2018 PDM Client Installation

TITLE:	PDM Client Installation Guide
DATE:	September 2017
SUBJECT:	PDM client install
ABSTRACT:	Comprehensive guide on installing the PDM client for SOLIDWORKS 2018

This guide is written for users of both SOLIDWORKS PDM Standard and Professional. This guide cannot be used to install versions before 2016 of PDM because the process has changed. For more information about installing earlier versions of our PDM software, please see our Help Center.

A SOLIDWORKS PDM vault is used to manage documents. A SOLIDWORKS PDM Client is the software installed on a computer that will allow access to the vault. After the client software is installed, you can create a local vault view to connect and access documents located in the vault.

This is not a troubleshooting guide. If you have any technical issues with SOLIDWORKS, please contact Hawk Ridge Systems technical support.

This document is only to be distributed and used by Hawk Ridge Systems customers. Any other use is prohibited.

HAWK RIDGE SYSTEMS

Contents

2018 PDM Client Installation Guide 1
Before Installation 2
Basic Installation 3
Adding The Vault View 5

Before Installation

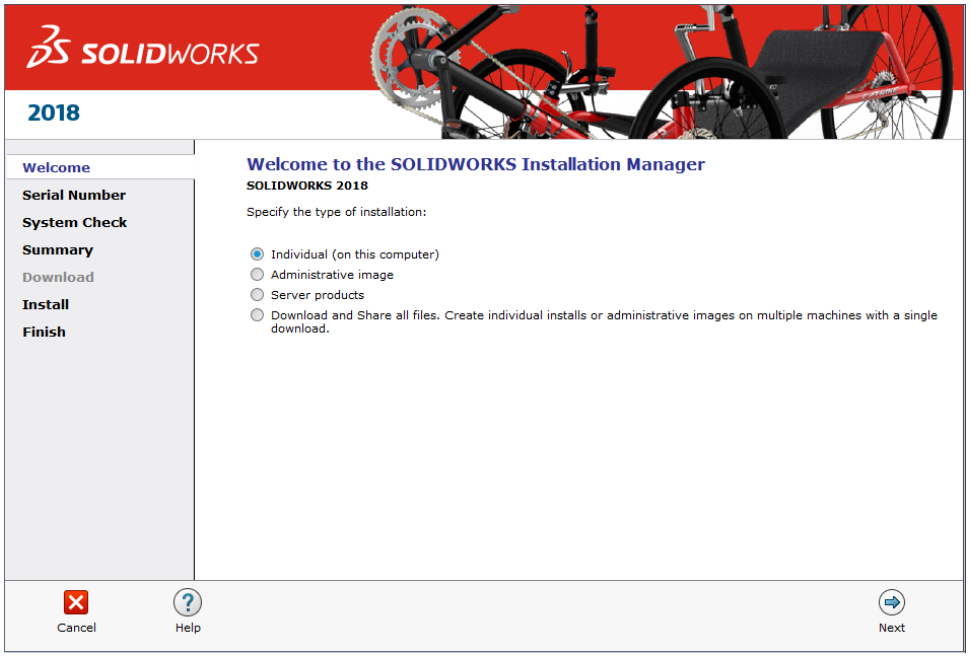
Hawk Ridge Systems highly recommends taking a moment before installing SOLIDWORKS and checking that you are ready to load your new software. First, check links to ensure minimum system requirements and video card compatibility is met. Also, confirm that the hard drive has enough space to have at least 15% free space, after the full installation. Back-up data such as any shared Toolbox library, Design Library, Template files, or a data management vault. As always, verify workmates, customers, or vendors are all on the same version of SOLIDWORKS. Older versions of SOLIDWORKS cannot open files from newer versions.

Starting with PDM 2017 and continuing with PDM 2018, client and server installation must be versions of the same release year. This is a change from previous years, which required that the client and server installation were the same year AND service pack. Verify that the PDM server components are the 2018 version before proceeding with the 2018 PDM client installation.

PDM Client Installation

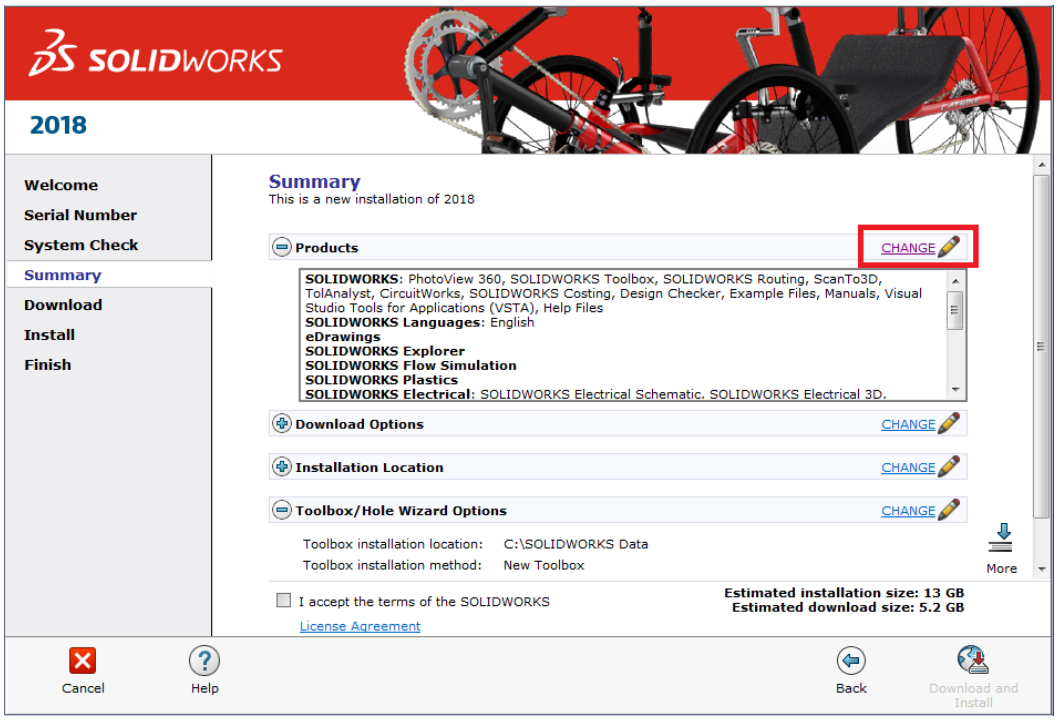
1. From your SOLIDWORKS DVD or full download, double-click on Setup.exe.

2. Specify the "Individual Installation" option in the Installation Manager and press "Next".

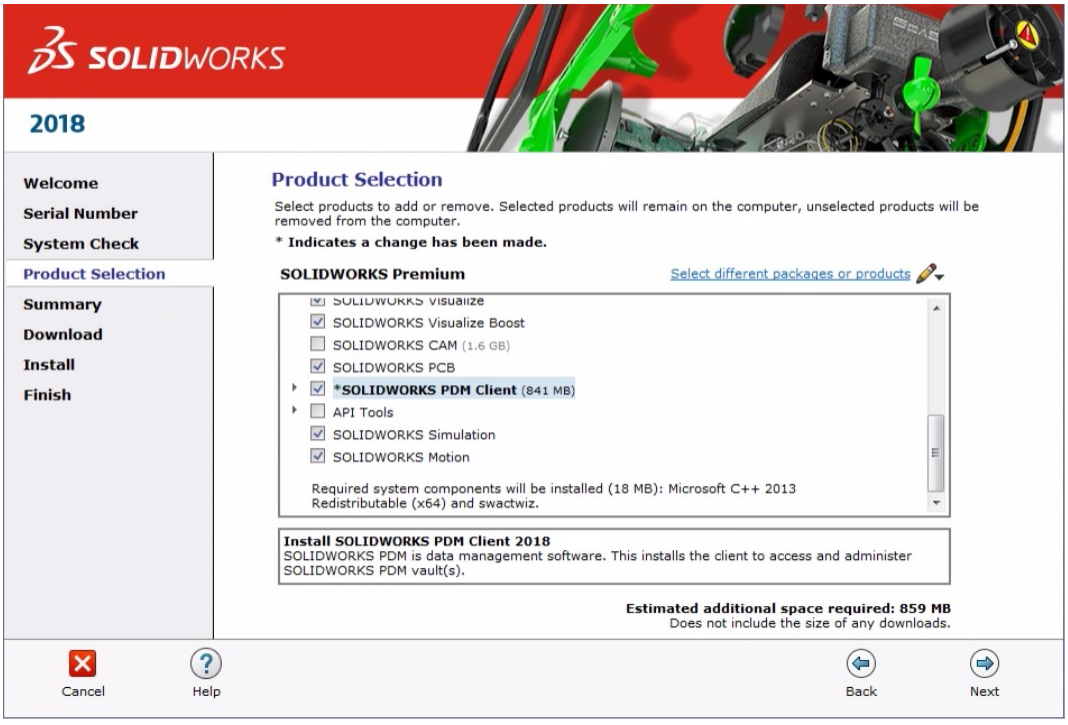


3. Installing the PDM Client does not require a serial number for either PDM Standard or PDM Professional. Press "Next" to continue to the "Summary" page.

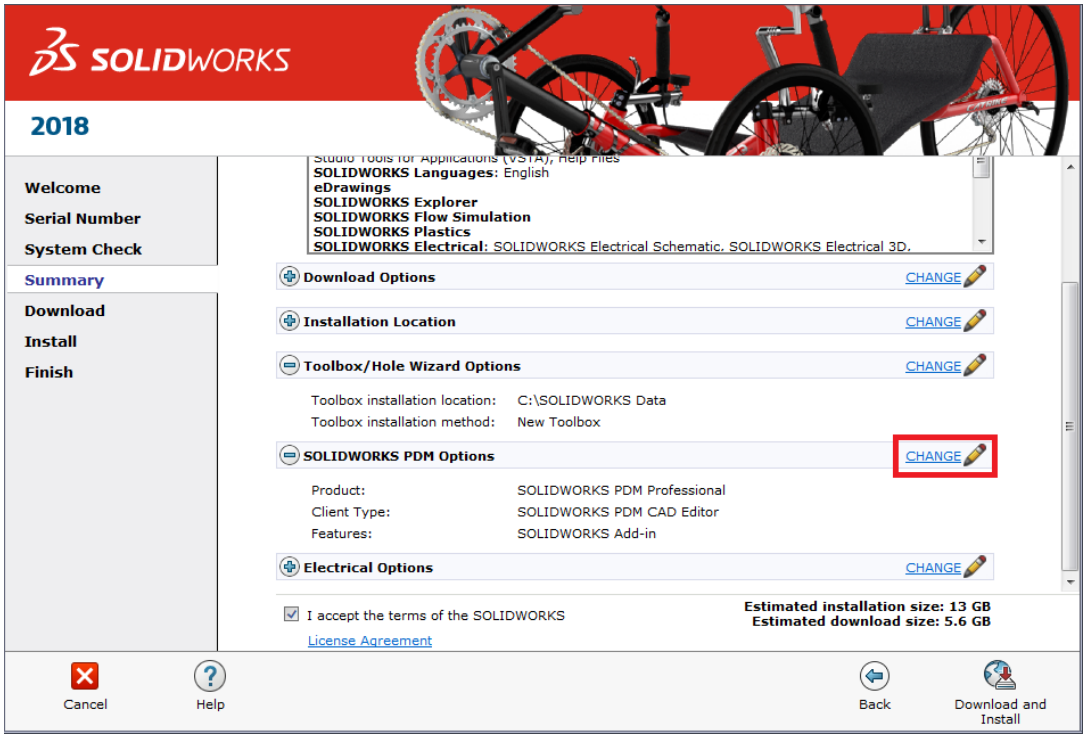
4. On the Summary page, select "Change" next to the "Products" section.



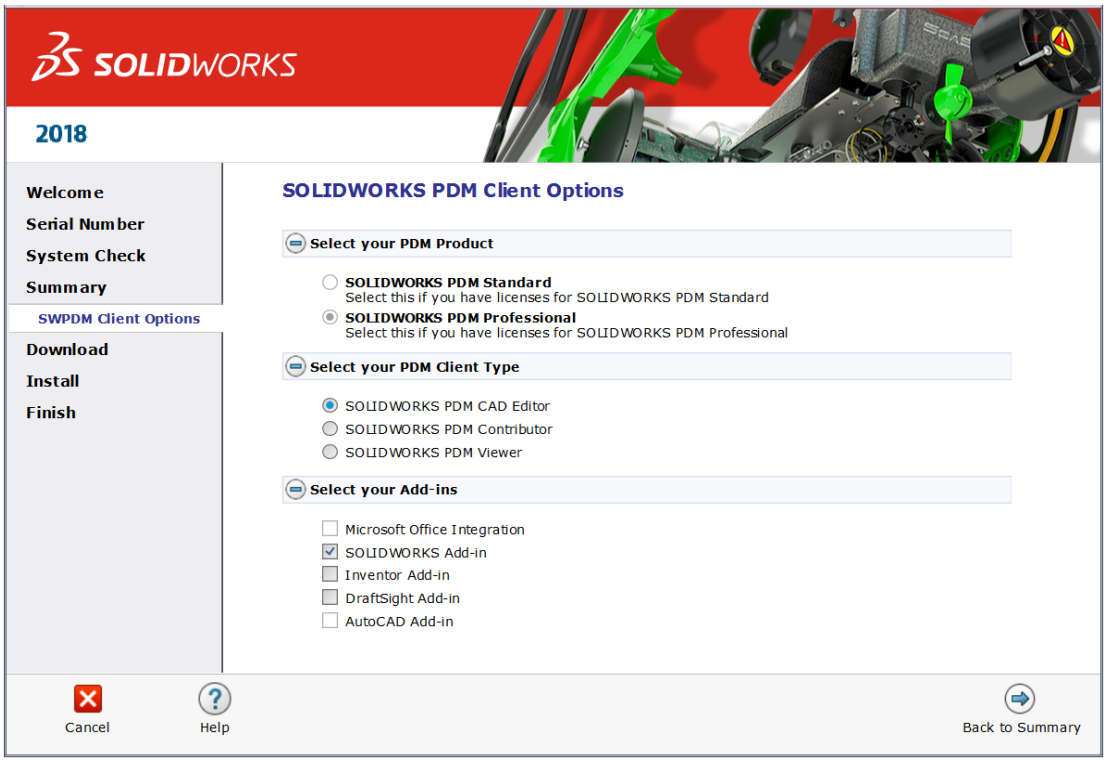
5. Select "PDM Client" from the SOLIDWORKS Products list, and then "Back to Summary". Note that other products may be installed at the same time as the PDM client.



6. Select "Change" next to the "SOLIDWORKS PDM Options" section.



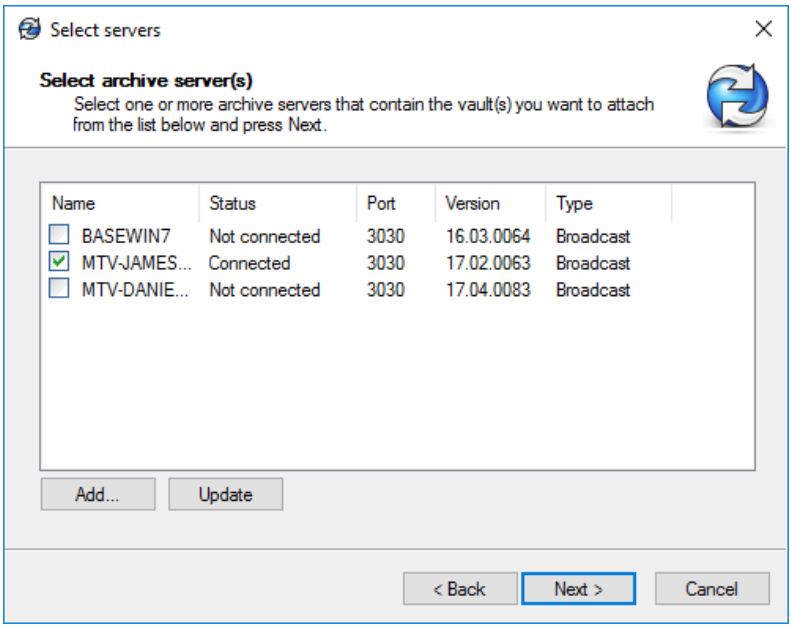
7. Specify whether you would like to install the PDM Standard or PDM Professional Package, the type of client type you would like to install, and any necessary add-ins from the list. Press "Back to Summary".



Adding The Vault View

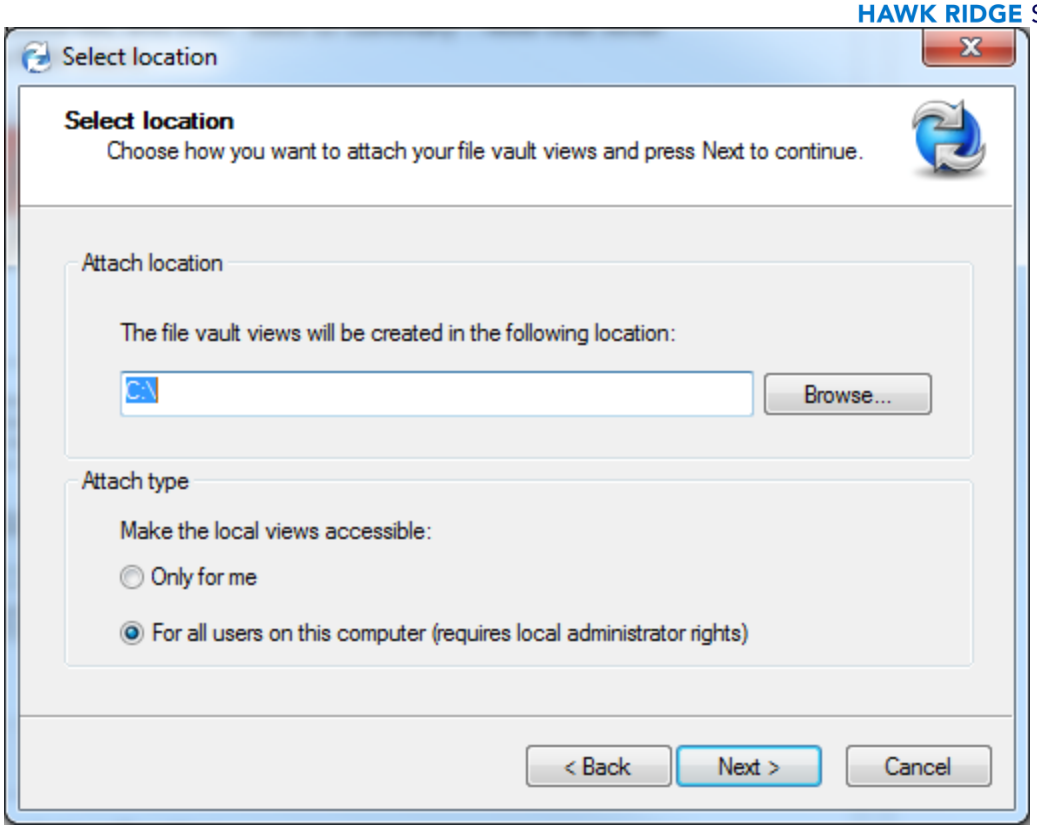
Once the Client component has been installed, a "vault view" will need to be created in order to access the files in the vault. To do this:

1. Go to Start > All Programs > SOLIDWORKS PDM > View Setup
2. Select Next, select the appropriate Archive server, and Next.



Note that if your Archive server is not shown in the list, you may have to manually type it in using the "Add" button. Please see your PDM administrator if you are not sure which server to add.

3. Select your vault and click Next.
4. Specify the location for the vault view, and whether you would like to install the vault view for only your Windows profile, or for all Windows profiles on this computer.
    a. Unless you have different users sharing the same machine, it is usually recommended to select the "For all users" option.
    b. It is recommended to place the vault on or close to the root directory of a drive, to avoid potential issues with file path length.



5. Click Next and then Finish.