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SOLIDWORKS PCB 2017 Installation Guide

TITLE:	SOLIDWORKS PCB 2017 Installation Guide
DATE:	09/23/2016
SUBJECT:	SOLIDWORKS PCB 2017 Installation
ABSTRACT:	This guide gives instructions for installing SOLIDWORKS PCB 2017 . It is written for standalone installations of SOLIDWORKS PCB 2017 . In this configuration, all program components are on the same computer.



This guide gives instructions for installing **SOLIDWORKS PCB 2017**. It is written for standalone installations of **SOLIDWORKS PCB 2017**. In this configuration, all program components are on the same computer. If your software is installed in a shared configuration where a server computer, or other computer able to reach the network, hosts **SOLIDWORKS PCB Services** data, while user computers run either **SOLIDWORKS PCB**, **SOLIDWORKS PCB Connector** or the **SOLIDWORKS PCB Add-In**. Please contact [Hawk Ridge Systems Technical Support](#) if you are unsure of your **SOLIDWORKS PCB** configuration type.

SOLIDWORKS PCB 2017 uses the same installation manager as other **SOLIDWORKS** products, including the 3D CAD software. If upgrading other **SOLIDWORKS** products along with **SOLIDWORKS PCB 2017**, please also refer to their [upgrade guides](#) for further instructions.

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.

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Product Information

SOLIDWORKS PCB is a PCB design tool that integrates with **SOLIDWORKS 3D** to allow collaboration between electrical and mechanical designers. Changes to a PCB design can be made in either **SOLIDWORKS PCB** or **SOLIDWORKS 3D** then synchronized between the two programs.

SOLIDWORKS PCB Connector is also available. This product enables **SOLIDWORKS 3D** integration with Altium Designer. Here the PCB design tools are provided by Altium Designer, while the 3D collaboration tools are provided by **SOLIDWORKS PCB Connector**. Note that sales and support for Altium Designer are not provided by Hawk Ridge Systems or **SOLIDWORKS**.

Refer to www.solidworkspcb.com for more information.

Licensing

SOLIDWORKS PCB 2017 can be used with standalone and network licenses. Note that the license type differs from the installation configuration type, which can be standalone or shared. The license type can be standalone or client-server (this guide is for the standalone configuration). Either license type can be used with either configuration type.

If you have a standalone license, you will need to activate **SOLIDWORKS PCB 2017** after installing. You will be automatically prompted to do this when launching the application after an upgrade. Refer to our



guide titled **2017 Product Activation** for more information on activation methods. If you are moving your **SOLIDWORKS PCB 2017** installation to a new computer, you will need to transfer your license activation off the old computer before activating on the new one. Refer to the [Appendix](#) for instructions on transferring your **SOLIDWORKS PCB** standalone license.

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 PCB 2017** that you are installing. If this is not already the case, refer to our guide titled **2017 Network Server Installation** to install and activate the **SolidNetwork License Manager**.

Configuration Requirements

If you are installing **SOLIDWORKS PCB 2017**, and are looking to take advantage of 3D imaging and data transfer, you must either install **SOLIDWORKS 3D** along with **SOLIDWORKS PCB 2017** or have **SOLIDWORKS 3D** previously installed on your computer. It is recommended that **SOLIDWORKS 3D** and **SOLIDWORKS PCB** be of the same version and service pack, however it is not required.

Program Components

If you have purchased **SOLIDWORKS PCB**, you will need to install:

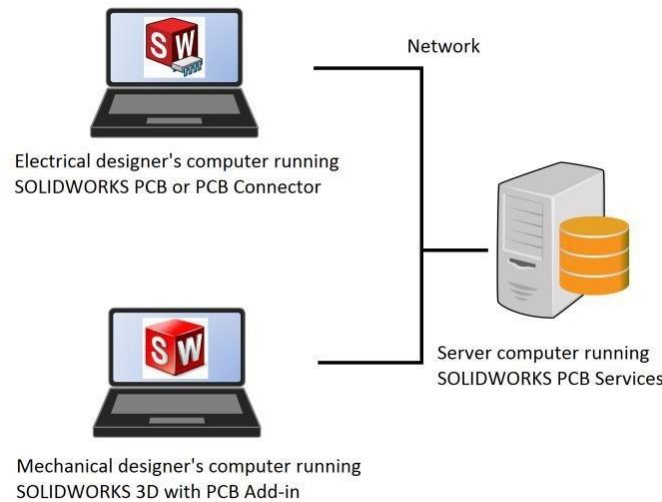
- **SOLIDWORKS PCB**
- **SOLIDWORKS PCB Services**
- **SOLIDWORKS PCB Add-In**

If you have purchased **SOLIDWORKS PCB Connector**, you will need to install:

- **SOLIDWORKS PCB Connector**
- **SOLIDWORKS PCB Services**
- **SOLIDWORKS PCB Add-In**

Refer to the table below for more information on the four program components.

Program Component	Description	Typical Installation Location
SOLIDWORKS PCB Services	Service that enables communication and collaboration between the SOLIDWORKS PCB and SOLIDWORKS 3D programs	Server computer accessible to all user computers
SOLIDWORKS PCB	Standalone PCB design program typically used by an electrical designer	ECAD user computer
SOLIDWORKS PCB Connector	Extension for Altium Designer to allow it to connect to SOLIDWORKS PCB Services, enabling 3D integration	ECAD user computer running Altium Designer
SOLIDWORKS PCB Add-In	Add-in for SOLIDWORKS 3D (typically used by a mechanical designer), allowing it to connect to SOLIDWORKS PCB Services and push changes back to SOLIDWORKS PCB	MCAD user computer running SOLIDWORKS 3D



Installation Types

SOLIDWORKS PCB can be installed in a shared or local configuration.

In a shared configuration, **SOLIDWORKS PCB Services** is installed on a server computer or another computer that is accessible over the network to all the user computers. The user computers run either **SOLIDWORKS PCB**, **PCB Connector** or the **SOLIDWORKS PCB Add-In**. These components all connect to **SOLIDWORKS PCB Services** over the network. This is illustrated in the image above.

In a local configuration, **SOLIDWORKS PCB Services** is installed on the same computer as the design tools (**SOLIDWORKS PCB Add-In** and **SOLIDWORKS PCB** or **SOLIDWORKS PCB Connector**). This would typically be used if one user works independently on the electrical and mechanical PCB design aspects, without collaboration.

Before Installation

Hawk Ridge Systems highly recommends checking your system before installing **SOLIDWORKS PCB 2017**. Follow these steps to ensure you are ready to install.

1. Check operating system and hardware compatibility.
 - Check that the hardware and operating system of your computer meet the **SOLIDWORKS PCB 2017** [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 installing **SOLIDWORKS PCB 2017**.
 - You can also review the Hawk Ridge Systems **SOLIDWORKS PCB 2017 System Requirements Guide**, which gives an in-depth look at optimizing a computer for use with **SOLIDWORKS PCB 2017**.
 - The **SOLIDWORKS PCB 2017** application is supported on these operating systems: Windows 7 SP1 (Professional, Ultimate and Enterprise), Windows 8.1, Windows 10.



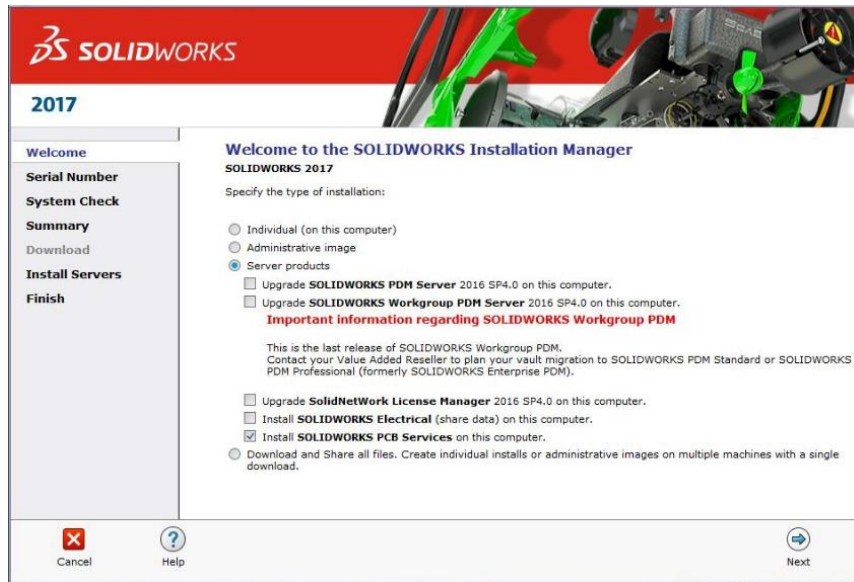
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- It is not supported on: Windows XP, Windows Vista, Windows 7, Starter and Home editions of Windows 7 SP1, Windows 8.
 - The **SOLIDWORKS PCB 2017** server components are supported on the same operating systems as the application, plus: Windows Server 2008 R2 SP1, Windows Server 2012.
 - Note that **SOLIDWORKS PCB 2017 is only supported on 64-bit operating systems.**
2. Check that you have sufficient free space on the destination drive before installing. Ensure the free space is greater than the estimated installation size (approximately 12 GB for the full **SOLIDWORKS 2017** installation with all components). Also make sure this drive has at least **15%** free space. A full disk can cause out-of-memory crashes and cannot be defragmented to optimize performance.
 3. Back-up your data.
 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 **SOLIDWORKS Installation Manager** can be used to download the necessary files and complete the installation in one process.
 - The **SOLIDWORKS Installation Manager** can also be used to download the full **SOLIDWORKS 2017** installation files before completing the installation. This file set is approximately 12 GB and is equivalent to the DVD. It is useful if several computers need to be upgraded, as the files can be copied to those computers via the network or a USB flash drive.
 - You can also use a **SOLIDWORKS 2017** DVD, if available. We strongly recommend installing any service pack updates if prompted during the installation.
 5. Ensure you are logged into Windows with an Administrator account. Disable any security software (anti-virus, anti-spyware, Windows User Account Control) for the duration of the installation.
 6. Close down all **SOLIDWORKS** programs and leave them closed for the duration of the installation.

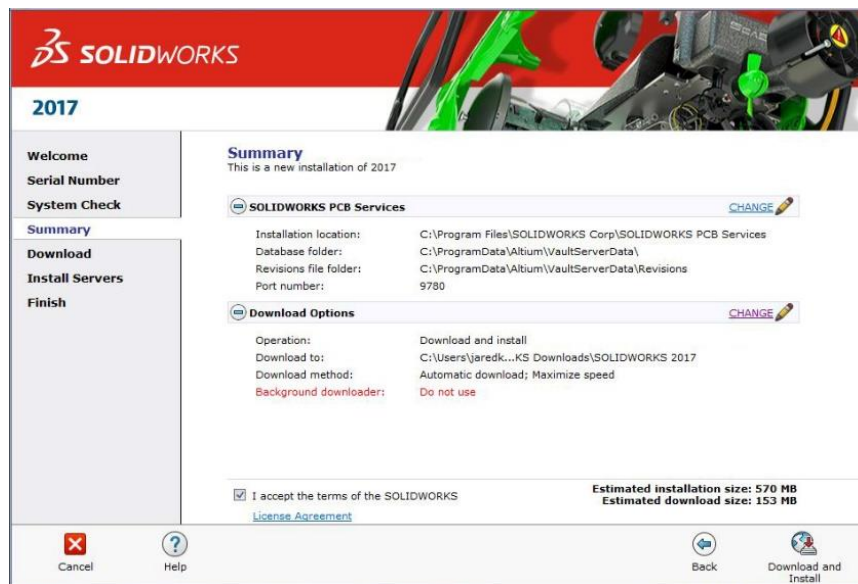
Installing SOLIDWORKS PCB Services

This section installs the **SOLIDWORKS PCB Services** program.

1. Select **Server Products** on the **Welcome** screen and navigate to **SOLIDWORKS PCB Services**.
2. Check the box next to **SOLIDWORKS PCB Services**, and click **Next**.



3. Specify the installation location, database folder, revisions file folder, and port number by selecting **CHANGE**, next to PCB Options on the **Summary Page**, for custom settings. Click **Back to Summary** when finished. We recommend keeping the default values for all options here.
4. **CHANGE** or accept the default(s), shown in the screenshots below, then click Download and Install.





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5. Open a browser and go to the URL `http://machinename:9780`, where `machinename` is the name of the computer running **SOLIDWORKS PCB Services** and 9780 is the port used at step 3 above (e.g. `http://server01:9780`). Note that `machinename` can be specified as `localhost` if you are connecting to **SOLIDWORKS PCB Services** from the same computer on which it is installed. We suggest bookmarking this page for easy access to the **SOLIDWORKS PCB Services** interface.
6. Log in with the user name **admin** and password **admin**.



Sign in to SOLIDWORKS PCB Services

Username

Password

Remember me

7. Click on **USERS > Add User**, then use the form to enter information for a new user. Repeat this for all the users that will be connecting to **SOLIDWORKS PCB Services**. Note that users can be added to roles and new roles can be created. Roles can then be used to control user permissions to **SOLIDWORKS PCB** data.

SOLIDWORKS | PCB
Powered by Altium

Help admin Inbox Sign Out

HOME **USERS** PROJECTS VAULT VCS STREAM STATUS

Users Roles LDAP Sync Licensing Sessions

Add User

User Name

*First Name:

*Last Name:

Authentication: Built in

*User Name:

*Password:

*Email:

Phone:

Role Name Member

User Roles: No data to display

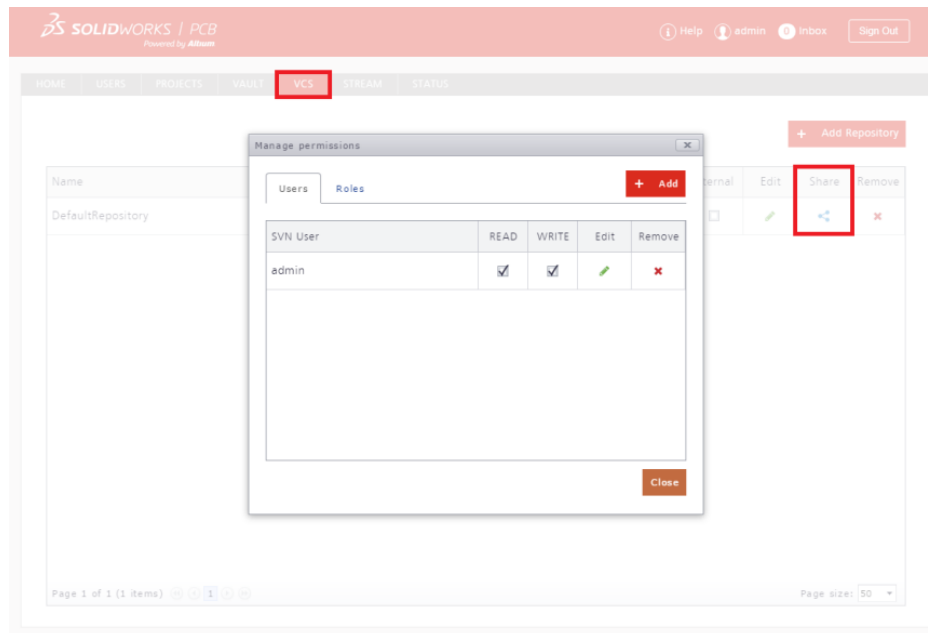
New Roles:

Page 1 of 1 (3 items) Page size: 50



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- After adding all users, click on the **VCS** tab to show the DefaultRepository. Click on the **Share** button to bring up the Manage Permissions dialog. Add users or roles to the repository to give the users added at step 7 access to this repository. Note that you can create multiple repositories with different users having different permissions to each.



- Click **Sign Out** when finished.
- Note that all user computers will need to be able to communicate with **SOLIDWORKS PCB Services** over the network on the port specified at step 3. Add exceptions to all firewalls or security programs that might affect this communication.

Standalone Installation

REMINDER: If upgrading from a previous version of SOLIDWORKS PCB, we strongly recommend backing up data before proceeding.

- Make sure you are logged in as the administrator.



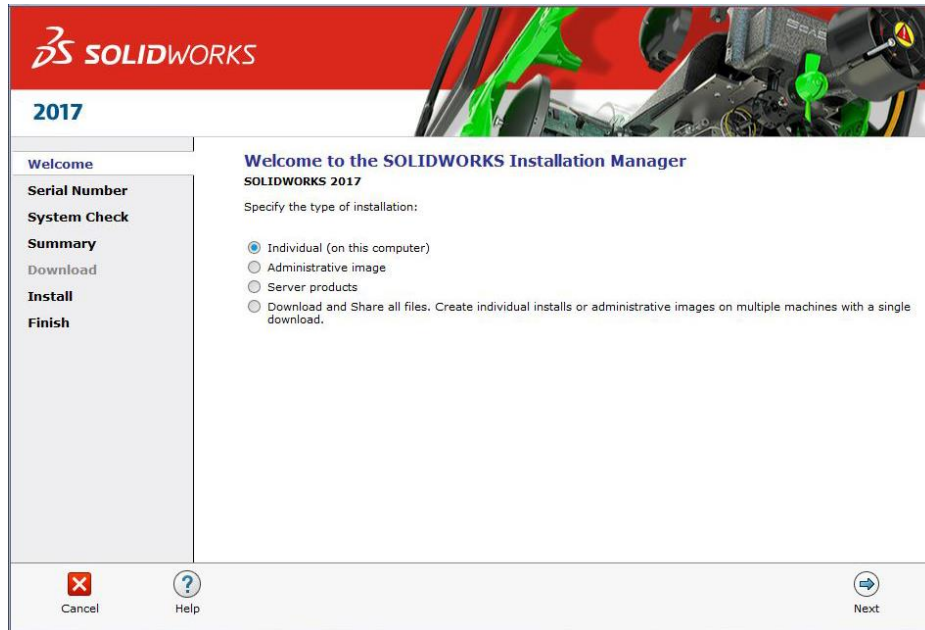
- Disable all anti-virus and anti-spyware tools and turn off Windows User Account Control.



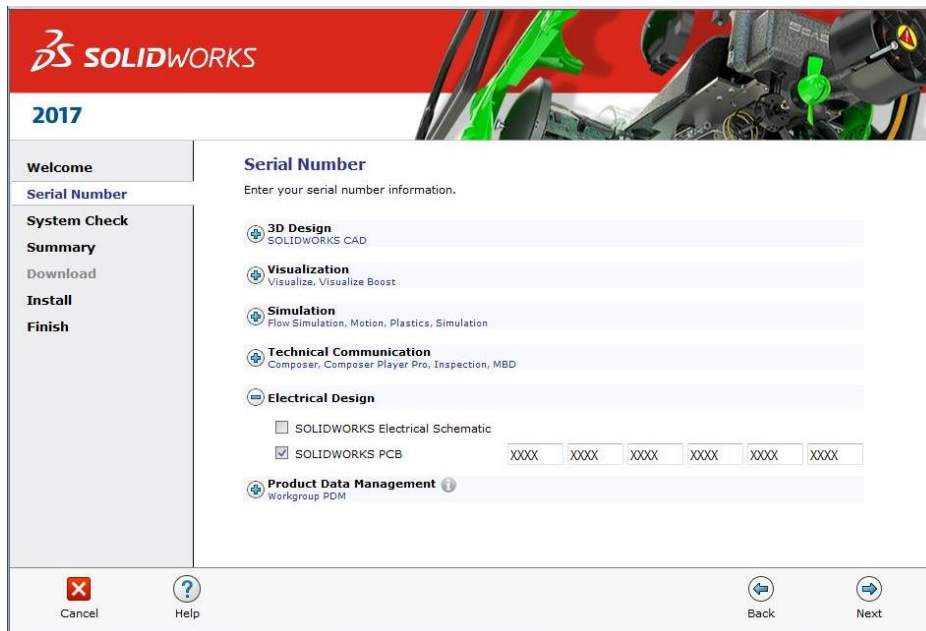


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3. Locate your **SOLIDWORKS 2017** installation media (DVD or download) and launch the setup application (setup.exe). You should see the **Welcome** screen for the **SOLIDWORKS Installation Manager**. Select **Individual (on this computer)** and click **Next**.



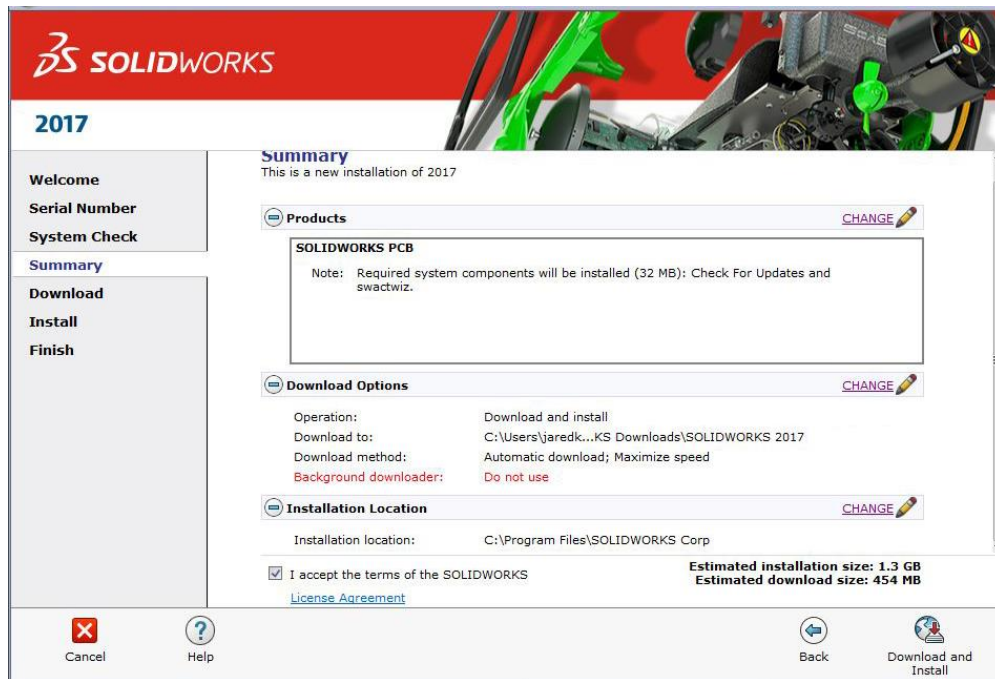
4. You will then see the **Serial Number** screen where you can enter your serial number for your **SOLIDWORKS PCB** installation. Note that you do not need to enter multiple serial numbers if your **SOLIDWORKS** serial number is the same as your **SOLIDWORKS PCB** serial number. Click **Next**.



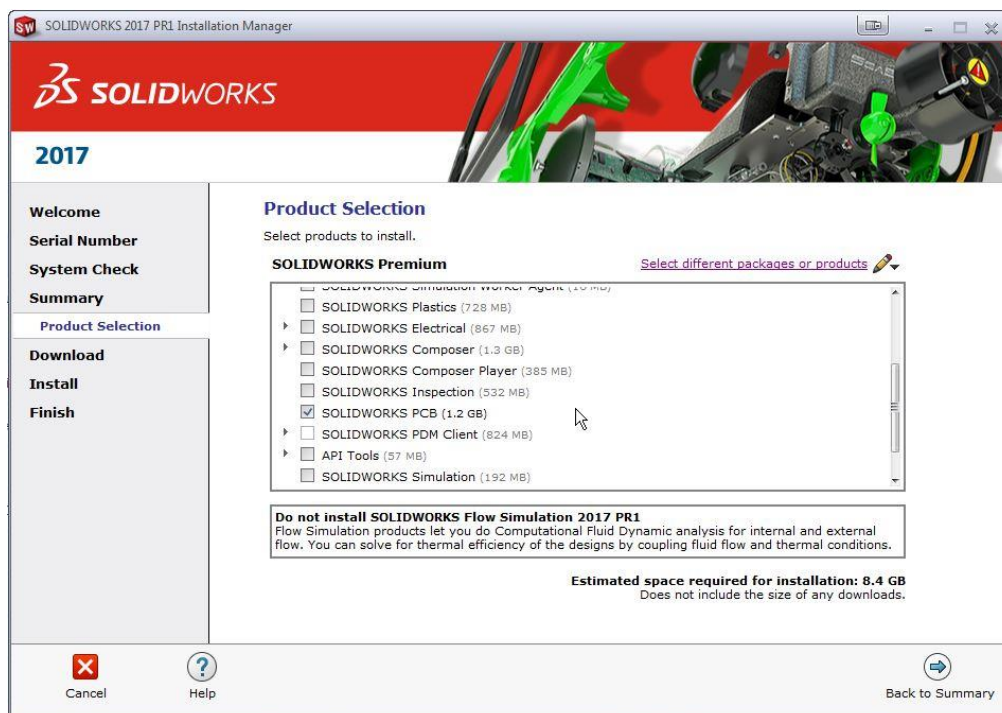
5. The **SOLIDWORKS Installation Manager** will verify your serial number and perform an automatic system check for any existing versions of **SOLIDWORKS** or **SOLIDWORKS PCB**. Take note of any messages or warnings during this step.



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



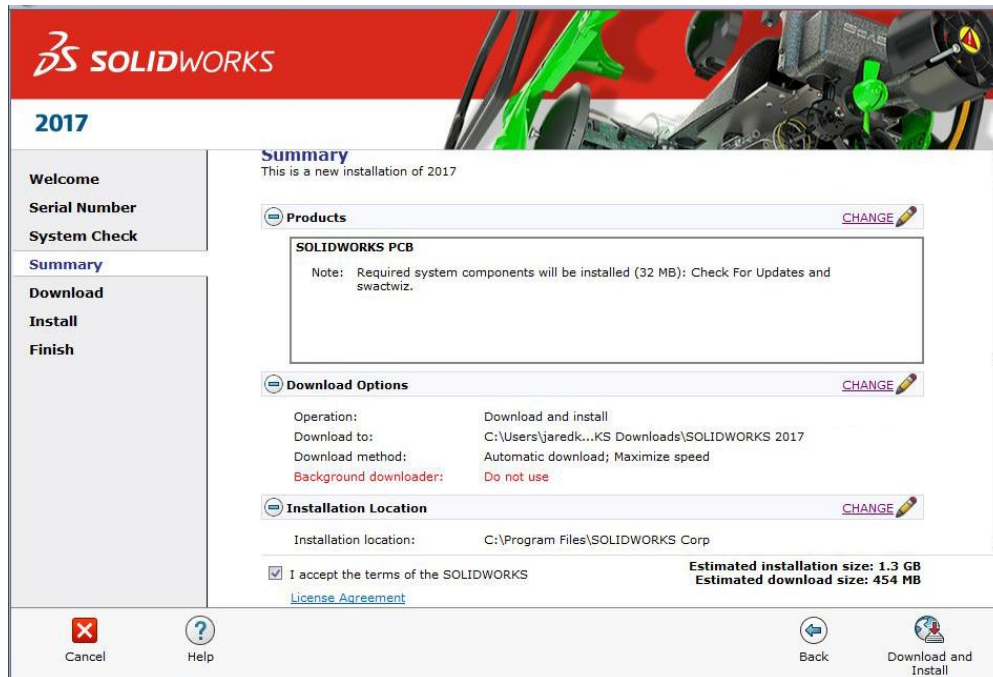
- Click **CHANGE** next to **Products** to go to the **Product Selection** screen. Scroll down and ensure that **SOLIDWORKS PCB** is checked **ON**. Nested here are the individual **SOLIDWORKS** products. Click **Back to Summary** when finished.



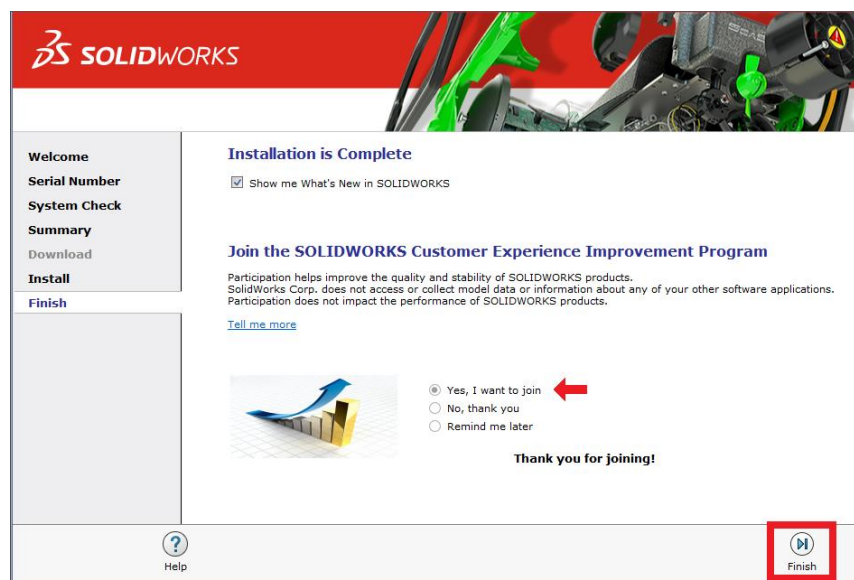


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- In the **Download Options**, we recommend disabling the **Background Downloader**, as it is known to cause issues with upgrades. Click **CHANGE** next to **Download Options**, then deselect **Use the background downloader**. Click **Back to Summary** when finished.
- Confirm that all the information on the **Summary** screen is correct. Accept the license agreement then click **Download and Install** to begin the installation.

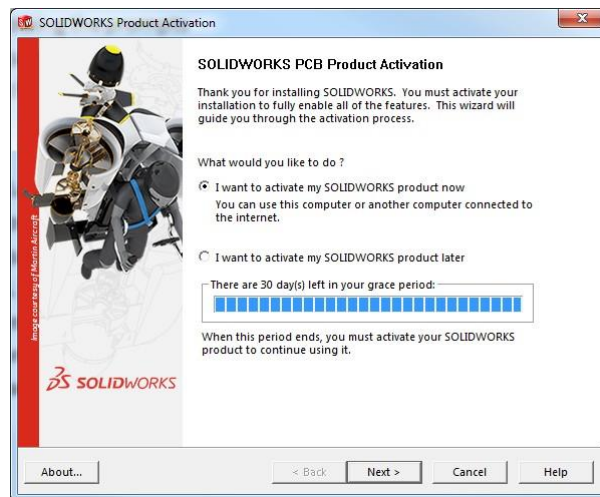


- When the installation is complete, you will be asked to join the [SOLIDWORKS Customer Experience Improvement Program](#). We recommend joining this, as it provides software performance information to **SOLIDWORKS** and enables the use of the CAD Admin Dashboard through the Customer Portal. The information 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 installation.

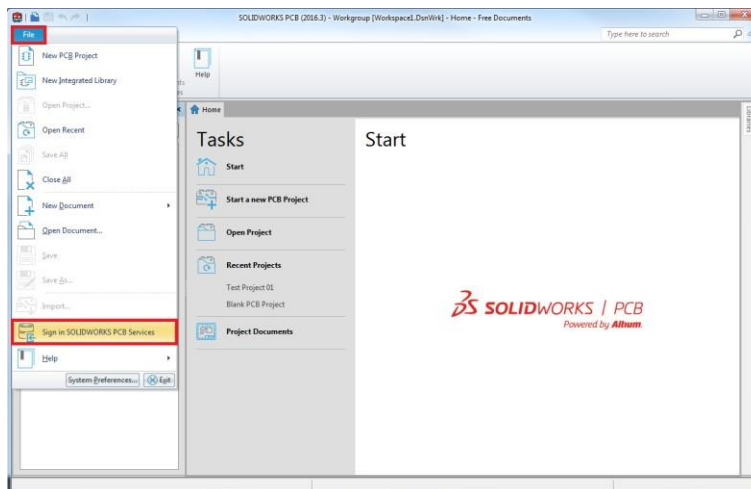




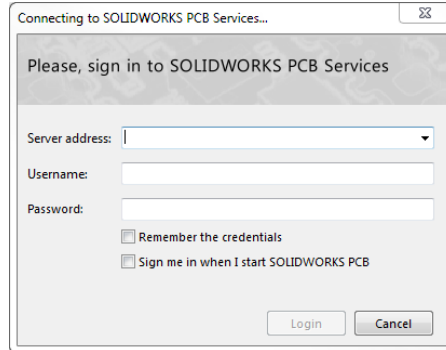
11. When the software is launched for the first time after installation, you may need to activate the license (if using standalone licensing). Follow the prompts to complete this. You will also be prompted to accept the license agreement.
12. When running **SOLIDWORKS PCB** for the first time, you may be prompted to allow **SOLIDWORKS PCB** through the firewall. Allow it, if so.
13. Follow the activation prompts to activate your **SOLIDWORKS PCB** license. Please refer to our article [2017 Product Activation](#) for more information on license activation and deactivation.



14. At the **SOLIDWORKS PCB** Start screen, click File > Sign in **SOLIDWORKS PCB Services**, or click **Start a New PCB Project**.



15. In the sign in dialog, for **Server Address**, enter the name of the computer running **SOLIDWORKS PCB Services** and the port number in the format machinename:9780. Note that machinename can be specified as localhost if **SOLIDWORKS PCB Services** is installed on the same computer as **SOLIDWORKS PCB** (i.e. when using a local configuration). Also enter your Username and Password, as specified at step 6 of the **SOLIDWORKS PCB Services** installation ([section 3](#)). Click **Login** to start using **SOLIDWORKS PCB**.

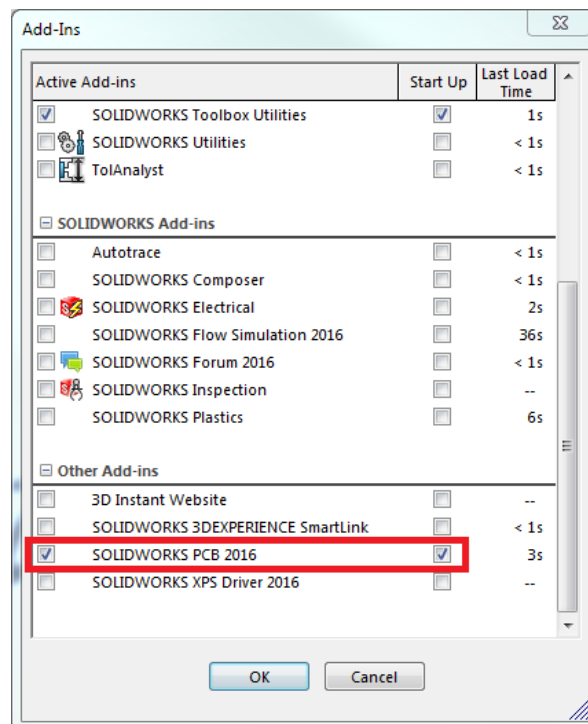


Installing SOLIDWORKS PCB Add-In

SOLIDWORKS 2016 & 2017

The **SOLIDWORKS PCB Add-In** is installed by default with **SOLIDWORKS 3D 2016 SP3** and above. If you are running an earlier service pack of **SOLIDWORKS 3D 2016**, upgrade to SP3 or above.

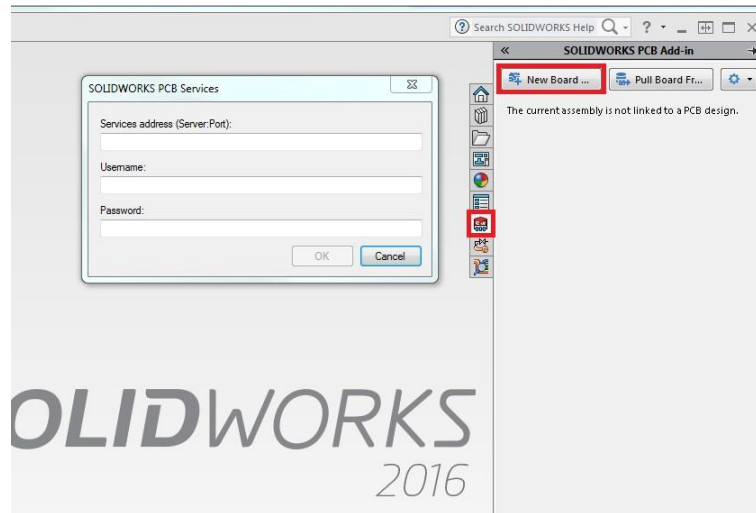
- To access the **SOLIDWORKS PCB Add-In**, run **SOLIDWORKS 3D** then go to Tools > Add-Ins > **SOLIDWORKS PCB 2016/2017** and click the check box to enable it. This will add the **SOLIDWORKS PCB** tab to the task pane on the right of the **SOLIDWORKS 3D** window.





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2. Select the **SOLIDWORKS PCB** tab from the **Task Pane** in **SOLIDWORKS 3D**. Select either **New Board Assembly** or **Pull Board From Vault** to bring up the **SOLIDWORKS PCB Services** sign in dialog. For **Server Address**, enter the name of the computer running **SOLIDWORKS PCB Services** and the port number in the format machinename:9780. Note that machinename can be specified as localhost if **SOLIDWORKS PCB Services** is installed on the same computer as **SOLIDWORKS 3D** (i.e. when using a local configuration). Also enter your Username and Password, as specified during the **SOLIDWORKS PCB Services** installation. Click **OK** to start using the **SOLIDWORKS PCB Add-In**.



SOLIDWORKS 2015

If you are running **SOLIDWORKS 3D 2015**, follow the directions below.

1. Go to the [SOLIDWORKS Customer Portal](#), click the **Downloads and Updates** link to access the **Downloads** page, then select the 2015 version and download the **SOLIDWORKS PCB Add-In** installation files.
2. Run the setup wizard then click **Next** at the **Welcome** screen.
3. At the **Select Destination Location** screen, specify the destination folder for the **SOLIDWORKS PCB Add-In** then click **Next**.
4. At the **Ready to Install** screen, click **Install**.
5. Click **Finish** once the installation completes.
6. When the setup dialog box appears, enter the name of the computer running **SOLIDWORKS PCB Services** and the port number in the format machinename:9780, then click **OK**. Note that machinename can be specified as localhost if **SOLIDWORKS PCB Services** installed on the same computer as the **SOLIDWORKS PCB Add-In** (i.e. when using a local configuration).

Installing SOLIDWORKS PCB Connector

Skip this section if you purchased **SOLIDWORKS PCB** instead of **SOLIDWORKS PCB Connector**.

1. Sign into your Altium Account if you are not signed in automatically.
2. Launch Altium Designer, open the **DXP** tab, then click **Extensions and Updates**.
3. On the **Extensions and Updates** page, scroll down to **SOLIDWORKS PCB Connector**, then click the download icon in the top-right corner to begin the installation.



4. In the Confirm dialog box, click **Yes** to proceed with the installation.
5. On the **SOLIDWORKS PCB Connector Registration** page, enter your **SOLIDWORKS PCB Connector** serial number and click **Register**.
6. On the Confirm dialog, either click **Yes** to restart the system and complete the installation, or click **No** to complete the restart later.

Appendix: License Transfer

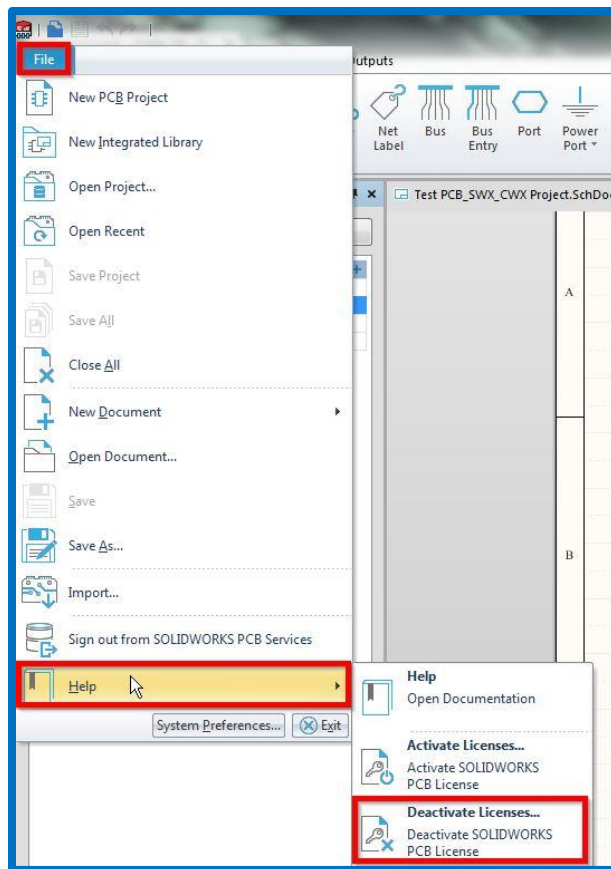
You are allowed two activations per standalone license, one for your business computer and one for your home computer. As part of the license agreement, you may not use both simultaneously.

Each activation transaction is coded to the hardware of your computer. If you are moving your **SOLIDWORKS PCB** installation to a new computer, you will need to transfer 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 PCB** 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 transfer process.

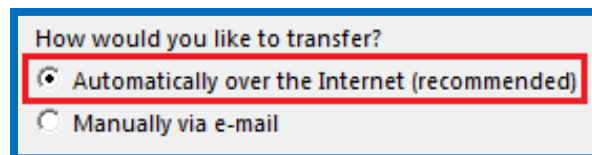
This process is not required for a new installation. If your computer does not have internet access, refer to the [E-mail Transfer](#) section of this document.

Online Transfer

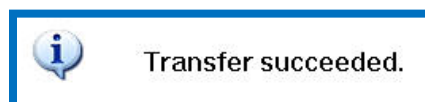
1. Go to Start > All Programs > **SOLIDWORKS 2017** > **SOLIDWORKS PCB**.
2. Once **SOLIDWORKS PCB** launches, click on the **File** tab and choose **Help>Deactivate Licenses...**



3. Choose to transfer **Automatically over the Internet** and click **Next**.



4. The software will connect to the **SOLIDWORKS** activation servers and you will be informed when the license has been successfully transferred.

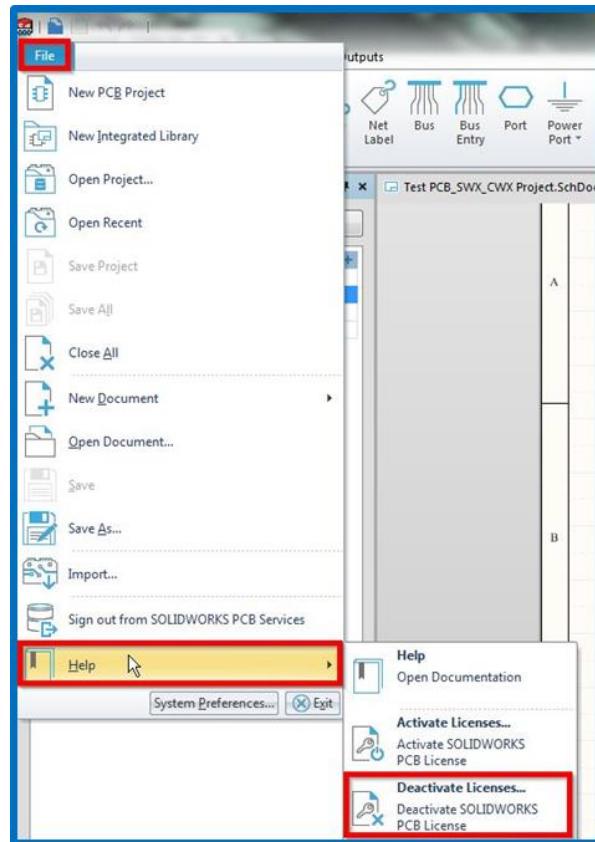


5. Press the **Finish** button to complete the process.

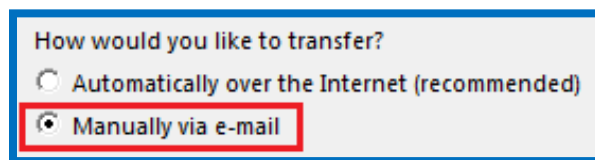
Note: SOLIDWORKS PCB will no longer run on this machine unless it is re-activated.

E-mail Transfer

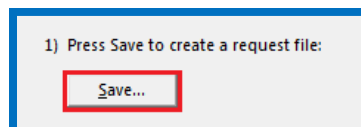
1. Go to Start > All Programs > **SOLIDWORKS 2017** > **SOLIDWORKS PCB**.
2. Once **SOLIDWORKS PCB** launches, click on the **File** tab and choose **Help>Deactivate Licenses...**



3. Choose to activate **Manually via e-mail** and click **Next**.



4. 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 PCB to complete the transfer.



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5. 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 move it to a machine with internet access.

File name: [] Save
Save as type: Text Documents (*.txt) Cancel

6. E-mail this file as an attachment to activation@solidworks.com.

2) Email the request file to the following address to get a activation@solidworks.com

7. **SOLIDWORKS** will send a return e-mail with a different .txt file attached. Save this file to a removable storage device and move it to the machine awaiting the activation transfer.

From: SW Activation
To: [redacted]
Cc:
Subject: Activation Status
Message SWActivateResponse.[redacted].txt (3 KB)

8. In the activation wizard, press the **Open** button on the e-mail activation page.

3) Press Open to load a response file:

Open...

9. Browse to the response file and press the **Open** button.

File name: [] Open
Files of type: Text Documents (*.txt) Cancel

10. The next page will show you that your transfer is complete.



Transfer succeeded.

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

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