



Getting Started with SOLIDWORKS Design Machine-Based Licenses & 3DEXPERIENCE Cloud Services

The following guide should take about 10-15 minutes to complete.

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Platform Activation Guide:

Once you have placed your order with your CADimensions Account Manager, your order will go into processing with our Order Management Department. They will work with Dassault Systèmes to complete the order and send you information about the next steps of the process.

Step 1: Order Processed

After your order has been fully processed, your chosen Admin will receive an email from Dassault Systèmes titled “Your 3DEXPERIENCE platform is ready to use.” This email will contain:

1. Additional information on the activation process and instructions to make sure this was sent to the user who will be the Platform Administrator.
2. A link to “Launch your 3DEXPERIENCE platform.”
3. Information related to your order.

Step 2: Follow the Link and Login

As admin, click the link to “Launch your 3DEXPERIENCE Platform” and then log in with your SOLIDWORKS ID/3DEXPERIENCE ID.

IMPORTANT Please make sure the person who is launching and activating your 3DEXPERIENCE Platform plans to **A)** be an administrator on the platform for license assignments and setting configurations, and **B)** is planned to be a 3DEXPERIENCE Platform licensed user. Licenses will be automatically assigned to this individual upon activation, and they cannot immediately be removed.

Step 3: Accept Terms and Conditions

Once logged in, the admin will need to select the “Make me an Admin” link. This will open the CLOSA Terms and Conditions page, which must be reviewed (scroll through to the bottom), optionally downloaded, and accepted.

Platform Activated!

Once the admin has accepted the terms and conditions, the page will reload and land on their newly activated platform!



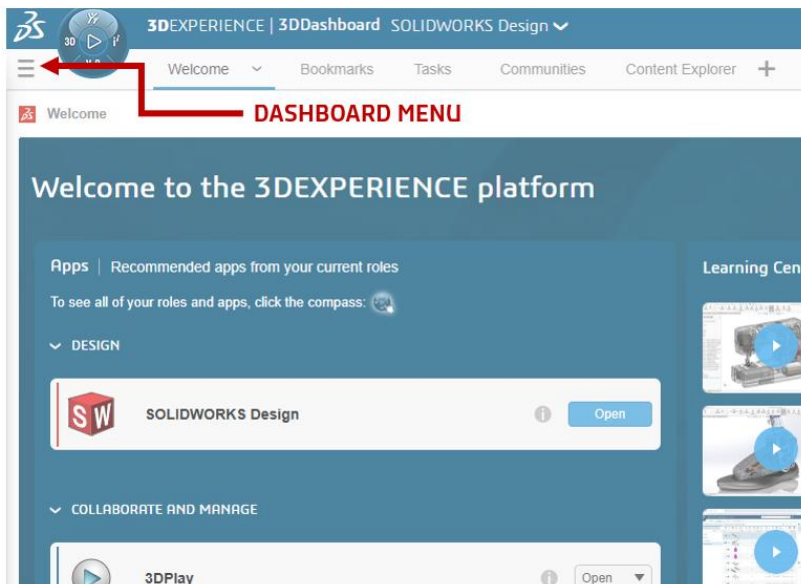
Assigning Roles and Inviting Others:

Once the 3DEXPERIENCE Platform has been activated, the admin will need to invite other members. While inviting other users, the admin will need to assign roles to them as well.

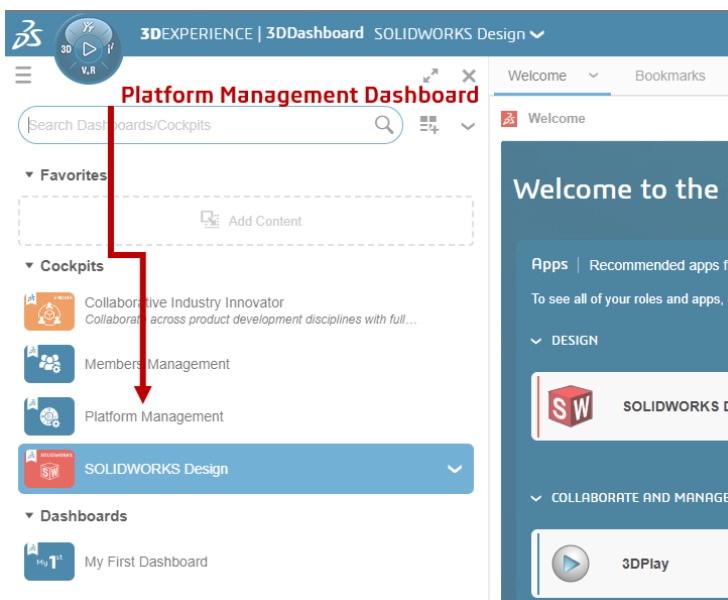
Step 1: Admin Assigning Themselves Roles (If Applicable)

If the Admin will also be a SOLIDWORKS Design user on the platform, they will need to assign those roles to themselves. To start, navigate to the Platform Management Dashboard by following these steps:

1. On the 3DEXPERIENCE Platform landing page, select the dashboard menu in the top left corner of the screen.

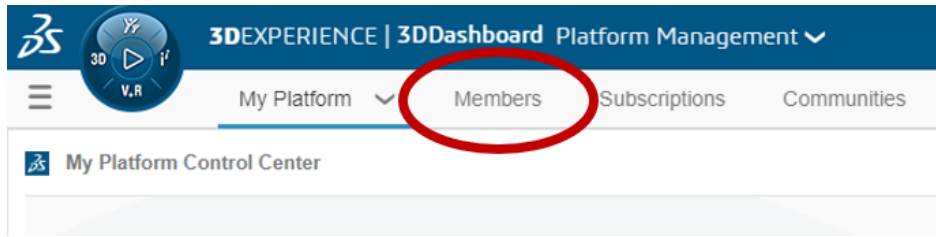



2. In the pop-out menu, scroll down to find and select "Platform Management."

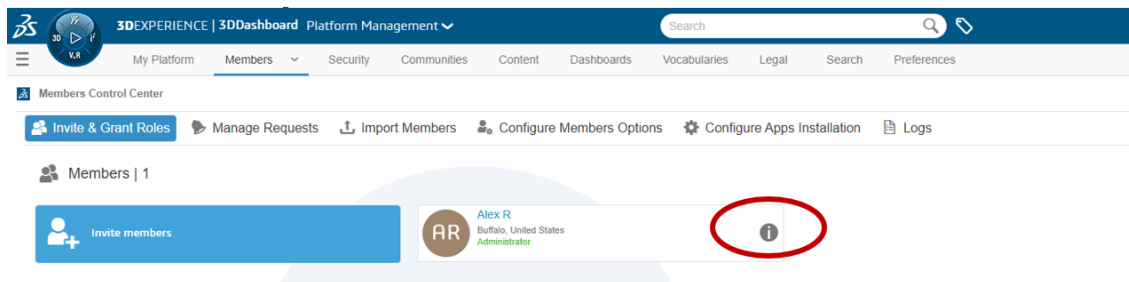




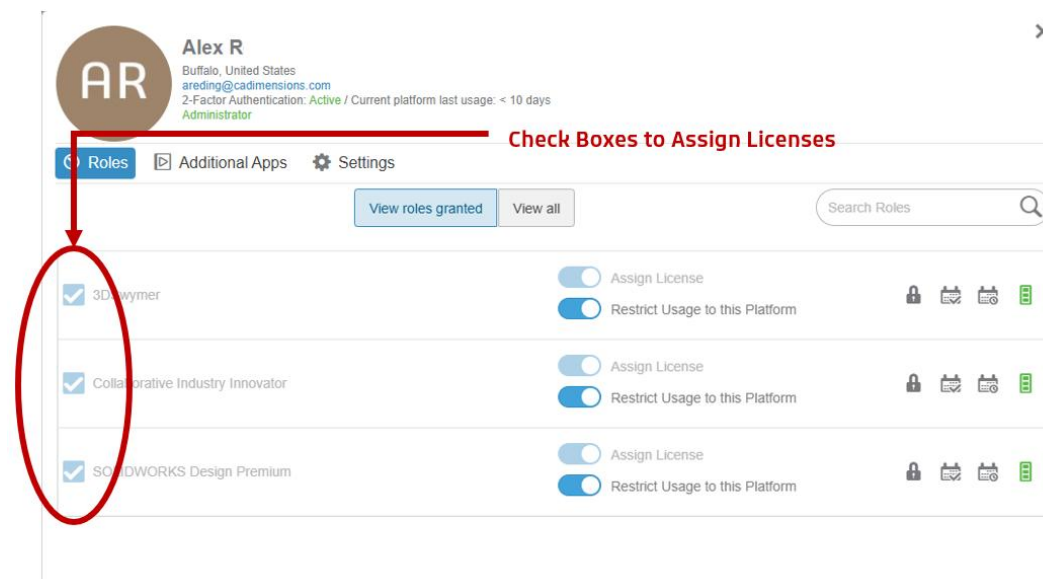
- Once in the Platform Management Dashboard, select the tab at the top for "Members."



- In the members tab, select the  icon in the box with the admins name, on the members section of the page at the top.



- In the pop-up window, make sure to check the boxes of all the roles that need to be assigned. For use of any cloud services, each user will need the 3DSwymmer Role (automatically applied) and Collaborative Industry Innovator. SOLIDWORKS Design users will also need the SOLIDWORKS Design role assigned at the necessary level (Standard, Professional, or Premium).



- Once the roles are assigned, the small pop-up window can be closed.

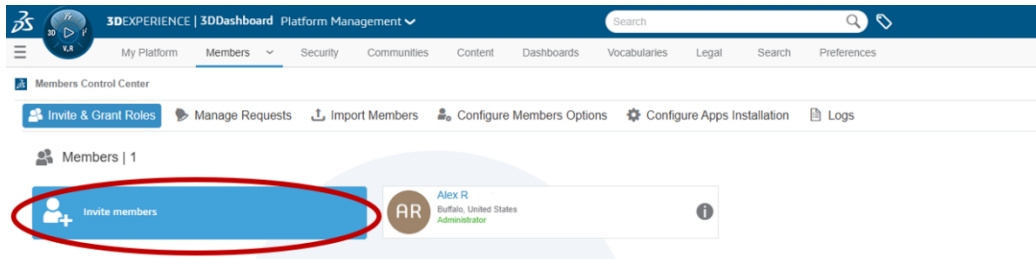




Step 2: Inviting Other Members and Assigning Roles:

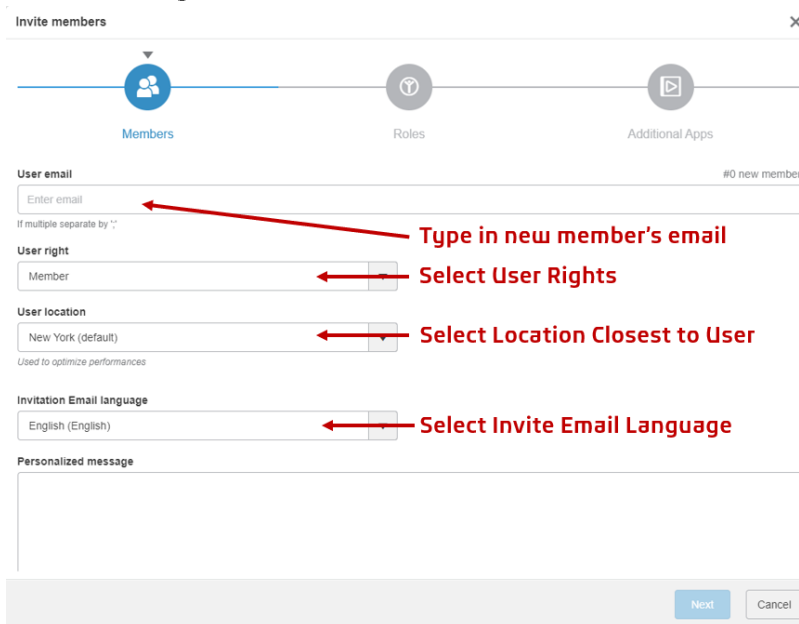
To begin this step, start by navigating to the Platform Management Dashboard, and then to the “Members” tab. Instructions to navigate here are shown in the previous section (Steps 1-3).

1. Once in the Members tab, select the big blue box near the Admin’s member icon that says “Invite Members.”



2. In the pop-up window, fill in the section with the new user’s email address, select their user rights (Member by default), select the closest server location to them, and the language preference for the invitation email.

You can also optionally add a personalized note to the invite. Once all selections are made, click “Next” in the bottom right corner.



Invite members

Members Roles Additional Apps

User email #0 new member
Enter email

If multiple separate by “;”

User right **Select User Rights**

User location **Select Location Closest to User**
New York (default)
Used to optimize performances

Invitation Email language **Select Invite Email Language**
English (English)

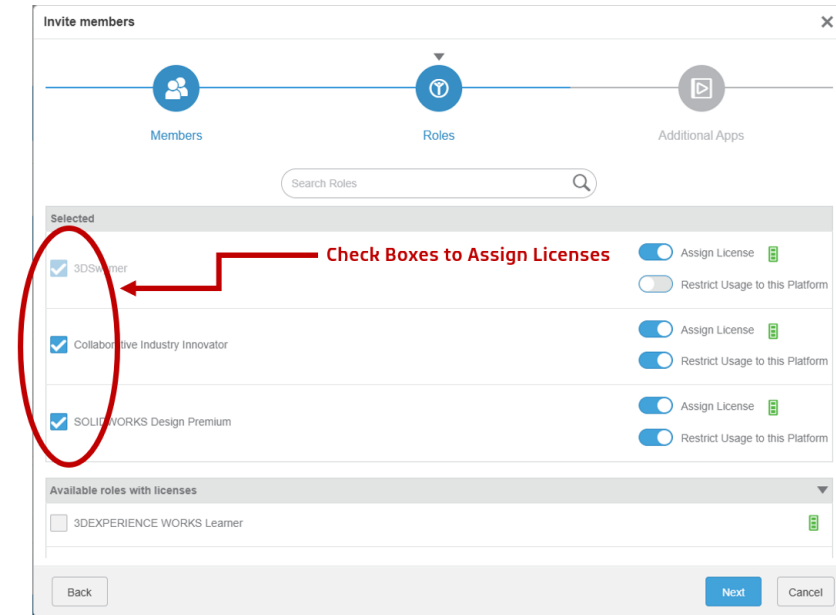
Personalized message

Next Cancel

3. Just like in the previous section, make sure to click the check boxes for the roles you wish to assign to the user. The 3DSwymmer is on by default, but Collaborative Designer for SOLIDWORKS and Collaborative Industry Innovator will need to be selected.

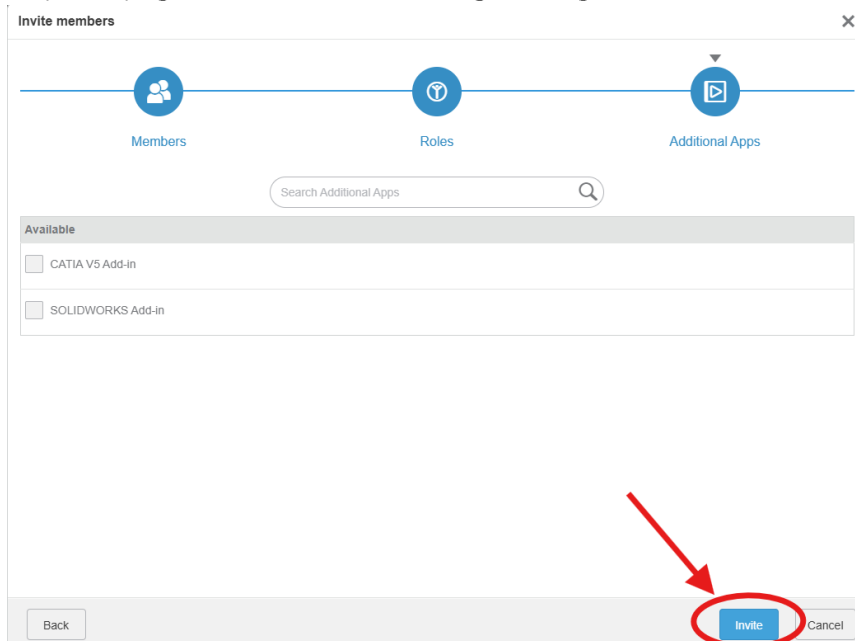
Proceed to next page for additional steps →





After these selections are made, click next again.

4. Lastly, on the “Additional Apps” page of this dialog, there are no further boxes to be checked. You can skip this page and finish the invite by clicking “Invite” in the bottom right corner of the window.



Proceed to next page for additional steps →





Step 3: New Members Invite Activation

Once invited, users will receive an email giving them access to the platform. This invitation will include a link, and when clicked the user will be prompted to login with their SOLIDWORKS ID or 3DEXPERIENCE ID. If they do not have one, they can create one from this dialog.

Once logged in, the user will have successfully activated their seat on the 3DEXPERIENCE Platform and will have access to the roles assigned.





Installing SOLIDWORKS Design (Machine-Based License):

SOLIDWORKS Design (SOLIDWORKS Design Standard, Professional, or Premium) is the full installation of your SOLIDWORKS product. This installation will allow you to work on SOLIDWORKS Design locally on your PC and is not integrated with the cloud connection tools by default.

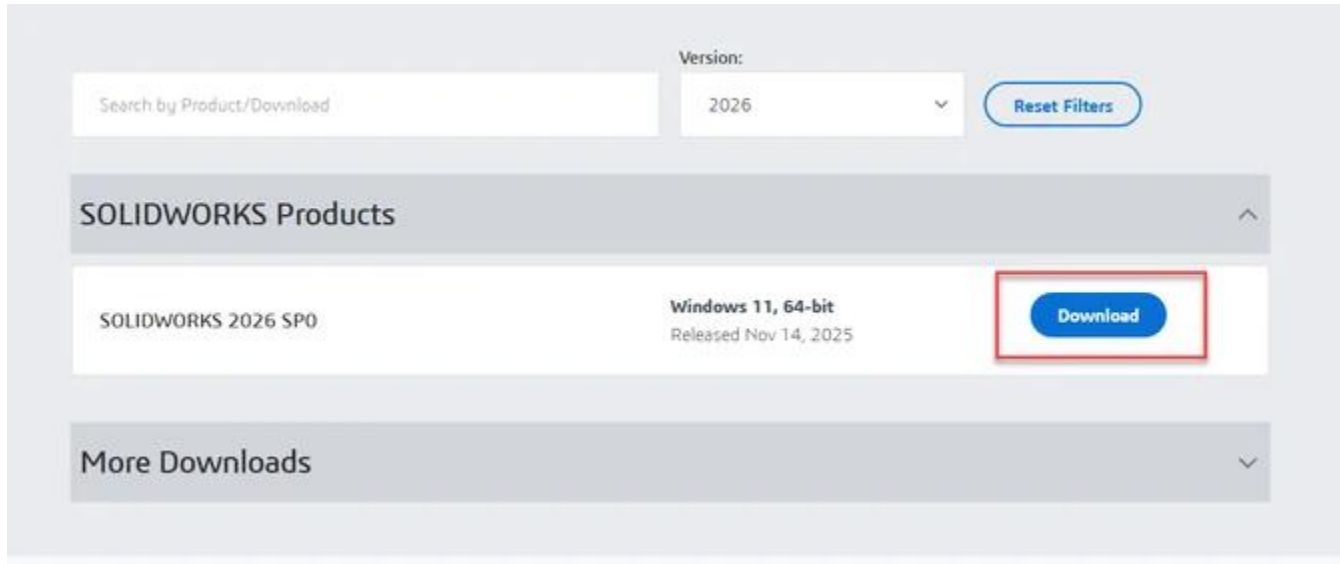
To complete the installation of the cloud connection tools, **please make sure you have completed all previous steps to activate your platform, invite users, and assign the proper roles, including Collaborative Designer for SOLIDWORKS.** This role gives you the add-in needed to utilize tools inside of SOLIDWORKS and in the browser interface for the 3DEXPERIENCE Platform, including cloud data management, Ai capabilities, cloud sharing, and more.

Step 1: Downloading Installation Files

***This guide is for Standalone SOLIDWORKS Design Licenses. If you purchased a Network license, please reach out for those instructions.*

Start by going to <https://www.solidworks.com/support/downloads> and log in with your 3DEXPERIENCE ID/SOLIDWORKS ID.

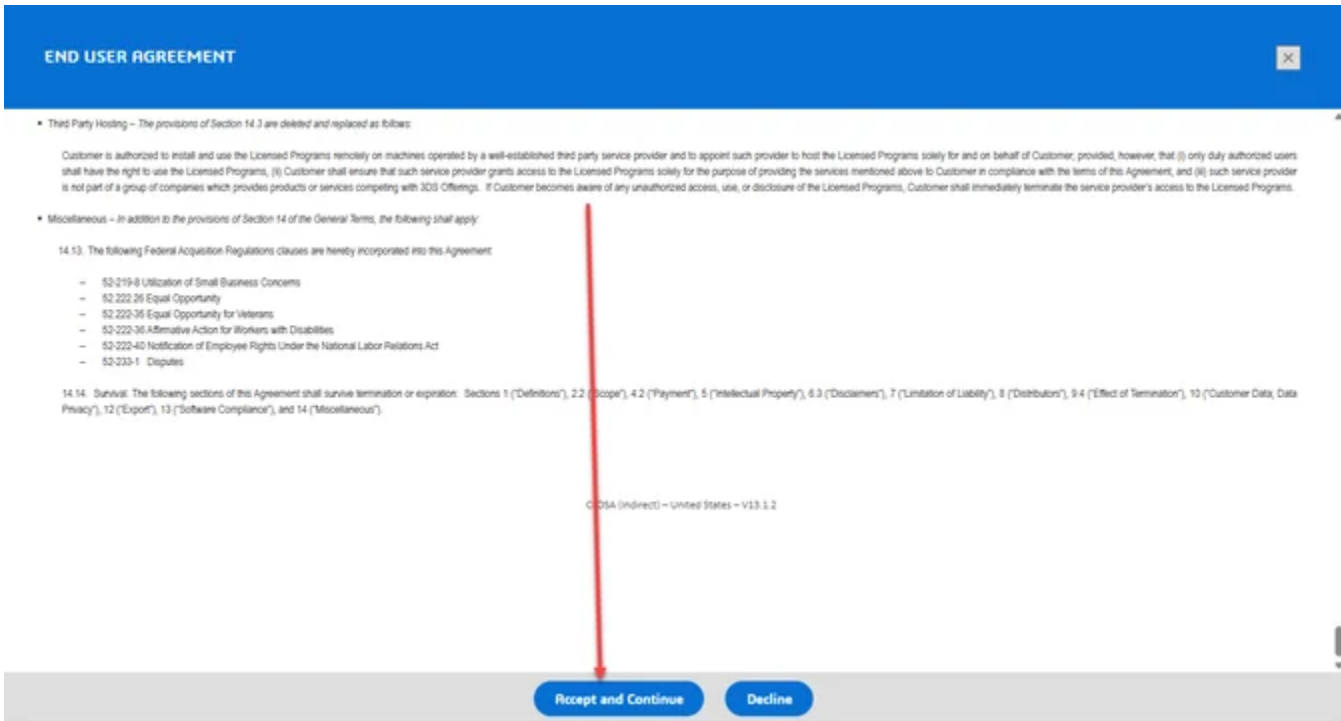
Scroll down (if necessary) and select **Download**, on the version you wish to download. If you need a previous version, you can select the dropdown. SOLIDWORKS allows downloads for the previous 3-4 major versions. If you need a version older than that, contact us to request it.



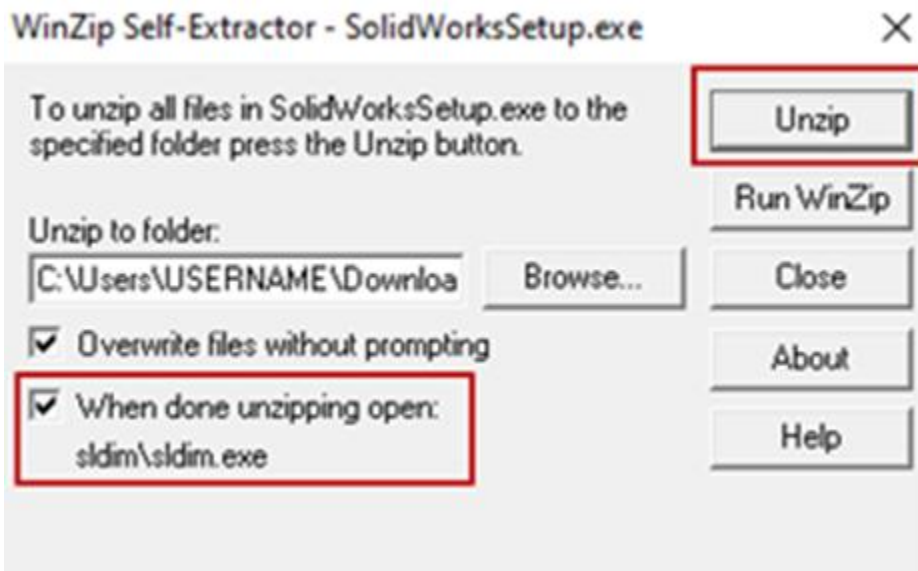
Next, scroll down to the bottom of the page to accept the Customer License Agreement.

Proceed to next page for additional steps →





After completing this, you should see **“SolidWorksSetup.exe”** in your downloads folder. Right click on this file and choose **“Open.”** You should then be prompted to choose where the files are extracted to on your PC. After confirming the location, be sure to check **“When done unzipping open:”** to automatically launch the installation manager.



Proceed to next page for additional steps. →





In the following window, choose **“Download and share all files.”**

Specify the type of installation:

- Install on this computer
- Create an administrative image to deploy to multiple computers
- Install server components
- Download and share all files. Create individual installs or administrative images on multiple machines with a single download.**



Lastly, Confirm the download location, you can select **“Change”** to adjust the location. Accept the **“License Agreement”** If all looks correct **“Download Now.”**

Summary

You are downloading a full copy of 202XSPX.X

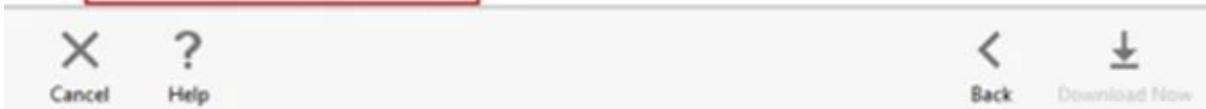
Download Options

Operation:	Download only (to share with any computer)
Download to:	C:\Users\ \Do...OLIDWORKS Downloads\SOLIDWORKS 202XSPX.X
Download method:	Automatic download
Background downloader:	Do not use

Change 

I accept the terms of the SOLIDWORKS [License Agreement](#)

Estimated download size: 15 GB

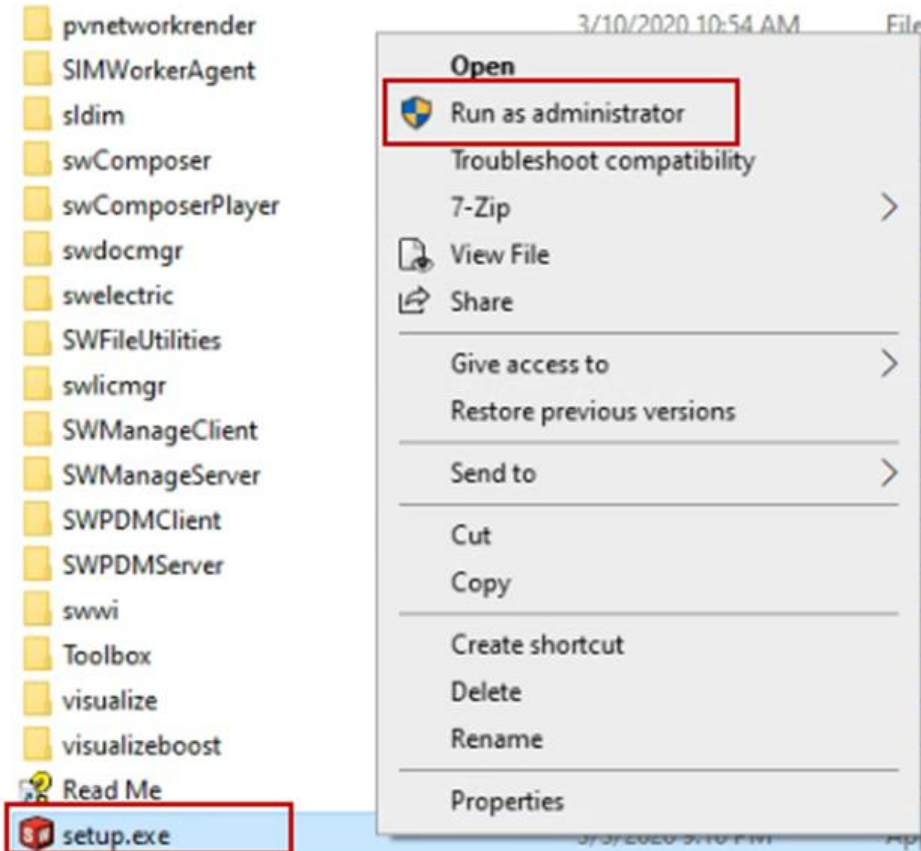


Step 2: Installation

To start the installation after the download has completed, go to the **“Download to:”** location chosen in **previous step**, above. Looks for **“Setup.exe”**, right click and choose **“Run as Administrator”**.

Proceed to next page for additional steps →





Specify the installation type: We will be covering **“Install on this computer”** in this guide.

Specify the type of installation:

- Install on this computer**
- Create an administrative image to deploy to multiple computers
- Install server components
- Download and share all files. Create individual installs or administrative images on multiple machines with a single download.

Proceed to next page for additional steps →





Enter your Serial Number(s) for SOLIDWORKS and any other products. **NOTE: if the 3rd digit of your SN is a "1" STOP and request the Network Installation Guide.**

Serial Number

Enter your serial number information

3D Design

SOLIDWORKS

> Visualization

Visualize, Visualize Boost

> Simulation

Flow Simulation, Motion, Plastics, Simulation

> CAM ⓘ

CAM

> Technical Communication

Composer, Composer Player Pro, Inspection, MBD

> Electrical Design

Electrical, Electrical 3D, PCB

OPTIONAL: Click "Change" to adjust any of the following areas.

> Products

[Change](#) 

> Download Options Background Downloader is on ⓘ

[Change](#) 

> Installation Location

[Change](#) 

> Toolbox/Hole Wizard Options

[Change](#) 

Accept the terms of the License Agreement, then select Install.

I accept the terms of the SOLIDWORKS
[License Agreement](#)

Estimated installation size: 12 GB


Cancel


Help


Back


Install Now





Check “I want to activate my SOLIDWORKS product now” and select “Next.”

Install Complete: If you experienced any failure during the install, please “Save Logs for Support” and create a new [Support Case with the CADimensions Team](#).

Installation is Complete

Show me What's New in SOLIDWORKS 202X

Join the SOLIDWORKS Customer Experience Improvement Program

- Participation directly improves the stability of SOLIDWORKS products.
- Data are continuously analyzed to help determine crash causes, create solutions and identify stability trends.
- System performance is not affected by participating in this program.

[Tell me more](#)

- Yes, I want to join
 No, thank you
 Remind me later

Step 3: Activation

When you launch SOLIDWORKS for the first time you will be prompted to activate your license.

NOTE: if your licenses are currently active on another computer you will not be able to activate. **“Activation count exceeded will be displayed”**

Open the newly installed version of SOLIDWORKS from the Windows Menu.



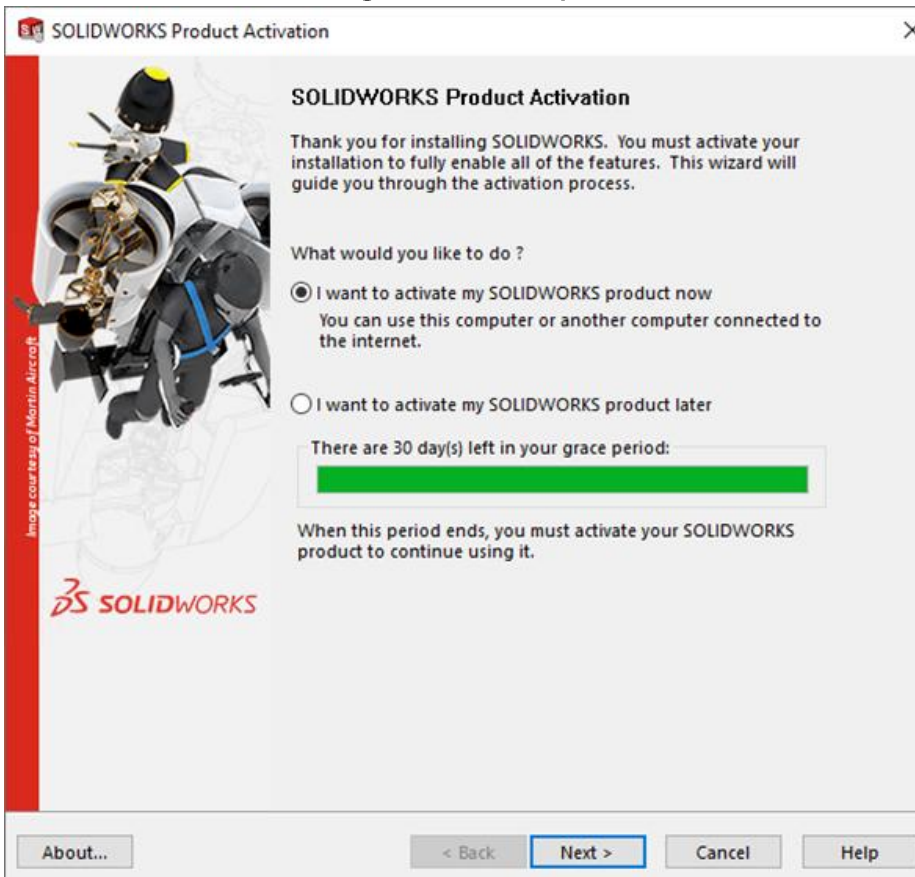
Proceed to next page for additional steps →





SOLIDWORKS Activation will automatically appear on first launch.

Check **“I want to activate my SOLIDWORKS product now”** and select **“Next”**

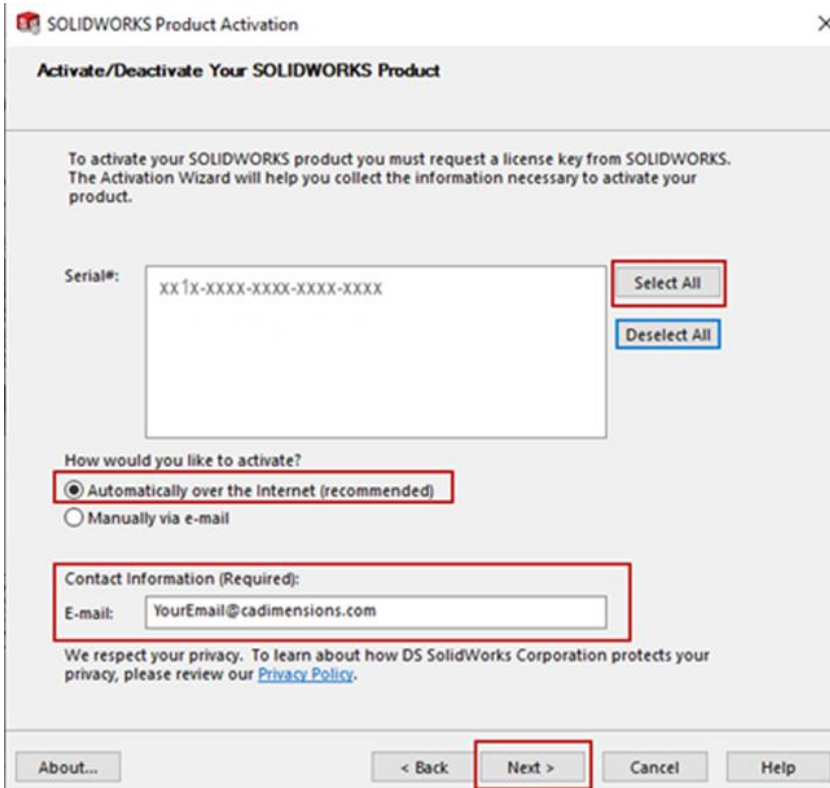


Proceed to next page for additional steps →





Activate: **“Select All”** serial numbers, choose **“Automatically over the Internet”** and enter your **“Email.”**



SOLIDWORKS Product Activation

Activate/Deactivate Your SOLIDWORKS Product

To activate your SOLIDWORKS product you must request a license key from SOLIDWORKS. The Activation Wizard will help you collect the information necessary to activate your product.

Serial#: **Select All**
 Deselect All

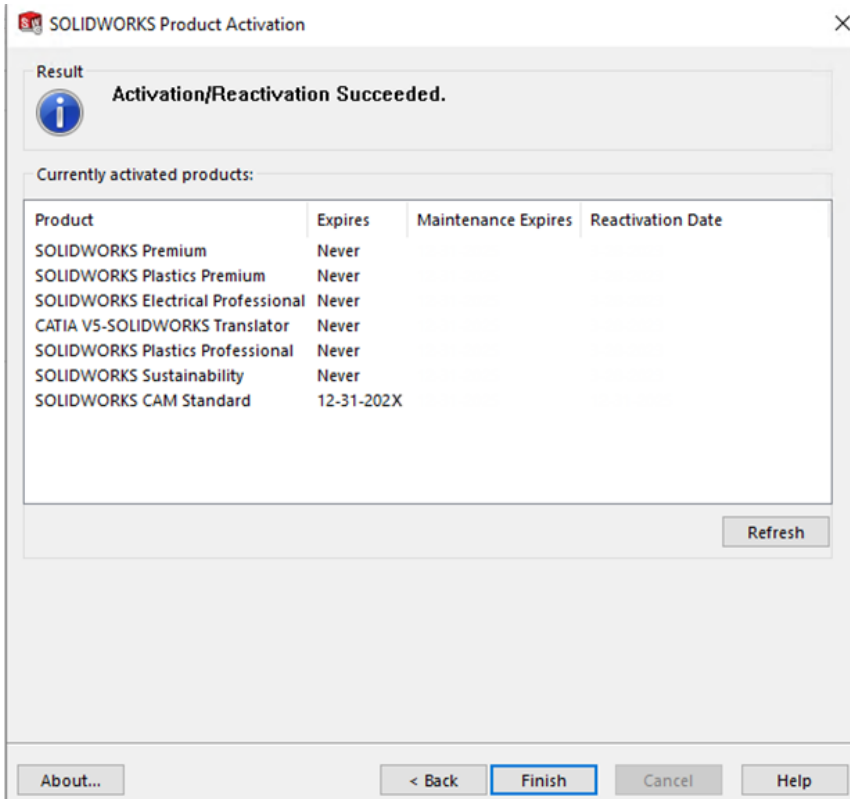
How would you like to activate?
 Automatically over the Internet (recommended)
 Manually via e-mail

Contact Information (Required):
 E-mail:

We respect your privacy. To learn about how DS SolidWorks Corporation protects your privacy, please review our [Privacy Policy](#).

Buttons: About... < Back **Next >** Cancel Help

Review activated license.



SOLIDWORKS Product Activation

Result
Activation/Reactivation Succeeded.

Currently activated products:

Product	Expires	Maintenance Expires	Reactivation Date
SOLIDWORKS Premium	Never		
SOLIDWORKS Plastics Premium	Never		
SOLIDWORKS Electrical Professional	Never		
CATIA V5-SOLIDWORKS Translator	Never		
SOLIDWORKS Plastics Professional	Never		
SOLIDWORKS Sustainability	Never		
SOLIDWORKS CAM Standard	12-31-202X		

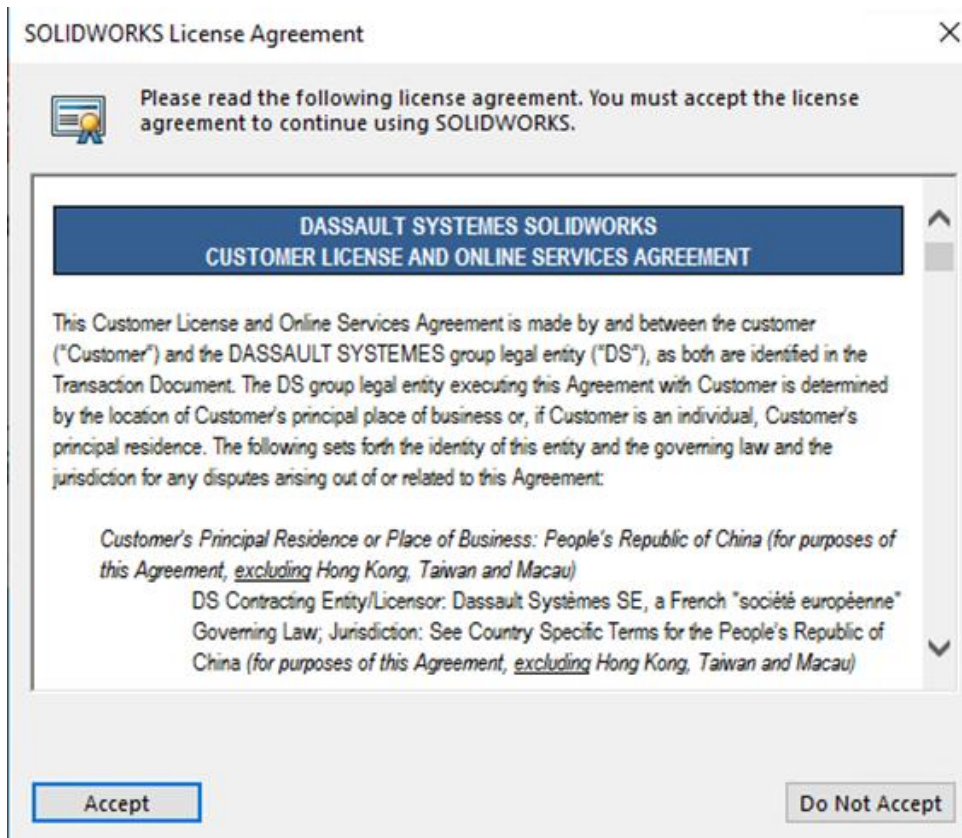
Refresh

Buttons: About... < Back **Finish** Cancel Help





Read and accept the SOLIDWORKS License Agreement.



SOLIDWORKS License Agreement

Please read the following license agreement. You must accept the license agreement to continue using SOLIDWORKS.

**DASSAULT SYSTEMES SOLIDWORKS
CUSTOMER LICENSE AND ONLINE SERVICES AGREEMENT**

This Customer License and Online Services Agreement is made by and between the customer ("Customer") and the DASSAULT SYSTEMES group legal entity ("DS"), as both are identified in the Transaction Document. The DS group legal entity executing this Agreement with Customer is determined by the location of Customer's principal place of business or, if Customer is an individual, Customer's principal residence. The following sets forth the identity of this entity and the governing law and the jurisdiction for any disputes arising out of or related to this Agreement:

Customer's Principal Residence or Place of Business: People's Republic of China (for purposes of this Agreement, excluding Hong Kong, Taiwan and Macau)

DS Contracting Entity/Licensor: Dassault Systèmes SE, a French "société européenne"

Governing Law; Jurisdiction: See Country Specific Terms for the People's Republic of China (for purposes of this Agreement, excluding Hong Kong, Taiwan and Macau)

Accept Do Not Accept

Finished – Your SOLIDWORKS should now be open and ready for use!



Installing Collaborative Designer for SOLIDWORKS Add-in:

The Collaborative Designer for SOLIDWORKS role is an add-in that needs to be installed after your seat of Desktop SOLIDWORKS is installed. This add-in allows you to connect to the 3DEXPERIENCE Platform and use cloud-based services, like cloud PLM, all from within the SOLIDWORKS interface.

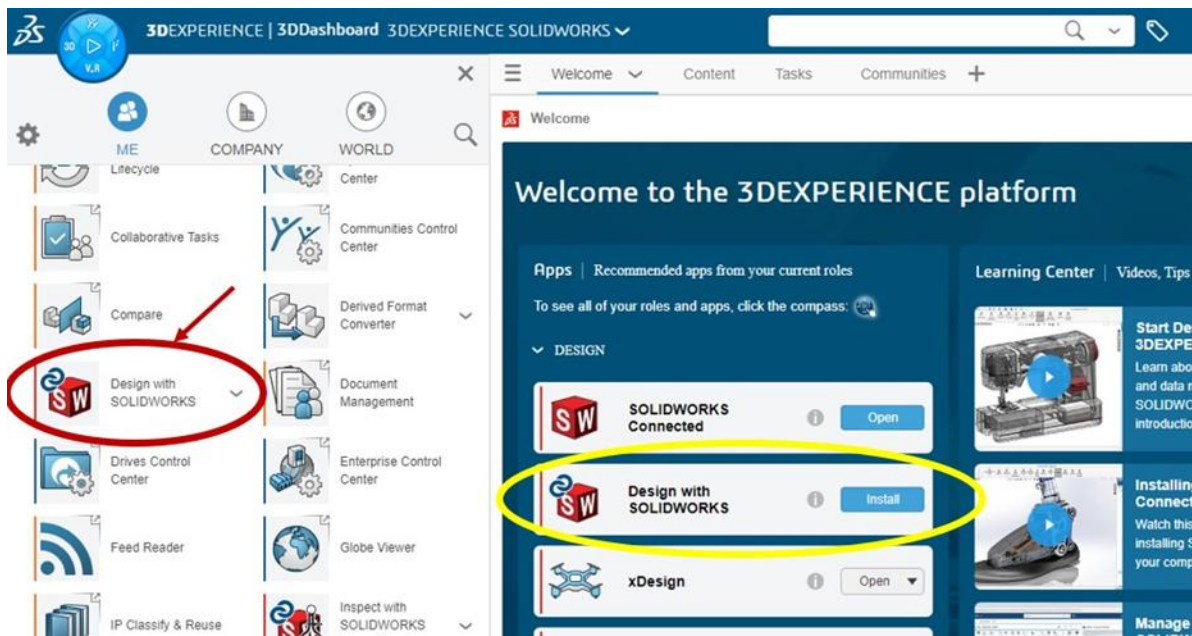
To complete the installation of Collaborative Designer for SOLIDWORKS, **please make sure you have completed all previous steps to activate your platform, invite users, assign the proper roles (including Collaborative Designer for SOLIDWORKS), and completed your install of SOLIDWORKS.**

Step 1: Navigate to the App and Roles Menu

Start by logging into your 3DEXPERIENCE Platform from your browser and click on the compass icon in the top left corner of your window. This will bring up the Roles and App menu in a column on the left side of the window.

In this menu, under “My Apps,” scroll down to select the “Design with SOLIDWORKS” icon.

*Alternatively, if you are in a dashboard with a “Welcome” tab, you can select to install the add-in from here (Show in yellow)

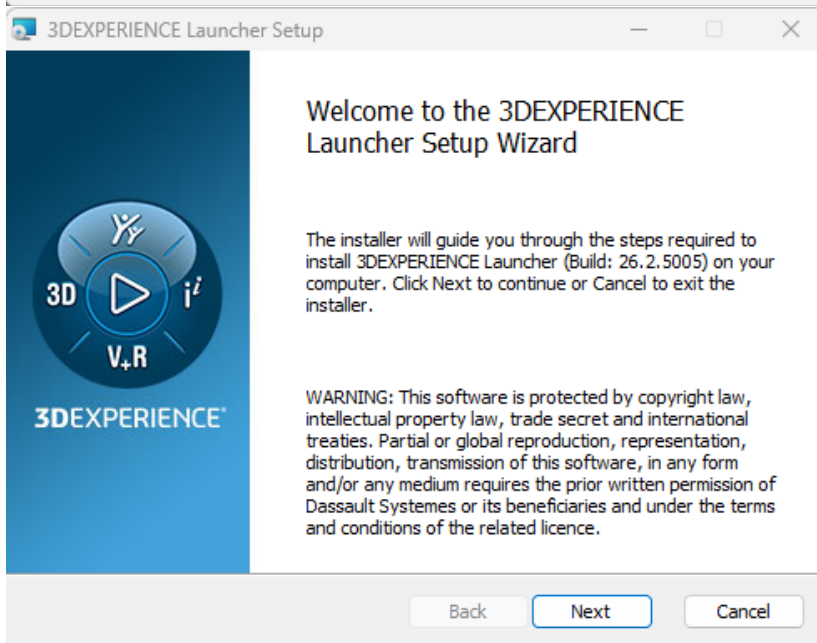
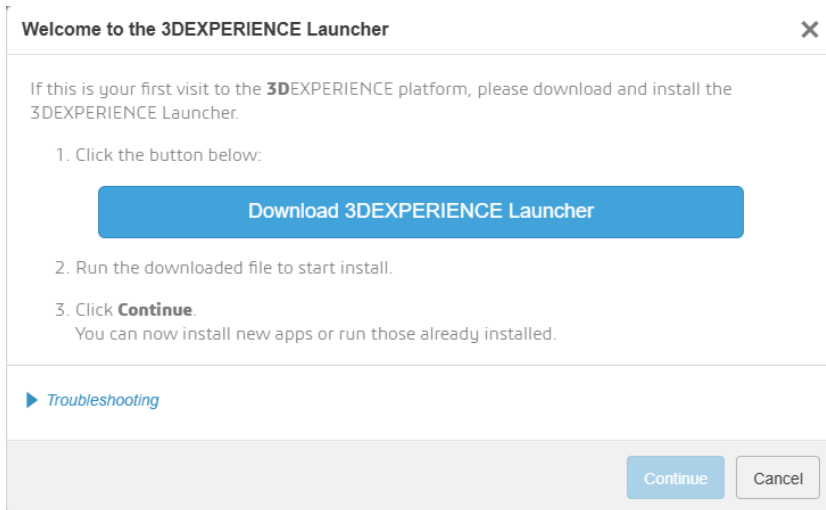


Step 2: Installation

Once the icon has been clicked, a window will pop-up asking you to first install the 3DEXPERIENCE Launcher. Select to “Download 3DEXPERIENCE Launcher” and run the downloaded file to complete that installation.

Proceed to next page for additional steps →





Once the Launcher is fully installed, the previous window should have the “Continue” button highlighted again. If it still shows as greyed out, there may be some settings in your browser that need to be adjusted. Please see the “3DEXPERIENCE Launcher Troubleshooting Section” for more information on next steps.

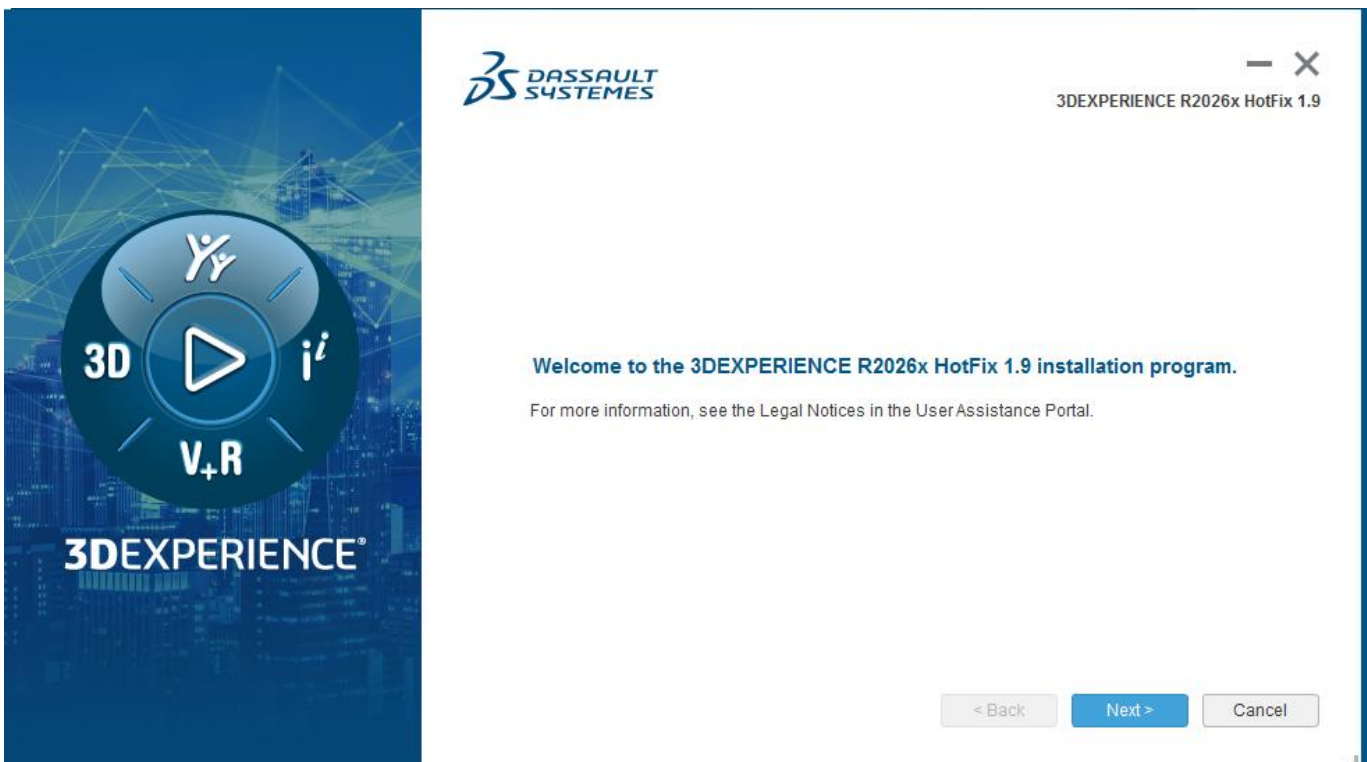
Additionally, make sure to select “always” when prompted about sending/receiving data for the launcher. This will allow the launcher to always connect to the platform to start SOLIDWORKS Design, without having to login once launched.

If a pop-up asks for which roles, select “All Granted Roles containing Collaborative Designer for SOLIDWORKS.”

Proceed to next page for additional steps →



Once the 3DEXPERIENCE Launcher installation is finished, another window will pop-up to walk through the remainder of the installation.



After this installation is completed, you will have the ability to toggle on the Add-in from within the add-in's menu inside of SOLIDWORKS Design.

Step 3: Launching SOLIDWORKS Design with the 3DEXPERIENCE Add-in

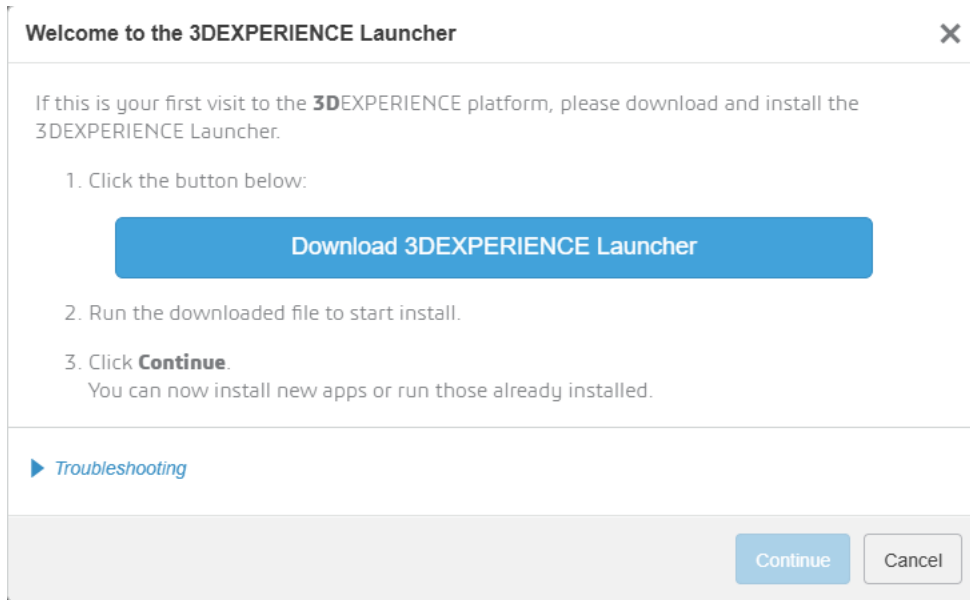
After SOLIDWORKS Design is installed, return to your 3DEXPERIENCE Platform, and navigate to the same App menu from the 3DCompass. Find and select the "Collaborative Designer for SOLIDWORKS" app to launch SOLIDWORKS Design on your PC and automatically login to your 3DEXPERIENCE Platform for use of the cloud functionality from within the SOLIDWORKS Design interface.

This is not required, but it's a good best practice to be automatically logged in upon launch. If you choose to launch SOLIDWORKS Design from your desktop shortcut, you may be prompted to login to use Cloud Services.

3DEXPERIENCE Launcher Troubleshooting Section:

If you run into problems during or after installing the 3DEXPERIENCE Launcher, it's likely due to some settings in your web browser. The common issue we encounter happens due to default settings in Google Chrome or Microsoft Edge browsers. Below is what's occurring and how to resolve it.

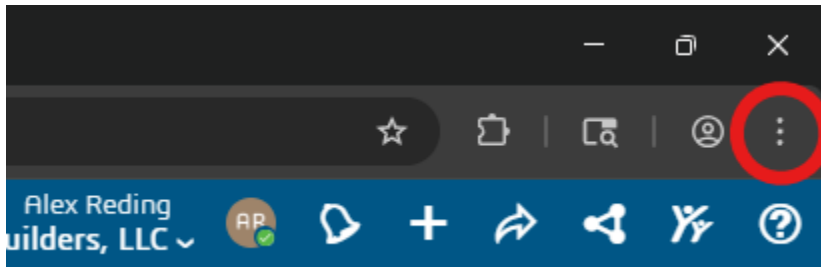
The common issue: After initially installing the 3DEXPERIENCE Launcher, you are still met with this window:



You will be prompted to download the launcher install files again, run the installer, and the cycle repeats. This is due to a default browser security setting that blocks local network access on your PC, essentially stopping the launcher from communicating with your computer and, eventually, the installed version of SOLIDWORKS Design.

How to resolve this:

- 1) In your web browser, select the menu icon in the top right corner of the screen



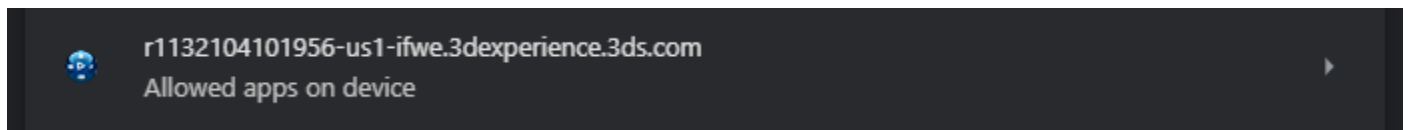
- 2) From there, scroll down in the menu and select "Settings." In Google Chrome, this should open a new tab for your browser settings interface.
- 3) In the menu on the left of the screen, find and select "Privacy & Security" or similar for other browsers.

Proceed to next page for additional steps →





- 4) In the menu in the middle of the window, select "Site Settings"
- 5) Under Recent Activity, select your 3DEXPERIENCE Platform URL from the list of recent. It should look like this:



- 6) Once selected, your screen will show a long list of permissions, but the ones we are looking for are all the way at the bottom. Scroll down to the bottom of the list to find these two settings:



- a. Make sure these two settings (Local Network & Apps on device) are both set to "Allow."

- 7) Once those settings are corrected, return to your 3DEXPERIENCE Platform tab in your web browser and refresh the web page.
- 8) Resume your installation or update attempt for SOLIDWORKS Design by selecting the application again from the 3DCompass menu. If prompted, you may need to run the 3DEXPERIENCE Launcher installation once more to make sure everything is properly in place with the new settings.

Once this is completed, you should be able to click "Continue" after the Launcher is finished to move onto installing SOLIDWORKS Design.



How to Join our Customer Community Platform:

At CADimensions, we are always looking for ways to better communicate with our SOLIDWORKS Design users. Whether it's support for technical issues & troubleshooting, helping to improve processes, teaching new tools, or just keeping you up to date on the latest features; the Customer Success Team wants to be more accessible than ever.

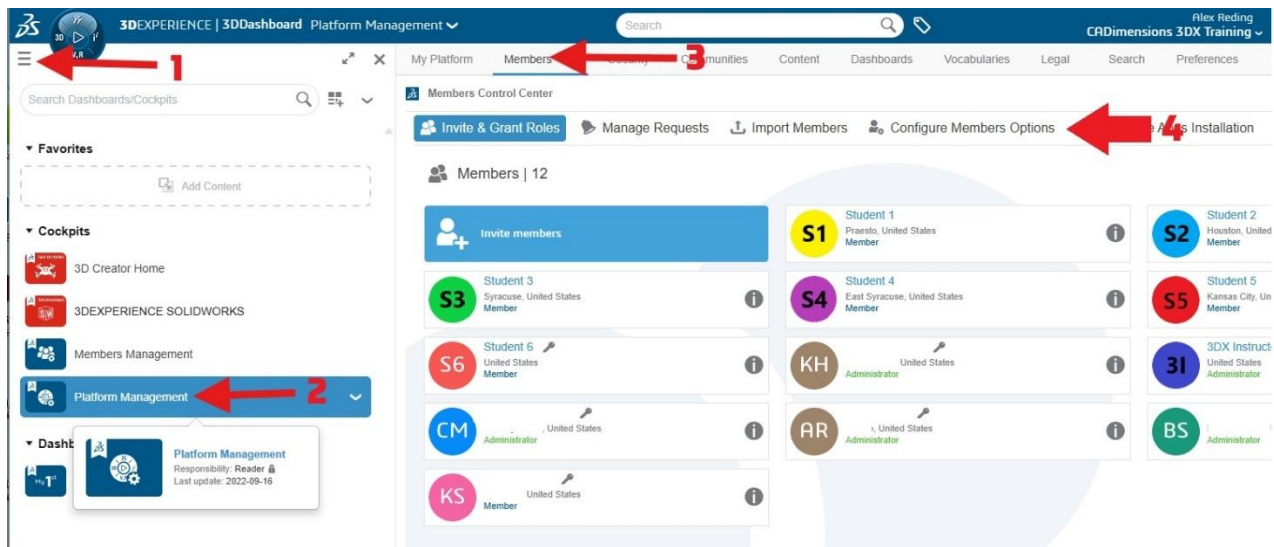
Hosted on a dedicated CADimensions Customer Platform, we have developed a custom dashboard and community chocked full of helpful, easy to access content. Our goal is simple; to help you get the most value from your purchased products, and help your team be successful in implementing them.

There are 2 simple steps to get started:

- Remove restrictions on your 3DSwymer Licenses for users who wish to join this platform.
- Contact your Account Manager or Customer Success Advocate, or fill out the invitation form with your name and the email address associated with your 3DEXPERIENCE ID.

To remove the restrictions on your 3DSwymer Licenses, your platform administrator will need to do the following:

- 1) Navigate to your Dashboard menu
- 2) Then Select the Platform Management dashboard
- 3) Go to the "Members" Tab
- 4) Then Select "Configure Member Options"

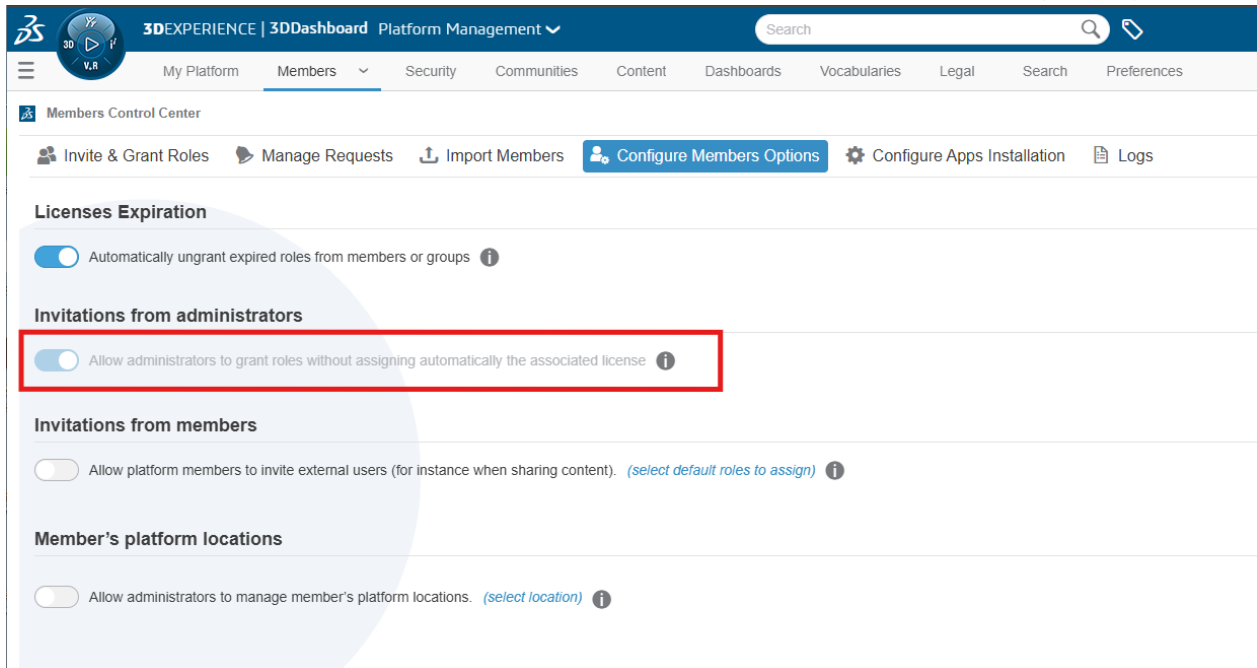


The screenshot shows the 3DEXPERIENCE Platform Management interface. The top navigation bar includes 'My Platform', 'Members', 'Communities', 'Content', 'Dashboards', 'Vocabularies', 'Legal', 'Search', and 'Preferences'. The 'Members' tab is selected. Below the navigation bar, the 'Members Control Center' is visible, with options for 'Invite & Grant Roles', 'Manage Requests', 'Import Members', 'Configure Members Options', and 'Help & Installation'. The 'Configure Members Options' option is highlighted with a red arrow. The main content area displays a list of 12 members, including 'Student 1' through 'Student 6', and several administrators. The left sidebar shows the 'Platform Management' dashboard selected under the 'Dashboards' section.

Proceed to next page for additional steps →



- 5) If not already set, make sure the option under Invitations from Administrators, “Allow administrators to grant roles without assigning automatically the associated license” is turned on (shown).



- 6) Now, navigate back to the “Invite & Grant Roles” section of the Members tab (where we started).
 7) For each user looking to join the Customer Community, select their card via the information button next to their name.
 8) Then, look at their assigned roles, and make sure the 3DSwymer role is set to not “restrict usage to this platform” by toggling it off (as shown).



- 9) Once this is done, the last step is to fill out the form (linked below) with your name and email address to be invited to the Customer Community Platform!
 a. You can also reach out to your Account Manager or Customer Success Advocate to request access.

[Form to Join CADimension’s Customer Community!](#)

