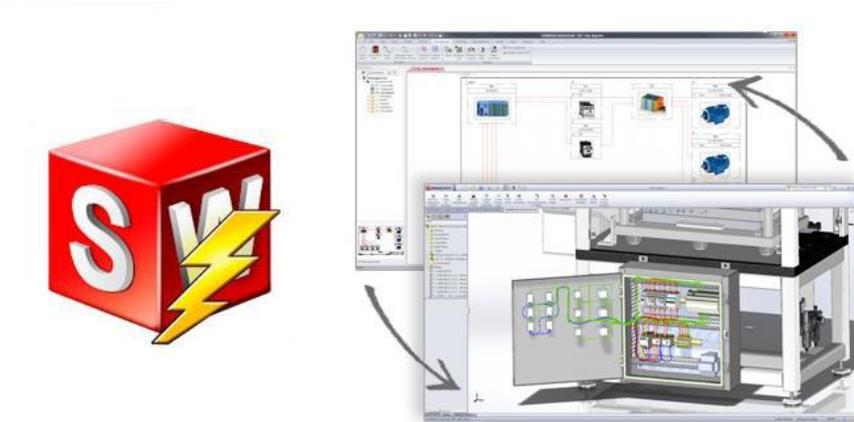


2017 SOLIDWORKS Electrical Client-Server Upgrade Guide



This guide gives instructions for upgrading SOLIDWORKS Electrical 2017. It is written for client-server installations of SOLIDWORKS Electrical. In this configuration, a server computer hosts the program data, collaborative server and SQL server, while each client computer hosts the user application. If your software is installed in a standalone configuration (all program components on the same computer), please refer to the **2017 SOLIDWORKS Electrical Standalone Upgrade Guide** (available in our [Help Center](#)). Please contact [Hawk Ridge Systems Technical Support](#) if you are unsure of your SOLIDWORKS Electrical configuration type.

SOLIDWORKS Electrical 2017 uses the same installation manager as other SOLIDWORKS products, including the 3D CAD software. If upgrading other SOLIDWORKS products along with Electrical, please also refer to their upgrade guides for further instructions.

This is not a troubleshooting guide. Please visit our [Help Center](#) or contact [Hawk Ridge Systems Technical Support](#) if you have any technical issues with SOLIDWORKS Electrical.

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Before Upgrading

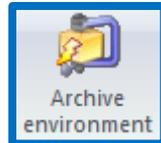
Hawk Ridge Systems highly recommends checking your system before upgrading SOLIDWORKS Electrical 2017. Follow these steps to ensure you are ready to upgrade.

1. Check operating system and hardware compatibility.
 - Check that your computer meets the SOLIDWORKS [system requirements](#).
 - Make sure you are using the recommended [graphics card driver](#).
 - Ensure you are using the latest version of your operating system. Check for and install any Windows updates before upgrading SOLIDWORKS Electrical.
 - Supported operating systems: Windows 7 SP1, Windows 8.1, Windows 10.
 - Windows Home Editions and Windows To Go are not supported.
 - Note that SOLIDWORKS Electrical 2017 is only supported on 64-bit operating systems.

2. Confirm your community's working version.
 - SOLIDWORKS Electrical is not backwards compatible, meaning older versions cannot use program data from newer versions. Ensure that colleagues, customers and vendors with whom you share files are all on the same version to which you are upgrading.
 - You can only have one version of SOLIDWORKS Electrical installed on a single computer, so any previous versions will be uninstalled.
 - In the client-server configuration, all installations must be running the same major year version of SOLIDWORKS Electrical. A future version server installation will not be accessible to a client installation of an earlier version.

3. Back-up your data.

- It is strongly recommended that you **archive your environment** prior to performing any upgrade or maintenance of SOLIDWORKS Electrical. This will save a copy of all your program data (projects, components, symbols, etc.) into one compressed file. To do this, click the **Archive Environment** button within the SOLIDWORKS Electrical application and run through the wizard. Note that the archive may take several hours to create, so we recommend running this process overnight.



- If you have related SOLIDWORKS files, it is recommended that you make backup copies of these also. Any templates or design libraries should also be saved to a backup folder.

4. Obtain your SOLIDWORKS 2017 installation media.

- The latest version of the SOLIDWORKS Installation Manager can be downloaded from the [SOLIDWORKS Customer Portal](#). If you do not have a Customer Portal account, please refer to our guide titled **2017 Product Registration** to create and register one.
- The Installation Manager can be used to download the necessary files and complete the upgrade in one process.
- The Installation Manager can also be used to download the full SOLIDWORKS 2017 installation files ahead of the upgrade. This complete file set is approximately 12 GB and is equivalent to the DVDs. This is useful if SOLIDWORKS Electrical is being upgraded on several computers, as the files can be downloaded once then copied to those computers via the network or a removable storage device.
- You can also use the SOLIDWORKS 2017 DVDs, if available.

Licensing

SOLIDWORKS Electrical can be used with standalone and network licenses. Note that the license type differs from the installation configuration, which can be standalone or client-server (this guide is for the client-server configuration). Either license type can be used with either configuration.

If you have a standalone license, you will need to activate SOLIDWORKS Electrical after upgrading. You will be automatically prompted to do this when launching the application after an upgrade. If you are upgrading SOLIDWORKS at the same time as SOLIDWORKS Electrical, you will need to launch SOLIDWORKS to complete the activation. Refer to our guide titled **2017 Product Activation** for more information on activation methods. You may also deactivate a standalone license on a particular computer by following the steps in the [Appendix](#). This will allow the license to be activated on another computer.

If you have a network license, the SolidNetWork License Manager on the license server computer needs to be of a version at or above the version of SOLIDWORKS Electrical to which you are upgrading. If this is not already the case, refer to our guide titled **2017 Network Server Installation** to install and activate a suitable version of the SolidNetWork License Manager.

Configuration Requirements

SOLIDWORKS Electrical 2017 includes Microsoft SQL Server 2014 Express in the installation.

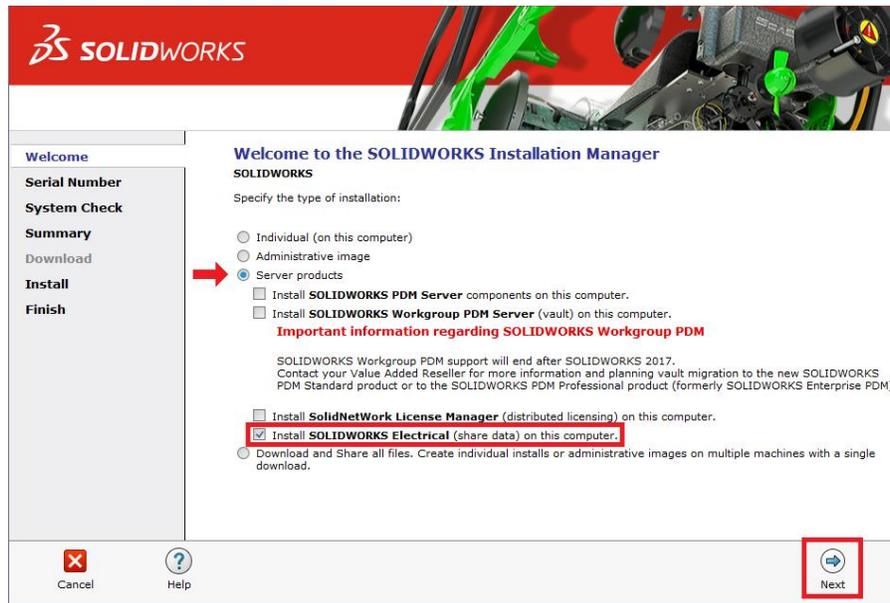
If you are upgrading SOLIDWORKS Electrical 3D, you must either upgrade SOLIDWORKS along with Electrical 3D or have already upgraded SOLIDWORKS on your computer. SOLIDWORKS, SOLIDWORKS Electrical Schematic and SOLIWORDS Electrical 3D must all be of the same version and service pack.

The client and server components of SOLIDWORKS Electrical in the client-server configuration will need to be in continuous communication over the network. Please refer to our guide title **Network Communication Ports in SOLIDWORKS Electrical** for more information on the network requirements.

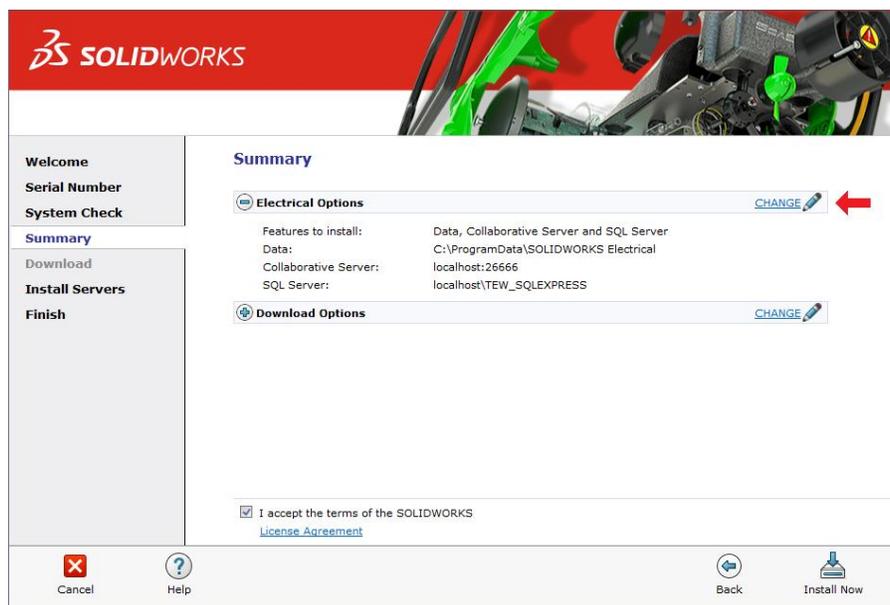
Server Upgrade

REMINDER: We strongly recommend archiving your environment before proceeding with this upgrade.

1. Close the SOLIDWORKS Electrical application on all client computers to ensure no users are connected to the server.
2. Log into the server computer as an administrator.
3. Disable all anti-virus and anti-spyware tools and turn off Windows User Account Control.
4. Once all client applications are closed, stop the collaborative server service on the server computer. This will be named **SOLIDWORKS Electrical Collaborative Server** in the Windows Services tool.
5. Locate your SOLIDWORKS 2017 installation media (download or DVD) and launch the setup application (setup.exe). You should see the Welcome screen for the SOLIDWORKS Installation Manager. Select **Install SOLIDWORKS Electrical (share data) on this computer** under **Server products** then click **Next**.

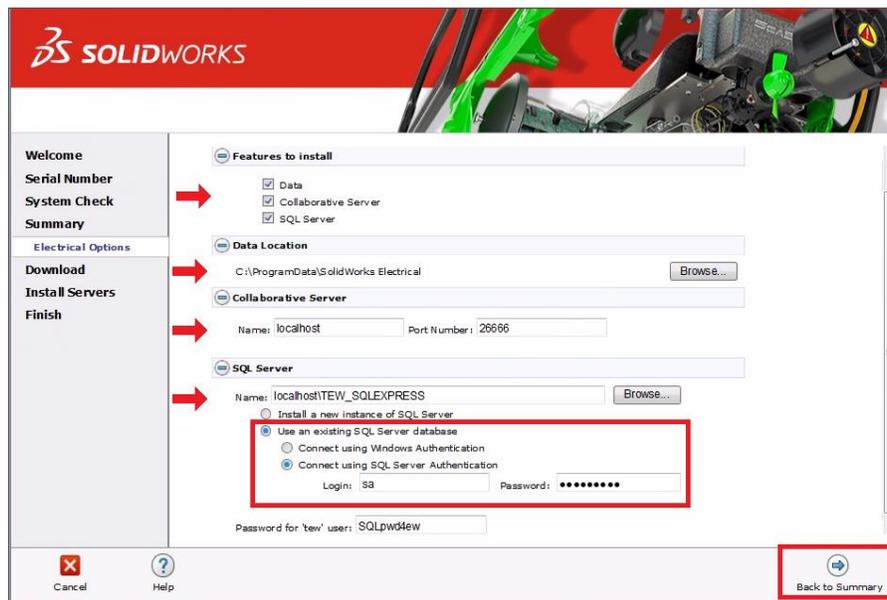


- The Installation Manager will perform an automatic system check for any existing versions of SOLIDWORKS or SOLIDWORKS Electrical. Take note of any messages or warnings during this step then click **Next**.
- You will then see the Summary screen with details of the **Electrical Options**. Click **Change** to edit these options.



- Check the following options then click **Back to Summary** when finished.
 - Features to install** should all be checked on.

- **Data Location** specifies the directory that contains all of the program data. The default is C:\ProgramData\SOLIDWORKS Electrical. This should be the same as the existing directory used for your program data. If it is not already, click Browse to point this to the correct location.
- **Collaborative Server** specifies the machine name and port number of the collaborative server. The defaults are localhost and 26666, respectively. These settings should correspond to those for your existing installation.
- **SQL Server** specifies the name of the SQL server (the default is localhost\TEW_SQLEXPRESS) that hosts the Electrical databases and the password that is used to connect to it. Check that the SQL server name correctly matches the existing SQL server on the computer. If it is incorrect, click **Browse** to find and select the correct SQL server then make sure that **Use an existing SQL Server database** is selected.
- For an upgrade, we recommend changing the authentication type to **Connect using SQL Server Authentication** to prevent any permissions issues from affecting the upgrade. Make the login **sa** and use the appropriate password. This will be **SQLpwd4ew** unless explicitly changed by the administrator during the original installation.



9. Confirm that all the information on the Summary screen is correct. Accept the license agreement then click **Install Now** to begin the upgrade.
10. When the upgrade is complete, you will be asked to join the [SOLIDWORKS Customer Experience Improvement Program](#). We recommend joining this, as it provides software performance information to SOLIDWORKS and enables the use of the CAD Admin Dashboard through the Customer Portal. The information this sends to SOLIDWORKS is treated confidentially and does not result in the transfer of any file information. After making the selection, click the **Finish** button to complete the upgrade.

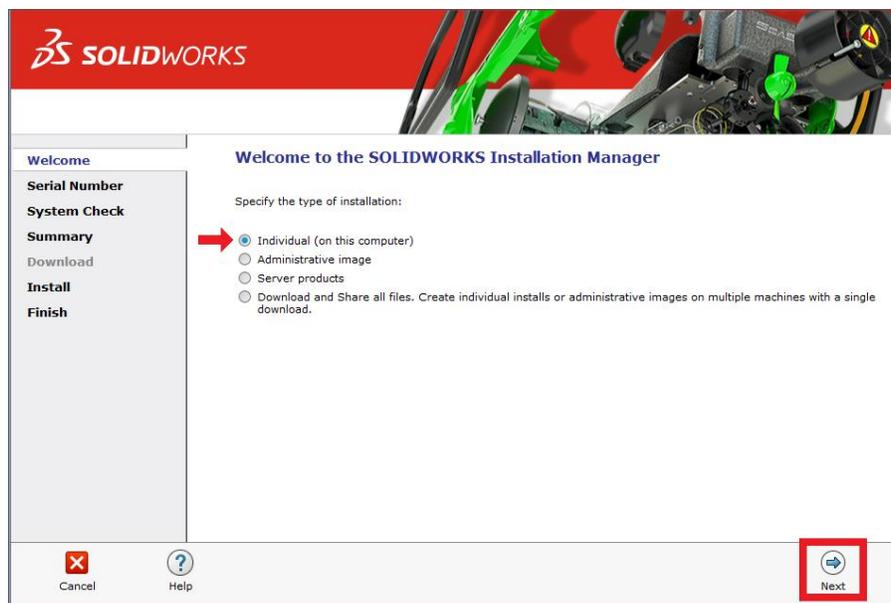


11. Reboot the server computer. Check Windows Services and start the SOLIDWORKS Electrical Collaborative Server service if it is not already started.

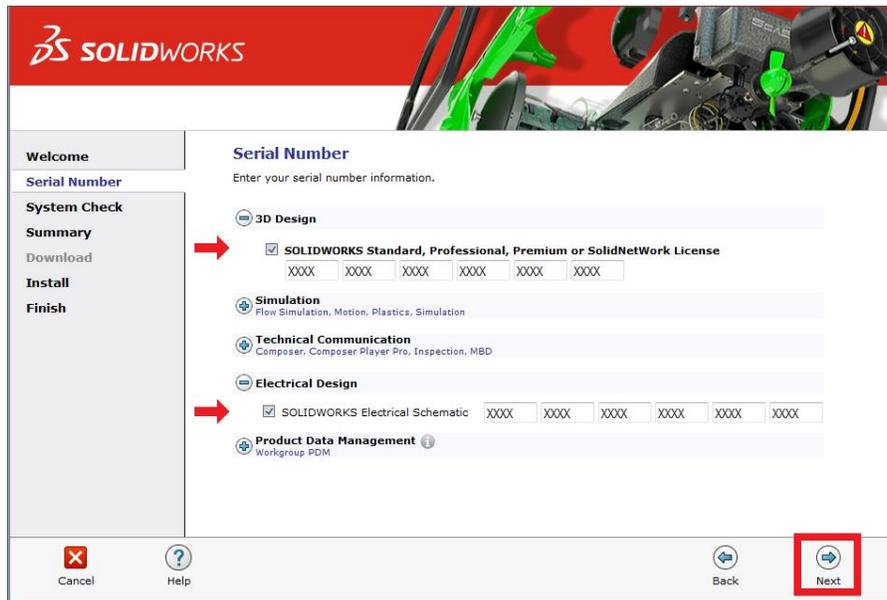
Client Upgrade

IMPORTANT: The SOLIDWORKS Electrical server upgrade should be completed before the client upgrade.

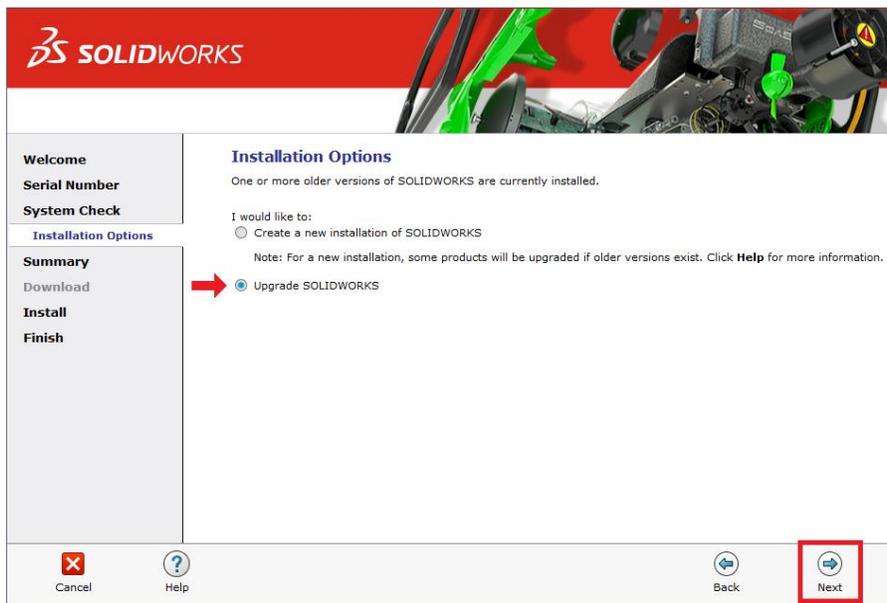
1. Log into the computer as an administrator.
2. Disable all anti-virus and anti-spyware tools and turn off Windows User Account Control.
3. Locate your SOLIDWORKS 2017 installation media (download or DVD) and launch the setup application (setup.exe). You should see the Welcome screen for the SOLIDWORKS Installation Manager. Select **Individual (on this computer)** then click **Next**.



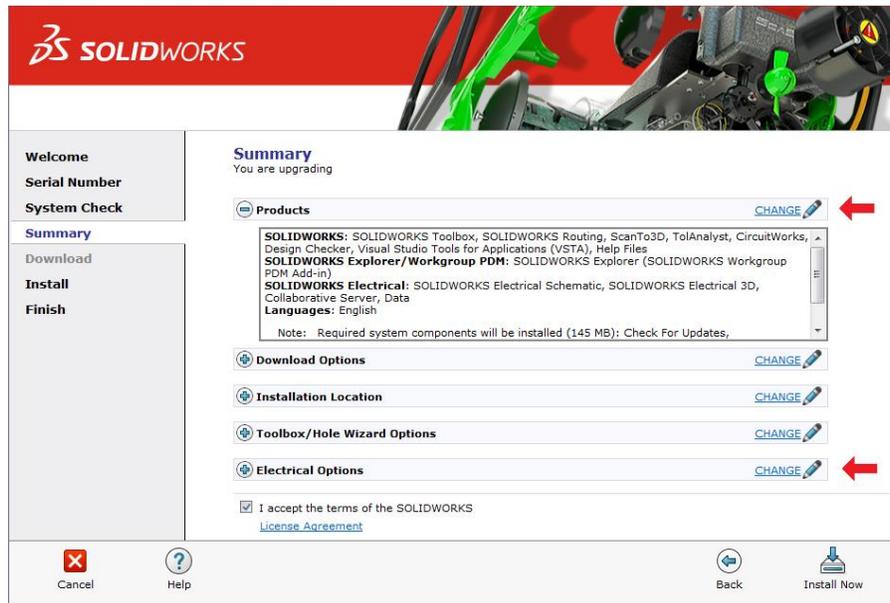
4. You will then see the Serial Number screen. This should already contain your existing SOLIDWORKS licenses. Note that you do not need to enter multiple serial numbers if your SOLIDWORKS serial number is the same as your SOLIDWORKS Electrical serial number. If you are only upgrading the SOLIDWORKS Electrical Schematic application, the serial number should be entered in the corresponding field. Click **Next**.



5. The Installation Manager will verify your serial number and perform an automatic system check for any existing versions of SOLIDWORKS or SOLIDWORKS Electrical. Take note of any messages or warnings during this step then click **Next**.
6. If upgrading from one major version to another (e.g. 2016 to 2017), the Installation Options screen may give you the option to create a new installation. Because multiple versions of SOLIDWORKS Electrical cannot be installed on the same computer, select **Upgrade SOLIDWORKS**.

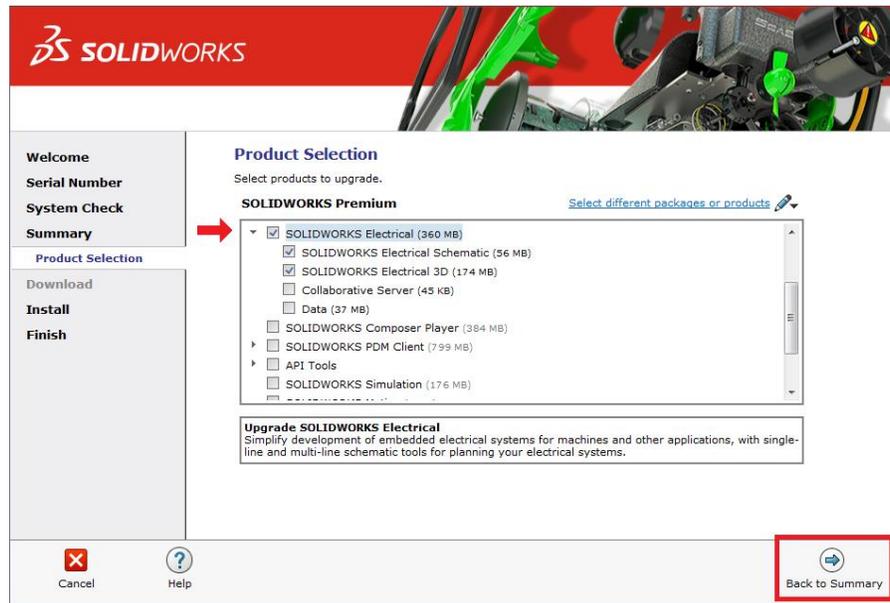


7. At the Summary screen, you can change the settings and options defined for the upgrade. To do so, click **Change** on the right side of each option.



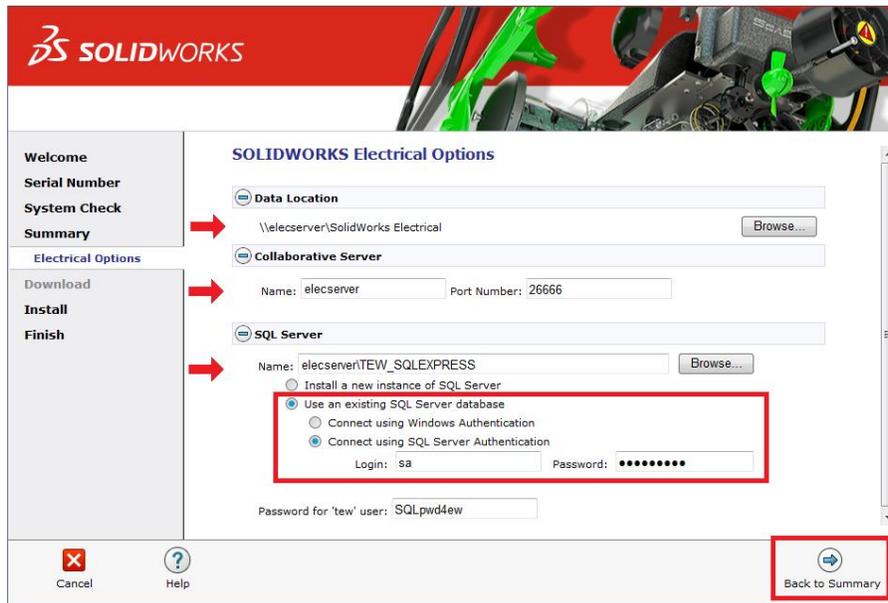
8. Click **Change** next to Products to go to the Product Selection screen. Scroll down and ensure that SOLIDWORKS Electrical is checked on. Nested here are the individual Electrical components. Check these against the information below. Click **Back to Summary** when finished.

- **SOLIDWORKS Electrical Schematic** is the 2D electrical schematic design application and should be checked on.
- **SOLIDWORKS Electrical 3D** is the add-in for the main SOLIDWORKS application. It may not be available if your license does not include it, but if it does, ensure that you are installing SOLIDWORKS as well. They must be of the same version and service pack.
- **Collaborative Server** is used to communicate between the application and the SQL server. This option should be checked off for a client upgrade.
- **Data** includes the SQL server and program data used for the application (projects, symbols, manufacturer parts, templates, etc.). This option should be checked off for a client upgrade.



9. At the Summary screen, click **Change** next to Electrical Options. Check the following options and click **Back to Summary** when finished.

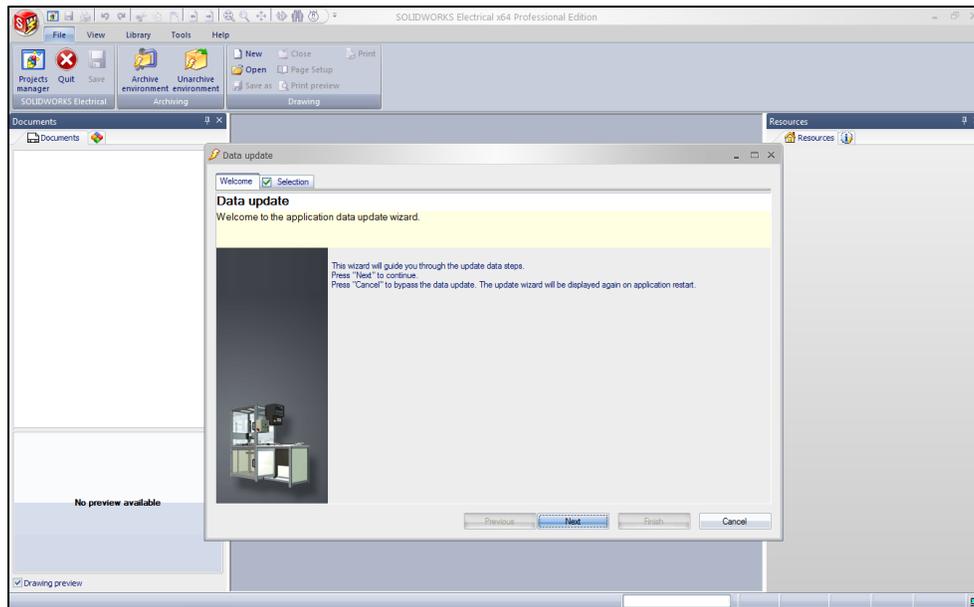
- **Data Location** specifies the directory that contains all of the program data. It should be consistent with the directory that was used for the server upgrade. If it is not already, click **Browse** to point this to the shared directory (e.g. \\elecserver\SOLIDWORKS Electrical).
- **Collaborative Server** specifies the machine name and port number of the collaborative server. It should show the name of the server computer (e.g. elecserver) and the port number of the collaborative server (26666 by default).
- **SQL Server** specifies the name of the SQL server that hosts the Electrical databases and the password that is used to connect to it. It should show the name of the SQL server on the server computer (e.g. elecserver\TEW_SQLEXPRESS). If it is incorrect, click **Browse** to find and select the correct SQL server then make sure that **Use an existing SQL Server database** is selected.
- We recommend changing the authentication type to **Connect using SQL Server Authentication** to prevent any permissions issues from affecting the upgrade. Make the login **sa** and use the appropriate password. This will be **SQLpwd4ew** unless explicitly changed by the administrator during the original server installation.



10. In the Download Options, we recommend disabling the Background Downloader, as it is known to cause issues. Click **Change** next to Download Options, then deselect **Use the background downloader** if not already deselected. Click **Back to Summary** when finished.
11. Confirm that all the information on the Summary screen is correct. Accept the license agreement then click **Install Now** to begin the upgrade.
12. When the upgrade is complete, you will be asked to join the [SOLIDWORKS Customer Experience Improvement Program](#). We recommend joining this, as it provides software performance information to SOLIDWORKS and enables the use of the CAD Admin Dashboard through the Customer Portal. The information this sends to SOLIDWORKS is treated confidentially and does not result in the transfer of any file information. After making the selection, click the **Finish** button to complete the upgrade.



13. When the software is launched for the first time after the upgrade, you may need to activate the license (if using standalone licensing). Follow the prompts to complete this. You will also be prompted to accept the license agreement.
14. Finally, you will be prompted to update the program data for this version of SOLIDWORKS Electrical. Proceed through this wizard to complete the installation and begin using the software.



Appendix: License Deactivation

Each activation transaction is coded to the hardware of your computer. If you are moving your SOLIDWORKS Electrical installation to a new computer, you will need to deactivate your license activation before activating on the new computer. You should also do this before reformatting or replacing your hard drive or operating system. If your SOLIDWORKS Electrical license is tied to your main SOLIDWORKS license (i.e. they are the same number), please see our guide titled **2017 Product Activation** for the deactivation process.

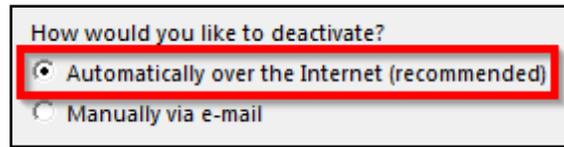
If your computer does not have internet access, refer to the E-mail Deactivation section of this document below.

Online Deactivation

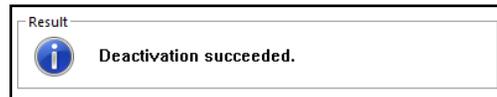
1. Go to Start > All Programs > SOLIDWORKS 2017 > SOLIDWORKS Electrical.
2. Once SOLIDWORKS Electrical launches, click **Help > Deactivate License**.



3. Choose to deactivate **Automatically over the Internet**, enter your e-mail address, then click **Next**.



- The software will connect to the SOLIDWORKS activation servers and you will be informed when the license has been successfully deactivated.



- Press the **Finish** button to complete the process.

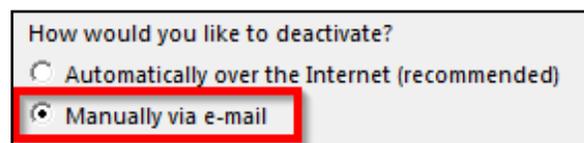
Note: SOLIDWORKS Electrical will no longer run on this computer unless it is re-activated.

E-mail Deactivation

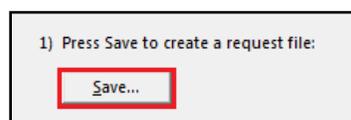
- Go to Start > All Programs > SOLIDWORKS 2017 > SOLIDWORKS Electrical.
- Once SOLIDWORKS Electrical launches, click **Help > Deactivate License**.



- Choose to activate **Manually via e-mail**, enter your e-mail address, then click **Next**.



- On the next page, press the **Save** button to create an activation request file.



Note: Once you have saved this file, your activation is disabled. Do not exit the activation window until you have read in the response file from SOLIDWORKS and completed the process or you will not be able to run SOLIDWORKS Electrical to complete the deactivation.

- Browse to a location on your computer to store this .txt file and press the **Save** button. Copy this .txt file onto a removable storage device and take it to a computer with internet access.



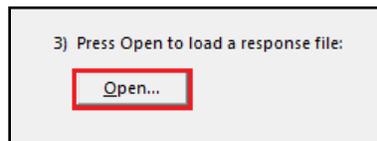
- E-mail this file as an attachment to activation@solidworks.com, leaving the subject and message body blank.



- SOLIDWORKS will send a return e-mail with a different .txt file attached. Save this file to a removable storage device and take it back to the computer awaiting the activation deactivation.



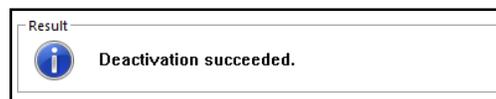
- In the activation wizard dialog, press the **Open** button.



- Browse to the response file then press the **Open** button.



- The next page will show you that your deactivation is complete.



- Press the **Finish** button to complete the process.

Note: SOLIDWORKS Electrical will no longer run on this computer unless it is re-activated.