

How To Install PDM Standard and Professional Client 2022

TITLE:	How To Install PDM Standard and Professional Client 2022
DATE:	September 2021
SUBJECT:	PDM client install
ABSTRACT:	Comprehensive guide on installing the PDM client for SOLIDWORKS 2022



This guide is written for users of both SOLIDWORKS PDM Standard and Professional. This guide cannot be used to install versions before 2016 of PDM because the process has changed. For more information about installing earlier versions of our PDM software, please see our <u>Help Center</u>.

A SOLIDWORKS PDM vault is used to manage documents. A SOLIDWORKS PDM Client is the software installed on a computer that will allow access to the vault. After the client software is installed, you can create a local vault view to connect and access documents located in the vault.

This is not a troubleshooting guide. If you have any technical issues with SOLIDWORKS, please contact <u>Hawk Ridge Systems technical support</u>.

This document is only to be distributed and used by Hawk Ridge Systems customers. Any other use is prohibited.

©2021 Hawk Ridge Systems

USA: 1.877.266.4469



Contents

Before Installation2	
PDM Client Installation	
Adding The Vault View7	

Before Installation

Hawk Ridge Systems highly recommends taking a moment before installing SOLIDWORKS and checking that you are ready to load your new software. First, check links to ensure <u>minimum system requirements</u> and <u>video card</u> compatibility are met. 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. Older versions of SOLIDWORKS cannot open files from newer versions.

Starting with PDM 2017 and continuing with PDM 2022, client and server installation must be versions of the same release year. This is a change from previous years, which required that the client and server installation were the same year AND service pack. Verify that the PDM server components are the 2022 version before proceeding with the 2022 PDM client installation.



PDM Client Installation

- 1. From your SOLIDWORKS DVD or full download, double-click on Setup.exe.
- 2. Specify the "Install on this computer" option in the Installation Manager and press "Next".

S SOLIDWORKS	2022
Welcome to the SOLIDWORKS Installation N SOLIDWORKS 2022 PR1	Manager
Specify the type of installation:	
 Install on this computer Create an administrative image to deploy to multiple comp 	puters
Install server components	
download.	
x Verm	Image used with permission. © 2020 Vermeer Carporatio
< ?	>
icel Help	Next

3. Installing the PDM Client does not require a serial number for either PDM Standard or PDM Professional. Press "Next" to continue to the "Summary" page.



4. On the Summary page, select "Change" next to the "Products" section.

S solidworks		2022
Summary This is a new installation of 2022 PR1.		^
✓ Products	Change 🖉	
SOLIDWORKS: PhotoView 360, SOLIDWORKS Toolbox, SOLIC CircuitWorks, SOLIDWORKS Costing, Design Checker, Examp SOLIDWORKS Languages: English eDrawings SOLIDWORKS File Utilities SOLIDWORKS File Utilities SOLIDWORKS Flastics SOLIDWORKS Electrical Electrical Client (SOLIDWORKS Elec Annification Data)	le Files, Manuals, Help Files	
> Download Options	Change 🖋	
> Installation Location	Change 🥔	
✓ Toolbox/Hole Wizard Options	Change 🏈	
Previous Toolbox detected. Select Installation Method.		±
> Electrical Options	Change 🥒	More
☐ I accept the terms of the SOLIDWORKS License Agreement	Estimated installation size: 14 GE Estimated download size: 5.8 GE	
X ?	< 4	1
ncel Help	Back Download a	ind Install

5. Select "PDM Client" from the SOLIDWORKS Products list, and then "Next". Note that other products may be installed at the same time as the PDM client.

solidworks		20
Product Selection		
Select products to install.		
SOLIDWORKS Products		
SOLIDWORKS Languages		
eDrawings (701 MB)		
SOLIDWORKS File Utilities (30 MB)		
PV360 Network Client (524 MB)		
SOLIDWORKS Composer Player (543 MB)		
SOLIDWORKS PCB Viewer (1.6 GB)		
SOLIDWORKS Manage Client (667 MB)		
SOLIDWORKS PDM Client (862 MB)		
3DEXPERIENCE Marketplace (1 MB)		
API Tools		
Required system components will be installed (149 MB): Check For Updates, Microsoft C++ 2019	~	
Install SOLIDWORKS PDM Client 2022 PR1 SOLIDWORKS PDM is data management software. This installs the client to access and administer SOLID PDM vault(s).	WORKS	
Estimated space required for installatio Does not include the size of any do		
X ?	<	>
ancel Help	Back	Nex



6. Select "Change" next to the "SOLIDWORKS PDM Options" section.

Summary This is a new installation of 2	022 PR1.	
✓ Products		Change 🧬
SOLIDWORKS PDM C	lient	/
	stem components will be installed (149 MB): Check ributable (x64) and Microsoft .NET Framework 4.8.	k For Updates, Microsoft C++
> Download Options Back	kground Downloader is on 🛈	Change 🥖
> Installation Location		Change 🧬
V SOLIDWORKS PDM Opti	ons	Change 🖉
	SOLIDWORKS PDM Professional	
Product:		
	SOLIDWORKS PDM CAD Editor	
Product:	SOLIDWORKS PDM CAD Editor	

7. Specify whether you would like to install the PDM Standard or PDM Professional Package, the client type you would like to install, and any necessary add-ins from the list. Press "Back to Summary".

S SOLIDWORKS	20
SOLIDWORKS PDM Client Options	
✓ Select your PDM Product	
SOLIDWORKS PDM Standard	
Select this if you have licenses for SOLIDWORKS PDM Standard SOLIDWORKS PDM Professional	
Select this if you have licenses for SOLIDWORKS PDM Professional or SOLIDWORKS Manage	
✓ Select your PDM Client Type	
SOLIDWORKS PDM CAD Editor	
SOLIDWORKS PDM Contributor	
SOLIDWORKS PDM Viewer	
✓ Select your Add-ins	
Microsoft Office Integration	
SOLIDWORKS Add-in	
DraftSight Add-in	
X ?	<
ancel Help	Back to Summ



8. Accept the terms and conditions and click "Download and Install" to begin the installation.

Zs	SOLID WORKS		2022
	nmary is a new installation of 2022 PR1.		^
∨ Pr	roducts	<u>Change</u> 🥖	
	CircuitWorks, SOLIDWORKS Costing, D SOLIDWORKS Languages: English eDrawings SOLIDWORKS File Utilities SOLIDWORKS Plastics	WORKS Toolbox, SOLIDWORKS Routing, ScanTo3D, TolAnalyst, esign Checker, Example Files, Manuals, Help Files ent (SOLIDWORKS Electrical 3D), Electrical Server (Collaborative Server,	
> D	ownload Options	Change 🚀	
> In	stallation Location	Change 🤌	
√ Te	oolbox/Hole Wizard Options	<u>Change</u> 🖉	
	Previous Toolbox detected. Select Insta	llation Method.	±
> El	ectrical Options	<u>Change</u> 🖉	More
	I accept the terms of the SOLIDWORKS License Agreement	Estimated installation size: 14 GI Estimated download size: 5.8 GI	-
X Cancel	? Help	Back Download	, not install



Adding The Vault View

Once the Client component has been installed, a "vault view" will need to be created in order to access the files in the vault. To do this:

- 1. Go to Start > All Programs > SOLIDWORKS PDM > View Setup
- 2. Select Next, select the appropriate Archive server, and Next.

 Select servers Select archive server(s) Select one or more archive servers that contain the vault(s) you want to attach from the list below and press Next. 				×	
Name BASEWIN7 MTV-JAMES MTV-DANIE	Status Not connected Connected Not connected	Port 3030 3030 3030	Version 16.03.0064 17.02.0063 17.04.0083	Type Broadcast Broadcast Broadcast	
Add	Update		< Back	Next >	Cancel

Note that if your Archive server is not shown in the list, you may have to manually type it in using the "Add" button. Please see your PDM administrator if you are not sure which server to add.

3. Select your vault and click Next.



- 4. Specify the location for the vault view, and whether you would like to install the vault view for only your Windows profile, or for all Windows profiles on this computer.
 - a. Unless you have different users sharing the same machine, it is usually recommended to select the "For all users" option.
 - b. It is recommended to place the vault on or close to the root directory of a drive, to avoid potential issues with file path length.

Select location	×
Select location Choose how you want to attach your file vault views and press Next to continue.	
Attach location	
The file vault views will be created in the following location:	
Browse	
Attach type	
Make the local views accessible:	
Only for me	
 For all users on this computer (requires local administrator rights) 	
< Back Next > Ca	ancel

5. Click Next and then Finish.