

2016 Workgroup PDM Client Installation

TITLE:	2016 Workgroup PDM Client Installation
DATE:	09/15/2015
SUBJECT:	Installation of 2016 Workgroup PDM Clients
ABSTRACT:	Comprehensive installation guide of 2016 SOLIDWORKS Workgroup PDM Clients.



This guide is written for version 2016. If you are using an earlier version of SOLIDWORKS please download our earlier installation documents to correctly load and administer your version of SOLIDWORKS.

SOLIDWORKS Workgroup PDM is used to manage design documents. A "vault" is a windows directory set up on a server that will store design data generated by your company. The software used to control this data runs as a service on your **Windows Server 2008R2, Windows Server 2012, Windows 7, or Windows 8 64-bit server**.

This document covers loading the **Client** programs used to access the SOLIDWORKS Workgroup PDM Vault. Please be sure you have the vault installed and running on your server before installing the client. The users must have access to a server running the Vault service to manage data.

Files in the vault directory should **NEVER** be altered manually. Administrators must use the SOLIDWORKS **Workgroup PDM VaultAdmin** program to control the permissions and projects. Users must use any one of the vault client programs to add files or manage properties. See our SOLIDWORKS Workgroup PDM vault installation guide if you have not created a vault yet.

This is not a troubleshooting guide if you have any technical issues with SOLIDWORKS please contact [Hawk Ridge Systems technical support](http://www.hawkridgesys.com/technical-support).

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SOLIDWORKS Workgroup PDM

SOLIDWORKS Workgroup is a suite of Software Products that include:

Workgroup PDM Vault

	SOLIDWORKS Workgroup PDM VaultAdmin Program
	SOLIDWORKS Workgroup PDM Vault Windows Service

A vault must be located on a shared Windows Server 2008R2, Windows Server 2012, Windows 7, or Windows 8 64-bit server. The server computer must be on and the users must have access to the vault data directory for correct document management.

Workgroup PDM Clients

	SOLIDWORKS Workgroup PDM Client Add - In
	SOLIDWORKS Explorer with Client Or Contributor Add-In
	SOLIDWORKS Workgroup PDM Viewer License

Workgroup PDM client programs are how users access the vault. Each user, regardless of client style, must have access to the machine running the vault service in order to access any data.

SOLIDWORKS Workgroup PDM Client add-in for SOLIDWORKS allows users full access to input, manage, change and maintain SOLIDWORKS files in the vault. **This is for all SOLIDWORKS users.** *SOLIDWORKS Professional and SOLIDWORKS Premium both include the client add-in.*

SOLIDWORKS Workgroup PDM Contributor add-in allows users to manage data, change properties and attach non-SOLIDWORKS files. **This is for non-SOLIDWORKS users.**

The contributor is purchased separately and can be licensed standalone or run from a SolidNetWork License Manager.

SOLIDWORKS Workgroup PDM Viewer allows read-only web access to the vault. **This is for viewing and printing only. This has no access to make changes.**

The viewer portal is loaded on to the vault server and uses Microsoft Internet Information Services (IIS) as the host. The client is purchased in bundles of 5 and uses Internet Explorer to access the service.

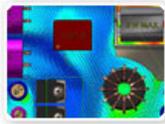
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Before Installation

Hawk Ridge highly recommends taking a moment before installing SOLIDWORKS and check that you are ready to load your new software. Follow these steps to have better performance within SOLIDWORKS:

1. Check hardware compatibility
 - Log in to www.SOLIDWORKS.com, click the Login link at the top of the page and log into the customer portal. In the self service area there are links to check [video card](#) compatibility as well as minimum [system requirements](#).

System Requirements

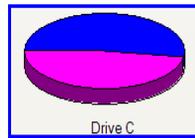


Research graphics cards, system requirements for SolidWorks products, and other hardware related topics.

- You can also see Hawk Ridge Systems recommended hardware by logging in to <http://support.hawkridgesys.com/> and reviewing our [hardware recommendations](#) you can see brand name makes and models we suggest for best performance. We also have a more [comprehensive hardware guide](#) that discusses all types of considerations for your system.
2. Check Operating System Compatibility
 - Here is a check list of compatible operating systems for this version of SOLIDWORKS; you can find the latest version of this under the [system requirements](#) page of www.SOLIDWORKS.com after you login.

Operating Systems	2014	2015	2016
Windows 7 (64-bit)	✓	✓	✓
Windows 7 (32-bit)	✓	✗	✗
Windows 8.1 (64-bit only)	✓ (2014 SP1)	✓	✓
Windows 8.0 (64-bit only)	✓	✓	✗
Hardware			
RAM	2 GB or more recommended		
Disk Space	5 GB or more		
Processor	Intel or AMD with SSE2 support. 64-bit operating system recommended		
Other			
Internet Explorer	IE 8,9,10	IE 9,10,11	IE 9,10,11
Virtual environments	Not Supported		

- Be sure you are on the latest version of your operating system and install any Windows updates before installing SOLIDWORKS.
 - *Windows Server 2008 (R2), Windows Server 2012, Windows 7 Professional & Windows 7 Ultimate, Windows 8 64-bit* are all supported platforms. *Windows XP, Vista, Windows 7 Starter & Windows 7 Home Premium, Windows 8 32-bit* are not supported.
3. Check hard drive for space and overhead.
- In Windows Explorer go, to Computer and check destination drive (by default the **C drive**), right-click this drive and choose **Properties** to see it has the 7 GB free required for the full program (not including SIMULATION or PDM add-ins).
 - Also be sure this drive has at least **15%** free space. A full disk may cause out-of-memory crashes and cannot be defragged to optimize performance.



4. Confirm community's working version.
- SOLIDWORKS is not backwards compatible, meaning older versions cannot open files from newer versions. Be sure workmates, customers or vendors are all on the same version you are loading (i.e. SOLIDWORKS 2015 or SOLIDWORKS 2016).



5. Back up your data.
- Ask a system administrator or existing user to see if there are any shared libraries, such as Toolbox or a data management vault. Toolbox libraries and PDM vault information should all be saved to back-up locations. Then you can migrate the original libraries and vault to the newer version.
 - If you have a shared location containing existing SOLIDWORKS files, it is recommended that you make backup copies of these files. Any templates or design libraries should also be saved to a backup folder.



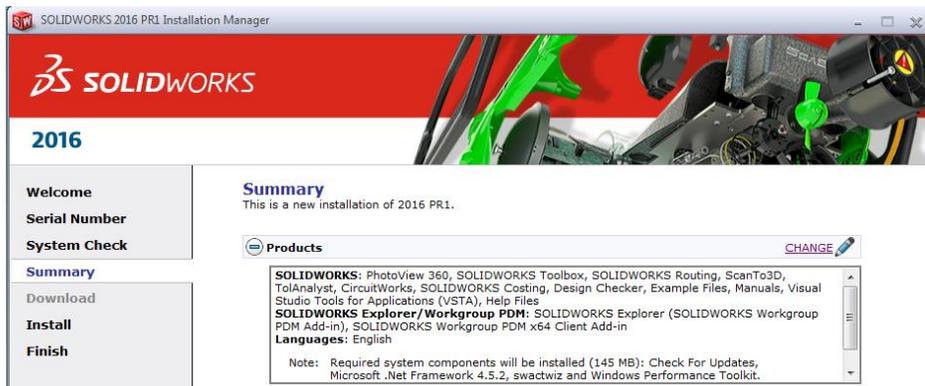
6. Uninstall previous version of SOLIDWORKS.
- It is recommended that after you have saved out all shared data you should fully uninstall any previous versions of SOLIDWORKS from your machine. After fully uninstalling SOLIDWORKS and its add-ins, you should install the new software.



Load SOLIDWORKS Client

By default, when loading SOLIDWORKS Professional or SOLIDWORKS Premium, the Workgroup PDM client will be loaded with SOLIDWORKS and SOLIDWORKS Explorer.

SOLIDWORKS Workgroup PDM client is loaded using the same steps as a typical standalone or network seat; see our documents on this type of installation. If SOLIDWORKS is already loaded, you can modify your installation. Again, see our modify install document for this procedure. When the SOLIDWORKS installation manager gets to the summary page where it displays the products that are going to load, click the **CHANGE** link to edit what will be loaded on this machine.



According to your serial number, the products you have access to load will be selected for installation automatically. If you have loaded SOLIDWORKS Premium or SOLIDWORKS Professional, the Workgroup PDM client will have already loaded. Check to make sure all items are checked.

- ▶ SOLIDWORKS (4.8 GB)
- ▶ eDrawings (319 MB)
- ▼ SOLIDWORKS Explorer/Workgroup PDM (777 MB)
 - ▶ SOLIDWORKS Explorer (361 MB)
 - SOLIDWORKS Workgroup PDM VaultAdmin (41 MB)
 - SOLIDWORKS Workgroup PDM x64 Client Add-in (291 MB)

If you are upgrading to include Workgroup PDM, you will want to expand the **SOLIDWORKS Explorer/Workgroup PDM** group to see all the products you can install on the client.

You will want to install the **SOLIDWORKS Workgroup PDM VaultAdmin** if you want the user to have administrative access to the vault.

The instructions for installing these client components manually are also in this guide.

If you have a SOLIDWORKS Workgroup PDM Contributor License, or would like to load a vault admin on a machine along with your SOLIDWORKS Workgroup PDM, you will want to follow the instructions for loading SOLIDWORKS explorer.

If you have SOLIDWORKS Workgroup PDM Viewer, please see the sections regarding PDM Viewer Installation and Viewer Client Installation.

Loading Workgroup Clients

The SOLIDWORKS Explorer program is a basic file management tool that comes with all versions of SOLIDWORKS. When installing the SOLIDWORKS Explorer you can also load these components:

- SOLIDWORKS Explorer (with SOLIDWORKS Workgroup PDM Contributor)
- SOLIDWORKS Workgroup PDM Client Add-In (for SOLIDWORKS)
- SOLIDWORKS Workgroup PDM VaultAdmin

SOLIDWORKS Explorer and the Client Add-Ins will automatically load on a machine with SOLIDWORKS Professional or SOLIDWORKS Premium.

Follow these instructions to:

- Load the SOLIDWORKS Workgroup PDM Contributor on a machine without SOLIDWORKS.
 - Load the SOLIDWORKS Workgroup PDM client on a machine that only has basic SOLIDWORKS.
 - Load the SOLIDWORKS Workgroup PDM VaultAdmin on to any machine you wish to use for administrative access to the Workgroup PDM vault.
1. Insert your DVD or start the sldim.exe from a download. On the welcome page, for the Installation type, choose the **Individual** (choose **Modify** if you already have SOLIDWORKS loaded on this machine).

Welcome to the SOLIDWORKS Installation Manager

SOLIDWORKS 2016 PR1

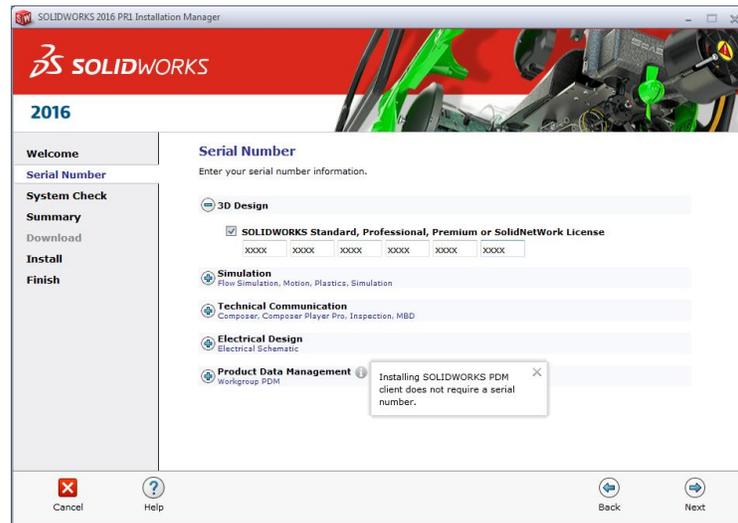
Specify the type of installation:

- Individual (on this computer)
- Administrative image
- Server products
- Download and Share all files. Create individual installs or administrative images on multiple machines with a single download.

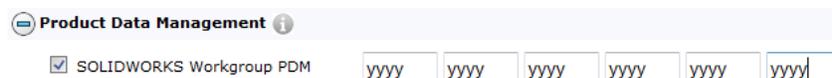
2. Press the **Next** button to continue.



3. Enter your SOLIDWORKS Professional or SOLIDWORKS Premium serial number on the following page.



If you purchased PDMWorks without either one of these versions of SOLIDWORKS press the **If you have other serial numbers from SOLIDWORKS Corporation enter them here** link. Then enter your SOLIDWORKS Workgroup PDM serial number.



These may appear already, being read out of the registry of your current vault if upgrading.

Your serial number and installation will be verified at this time.

4. Press the **Next** Button to continue.



5. If this is a new version of 2016, you will be taken to a summary page showing the products you will install. Click the **Change** link to the upper right of the product list to be taken to the product selection page.

If this is a modification of an existing installation, you will be automatically taken to a product selection page.

If you are loading on the server and only need to load the SOLIDWORKS Workgroup PDM VaultAdmin component, you can de-select all other SOLIDWORKS programs.

- ▼ SOLIDWORKS Explorer/Workgroup PDM (126 MB)
 - ▼ SOLIDWORKS Explorer (361 MB)
 - SOLIDWORKS Workgroup PDM Add-in (1 KB)
 - SOLIDWORKS Workgroup PDM VaultAdmin (41 MB)
 - SOLIDWORKS Workgroup PDM x64 Client Add-in (291 MB)

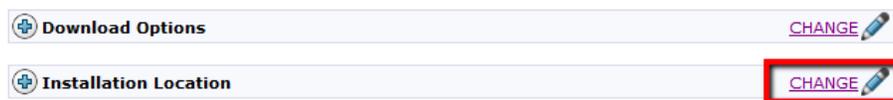
If you are loading a client, you can load SOLIDWORKS Explorer along with the SOLIDWORKS Workgroup PDM Client Add-in (x64 Client if you have a 64-bit system) when loading SOLIDWORKS or you can modify the existing SOLIDWORKS to install this add-in. If you are loading onto a computer that will be using a Contributor license, uncheck the **SOLIDWORKS Workgroup PDM Client Add-in** to only install SOLIDWORKS Explorer.

- ▼ SOLIDWORKS Explorer/Workgroup PDM (445 MB)
 - ▼ SOLIDWORKS Explorer (361 MB)
 - SOLIDWORKS Workgroup PDM Add-in (1 KB)
 - SOLIDWORKS Workgroup PDM VaultAdmin (41 MB)
 - SOLIDWORKS Workgroup PDM x64 Client Add-in (291 MB)

- Press the **Next** button or **Back to Summary** to go to the Summary page showing products and installation locations.



You will be shown a list of products you are going to install and their location. If you wish to modify any of these items you can press the **Change** link on any line item.



7. Press the **Install Now** or **Modify Now** to continue.



If you are using a 9010 or 0010 SOLIDWORKS Network serial number, you will be asked to specify the location of the server at this time.

8. The selected software will now install on this machine.



9. The selected installations are now on this machine. You have the options to automatically check for service pack updates periodically, open the "What's New" PDF or log on to the web and comment on the installation interface.

Installation is Complete

Show me What's New in SOLIDWORKS 2016.

10. You can choose to join the Customer Experience Program if you wish. This will periodically send fault and usage information via e-mail to SOLIDWORKS to help improve the product. This will not affect the performance of SOLIDWORKS on your computer. The logging takes place whether you choose this or do not. The only difference is whether SOLIDWORKS sends the log files to development to process the information.

Join the SOLIDWORKS Customer Experience Improvement Program

Participation helps improve the quality and stability of SOLIDWORKS products. SolidWorks Corp. does not access or collect model data or information about any of your other software applications. Participation does not impact the performance of SOLIDWORKS products.

[Tell me more](#)



- Yes, I want to join
- No, thank you
- Remind me later

Thank you for joining!

11. Press the **Finish** button to continue.



PDM Viewer Installation

Before installing the web based PDM Viewer, you will need to first load the following on your server:

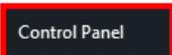
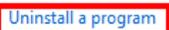
- Workgroup PDM Vault - See our SOLIDWORKS Workgroup PDM vault installation guide.
- Workgroup PDM VaultAdmin – See the loading Workgroup Clients section of this document.

If you do not have a vault loaded, see our Workgroup PDM Vault installation document.

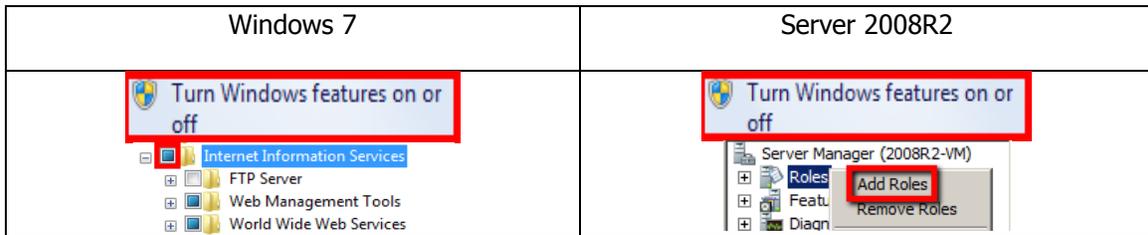
Loading Internet Information Services

To allow clients to access your vault via the internet, you will need to activate Microsoft Internet Information Services (IIS) on the vault server.

Go to the **Start menu > Control Panel > Uninstall a program.**

Windows 7	Server 2008R2
   Programs 	   Programs 

On the left side of the new window, click **Turn Windows Features on or off** then turn on the **Internet Information Services (Windows 7)**. In Windows Server 2008, right-click on **Roles**, select **Add Roles** from your Server Manager and follow the Add Roles Wizard to add the Web Server (IIS) component. Under Management Tools, find and check **IIS 6 Management Compatibility**. Also, check the option for **CGI** under Application Development.



You may be asked for the install disk of your operating system at this point. If so, insert the disk into the DVD drive and install the Microsoft component. Press **Finish** when completed

Now you can install the Workgroup PDM Viewer license on to the vault in order to enable the Viewer:

Click **Start, Control Panel** and choose **Uninstall a program** (Vista/Windows7)



Select **SOLIDWORKS** and then click the **Change** button.

Windows 7/Server 2008R2



1. The Windows installer will start up. Click the **Next** button to continue.



2. **Modify** the program and select **Next**

Modify

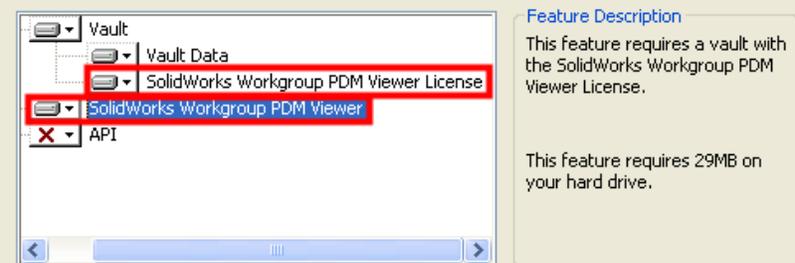


Change which program features are installed. This option displays the Custom Selection dialog in which you can change the way features are installed.

< Back Next >

3. Choose to Install the **SOLIDWORKS Workgroup PDM Viewer License** under the vault. Also choose to install the **SOLIDWORKS Workgroup PDM Viewer**. Press **Next**.

Click on an icon in the list below to change how a feature is installed.



The screenshot shows a tree view with 'Vault' expanded to 'Vault Data'. Two items are highlighted with red boxes: 'SolidWorks Workgroup PDM Viewer License' and 'SolidWorks Workgroup PDM Viewer'. To the right, a 'Feature Description' box contains text: 'This feature requires a vault with the SolidWorks Workgroup PDM Viewer License.' and 'This feature requires 29MB on your hard drive.'

4. You will be prompted for your Viewer license key. Copy and paste the key sent to you via e-mail from Hawk Ridge Systems. Also, enter the name of the computer that will have the vault stored on it. (Either the name of the server or localhost will work if the vault is stored on the same computer as the server). Press the **Next** button to continue.

SolidWorks Workgroup PDM Viewer license key:

If you leave the license key blank, the Vault will be installed without the SolidWorks Workgroup PDM Viewer features enabled. You can enter the license key later using Change License Info in the Vault Admin.

Enter the Vault Computer Name for use with the SolidWorks Workgroup PDM Viewer:

- You cannot use underscore characters in the name of the machine that hosts the viewer.
 - The viewer can only point to a single vault at any time.
 - The viewer product can be installed on any IIS server other than your PDM server. However the PDM server computer is the location you need to load the **SOLIDWORKS Workgroup PDM Viewer License** on to in order for the product to function correctly.
5. Press the **Install** button to begin loading the license on to the vault. You may be prompted for your SOLIDWORKS disk. If so, insert it into the DVD drive at this point.



6. Press **Finish** to complete.

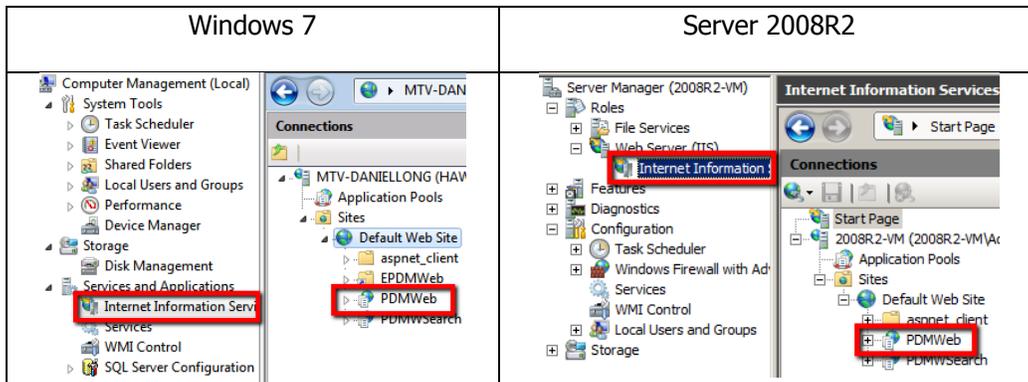


7. Verify that a virtual directory called PDMWeb was created. This directory allows clients access to the vault. You may need to reboot for this virtual directory to appear:

- a. Open **Computer Management** (Windows 7) or **Server Manager** (Server 2008) by right-mouse clicking **Computer** and select **Manage**.



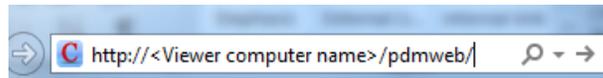
- b. Windows 7: Expand the **Services and Applications** directory, select **Internet Information Services (IIS) Manager**, expand the **Sites** folder and expand **Default Web Site**.
Server 2008: Expand **Roles, Web Server (IIS)**, select **Internet Information Services (IIS) Manager**, expand the **Sites** folder and expand **Default Web Site**.



Viewer Clients

Now that the license has been installed on the server and the vault is called out, you are able to access the Workgroup PDM vault on the client machines using Internet Explorer. The clients will need to have access to your network or server to do this.

1. Within Internet Explorer type "http://<Viewer computer name>/pdmweb/".



2. Login to the vault through this portal. You can conduct searches in the vault. Or if you switch to classic portal, you can look through the project folders within the vault.



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