

# Quick Steps for Upgrading the PDM Server

TITLE:	Quick Steps for Upgrading the PDM Server
DATE:	September 2020
SUBJECT:	PDM Server Upgrade
ABSTRACT:	Step-by-step overview of the process to upgrade the PDM server components, and license manager to a new service pack, or year version



This guide is written for SOLIDWORKS PDM Standard and Professional 2015 and later versions. For earlier versions, please see the install guide for that year version [here](#).

This guide covers the upgrade of the PDM archive server, database server service, and client all installed on the same server system. It does not cover upgrading the PDM Web components, or an individual client installation.

Hawk Ridge Systems highly recommends taking a moment before installing SOLIDWORKS components to check that your system is ready to load the new software. First, ensure your system meets minimum system requirements for the components you will be installing. Also, confirm that the hard drive has enough space to have at least 15% free space after the full installation.

Before upgrading, we highly recommend you make a backup of your vault. For instructions, please see our [Backup and Restore](#) guide. We also suggest checking in all files to make sure the latest versions of all files are on the server when the backups are made.

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## Before upgrade

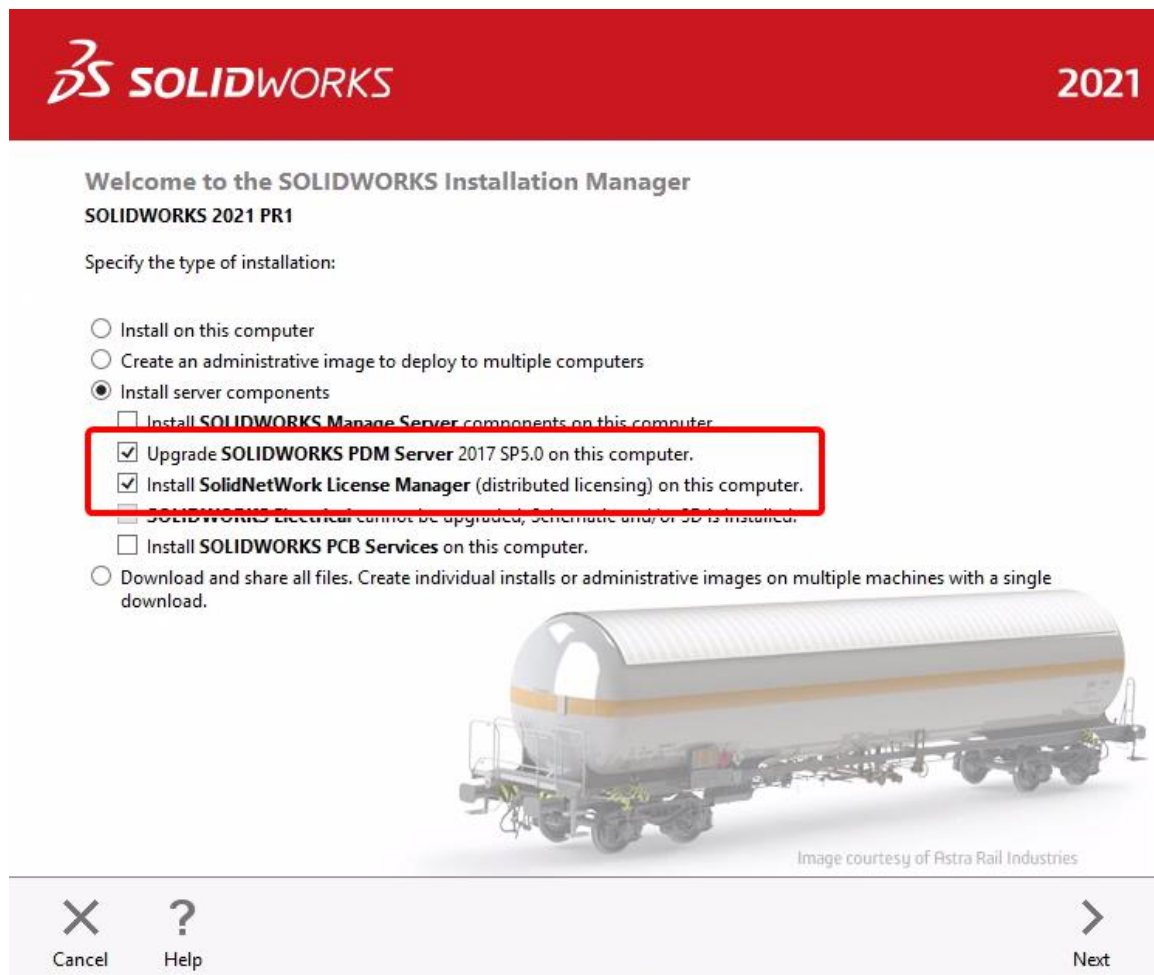
You will need the following information before starting the upgrade process.

- The name of the server hosting the SQL database. If the database is running on a named instance of SQL, you will also need the instance name.
- The login information for the account used to access the SQL database. Typically, this will be the SA account, but can be any SQL account with db\_owner permissions to the existing PDM databases.


# Upgrade

1. To begin, run the setup.exe from your SOLIDWORKS installation files or DVD. Disregard any messages suggesting you need a computer restart by pressing OK.
2. When the Installation Manager is open, select the Install server components radio button and select to upgrade the PDM server.

\*If the SolidNetWork License Manager is installed on the same system, it should also be selected to update at the same time. If it's running on a separate server, it will need to be updated to the same




- Next, to configure the PDM server options for the upgrade, select the change link on the Summary section.
  - If you're also upgrading the SolidNetWork License Manager please verify all of your network serial numbers are present and correct. If not, select the change button to modify them.


2021

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### Summary

▼ SOLIDWORKS PDM Server [Change](#) 

Server Product:	SOLIDWORKS PDM Professional
Installation Location:	C:\Program Files\SOLIDWORKS Corp\SOLIDWORKS PDM\
Features to install:	Archive Server, Database Server, Client
SQL Server:	Configuration Required

▼ SolidNetWork License Manager [Change](#) 



Installation location:	C:\Program...LIDWORKS Corp\SolidNetWork License Manager
Serial number(s):	



▼ Download Options [Change](#) 

Operation:	Install only (do not download)
Background downloader:	Do not use

I accept the terms of the SOLIDWORKS [License Agreement](#)

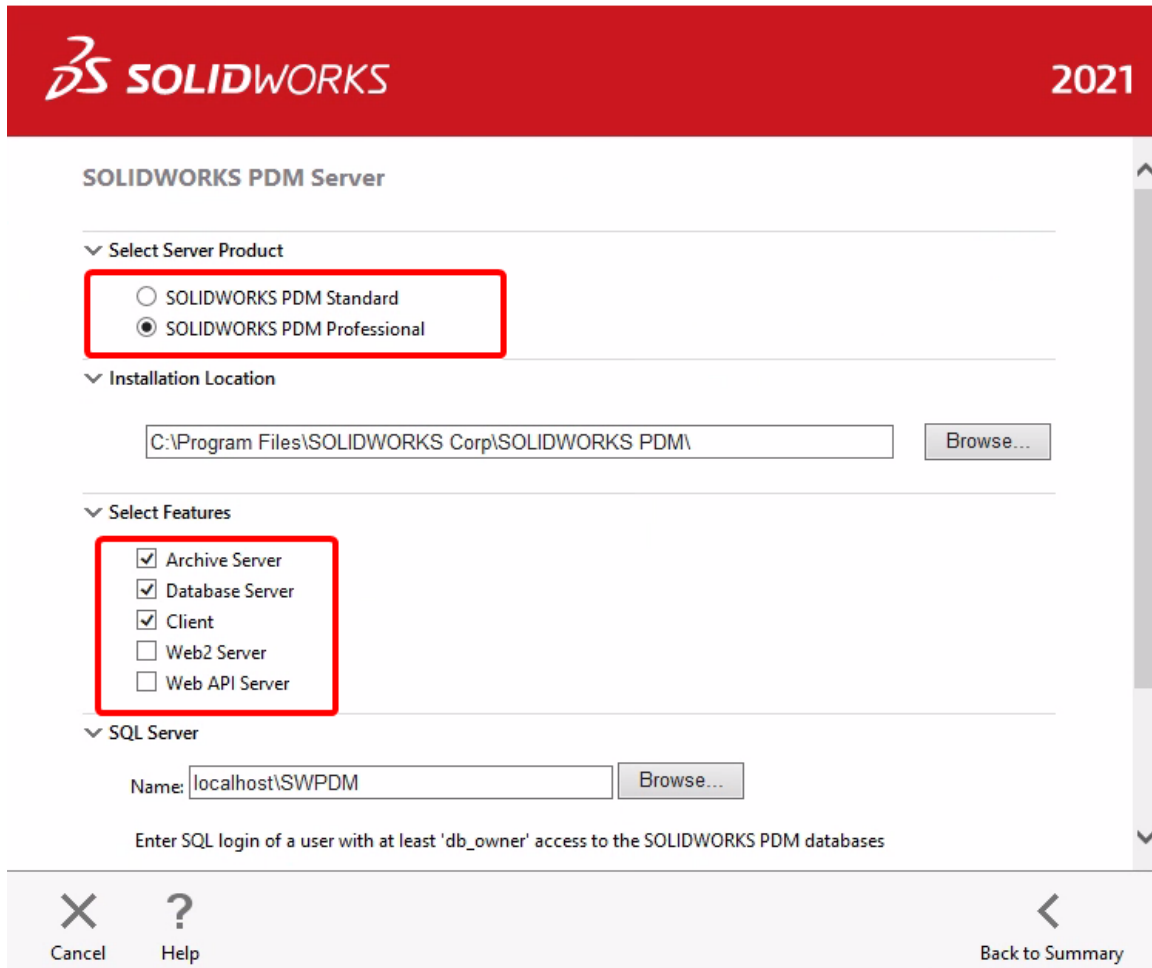
**Estimated installation size: 1.0 GB**

 Cancel Help

 Back Install Now

4. On the PDM Server configuration page, select the following:
- The PDM Server version (Professional or Standard) you want to install
  - Make sure the Archive Server and Database Server are selected

Note: We recommend having the PDM client installed on the PDM server. This allows access to the PDM administration tool on the server which is useful for testing and diagnosing issues.



**SOLIDWORKS** 2021

**SOLIDWORKS PDM Server**

▼ Select Server Product

SOLIDWORKS PDM Standard

SOLIDWORKS PDM Professional

▼ Installation Location

C:\Program Files\SOLIDWORKS Corp\SOLIDWORKS PDM\

▼ Select Features

Archive Server

Database Server

Client

Web2 Server

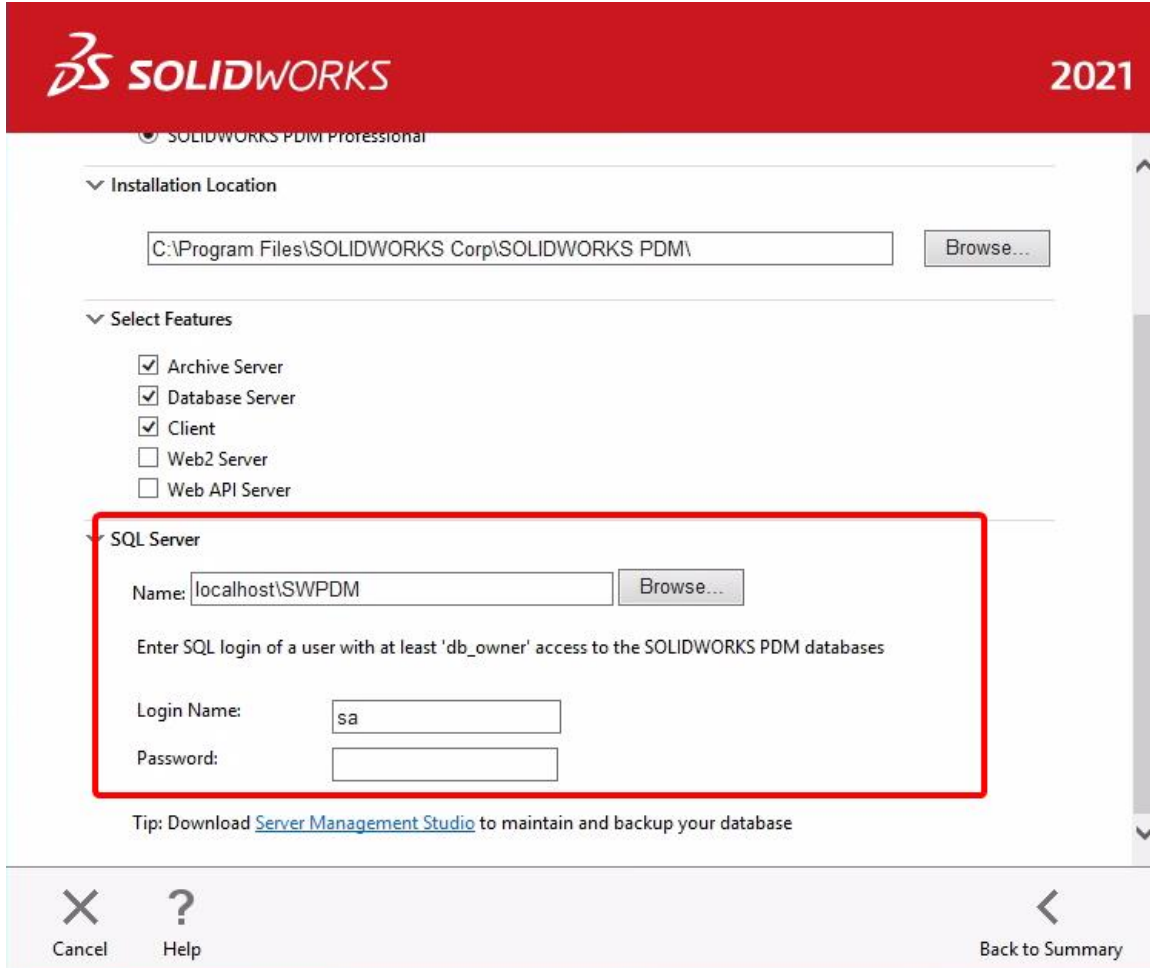
Web API Server

▼ SQL Server

Name: localhost\SWPDM

Enter SQL login of a user with at least 'db\_owner' access to the SOLIDWORKS PDM databases

- Input your SQL server location and login information.



**SOLIDWORKS** 2021

SOLIDWORKS PDM Professional

Installation Location  
C:\Program Files\SOLIDWORKS Corp\SOLIDWORKS PDM\ Browse...

Select Features

- Archive Server
- Database Server
- Client
- Web2 Server
- Web API Server

SQL Server

Name: localhost\SWPDM Browse...

Enter SQL login of a user with at least 'db\_owner' access to the SOLIDWORKS PDM databases

Login Name: sa

Password:


Tip: Download [Server Management Studio](#) to maintain and backup your database

Cancel Help Back to Summary

5. Once this information is entered, select the back to summary button. If the information above is entered incorrectly, you will be presented with an error message.


Once the PDM server has been configured we'll notice that the SQL server is listed and the "configuration required" message is gone.

6. Select to accept the license agreement to proceed with the installation.


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### Summary

▼ SOLIDWORKS PDM Server [Change](#) 

Server Product:	SOLIDWORKS PDM Professional
Installation Location:	C:\Program Files\SOLIDWORKS Corp\SOLIDWORKS PDM\
Features to install:	Archive Server, Database Server, Client
SQL Server:	localhost\SWPDM

▼ SolidNetWork License Manager [Change](#) 

Installation location:	C:\Program...LIDWORKS Corp\SolidNetWork License Manager
Serial number(s):	[REDACTED]




▼ Download Options [Change](#) 


Operation:	Install only (do not download)
Background downloader:	Do not use

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I accept the terms of the SOLIDWORKS [License Agreement](#)

Estimated installation size: 1.0 GB

 Cancel Help Back

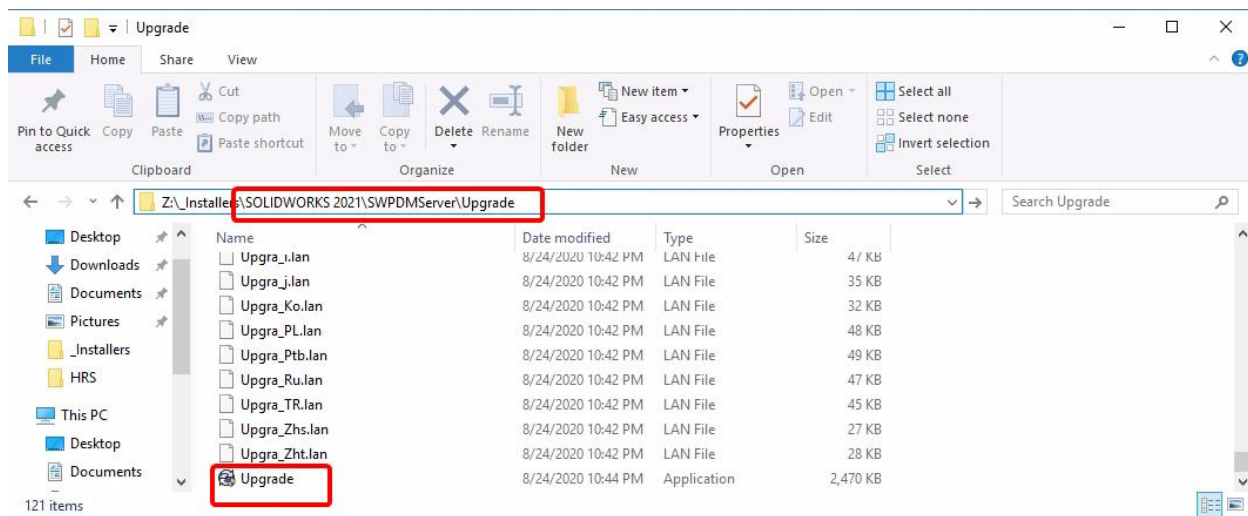
 Install Now

## SQL Database Upgrade

Once the installation is complete, you will need to upgrade the PDM SQL Databases to match our new server software versions.

1. Navigate to the SOLIDWORKS PDM installation files (this can be on the DVD or downloaded file location) and browse into the 'swpdmserver\Upgrade' subfolder
2. Run Upgrade.exe to start the database update wizard

Note: For this tool you will also need your SQL server location and login information.

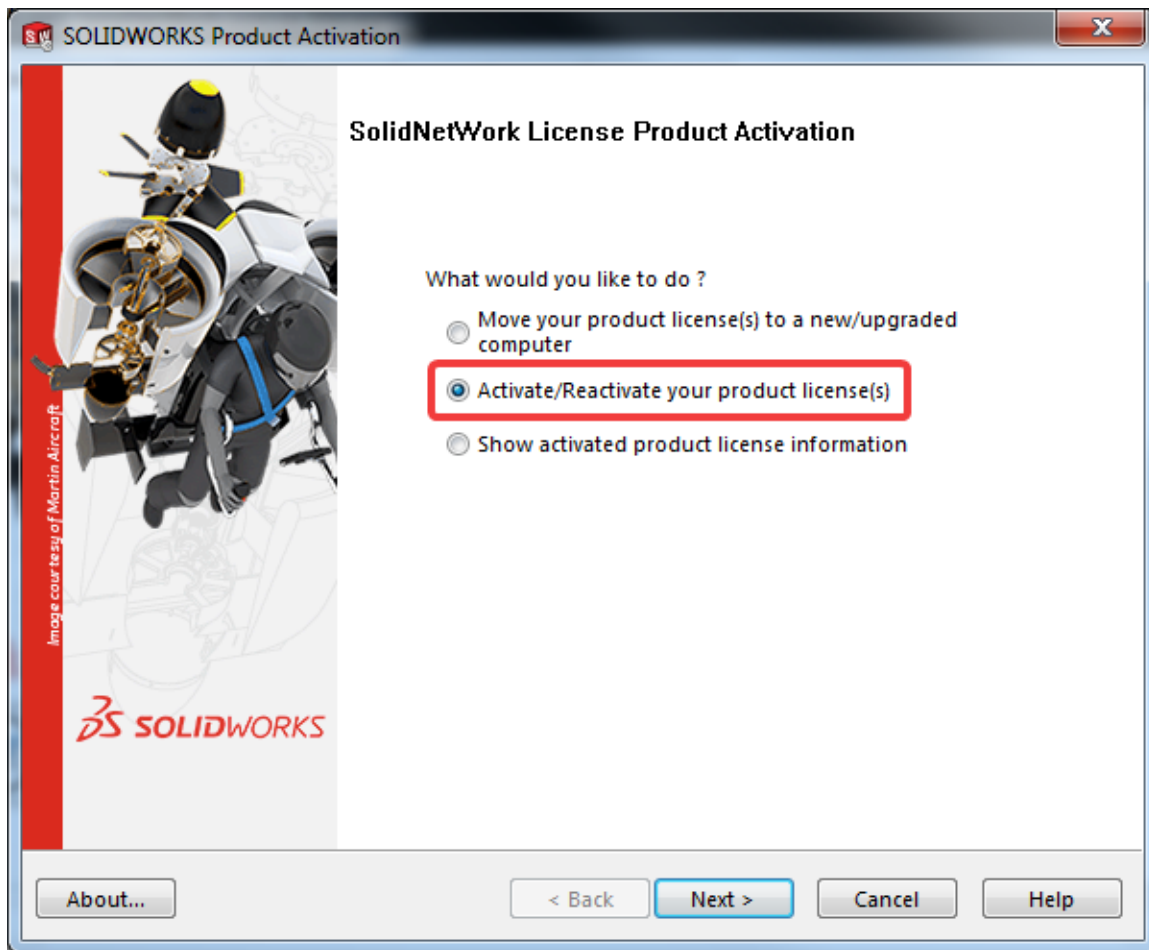




## Finish the License Manager Upgrade

After the License Manager installation is complete, you will need to activate the licenses at the version you have installed.

1. Launch the SolidNetwork License Manager from the Start menu
2. On the Server Administration tab, click Modify
3. Select the 'Activate/Reactivate your product license(s)' radio button



4. Follow the wizard to complete the activation. For more instructions, see our full guide for installing the License Manager [here](#).

## Testing for Errors

Once the upgrade utility is complete, please test logging into your PDM server, preferably on the server itself with the PDM administration tool that was installed with the PDM client.

If you are able to login without error then the upgrade process was successful. At this point, please have a PDM user test their local vault view connection to the PDM server.

Note: All PDM client computers need their PDM client to be the same software version as the PDM server. For this example the PDM server was upgraded to PDM 2017 SP0, so any PDM clients would need to be upgraded to SOLIDWORKS/PDM 2017 SP0

If there are errors logging into the PDM Server administration tool on the PDM server itself, please note the error. If the error states that the database version is incorrect then the issue is likely with the PDM SQL Database upgrade utility.

Otherwise, please contact Hawk Ridge Systems for support with the error message.

