

EForce 26.12 documentation

Milbitt Software



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EEforce 26.12 documentation

Keep your PCB designs, their history, and your team's reviews together. Choose a starting point below, or [read the introduction](#) for an overview.

EEforce 26.12 showing a PCB layout beside its projects and version history

Start with your task

I want to...	Start here
Set up the desktop app	Install EEforce , then sign in
Review a board without installing anything	Open EEforce 365
Find my way around the app	Take the window tour
See what changed	Compare versions or boards
Discuss a design with my team	Comments, areas, and sketches
Edit a board and save a version	Check out and check in
Set up or administer a server	Server installation and web administration
Free up server space, or restore something deleted	Storage Assistant

Watch a design review

A short recording from the desktop app: zoom into the vector layout, inspect a net, open a pinned comment with its sketch, and browse the team's review. The final views show cross-probe and 3D.

Watch the design review walkthrough

To try it yourself, start with [Previewing Designs](#) and [Reviewing Designs Together](#). The recording uses a test project; the screenshots elsewhere in this guide use the fictional Kestrel Dynamics dataset.

Upgrading to 26.12?

The new desktop client, EEforce 365, and the EEforce Companion bring design review into more of your workflow. Administration now lives in the browser.

[See what's new and what to check before upgrading](#) →

Need a hand?

Browse the [frequently asked questions](#), check [access and roles](#), or troubleshoot your [connection](#).

Showing EEforce to someone?

The [customer demo walkthrough](#) is a presenter's script for the [demo deck](#) — storyline, talking points, real screens and the questions customers ask — that can be read straight through or used live.

Welcome to EEforce

EEforce brings **high-fidelity vector previews** and **design collaboration** to your PCB workflow. Inspect layouts and schematics in detail, compare revisions, and discuss the exact spot you mean with comments and sketches — in the desktop app or in your browser with **EEforce 365**.

Your designs and their version history stay together on your company's server.

The EEforce app

It is built for **Siemens Xpedition** and **PADS Professional**. When you check a board in, EEforce saves it as a new version, records who changed what, and makes sure two people never overwrite each other's work.

info About the pictures in this guide The screenshots show a fictional company, **Kestrel Dynamics**, which designs RF front ends and signal processors. You will meet the same people, projects and boards throughout the guide — for example Sanne de Vries, a PCB layout engineer, working on the **SP-12 Main Board**.

Get started

Your task	Your next steps
Edit designs	Install the app , sign in , then check out a design .
Review designs	Open EEforce 365 with your usual account, or use the desktop viewer .
Manage the server	Start with server installation , then web administration .
Upgrade an existing installation	Read what changed in 26.12 .

What EEforce does for you

- **One home for every design.** Your boards live on a central server your company runs, not on personal drives.
- **A traceable version history.** Each check-in saves a new version. You can go back to any earlier one, and compare two versions to see what changed.
- **See a board without opening a design tool.** The built-in viewer shows the layout, schematic, cross-probe, bills of materials, layer stack-up and a 3D model, in seconds.
- **Review together.** Pin comments and sketches straight onto the board. New comments and replies show up for everyone as soon as they are posted, even inside Xpedition and PADS Professional.
- **Stay in your design tool.** The **EEforce Companion** on the editor's title bar saves new versions and shows the team's comments without leaving the tool. See [Working in Xpedition & PADS Professional](#).
- **Review from a browser.** With **EEforce 365**, colleagues can look at designs, compare versions and comment from a web browser — nothing to install, and no licence seat needed. Project Managers can also decide there who has access.
- **No accidental overwrites.** Only one person edits a design at a time. Everyone else can still view it.
- **Your files are always retrievable.** Open or download any file from any version — see [Browsing & Downloading Files](#).

How it fits together

EEforce has three parts. Most people install only the first one, and some don't install anything at all.

How EEforce fits together

Part	What it is
The EEforce app	The program you install on your Windows PC. You browse, preview, compare and comment here, and check designs out and in. Most of this guide happens in the app.
EEforce 365	The EEforce viewer in your web browser. Open your server's address followed by /365 and sign in with your usual EEforce account. See Reviewing in the Browser .

Part	What it is
The EEforce server	A central computer your IT team sets up once. It stores every design and version, and decides who can see and change what. You never have to manage it — you just connect to it.



If your company has already set up the server, all you need is the app and your sign-in details. Go to [Installing EEforce](#) and then [Signing In](#).

Only want to look at a design? Open EEforce 365 in your browser instead.

The three things to know

Everything in EEforce is built from three simple ideas.

Projects hold related work — usually one product. A project holds one or more designs, and you can group them into folders. At Kestrel Dynamics, the **OTX-400 Spectrum Analyzer** project holds the analyzer's analog front end, its display module and a generic container of specifications.

Designs (also called *containers*) are the things you version: a board from Xpediton or PADS Professional, or a **Generic Container** of other files such as datasheets, specifications and BOM drafts. Each design is treated as one complete object.

Versions are the saved history of a design. Every check-in adds a new version on top. The first version is **v0**, the next **v1**, and so on.

A design and its versions

What you can do in a project depends on your **role** there: a **Viewer** can look and comment, a **Contributor** can also check designs out and in, and a **Manager** has full control. See [Access & Roles](#).

What's new in 26.12

Version 26.12 is the biggest EEforce release so far:

- **High-fidelity vector previews** of layouts and schematics, with cross-probe, measuring and net highlighting, plus a **PCB specification** and an **Assembly Assistant** on the 3D board
- **Comments and sketches** on the design, with live conversations across the team
- A **redesigned desktop app** that brings projects, versions, and review together
- **Compare** two versions of a board, or two different boards

- The **EEforce Companion** in Xpedition and PADS Professional: save versions and review comments inside the design tool
- **EEforce 365** — review designs in a web browser, with no licence seat
- A new **web administration** for users, groups, projects, licences, storage and the audit trail, with a **Storage Assistant** that shows where the space goes, prunes old versions in bulk and restores from the trash
- Designs stay readable and downloadable even if the server licence expires

See [What's New in 26.12](#) for the full list.

Where to go next

- [Installing EEforce](#) — get the app onto your PC
- [Signing In](#) — connect to your company's server
- [A Tour of the Window](#) — find your way around
- [Previewing Designs](#) — the built-in viewer

What's New in 26.12

EEforce 26.12 puts **high-fidelity vector previews** and **collaboration on the design** at the centre of the review. Inspect the details, pin a comment or sketch to the board, and work through the conversation with your team in context.

A **redesigned desktop app** brings the workflow together, and **EEforce 365** brings the same viewer and conversations to your web browser.

If you are upgrading from 26.9 or earlier, read [Before you upgrade](#) first.

High-fidelity vector previews

The new viewer renders **layouts and schematics as high-fidelity vector previews**, keeping design detail clear as you zoom in. Highlight a net or component and cross-probe between schematic and layout, without opening a design tool.

PCB and schematic BOMs, the board's specification and **3D** also open in the same viewer. The 3D view shows component placement, the board outline and the stack-up without any external viewer installed. See [Previewing Designs](#).

- **Click to select, no modes.** A click picks what is under the pointer — a net, a component, a pour — and a further click on the same spot takes the next thing there. Hovering shows what a click would pick. Selecting a net of a differential pair highlights both.
- **Properties of the selection** in a panel of their own: a component's value, part, footprint, placement and pins; a net's class, connections and the copper it is made of.
- **Measure** point to point on the board, snapping to pads, vias and track ends, in mm and mil.
- **PCB specification.** The **PCB Spec** view replaces the plain stack-up: board facts, the stack-up drawn to scale with the layers each via joins, via types, the drill table, routing per layer, differential pairs, power and ground, and net classes, with estimated impedances. It switches between mm and mil and prints as a specification sheet.
- **BOMs** group parts by any column, and set apart the parts nobody buys or places (test points, fiducials, mounting holes and the like) in a **Not on the BOM** section that stays out of the CSV.
- **Assembly variants.** Choose a variant, and every view shows what it fits: crossed out on the schematic, greyed on the board, hidden on the 3D board, set apart in the BOMs.
- **Components on the 3D board** show as their 3D models, as placement outlines raised to their height, or not at all.
- **Cross-probe on two screens.** Either view of the cross-probe page can open in a window of its own and stays cross-probed.

The redesigned desktop client with linked schematic and layout views

Assembly Assistant

The **Assembly Assistant** puts the BOM beside the 3D board, for hand assembly and first-article inspection: pick a line and the board turns to its side and zooms to its parts, with everything else greyed out. Group by part number, choose the side and the variant, and step through with the keyboard. **Assembly sessions** keep track of what has been placed — done or skipped, part by part — on the server, so a board can be built over several days, from any computer, with the whole team seeing the progress. See [The Assembly Assistant](#).

Review designs together

Pin a comment on the layout, schematic or 3D model, or on a part in a BOM; call out an area, add a sketch, and discuss it in a thread right on the board. Replies can carry their own sketches and areas. Comments belong to the design, and a comment made on another version says so. They can be filtered and resolved, and appear for everyone as soon as they are posted. Anyone who can view a project can comment and reply, including Viewers; resolving needs the Contributor role. See [Reviewing Designs Together](#).

The viewer also tells you when a newer version has been checked in while you're looking at an older one (with **Go to latest**), and when someone has the design checked out.

Redesigned desktop app

The EEforce app has been rebuilt on a modern user interface. The window layout, icons and toolbar are new, and the project list shows the state of every design at a glance. See [A Tour of the Window](#).

- **Organise projects with folders.** Group a project's designs into folders, and move folders and designs around by drag and drop. **Single project mode** lets you focus on one project at a time. See [Working with Projects](#).
- **Browse files without checking out.** The **Files** view lists every file in any version, and opens or downloads a single file on request.
- **See your local work.** For a design you have checked out, the **Work Files** view shows the files on your PC and where they live on disk.
- **Editor launch feedback.** EEforce notices when your design tool starts and tells you what's happening. The **Active editors** list in the status bar shows every editor it opened, and **Finish Editing** opens by itself when you close an editor on a checked-out design.
- **Checkouts on another computer.** A design you checked out on another computer shows as **Checked out by you on** that computer, and you can release it from here if you no longer need those changes.
- **Copy / Move.** One dialog copies a design — its latest version, a chosen version or its full history — into this project or another one, or moves it to another project or folder. It shows where the design will end up before you confirm. See [Copying or moving a design](#).
- **Generic Containers.** The design kind for any collection of files, formerly called *Folder*, is now the **Generic Container**, and a new one can start from a **Blank container**.
- **Check-outs and check-ins step by step.** The status bar shows each step an operation goes through, and the Activity Log keeps one entry per operation with every step's size, time and outcome. See [Following a check-out or check-in](#).
- The app remembers the project, design and version you were working on.

EEforce 365: design review in the browser

The EEforce viewer is now also available as a web application at your server's address followed by /365. Reviewers who don't have EEforce installed can:

- browse projects as tiles or a table, sorted by name or date, and search projects, folders and boards — with a picture of each board

- open any version of a board in the full viewer — layout, schematic, cross-probe, BOMs, stack-up and 3D — and follow the version history, branches included
- compare versions, or compare with a board from another project
- read, add and reply to comments

A project's Managers can also **manage its access** there: add people and groups, change their roles and remove them, without the desktop app. Every page **updates live** — a check-in, a check-out or an access change, made anywhere, shows up without reloading. See [Managing Access](#).

EEforce 365 needs no licence seat. Access follows the project roles, exactly as in the app. Signing in to EEforce 365 doesn't end your session in the desktop app. See [Reviewing in the Browser](#).

EEforce 365 showing a board in the browser's 3D viewer

Compare versions and boards

Compare shows what changed between two versions of a board, with a legend for what exists only in one version and what overlaps. You can also compare a board's layout with another board, even one from a different project: the **Compare Assistant** lines the two boards up by a pair of points you pick, and matches their copper layers. Comparing works in the app and in EEforce 365. See [Comparing Designs](#).

The EEforce Companion in Xpedition and PADS Professional

Every editor EEforce opens now carries the **EEforce Companion**, a small toolbar on the editor's title bar. It replaces the EEforce menu entries and editor scripts of earlier versions, so nothing has to be installed in the design tools. See [Working in Xpedition & PADS Professional](#).

- **Save & Check In** saves the design and checks it in as a new version while the editor stays open.
- **Comments in the editor.** Show the team's comments as markers on the board or schematic sheet, open a conversation, reply, resolve, and add new comments with areas and sketches, without leaving the tool. Showing a comment takes the editor to the comment's layers and zoom, or its sheet.
- **Previews always match your last save.** Every save of a layout refreshes the data EEforce uses for its layout preview and **Compare**.
- **3D model on close.** When you close Layout on a checked-out design, EEforce offers to export the board's 3D model for the **3D** view first.

New web administration

Server administration is now a web application at your server's address followed by `/admin`. It replaces the administration windows in the desktop app — the app's **Administration** menu now simply opens it. Besides users, groups, projects, logs, LDAP and SSO, it adds:

- **Storage** — the **Storage Assistant**: how much space each project, design and version takes, pruning versions in bulk, and the trash, where deleted, pruned and moved items can be restored or deleted for good (see [Storage Assistant](#))
- **License** — seats in use (with a **Drop** button to free a seat), the licence file details, and uploading a new licence file
- **Audit Trail** — a searchable, exportable record of who did what
- **Settings** → **General** — turn automatic client updates on or off
- **Settings** → **Storage** — choose where designs are stored (see below)
- **Settings** → **Provisioning (SCIM)** — let your identity provider create and deactivate EEforce users

See [Web Admin Interface](#).

Cloud and network storage

The design store can now live in **S3-compatible object storage** or **Azure Blob Storage** instead of a local disk. Storage credentials and other sensitive server settings are encrypted where they are stored.

Read-only mode when the server licence expires

Your designs stay available even when a licence lapses. If the server licence expires, EEforce switches to **read-only mode**: everyone can still sign in, browse projects, preview designs and download files, but nothing can be checked out, checked in or changed. Administration keeps working, so a new licence can be uploaded — and it takes effect immediately. See [Licensing](#).

Sign-in and sessions

- **One session per person.** Each account can be signed in to the desktop app on one computer at a time. Signing in on a second computer asks whether to switch there; the earlier session then ends. See [Signing In](#).
- **Sessions stay alive.** Your sign-in is refreshed quietly in the background. If a session does end, EEforce tells you why instead of failing silently.

- **Standards-based single sign-on.** SSO is set up with just your identity provider's address (OpenID Connect discovery) and uses today's recommended sign-in flow. The desktop app signs in through an embedded sign-in window or your web browser — the administrator chooses which — and signing out also ends your session at the identity provider. See [Single Sign-On \(SSO\)](#).
- **Live updates through firewalls.** The server now sends live updates with Server-Sent Events instead of SignalR, which works better through corporate proxies and firewalls.

Installation and updates

- **The client installer comes from your server.** Download it from the server's start page (**Download Client Software**), and it arrives with your server's address already filled in. The installer asks for the address, checks for free disk space before it starts, and installs the .NET Desktop Runtime and WebView2 when they're missing — even without internet access. See [Installing EEforce](#).
- **Automatic client updates are a server setting.** An administrator turns them on or off in the web administration (**Settings** → **General** → **Enable client auto-update**). When they are off and a newer app is required, the app says so instead of starting. See [Updating EEforce](#).
- **The server installer sets up HTTPS.** A new **Network** page picks the ports and the certificate: a self-signed certificate, your own certificate, or no certificate at all (for testing only). The installer also sets the folder permissions for you, and its last page shows the server address to hand out to users. See [Setting Up the Server](#).
- **Faster server start.** The server is now published as a native program, which starts faster and no longer needs a separate .NET runtime installed.

Fixes

A large number of corrections across the desktop app, chiefly around checking in and out multi-board projects, guarding locked versions against editing, and checking names when you move, rename or clone items.

Before you upgrade

- **Renamed and regrouped design actions.** *Folder containers* are now called **Generic Containers**. **Copy / Move...** on the design and version menus replaces **Clone** and **Move/Copy to Another Project**, and also starts a new design from any version; **Rename** and **Delete** are under **Manage**.

- **Administration has moved to the browser.** Administrators no longer manage users, groups, LDAP or SSO from the desktop app. Use the web administration at [/admin](#), signed in with the server's administrator password.
- **Check your SSO settings.** SSO now starts from the identity provider's **Authority / Issuer URL**. The separate authorization and token addresses are discovered automatically. Review the settings after the upgrade — see [Single Sign-On \(SSO\)](#).
- **Scheduled LDAP group sync**, introduced in 26.9, is included. Groups are synced on a schedule rather than at every sign-in — see [LDAP / Active Directory](#).

Installing EEforce

Getting the EEforce app onto your Windows PC takes a couple of minutes, and you only do it once. What happens on later versions is described in [Updating EEforce](#).

⋮ tip Only want to look at designs? You don't need to install anything to view a design, compare versions or comment. Use **EEforce 365** in your web browser instead — see [Reviewing in the Browser](#).
⋮

Before you start

You need	Details
Windows 10 or 11 (64-bit)	EEforce runs on Windows.
Permission to install software	You (or your IT team) need administrator rights for the install itself.
Free disk space	For the app, plus working copies of the designs you check out. The installer checks the space before it starts.
Your server address and sign-in	Ask whoever manages EEforce at your company. The server address looks like http://eeforce.kestrel.local , or starts with https:// when your server uses a certificate.

::: info Who sets up the server? The central EEforce server is installed once by your IT team — you don't need to. If that's not done yet, see [Setting Up the Server](#). As a user, you only install the app below. :::

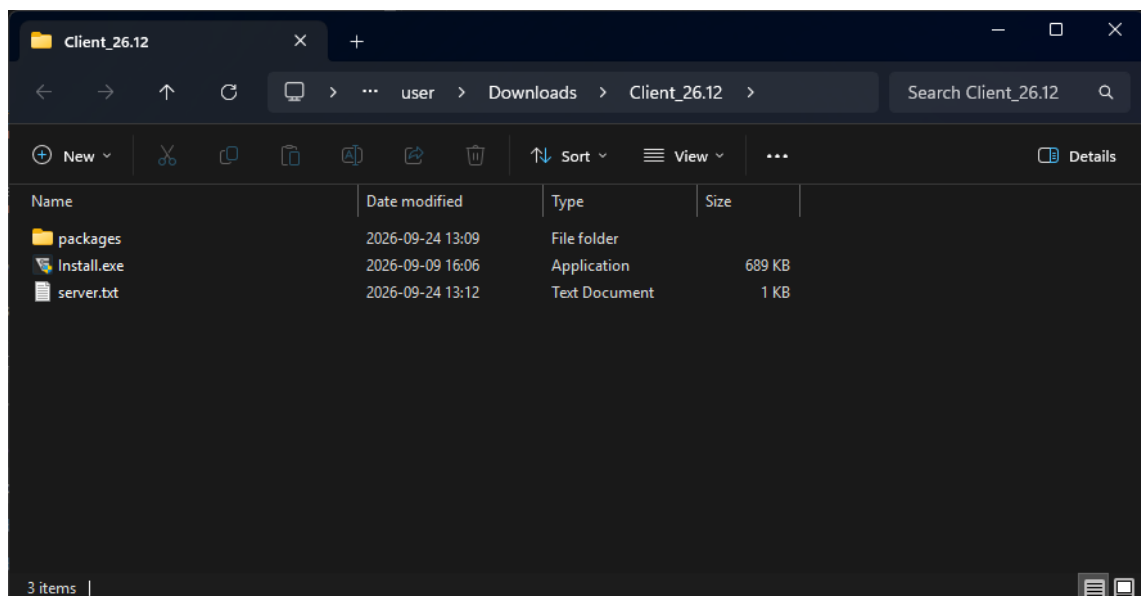
Step 1 — Get the installer

Download it straight from your server when you can: that way the installer already knows the server's address.

1. Open your server address in a web browser, for example <http://eeforce.kestrel.local>.
2. Click **Download Client Software**.

```
EEforce Server v:26.7.9762.43162
Open Admin Panel | Download Client Software
EEforce 365 Portal
=====
EEforce server is running properly
Licensing Status: Good
Vault Status: Good
Active Sessions:
2 active sessions
```

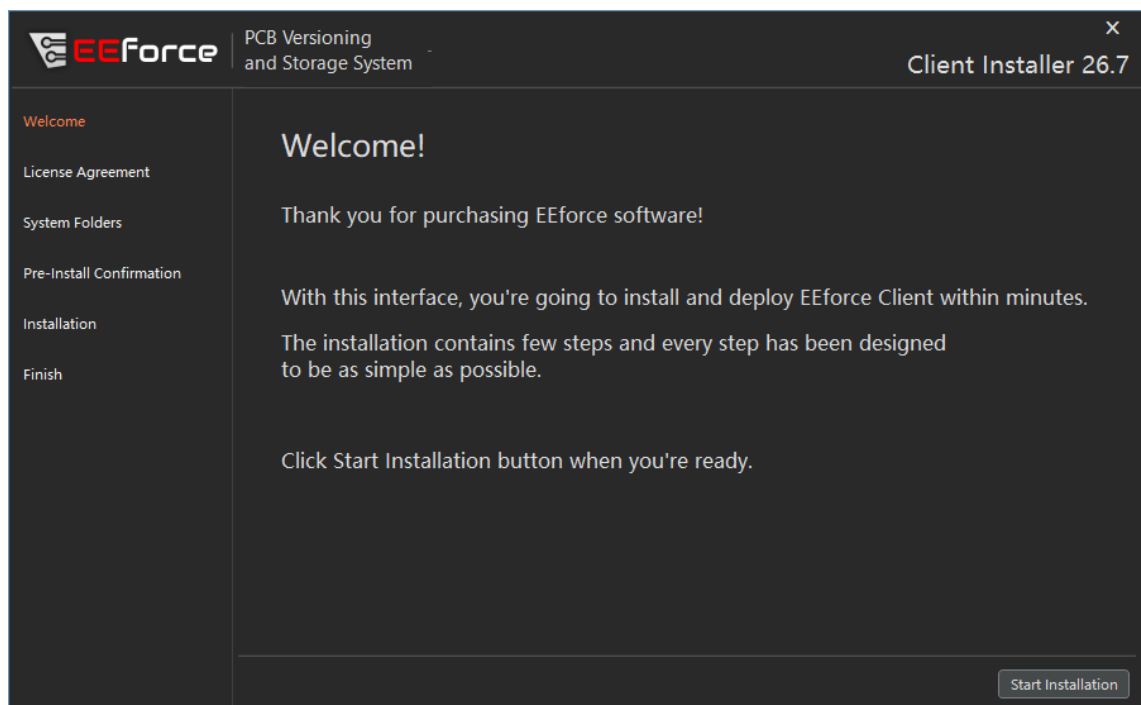
3. Unzip the downloaded file into a folder of its own.



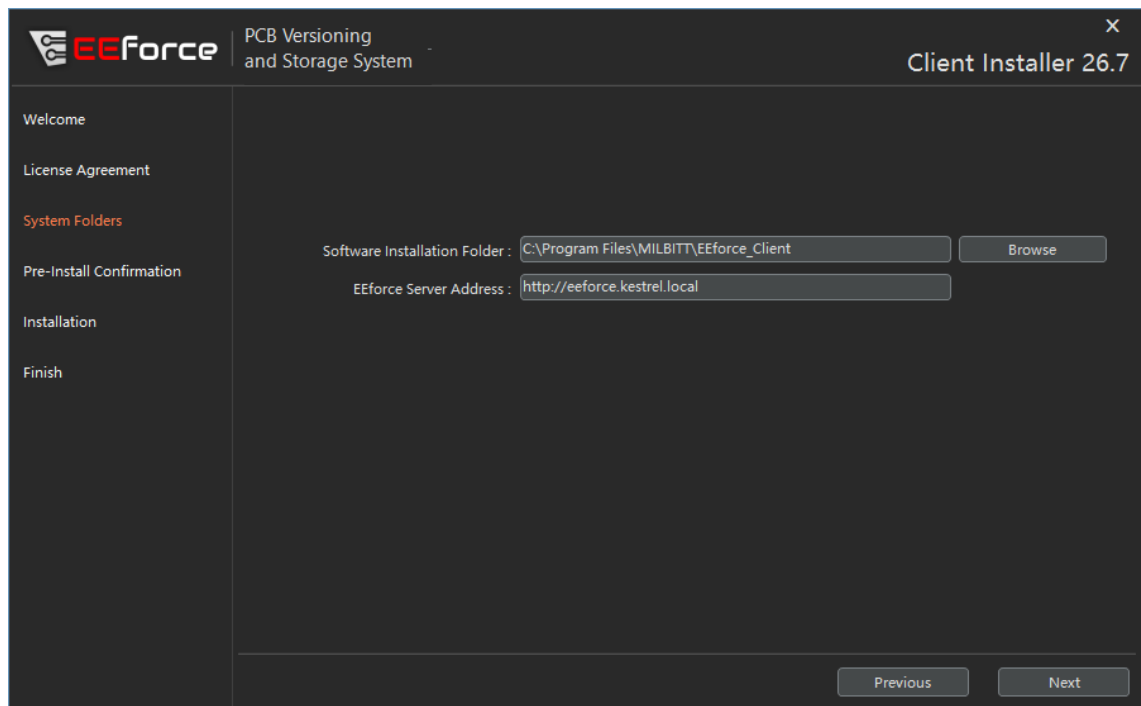
The folder holds `Install.exe`, a `packages` folder with everything the installer needs, and `server.txt`, which holds your server's address. Your IT team may also hand you the same folder.

Step 2 — Install the app

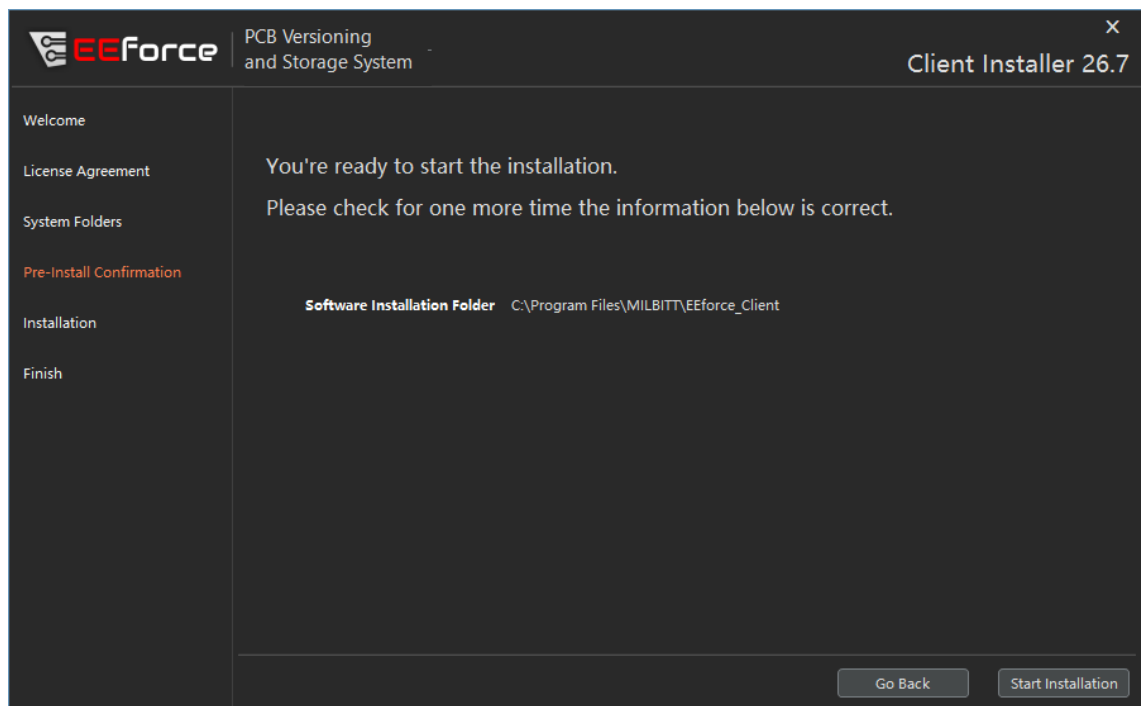
1. Run `Install.exe` and allow it when Windows asks. If your PC is missing something EEforce needs (the .NET Desktop Runtime or Microsoft Edge WebView2), the installer adds it first. It brings its own copies, so this works without internet access.
2. On the **Welcome** page, click **Start Installation**. This only starts the wizard — nothing is installed yet.



3. **Accept the licence agreement.**
4. On **System Folders**, keep the suggested **Software Installation Folder** and check the **EEforce Server Address**. If you downloaded the installer from your server, the address is already filled in. If not, type the address your administrator gave you.



5. On **Pre-Install Confirmation**, check the install folder and click **Start Installation**.



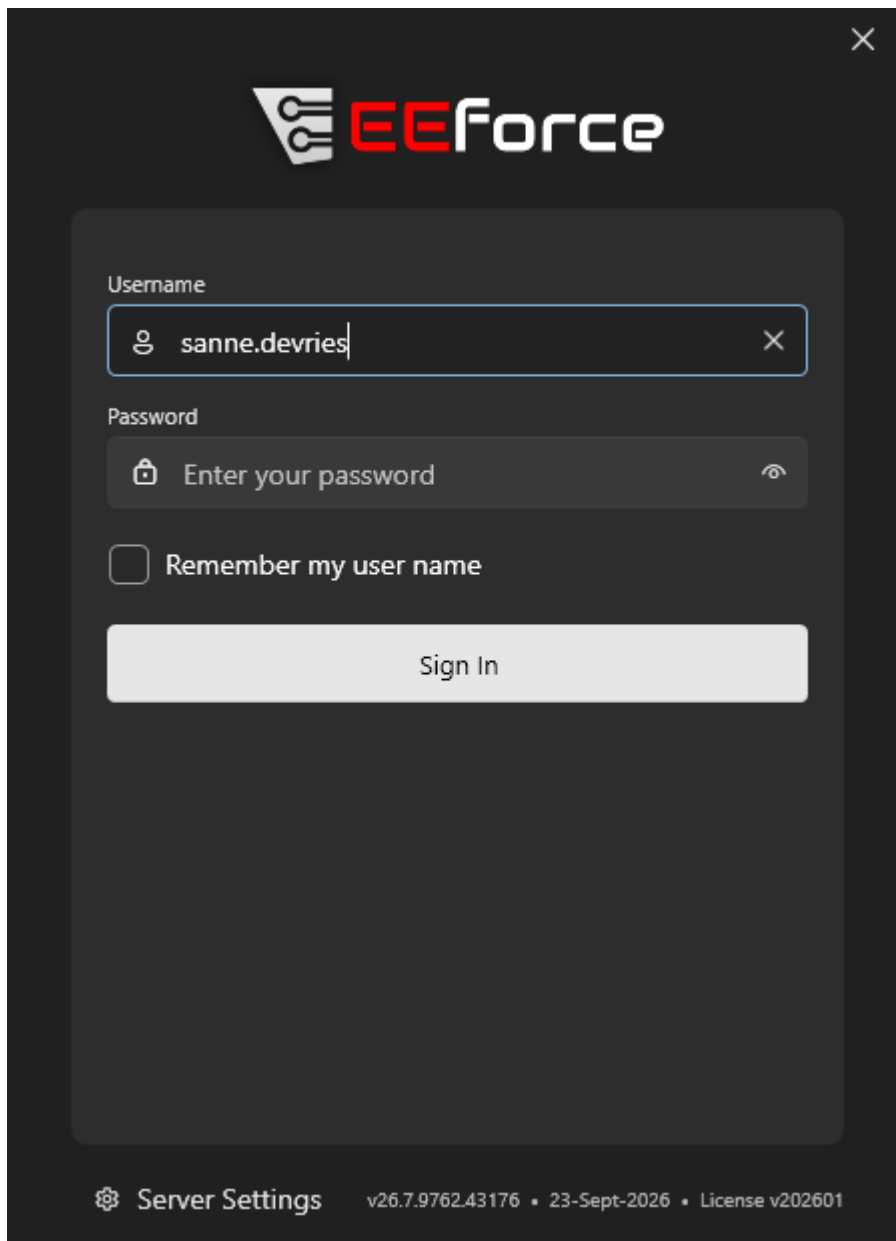
6. **Let it install.** When the **Finish** page says **All Done!**, click **Finish Installation**. If something went wrong, **Open Log File** shows what happened — send the log to your IT team.

An **EEforce** shortcut appears on your desktop and in the Start menu.

::: warning Not enough disk space? The installer checks the free space on the install drive before it copies anything. If there isn't enough, it stops and tells you how much it needs. Free up some space and run it again. :::

Step 3 — Start EEforce

Double-click the **EEforce** icon. The app connects to your server, checks for a newer version, and shows the sign-in screen:



Sign in with your username and password, then choose a licence — see [Signing In](#) for the details.

If EEforce can't reach the server, the address is probably wrong. Click **Server Settings** at the bottom of the sign-in screen and correct it — see [Using a different server](#).

::: info Installing on many PCs? IT teams can run the same installer without any windows, for example from a deployment tool: `Install.exe /silent /serverurl <address>`. See [Unattended installation](#). :::

What's next

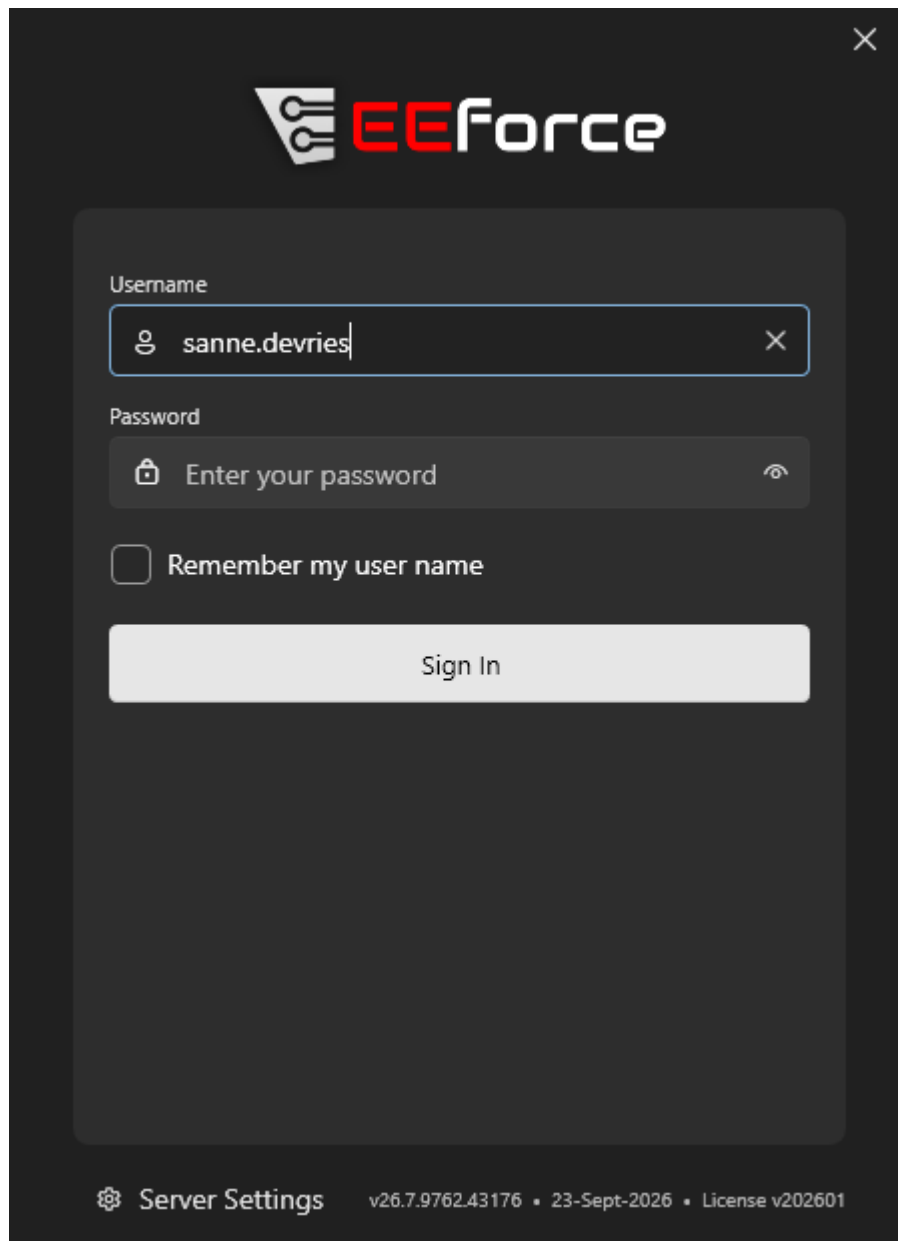
- [Signing In](#) — connect and choose a licence
- [Updating EEforce](#) — what happens when a new version arrives
- [A Tour of the Window](#) — find your way around
- [Settings](#) — connect your design tool, if you'll be editing

Signing In

Starting EEforce takes you through two steps:

1. **Sign in** — with your EEforce username and password, or with your company account if your workplace uses single sign-on.
2. **Choose a licence** — only the first time, so EEforce knows which seats you're using.

EEforce can remember both, so after the first time it's usually just your password.

A screenshot of the EEforce login window. The window has a dark gray background with the EEforce logo at the top center. Below the logo is a light gray rounded rectangle containing the login fields. The 'Username' field is a text box with 'sanne.devries' entered. The 'Password' field is a text box with a lock icon and the placeholder text 'Enter your password'. Below the password field is a checkbox labeled 'Remember my user name'. A 'Sign In' button is centered below the checkbox. At the bottom of the window, there is a status bar with a gear icon, 'Server Settings', and version/license information: 'v26.7.9762.43176 • 23-Sept-2026 • License v202601'.

Username

sanne.devries

Password

Enter your password

☐ Remember my user name

Sign In

Server Settings v26.7.9762.43176 • 23-Sept-2026 • License v202601

Signing in with a username and password

1. Enter your **Username** and **Password**. The eye icon shows the password while you type.
2. Tick **Remember my user name** so you don't have to type it next time.
3. Click **Sign In**.

Your administrator gives you your username and password. If your company connects EEforce to Active Directory, they are usually your normal Windows username and password.



EEforce remembers only your username — never your password.

Signing in with your company account (SSO)

If your company uses single sign-on, the sign-in screen also shows **Sign in with SSO**.

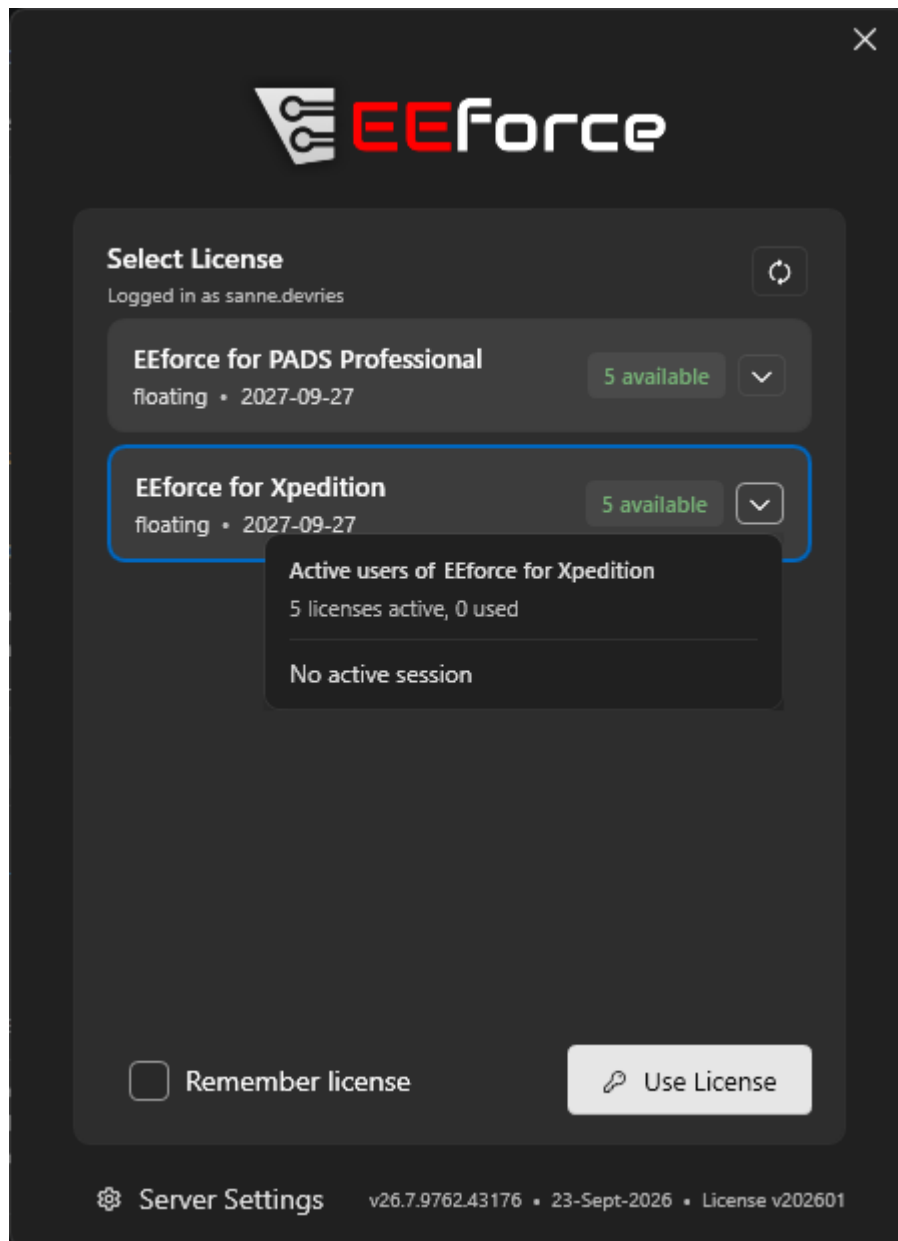
1. Click **Sign in with SSO**. Your company's sign-in page opens — either in a window inside EEforce or in your web browser, depending on how your administrator set it up.
2. Sign in there as you normally do. EEforce waits until you're done; click **Cancel** to go back.

If **Remember my user name** is ticked when you sign in with SSO, EEforce signs you in with SSO automatically next time. To stop that, open the menu under your name and choose **Remove Automatic Login**.

The **Sign in with SSO** button appears only when your administrator has switched SSO on.

Choosing a licence

The first time you sign in, EEforce asks which licence to use. There is one card for each EEforce product your company has, such as **EEforce for PADS Professional** and **EEforce for Xpedition**. Each card shows the licence type, its expiry date and how many seats are free.



1. Pick the licence your administrator told you to use — usually the one for the design tool you work with.
2. Tick **Remember license** to skip this step next time, as long as that licence has a free seat.
3. Click **Use License**.

When you close EEforce, your seat becomes free for someone else. While you're at this step:

- **Who is using a licence?** Click the arrow on a card to see the people holding seats, or the refresh button to update the numbers.

- **No seats free?** A card that says **None available** has every seat in use. Wait for a colleague to close EEforce, or ask your administrator.
- **A different licence next time?** Open the menu under your name and choose **Forget License Choice**; the step appears again at your next sign-in.

::: info Reading needs no licence Looking at designs in your web browser with **EEforce 365** doesn't use a licence seat at all. See [Reviewing in the Browser](#). :::

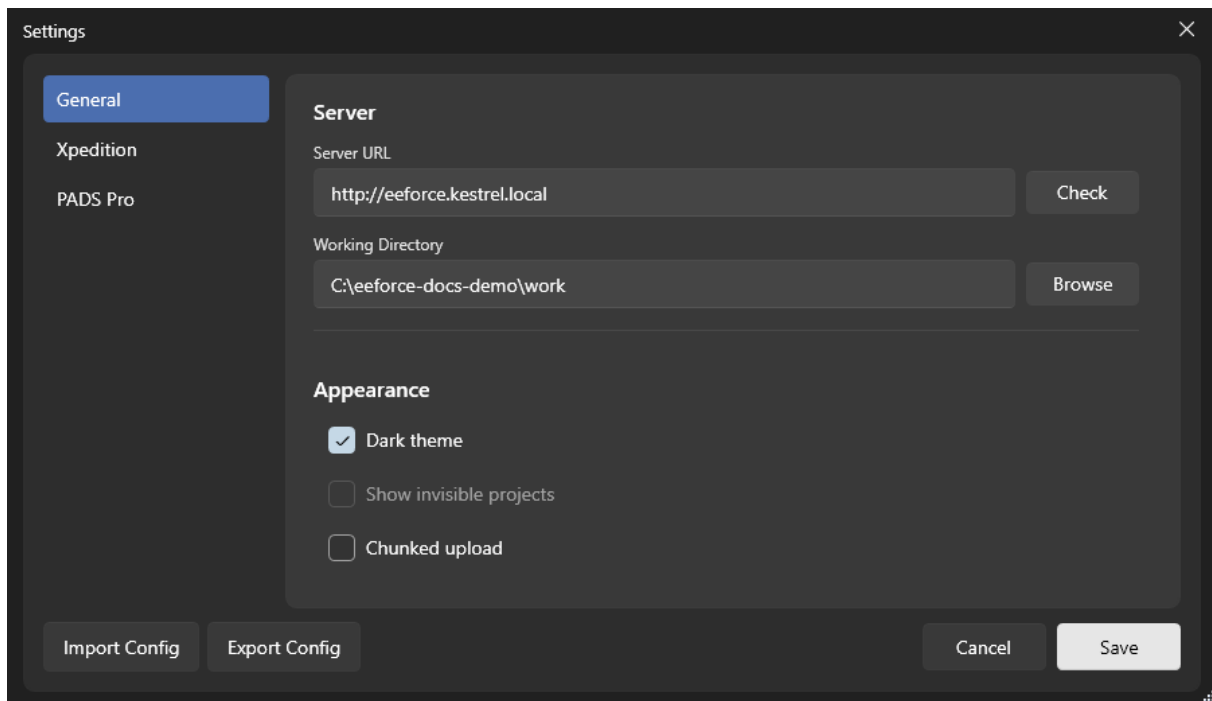
When the server licence has expired

If your company's EEforce server licence has run out, EEforce skips the licence step and opens in **read-only mode**. A **Read-Only Mode — License Expired** banner explains why. You can still browse projects, preview designs and download files, but you can't check designs out or in, or change anything else. Let your administrator know — as soon as the licence is renewed, everything works normally again.

Using a different server

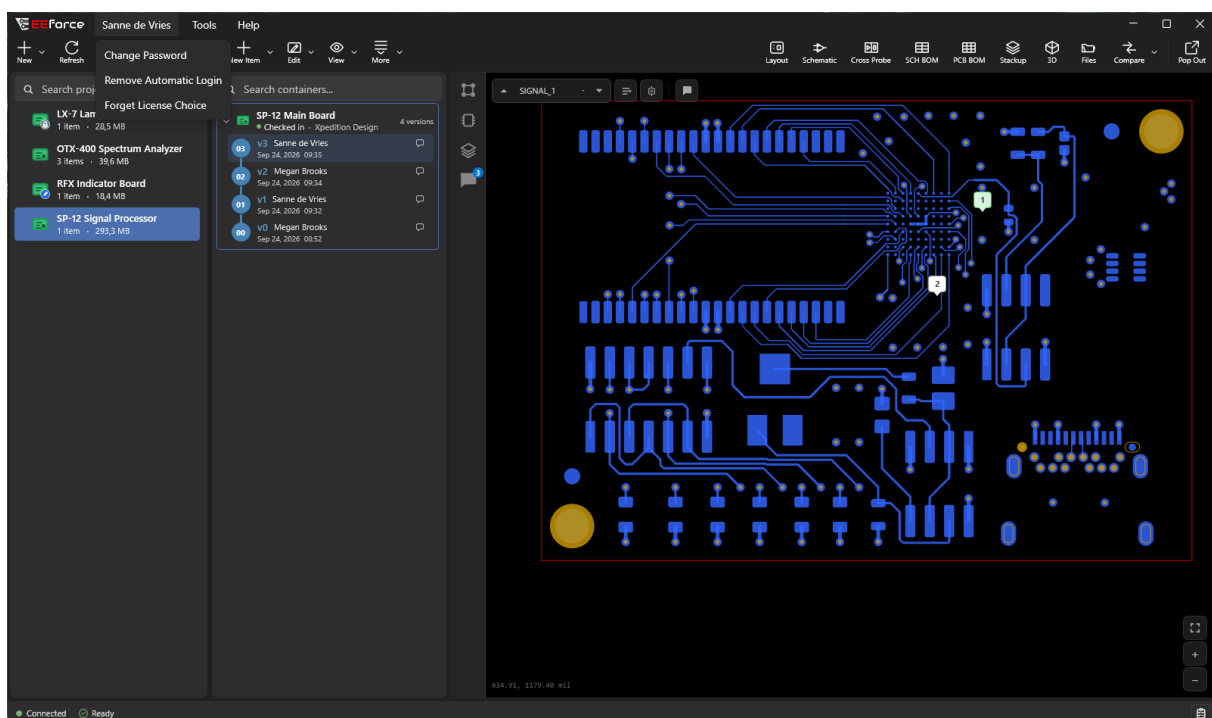
Most of the time the server is already set — usually by the installer — and you never touch this. If you do need to point EEforce at another server:

1. Click **Server Settings** at the bottom of the sign-in screen.
2. Enter the **Server URL** your administrator gave you, for example `http://eeforce.kestrel.local`.
3. Click **Check** to make sure EEforce can reach it, then **Save**.

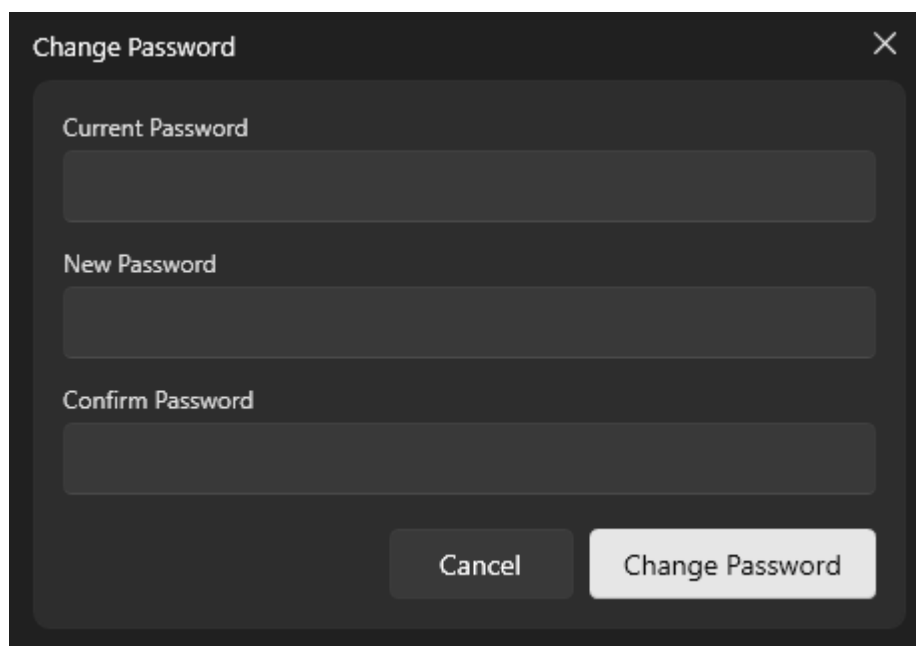


Your name menu

Once you're in, your name appears at the top left of the window. Click it for three options:



Option	What it does
Change Password	Changes your EEforce password. Enter your current password and the new one twice.
Remove Automatic Login	Stops EEforce signing you in with SSO automatically.
Forget License Choice	Shows the licence step again at your next sign-in.

A dark-themed dialog box titled "Change Password" with a close button (X) in the top right corner. It contains three text input fields labeled "Current Password", "New Password", and "Confirm Password". At the bottom, there are two buttons: "Cancel" and "Change Password".

If you sign in with your company account (Active Directory or SSO), change your password the way your company normally does it — EEforce can't change it for you.

One session at a time

You can be signed in to the EEforce app on **one computer at a time**. If you sign in on a second computer while the first is still signed in, EEforce asks what to do:

- **Switch to this machine.** — carry on here. The other computer is signed out.
- **Cancel logging in** — stay signed in on the other computer.

If you still have designs checked out on the other computer, EEforce lists them. You can then only switch by choosing **Cancel checkout(s) and switch to this machine.**, which **throws away any changes** in those checkouts. To keep your work, cancel, go back to the other computer and check the designs in first.

If your check-outs are on a computer that isn't running EEforce any more, EEforce shows a **Checked-out designs elsewhere** reminder after you sign in. Check them in when you can, so nothing gets lost. In the design list, such a design reads **Checked out by you on** that computer's name — see **Checked out on another computer**.

EEforce 365 doesn't count as a session here: you can keep it open in your browser while you work in the app.

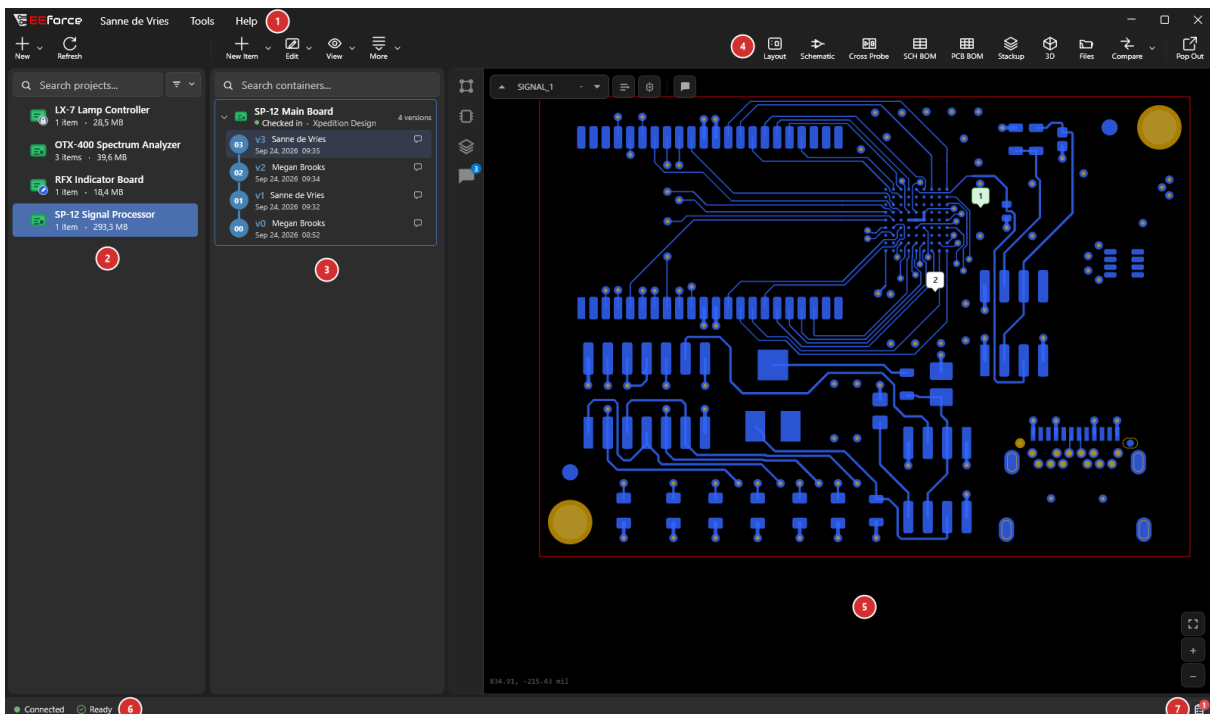
Once you're signed in, EEforce keeps your sign-in fresh in the background. What happens when a session does end, or the network drops, is covered in **Staying Connected**.

What's next

- **A Tour of the Window** — find your way around
- **Previewing Designs** — look at a board

A Tour of the Window

When you sign in, EEforce opens one window with everything in reach. Here is what you are looking at.

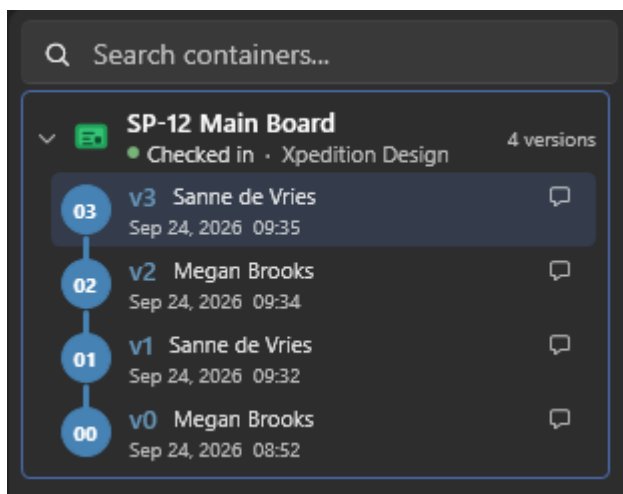


	Area	What it's for
1	Menus	The menu under your name, Tools, Help and, for the administrator account, Administration .
2	Projects	Every project you have access to. Click one to see the designs inside it.
3	Designs & versions	The designs in the selected project. Click the selected design again to see its version history.
4	Preview modes	Switch between Layout, Schematic, Cross Probe, the two BOMs, PCB Spec, 3D and Files.
5	Design preview	The built-in viewer. Shows the selected version without opening a design tool.
6	Connection status	Shows whether EEforce is connected to the server.
7	Activity Log	Recent events, with a badge counting the ones you haven't seen.

The three panes

EEforce reads left to right, the same way you work:

1. **Pick a project** on the left.
2. **Pick a design** in the middle. Click it again to open its version history.
3. **Look at it** on the right.



Each version shows its label (**v0** is the first), who checked it in, when, and an icon if it has a check-in comment — click the icon to read the comment. The newest version is at the top, and the lines on the left show how the versions follow on from each other. Selecting a version previews exactly that version. See [Designs & Versions](#) for more.

Drag the dividers between the panes to make any of them wider.

The toolbar

The toolbar runs along the top in three groups, one above each pane:

- **Above the projects:** create a project or folder, project **Properties**, refresh the list, and **More** for the other project actions.
- **Above the designs:** create or import a design, **Edit** (check out), **View**, and **More** for everything else you can do with the selected design and version. While you have a design checked out, **Edit In**, **Finish Editing** and **Revert** appear here.
- **Above the preview:** the preview mode buttons, **Compare** and **Pop Out**.

Hover over a button to see its name. Buttons you can't use right now — because of what you've selected or your role on the project — are greyed out.

Preview modes

The buttons above the preview switch what it shows. A button is available only when the selected version contains that information.

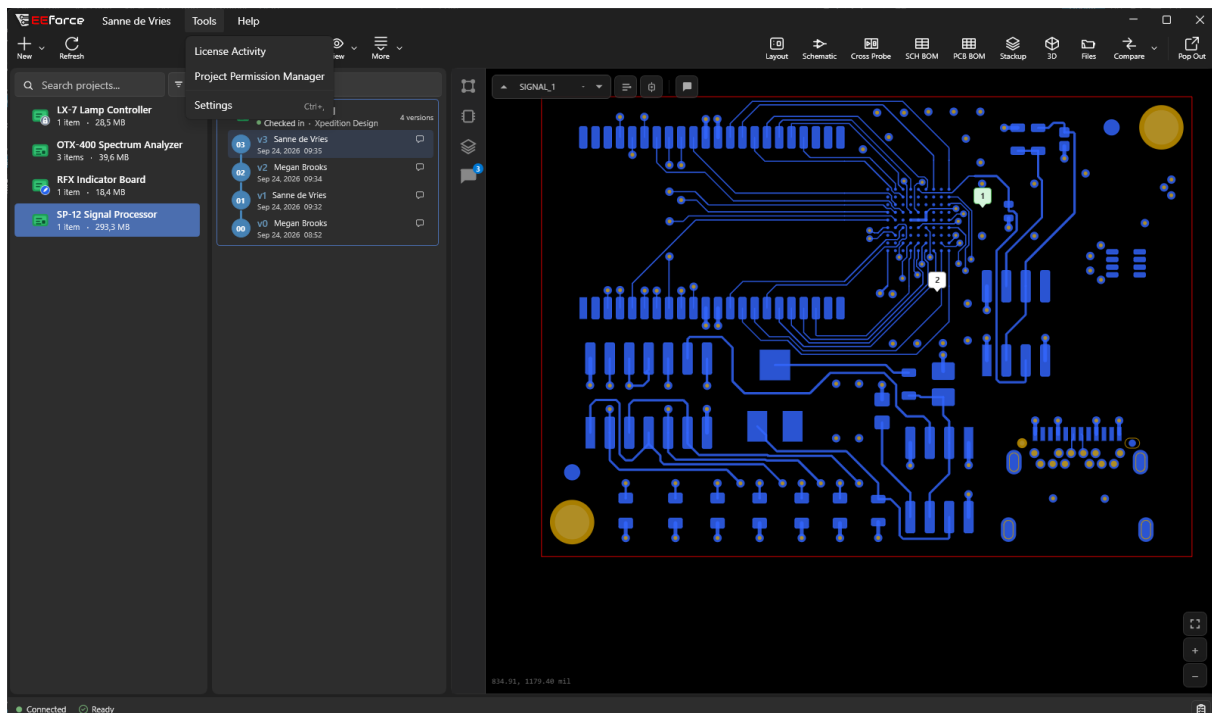
Button	Shows
Layout	The physical board: copper, components and outline
Schematic	The circuit diagram, sheet by sheet
Cross Probe	Schematic and layout together
SCH BOM / PCB BOM	The parts list, from the schematic or from the board
PCB Spec	The board's specification: stackup, vias, drills, routing, differential pairs, power and net classes

Button	Shows
3D	A 3D model of the assembled board
Files	The files inside the design

Preview modes are covered in detail in [Previewing Designs](#).

The menus

- **Your name** — Change Password, Remove Automatic Login and Forget License Choice. See [Signing In](#).
- **Tools** — **License Activity** (who is using which licence), **Project Permission Manager** (change roles on several projects at once, see [Access & Roles](#)) and **Settings**.
- **Administration** — shown only to the built-in administrator account. It opens the web administration in your browser.
- **Help** — **Documentation** opens this guide; **About EEforce** shows the version you are running.

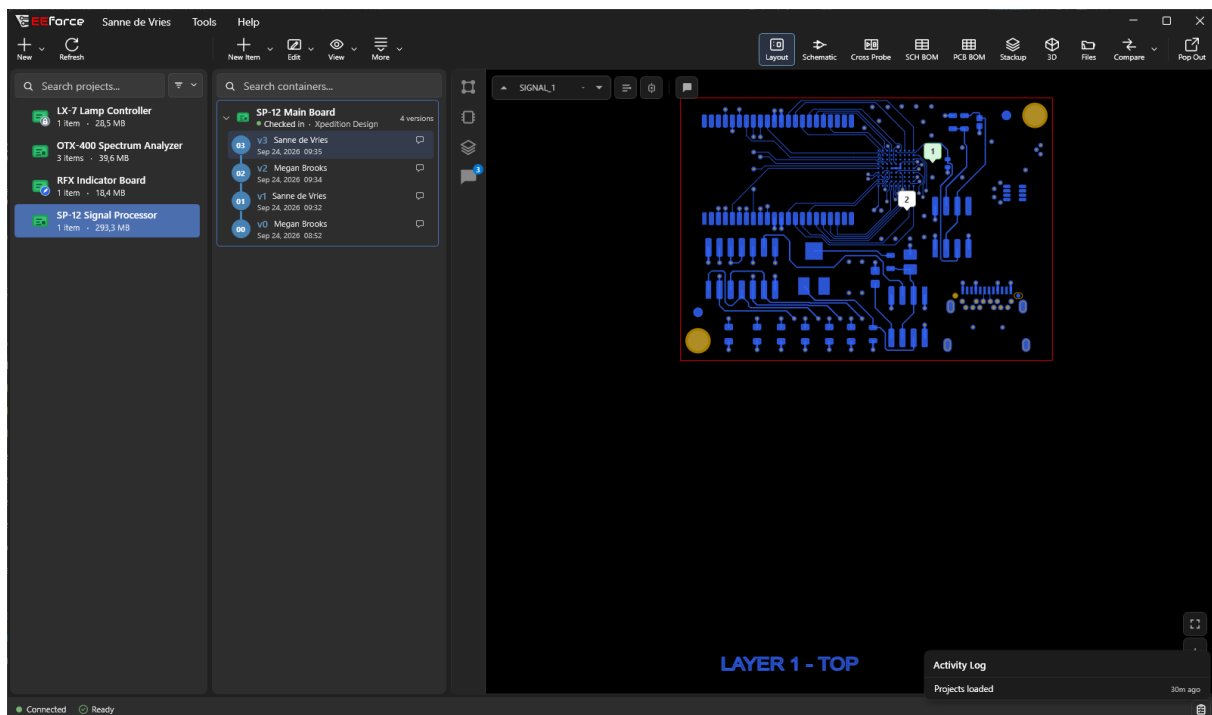


When the licence is close to its end date, a warning appears in the title bar so you can let your administrator know in good time.

The status bar

The bar along the bottom of the window shows:

- **Connection status** on the left: whether EEforce is connected to the server. See [Staying Connected](#).
- **What EEforce is doing:** a short message, and a progress bar while it downloads or uploads. A check-out, a **View** or a check-in shows its steps instead, so you can see how far it has got and what is still ahead (see below).
- **Active editors:** how many Xpedition or PADS Professional editors EEforce has opened for you. Click it to see each editor, the design it is working on and when it started. Read-only copies opened with **View** are marked **read-only**. Each of these editors carries the [EEforce Companion](#).
- **Activity Log** on the right: click it to see recent events, such as your sign-in, loaded projects and finished operations. The badge shows how many are new; opening the log clears it.



Following a check-out or check-in

While you check a design out, open it with **View** or check it in, the status bar shows the steps the operation goes through, lighting each one up as it is reached:

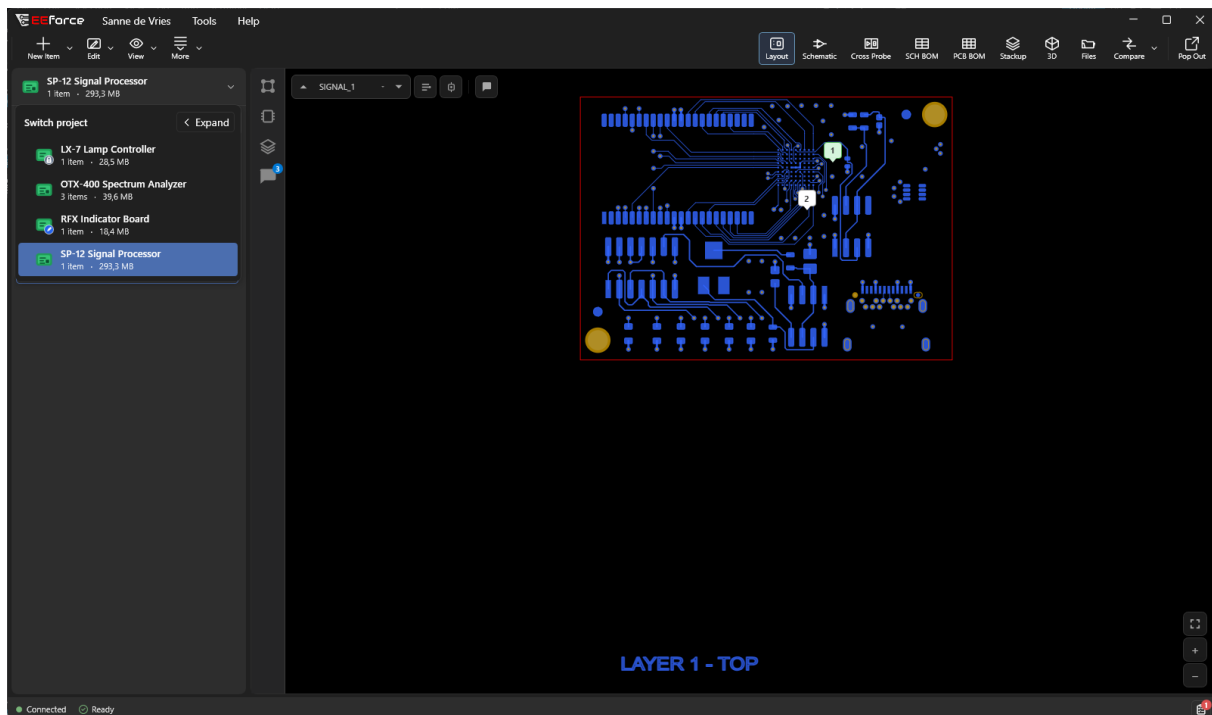
Operation	Steps
Check out / View	Download, Verify, Extract , then Start editor and <i>editor</i> open — or Open folder for the Folder Browser. A multi-board panel also fetches its Linked designs .
Check in	Clean up, CCZ (preparing the previews), Package, Upload, Verify and Finalize . Save & Check In in the editor first takes a Copy of the open design. Generic containers and multi-board panels go straight to Package .

A step that wasn't needed is marked as skipped — for example **Download** when **View** finds a copy of the version *already downloaded* on your PC. When the operation ends, the bar says **Done in** and the time it took, or **Failed at** and the step where it stopped, and then returns to the usual status line.

Each of these operations also gets one entry in the **Activity Log**: what it worked on (the project, the design and the version), when it started, and how it ended. Expand the entry to see every step with its size, time and transfer rate, the reason on the step that failed, and any warnings raised along the way. The newest entry and any that failed or warned stay expanded; earlier ones that went fine fold up to their summary line.

Focusing on one project

If you work in one project most of the day, turn on **single project mode**: right-click the project and choose **Single project mode**. The project list folds away and a banner at the top shows the current project. Click the banner to open the **Switch project** list and pick another project, or click **Expand** there to bring the full project list back.



Keyboard shortcuts

Key	Does
F5	Refresh
Ctrl+,	Open Settings
F1	Open this documentation

Your last session is remembered

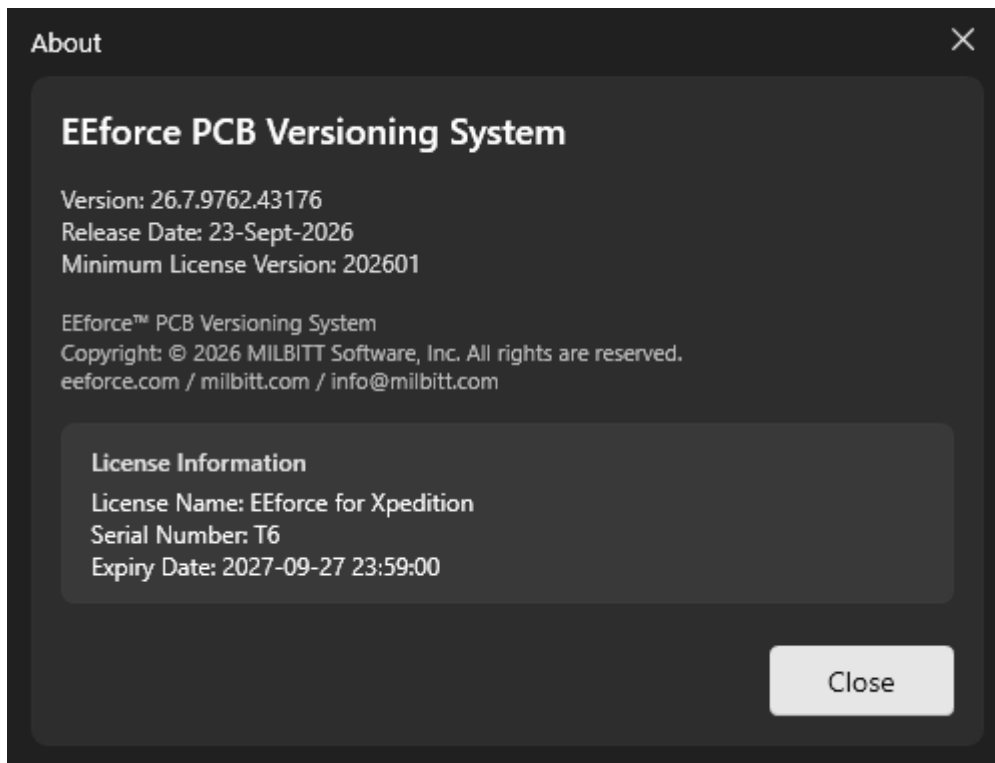
Close EEforce and open it again: it returns to the project, design and version you were last looking at, and reloads the preview — you can pick up exactly where you left off.

Two things can hold EEforce open when you close it:

- **Editors still open** — close the Xpedition or PADS Professional editors EEforce started first. They are tied to EEforce, which checks your work in when you finish.
- **Active checkouts** — if you still have designs checked out, EEforce asks whether you really want to exit. Your checkouts stay safe on the server either way, but it's best to check them in first.

About EEforce

Help → **About EEforce** shows the version of the app you are running. Have it to hand when you contact support.



Updating EEforce

New versions of the EEforce app are published on your company's server, and you don't have to look for them: the app checks at start-up and, when your administrator allows it, installs the new version itself.

What happens when you start EEforce

1. EEforce connects to your server.
2. It compares its own version with the version the server offers.
3. If EEforce is older and automatic updates are on, it downloads the new version, installs it and carries on — you just wait a moment. Windows may ask for permission, because the update installs software.
4. If your version is already current, the sign-in screen appears right away.

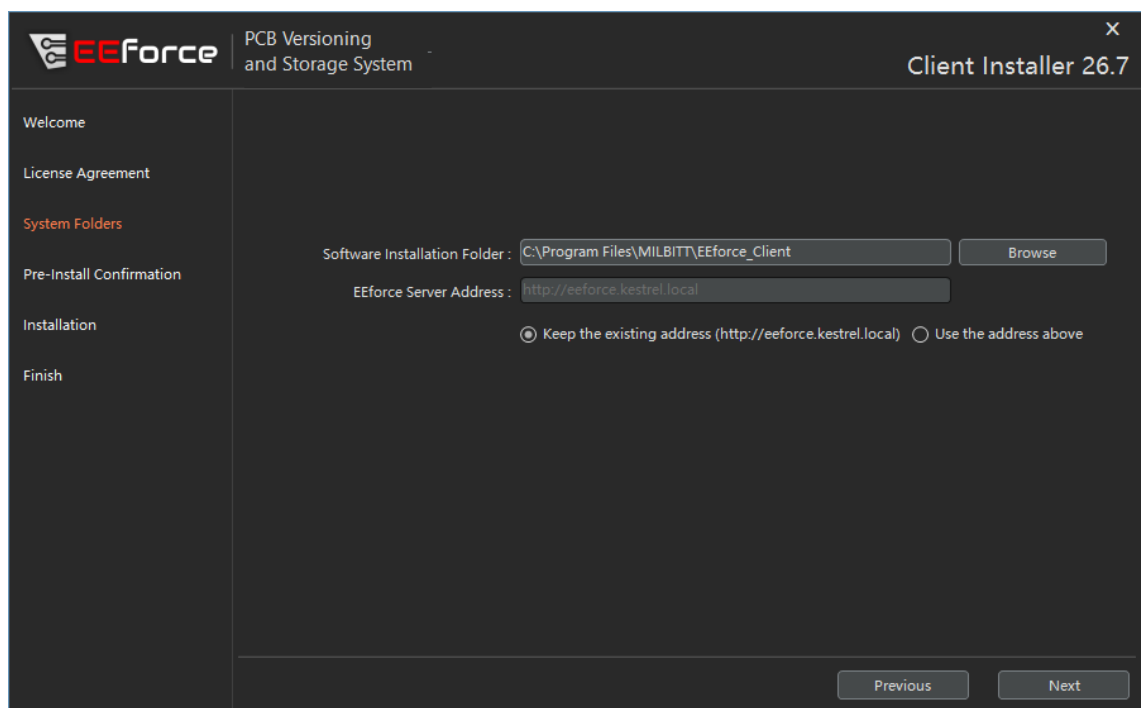
If automatic updates are switched off

Your administrator turns automatic updates on or off in the web administration (**Settings** → **General** → **Enable client auto-update**) — for example to roll out updates on the company's own schedule. If a new version is required and yours is out of date, EEforce shows this message at start-up:

A newer client version is required, but automatic updates are disabled by your administrator.
Please contact them to update this client.

Ask your IT team to install the new version — or install it yourself:

1. Download the installer from your server: **Download Client Software** on the server's start page (the same steps as **Installing EEforce**).
2. Run **Install.exe** and allow it when Windows asks. The wizard has the same pages as a first install.
3. On **System Folders**, keep the **server address** the app already uses: choose **Keep the existing address**.



4. Finish the wizard and start EEforce as usual.

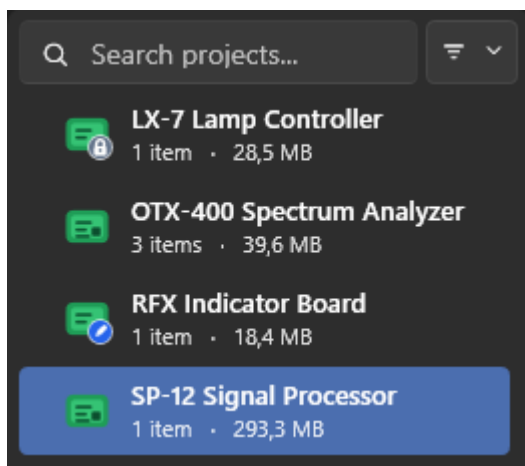
::: tip Your setup is kept An update replaces only the app itself. Your settings, your projects and the designs you have checked out stay as they are. :::

What's next

- **Installing EEforce** — a first-time install, step by step
- **Signing In** — connect and choose a licence

Working with Projects

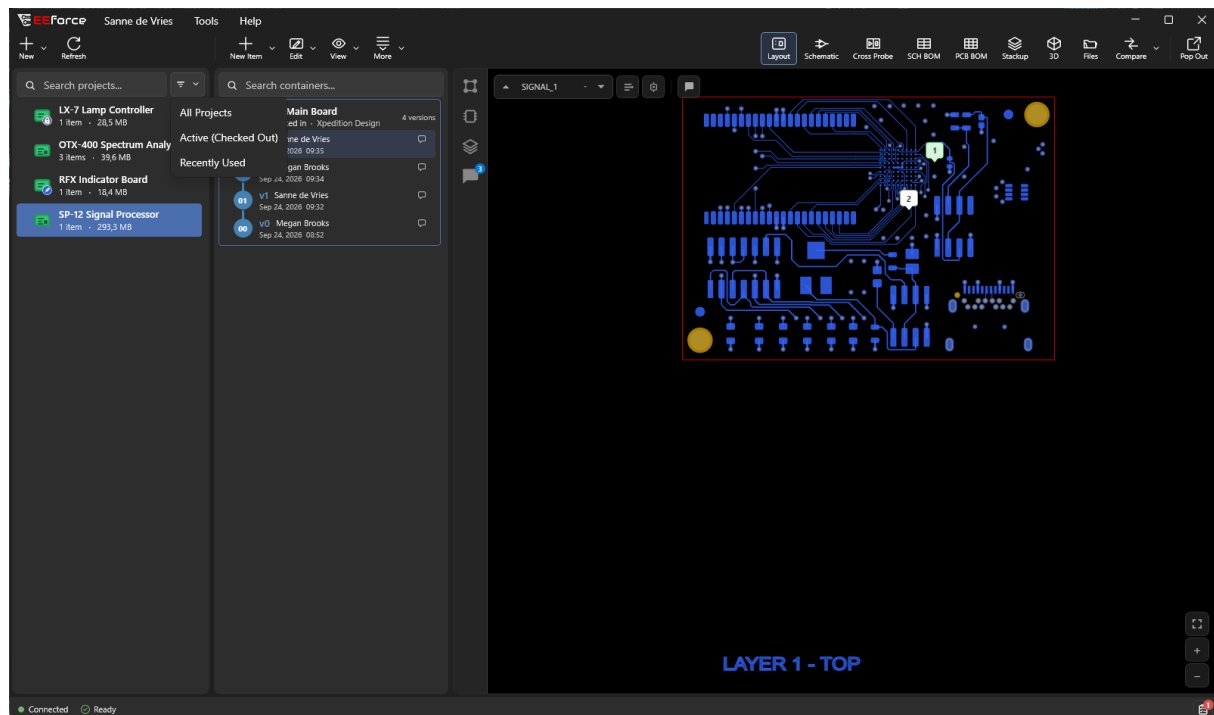
A **project** holds related work — usually one product, customer or team. It contains one or more designs and decides who can see and change them. Projects are the starting point for everything you do in EEforce.



Finding a project

The **Projects** list on the left shows every project you have access to, with the number of items and the total size of each. To narrow a long list:

- Type in the **Search projects** box to filter by name.
- Use the **filter** button beside it:



Filter

Shows

All Projects

Every project you can access.

Active (Checked Out)

Projects where a design is checked out at the moment.

Recently Used

Projects you already have in the working folder on this PC.

Your choice is remembered between sessions.

What the icons mean

The icon in front of each project tells you its state at a glance:

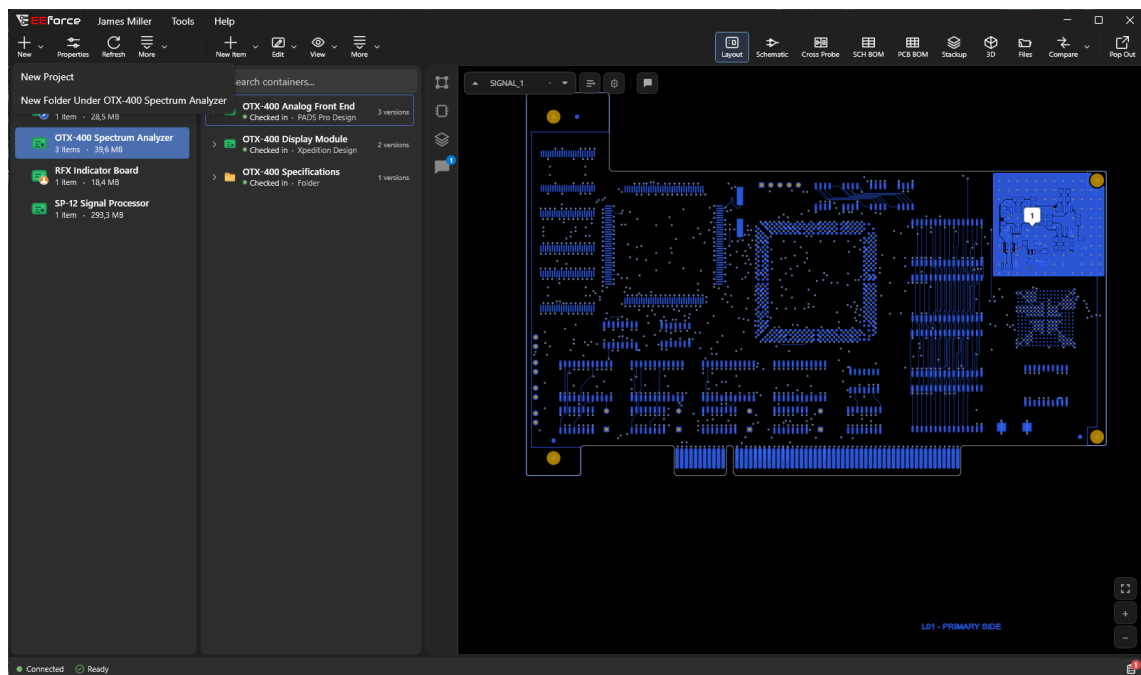
Icon	Meaning
Plain	Available. You can open its designs and, if your role allows, check them out.
Pencil	You have a design checked out in this project.

Icon	Meaning
Person	Someone else has a design checked out here.
Lock	Read-only for you: you can look, download and comment, but not change anything.
Folder	A folder inside a project (see below).

Creating a project

You need to be a member of the Project Creators or Project Administrators group.

1. Click the **Create project or folder** button above the project list and choose **New Project**.



2. Give the project a name.
3. Click **Add Users** or **Add Groups** to give people access, and pick a role for each one (see [Access & Roles](#)).
4. Save.

The new project appears in your list.

!!! info Naming Project names follow the Windows folder rules: they can't contain \ / : * ? "< > | and can't end with a space or a dot. !!!

Organising a project with folders

A project can have folders, so a project with many designs stays tidy. Folders appear under their project in the project list; select one to see the designs inside it.

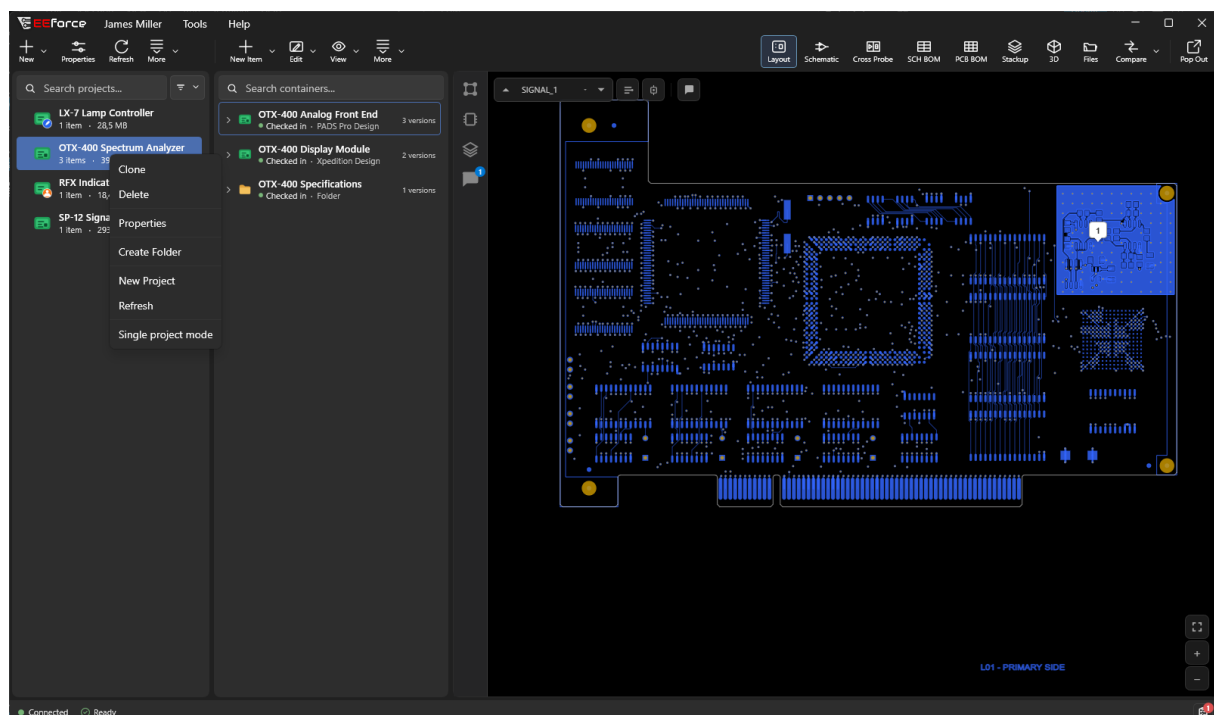
You need the Manager role on the project.

- **Create a folder:** right-click the project (or a folder) and choose **Create Folder**, or use **Create project or folder** → **New Folder Under** *project*. The new folder appears in the list with its name ready to type: type the name and press **Enter**. **Esc** or the × beside the name cancels.
- **Rename or delete a folder:** right-click it and choose **Rename Folder** or **Delete Folder**.
- **Move a design into a folder:** drag it from the design list onto the folder, or right-click the design and choose **Move to Folder**.
- **Move a folder:** drag it onto another folder, or onto the project itself to move it back to the top.

Folders only organise the list. A design keeps its history and its access rules wherever you put it, and it can't be dragged into a different project (use **Copy / Move...** for that, see [Copying or moving a design](#)).

The project menu

Right-click a project to see what you can do with it:



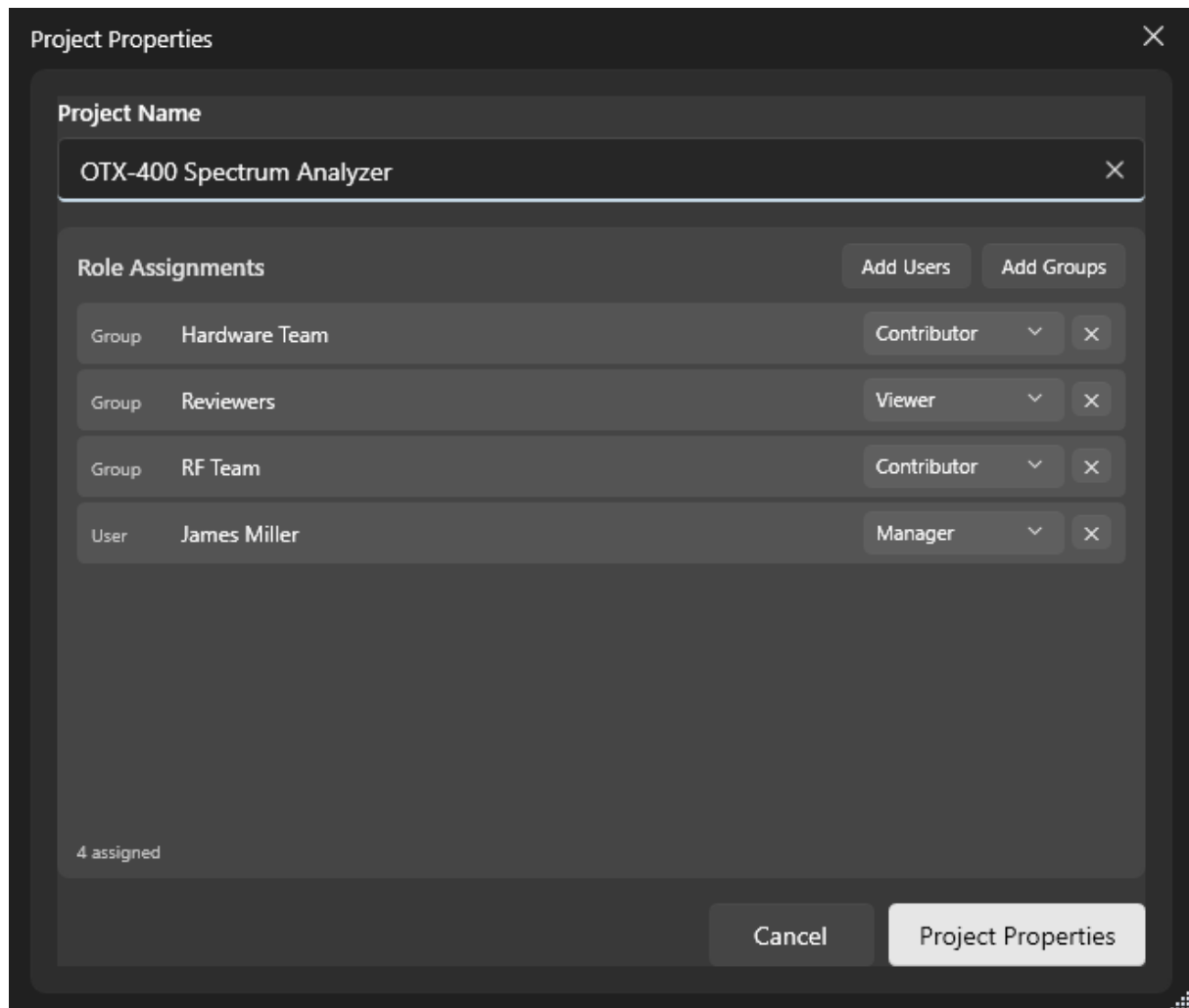
Item	What it does
Clone	Copies the whole project under a new name (see below).
Delete	Deletes the project (see below).
Properties	Renames the project or changes who has access.
Create Folder	Adds a folder to the project.
New Project	Creates a new project.
Refresh	Reloads the project from the server.
Single project mode	Folds the project list away so you can focus on this project. See A Tour of the Window .

The same actions are on the toolbar above the list: **Properties**, refresh, and **More**.

Renaming a project or changing who has access

You need the Manager role on the project.

1. Select the project and click **Properties** (or right-click it → **Properties**).
2. Change the name, or add and remove people and groups and set their roles.
3. Save.



Roles can be changed at any time — see [Access & Roles](#) for how they work.

Copying a project

You need the Manager role on the project, or membership of Project Creators. No design can be checked out.

Right-click the project and choose **Clone**, then enter a name for the copy. The copy contains every design with its full version history, and the same people and groups have access to it. You become a Manager of the copy.

Deleting a project

You need the Manager role, and no design can be checked out.



Deleting a project removes **all of its designs and their history**. The data goes to the server's trash, so an administrator can still restore it — see [Storage Assistant](#) — but do this with care.

Right-click the project → **Delete**, then confirm.

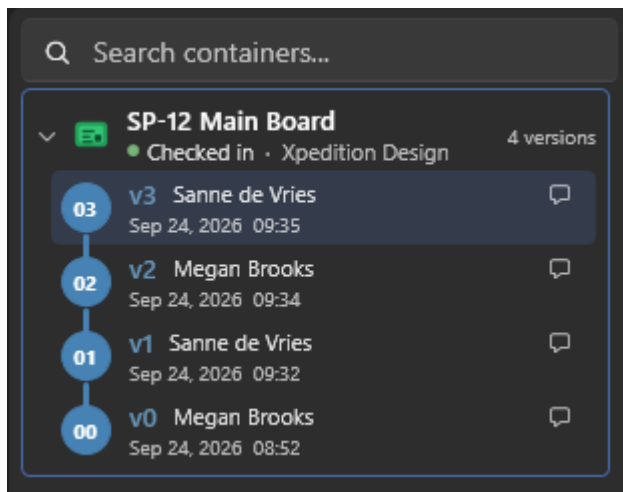
What's next

- [Designs & Versions](#) — the boards inside a project
- [Previewing Designs](#) — look inside without a design tool

Designs & Versions

A **design** is one item inside a project — a PCB design, a multi-board panel, or a generic container of other files. EEforce treats each design as one complete object and keeps its history, so every version that was checked in is one click away.

Some of the app's buttons and dialogs call a design a **container**, for example **New Container** and **Search containers...** It's the same thing.



Kinds of design

Kind	What it is
Board	An Xpedition or PADS Professional design. Gets full previews, bills of materials and one-click editing.
Multi-board panel	An Xpedition panel made up of several boards.
Generic Container	Any collection of files, such as datasheets, specifications or a draft BOM. Versioned like everything else, and shown in the file browser instead of a picture preview.

::: info Generic Containers were called Folders Earlier versions called this kind of design a **Folder**. It's the same thing under a clearer name — not to be confused with the **folders that organise a project's design list**. :::

The middle pane lists the designs in the selected project or folder. Each row shows the design's state, its design tool and how many versions it has. Use the search box above the list to filter a long list.

State	Means
Checked in	Nobody is editing it.
Checked out by you	You are editing it on this computer.
Checked out by you on <i>another computer</i>	You checked it out on another computer; the working copy is there. See Checked out on another computer .
Checked out by <i>a colleague</i>	Someone else is editing it. You can still view it.
Checked out remotely by <i>you or a colleague</i>	It was exported to work on away from the server. See Working Remotely .
Downloading...	A check-out is in progress.

Version history

Click a design to select it; the preview shows its latest version. Click it again to open its history, and once more to close it. Only the selected design shows its history: selecting another design closes the one before.

Each version shows:

- Its **label**: **v0** is the first version, then v1, v2 and so on.
- **Who** checked it in, and **when**.
- A comment icon if it has a **check-in comment**. Hover over it to read the start of the comment, or click it to read the whole comment with its author and date.
- A **lock** or **tag** badge if the version is locked or tagged — see [Managing Versions](#).

The newest version is at the top. The lines on the left show which version each one was based on. Usually that is a straight line; when someone checks out an older version, the new work shows as a branch.

While a design is checked out, a **pending version** appears at the top in amber. It becomes a real version when it is checked in.

Select any version to preview exactly that version or to download files from it.

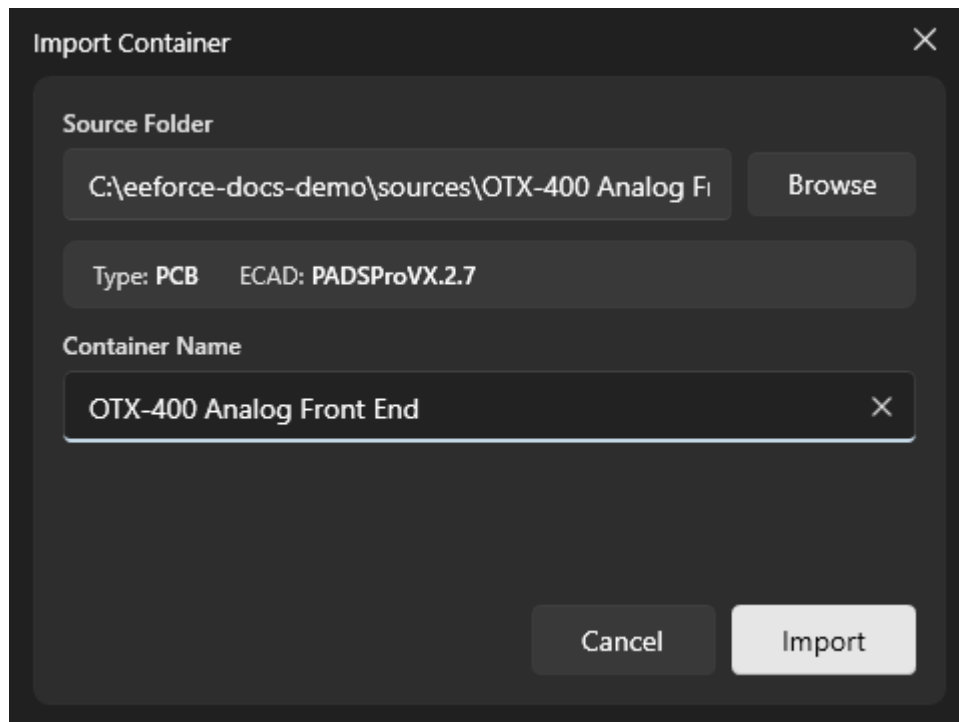
Adding a design to a project

Use **New Item ▼** above the design list and choose **New Container** or **Import**.

You need the Contributor or Manager role on the project to import a design or to start a blank generic container. Starting a design from a template adds a copy of that template to the project, which needs the **Manager** role.

Importing an existing design

1. Select the project.
2. Choose **Import**.
3. Under **Source Folder**, click **Browse** and pick the folder that holds your design (the folder with the project file in it). EEforce detects the **Type** and the design tool (**ECAD**) for you.
4. Check the **Container Name** and click **Import**.



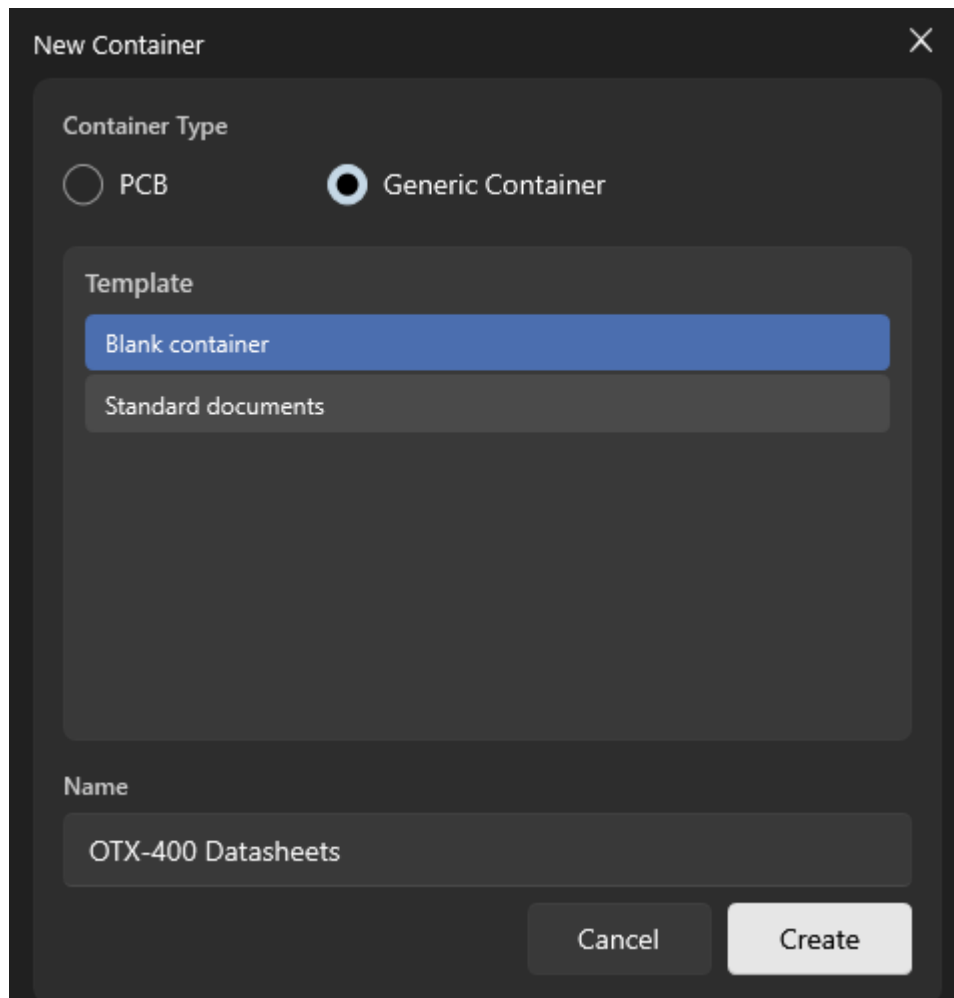
EEforce packages the design and uploads it as **v0**. You can watch the progress at the bottom of the window.

Starting a new design

1. Choose **New Container**.
2. Pick the **Container Type: PCB, Multi-Board Panel** or **Generic Container**. **Multi-Board Panel** is offered for the Xpedition flow on computers with Fablink installed.
3. For a PCB or a panel, pick the **ECAD Flow** (Xpedition or PADS Pro — only the design tools installed on your computer can be chosen) and a **Template**.

For a generic container, the template list starts with **Blank container**, an empty container you fill on your first check-out. Any generic-container templates your company has set up follow it.

4. Give the design a **Name** and click **Create**.

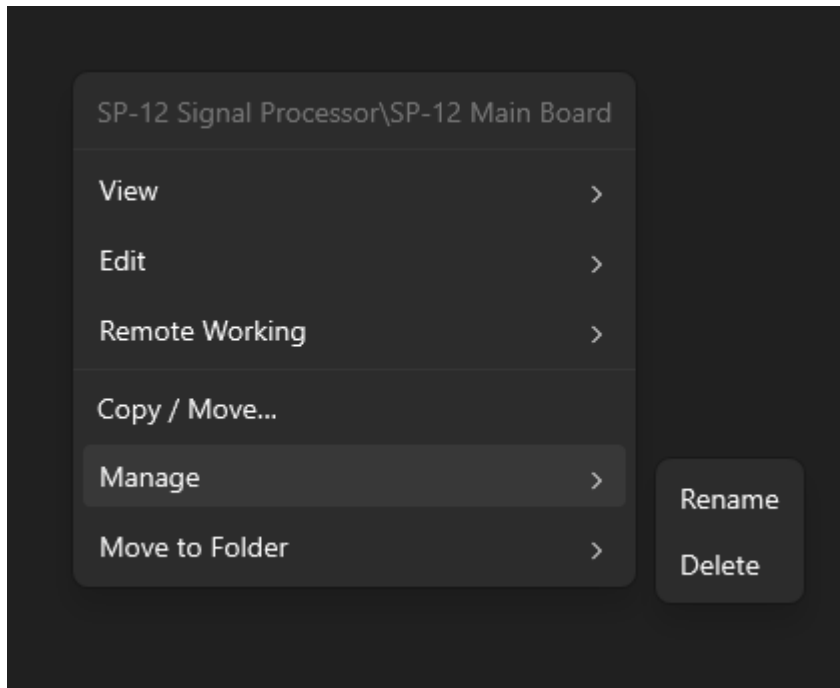


The new design is created in the project or folder you have selected. Its v0 is a copy of the template.

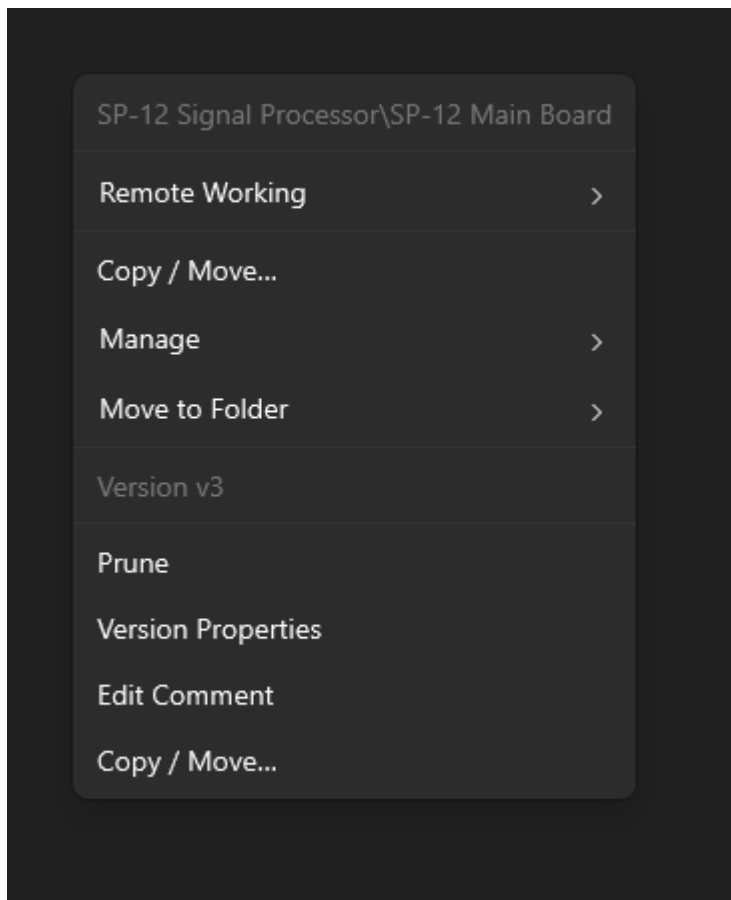
... info Where templates come from Templates are the designs in the server's `_sys.Templates` project. If the list says *No templates found for this type*, ask your administrator to import one there. ...

The design menu

Right-click a design to see what you can do with it. The same actions, plus those for the selected version, are under **More** on the toolbar.



Item	What it does
View	Opens a read-only copy in the Folder Browser or your design tool. See Checking Out & Checking In .
Edit	Checks the design out so you can change it. See Checking Out & Checking In .
Remote Working	Takes the design with you to work away from the server. See Working Remotely .
Copy / Move...	Copies the design — into this project or another one — or moves it to another project or folder (see below).
Manage → Rename	Changes the design's name.
Manage → Delete	Deletes the design (see below).
Move to Folder	Puts the design in one of the project's folders. See Working with Projects .



The **Manage** items and **Move to Folder** need the **Manager** role, and the design must be checked in. **Copy / Move...** is open to everyone with access to the project; the dialog tells you what your role allows.

Copying or moving a design

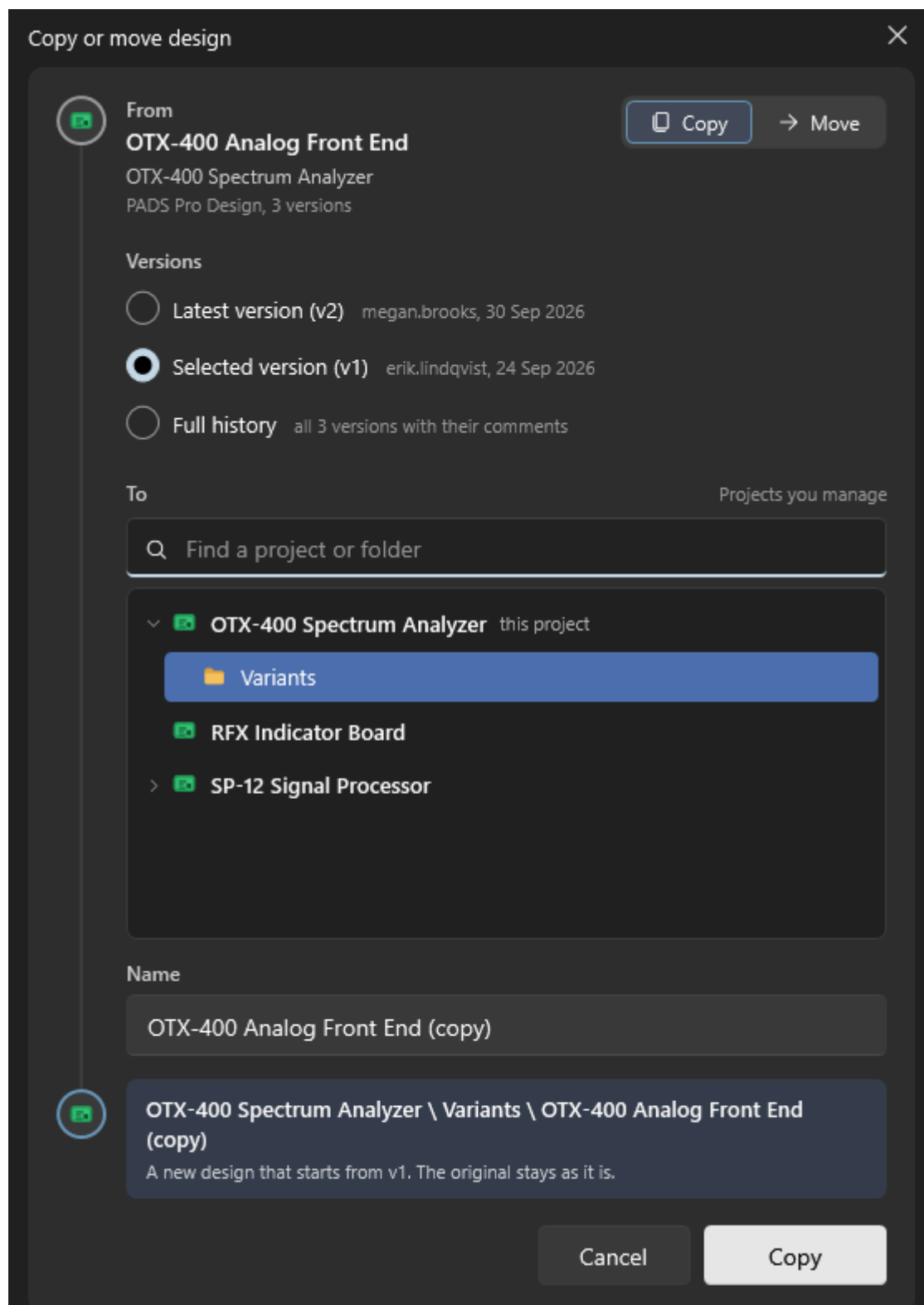
Copy / Move... does everything that takes a design somewhere else: a copy in the same project, a copy in another project, or a move to another project or folder.

1. Right-click the design → **Copy / Move...** (To copy a particular version, right-click that version instead.)
2. Choose **Copy** or **Move**.
3. For a copy, choose which **Versions** to take:
 - **Latest version** — a new design that starts from the latest version.
 - **Selected version** — a new design that starts from the version you had selected. Offered when that isn't the latest.

- **Full history** — a new design with every version and its check-in comment.

A move always takes the full history.

4. Under **To**, pick the project or folder. The list shows the projects you manage, with their folders; type in the search box to find one. The design's current place is marked *where it is now*.
5. Check the **Name**. When the name is already taken in the destination, EEforce suggests one such as *name (copy)*.
6. Check the result at the bottom of the dialog — where the design will end up, and what it takes — then click **Copy** or **Move**.



To...	You need
Copy a design	Any role on the project it's in — a Viewer can copy a design into a project of their own — and the Manager role on the destination project.
Move a design	The Manager role on both projects, and the design must be checked in.

When something stands in the way, the dialog says so: **Move** is greyed out with the reason, and a name that is taken or not allowed is pointed out before you confirm. If you don't manage any project, the dialog explains that there's nowhere to put the design yet.

What comes along:

- A **copy** is a new design. With the full history it keeps every version's check-in comment and tag, and versions that were pruned stay pruned; locks stay with the original. A copy from one version starts at v0 with that version's content and comment. The original isn't changed.
- A **move** takes the design exactly as it is: every version with its comments, tags and locks. Within the same project, a move simply changes its folder (and its name, if you changed it).

::: info Moving keeps a safety copy When a design moves to another project, a copy of its files is kept in the server's trash, where an administrator can restore it. See [Storage Assistant](#). :::

Managing versions

Locking, tagging, pruning and copying versions each have their own steps — see [Managing Versions](#).

Deleting a design

You need the Manager role, and the design must be checked in.



Deleting removes the design and its entire history from the project. The data goes to the server's trash, where an administrator can still restore it — see [Storage Assistant](#).

Right-click the design → **Manage** → **Delete**, then confirm.

Multi-board panels

A multi-board panel is a design that carries several boards. Create it like any other design — the **Multi-Board Panel** type appears for the Xpedition flow on machines with Fablink installed. Once it exists, right-click it and open the **Multi Board Panel** submenu: **Update Links** re-links the panel to the newest version of each related board, **Link Editor** changes which designs the panel uses, and **ReDownload** fetches the linked boards again while the panel is checked out to you.

Editing a design

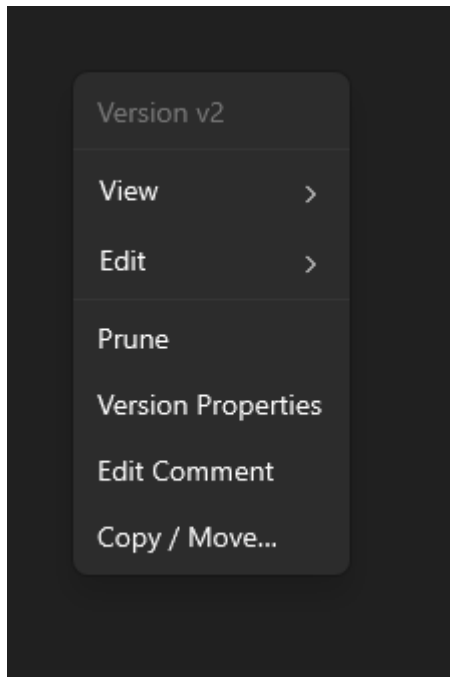
Changing a design is its own short workflow — check out, edit, check in. It has a page of its own: [Checking Out & Checking In](#).

Managing Versions

Every check-in adds a version to a design, and EEforce keeps them all. This page covers the version actions: locking, tagging and pruning, which need the **Manager** role on the project, and copying a version into a new design. To preview, check out or download a specific version, see [Checking Out & Checking In](#) and [Browsing & Downloading Files](#).

The version menu

Right-click a version (or select it and open **More** on the toolbar):

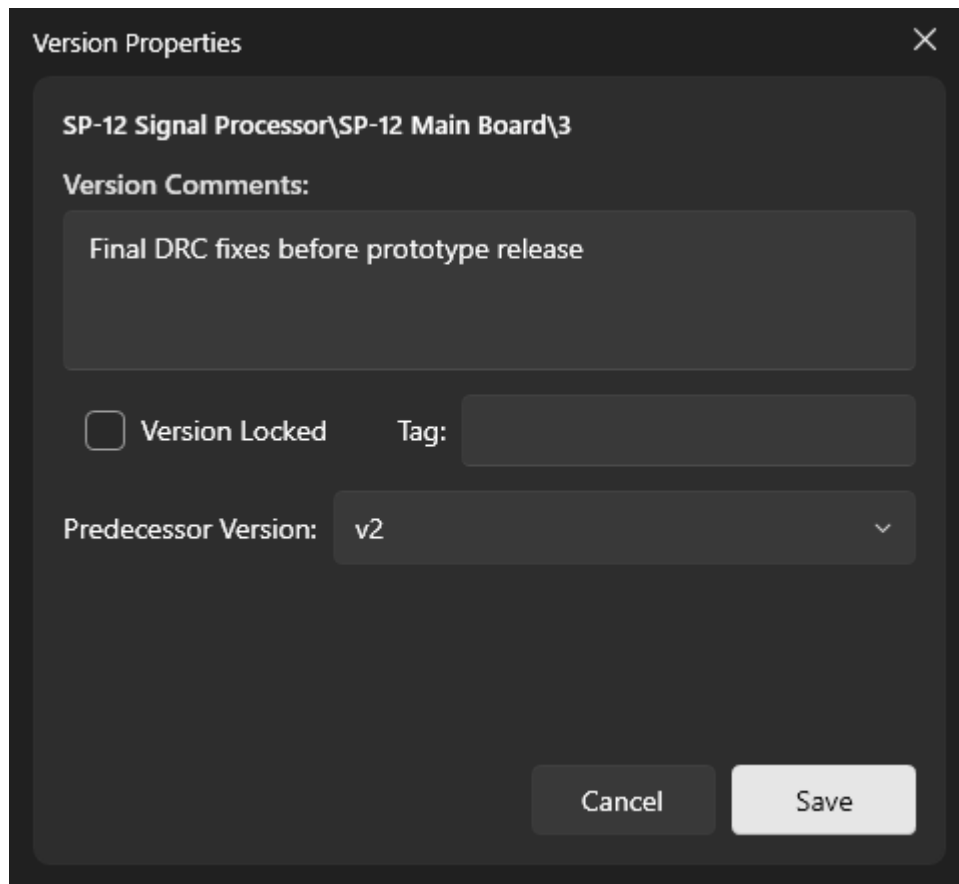


Item	What it does
View / Edit	Opens or checks out this version. Checking out an older version starts a branch. See Checking Out & Checking In .
Prune	Removes the version's data from the server (see below).
Version Properties	Edits the comment, locks the version or gives it a tag.
Edit Comment	Changes the version's check-in comment.
Copy / Move...	Starts a new design from this version (see below).

Prune, **Version Properties** and **Edit Comment** need the **Manager** role, and the design must be checked in. **Copy / Move...** is greyed out for a pruned version, whose files are no longer there to copy.

Locking and tagging a version

Open **Version Properties** to see a version's details:

A dark-themed dialog box titled "Version Properties" with a close button (X) in the top right corner. The dialog contains the following fields: a text field for "SP-12 Signal Processor\SP-12 Main Board\3", a "Version Comments:" label followed by a large text area containing "Final DRC fixes before prototype release", a "Version Locked" checkbox which is unchecked, a "Tag:" label followed by a text field, a "Predecessor Version:" label followed by a dropdown menu showing "v2", and "Cancel" and "Save" buttons at the bottom right.

Version Properties

SP-12 Signal Processor\SP-12 Main Board\3

Version Comments:

Final DRC fixes before prototype release

☐ Version Locked Tag:

Predecessor Version: v2

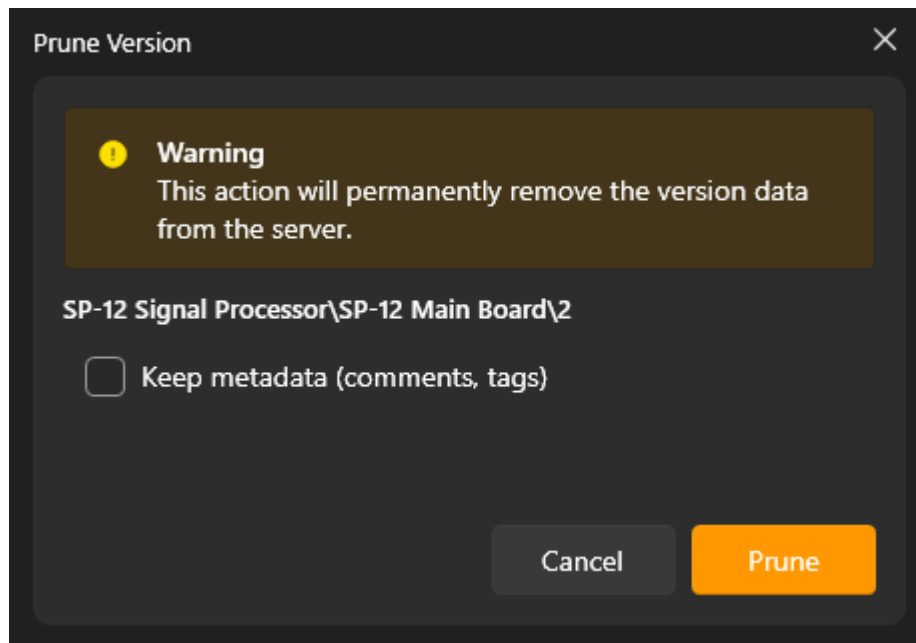
Cancel Save

- **Version Comments** — the check-in comment. You can correct it here.
- **Version Locked** — protects the version from being pruned. A locked version can still be checked out; the new work simply branches off it.
- **Tag** — a short label, such as [Prototype](#) or [Release A](#), that shows as a badge in the version list.
- **Predecessor Version** — the version this one was based on.

Click **Save** to keep your changes.

Pruning a version

Pruning frees space on the server by removing an old version's data. Use it for versions nobody will need again.



Tick **Keep metadata (comments, tags)** to keep the version in the history with its comment and tag, marked as pruned. A pruned version can still be previewed, but it can no longer be checked out or downloaded. Without the tick, the version disappears from the history altogether. You can't prune a locked version or a design's only version.



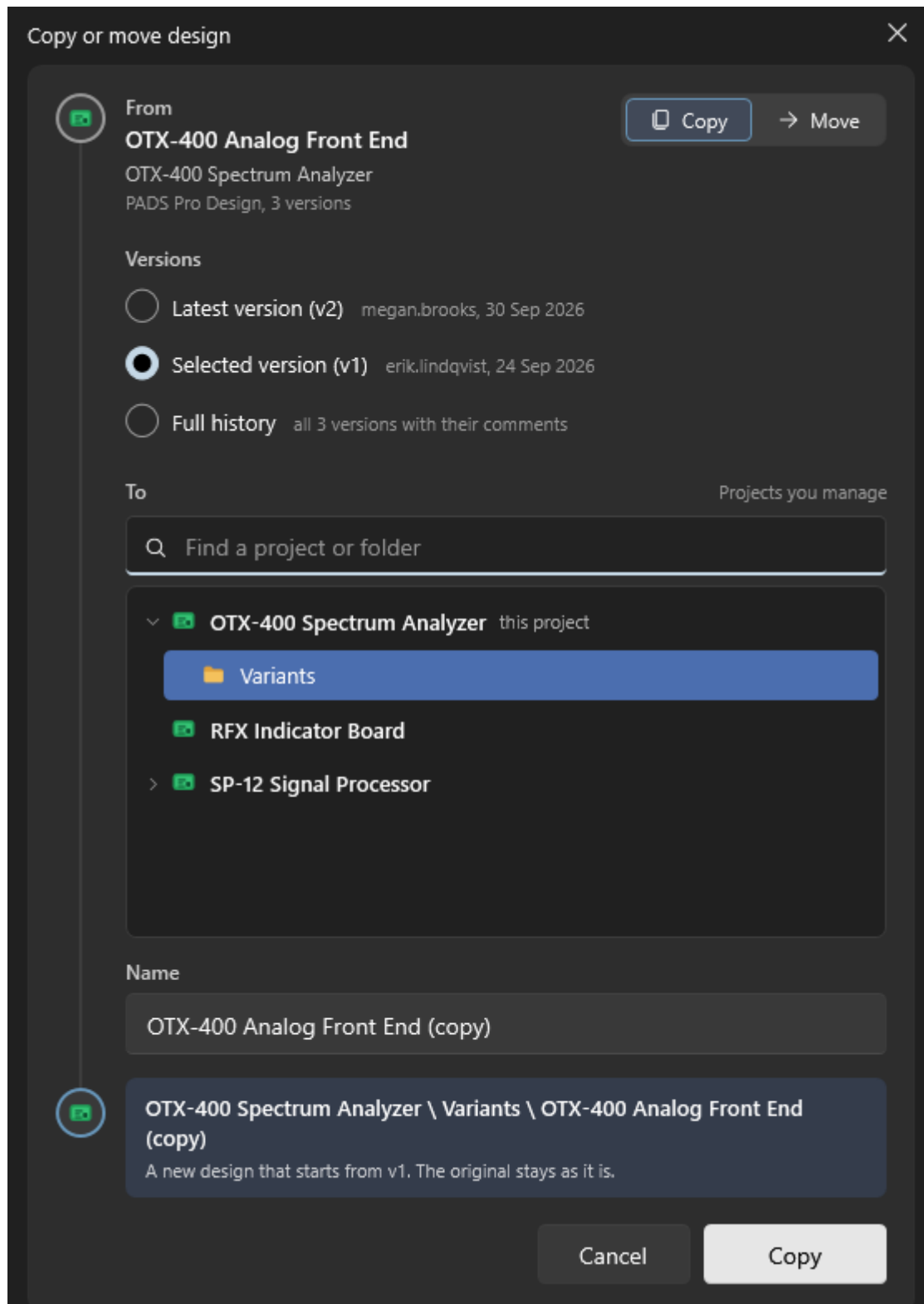
For you and your team, pruning is final: the version's files are gone from the project. They go to the server's trash, though, so an administrator can still restore them until the trash is emptied — see [Storage Assistant](#).

Administrators can also prune many versions at once, across a whole project, and see how much space each version takes — see [Storage Assistant](#).

Starting a new design from a version

Copy / Move... on a version turns it into a new, separate design — for example to start a variant of a board from a proven revision.

1. Right-click the version → **Copy / Move...** The dialog opens with **Copy** chosen and **Selected version** ticked.
2. Under **To**, pick the project or folder for the new design. It can be the same project.
3. Check the **Name** and click **Copy**.



The new design starts at v0 with the content and comment of the version you picked. The original

design isn't changed.

You need any role on the design's project and the **Manager** role on the project the new design goes into. The same dialog can also copy the whole history, or move the design — see [Copying or moving a design](#).

What's next

- [Designs & Versions](#) — the boards inside a project
- [Checking Out & Checking In](#) — edit a design and save a version

Access & Roles

EEforce shows you only the projects you're allowed to see, and lets you do only what your **role** on each project permits. This keeps everyone's work safe and tidy — you'll never accidentally change a project you're only meant to look at.

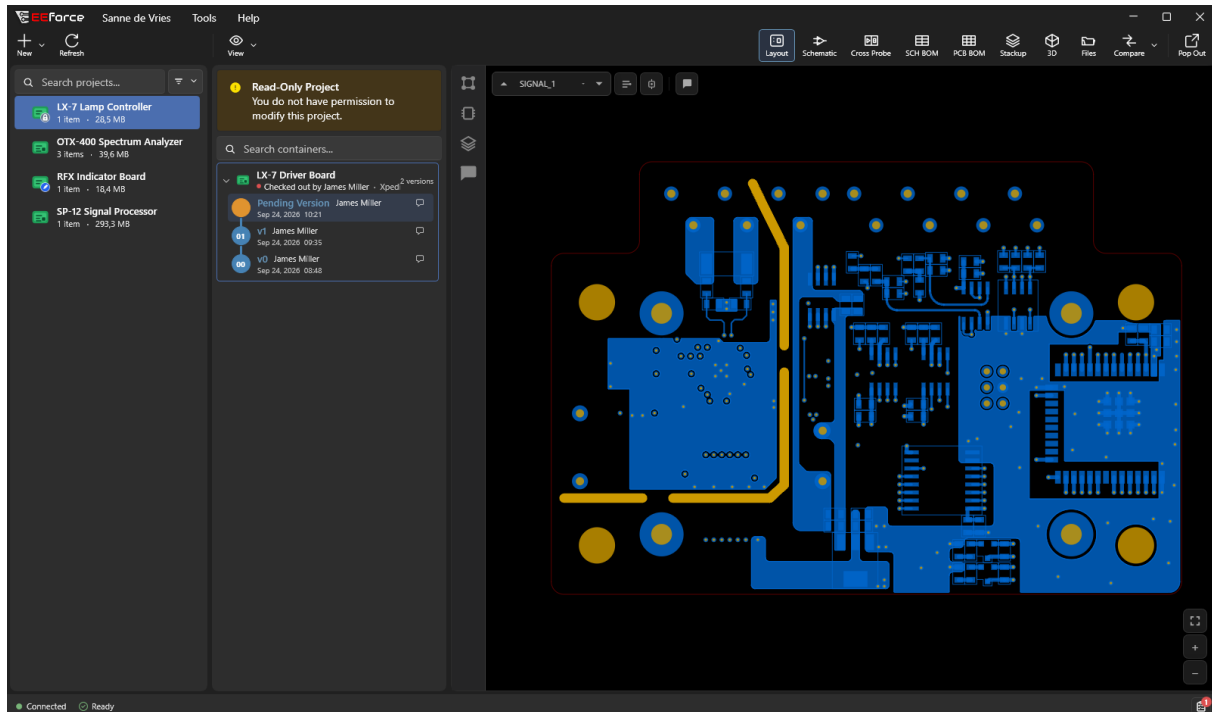
What you can do depends on your role

Each project gives you one of three roles:

Your role	What you can do
Viewer	Browse the project, preview and compare its designs, download files, and take part in the conversation: comments and replies are allowed while the server licence is active. Read-only otherwise.
Contributor	Everything a Viewer can, plus check designs out, edit them, check in new versions, and resolve or reopen comments.
Manager	Everything a Contributor can, plus manage the project itself — rename it, clone or delete it, and decide who else has access.

If you have no role on a project, it simply doesn't appear in your list. That's normal — you're seeing exactly the projects meant for you.

If you're a Viewer, a **Read-Only Project** banner appears while the project is open — a reminder that editing is off the menu.



::: info Project access and licence expiry A Viewer's **Read-Only Project** banner still allows comments. The server-wide **Read-Only Mode — License Expired** state prevents changes, including comments, for every role. See [Licensing](#). :::

“Why can’t I...?”

You're trying to...

...but can't, because

See a project a colleague mentioned

You haven't been given access. Ask a Manager of that project (or an administrator) to add you.

Check out / edit a design

You're a **Viewer** on that project. Ask for **Contributor** access.

Resolve a comment

You're a **Viewer**. You can still comment and reply; resolving needs the **Contributor** role.

Rename or delete a project, or change access

That needs the **Manager** role.

You're trying to...	...but can't, because
Copy a design into a project	Adding a design to a project needs the Manager role on that project. Any role on the design's own project is enough to copy from it.
Move a design	Moving needs the Manager role on both projects, because the design leaves one of them.
Edit a design someone else is using	It's checked out to them. You can still view it; the version history shows who has it.

How access is decided

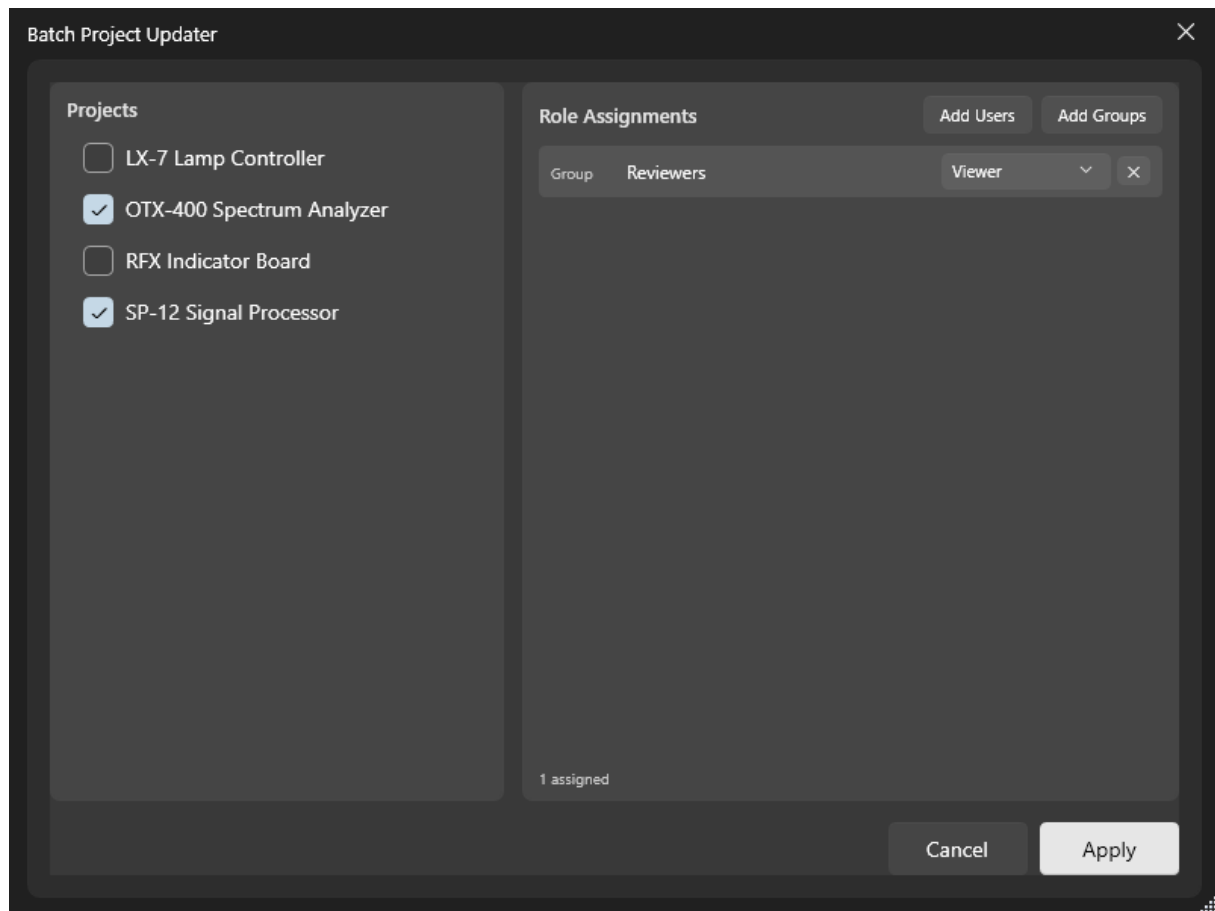
You can be given a role directly, or through a **group** you belong to — for example the **RF Team** group. If both apply, you get the more capable role of the two. Groups let administrators grant access to a whole team at once.

For Managers and administrators

If you manage a project, you control its access list from **Properties** — add people or groups and set each one's role. You can do the same from a web browser with **EEforce 365**, without the desktop app: see [Managing Access](#). Administrators can also change project access, users and groups in the [web admin](#).

Changing roles on several projects at once

Tools → Project Permission Manager opens the **Batch Project Updater**: tick the projects you manage, build the access list you want with the same editor as **Properties**, review the confirmation and apply. The list you build *replaces* the current access list of every ticked project — so include the people and groups that should keep access, not only the new ones.



To let *everyone* in your company view a project, a Manager can add the built-in **All Users** group as a Viewer. Leave it off to keep the project private.

Previewing Designs

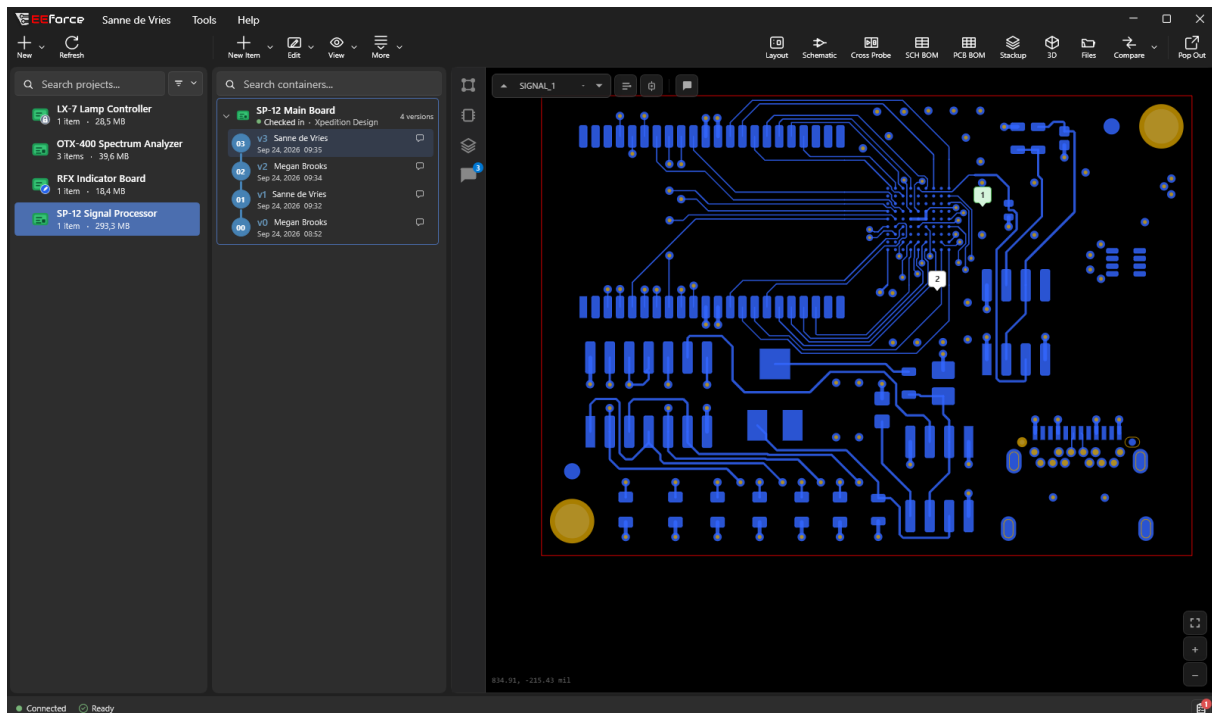
Inspect a board with **high-fidelity vector previews** of its layout and schematic, without opening Xpedition or PADS Professional. Select a design and a saved version, then choose a view: layout, schematic, cross-probe, 3D, parts list, or the board's specification.

Nothing is checked out and nothing is changed. Previewing is completely safe, and anyone with access to a project can do it.

⋮ tip In a browser? You can also review and compare designs with **EEforce 365** — the same viewer, no installation, no licence seat. See [Reviewing in the Browser](#). ⋮

How to preview a design

1. Choose a **project** on the left.
2. Choose a **design** in the middle. (You can also click it again to open its history and choose a specific **version** — you'll preview exactly that version.)
3. Click one of the **preview buttons** in the top-right corner.



The preview buttons light up only when that information is available for the design you picked. If a button is greyed out, that view simply wasn't included when the design was checked in.

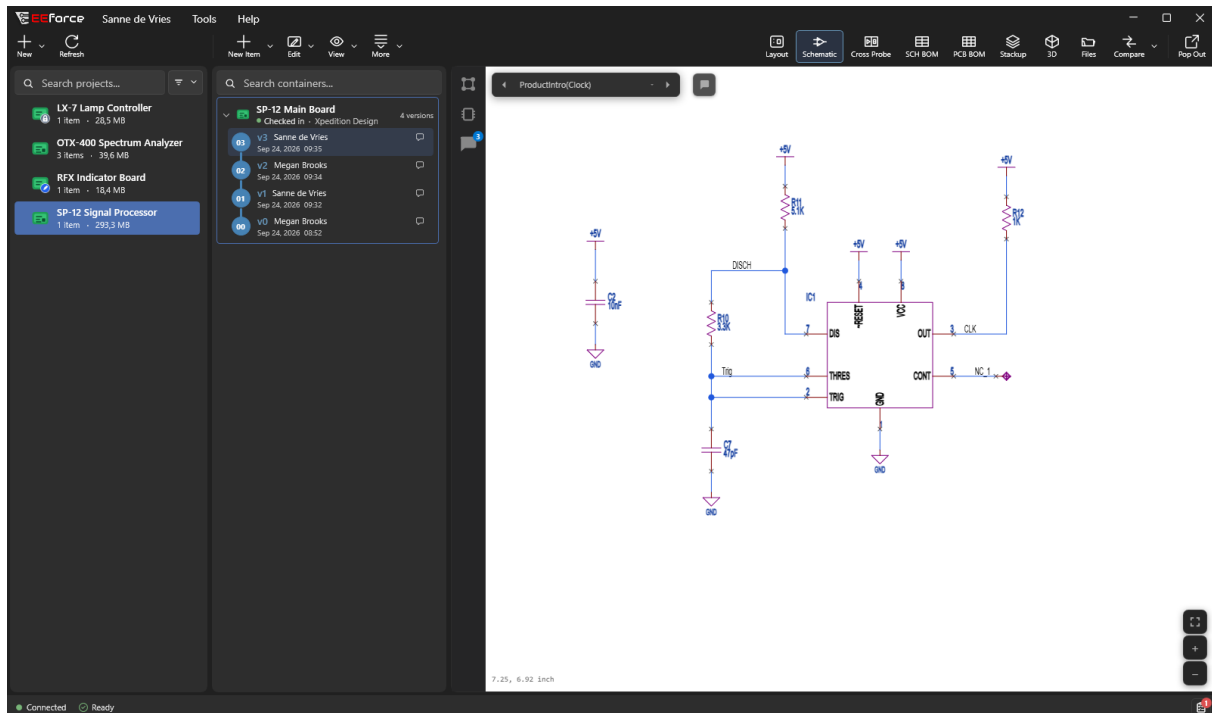
The views

Layout

A vector view of the physical board: copper, components, pads, and the board outline. Zoom in to inspect fine details while keeping lines and shapes crisp. Use the layer selector at the top to switch between copper layers (the **↑** and **↓** keys do the same), and the buttons on the bottom-right to fit the board to the window (**Fit All**) and zoom. Scroll to zoom; drag with any mouse button to move the board around. The coordinates under the pointer show in the bottom-left corner.

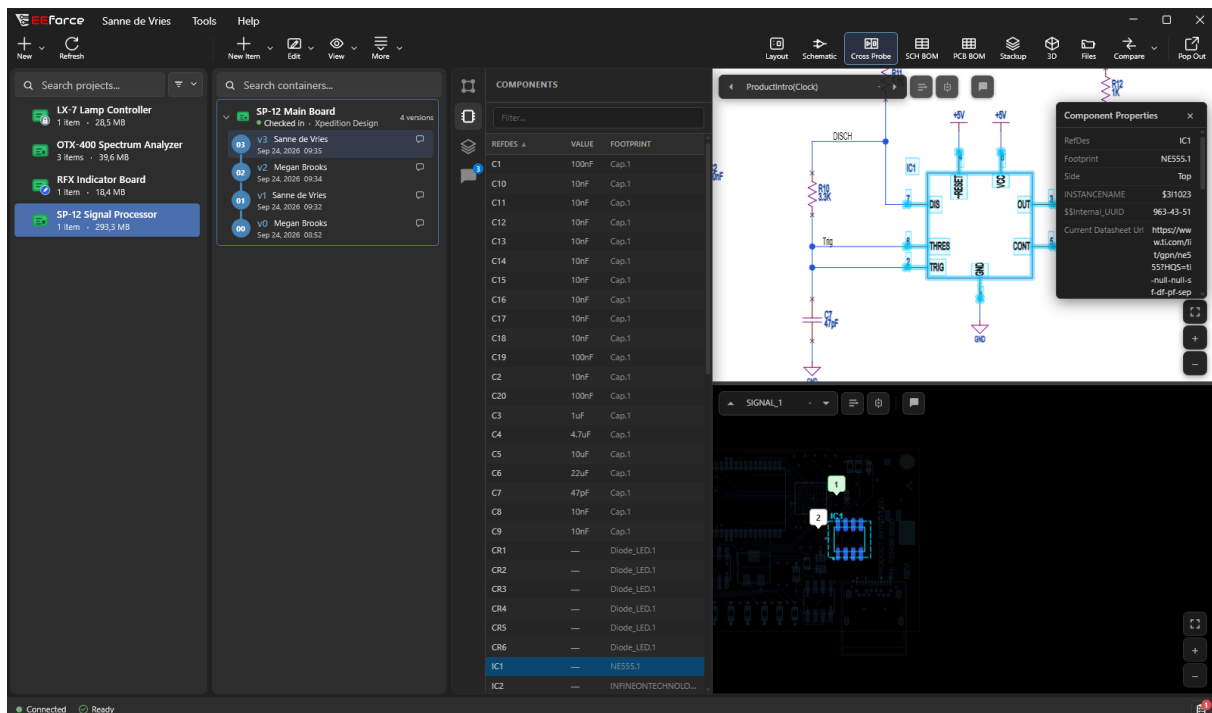
Schematic

The circuit diagram, each page on its sheet. If the design has more than one page, use the selector at the top to move between them.



Cross Probe

Schematic and layout together, one above the other — handy for finding where a part on the schematic sits on the board. Whatever you select in one view is selected in the other.



To give either view a screen of its own, click **Open in a new window** in that view's toolbar. The window stays cross-probed with the main window: a selection in one shows in the other. Its **Back to the cross-probe page** button closes it and puts the view back. EEforce remembers where you put each window, and closes them when you close the preview.

Bill of Materials

Two parts lists are available: **SCH BOM** (from the schematic) and **PCB BOM** (from the board). Each is a sortable, searchable table:

- **Filter...** finds a part.
- **Group by** makes one line per value of a column — for example one line per part number — with its parts listed and counted in **Qty**.
- The **Columns** menu chooses what's shown.
- **CSV** exports the list to a spreadsheet.

Parts nobody buys or places — parts the design excludes from the BOM, test points, fiducials, mounting holes, buried and mechanical parts and the like — are set apart at the bottom in a folded **Not on the BOM** section, and left out of the CSV.

BILL OF MATERIALS Filter...

#	REF DESIGNATOR	PART NUMBER	VALUE	CELL NAME
1	C1		100nF	Cap.1
2	C2		10nF	Cap.1
3	C3		1uF	Cap.1
4	C4		4.7uF	Cap.1
5	C5		10uF	Cap.1
6	C6		22uF	Cap.1
7	C7		47pF	Cap.1
8	C8		10nF	Cap.1
9	C9		10nF	Cap.1
10	C10		10nF	Cap.1
11	C11		10nF	Cap.1
12	C12		10nF	Cap.1
13	C13		10nF	Cap.1
14	C14		10nF	Cap.1
15	C15		10nF	Cap.1
16	C16		10nF	Cap.1
17	C17		10nF	Cap.1
18	C18		10nF	Cap.1
19	C19		100nF	Cap.1
20	C20		100nF	Cap.1
21	CR1			Diode_LED.1
22	CR2			Diode_LED.1
23	CR3			Diode_LED.1
24	CR4			Diode_LED.1
25	CR5			Diode_LED.1
26	CR6			Diode_LED.1
27	IC1			NE555.1
28	IC2			INFINEONTECHNOLOGIE_CYC1049GN30-1023X0.1
29	IC3			TEXASINSTRUMENTS_TPS62160DSGR.1

PCB BOM Filter...

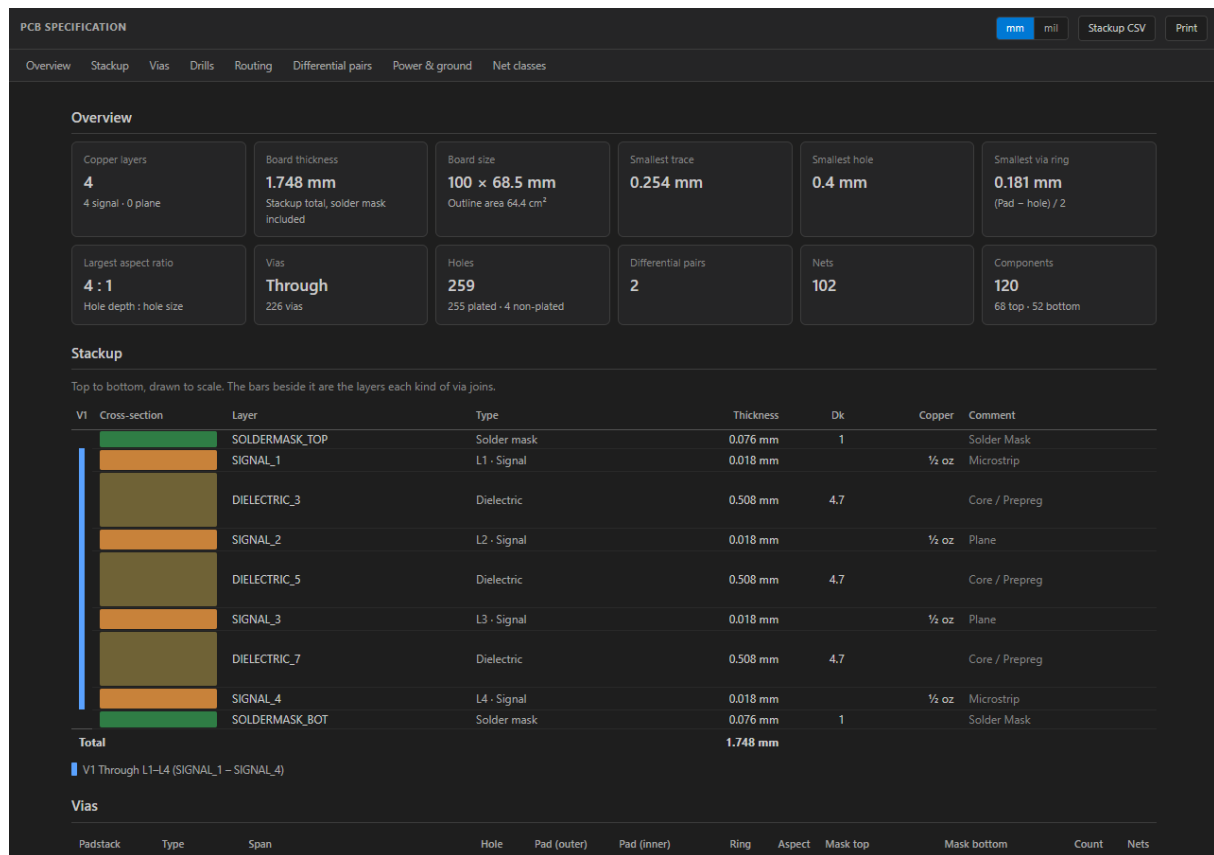
#	REF DESIGNATOR	VALUE	CELL NAME	PART NUMBER	SIDE
1	C1	100nF	CAPC160X080X27L35N_C1	2101-1044	Top
2	C2	10nF	CAPC100X050X55L30_C2	2101-1081	Bottom
3	C3	1uF	CAPC160X080X27L35N_C3	2101-1015	Bottom
4	C4	4.7uF	CAPC200X125X100L50N_C4	2101-1102	Top
5	C5	10uF	CAPC160X080X27L35N_C5	2101-1090	Bottom
6	C6	22uF	CAPC160X080X27L35N_C6	2101-1100	Bottom
7	C7	47pF	CAPC100X050X55L30_C7	2101-1113	Top
8	C8	10nF	CAPC160X080X27L35N_C8	2101-1008	Bottom
9	C9	10nF	CAPC160X080X27L35N_C9	2101-1008	Bottom
10	C10	10nF	CAPC160X080X27L35N_C10	2101-1008	Bottom
11	C11	10nF	CAPC160X080X27L35N_C11	2101-1008	Bottom
12	C12	10nF	CAPC160X080X27L35N_C12	2101-1008	Bottom
13	C13	10nF	CAPC160X080X27L35N_C13	2101-1008	Bottom
14	C14	10nF	CAPC160X080X27L35N_C14	2101-1008	Bottom
15	C15	10nF	CAPC160X080X27L35N_C15	2101-1008	Bottom
16	C16	10nF	CAPC160X080X27L35N_C16	2101-1008	Bottom
17	C17	10nF	CAPC160X080X27L35N_C17	2101-1008	Bottom
18	C18	10nF	CAPC160X080X27L35N_C18	2101-1008	Bottom
19	C19	100nF	CAPC160X080X27L35N_C19	2101-1044	Bottom
20	C20	100nF	CAPC160X080X27L35N_C20	2101-1044	Bottom
21	CR1		LEDC160X080X90L25N_CR1	6401-0001	Top
22	CR2		LEDC160X080X90L25N_CR2	6401-0001	Top
23	CR3		LEDC160X080X90L25N_CR3	6401-0001	Top
24	CR4		LEDC160X080X90L25N_CR4	6401-0001	Top
25	CR5		LEDC160X080X90L25N_CR5	6401-0001	Top
26	CR6		LEDC160X080X90L25N_CR6	6401-0001	Top
27	IC1		SOIC8P127_490X600X175L84X42N_IC1	6201-1085	Top
28	IC2		SOP44P80_1841X1176X120L50X35N_IC2	6201-1090	Top
29	IC3		SON9P50_200X200X80L40X247X220X60N_IC3	6201-1089	Bottom

PCB Spec

The board's specification on one page, ready to hand to a fabricator or a reviewer:

Section	What it shows
Overview	The board facts at a glance.
Stackup	Every copper, core and prepreg layer, top to bottom and drawn to scale, with the layers each kind of via joins beside it.
Vias	The via types — through, blind, buried and microvia — with their holes, pads, rings and aspect ratios.
Drills	The drill table, plated and non-plated holes.
Routing	Single-ended signal traces, per layer.
Differential pairs	Each pair's width, gap and how much of its length the two traces run together.
Power & ground	Power and ground nets, and nets that fill copper areas.
Net classes	The design's net classes.

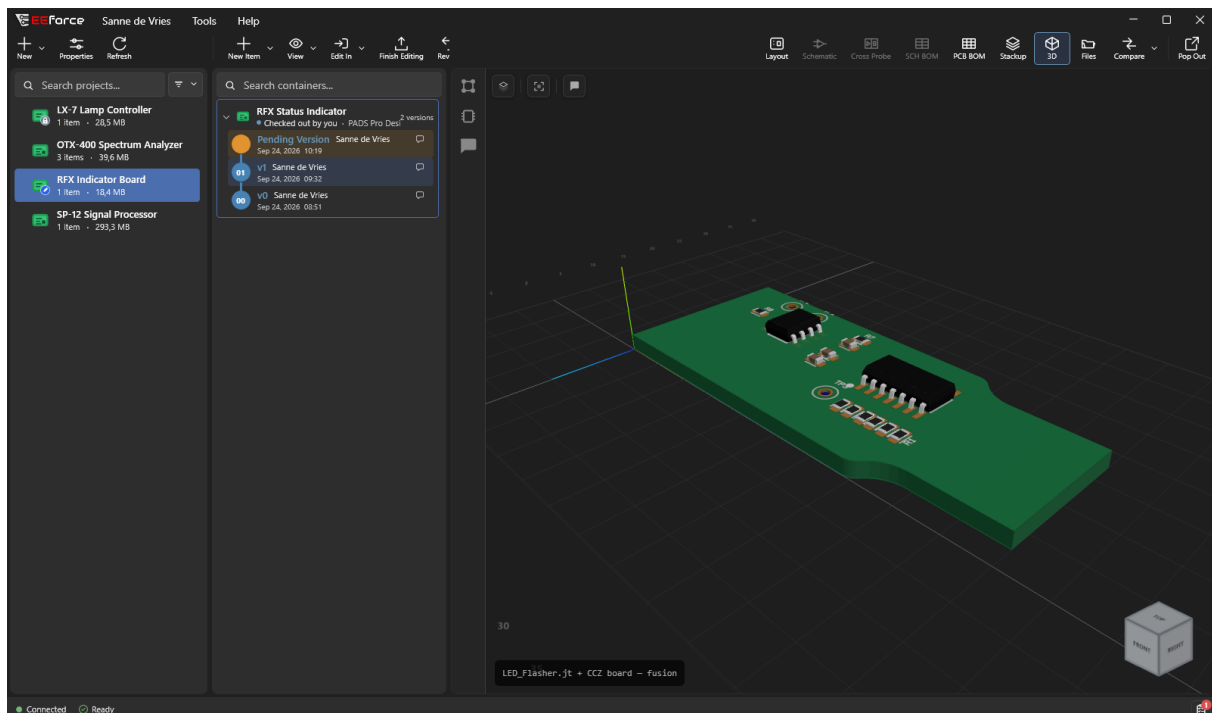
Impedances are estimated from the stackup; use your fabricator's stackup calculation for the real values. Switch between **mm** and **mil** at the top (your choice is remembered), download the stackup with **Stackup CSV**, or click **Print** to print the specification or save it as a PDF.



3D

A rotatable, full-colour 3D model of the assembled board. Drag to spin it, scroll to zoom, and use the cube in the corner to snap to a standard view (top, front, right). The buttons at the top:

- **3D**, **2.5D** and **Off** show the components as their 3D models, as their placement outlines raised to their height, or not at all — the bare board. **C** switches the components off and back. **3D** needs the version to carry the parts' 3D models.
- **Reset to Top View** and **Fit to Screen** bring the board back into view.
- The arrows turn the board a quarter turn either way, or turn it over (**F**).



Selecting and inspecting

Click anything on the layout or schematic to select it; there are no modes to switch:

- a trace, wire or via selects its **net**
- a pin, a pad, a component's lines or label — or anywhere inside its outline or symbol — selects the **component**
- a copper pour selects its net, unless a part sits on top of it

Click the same spot again to take the next thing there: a pad first gives its part, then its net. While you hover, EEforce outlines what a click would pick and, when the pointer rests, names it and what a further click would take.

What you select is highlighted across all visible layers and, on the cross-probe page, in the other view too. Selecting one net of a differential pair highlights both. **Double-click** zooms to the selection; **Esc** clears it.

The **properties** panel in the top-right corner shows what the design knows about the selection — a component's value, part, footprint, location, side, rotation, pins and parameters; a net's class, pins, connections and the traces, vias and copper areas it is made of, each with **Zoom to it**. Its arrows step back and forward through what you selected before. Minimize the panel to keep only its header out of the way; it stays minimized until you restore it.

Measuring

On a board, click **Measure** (or press **M**), then click two points. The distance reads in mm above the line and in mil below it. A click snaps to the centre of a pad or via or the end of a track; hold **Ctrl** to place a point freely. The next click starts a new measurement, and **Esc** clears the line — pressed again, it turns the tool off.

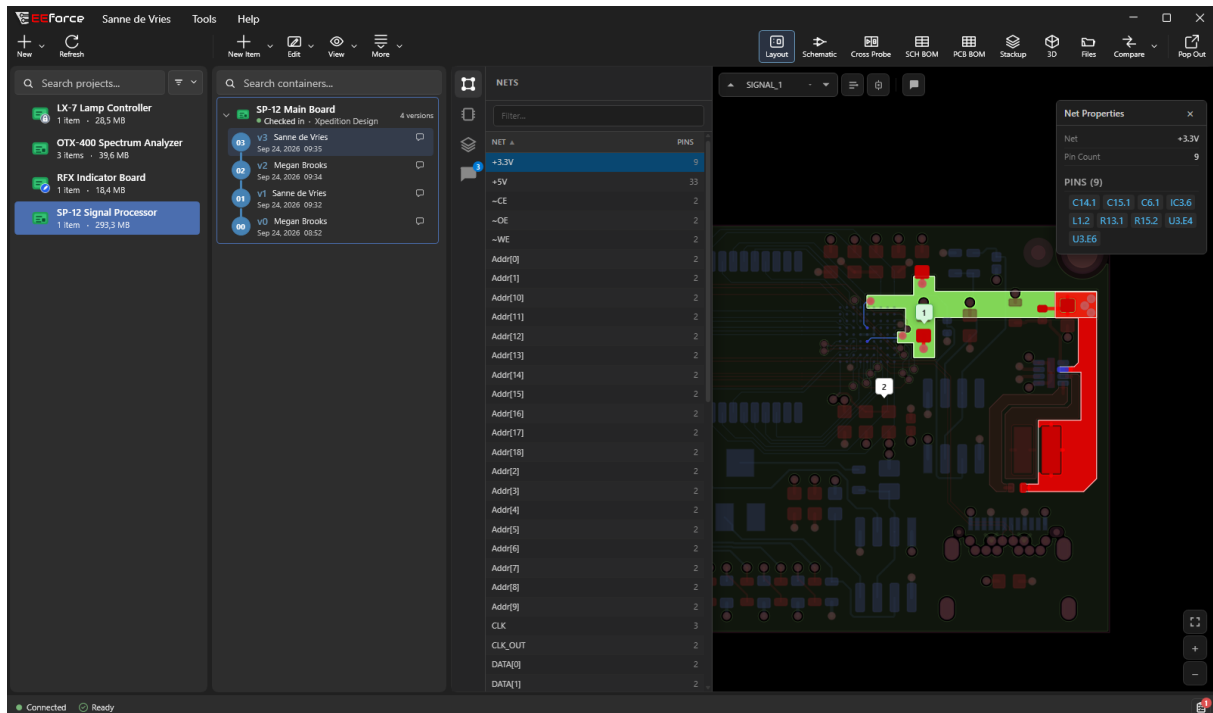
Assembly variants

If the design has assembly variants, a variant picker appears at the top of the views. **All components** is the design as drawn. Choose a variant to see what it fits: the schematic crosses out what the variant leaves off, the board greys it out, the 3D board hides it, and the BOMs list it apart under **Not fitted**. Your choice applies to every view and is remembered for the project.

The side panels

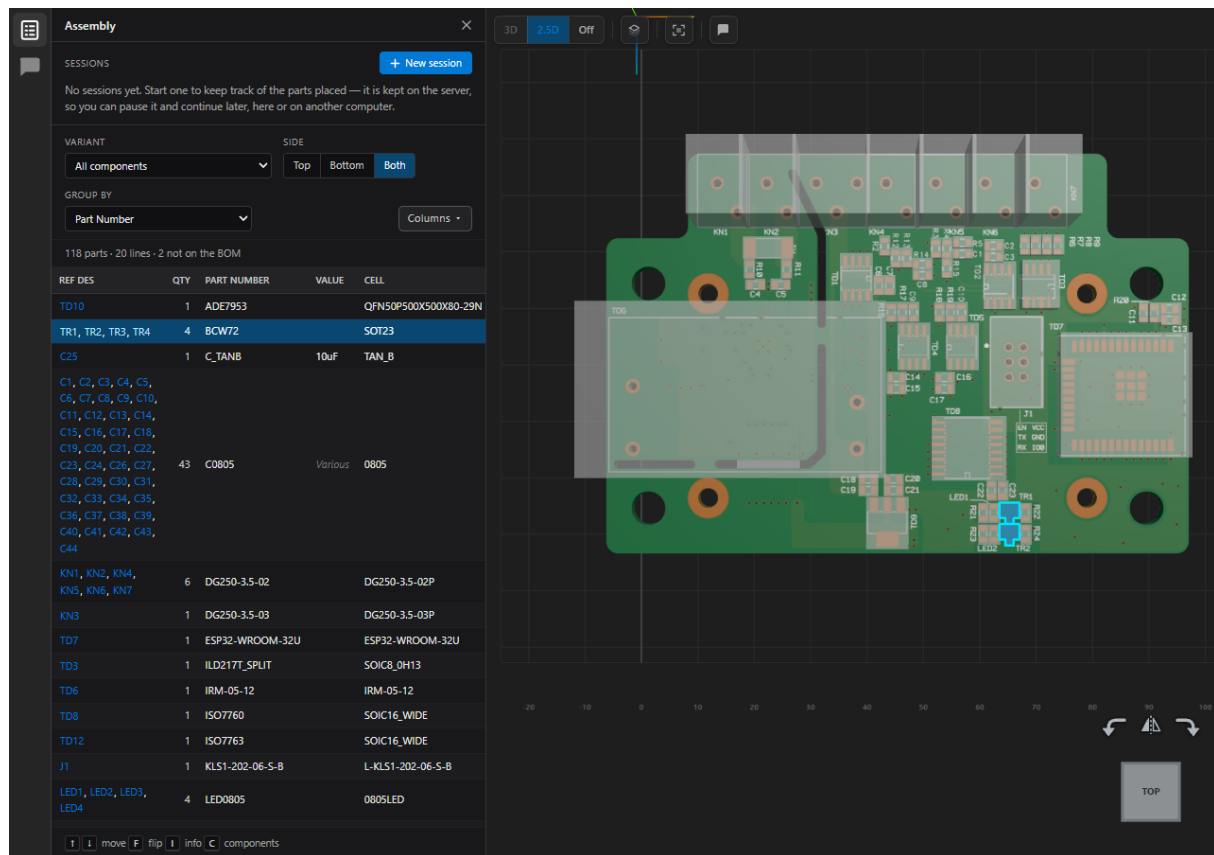
The icons along the left edge of the viewer open the panels that go with the current view:

Panel	What it's for
Layers	Show, hide and solo individual layers.
Components	The parts placed on the board — click one to highlight it.
Nets	Every net in the design — click one to highlight its routing and pins and see its properties.
Comments	The discussion on the design. See Reviewing Designs Together .
Assembly Assistant	In the 3D view: the BOM beside the board, for building it part by part (see below).
Differences	Shown while comparing — what changed on each side.
Compare Assistant	Shown while comparing layouts — lining the two up. See Comparing Designs .



The Assembly Assistant

The **Assembly Assistant** puts the board's BOM beside the 3D board, to guide hand assembly or a first-article inspection. Open the 3D view and click **Assembly Assistant** on the left edge.



- Choose the **Variant** to build, the **Side** (**Top**, **Bottom** or **Both**), and optionally **Group by** a column to get one line per part number. The **Columns** menu chooses what else is shown; **Ref Des** always comes first.
- Click a line — or one reference in it — to see it on the board: the board turns to that side and zooms in, its parts light up and are outlined, the other parts turn grey and see-through, and parts the variant doesn't fit almost vanish.
- **↑** and **↓** step through the lines, **F** turns the board over, **I** shows the part's properties, and **C** switches the components off and back.

The panel remembers its columns, grouping, side and width.

Assembly sessions

To keep track of what has been placed, start a session: click **New session**, give it a name (for example *Lot 42 — board 3*) and a variant, and click **Start**. The session adds a **Status** column. Press **Space** to mark the current part done or **Esc** to skip it — each moves on to the next part still to do — or click a status icon to change it.

Sessions are kept on the server, so a board can be built over several days and from any computer, and the whole team sees the progress. **Pause** stops marking until someone clicks **Continue**; **Complete** finishes the session, and **Reopen** takes it up again. The list shows every session of the version with how far it has got and who worked on it last. Anyone who can view the project can start a session; whoever started it, or a project Contributor or Manager, can rename or delete it.

Files, and designs without a picture

The **Files** button shows the files inside the selected version, so you can open or download a single file without checking anything out. Some designs have no picture to show, for example a **Generic Container** of documents or a board checked in without a preview. For those, EEforce opens the file list straight away. See [Browsing & Downloading Files](#).

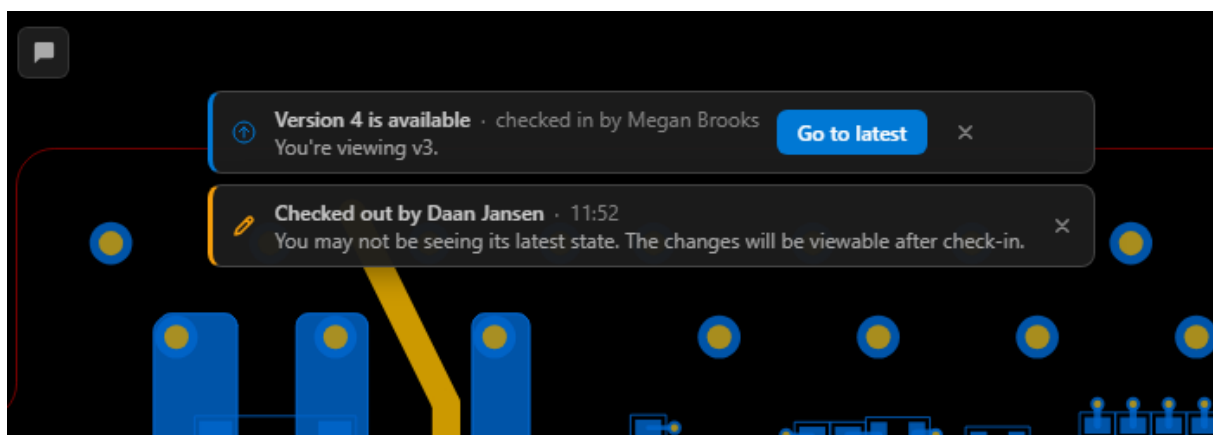
Discussing what you see

In the **Layout**, **Schematic**, **Cross Probe** and **3D** views you can pin comments directly onto the design, mark an area and sketch on top of it, and in the BOM views you can comment on a part. It's a running, visual conversation instead of a screenshot in an email. See [Reviewing Designs Together](#).

When the design changes while you look

While you have a design open, EEforce keeps it up to date. If a teammate checks in a new version, the design list refreshes on its own, so you don't need to reload anything. The **connection indicator** at the bottom-left shows you're connected and receiving those updates. See [Staying Connected](#).

The viewer also tells you when what you're looking at may no longer be the whole story:



- **Version 4 is available** — someone checked in a newer version while you had this one open. Click **Go to latest** to switch to it.
- **Checked out by a colleague** — someone is editing the design right now. You may not be seeing its latest state; their changes become visible once they check in. When it's you, the notice reads **You have this design checked out**.

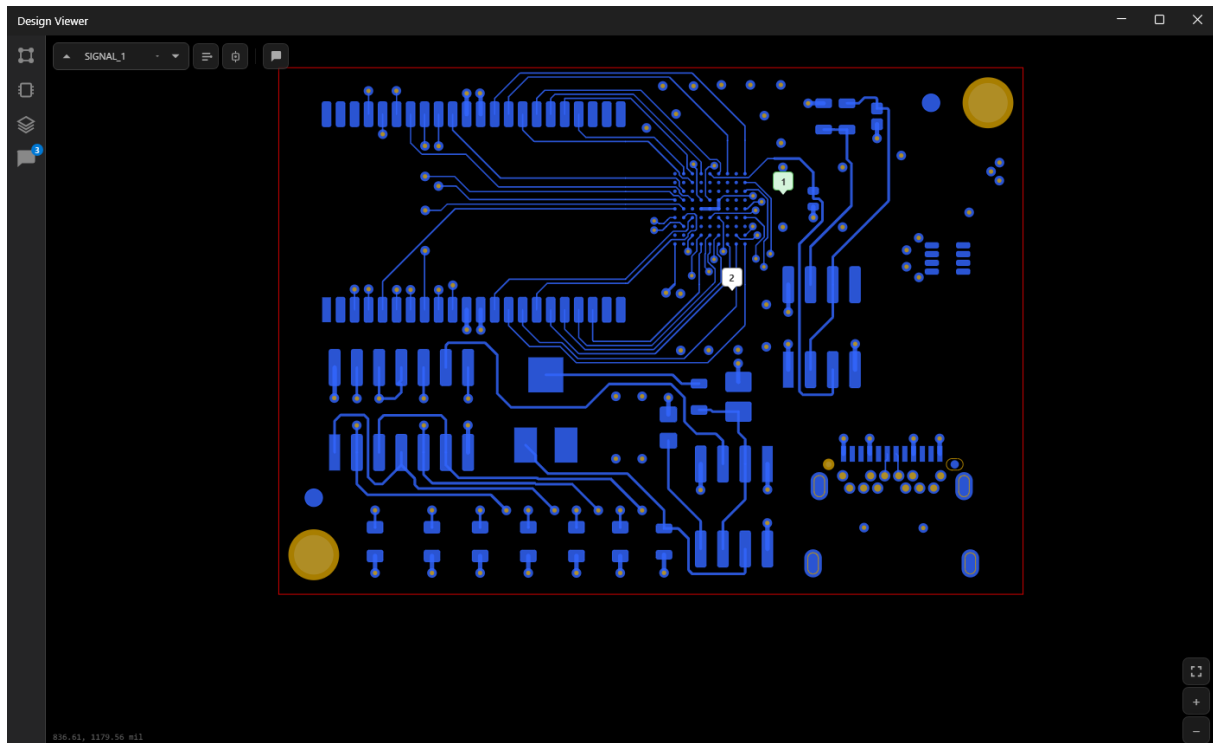
Click **×** on a notice to dismiss it. It comes back when something new happens, such as another check-in.

Comparing designs

Compare shows two versions of a design — or two different boards — on top of each other, with the differences marked. See [Comparing Designs](#).

Popping out

Pop Out opens the current preview in its own window — handy for putting a board on a second monitor while you keep working in the main window. On the cross-probe page you can also give each view a window of its own; see [Cross Probe](#).



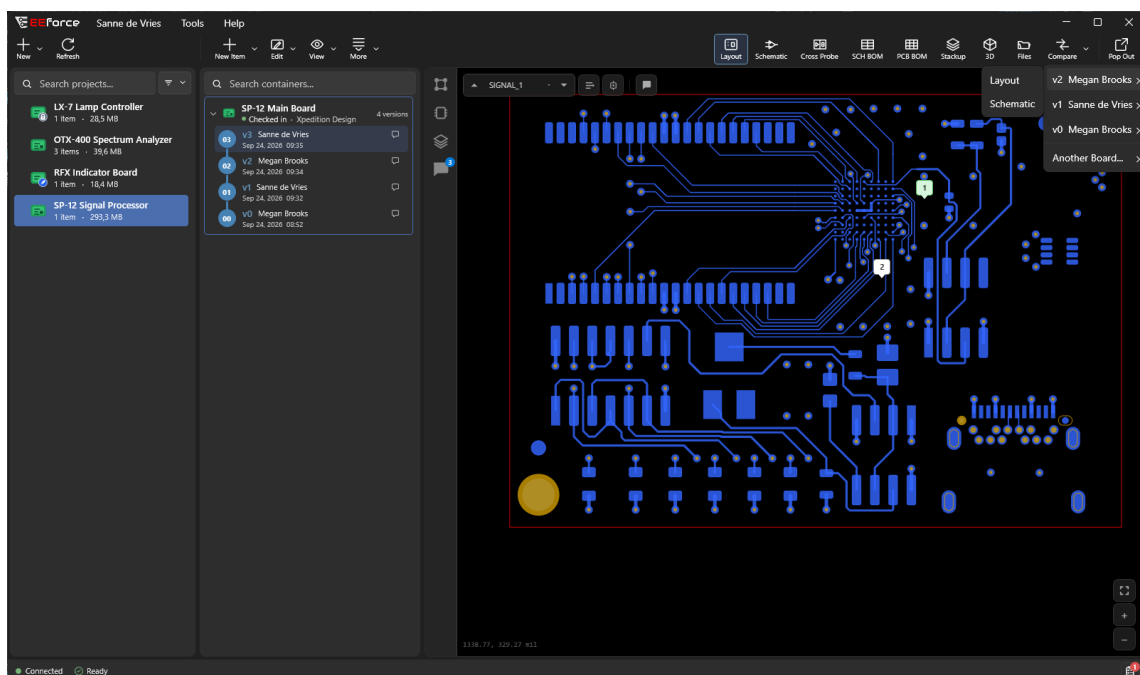
Comparing Designs

Compare shows two versions of a design — or two different boards — on top of each other, so you can see exactly what changed: what only the first side has, what only the second side has, and where they overlap.

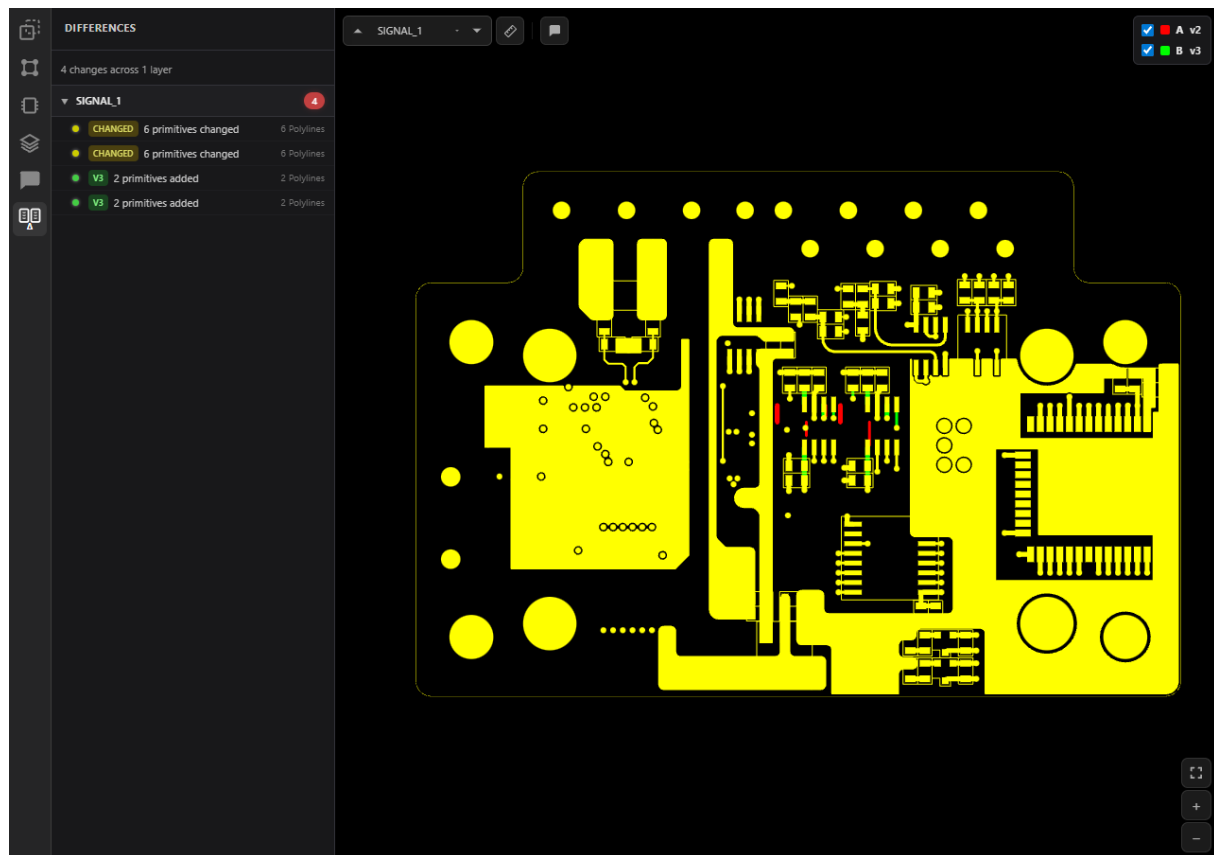
You can compare in the desktop app, and in a browser with [EEforce 365](#).

Comparing two versions of a design

1. Open the design and select the newer version.
2. Click **Compare**. The menu lists the design's other versions, with who checked each one in and its tag. Point at a version and choose **Layout** or **Schematic**: that is the view the comparison opens in. A choice is greyed out when one of the two versions has no preview for that view.



3. The viewer shows both versions in one picture.



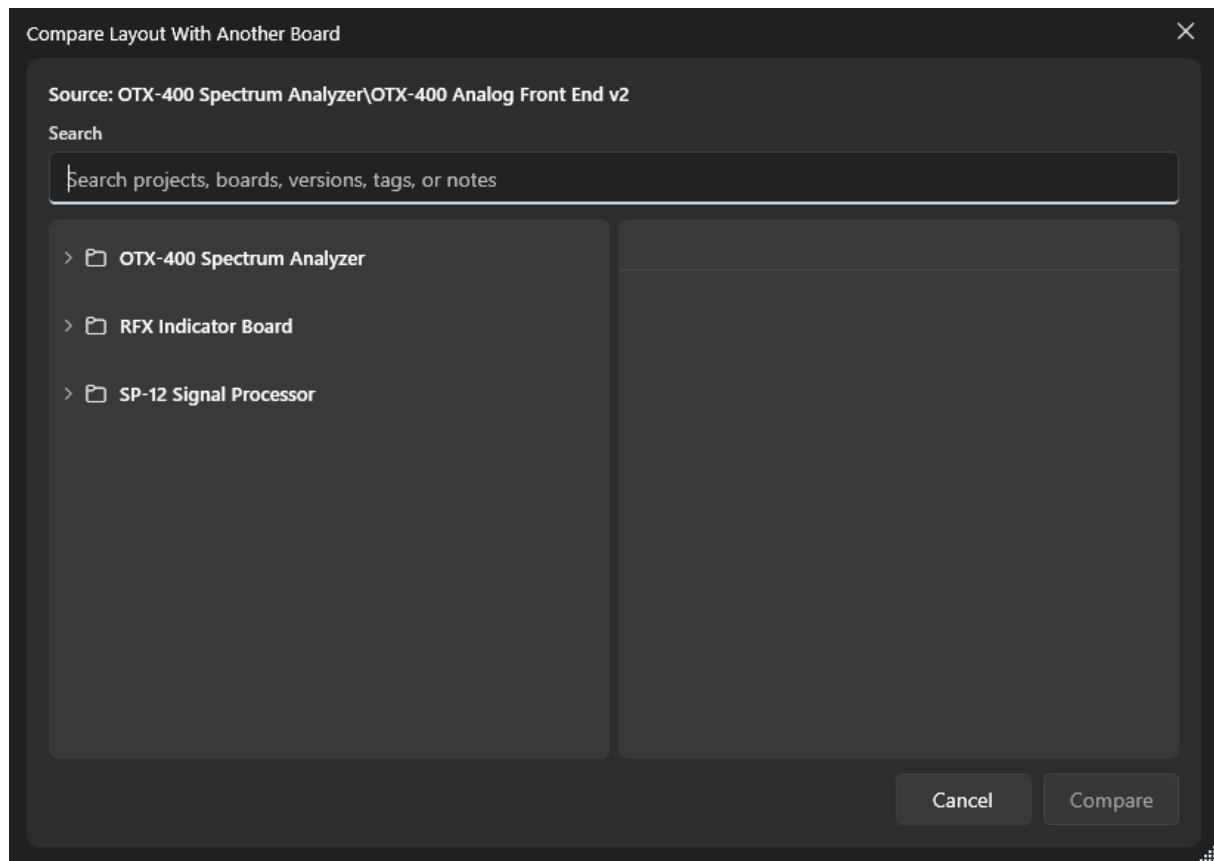
The legend in the top-right corner names the two sides — **A**, the older version, and **B**, the newer one — with their colours: red for what only **A** has, green for what only **B** has, and yellow where both draw the same. Untick a side to see the other one alone, or press **O** to switch between **A**, **A + B** and **B**. In the picture, a few clock-line traces were re-routed between v2 and v3.

The **Differences** panel on the left lists the changes layer by layer: what changed and what was added. Click one to zoom straight to it.

Comparing with another board

Compare → Another Board... compares the design with any other board you have access to, also in a different project.

1. Click **Compare → Another Board...**, then **Layout** or **Schematic**.
2. Find the board: type in the search box — it matches projects, boards, versions, tags and comments — or pick the board in the tree.
3. Click **Compare**.



Lining up two boards

Every layout comparison opens the **Compare Assistant** on the left. Two versions of the same board usually line up by themselves, but two different boards rarely sit at the same place in their files, and their layer stacks may differ. The Compare Assistant lines them up: **B** — the newer version, or the board you compared with — is moved over **A**.

Alignment moves and turns **B**:

1. Click **Pick points**, click a pad, via or track end of **B**, then click the point of **A** it belongs on. Clicks snap to pad and via centres and track ends; hold **Ctrl** to place a point freely. **Esc** steps back.
2. While you pick, both boards stay on screen. The **loupe (L)** shows the boards around the pointer, nearer.
3. Fine-tune by typing the offset and angle, or turn **B** a quarter turn either way about the point picked last.

A **moved** tag shows that **B** is no longer where its file puts it; the reset button puts it back.

Layer matching shows which copper layer of **B** is compared with each layer of **A**. EEforce matches

them automatically; change a match if you need to, and go **back to the automatic matching** at any time.

What's next

- **Previewing Designs** — the views explained
- **Designs & Versions** — where versions come from

Reviewing Designs Together

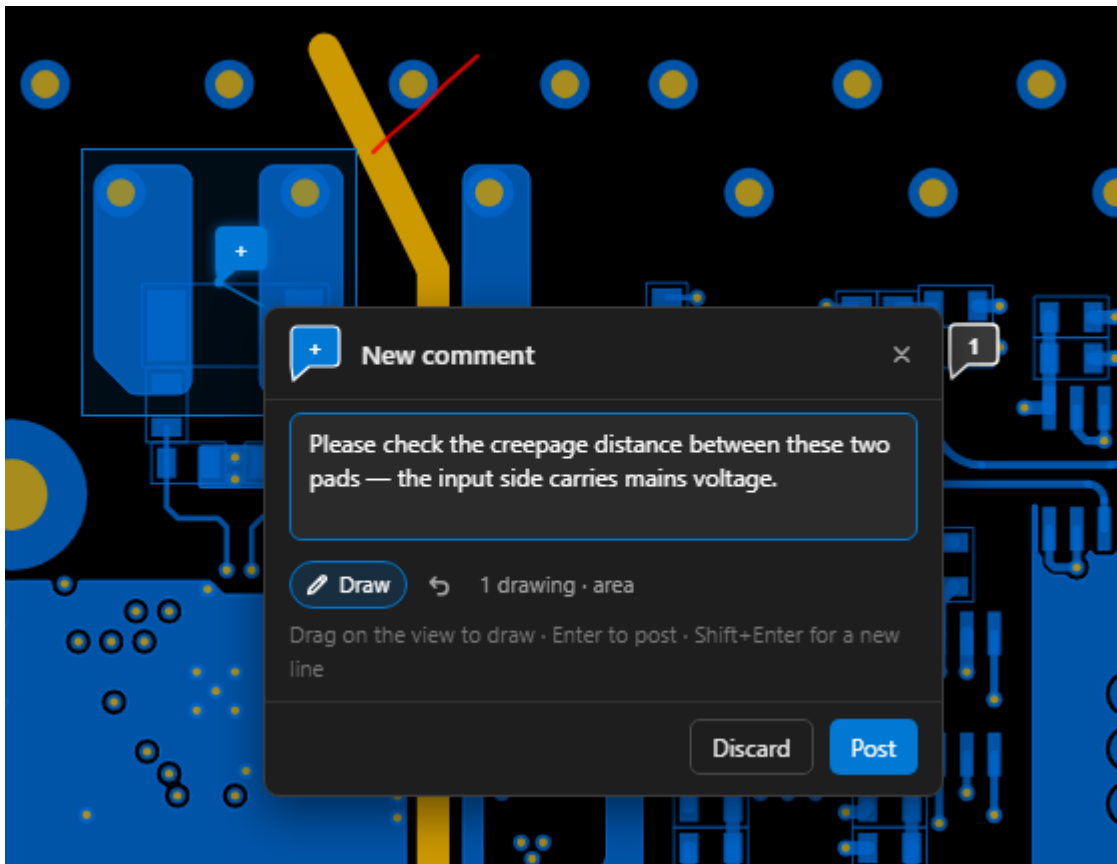
Instead of emailing screenshots back and forth, leave notes directly on the design. Drop a comment on the exact spot you mean, mark an area, sketch on top of it, and discuss it right there. Everyone who opens the design sees the conversation, in the EEforce app, in **EEforce 365** and in the **design tools** themselves.



This is separate from the short **check-in comment** you type when you check in a version (see **Checking Out & Checking In**). That one describes what changed. What's covered here is a running discussion that lives on the design itself.

Leaving a comment

1. Open a design in **Layout**, **Schematic** or **Cross Probe**.
2. Click **Add Comment Pin** (the speech bubble) in the viewer's toolbar.
3. Click the spot you want to talk about, or **drag** to call out an area. **Esc** cancels.
4. Type your note in the **New comment** box.
5. To make your point visually, drag on the view to draw. **Draw** is on from the start; the arrow takes the last stroke back.
6. Click **Post**, or press **Enter**. **Shift+Enter** starts a new line.



Your comment becomes a numbered marker on that spot, and EEforce keeps a snapshot of what you were looking at: the view, your drawings and the area. The context is never lost, even after the design changes.

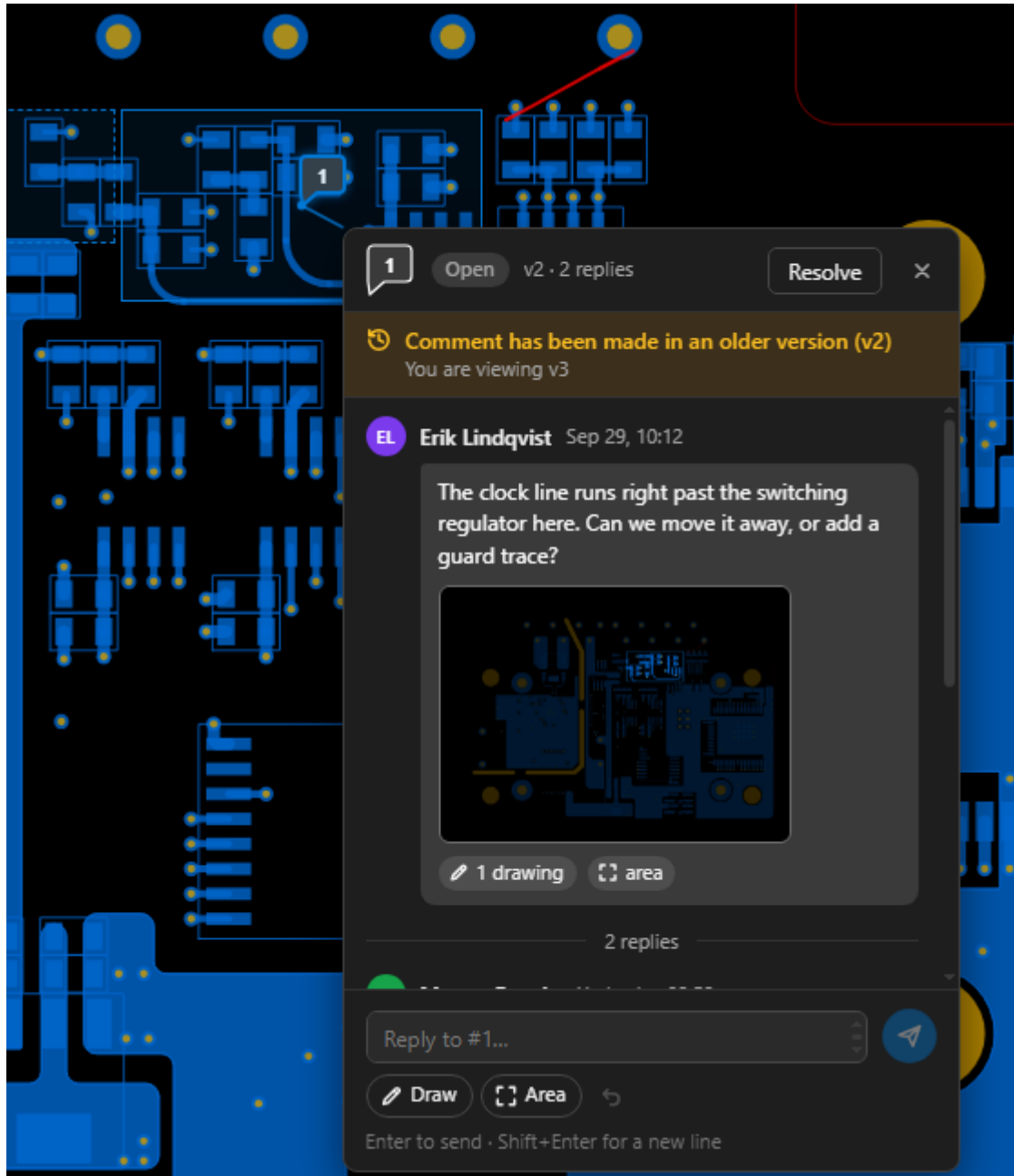
⋮ info 3D and BOM You can comment in the **3D** view too: click **Add Comment Pin** in the view's toolbar (or **+ Comment** in the Collaboration panel), then click the spot on the model. In the **SCH BOM** and **PCB BOM** views, every part's row ends in a small comment button: click it to comment on that part. Rows that already have comments show a speech bubble there instead. ⋮

Markers on the design

Each comment shows as a speech-bubble marker with its number. **Grey** markers are open, **green** ones are resolved. Click a marker to open its conversation. While it's open, the area the comment calls out is outlined, its drawings are shown, and a line connects the marker to the box.

The conversation

The box shows the comment and every reply as a message: who wrote it, when, the text, and the snapshot. Click a snapshot to see it full size. The header shows whether the thread is **Open** or **Resolved**, the version it was made on and the number of replies.



Comments belong to the design, not to one version. You see every comment whichever version you have open. When a comment was made on a different version, an amber note says so (*Comment has*

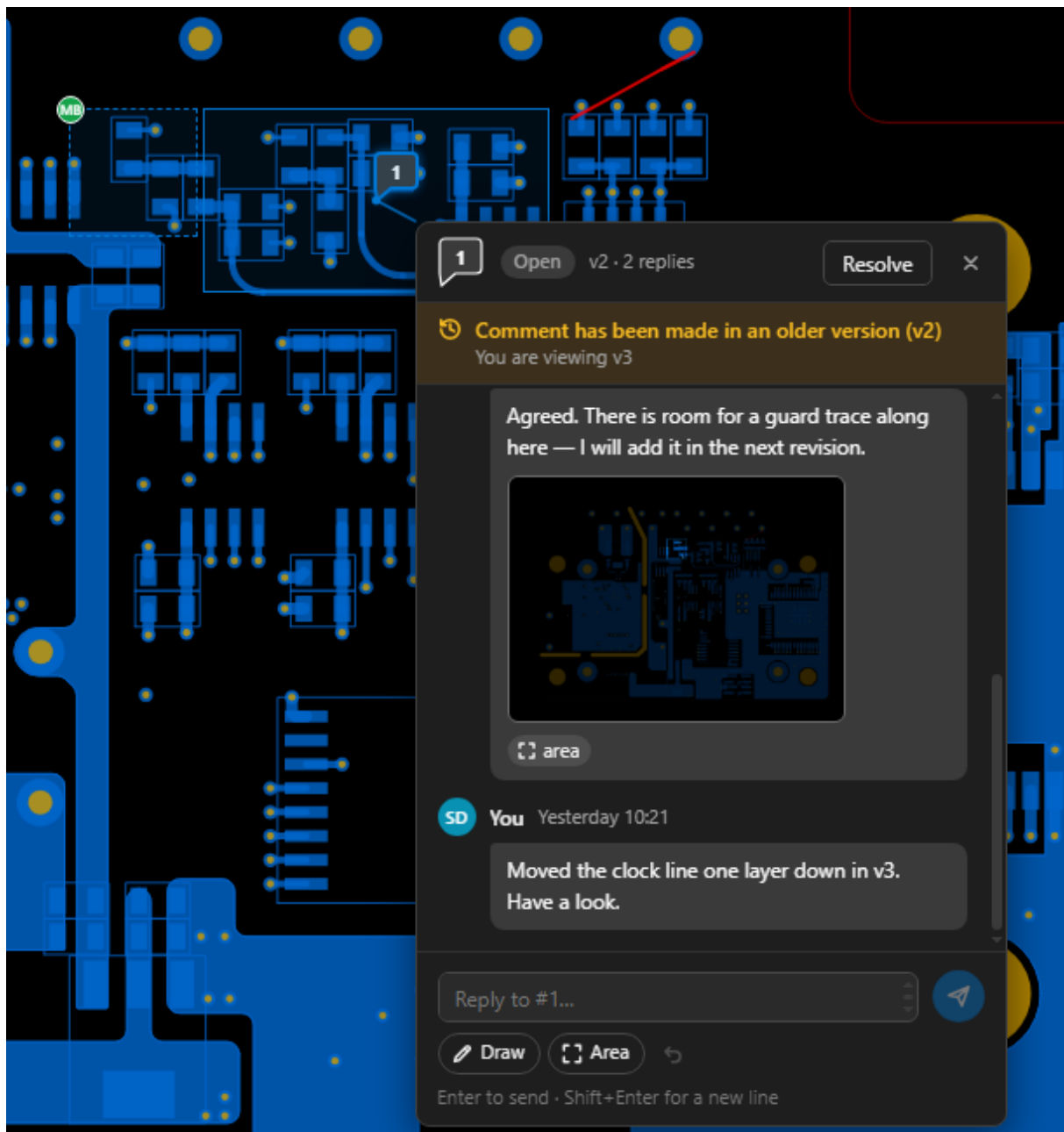
been made in an older version (v2)), together with the version you're viewing. Keep that in mind before you reply: the board may have moved on since.

Replying

Type in the box at the bottom and press **Enter** to send. A reply can carry its own picture, just like a comment:

- **Draw** — drag on the view to sketch into your reply.
- **Area** — drag on the view to mark the part of the design your reply is about.
- The arrow takes the last drawing back; × removes the drawings and the area.

A reply's area is outlined with a dashed line and carries the author's initials, so you can tell whose it is.



Your own messages are labelled **You**. A reply you have started but not sent is kept while you look at other comments.

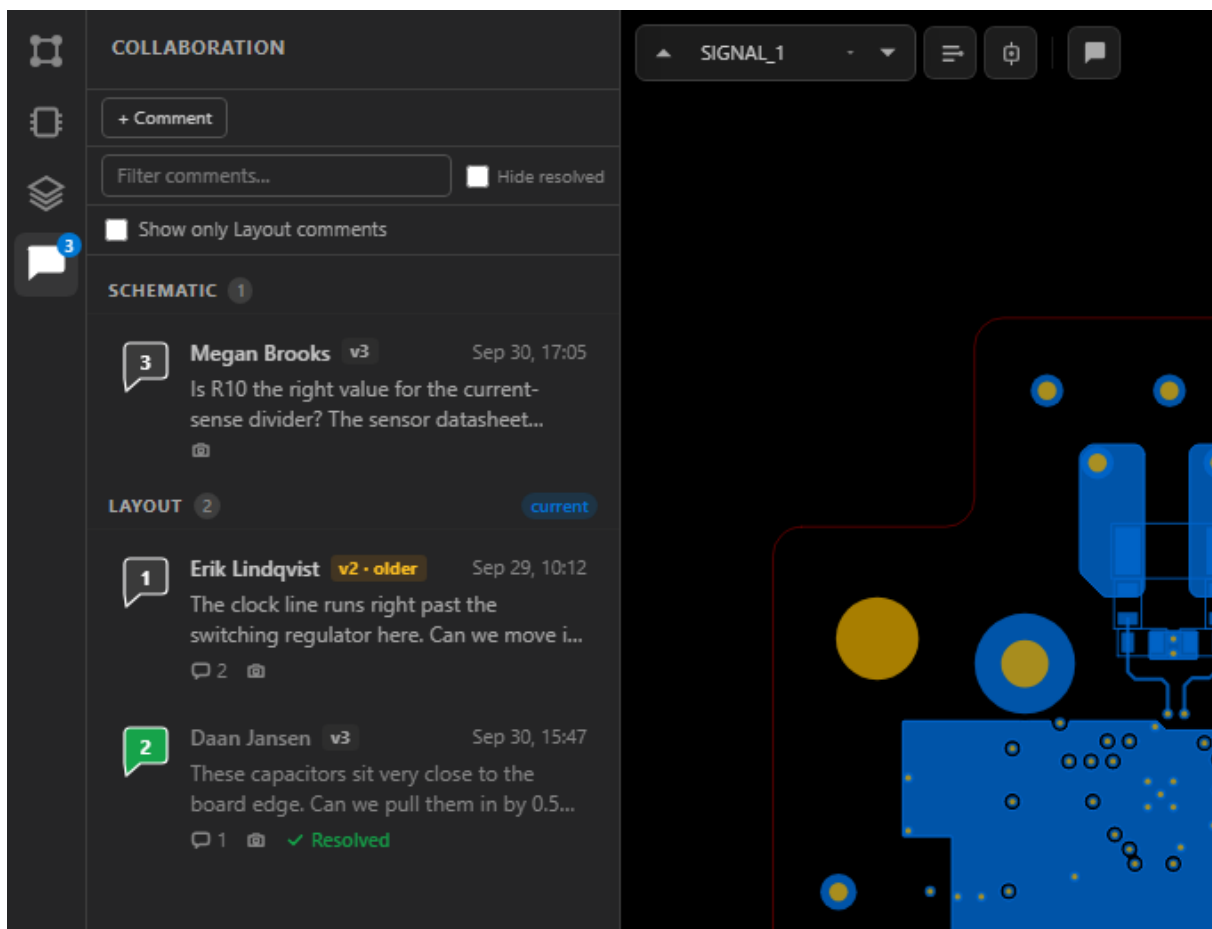
Resolving

When a point has been dealt with, click **Resolve** in the box's header. The marker turns green and the thread is marked **Resolved**. **Reopen** brings it back.

Resolving needs the **Contributor** or **Manager** role on the project. Viewers can read, comment and reply, but not resolve.

The Collaboration panel

Click the speech-bubble icon on the left edge of the viewer to open the **Collaboration** panel. It lists every comment on the design, grouped by view (**Schematic**, **Layout**, **3D** and **BOM**), with the view you're looking at marked **current**. The badge on the icon counts the comments.



Each card shows the comment's number, its author, the version it was made on, when it was written, the start of the text, the number of replies, and a camera icon when it has a snapshot. Resolved comments are marked **Resolved** with a green number. A version tag in amber, such as **v2 • older**, means the comment was made on another version than the one you have open.

- Click a card to jump straight to the comment, switching view if needed.
- **+ Comment** starts a new comment on the current view.
- **Filter comments...** narrows the list by text.

- **Hide resolved** hides resolved comments, here and on the views.
- **Show only Layout comments** (or Schematic, and so on) narrows the list to the view you're on.

A few things worth knowing

- **No special permission is needed to take part.** Anyone who can view a design can comment and reply, even with the **Viewer** role and a **Read-Only Project** banner. This does not apply when the server licence has expired and the entire server is in **read-only mode**.
- **You don't need the design checked out.** Comments work on any version, checked out or not, and never change the design itself.
- **Conversations update live.** If a teammate adds or answers a comment while you have the design open, it appears as it happens.
- **What's said stays said.** Once posted, a comment or reply can't be edited or deleted. That keeps the record of the review intact. Add a reply to correct or update a point.
- **The same conversation everywhere.** Comments made in the app show up in EEforce 365 and in the editors, and the other way round.

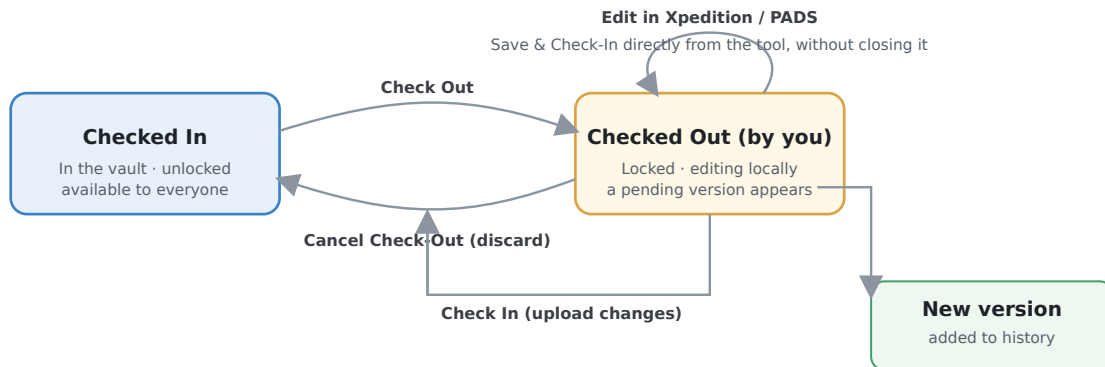
What's next

- **Working in Xpedition & PADS Professional** — read and add comments inside the design tool
- **Previewing Designs** — the views you can comment on
- **Comparing Designs** — check what changed before you reply

Checking Out & Checking In

When you're ready to actually *change* a design, not just look at it, you **check it out**, make your edits in Xpedition or PADS Professional, then **check it in** as a new version. EEforce makes sure only one person does this at a time, so no one's work is ever overwritten.

Design lifecycle — lock-based version control



Two states

A design is always in one of two states:

State	What it means
Checked in	Safely stored on the server. No one is editing it. Anyone can view it, and anyone with edit rights can check it out.
Checked out	Someone is editing it. It's locked to that person until they check it back in or cancel. Everyone else can still view it.

The design list says who has a design checked out, and when. A design you checked out on another computer reads **Checked out by you on** followed by that computer's name. See [Checked out on another computer](#).

Just looking? Use View instead

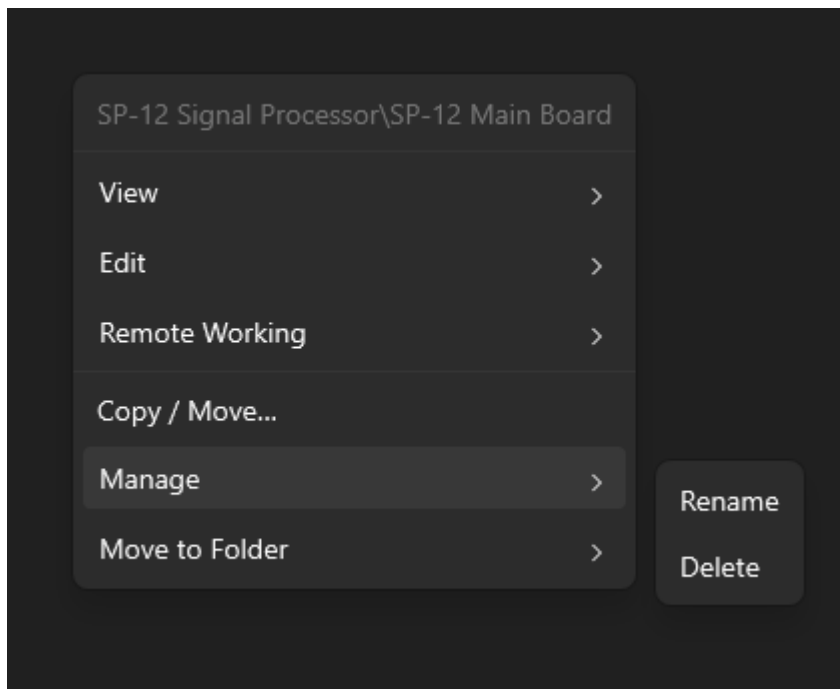
If you only need to *look* at a design in Xpedition or PADS Professional, not change it, right-click the design and choose **View**. This opens a read-only copy without locking anything, so other people can keep working. Most of the time the built-in **preview** is faster still and doesn't open a design tool at all.

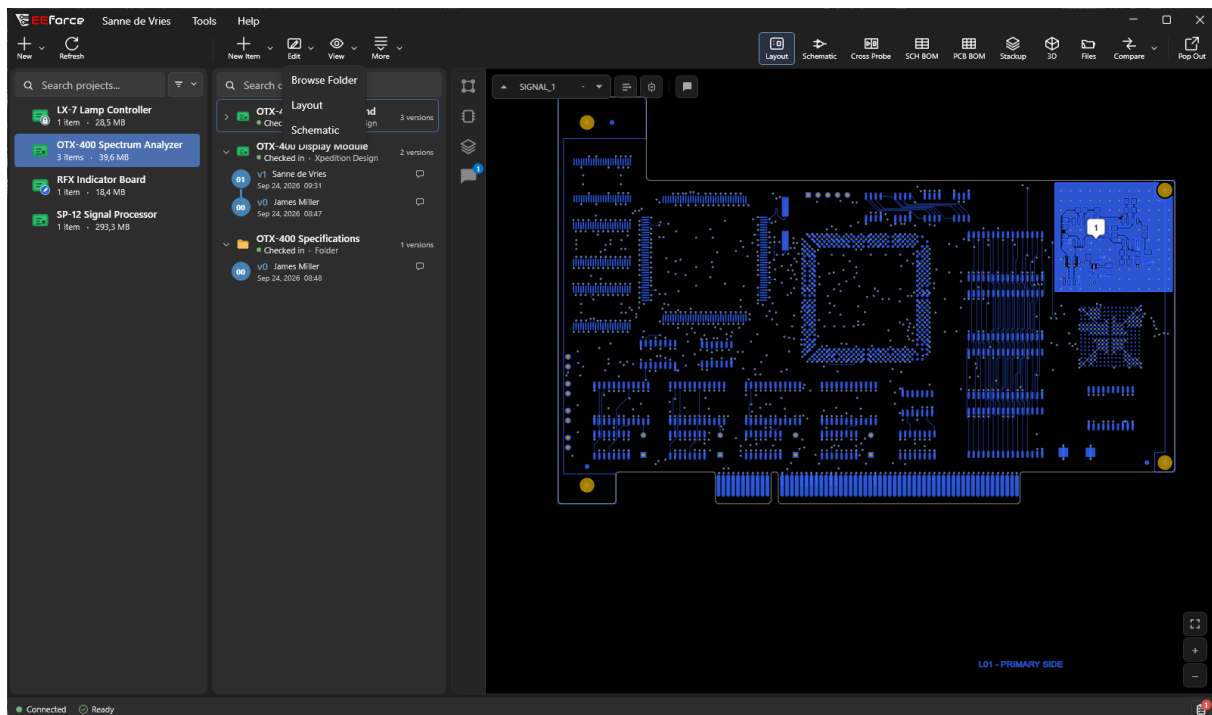
Checking out (start editing)

You need the Contributor or Manager role on the project, and the design must be checked in.

1. Right-click the design, or use **Edit** on the toolbar.
2. Choose **Edit**, then how you'd like to open it. **Folder Browser**, **Layout** and **Schematic** are always offered; Xpedition designs also get **Panel** and **Drawing**. PADS Professional doesn't have those last two.

A choice that can't work on your computer is greyed out; point at it to see why. **Panel** needs Fablink and **Drawing** needs the drawing editor installed, and a design made in the netlist flow — its schematic drawn in another tool — has no **Schematic** to open.

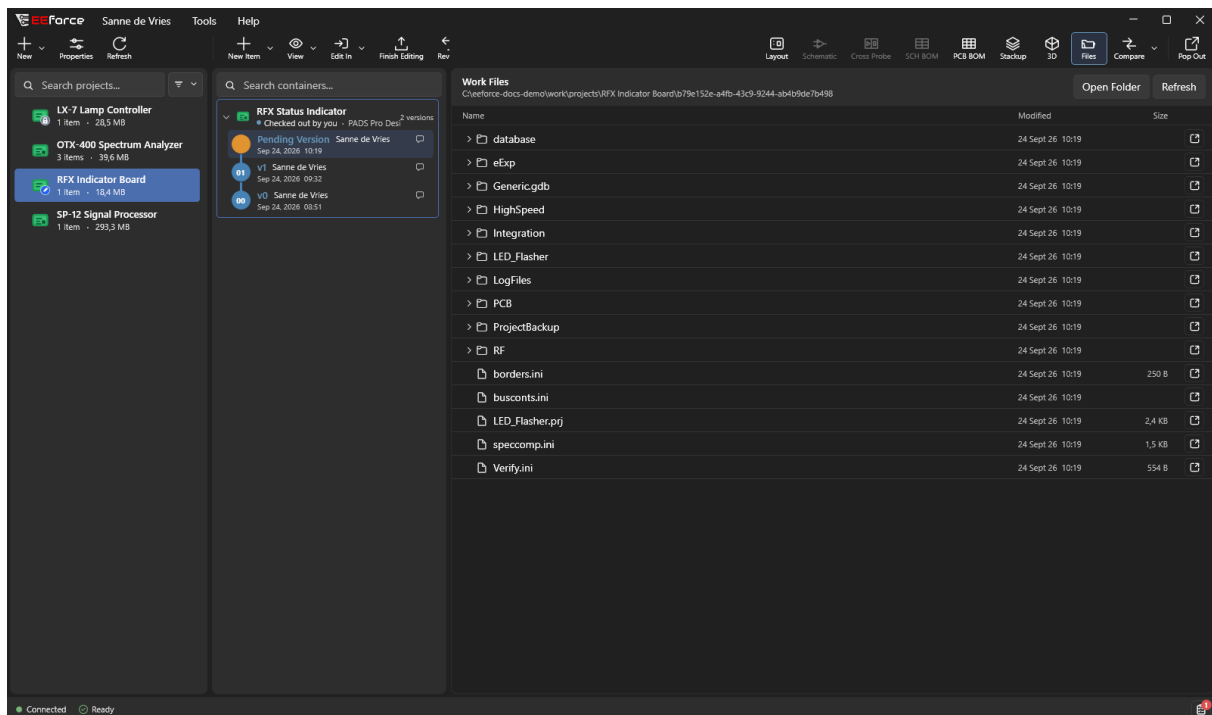




EEforce downloads the design to your PC and opens it. The status bar shows each step as it happens — **Download, Verify, Extract, Start Layout, Layout open** — and the editor then appears in the **Active editors** list at the bottom of the window. See [Following a check-out or check-in](#).

Once checked out, a few things change to show you're now editing:

- The design is marked **Checked out by you**.
- A **pending version** appears at the top of the version history. This is the new version you're building.
- The toolbar switches to editing actions: **Edit In** (open the design again, in another tool), **Finish Editing** and **Revert**.



In the editor, the **EEforce Companion** sits on the title bar. From there you can save versions and work with the team's comments without leaving the tool. See [Working in Xpedition & PADS Professional](#).

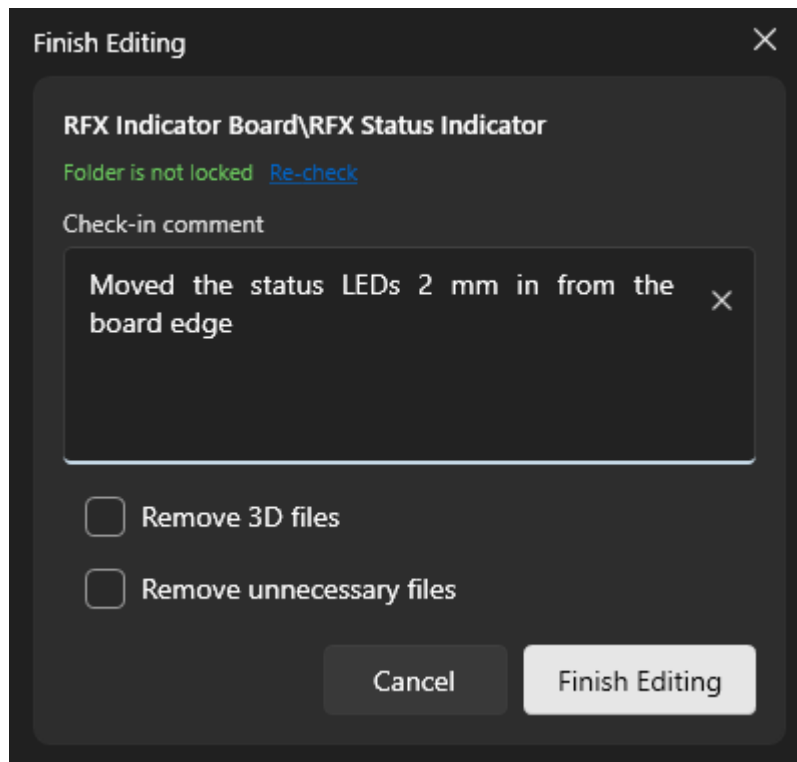


While you have a design checked out, no one else can edit it. Check it in or cancel as soon as you're done, so the rest of your team isn't waiting.

Checking in (save a new version)

When your edits are done:

1. **Close the editor.** For a layout, the Companion first offers to export the 3D model. Then the editor asks about saving, as it always does. See [Closing the editor](#).
2. **Finish Editing** opens by itself as soon as the editor has closed. (You can also click **Finish Editing** on the toolbar, or right-click the design → **Finish Editing**.)
3. Add a **comment** describing what you changed. It shows up in the version history and helps everyone understand the design's story.
4. Optionally tick **Remove 3D files** or **Remove unnecessary files** (log files, output files and other non-essential files) to keep the saved version lean.
5. Click **Finish Editing**.



EEforce prepares the previews, uploads your changes as a brand-new version and unlocks the design for everyone else. You can follow each step along the bottom of the window, and the finished check-in is listed in the **Activity Log** with every step's size and time.

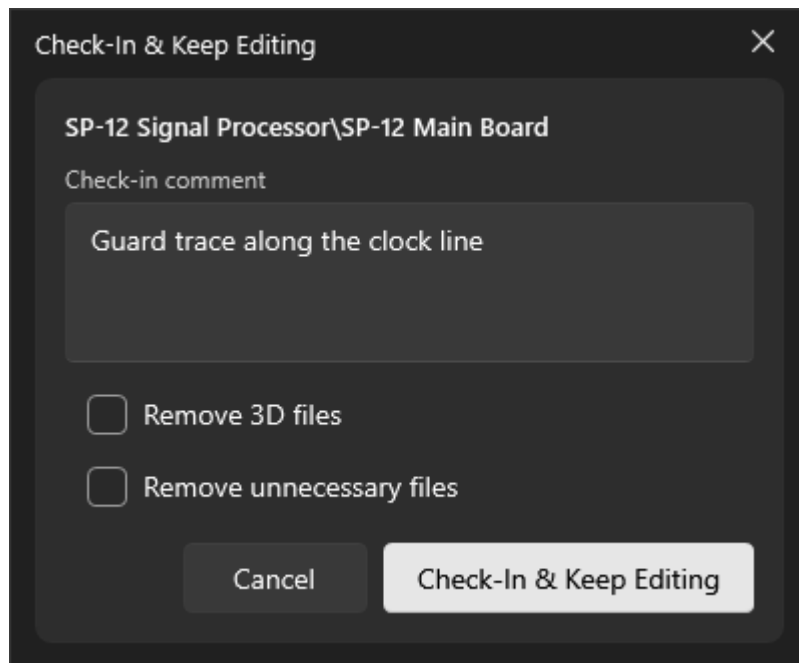
::: tip Close the editor first EEforce won't check a design in while an editor it opened still has the design open. It says *This command cannot be run while the object is open by editor* — close the editor and try again. The dialog also shows a **lock status**: if it says the folder is locked, something else still holds a file. Close it and click **Re-check**. :::

If a preview can't be prepared, the check-in still goes through, and the status bar says **Check-in completed without some previews**. The new version then lacks that view — for example **Schematic** — and the check-in's entry in the **Activity Log** says which preview is missing. Everything else is saved as usual.

Generic containers and **multi-board panels** have a shorter check-in window: just the comment.

Saving a version without closing the editor

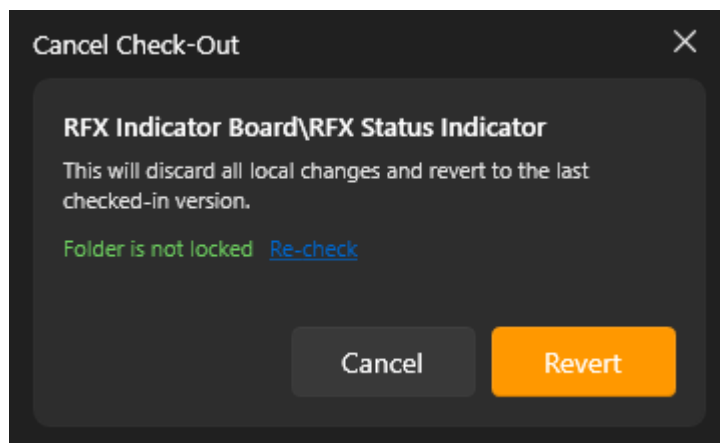
You don't have to close Xpediton or PADS Professional to save a version. Click **Save & Check In** on the Companion in the editor's title bar. EEforce saves the design, uploads it as a new version, and leaves the tool open and the design checked out to you, so you can keep going.



See [Saving a version without closing the editor](#).

Cancelling a check-out (discard changes)

Changed your mind? Right-click the design and choose **Cancel Checkout**. The toolbar's **Revert** button does the same. The dialog spells out what happens: *This will discard all local changes and revert to the last checked-in version*. It also shows the lock status, so you can re-check that nothing is still open in your design tool.



Reverting throws away everything you did since checking out and returns the design to its last checked-in version. No new version is created, and the design unlocks for everyone else.



Cancelling **permanently discards** your local changes. Only do this if you're sure you don't want to keep them.

Checked out on another computer

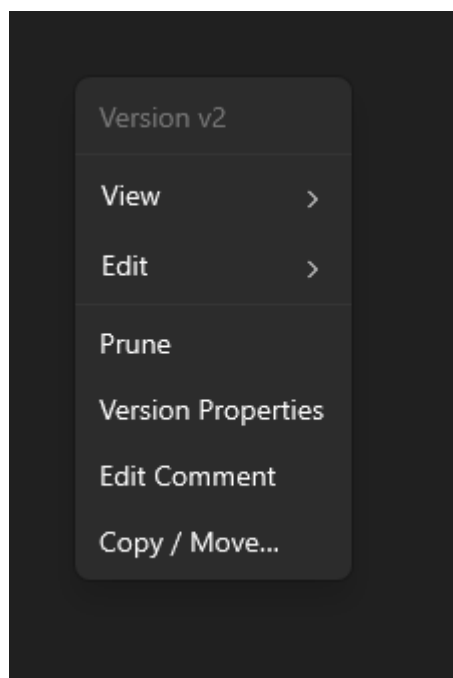
If you checked a design out on another computer (your laptop, say), EEforce shows it as **Checked out by you on** that computer. Its pending version explains that the working copy is on that machine and becomes a new version when it's checked in there. On this computer you can't edit it or check it in; the **Files** view tells you the working files are on the other machine.

To check it in, go back to that computer. If you no longer need those changes, you can release the design from here: right-click it → **Cancel Checkout** (or **Revert**). EEforce warns that this discards any changes made on the other computer. Choose **Cancel checkout** to go ahead, or **Keep** to leave it checked out.

Going back to an older version

Every check-in is kept. Select a design and click it again to see its history, then:

- **Select any version** to preview exactly how the design looked then.
- **Download** files from an old version without disturbing the current one. See [Browsing & Downloading Files](#).
- **Check out an older version** to base new work on it. Checking out a version that isn't the newest starts a **branch**: your next check-in is based on that older version, while the newer versions stay exactly as they are.



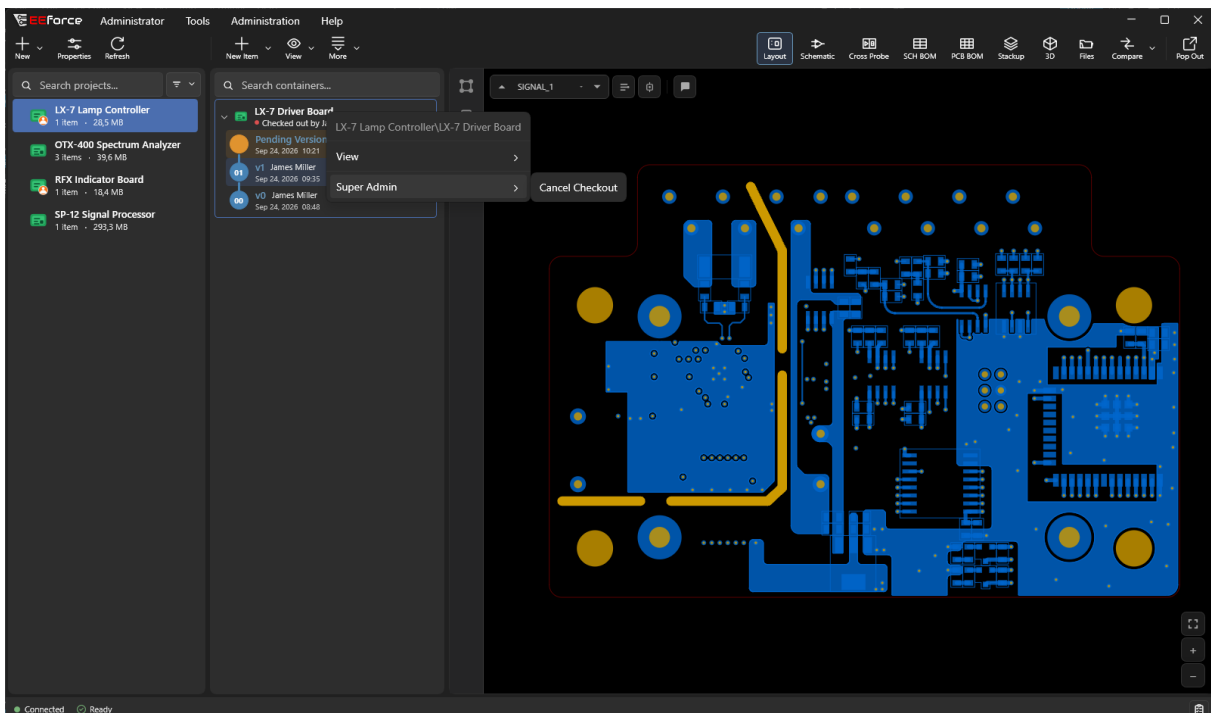
The version menu also holds the manager actions (prune, version properties and edit comment) and **Copy / Move...**, described in [Managing Versions](#).

If something goes wrong

Situation	What to do
“Design is locked” but you need to edit	Someone else has it checked out. The design list shows who. Ask them to check in, or ask an administrator to release it.
<i>This command cannot be run while the object is open by editor</i>	Close the editor that has the design open, then try Finish Editing or Revert again.
The lock won’t clear when checking in	Close every Xpedition or PADS Professional window that has the design open, then click Re-check in the dialog.
EEforce won’t close	EEforce stays open while editors it started are still running. Close them first. If you still have designs checked out, EEforce asks whether you really want to exit.

Situation	What to do
Your connection dropped mid-edit	Your check-out is safe on the server. Sign back in and it's still yours. See Staying Connected .

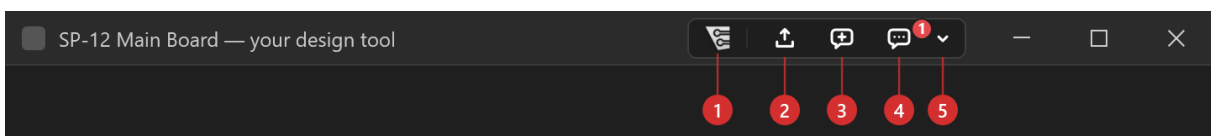
⋮ info If a check-out gets stuck If someone has left a design checked out and can't release it (they are away, or have left the company), the server's built-in administrator account can release it: right-click the design and choose **Super Admin** → **Cancel Checkout**.



⋮

Working in Xpedition & PADS Professional

When EEforce opens a design in **Xpedition** or **PADS Professional**, it brings a small toolbar along: the **EEforce Companion**. It sits on the editor's title bar and lets you save a new version, read the team's comments and add your own, all without leaving the editor.



zoomable width=720}

The Companion appears on every layout or schematic editor that EEforce starts for you, from **Edit**, **Edit In** or **View**. There is nothing to install or set up in the design tool itself. It works the same in Xpedition and PADS Professional, in Layout and in the schematic editor.

::: info The picture above is a sketch To keep the focus on EEforce, the screenshots on this page show the Companion on its own. In your design tool it sits in the title bar, just left of the minimise, maximise and close buttons, and follows the window wherever you move it. :::

The toolbar

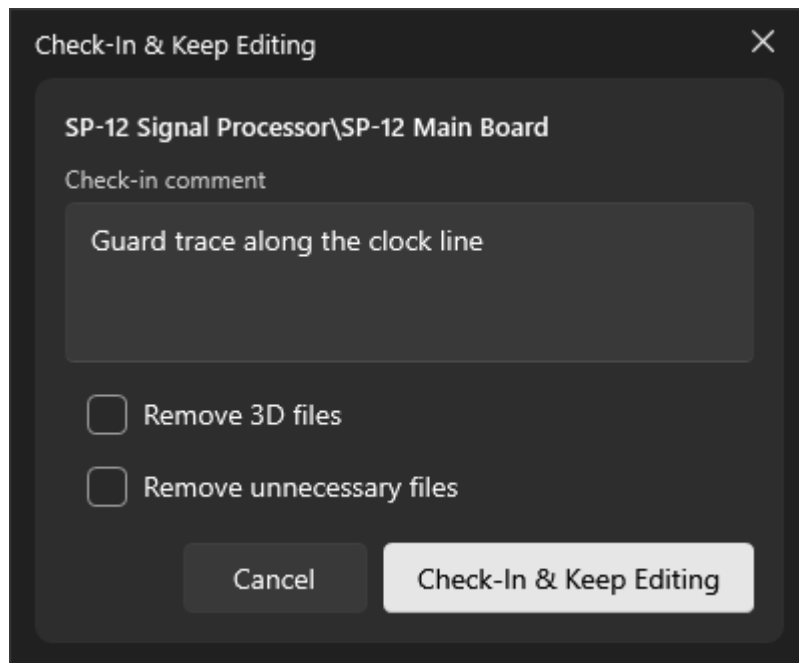
	Button	What it does
1	EEforce mark	Shows that this editor was opened by EEforce and is connected to it.
2	Save & Check In	Saves the design and checks it in as a new version. The editor stays open. See below .
3	Add comment	Pins a new comment on the board or the schematic sheet.
4	Comments	Shows or hides the comment markers on the design. The red badge counts the open (unresolved) comments.
5	Comment list	Opens the list of the design's comments.

Hover over a button to see what it does. In a read-only copy opened with **View**, **Save & Check In** is greyed out, but you can still read and add comments.

Saving a version without closing the editor

Click **Save & Check In** when you want to record your progress as a new version and keep working.

1. EEforce saves the design, exactly like the editor's own **File → Save**.
2. For a layout, it also refreshes the files EEforce needs to show the board: the preview data, and the 3D model for the **3D** view.
3. The **Check-In & Keep Editing** window opens over the editor. Type a comment that says what changed, then click **Check-In & Keep Editing**.

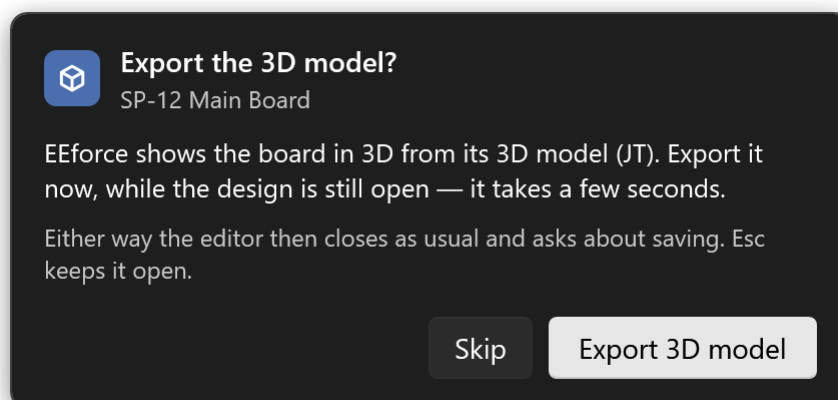


EEforce uploads the new version while you carry on. The design stays checked out to you, so you can save as many versions along the way as you like. In the schematic editor, **Save & Check In** saves every open sheet first.

The two checkboxes work as in a normal check-in: **Remove 3D files** and **Remove unnecessary files** keep the saved version lean. See [Checking Out & Checking In](#).

Closing the editor

When you close Layout on a design you have checked out, the Companion first offers to export the board's **3D model**. EEforce uses it for the **3D** view, and the editor can only export it while the design is still open.



{data-zoomable width=444}

- **Export 3D model** exports it into the design's output folder. It takes a few seconds.
- **Skip** closes without exporting. The **3D** view then shows the model from the last export, if there is one.
- **Esc** keeps the editor open.

After that the editor closes as it always does, including its own question about saving your changes. As soon as it has closed, EEforce opens **Finish Editing** for the design, ready to check it in. Click **Cancel** there if you aren't done yet: the design stays checked out to you.

::: tip Previews stay in step with your saves Every time you save a layout, the Companion also refreshes the data EEforce uses for its layout preview. Whatever you check in, the preview and **Compare** show the design exactly as you last saved it. :::

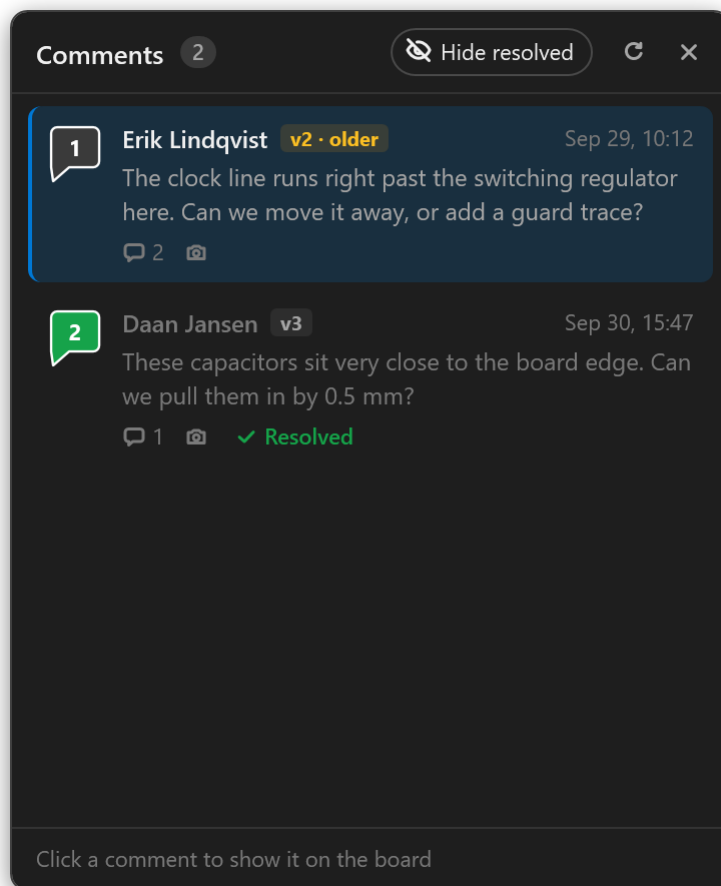
Comments in the editor

The comments your team leaves in the EEforce app or in EEforce 365 also show up in the editor, on the same spots. In Layout you see the layout comments; in the schematic editor, those on the schematic.

Showing the comments

Click **Comments** to show every comment as a numbered marker. Grey markers are open, green ones are resolved. Click **Comments** again to hide them. The editor then returns to exactly the view you had before.

Click the arrow next to **Comments** to open the comment list. Each card shows who wrote the comment, when, which version it was made on, and how many replies it has. A version tag in amber, such as **v2 • older**, means the comment was made on a different version from the one you have open.



{data-zoomable width=360}

Click a comment in the list, or its marker on the design, to go to it. The Companion takes the editor to the comment's spot:

- **In Layout**, it shows the layers the comment's author was looking at, at the same zoom.
- **In the schematic editor**, it opens the sheet the comment is on.

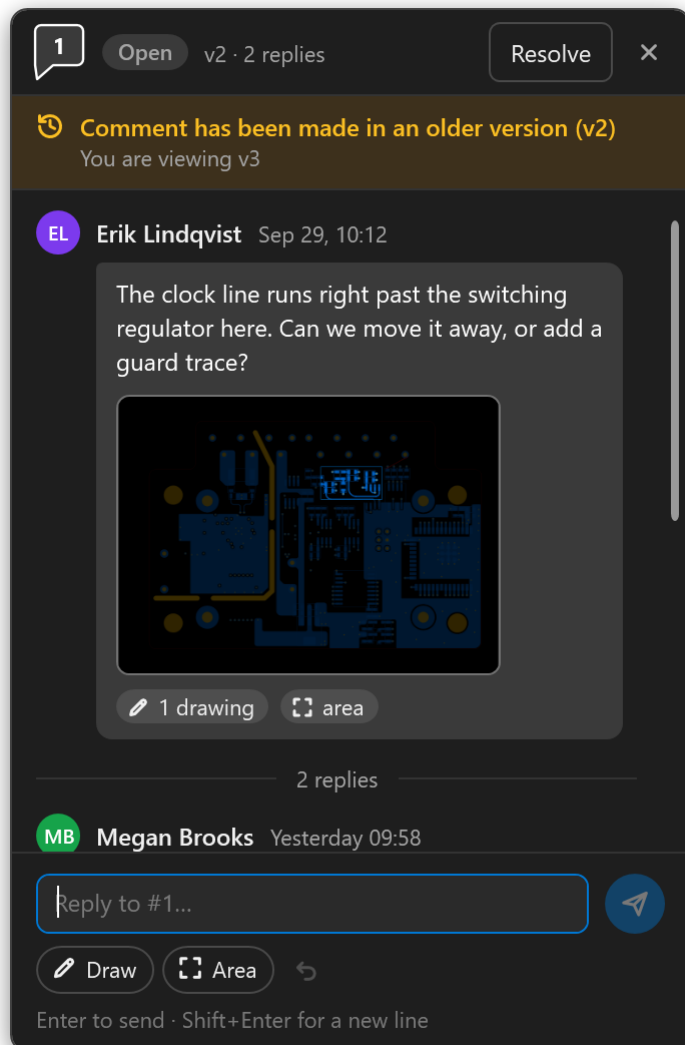
Any area the author marked is outlined on the design, their drawings are drawn on top, and the conversation opens next to the marker.

::: info Mirror View Comments are placed on the board as seen from the top. While comments are shown, the Companion switches Layout's **Mirror View** off and tells you so. :::

Hide resolved, at the top of the list, hides resolved comments from the markers and the list. The choice is remembered and applies to every editor at once.

Reading and answering a comment

The conversation box shows the comment and its replies, with the snapshot that was taken when it was written. Click a snapshot to see it full size. An amber note at the top tells you when a comment was made on another version than yours.

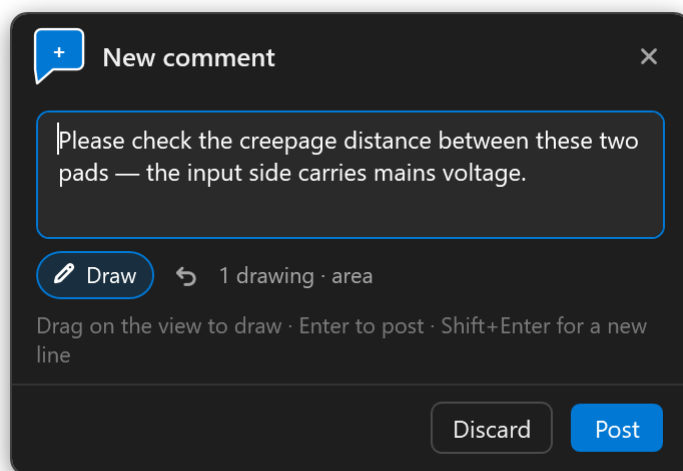


{data-zoomable width=364}

- Type a reply and press **Enter** to send it. **Shift+Enter** starts a new line.
- **Draw** lets you sketch on the design to make your point. Drag on the design to draw. The undo arrow takes the last stroke back.
- **Area** lets you drag out an area on the design that your reply is about. It is outlined for everyone who reads the reply.
- **Resolve** marks the comment as dealt with; **Reopen** opens it again. This needs the Contributor or Manager role on the project.

Adding a comment

1. Click **Add comment** on the toolbar.
2. Click the spot on the design you want to talk about, or drag to mark an area. **Esc** or a right-click cancels.
3. Type your comment in the box that opens.
4. Drag on the design to draw on it, if a sketch helps. Click **Draw** to switch drawing off when you need the editor again; the arrow takes the last stroke back. You can still zoom with the mouse wheel and pan with the middle button while the box is open.
5. Click **Post**.



{data-zoomable width=364}

The Companion takes a snapshot of the view with your drawings, so readers see exactly what you saw. The comment appears for everyone right away, in the app, in EEforce 365 and in other people's editors.

Good to know

- **The Companion only rides on editors EEforce opened.** A design you open in Xpedition or PADS Professional yourself, outside EEforce, doesn't get it.
- **It disappears with the editor.** When the editor closes, so does its Companion.
- **One design per editor.** Open each design from EEforce rather than opening another design inside an editor EEforce started. The Companion and the check-in follow the design EEforce opened.
- **Your display settings are safe.** Showing a comment changes the visible layers or sheet only while comments are shown. Hiding the comments, or closing EEforce, puts your view back.

- **Nothing else changes in your tool.** Earlier EEforce versions added menu entries and scripts to the design tools. The Companion replaces them, so there is nothing to install in Xpedition or PADS Professional.

What's next

- **Checking Out & Checking In** — the full editing workflow
- **Reviewing Designs Together** — comments in the EEforce app
- **Settings** — connect EEforce to your design tool

Working Remotely

Sometimes you need to work on a design somewhere the server can't be reached — a remote site, a flight, or a customer location with no VPN. EEforce lets you take a design *with you* and bring your changes back later.

The idea

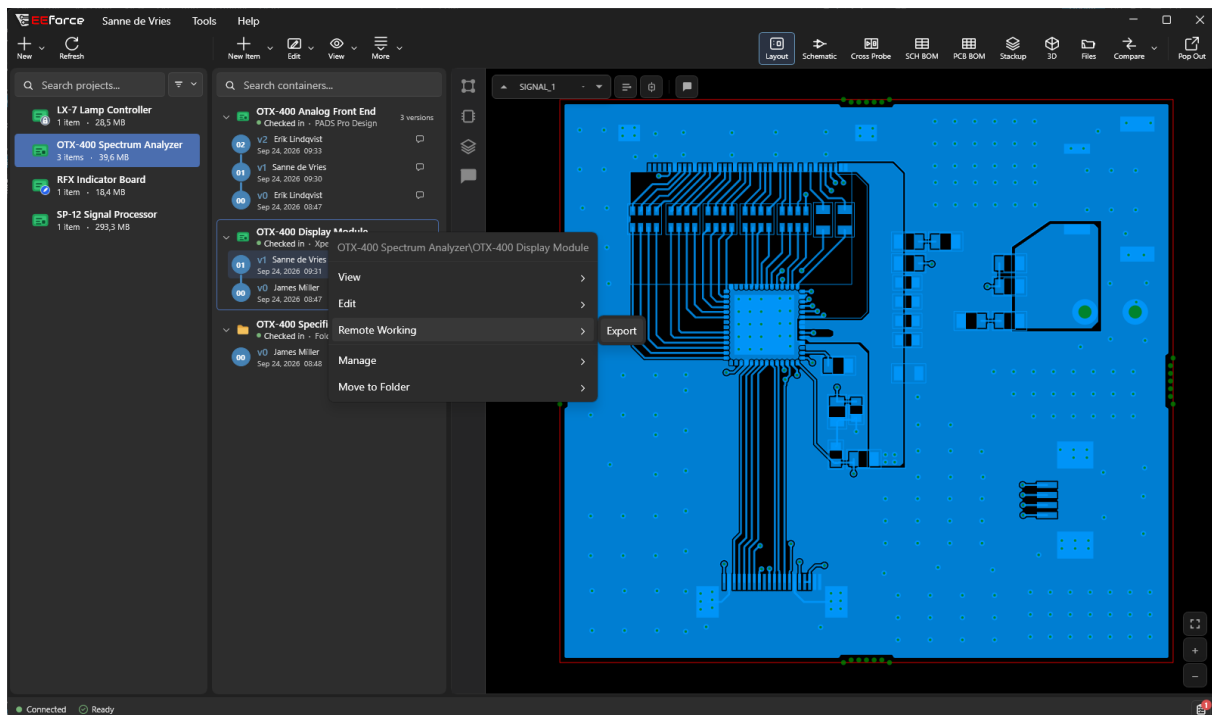
1. **Export** the design to a single package file. This checks it out and locks it for you, just like a normal check-out.
2. **Work offline** on the package with Xpedition or PADS Professional.
3. **Import** the updated package back into EEforce. This saves a new version and unlocks the design.

While the design is exported, it stays checked out to you. Others can view it but can't edit it — exactly as if you'd checked it out at your desk.

Taking a design with you

You need edit rights, and the design must be checked in.

1. Select the project, then the design.
2. Right-click the design → **Remote Working** → **Export**.
3. Choose where to save the package file, and save.



The package is a single, self-contained file — copy it to a USB drive, put it on a laptop, or send it however you need. The design now shows as **Checked out** on the server.

Working on it away from the server

Open and edit the package's design files with Xpediton or PADS Professional as usual. Keep everything in the same folder layout — don't rename or move files around inside it, or EEforce won't recognise it when you bring it back.

Bringing your changes back

You must have the design checked out (from the export step).

1. Select the checked-out design.
2. Right-click → **Remote Working** → **Import**.
3. Point EEforce at your updated files. EEforce asks for an **Import Comment** — it becomes the check-in comment of the new version, so say what you changed.

EEforce uploads your work as a **new version** and unlocks the design. You can watch the progress along the bottom of the window.

Changed your mind?

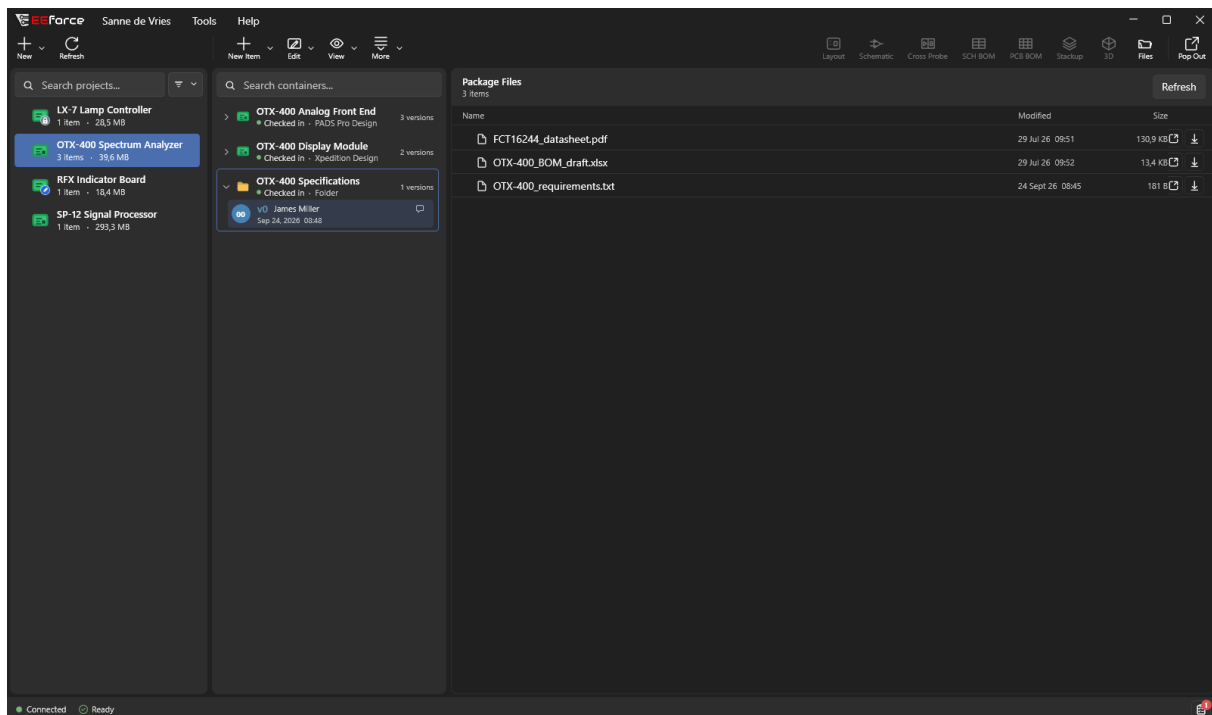
If you don't want to keep your remote changes, right-click the design → **Cancel Checkout**. The lock is released and no new version is created. See [Checking Out & Checking In](#).

Tips

Situation	Suggestion
Slow connection when importing	Switch Chunked upload on in Settings — it's off by default and helps large uploads survive a flaky link.
Several people working remotely	Give each person a <i>different</i> design — never the same one.
Away for a while	Let your team know which design you have, since it stays locked.
Lost the export file	Cancel the check-out on the server and export again.

Browsing & Downloading Files

Your designs are always yours to retrieve. Every file inside every version can be opened or saved to your PC at any time — you never need to check a design out just to grab one file, and you never need direct access to the server.



Opening the file browser

Select a design and click **Files** in the top-right corner. EEforce shows the complete contents of that design's package — every folder and file, laid out exactly as it was when checked in. For a checked-in version the view is titled **Package Files**.

If a design has no picture preview, EEforce opens this file browser for you automatically.

Opening or saving a file

In the stored package, each row has two buttons on the right:

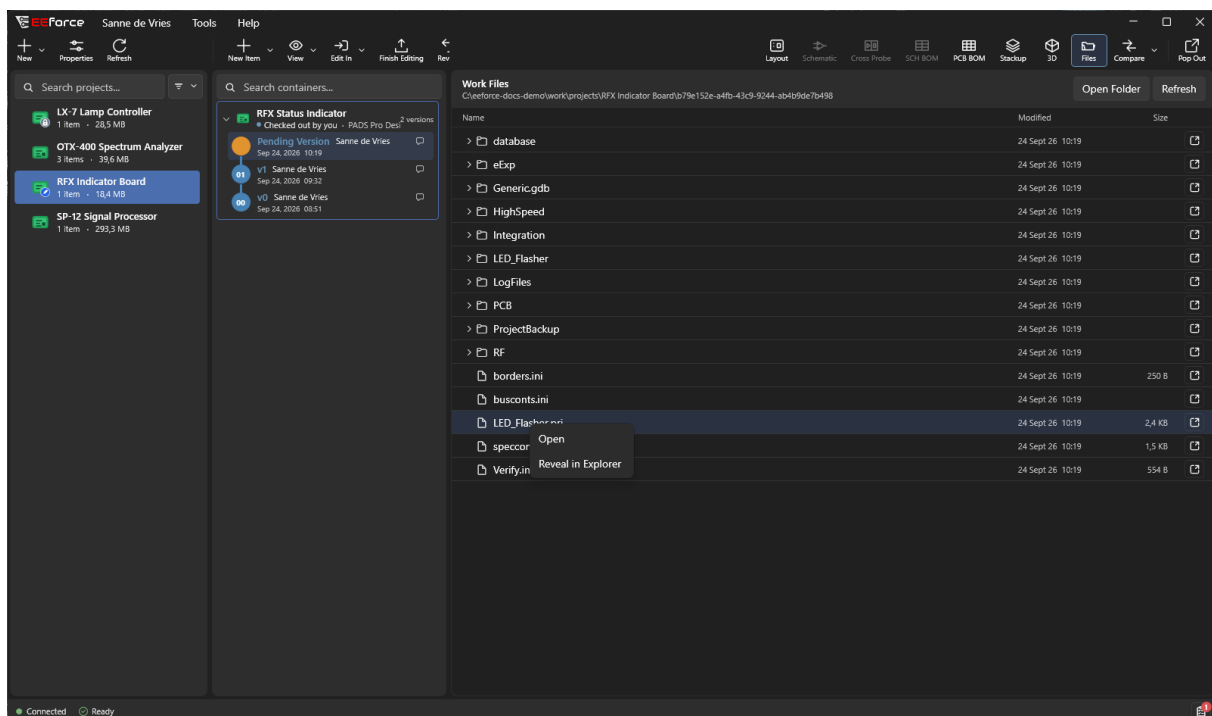
Button	What it does
Open	Downloads the file and opens it with the matching program on your PC (a PDF in your PDF reader, a spreadsheet in Excel, and so on).
Download	Saves a copy to a location you choose, without opening it.

You can do the same with a whole folder — download an entire sub-folder in one go. Larger items show a progress bar while they transfer.

Working copies: the Work Files view

When a design is **checked out** to you, the Files view shows your local working copy instead of the stored package. The heading says **Work Files** and the path points into your working folder; the row menu here offers **Open** and **Reveal in Explorer**, and the header has **Open Folder** and **Refresh**. Handy for checking exactly what you have on disk before you finish editing.

If the working files are somewhere else, the Work Files view says where: on another computer, if you checked the design out there; on the machine of the colleague who has it checked out; or outside EEforce, for a design exported for **remote working**.

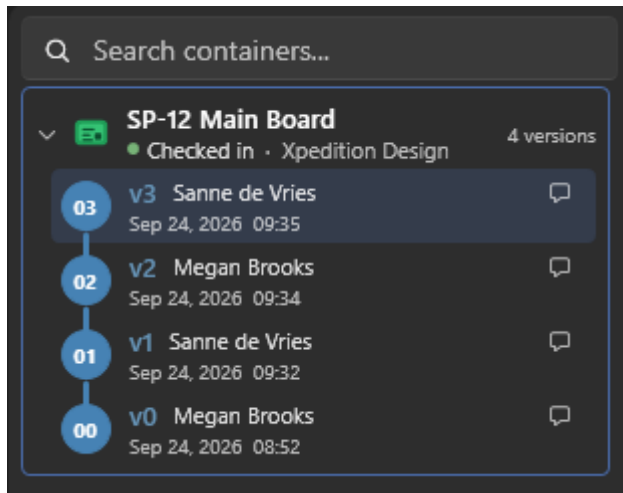


Getting a file from an older version

Because every version is kept, you can reach back and pull a file from any point in a design's history:

1. Select the design and click it again to show its **version history**.
2. Select the version you want.
3. Open **Files** and download what you need.

The current version is never touched — you're simply taking a copy of how things looked then.



Where your downloads go

- **Download** saves wherever you choose in the moment.
- **Open** places the file in a temporary working area on your PC and opens it. You can find your working folder — and change where it lives — in **Settings → Working Directory**. See [Settings](#).

If you're worried about losing files

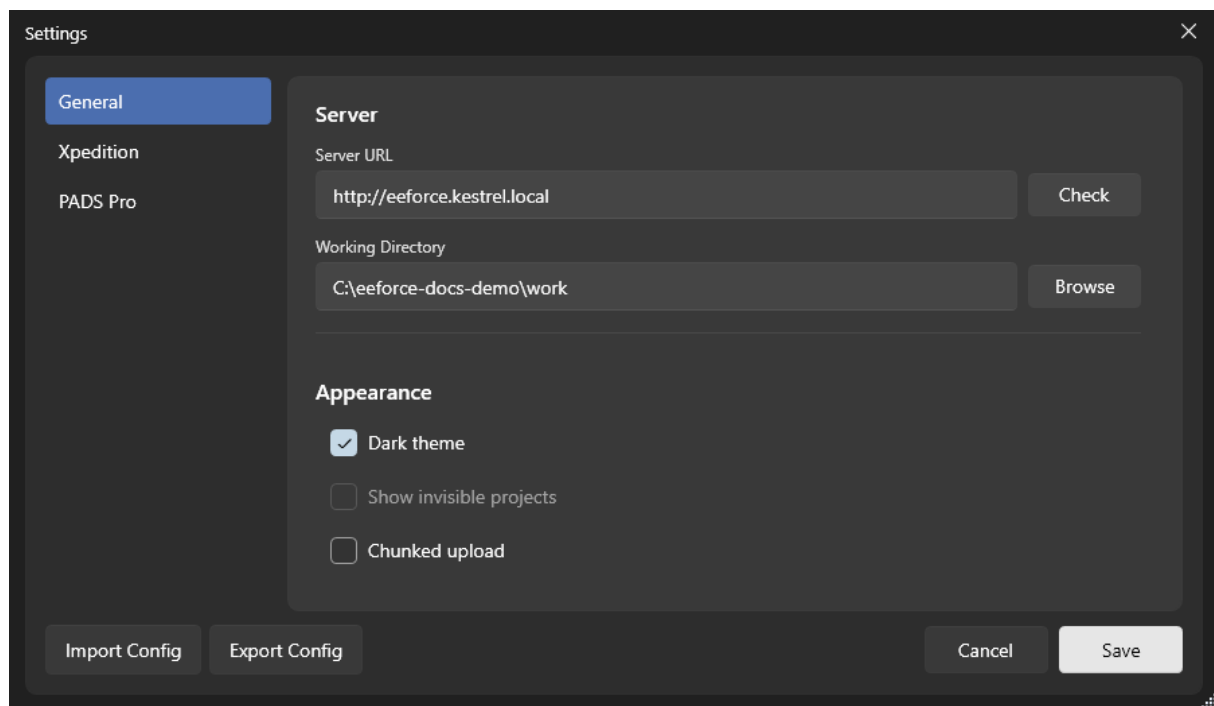
- **Nothing is deleted when a new version is saved** — every version stays in the history.
- **No server access or extra software needed** — everything comes through the EEforce app.
- **Deleted a design by mistake?** Deleted designs go to the server's trash; an administrator can restore them from there. Pruned versions go there too. See [Storage Assistant](#).
- **Need the complete, editable set?** Check the design out — see [Checking Out & Checking In](#).

If you can't reach the server at all, see [Staying Connected](#).

Settings

Open **Tools → Settings** to adjust how EEforce behaves on your PC. Most people set these once and never touch them again.

General



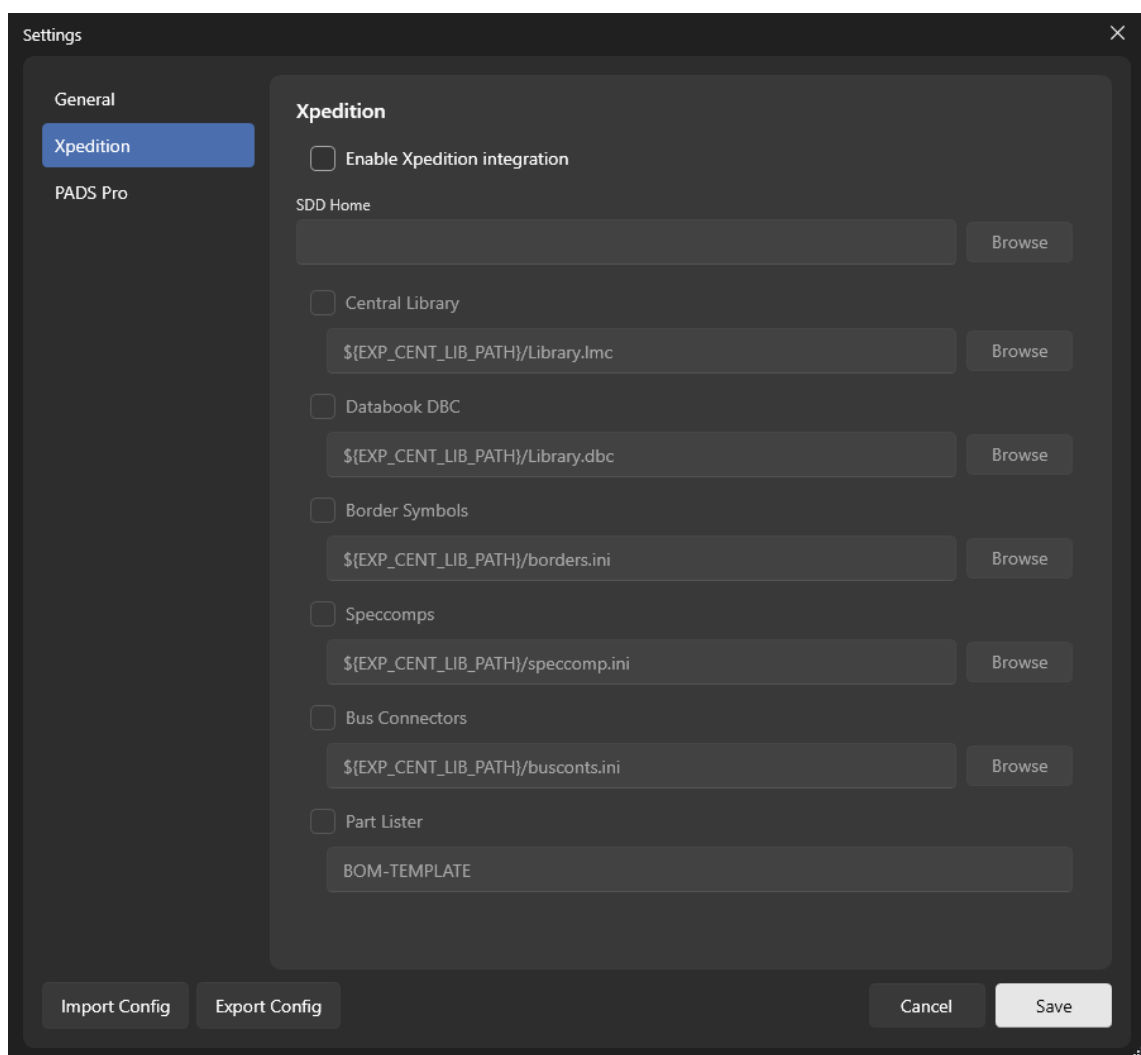
Setting	What it does
Server URL	The address of your company's EEforce server. Usually set for you. Click Check to confirm EEforce can reach it.
Working Directory	The folder on your PC where EEforce keeps designs you've checked out or opened. Click Browse to move it.
Dark theme	Tick for the dark look, clear it for the light one.
Show invisible projects	Reveals hidden projects. Only the server's built-in administrator account can switch this on.
Chunked upload	Off by default. Switch it on if large check-ins fail or stall over a slow or flaky connection — it uploads them in pieces.

Use **Import Config** and **Export Config** to copy your settings to another PC or share a standard setup with your team.

Connecting your design tool

If you'll be *editing* designs, EEforce needs to know where your **Xpedition** or **PADS Professional** installation lives. This lets it open designs in the right tool, pull out bills of materials, and put the **EEforce Companion** on the editors it opens. Nothing is installed into the design tool itself.

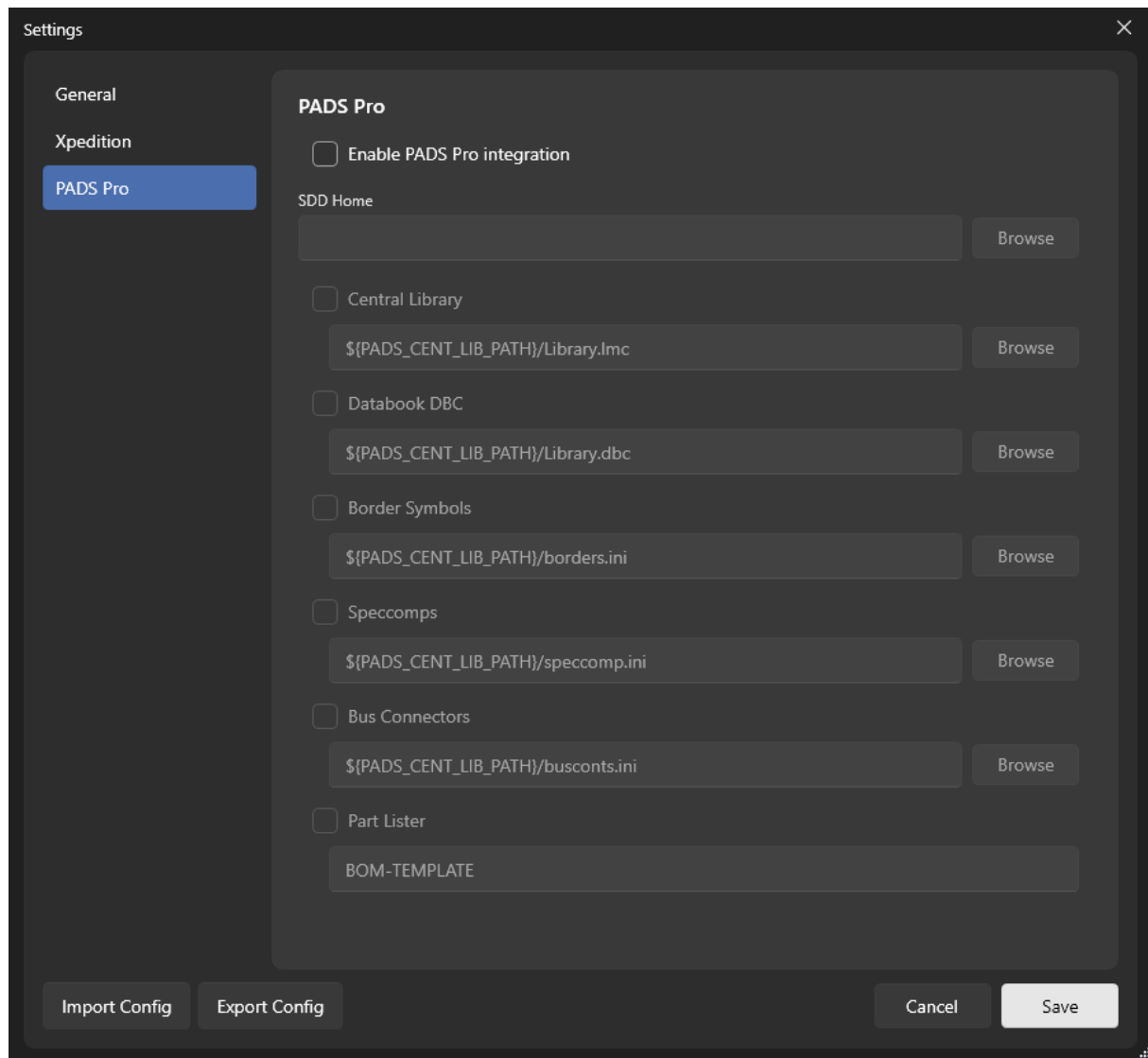
1. Open the **Xpedition** (or **PADS Pro**) tab.
2. Tick **Enable Xpedition integration** (or **Enable PADS Pro integration**).
3. Set **SDD Home** to your tool's installation folder (your administrator or IT team can tell you where this is).



4. The remaining fields are optional and only needed for advanced setups. Each is a path (with a tick to switch it on) that points at one of your tool's configuration files:

Field	Points to
Central Library	The central library file; the default uses your tool's environment variable, for example <code>\${EXP_CENT_LIB_PATH}</code> .
Databook DBC	Your databook database.
Border Symbols	The border and sheet symbols library.
Speccomps	The <code>Speccomps.ini</code> file.
Bus Connectors	The bus connector definitions.
Part Lister	The name of the part-lister configuration used for BOM exports.

The **PADS Pro** tab works the same way for PADS Professional.



... tip Only looking at designs? Skip this section. Browsing projects, previewing, comparing, commenting and downloading files all work without Xpedition or PADS Professional. The tool settings only matter when you open a design in the tool itself. ...

Staying Connected

EEforce is designed for long working days and the occasional hiccup — a dropped Wi-Fi signal, a laptop waking from sleep, a VPN reconnecting. It handles these quietly and tells you plainly when something needs your attention. This page explains what you'll see and what to do.

The connection indicator

The bottom-left corner of the window always shows how EEforce is doing.

Indicator	Meaning	What to do
Connected	All good. You're receiving live updates from the server.	Nothing — carry on.
Connecting	Establishing the connection, usually just after sign-in.	Wait a moment.
Reconnecting	The connection dropped and EEforce is restoring it on its own.	Wait — this usually clears itself in seconds.
Disconnected	EEforce can't reach the server right now.	See When you can't reach the server below.

Short interruptions fix themselves

A brief network drop is normal and nothing to worry about. EEforce shows **Reconnecting** and keeps trying in the background. When the network comes back, it reconnects automatically and returns to **Connected** — you don't need to restart anything or sign in again.

Your checked-out work is always safe

The most important thing to know: **a checked-out design is held for you on the server, not just on your PC**. If your connection drops, your computer restarts, or you close EEforce entirely, the design stays checked out to you. When you sign back in, it's still yours to finish or cancel. Nothing you've done is lost.

When the server's licence has expired

If the server's licence runs out, EEforce switches to **read-only mode**: you can browse, preview and download, but nothing can be changed, and a **Read-Only Mode — License Expired** bar sits at the top of the window. See [Signing In](#) for what you'll see; renewals are covered in [Licensing](#).

When your session ends

EEforce renews your sign-in quietly in the background, so long working days don't interrupt you. Sometimes a session genuinely ends rather than just pausing:

- Your session **expired** and couldn't be renewed.
- You **signed in on another computer**. EEforce allows one active session per person — see [One session at a time](#).

When this happens, EEforce shows a message explaining why, then returns you to the sign-in screen. **Sign in again** to continue. Your projects, designs and check-outs are exactly as you left them.

When you can't reach the server

If the indicator stays on **Disconnected**, the server itself may be unreachable. Try these in order:

1. **Check your own connection** — can you reach other company systems or websites? If not, it's your network.
2. **If you're remote, check your VPN** — EEforce needs the same access you'd use to reach shared drives.
3. **Wait a minute** — EEforce keeps retrying and will reconnect on its own once the server is reachable.
4. **Still stuck?** — contact whoever manages EEforce at your company. The server may be restarting or undergoing maintenance.



Even while disconnected, anything you've already downloaded — files you opened or saved, and a design you have checked out — remains on your PC. You won't lose access to what you were working on.

A quick recovery checklist

If...	Then...
Indicator shows Reconnecting	Wait — it clears itself.
You were returned to the sign-in screen	Sign in again; your work is safe.
Indicator stays Disconnected	Check your network/VPN, then contact your administrator.

If...	Then...
You had a design checked out	It's still checked out to you after you reconnect.
You need a file right now while offline	Use what you've already downloaded; retrieve the rest once reconnected — see Browsing & Downloading Files .

Setting Up the Server

The EEforce server is the shared home for every project: it stores all designs and versions, hands out licences and serves the web admin, the client download and EEforce 365. It is installed once by your IT team on a Windows machine; after that, users only install the [desktop app](#).

Before you start

Requirement	Details
OS	Windows Server 2022/2025 (Core, Essentials, Data Center) or Windows 10/11 (LTSC, Pro, Enterprise)
CPU	4+ vCPUs recommended
RAM	4 GB free when idle (minimum)
Storage	20 GB+ on local disk; NVMe/SSD recommended
Network	Reliable LAN between server and clients
Licence file	Prepared for this machine — see Licensing
Backup	Windows shadow copy or equivalent backup solution

Have these decisions ready before you run the installer:

- **The layout** — where the software, the vault and the trash folder should live.

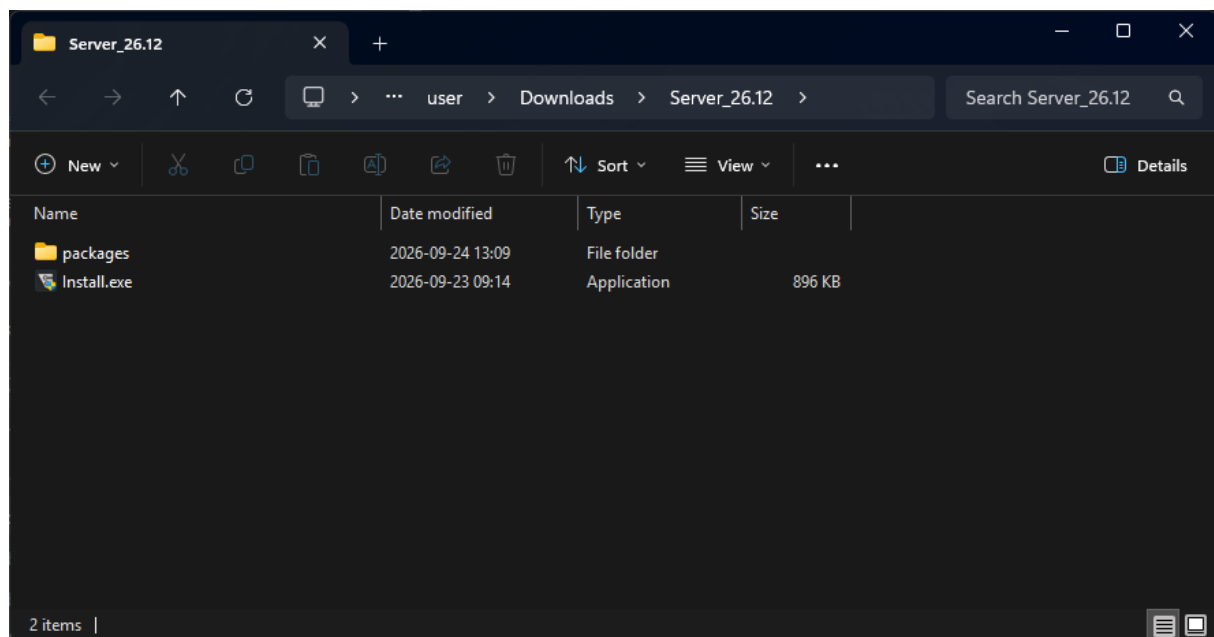
- **The network** — which HTTP and HTTPS ports the server should listen on, and how it should provide HTTPS: a self-signed certificate for a quick start, or your company's own certificate (a [.pfx](#) file that includes the private key) for production.
- **The address** — the name users will reach the server by. Using a host name (with a DNS record or hosts entry) rather than a raw IP address makes certificates and later changes much easier.



Using a network share for the vault works but slows check-ins and check-outs down. If you use one, make sure the IIS application pool identity has full read/write permissions on the path.

Get the server package

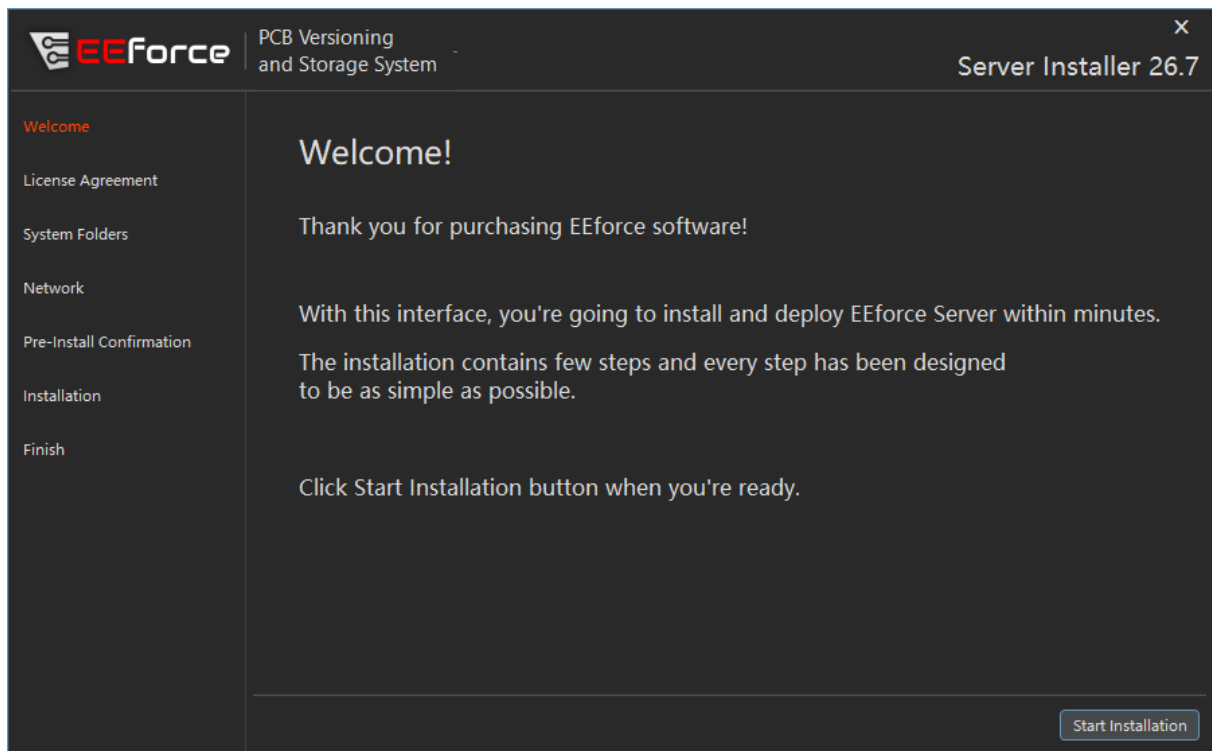
1. Download the latest server package from the [Support Portal](#). The file is named [Server_XX.X.zip](#) (version numbers vary).
2. Extract the ZIP to a folder of its own.



The folder contains [Install.exe](#) and a [packages](#) folder with everything the installer needs.

Run the installer

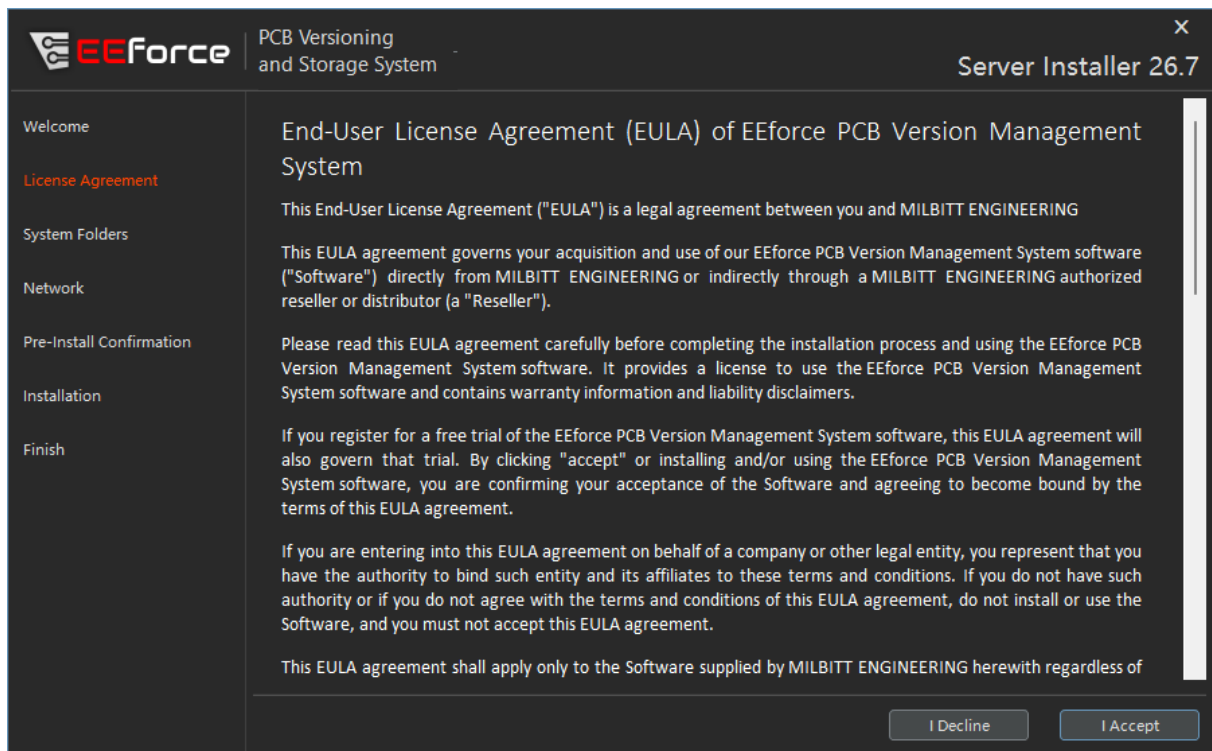
Run **Install.exe** and allow it when Windows asks for administrator rights. The welcome page appears:



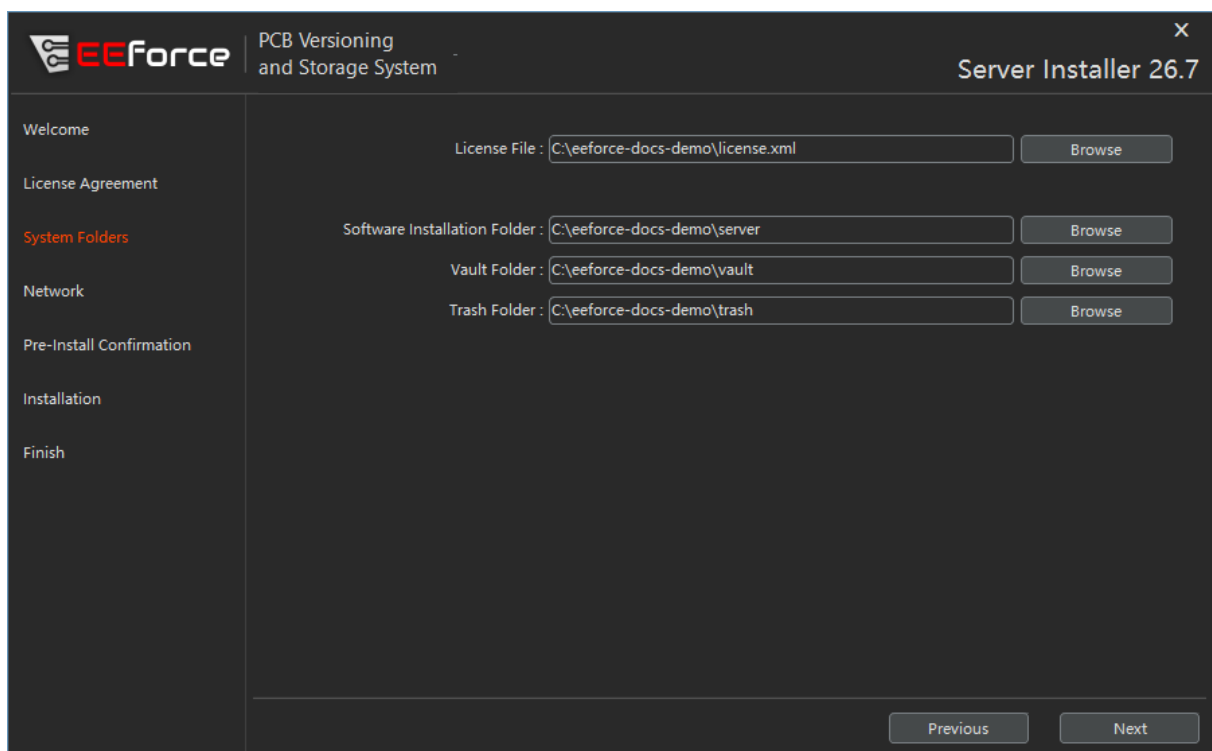
Click **Start Installation** — this only starts the wizard; nothing is installed yet.

1. Accept the licence agreement

Read the End User License Agreement and click **I Agree** to continue.



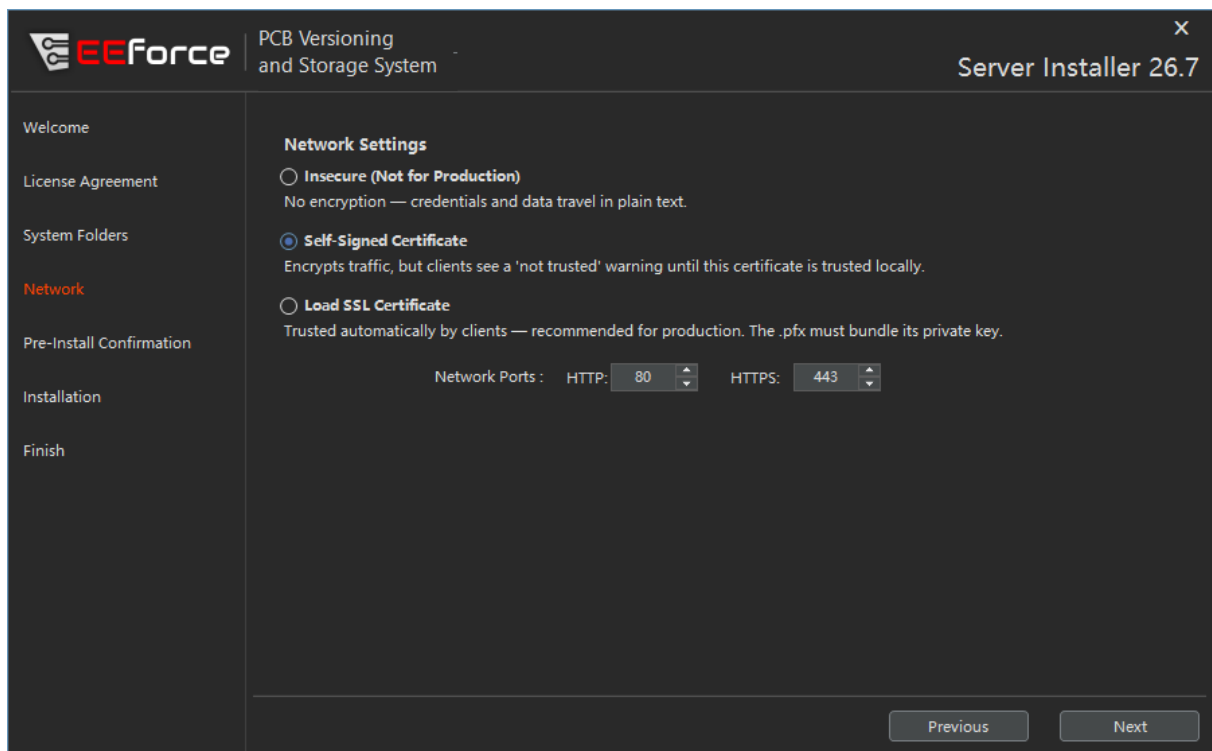
2. Choose the folders



Field	Purpose	Notes
Software Installation Folder	Where the server software is installed	Local disk; around 150 MB
Vault Folder	Stores all designs and versions	20 GB+ to start; back it up regularly
Trash Folder	Holds deleted designs before they are removed for good	Clean it up from time to time
License File	The licence file for this server	From your reseller — see Licensing

Click **Next** when all fields are filled in.

3. Set up the network

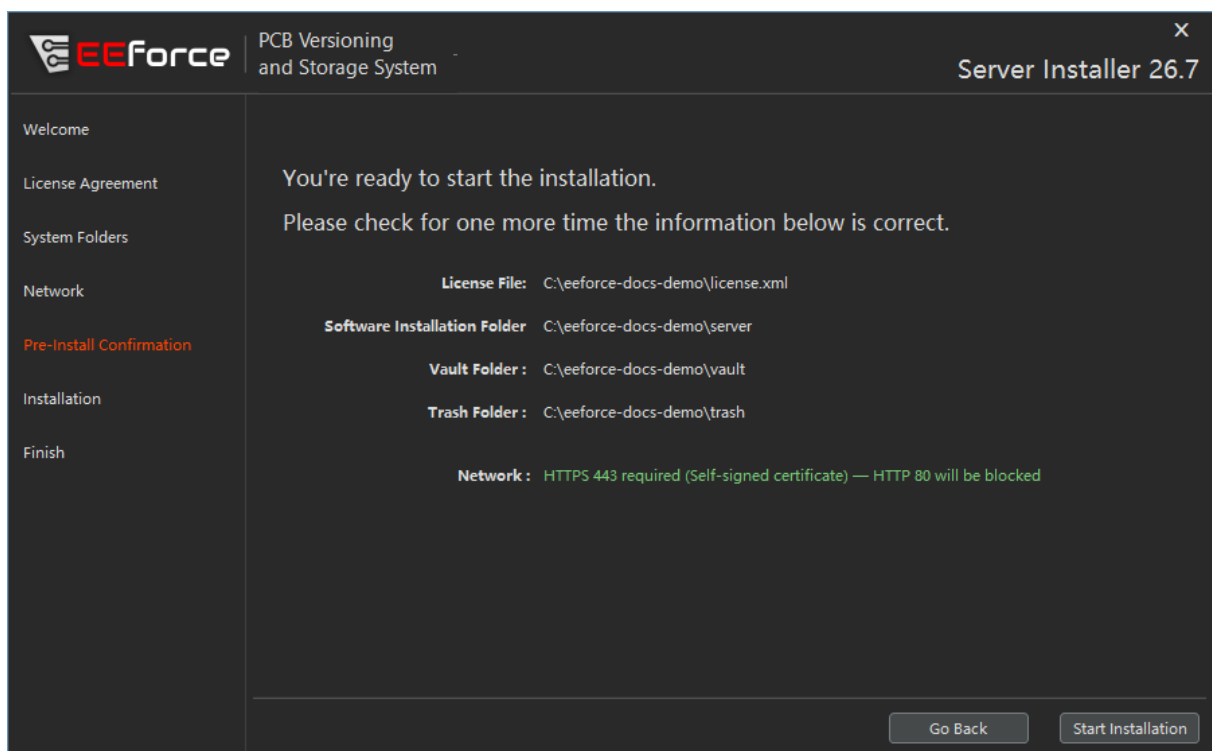


Set the **HTTP** port — and the **HTTPS** port, when you use a certificate — then choose how the server provides HTTPS:

Mode	What it means
Insecure (Not for Production)	No encryption — credentials and data travel in plain text. Only for trying things out.
Self-Signed Certificate	Traffic is encrypted, but users see a “not trusted” warning until the certificate is trusted on their machines.
Load SSL Certificate	Your own certificate. Clients trust it automatically — recommended for production. The <code>.pfx</code> must bundle its private key.

The certificate (or a generated self-signed one) is kept in the installation folder’s `ssl` folder and is kept as it is when you upgrade later.

4. Confirm



The confirmation page summarises your choices — including the resolved HTTPS mode and ports — and warns if a choice needs attention. Click **Start Installation** to begin for real.

5. Let it install

The installer creates the folders, gives the server's application pool access to them, installs the IIS role if it isn't there yet, deploys EEforce and configures HTTPS. This can take a few minutes on a first install. A progress page shows where it is.

6. Finish

The last page shows the **server address** your users will need — click **Copy to clipboard** to copy it. **Open Log File** shows what happened if something looks wrong; then click **Finish Installation**.

Hand the server address out to your users (they enter it during **client installation**) — for example `http://eeforce.kestrel.local`.

Unattended installation

Both installers can run without any windows, which is handy for deployment scripts. Run the installer with `/silent` and the settings as parameters: an upgrade uses the settings from the previous installation unless you override them.

```
1 Install.exe /silent [/installdir <path>] [/vaultdir <path>] [/trashdir  
    <path>] [/license <path>] [/verbose]
```

- The licence file must exist (from the previous installation, `/license`, or `license.xml` next to the installer).
- Administrator rights are required.
- The client installer accepts `/silent /installdir <path> /serverurl <url>` in the same way.
- `/help` prints the full reference, and every silent run writes an `install_*_log.txt` next to the executable.

Starting and stopping the server

The EEforce server runs as an IIS (Internet Information Services) application pool.

Using IIS Manager: press `Win + R`, type `inetmgr` and press Enter; open **Application Pools**, find **EEForceApplicationPool** and start or stop it.

Using PowerShell:

```
1 # Start the server
2 Start-WebAppPool -Name "EEForceApplicationPool"
3
4 # Stop the server
5 Stop-WebAppPool -Name "EEForceApplicationPool"
```

You can also restart the server from the web admin — see [Restarting the server](#).



While the server is stopped, nobody can sign in or check work in. Make sure everyone has finished before you stop it.

After installation

- Open the server address in a browser. The start page links to the **Admin Panel**, the **client download** and **EEforce 365**.
- Administration starts in the web admin: [Web Admin Interface](#). Create your users and groups there, set up [LDAP](#), [SSO](#) or [SCIM provisioning](#) if you use them, and point the vault at your [storage](#) of choice.
- Server settings live in `config\config.json` under the installation folder. Use the web admin's Settings pages to change them — the file is maintained by the server.

Changing the certificate or ports later

Run the installer again and pick the new options on the Network page; your folders and data are left as they are. The server address on the last page reflects the new setup.

Troubleshooting

Symptom	Possible cause	Resolution
Clients cannot connect	Firewall blocking a port	Open the HTTP/HTTPS ports you chose on the Network page in Windows Firewall

Symptom	Possible cause	Resolution
“Access denied” on vault operations	Folder permissions	Give <code>IIS_APPPOOL\EEForceApplicationPool</code> full control on the vault and trash folders — see Permissions for moved folders
Server won’t start after moving folders	Wrong path in the storage settings	Check the folder exists and is reachable, then correct the setting in the web admin
Users see a “not trusted” certificate warning	Self-signed certificate	Trust the certificate on the user machines, or re-run the installer with your company certificate
Slow check-in and check-out	Vault on slow or network storage	Move the vault to local NVMe/SSD or improve the network path

Licensing

Every EEforce server runs on a **licence file** — a small XML file that says which EEforce products your company can use, which optional features are enabled and how many people can use each product at the same time.

How seats work

- Each product in the licence file has a number of **seats**.
- When someone opens the desktop app, they pick a licence; that session holds one seat (see [Choosing a licence](#)). Closing the app frees the seat for the next person.
- EEforce 365 in the browser needs **no seat at all** — see below.
- The number of free seats is shown on each licence card at sign-in, and administrators can see every seat that is in use on the web admin’s [License](#) page or from the client’s **Tools → License Activity**.

The licence file

EEforce

Dashboard

Users

Groups

Projects

License

Logs

Audit Trail

Settings

admin

Administrator

License Management

Licensing Active · Kestrel Dynamics

Refresh

LICENSED FEATURES

EEFORCE SERVER · LDAP AUTHENTICATION · SCIM PROVISIONING · SINGLE SIGN-ON (SSO) · S3 INTEGRATION · AZURE BLOB STORAGE

Seats in use

4 of 15

4 active users

Usage

License File

Licensed To

Kestrel Dynamics

License ID

XXXX-XXXX

Issued By

MILBITT-HQ

Bound Server Hardware ID

XXXX-XXXX

Site ID

2026120101

This Server's Hardware IDs

XXXX-XXXX, XXXX-XXXX, XXXX-XXXX, XXXX-XXXX

Issued Date

24-Sept-2026

Licensed Seats (15)

NAME	CODE	TYPE	VERSION	EXPIRES	SEATS	STATUS
EEforce for PADS Professional	ee_pads	Floating	202608	27-Sept-2027	5	AVAILABLE
EEforce for Xpedition	ee_exp	Floating	202608	27-Sept-2027	5	AVAILABLE
EEforce Web Seat	eeforce_web	Floating	202608	10-Oct-2027	5	AVAILABLE

Update License File

Upload a new license file (.lic, .xml, or .license) issued by EEforce for this server. It is verified before it is applied and takes effect immediately — no reinstall or manual file replacement is required.

The licence file contains the licensee, the site ID, the licence ID and issue date, the licensed seats (product, type, version, expiry, seat count) and the features your company has bought — for example LDAP, SSO, SCIM or cloud storage. It is bound to the server machine’s hardware, and the server keeps it with its own data (in its `licensing` folder).

Where you meet it	When
Server installer	You point the installer at the licence file on its System Folders page — see Setting Up the Server
Web admin → License → License File	View what’s licensed, and upload a replacement

Renewing or replacing a licence

1. Get the new XML file from your reseller (for example when renewing, or when moving to a new server).
2. Open the web admin → **License** → **License File**.
3. Click **Update License File**, choose the file and upload it with **Upload & Activate**.

The new licence takes effect immediately — no restart, and no need to interrupt users. If the old licence had expired and the server was in read-only mode, everything starts working again straight away.



If the server hardware changes (a new machine, a rebuilt VM), the existing licence will no longer match it. Ask your reseller for a licence issued for the new hardware.

Licence types

Duration

Type	Meaning
Perpetual	Use the software indefinitely; includes one year of upgrades and support
Term (subscription)	Use it for a fixed period — typically a year, including upgrades and support

Binding

Type	Meaning
Floating	Any machine can use a seat, up to the seat count; seats are shared between users
Node-locked	Tied to one specific machine

Product

There is one licence (and one card at sign-in) per product, for example **EEforce for PADS Professional** and **EEforce for Xpedition**. Which product a person picks depends on the design tool they work with

— see [Signing In](#).

EEforce 365 needs no licence seat

Reviewing designs in the browser with **EEforce 365** uses no seat and needs no client licence: it only checks the user's account and their role on the project. Someone can keep the portal open while also signed in to the desktop app on the same account.

Your licence file may contain a web seat row for EEforce 365. Nothing consumes those seats, so you can leave them as they are.

When a licence expires

A product's seats expire

The licence card for that product shows the expired date and offers no free seats; other products are unaffected. The seats come back as soon as a renewed licence is uploaded.

The server licence expires — read-only mode

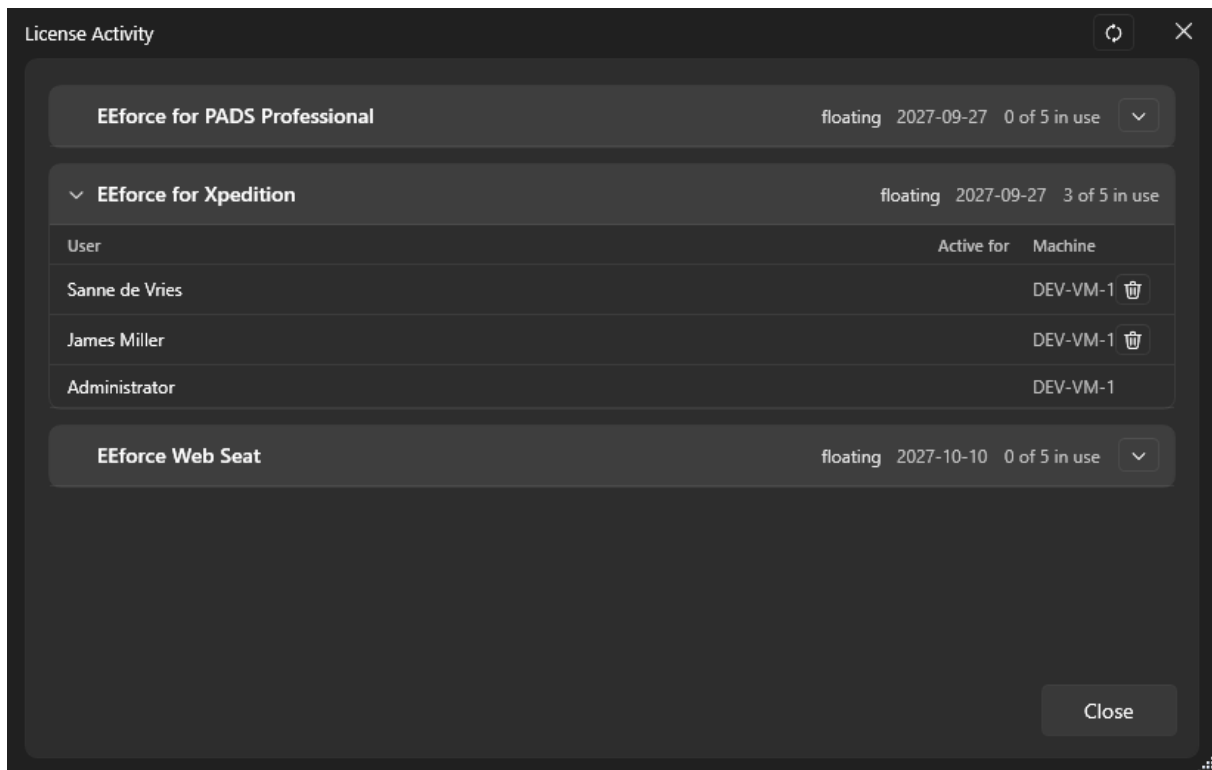
When the licence that covers the server itself runs out, EEforce does **not** lock you out of your data. It switches to **read-only mode**:

- Everyone can still sign in, browse projects and preview designs in the desktop app or EEforce 365. Files can still be downloaded from the desktop app.
- Nothing can be changed: check-outs, check-ins, uploads and edits are refused with an explanation.
- Administration keeps working, so you can upload a renewed licence straight away.
- No seats are handed out while it lasts.

In the desktop app the sign-in screen skips the licence step and shows a **Read-Only Mode — Licence Expired** bar across the top of the window. Uploading a renewed licence lifts read-only mode immediately.

Expired *product* seats alone don't trigger read-only mode — only the server licence does.

Managing seats day to day



Admins can free a seat that is held by a session that is no longer really there — a crash, a machine that was re-imaged, a laptop that went home:

- In the desktop app: **Tools** → **License Activity**, then use the delete button on the session's row. Admins only.
- In the web admin: **License** → **Usage**, then **Drop**.

Dropping a seat does not sign that user out, and if their app is still active it will take a seat again by itself. A seat whose machine stopped reporting a heartbeat a few minutes ago is shown as stale.

Troubleshooting

Symptom	What to do
“None available” on a licence card	All seats are in use. Check the web admin’s Usage tab or License Activity for stale sessions and drop those; otherwise wait, or ask about more seats. Remember that EEforce 365 needs none.
A feature tab is locked (S3, Azure, LDAP, SSO, SCIM)	The licence file doesn’t include that feature — ask your reseller.
“This license is expired” / read-only mode	Upload the renewed licence file — see above. It takes effect immediately.
The server says the licence is invalid or for another machine	The file must be issued for this server’s hardware (and be signed correctly). Contact your reseller with the server’s hardware IDs from the License File tab.
Wrong products or seat counts	The licence file itself decides these — compare it on the License File tab.

What’s next

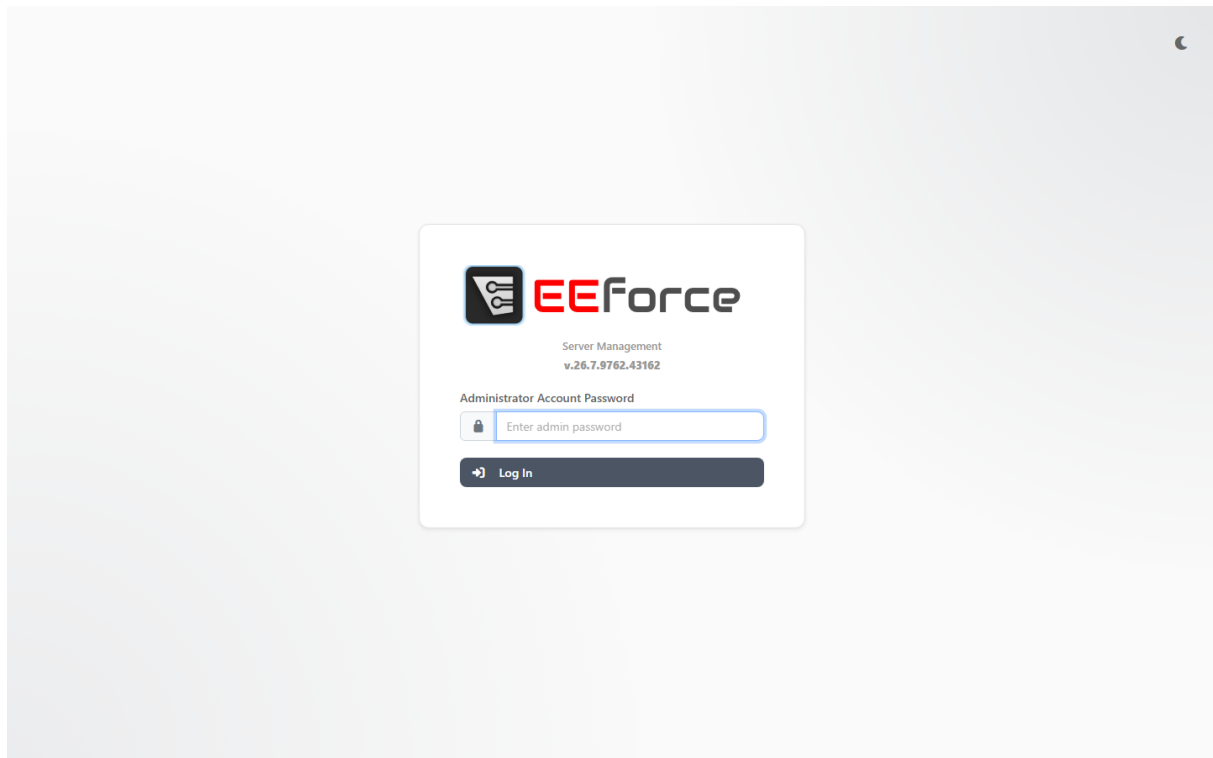
- [Signing In](#) — choosing a licence as a user
- [Web Admin Interface](#) — the License pages in detail
- [Setting Up the Server](#) — choosing the licence file during installation

Web Admin Interface

The EEforce web admin is the browser-based administration console for your EEforce server. Everything an IT administrator needs — user accounts, groups, project access, storage, licences, logs and server settings — lives here, and there is nothing to install: any modern browser will do.

⋮ info Opening the web admin Browse to your server address followed by `/admin` — for example <http://eeforce.kestrel.local/admin>. The server’s start page also links to it (**Open Admin Panel**). ⋮

Signing in



The sign-in page asks for the **administrator password** only. It works with the server’s built-in administrator account and nothing else — being a member of the Project Administrators group in EEforce does **not** open the web admin. If you don’t know the password, ask whoever installed the server; you can change it on the [Users](#) page once you are in.

A few things you’ll notice:

- Repeated failed sign-in attempts are slowed down automatically.
- A session ends after a period without activity — you’ll see “*Your session has expired. Please log in again.*” and return to the sign-in page.
- The theme toggle at the bottom of the sidebar switches the console between light and dark.
- **Log out** with the icon in the sidebar footer.

Dashboard

The screenshot shows the EEforce Dashboard interface. On the left is a sidebar with navigation links: Dashboard, Users, Groups, Projects, License, Logs, Audit Trail, and Settings. The main content area is titled 'Dashboard' and contains two primary sections. The 'System Status' section at the top includes a 'Refresh' button and displays the status of PDM SERVER (Active), LDAP AUTH (Disabled), and SSO AUTH (Disabled). Below this, it shows 'Server Version' as 26.7.9762.43162, 'Active Sessions' as 5, 'Uptime' as 0d 0h 1m, and 'Total Users' as 10. The 'Currently Online Users' section below features a table with columns for USER ID, NAME, LAST ACTIVITY, and STATUS. The table lists five users: admin (Administrator), james.miller (James Miller), sanne.devries (Sanne de Vries), erik.lindqvist (Erik Lindqvist), and megan.brooks (Megan Brooks), all with 'ONLINE' status. At the bottom left, a user profile for 'admin Administrator' is visible.

USER ID	NAME	LAST ACTIVITY	STATUS
admin	Administrator	admin/NzdhM 2026-09-24	ONLINE
james.miller	James Miller	james.miller/YTgxY 2026-09-24	ONLINE
sanne.devries	Sanne de Vries	sanne.devries/Y2YyO 2026-09-24	ONLINE
erik.lindqvist	Erik Lindqvist	erik.lindqvist/Y2UzN 2026-09-24	ONLINE
megan.brooks	Megan Brooks	megan.brooks/NjVjY 2026-09-24	ONLINE

The Dashboard is a live overview of the server:

- **System Status** — whether the PDM server itself, LDAP authentication and SSO authentication are up, together with the server version and uptime
- **Active Sessions** and **Total Users**
- **Currently Online Users** — who is signed in right now, with their last activity

Click **Refresh** to update the page.

Users

The screenshot displays the EEforce User Management interface. On the left is a sidebar with navigation links: Dashboard, Users, Groups, Projects, License, Logs, Audit Trail, and Settings. The main area is titled 'User Management' and contains two panels. The left panel shows a list of users with a search bar and buttons for 'Refresh' and 'Add'. The right panel shows the details for the selected user, Sanne de Vries, including fields for User ID, Full Name, Email, Authentication Type, and Group Memberships. The 'Active User' checkbox is checked.

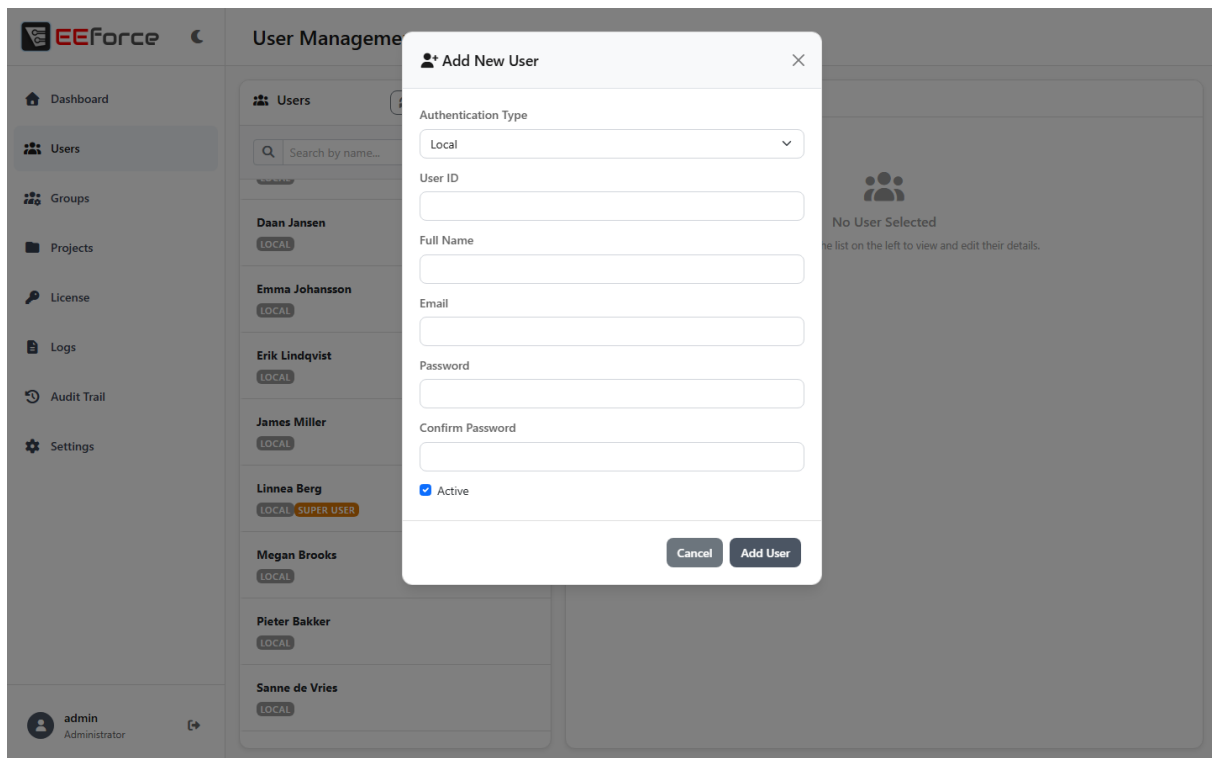
The Users page lists every EEforce account. Use the search box to narrow the list down; each account is tagged with how it signs in (**Local**, **LDAP** or **SSO**) and whether it is **Inactive** or an administrator account.

Select an account to edit it:

Field	Notes
User ID	Locked — the ID never changes
Full Name, Email	Free text; an LDAP or SSO account's name and e-mail come from the directory
Authentication Type	Local, LDAP or SSO (Managed Externally) — cannot be changed after the account is created
Active User	Untick to block sign-in while keeping the account
Group Memberships	Tick the groups this account belongs to

Save, **Change Password** and **Delete** act on the selected account.

To create an account, click **Add**:



The screenshot displays the EEforce User Management interface. On the left is a sidebar with navigation links: Dashboard, Users, Groups, Projects, License, Logs, Audit Trail, and Settings. The main area shows a list of users with a search bar and a table of user details. A modal dialog titled 'Add New User' is open in the center. The dialog contains the following fields and options:

- Authentication Type:** A dropdown menu currently set to 'Local'.
- User ID:** A text input field.
- Full Name:** A text input field.
- Email:** A text input field.
- Password:** A text input field.
- Confirm Password:** A text input field.
- Active:** A checkbox that is currently checked.

At the bottom of the dialog are two buttons: 'Cancel' and 'Add User'.

The dialog asks for the **Authentication Type** (**Local** or **LDAP** only), User ID, Full Name, Email, a password and, for LDAP, whether the account is active from the start.

::: info LDAP and SSO accounts An LDAP account's password always lives in Active Directory, and an SSO account has no EEforce password at all — but you can still set group memberships here for both. SSO accounts are not created on this page: they appear automatically on a user's first single sign-on, or through **SCIM provisioning**. :::

Groups

Groups bundle people together so you can give them project roles in one go. Select a group to see its details:

Field	Notes
Group ID	Locked — the ID never changes
Group Name	The name shown everywhere in EEforce
LDAP Group Identifier	Optional — links this group to a group in Active Directory, see LDAP / Active Directory
Member Count / Group Members	View and change who belongs to the group

Test LDAP Link and **Sync LDAP Members** appear next to the identifier once it is set; **Save** and **Delete** work as usual.

Built-in groups

Group	Purpose
All Users	Every account, kept up to date automatically
Project Administrators	Members get Manager access to every project
Project Creators	Members can create new projects

These groups are tagged **System** and cannot be deleted.

Projects

Project Access Management

Projects [Refresh]

Search project names...

- LX-7 Lamp Controller
- OTX-400 Spectrum Analyzer**
- RFX Indicator Board
- SP-12 Signal Processor

OTX-400 Spectrum Analyzer [Save] [Refresh]

PROJECT ID: OTX-400 Spectrum Analyzer

Role Assignments 4 ASSIGNED

Only assigned users and groups are listed here. Add or remove entries directly.

Viewer: read-only Contributor: check-out/in Managers: full control

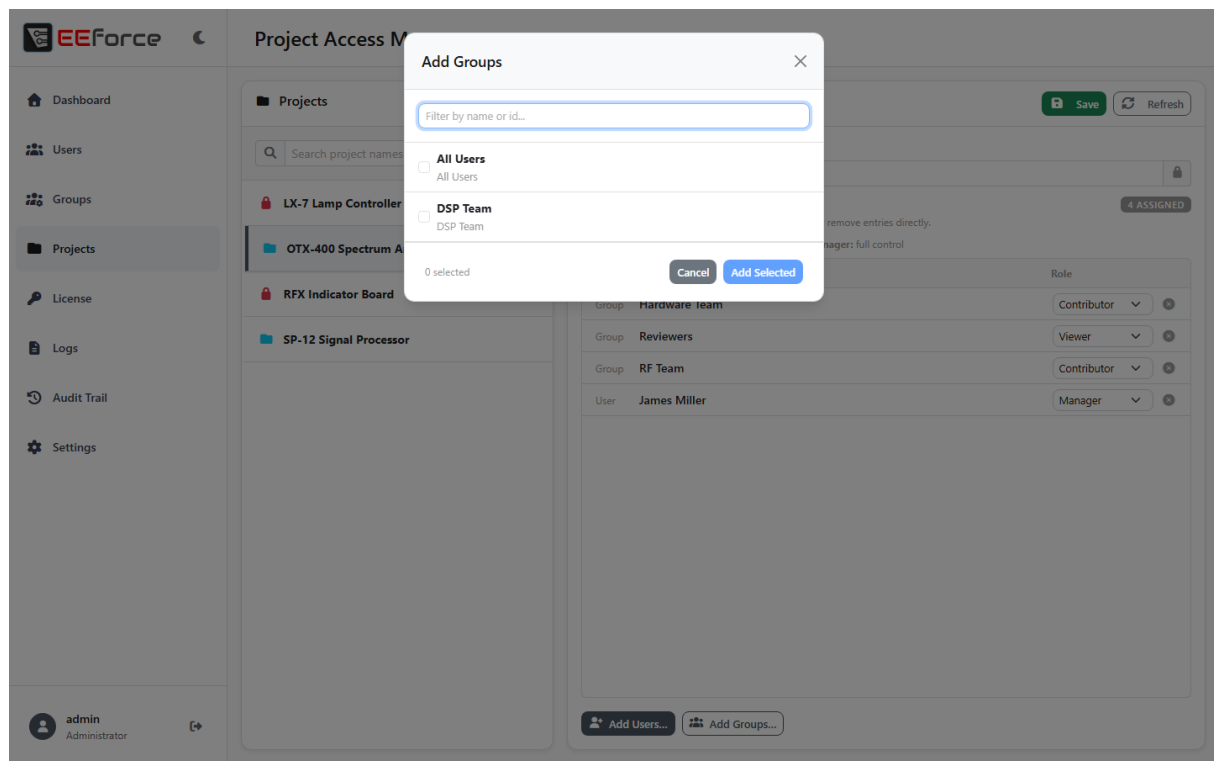
Type	Name	Role
Group	Hardware Team	Contributor
Group	Reviewers	Viewer
Group	RF Team	Contributor
User	James Miller	Manager

[Add Users...] [Add Groups...]

Projects lists your projects and their role assignments. Select a project to see who can do what:

Element	Notes
Role Assignments table	One row per person or group: Type (User/Group), Name, Role — with Remove to take the row away

Element	Notes
Add Users... / Add Groups...	Open a picker with a filter box; tick the people or groups to add
Save	Applies your changes



The roles are **Viewer** (read-only, can comment), **Contributor** (can check designs out and in) and **Manager** (full control). A project with a design checked out is marked with a lock icon in the list.

... warning Creating and deleting projects The web admin edits access to existing projects only. Creating, renaming and deleting projects stays in the desktop app — see [Working with Projects](#). A project's own Managers can also change its access in EEforce 365 — see [Managing Access](#). ...

Storage

Storage Assistant

VAULT - LOCAL
55.3 MB
5 projects - 46 files

TRASH
24.7 MB
3 items

RECLAIMABLE BY PRUNING
23.6 MB
Packages of older, unlocked versions

DISK C:
26.4 GB free
73.6 GB of 99.9 GB used

Projects | Trash | Refresh

Search projects... Select a project to see its designs and versions.

PROJECT	SIZE	DESIGNS	VERSIONS	RECLAIMABLE
OTX-400 Spectrum Analyzer	19.7 MB	3	6	7.9 MB >
SP-12 Signal Processor	17.0 MB	1	2	7.8 MB >
LX-7 Lamp Controller	14.1 MB	1	2	6.9 MB >
RFX Indicator Board	4.5 MB	1	2	995 KB >
.sys.Templates SYSTEM	530 B	0	0	— >

The **Storage** page is the **Storage Assistant**. It shows how much space the vault and the trash take, project by project and down to each version; prunes old versions in bulk; and lists everything that was deleted, pruned or moved away, so you can restore it or delete it for good. See [Storage Assistant](#).

Where the vault and the trash live is a setting, under [Settings](#) → **Storage**.

License

License Management

Licensing Active · Kestrel Dynamics Refresh

LICENSED FEATURES

EEFORCE SERVER · LDAP AUTHENTICATION · SCIM PROVISIONING · SINGLE SIGN-ON (SSO) · S3 INTEGRATION · AZURE BLOB STORAGE

Seats in use: 4 of 15 4 active users

Usage License File

EEforce for PADS Professional FLOATING V202608 Expires 27-Sept-2027 2 / 5

USER	MACHINE	TAKEN	LAST HEARTBEAT	SERIAL	ACTION
Sanne de Vries sanne.devries	XXXX-XXXX XXXX-XXXX	24-Sept-2026 12:03:45	24-Sept-2026 12:03:45 1m ago	T1	Drop
Erik Lindqvist erik.lindqvist	XXXX-XXXX XXXX-XXXX	24-Sept-2026 12:03:45	24-Sept-2026 12:03:45 1m ago	T2	Drop

EEforce for Xpedition FLOATING V202608 Expires 27-Sept-2027 2 / 5

USER	MACHINE	TAKEN	LAST HEARTBEAT	SERIAL	ACTION
James Miller james.miller	XXXX-XXXX XXXX-XXXX	24-Sept-2026 12:03:45	24-Sept-2026 12:03:45 1m ago	T6	Drop
Megan Brooks megan.brooks	XXXX-XXXX XXXX-XXXX	24-Sept-2026 12:03:45	24-Sept-2026 12:03:45 1m ago	T7	Drop

EEforce Web Seat FLOATING V202608 Expires 10-Oct-2027 0 / 5

Dropping a seat frees it immediately — it does not sign the user out, and an active client re-acquires one automatically. A seat is considered stale after 5 minutes without

admin Administrator

The License page shows the licence that is active on this server: the licensee, the **Licensed Features** your company has bought and how many seats are in use. It has two tabs:

Usage — one row per seat that is held right now, with the user, machine, when the seat was taken, its last heartbeat and the licence serial number. Use the **Drop** button to free a seat that was left behind — see [Managing seats day to day](#) for what that does.

License File — everything in the current licence file: licensee, Site ID, issue date, licence ID, hardware IDs and the full Licensed Seats table. **Update License File** uploads a renewed licence — it takes effect immediately, without restarting the server.

Read [Licensing](#) for how seats, renewals and expiry work.

Logs

EEforce

Dashboard

Users

Groups

Projects

License

Logs

Audit Trail

Settings

admin Administrator

Server Logs

Live Server Logs

Auto-refresh Log level Warning

Filter logs...

All Levels Refresh Clear

```
[2026-09-24 12:03:42] [DEFAULT] License T9 Verified: Yes
[2026-09-24 12:03:42] [DEFAULT] License T10 Verified: Yes
[2026-09-24 12:03:42] [DEFAULT] License T11 Verified: Yes
[2026-09-24 12:03:42] [DEFAULT] License T12 Verified: Yes
[2026-09-24 12:03:42] [DEFAULT] License T13 Verified: Yes
[2026-09-24 12:03:42] [DEFAULT] License T14 Verified: Yes
[2026-09-24 12:03:42] [DEFAULT] License T15 Verified: Yes
[2026-09-24 12:03:42] [DEFAULT] License T16 Verified: Yes
[2026-09-24 12:03:42] [DEFAULT] License Z1 Verified: Yes
[2026-09-24 12:03:42] [DEFAULT] License Z2 Verified: Yes
[2026-09-24 12:03:42] [DEFAULT] License Z3 Verified: Yes
[2026-09-24 12:03:42] [DEFAULT] License Z4 Verified: Yes
[2026-09-24 12:03:42] [DEFAULT] License Z5 Verified: Yes
[2026-09-24 12:03:42] [DEFAULT] Server MAC Address has been verified
[2026-09-24 12:03:42] [DEFAULT] License Version Check Completed
[2026-09-24 12:03:42] [DEFAULT] License File Successfully Verified: XXXX-XXXX
[2026-09-24 12:03:43] [DEFAULT] Looking for Template Project
[2026-09-24 12:03:43] [PROJECTCACHE] Warned: 5 projects loaded.
[2026-09-24 12:03:43] [DEFAULT] Listening on: http://127.0.0.1:80
[2026-09-24 12:03:44] [DEFAULT] Granting user 'sanne.devries' login request.
[2026-09-24 12:03:45] [DEFAULT] Granting user 'james.miller' login request.
[2026-09-24 12:03:45] [DEFAULT] Granting user 'erik.lindqvist' login request.
[2026-09-24 12:03:45] [DEFAULT] Granting user 'megan.brooks' login request.
```

Live server output

Bottom

Live Server Logs shows the server's own log stream — the place to look when something isn't working:

- **Auto-refresh** and **Refresh** keep the view current; **Clear** empties it.
- The **Log level** selector changes how much detail the server writes. Raise it while investigating and lower it again afterwards; at the most detailed level every request is logged.
- Filter by free text or by level, and use **Bottom** to jump to the newest lines.

The logs are for troubleshooting. To find out who did what, use the Audit Trail.

Audit Trail

- Dashboard
- Users
- Groups
- Projects
- License
- Logs
- Audit Trail**
- Settings

Audit Trail

From

To

User ID

Event Type

Resource

Outcome

Search

Search details, resource, or error message...

50 entries

0 failed logins

12 visible

13 pages

Apply

Reset

Export

LicenseConsume: 13

Login: 13

Logout: 7

LicenseRelease: 6

ApproveCheckout: 4

TIMESTAMP	EVENT	USER	RESOURCE	RESULT	DETAILS
9/24/2026, 12:04:50 PM	AdminLogin	admin	-	Success	-
9/24/2026, 12:03:45 PM	LicenseConsume	megan.brooks	T7	Success	machine=XXXX-XXXX, type=floating, version=202608
9/24/2026, 12:03:45 PM	Login	megan.brooks	-	Success	-
9/24/2026, 12:03:45 PM	LicenseConsume	erik.lindqvist	T2	Success	machine=XXXX-XXXX, type=floating, version=202608
9/24/2026, 12:03:45 PM	Login	erik.lindqvist	-	Success	-
9/24/2026, 12:03:45 PM	LicenseConsume	james.miller	T6	Success	machine=XXXX-XXXX, type=floating, version=202608
9/24/2026, 12:03:45 PM	Login	james.miller	-	Success	-
9/24/2026, 12:03:45 PM	LicenseConsume	sanne.devries	T1	Success	machine=XXXX-XXXX, type=floating, version=202608
9/24/2026, 12:03:44 PM	Login	sanne.devries	-	Success	-
9/24/2026, 10:21:34 AM	ApproveCheckout	james.miller	LX-7 Lamp Controller/LX-7 Driver Board	Success	version=16416bb7-8cb9-4079-be4b-fe4badf3fe94
9/24/2026, 10:21:32 AM	FileCheckout	james.miller	LX-7 Lamp Controller/LX-7 Driver Board	Success	version=16416bb7-8cb9-4079-be4b-fe4badf3fe94
9/24/2026, 10:21:24 AM	LicenseConsume	james.miller	T7	Success	machine=XXXX-XXXX, type=floating, version=202608

Page 1 of 13

Previous

Next

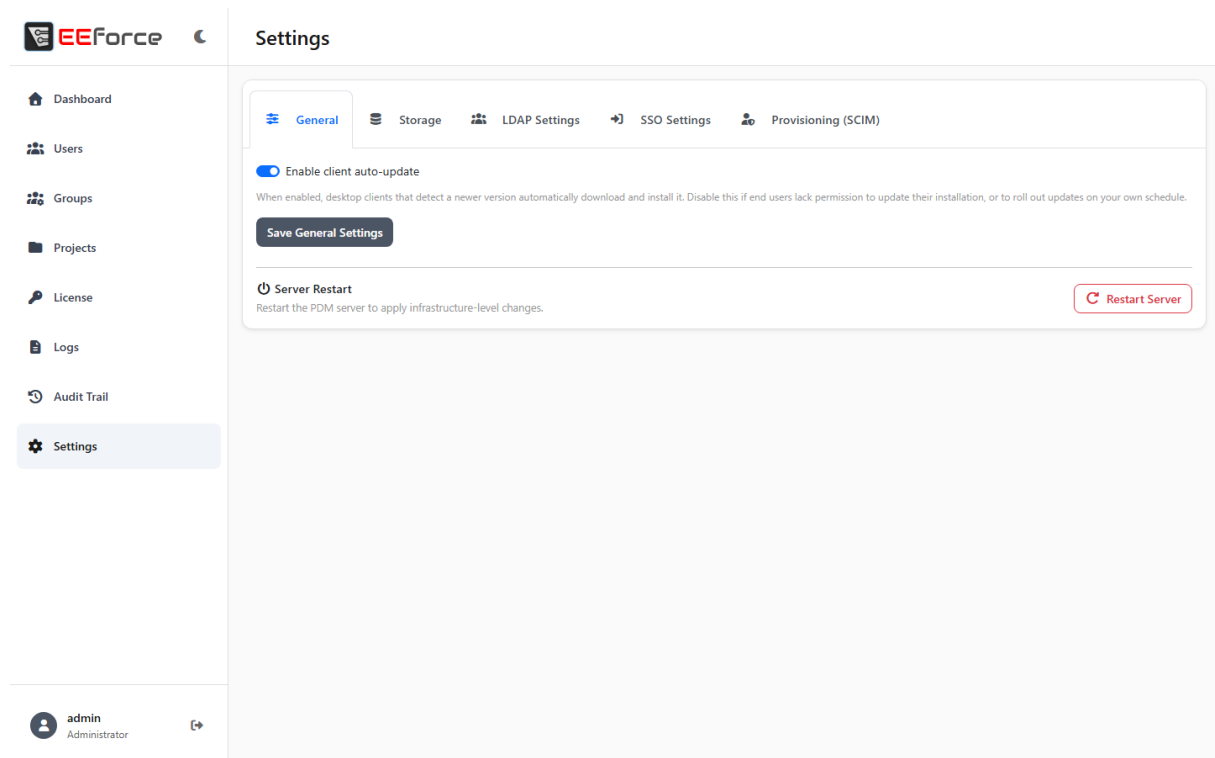
admin

Administrator

Every change made through EEforce is recorded here: sign-ins, check-outs and check-ins, designs copied or moved between projects, versions pruned, items restored from or deleted in the trash, account and permission changes, licence uploads and more. Filter by **From / To** dates, **User ID**, **Event Type**, **Resource**, **Outcome** (Success or Failed) or free text, then click **Apply**; **Reset** clears the filter.

The table lists Timestamp, Event, User, Resource, Result and Details, with paging underneath. **Export** downloads the filtered entries for a report or a ticket.

Settings



Server-wide settings are grouped into tabs:

Tab	What it holds
General	Enable client auto-update — when on, desktop apps that find a newer version download and install it at start-up. Turn it off if your users can't install software themselves, or to roll updates out on your own schedule.
Storage	Where the vault and its trash live: local folders, S3-compatible storage or Azure Blob. See Storage . What they hold is on the Storage page.
LDAP Settings	The connection to Active Directory. See LDAP / Active Directory .
SSO Settings	Single sign-on through your identity provider. See Single Sign-On (SSO) .
Provisioning (SCIM)	Let your identity provider manage user accounts. See User Provisioning (SCIM) .

Each tab has its own Save button.

Restarting the server

The bottom of every Settings tab has a **Server Restart** block:

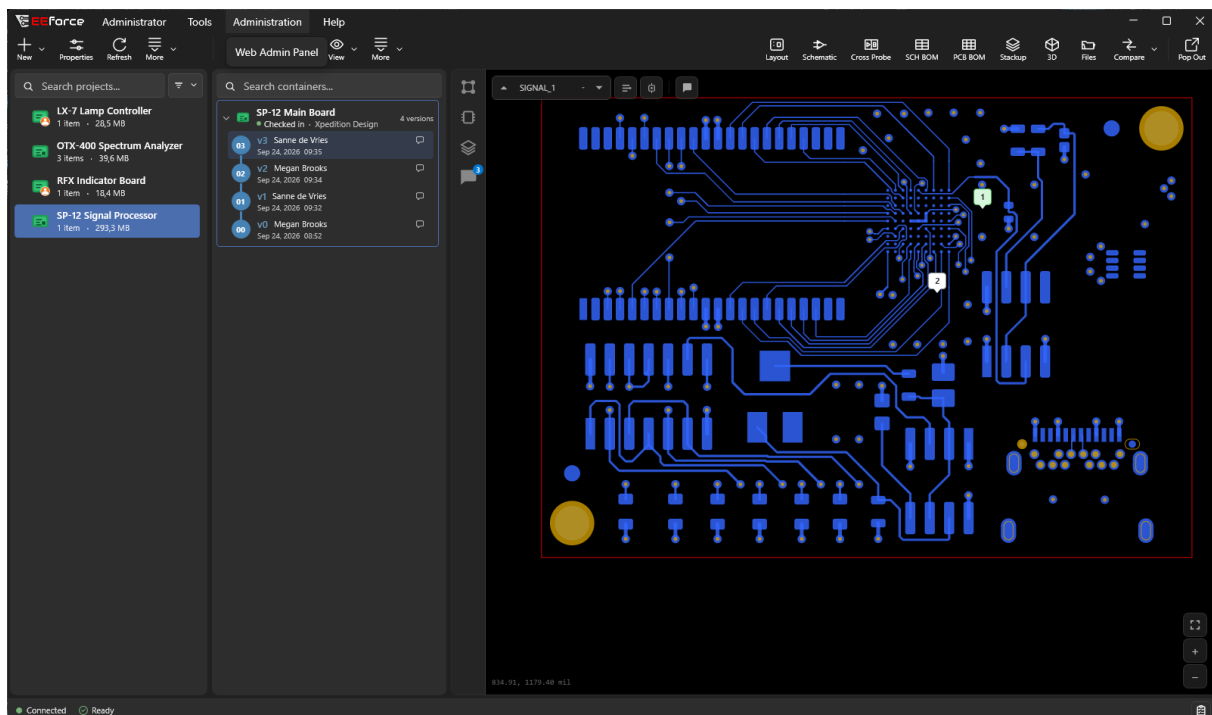


Click **Restart Server** and confirm. Some settings — storage, for example — tell you a restart is needed when you save them.



Restarting disconnects everyone who is signed in. Make sure nobody is in the middle of a check-in before you do it.

Administration from the desktop app



Almost everything an administrator does is in this console. The desktop app keeps only three administrator-only extras, and they appear for the built-in administrator account only:

- **Administration** → **Web Admin Panel** opens the console in your browser.
- Right-clicking a design that someone else has checked out offers **Super Admin** → **Cancel Check-out**, to release a check-out that was left behind — see [Checking Out & Checking In](#).
- In Settings, **Show invisible projects** makes projects that are normally hidden from your account appear in the app.

Logging out

Click the logout icon in the sidebar footer. You'll see a short *"Logged out."* message.

What's next

- [Setting Up the Server](#)
- [Licensing](#)
- [Storage](#)
- [Storage Assistant](#)
- [LDAP / Active Directory](#)
- [Single Sign-On \(SSO\)](#)
- [User Provisioning \(SCIM\)](#)

Storage

Everything your team checks in lives in the server's **vault**, with deleted items parked in its **trash** until you remove them for good. By default both are folders on the server's own disks, but EEforce can just as well keep them in S3-compatible cloud storage or Azure Blob Storage.

Storage is configured per server, in the web admin under **Settings** → **Storage**. Changing storage or its settings requires a server restart, and the page will tell you when one is needed.

To see how much space the vault and the trash take, prune old versions, or restore something from the trash, use the [Storage Assistant](#).

::: info Licensed feature The cloud back ends are licensed features: if your licence doesn't include S3-compatible storage or Azure Blob Storage, the option is shown locked. Contact your reseller to add it. :::

Choosing where the vault lives

Storage type	Use it for
Local Filesystem	The default. Fast local disks (NVMe/SSD) give the best check-in and check-out performance.

Storage type	Use it for
S3-Compatible Storage	AWS S3 or any S3-compatible service — for example object storage behind a gateway, or a cloud bucket your company already backs up.
Azure Blob Storage	Azure Blob containers, for teams standardised on Azure.

::: warning Network shares A shared folder on the LAN works as a local filesystem location, but check-ins and check-outs will be slower than on local disks. If you use one, make sure the server's application pool identity (see [Permissions for moved folders](#)) has full read/write access to it. :::

Local folders

The screenshot shows the EEforce Settings interface. On the left is a navigation menu with options: Dashboard, Users, Groups, Projects, License, Logs, Audit Trail, and Settings (selected). The main content area is titled 'Settings' and has tabs for General, Storage (selected), LDAP Settings, SSO Settings, and Provisioning (SCIM). Under the 'Storage' tab, the 'Storage Type' section has three radio buttons: 'Local Filesystem' (selected), 'S3-Compatible Storage', and 'Azure Blob Storage'. Below this is a note: 'Select where PDM stores its vault and trash data'. The 'Local Filesystem Configuration' section has two text input fields: 'Vault Folder' (containing 'C:\eeforce-docs-demo\vault') and 'Trash Folder' (containing 'C:\eeforce-docs-demo\trash'). A 'Save Storage Settings' button is below these fields. A light blue message box states: 'Changing storage type or its settings requires a server restart to take effect.' At the bottom, there is a 'Server Restart' section with a 'Restart Server' button and the text: 'Restart the PDM server to apply infrastructure-level changes.' The bottom left of the interface shows the user 'admin Administrator'.

1. Open **Settings** → **Storage**.
2. Make sure **Local Filesystem** is selected.
3. Set the **Vault Folder** and **Trash Folder**.

4. Click **Save Storage Settings**, then restart the server when asked.

The installer already creates sensible folders and grants the server's application pool access to them, so you only need to change these if you relocate storage.

Moving the vault to another folder

1. Stop the server (see [Setting Up the Server](#)).
2. Copy the vault folder — and the trash folder, if you use one — to the new location.
3. Point **Vault Folder** / **Trash Folder** at the new paths and save.
4. Set the folder permissions (see below) if the new location needs them.
5. Start the server and check that a project opens.

Permissions for moved folders

The server runs as the IIS application pool identity `IIS_APPPOOL\EEForceApplicationPool`. When the installer creates the vault and trash folders it grants that identity access itself; if you move folders afterwards, grant it **Full Control** on the new locations:

1. Right-click the folder → **Properties** → **Security** → **Edit...**
2. Add `IIS_APPPOOL\EEForceApplicationPool` and give it **Full Control**.

S3-compatible storage

The screenshot shows the EEForce Settings interface. On the left is a sidebar with navigation links: Dashboard, Users, Groups, Projects, License, Logs, Audit Trail, and Settings (highlighted). The main content area is titled 'Settings' and has tabs for General, Storage (selected), LDAP Settings, SSO Settings, and Provisioning (SCIM). Under the 'Storage' tab, the 'Storage Type' section has three radio buttons: 'Local Filesystem', 'S3-Compatible Storage' (selected), and 'Azure Blob Storage'. Below this is a note: 'Select where PDM stores its vault and trash data'. The 'S3 Configuration' section contains several input fields: 'Endpoint URL' (https://s3.eu-north-1.amazonaws.com), 'Access Key' (AKIAKESTRELEDEMO), 'Bucket Name' (kestrel-eeforce-vault), 'Secret Key' (Leave empty to keep current), 'Region' (eu-north-1), 'Vault Prefix' (vault), and 'Trash Prefix' (trash). There is a checkbox for 'Use Path-Style Addressing' which is checked. At the bottom of the configuration section are buttons for 'Test Connection' and 'Save Storage Settings'. A light blue banner below the buttons states: 'Changing storage type or its settings requires a server restart to take effect.' At the very bottom, there is a 'Server Restart' section with a 'Restart Server' button and the text 'Restart the PDM server to apply infrastructure-level changes.'

Field	Notes
Endpoint URL	The service endpoint, e.g. <code>https://s3.eu-north-1.amazonaws.com</code>
Bucket Name	The bucket to use
Region	The region the bucket lives in
Use Path-Style Addressing	Turn on for services that don't support virtual-hosted-style bucket addresses
Access Key / Secret Key	The credentials the server should use. A saved secret is never shown back — leave the box empty to keep the current one
Vault Prefix / Trash Prefix	The key prefixes (folders) inside the bucket for the vault and the trash

Click **Test Connection** to prove that the endpoint, credentials and bucket work together, then **Save Storage Settings**.



Give EEforce its own access key scoped to just this bucket. The keys are stored encrypted on the server.

Azure Blob Storage

The screenshot shows the EEforce Settings interface. On the left is a sidebar with navigation links: Dashboard, Users, Groups, Projects, License, Logs, Audit Trail, and Settings (which is highlighted). The main content area is titled 'Settings' and has tabs for General, Storage (selected), LDAP Settings, SSO Settings, and Provisioning (SCIM). Under the 'Storage' tab, there are sections for 'Storage Type' (with radio buttons for Local Filesystem, S3-Compatible Storage, and Azure Blob Storage, which is selected), 'Azure Blob Configuration' (with fields for Storage Account Name, Account Key, Container Name, Blob Endpoint (optional), Vault Prefix, and Trash Prefix), and a 'Server Restart' section. A 'Test Connection' button is present below the configuration fields. A blue notification bar states: 'Changing storage type or its settings requires a server restart to take effect.' The bottom of the page shows the user 'admin Administrator' and a 'Restart Server' button.

Field	Notes
Storage Account Name	The Azure storage account
Account Key	Its access key. A saved key is never shown back — leave the box empty to keep the current one
Container Name	The blob container to use. It must already exist
Blob Endpoint	Optional — only needed for non-standard endpoints
Vault Prefix / Trash Prefix	The blob prefixes for the vault and the trash

Click **Test Connection**, then **Save Storage Settings**.

The account key is stored encrypted at rest on the server.

Troubleshooting

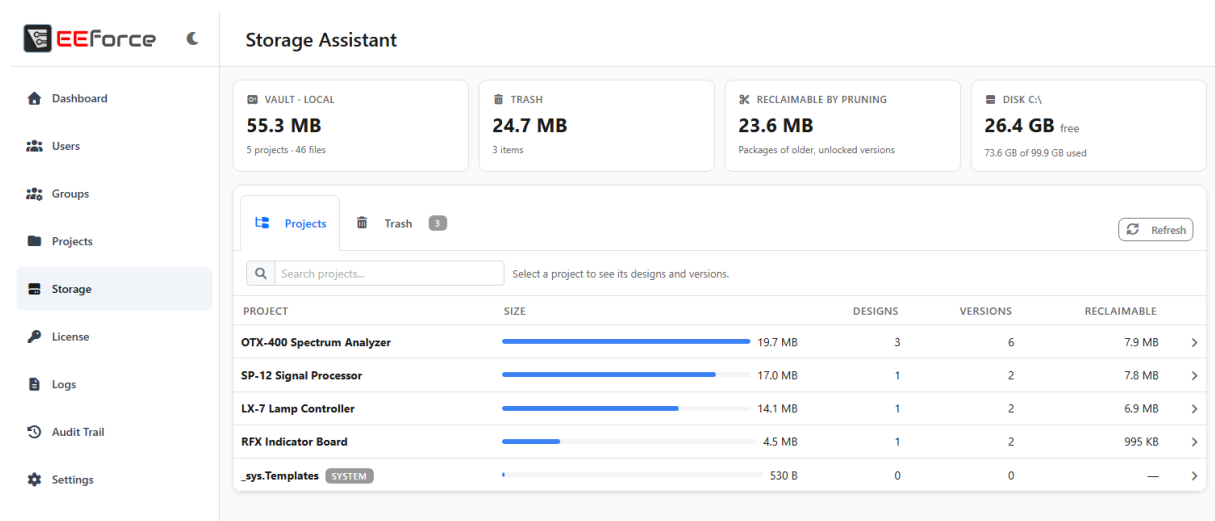
Symptom	Things to check
Test Connection fails (S3)	Endpoint and region spelling, that the bucket exists, and the key's permissions. Some services need path-style addressing.
Test Connection fails (Azure)	The container must exist before you save; check the account name and key.
“Licensed feature” lock	Your licence doesn't include this back end — contact your reseller.
Everyone sees an empty vault after a change	You are pointing at storage that doesn't hold your data yet. Move the vault contents to the new back end first, or point the setting back.
Check-ins and check-outs became slow	The storage moved to a slower device or a network share — see the warning above.

Storage Assistant

The **Storage Assistant** shows where the server's disk space goes, and gives it back. It measures the vault down to each project, design and version, prunes old versions in bulk, and holds the **trash**: everything that was deleted, pruned or moved away, ready to be restored or deleted for good.

Open it in the **web admin** under **Storage**. Like the rest of the web admin, it is for the server's administrator account only.

::: tip Storage Assistant or storage settings? The Storage Assistant works with what is *in* the vault. *Where* the vault and the trash live — local folders, S3-compatible storage or Azure Blob — is set under **Settings** → **Storage**. See [Storage](#). :::



The summary

The cards along the top give the picture at a glance:

Card	Shows
Vault	How much the vault holds, how many projects and files, and the storage type (for example Local).
Trash	How much the trash holds and how many items. Uploads that were started but never finished are counted here too.
Reclaimable by pruning	What pruning would free: the packages of older versions that aren't locked.
Disk	Free space on the disk the vault is on, and how much of it is used. The bar turns red when less than a tenth is free. Shown for local storage only.

Click **Refresh** to measure again.

Where the space goes

The **Projects** tab lists every project with its size, its number of designs and versions, and how much pruning would free in it. Type in the search box to find a project. The templates project, `_sys`.

[Templates](#), is marked **System**.

Click a project to see its designs, largest first. The largest one opens straight away; click any other to open it. Each design shows its folder, its number of versions, the size of its comments and how much pruning would free. A badge names its kind when it isn't a board, and shows who has it checked out.

Each version shows:

- its number, with badges for **Latest**, its tag, a lock when it is locked, and **Pruned** when its package is already gone
- when it was checked in and by whom, and its check-in comment
- the size of its **Package** (the design files a check-out downloads), its **Previews**, and the **Total**

All projects takes you back to the list.

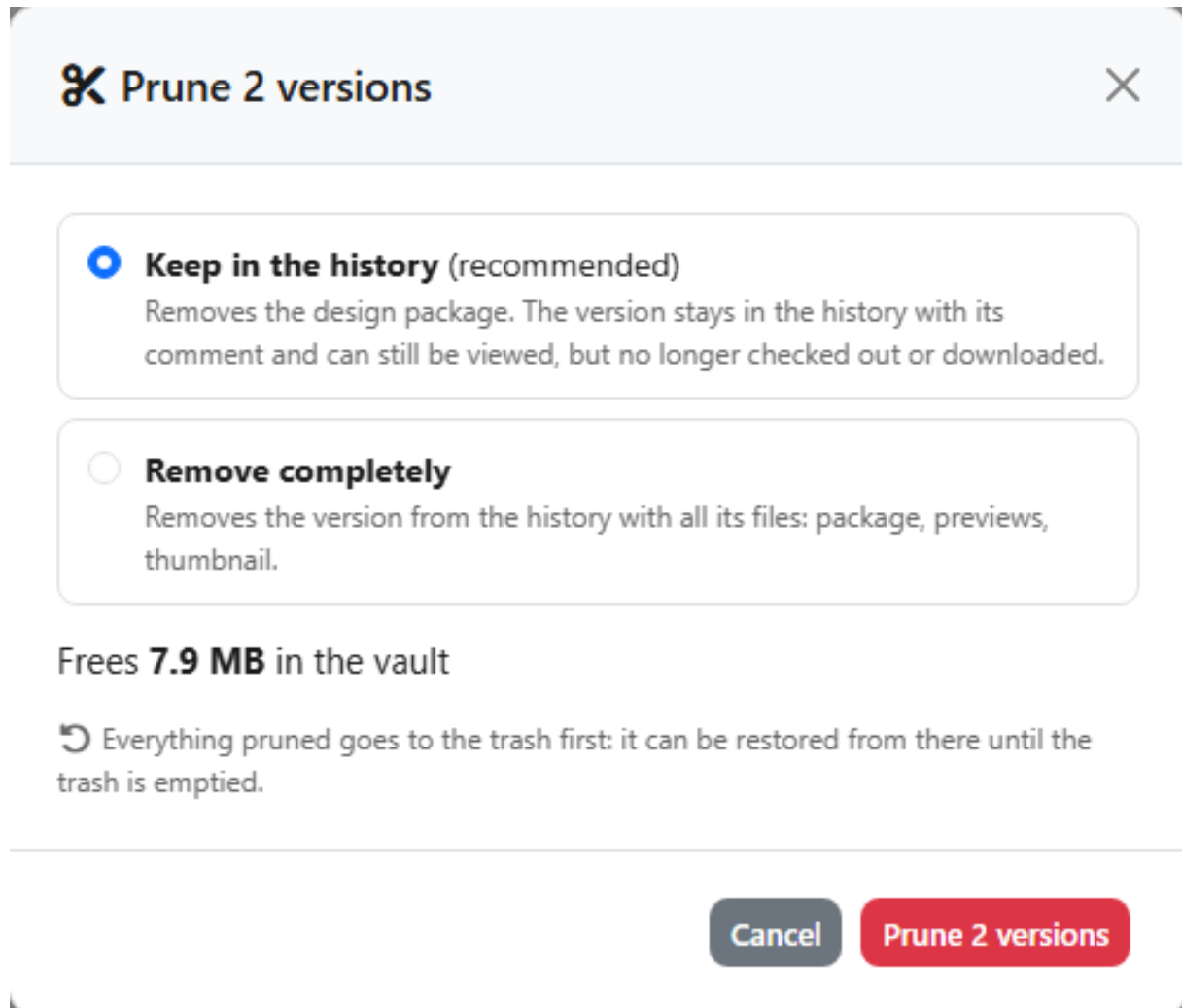
Pruning versions in bulk

Pruning removes a version's package — usually by far its largest part — while the version stays in the design's history. In the desktop app a project Manager prunes one version at a time (see [Managing Versions](#)); here you can prune many at once, across a whole project.

1. Open a project.
2. Tick the versions to prune. The box in a design's header ticks all of its versions. Locked versions can't be ticked.

To pick the usual candidates quickly, click **Select older versions**: it ticks every version in the project that still has its package and is neither locked nor its design's latest. **Select the older versions of design**, under a design's versions, does the same for one design.

3. The bar at the bottom shows how many versions are selected and how big their packages are. Click **Prune...**
4. Choose how far to go, and confirm:



Choice	What happens
Keep in the history (recommended)	Removes the design package. The version stays in the history with its comment and can still be previewed, but it can no longer be checked out or downloaded.

Choice	What happens
Remove completely	Removes the version from the history together with all its files: package, previews and thumbnail.

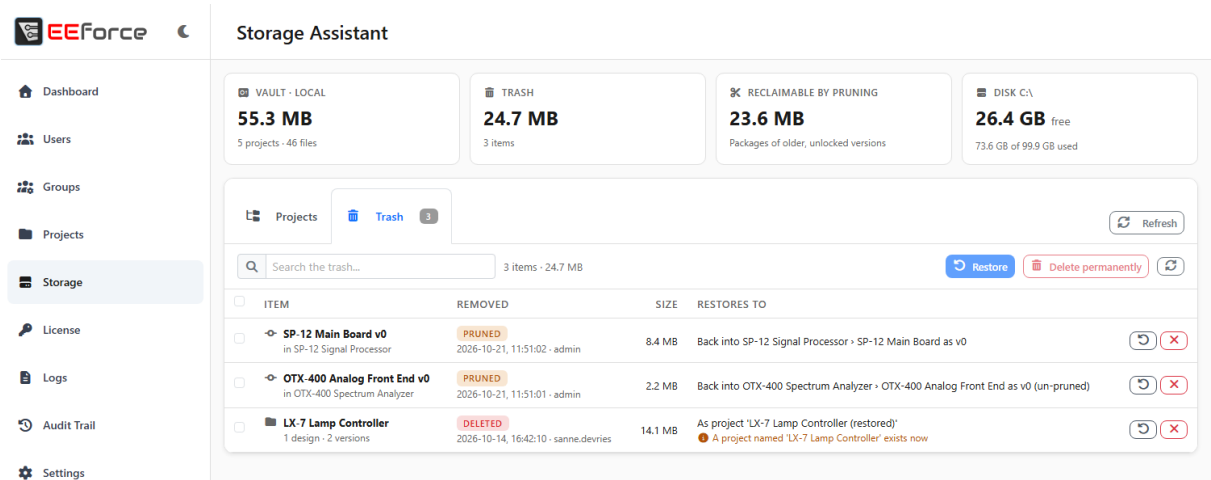
The dialog shows how much space the prune frees. It warns you when a selected version is its design’s latest; removing that one completely lets the design’s next check-in take its number again. Versions that are already pruned are skipped when you keep them in the history; choose **Remove completely** to take them out of the history too.

When the prune is done, a message says how many versions were pruned and how much space was freed, and lists any that were skipped and why.

::: info Nothing is lost straight away Everything pruned goes to the trash first. Until the trash item is deleted, you can restore it. :::

The trash

Projects and designs that are deleted, versions that are pruned (here or in the desktop app), and designs that are moved to another project all leave their files in the **Trash** tab. The badge on the tab counts the items.



Column	Shows
Item	The project, design or version, and the project it was in.

Column	Shows
Removed	Deleted, Pruned or Moved , when, and by whom.
Size	How much space it takes in the trash.
Restores to	Exactly where a restore would put it. A note explains when that isn't the place it came from.

Type in the search box to filter the list by name, project, person or kind.

Restoring

Click the restore button on an item, or tick several items and click **Restore**. A confirmation lists each item with where it will go. Restored items appear for everyone straight away, in the desktop app and in EEforce 365.

An item goes back where it was whenever that place is free. When it isn't, EEforce finds the nearest sensible place and tells you in **Restores to** before you confirm:

Situation	Where it goes
A pruned version that was kept in the history	Back into its design under its own number, with its package again (un-pruned).
A version whose design still exists, and whose number is free	Back into its design under its own number.
A version whose number has been taken by a newer check-in, or whose design is gone	A design of its own, <i>design</i> (restored vN), with the version as its v0, in the same project.
A design whose name is free	Back into its project, checked in. It returns to its folder if the folder still exists, otherwise to the top of the project.
A design whose name has been taken since	Into its project as <i>name</i> (restored).
A design whose project has been deleted	Re-creates the project, with the design in it.
A project whose name is free	Back as the same project, with its access list.

Situation	Where it goes
A project whose name has been taken since	As <i>name</i> (restored) .

A **Moved** item is the copy of a design's files that stays behind when the design is moved to another project; the list says where it went. Restoring it puts the design back into the project it came from, as a design of its own. The moved design stays where it went, so afterwards both projects have one.

Items without a readable project snapshot can't be restored; **Restores to** says so. You can still delete them.

Deleting for good

Click the delete button on an item, or tick several and click **Delete permanently**. The confirmation shows how much space this frees.



Deleting from the trash **cannot be undone**. Delete only what nobody will need again — once it's gone, not even an administrator can bring it back.

Read-only mode

While the server is in **read-only mode** because its licence has expired, the Storage Assistant still measures storage and lists the trash, and you can still delete trash items to free space. Pruning and restoring change projects, so they wait until a valid licence is in place.

In the Audit Trail

Every prune, restore and permanent delete made here is recorded in the **Audit Trail**, with what it was and how much space it involved.

What's next

- **Storage** — where the vault and the trash live
- **Web Admin Interface** — the rest of the console
- **Managing Versions** — locking and pruning in the desktop app

LDAP / Active Directory

EEforce can use your company's Active Directory (or any LDAP-compatible directory) for sign-in and, if you want, keep group memberships in step with it. People then use their normal corporate credentials instead of a separate EEforce password.

LDAP integration gives you:

- **Authentication** — users sign in with their AD username and password
- **Auto-registration** — an EEforce account is created automatically the first time an AD user signs in
- **Group synchronisation** — link EEforce groups to AD groups and let EEforce keep the memberships up to date on a schedule
- **SSL support** — secure LDAP (LDAPS) connections

⋮ info Licensed feature LDAP sign-in is a licensed feature. If your licence doesn't include it, the settings page shows a licence notice — contact your reseller to add it. ⋮

How sign-in works

```
1 User enters AD credentials in EEforce (desktop app or EEforce 365)
2   -> EEforce Server binds to AD using the service account
3   -> Server validates the user's credentials against AD
4   -> If auto-register is enabled and the user is new, an account is
      created
5   -> User is signed in
```

Passwords are never stored in EEforce — authentication always goes through the directory. Group membership sync happens separately, on a schedule (see below).

Setting it up

1. Create a service account in AD

Create a service account with read permissions:

- No special administrative rights needed.
- Set the password to never expire (or manage its rotation).
- Example: `svc-eeforce-ldap@kestrel.local`

::: warning Service account requirements The service account needs **read access** to user and group objects in Active Directory — no write permissions. Use a dedicated service account with the least privileges that work. :::

2. Configure LDAP in EEforce

Open the **web admin** (your server address followed by `/admin`) and go to **Settings** → **LDAP Settings**:

The screenshot shows the EEforce web admin interface. The left sidebar contains navigation links: Dashboard, Users, Groups, Projects, License, Logs, Audit Trail, and Settings. The main content area is titled 'Settings' and has tabs for General, Storage, LDAP Settings, SSO Settings, and Provisioning (SCIM). The 'LDAP Settings' tab is selected. It contains the following fields and options:

- Domain:** A text input field containing 'kestrel.local'.
- Use Secure Socket Layer (SSL):** A checked checkbox.
- Service Account:** A text input field containing 'svc-eeforce-ldap'.
- Service Account Password:** A text input field with a placeholder 'Leave empty to keep current password'.
- Auto-register LDAP users on first login:** A checked checkbox.
- Group Sync Interval:** A dropdown menu set to 'Hourly'.
- Test LDAP Connection:** A section with radio buttons for 'Use saved configuration' (selected) and 'Use configuration from form'. Below it is a 'Test Mode' dropdown set to 'Service Account Connection'.
- Test Service Account:** A button to test the service account connection.
- Save LDAP Settings:** A button to save the current settings.
- Sync All Groups Now:** A button to sync all groups.
- Server Restart:** A button to restart the PDM server to apply infrastructure-level changes.

At the bottom left, the user 'admin' (Administrator) is logged in.

Setting	Description	Example
Domain	The LDAP/AD domain to authenticate against	<code>kestrel.local</code>
Use SSL	Connect via LDAPS (port 636) instead of plain LDAP (port 389)	On/Off
Service Account	The account EEforce uses to query the directory	<code>svc-eeforce-ldap</code>
Service Account Password	Its password — stored encrypted, and never shown back	

Setting	Description	Example
Auto-register LDAP users on first login	Create an EEforce account automatically when an unknown LDAP user signs in successfully	On/Off
Group Sync Interval	How often linked groups are synchronised: Every 30 Minutes, Hourly, Every 4 Hours or Daily	Hourly

Click **Save LDAP Settings** when you're done. A group with an LDAP identifier is also synced straight away when an LDAP user is added to it, and you can force a full sync any time with **Sync All Groups Now**, right below the settings.

3. Test the connection

The test panel at the bottom of the page verifies the configuration before your users do:

Test Mode	What it checks
Service Account Connection	That the service account can bind to the directory at all
User Lookup	That a specific user can be found, and shows their details
User Login	A full authentication test with a user's own credentials



Always run **Service Account Connection** first. If that fails, check the domain name, the service account credentials and network connectivity to a domain controller before going further.

4. Auto-registration

With auto-registration on, anyone who authenticates against AD gets an EEforce account on the spot. With it off, an administrator must create the account (as a Local or LDAP account) before the person can sign in.

Group synchronisation

An EEforce group can be linked to an AD group. From then on, EEforce keeps that group's LDAP-managed membership matching AD — people who are in the AD group are added, and people who left it are removed.

Linking a group

1. Open **Groups** in the web admin and select (or create) the group.
2. Set its **LDAP Group Identifier** to one of:
 - the distinguished name: `CN=Hardware Team,OU=Groups,DC=kestrel,DC=local`
 - the sAMAccountName: `Hardware Team`
 - the common name: `Hardware Team`
3. Click **Save**. The **Test LDAP Link** and **Sync LDAP Members** buttons appear next to the identifier — use them to check the link and run a one-off sync of just this group.

The screenshot shows the EEforce web admin interface for a group named "Hardware Team". At the top, there are buttons for "Test LDAP Link", "Sync LDAP Members", "Save", and "Delete". The main content is divided into two sections: "Group Information" and "Group Members".

Group Information

- Group ID:** Hardware Team
- Group Name:** Hardware Team
- LDAP Group Identifier:** CN=Hardware Team,OU=Groups,DC=kestrel,DC=local. Below this field, a note states: "If set, LDAP logins can update this group automatically and the LDAP buttons will use it for lookup."
- Member Count:** 2 members

Group Members

A search bar "Search users to add..." is present. Below it, a list of users is shown with checkboxes and "LOCAL" labels:

- ☐ Administrator LOCAL
- ☐ Ashley Parker LOCAL
- ☐ Daan Jansen LOCAL
- ☐ Emma Johansson LOCAL
- ☐ Erik Lindqvist LOCAL
- ☒ James Miller LOCAL

The identifier is matched flexibly: EEforce tries the full DN, the sAMAccountName and the CN.

When synchronisation runs

- Every **Group Sync Interval** (every 30 minutes, hourly, every 4 hours or daily — hourly by default), all linked groups are synchronised.
- **Sync All Groups Now** on the LDAP settings page runs the same sync immediately.
- A group is also synced immediately when a new LDAP user is added to it.
- **Sync LDAP Members** on a group's page refreshes that one group.

Example configuration

EEforce group	LDAP Group Identifier	Effect
Hardware Team	<code>CN=HW-Engineers,OU=Teams,DC=kestrel,DC=local</code>	AD members of HW-Engineers are members of Hardware Team
Project Administrators	<code>EEforce-Admins</code>	AD members of EEforce-Admins get Manager access to every project
Project Creators	<code>EEforce-Creators</code>	AD members can create new projects



Treat the membership of a linked group as managed by Active Directory — anything you change by hand is corrected at the next sync.

User lifecycle

A new LDAP user (auto-registration on)

1. The user signs in to EEforce with their AD credentials.
2. The server authenticates against AD.
3. An EEforce account is created: User ID = AD username, display name = AD display name, marked as LDAP-authenticated.

4. If the user was added to a linked group, that group syncs immediately.
5. The user is signed in.

An existing LDAP user

1. The user signs in with their AD credentials.
2. The server authenticates against AD.
3. The user is signed in; group memberships follow the sync schedule.

When someone leaves

- A disabled or deleted AD account can no longer sign in — authentication fails.
- Their EEforce account remains (their name stays on the work they did) until you deactivate or delete it on the Users page.

SSL / LDAPS

For secure connections:

1. Make sure your domain controllers have a valid certificate for LDAPS (port 636).
2. Turn **Use SSL** on in EEforce's LDAP settings.
3. If your organisation uses a private certificate authority, install its root certificate on the EEforce server.



Plain LDAP (port 389) sends credentials across the network in clear text. Use LDAPS in production.

Troubleshooting

Issue	Possible cause	Resolution
Service account test fails	Wrong domain or credentials	Check the domain name and the account; try the <code>DOMAIN\user</code> form

Issue	Possible cause	Resolution
User lookup finds nothing	User not in the expected place	The search covers the whole domain tree — check the spelling of the username
Group members don't update	Identifier not set, or the schedule hasn't run yet	Set the LDAP Group Identifier, click Sync LDAP Members , and check the Group Sync Interval
SSL connection fails	Certificate not trusted	Install the AD certificate authority's root certificate on the server
Auto-registration doesn't work	Setting is off	Turn on Auto-register LDAP users on first login
Sign-in is slow	DNS resolution	Make sure the server can resolve the domain name quickly

Single Sign-On (SSO)

EEforce supports sign-in through an OpenID Connect (OIDC) identity provider, so people can use their company account — with whatever multi-factor authentication your company already enforces — instead of an EEforce password. It works for the desktop app **and** the EEforce 365 web portal.

Anything that speaks OIDC works: Entra ID (Azure AD), Keycloak, Okta, Auth0 and others.

::: info Licensed feature SSO is a licensed feature. If your licence doesn't include it, the settings page shows a licence notice — contact your reseller to add it. :::

How it works

1. You register EEforce as an application at your identity provider and give its details to EEforce: the provider's **Authority / Issuer URL**, a **Client ID** and a **Client Secret**.
2. From the issuer URL EEforce discovers the rest by itself — where to send users to sign in, and where to fetch the provider's signing keys (the provider's *OIDC discovery document*). The **Authorization URL** and **Token URL** fields are filled in from that discovery; you only override them if a provider misbehaves.

3. When someone clicks **Sign in with SSO**, EEforce opens the provider's sign-in page and uses the Authorization Code flow with PKCE. The token that comes back is validated against the provider's published keys before the user is let in.
4. The first time a user signs in this way, EEforce creates their account from the name and e-mail claims in the token. No password is stored.

Before you start

You will need:

- An OIDC identity provider, reachable from both the EEforce server and your users' machines.
- An application registered in it, with:
 - a Client ID and Client Secret;
 - **both** redirect URIs (exact strings, no wildcards):
 - * the desktop app's redirect, <http://localhost:8001> — the value shown in EEforce's **Redirect URL** field, keep the two in sync;
 - * the web portal's callback, <https://<SERVER-ADDRESS>/365/sso/callback>;
 - the Authorization Code grant enabled;
 - the scopes [openid](#), [profile](#) and [email](#).

Configuring SSO

SSO is configured in the **web admin** (your server address followed by [/admin](#)). Go to **Settings** → **SSO Settings**:

EEforce Settings

General Storage LDAP Settings **SSO Settings** Provisioning (SCIM)

☒ Enable SSO Authentication

Authority / Issuer URL

Standard OpenID Connect issuer. The authorization, token, userinfo, and signing-key endpoints are discovered automatically from <authority>/.well-known/openid-configuration. Examples — Entra ID: https://login.microsoftonline.com/<tenant>/v2.0, Google: https://accounts.google.com, Okta: https://<org>.okta.com, Keycloak: https://<host>/realms/<realm>.

Client ID
 Client Secret

Authorization URL (auto-discovered)

Token URL (auto-discovered)

Redirect URL
 Scope

Email Address Scope

Client Sign-In Window
☒ Embedded window — seamless sign-in on domain machines (Entra Seamless SSO / ADFS / Kerberos), closes automatically
☐ External browser — required for providers that block embedded windows (e.g. Google)

Save SSO Settings

Restart Server

Setting	Description	Example
Enable SSO Authentication	Master switch	On/Off
Authority / Issuer URL	The provider's issuer URL — this is what everything is discovered from	<code>https://sso.kestrel.local/realms/kestrel</code>
Client ID	The application's client ID at the provider	<code>eeforce</code>
Client Secret	Its client secret	
Authorization URL / Token URL	Filled in automatically from discovery — override only if needed	
Redirect URL	The desktop app's redirect URI; must match the provider exactly	<code>http://localhost:8001</code>
Scope	The scopes to request	<code>openid profile email</code>

Setting	Description	Example
Email Address Scope	The token claim EEforce uses as the user's e-mail/identifier	upn (the default), email , preferred_username
Client Sign-In Window	Where the provider's page opens: Embedded window (inside EEforce) or External browser	Embedded window

Click **Save SSO Settings**, then test with a real sign-in.

Registering EEforce at your identity provider

Keycloak

1. In the Keycloak admin console, select your realm and create a client.
2. Client ID [eeforce](#), protocol [openid-connect](#), access type [confidential](#).
3. Valid redirect URIs: [http://localhost:8001/*](#) and [https://<SERVER-ADDRESS>/365/sso/callback](#).
4. Copy the client secret from the **Credentials** tab. The issuer URL is [https://<keycloak-host>/realms/<realm>](#).

Entra ID (Azure AD)

1. Register an application named EEforce.
2. Add both redirect URIs (platform type *Mobile and desktop applications* for the localhost one, *Web* for the portal callback).
3. Create a client secret under **Certificates & secrets** and note the application (client) ID.
4. Use [https://login.microsoftonline.com/<tenant-id>/v2.0](#) as the issuer.

Okta

1. Create an OIDC application (Web and/or Native), grant type Authorization Code.
2. Set both sign-in redirect URIs.
3. Copy the client ID and secret; the issuer is [https://<company>.okta.com](#).

What your users see

- On the desktop app's sign-in screen, a **Sign in with SSO** button appears once SSO is enabled. Ticking **Remember my user name** during an SSO sign-in turns on automatic sign-in at the next start — undo it with **Remove Automatic Login**. Full details: [Signing In](#).
- EEforce 365 shows the same button on its sign-in page.
- SSO users cannot change an EEforce password (there isn't one) and cannot be given one; their group memberships and project roles work exactly like everyone else's.
- Want accounts to exist *before* the first sign-in? Use [SCIM provisioning](#) and your provider will keep them up to date.

Troubleshooting

Issue	Possible cause	Resolution
No SSO button on the sign-in screen	SSO not enabled, or not saved	Check Enable SSO Authentication and save
"invalid_client" from the provider	Wrong client ID or secret	Copy both again from the provider's application page
Redirect error or "invalid redirect URI"	The redirect URI doesn't match the provider exactly	Register both URIs; check for a missing trailing slash or a http/https difference
Discovery fails or times out	Wrong Authority / Issuer URL , or the server can't reach the provider	Use the issuer URL itself (not the authorize endpoint) and verify the server's network access to it
User's e-mail or ID looks wrong	Wrong claim mapped	Adjust Email Address Scope (upn , email , preferred_username)
Sign-in works but no account is created	The token has no usable subject/name claims	Check the provider returns the standard OIDC claims for this client

User Provisioning (SCIM)

SCIM (System for Cross-domain Identity Management) lets your identity provider manage EEforce accounts for you: when someone joins, their account appears before they ever sign in; when they change teams or leave, their details or their access are updated automatically. EEforce exposes a SCIM endpoint that Entra ID, Okta and other providers can push to.

SCIM works hand in hand with [Single Sign-On \(SSO\)](#) — provisioned users sign in with single sign-on, so you never create passwords for them.

::: info Licensed feature SCIM provisioning is a licensed feature. If your licence doesn't include it, the settings page shows a licence notice — contact your reseller to add it. :::

How it works

1. You generate a **bearer token** in EEforce and give it, together with the SCIM base URL, to your identity provider.
2. The provider pushes user changes to EEforce: new accounts are created, name and e-mail changes are applied, and people who leave are deactivated.
3. A **DELETE** from the provider does not erase the account — the user is deactivated instead, so their name stays on everything they did. You can reactivate the account later, or delete it deliberately on the [Users page](#).
4. Every SCIM change is written to the [Audit Trail](#).

Setting it up

The screenshot shows the EEforce web admin interface. On the left is a sidebar with navigation links: Dashboard, Users, Groups, Projects, License, Logs, Audit Trail, and Settings. The main content area is titled 'Settings' and has several tabs: General, Storage, LDAP Settings, SSO Settings, and Provisioning (SCIM). The 'Provisioning (SCIM)' tab is active. It contains a toggle for 'Enable SCIM provisioning' which is currently 'DISABLED'. A yellow warning box states 'Generate a bearer token before enabling SCIM.' Below this, the 'SCIM Base URL' is set to 'http://eeforce.kestrel.local/scim/v2'. The 'Bearer Token' section shows 'No bearer token yet' and a 'Generate Bearer Token' button. A blue information box lists supported operations: create, list, get, update, and deactivate users. At the bottom, there is a 'Server Restart' section with a 'Restart Server' button.

1. Open the web admin and go to **Settings** → **Provisioning (SCIM)**.
2. Click **Generate Bearer Token**. The token is shown **once** — copy it now and keep it in your password manager. If it leaks or is lost, **Regenerate Bearer Token** issues a new one and invalidates the old.
3. Note the **SCIM Base URL** (<https://<SERVER-ADDRESS>/scim/v2>).
4. Add a provisioning connection in your identity provider:

Entra ID — in the Enterprise Application for EEforce, open **Provisioning**, set the mode to **Automatic**, paste the SCIM Base URL as the **Tenant URL** and the bearer token as the **Secret Token**, then **Test Connection** and start provisioning.

Okta — in the EEforce app, open **Provisioning** → **Integration**, enable API integration, and paste the SCIM Base URL and bearer token.
5. Back in EEforce, turn **Enable SCIM provisioning** on. The toggle stays inactive until a token exists.



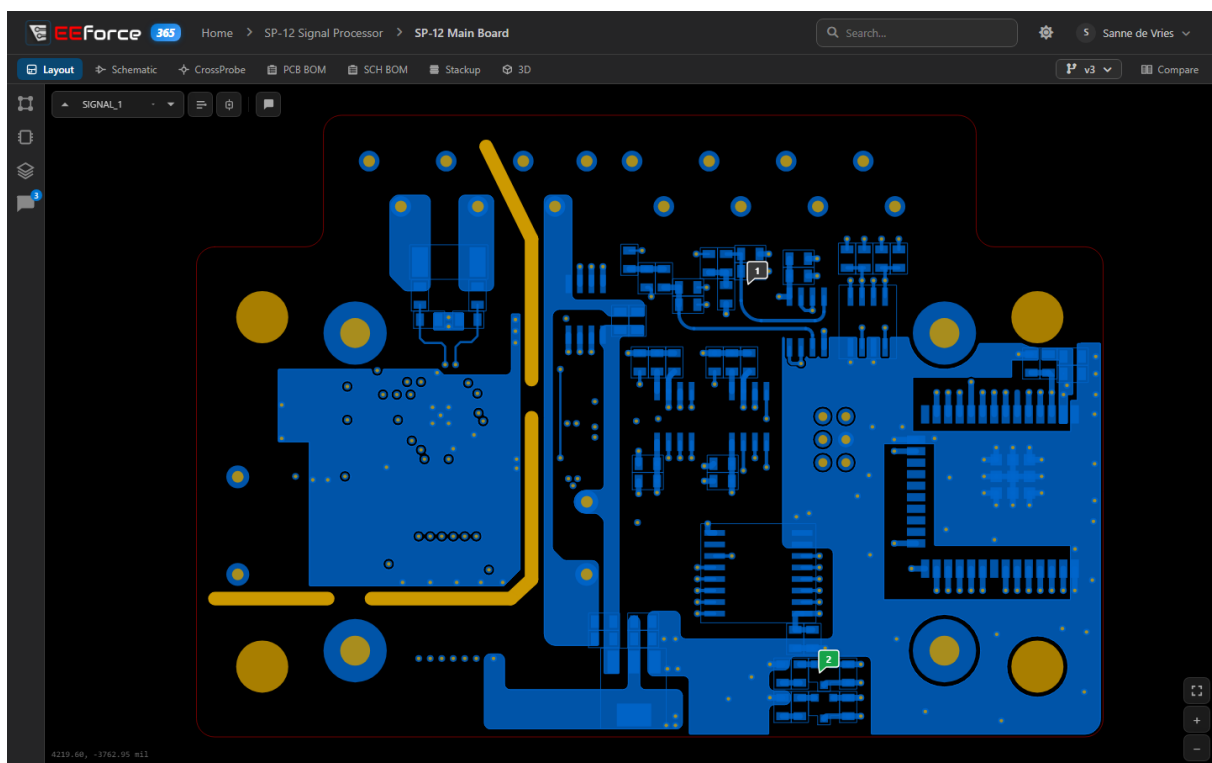
Regenerating the token breaks the connection to your identity provider until you paste the new token there.

Day-to-day

- New hires appear in **Users** as soon as the provider pushes them — no manual step.
- People who leave are deactivated at the provider's pace; deactivated users cannot sign in and don't count against seats.
- If provisioning stops working after an identity provider change, check **Test Connection** there first, then compare the token stored in the provider with EEforce.

Reviewing in the Browser

Sometimes you need to look at a design somewhere EEforce isn't installed — a customer site, a home laptop, a colleague's PC. **EEforce 365** is EEforce in your web browser: sign in with your usual account, open any project you have access to, and review layouts, schematics and comments. Nothing to install, and no licence seat is used.



::: tip Works alongside the app You can keep EEforce 365 open while you are signed in to the desktop app — a browser session doesn't count as your one session, and it doesn't use a licence seat. What you can see and do follows the same **roles** as in the app: Viewer access is enough to look, comment and reply. :::

What you can do

- **Sign in** — at your server's address followed by /365
- **Find a project or board** — browse, sort and search everything you can see
- **View a design** — layout, schematic, cross-probe, BOMs, stack-up and 3D, in any version
- **Compare** — two versions of a board, or a board with another board
- **Comment and reply** — the same conversations as in the app and the design tools
- **Manage who has access** — if you are a Manager of the project

Always up to date

EEforce 365 follows the server as you work. When someone checks a design in or out, or changes who has access to a project — in EEforce 365, the desktop app or the web admin — the page you're looking at updates by itself: the project list, the boards in a project, and the version list of the board you have open. There is nothing to reload.

If a project you have open is deleted, or your access to it is removed, the page tells you so and offers the way back to your projects.

Sharing a link

Every page has its own address: the home page, a project, a board — down to the exact version, and even a comparison. Copy the address from the browser's address bar and send it to a colleague; the link opens on the same design for anyone with access.

Light or dark

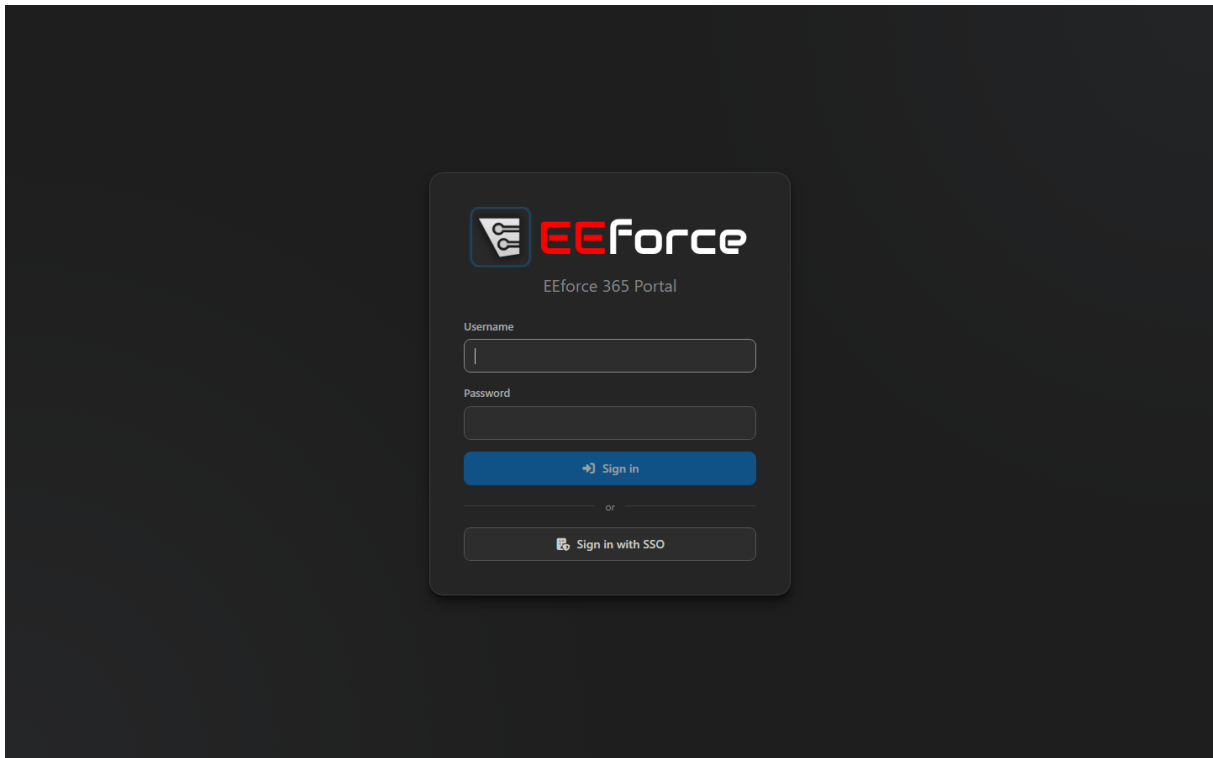
The sun and moon button in the top bar switches between a light and a dark look. Your browser remembers the choice.

What stays in the desktop app

EEforce 365 is for reviewing. Checking designs out and in, adding, renaming or deleting projects and designs, and downloading files all stay in the **desktop app**. Server administration — users, groups, licences and settings — is in the **web admin**.

Signing In

Open your server's address followed by /365 — for example <http://eeforce.kestrel.local/365> — and sign in with your EEforce username and password. If your company uses single sign-on, **Sign in with SSO** takes you to the same company sign-in page as the desktop app.



You need an EEforce account with at least the **Viewer** role on the project you want to look at — the same account as in the desktop app. If a project you expect is missing, see [Access & Roles](#).

Signing in to EEforce 365 uses no licence seat and doesn't end your session in the desktop app.

Signing out

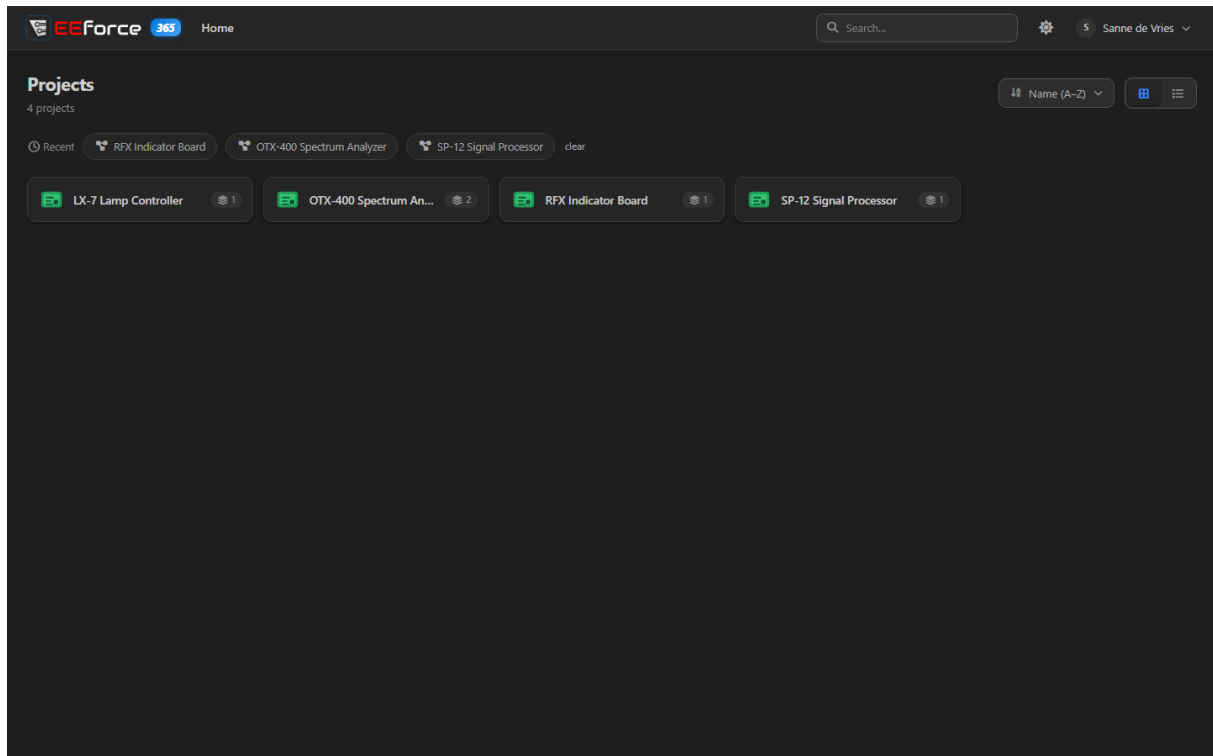
Click your name in the top-right corner and choose **Sign out**.

What's next

- [Finding a Design](#) — browse, sort and search
- [Reviewing in the Browser](#) — what EEforce 365 is for

Finding a Design

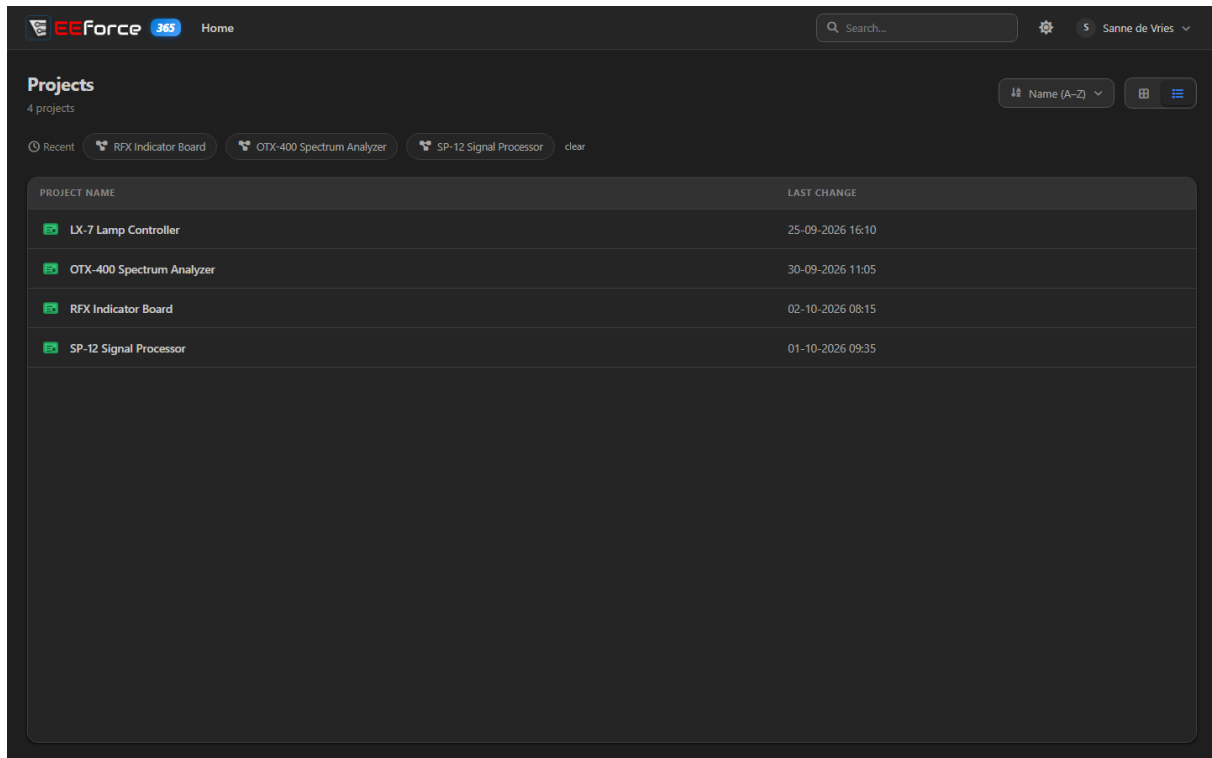
The home page lists the projects you have access to, with the number of boards in each.



Browsing your projects

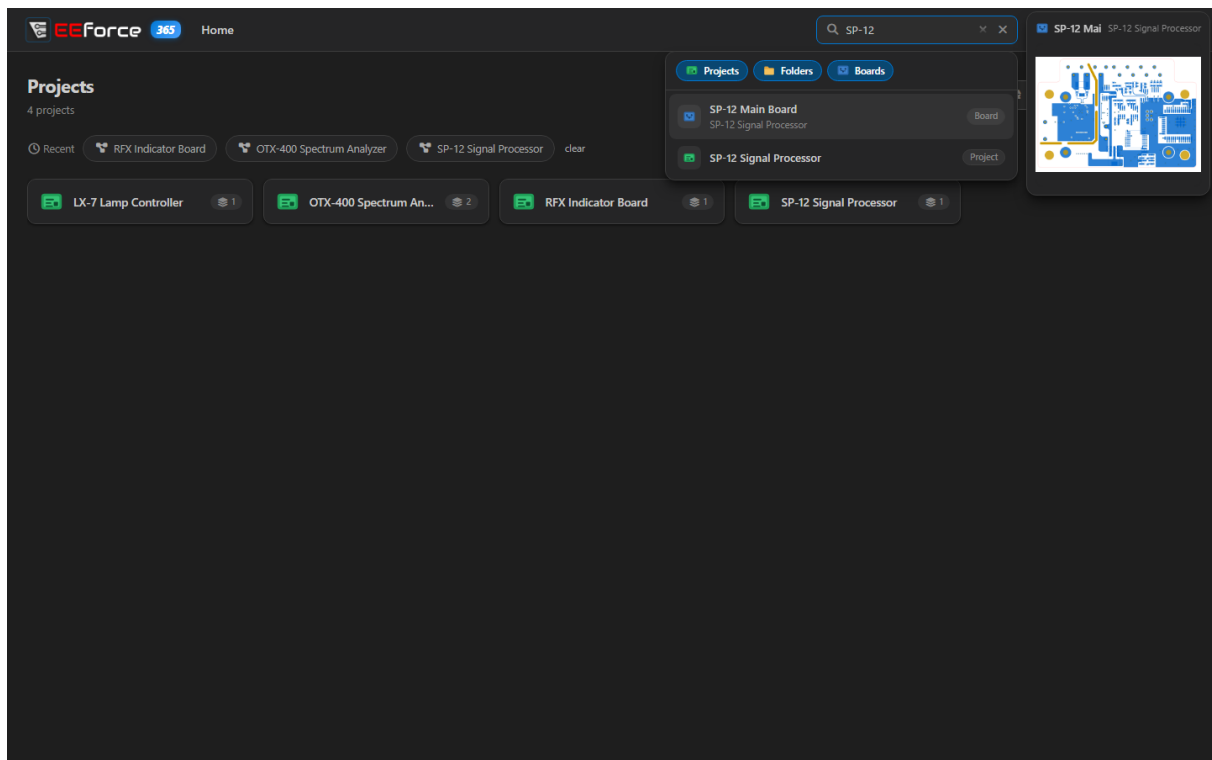
- **Grid or table.** The buttons in the top-right corner switch between project tiles and a table, which adds the date of each project's last change.
- **Sort** by name (**A-Z** or **Z-A**) or by date (**Newest first** or **Oldest first**).
- **Recent** shortcuts above the list take you straight back to the projects you opened last. **clear** empties the row.
- A long list is split into pages that fit your window; use the page controls under the list.

EEforce 365 remembers the view and the sort order for next time.



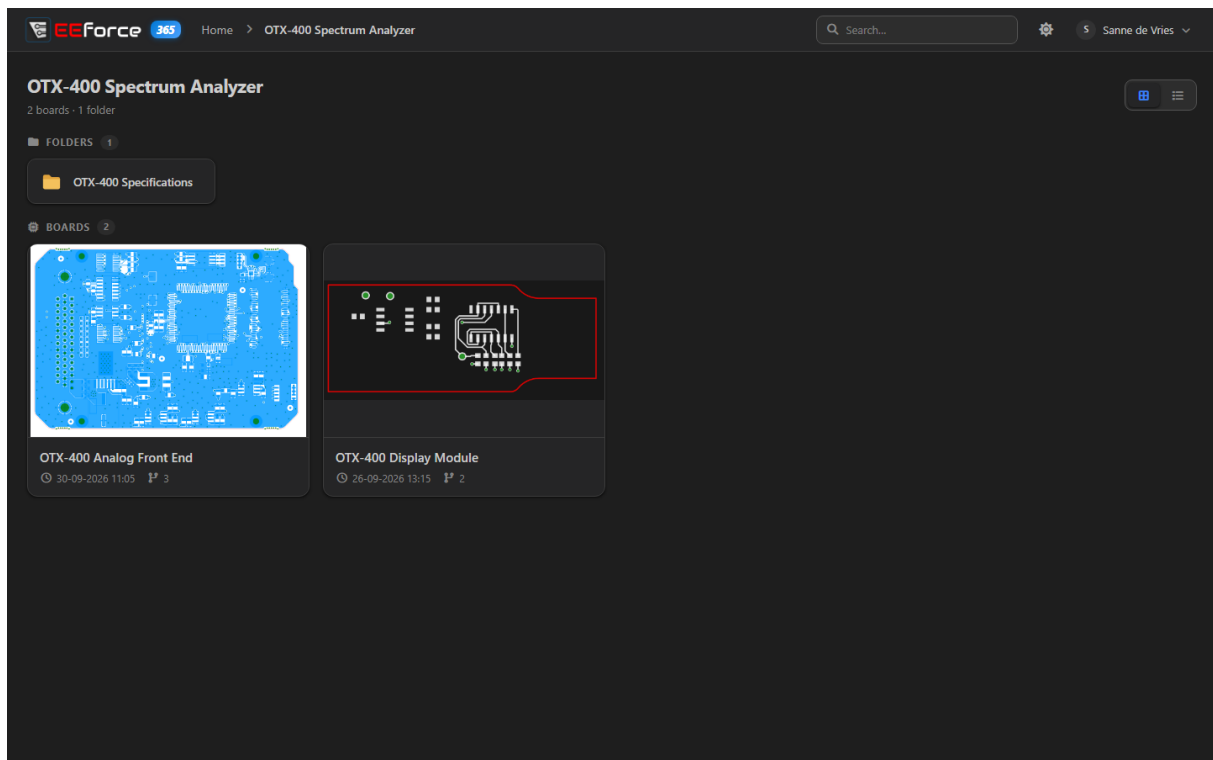
Searching

The **Search** box in the top bar covers everything you can see — projects, folders and boards. Start typing and the results appear underneath. The **Projects**, **Folders** and **Boards** chips switch each kind of result on or off. Point at a board to see a picture of it; press **Enter** to open the first result.

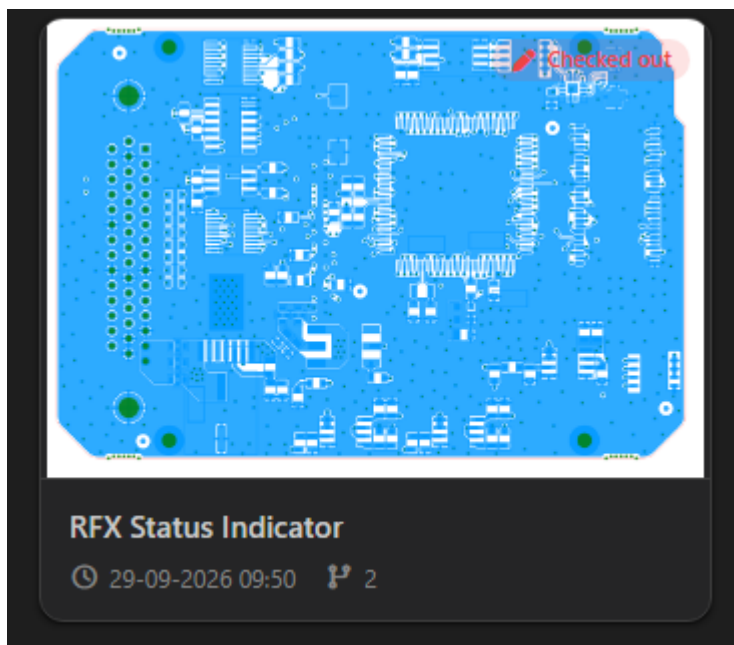


Inside a project

Open a project to see its **folders** and its **boards**. Each board card shows a picture of the board, when its latest version was checked in, and how many versions it has. The grid and table buttons work here too; the table lists each item's type, version count and last change.



If someone has a board checked out at the moment, its card says **Checked out** — they may be working on changes you can't see yet.



{data-zoomable width=368}

Click a board to open its latest version in the viewer; click a folder to see what's inside it. If you are a Manager of the project, the **Access** button at the top lets you choose who can see it — see [Managing](#)

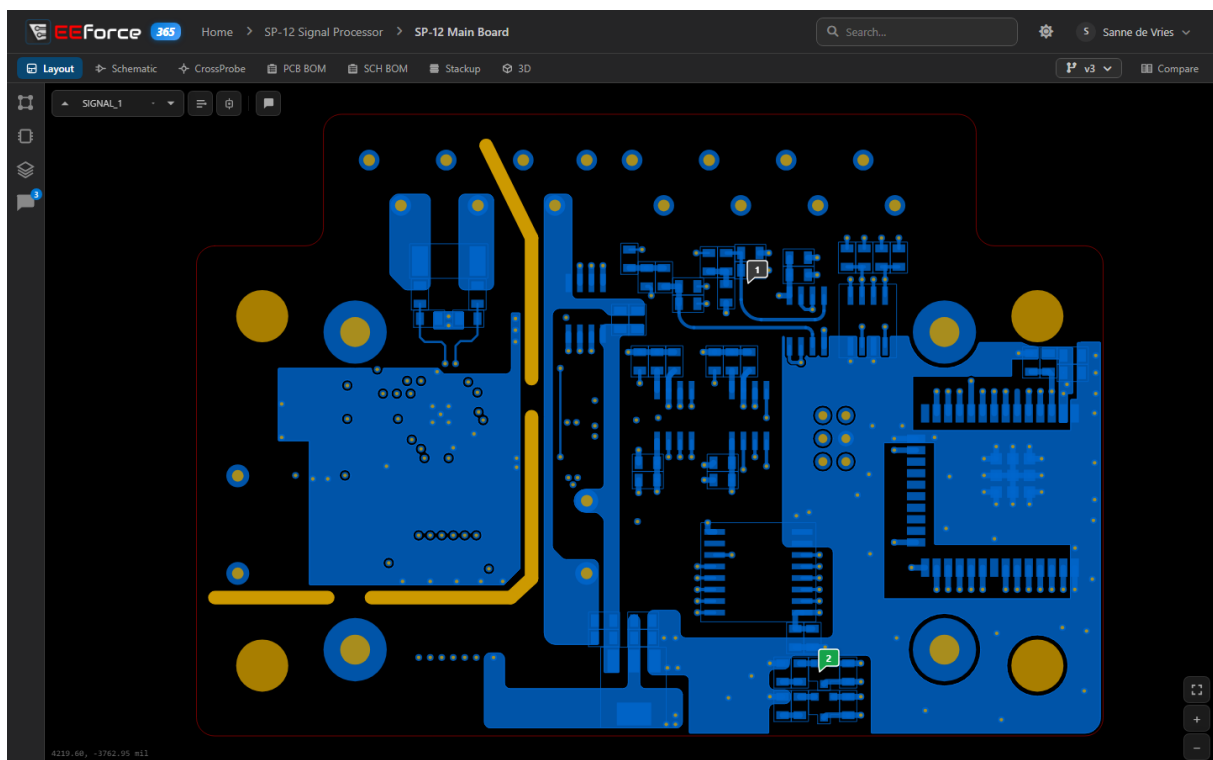
Access.

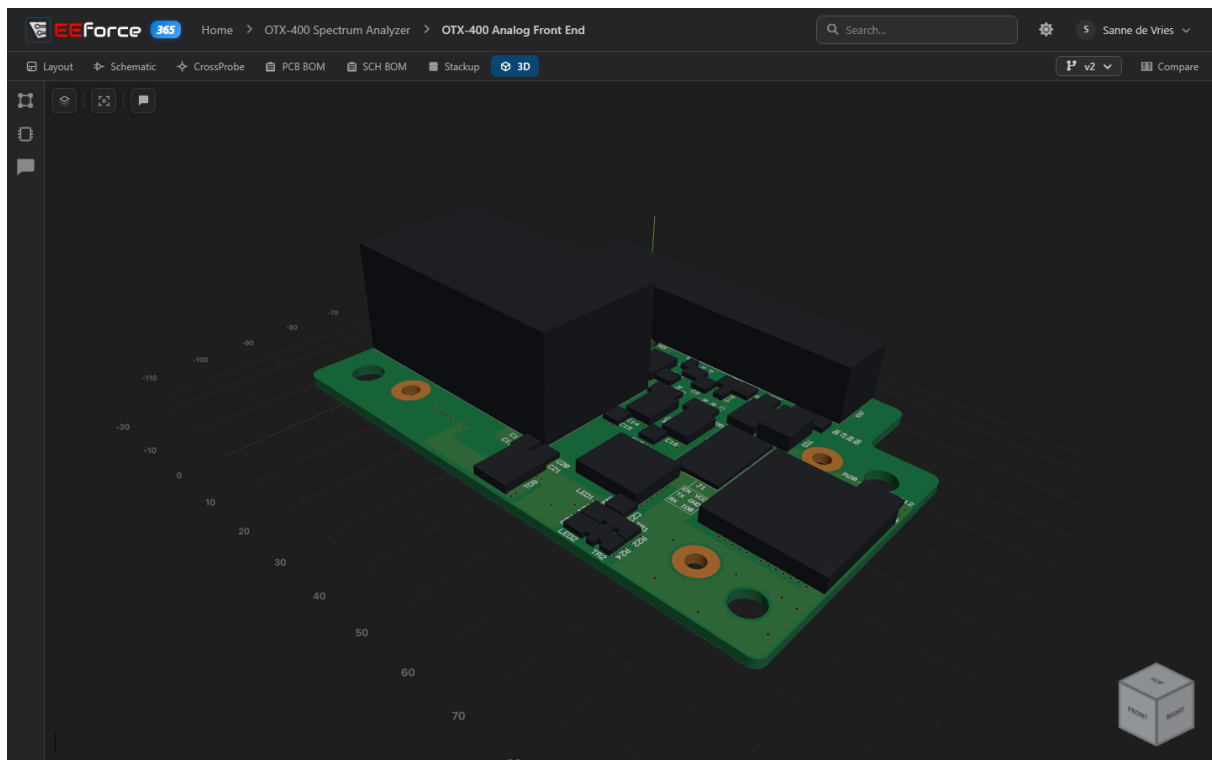
What's next

- [Viewing a Design](#) — open a board in the viewer
- [Comparing Designs](#) — see what changed between versions

Viewing a Design

Clicking a board opens it in the built-in viewer at its latest version — the same viewer as in the desktop app. The buttons along the top switch views: **Layout**, **Schematic**, **CrossProbe** (both at once), **PCB BOM**, **SCH BOM**, **PCB Spec** (the board's specification), **3D** and **Assembly** (the 3D board with the [Assembly Assistant](#) open). A button is greyed out when the version doesn't contain that data; point at it to see why. Zoom and fit controls sit in the bottom-right corner.





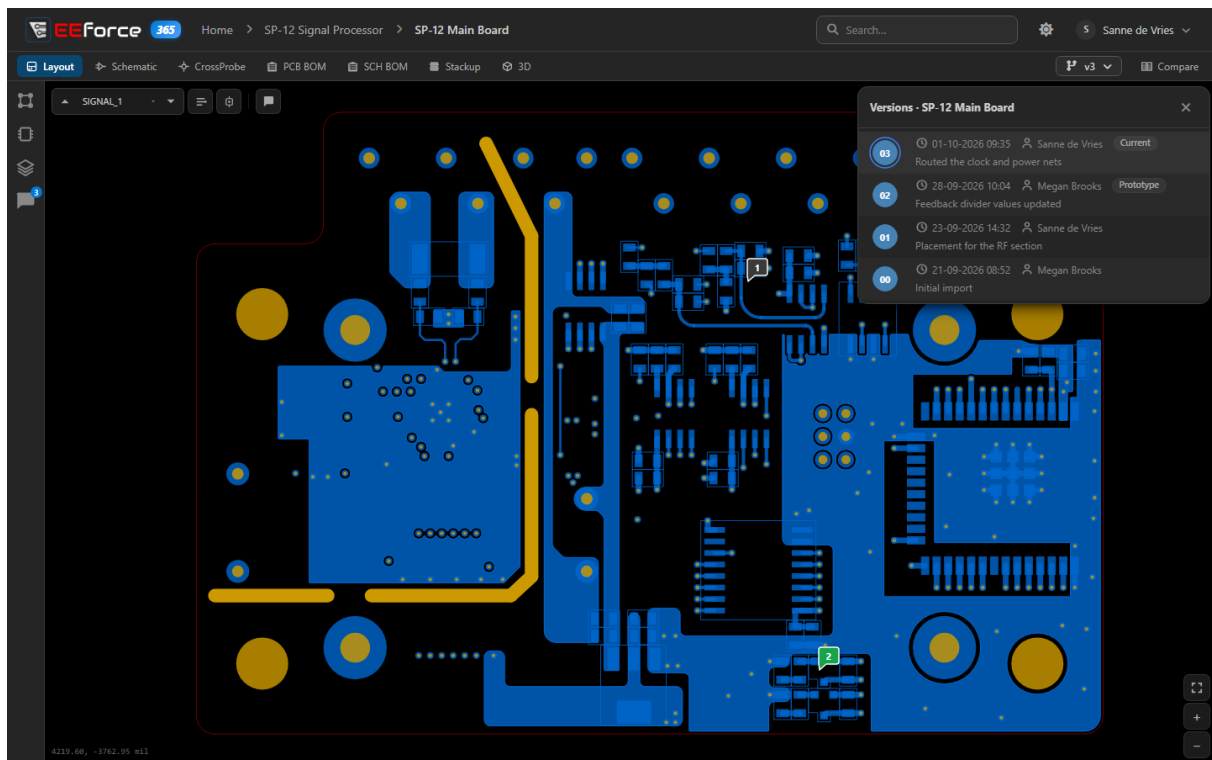
How each view works — layers, selecting and measuring, assembly variants, BOM filters and export, the PCB specification, the 3D controls and the Assembly Assistant — is described in [Previewing Designs](#). On the **CrossProbe** page, either view can open in a browser tab of its own and stays cross-probed with the page — handy on a second screen.

The side panel

The icons on the left of the viewer open the same panels as in the desktop app: layers, components, nets and the comment list. Everything you see comes straight from the server, so nothing is checked out and nothing can be changed by accident.

Switching versions

Click the version button in the top bar (for example **v3**) to open the version list. Each version shows when it was checked in, by whom, its check-in comment and its tag. The newest is marked **Current**, and the lines on the left show which version each one was based on, so branches are easy to follow. Click a version to open it.



A version marked **Pruned** or **Preview is not available** can't be opened in the viewer.

When the design changes while you look

The version list follows the board while you have it open: a version checked in by a colleague appears by itself. The viewer also shows a notice:

- **Version 4 is available** — a newer version was checked in while you were looking. Click **Go to latest** to open it.
- **Checked out by a colleague** — someone is editing the design, so you may not be seeing its latest state yet.

See [When the design changes while you look](#) for pictures of both.

What's next

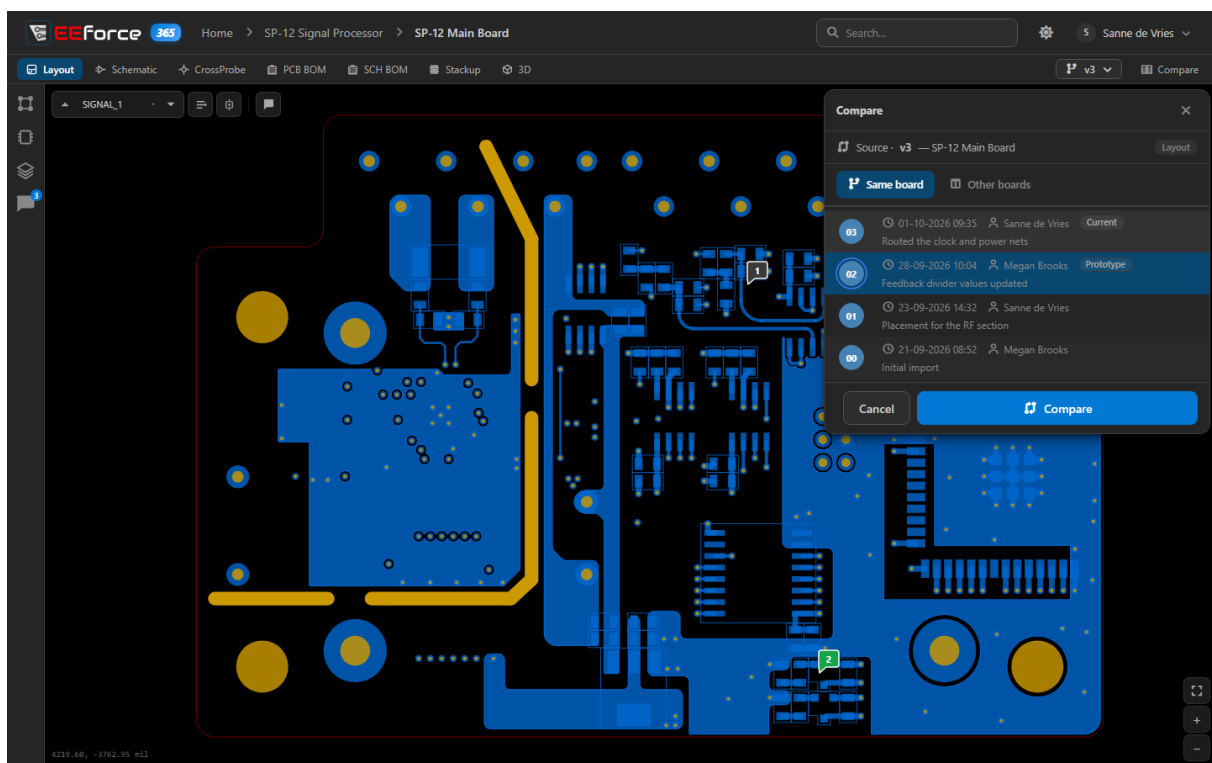
- [Comparing Designs](#) — put two versions side by side
- [Comments](#) — read and reply on the board

Comparing Designs

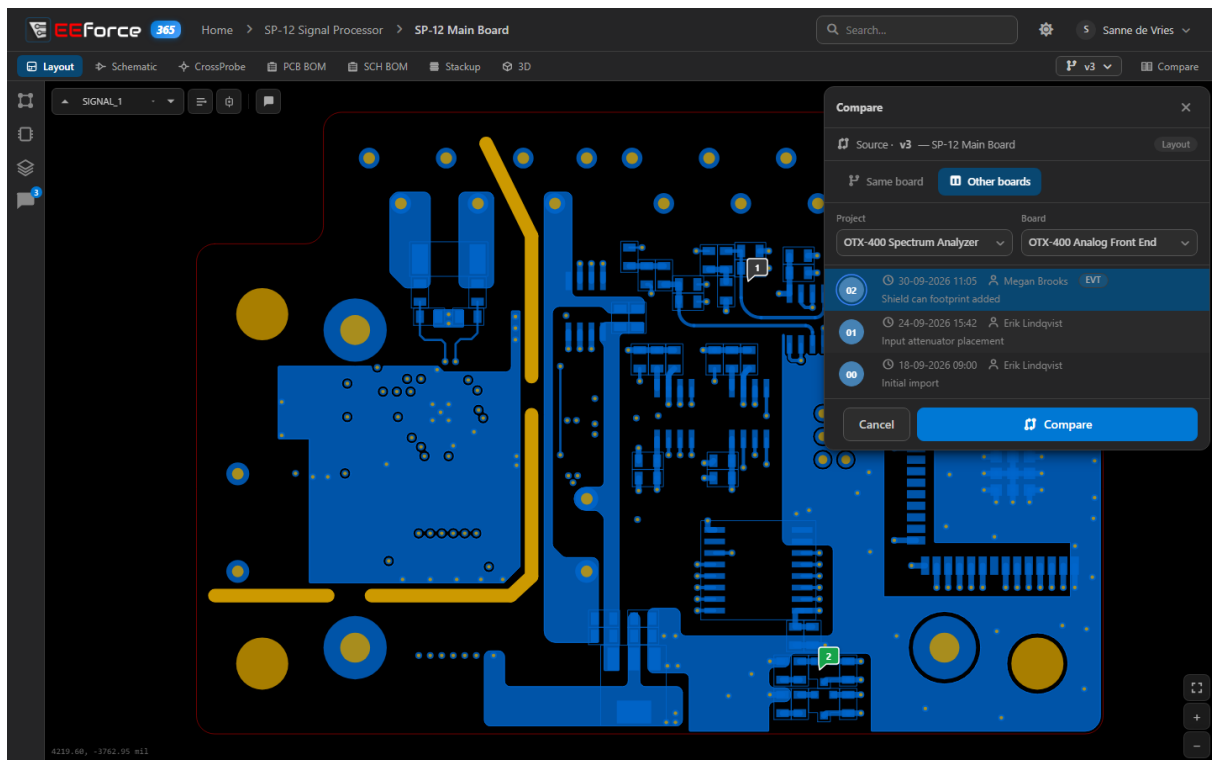
Compare puts two versions on top of each other so you can see exactly what changed. You can compare a board with one of its own earlier versions, or with a board from any project you have access to.

Choosing what to compare

Click **Compare** at the right end of the toolbar, next to the version button. The popup shows the version you're looking at as the **Source**, and the view the comparison uses: **Layout**, or **Schematic** for a design without a layout.



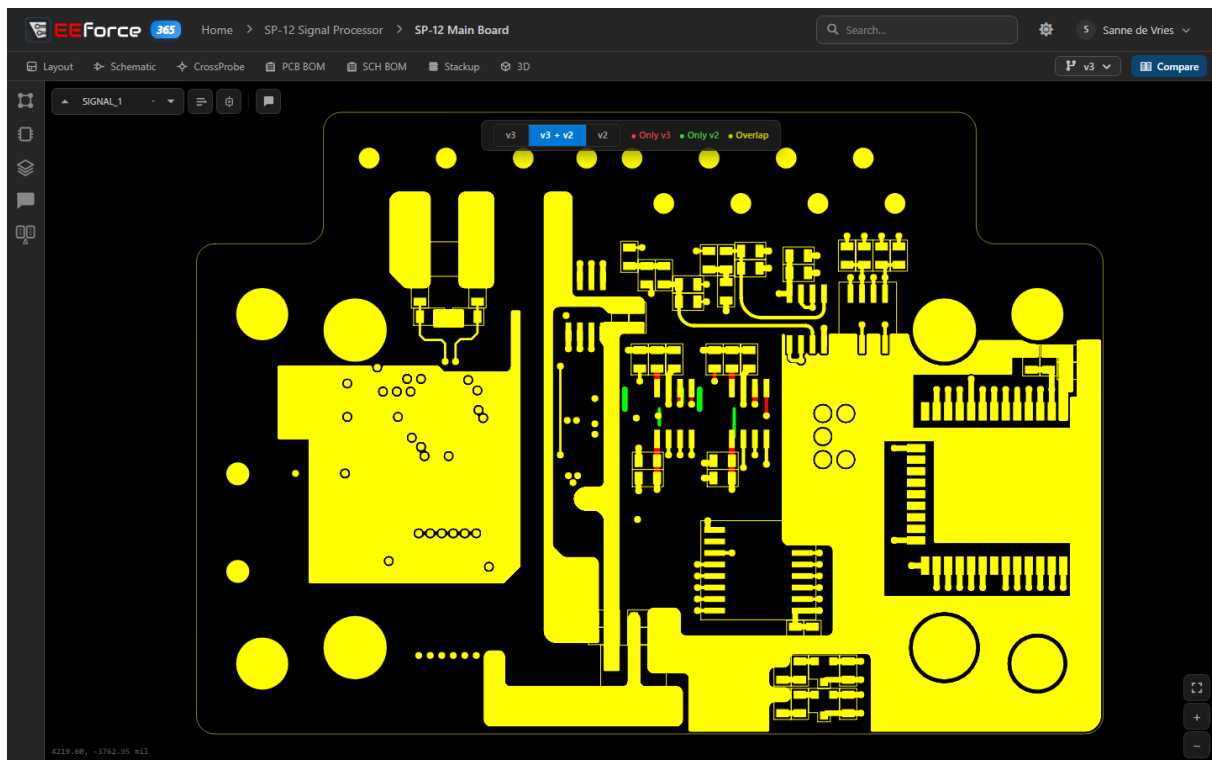
- **Same board** — pick one of the board's other versions from the list.
- **Other boards** — pick a **Project** and a **Board** (both lists can be searched as you type), then one of that board's versions. Boards without a preview are marked **(no preview)**.



Click **Compare** to open the comparison.

Reading the comparison

The viewer shows both versions in one picture. The legend in the top-right corner names the two sides, **A** (the source) and **B**, with their colours: what only one side has, what only the other has, and yellow where both draw the same. Untick a side to see the other alone, or press **O** to switch between **A**, **A + B** and **B**.



The **Differences** panel, opened from the icons on the left, lists every change. Click one to zoom straight to it. In a layout comparison, the **Compare Assistant** on the left lines the two up — see [Lining up two boards](#).

If you switch to another version from the version button while comparing, the comparison stays: the new version is compared with the same target. Like every page in EEforce 365, a comparison has its own address you can share.

What's next

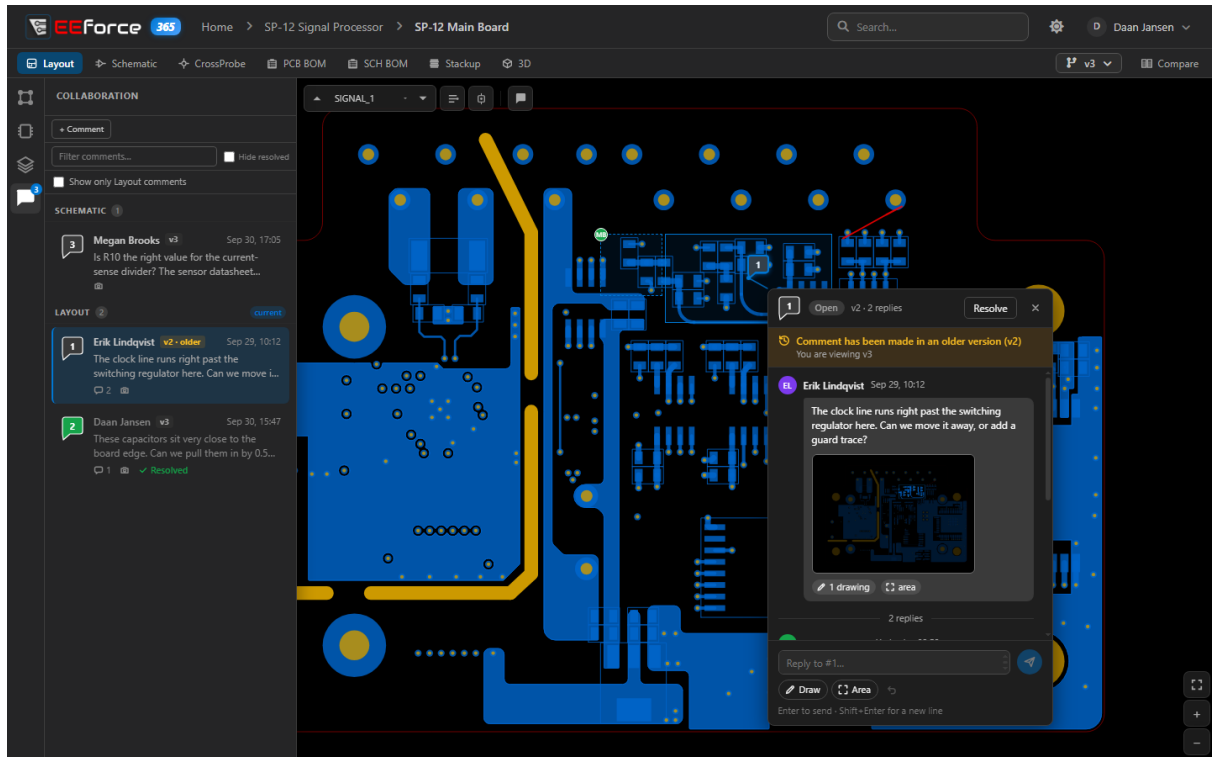
- [Viewing a Design](#) — the viewer and its views
- [Comments](#) — discuss what you find

Comments

Comments in EEforce 365 are the same conversations as in the desktop app and in the design tools: whatever is posted in one place appears everywhere, live.

Click the speech-bubble icon on the left of the viewer to open the **Collaboration** panel. It lists every comment on the design, grouped by view (**Schematic**, **Layout**, **3D** and **BOM**), with who wrote it, when,

the version it was made on and its number of replies. Click a comment to jump to its spot and open the conversation.



Leaving a comment, calling out an area, sketching, replying and resolving all work exactly as in the app — see [Reviewing Designs Together](#).

You can...	With the role
Read, add comments and reply	Viewer or higher
Resolve and reopen comments	Contributor or Manager

What's next

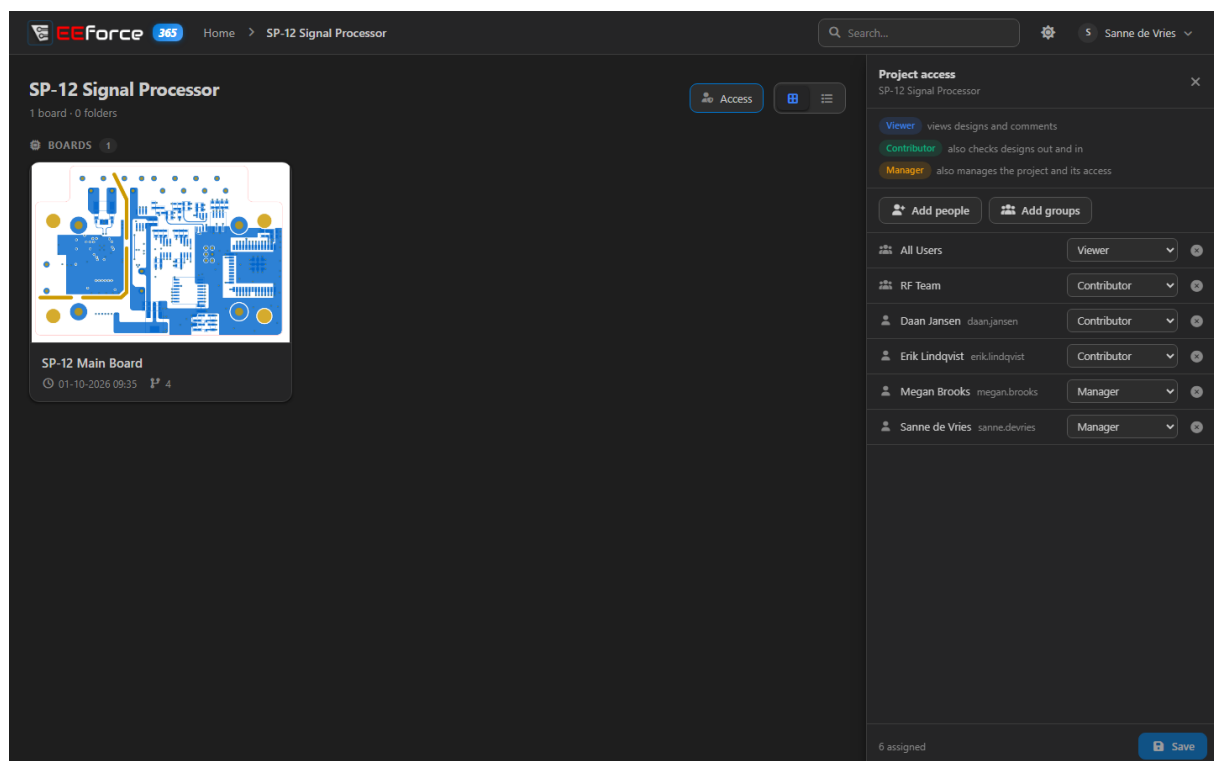
- [Viewing a Design](#) — the views you can comment on
- [Comparing Designs](#) — check what changed before you reply

Managing Access

A project's **Managers** can choose who sees the project and what they may do in it, straight from EEforce 365 — no desktop app and no licence seat needed. It is the same access list you can edit in the desktop app's project **Properties** and in the **web admin**, so a change made in one place shows everywhere.

Opening the access list

Open the project and click **Access** at the top of the page. The **Project access** panel opens beside the project's boards, so you can keep an eye on the project while you edit.



The button appears only for the project's Managers and for EEforce's super users — the built-in administrator and members of **Project Administrators**.

Each row is a person or a group with a role. The legend at the top sums the roles up:

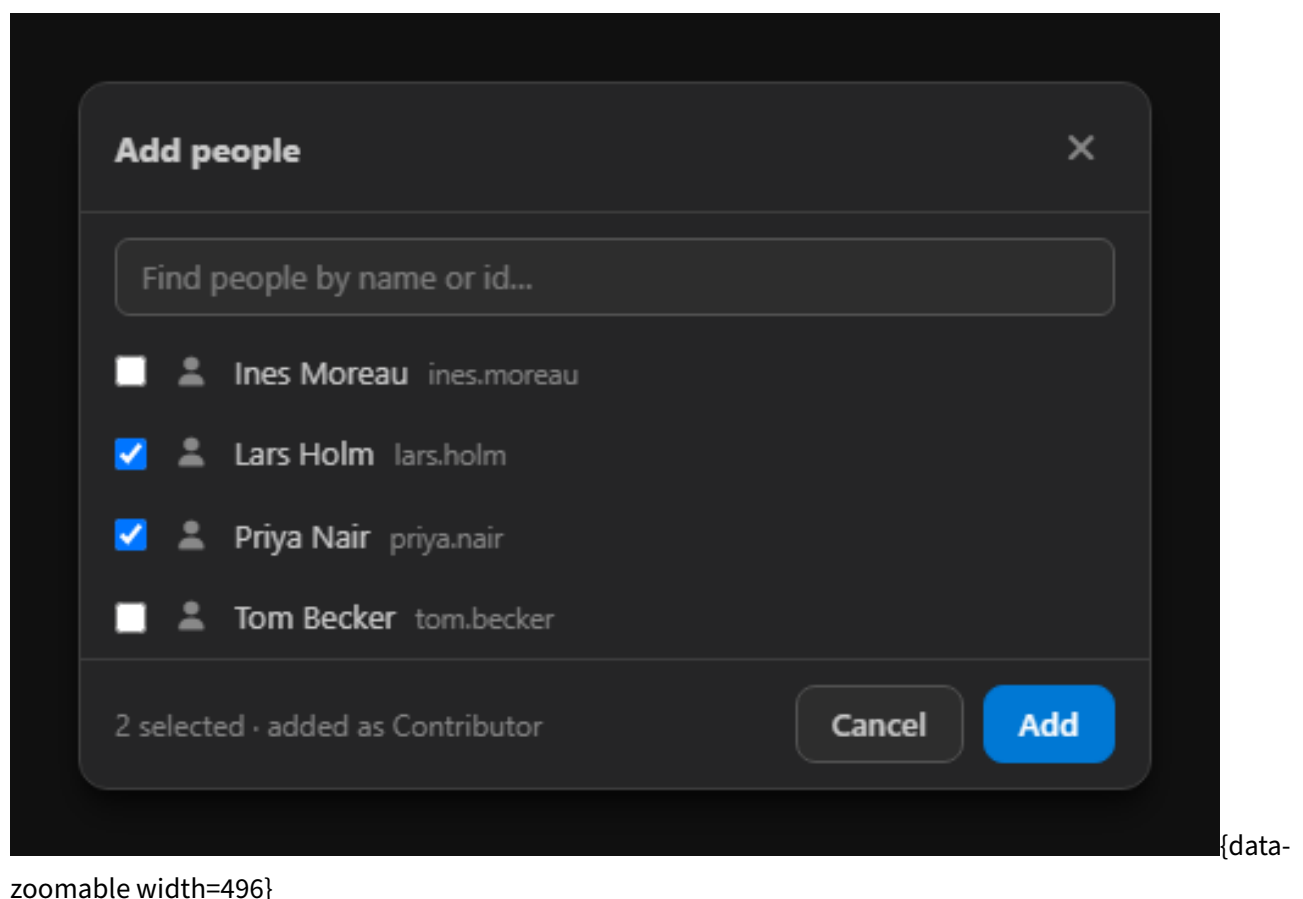
Role	Can
Viewer	view designs and comment

Role	Can
Contributor	also check designs out and in (in the desktop app) and resolve comments
Manager	also manage the project and its access

Someone in several groups gets the highest role any of them grants. More about roles: [Access & Roles](#).

Adding people or groups

1. Click **Add people** or **Add groups**.
2. Find them by name or id, and tick everyone you want to add.
3. Click **Add**. New entries start as **Contributor** — change the role in the list if needed.



The lists only offer people and groups that aren't on the project yet. The built-in administrator and the **Project Administrators** and **Project Creators** groups are never added to a project: they have their

rights everywhere already.

Changing and removing

- Pick a different role in a row's list to change it.
- Click × at the end of a row to remove that person or group.

Nothing changes until you save. The bottom of the panel counts the entries and says when there are **unsaved changes**; **Discard** puts the list back as it was, and **Save** applies it. The panel can't be closed while there are unsaved changes. Otherwise × or **Esc** closes it. The new access takes effect at once — in EEforce 365, the desktop app and the web admin.

Project access

SP-12 Signal Processor

Viewer views designs and comments

Contributor also checks designs out and in

Manager also manages the project and its access

Add people **Add groups**

All Users	Viewer	
RF Team	Contributor	
Daan Jansen daan.jansen	Contributor	
Erik Lindqvist erik.lindqvist	Contributor	
Lars Holm lars.holm	Contributor	
Megan Brooks megan.brooks	Manager	
Priya Nair priya.nair	Contributor	
Sanne de Vries sanne.devries	Manager	

8 assigned · unsaved changes

Discard **Save**

{data-zoomable width=432}

Safety checks

- **Your own access.** If the list you're saving would make you less than a Manager, EEforce warns you first, because you couldn't change the access afterwards. Click **Save anyway** to go ahead.
- **An empty list.** With no one assigned, only super users can open the project.
- **Someone else changed it.** If another Manager changes the access while you have the panel open, your list updates by itself. If you have unsaved edits, a banner says *Someone changed this project's access while you were editing* — click **Show the latest** to see their version. Saving a list that was edited from an older version is refused with an explanation, so nobody's change is silently overwritten.
- **Read-only mode.** While the server licence has expired, access can't be changed.

If your own access to the project is removed while you have it open, EEforce 365 says *You no longer have access to this project*, with a button back to your projects.

What's next

- [Access & Roles](#) — how roles work across EEforce
- [Finding a Design](#) — the project pages

Frequently Asked Questions

Designs and files

Which design tools does EEforce work with?

Siemens Xpedition (all VX-series versions and the newer year-based releases such as 2409, 2504, 2604) and **PADS Professional** (all versions). These get the full experience: one-click open, previews, and bills of materials.

What is the small EEforce toolbar on my Xpedition or PADS Professional window?

That's the **EEforce Companion**. EEforce puts it on every editor it opens, so you can save a version with **Save & Check In** and read and add comments without leaving the tool. See [Working in Xpedition & PADS Professional](#).

Can I store other things — PDFs, specs, mechanical files, older PADS designs?

Yes. Put anything into a **Generic Container** (called a *Folder* in earlier versions). It's kept and versioned just like a board, but shown as a list of files rather than with a picture preview. See [Designs & Versions](#).

Do I need Xpedition or PADS Professional installed just to look at designs?

No. Previewing designs, comparing versions, commenting, browsing files and downloading them all work without any design tool installed. You only need Xpedition or PADS Professional when you want to **edit** a design.

Can a colleague without EEforce look at a design?

Yes, with **EEforce 365** in a web browser. They need an EEforce account and at least the **Viewer** role on the project, but no installation and no licence seat. See [Reviewing in the Browser](#).

Can I give a colleague access to a project without the desktop app?

Yes, if you are a Manager of the project. Open the project in **EEforce 365**, click **Access**, and add the person or their group with the role they need. See [Managing Access](#).

How do I see what changed between two versions?

Use **Compare**. It shows both versions on top of each other and marks what exists only in one of them. You can also compare with another board. See [Comparing Designs](#).

Your data

Where are my designs kept?

On your company's EEforce server, in an encrypted store — on the server's own disks or in cloud storage, as your IT team chose. Every version you've ever checked in is kept there. You reach it all through the EEforce app or EEforce 365 — see [Browsing & Downloading Files](#).

Can I always get my files back?

Yes. Any file, from any version, can be opened or downloaded at any time. Nothing is deleted when a new version is saved; an old version only goes away if a project Manager or an administrator deliberately prunes it — and even then its files wait in the server's trash, where an administrator can restore them.

What if a design is deleted by mistake?

Deleted projects and designs are moved to the server's trash rather than erased. An administrator can restore them from the web administration — back where they were, or under a new name when that place has been taken since. See [Storage Assistant](#).

Are my designs backed up?

Backups are set up and looked after by whoever manages your EEforce server. If you have concerns about backups, ask your administrator.

What happens to our designs if the licence expires?

Nothing is lost or locked away. If the server licence expires, EEforce switches to **read-only mode**: you can still sign in, browse, preview and download everything, but you can't check designs out or in until the licence is renewed. See [Signing In](#).

Access and connection

Can I use EEforce from home or on the road?

Usually yes — connect to your company network the same way you'd reach shared drives (often a VPN), and EEforce works normally. Your IT team will tell you what's needed. To work on a design with no connection at all, see [Working Remotely](#).

Can several people work in the same project at once?

Yes. Different people can edit *different designs* in the same project at the same time. A *single design* can only be edited by one person at a time — everyone else can still view it.

Why can I look at a project but not change anything in it?

Your role in that project is **Viewer**, so EEforce shows a **Read-Only Project** banner. Viewers can look, download and comment. Ask the project's manager if you need to check designs out. See [Access & Roles](#).

Why was I asked to “switch to this machine”?

EEforce allows one active desktop session per person. You're still signed in on another computer, and switching signs that one out. If you have designs checked out there, check them in on that computer first — switching from here would throw away their changes. See [Signing In](#).

Signing in and licences

The licence step says “None available”

All of your company's seats for that licence are in use. Wait for a colleague to close EEforce, or ask your administrator about adding more seats. If you only need to look at a design, EEforce 365 needs no seat.

I don't see “Sign in with SSO”

The button appears only when single sign-on is switched on for your server. Sign in with your username and password, or ask your administrator.

EEforce says “A newer client version is required”

Your server has been updated, and your administrator has switched automatic updates off. Ask your IT team to install the new version — see [Updating EEforce](#).

I'm on a new computer — what do I need?

Install the app (see [Installing EEforce](#)) and sign in as usual. If you're still signed in on your old computer, EEforce offers to switch to the new one.

Something's not working

“Cannot connect to server”

1. Check your own internet or network connection.
2. If you work remotely, make sure your VPN is connected.
3. Confirm the **Server URL** in **Tools** → **Settings** (or **Server Settings** on the sign-in screen) matches what your administrator gave you.
4. Wait a minute — EEforce keeps retrying. If it stays disconnected, contact your administrator. See [Staying Connected](#).

A check-in is slow or fails on a big design

Turn on **Chunked upload** in **Tools** → **Settings** (it's off by default). EEforce then uploads large designs in smaller pieces, which copes better with slow or unreliable connections.

A design is checked out, but no one seems to be editing it

The design list shows who has it checked out. Ask that person to check it in, or to cancel the check-out if they don't need their changes. If they can't — for example they have left the company — your EEforce administrator can cancel the check-out for them. Any changes they hadn't checked in are then lost.