with CustomTools (see Database Server in page 15), you are ready to start the CustomTools installation.



# License Activation

Once installed you must activate your CustomTools license on initial startup of any CustomTools product. The CustomTools **License Activation Wizard** appears automatically on any CustomTools product startup to assist with activation. The Administration and SOLIDWORKS add-in clients activate independently.

## Activating the License

Use the following instructions to activate your CustomTools license using the **License Activation Wizard**.

## Customer registration

The activation wizard appears with the customer registration information.

Manage CustomTools Licenses

Manage CustomTools Licenses

Serial number: XXXX XXXX XXXX

Email: example@domain.com

First name: Eric

Last name: Example

Phone: +3581234567

Please choose the action to perform:

- Activate license
- Transfer license
- View currently activated licenses

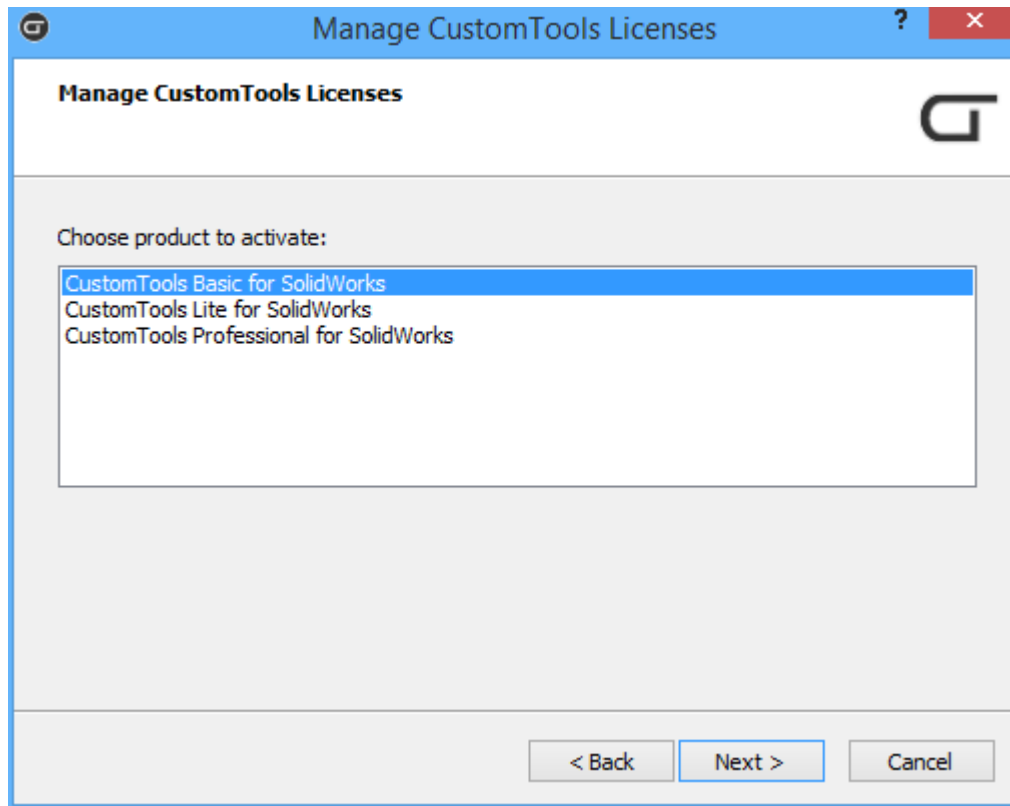
< Back    Next >    Cancel

Any information requested by the registration will not be given to any 3rd party.



## Select product to activate

Once the requested information is entered in the customer registration page, click Next to proceed to the product selection page. The product selection page is used to select the CustomTools product to activate.



Products available in the product selection page depend on the CustomTools product you launched the license activation from. The screenshot above was taken from the product selection page using the HawkWare CustomTools SOLIDWORKS Add-in Client activation. You will see different options from the Administration activation. You will be prompted with the license activation again with each CustomTools product you have not activated the moment you start it for the first time. Follow these same steps for each product you activate.

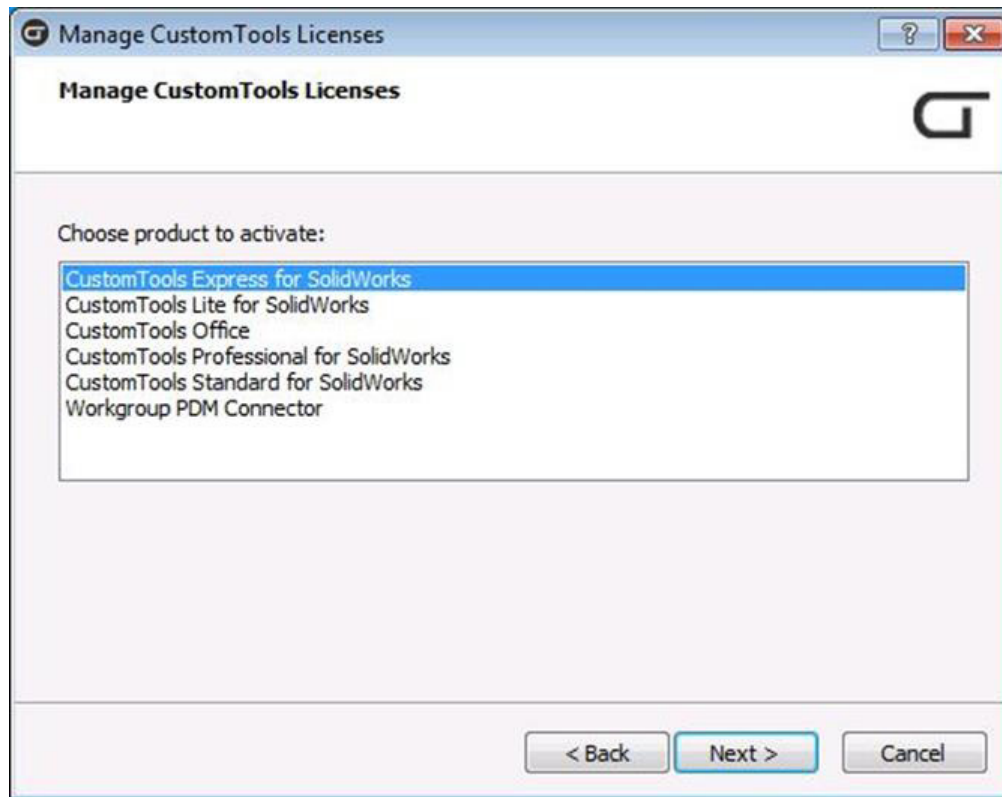


**TIP:** If you purchased a CustomTools Office level of license, then it does not matter which CustomTools product you launch to activate the license. To activate the CustomTools Office license, select **CustomTools Office** from the product list and then click **Next** to proceed.

If you did not purchase a CustomTools Office level of license, just select the product you started the activation from and then click **Next** to proceed. In that case you face the license activation again with each CustomTools product you have not activated at the moment you start it for the first time. To activate rest of the products, you can use these instructions with them as well.

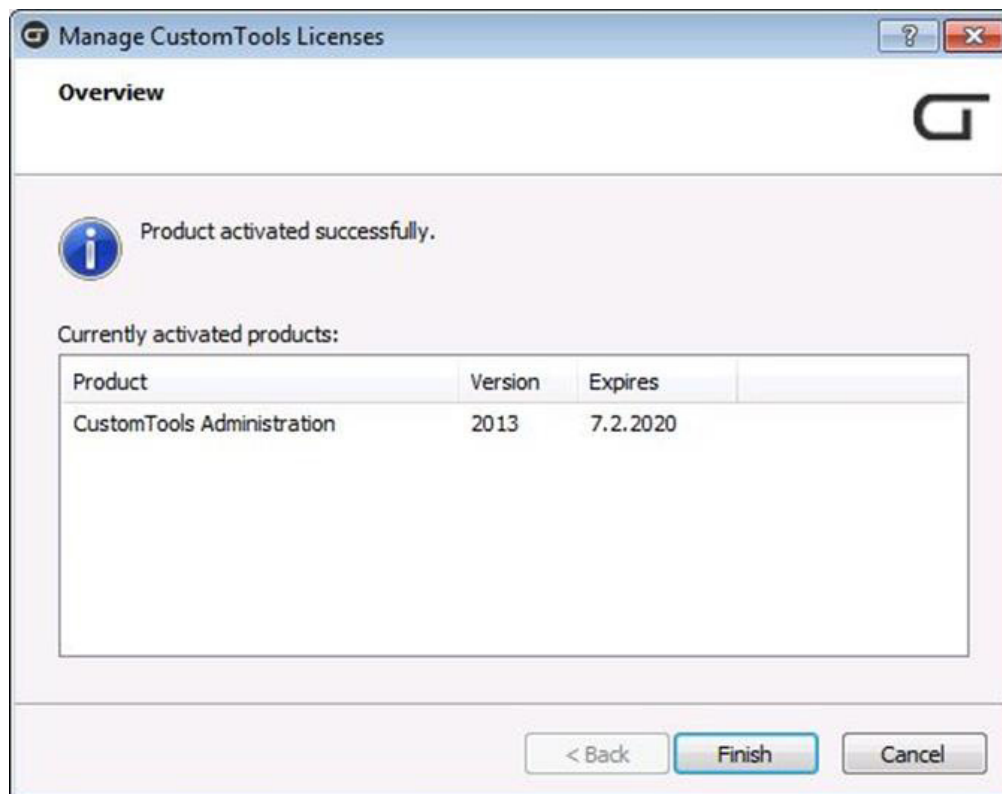


In the **SOLIDWORKS** add-in, the product selection looks like the following screenshot.



### License activation successful

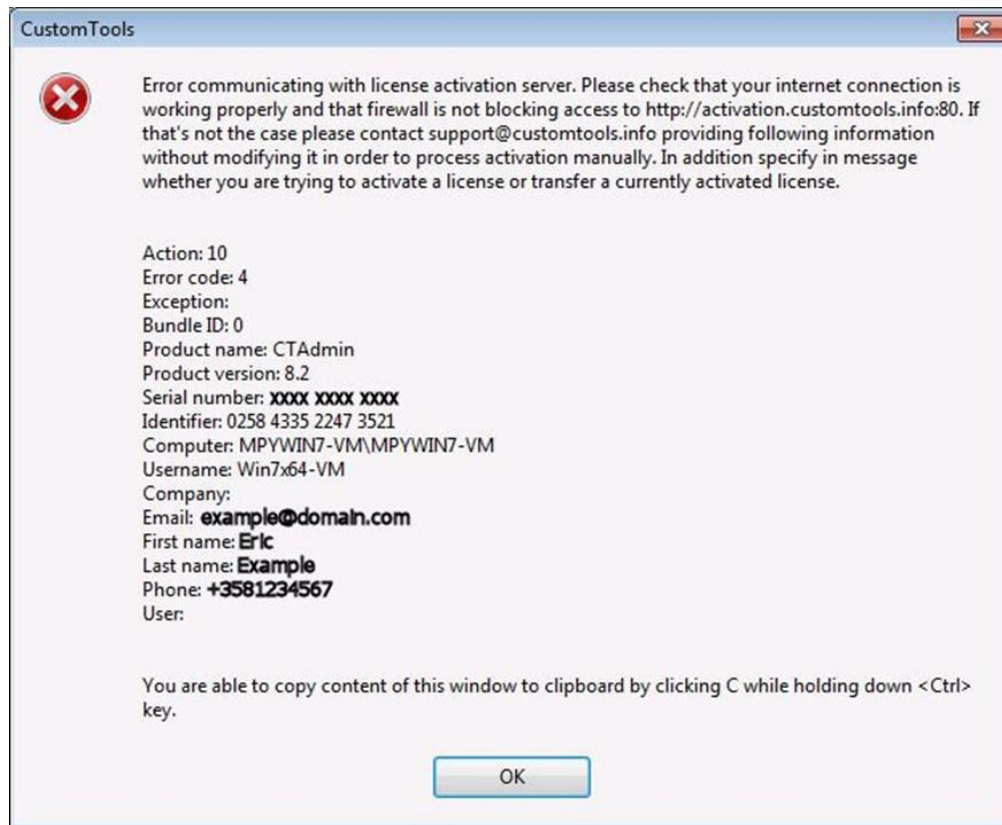
Once the selected CustomTools product has been successfully activated, the license activation summary page appears.





## E-Mail Activation

If you have a firewall rule, security policy or a proxy that prevents your workstation or license server to establish connection with the CustomTools license activation server, the following error message appears during the license activation process.



If you encounter an error message above, copy all contents of the error message to an e-mail message and send an e-mail to the Hawk Ridge Systems Support:

- **Support e-mail address:** [support@hawkridgesys.com](mailto:support@hawkridgesys.com)
- **Message subject could be:** CustomTools License Activation Request
- **Message content:** Contents of the activation error message



**TIP:** You can copy the error message contents by clicking in the header bar of the message box and then pressing **Ctrl+C**. To paste the content into an e-mail message, press **Ctrl+V**.

With e-mail activation Hawk Ridge Systems Support makes the license activation for you and sends you the necessary instructions in an e-mail.



# CustomTools Database

CustomTools requires a SQL Server database to be usable. For that reason the database creation is considered part of the CustomTools installation. CustomTools databases are created in the CustomTools Administration application.

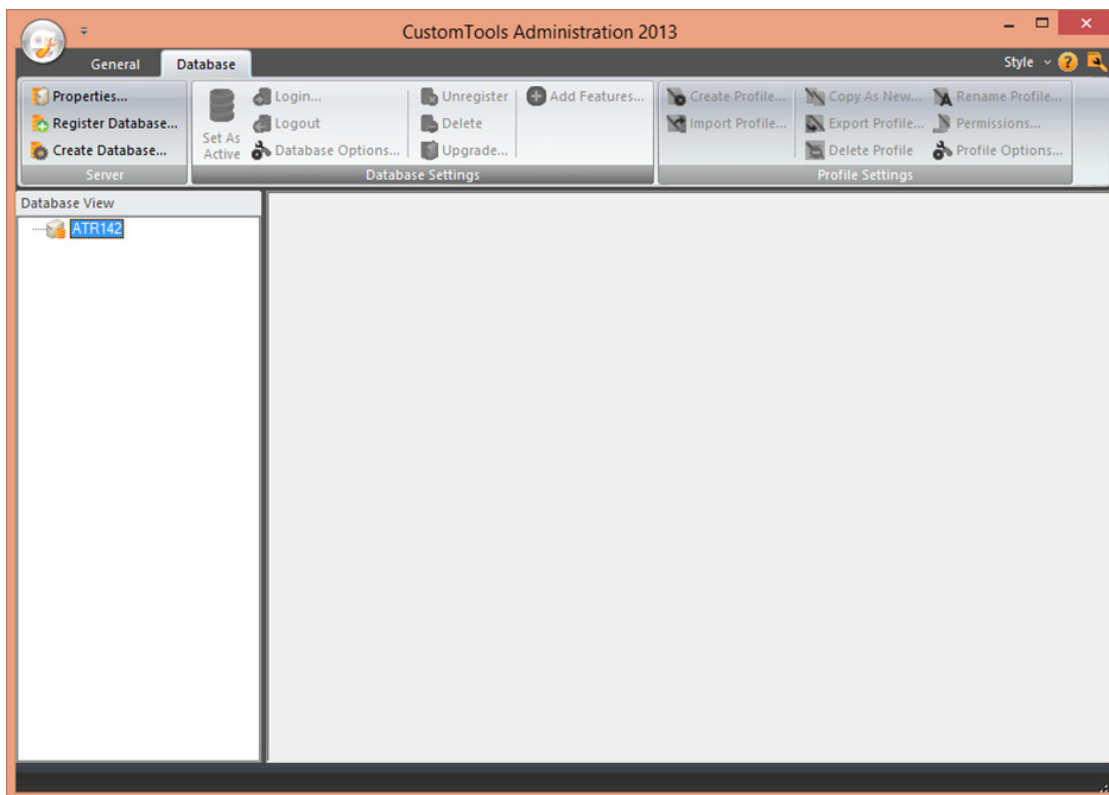


**NOTE:** If you install a trial version of CustomTools, you do not need to create the database after installation. The trial installation creates a database called CustomTools Demo automatically. You can skip this chapter.

## Creating a CustomTools Database

To create a CustomTools database run the CustomTools Administration. To find the Administration, click **Start, All Programs, CustomTools 2013, CustomTools Administration**.

The CustomTools Administration 2013 appears.



**NOTE:** The initial launch of any CustomTools product will prompt you to activate your CustomTools license. Please see the License Activation chapter for further instructions about license activation.

Once activated select the database server from the **Database View** and click the **Create Database** command located in the **Server** group of the ribbon.

The CustomTools Database Wizard appears.



## Database basic information

**Database Wizard: Step 1**

**Define the database name**

Database name:

Database name must be unique in SQL Server. Database name must comply with SQL Server database naming convention rules. Database name is displayed as a title in the login dialog box when logging in to the particular database.

Set the database as the active database

Create an example dictionary

Create attributes

Create a profile

Select the database language:

< Back   Next >   Cancel   Help

Setup the following basic information for the database as needed:

- **Database name** – Defines the name for the database used with CustomTools.
- **Set the database as the active database** – Select this option to set the database as the active one. CustomTools and SQL Server support multiple CustomTools databases. Only one can be active at any time. You can switch active databases later using the Administration tool.
- **Create an example dictionary** – Select this option to create an example dictionary used to create multilingual properties for the SOLIDWORKS documents.
- **Create attributes** – Select this option to create the database attributes to associate with the Custom Properties. Reference data of the SOLIDWORKS documents added by CustomTools is stored into the CustomTools database with help of the database attributes.  
**NOTE:** This option is automatically selected if the Create profile option is selected. If the Create profile option is selected, you cannot clear this selection.
- **Create profile** – Select this option to create an example profile in the CustomTools database. A profile includes several CustomTools options that affect the behavior and capabilities of the CustomTools features. This is a sample profile you can use to get familiar with CustomTools capabilities or as a



- **Select the database language** – Sets the default language of the CustomTools database. By default, the selected language is English (United States). You have the following optional languages available:
  - o Chinese (Simplified, PRC)
  - o Chinese (Traditional, Taiwan)
  - o Czech (Czech Republic)
  - o French (France)
  - o Hungarian (Hungary)

By default, all the options described above are selected to ease creating a fully functional CustomTools database that you can use to see how CustomTools works. The default settings (e.g. in an example profile) are fully customizable. You can modify all profile options afterwards.

## Profile setup

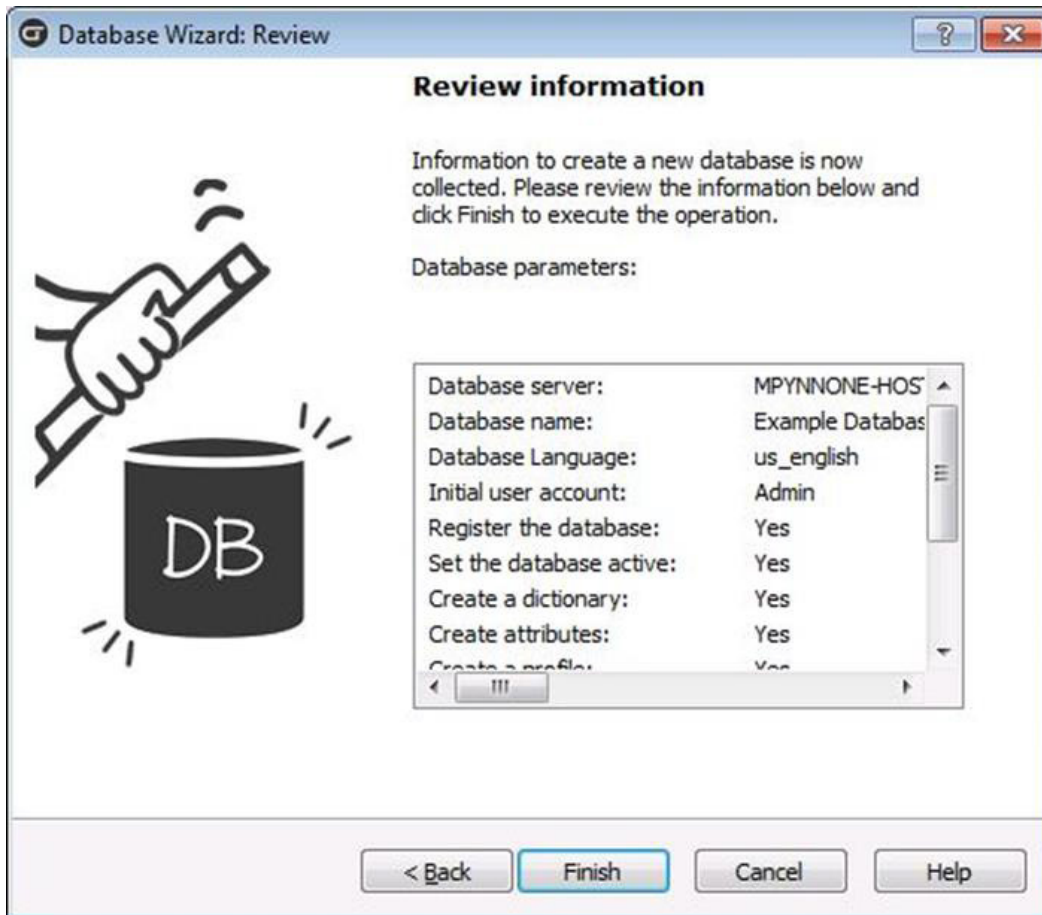
If you selected the Create profile option from the Database Wizard, you now need to define the following basic settings that apply to the CustomTools profile in this database:

- **Profile name** – A name of the profile created in the CustomTools database.
- **Profile type** – Choose the profile. Following templates are available:
  - o **Empty** – An empty profile with no profile options set by default. An empty profile must be fully defined by the user.
  - o **Machinery design** – A Machinery design profile template includes basic and common properties and settings needed for basic machinery design tasks.



## Review database information

The review page is used to check through the setup you defined to create a database. If you notice any mistakes, you can return to the previous steps by clicking the Back button. Otherwise, if all settings are correct, click Finish to create a database based on these settings.



**NOTE:** You must have permission on the SQL Server allowing you to create new databases.

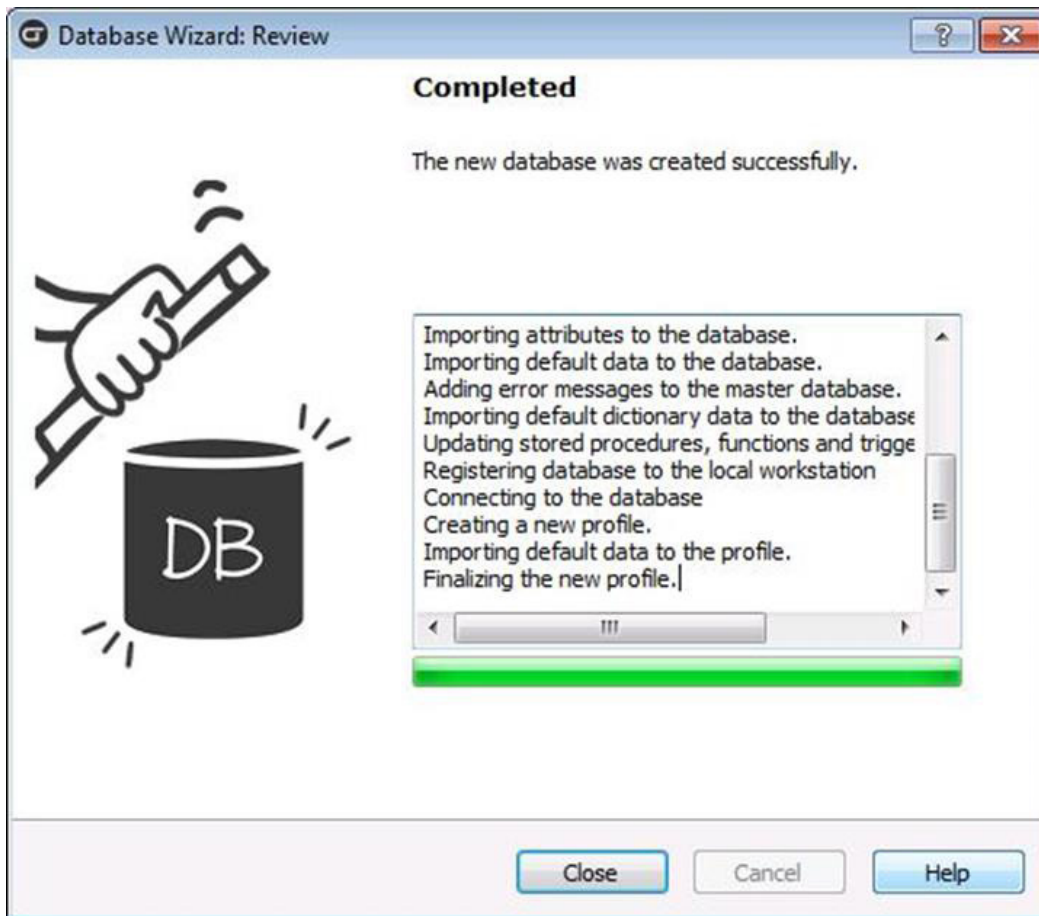


**TIP:** Use the SQL Server System Administrator (sa) account to create a database. The System Administrator's password was defined during the CustomTools installation if you selected the database option.



## Database creation finished

Once you successfully created a database for CustomTools, the Review Database Information page's name turns to Completed and a label appears detailing the successful steps.



Once complete, click **Close** to exit the **Database Wizard** and return to the CustomTools Administration.

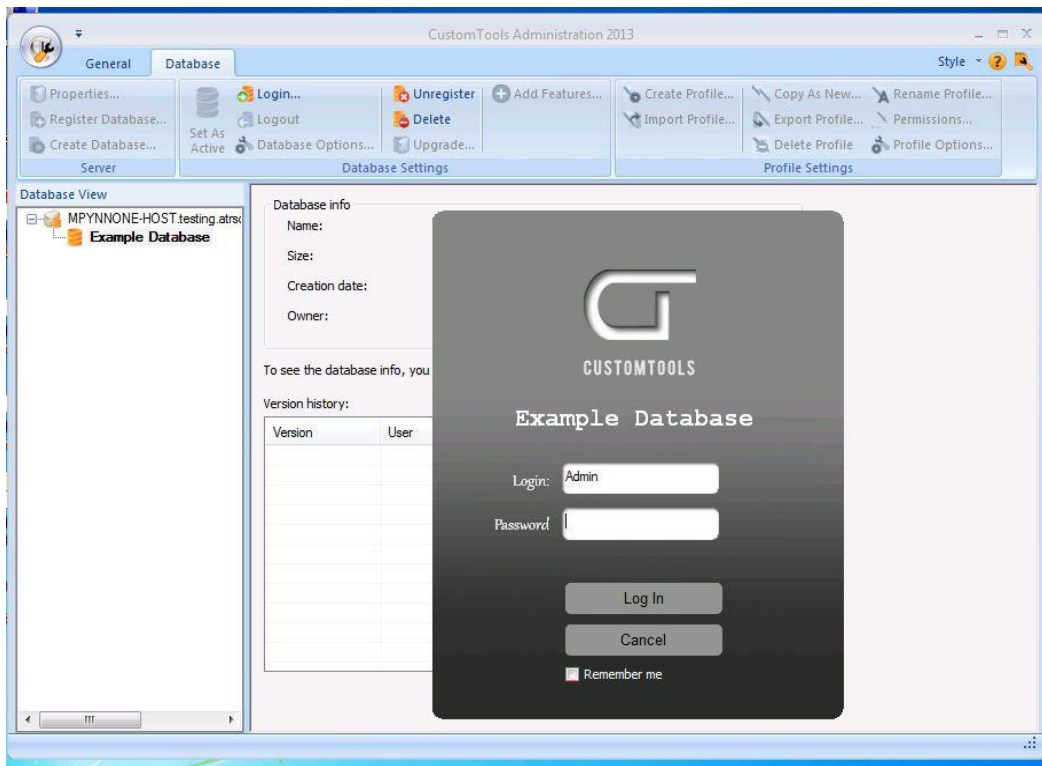
CustomTools database creation adds a database user called Admin and a couple of example users into the database. By default any users created during database creation have no passwords.

# Installation Completed

Once you have created a database and profile your CustomTools environment is ready to use. If you performed a trial installation just activate the trial license and the environment is then ready to use.

## Login to Database

Once you complete the environment setup, you can login to the CustomTools database as shown in the following screenshot.



The **Admin** user has no password by default. Ensure that Admin is typed in the Login box and click **Log In** to login to the CustomTools database.



## External Links

The following list includes the external links used in this document:

CustomTools Customer Portal

[http://customtools.info/CustomerCenter/kirjaudu\\_e.asp](http://customtools.info/CustomerCenter/kirjaudu_e.asp)

SOLIDWORKS system requirements

<http://www.SOLIDWORKS.com/sw/support/SystemRequirements.html>

SSE2, Streaming SIMD Extensions 2

<http://en.wikipedia.org/wiki/SSE2>

Adding roles and features to the Windows Server

<http://technet.microsoft.com/en-us/library/cc732263.aspx>

Microsoft SQL Server password policy

<http://technet.microsoft.com/en-us/library/ms161959.aspx>

Download Microsoft SQL Server 2008 R2 Management Studio Express

<http://www.microsoft.com/en-us/download/details.aspx?id=30438>

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