

How To Upgrade The PDM Server 2022

TITLE:	How To Upgrade The PDM Server 2022
DATE:	September 2021
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 <u>here</u>.

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 <u>Backup and Restore</u> 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

3 S SOLIDWORKS	2022
Welcome to the SOLIDWORKS Installation Manager	
SOLIDWORKS 2022	
Specify the type of installation:	
O Install on this computer	
O Create an administrative image to deploy to multiple computers	
Install server components	
Install SOLIDWORKS Manage Server components on this computer.	
Upgrade SOLIDWORKS PDM Server 2020 SP5.0 on this computer.	
Install SolidNetWork License Manager (distributed licensing) on this computer.	
Upgrade SOLIDWORKS Electrical 2020 SP5.0 on this computer.	
Upgrade SOLIDWORKS PCB Services 2020 SP5.0 on this computer.	
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Image used with permit	ssion. ©2020 Vermeer Corporation
X ?	>
Cancel Help	Next



- 3. 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 that all your network serial numbers are present and correct. If not, select the change button to modify them.

Summary		
✓ SOLIDWORKS PDM Server		Change 🤌
Server Product:	SOLIDWORKS PDM Professional	
Installation Location:	C:\Program Files\SOLIDWORKS Corp\SOLIDWORKS PDM\	8
Features to install:	Archive Server, Database Server, Client	
SQL Server:	Configuration Required	
✓ SolidNetWork License Manager		Change 🏈
Installation location:	C:\ProgramLIDWORKS Corp\SolidNetWork License Man	ager
Serial number(s):		
✓ Download Options		Change 🌽
Operation:	Install only (do not download)	
Background downloader:	Do not use	
I accept the terms of the SOLIE License Agreement	WORKS Estimated inst	allation size: 792 MB



- 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.

35 SOLID WORKS	2	022
SOLIDWORKS PDM Server		
 Select Server Product SOLIDWORKS PDM Standard SOLIDWORKS PDM Professional 		
Installation Location C:\Program Files\SOLIDWORKS Corp\SOLID\	WORKS PDM\ Browse	
 ✓ Select Features ✓ Archive Server ✓ Database Server ✓ Client Web2 Server Web API Server 		
V SQL Server		
Name: localhost\SWPDM	cess to the SOLIDWORKS PDM databases	
x?	Back to Surr	nmary



• Input your SQL server location and login information.

SOLIDWORKS	IVI Professional	
\checkmark Installation Location		
C:\Program File	SOLIDWORKS Corp\SOLIDWORKS PDM\	Browse
✓ Select Features	82	
Archive Server		
✓ Database Serve		
Client Web2 Server		
Web API Server		
✓ SQL Server		
Name: localhost\S	NPDM Browse	
Enter SQL login of	user with at least 'db_owner' access to the SOLIDWORKS	PDM databases
Login Name:	sa	
Password:		
	Management Studio to maintain and backup your data	13Ce

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.

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:\ProgramLIDWORKS Corp\SolidNetWork License Manag	ler
Serial number(s):		
✓ Download Options		Change 🥖
Operation:	Install only (do not download)	
Background downloader:	Future service packs	
✓ I accept the terms of the SOLIC License Agreement	WORKS Estimated install	ation size: 792 ME



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.

I Image: Second state File Home	View						<u></u>	□ × ^ (
	6 Cut Copy path Paste shortcut	Move to * Copy to * Copy Copy to *	New New folder New	access *	openties Open	Select all Select none Invert selection Select		
← → × ↑ 📙 Z:_Ins	taller s\SOLIDWORKS	2021\SWPDMServer\Upgrade				~ >	Search Upgrade	م
Desktop * ^ Downloads * Documents * Pictures * HRS This PC Desktop	Name Upgra_i.lan Upgra_i.lan Upgra_Ko.lan Upgra_PL.lan Upgra_Ptb.lan Upgra_Ru.lan Upgra_TR.lan Upgra_Zht.lan	8/ 8/ 8/ 8/ 8/ 8/ 8/ 8/ 8/ 8/	te modified 24/2020 10:42 PM 24/2020 10:42 PM	Type LAN File LAN File LAN File LAN File LAN File LAN File LAN File LAN File	Size 4/1 351 481 491 471 471 471 277 281	KB KB KB KB KB KB		
Documents - 121 items	🚭 Upgrade		24/2020 10:44 PM	Application	2,470 1	KB		



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

SOLIDWORKS Product Act	tivation	×
	SolidNetWork License Product Activation What would you like to do ? Other your product license(s) to a new/upgraded computer Activate/Reactivate your product license(s) Other Show activated product license information	
About	< Back Next > Cancel H	felp

4. Follow the wizard to complete the activation. For more instructions, see our full guide for installing the License Manager <u>here</u>.



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 2022, so any PDM clients would need to be upgraded to SOLIDWORKS/PDM 2022.

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.

_ 🗆 🛛 2 SOLIDWORKS PDM Administration File View Help 8 1 1 1 1 1 9 7 7 9 Recently Used SOLIDWORKS PDM Administration 🛯 📭 Por-josephm x 😫 MicroMetl Test1 2 E Test1 👰 Local Settings 🐌 Group Policies 🌉 Log File Settings Web Servers User name: admin Log In 🔿

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