How To Upgrade PDM Server

TITLE:	How To Upgrade PDM Server
DATE:	September 2026
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 20XX and later versions. For earlier versions, please contact support.

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 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.

©2026 Hawk Ridge Systems

Contents

Before upgrade 2
Upgrade 2
SQL Database Upgrade 7
Finish the License Manager Upgrade 7
Testing for Errors 9

Before Upgrade

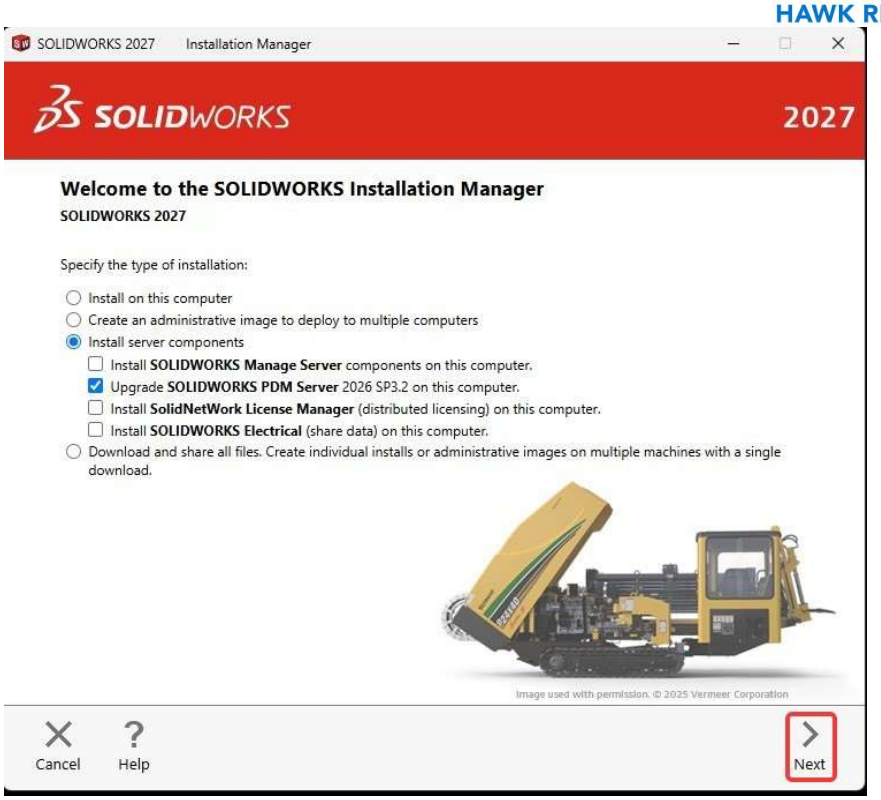
You will need the following information before starting the upgrade process.

- 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 that is 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.

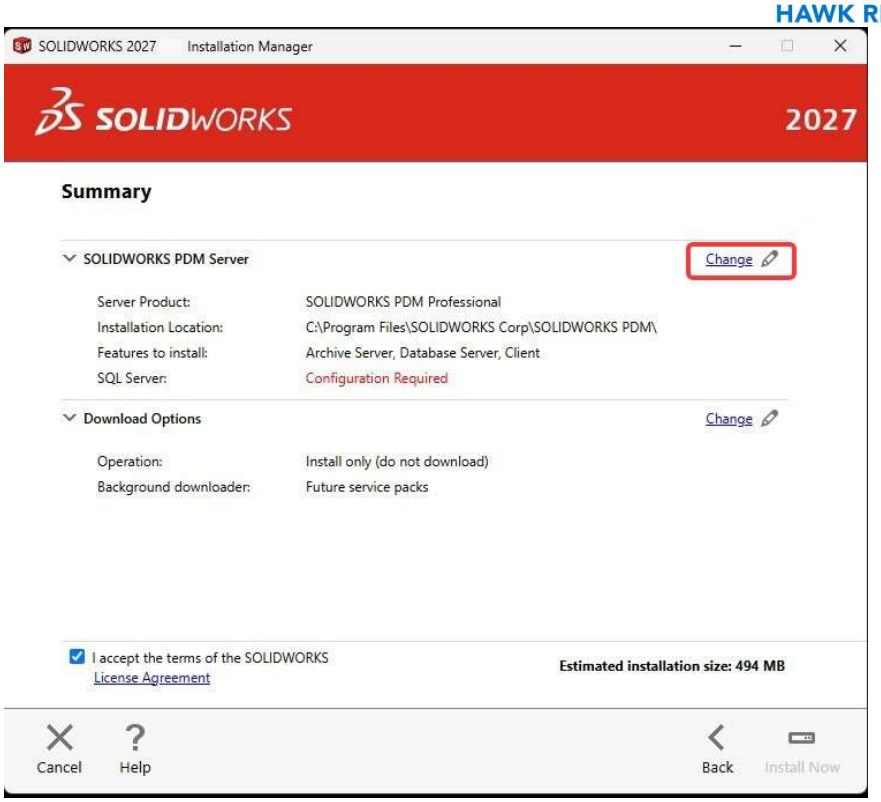
2. When the Installation Manager is open, select the Install server components radio button and select 'Next' to upgrade the PDM server.



Note: If the SolidNetWork License Manager is installed on the same system, it should also be selected to upgrade at the same time. If it is running on a separate server, it will need to be upgraded to the same version.

3. Next, to configure the PDM server options for the upgrade, select the change link on the Summary section.

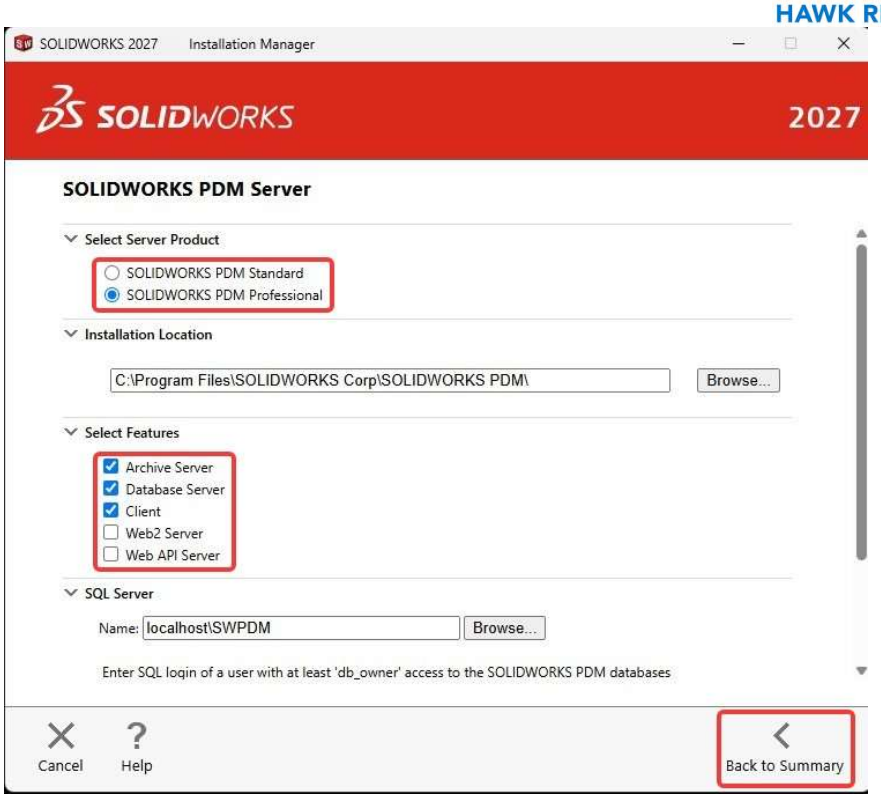
    - If you are also upgrading the SolidNetWork License Manager, please verify that all your network serial numbers are present and correct. If not, select the change button to modify them.



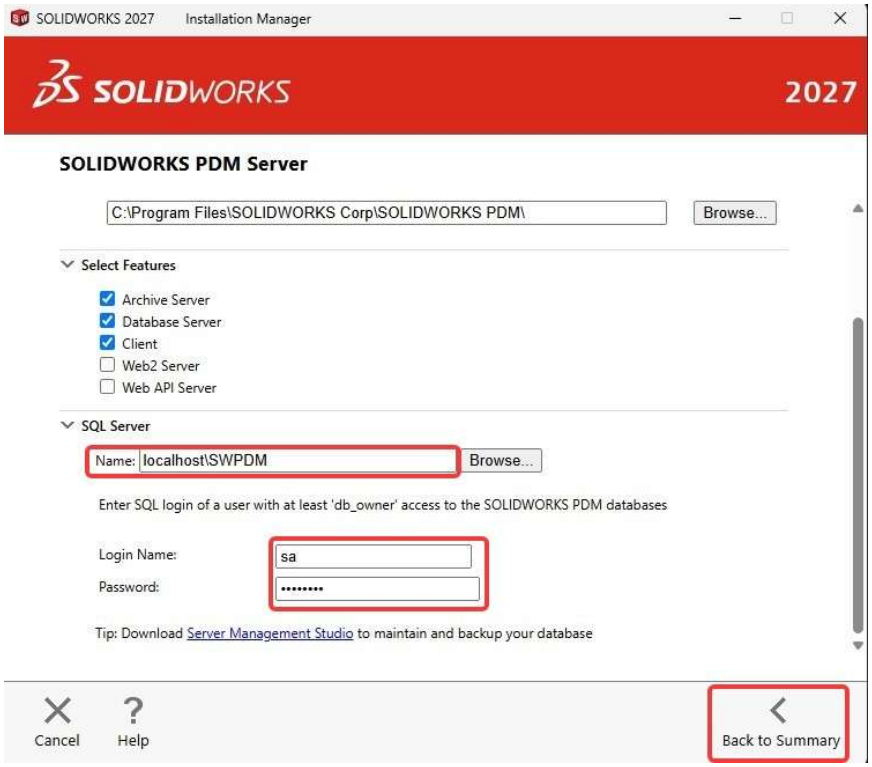
4. On the PDM Server configuration page, select the following:

   - The PDM Server version (Professional or Standard) you want to install.
   - Make sure that 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. When installing PDM Web2 Server, PDM client installation is required.



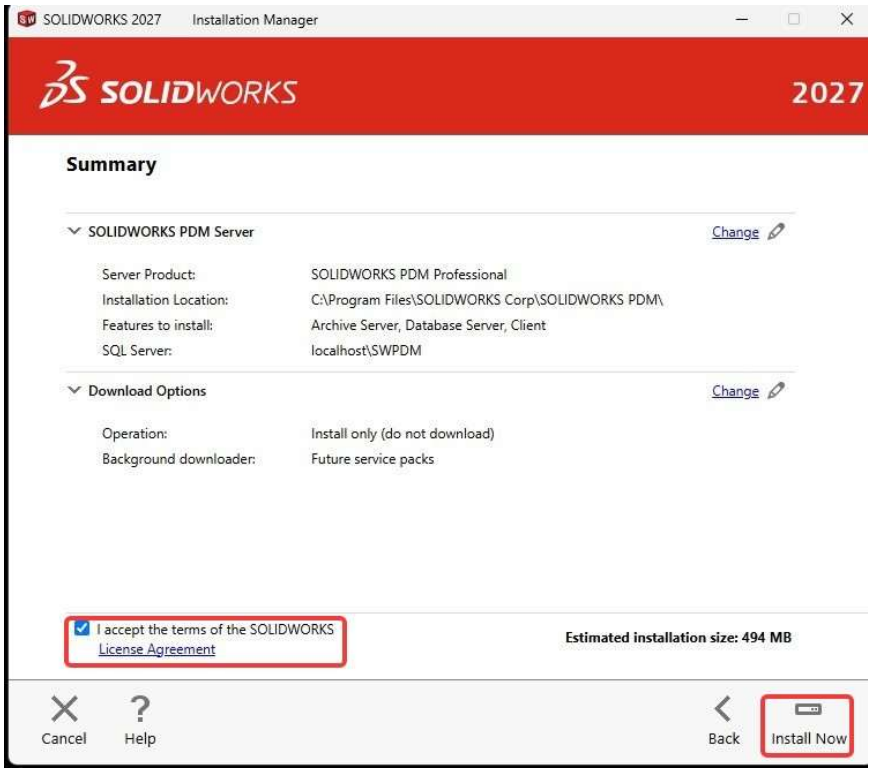
- Input your SQL server location and login information.



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.

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

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



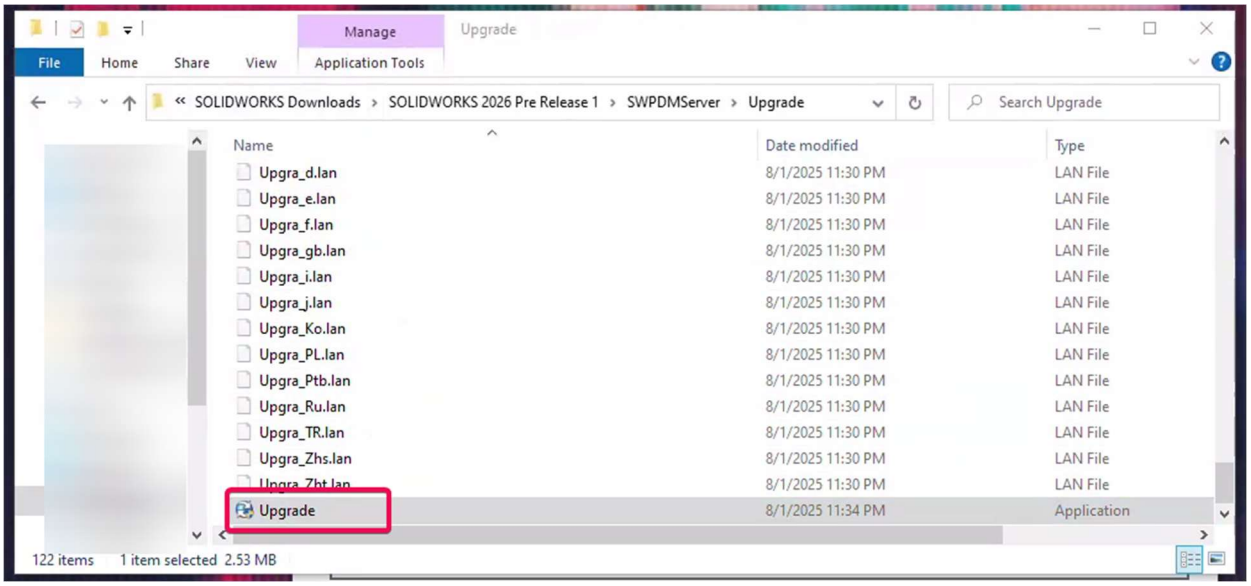
SQL Database Upgrade

Once the installation is complete, you will need to upgrade the PDM SQL Databases to match your 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.



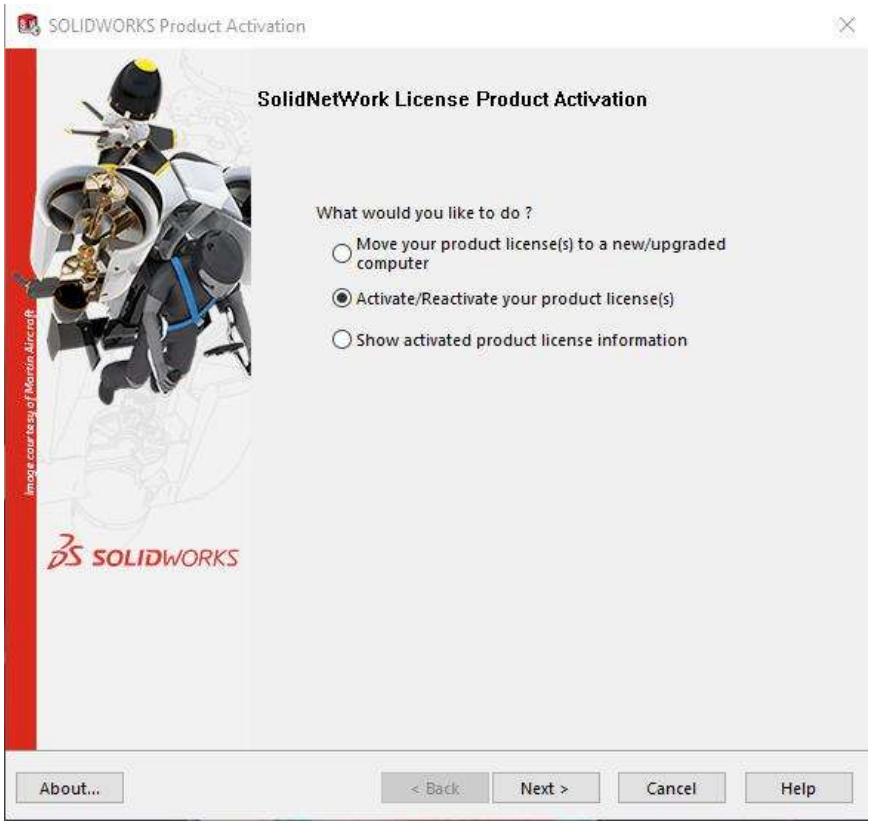
Finish the License Manager Upgrade

After the License Manager installation is complete, you will need to activate the licenses on the version you 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

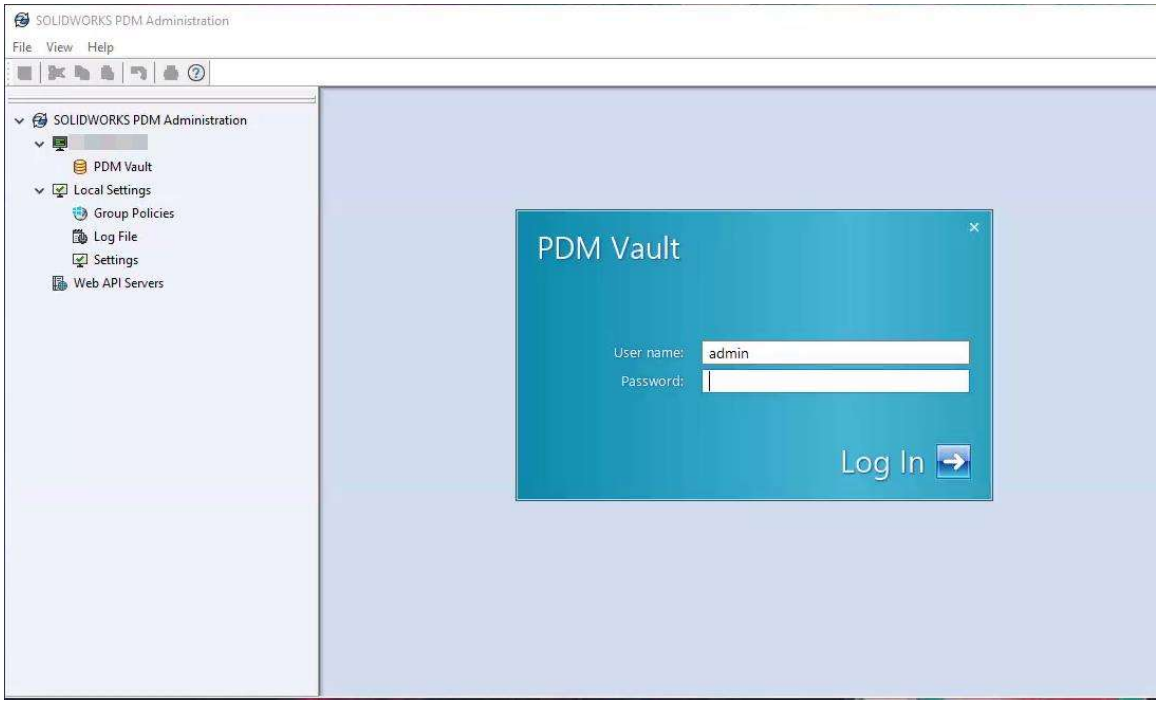
Once the upgrade utility is complete, please test logging into your PDM server, preferably on the server itself with the PDM administration tool that was installed with the PDM client.

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

Note: All Windows client machines need their PDM clients to have the same software version as the PDM server. For example, the PDM server was upgraded to PDM 2026, any PDM clients would also need to be upgraded to SOLIDWORKS/PDM 2026.

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 with the PDM SQL Database upgrade utility.

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



For additional support, existing customers can submit a ticket or new customers can contact Hawk Ridge Systems.