

OrCAD Engineering Data Management Client Installation Guide

**Product Version 17.4-2019
October 2019**

Updated: July 2023

Table of Contents

1	Client Installation and Setup	1
1.1	Required Information	1
1.2	Installing EDM Client (Key)	1
1.3	Updating EDM URL	4
1.4	Verify EDM Installation	6
2	Troubleshooting Client Installation Problems	7
2.1	Trouble with EDM Menu Item in Capture	7
2.2	Trouble with EDM Menu Item in PCB Editor	9
2.3	EDM Fails to Connect to PCB Editor	10
2.4	Incompatible Version Error After Log In	10
2.5	License Error After Log In	11
2.6	EDM Shows Blank Screen	12

1 Client Installation and Setup

This Client Installation Guide provides the following instructions:

1. [Installation of EDM client files](#)
2. Set up [EDM URL](#) within EDM client installer or manually from EDM Setup
3. Verify EDM client installation

Note: When using OrCAD EDM Web application version 6.1.0 or higher, the EDM Client version must match the EDM Web Application.

1.1 Required Information

To proceed with your client installation, you need the EDM Client installer as well as the following information:

- URL of your EDM Web application
- Location of your "HOME" directory. Capture loads TCL files from "HOME" Although CDS_SITE may be use, having EDM load from CDS_SITE greatly increase Capture start up time.

Prerequisites

To fully obtain the full functionality of EDM, the following application required:

- Cadence OrCAD Capture CIS 17.4
- Cadence PCB Editor 17.4
- Windows 8.1 Pro, Windows 10 Pro (versions supported by Microsoft)
- Ghostscript PS interpreter or Acro Distiller

1.2 Installing EDM Client (Key)

This section contains instructions for installing EDM Client only. The functionality of the EDM client will only work with the corresponding versions of EDM Server. Consult with your IT or project leader to determine whether the database and web application are set up.

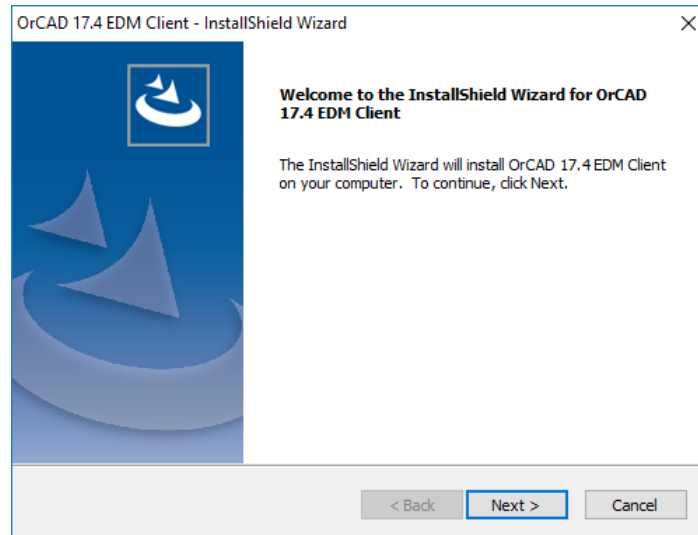
OrCAD Capture must be installed and must be closed before you begin.

To install a new EDM Client

1. Launch the EDM Client installation wizard by double clicking the EDM Client installation program:

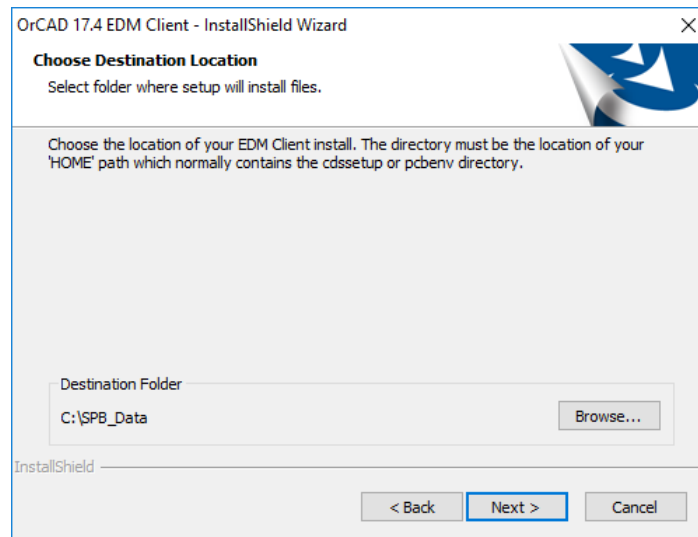
OrCAD17.4EDMClientSetup.exe

The installation of EDM Client must be completed on each client machine set up. The product Install Wizard opens to the **Welcome** dialog box. Click **Next**.



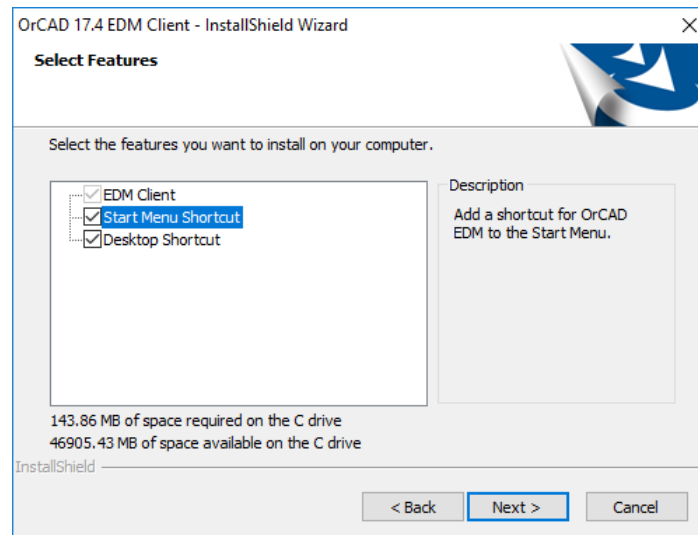
2. Click on **Next** to bring up the **License Agreement** dialog. You will need to read and agree to the End User License Agreement (EULA) before proceeding. After reading the EULA, click on the "**I accept...**" button and click **Next** to continue. If you do not have OrCAD Capture installed, the installation will terminate.
3. On the **Choose Destination Location** dialog box, you may change the location to the EDM installation. The default installation directory is based on to your "HOME" environment location. If you wish to change the installation location, click **Browse...** and navigate to the folder in which you wish to install EDM.

Note: The location must be a valid location where Capture loads TCL files, or PCB editor looks for the **Allegro.ilinit** file. Select the directory and click **Next** to continue. If you do not have a "HOME" environment variable defined, you will need to add it in order for EDM to load correctly into Capture.



EDM Client Install Location Screen

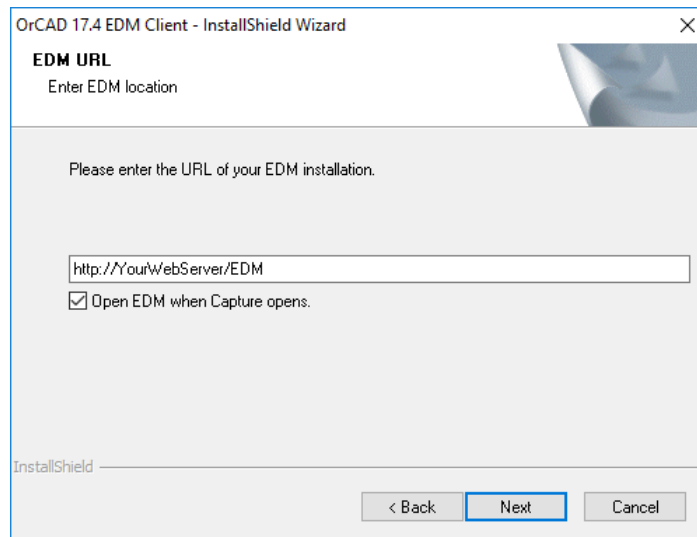
4. The **Select Features** window will display. Options for **Start Menu Shortcut** and **Desktop Shortcut** are available. They are checked by default. Uncheck either if you do not want shortcuts added during installation. Then click **Next** to continue.



Select Feature Screen

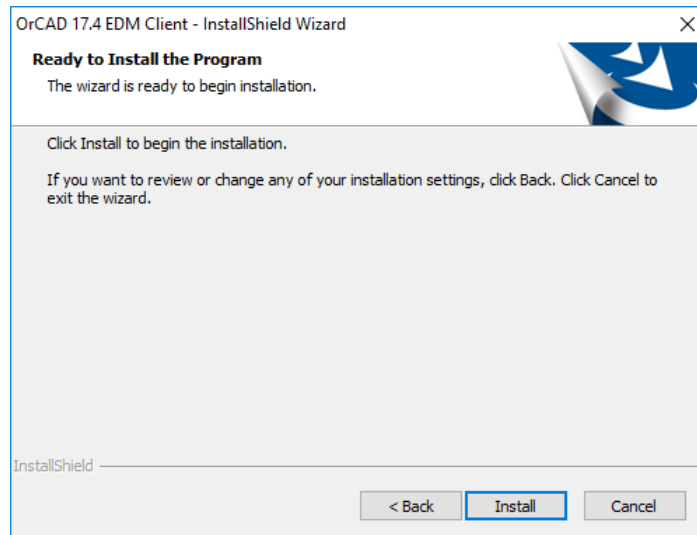
5. On the **EDM URL** dialog, you may enter the URL of your EDM web server. If you do not know the URL, you may **Skip** this step and enter the URL manually later. If you have the URL, enter the URL and click **Next**.

Note: The URL is required to open EDM. To enter or change the URL after installation, select **EDM > Settings** from the Capture menu item.



Enter EDM Web Application URL

6. In the **Ready to Install the Program** dialog box, click **Install** to start the installation.



Ready to Install Client Screen

7. When the EDM Client installation is complete, click **Finish**.

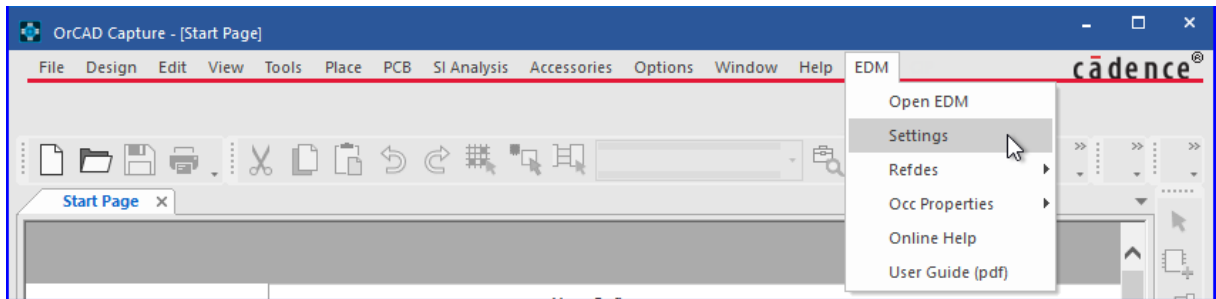
Follow the Getting Started section in the EDM user guide to start using EDM.

1.3 Updating EDM URL

To change the EDM URL when opened in Capture

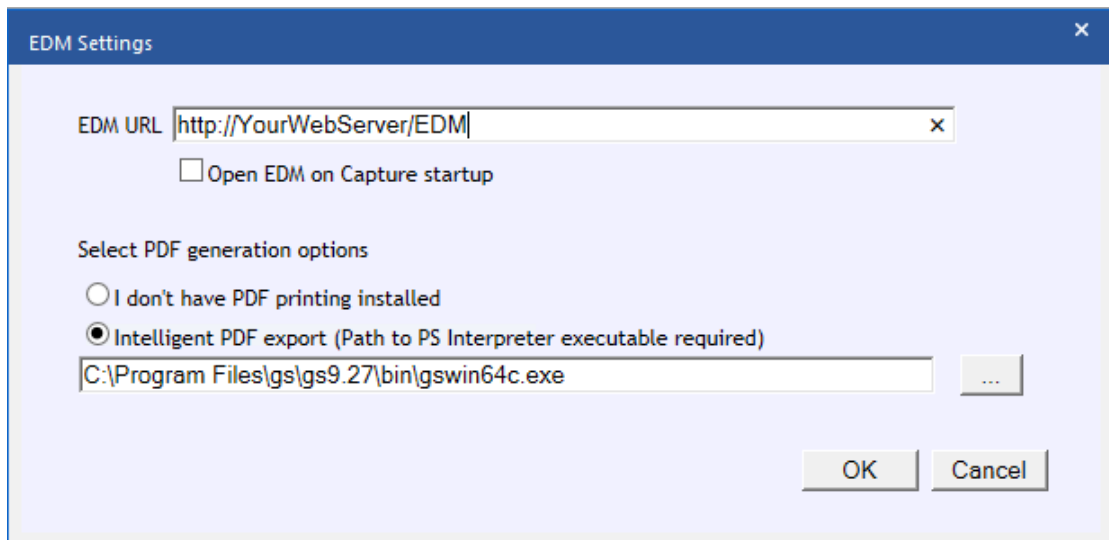
1. Open OrCAD Capture
2. Select **EDM** from the top menu bar and then click **Settings...**

If **EDM** is unavailable from the top menu bar, see the [Troubleshooting Installation](#) section.



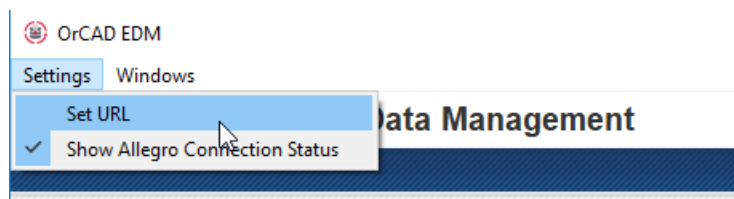
The EDM Settings pop-up opens as shown in the following figure.

3. Enter the web address of your company's EDM. If you want EDM to automatically open when you open Capture, select the check box, **Open EDM on Capture startup**.

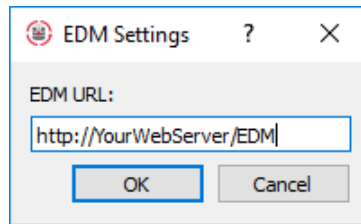


To change the EDM URL when opened in EDM Desktop

1. Open EDM Desktop application
2. Select **Setting** from the top menu bar and then click **Set URL**.

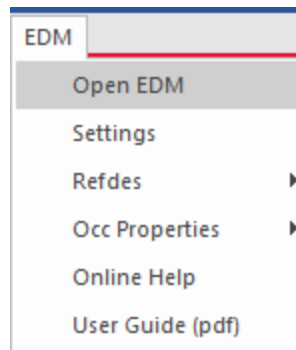


3. Enter the web address of your company's EDM and click **OK** to save and open EDM.

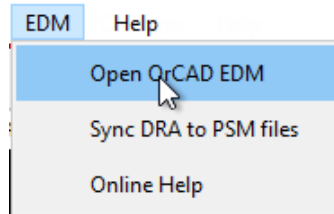


1.4 Verify EDM Installation

Open Capture and look for EDM menu item. Review steps in [troubleshooting EDM menu problems in Capture](#) if you do not see this menu.



Open PCB Editor and look for EDM menu item. Review steps in [troubleshooting EDM menu problems in PCB Editor](#) if you do not see this menu.



2 Troubleshooting Client Installation Problems

The troubleshooting instructions that follow help you debug typical installation problems that are associated with the EDM Client installer. Please contact your Cadence channel partner if you have any questions or continue to have an installation issue.

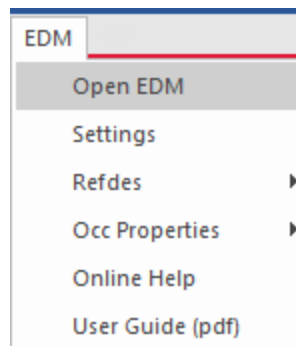
The troubleshoot section provides information on resolving the following issues:

- [Menu item is not available or correct in Capture](#)
- [Menu item is not available or correct in PCB](#)
- [EDM fails to connect to PCB Editor](#)
- [Incompatible version message after log in](#)
- [License error after log in](#)

2.1 Trouble with EDM Menu Item in Capture

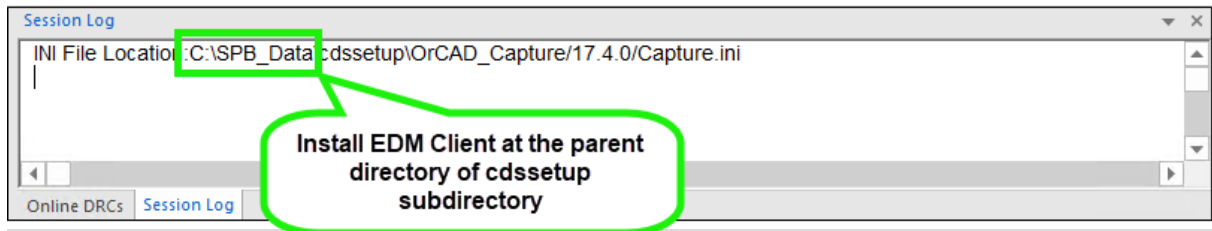
Menu Item is Not Available or Not Correct in Capture

After you open Capture, the menu option to **Open EDM** is missing from the menu bar:



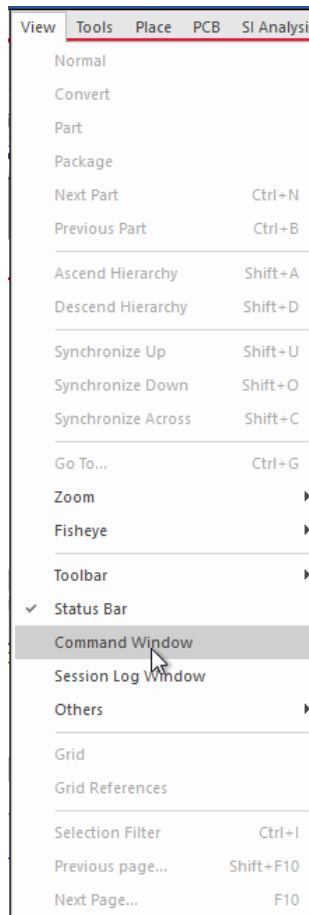
Check to make sure that you are running OrCAD Capture 17.4. and that you installed to the corresponding "HOME" directory.

To determine the proper installation directory, open Session log after Capture opens. Review the path of the Capture.ini loaded by Capture. See example in the following figure.



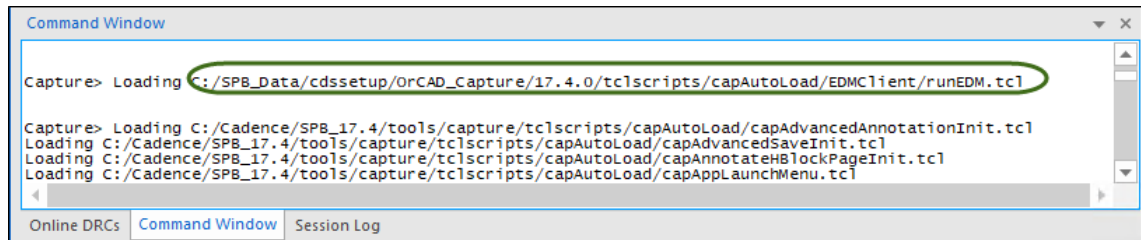
If you see EDM but the rest of the menus options are incorrect, make sure that you did not move any of the files after installation. If you did, remove all files and re-install. (Moving files can cause Capture to do partial loading of EDM Client files. Making copies of the files and putting them in various Cadence directories may also cause problems as you upgrade, since Capture will load TCL files from various locations.)

If you are unsure whether the EDM files loaded without errors, open your command window. While in Capture, select **View -> Command Window** (see figure below).



Locate where runEDM.tcl is loading. The command window should look similar to what is shown in the following figure. If you don't see the following lines in your command window, then EDM client most likely did not install in a location where Capture loads TCL files from. If there are errors shown for loading this file in the command window, you will need to follow the error message to see the source of the problem.

You can try removing the installation and all files and install the files again, or contact your Cadence channel partner.



Possible causes:

1. You may have either a **TCL_Library** or **TK_LIBRARY** environment variable defined.
2. You may have another TCL application installed that redefines the TCL library environment.

Solution:

1. You will need to remove these environment variables. Further explanation can be found from the following link: https://wiki.tcl-lang.org/page/TCL_LIBRARY.
2. If you do have either environment variable defined, try removing each of the other TCL applications to see which of the applications is causing the problem.

2.2 Trouble with EDM Menu Item in PCB Editor

If the **Open OrCAD EDM** menu option fails to display when you launch your PCB Editor, you may need to edit your Allegro.ilinit file.

During the installation of the EDM Client Plug in, the installer updates your Allegro.ilinit file by inserting the following lines the file. Un-installation and re-installation of the EDM Client Plug In multiple times may lead to addition of these lines in unexpected ways. You may manually fix the file or remove all lines added by the EDM installation and run the installer after removing unwanted lines.

To edit the Allegro .ilinit file:

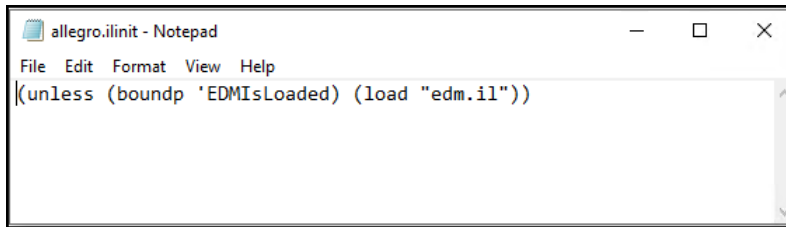
1. Open a Windows Explorer window.
2. Navigate to your %home% directory, and open the pcbenv folder.
3. Open Allegro.ilinit and check for any axlSetVariable lines that refer to older versions of EDM. This will be the case if an older version of the EDM client has been installed at some point. Installation of multiple versions of EDM Client may also lead to incorrectly formed Allegro.ilinit. The following is a sample of an older Allegro.ilinit file.

```

1 (axlSetVariable "EMA_EDMInstall" "C:/spb_data/cdssetup/OrCAD_Capture/17.2.0/tclscripts/capAutoLoad/EDMClient/EDM")
2 ;(axlSetVariable "EMA_EDMInstall" "C:/spb_data/cdssetup/OrCAD_Capture/16.6.0/tclscripts/capAutoLoad/EDMClient/EDM")
3 (axlSetVariable "EMA_EDMRoot" (strcat (axlGetVariable "EMA_EDMInstall") "/Desktop"))
4 (load (strcat (axlGetVariable "EMA_EDMInstall") "/ClientAdapter/Skill/edm_menu.il"))
  
```

Example of Older Allegro.ilinit File

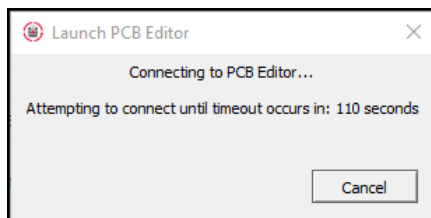
4. Delete any axlSetVariable lines that are related to EDMInstall or EDMRoot and reinstall the EDM client. The following is a sample of a correct Allegro.ilinit file.



Example of Correctly Installed allegro.ilinit File

2.3 EDM Fails to Connect to PCB Editor

When EDM Desktop application is open and you select an option that requires PCB Editor, a connecting to PCB Editor pop-up window appears while EDM launches and attempts to connect to PCB Editor.



EDM will try for 2 minutes before declaring a failure.

Possible causes for connection failure:

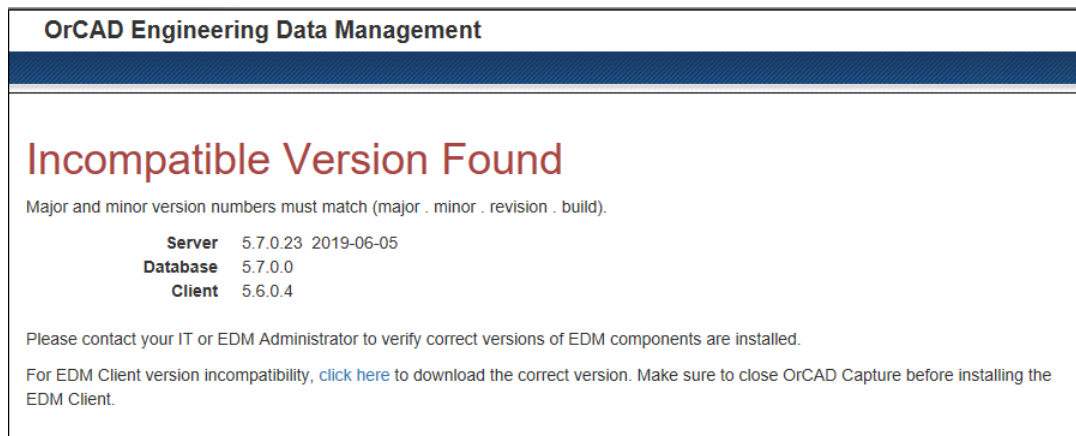
1. Installed version of EDM is not the same version of PCB Editor launched. For example, you have EDM 17.4 installed and PCB Editor being launched is version 17.2. To resolve this issue, verify that both EDM and PCB Editor are running the same version.
2. A Cadence Allegro Product Choice pop-up window is open, but hidden behind other windows and awaiting your selection of the product to open. To resolve this issue, locate the Product Choice pop-up window and select a product.
3. The Allegro.ilinit file was corrupted in some way during installation or an update of this file. For this case, you will not see the EDM menu Item in PCB Editor when opened. To resolve this issue, review information in section for [Trouble with EDM menu Item in PCB Editor](#).

2.4 Incompatible Version Error After Log In

EDM Server and Client must at compatible level to function properly. There are 2 ways that incompatible versions can occur:

1. Your Administrator updated the EDM server and you have not
2. You may have downloaded and installed a later version before the EDM Server has been upgraded.

When you see an error message as shown in the following figure, click on the link to download and install the compatible version of the EDM Client.

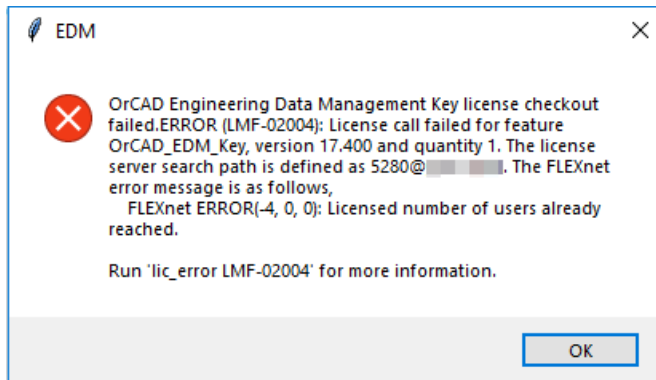


Note: You may need to uninstall first.

2.5 License Error After Log In

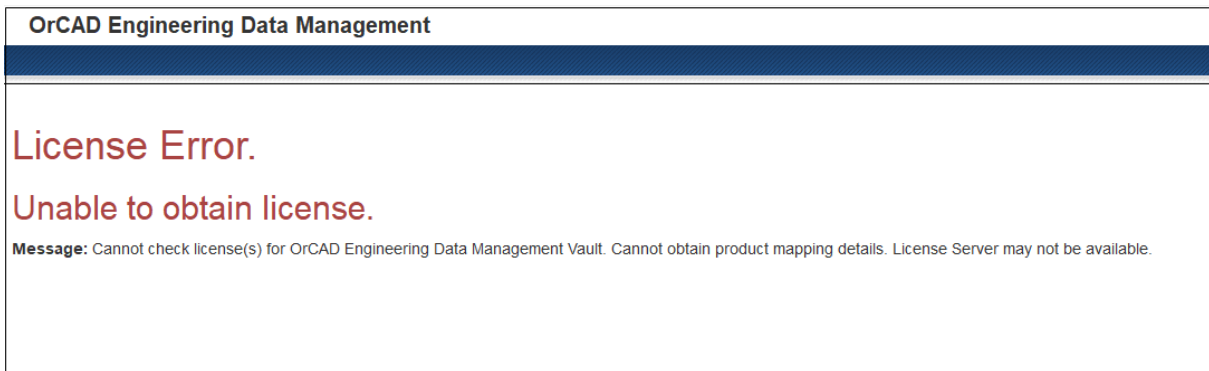
Both EDM Server and Client components require separate licenses. Errors from failing to check out a license by EDM Client is different than by EDM Server.

When the EDM Client (the Capture plug-in) fails to get a license, a pop up identifying the license issue appears when attempting to open EDM from within Capture or opening the EDM desktop.



You may need to contact your license administrator to help you resolve your problem.

When EDM server fails to get a license, the error message appears from the web page after logging in. To confirm that the EDM server has a problem checking out a license, bring up a browser, type the EDM URL and log in.



You will need to contact your IT or EDM administrator to resolve this problem.

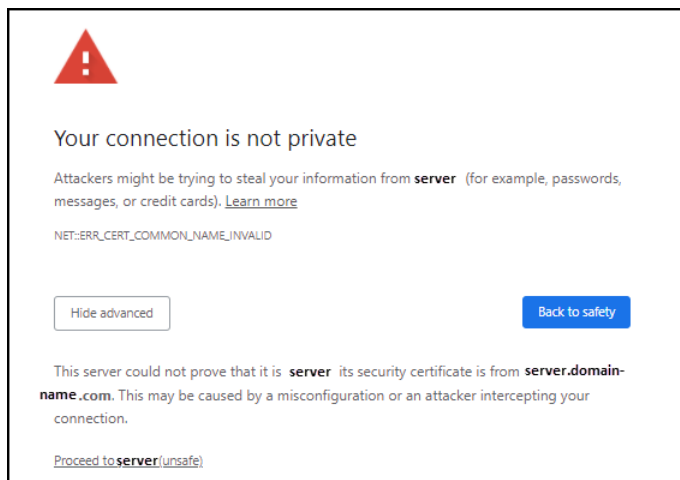
2.6 EDM Shows Blank Screen

Blank EDM screen inside Capture may be caused by one of two scenarios.

1. [Certificate Warning not shown in Capture](#) - When you open EDM while in Capture, a blank screen shows whereas when you open EDM in a standard browser, you see a certificate warning where you can accept risks to continue.
2. [Domain Login issue](#) - When you log in from inside Capture using Windows Domain login, you see a blank screen. However, when you log in using a standard browser with Windows Domain login, you are able to see the EDM landing page after you enter your credentials.

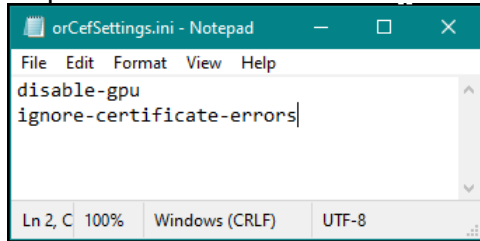
Certificate Warning Issue

If your EDM website is set up with a certificate that is not recognized as a valid certificate by a browser, the browser shows a certificate warning. A sample figure of the warning is shown below.



Sample Certification Error

Each browser shows this warning until you accept the risk and proceed to the site. To accept the risk while using the browser inside Capture, insert "ignore-certificate-errors" into the orCefSettings.ini located in C:\Cadence\SPB_17.4\tools\bin\ as shown in the following figure. Update this file for all users.



EDM Blank Screen with Windows Domain Log In

When you log in using Windows domain login from a standard browser and you are required to re-authenticate, the browser will automatically open a pop up for you to enter your login information. The need to re-authenticate is related to trust not having been established between the client browser and the domain where EDM is installed. Possible causes include:

- Your PC or VM hasn't been joined to the domain.
- You logged into your PC or VM using a local login.
- Your EDM website URL is entered using an IP address.
- Your EDM website URL is entered using a fully qualified domain name (FQDN).

Potential solutions include:

- Ensure that your PC or VM is joined to the domain and is trusted by the domain.
- Ensure that you are logged into your PC using your windows domain (not a local) login.
- If you must use an IP address or FQDN, add the domain to the list of trusted sites. To add a domain to trusted sites, select Start > Control Panel > Internet Options. Follow the steps shown in the following figure.

