Upgrading SOLIDWORKS/PDM On Your Own?

Please consider the plan below. This is the process DesignPoint uses and recommends to ensure a successful upgrade.

**Testing**

1. Make sure that your environment meets the system requirements for the version of the software you are upgrading to.
   

2. Build a test environment and use it for a few weeks.
   a. Are your workflows working correctly?
   b. Are your add-ins doing what you expected?
   c. Are your data cards displaying the correct information?
   d. Are SOLIDWORKS and PDM performing (speed) well?

For instructions on how to restore a production environment into a different system, please follow solution S-017826 from the SOLIDWORKS Knowledge base.

**It's time for the production upgrade...**

3. Upgrade your SNL first.
   a. How to upgrade your SolidNetwork License Manager (SNL) Server:
      
      [https://www.dropbox.com/s/3f5q1ph2s8908p1/Upgrade%20Network%20License%20Version.pdf?dl=0](https://www.dropbox.com/s/3f5q1ph2s8908p1/Upgrade%20Network%20License%20Version.pdf?dl=0)
   b. Make sure you re-activate the licenses in your SNL server.

4. Upgrade PDM before your SOLIDWORKS CAD. Follow instructions from Section 11 of the PDM Installation Guide

   [https://files.solidworks.com/Supportfiles/PDMWorks_Ent_Installation/2019/English/Installation%20Guide.pdf](https://files.solidworks.com/Supportfiles/PDMWorks_Ent_Installation/2019/English/Installation%20Guide.pdf) (Note: This link is for the 2019 Admin guide only – please review the admin guide specific to the version you have installed)

5. Once the PDM server components are upgraded, upgrade one client machine and then upgrade your toolbox, following the instructions from your PDM Installation Guide.

6. Upgrade SOLIDWORKS CAD clients

   a. The CAD machines don’t have to be upgraded the same day that PDM is upgraded, so consider this in your plan.
b. If you have many client machines to upgrade, you should consider building an Admin Image to automate this process. (we suggest that you test it on a few clients prior to your production upgrade)

If at any point you have questions or concerns, please don’t hesitate to reach our support line at (610) 355-0551 x3. We want to make sure you have all the resources you need in order to perform a successful upgrade.

Additionally, you may want to consider taking our SW/PDM Upgrade Training course. This will give you exposure to this process and will build your confidence for when you have to do this on your own.