

Quick Steps for Upgrading the PDM Server

TITLE:	Quick Steps for Upgrading the PDM Server
DATE:	December 2016
SUBJECT:	PDM Server Upgrade
ABSTRACT:	This guide provides a step-by-step process to upgrade PDM 2016 or 2017 to a new service pack or year version

The PDM Server upgrade process can be broken down into a few easy to follow steps. This guide was created with SOLIDWORKS PDM 2016 and 2017 in mind. The same upgrade steps apply to EPDM 2015 and earlier versions, however, menus and file locations will be different and the optional steps to install the SolidNetWork License Manager will not be available.

This guide does not include instructions on installing the PDM client to computers not hosting the PDM server. For information on installing the PDM client please follow this [link for PDM 2016 client](#) or [this link for the PDM 2017 client](#).

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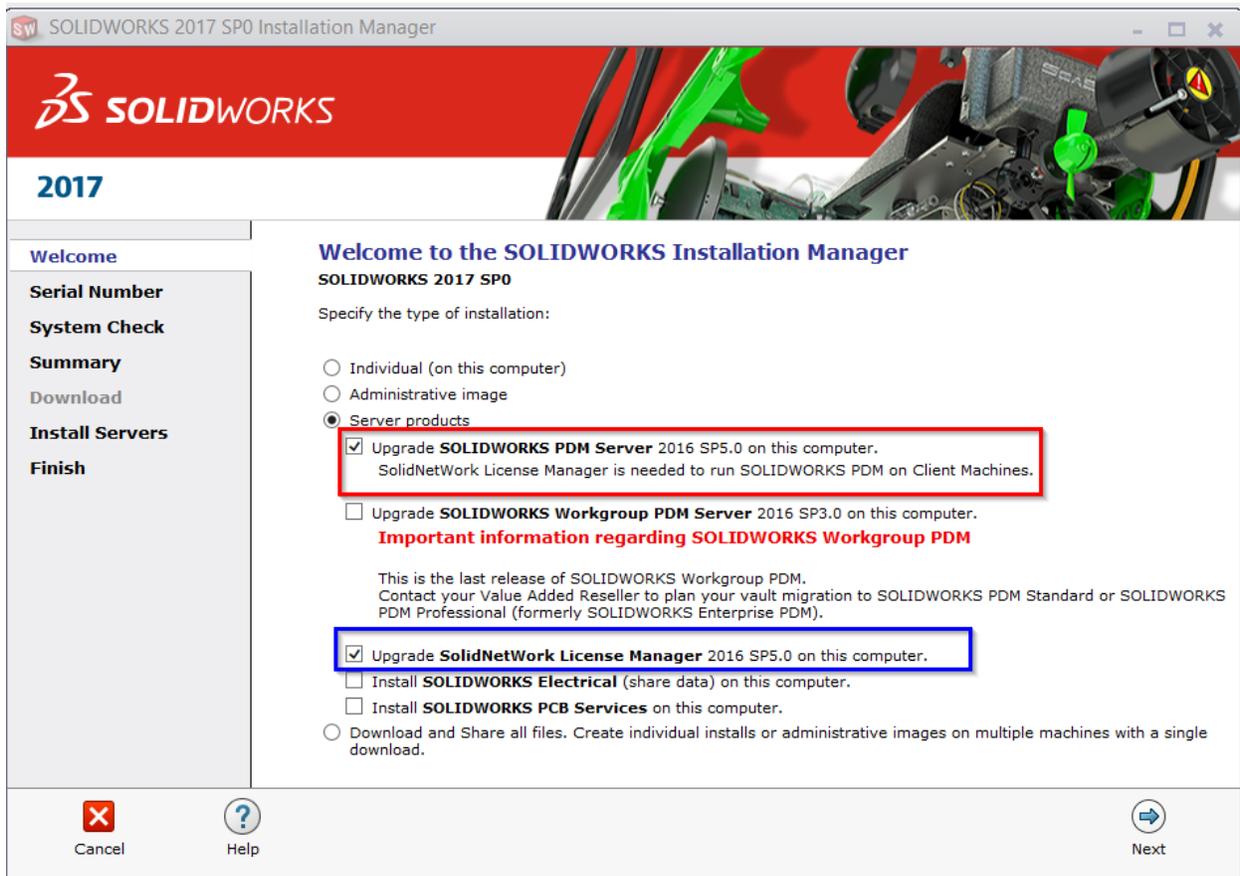
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Upgrade

To begin, run the setup.exe from your SOLIDWORKS installation files or DVD. Disregard any messages suggesting you need a computer restart by pressing OK.

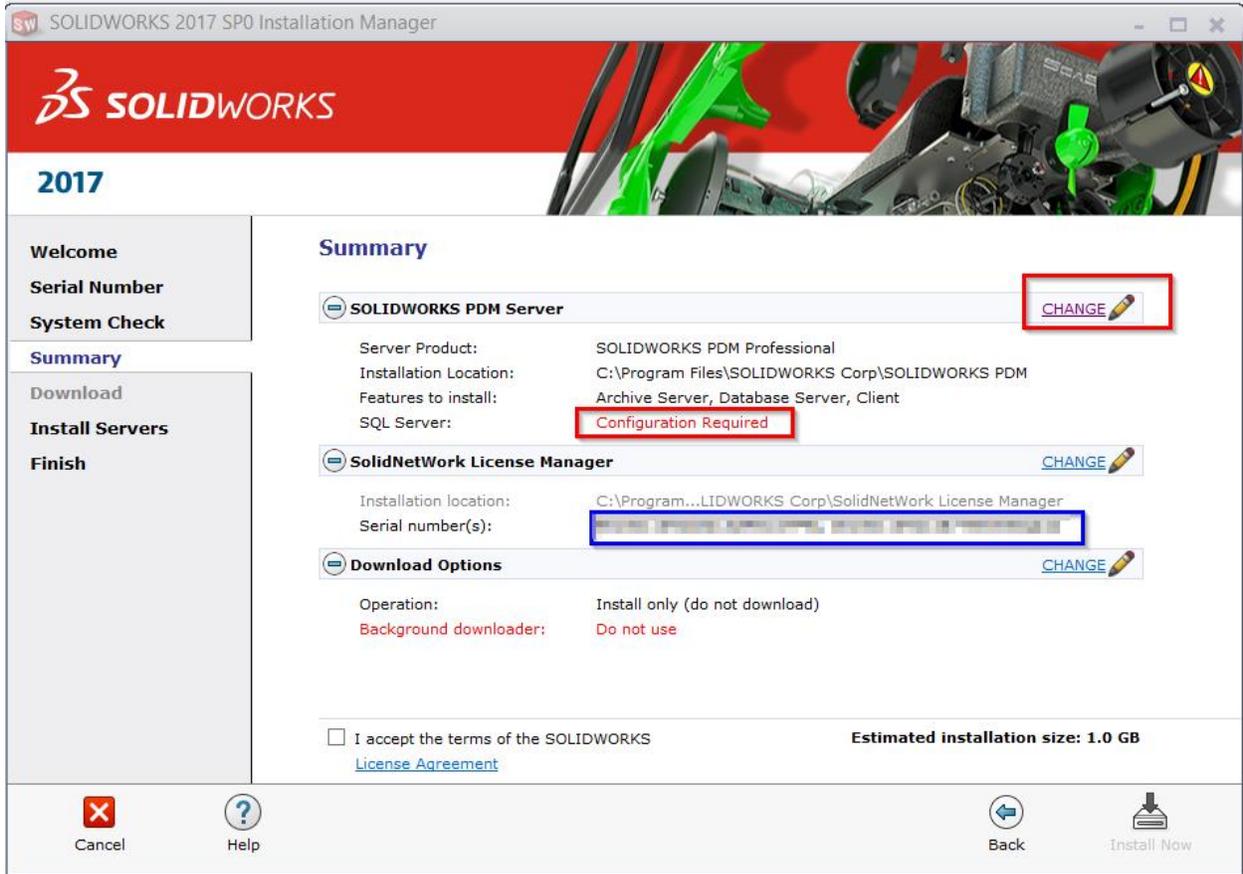
When the Installation Manager is open, select the Server Products radio button and select to upgrade the PDM server.

Optional (Blue): The SolidNetWork License Manager can be selected to update at the same time.



Our next step is to configure the PDM server options for the upgrade. Select the change link to do so.

Optional: If you selected to upgrade the SolidNetWork License Manager please verify all of your network serial numbers are present and correct. If not, select the change button to modify them.



SOLIDWORKS 2017 SPO Installation Manager

2017

Welcome
Serial Number
System Check
Summary
Download
Install Servers
Finish

Summary

SOLIDWORKS PDM Server [CHANGE](#)

Server Product: SOLIDWORKS PDM Professional
Installation Location: C:\Program Files\SOLIDWORKS Corp\SOLIDWORKS PDM
Features to install: Archive Server, Database Server, Client
SQL Server: Configuration Required

SolidNetWork License Manager [CHANGE](#)

Installation location: C:\Program...LIDWORKS Corp\SolidNetWork License Manager
Serial number(s):

Download Options [CHANGE](#)

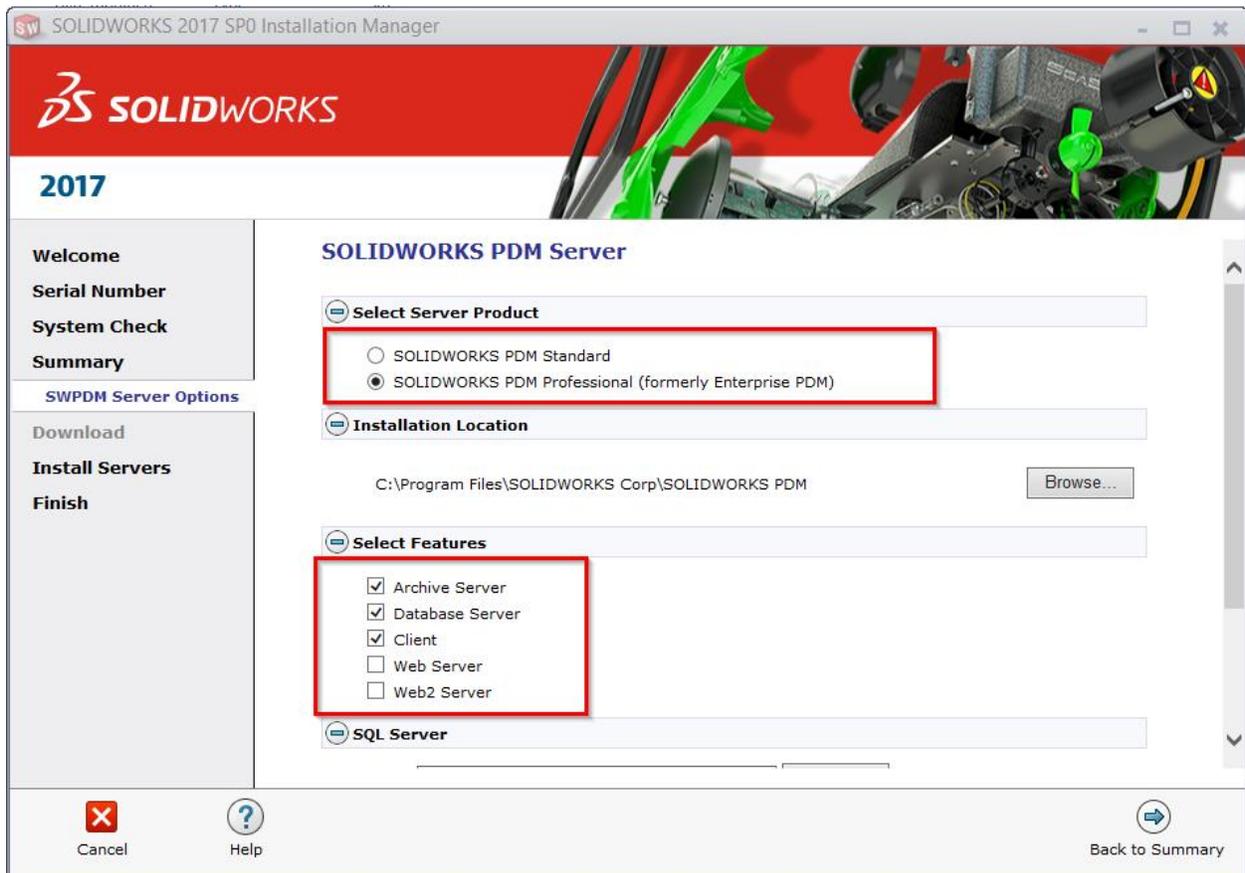
Operation: Install only (do not download)
Background downloader: Do not use

I accept the terms of the SOLIDWORKS [License Agreement](#) **Estimated installation size: 1.0 GB**

Cancel Help Back Install Now

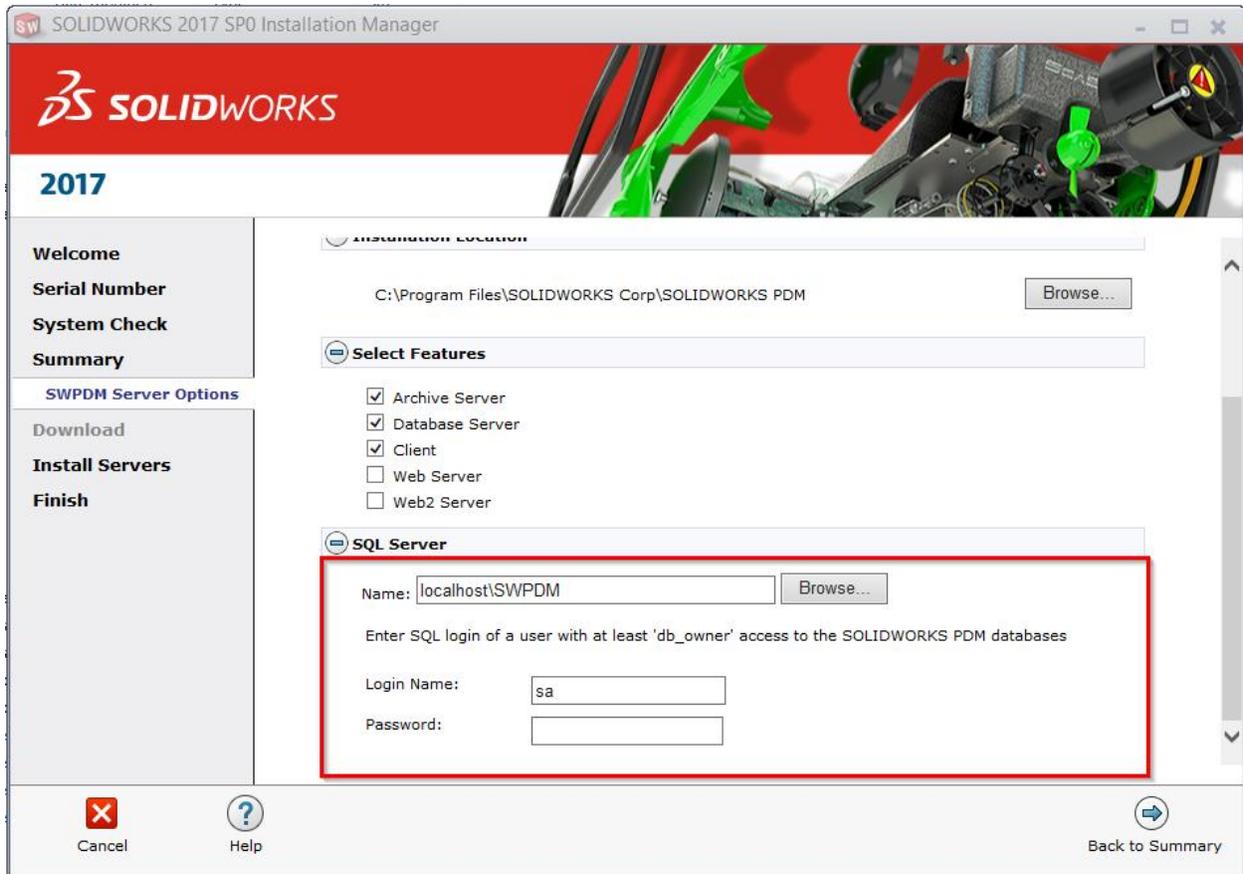
On The PDM Server configuration page we should select the PDM Server version we want to install first, then we can select the features that should be installed.

Note: We recommend having the PDM client installed on the PDM server. This allows us access to the PDM administration tool on the server which is useful for testing and diagnosing issues.



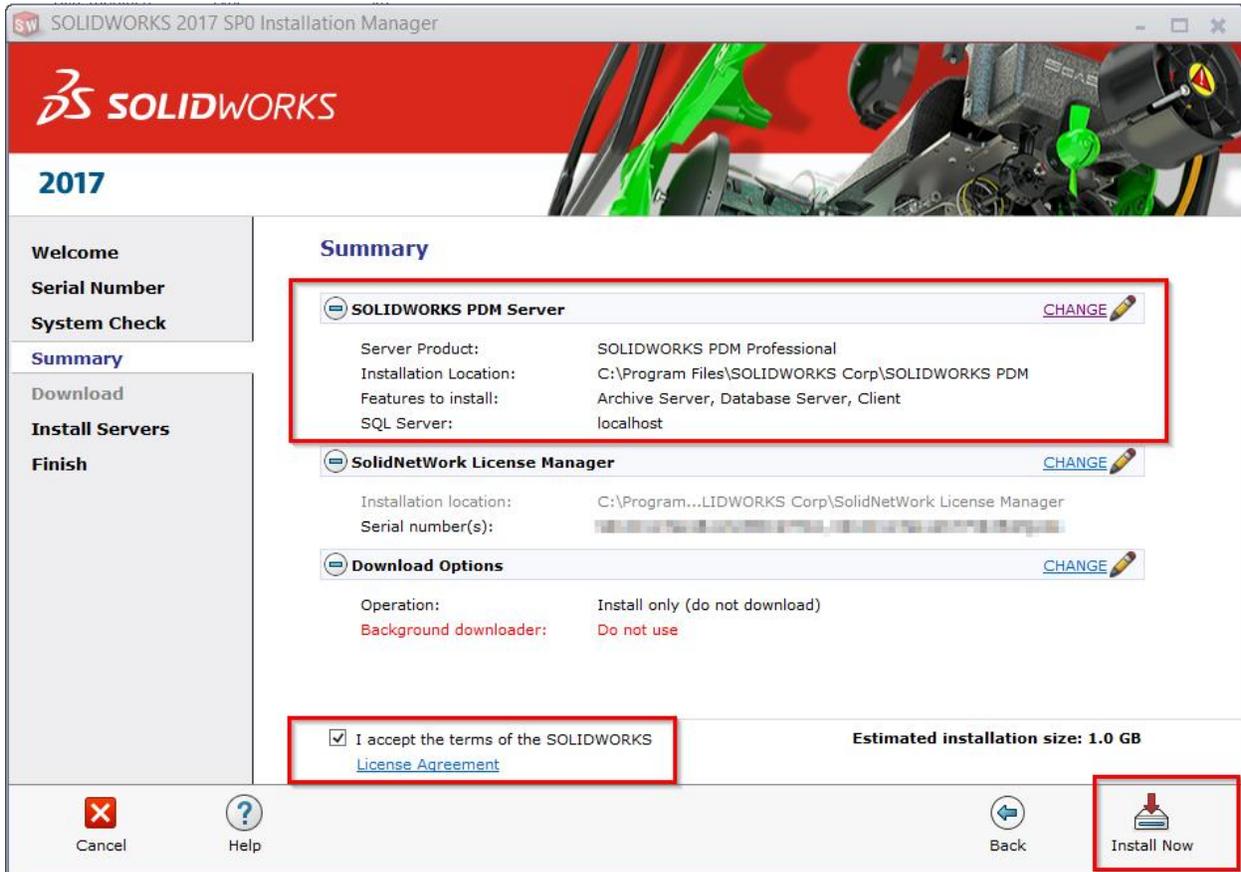
The last step of the PDM Server configuration is to input your SQL server location and the sa (system administrator) password. If your SQL server is managed with a different user name and password you can enter those instead. Keep in mind the account PDM uses needs db_owner privileges for all PDM related SQL databases.

Once this information is entered, select the back to summary button. If the information above is entered incorrectly, you will be presented with an error message.



Once the PDM server has been configured we'll notice that the SQL server is listed and the "configuration required" message is gone.

Select to accept the license agreement and we can proceed with the installation.

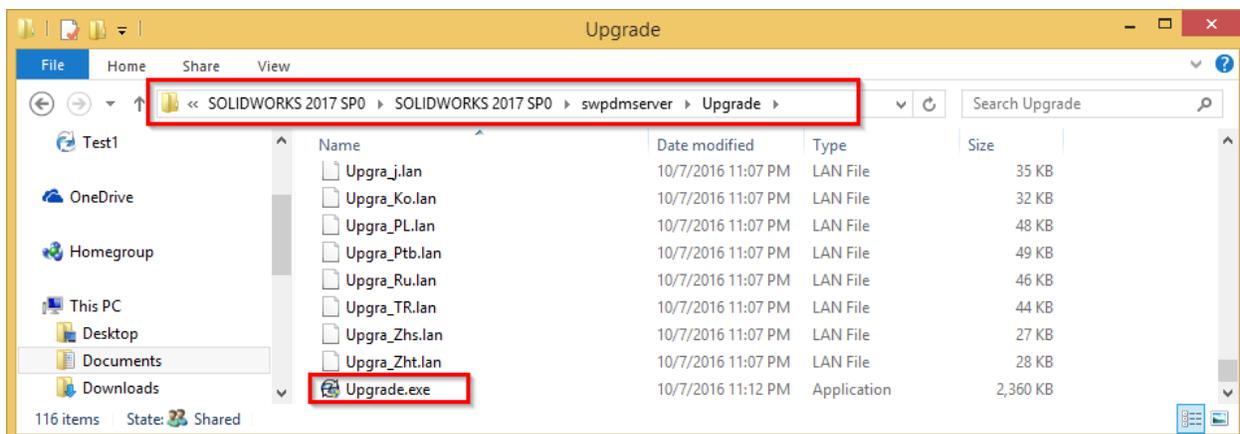


SQL Database Upgrade

Once the installation is complete, we need to upgrade our PDM SQL Databases to match our new server software versions. To do this, navigate to your SOLIDWORKS/PDM software installation directory (this can be on the DVD) and we'll be looking for a specific subfolder.

In the screenshot below an example folder path is highlighted. We need to look for the subfolder swpdmserver\Upgrade and run the upgrade.exe highlighted below.

Note: For this tool we will also need our SQL server location and sa password.



Testing for Errors

Once the upgrade utility is complete, please test logging into your PDM server, preferably on the server itself with the PDM administration tool that was installed with the PDM client.

If you are able to login without error then the upgrade process was successful. At this point, please have a PDM user test their local vault view connection to the PDM server.

Note: All PDM client computers need their PDM client to be the same software version as the PDM server. For this example the PDM server was upgraded to PDM 2017 SP0, so any PDM clients would need to be upgraded to SOLIDWORKS/PDM 2017 SP0

If there are errors logging into the PDM Server administration tool on the PDM server itself, please note the error. If the error states that the database version is incorrect then the issue is likely with the PDM SQL Database upgrade utility.

Otherwise, please contact Hawk Ridge Systems for support with the error message.

