

# How To Install PDM Professional 2023 Archive Server

TITLE:	How To Install PDM Professional 2023 Archive Server
DATE:	September 2022
SUBJECT:	Installation of 2023 SOLIDWORKS PDM Professional Archive Server
ABSTRACT:	Comprehensive installation guide of SOLIDWORKS PDM Professional Archive Server



This guide is written for SOLIDWORKS PDM Professional 2023. This guide can be used if you are using an earlier version because the general process is very similar.

The role of the archive server is to store and host the physical files that are saved into the file vault, as well as managing the users and their credentials for the SOLIDWORKS PDM Professional system. In order for a user to access the files, they must connect to one of the archive servers hosting the files.

This document covers loading the archive server components and configuration of the archive server to access it.

Hawk Ridge Systems highly recommends taking a moment before installing SOLIDWORKS and checking that you are ready to load your new software. First, ensure that your system meets minimum system requirements for the products you are installing. Also, be sure to backup any sensitive data, like any existing archive files.

This is not a troubleshooting guide. If you have any technical issues with SolidWorks, please contact <u>Hawk Ridge Systems technical support</u>.

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# **SOLIDWORKS PDM Professional Archive Server**

The archive server service runs from the system it is installed on in order to send and receive files from the users.

To reduce the chance of problems coming from attaching to the archive server, it is recommended that the server name is 15 characters or less.

### **Before Installation**

Set up the users, accounts and permissions required to complete the archive server installation.

#### **Root folder access**

Full access must be granted to the system account in order for it to create the folders and files in the designated root folder of the archive server. Alternatively, the root folder can be located on a network share as long as the archive server service has the ability to read and write files to it.

# The log-on account can be changed in the service properties under the archive server service.

#### SQL user account

A SQL user with at least db\_owner permissions to any existing file vault databases on the SQL server is required to relay information with the file vault.

Typically, the default **sa** account created during the SQL server installation is used.



#### User and group accounts

In order to specify the access rights for users and groups during the install, create them beforehand.

#### To use domain users, create a domain group on the controller containing the users who will be accessing the PDM vault.

- 1. Add the domain group using the Find User or Group dialog during the install. Users will then populate into the PDM Administration tool
- 2. Afterwards, you can add or change the user or groups using the Archive Server Configuration tool.

### **Performing the Archive Server Installation**

- 1. Login to the system under a user that has local administrative rights.
- 2. Insert and run the SOLIDWORKS Installation disc 1 or run the "Setup.exe" file inside your downloaded installation folder.
- You will be shown the following screen. Click Install server components radio button and Install SOLIDWORKS PDM Server as well as Install SolidNetWork License Manager if a 2023 version is not yet installed, then click Next.

SOLIDWORKS 2023 PR1 Installation Manager	- 🗆 X
<b>3S SOLID</b> WORKS	2023
Welcome to the SOLIDWORKS Installation Manager SOLIDWORKS 2023 PR1	
Specify the type of installation:  Install on this computer Create an administrative image to deploy to multiple computers Install source of the server components on this computer. Install SOLIDWORKS Manage Server components on this computer. Install SOLIDWORKS POB Server components on this computer. Install SOLIDWORKS Electrical (share data) on this computer. Install SOLIDWORKS PCB Services on this computer. Install SolidWork PCB Services on this	
Cancel Help	Next



4. Click **Change** to the right of the SOLIDWORKS PDM Server label. You may also select **Change** to the right of the SolidNetWork License Manager label if you need to update the location of it.

2	2
	_
Chang	e 🥒
SOLIDWORKS PDM Professional	_
C:\Program Files\SOLIDWORKS Corp\SOLIDWORKS PDM	
Archive Server	_
Chang	e 🤌
C:\ProgramLIDWORKS Corp\SolidNetWork License Manager	
Chang	e 🤌
Download and install	
C:\Users\PapersKS Downloads\SOLIDWORKS 2023 Pre Release 1	
Automatic download	
Future service packs	
Estimated download size:	193 MB
	C:\Program Files\SOLIDWORKS Corp\SOLIDWORKS PDM Archive Server C:\ProgramLIDWORKS Corp\SolidNetWork License Manager C:\DrogramLIDWORKS Corp\SolidNetWork License Manager C:\Users\PapersKS Downloads\SOLIDWORKS 2023 Pre Release 1 Automatic download



 Select SOLIDWORKS PDM Professional (formerly Enterprise PDM) as well as Archive Server. You may select Database Server and Client as well if you wish to put these on this same machine. We generally recommend that a PDM client be installed on any machine acting as a primary or replicated archive server.

SOLIDWORKS PDM Server  Select Server Product  SolLDWORKS PDM Standard SolLDWORKS PDM Professional  SolLDWORKS PDM Professional  SolLDWORKS PDM Professional  SolLDWORKS CorplSOLIDWORKS PDM Browse  Solution  Solution S	SOLIDWORKS 2023 PR1 Installation Manager	- 0 >
Select Server Product          SOLIDWORKS PDM Standard         SOLIDWORKS PDM Professional         Installation Location         C:\Program Files\SOLIDWORKS Corp\SOLIDWORKS PDM         Browse         Select Features         Archive Server         Database Server         C (Find         Web2 Server         Web API Server	<b>35 SOLID</b> WORKS	202
SOLIDWORKS PDM Standard            SOLIDWORKS PDM Professional            ✓ Installation Location             C:\Program Files\SOLIDWORKS Corp\SOLIDWORKS PDM             C:\Program Files\SOLIDWORKS Corp\SOLIDWORKS PDM             ✓ Select Features             ✓ Client             Web 2 Server             Web API Server             Web API Server	SOLIDWORKS PDM Server	
SOLIDWORKS PDM Professional   Installation Location     C:\Program Files\SOLIDWORKS Corp\SOLIDWORKS PDM   Browse   Select Features     Archive Server   Database Server   Client   Web API Server   Web API Server	V Select Server Product	
✓ Installation Location    C:\Program Files\SOLIDWORKS Corp\SOLIDWORKS PDM   Ø Select Features   ✓ Select Features   ✓ Client   ① Otabase Server   ② Client   ③ Web 2 Server   ③ Web API Server	SOLIDWORKS PDM Standard	
C:\Program Files\SOLIDWORKS Corp\SOLIDWORKS PDM Browse Select Features Archive Server Database Server C Client Web2 Server Web API Server X et al. (1) (1) (1) (1) (1) (1) (1) (1) (1) (1)	SOLIDWORKS PDM Professional	
✓ Select Features ✓ Archive Server ○ Database Server ○ Client ○ Web 2 Server ○ Web API Server ✓ Web API Server	✓ Installation Location	
Archive Server Database Server Client Web2 Server Web API Server	C:\Program Files\SOLIDWORKS Corp\SOLIDWORKS PDM	Browse
Archive Server Database Server Client Web2 Server Web API Server	✓ Select Features	
Database Server C Glient Web2 Server Web API Server X ?		
Client Web2 Server Web API Server		
Web API Server		
× ? <	U Web2 Server	
	Web API Server	
	X ?	<
ancel Help Back to Summa	Cancel Help	Back to Summar

6. You may now click **Back to Summary** and **Install Now**.



# **Configuring the Archive Server**

Once the initial installation has completed, complete the configuration using the following instructions:

1. Select **Next** on the welcome screen.



2. Select the folder path to where the root folder of the SOLIDWORKS PDM Professional vault should be installed and select **Next.** 

Archive Server Configuration	×
Archive folder Accept the default folder for Conisio file vault archives.	Z
Select a archive folder where Conisio should store the file vaults. The archive folder should be in a sub folder on the hard drive.	
Note that this folder and its file vault sub folders should be included in the daily backup re on the server.	outine
Folder path: gram Files\SOLIDWORKS Corp\SOLIDWORKS PDM\Data	
< Back Next > (	Cancel



3. Select a password for the default "Admin" user and select **Next**.

Archive Server Configuration	×
Admin password Set the default admin login password.	R
Select a password for the default "Admin" user. The file vault and is the only user present in a newly created the second	
Password:	
Confirm password:	
	< Back Next > Cancel

4. Input the SQL user and login that SOLIDWORKS PDM Professional will use to log into the SQL server and select **Next**.

Set the default SQL user login SOLIDWORKS PDM file vaul	d n and password used when communicating with t databases.
with file vault databases on the SC	DWORKS PDM should use by default when communicating L server. Note that this user must have at least "db_owner RKS PDM databases. You can specify a different SQL user raults if needed.
SQL user login:	1
Password:	
Confirm password:	



5. Select the Windows accounts/groups that should have either normal or administrative access and select Next. Adding users or groups here tells the Archive Server to grant attach or admin access for these users/groups. Without the appropriate access permissions, users will be forced to authenticate against the archive server when they attempt to add their local vault view. The result would be the user being prompted with a PDM login window that shows the PDM server computer name and would require the user to enter in a Windows username and password (local or domain admin) in order to authenticate.

Archive Server Configuration			×
Security Set archive server access options.			2
Select which Windows accounts should har attach to file vaults) or attach access (may o			
Available users and groups: Access Control Assistance Operate Administrator (PS51A8343\Adminis Administrator (PUII) Administrator	>	Administrative access: Administrators (BUILTIN\Administ Power Users (BUILTIN\Power Us Users (BUILTIN\Users)	
Administrators (BUILTIN\Administra Backup Operators (BUILTIN\Back Certificate Service DCOM Access		Attach access:	
Cryptographic Operators (BUILTIN	>	Administrators (BUILTIN\Administ Power Users (BUILTIN\Power Users)	
Find User or Group		< >>	
		< Back Next > Car	ncel

6. Choose the default login type for the SOLIDWORKS PDM Professional vault and select **Next**.

-	<b>n type</b> Choose default login type.		E
C	SOLIDWORKS PDM login		
19	C Windows login (SOLIDWORKS	PDM Professional only)	
	C LDAP login (SOLIDWORKS PE	OM Professional only)	
	se the default login type you wish to u ve server.	se for SOLIDWORKS PDM file	vaults created on this
	DWORKS PDM login is the simplest ty types o <mark>f login.</mark>	pe of login, and cannot be syn	chronized with any
	Windows login, you will select Window he logged in Windows user at the clie		an be synchronized
	<sup>9</sup> login is primarily meant to be used wi Iedge about directory contexts.	th Novell NDS and eDirectory a	ind requires
		< Back Next	> Cancel



7. Complete the installation by selecting **Finish**.



## **Opening Ports for Client/Server Communication**

Most Windows operating systems have built-in software firewalls that are enabled by default. These features can restrict network access to applications requiring connections over the TCP/IP interface.

In order for the archive server to communicate with the client systems, TCP port 3030 must be fully opened by the firewall.

You should also open up the UDP port to allow the server to announce itself, by name, on the network. This means that the users will see the name of the server in the drop-down list.

The ports required to be opened for the SQL server to talk with the client systems are TCP ports 1433 and 1434. SOLIDWORKS PDM Professional Web Server requires ports 80 and 443 to be opened. The SolidNetwork License Manager requires ports 25734 and 25735.

Communication Originating Form						
Listening/Receiving	Client	Archive Server	Database Service	SQL Server	Web Server	
Client						
Archive Server	3030	3030	3030		3030	
Database Service						
SQL Server	1433/1434	1433/1434	1433/1434		1433/1434	
Web Server	80/443					



Microsoft disables outbound filtering by default. However, your administrators may have created outbound rules that restrict traffic to approved applications on your network. If the client or replicated server can't reach the SQL or Archive server, ensure that the ports are not restricted in the firewall settings.

## **Adding Archive Servers in WAN Environment**

SOLIDWORKS PDM Professional clients are normally set up to communicate with the Archive and SQL server using the server system names. The names must be able to resolve to the correct IP addresses.

If the name lookup fails or is slow, it can cause the following problems:

- Clients can't find the servers, a common issue when using subnets or WAN configurations.
- Performance degradation using EPDM such as logging in, browsing, or adding files.
- Archive Server replication failures.

#### Verifying That the Server Name Can Be Resolved

To ensure optimal performance, make sure that the DNS server configuration is set up to resolve names correctly and efficiently.

- 1. Open the command prompt by clicking Start  $\rightarrow$  Run  $\rightarrow$  CMD.
- 2. Type *ping <server\_name>*.

If the server can be reached by name, a reply with the server IP address appears. For example:

#### PING SRV-DEV-15

*Reply from 192.168.1.71: bytes=32 time<1ms TTL=128* 

3. Verify that the correct IP is returned

If DNS returns the wrong IP address, a different system than the server responds.

If the server name cannot be resolved, the DNS server configurations is not correctly configured. For example:

PING SRV-DEV-15

Ping request could not find host SRV-DEV-15. Please check the name and try again.



#### Configuring the Hosts File to Resolve the Server Name

If the DNS servers cannot be configured or performance is still bad, update the client's hosts file with the correct server name and IP address. This ensures that the hosts file is queried for the server address directly instead of waiting for the DNS name to resolve.

To configure the hosts file to resolve the server name:

1. On the SOLIDWORKS PDM Professional client, locate the Hosts file.

The default location is:

*C:\Windows\System32\Drivers\Etc\* 

- 2. Open the file in a text editor. (such as Notepad)
- 3. Add a new line and enter the server IP address followed by the server name.

For example:

192.168.1.71 SRV-DEV-15

- 4. Repeat Step 3 for any additional servers used by SOLIDWORKS PDM Professional
- 5. Save and close the hosts file.