

PLANNING A SOLIDWORKS 2018 UPGRADE

Introduction

This document is meant to give a general overview of the installation process and provide a simple checklist for system administrators getting ready to deploy SOLIDWORKS and PDM software. Detailed information for installation is available through the Hawk Ridge support portal here: [Help Desk Support Portal](#)

When deploying to any new version compatibility is a major concern. Network-based licensing requires that the license server is updated first to the new version. Without an updated license server, clients will be unable to check out the new version license. In PDM Standard and Professional environments clients must have the same major version as their target vault server.

Changes

Beginning in 2016, SolidWorks incorporated PDM Standard, and the integration of PDM installation with the SOLIDWORKS Installation Manager. Furthermore Enterprise PDM has changed to become PDM Professional, also beginning in 2016. 2018 PDM Standard or Professional can now be installed from the same interface as SOLIDWORKS.

Virtual machine support is limited to only the following platforms for use as a license server:

VMWare, Microsoft Hyper-V, Parallels, and Citrix Xen.

Other platforms will not be able to activate as license servers.

SOLIDWORKS 2018 does not support any 32-bit systems.



Contents

SOLIDWORKS Standalone Installation	3
Solidworks Network Licensed Setup	6
Pdm Professional Installation	8

SOLIDWORKS Standalone Installation

SOLIDWORKS standalone licensing is activation-based, meaning for each standalone license, one user can activate two of their machines – one for desktop and another for travel/home use.

a. Compatibility

SOLIDWORKS 2014 is the last year to support 32-bit operating systems. See the full compatibility in the table below:

Operating Systems	SOLIDWORKS 2016 (EDU 2016-2017)	SOLIDWORKS 2017 (EDU 2017-2018)	SOLIDWORKS 2018 (EDU 2018-2019)
Windows 10, 64-bit	✓	✓	✓
Windows 8.1, 64-bit	✓	✓	✓
Windows 7 SP1, 64-bit	✓	✓	✓
Hardware			
RAM	8GB or more recommended		
Video Card	Certified cards and drivers		
Processor	Intel or AMD with SSE2 support. 64-bit operating system required		
Install Media	DVD drive or broadband internet connection		
Microsoft Products			
Internet Explorer	IE 10,11	IE 11	IE 11
Excel and Word	2010, 2013, 2016 (SW2016 SP3)	2010, 2013, 2016	2010, 2013, 2016
Other			
Anti-Virus	Supported anti-virus products		
Network	Microsoft Windows networking. Novell networks and non-Windows network storage devices are not supported		
Virtual environments	Supported virtual environments		

For more information on hardware recommendations for SOLIDWORKS see our guides here:

[2018 Recommended Hardware](#)

[2018 Comprehensive Hardware Guide](#)

SOLIDWORKS requires a video card with a certified driver. It's best to update your video driver to the certified version found here before installation:

<https://www.SOLIDWORKS.com/sw/support/videocardtesting.html>

b. Licensing

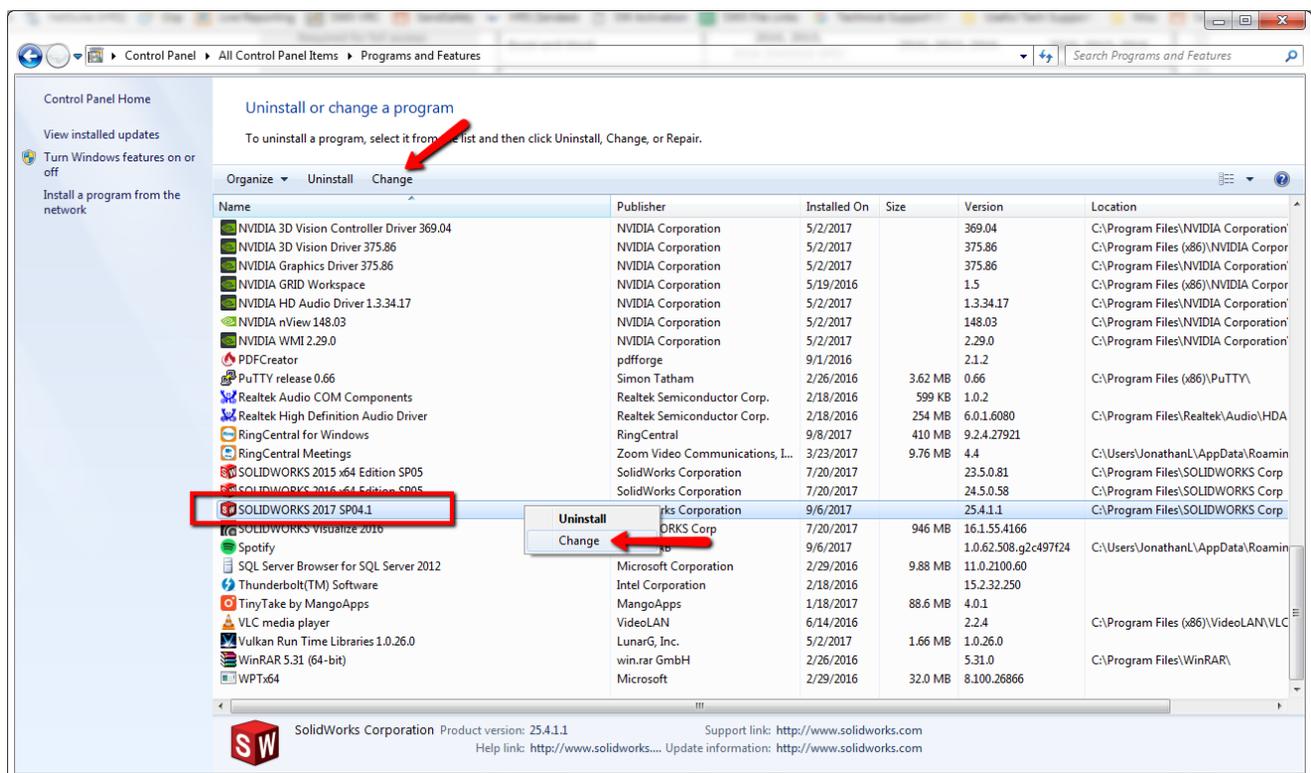
Each standalone license is allowed to be activated on only one machine. In order to use one Solidworks license on multiple machines, you must first deactivate the currently active machine before using Solidworks on the other machine. If you are planning to simply upgrade one machine from a previous version the activation will carry over. However if you need to switch machines or install on a new machine you will need to first deactivate the license from your old machine.

To deactivate your license: open SOLIDWORKS, then use the Help > Deactivate License feature. This feature deactivates the product on your current machine so it can be reactivated on the new machine. You can find more about the deactivation process in this guide here: [Transferring a Solidworks License Between Computers](#)

Then go to the new computer, install SOLIDWORKS, then start it and select Help > Activate, to proceed with the activation process.

Depending on your activation status you may also need to change the serial number of the installed version of SOLIDWORKS. For example, if you purchased a new license of SOLIDWORKS Premium and wanted to switch from a SOLIDWORKS Standard license.

To change the serial number of your SOLIDWORKS license: go to the windows control panel and select 'Programs and Features'. Find SOLIDWORKS in the list of programs highlight it and select 'Change':



This will launch the SOLIDWORKS installation manager. Select the option to 'modify' your current installation then input your new serial number. REMEMBER, if you currently have SOLIDWORKS active on your machine, you will need to deactivate this license first.

c. Access

SOLIDWORKS installation requires the use of an unrestricted administrator account. Turning off user account controls and any anti-virus software is also recommended during installation.

d. Copy Settings Wizard

The copy settings Wizard can be used to copy all the configuration of one version of SOLIDWORKS to the next. Making it possible to backup and restore SOLIDWORKS configuration across version.

e. Upgrading Hole Wizard/Toolbox

The Hole Wizard/toolbox is a critical component of SOLIDWORKS. To avoid data loss be sure to back up your Toolbox folder – the default location is found at C:\SOLIDWORKS Data. For more information please find our comprehensive toolbox guide here: [Comprehensive Toolbox Guide](#).

SOLIDWORKS Network Licensed Setup

The first step in a SOLIDWORKS upgrade is to upgrade the license server. License servers are backwards compatible but not forwards compatible. Therefore if you plan to use SOLIDWORKS 2018, you must have an updated 2018 license server. The detailed guide to the 2018 license manager installation can be found here:

[2018 Network Server Installation](#)

a. Network server version

Before starting the upgrade process review the operating system compatibility here:

Operating Systems	SOLIDWORKS 2016	SOLIDWORKS 2017	SOLIDWORKS 2018
Windows Server 2016	✘	✔ (2017 SP2)	✔
Windows Server 2012 R2	✔ 1	✔	✔
Windows Server 2012	✔	✔	✔
Windows Server 2008 R2, SP1	✔	✔	✘

b. Support for virtual machines

Currently only the following platforms virtual machine platforms will allow activation of a license server:

VMWare, Microsoft Hyper-V, Parallels, and Citrix Xen.

c. Client Installation

SOLIDWORKS network client installation is the same as standalone installation. The network license key is used to install SOLIDWORKS and no activation is required.

All clients must be able to freely communicate with the license server on port 25734 and 25735.

d. [Migration from standalone](#)

When switching workstations to use a network license, the first step will be to designate and install the SNL (SolidNetwork License) manager on the new license server.

Removing previous activations. Client installations will need to be modified to use the network serial number and receive their licenses from the license server. Follow the procedure to switch the licenses using the windows control panel -> Programs and Features -> highlight SOLIDWORKS and select 'change'. This will give the option to change the installed serial number and add the client license manager.

e. [Admin image deployment](#)

Creating an admin image for deployment provides a method to create a single image to be pushed out to each client machine. Images can be customized per machine to change installation modules for specific workstations.

f. PDM Version

Before updating your clients and license server, it is important to consider if you have an active PDM system as this system will need to be upgraded as well. With SOLIDWORKS Professional, Standard clients, if you wish to use a newer version of SOLIDWORKS your PDM vault and client software will need to be upgraded as well. A newer client will be unable to connect to an older vault.

g. License Troubleshooting

The most common error associated with a network license is the Windows firewall blocking access to the license server. Make sure that the ports 25734 and 25735 are open on all clients and the license server.

PDM Professional Installation

PDM Professional consists of three modules: Archive server, Database server and clients. Each of these must be updated to work together. Before upgrading, be sure to have a backup of your SQL database and vault data. Once you have current backups, you will need to have logins to the SQL SA user account and Vault Admin account to complete the installation.

a. Change in licensing method

2015 and forward, added activation based licensing for PDM Professional using the SolidNetwork license manager. Licenses for PDM Professional are now managed through the SNL with FlexLM, giving administrators real-time information on license usage.

b. SQL Server installation

PDM Professional does not include a copy of SQL server. Either a current installation will need to be used or a new install created. Hawk Ridge systems can provide installation media for SQL server 2014. PDM Professional is only compatible with SQL Server 2008 R2 and newer.

c. Vault and Client Version

All clients must be running the same major version of the PDM Professional software as the vault.

SOLIDWORKS PDM (CAD Editor, Contributor, Viewer), SOLIDWORKS Manage

Microsoft Products	2016	2017	2018
MS Office Document Support	2010, 2013	2010, 2013	2010, 2013, 2016
Hardware			
RAM	8 GB (4 GB for Contributor/Viewer) or more recommended		
Disk Space	10 GB or more		
Processor	Intel or AMD with SSE2 support. 64-bit operating system required		
Other			
Anti-Virus	Supported anti-virus products		
Networking	Microsoft Windows networking. Novell networks and non-Windows network storage devices are not supported		
Virtual environments	Supported virtual environments		



SOLIDWORKS PDM - Archive Server & Database Server

SQL Server Platform	2016	2017	2018
SQL 2016	✘	✔	✔
SQL 2014	✔	✔	✔
SQL 2012	✔	✔	✔
SQL 2008 R2	✔	✔	✘
Hardware			
RAM	8 GB or more recommended		
Disk Space	50 GB or more		
Processor	Intel or AMD with SSE2 support. 64-bit operating system required		
Other			
Virtual environments	Supported virtual environments		

d. Web Client and Server

SOLIDWORKS PDM - Web Client (PDM Professional only)

Web Browser	2016	2017	2018
Internet Explorer	IE 9,10,11	IE 9,10,11	IE 9,10,11
Hardware			
RAM	4 GB or more recommended		
Disk Space	5 GB or more		
Processor	Intel or AMD with SSE2 support. 64-bit operating system required		

SOLIDWORKS PDM - Web2 Client (PDM Professional only)

Web Browsers	2016	2017	2018
Supported: Microsoft Internet Explorer, Microsoft Edge, Google Chrome, Mozilla Firefox, Apple Safari			

SOLIDWORKS PDM - Web Server (PDM Professional only)

Operating Systems	2016	2017	2018
Windows Server 2016 & Information Services (IIS)	✘	✔	✔
Windows Server 2012 R2 & Information Services (IIS)	✔	✔	✔
Windows Server 2012 & Information Services (IIS)	✔	✔	✔
Windows Server 2008 R2, SP1 & Information Services (IIS)	✔	✔	✘
Hardware			
RAM	4 GB or more		
Disk Space	5 GB or more		
Processor	Intel or AMD with SSE2 support. 64-bit operating system required		
Other			
Virtual environments	Supported virtual environments		