How To Upgrade SOLIDWORKS Electrical Client-Server

TITLE:	How To Upgrade SOLIDWORKS Electrical Client-Server
DATE:	September 2024
SUBJECT:	SOLIDWORKS Electrical
ABSTRACT:	Guide for upgrading the SOLIDWORKS Electrical Client-Server

This guide gives instructions for upgrading SOLIDWORKS Electrical to the newest version. 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 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 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 taking a moment before installing SOLIDWORKS Electrical and checking that you are ready to load your new software. First, ensure that your computer meets minimum system requirements and that your video card passes certification checks. 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 Electrical. Older versions of SOLIDWORKS Electrical cannot open files from newer versions.

1. Confirm your community's working version.

   - 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.

2. 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.

3. Obtain your SOLIDWORKS installation media.

   - The latest version of the SOLIDWORKS Installation Manager can be downloaded from the SOLIDWORKS downloads page.
   - 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 installation files ahead of the upgrade. This complete file set is approximately 21 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 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 Product Activation guide 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 Network Server Installation guide to install and activate a suitable version of the SolidNetWork License Manager.

Configuration Requirements

SOLIDWORKS Electrical 2025 includes Microsoft SQL Server 2022 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 titled **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.

SQL Server Upgrade:

If you are upgrading from a previous version of SOLIDWORKS Electrical, you may need to upgrade your SQL Server Express to 2019 or newer since **SQL 2017 and older is no longer compatible**. If your SQL Server Express is already running 2019 or newer you can ignore this. Please see the guide below on how to upgrade SQL versions:

1. Insert the SQL Server installation media. From the root folder, double-click setup.exe or launch the SQL Server Installation Center from Configuration Tools. To install from a network share, locate the root folder on the share, and then double-click Setup.exe.
2. To upgrade an existing instance of SQL Server to a different edition, from the SQL Server Installation Center click **Maintenance**, and then select **Edition Upgrade**.
3. If Setup support files are required, SQL Server Setup installs them. If you are instructed to restart your computer, restart before you continue.
4. The System Configuration Checker runs a discovery operation on your computer. To continue, click **OK**.
5. On the Product Key page, select a radio button to indicate whether you are upgrading to a free edition of SQL Server, or whether you have a PID key for a production version of the product. For more information, see Editions and Components of SQL Server and Supported Version and Edition Upgrades.
6. On the License Terms page, read the license agreement, and then select the check box to accept the licensing terms and conditions. To continue, click **Next**. To end Setup, click **Cancel**.
7. On the Select Instance page, specify the instance of SQL Server to upgrade.
8. The Edition Upgrade Rules page validates your computer configuration before the edition upgrade operation begins.
9. The Ready to Upgrade Edition page shows a tree view of installation options that were specified during Setup. To continue, click **Upgrade**.

10. During the edition upgrade process, the services need to be restarted to pick up the new setting. After the edition upgrade, the Complete page provides a link to the summary log file for the edition upgrade. To close the wizard, click **Close**.
11. The Complete page provides a link to the summary log file for the installation and other important notes.
12. If you are instructed to restart the computer, do so now. It is important to read the message from the Installation Wizard when you are done with Setup. For information about Setup log files, see View and Read SQL Server Setup Log Files.
13. If you upgraded from SQL Server Express, you must perform additional steps before you can use your upgraded instance of SQL Server:
    a. Enable the SQL Server Agent service in Windows SCM.
    b. Provision the SQL Server Agent service account by using SQL Server Configuration Manager.

In addition to the steps above, you may need to do the following if you upgraded from SQL Server Express:

> Users that were provisioned in SQL Server Express remain provisioned after the upgrade. Specifically, the BUILTIN\Users group remains provisioned. Disable, remove, or reprovision these accounts as needed. For more information, see Configure Windows Service Accounts and Permissions.
> Sizes and recovery mode for the tempdb and model system databases remain unchanged after the upgrade. Reconfigure these settings as needed. For more information, see Back Up and Restore of System Databases (SQL Server).
> Template databases remain on the computer after the upgrade.

For more information about the upgrade please see the full Microsoft article here: https://learn.microsoft.com/en-us/sql/database-engine/install-windows/upgrade-sql-server?view=sql-server-ver16

SOLIDWORKS Electrical Server Components Upgrade:

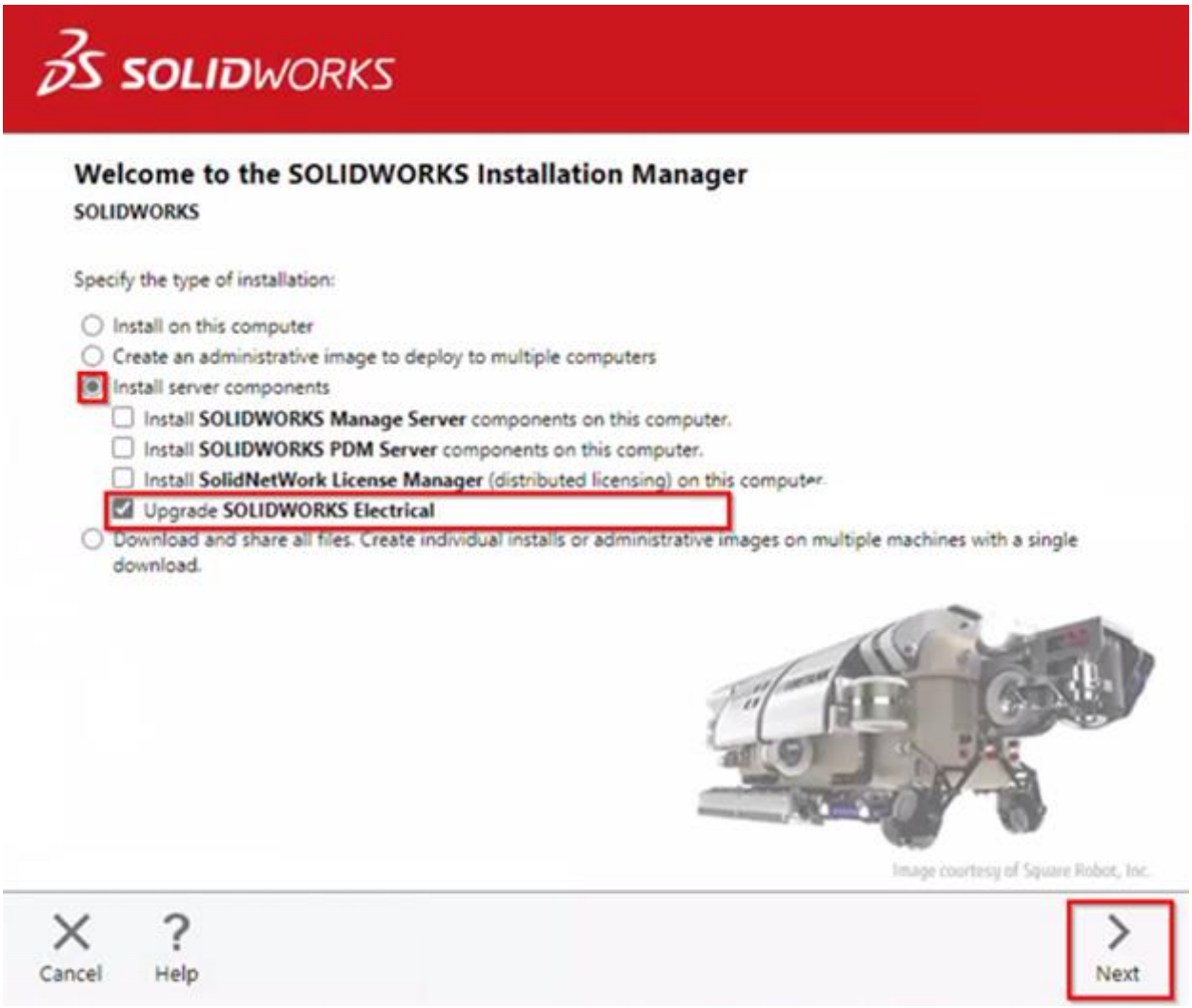
1. Close the SOLIDWORKS Electrical application on all client computers to ensure no users are connected to the server.

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.

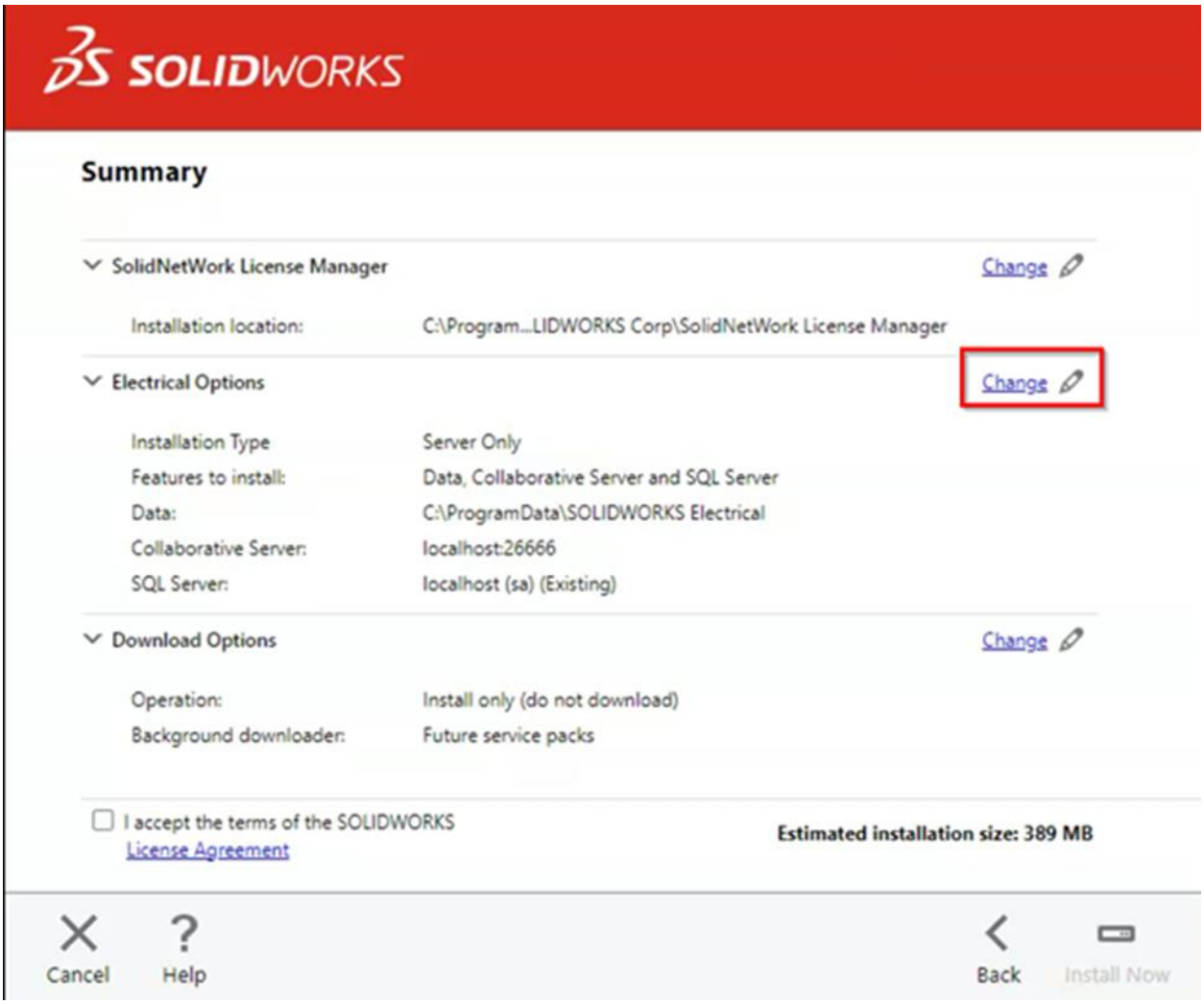
4. Once all client applications are closed, stop the collaborative server service on the server computer. This will be named **SOLIDWORKS Electrical Collaborative Server** in the Windows Services tool.

5. Locate your SOLIDWORKS installation media (download or DVD) and launch the setup application (setup.exe). You should see the Welcome screen for the SOLIDWORKS Installation Manager. Select **Upgrade SOLIDWORKS Electrical on this computer** under **Install server components** then click **Next**.



6. 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**.
   Note: If option is grayed out with dialog "SOLIDWORKS Electrical cannot be upgraded, Schematic and /or 3D is installed", You must either uninstall the client version of SOLIDWORKS Electrical or Use the "install on this computer option" to upgrade both components. Please see SOLIDWORKS Electrical Standalone installation guide for detailed installation instructions.

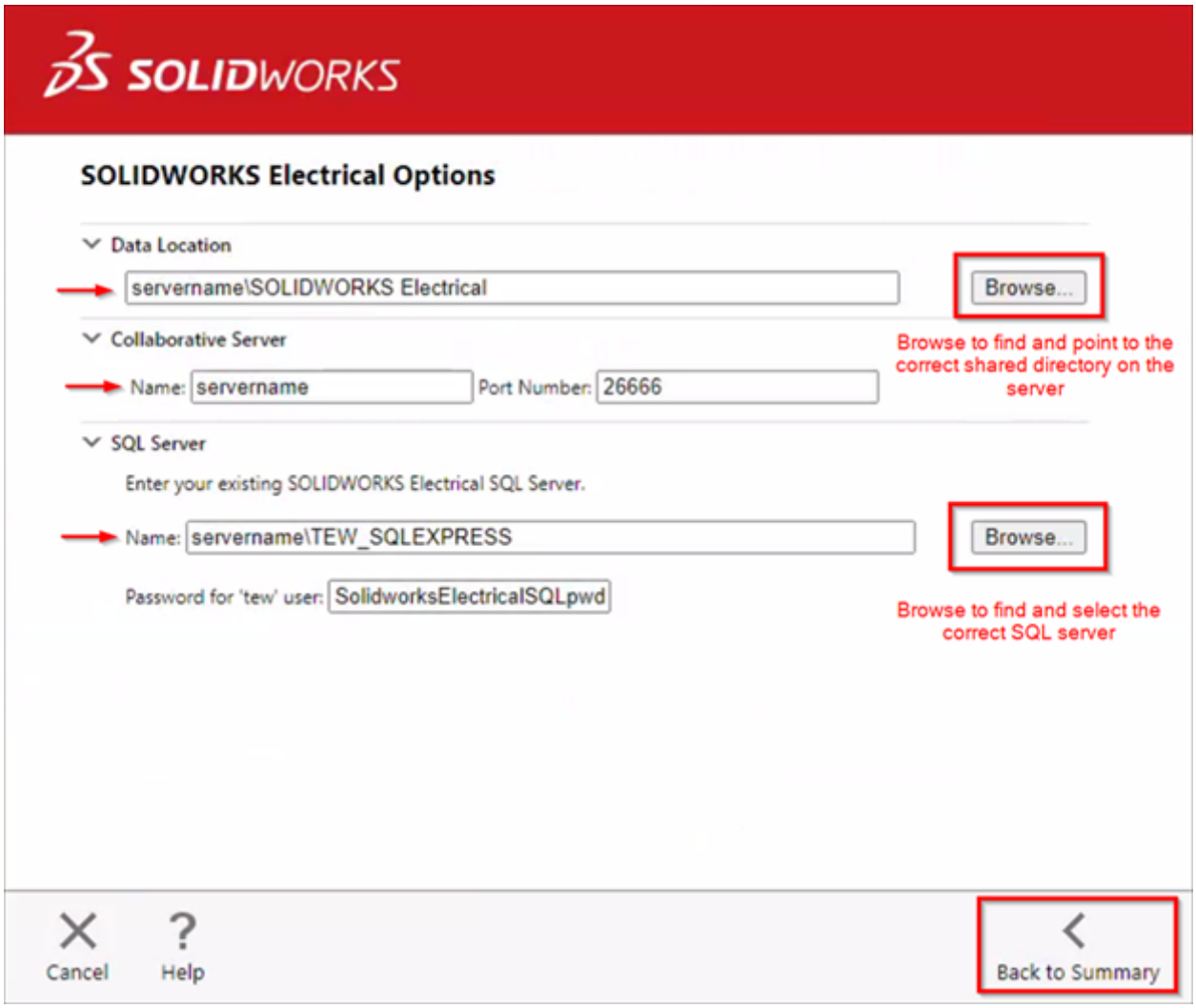
7. You will then see the Summary screen with details of the **Electrical Options**. Click **Change** to edit these options.



8. 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.

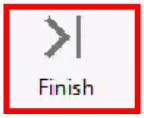
- For an upgrade, we recommend changing the authentication type to **Connect using SQL Server Authentication** to prevent any permissions issues from affecting the upgrade. Make the login **sa** (not tew) and use the appropriate password. This will be **SOLIDWORKSElectricalSQLpwd4ew (or SQLpwd4ew if your first time installing the software was version 2022 or older)** unless explicitly changed by the administrator during the original installation.



Note: SQL Server 2019 (or newer) is required to install SOLIDWORKS Electrical 2025. To use an existing SQL Server database, you must upgrade to SQL 2019 prior to upgrading SOLIDWORKS Electrical or select the "Install a new instance of SQL Server" option to proceed with the install.

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. 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.

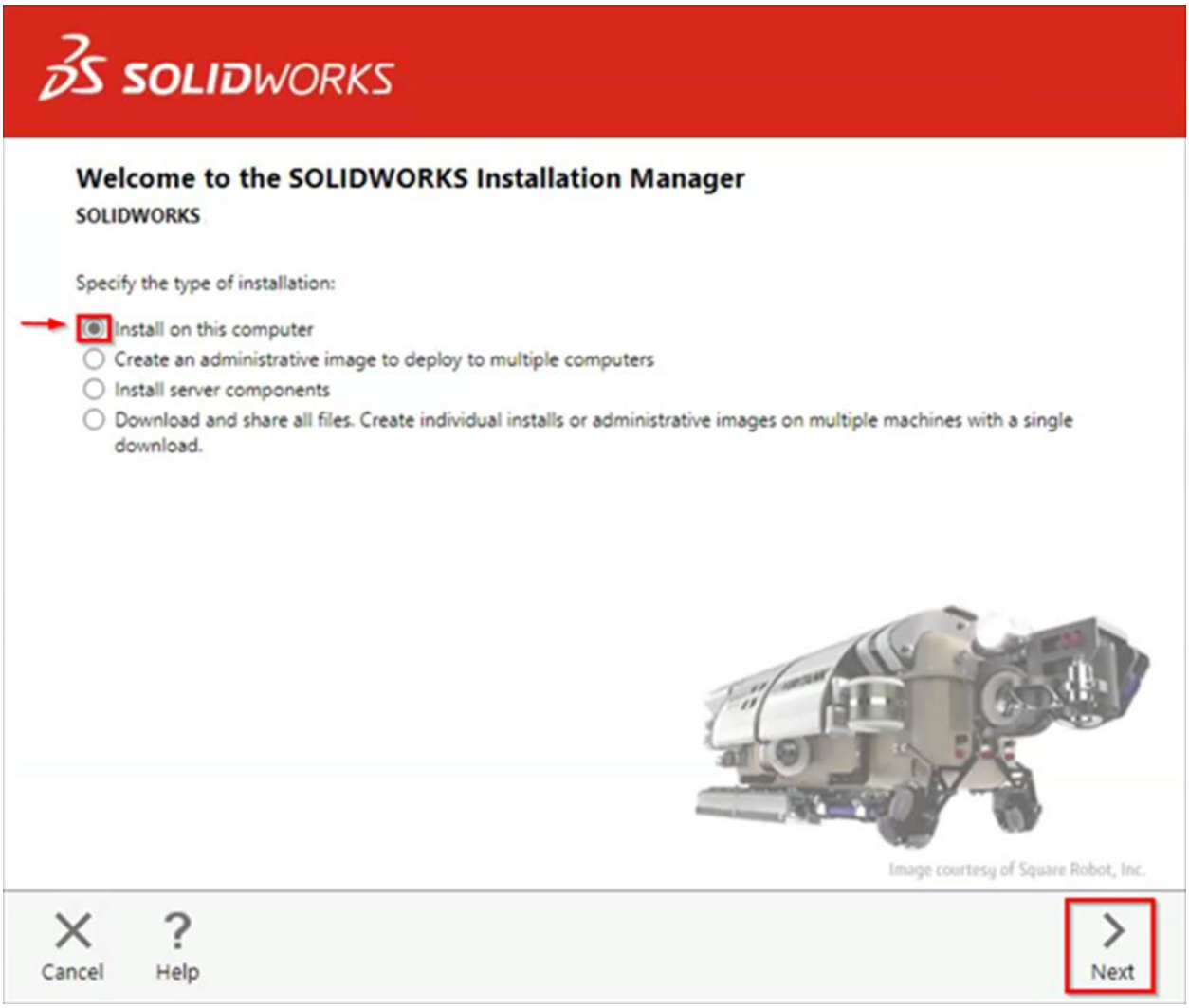


11. Reboot the server computer. Check Windows Services and start the SOLIDWORKS Electrical Collaborative Server service if it is not already started.

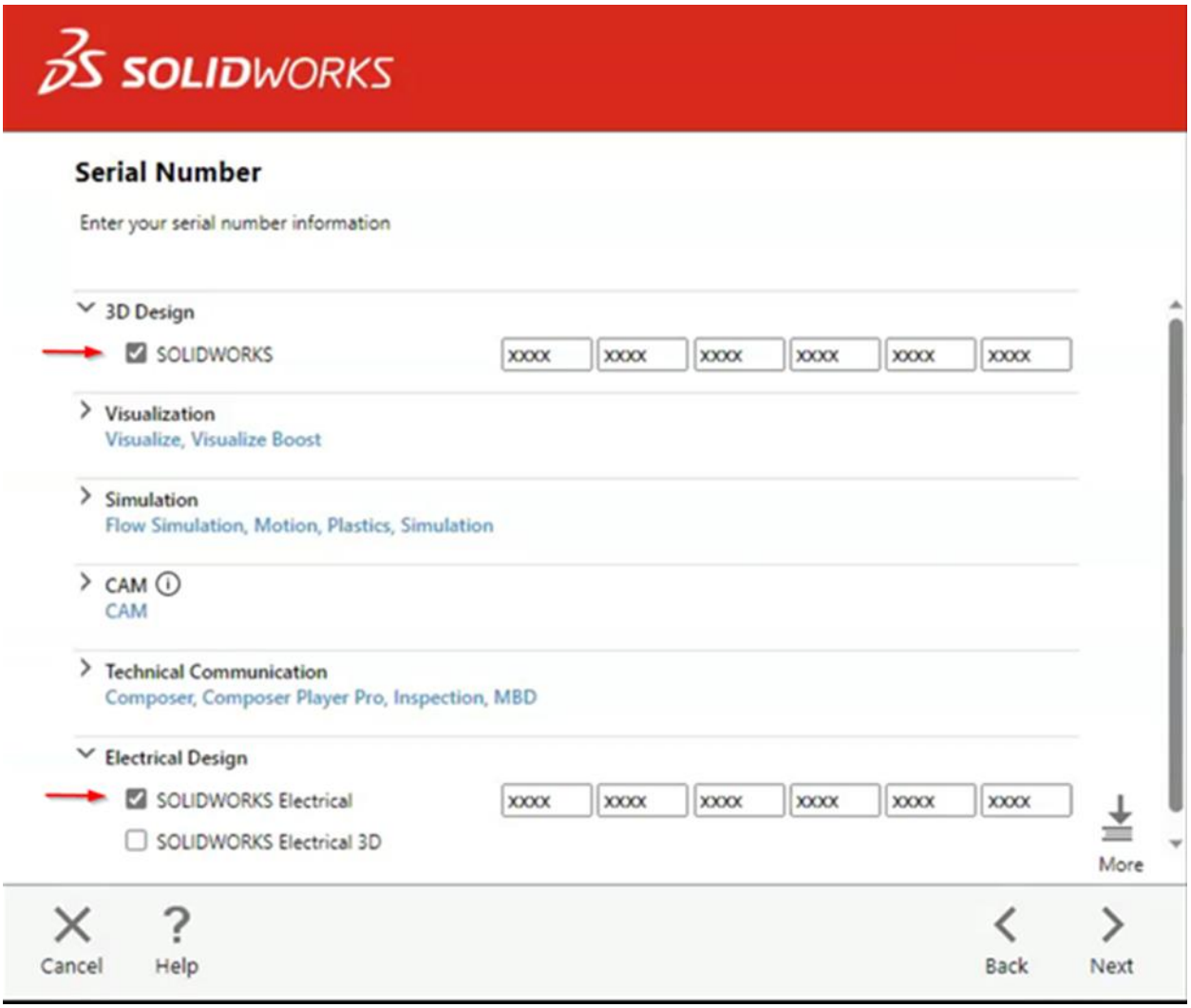
Client Upgrade

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 installation media (download or DVD) and right-click on setup.exe and choose Run as Administrator to launch the setup application. You should see the Welcome screen for the SOLIDWORKS Installation Manager. Select **Install on this computer** then click **Next**.

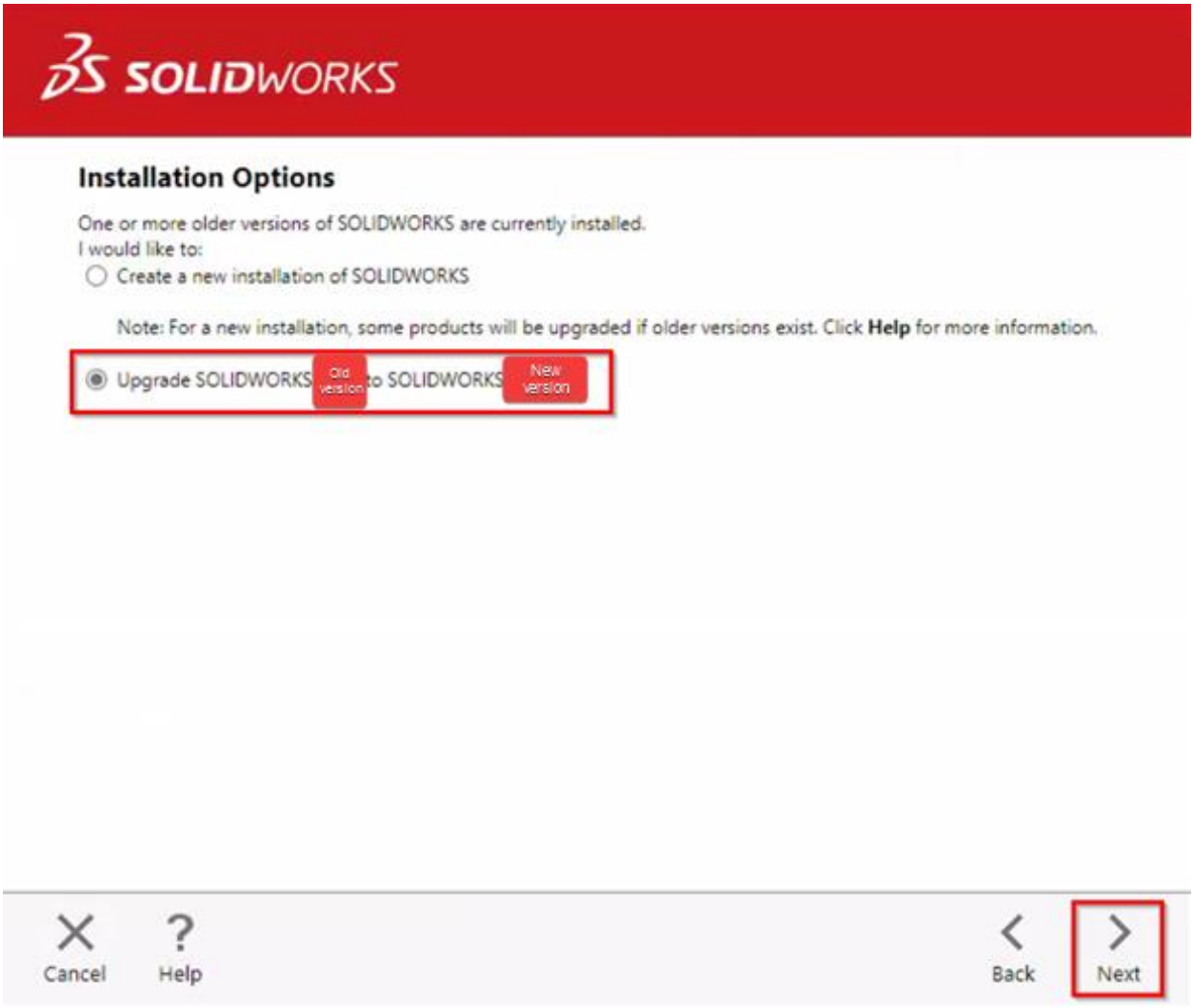


4. You will then see the Serial Number screen. This should already contain your existing SOLIDWORKS licenses. Note that you do not need to enter multiple serial numbers if your SOLIDWORKS serial number is the same as your SOLIDWORKS Electrical serial number. If you are only upgrading the SOLIDWORKS Electrical Schematic application, the serial number should be entered in the corresponding field. Only check and enter the SOLIDWORKS Electrical 3D option if you have a separate license serial number for it. Click **Next**.

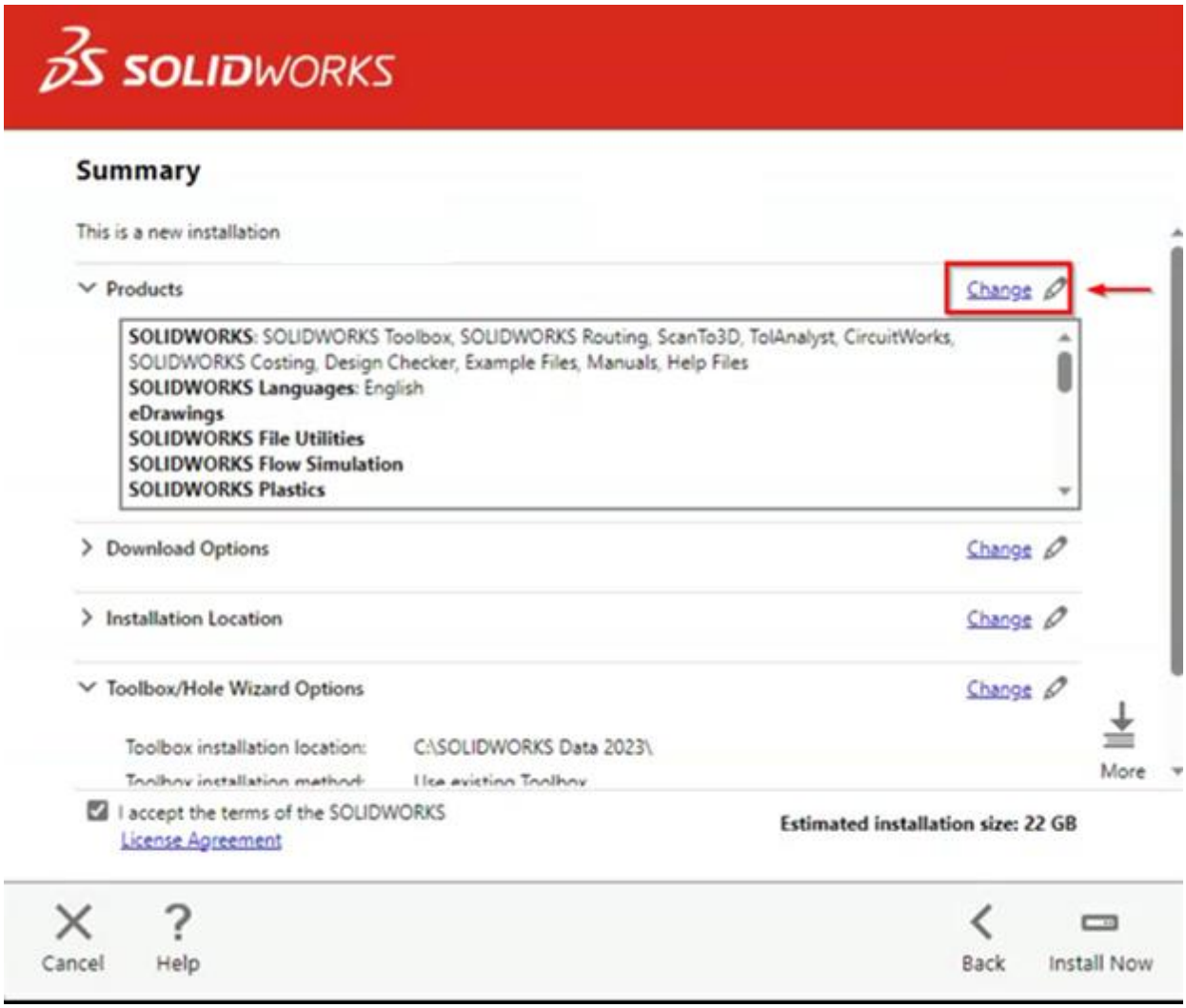


5. The Installation Manager will verify your serial number and perform an automatic system check for any existing versions of SOLIDWORKS or SOLIDWORKS Electrical. Take note of any messages or warnings during this step then click **Next**.

6. If upgrading from one major version to another (e.g., 2024 to 2025), 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**.

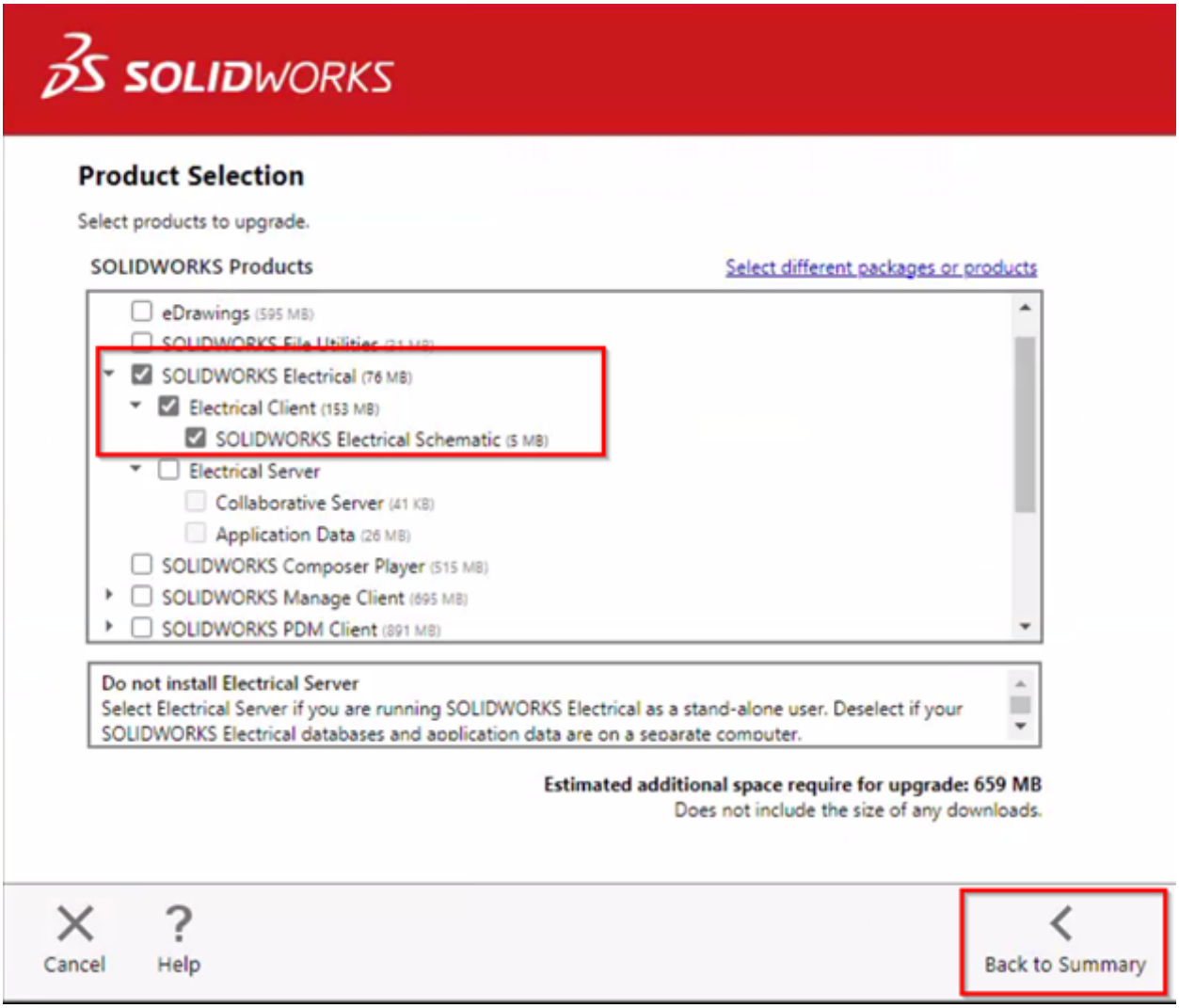


7. At the Summary screen, you can change the settings and options defined for the upgrade. To do so, click **Change** on the right side of each option.



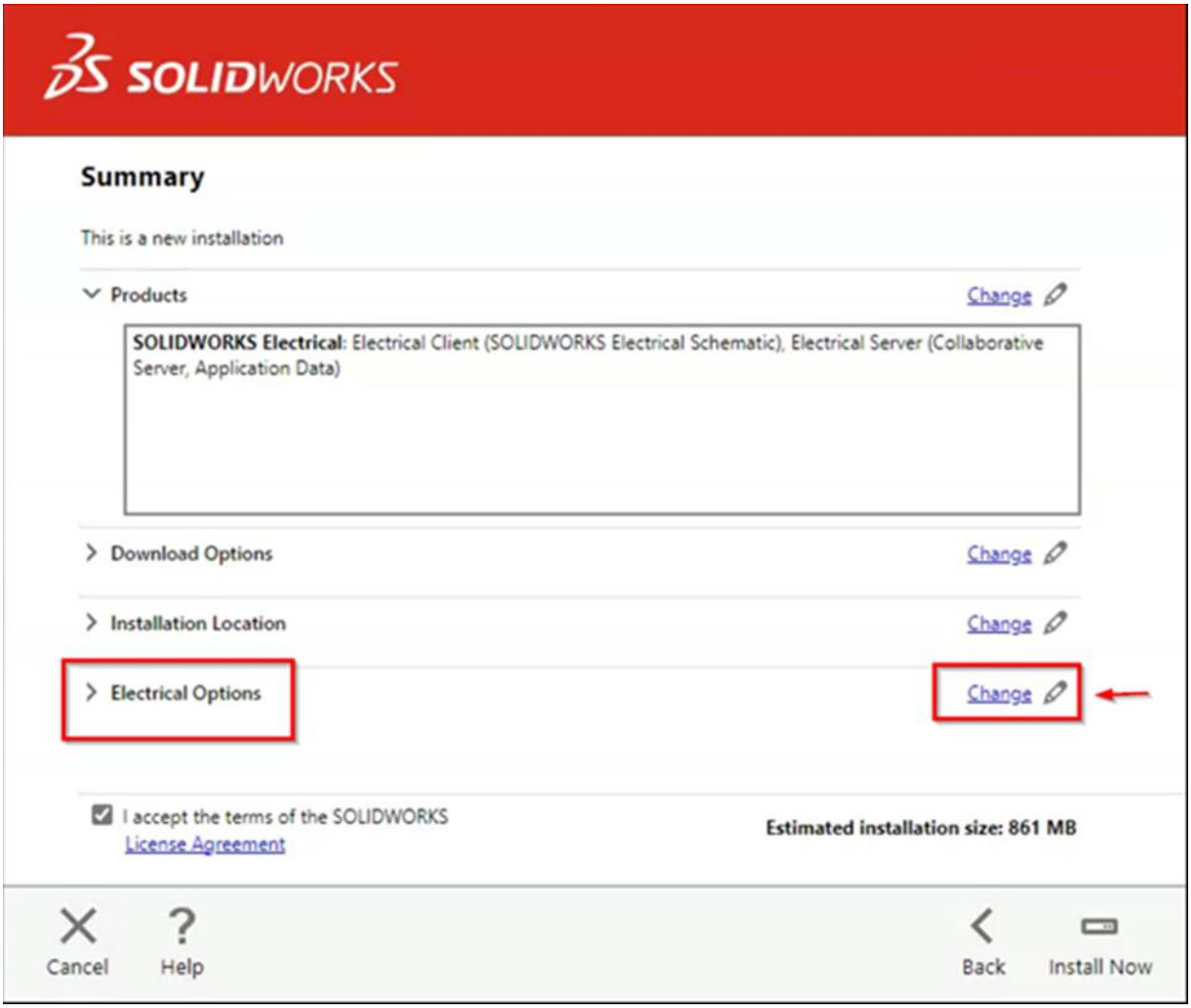
8. Click **Change** next to Products to go to the Product Selection screen. Scroll down and ensure that SOLIDWORKS Electrical is checked on. Nested here are the individual Electrical components. Check these against the information below. Click **Back to Summary** when finished.

- **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**.



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

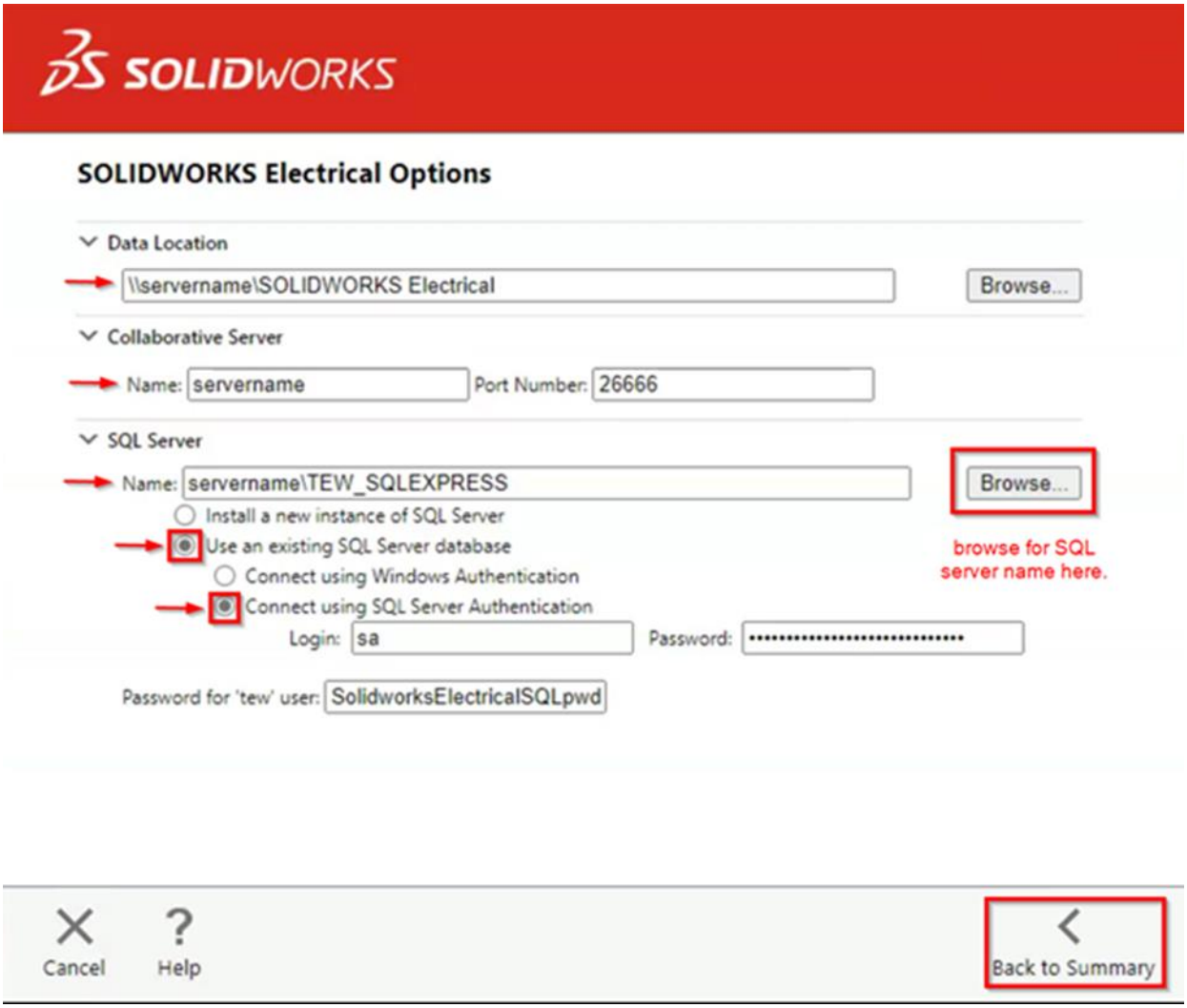
10. Click **Change** next to Electrical Options to go to the Electrical Options screen. Scroll down and ensure that Data Location, Collaborative Server, and SQL Server fields are correct and are pointing to the servername (not localhost). Click **Back to Summary** when finished.



- **Data Location** specifies the directory that contains all 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 on the server (e.g., \\servername\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., servername) 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

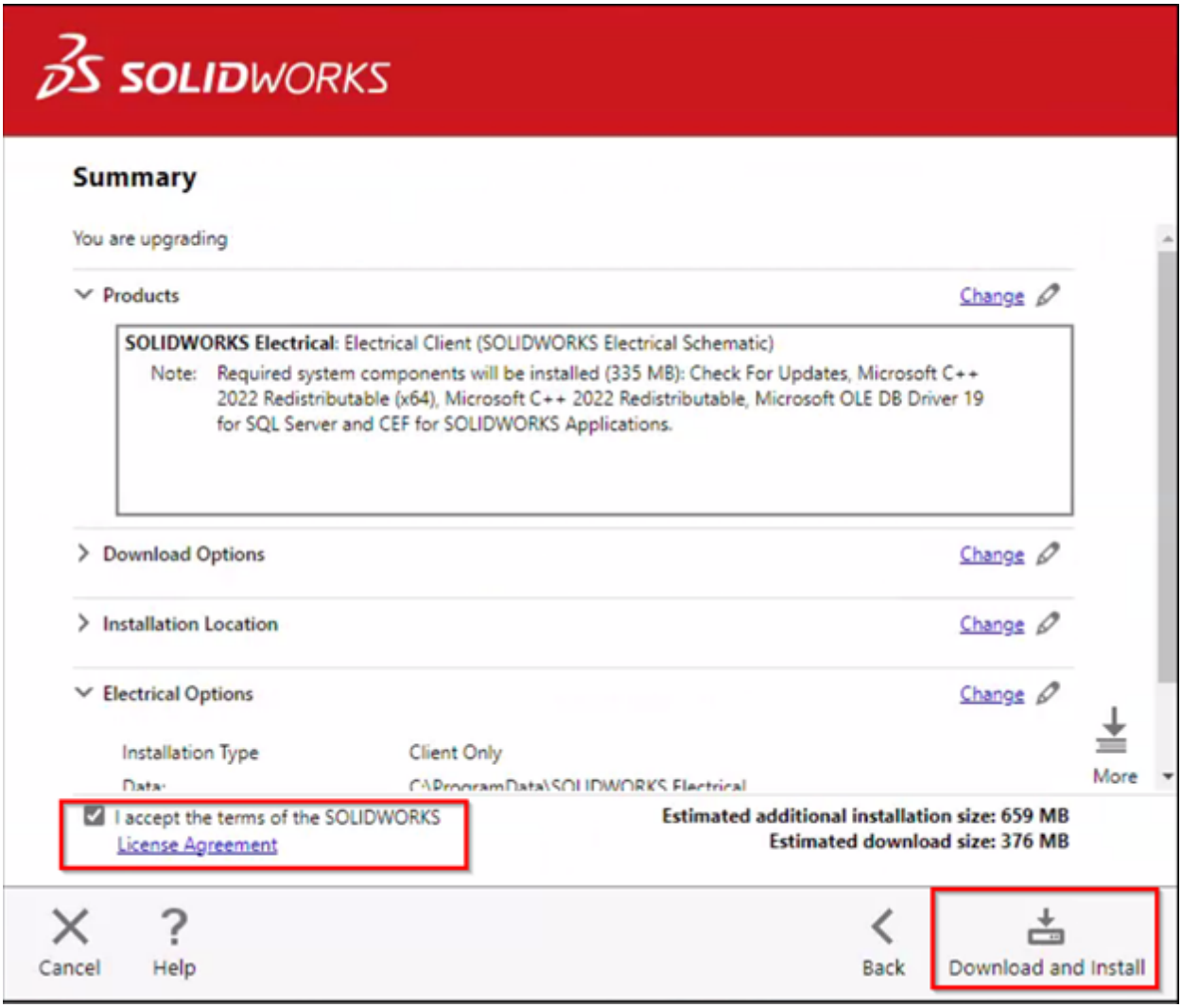
computer (e.g., servername\TEW_SQLEXPRESS). If it is incorrect, click **Browse** to find and select the correct SQL server.

Note: SQL Server 2019 (or newer) is required to install SOLIDWORKS Electrical. You must upgrade to SQL 2019 on the server prior to upgrading SOLIDWORKS Electrical.

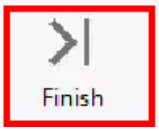


11. In the Download Options, we recommend disabling the Background Downloader, as it is known to cause issues. Click **Change** next to Download Options, then deselect **Use the background downloader** if not already deselected. Click **Back to Summary** when finished.

12. Confirm that all the information on the Summary screen is correct. Accept the license agreement then click **Download and Install** to begin the upgrade.

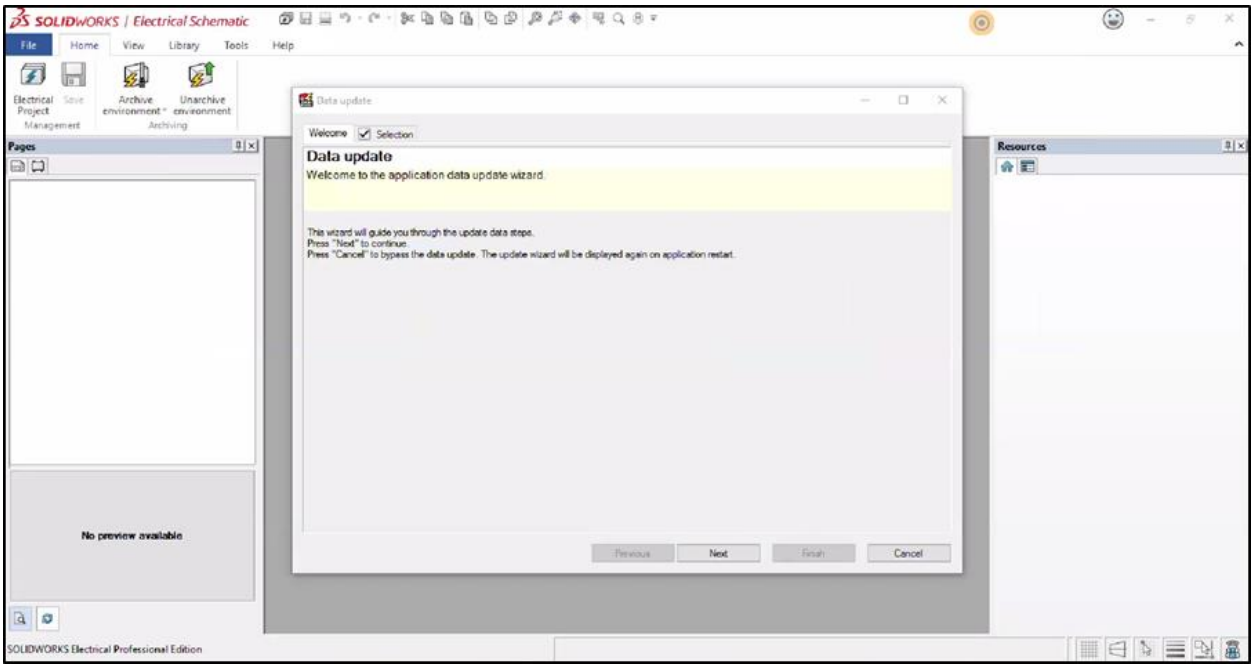


13. When the upgrade is complete, you will be asked to join the SOLIDWORKS Customer Experience Improvement Program. We recommend joining this, as it provides software performance information to SOLIDWORKS. The information this sends to SOLIDWORKS is treated confidentially and does not result in the transfer of any file information. After making the selection, click the **Finish** button to complete the upgrade.



14. 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.

15. 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.



For further assistance, please contact our support team at support@hawkridgesys.com, or 877-266-4469 (US) or 866-587-6803 (Canada).