

Installation

Release: VISI PDM 2016 R1
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1. General Information

VISI PDM uses Microsoft SQL-Server as its database server. Installation requires 3 main components:

- VISI PDM (program files)
- SQL Server (database server)
- SQL Client (connectivity for SQL-Server)

VISI PDM is in **three editions** with different scale of benefits:

- VISI PDM Team Edition
- VISI PDM Standard Edition
- VISI PDM Viewer Edition

VISI PDM Team Edition is the most powerful edition. Additional to the complete VISI PDM functionality this edition contains all Team oriented functions that has been developed with VISI 20. VISI PDM Team Edition supports simultaneous editing of VISI workfiles by several designers. On 3D Designs as well as on 2D drawings can be worked simultaneously by using an easy to use check out/check in mechanism on layers and plotview pages.

VISI PDM Standard Edition contains the whole functionality of VISI PDM to manage documents and product data except the Visi Team functionality. VISI workfiles which are currently set to VISI Team Mode, only can be opened in a viewer mode and are not editable without Team Edition.

VISI PDM Viewer Edition is a tool like a VISI PDM database browser. It allows users to navigate through VISI PDM projects, search and find documents and view data, if the user is permitted to see. VISI PDM Viewer Edition is a perfect tool for users who do not need to edit data but need to have read only access to product data and files.

Different editions of MS SQL-Server are available. The most important ones of the current Version SQL Server 2008 R2 are:

- **SQL Server 2008 R2 Express (x86 and x64)**
  The 32-Bit version is running under the following MS operating systems:
  Workstation Operation Systems: XP SP3 Home, XP SP3 Professional, Vista SP2 (Ultimate, Home Premium, Home basic, Enterprise, Business 32-Bit and 64-Bit, Windows 7 Ultimate, Home Premium, Home Basic, Enterprise, Professional in 32-Bit and 64-Bit Versions
  Server Operation Systems: Server 2003 SP2 Datacenter, Server 2003 SP2 Enterprise, Server 2003 SP2 Standard, Server 2003 SP2 64-Bit x64 (Datacenter, Enterprise, Standard), Server 2008 SP2 Datacenter, Enterprise, Standard i32-Bit and 64-Bit versions, Server 2008 R2 Datacenter, Enterprise, Standard 64-Bit.

  Limitation(s) on SQL Server 2008 R2 Express:
  Max. 1 GB RAM and 1 SMP; max. Database size 10 GB;
  Administration tool Enterprise Manager as Express-Version downloadable.

- **SQL Server 2008 R2 Standard Edition**
  The Standard Edition has no limitation of the database size, is supporting up to 4 CPUs and 64GB RAM and is including the Enterprise-Manager as administration tool.

There are additional editions available like Enterprise or Datacenter Edition; these are designed for high performance applications.

Together with the VISI PDM Installation-CD the SQL Server 2008 R2 Express (x86 and x64) edition will be delivered. The installation of the SQL Server 2008 R2 Express is part of the installation process.

If there is a MS SQL-Server already installed you can use it for VISI-PDM . Please choose during the installation that SQL Server 2008 R2 Express shall not be installed. VSI PDM supports SQL Server Versions 2000, 2005, 2008 and 2008 R2.

2. License File

The license file (VPDM.lic) contains copy protection information and the number of max. concurrent users of each VISI PDM Edition. It can also include a expiry date for the usage of VISI PDM, used for trial installations.

After installing VISI PDM, a generic license file will be created within the installation directory. This license contains no copy protection, enables 2 concurrent users for VISi PDM Team Edition, one concurrent user for VISI PDM Standard Edition and one concurrent user for VISi PDM Viewer Edition. The usage of this license is limited to 30 days (a 'Demo' license) after installation.

When starting VISI PDM a window is displayed thats gives you information on the remaining days until the expiry date and your installation code. With this installation code you can request an unlimited license file from your dealer.

3. Information for VISI PDM Installation

3.1. Information for installing on a single seat

To run VISI PDM on a single seat the following components need to be installed:

- VISI PDM (program files)
- SQL-Server (database server)
- SQL-Client (connectivity for SQL-Server)

Follow the instructions in section 4.0.

3.2. Information for installing on a network

The database server (MS SQL-Server) needs to be installed on one computer within your network. The users of VISI-PDM (clients) will connect to this server via the network, allowing them to access the databases the SQL-Server is managing.

To run VISI PDM on a network the following components need to be installed:

On the server:

- VISI PDM (program files)
- SQL-Server (database server)

- SQL-Client (connectivity for SQL-Server)

On the client(s):

- SQL-Client (connectivity for SQL-Server)

The VISI PDM directory on the server has to be shared, as the clients need read and write access to this directory (see online documentation for further information).

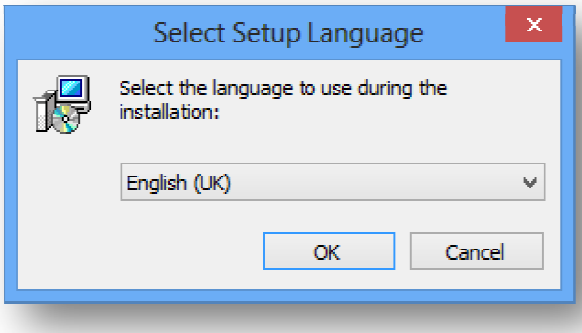
By using this type of installation, the program files and the files with the user dependent settings will be loaded from the server. It is easy to maintain because you need to install updates on the server only.

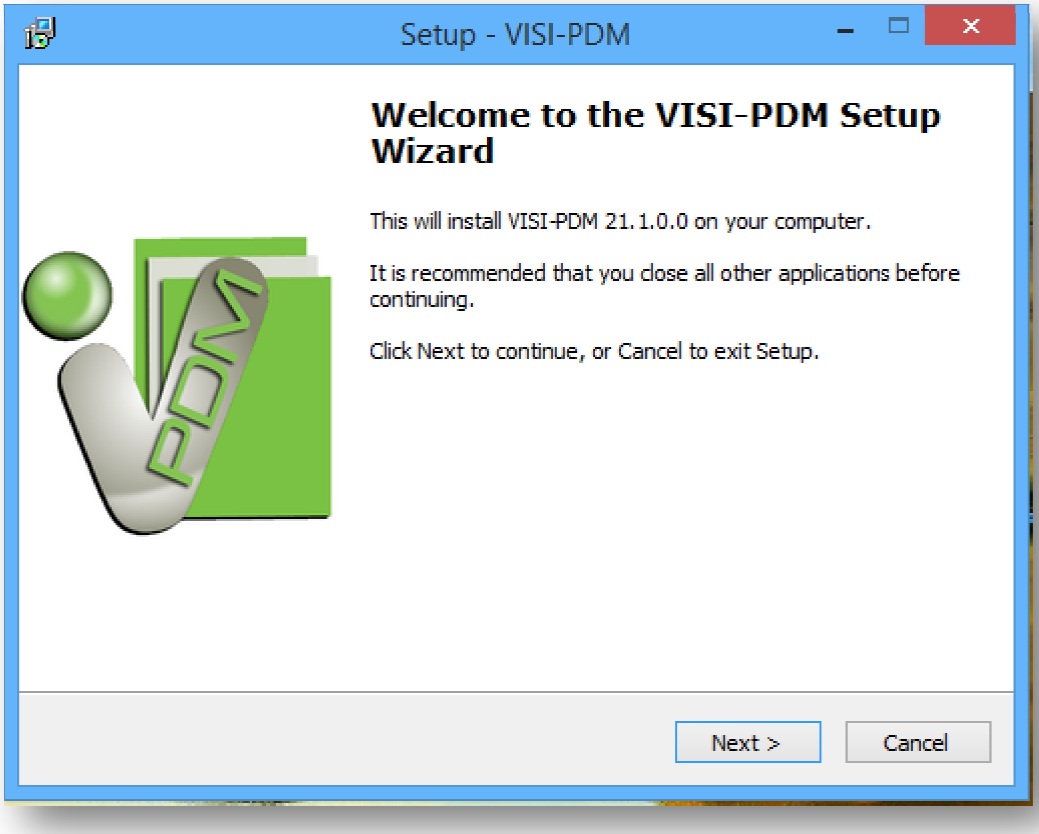
If you have a very slow network environment, you can store the program files and the files with the user dependent settings locally on each client. This will minimize the network access (traffic) to the server.

During the setup routine for the client, you can choose between either methods.

4. Installation of VISI PDM on a Server or Single Seat

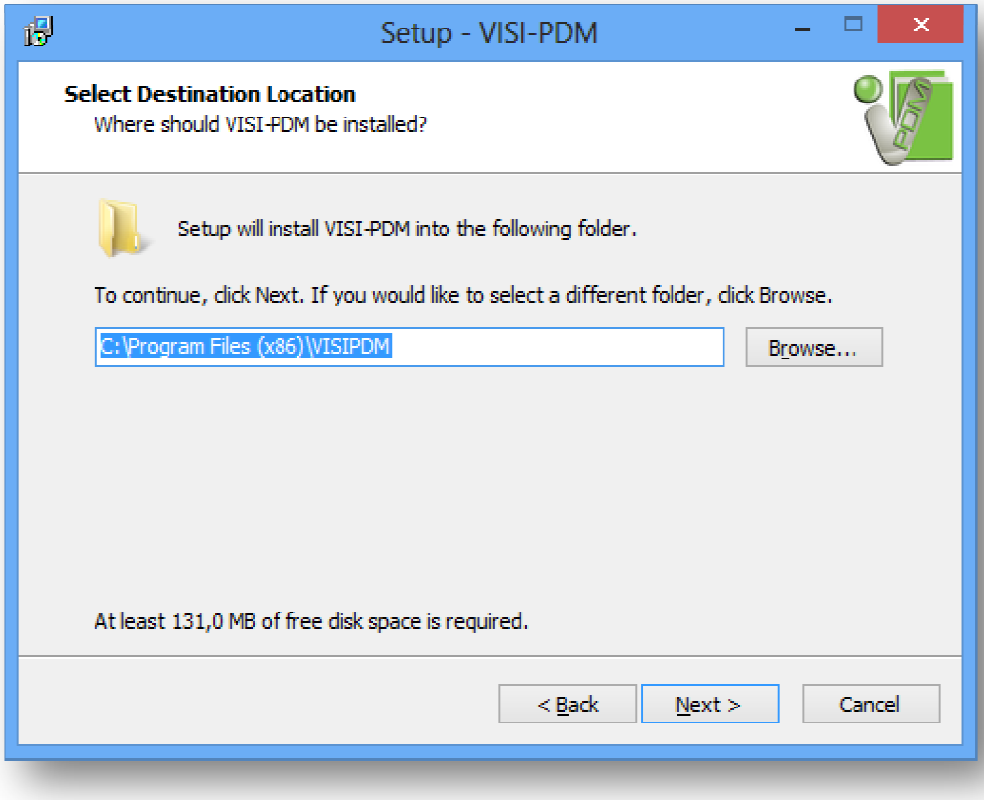
1. Login to the system as an 'Administrator'.
2. Close all open applications.
3. Temporarily disable any anti-virus software.
4. Open the file 'Setup.exe' from the CD.
5. Select your installation language, then press 'OK' to continue.





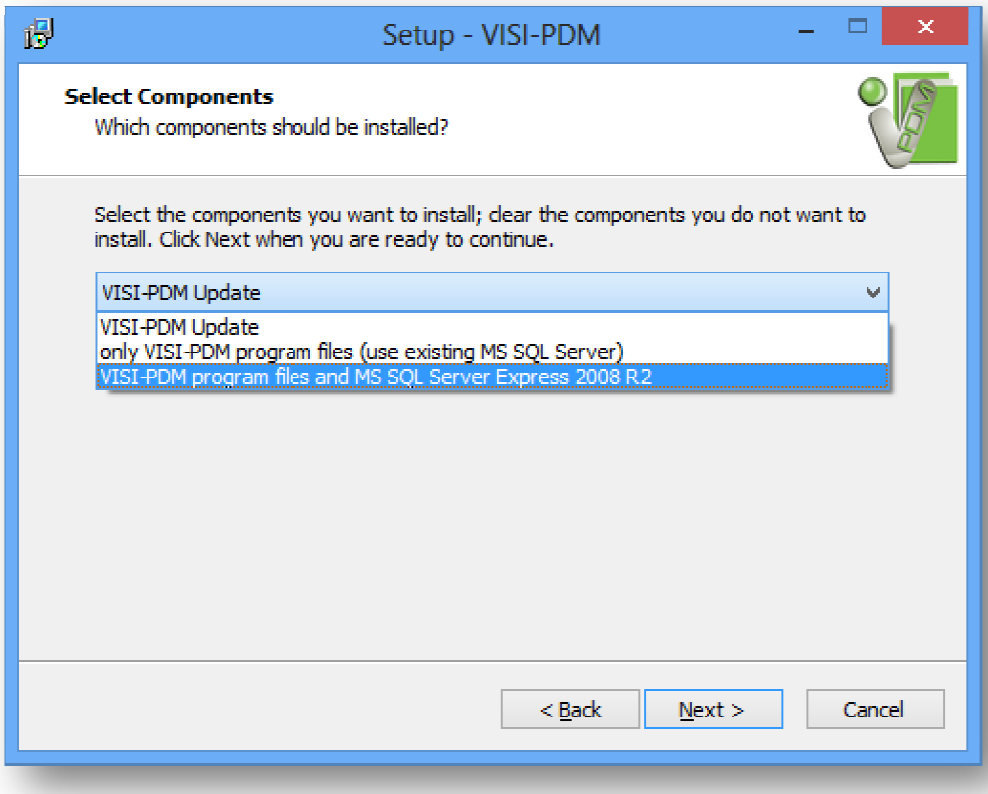
The installation process will now start:
Press 'Next' to continue.

6. Select the destination folder for the VISI PDM installation:



Press 'Next' to continue.

7. Select the components to be installed:



VISI-PDM Update

- VISI-PDM Program files

will be installed. Choose this option if you want to update your current installation of VISI PDM.

only VISI-PDM Program files (use existing MS SQL Server):

- MS SQL Client
- VISI-PDM Program files

will be installed. Choose this option if you want to install VISI PDM using an already installed MS SQL Server. Please have the password for the database system administrator (sa) available if using the SQL authentication. If you want to use a different edition of MS SQL Server than the delivered MS SQL Server Express 2008 R2 (x86) edition, please install the MS SQL Server first.

VISI-PDM Programmdateien and MS SQL Server Express 2008 R2:

- MS SQL Server Express 2008 R2 (x86)
- MS SQL Client
- VISI-PDM program files

Will be installed.

Press 'Next' to continue.

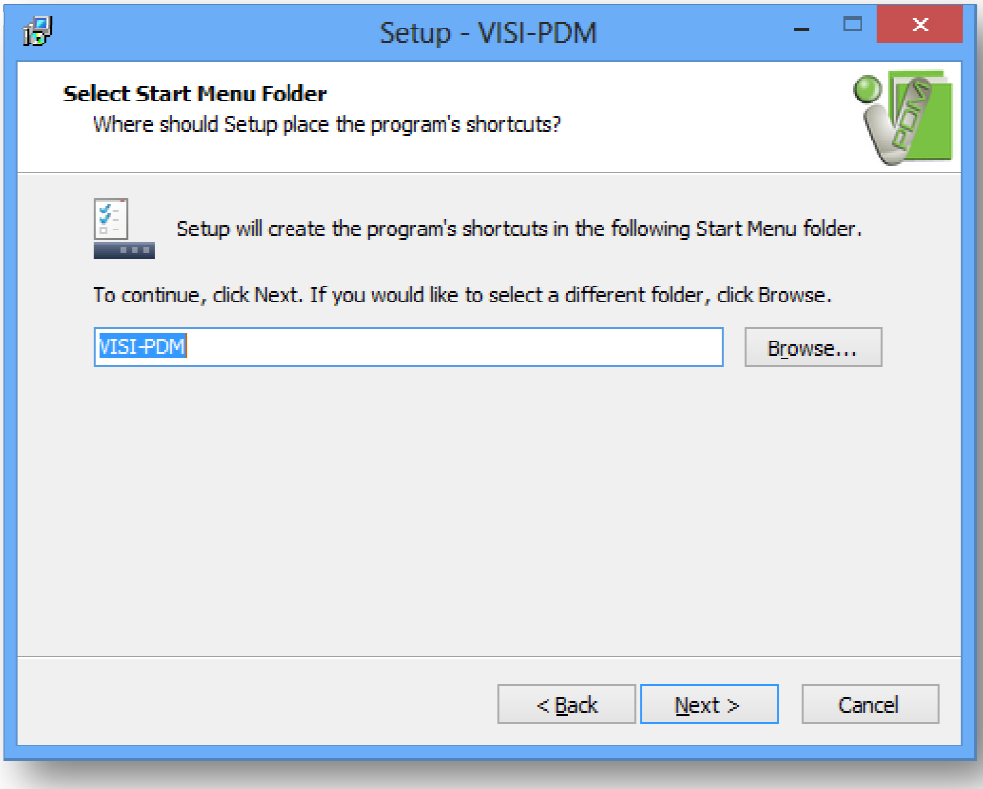
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8. MS SQL-Server Authentication

   During the installation of the MS SQL Server Express 2008 R2 the instance VISIPDM of the SQL Servers will be installed. Automatically both, the SQL Server authentication and the windows authentication will be configured to access the SQL Server. The password for the database administrator ***sa*** is „**VisiPDM2008R2**“ (please consider upper and lower case letters)

Important: The password is necessary to create new databases and new users.

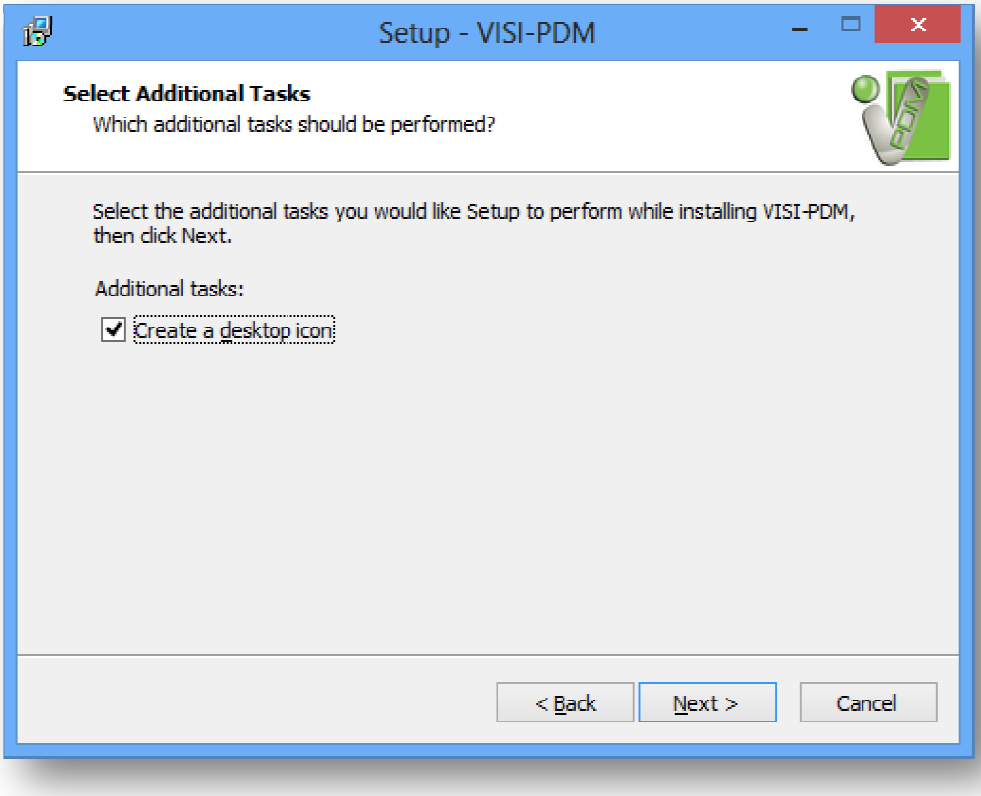
9. Select the Windows 'Start Menu' folder:



Select the 'Start Menu' folder where the program shortcuts should be created.

Press 'Next' to continue.

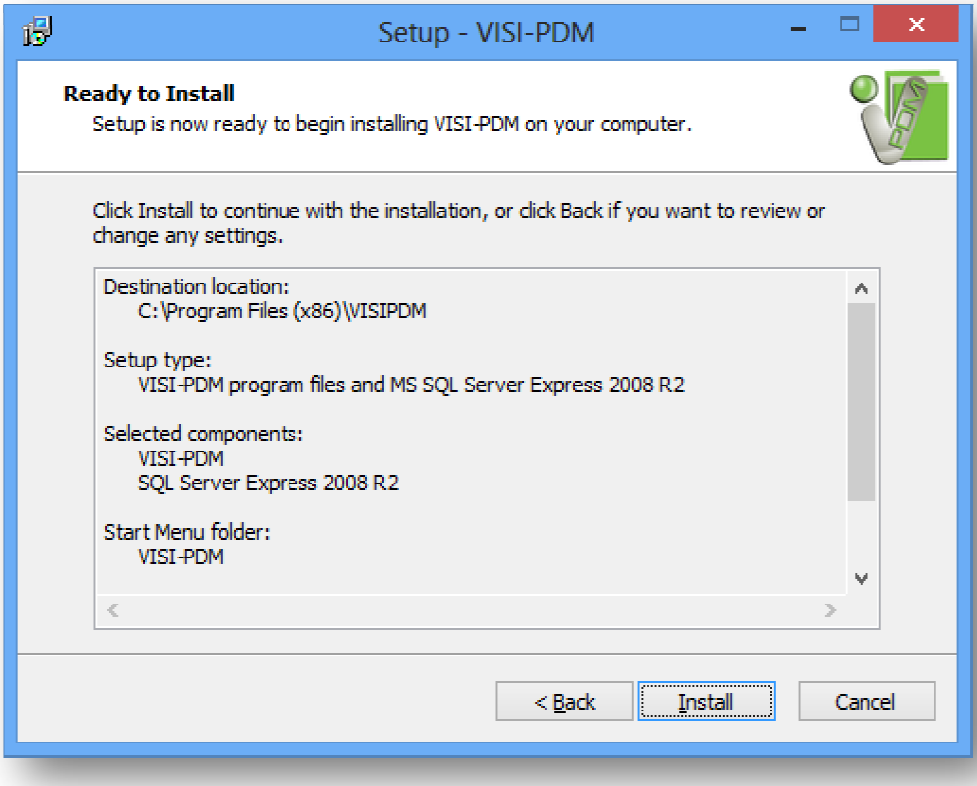
10. Create a desktop icon:



Press 'Next' to continue.

11. Verification of the Settings:

The installation routine will show all settings made on previous screens. Please verify the settings. If all settings made correctly please press „Install“ to start the installation process.

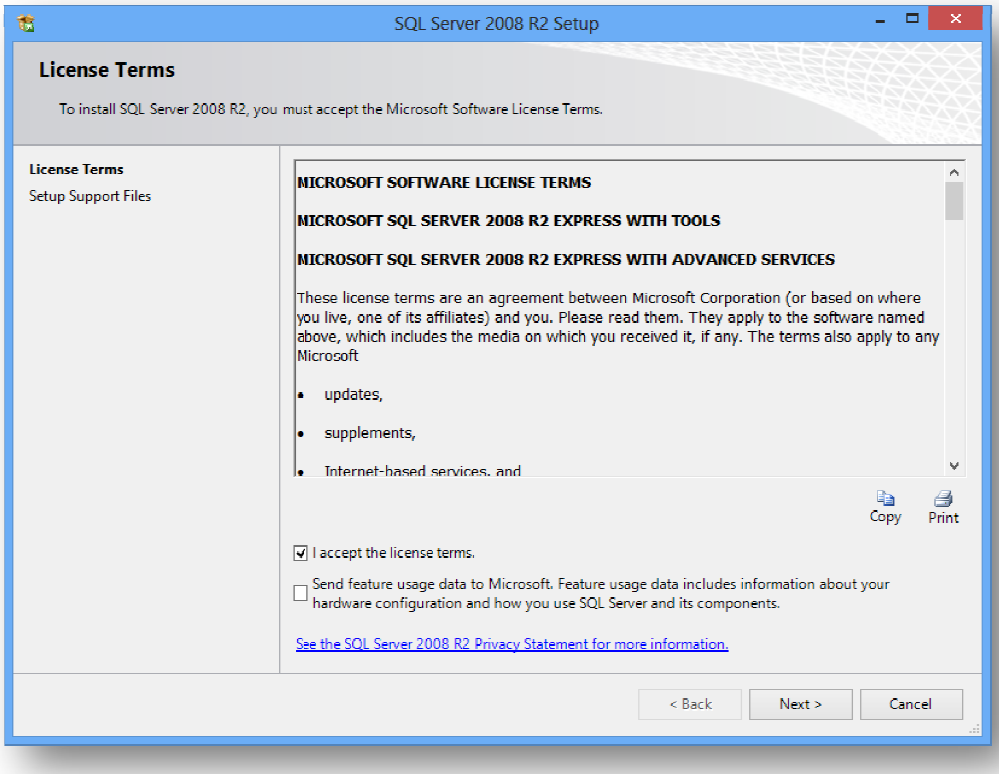


If you already have installed an earlier version of VISI PDM in your installation path (Update installation), file VPDM.LIC will not be overwritten. File VPDM.LIC contains your license data. If you have a license file VPDM.LIC of an older version (up to V19) in your application path, it can not be used anymore with V20 and higher. In this case, you need to replace VPDM.LIC (or maybe first save or rename your VPDM.LIC file). This Setup only contains a VPDM.LIC demo license that has an expiry period of 30 days.

Please contact your local dealer to get a full version 2016 R1 license file.

If you selected an SQL Server installation, after extracting the setup files to a temporary folder, the installation dialogs of SQL Server installation will follow. If you did not select a SQL Server installation, please skip to step 20.

12. Accept Microsoft License Terms to install SQL Servers 2008 R2

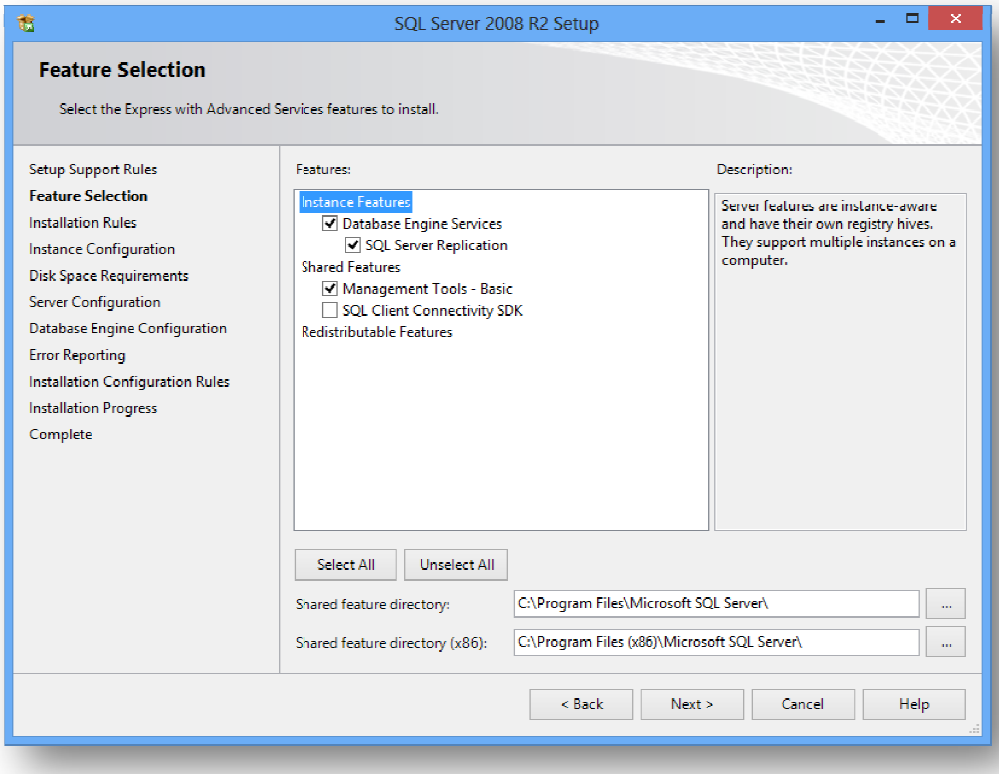


Set Checkbox „**I accept the license terms**“ and press „***Next***“

N the next step the installation requirements are checked. If something is missing on your system, you will be informed, usually with a link where you can download the missing components.

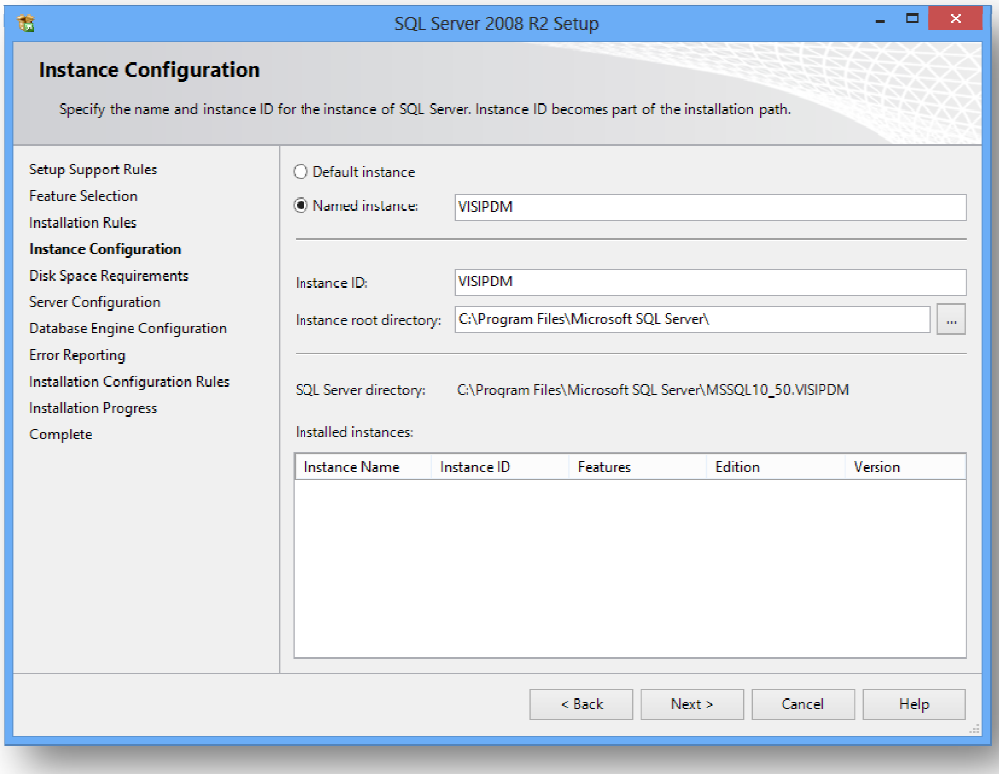
First install missing components and repeat your VISI-PDM Installation.

13. SQL Server Feature Selection



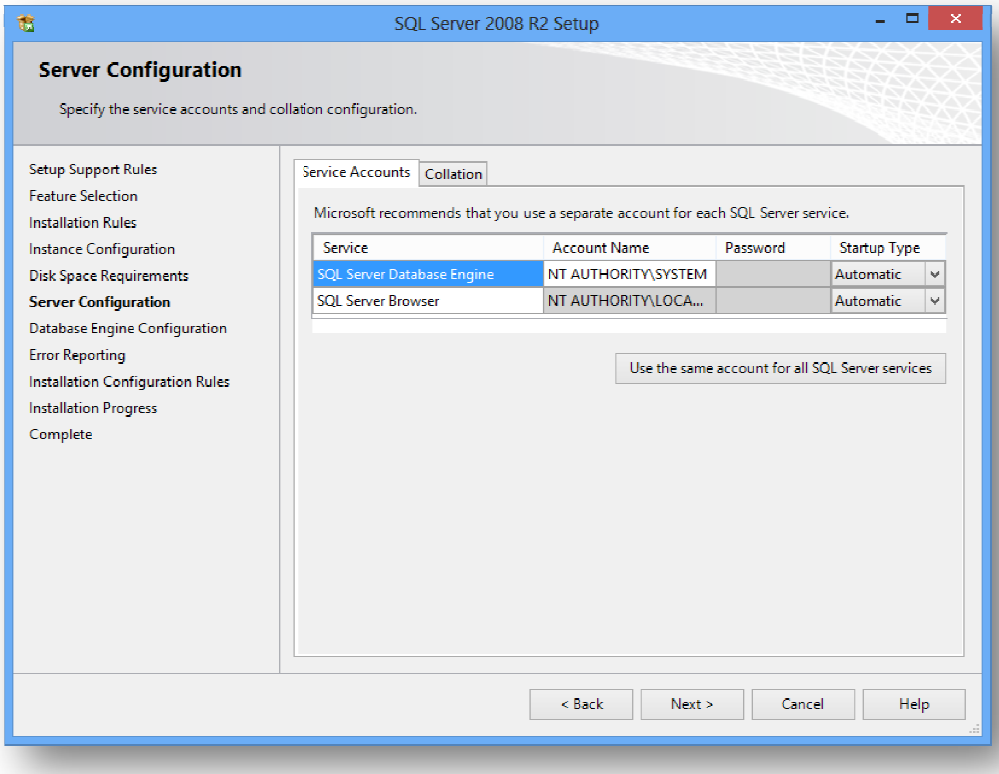
SQL Server Engine, Replication and Management Tool are already preselected. Confirm by pressing „***Next***“.

14. Instance Configuration



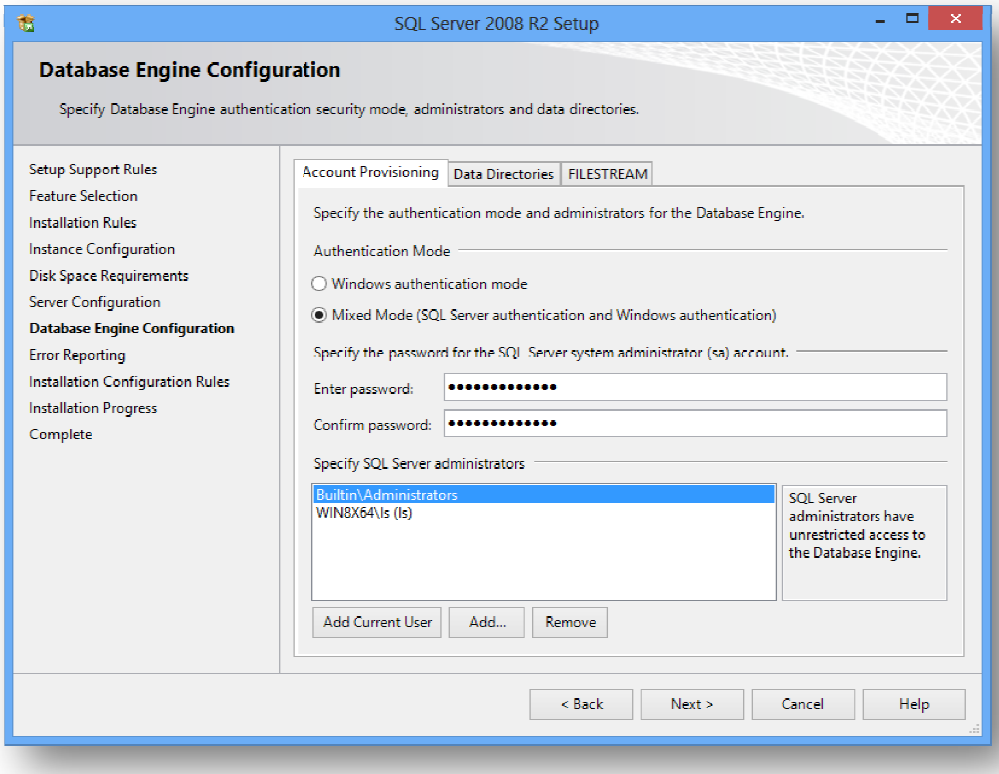
Instance name and ID ***VISIPDM*** is already presetted.

15. SQL Server Configuration



Press „***Next***“ to continue.

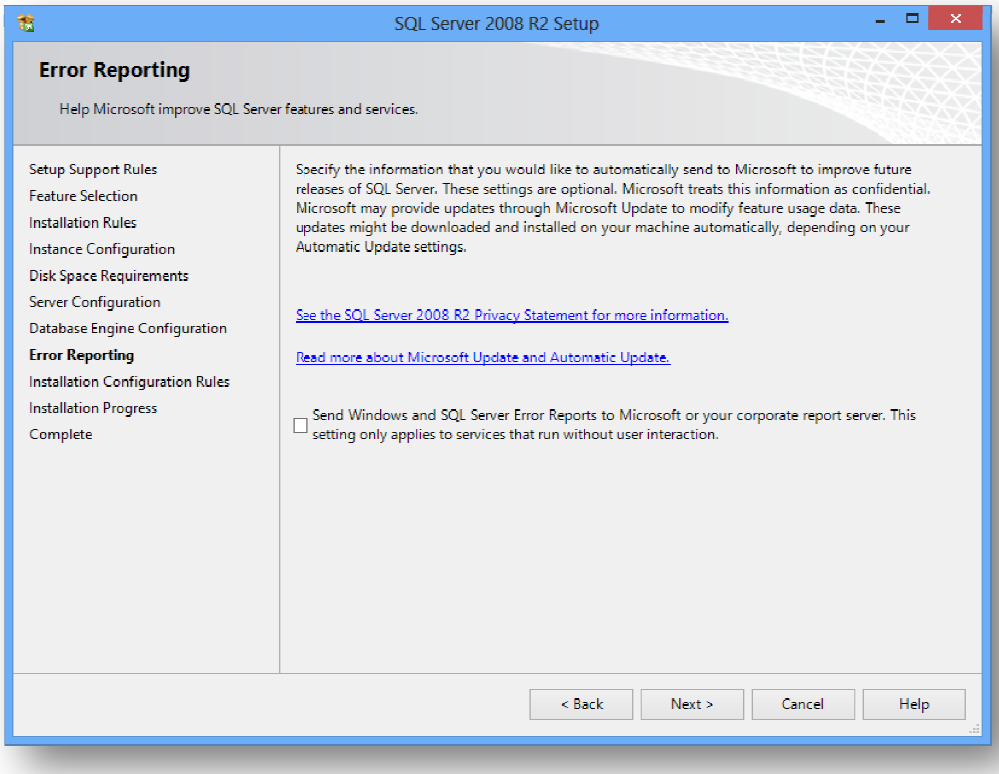
16. Database Engine Configuration



SQL Server Authentification (mixed mode) is preselected. Otherwise all users need to have server administration permissions to access to SQL Server.

Press „***Next***“ to continue.

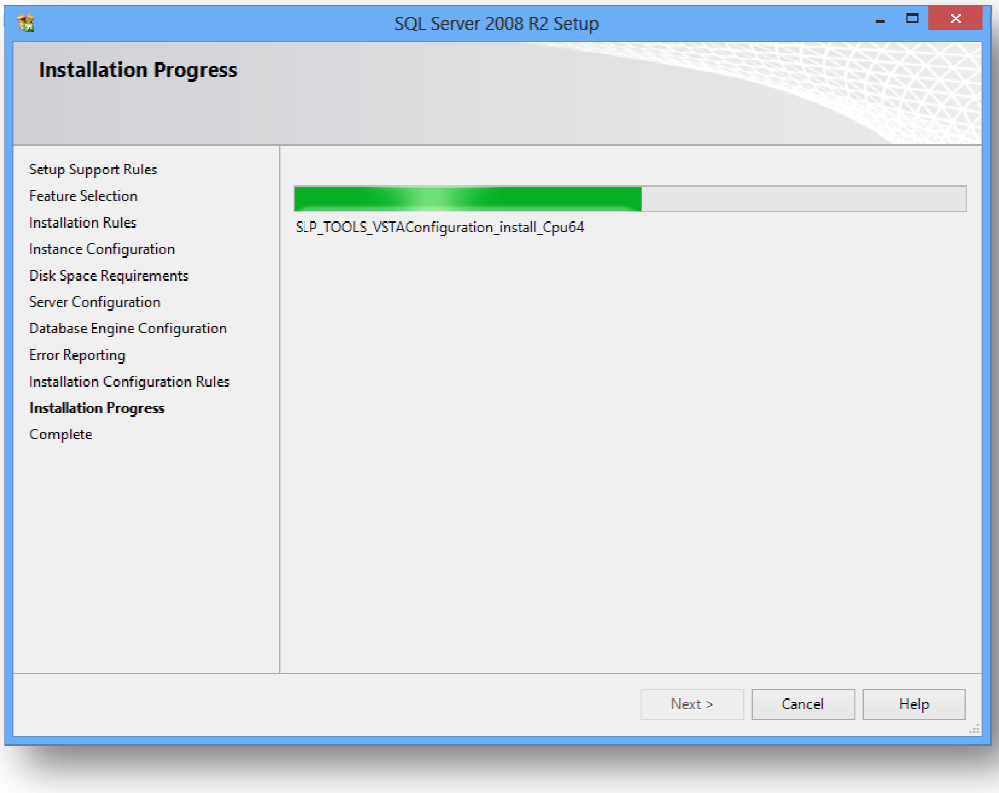
17. SQL Server Error reporting



Default is not to send any reports to microsoft. You can change this selection if you like.

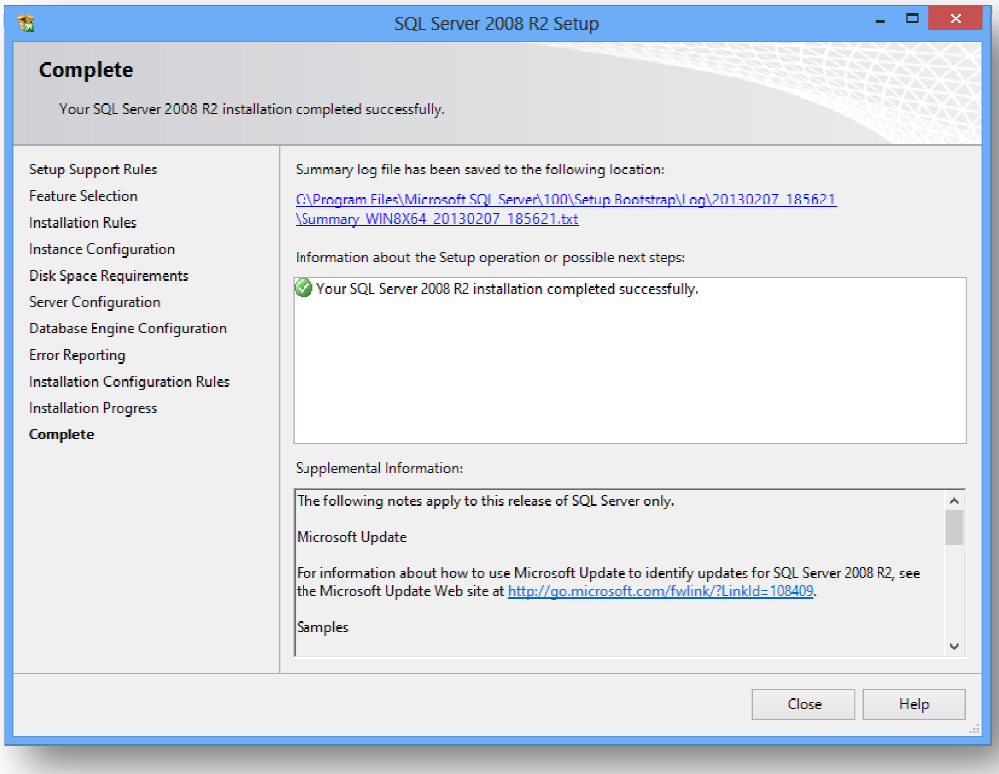
Press „***Next***“ to continue.

18. Wait for Installation Progress



After installation is done, press „***Next***“ to continue.

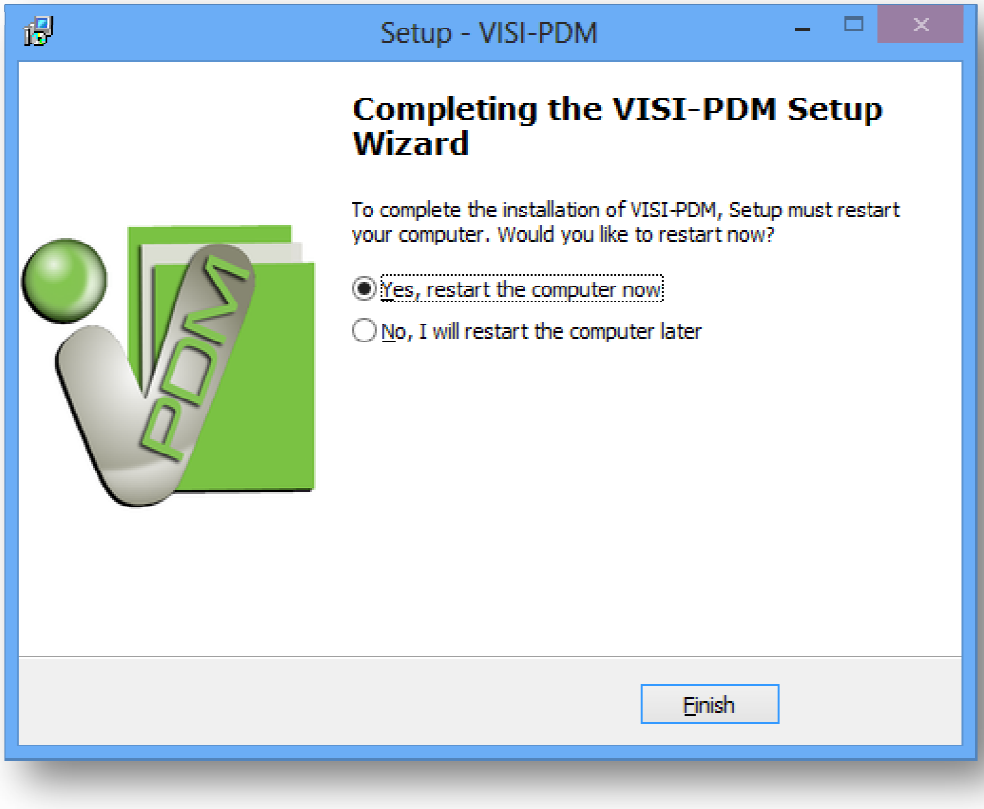
19. Complete SQL Server Installation



Press „***Close***“ to complete SQL Server Installation.

SQL Server installation dialog will be closed and returned to complete VISI-PDM Installation.

12. Complete VISI PDM Installation:



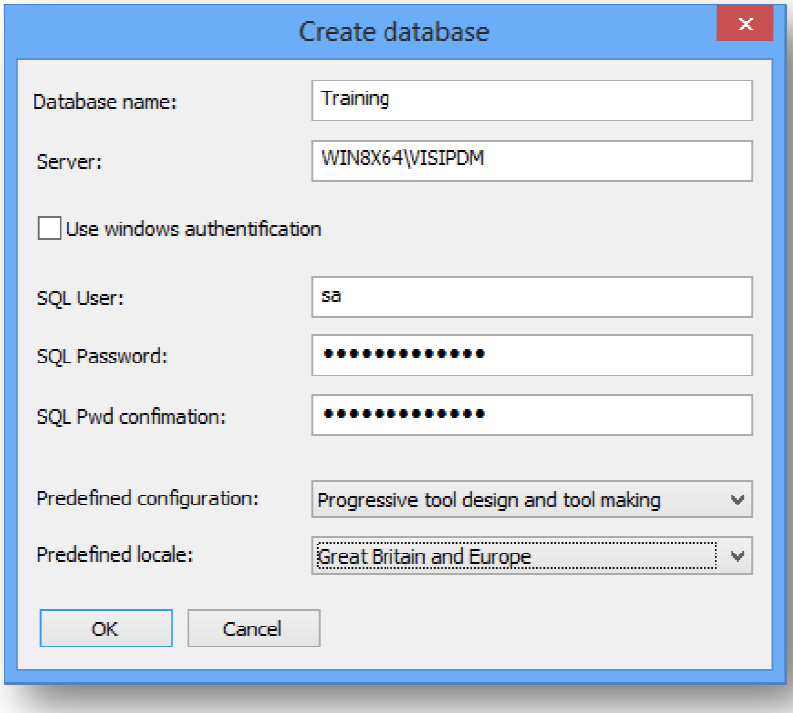
Press 'Finish' to complete the installation routine.

13. Restart the computer and login again.

5. First Start of VISI-PDM

When you start VISI-PDM the first time no database is present.

F irst you have to create a database. After launching VISI PDM the first time the following dialog will be shown:



Database name:
Enter the name for the new database.

Server:
Enter "Computername\VISIPDM",Computername is the name of the computer where the SQL-Server is installed, VISIPDM is the instance name of the SQL installation.
If you are using a different instance of the SQL Server, please enter in the following form: „*Computername\Instancename*“

SQL- Server authentication:
The SQL- Server authentication will be performed by the System. SQL Server login can be done using one of two methods:

- Windows - authentication
- SQL - authentication

Choose SQL authentication. Perform the following steps:

- Deactivate the Windows authentication.
- Enter 'sa' for the SQL User (This SQL-User is already present).
- Enter the SQL Password (Using the standard installation incl. SQL Server the password is defined as „VisiPDM2008R2”; this password is case sensitive).

If MS SQL-Server was already installed, please ask your system administrator for these details.

Predefined configuration:
When creating a database, VISI PDM will automatically provide most of the settings and definitions for you. If needed, you can always modify the configuration (a feature that saves a lot of time).

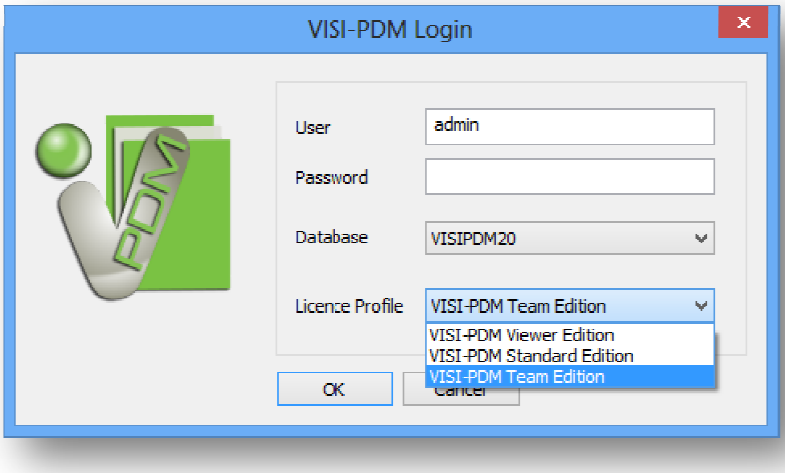
Predefined locale:
When generating the database, VISI PDM will populate the locale fields within your database in relation to the option you select from this menu.

By confirming with 'OK', VISI PDM will generate the database. This may take a little time (maybe a few minutes) before completion.

Once the database has been created, the VISI PDM login page will appear.

6. First Login to VISI-PDM

VISI PDM automatically creates a new user for each database. The login name of this user is 'admin', with no password.



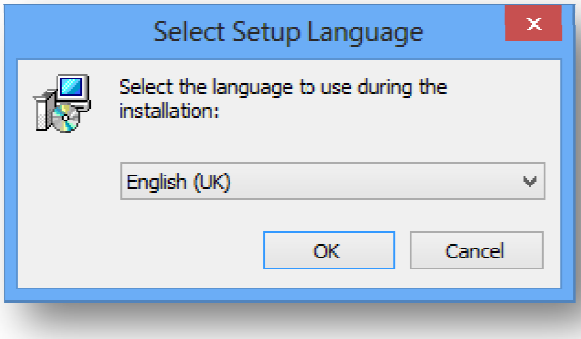
Log into VISI PDM using the 'admin' account.
Select license profile „VISI-PDM Standard Edition“ or „VISI-PDM Team Edition“. If you select „VISI-PDM Viewer Edition“, you cannot proceed in doing settings and customizing of VISI PDM, because VISI PDM then is only in Viewer mode.

You can access the online documentation by pressing [F1], then navigating to the 'Getting Started' chapter.

7. Installation of VISI-PDM on a Network Client

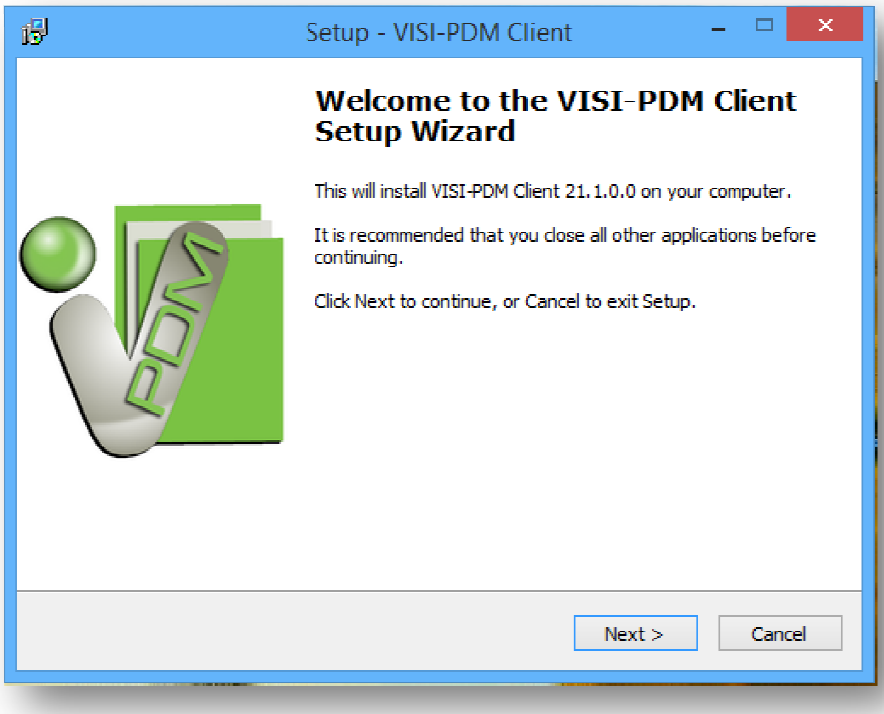
Ensure that the 'VISIPDM' directory is shared on your server, and that you have full control/permissions from client workstations.

1. Login to the client system as an 'Administrator'.
2. Close all open applications.
3. Temporarily disable any anti-virus software.
4. Open the file 'Client-Setup.exe' from the VISI PDM directory on the server.



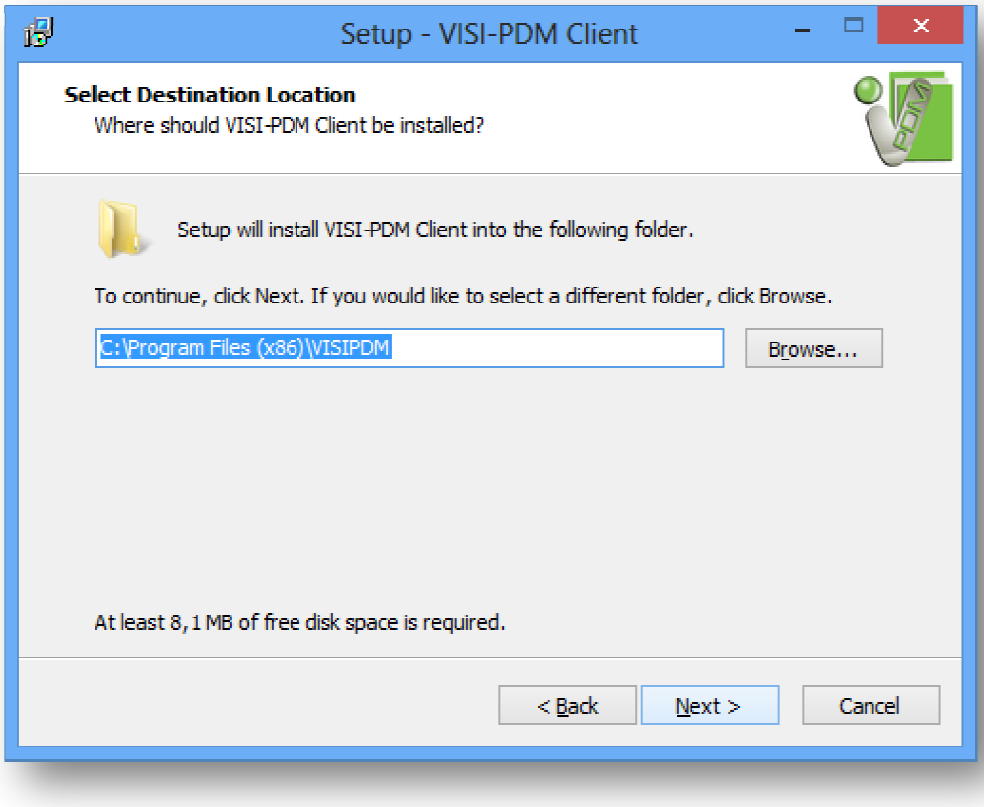
5. Select your installation language, then press 'OK' to continue.

The installation process will now start:



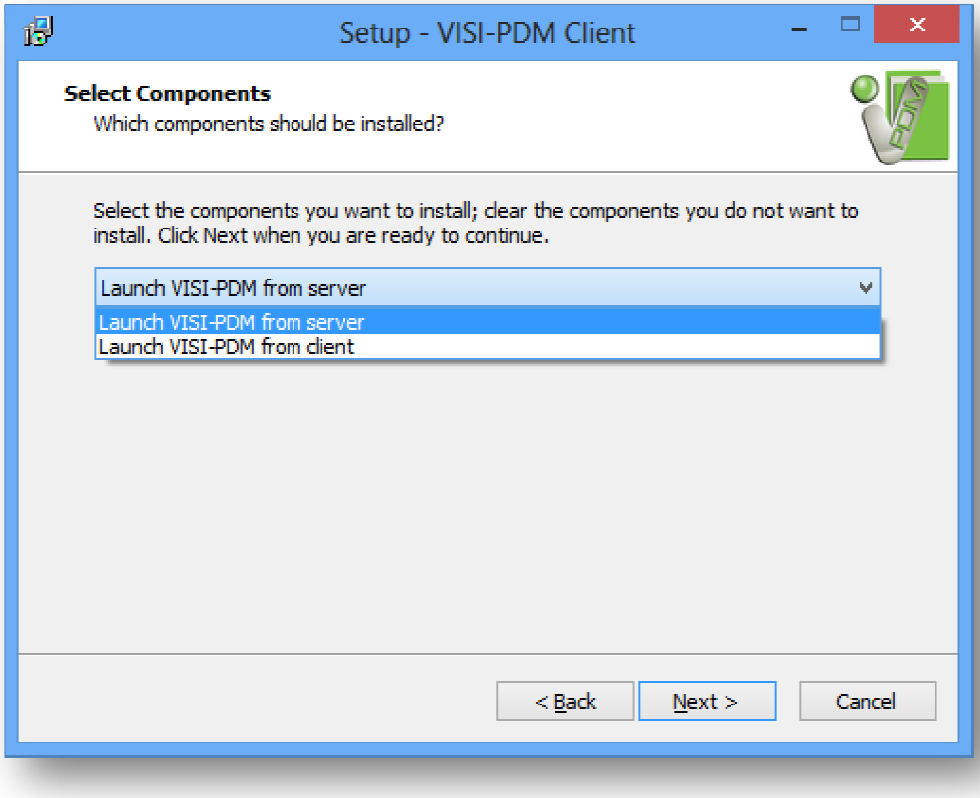
Press 'Next' to continue.

6. Select the destination folder for the VISI-PDM installation:



Press 'Next' to continue.

7. Select the components to be installed:

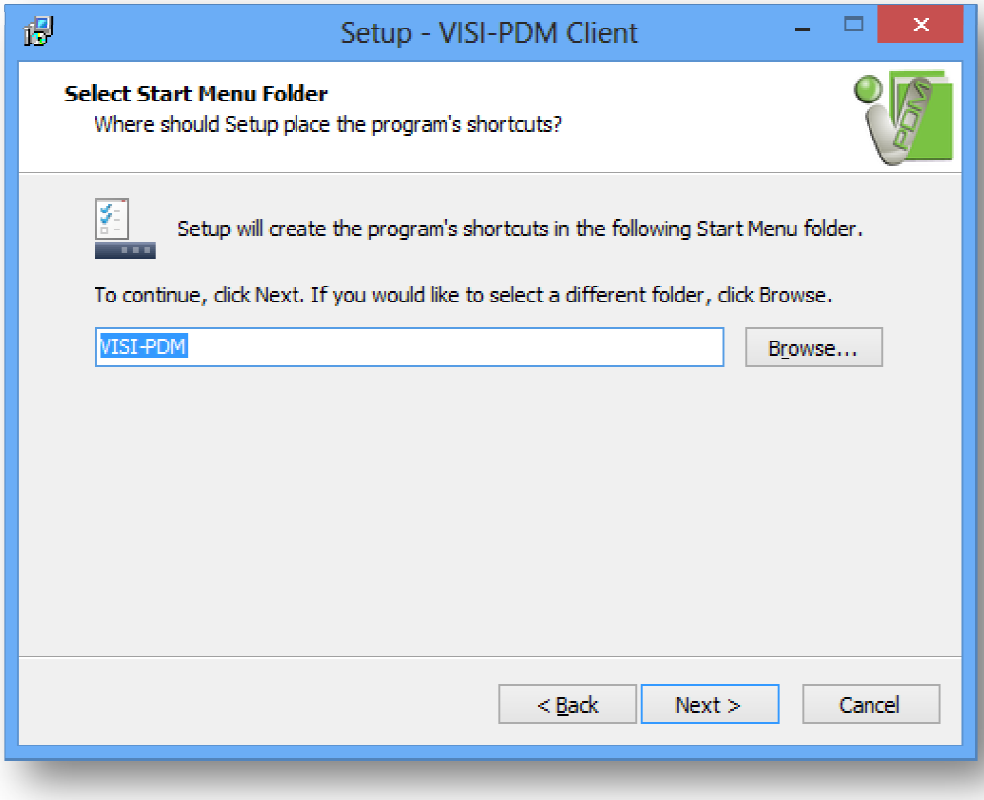


Launch VISI-PDM from server:
No VISI-PDM files will be installed, only some utilities will be copied and registered. VISI-PDM will be started directly from the server.

Launch VISI-PDM from client:
The VISI-PDM files will be installed on your computer. VISI-PDM will be started from the client. (useful for slow networks).

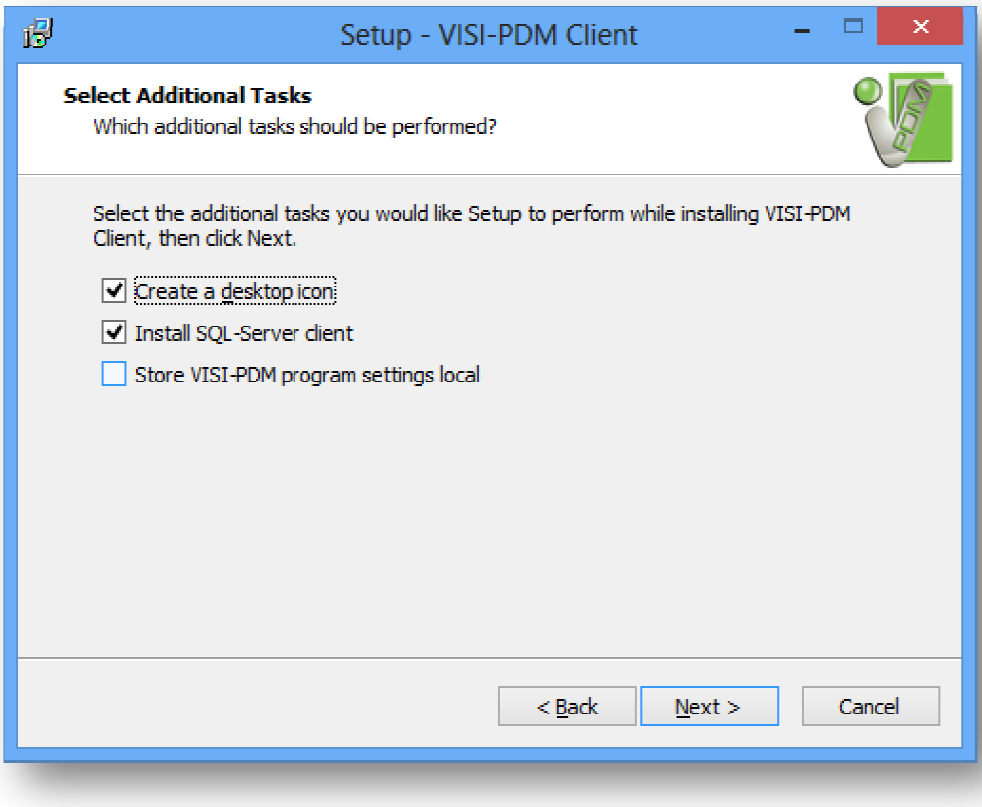
Press 'Next' to continue.

8. Select the Windows 'Start Menu' folder:



Press 'Next' to continue.

9. Select additional tasks:



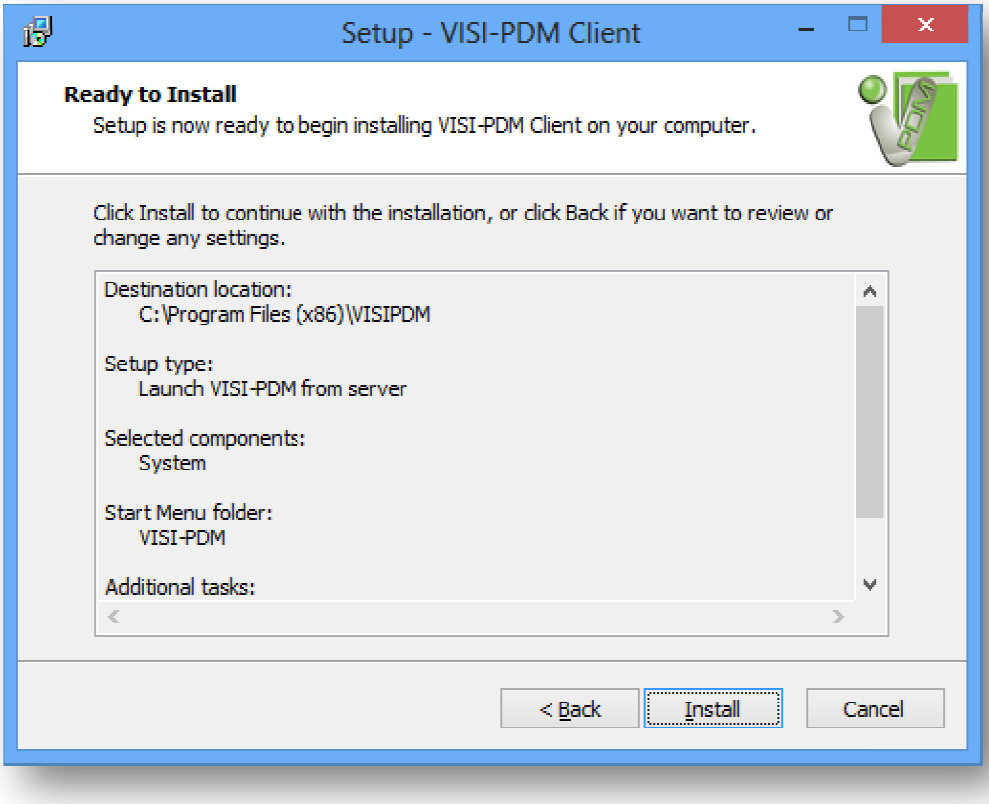
Create a desktop icon:
Creates a desktop icon for VISI-PDM.

Install SQL Client:
Will install the SQL-Client on this computer. The SQL-Client is needed to connect to the SQL-Server, where the database is installed.

Store VISI-PDM program settings local:
Will install the 'username'.ini on your local machine. (useful for slow networks).

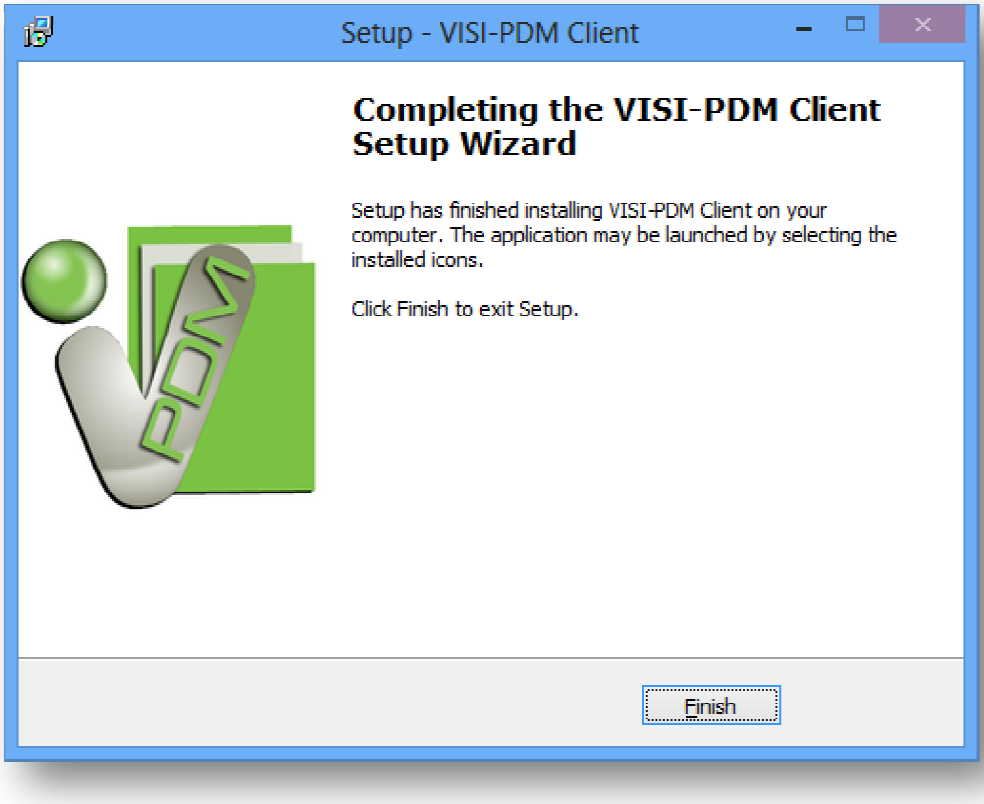
Press 'Next' to continue.

10. Pre-installation summary:



The installation routine will now display a pre-installation summary. If these settings are correct, press 'Install' to continue.

11. Installation complete:



Press 'Finish' to complete the installation routine.

12. Restart the computer and login again.

8. Files in the VISI PDM Program Directory

Program files:

VPDM.exe
VPDM.exe.manifest
PDMLogin.dll
LicProtector.dll
gdiplus.dll
VPDM'sprache'.dll

Installation routine for client workstations

Client-Setup.exe: This file is used to install the VISI-PDM client on workstations.

License file:

VPDM.lic: This file contains information on copy protection, number of concurrent users and a limitation of the time to use, if defined.

Configuration files:

VPDM.ini: This file contains all the information needed for starting the application. Databases with their corresponding details are stored within this file, of which are shown in a pull-down menu, displayed during login.

[Settings]	
Language=ENU	Language for installation.
[Datab-ase]	
Count=1	Number of databases in this file.
[Database 1]	
Name=MyDatabase	Name of the database.
ODBCDriver=SQL Server	Driver name for SQL access.
Server=MyServer	Name of the computer where the SQL-Server managing this database is running.
SQLUser=sa	User for SQL-Server authentication.
SQLPassword=1A2B3C4D5E6F	Password for SQL-Server authentication.
[Database 2]	
Name=PDMdemoENU	
ODBCDriver=SQL Server	
Server= RALPHMOBIL\VISIPDM	
SQLUser=sa	
SQLPassword=BWELVUQLOCOGHZBC	

User settings:

'username'.ini: These files contain all user depending settings, like last used window configuration, last used language, etc.

Script files:

Script\'scriptname'.txt: All information regarding pre-configurations are stored inside the script files. If the user chooses a pre-configuration file when creating a new database, the system will take this data into consideration too.

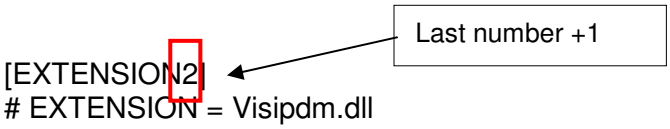
Help files:

VPDM'language'.chm: The help system for VISI-PDM. You will need Internet Explorer 4.x (or higher) installed to display/execute this file on your computer.

9. Enable the VISI-Series Integration

To enable the VISI-Series integration, add the following lines into the 'EXT.CFG' file within the 'System' directory of your VISI installation:

VISI 20



An example for the EXT.CFG file:

[EXTENSION20]
EXTENSION = Simula.dll
DATA_ID = 73D967FD4FAC4DC9857E863C7A744749 ; ID of the data record handled by the extension
LOAD_MODE = 2 ; Module Load Mode 1 = Preload, 2 = Load On Call

[EXTENSION21]
EXTENSION = visipdm.dll

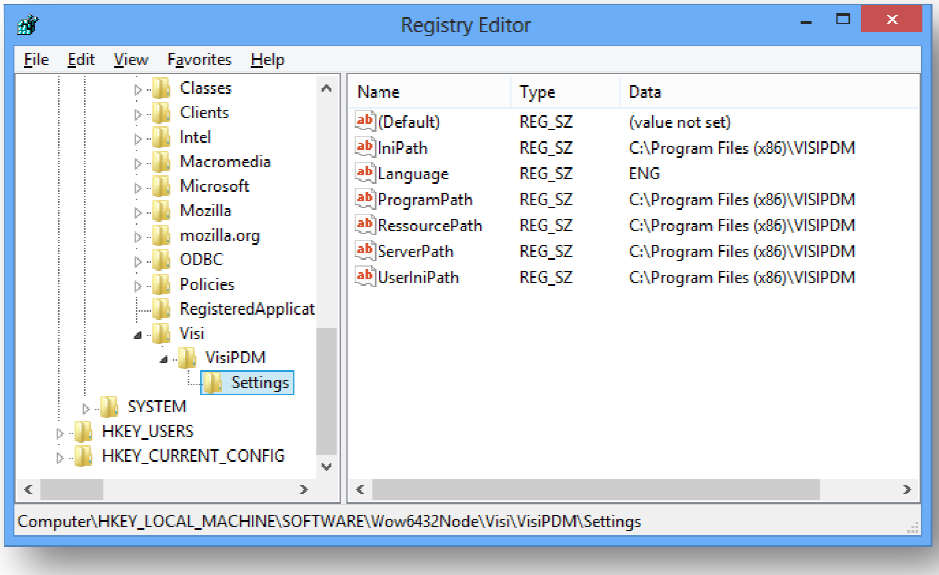
10. Settings for VISI-PDM in the Registry

64-Bit Windows:
HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Visi\VisiPDM\Settings

32-Bit Windows:
HKEY_LOCAL_MACHINE\ SOFTWARE \Visi\VisiPDM\Settings

ProgramPath:	Contains the path for the help files
IniPath:	Contains the path for the VPDM.ini file.
Language:	Contains the language for the login.
ProgramPath:	Contains the path for the program files
ResourcePath:	Contains the path for the VPDM'language'.dll files.
ServerPath:	Contains the path for the license file and script directory.
UserIniPath:	Contains the path for the 'Username'.ini file.

An example of the registry on a server/single seat:



An example of the registry on a client workstation:

