

Checklist for New Inventor Install

The process for installing the new release of Inventor can be confusing for many of our customers – what needs backing up, uninstalling or migrating to make the process as smooth as possible? Follow this checklist from start to finish to minimise headaches associated with this once-yearly process.

Note: This list is intended as a guide only – install requirements may vary – always contact us if unsure.

CAD Managers, CAD Administrators

Please note – this document does not deal with licensing a new install of Inventor or activation of the software once installed. Contact our customer services team for licensing or any Autodesk Subscription Center questions.



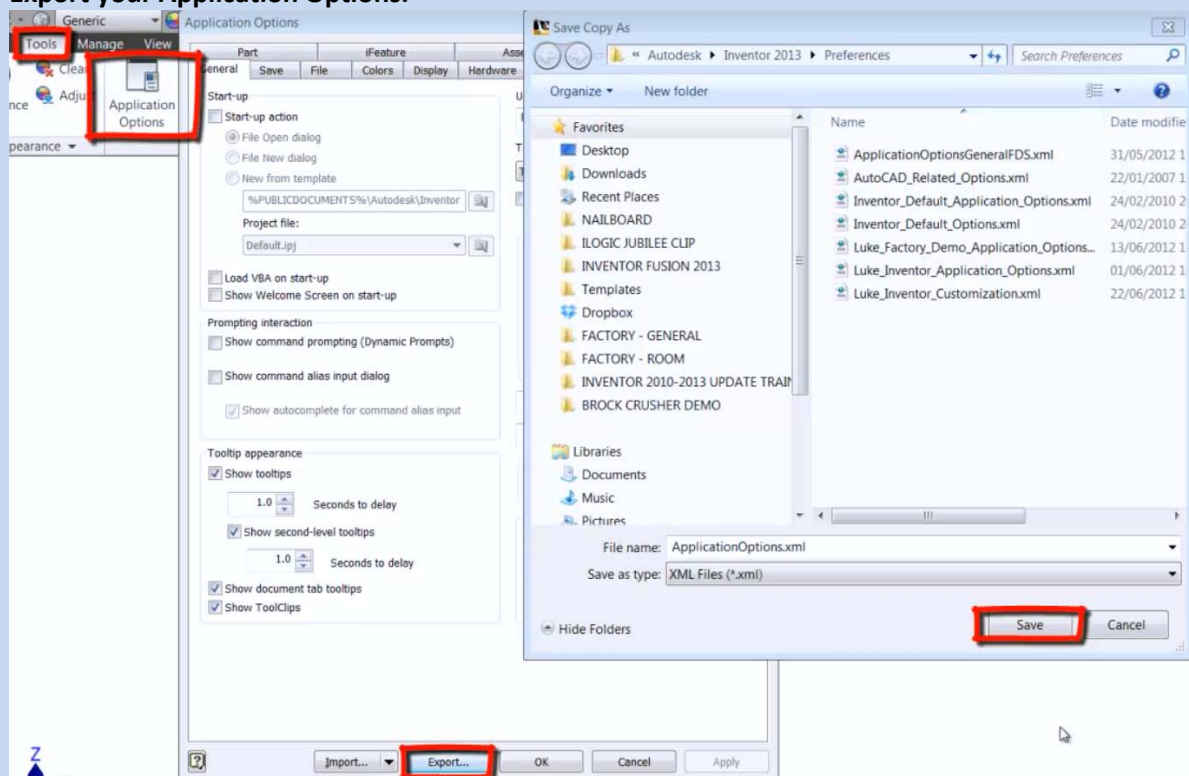
Read the CADline White Paper (published on the software release day) to quickly familiarise yourself with the most important new features in the Inventor release. Follow this link to our 2013 document.
[What's New in Inventor 2013 pdf](#)



Install any important Windows Updates. To do this type 'update' in the start search bar and select Windows Update. Make sure you install at least the 'Important' updates, and restart the computer if necessary when prompted.

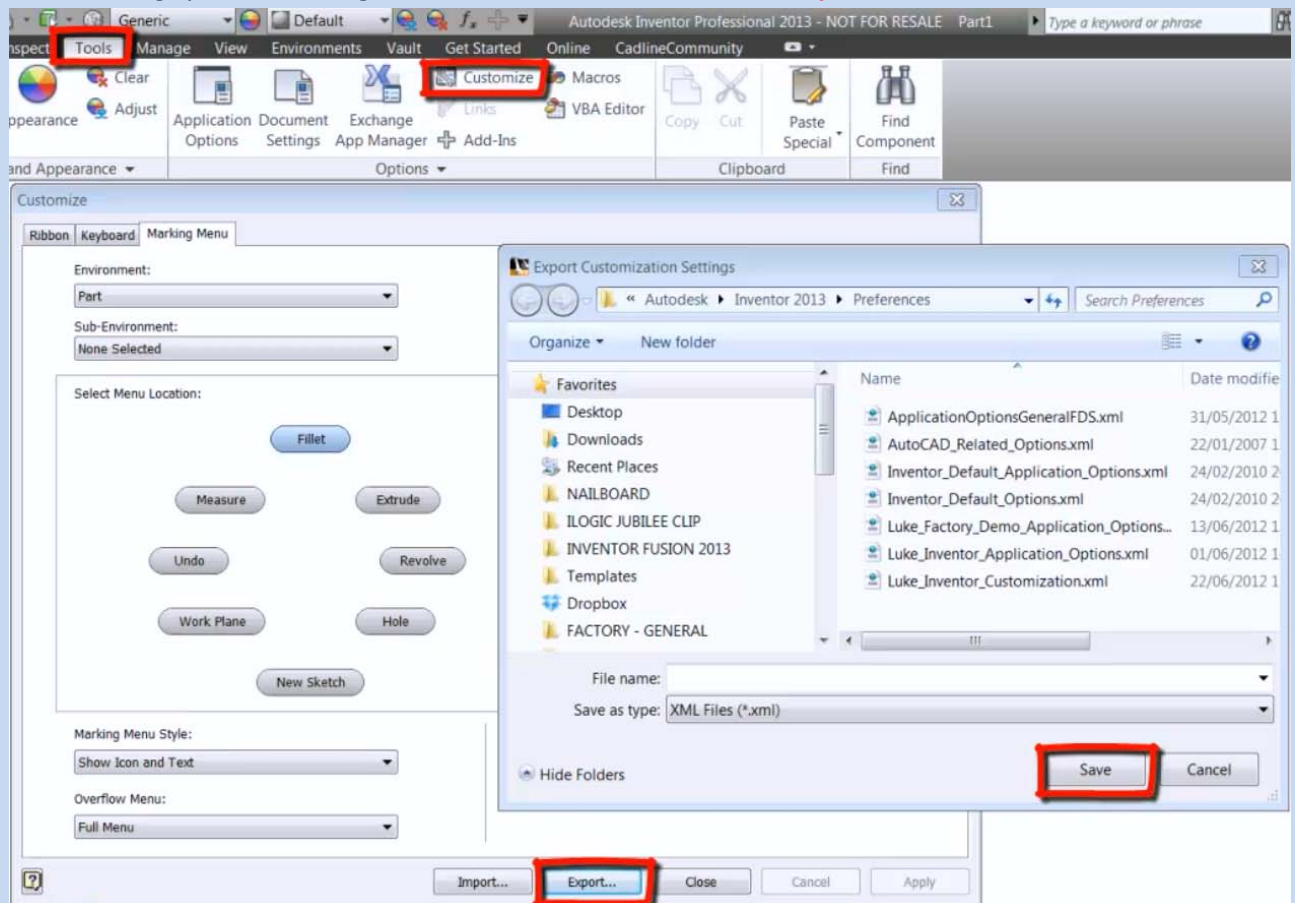


Export your Application Options.



Continued:- You can export your Inventor Application Options settings as shown above, and import in the new install to avoid having to reapply all your settings. *(Note – unfortunately this may not work for some new releases, as Autodesk will occasionally change the file format of the customization xml file)*

Export your Customizations – You can also export & import any ribbon, keyboard shortcuts and marking menu settings you have changed as shown below. *(Note – this is subject to the same caviat as above)*



Run the Install of Inventor. Ensure each workstation meets the recommended spec for Inventor for best performance. Ensure that you select the correct default units (for Inventor 2012 and earlier), and install all the required Content Center libraries.

Migrate your Design Data.

If either **a)** or **b)** apply to you then you will need to migrate your old Design Data (instead of using the default Design Data that will be installed with the new release).

a) You have added new thread types in thread.xls or clearances in clearance.xls

b) You have created new custom colours or materials (Inventor 2012 or earlier – these are contained in the Appearance and Material libraries from Inventor 2013 onwards)

If either of the above applies then refer to the following article from Autodesk:

Continued:- [Design Data \(Style Library\) Migration](#)

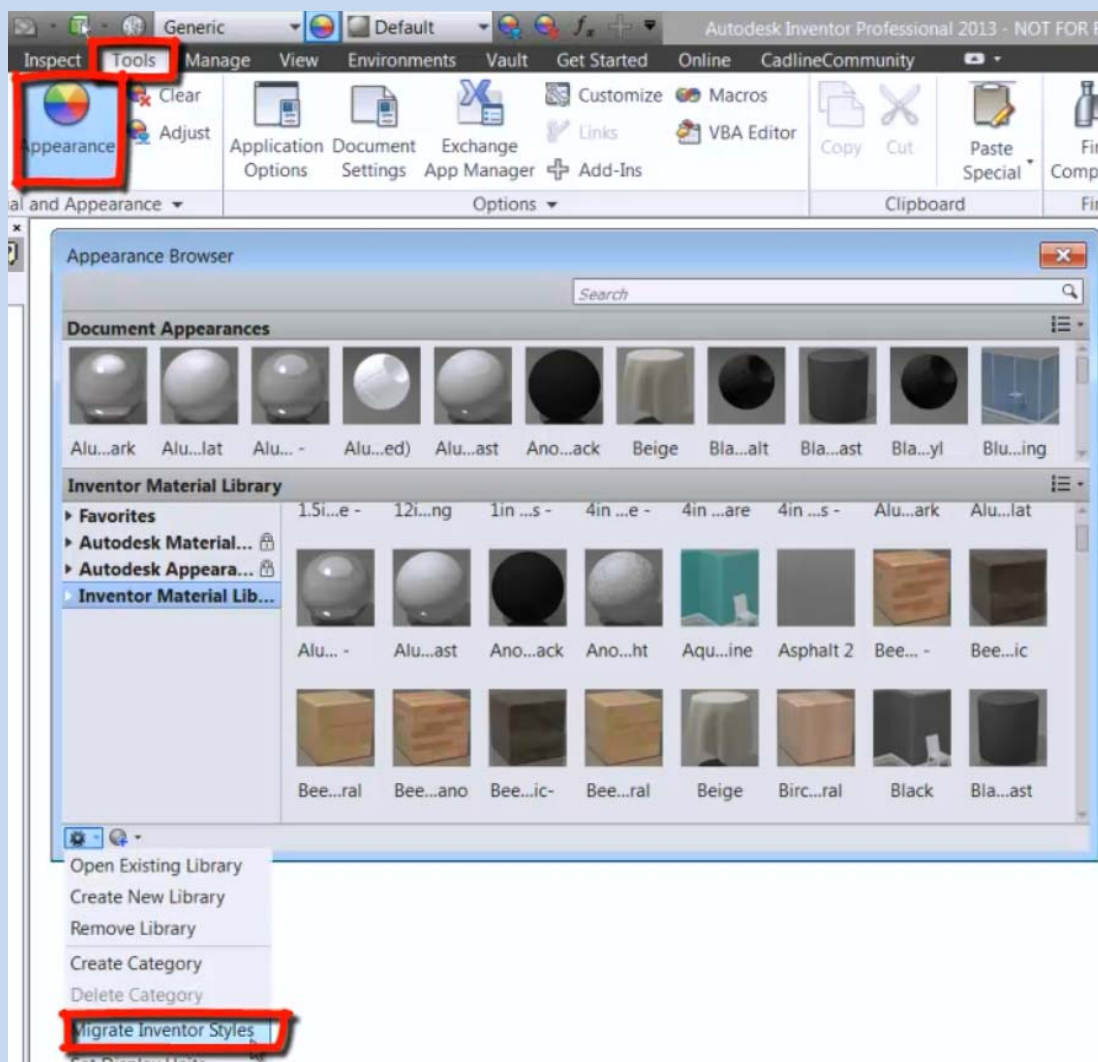
Important: Always create a backup of your Design Data before migrating.

Note: When migrating Design Data from 2012 to 2013 the 'migrate' button in the Style Library Manager may be greyed out, preventing migration in the usual way. If this is the case, rename the lighting.xml (e.g. to lighting-new.xml) and reopen the Style Library Manager – the 'migrate' option should then be available.

If **a)** or **b)** above do not apply, then migration is not necessary, and the default installed Design Data for the new release should be used. Copy this from C:\Users\Public\Documents\Autodesk\Inventor 20XX to a shared network location if required (and remember to update the project file path accordingly).

Migrate Appearance and Material Libraries (2013 Onwards Only)

From 2013 onwards custom colours and materials are saved in these libraries and not in the Style Library (Design Data). If you have created new materials or colours and added them to the Inventor Material Library or your company custom material library, these can be migrated easily through the Appearance Editor as shown below. **Important:** Create a backup before migrating.





Migrate your Inventor files (.ipt, .iam, .dwg, .idw, .ipn etc)

Decide between these two methods:

- a) **Explicit Migration** - The Task Scheduler can migrate all your Inventor data to the new release in one hit. Use this method if you have large assemblies or use derived parts. See detailed instructions for using the Task Scheduler here:

[Migrate Files Using Task Scheduler](#)

- b) **Implicit Migration** - Inventor will automatically migrate opened files upon save in the new release. Untick the 'prompt to save for migration' option in Tools – Application Options to ensure this occurs. Be aware that using this method can allow your unopened legacy data to become several releases out-of-date.

Important: always create a backup of your Inventor files before migrating.

Note: Don't forget to migrate any custom iFeatures you have created. The default location for these is here:

`C:\Users\Public\Documents\Autodesk\Inventor 20XX\Catalog`

First copy all your custom iFeature .ide files to the 'Catalog' location for the new release, and then use the task scheduler to migrate them (or simply open them directly and save if only a few exist).



Migrate your Content Center.

There are two main steps to migrating your Content Center:

- 1) **Migrate the libraries used to generate the Content Center files.**
- 2) **Migrate the generated Content Center files.**

1) Migrating the Libraries:

If you are using Vault - refer to this Autodesk skill builder detailing the correct process for migrating your Content Center:

[Content Center: Migrate Libraries and Update Associated Inventor Files](#)

If you are not using Vault – refer to this excellent article.

[Content Center: Migrate Libraries](#)

2) Migrating the Files:

Continued:- The article below details very helpfully the process of bringing all your generated Content Center files into the correct folder location for the new release and then correctly migrating them.

[Migrating Content Center Files](#)



Make Your Company Templates Available. Ensure that you copy your company templates (ipt, iam, dwg, idw etc) into the correct location as referenced by the company project file (see Folder Options – Templates in the project file). These can then either be migrated using the Task Scheduler or opened individually and saved.



Uninstall the Current Version of Inventor (Optional). It is not essential to uninstall the current version of Inventor as two (or more) releases can be successfully run side by side (although files saved in the newer version cannot be opened in the older version). If you will have no need for the older version then consider uninstalling it at this point to simplify file associations and free-up disk space.

For Inventor 2010 & 2011:

[Clean Uninstall of Inventor 2010 or 2011](#)

For Inventor 2012 Onwards:

[Clean Uninstall of Inventor 2012](#)



Install Correct Graphics Card Drivers and Hardware Database. This is an excellent time to check that you are using the latest Autodesk certified graphics drivers. Refer to the CADline White Paper below. Don't overlook installing the latest graphics hardware database files as detailed in the white paper.

[Instructions for Graphics Drivers](#)



Download Help Files (Optional). By default, hitting F1 for Inventor Help will take you to the Wikihelp pages. If you want the complete help files to be available when no internet connection exists then download them to your C drive here:

[Inventor 2013 Help and Tutorial Files](#)

[Inventor 2012 Help and Tutorial Files](#)

You can also download the full tutorial sample files. These were included with the software install for 2011 and previous releases, but require a separate download for 2012 onwards.



Check for Service Packs and Hotfixes. Autodesk regularly release updates and patches to correct any glitches and bugs in the software. If you are experiencing a problem then it is worth checking the list of hotfixes here to see if the problem has been addressed. Always ensure that you have installed the latest service packs. [Autodesk Inventor Updates \(All Releases\)](#)



And Don't Forget to Download and Install Your Favourite CADline Inventor Apps [Here](#)