

MFG225551

A Tale of 2 Upgrades: Vault and Inventor

Traci Peurasaari
Autodesk

Chris Bluhm
Autodesk

Learning Objectives

- Learn how to prepare your environment for a Vault or Inventor upgrade
- Learn how to update Vault
- Learn how to deploy Inventor and Vault
- Learn how to migrate custom and standard Content Center libraries

Description

Do you struggle with performing and coordinating your Vault software and Inventor software installations? Do you struggle with how and when to install, upgrade, or migrate your custom or standard Content Center libraries? Stop playing “choose your own upgrade adventure,” and attend this class! We will help you plan a methodical upgrade and rollout. What is the recommended and required order of operations? Vault? Inventor? Client? Server? This class will include how to update custom Content Center libraries while still having them available for the current drawings and adding new standard libraries. We will show you how to upgrade and migrate your Vault databases. We will discuss tips on using enterprise software deployment tools to update all clients in your organization. By the end of this class, you will be fully armed and ready with all the knowledge you need to upgrade your Vault and Inventor environment.

Speaker(s)

Traci Peurasaari - Over 25 years of relational database experience in Microsoft SQL Server and Oracle. Proficient in Database performance and tuning, backup and restore, replication and various and other areas of Database support and administration. This knowledge allows me to be better able to support my customers in their Vault Rollouts, upgrades, maintenance, troubleshooting, and migrations. My experience spans multiple industries from manufacturing to advertising to finance. Regardless of my title, Customer Service especially as it pertains to the Database, has been my passion. Being part of the Autodesk team as a DSS supporting Vault allows me to continue following that road.

Chris Bluhm - Over 15 years of experience as a Tier 3 IT administrator. He has a deep breadth of experience administrating corporate networks, Microsoft SQL Server, VMWare, and large environments. He joined Autodesk, Inc., in 2014 as a product support specialist supporting Vault software and the Data Management Team. He uses his knowledge of Vault software and enterprise systems to help support large customers as they rollout, upgrade, and maintain Autodesk products

Prepare your environment for a Vault and Inventor Upgrade

- Planning your Upgrade and Rollout
- what to think about - Information to gather
 - Hardware specifications
 - Know what versions work together and how
 - What version are you using/going to
 - Determine the related OS/SQL requirements
 - [Inventor 2019 Requirements](#)
 - [Vault 2019 Requirements](#)
 - are you replicated
 - can the upgrade be completed in one weekend?
 - what file format are your files in
 - Remember the thin client
- Don't forget to allow time to fully test your upgrade.

Proper planning and advance preparation are the best defense against the unexpected during upgrade.

Versions

It is important to note that Vault only allows upgrades of two versions at a time. If you are upgrading more than two releases you will need to do your upgrade in steps, which has the added complexity of verify software compatibility for the interim and final releases.

Hardware and Software

Whether doing an in-place upgrade or moving to new servers it is important to ensure that hardware and software meet the hardware and software requirements. For Software requirements, this includes the Operating System (OS) and SQL for the Vault server/s and OS for the vault and inventor clients.

Order of Operations for your upgrade

- Vault Server environment
 - always enable the option to download and apply Service Packs.
- Inventor installation
- Vault Client installation

The order of operations is important. Installing the Inventor client prior to the vault client will save time by ensuring the correct add-in is installed. You will need to pay attention to your versions

Vault Server

When upgrading a replicated or multi-site environment the publisher must be upgraded first, then the subscriber/s. If moving to new hardware, you will need to allow for time for the servers to replicate and the filestore to validate.

Client order

Beyond installing the Inventor client before the Vault client, it is important to note that the two must be the same release. You cannot upgrade just inventor or just vault on the client workstation.

Vault upgrade and DB migration

- Be prepared know what to expect
- what to have ready
- accounts and passwords – ask us about custom sa passwords and accounts (new!)
 - Download your [software](#) and all updates and hotfixes
 - [Inventor 2019 Updates](#)
 - [Vault 2019 Updates](#)
- do you need in place or new servers?
- Do you need to upgrade you SQL version/s

Upgrade Day

Backup Backup Backup – make sure you have a valid backup – you will need it if going to a new server and you will want it if doing an in-place upgrade. Before you start make sure you know the usernames and passwords of the account you will need (Vault Impersonation, SQL Services, SA or starting with 2018 another SQL account that is a SYSADMIN, and the Vault User account). Download all the necessary software and verify your SQL Version. You are now ready to go.

Deploy Inventor and vault

- How you can create packages
 - Autodesk package creator
 - SCCM
 - Group policy
 - batch files
- Licensing and environmental Variables
 - flex timeout
 - adsk license variable
 - AER

When deploying vault and Inventor there are three issues that often cause problems: timing, installation method, and licensing.

Timing

Many customers struggle with the timing of deployments. Should you wait until the weekend of your upgrade to push out installation files? How can you set them up early? Is there a special order to how the programs need to be installed?

For the first two questions its very dependent on the size and speed of your network and user base. A common element in successful deployments is the tendency to push all program installers to workstations early or perform early installs of programs but hid them from the end user. It is much easier to deploy an install package and then have it run after a successful backend upgrade then it is to hide installed programs from a user. Some things to consider when hiding or pre-installing is shortcuts and file associations.

Also, as highlighted above you must remember to always deploy inventor first and then the vault client so that the add in will be successfully installed

Installation Method

There are several supported ways to deploy Autodesk software including, SCCM, Group Policy Deployment, and using the Autodesk deployment tools. Contact your EPS team for assistance and we have specialists who can assist.

The most important issue to remember is that ALL Autodesk Software requires local Administrative privileges on installation and first run. Many organizations use a service account to facilitate this.

Environmental Variables

When deploying Autodesk software, it is important to consider creating environmental variables to assist the running and execution of the software. At the minimum you should use [ADSK_FLEX_LICENSE](#) to all computers so that users do not need to input a license file and to

assist with deployment. If you have a large wan network with high latency connections in some offices, you should also consider adding the [FLEXLM TIMEOUT](#) to computers to make sure they will not timeout when trying to connect to a distant license server.

Also make sure to talk with your EPS team to enable Automatic Error Reporting and Enhanced Meta data on your license usage to assist with tracking where and how Autodesk software is being used and ways to decrease downtime.

Update Inventor Content Center Libraries

After you update your Vault you will be prompted to [migrate all existing libraries](#) on first login. A common misconception is that this updates your actual libraries. This is false, migrating your libraries ONLY makes previous version COMPATIBLE with the current version of vault. YOU STILL MUST INSTALL THE [CURRENT YEAR INVENTOR LIBRARIES](#) AS DESIRED.

Custom content center libraries only need to be migrated.

The best corollary to think of this is with the vault client and existing versions of Inventor. Even though you install a new version of Inventor on your computer it won't work unless it and the Vault Client are sync'd together. Migrating previous years inventor libraries only ensures that the current year can access those files.

What's next

Everything is upgraded now what?

- Update inventor files using the job processor to update all parts to the newest libraries
- Check your DR Plans to make sure they are still valid
- Check maintenance plans

Additional Links

[Migrating Your Autodesk Vault Server using ADMS Backup and Restore](#)

[Migrating Your Autodesk Vault Server using ADMS Detach and Attach](#)

[Introduction to upgrading Vault](#)

[Restoring Your Vault: Real-World Tools for Restoring Your Data](#)

[Vault Preventative SQL Maintenance – Maintaining a healthy database](#)

[Vault and Inventor Libraries](#)