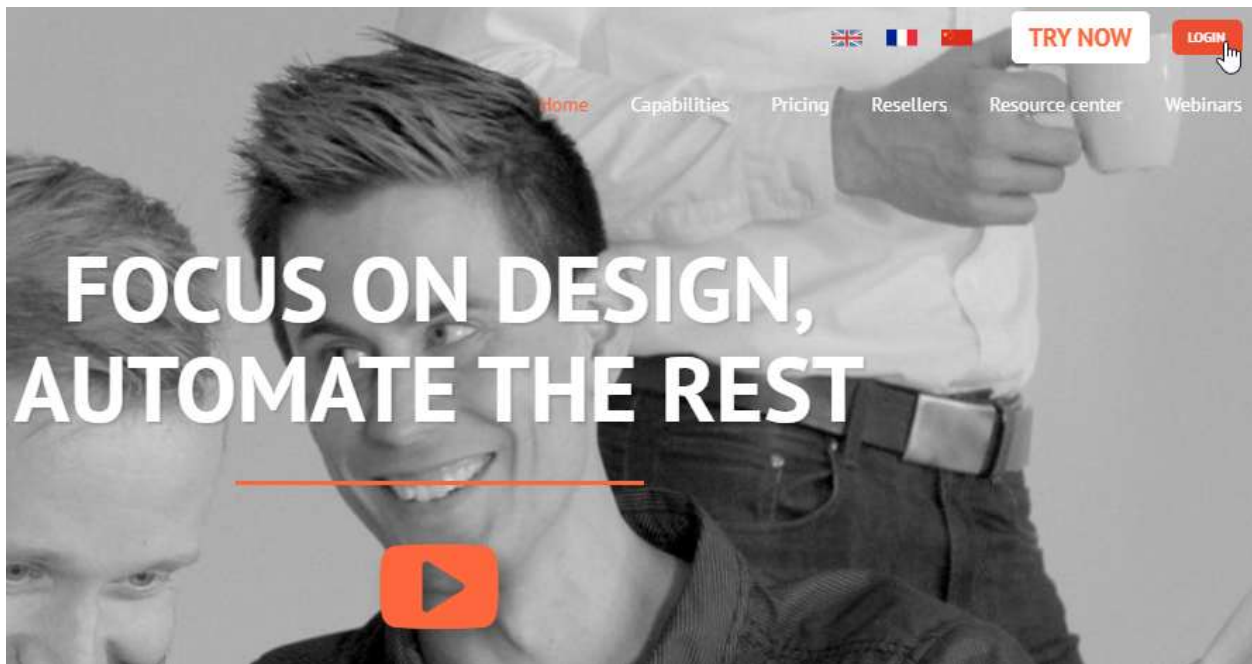


Upgrading CUSTOMTOOLS

The following guide was written while upgrading to CUSTOMTOOLS 2020 SP0 or later.

1. Download the installer at <https://customtools.info>
 - a. Select the LOGIN button in the upper right corner of the page.



- b. Sign in with your email address. If you have never signed in before use the "Forgot password" link to set one. If a user account with your email address does not exist contact Hawk Ridge Systems Support to create one for you.



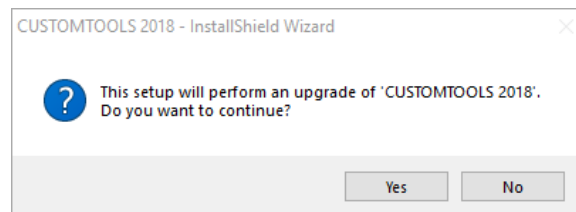
- c. Once logged in click on the Downloads link to see the list of installers and download the appropriate one. NOTE: The CUSTOMTOOLS service sack version

does not need to match your SOLIDWORKS service pack, and CUSTOMTOOLS major versions are typically compatible with 2 previous major versions.

This installer will be used for all server and client upgrades, as well as new client installations.

NOTE: If you are upgrading from a network version of CUSTOMTOOLS prior to 2018 skip step 2 and use step 3 instead.

2. Upgrade the License Server. *(Only applies to Networked clients when upgrading major releases, like 2017 to 2018. This is not necessary when upgrading between service packs, unless there is a specific bug in the network license manager being fixed by the upgrade.)*
 - a. Copy the installer to the server containing the CUSTOMTOOLS Network License Manager.
 - b. Run the installer to begin the installation wizard.
 - c. When notified of the upgrade, press Yes.

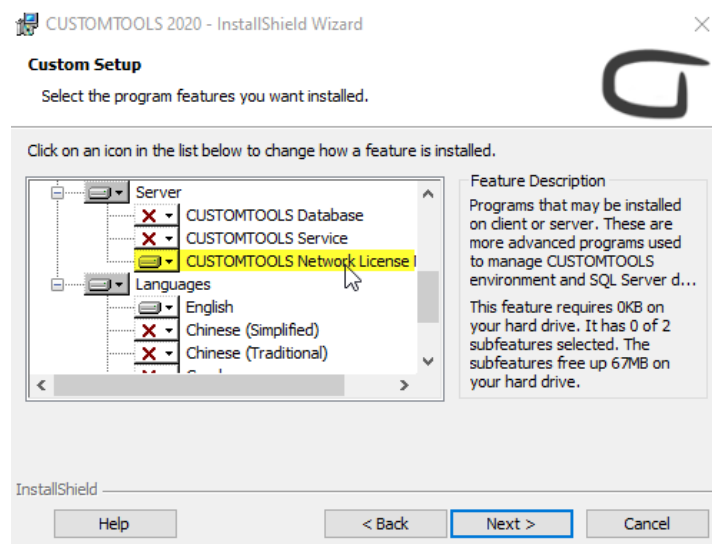


- d. Press Next and OK until you get to the Installation Completed window.
- e. Clear any "Show me" options you don't want to see and press Finish.



- f. Open the CUSTOMTOOLS Network License Manager.
- g. Activate your license to enable the 2018 version.
- h. Close the CUSTOMTOOLS Network License Manager.

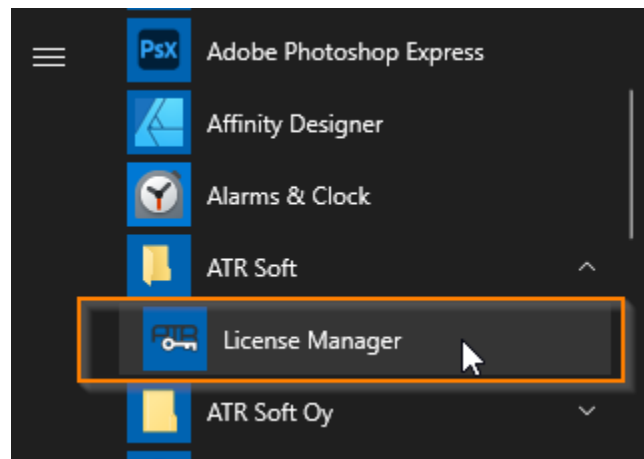
3. Upgrading a network license from a version older than 2018
 - a. Transfer the license from the current license server
 - i. Open the CUSTOMTOOLS License Manager
 - ii. Select "Manage Licenses"
 - iii. Select "Transfer License"
 - iv. Close the application when complete.
 - b. Uninstall the CUSTOMTOOLS License Manager.
 - c. Install the NEW ATR License Manager
 - i. Copy the CUSTOMTOOLS installer to the server hosting the CUSTOMTOOLS Network License Manager.
 - ii. Run the installer to begin the installation wizard.
 - iii. Select the "Custom" installation option.
 - iv. Select only the CUSTOMTOOLS License Manager from the component list if this server is only managing the licenses.



- v. Press Next and OK until you get to the Installation Completed window.
- vi. Clear any "Show me" options you don't want to see and press Finish.

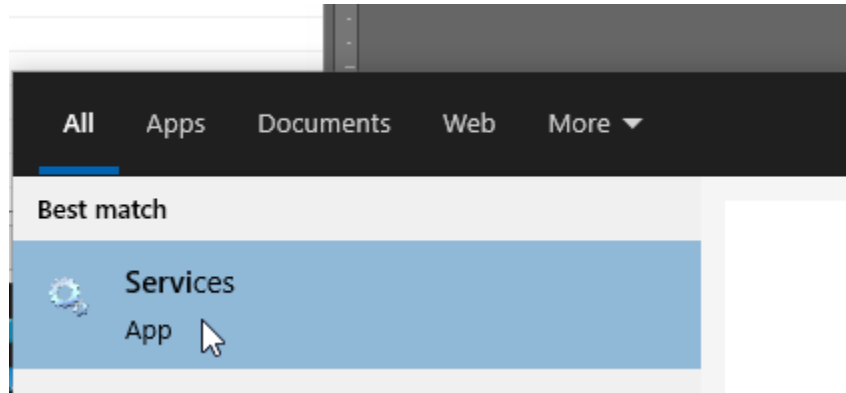


vii. Open the ATR License Manager.

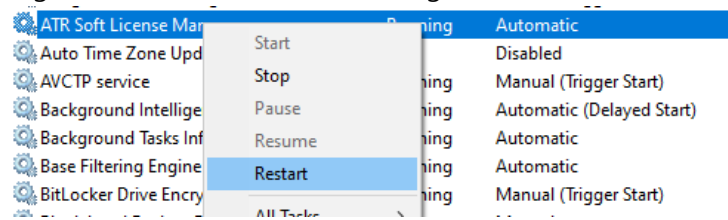


- viii. Select the "Manage Licenses" button.
- ix. Enter the Serial Number (include spaces: 0000 0000 0000)
- x. Enter a valid email address
- xi. Optionally enter your name and phone number.
- xii. Select the "Activate license" option.
- xiii. Select Next until it is finished.
- xiv. Close the License Manager.

- xv. Open the Windows Services app.



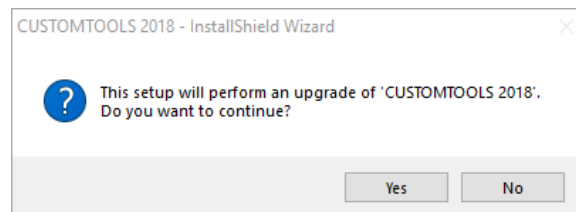
- xvi. Right-click the ATR License Manager service and select Restart.



- xvii. Close Services.

4. Upgrade the Server.

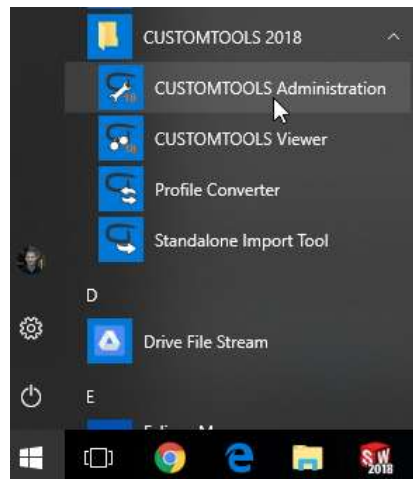
- a. Copy the installer to the server containing SQL Express. *(NOTE: If this is the same server as the CT Network License Manager skip ahead to step 4.f.)*
- b. Run the installer to begin the installation wizard.
- c. When notified of the upgrade, press Yes.



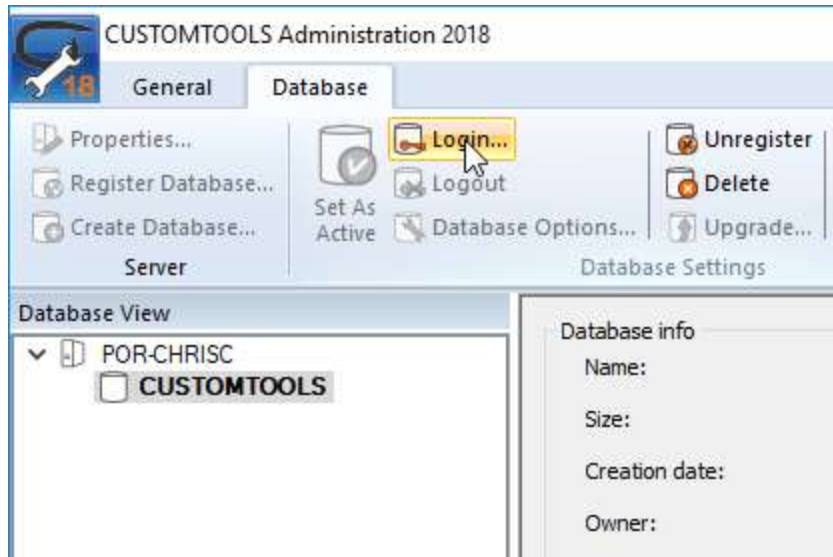
- d. Press Next and OK until you get to the Installation Completed window.



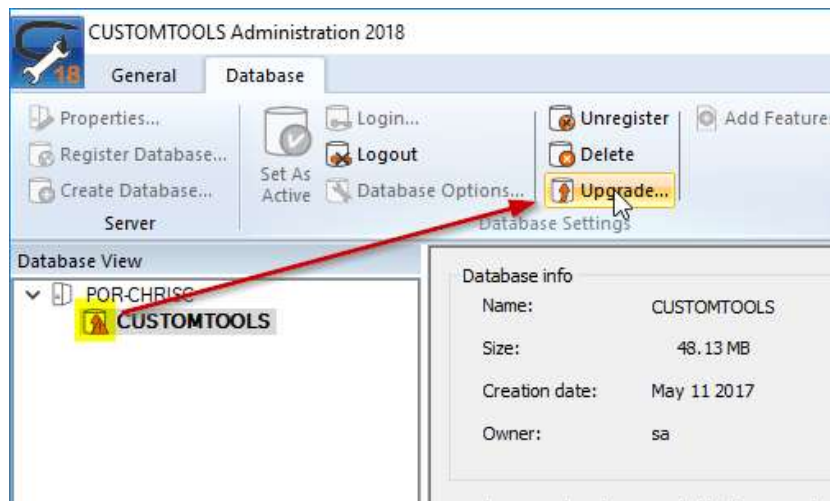
- e. Clear any "Show me" options you don't want to see and press Finish.
- f. Open the CUSTOMTOOLS Administration client.



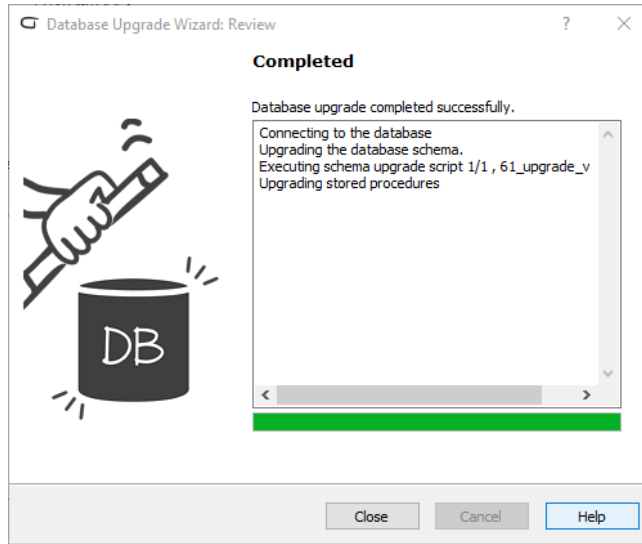
- g. Activate your 2020 license if prompted. (Standalone licenses)
- h. Select your Database and press "Login..."



- i. If you see a warning symbol next to your database press "Upgrade..."

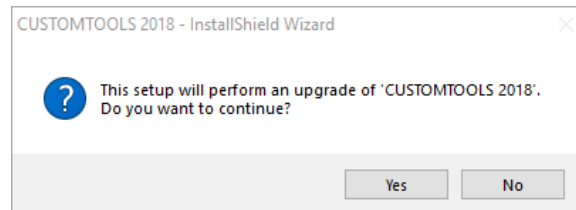


- j. Follow the wizard, accepting the defaults until you hit "Finish".
- k. Press the Close button once the Completed window appears.



- I. Close the CUSTOMTOOLS Administration client.

5. Update the CUSTOMTOOLS for SOLIDWORKS add-in client.
 - a. Copy the installer to SOLIDWORKS client PC.
 - b. Run the installer to begin the installation wizard.
 - c. When notified of the upgrade, press Yes.



- d. Press Next and OK until you get to the Installation Completed window.
- e. Clear any "Show me" options you don't want to see and press Finish.



- f. Open SOLIDWORKS and log into CUSTOMTOOLS if prompted. *(If no CUSTOMTOOLS login or menu bars are present after SOLIDWORKS opens, check the Add-ins list and make sure CUSTOMTOOLS for SOLIDWORKS is enabled.)*
- g. Activate the license if prompted. *(Network licenses should not prompt for activation)*
- h. If the CUSTOMTOOLS toolbars appear, you have successfully upgraded the client.
- i. Repeat for any remaining SOLIDWORKS users.