

PDM Assisted Upgrade Options

The DASI Solutions PDM support team offers a variety of solutions to better assist customers with the upgrading of their Enterprise PDM Vault and client installations. The following document shows the different options available as well as a statement of work detailing what is covered by DASI during this process.

Normal Business Hours Options:

On-site assisted upgrade normal business hours - \$400 (up to 3 hours)

GoTo Meeting assisted upgrade normal business hours - \$200 (up to 3 hours)

After Business Hours Options:

After hours on-site assisted upgrade - \$1,000 (up to 3 hours)

After hours GoTo Meeting assisted upgrade - \$400 (up to 3 hours)

DASI PDM Upgrade SOW

- 1.) Back up the Conisio Master Database and the Customer Database.
- 2.) Download and copy the relative PDM Service Pack to the server.
- 3.) Run the upgrade on the Database and Archive Servers (may require a server reboot*)
- 4.) Run the upgrade on any Replicated Archive Servers (may require a server reboot*)
- 5.) Run the File Vault Database Upgrade
- 6.) Upgrade the SolidNetwork License Manager to the relative Service Pack.
- 7.) Activate the License Manager to serve new licenses.
- 8.) Assist in upgrading up to 5 local PDM clients (remaining clients are customer responsibility)
- 9.) The File Upgrade utility will not be run, as this ties up client workstations. It is recommended this be run after hours if desired.
- 10.) System verification – login as user and interact with files in a workflow.

**If DASI is conducting an online upgrade, the customer must have someone present to oversee the process and regain access in the event of a system reboot.*

Customer Pre-Upgrade Checklist – PDM

- 1.) Please make sure your servers and clients meets the minimum requirements for the new release. Please note that 32 bit operating systems are no longer supported.
<http://www.solidworks.com/sw/support/PDMSystemRequirements.html>
- 2.) Backup the Archive Data. This should be backed up on a regular basis anyway.
- 3.) Make sure you have a Windows Login, with ADMIN rights, to the SNL Server, DB Server and the Archive Server, and any replicated servers.
- 4.) Make sure you know the **Microsoft SQL** SA password (or whatever login was set to communicate between SQL and PDM) and the **PDM** Admin password.
- 5.) If planning to upgrade additional software, please download the desired Service Pack from the customer portal. If upgrading software on multiple machines, please launch the installation manager, and select Download only, and download all files needed to run on any computer.
- 8.) Please have all users check in all files the afternoon/evening before the upgrade is scheduled. And perform a valid backup of the database and archive.

If you run into any issues with any of these steps please contact us via Helpdesk by sending an email to services@dasi-solutions.com or via phone at 888-327-2974.