# SOLIDWORKS Installation Roadmap

When installing SOLIDWORKS for the first-time or updating to a new software version, there are several things to consider to ensure your installation goes smoothly. We've created this guide to help you identify potential issues and avoid common mistakes to ensure your install process goes smoothly. Of course, if you run into problems, our experts are available to help troubleshoot any issues along the way. Our Technical Support staff can be reached at (800) 454-2233.

Prior to Install

Check to see if your system has the required hardware. Every SOLIDWORKS version has its own hardware requirements. Below is a list of key items:

- Is your PC or Laptop a workstation?
    - » The software runs best on a SOLIDWORKS certified workstation.
    - » Download our current Hardware Recommendations for SOLIDWORKS at bit.ly/SW-Hardware.

- Which video card and video driver are you using?
    - » Both are very important. Many common crashes are due to the incorrect video driver.
        - GSC recommends NVIDIA Graphics Cards.
        - Visit http://www.solidworks.com/sw/support/videocardtesting.html for a current list of tested and certified drivers.

- How much computer RAM do you have?
    - » At a minimum, you should have 16 GB.
    - » For the best performance, GSC recommends 32+ GB.

- What is your operating system?
    - » Windows Professional (Not Windows Home version)
    - » Currently SOLIDWORKS supports (subject to change)
        - Windows 7 SP1 64-bit only
        - Windows 8.1 64-bit
        - Windows 10 64-bit

- Do you use any other software that works along with SOLIDWORKS?
    - » Ensure the software is compatible with the new version of SOLIDWORKS.
    - » Some third-party vendors do not stay current with each SOLIDWORKS release.
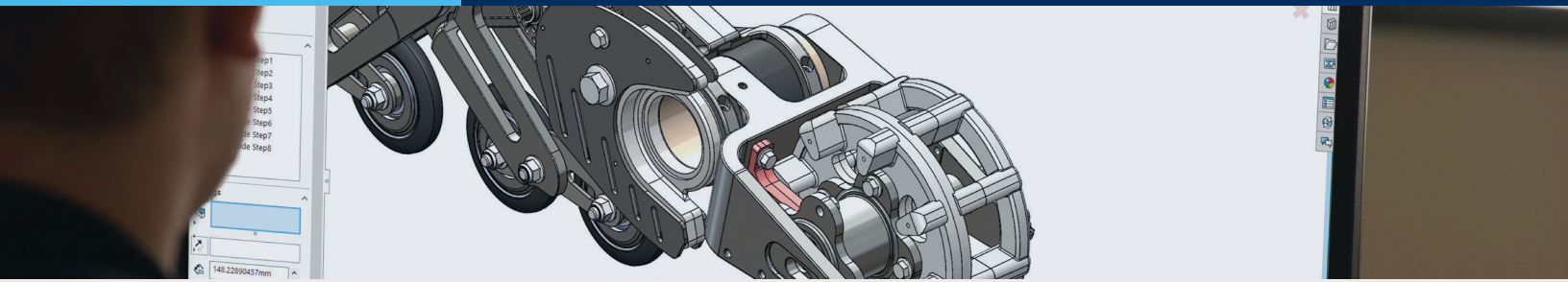
Ideal Install Environment

SOLIDWORKS integrates with and uses many different aspects of your operating system. Because of this, the install requires a few extra precautions to ensure all goes well.

- Administrative Rights
  - » Each SOLIDWORKS user should have administrative rights for their machine. SOLIDWORKS CAD stores a lot of information in the Windows registry and requires the capability to make changes to files and folders when needed.

- User Account Controls
  - » This is a Windows permission control measure, and often causes issues with installs, even when a user has the appropriate administrative permissions. This should be set to "Never Notify."
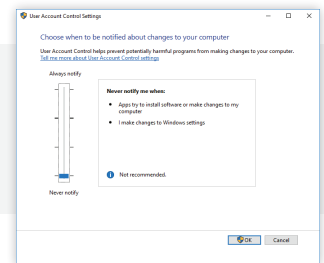
- Anti-Virus
  - » SOLIDWORKS maintains a list of <u>Anti-Virus applications</u> that should not cause issues during an install. Even if your software is listed, temporarily disabling the protection during installation can prevent many issues.

First-Time Install Considerations

First-time installs of SOLIDWORKS should be pretty straightforward.However, there are a few special circumstances that may change the process.

Multiple Versions

If needed, you can run multiple versions of SOLIDWORKS on a single machine. This can be helpful if you have a supplier using an older or newer version than you. Also, it doesn't require an additional license. However, if you do opt for a multiple-version environment, there are some precautions to take.

- Rename the default folders during install.

  When multiple versions are installed, the install directory is as follows: <install_directory>\ SOLIDWORKS (1), <install_directory>\SOLIDWORKS (2), etc. This can make it difficult to manage the versions you have on your machine.
  - » To make things eaiser, rename the install folder to include the year (e.g., C:\Program Files\ SOLIDWORKS Corp 2018. The folder name can be changed on the summary page of the installer.

- If you are using Toolbox, make the same changes to the SOLIDWORKS Toolbox directory.
  - » Typically C:\SOLIDWORKS Data. Change name to C:\SOLIDWORKS Data 2017

GSC

gsc-3d.com

800-454-2233

Test in a "Sandbox"

Every company is different. What you test and how much you test depends on your unique needs. At minimum, GSC recommends testing two or three larger assemblies in a "sandbox."

First, create a copy of the files you want to test; *it's very important to never test on current production files.* The best approach: install SOLIDWORKS on a test PC outside of production. We recommend the test PC and files be separated from the network to avoid any issues with accessing production files.

Once the test environment is set up, open the assemblies. Turn on "verification on rebuild," which can be found under performance settings. Then, press Ctrl-Q to force a rebuild of the model once it opens. Look for any errors in the model tree. If errors are found, determine if they are present in the release you used previously and test with "verification on rebuild" turned on. You will want to understand how the models update into the new version and if the model generates errors. Contact GSC support if you receive consistent errors in the new release that are not present in the current version.
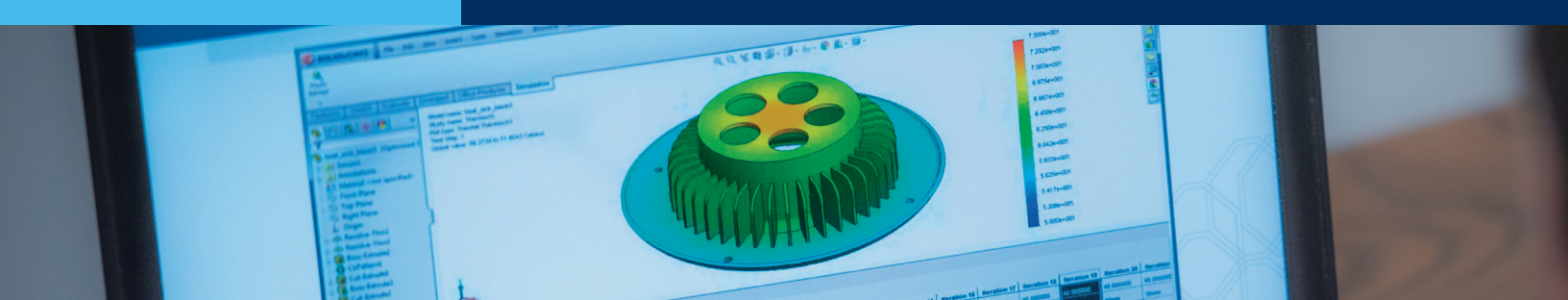
Software Install

When you are ready to roll out the new version, you will need to decide how it will be installed.

Obtaining the Software

- DVD - Yes, SOLIDWORKS still offers DVDs.

- Download (Best Method)
  - » Expect to download over 10GB of data, which requires a good internet connection.
    - For each PC, download and install at the same time.
    - **Best Option** Download entire DVD and use for every install.

Install Types

- Standalone
  - » Good for 10 or fewer installations.
  - » Each workstation will be installed individually.
  - » All options and settings are set when installed.

- Administrative Image
  - » Good for more than 10 installations.
  - » Install files stored on the server in a shared location.
  - » Settings and options are set for the image.
    - Can be defined by user or department.
  - » Install is launched from a shortcut.
    - Multiple installations can be completed simultaneously.
    - Files copied across network.

gsc-3d.com
800-454-2233

Install Options

- Upgrade
  - » Use if switching from version to version.
  - » Installs atop the existing installation to update the old version to the new version.
  - » When upgrading annually, we recommend completing an uninstall and reinstall every other year.

- Install
  - » Retains the old version to allow more than one version of the software on your system.
    - Best practices
      - Install the new version in its own folder. GSC recommends using the version number to help keep things organized.
      - Install Toolbox in its own location and upgrade separately, if needed.

- Uninstall and Reinstall
  - » Starts fresh by removing the old version.
    - Best practices
      - After uninstall, remove the folder structure from the old version.
      - Install the new version in its own folder and use the version number to help keep things organized.

Updating Files to New Version

Back up all your production files prior to upgrading to the new version. Do not skip this important step. The backup may take some time so scheduling this over a weekend may be the best option. Once backed up, there are a few options for completing the update.

- Open and Save
  - » Completed one at a time or as needed.
  - » Each time you open and save a file, it will update to the current version.
  - » This is a slow process and some files may get left behind.

- SOLIDWORKS Task Scheduler
  - » Bulk file update.
  - » Depending on the number of files, this can be a lengthy process.
  - » Multiple PCs can be used to update different folders to speed up the process.
  - » All files are updated and none are left behind.

- PDM
  - » Because of the vault, PDM must be used to complete the update. It will manage the file checkout and versions.
  - » Multiple PCs can be used to speed up the process.

gsc-3d.com

800-454-2233