

### 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 <u>link for PDM 2016 client</u> or <u>this link</u> for the PDM 2017 client.

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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.

SOLIDWORKS 2	017 SP0 Inst	allation Manager	- 🗆 🗙
2017	DWOR	rks	
Welcome		Welcome to the SOLIDWORKS Installation Manager	
Serial Number		SOLIDWORKS 2017 SP0	
System Check		Specify the type of installation:	
Summary		O Individual (on this computer)	
Download		O Administrative image	
Install Servers		Server products	
Finish		Upgrade SOLIDWORKS PDM Server 2016 SP5.0 on this computer. SolidNetWork License Manager is needed to run SOLIDWORKS PDM on Client Machines.	
		Upgrade SOLIDWORKS Workgroup PDM Server 2016 SP3.0 on this computer.	
		Important information regarding SOLIDWORKS Workgroup PDM	
		This is the last release of SOLIDWORKS Workgroup PDM. Contact your Value Added Reseller to plan your vault migration to SOLIDWORKS PDM St PDM Professional (formerly SOLIDWORKS Enterprise PDM).	andard or SOLIDWORKS
		Upgrade SolidNetWork License Manager 2016 SP5.0 on this computer.	
		Install SOLIDWORKS Electrical (share data) on this computer.	
		Install SOLIDWORKS PCB Services on this computer.	
		<ul> <li>Download and Share all files. Create individual installs or administrative images on multiple r download.</li> </ul>	machines with a single
×	?		۲
Cancel	Help		Next



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.SP	0 Installation Manager	
2017		
Welcome	Summary	
Serial Number	SOLIDWORKS PDM Server	CHANGE 🥔
Summary Download	Server Product: Installation Location: Features to install: SOI Server:	SOLIDWORKS PDM Professional C:\Program Files\SOLIDWORKS Corp\SOLIDWORKS PDM Archive Server, Database Server, Client Configuration Required
Install Servers Finish	SolidNetWork License Mar	nager CHANGE
	Installation location: Serial number(s):	C:\ProgramLIDWORKS Corp\SolidNetWork License Manager
	Download Options	CHANGE 🖉
	Operation: Background downloader:	Install only (do not download) Do not use
	I accept the terms of the SO	LIDWORKS Estimated installation size: 1.0 GB
Cancel He		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.

SOLIDWORKS 2017 SPO Ins	stallation Manager RKS	* - *
2017		
Welcome Serial Number	SOLIDWORKS PDM Server	-
System Check Summary	<ul> <li>Select Server Product</li> <li>SOLIDWORKS PDM Standard</li> <li>SOLIDWORKS PDM Professional (formerly Enterprise PDM)</li> </ul>	
Download Install Servers Finish	Installation Location C:\Program Files\SOLIDWORKS Corp\SOLIDWORKS PDM Browse	
	<ul> <li>Select Features</li> <li>Archive Server</li> <li>Database Server</li> <li>Client</li> <li>Web Server</li> <li>Web Server</li> </ul>	
	SQL Server	
Cancel Help	Ba	ack to Summary



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.

SOLIDWORKS 2017 SP0 Inst	tallation Manager – 🗖	×
<b>35 SOLID</b> WOR 2017	RKS	
Welcome Serial Number System Check	C:\Program Files\SOLIDWORKS Corp\SOLIDWORKS PDM Browse	^
Summary	Select Features	
SWPDM Server Options Download Install Servers Finish	<ul> <li>Archive Server</li> <li>Database Server</li> <li>Client</li> <li>Web Server</li> <li>Web2 Server</li> </ul>	
	SQL Server  Name: localhost\SWPDM Browse Enter SQL login of a user with at least 'db_owner' access to the SOLIDWORKS PDM databases Login Name:	
	Password:	~
Cancel Help	Back to Summ	nary



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.

solidworks 2017 s <b>35 SOLID</b> W	P0 Installation Manager			*
2017				
Welcome	Summary			
Serial Number	SOLIDWORKS PDM Server			
Summary Download Install Servers	Server Product: Installation Location: Features to install: SQL Server:	SOLIDWORKS F C:\Program File Archive Server, localhost	PDM Professional s\SOLIDWORKS Corp\SOLIDWORKS PDM Database Server, Client	
Finish	SolidNetWork License Man	nager		
	Installation location: Serial number(s):	C:\ProgramL	DWORKS Corp\SolidNetWork License Mar	nager
	Download Options			
	Operation: Background downloader:	Install only (do Do not use	not download)	
	I accept the terms of the SO License Agreement	LIDWORKS	Estimated installatio	n size: 1.0 GB
Cancel H	?) telp		(a) Back	Install Now



#### 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.

III I 🕞 III ≠ I	Upgrade					
File Home Share View						
🔄 🄄 👻 🕇 🚺 « SOLIDWOI	RKS 2017 SP0 → SOLIDWORKS 2017 SP0 → swpdms	erver → Upgrade →	~	C Search Upgrade	م	
🔁 Test1	Name	Date modified	Туре	Size	^	
	Upgra_j.lan	10/7/2016 11:07 PM	LAN File	35 KB		
le OneDrive	Upgra_Ko.lan	10/7/2016 11:07 PM	LAN File	32 KB		
	Upgra_PL.lan	10/7/2016 11:07 PM	LAN File	48 KB		
🤣 Homegroup	Upgra_Ptb.lan	10/7/2016 11:07 PM	LAN File	49 KB		
	Upgra_Ru.lan	10/7/2016 11:07 PM	LAN File	46 KB		
🖳 This PC	Upgra_TR.lan	10/7/2016 11:07 PM	LAN File	44 KB		
膧 Desktop	Upgra_Zhs.lan	10/7/2016 11:07 PM	LAN File	27 KB		
Documents	Upgra_Zht.lan	10/7/2016 11:07 PM	LAN File	28 KB		
🐌 Downloads	V 🔂 Upgrade.exe	10/7/2016 11:12 PM	Application	2,360 KB	~	
116 items 🛛 State: 🐉 Shared					==	



# **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.

6	SOLIDWORKS PDM Administration –				
File View Help					
SOLIDWORKS PDM Administration	B Recently Used				
a 📑 Por-josephm					
MicroMetl	Test1	N	<u>^</u>		
▲ M Local Settings	reser	~			
Group Policies					
Settings					
P Web Servers	User name:	admin			
	Password:				
			Log In 🔁 🛛		

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