

Understanding Toolbox

Sal Lama February - 2009

Caution!

Before following the steps outlined in this tutorial, make sure you are working with a <u>copy</u> of your company's Toolbox. Only after you have completed the tutorial, are comfortable with the steps it describes, and have planned the customizations you want to make, should you proceed with making changes to your company's Toolbox.

To make a copy:

- 1) Open Windows Explorer
- 2) Locate your Toolbox folder (typically named "SolidWorks Data")
- 3) Copy that folder and all of its contents to a new location
- 4) Start SolidWorks and Open the **Tools Options** dialog
- 5) Select Hole Wizard/Toolbox and browse to the folder that was created during the copy operation
- 6) Close the Tools Options dialog

SolidWorks is now pointed at the copied Toolbox and it is now safe to proceed with this tutorial.

For more information about setting up Toolbox, refer to the PDF titled "Toolbox Setup".

Important words from the author to the reader...

This tutorial was written as a guide to accompany the hands-on presentation I gave at SolidWorks World. It was written such that it could be a self contained document that exposes users to the possibilities available in Toolbox. What it doesn't contain, however, are the explanations I would provide before attendees would try each exercise. Because that data is missing, you may find that after completing this tutorial you are comfortable with "How" to do things in Toolbox, but lack the understanding of "Why" you might do certain things. If that is the case, please post a thread to the Toolbox discussion forum and I (as well as other members of the community) will try my best to answer those questions.

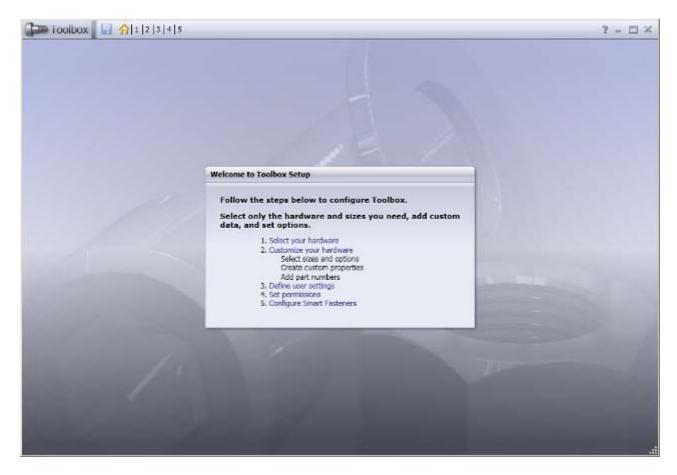
Exercise 1 – Customizing Content

- 1) Select **File**, **New...** choose any assembly template and click a. Cancel the "Begin Assembly" PropertyManager (if it appears)
- 2) Expand the Design Library by clicking on its tab in the Task Pane
- 3) Anchor it in place by pressing the pushpin

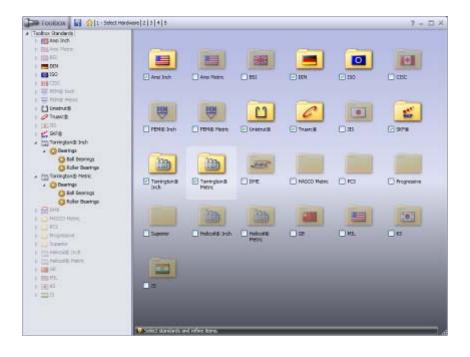
 (3) Press the pushpin to anchor the Task Pane

 (2) Click the Design Library tab to expand the Task Pane

 Design Library
 Toolbox
 3 Design Library
 Toolbox
 S SolidWorks Content
- 4) Select the Toolbox node in the upper portion of the Task Pane, then click "Add in now"
- 5) Select **Toolbox Configure...** to open the Toolbox Setup Utility



- 6) Select page 1 and disable all the standards except the following by clearing the checkmark to the left of their name:
 - a. ANSI Inch
 - b. **DIN**
 - c. ISO
 - d. SKF
 - e. Both Torrington Standards
 - f. Truarc
 - g. Unistrut



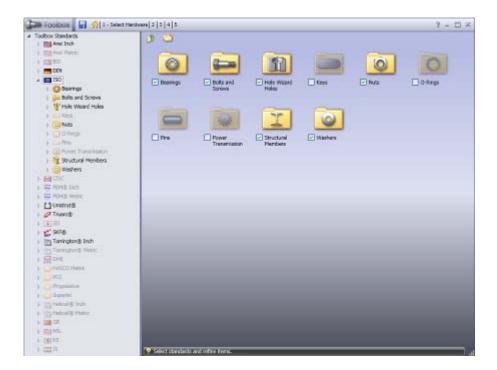
7) Click the **Save** button in the Toolbox Setup Utility and observe the updated Toolbox node in the Design Library



8) Select the **ISO** standard in the upper half of the Task Pane and observe the number of categories available in the lower half of the Task Pane



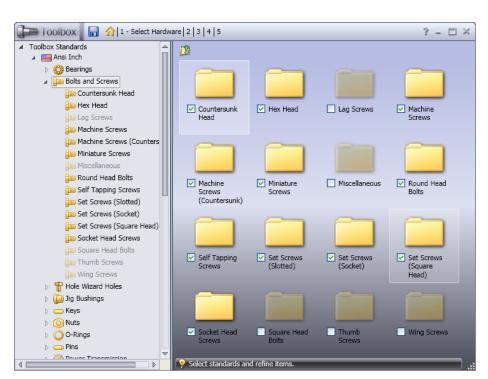
- 9) Expand the **ISO** standard and disable the following categories:
 - a. Pins
 - b. Power Transmission
 - c. Keys
 - d. O-rings



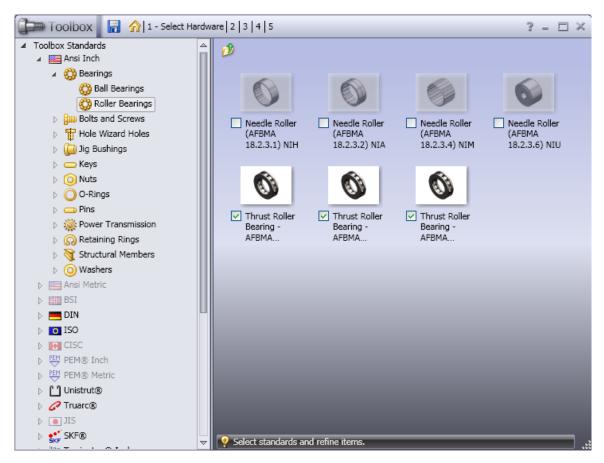
10) **Save** the Toolbox data and observe the updated list of categories in the Task Pane



- 11) Select the **ANSI Inch Bolts and Screws** category in the upper half of the Task Pane and observe the number of types available in the lower half of the Task Pane
- 12) Expand the **ANSI Inch Bolts** and **Screws** category and disable the following types:
 - a. Lag Screws
 - b. Miscellaneous
 - c. Square Head Bolts
 - d. Thumb Screws
 - e. Wing Screws



- 13) Save the Toolbox data and observe the updated list of types in the lower half of the Task Pane
- 14) Select the **ANSI Inch Bearings Roller Bearings** type in the Task Pane and observe the number of items available in the lower half of the Task Pane.
- 15) Expand the **ANSI Inch Bearings Roller Bearings** type and disable all Needle Roller Bearings (4 total)



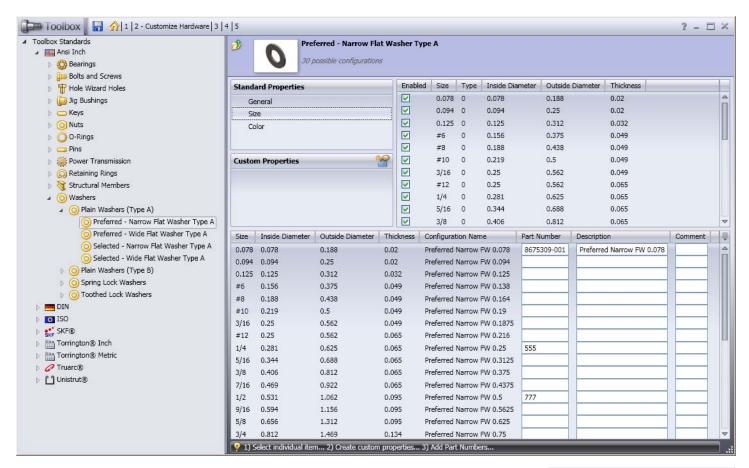
16) **Save** the Toolbox data and observe the updated list of items in the lower half of the Task Pane



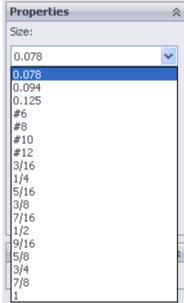
- 17) Select Page 2 of the Toolbox Setup Utility
- 18) Navigate to the ANSI Inch Washers Plain Washers (Type A) Preferred Narrow item
- 19) Under Standard Properties select "Size"
- 20) Disable all sizes greater than 1" by clicking the checkmarks in front of the appropriate sizes

NOTE: To quickly select a range of sizes use Shift selection.

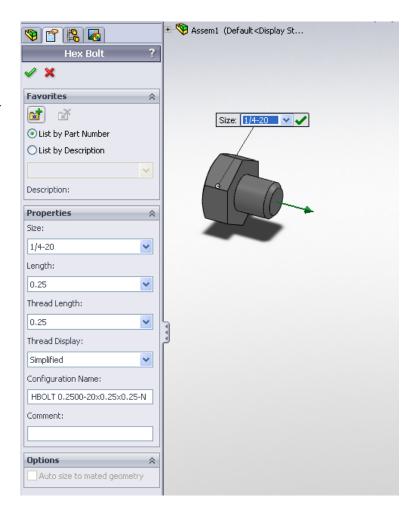
For example, select the checkbox for 1-1/8" then hold down SHIFT and select the checkbox for 3"



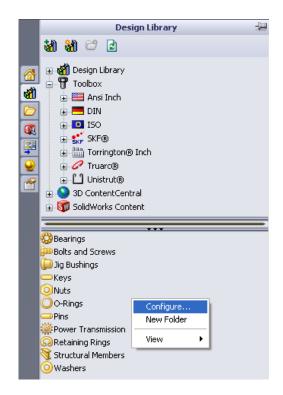
- 21) **Save** and close the Toolbox Setup Utility and drag the **ANSI Inch Washers Plain Washers** (**Type A**) **Preferred Narrow** from the Task Pane into the assembly.
- 22) Click the "Size" drop down in the Property Manager and notice that no sizes greater than 1" are available
- 23) Click in the Property Manager to cancel inserting the washer



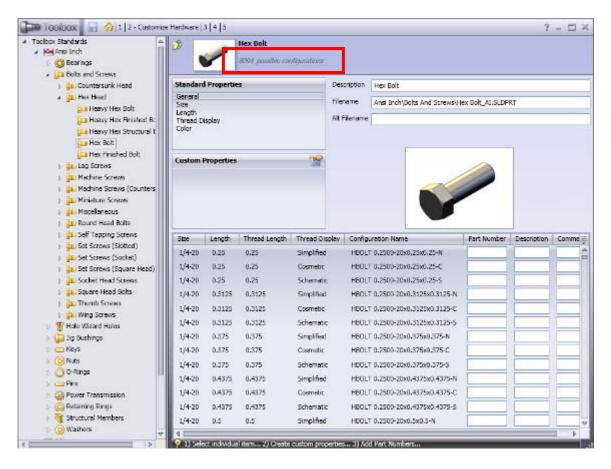
- 24) Drag the **ANSI Inch Bolts and Screws – Hex Head Hex Bolt** from the Task Pane into the assembly.
- 25) Select the **Size, Length** and **Thread Display** pull downs in the Property Manager to observe the various options available
- 26) Click in the Property Manager to cancel inserting the bolt



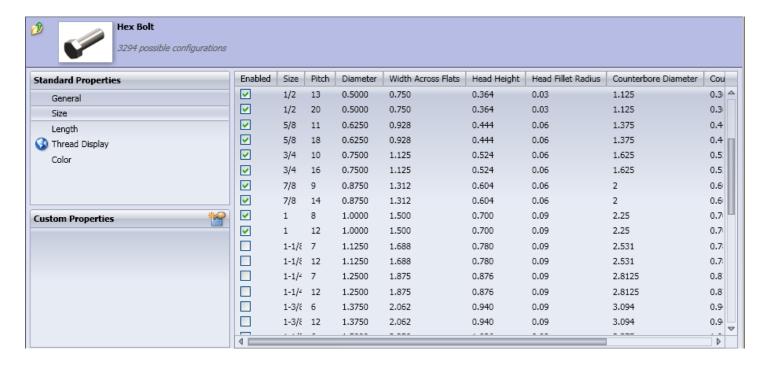
27) Right-click in the lower half of the Task Pane and choose **Configure...** from the shortcut menu to open the Toolbox Setup Utility again



- 28) Select the "Customize Hardware" page, then select the **ANSI Inch Bolts and Screws Hex Head Hex Bolt** item
- 29) Observe that there are over **8000** possible configurations!

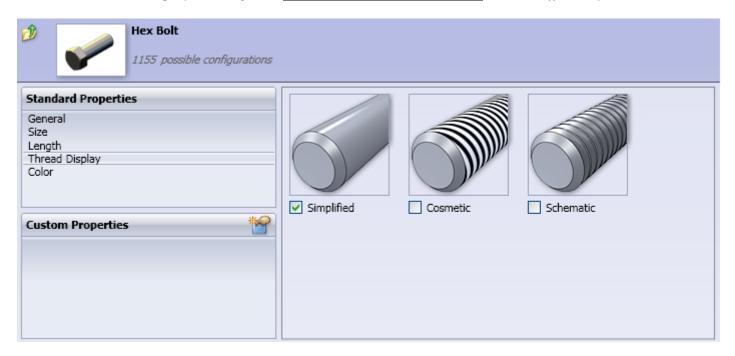


- 30) Activate the "Size" page and disable everything larger than 1"
- 31) Observe the change in the total number of configurations just over **3000** possibilities now!



32) Activate the "Thread Display" page and disable all types except "Simplified"

NOTE: "Thread Display" settings are "global" across each standard and will affect any threaded item



- 33) Check the number of possible configurations again only approximately **1000** possibilities now!
- 34) Save your settings and then close the Toolbox Setup Utility
- 35) Drag the **ANSI Inch Bolts and Screws Hex Head Hex Bolt** from the Task Pane into the assembly
- 36) Select the **Size**, **Length** and **Thread Display** pull downs in the Property Manager and observe the effect of your settings.
- 37) Click in the Property Manager to cancel inserting the bolt



Exercise 2 – Customizing Properties

1) Open the Toolbox Setup Utility and select Page 2 – Customize Hardware



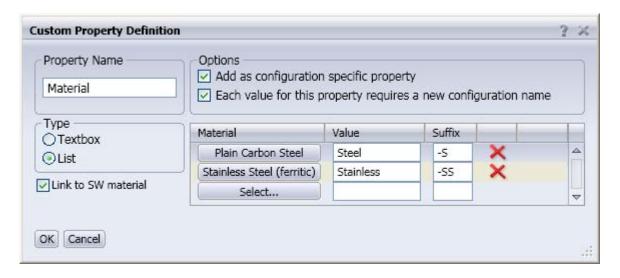
- 2) Select the "Add new Custom Property" button
- 3) In the Custom Property Definition dialog, type "Material" in the **Property Name** field and set the **Type** to "List", then enable these options:
 - a. "Add as configuration specific property"
 - b. "Each value for this property requires a new configuration name"
- 4) Fill out the **Choice List Definition** table to match the image below



5) Click **OK** to complete the creation of the custom property – it will now appear in the Custom Properties list



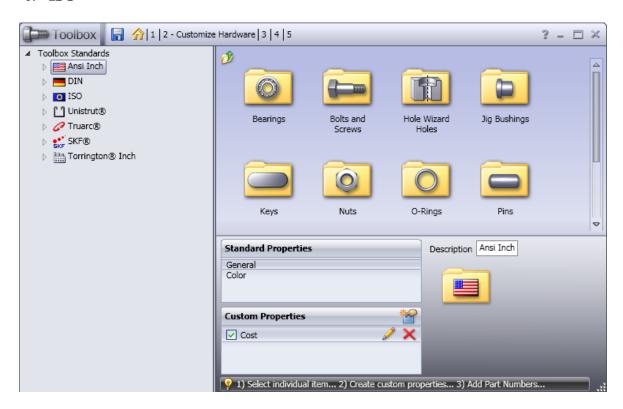
- 6) Select **ISO** from the tree on the left, then check the box next to "Material" to enable the property for this standard
- 7) Look at the "All configurations" table for any item in the **ISO** standard and notice that there is now two rows for each size one for "Steel" and one for "Stainless"
- 8) Click the "Modify Custom Property" button 🥒
- 9) Enable the "Link to SW Material" option and select the specific materials shown below



- 10) Click **OK** to complete editing the property then **Save** your changes.
- 11) Drag any item from the **ISO** standard into the assembly and change the "Material" selection. Notice that the visual qualities of the model change as you select Steel vs. Stainless Steel.
- 12) Click in the Property Manager to cancel inserting the item.
- 13) In the Toolbox Setup Utility, select the "Add new Custom Property" button and type "Cost" in the **Property Name** field
- 14) Set the **Type** to "Textbox", then type "Not Defined" in the **Overall default value** field
 - a. Make sure the options are checked to match those below

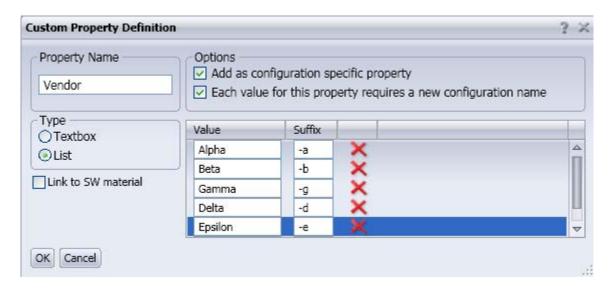


- 15) Click **OK** to complete the creation of the custom property
- 16) Apply this property to the following standards by selecting the standard in the tree on the left then checking the box for "Cost" in the Custom Properties list
 - a. ANSI Inch
 - b. **DIN**
 - c. ISO

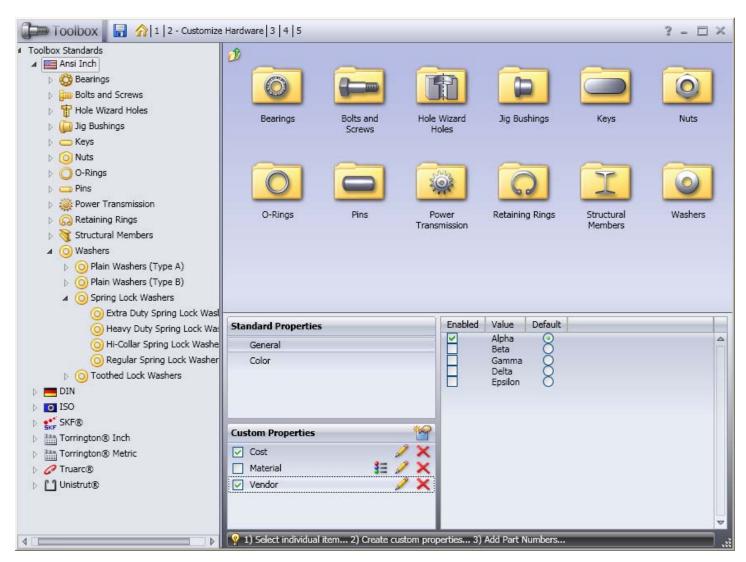


- 17) Create a third property with these characteristics:
 - a. **Property Name** = "Vendor"
 - b. **Type** = "List"
- 18) Enable these options:
 - a. "Add as configuration specific property"
 - b. "Each value for this property requires a new configuration name"

19) Fill out the Choice List Definition table to match the image below



20) Apply the "Vendor" property to ANSI Inch and disable the Beta, Gamma, Delta and Epsilon items



- 21) Apply the "Vendor" property to **DIN**, disable the Delta and Epsilon items and set Beta to be the default
- 22) Apply the "Vendor" property to ISO, disable the Alpha and Beta items and set Delta to be the default

- 23) Save and close the Toolbox Setup Utility
- 24) Drag the **ANSI Inch Washers Plain Washers (Type B) Wide Flat Washer** into the assembly

Notice that Alpha is the default vendor and only Alpha is available as an option

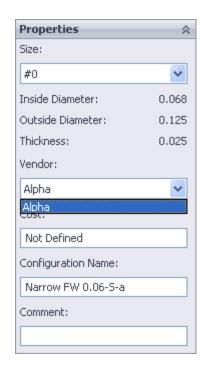
- 25) Click in the Property Manager to cancel inserting the washer
- 26) Drag the **DIN Retaining Rings External Circlip normal DIN 471** into the assembly

Notice that Beta is the default vendor and only Alpha, Beta and Gamma are available options

- 27) Click in the Property Manager to cancel inserting the circlip
- 28) Drag the **ISO Structural Members Steel Circular Tube** into the assembly

Notice that Delta is the default vendor and only Delta, Gamma and Epsilon are available options

29) Click in the Property Manager to cancel inserting the tube







STOP You have completed Exercise 2 !!!

Exercise 3 – Part Numbers

- 1) Drag ANSI Inch Washers Spring Lock Washers Regular Spring Lock Washer into the assembly
- 2) Click the Add/Update button in the Favorites group box
- 3) Enter "8675309-001" as the Part number and "# 2 Regular Spring Lock Washer" as the Description



4) Click "OK"

Notice that the Part Number and Description are listed in the Favorites group box



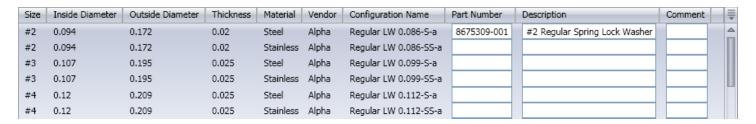
- 5) Change the "Size" to 1/4
 Notice that the Part Number pull down shows no number (since one is not yet assigned)
- 6) Select the "List by Description" option in the Favorites group box
- 7) Pick the **"#2 Regular Spring Lock Washer"** from the pull down list *Notice that the Properties group box is updated with the appropriate settings*



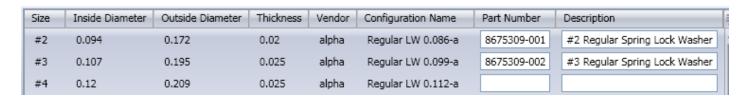
8) Click OK in the Property Manager to insert the washer into the assembly

- 9) Click Cancel in the Insert Components PropertyManager
- 10) Open the Toolbox Setup Utility
- 11) On page 2 Customize Hardware- navigate to ANSI Inch Washers Spring Lock Washers Regular Spring Lock Washer

Notice that the "All Configurations" table shows the Part Number and Description you just entered in the PropertyManager



12) Fill out the Part Number and Description for the LW 0.099-a configuration as shown below



- 13) Save your settings
- 14) Drag the **Regular Spring Lock Washer** into the assembly again
- 15) Select the #3 Regular Spring Lock Washer from the Favorites pull down then click OK 🗸



- 16) Click Cancel in the Insert Components Property Manager
- 17) Go back to the "All configurations" tab of the **ANSI Inch Washers Spring Lock Washers Regular Spring Lock Washer** again
- 18) Using the button in the upper right corner of the table, select "Export data"
- 19) Save the Excel spreadsheet to the Desktop as AI_Regular Spring Lock Washer.xls
- 20) Start Excel and open the **RegSpringLW.xls** file

≡

Description

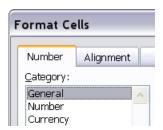
Import data... Export data...

Create configurations

- 21) Drag-select the two cells containing the Part Numbers you've already entered (cells **G5** and **G6**)
- 22) Drag the fill handle (the black square in the lower-right corner of a cell) down to the 1-1/2" size (cell G33)

	А	В	С	D	Е	F	G	Н	
1	Fastener Name	Regular Spring Lock Washer							
2	Fastener ID	LWS4_AI_WASHERS_PN							
3									
4	Size	Inside Diameter	Outside Diameter	Thickness	Vendor	Configuration Name			Comment
5	#2	0.094	0.172	0.02	Beta	LW 0.086-a	8675309-001	#2 Regular Spring Lock Washer	
6	#3	0.107	0.195	0.025	Beta	LW 0.099-a	8675309-002	#3 Regular Spring Lock Washer	
7	ши	0.40	0 200	ח חשב	D-1-	110/0 440 -		*	
JZ	11-7710	1.402	Z.J14	0.000	Deta	LVV 1.4070-a	1		
33	1-1/2	1.524	2.409	0.375	Beta	LW 1.5-a			
34								8675309-029	
35								0070307 027	

- 23) Select column H, then Click **Format Cells...** (or **Ctrl+1** on your keyboard)
- 24) Change the Category to "General"



25) Type the following into the cell beneath the #3 Regular Spring Lock Washer description (cell H7)

Be sure to use an equal sign at the beginning of the equation and a space between the quote and Regular

=CONCATENATE(A8, "Regular Spring Lock Washer")



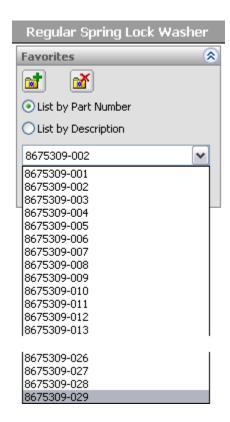
- 26) Press Enter and see that the Description reads #4 Regular Spring Lock Washer
- 27) Select cell **H7** again and drag the fill handle to cell **H33**, automatically filling out all descriptions

	Α	В	С	D	E	F	G	Н
1	Fastener Name	Regular Spring Lock Washer						
2	Fastener ID	LWS4_AI_WASHERS_PN						
3								
4	Size	Inside Diameter	Outside Diameter	Thickness	Vendor	Configuration Name	Part Number	Part Description
5	#2	0.094	0.172	0.02	Beta	LW 0.086-b	8675309-001	#2 Regular Spring Lock Washer
6	#3	0.107	0.195	0.025	Beta	LW 0.099-b	8675309-002	#3 Regular Spring Lock Washer
7	#4	0.12	0.209	0.025	Beta	LW 0.112-b	8675309-003	#4 Regular Spring Lock Washer
8	#5	0.133	0.236	0.031	Beta	LW 0.125-b		#5 Regular Spring Lock Washer
0	an an	0.4.40	0.05	0.004	D-1-	11070 400 5	0075000 005	Art manufacturation for the National
	טויטרום	I .JJJ	Z. 1Z4	U.J2U	шета	LVV 1.0 20-0	10070305-020	
31	1-3/8	1.399	2.21	0.344	Beta	LW 1.375-b	8675309-027	1-3/8 Regular Spring Lock Washer
32	1-7/16	1.462	2.314	0.359	Beta	LW 1.4375-b	8675309-028	1-7/16 Regular Spring Lock Washer
33	1-1/2	1.524	2.409	0.375	Beta	LW 1.5-b	8675309-029	1-1/2 Regular Spring Lock Washer

28) Save and close the Excel document

- 29) In the Toolbox Setup Utility select "Import data"
- 30) Select the **RegSpringLW.xls** file

- Description
 Import data...
 Export data...
 Create configurations
- 31) Press Open
 Notice that the Part Numbers and Descriptions are imported into the All Configurations table
- 32) Save the Toolbox data
- 33) Drag the Regular Spring Lock Washer into the assembly again
- 34) Click the pull down in the Favorites group box
- 35) Observe the Part Numbers and Descriptions you just entered
- 36) Click Cancel in the Property Manager

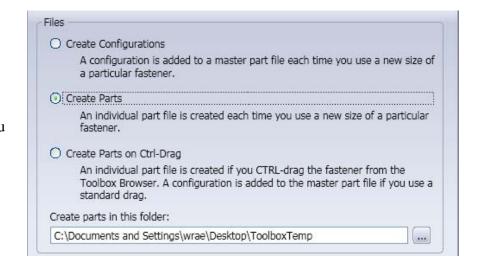




STOP You have completed Exercise 3 !!!

Exercise 4 – Settings

- 1) Minimize SolidWorks
- 2) Create a folder on your desktop named **ToolboxTemp**
- 3) Open the Toolbox Setup Utility
- 4) Select page 3 User Settings
- 5) Select the Create Parts option
- 6) Use the ellipsis to browse to the **ToolboxTemp** folder you just created Your path should look like this (with the exception of the username)

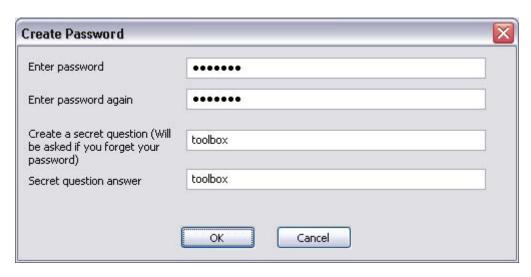


- 7) **Save** the Toolbox data
- 8) Drag the **Regular Spring Lock Washer** into the assembly again

 Notice that the text box towards the bottom of the Property Manager is now labeled **File Name**
- 9) Select the 1/4 Regular Spring Lock Washer from the Favorites pull down
- 10) Click OK vo to insert the washer into the assembly
- 11) Click Cancel in the Insert Components Property Manager
- 12) Open the **ToolboxTemp** folder and observe that a file named **LW 0.25-a.sldprt** was created.
- 13) Open the Toolbox Setup Utility and select page 4 Permissions
- 14) Click the Create/Change button in the User Access Control



15) Type the word "toolbox" in all four fields



- 16) Click **OK** and observe that the **User Access Control** options are now available
- 17) Set the options to match the following image



18) Save and close the Toolbox Setup Utility

19) Drag Regular Spring Lock Washer into the assembly again

Notice that the Add/Update and Delete buttons have been removed from the Favorites group box





Before

After

- 20) Click in the Property Manager to cancel inserting the washer
- 21) Open the Toolbox Setup Utility
- 22) Notice that most of the options are grayed out to show that they cannot be changed
- 23) Click "Please Login"



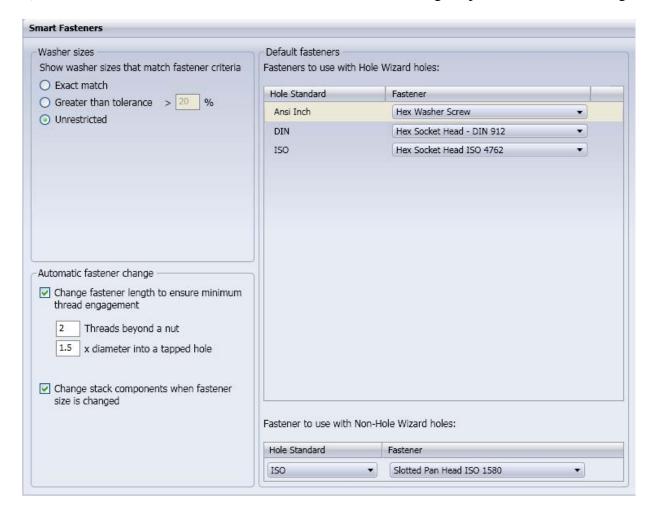
- 24) Enter "toolbox" and click OK
- 25) On page 4 Permissions uncheck the **Allow editing of Configuration/File Name** option
- 26) Save and close the Toolbox Setup Utility



STOP You have completed Exercise 4!!!

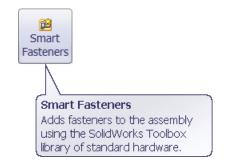
Exercise 5 – Smart Fasteners

- 1) Open the Toolbox Setup Utility
- 2) Open page 5 Smart Fasteners
- 3) Make sure the "Washer sizes" and "Automatic fastener change" options to match the image below



- 4) In the "Fasteners to use with Hole Wizard holes:" table:
 - Set the ANSI Inch "Type" to Machine Screws Hex Washer Head
- 5) In the "Fasteners to use with Non-Hole Wizard holes:" table:
 - Set the "Hole Standard" to ISO
 - Set the "Type" to Slotted Head Screws Pan (1580)
- 6) **Save** and close the Toolbox Setup Utility
- 7) Open the Smart Fasteners.SLDASM located in C:\SWW Hands On Toolbox\
- 8) Review the annotations and note that there are three different holes into which fasteners will be added
- 9) Click **View**, **All Annotations** to turn off the notes

10) Click **Insert, Smart Fasteners** or click the Smart Fasteners icon on the Assemble tab of the Command Manager

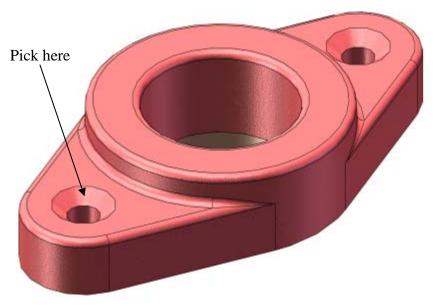


11) Click **Don't ask me again** then **OK** in dialog that appears informing about Lightweight components

12) Select the conical face of the countersink hole in the TensionerBase (the red component)

Notice that the Selection group box is populated with the name of the feature – in this case a hole drilled for a specific size and type of fastener

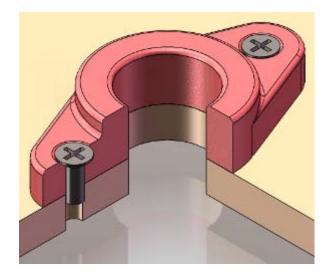




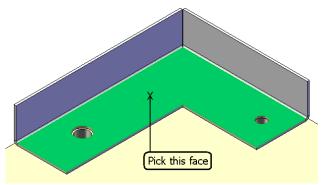
13) Press Add

14) Observe that, two Flat Head Machine Screws were inserted in one step, because both countersink holes were created with the same feature

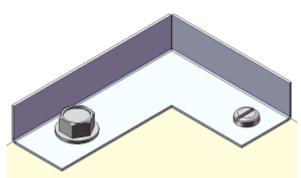
Note: cutaway view shown for clarity. If you wish to see your assembly in this manner, unsuppress the Cut-Extrude1 assembly feature.



- 15) Click OK in the Smart Fastener Property Manager
- 16) Select the face of the Sheetmetal part into which the holes are drilled



- 17) Launch the Smart Fasteners command again Notice that two fasteners were automatically inserted
- 18) Rotate the model so you are looking at the bottom of the two fasteners that were just inserted



19) In the "Results" group box, select the Slotted Pan Head ISO **1580** item



- 20) In the "Series Components" group box, click the "Add to Bottom Stack" combo box and select the following hardware:
 - Plain Washers Normal A (7089)
 - Hex Nuts Style 1 (4032)

Notice that the two components are added and the screw is lengthened

21) Click OK in the Smart Fastener Property Manager





STOP You have completed Exercise 5 !!!

Exercise 6 – Adding your own models

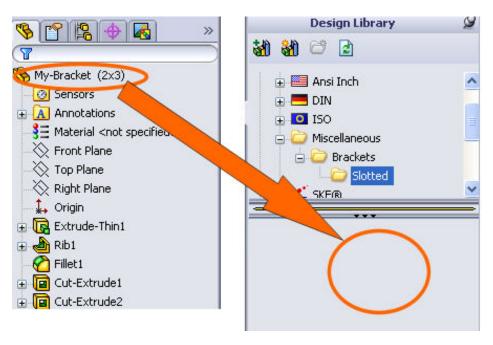
- 1) Open the **My-Bracket.SLDPRT** located in **C:\SWW Hands On Toolbox**Notice that it has existing configurations
- 2) Right-click on the Toolbox node in the Design Library and choose **New Folder** from the shortcut menu



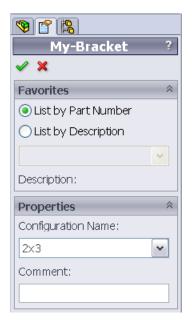
3) Name the folder Miscellaneous and repeat the process to create the two subfolders pictured below



4) Select the Slotted folder that you just created, then drag the part icon at the top of the Feature Manager into the lower half of the Task Pane – this will launch the **Add to Library** Property Manager



- 5) Click OK to close Add to Library Property Manager
- 6) Close the My-Bracket part
- 7) Drag the My-Bracket thumbnail from the Task Pane into the background of your assembly *Notice that a Toolbox-like Property manager appears*



- 8) Select various configurations from the pull down *Notice that the preview automatically updates*
- 9) Click OK voto close Property Manager

