

Migrating Autodesk Inventor Data in Autodesk Vault

Autodesk® Inventor™ file migration can be performed either on a per file basis or with a batch process. Certain considerations must be taken into account to ensure proper migration for files stored in Autodesk® Vault software. This document outlines the steps to analyze, prepare, migrate, and validate the Inventor files.

Under most circumstances, it is not necessary to migrate files with each new release. However, if you choose not to migrate files, two areas may be affected:

- **Performance**—Any file that is in the Autodesk® Inventor™ 11 format or later does not require migration to open it. This means that data left in the Inventor 11 format has no adverse implications on the performance of the Open function. For most small to medium-sized assemblies, the effect on Open is not noticeable enough to justify migrating to the Inventor 11 format. Inventor files in earlier formats should be migrated for best performance results.
- **Migration of iParts and iAssemblies**—iParts and iAssemblies should be migrated to the latest release when used in your daily workflow. Because of internal restrictions in Autodesk Vault, you cannot use the Copy Design, Rename, Replace, and Edit Properties commands on these files without having them in the latest release.

If you choose not to migrate files, you need to install the following hotfix, which helps ensure uninterrupted use of Autodesk Vault.

- **Hotfix TS1064910**—A hotfix that addresses how Autodesk Vault 5 interacts with unmigrated files called “Allowing Copy Design, Rename, and Edit Properties Without File Migration” was released in February 2007. With this hotfix, you no longer have to migrate a file to the latest release before performing the operations listed earlier. With the exception of iParts and iAssemblies, data can be left in its unmigrated format in a vault. For more information on this hotfix, visit <http://usa.autodesk.com/getdoc/id=DL8880094>.

If you chose to migrate your Inventor data from within Autodesk Vault, you should start by migrating any library part files, then library assembly files, library presentation files, and drawings in library folders if applicable. The migration of non-library files follows the same method: parts, then assemblies and presentations, and finally drawings. This method provides an accurate and structured migration of Inventor data stored in a vault.

Software

Inventor file migration from Autodesk Vault requires the following applications:

- Autodesk® Inventor™ Series 11 or Autodesk® Inventor™ Professional 11
- Task Scheduler
- Design Assistant
- Vault Explorer Client

Vault Explorer File Preparation

All files must be checked into the vault before the analysis process can begin. Run an advanced search for files checked out. Saving this search for later use makes it easier to find files that are checked out should this task take longer than expected.

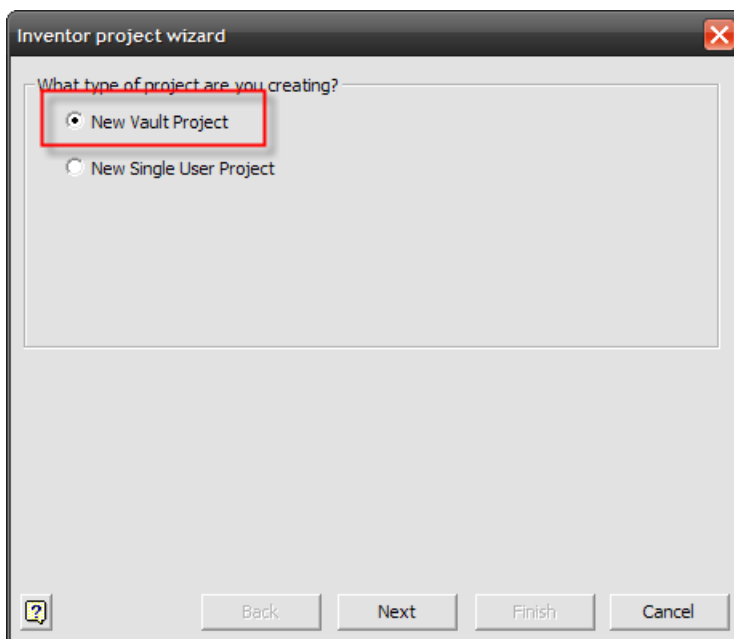
Once all files are present and accounted for, run the Get Latest command on all top-level library folders. Running this command reduces the impact to Task Scheduler to get the files when migrating from a vault. A quick check from Autodesk® Vault Explorer on file status indicates whether copies are local.

Note: Always make sure you have a current backup before starting this work.

Task Scheduler Migration—Library Project File

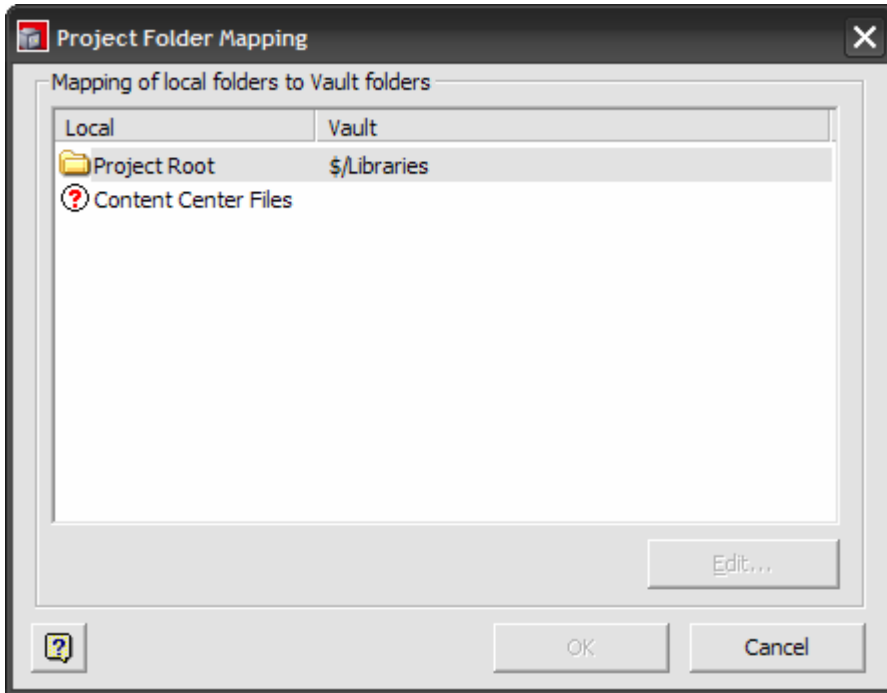
Before the Task Scheduler is set to migrate the library files in Vault, an Inventor project file (.ipj) is created to declare those files as non-library files. This temporary file is used for the purposes of library file editing, such as migration. This new IPJ file will reside directly under the Library top folder.

1. Launch Autodesk Inventor.
2. In the Inventor Project wizard, click New Vault Project.



MIGRATING AUTODESK INVENTOR DATA IN AUTODESK VAULT

3. Name the project Libraries.
4. Set the *Project (Workspace)* folder to the top-level *Libraries* folder.
5. Click Finish.
6. Make sure you are logged into the Autodesk® Data Management Server.
7. Click File > Vault > Map Folder.
8. Set the project root to $\$/Libraries$ (you do not need to map Content Center files).



9. Click OK.
10. Manually add the new *Libraries.ipj* to the vault directly under the top-level *Library* folder.

Task Scheduler Migration—Library Folders

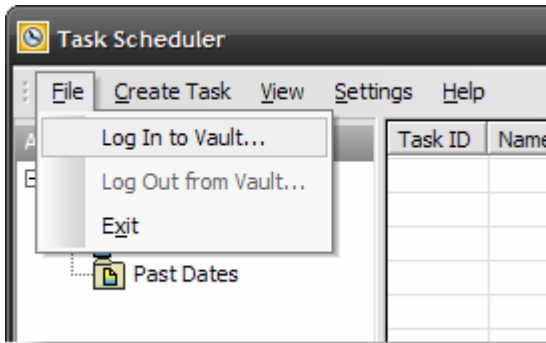
For a vault-wide migration of Inventor files, migrate the libraries first. Within the *Library* folders, part files typically outnumber assemblies. You can use Task Scheduler to migrate these Inventor files directly from Vault. This sequential process checks out the file, migrates, and checks the file back in. With each migration, Task Scheduler generates a log file. The first group of files to be migrated should be the library files, specifically the Inventor part (IPT) library files. After the IPT files are migrated, move on to Inventor assembly files (IAM) that are in the library paths. Note that the *Libraries.ipj* treats these Inventor files as normal Inventor parts, not as libraries.

Migrating Files from Vault

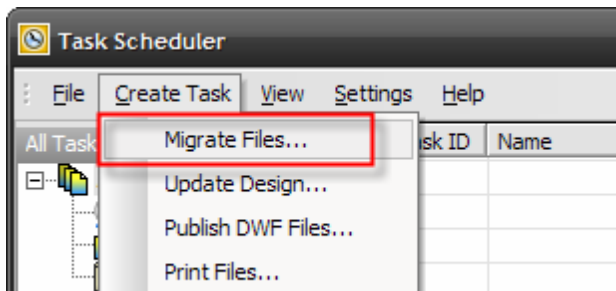
1. Log in to Vault Explorer. Perform a Get Latest on the *Library* folder to ensure there are local copies of the files.
2. Open Task Scheduler.

MIGRATING AUTODESK INVENTOR DATA IN AUTODESK VAULT

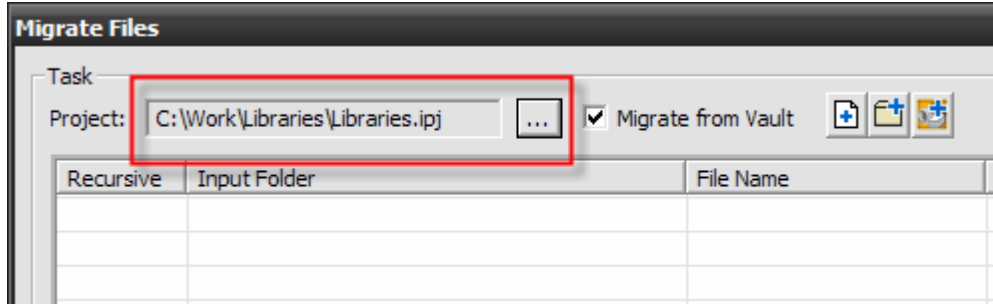
3. Click File > Log in to Vault.



4. Click Create Task > Migrate Files.

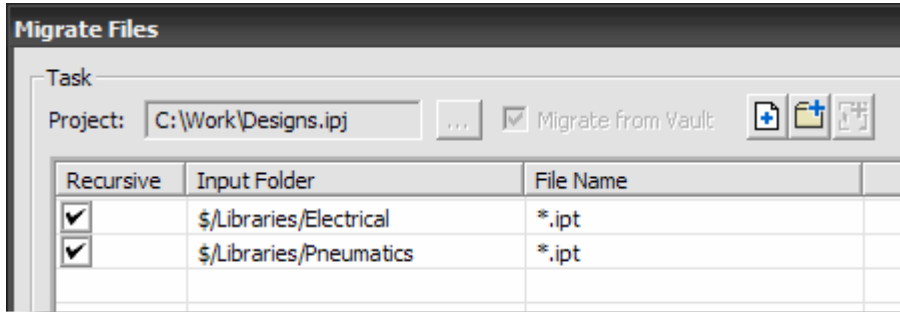


5. Select the *Libraries.ipj* file created previously.

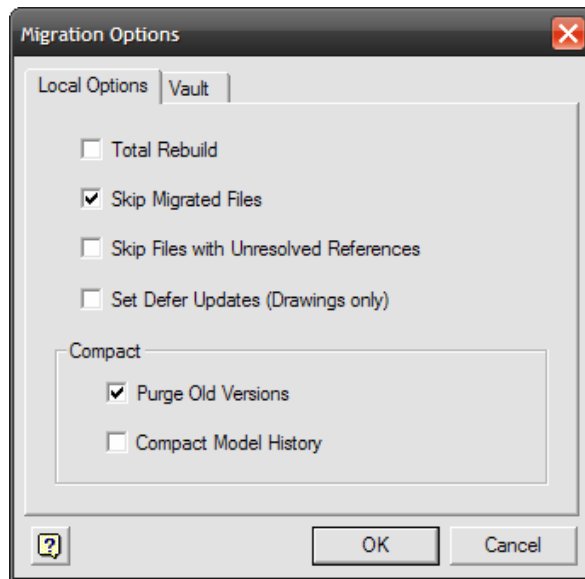


6. Ensure that the Migrate from Vault check box is selected.
7. There are three options for selecting data sets. Click Add Folder.
8. Choose a top-level library folder (for example, *Library Electrical*, *Library Hydraulic*). You can add more than one folder to the task, but note that the process can be broken down into smaller data sets by adding smaller folders to ensure tasks complete successfully.
9. Click OK.
10. Select *.ipt from the files type list, located to the right of the input folder under File Name.

MIGRATING AUTODESK INVENTOR DATA IN AUTODESK VAULT

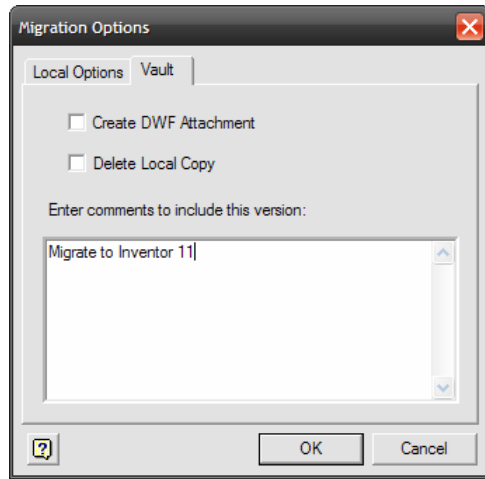


11. Select the Immediately check box.
12. Click Options.
 - a. On the Local Options tab, only Skip Migrated Files should be selected. Optionally, you can select the Purge Old Versions check box.



- b. On the Vault tab, Choose whether or not you would like to optionally publish DWF™ files by selecting the Create DWF Attachment and Delete Local Copy check box.
 - c. Click OK.

- d. Enter Migrate to Inventor 11 in the comments field.



13. Modify the name of the log file. Change the name to correspond with the folder and process (for example, *Migrate Library Electrical*). Note the file location.
14. Start the migration process. A progress bar in Task Scheduler indicates that the task is under way.
15. When the task ends, right-click the task. Click Create Report. Choose the same location as the log files generated earlier. This creates a report in HTML format that summarizes the results of the task.
16. Repeat steps 4 to 16 for migration of assembly (IAM) files, then drawing (IDW) files if applicable. Be sure to select the Skip Migrated Files check box as the parts (IPT) will have already been migrated.

Task Scheduler Migration—Non Library Folders

Continuing a vault-wide migration of Inventor files, after the libraries are migrated, the same policy holds with non-library files. As with libraries, part files typically outnumber assemblies. Use the Task Scheduler in the same way to migrate these Inventor files directly from Vault.

Like the previous process on library files, this is a sequential process that checks out the file, migrates it, and checks it back in.

Validating Your Results

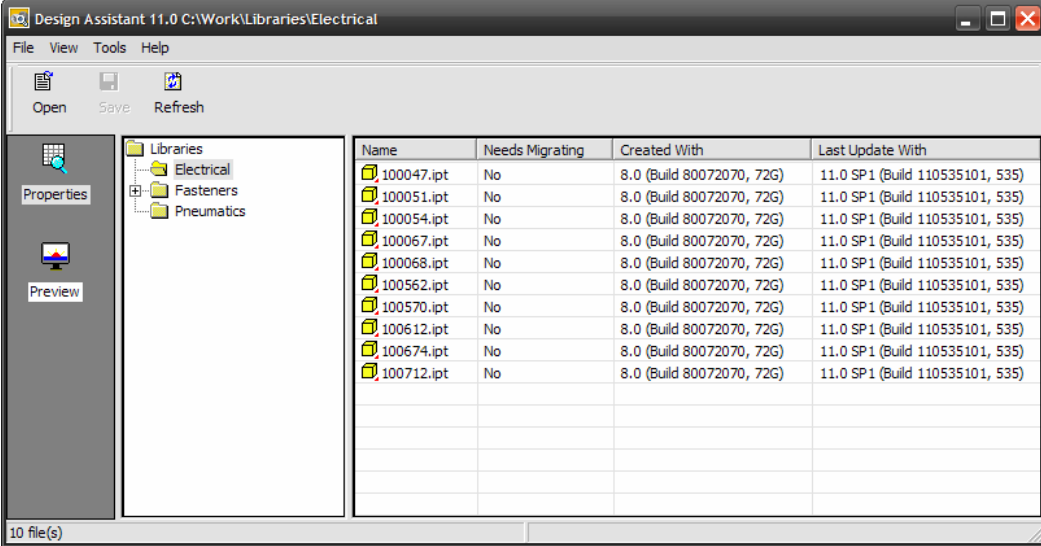
Use Design Assistant to validate the results of the migration process. By configuring the Design Assistant to view columns relevant to migration, you can see whether any files were not processed properly. Click View > Customize to add the following columns to your view:

- Needs Migrating
- Created With

MIGRATING AUTODESK INVENTOR DATA IN AUTODESK VAULT

- Last Updated With

If you missed any files, you can create additional tasks or perform a manual migration by opening the file in Inventor and checking it out manually, saving it, and checking it back in.



The screenshot shows the Design Assistant 11.0 interface for the Electrical library. The table lists files with their names, migration status, creation version, and last update version.

Name	Needs Migrating	Created With	Last Update With
100047.ipt	No	8.0 (Build 80072070, 72G)	11.0 SP1 (Build 110535101, 535)
100051.ipt	No	8.0 (Build 80072070, 72G)	11.0 SP1 (Build 110535101, 535)
100054.ipt	No	8.0 (Build 80072070, 72G)	11.0 SP1 (Build 110535101, 535)
100067.ipt	No	8.0 (Build 80072070, 72G)	11.0 SP1 (Build 110535101, 535)
100068.ipt	No	8.0 (Build 80072070, 72G)	11.0 SP1 (Build 110535101, 535)
100562.ipt	No	8.0 (Build 80072070, 72G)	11.0 SP1 (Build 110535101, 535)
100570.ipt	No	8.0 (Build 80072070, 72G)	11.0 SP1 (Build 110535101, 535)
100612.ipt	No	8.0 (Build 80072070, 72G)	11.0 SP1 (Build 110535101, 535)
100674.ipt	No	8.0 (Build 80072070, 72G)	11.0 SP1 (Build 110535101, 535)
100712.ipt	No	8.0 (Build 80072070, 72G)	11.0 SP1 (Build 110535101, 535)

Summary

Although migration is not required from one release of Autodesk Inventor software to the next, it does provide certain advantages. The process described here can be used to migrate all of your data, but it is by no means necessary. Regardless of the approach you choose, be sure to have a well-defined plan and a current backup before attempting to migrate your data.

Autodesk, Autodesk Inventor, DWF, and Inventor are registered trademarks or trademarks of Autodesk, Inc., in the USA and/or other countries. All other brand names, product names, or trademarks belong to their respective holders. Autodesk reserves the right to alter product offerings and specifications at any time without notice, and is not responsible for typographical or graphical errors that may appear in this document.

© 2007 Autodesk, Inc. All rights reserved.