



Agile Product Lifecycle Management

MCAD Connectors for Agile Engineering Collaboration Installation Guide

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Preface

Contacting Oracle Support Services

For Oracle Agile Engineering Collaboration support contact the Oracle Global Customer Support (GCS) via www.oracle.com/support or My Oracle Support via <https://support.oracle.com>.

Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

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Prerequisites

Prior to the installation of the CAD Connectors and the EC Web Dialogs on a local system, you must verify the following items:

- Database is operational and running.
- Agile PLM (see Introduction for supported versions) is installed and the server is accessible. (The prerequisites for the Java Runtime Environment are the same as for Agile PLM server.)

Important If you are not working with a member of Oracle Consulting Services, you are strongly encouraged to refer to Agile Product Lifecycle Management Documentation for installation procedures.

- Agile File Management Server is usable and accessible.
- **The Engineering Collaboration Web Services might need to be updated on your Agile PLM server to be compatible with this release of PLM MCAD. Please check the chapter “Updating the Engineering Collaboration Services on the Agile PLM server” for details.**
- A test environment is prepared.
- A CAD system is installed on the end-user’s workstation. In addition, the end user has been granted any necessary privileges to use the CAD system.
- Login name and password of the Agile PLM test user are known in Agile PLM.
- The test user can launch an Agile PLM client session.

Note that starting with release 3.0 of the Engineering Collaboration MCAD Connectors, only the Design data model is supported for storing CAD data in PLM. If you are currently using the DocuBOM data model for EC it is necessary to migrate the data accordingly. Please contact Oracle Consulting Services for assistance.

Validating the Engineering Collaboration Services on the Agile PLM Server

The Connectors communicate with the Agile PLM server through the Engineering Collaboration Web Services (EC Services). The required web services are provided by Oracle as part of the standard Agile PLM installation, but might require an update through a hotfix.

Please check the “Oracle Agile Product Lifecycle Management - MCAD Connector Quick Install Guide” on the Oracle Software Delivery Cloud (<http://edelivery.oracle.com/>) if a hotfix is needed for your version of Oracle Agile PLM and follow the installation instructions of the required PLM

hotfix.

Installing and Configuring Pro/ENGINEER Connector

This section describes setting up the connection between your Pro/ENGINEER CAD application and Agile Engineering Collaboration.

The main steps are:

- Extract files from Pro/ENGINEER Connector zip file.
- Install the Engineering Collaboration Web Components
- Edit some parameters in the configuration file.
- Edit some parameters in the mapping file.
- Create shortcut to new startup file.
- Create toolbar in Pro/E (optional).

The installation requires the following files:

 Main Pro/E CAD Connector installation package.

 Main Web Connector installation package.

Performing the installation steps described here will enable the Agile menu to appear within Pro/E. In order to have a completely functional integration, you must also:

- Perform the core Agile configuration, as described in the chapter *Agile PLM Server Class Administration* of the *MCAD Connectors for Agile Engineering Collaboration Administration Guide*.
- Configure desired Pro/E Connector parameters as described in the *Administration Guide*.

Extracting Files for Pro/ENGINEER Connector

Extract the Pro/E Connector installation file in new and empty folder location **<Installation Directory>**. When unzipping, make sure to retain the folder paths from the zip file. When the files are unzipped you should see a folder named **xacp**, which contains the connector installation.

Extract the Web Components installation file into the **xacp** folder in the **<Installation Directory>**. When unzipping, make sure to retain the directory structure contained within the zip file. If you are prompted for overwriting existing files during unzipping, always accept.

Now follow the common installation instructions in *Installing the Web Components* and run the Load Callback Installer if needed.

Setting Java Version

The Web Connector installation contains the necessary Java Runtime Environments (32 and 64 bit). If you are running Pro/ENGINEER 32 bit or 64 bit, you usually do not need to make any changes. The start script contains automated switch for 64 bit settings.

	Java Requirement	How to change
Pro/E Connector	Java 6 for 32 bit Java 6 for 64 bit (use special 64 bit JRE provided)	Edit the setting "AcpJava" in the file <Install Directory>\xacp\com\xAcp.cfg and set the JRE directory: ... # --- Java runtime directory ----- # optional settings # using %AcpRoot%\jre6 if not set # AcpJava=C:\Programme\Java\jre6 # ...

Optional you can change the settings for JRE, as shown in the table below.

Note If changing the JRE environment, make sure that the correct Pro/Engineer or Creo version is set.

Editing the Configuration File

Open the file <Install Directory>\xacp\com\xAcp.cfg in a text editor. Edit the values as described in the table below to match your system configuration.

Sample values	What this command specifies
AcpUserRoot=C:\AcpUser	Working directory for user data and files
CAX_WORKSPACE_ROOT=C:\AcpWork	Optional setting for workspace root. Using %AcpUserRoot%\wspaces if not set
AcpLang=english	ACP Menu and UI language
LANG=english	Optional setting for Pro/E language
AcpAgl=Agile9	Setting Agile version (Main release)
AcpCustomerIni=AcpCustomer9.ini	Define name of ini file for custom specific settings
AcpProEV=2007	Currently, installed version of Pro/E: <ul style="list-style-type: none">▫ “2012” designates Creo Parametric 2.0▫ “2011” designates Creo Parametric 1.0▫ “2010” designates Creo Elements/Pro 5.0 (WF5 M70)▫ “2009” designates Pro/Engineer Wildfire 5
AcpStartProE=C:\proe\bin\proe1.bat	Set to the path and file name of your Pro/Engineer start-up script; this file is usually located in the bin directory of the Pro/Engineer installation. However, if your company has a customized Pro/Engineer start-up script, please set this value accordingly.

Creating a Shortcut to the Startup File

In order to run Pro/Engineer with activated EC, it is necessary to execute the start-up script <Install Directory>\xacp\com\xacp_start.bat. To make this more convenient, you may want to create a

shortcut to this file on your Desktop and/or in your Quick Launch bar.

Verify that the EC is working by double-clicking on your start-up script (or the appropriate shortcut). You should see a menu labelled *Agile* in Pro/Engineer's or Creo's main menu bar respectively ribbon.

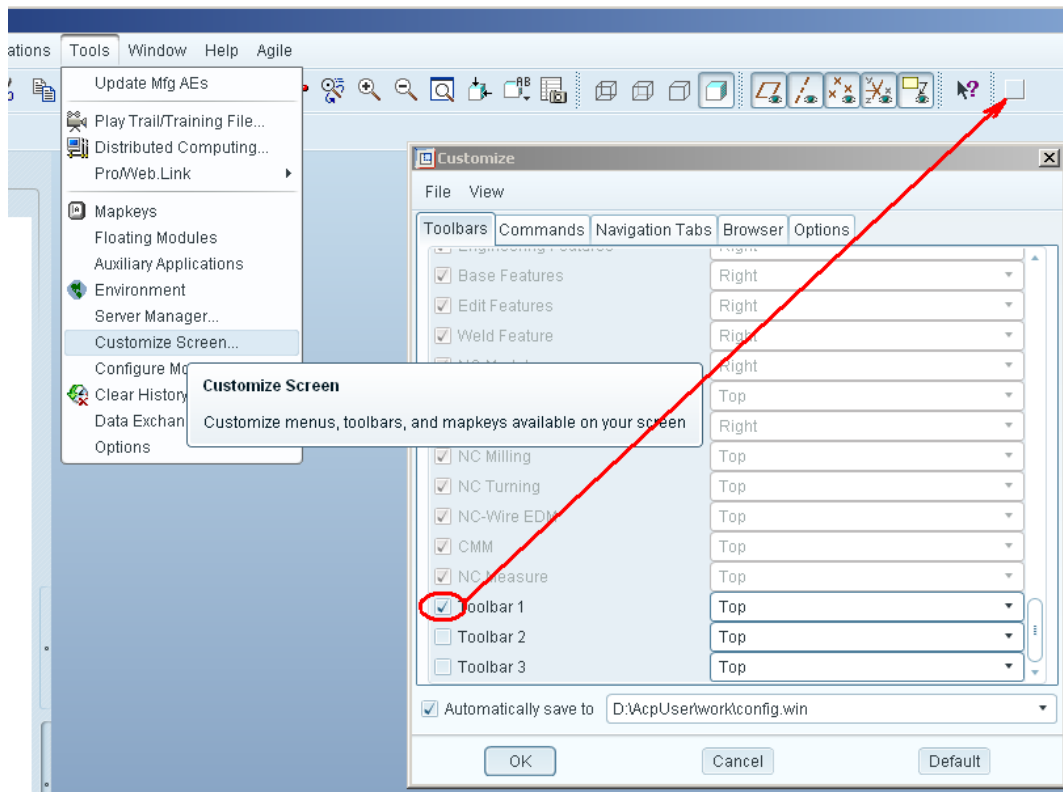
Creating the Agile Toolbar in Pro/E

This step is optional; it will create a toolbar that you can use to run the Agile commands, in addition to the Agile menu.

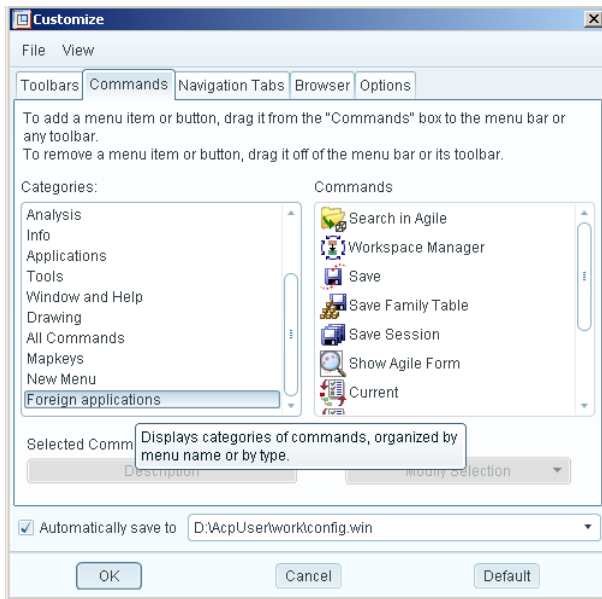
To create the toolbar icon on the Pro/E toolbar:

1. Choose *Tools* → *Customize Screen* and select the Toolbars tab.
2. When you enable the *Toolbar 1* field by clicking the checkbox, a new blank toolbar appears on the main toolbar.

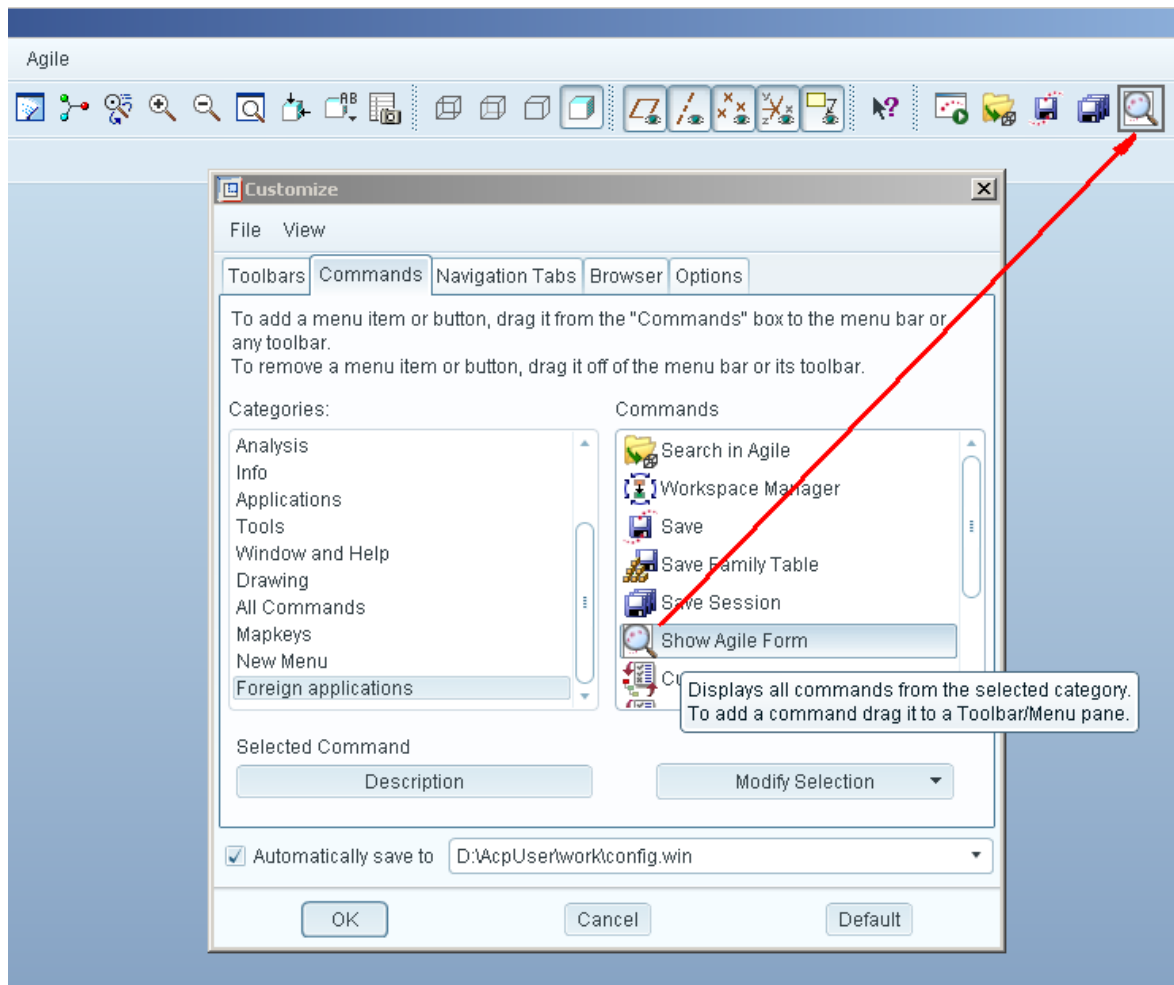
Figure: Enabling the Toolbar



3. Select the *Commands* tab. Scroll down and select *Foreign applications*. The icons of the Agile menu appear in the *Commands* area.

Figure: Toolbar Commands

4. Select a command from the *Commands* area and drag it to the blank toolbar.

Figure: Moving icons to the Toolbar

Installing the EC for Pro/Engineer or Creo on Additional Computers

Once the Pro/E Connector has been installed and configured on one machine, you can install the EC on other machines by copying the entire <Install Directory>\xaccp folder structure and executing the installation wizard again. This works as long as the machines are configured the same in terms of their Pro/E setup, Java setup, etc.

Installing and Configuring the SolidWorks Connector

This section describes setting up the connection between your SolidWorks CAD application and Agile Engineering Collaboration.

The main steps are:

- Extract files from SolidWorks Connector zip file.
- Install the Engineering Collaboration Web Components
- Run the Installer for registration
- If necessary, activate the EC's add-in menu in SolidWorks.

The installation requires the following files:

Main SolidWorks CAD Connector installation package.

Main Web Connector installation package.

Having performed the installation, the following configuration tasks need to be performed:

- Perform the core Agile configuration, as described in the chapter *Agile PLM Server Class Administration* of the *MCAD Connectors for Agile Engineering Collaboration Administration Guide*.
- Configure desired SolidWorks connector parameters as described in the *Administration Guide*.

Extracting Files for the SolidWorks Connector

Create a new folder for the combined Solid Edge and SolidWorks connector, such as **C:\AgileEC\xacw** called your **<Installation Directory>**.

ATTENTION: The required components are registered from the current location. You must not install xacw on a network location. The SolidWorks connector will not work properly if installed on network drives.

Extract the SolidWorks Connector installation file in new and empty folder location **<Installation Directory>**. When you unzip, make sure that you retain the folder paths from the zip file. When the files are unzipped, you should see a folder named **components**, which contains the connector installation.

Extract the Web Components installation file into the **components** subfolder in the **<Installation Directory>**. When you unzip, make sure that you retain the folder paths from the zip file. If you are prompted for overwriting existing files always accept.

Run the setup as described in the next chapter.

Now follow the common installation instructions in *Installing the Web Components*.

Setup the SolidWorks Connector using the Installer

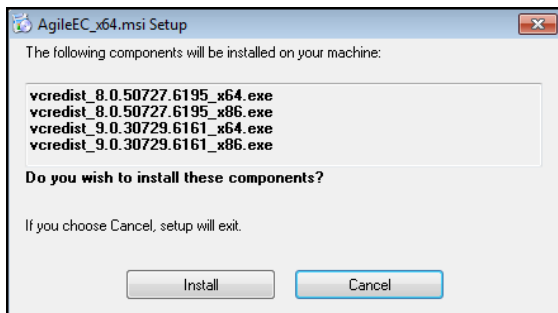
The installer checks the local system for already installed components and prerequisites.

Depending on your system architecture, launch the installer for 32 or 64 bit.

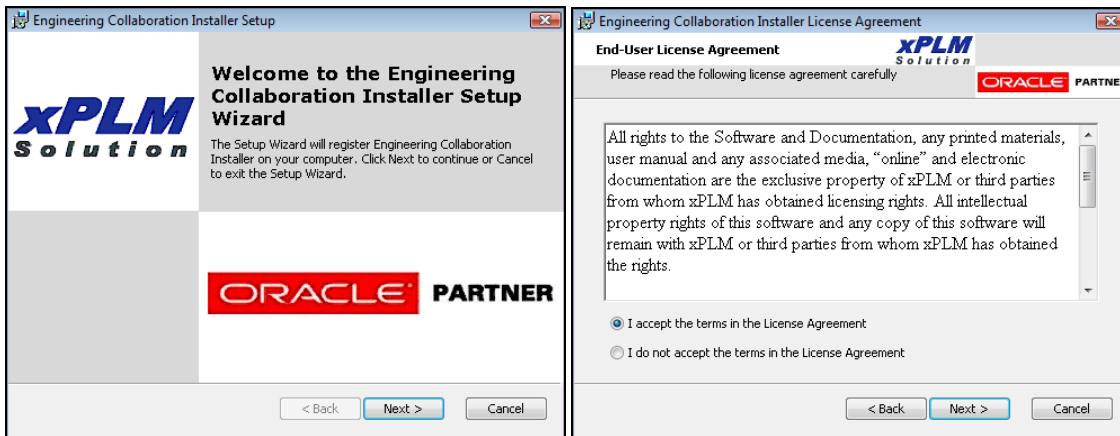
- On 64 bit machines the installer is launched using the **setup_x64.exe** located in the **install** directory.
- On 32 bit machines the installer is launched using the **setup_x86.exe** located in the **install** directory.

ATTENTION: On Windows 7 machines make sure you choose “Run as administrator”

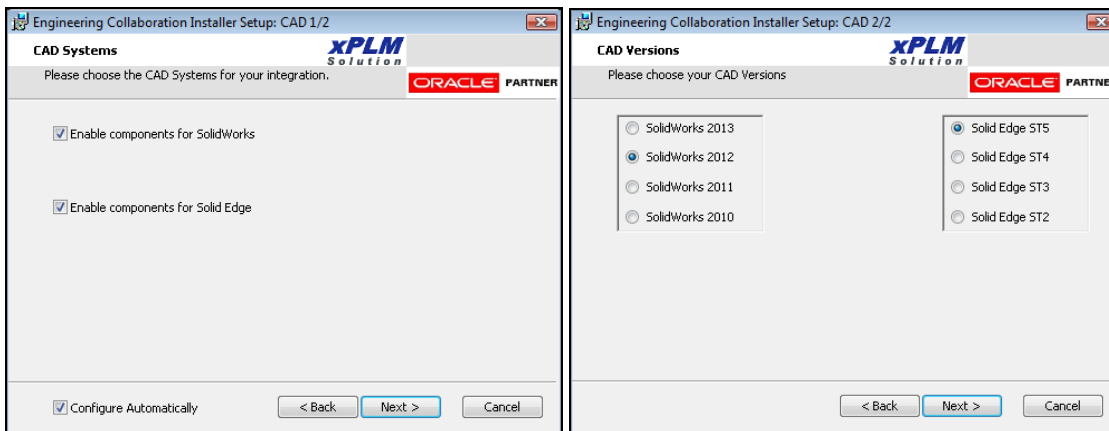
The installer checks the Microsoft C++ runtime environment. In case a component is missing on the local system, the missing components are displayed. You have to select the *Install* button in order to continue with the setup.



Now the C++ runtime environments are installed and the installation of EC starts.

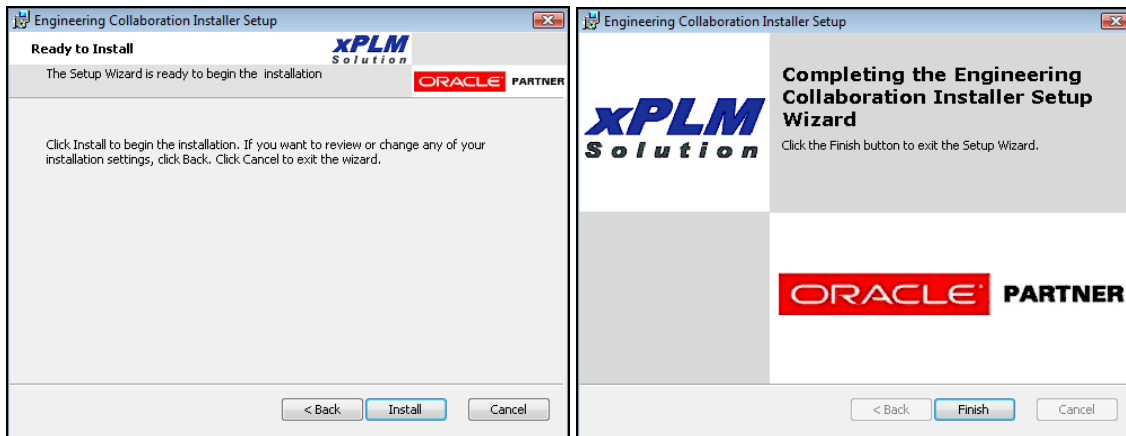


Click on the *Next* button and accept the license agreement, click on the *Next* button again to proceed.



The available CAD versions are displayed. Select the desired CAD version for installation and click on the *Next* button.

Now the configuration is complete and you can use the *Install* to start the installation process.



ATTENTION: The installer registers the `xPLMRootDir` environment variable. On some machines a reboot is required to make this setting known in the system. If the *Load from PLM* command does not work, check the `xPLMRootDir` setting and reboot once after the installation.

ATTENTION: After the installation and first-time start of the integration, access requests from local firewalls might occur (examples are shown in the following screenshots). Make sure to allow access in such cases.



Microsoft .NET environment on older Windows operating systems

The connector requires a Microsoft .NET runtime environment installed on the CAD machine. In case you see this error message during a save process you have to install the Microsoft .NET V3.5 Compact redistributable environment or the Microsoft .NET framework 3.5 from the Microsoft download pages.



Setting the Workspace Root

Open the file `<Install Directory>\xacw\components\com\start_acx.bat` in a text editor. Here you can edit the working directories. The Workspace Root is set with the following statements:

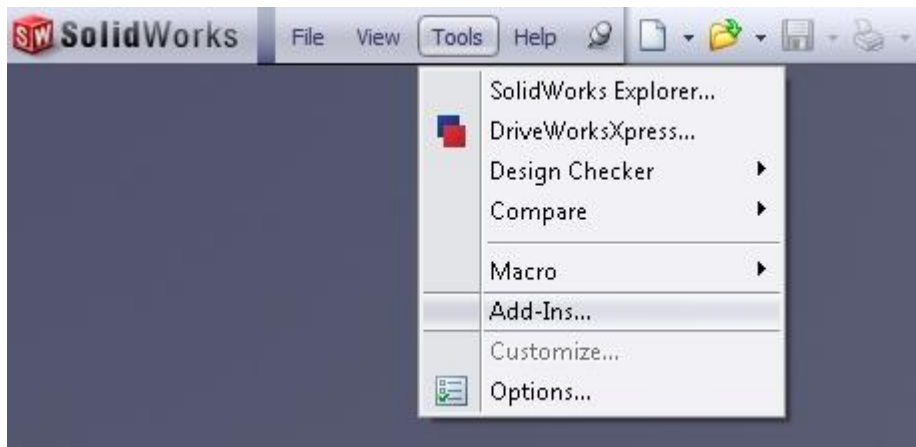
```
set cax_temp=C:\AgileEC\wspaces\Default\  
set CAX_WORKSPACE_ROOT=C:\AgileEC\wspaces
```

Also make sure the file `<Install Directory>\xacw\components\xml\xPLMComConnector.xml` points to that directory:

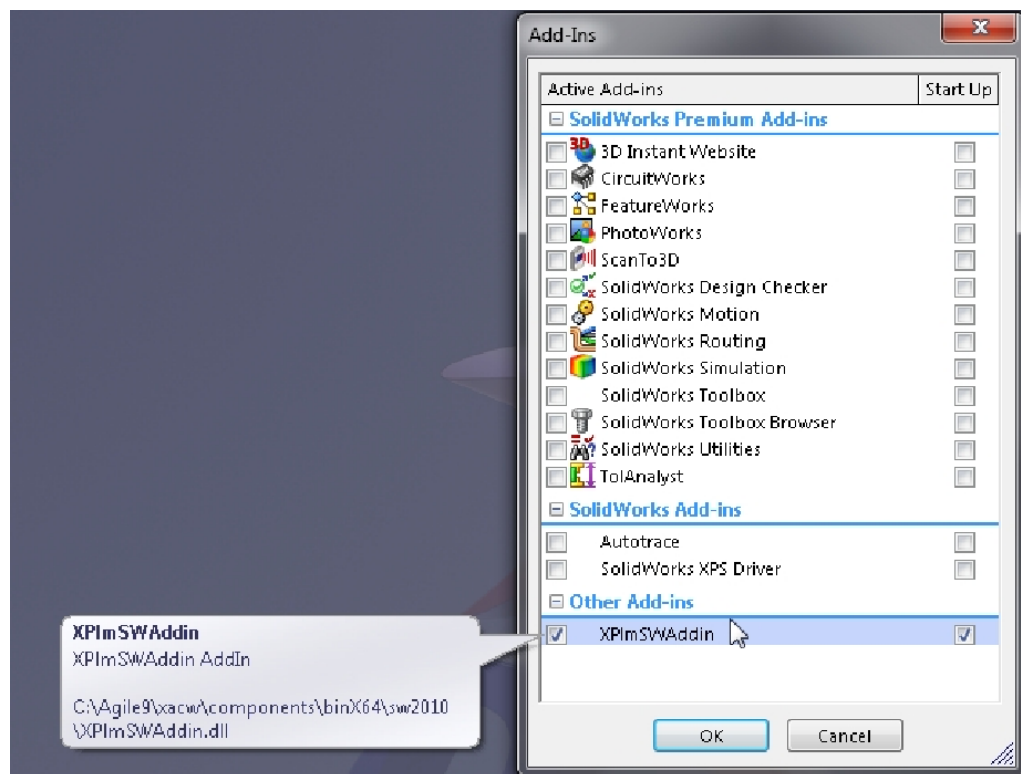
```
<LocalWorkDir>C:\AgileEC\wspaces\Default\</LocalWorkDir>
```

Creating the Agile Menu in SolidWorks

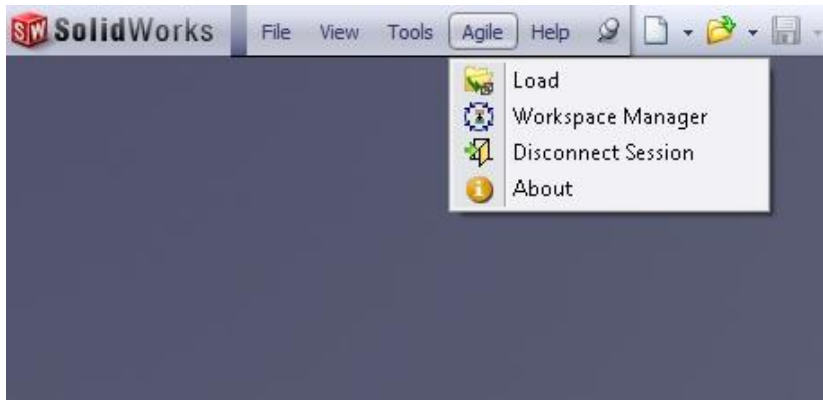
The integration is loaded into the SolidWorks menu using an add-in. After you completed the installation and registration, enable the EC add-in in SolidWorks.



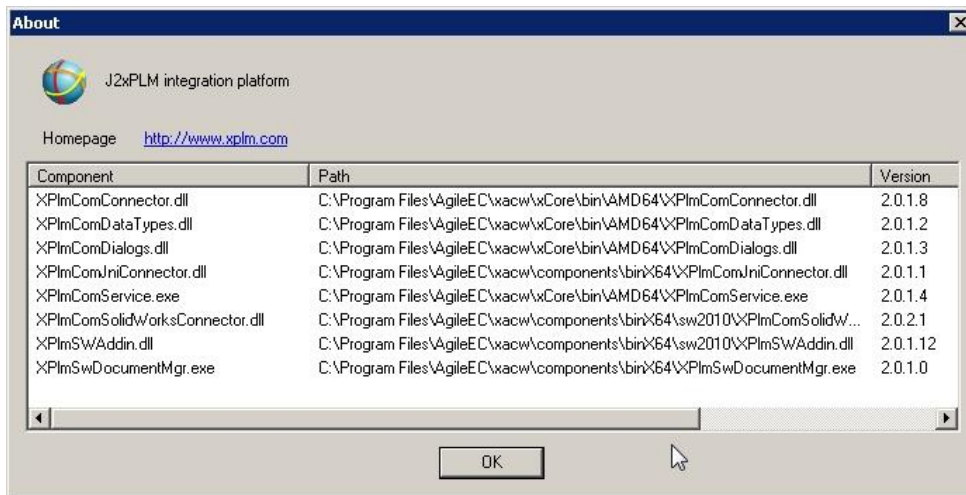
Make sure you check the *XPlmSWAddin* and the *Start Up* checkbox column.



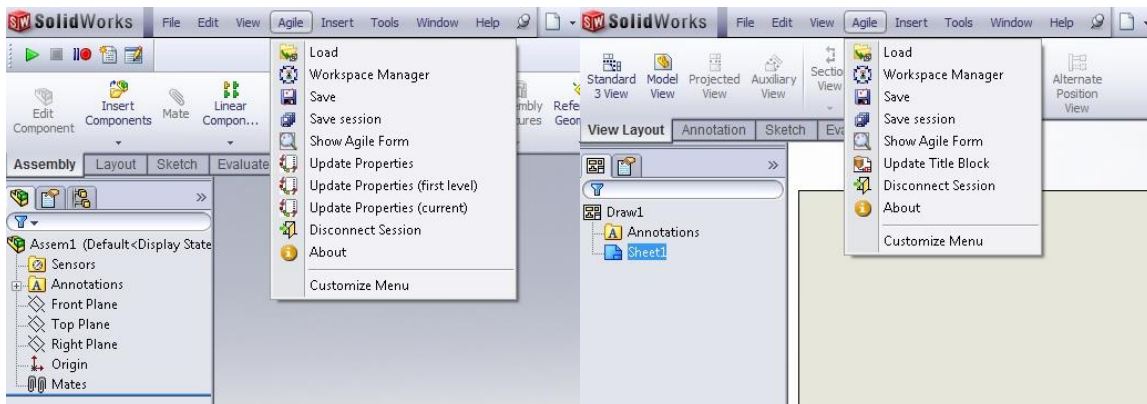
After startup of the add-in you see the Agile base menu inside SolidWorks:



The About menu will show the required registered components.



The Agile menu is context specific, so there are three different menus for Parts, Assemblies and Drawings as shown below.



Installing the EC for SolidWorks on Additional Computers

Once the SolidWorks Connector has been installed and configured on one machine, you can install on other machines simply by copying the entire **<Install Directory>\xacw** folder structure and executing the installation wizard again. This works as long as the machines are configured the same in terms of their SolidWorks setup, Java setup, etc.

Installing and Configuring Solid Edge Connector

This section describes setting up the connection between your Solid Edge CAD application and Agile Engineering Collaboration.

The main steps are:

- Extract files from Solid Edge connector zip file.
- Install the Engineering Collaboration Web Components
- Run the installation wizard for registration

The installation requires the following files:

Main Solid Edge CAD Connector installation package.

Main Web Connector installation package.

Having performed the installation, the following configuration tasks need to be performed:

- Perform the core Agile configuration, as described in the chapter *Agile PLM Server Class Administration of the MCAD Connectors for Agile Engineering Collaboration Administration Guide*.
- Configure desired Solid Edge Connector parameters as described in the *Administration Guide*.

Extracting Files for Solid Edge Connector

Create a new folder for Solid Edge connector, such as **C:\AgileEC\xace** called your **<Installation Directory>**.

ATTENTION: The required components are registered from the current location. You must not install xace on a network location. The Solid Edge connector will not work properly if installed on network drives.

Extract the Solid Edge Connector installation file in new and empty folder location **<Installation Directory>**. When you unzip, make sure that you retain the folder paths from the zip file. When the files are unzipped, you should see a folder named **components**, which contains the connector installation.

Extract the Web Components installation file into the **components** subfolder in the **<Installation Directory>**. When you unzip, make sure that you retain the folder paths from the zip file. If you are prompted for overwriting existing files always accept.

Run the setup as described in the next chapter.

Now follow the common installation instructions in *Installing the Web Components*.

Setup the Solid Edge Connector using the Installer

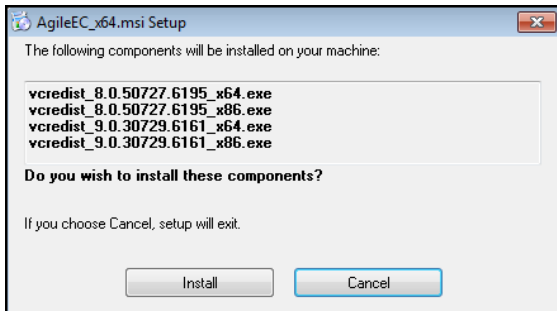
The installer checks the local system for already installed components and prerequisites.

Depending on your system architecture, launch the installer for 32 or 64 bit.

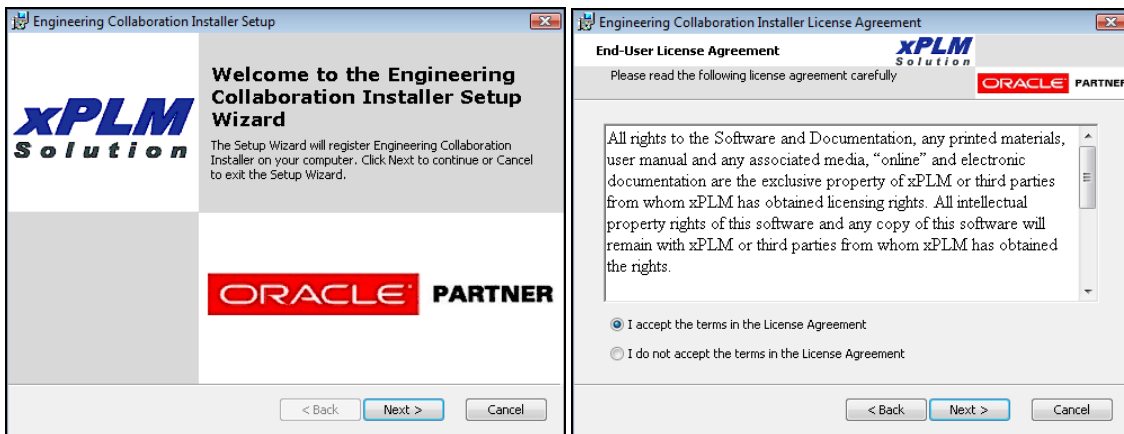
- On 64 bit machines the installer is launched using the **setup_x64.exe** located in the **install** directory.
- On 32 bit machines the installer is launched using the **setup_x86.exe** located in the **install** directory.

ATTENTION: On Windows 7 machines make sure you choose “Run as administrator”

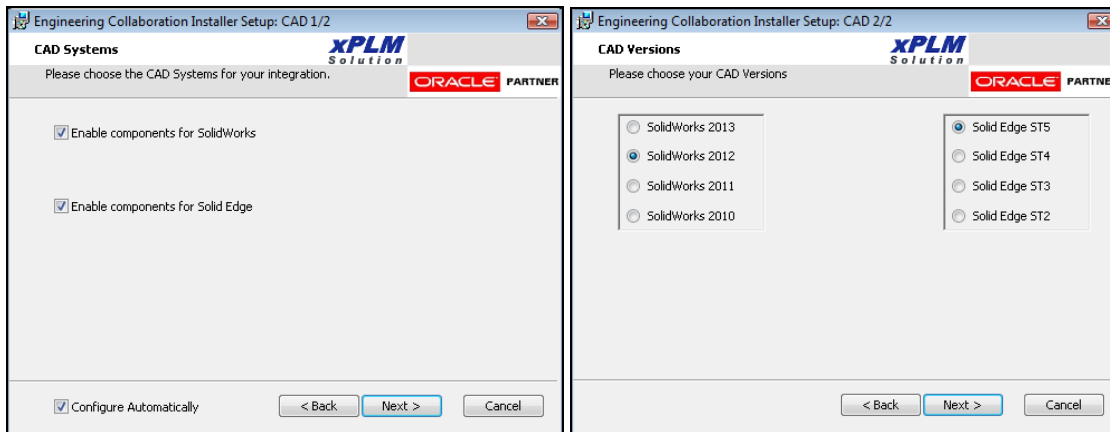
The installer checks the Microsoft C++ runtime environment. In case a component is missing on the local system, the missing components are displayed. You have to select the *Install* button in order to continue with the setup.



Now the C++ runtime environments are installed and the installation of EC starts.

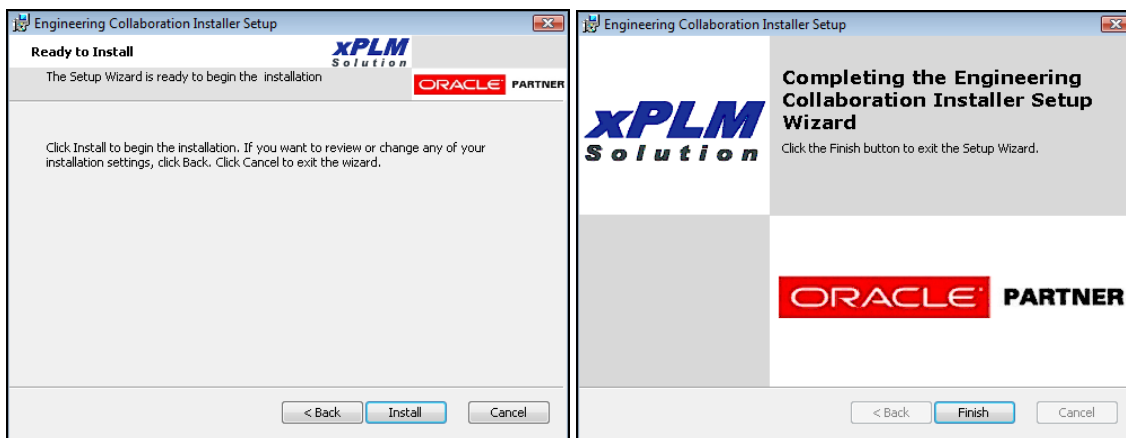


Click on the *Next* button and accept the license agreement, click on the *Next* button again.



The available CAD versions are displayed. Select the desired CAD version for installation and click on the *Next* button.

Now the configuration is complete and you hit *Install* to start the component registration.



ATTENTION: The installer registers the xPLMRootDir environment variable. On some machines a reboot is required to make this setting known in the system. Especially if the Load from PLM command doesn't work, check the xPLMRootDir setting and reboot once after the installation.

ATTENTION: After the installation was completed and you have started the integration or the add-in for the first time you may see some alerts from local firewalls. EC establishes a socket connection between CAD and EC Webcomponent. If you see any of the following screens, make sure you allow the access. Otherwise EC will not work properly.



Setting the Java Version

This chapter describes the settings that should be created after you ran the installer.

The Web Connector installation contains the necessary JRE (32 bit and 64 bit). If you are running Solid Edge 32 bit or 64 bit you have to check the PATH setting to include the required `jvm.dll` of the right JRE.

For a 32 bit Solid Edge application you have to set the 32 bit JRE environment into your system path like this:

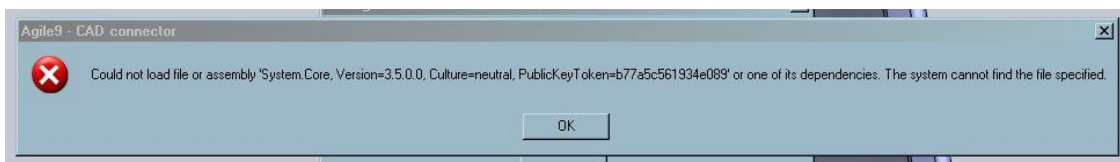
```
set PATH=[inst]\components\jre6\bin\client;[inst]\components\jre6\bin;%PATH%
```

For a 64 bit Solid Edge application you have to set the 64 bit JRE environment and 32 bit JRE environment into your system path like this:

```
set PATH=[inst]\components\jre6_64\bin\server;[inst]\components\jre6_64\bin;[inst]\components\jre6\bin\client;[inst]\components\jre6\bin;%PATH%
```

Microsoft .NET environment on older Windows operating systems

The connector requires a Microsoft .NET runtime environment installed on the CAD machine. In case you see this error message during a save process you have to install the Microsoft .NET V3.5 Compact redistributable environment or the Microsoft .NET framework 3.5 from the Microsoft download pages.



Setting the Workspace Root

Open the file `<Install Directory>\xacw\components\com\start_ace.bat` in a text editor. Here you can edit the working directories. The Workspace Root is set with the following statements:

```
set cax_temp=C:\AgileEC\wspaces\Default\  
  
set CAX_WORKSPACE_ROOT=C:\AgileEC\wspaces
```

Also make sure the file `<Install Directory>\xacw\components\xml\xPLMConnector.xml` points to that directory:

```
<LocalWorkDir>C:\AgileEC\wspaces\Default\</LocalWorkDir>
```

Installing on Additional Computers

Once the Solid Edge Connector has been installed and configured on one machine, you can install on other machines simply by copying the entire **<Install Directory>\xace** folder structure. You have to rerun the registration using the installer as described above. This works as long as the machines are configured the same in terms of their Solid Edge setup, Java setup, etc.

How to setup Solid Edge and SolidWorks Connector in parallel on one machine

This section describes setting up the connection between your CAD applications and Agile Engineering Collaboration, if you want to use more than one CAD system on the same machine.

The main steps are:

- Extract files from Solid Edge Connector zip file.
- Extract files from SolidWorks Connector zip file.
- Install the Engineering Collaboration Web Components
- Run the installer.

The installation requires the following files:

Main Solid Edge CAD Connector installation package.

Main SolidWorks Connector installation package.

Main Web Connector installation package.

Performing the installation steps described here will enable the Agile menu to appear within Solid Edge and SolidWorks. In order to have a completely functional integration, you must also:

- Perform the core Agile configuration, as described in the chapter *Agile PLM Server Class Administration* of the *MCAD Connectors for Agile Engineering Collaboration Administration Guide*.
- Configure desired Solid Edge Connector parameters as described in the *Administration Guide*.
- Configure desired SolidWorks Connector parameters as described in the *Administration Guide*.

Extracting Files for the combined CAD Connector

Create a new folder for the combined Solid Edge and SolidWorks connector, such as `C:\AgileEC\lax` called your **<Installation Directory>**.

ATTENTION: The required components are registered from the current location. You must not install xace on a network location. The Solid Edge connector will not work properly if installed on network drives.

Extract the **Solid Edge** installation file into the **<Installation Directory>**. When you unzip, make sure that you retain the folder paths from the zip file. When the files are unzipped, you should see a folder named **components**, which contains the Solid Edge Connector installation.

Extract the **SolidWorks** installation file into the same **<Installation Directory>**. When you unzip, make sure that you retain the folder paths from the zip file. If you are prompted for overwriting existing files always accept. When the files are unzipped, you should still see a folder named **components**, which contains the SolidWorks Connector installation.

Extract the **Web Components** installation file into the **components** subfolder in the **<Installation Directory>**. When you unzip, make sure that you retain the folder paths from the zip file. If you are prompted for overwriting existing files always accept.

Run the setup as described in the next chapter.

Now follow the common installation instructions in *Installing the Web Components*.

Setup the Combined Connector using the Installer

The installer checks the local system for already installed components and prerequisites.

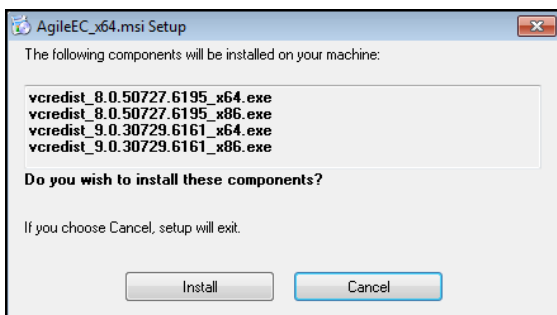
Depending on your system architecture launch the installer for 32 or 64 bit.

On 64 bit machines the installer is launched using the **setup_x64.exe** located in the **install** directory.

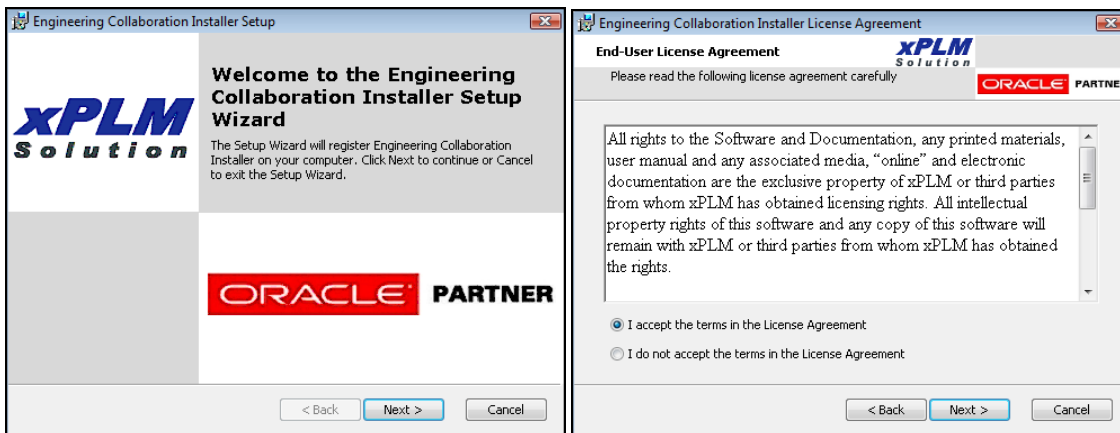
On 32 bit machines the installer is launched using the **setup_x86.exe** located in the **install** directory.

ATTENTION: On Windows 7 machines make sure you choose “Run as administrator”

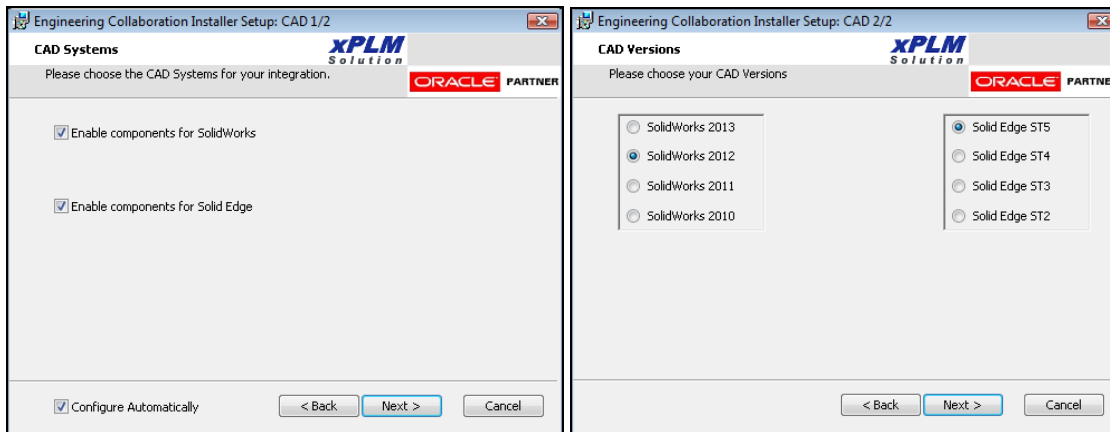
The installer checks the Microsoft C++ runtime environment. In case a component is missing on the local system, the missing components are displayed. You have to select the Install button in order to continue with the setup.



Now the C++ runtime environments are installed and the installation of EC components starts.

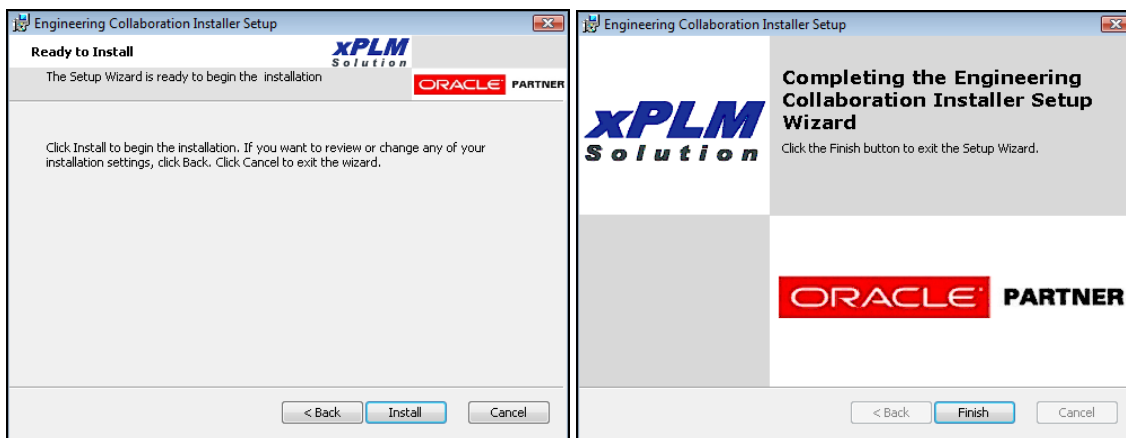


Hit the *Next* button and accept the license agreement and hit the *Next* button again.



The installer detects available integrations in the package where it was started from. Now select the desired CAD version for install and hit the *Next* button.

Now the configuration is complete and you hit *Install* to start the component registration.



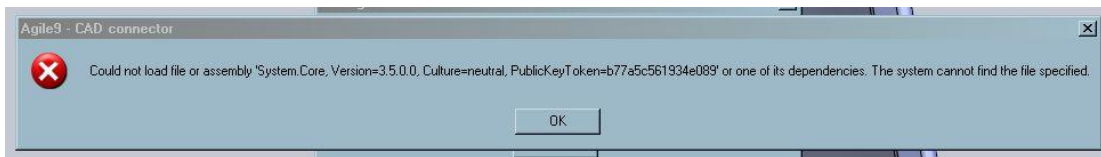
ATTENTION: The installer registers the `xPLMRootDir` environment variable. On some machines a reboot is required to make this setting known in the system. If the *Load from PLM* command does not work, check the `xPLMRootDir` setting and reboot once after the installation.

ATTENTION: After the installation and first-time start of the integration, access requests from local firewalls might occur (examples are shown in the following screenshots). Make sure to allow access in such cases.



Microsoft .NET environment on older Windows operating systems

The connector requires a Microsoft .NET runtime environment installed on the CAD machine. In case you see this error message during a save process you have to install the Microsoft .NET V3.5 Compact redistributable environment or the Microsoft .NET framework 3.5 from the Microsoft download pages.



Setting the Workspace Root

Open the file `<Install Directory>\xacw\components\ini\xacw_ini.bat` in a text editor. Here you can edit the working directories. The Workspace Root is set with the following statements:

```
set cax_temp=C:\AgileEC\wspaces\Default\  
set CAX_WORKSPACE_ROOT=C:\AgileEC\wspaces
```

Also make sure the file `<Install Directory>\xacw\components\xml\xPLMComConnector.xml` points to that directory:

```
<LocalWorkDir>C:\AgileEC\wspaces\Default\</LocalWorkDir>
```

How to Uninstall, Add or Change CAD System Versions

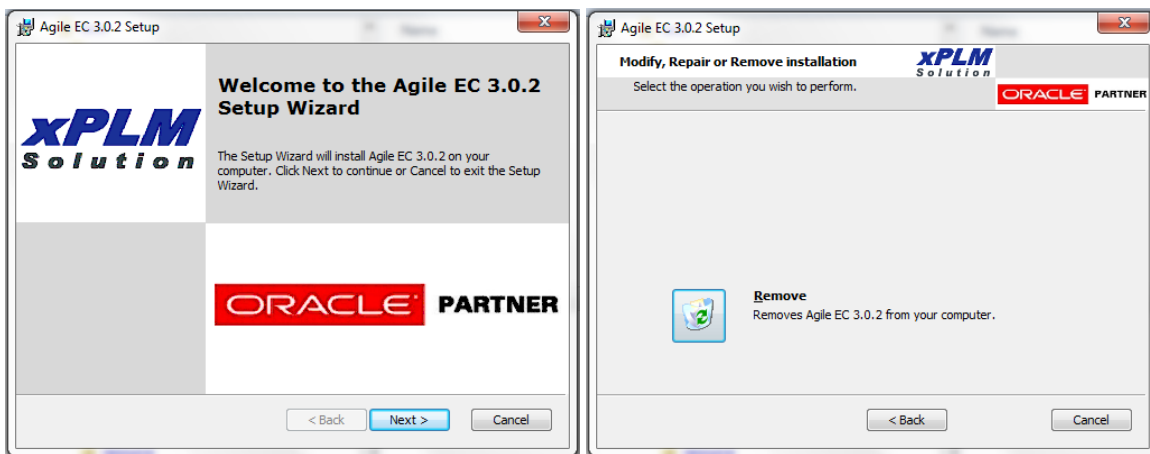
You can run the installer a second time, which will let you uninstall the registration.

Depending on your system architecture you launch the installer for 32 or 64 bit.

On 64 bit machines the installer is launched using the **setup_x64.exe** located in the **install** directory.

On 32 bit machines the installer is launched using the **setup_x86.exe** located in the **install** directory.

ATTENTION: On Windows 7 machines make sure you choose “Run as administrator”



Click on *Next* on the welcome screen and then click on the *Remove* button in order to un-register the integration components.

ATTENTION: If you intend to change the CAD version, you have to run the installer twice: once for the un-registration of the components and again for registering the new CAD versions.

Installing the Web Components

This section describes the common setup procedures for the CAD connectors. This section describes setting up the common connection between your CAD integration and Agile Engineering Collaboration.

The main steps are:

- Extract files from Web Connector Client zip file.
- Running the Load Callback Installer.
- Install the PLM Server Components.

The installation requires the following file:

Main Web Connector Client installation package.

Performing the installation steps described here will enable the CAD connector communication to PLM.

Extracting Files for Web Components for CATIA, Pro/E, NX

Extract the installation file to the folder of the CAD Connector location, e.g. `<Install Directory>\xacp`. When you unzip, make sure that you retain the folder paths from the zip file and the archive will be extracted into the CAD connector directory. When the files are unzipped, you should see additional folders like `jre6` within `xacp` or `xacc` directory.

Extracting Files for Web Components for SolidWorks and Solid Edge

Extract the installation file to the folder **components** of the CAD Connector location, e.g. `<Install Directory>\AgileEC\components`. When you unzip, make sure that you retain the folder paths from the zip file and the archive will be extracted into the CAD connector directory. When the files are unzipped, you should see additional folders like `jre6` within **AgileEC\components**. directory.

Running the Load Callback Installer

This registration step is **NOT** required for SolidWorks, Solid Edge and Office. The installer of the systems includes the Load Callback registration.

This registration step is **NOT** required for the EC Web Component Only Update.

This registration step is **NOT** required if you want to use SolidWorks or Solid Edge connector together with the Pro/E or CATIA connector on the same machine! The installer for SolidWorks, Solid Edge and Office must be executed instead, because it includes the Load Callback registration.

The Load Callback setup installs all required Visual C++ Runtime environments and registers the required Windows components. You need administrator privileges on the local machine.

ATTENTION: On Windows 7 machines make sure you choose “Run as administrator”

Setup on a 32 bit Windows System

Go to the install subdirectory folder inside the connector folder. Follow the steps:

- Run **setup_x86.exe** – Installer for Windows 32 bit machines.
- Follow the instructions and confirm the installation of the required Microsoft runtime environments.
- Confirm the copyrights and continue using the *Next* button until the setup is finished.

Setup on a 64 bit Windows System

Go to the install subdirectory folder inside the connector folder. Follow the steps:

- Run **setup_x64.exe** – Installer for Windows 64 bit machines.
- Follow the instructions and confirm the installation of the required Microsoft runtime environments.
- Confirm the copyrights and continue using the *Next* button until the setup is finished.

Regenerating Attributes.xml

The metadata extraction is optimized in this release. The performance is increased and the Agile List values are now read from the server during runtime. In order to recreate a valid **Attributes.xml** follow the steps below.

The main steps are:

- Go to the MCAD-CONFIG filefolder in PLM.
- Check out the folder.
- Remove the existing **Attributes.xml** file from the files tab.
- Check in the MCAD-CONFIG folder (the file tab must be empty).
- Go to the local AgileCache directory in users home.
- Delete all **Attributes.*** files in the AgileCache directory.
- Start the integration xacc or xacp, the system will regenerate a valid **Attributes.xml** during next login.