

## Autodesk® Vault Professional® SolidWorks Integration

# Installation

NOTE: Please see the relevant readme documentation for detail on supported environments for the specific software release including:

- Client install operating system
- Versions of SolidWorks supported (Including service pack)

The readme contains additional detail on install process and limitations that will assist during the initial install.

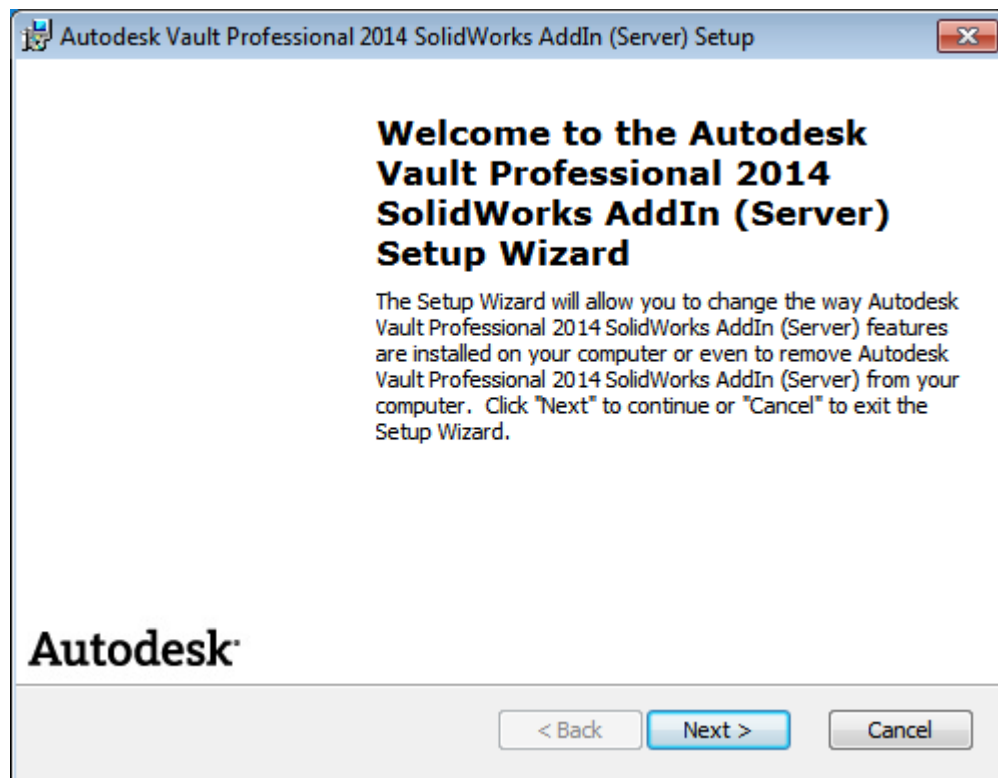
## Installing SWX Server

The SolidWorks server component is required to enable access from the Autodesk Vault Professional SolidWorks Client and indexing SolidWorks file properties.

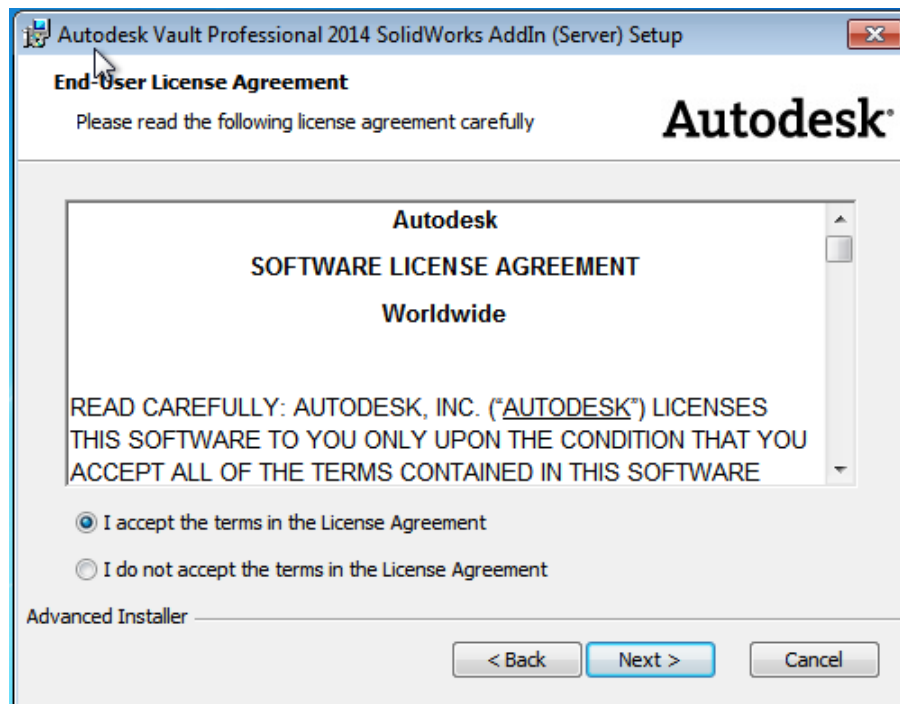
Installation of the SolidWorks server component is required on the machine hosting the Vault Server (ADMS).

### Install Process

Running the **Server** EXE, select your language setting (EN or DE) and you should see a welcome screen similar to the one pictured below:

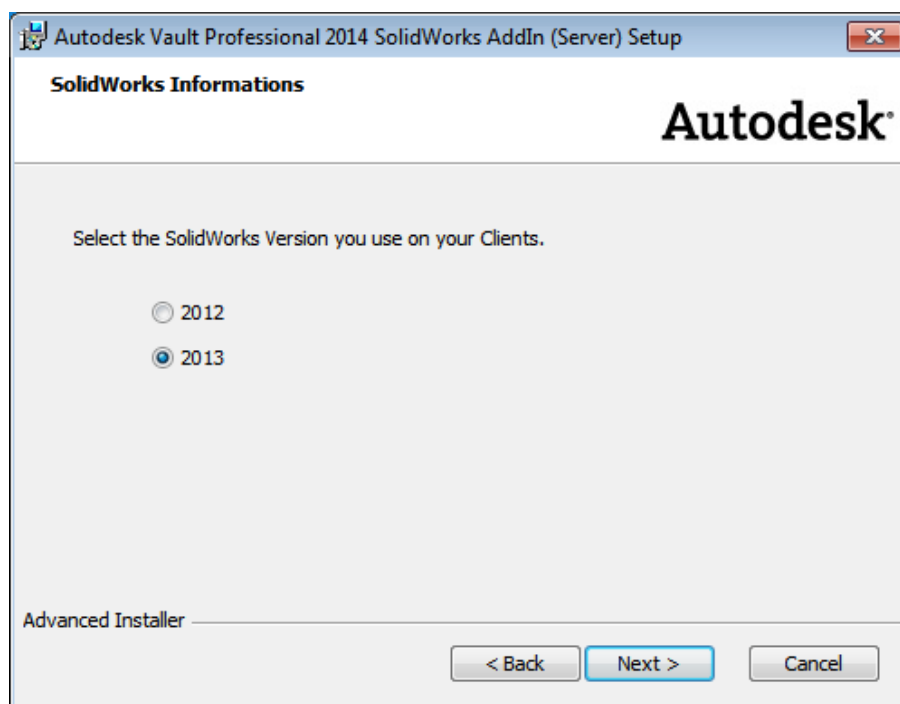


Select Next to bring up the license agreement. You will need to accept this to continue.



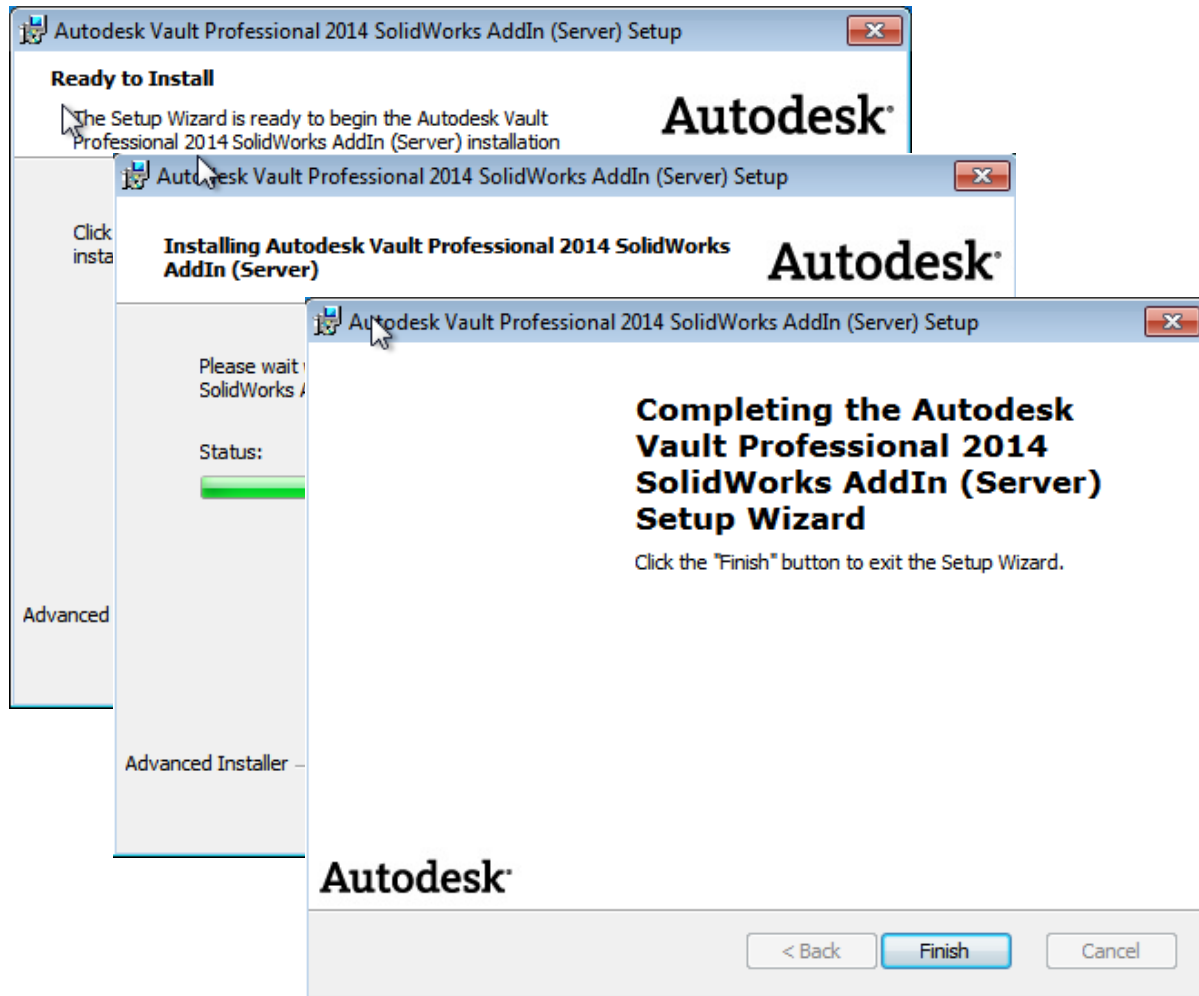
You will now need to select the Version of SolidWorks you intend to use with Vault – depending on the version of Autodesk Vault Professional you are using you will see different supported versions of SolidWorks on this page.

Note that selecting the incorrect version here will block client side connection.



## AUTODESK VAULT PROFESSIONAL SOLIDWORKS INTEGRATION INSTALLATION BASICS

Select to install from the next screen and progress through the prompts to complete



## Installing SWX Client

The SolidWorks client component must be installed on every end user machine you intend to have connected to Vault. The client side integration provides a number of components including:

- **In-CAD data management capabilities** - including a Vault menu and Vault Browser allowing users to check in, check out, open from, insert from Vault as well as view file status and manage lifecycle.
- **Vault Explorer extensions** – including SolidWorks Plot Manager
- **Autodesk Vault Professional Autoloader for SolidWorks** – used to bulk upload SolidWorks files to Vault.
- **Autodesk Autoloader for Vault Professional and Solidworks\*\*** - used to automate DWF creation and property sync tasks for SolidWorks files

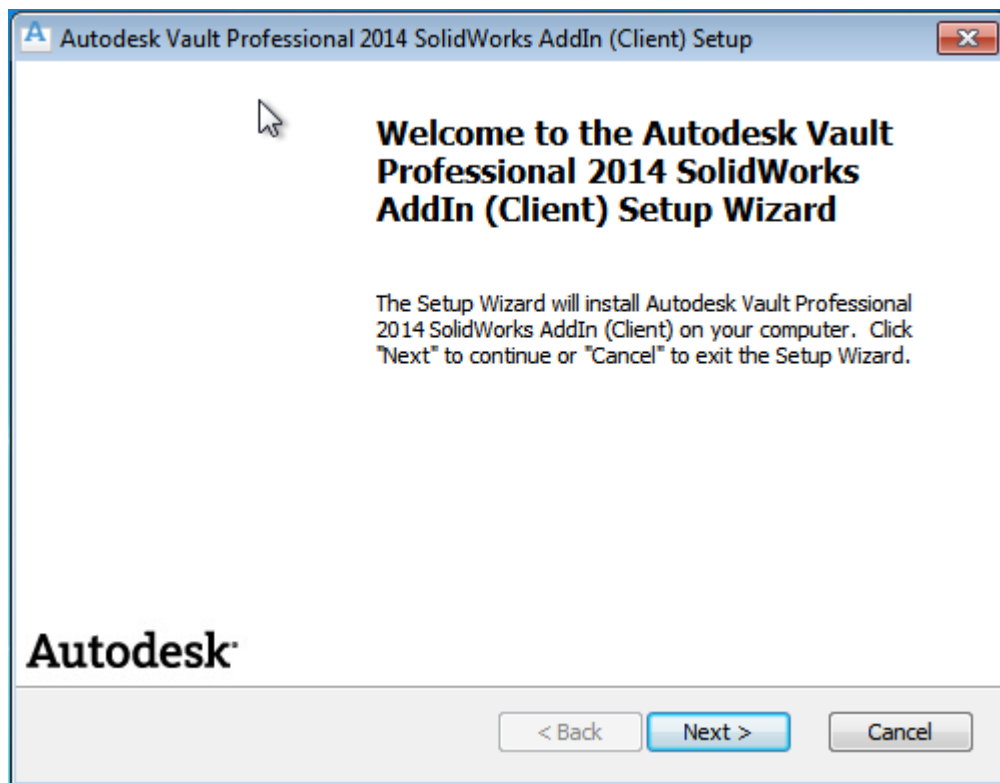
*\*\* Note that this cannot be installed on a CAD user's machine, this needs to be installed on a separate purpose built Job Processor.*

In order to successfully install the SolidWorks client you will need to make sure your current system configuration is supported (see the readme for further details) and you will require:

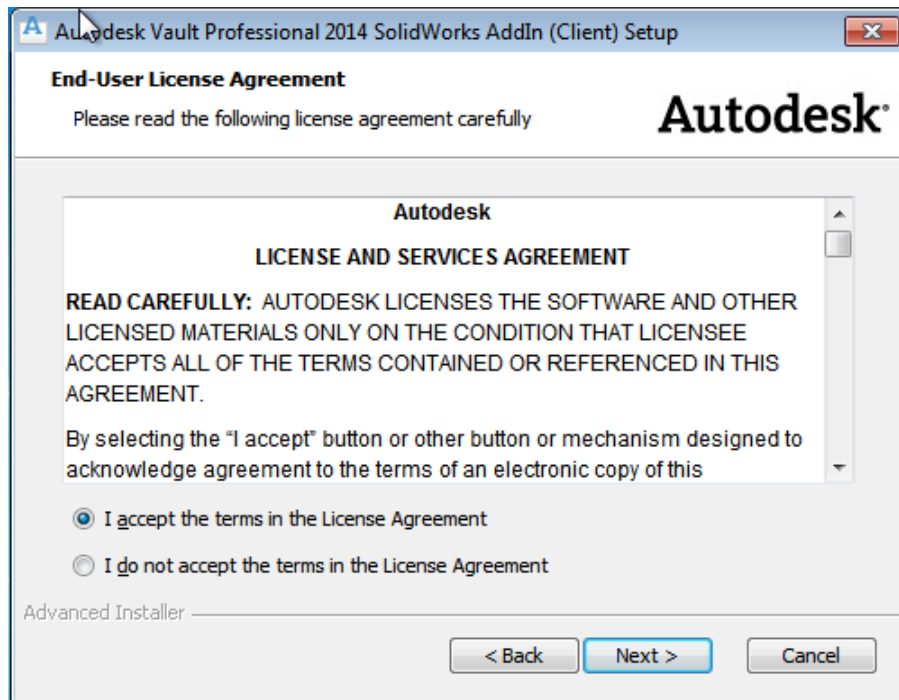
- Supported version of SolidWorks CAD
- Supported version of Vault Professional client (Vault Explorer)

### Install Process

Running the **Client** EXE, select your language setting (EN or DE) and you should see a welcome screen similar to the one pictured below:

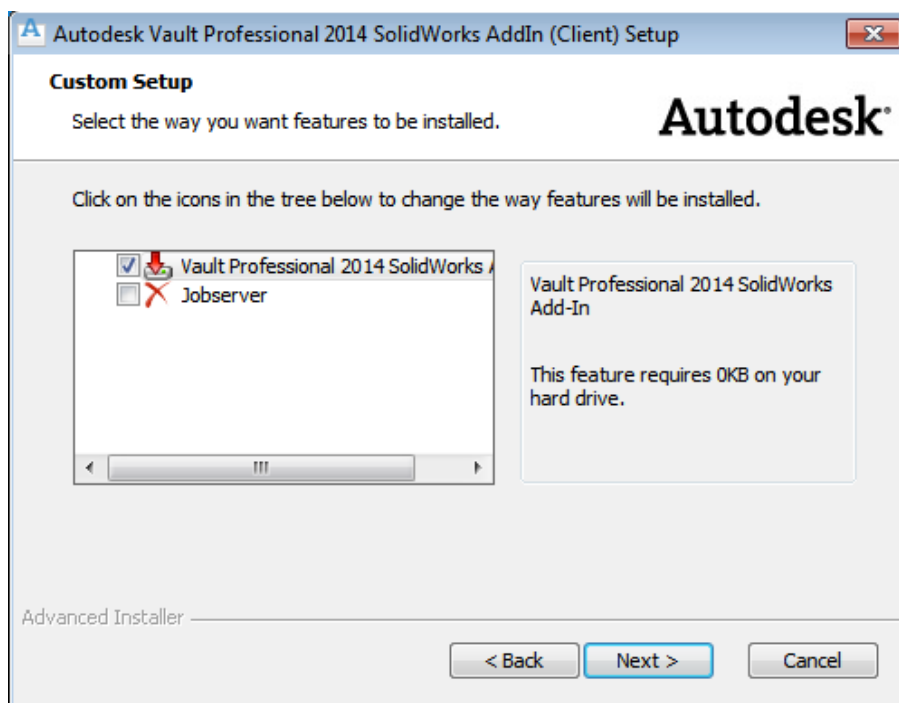


Select Next to bring up the license agreement. You will need to accept this to continue.



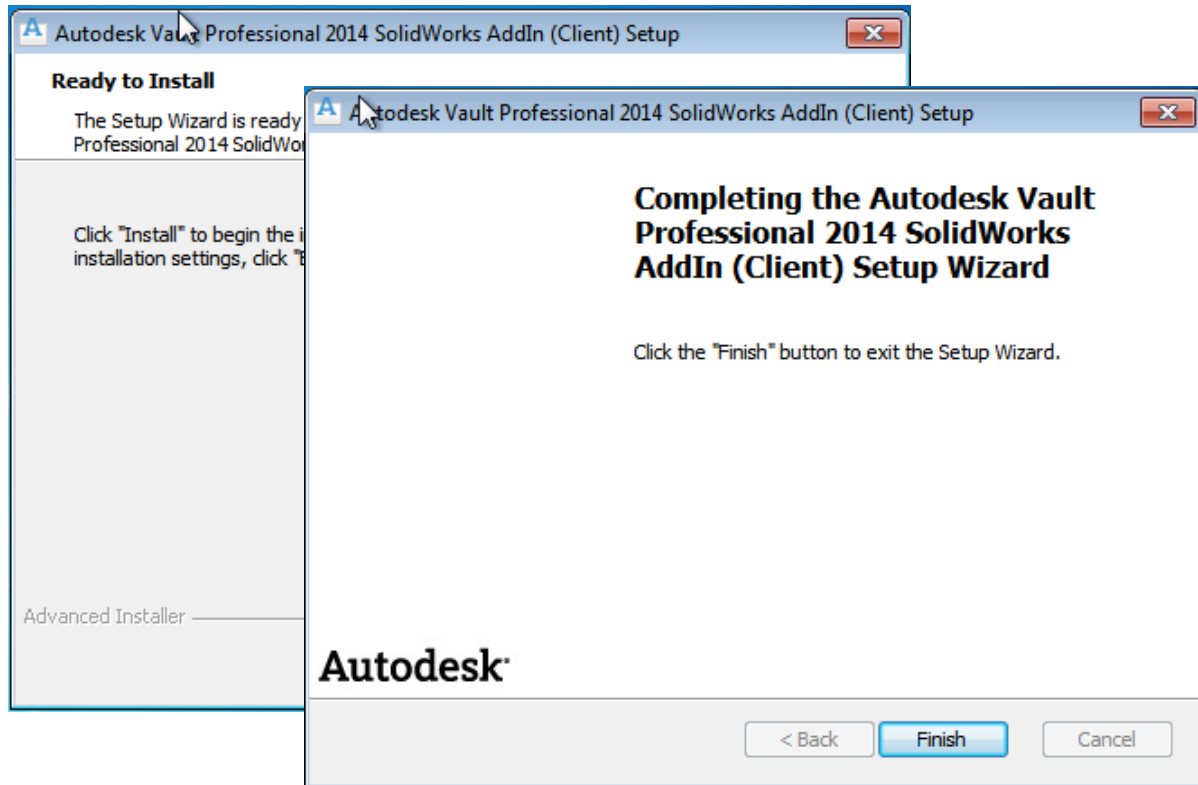
You will now need to select the client side components to install, ensure the default install the Autodesk Vault Professional SolidWorks Add-in is selected to be able to complete the install

The client install also permits the optional install of the SolidWorks Jobserver, **please note that the job processor cannot be installed on a CAD user's machine as the job processor disables the CAD system dialogs.** See the section on installing Job Processor for additional detail on this.



## AUTODESK VAULT PROFESSIONAL SOLIDWORKS INTEGRATION INSTALLATION BASICS

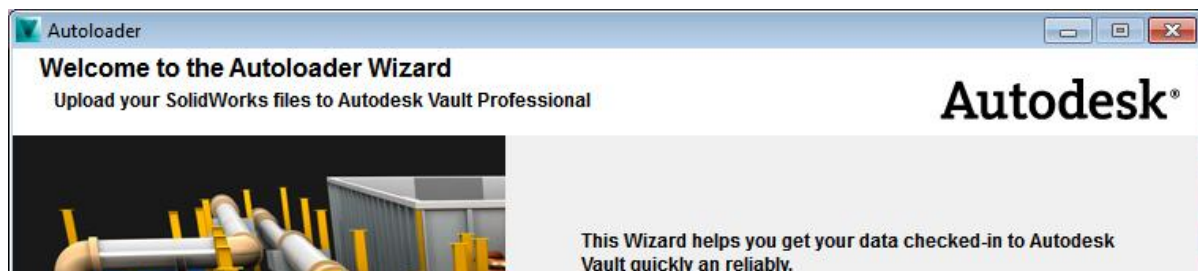
With the SolidWorks Add-in selected, select next and choose install from the following screen. Progress through the prompts to complete installation.



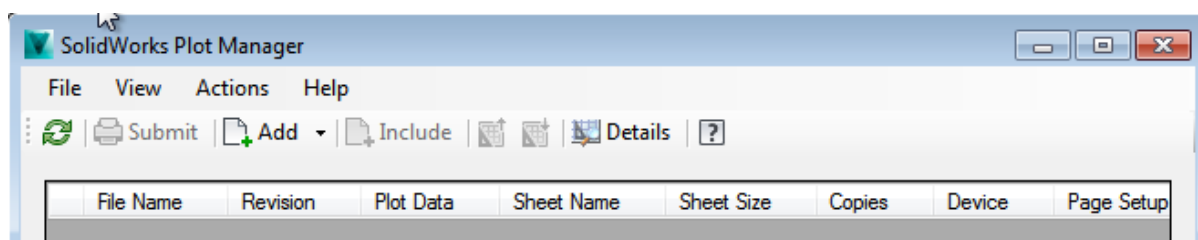
### Components

Once installed correctly the end user machine you should have a new entry in your file menu under:

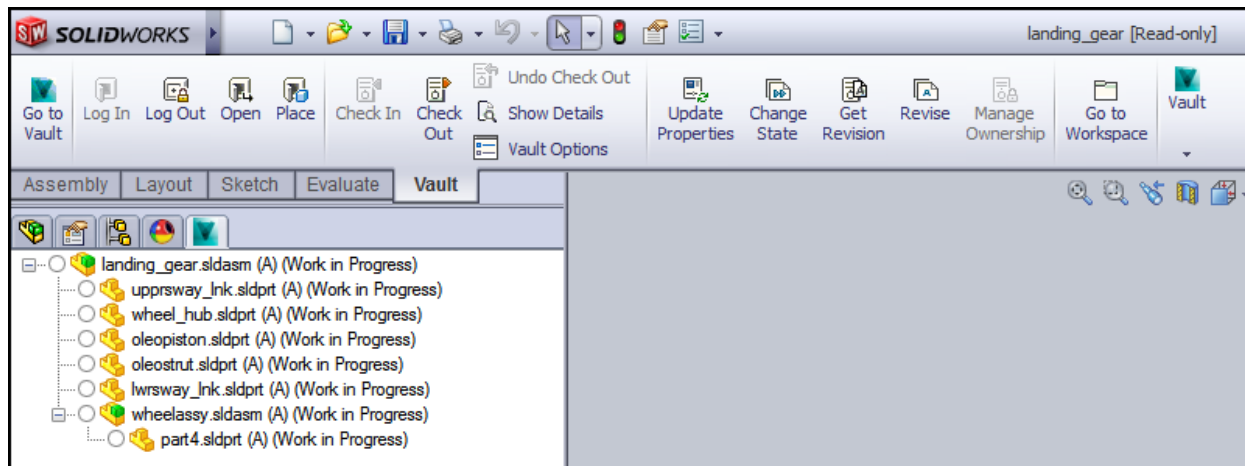
Autodesk>Autodesk Data Management>Tools>**Autodesk Autoloader for Vault Professional and SolidWorks**



The Vault Explorer should have a command button and File menu option to access the **SolidWorks Plot Manager**



Opening Solidworks users should have a new Vault ribbon menu with their Vault commands and a Vault Browser Panel displaying file status



If you are experiencing any issues with the install process or resulting components please see install troubleshooting section.

## Installing Jobserver (Job Processor)

The Jobserver is a client side installation (also known as a Job Processor) required for users to batch update DWF files and sync properties. The Job processor can be configured to create DWF files on check in, during auto loading or to update single DWF views from the Vault Explorer.

For more information on using the Job processor please see **SolidWorks Integration Visualization File Basics**

Because the Job Processor needs to open file content to create the visualization, the job processor machine requires a license of SWX in order to interact with properties and create visualization files (DWF).

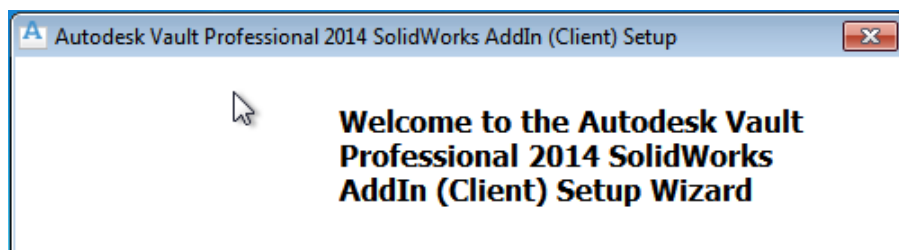
In order to successfully install the SolidWorks Jobserver you will need to make sure your current system configuration is supported (see the readme for further details) and you will require:

- Supported version of SolidWorks CAD
- Supported version of Vault Professional client (Vault Explorer)
- Autodesk Vault Professional SolidWorks Add-in (Client)

**The SolidWorks Job Processor cannot be installed on a CAD user's machine as it suppresses the end users SolidWorks dialogs.**

### Install Process

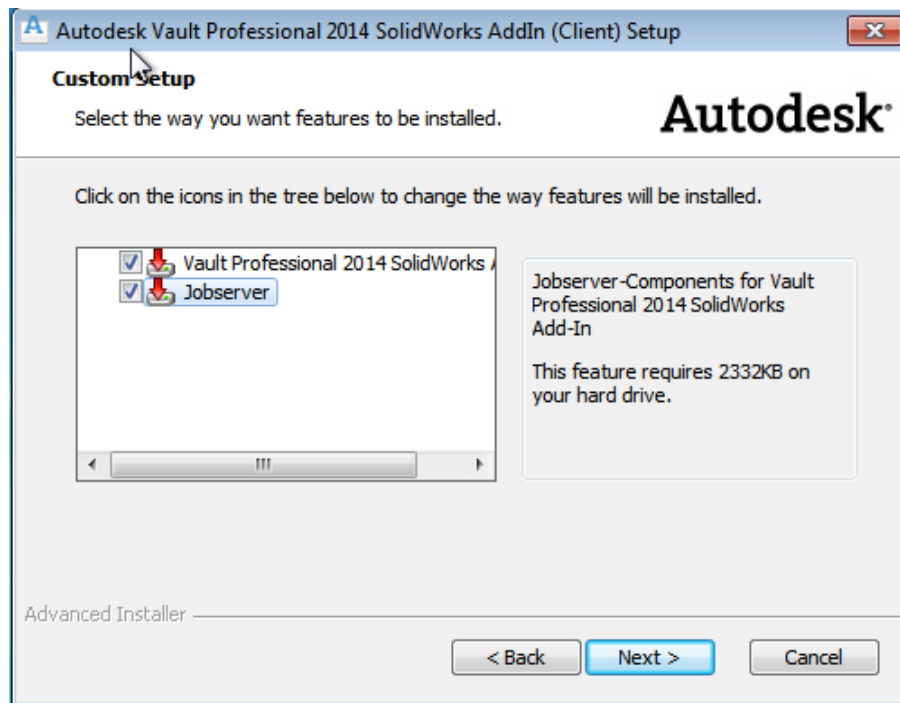
Following the same steps used above in the client install, run the client install EXE



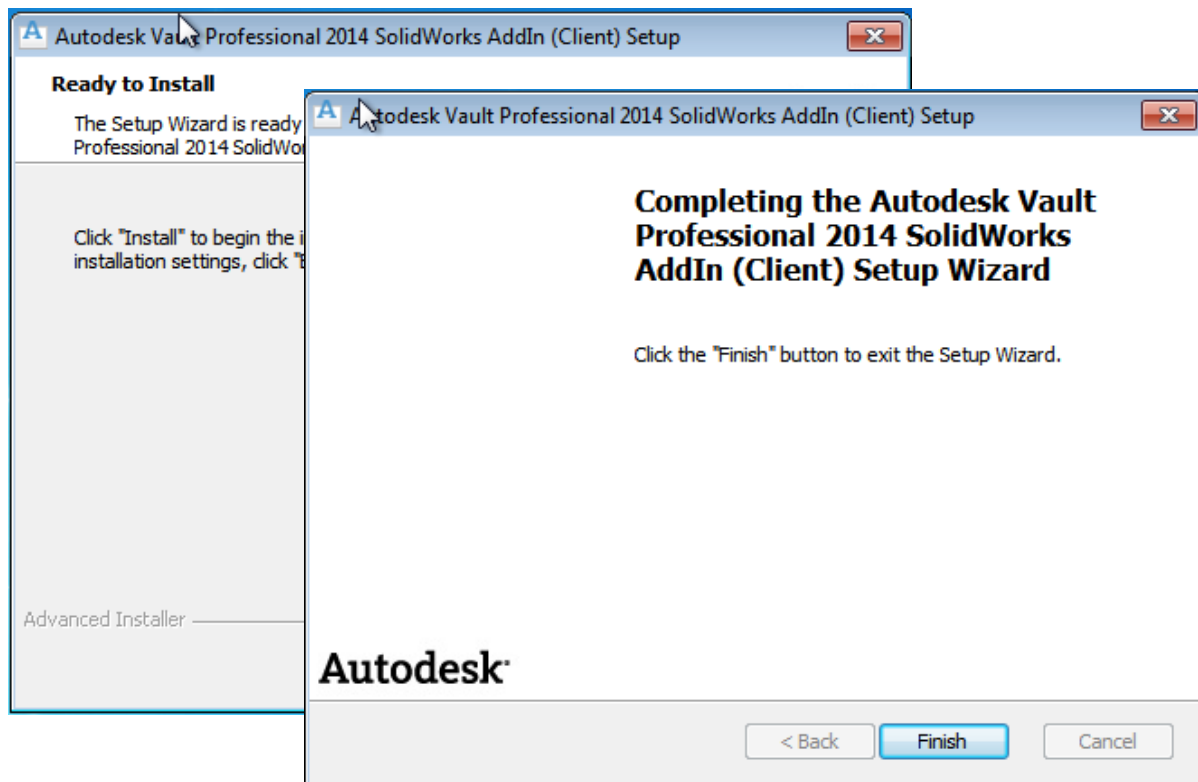
## AUTODESK VAULT PROFESSIONAL SOLIDWORKS INTEGRATION INSTALLATION BASICS

Accept the license agreement and click Next to access the Custom Setup Dialog

Here select BOTH the Vault Professional Solidworks Add-in and Jobserver



Select next and choose install from the following screen. Progress through the prompts to complete installation.





## Installation trouble shooting

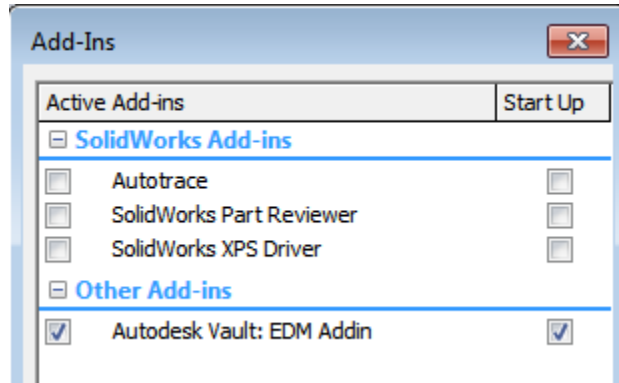
### Logs

In the event of any issues install log information is written to your %temp% folder location

### CAD Add-in Menu Appearance

If after installing the SolidWorks Client you are unable to see any of the Vault Menu items or browser you should first check that the Add-in has loaded correctly.

From the SolidWorks Options menu select “Add-ins” and ensure that the **Autodesk Vault: EDM Add-in** is active and set to load on startup:



### CAD Add-in Dialog Appearance

If after installation the user starts SolidWorks and is able to see the Autodesk Vault Menu and Browser but are not able to log in to Vault or see any other dialogs please ensure that the Jobserver has not been installed locally as this will prevent the user from accessing dialogs. You will need to uninstall Jobserver to resolve this.

### Connection Troubleshooting

There are numerous issues which may prevent the SolidWorks client from connecting with the Vault Server, including firewalls, connection timeout, SQL service interruption, DNS issues, incorrect server details or user credentials to name a few. Please see the Autodesk Vault Support page for further details of steps to troubleshoot connection issues.