



# User Guide

*Your Company, Your CAD Standards*

## **Version 1.0**

SOLIDWORKS Add-in

Developed in Sweden

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# 1. What Is ComplianceWorks?

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ComplianceWorks is a SOLIDWORKS add-in that keeps every engineer working from the same set of company CAD standards, without anyone having to remember what those standards are. It lives in a task pane docked inside SOLIDWORKS and gives you:

- **Design Guidelines** — a checklist of company modeling/drawing rules for the document type you have open, so you know what to verify before releasing a file.
- **Quick Check** — an automated compliance scan that inspects the active document against dozens of rules and gives it a pass/fail score.
- **Utilities** — one-click tools for common cleanup and release tasks (rebuild-and-save, PDF export, dangling dimension cleanup, and more).
- **News, Resources, and Custom Macros** — company announcements, shared links/documents, and company macros, all one click away.
- **Push Messages** — mandatory pop-up notices for things everyone needs to see.

## Centrally managed

All of this content — the guidelines, the settings baseline, the news, the macros — is centrally managed by an administrator and distributed as a single database file. You never edit anything yourself; you just import the file your administrator gives you.

## 2. How It Works

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ComplianceWorks is built around one simple idea: **one admin configures it, everyone else just imports it.**

| Step             | What happens                                                                                                                                                                                                 |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Control Panel | An administrator opens the (password-protected) Control Panel and defines the company's design guidelines, SOLIDWORKS settings baseline, required custom properties, macros, resources, news, and utilities. |
| 2. Export        | The administrator saves this configuration to a single database file (.json) and puts it on a shared/network location, or emails it out.                                                                     |
| 3. Import        | Each engineer goes to Tools ► ComplianceWorks ► Import Database once and points it at that file.                                                                                                             |
| 4. Live use      | From then on, the task pane, Quick Check, and every utility all read from that same file — everyone is checking their work against the same standard.                                                        |

When the administrator updates the database and re-shares it, engineers simply re-run Import Database to pick up the changes — no reinstalling the add-in.

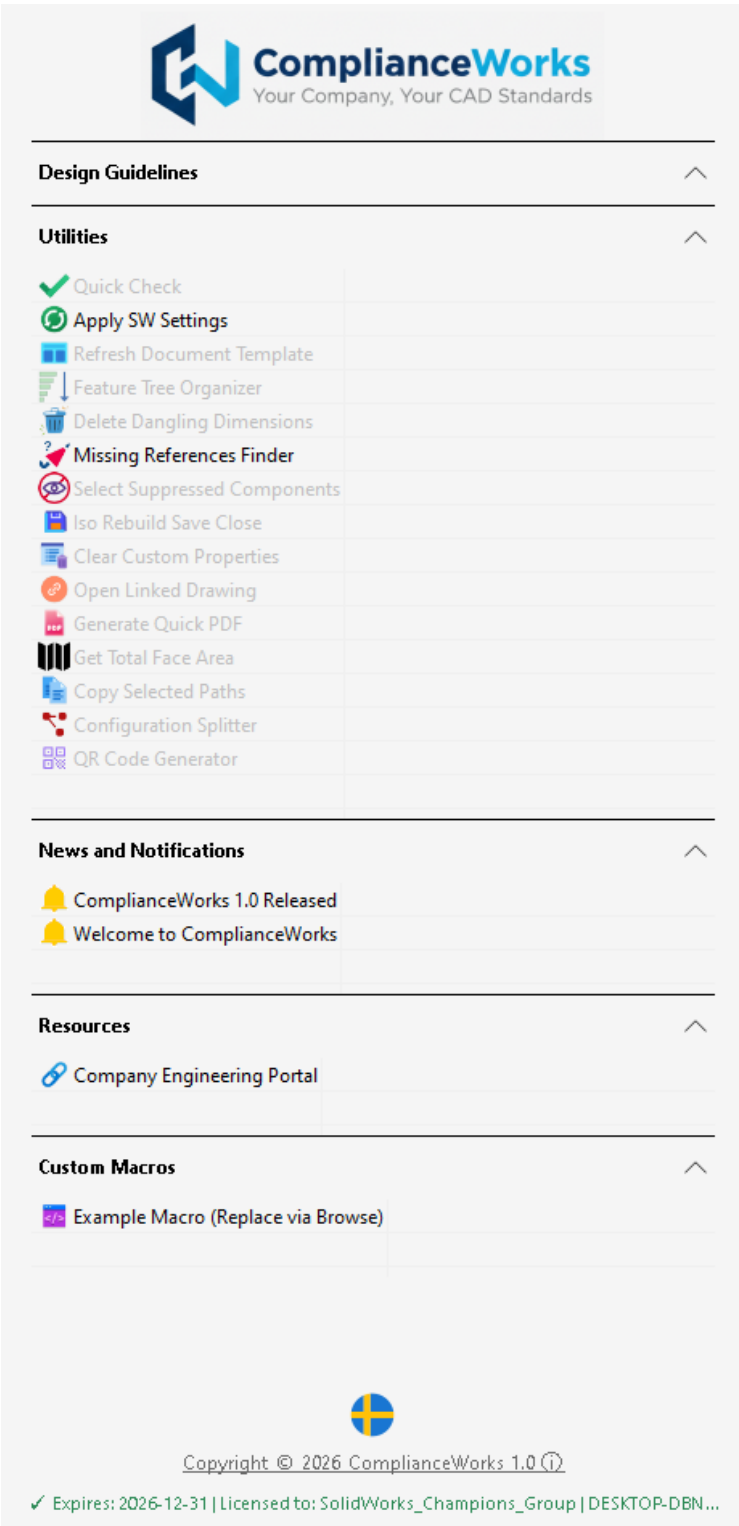
## 3. Getting Started

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1. Open SOLIDWORKS. ComplianceWorks loads automatically and docks its task pane on the right-hand side (look for the ComplianceWorks icon in the task pane tab strip).
2. If this is your first time using the add-in, go to Tools ► ComplianceWorks ► Import Database, browse to the database file your administrator gave you, and select it. You'll see a confirmation that the database was imported and set as active.
3. Open a part, assembly, or drawing. The task pane populates automatically — Design Guidelines shows only the guidelines relevant to the document type you have open (Part / Assembly / Drawing); Utilities, News, Resources, and Custom Macros are always available.
4. That's it — you're set up. The database path is remembered, so this only needs to be done once per machine (or again later if your administrator issues an updated database).

# 4. The Task Pane

The task pane is organized into five sections. Each section header has an up/down arrow button so you can collapse sections you don't need and give more room to the ones you do.



The ComplianceWorks task pane, docked in SOLIDWORKS

## 4.1 Design Guidelines

A checklist of the company's modeling and drawing rules that apply to the type of document you currently have open. Guidelines are automatically filtered — a Part-only guideline won't show up while you're working in a Drawing, and vice versa.

- Check off each guideline once you've verified your model/drawing follows it. Your checked/unchecked state is remembered.
- Click a guideline to open its full detail — a description and any rich-text guidance the administrator has written, alongside its severity.
- Each guideline has one of three severity levels, matching the colour of its entry:

| Severity | Meaning                                                            | Colour |
|----------|--------------------------------------------------------------------|--------|
| Critical | Must be resolved — a stop-ship issue if left unchecked.            | Red    |
| Major    | Should be resolved — a real standards violation if left unchecked. | Orange |
| Minor    | Best-practice — worth doing, lower risk if skipped.                | Green  |

Leaving guidelines unchecked also affects your Quick Check score (see Section 5) — Quick Check reports any unchecked guideline for the current document type as part of its compliance scan.

## 4.2 Utilities

One-click tools that run directly against your active document (or, for a couple of them, against a folder you choose). Click any utility to run it immediately — there's no confirmation step for most of them, so make sure the right document is active first. Utilities that don't apply to the current document type (for example, a Part-only tool while a Drawing is open) are greyed out and can't be clicked.

See Appendix B for the full list and what each one does. Your administrator can also choose to hide utilities your company doesn't use — if a tool you expect isn't listed, ask your administrator whether it's been disabled.

## 4.3 News & Notifications

Company announcements pushed out by your administrator. Click an item to open it and read the full notice.

## 4.4 Resources

Quick links to shared documents, folders, or web pages your administrator has set up (for example, a link to the company standards handbook, a network drive, or an internal wiki page). Click a resource to open it — links open in your browser, and file paths open in whatever application is associated with that file type.

## 4.5 Custom Macros

Company-authored SOLIDWORKS macros, ready to run with one click — no need to know where the macro file lives or which procedure to call. Click a macro to run it immediately against the active document.

## 5. Running Quick Check

Quick Check is ComplianceWorks' automated compliance scan. It inspects the active document against a large set of rules — some universal, some specific to Parts, Assemblies, or Drawings — and gives you a score and a release verdict.

### How to run it

5. Open the document you want to check.
6. Click Quick Check in the task pane's Utilities section (or use the Refresh button inside the Quick Check window if it's already open).
7. Quick Check runs through each applicable category and populates a results grid, grouped by category.
8. Review the results, fix anything flagged, and click Refresh to re-check.

Quick Check only reads your document — it never changes it, so it's always safe to run as many times as you like. Running it twice in a row against an unchanged document always gives the same result.

### Understanding the results

Each row shows an item name, its value/detail, and a status:

| Status shown      | What it means                                                                                              |
|-------------------|------------------------------------------------------------------------------------------------------------|
| Pass              | Compliant — nothing to do.                                                                                 |
| Critical          | Stop-ship issue. Automatically fails the whole document regardless of score.                               |
| Major             | A real compliance violation — counts heavily against your score.                                           |
| Minor             | A lower-severity issue or best-practice miss — counts lightly against your score.                          |
| — (informational) | For your awareness only; doesn't affect the score (for example, a reminder to manually confirm something). |

### Your score and verdict

Quick Check produces a score from 0–100 and a verdict. The score starts at 100, and each flagged item deducts points based on its severity: Critical –4, Major –2, Minor –0.5 or –1 (some Minor checks weigh a little more than others). Each passing check also adds credit toward the total, so a well-covered document is more resilient to a single flagged item. A document with nothing flagged and nothing passed yet scores 100 by default.

| Verdict  | Condition                                 | Meaning                                             |
|----------|-------------------------------------------|-----------------------------------------------------|
| APPROVED | Score $\geq$ 90, and no Critical findings | Good to go.                                         |
| REVIEW   | Score 70–89, and no Critical findings     | Usable, but check the flagged items before release. |



| Verdict  | Condition                                       | Meaning                                     |
|----------|-------------------------------------------------|---------------------------------------------|
| REJECTED | Score below 70, or any Critical finding present | Fix the issues and re-run before releasing. |

**Note**

A single Critical finding always results in REJECTED, no matter how high the rest of the score is — some issues (like a broken reference or a rebuild error) are considered too risky to release regardless of everything else being clean.

## Exporting a report

Click **Export** to save your results as either an **HTML report** (opens automatically after saving — good for sharing or attaching to an email), or a **CSV file** (good for logging results or importing into a spreadsheet/tracker).

See Appendix A for the full list of what Quick Check inspects.

## 6. Push Messages

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Push Messages are announcements your administrator marks as important enough to interrupt your workflow — they appear automatically as a pop-up the next time you start SOLIDWORKS after one is published, rather than waiting for you to notice them in the News list.

Each pop-up has a “don't show again” option. Leave it unchecked if you want to see the message again next time (for example, if you just want to dismiss it for now), or check it once you've read and don't need the reminder again.

## 7. The SOLIDWORKS Menu

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ComplianceWorks adds a ComplianceWorks menu (under Tools) with four commands:

| Command                      | Who can use it                      | What it does                                                                                                                                                                  |
|------------------------------|-------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Control Panel                | Administrators (password-protected) | Opens the full configuration tool described in Section 8.                                                                                                                     |
| Import Database              | Everyone                            | Lets you browse to and import/switch to a .json database file — no password required. This is how every engineer connects to (or updates to) the company's current standards. |
| Refresh Connection           | Everyone                            | Retries the license server connection without restarting SOLIDWORKS — useful if the connection failed when SOLIDWORKS opened (see Section 9).                                 |
| Clean Cache                  | Everyone                            | Cleans the dismissed messages, so the dismissed push messages may appear again.                                                                                               |
| About ComplianceWorks Add-in | Everyone                            | Shows version information and a summary of the add-in's architecture and features.                                                                                            |

## 8. Administrator Guide: The Control Panel

### For administrators

This section is for administrators who maintain the company's ComplianceWorks database. Everyday users of the add-in don't need the Control Panel — they only need Import Database (see Section 7).

Open it via Tools ► ComplianceWorks ► Control Panel. You'll be prompted for the admin password (the title bar shows a remaining-attempts counter after a failed attempt).

### Company identity

At the top of the Control Panel you set the Company Name, License Key, and the admin password itself. These travel with the database file, so anyone who imports it is validated against your company's license automatically.

### The seven tabs

| Tab                    | What you configure there                                                                                                                                                                               |
|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Design Guidelines      | The checklist rules shown in the task pane. Each guideline has an ID, title, description, rich-text detail, a document-type filter (Part/Assembly/Drawing), and a severity: Critical, Major, or Minor. |
| Utilities              | Which of the built-in utilities (see Appendix B) are visible to engineers. Quick Check is always shown and can't be hidden.                                                                            |
| News and Notifications | Company announcements shown in the task pane's News section.                                                                                                                                           |
| Push Messages          | Announcements that pop up automatically on startup (see Section 6).                                                                                                                                    |
| Resources              | Shared links and file paths shown in the task pane's Resources section.                                                                                                                                |
| Custom Macros          | Company macros, including the file path and the module/procedure to call, shown in the task pane's Custom Macros section.                                                                              |
| SolidWorks Settings    | The compliance baseline used by Quick Check's SW Settings Compliance category — see below.                                                                                                             |

### SolidWorks Settings tab, in detail

This tab captures a snapshot of your SOLIDWORKS installation's settings to use as the company baseline. Three independent checkboxes control what gets captured:

- **Include System Options** — captures your current SOLIDWORKS system options (units, colours, display settings, and so on) as the baseline every engineer's Quick Check will be compared against.
- **Include File Locations** — captures your configured File Locations paths (templates, libraries, etc.) as the baseline, so Quick Check can flag engineers whose paths have drifted from the standard.

- **Include Required Custom Properties** — reads your Part/Assembly/Drawing templates and captures which custom properties are required at the document level and the configuration level. This is what powers Quick Check's Custom Properties category. Unlike System Options and File Locations (applied via Apply SW Settings), captured custom properties are applied to documents via Refresh Document Template.

## Saving, importing, and exporting

- **Save** writes your changes back into the in-memory database you're editing.
- **Import Database** loads an existing .json database file into the Control Panel for editing (for example, to update a database you built previously, or to take over from another administrator).
- **Export Database** writes the current database out to a .json file — this is the file you distribute to your engineers via Import Database (see Section 7).

Changing the Company Name or License Key re-validates the license when you save. Changing content only (guidelines, news, macros, settings, etc.) re-applies immediately without a re-validation step.

## 9. Licensing

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ComplianceWorks validates your company's license key whenever a database is loaded or imported. If validation fails (or hasn't completed yet), the task pane's content sections won't populate until it succeeds. If your database is read-only or something appears misconfigured, contact your administrator — company name, license key, and the admin password are all managed from the Control Panel (see Section 8).

Validation happens over the network at SOLIDWORKS startup, so a slow or temporarily unavailable connection can cause it to fail before the task pane populates. If this happens, use Tools ► **ComplianceWorks** ► **Refresh Connection** to retry the license check without restarting SOLIDWORKS. If it still fails, check your network connection or contact your administrator.

## 10. Troubleshooting & FAQ

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### **The task pane is empty / nothing shows up.**

Make sure you've imported a database at least once via Tools ► ComplianceWorks ► Import Database, and that license validation has had a moment to complete (it makes a brief network check).

### **The connection to the license server failed when SOLIDWORKS opened.**

Use Tools ► ComplianceWorks ► Refresh Connection to retry the license check without restarting SOLIDWORKS. This is the quickest fix if the task pane loaded before your network connection was ready. If it keeps failing, check your network connection or contact your administrator.

### **Design Guidelines don't show anything for my document.**

Guidelines are filtered by document type — check that any guidelines exist for the type of document you have open (Part/Assembly/Drawing), and that you actually have a document open and active.

### **A utility is greyed out.**

Most utilities only apply to a specific document type (for example, drawing-only tools stay greyed out while a part is active), or no document is open at all. Clicking a greyed-out utility shows a message telling you exactly what it requires. Open the right kind of document and it will become clickable. If it's still greyed out, your administrator may have hidden it from the Utilities tab.

### **I imported a new database but the task pane still looks out of date.**

Design Guidelines and Quick Check both refresh automatically once import finishes and license validation completes — this can take a few seconds. If something still looks stale, switching to another open document and back (or simply reopening the document) forces a refresh.

### **Quick Check flagged something I don't understand.**

Every row includes a short explanation in its detail text. For SW Settings Compliance and Custom Properties results specifically, the flagged item reflects your administrator's saved baseline — check with them if you believe the baseline itself is wrong.

### **I forgot the Control Panel admin password.**

Only your administrator can reset this — it's stored in the database itself and isn't recoverable from within the add-in.

## Appendix A: Quick Check Category Reference

### Runs on every document type

| Category                  | What it checks                                                                                                       |
|---------------------------|----------------------------------------------------------------------------------------------------------------------|
| File & Save State         | Document type, SOLIDWORKS version, save status, file name/size, last modified date, unsaved changes, read-only flag. |
| Document Language & Units | SOLIDWORKS display language, unit system, linear/angular unit overrides, and drafting standard.                      |
| Custom Properties         | Document-level and configuration-level custom properties required by the admin's template baseline.                  |
| SW Settings Compliance    | Your live File Locations and System Options compared against the admin's saved baseline.                             |
| Design Guidelines         | Any admin-defined guideline for this document type that's still unchecked.                                           |

### Parts only

| Category             | What it checks                                                                                                |
|----------------------|---------------------------------------------------------------------------------------------------------------|
| Model Integrity      | Whether the model needs a rebuild, and any rebuild/equation errors.                                           |
| Sketch Quality       | Under-defined and over-defined sketches.                                                                      |
| Feature Tree Health  | Rebuild errors surfaced anywhere in the feature tree.                                                         |
| Material & Mass      | Material assignment, a density sanity check, and mass/volume/bounding box.                                    |
| Hole Standards       | Hole Wizard usage, non-standard drill sizes, and thread standard consistency.                                 |
| Configuration Health | Cached rebuild state for each configuration (read-only — never activates or rebuilds a configuration itself). |

### Assemblies only

| Category             | What it checks                                                              |
|----------------------|-----------------------------------------------------------------------------|
| Mate Integrity       | Total mate count, mate errors, and redundant mates.                         |
| Component References | Broken file references and accidentally suppressed components.              |
| Assembly Structure   | Floating, virtual, and lightweight components.                              |
| Image Quality        | Shaded image quality display setting.                                       |
| External References  | Broken or out-of-date external (in-context) references.                     |
| Component Materials  | Material assignment and density across all part components in the assembly. |



| Category             | What it checks                                                                     |
|----------------------|------------------------------------------------------------------------------------|
| Configuration Health | Same non-destructive check as for Parts, run across the assembly's configurations. |

## Drawings only

| Category          | What it checks                                                                    |
|-------------------|-----------------------------------------------------------------------------------|
| Annotation Health | Dangling annotations.                                                             |
| View Integrity    | Drawing views that are out of date relative to the model.                         |
| BOM Accuracy      | Bill of materials rows vs. the model, part numbers, descriptions, and quantities. |
| Drawing Standards | Sheet format/template location and version, and dimension overrides.              |
| Layer Compliance  | Dimensions and notes assigned to the correct layers.                              |

## Appendix B: Utilities Reference

| Utility                      | What it does                                                                                                                                                        | Requires                 |
|------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|
| Quick Check                  | Runs the full compliance scan described in Section 5.                                                                                                               | Any document             |
| Apply SW Settings            | Applies the administrator's standard SOLIDWORKS system options to your installation.                                                                                | —                        |
| Refresh Document Template    | Synchronises the active document's custom properties with the master template.                                                                                      | Any document             |
| Feature Tree Organizer       | Renames and standardises feature names according to company naming conventions.                                                                                     | Part or Assembly         |
| Delete Dangling Dimensions   | Deletes all dangling dimensions and annotations from every sheet in the active drawing.                                                                             | Drawing                  |
| Missing References Finder    | Scans a folder you choose for SOLIDWORKS files and reports any missing external references.                                                                         | None (works on a folder) |
| Select Suppressed Components | Selects all suppressed top-level components in the active assembly.                                                                                                 | Assembly                 |
| Iso Rebuild Save Close       | Sets an isometric view, rebuilds, saves, and closes the active part or assembly.                                                                                    | Part or Assembly         |
| Clear Custom Properties      | Deletes all document-level and configuration-level custom properties and saves.                                                                                     | Any document             |
| Open Linked Drawing          | Finds and opens the drawing file(s) associated with the active part or assembly.                                                                                    | Part or Assembly         |
| Generate Quick PDF           | Exports the active drawing as a PDF to the same folder, using the same file name.                                                                                   | Drawing                  |
| Get Total Face Area          | Calculates and displays the total surface area of all solid bodies in the active part.                                                                              | Part                     |
| Copy Selected Paths          | Copies the file path of the active document (or selected components in an assembly) to the clipboard.                                                               | Any document             |
| Configuration Splitter       | Splits each configuration of the active part into its own .sldprt file, saved to a folder you choose.                                                               | Part                     |
| QR Code Generator            | Generates a QR code from information you choose (file name, path, or custom properties) and inserts it onto the active drawing sheet, or saves it as an image file. | Any document             |

Your administrator can hide any of these except Quick Check from the Utilities tab in the Control Panel — if one you need isn't visible, ask them to enable it.