

Autodesk Vault Upgrade Guide

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Introduction to Upgrading Vault

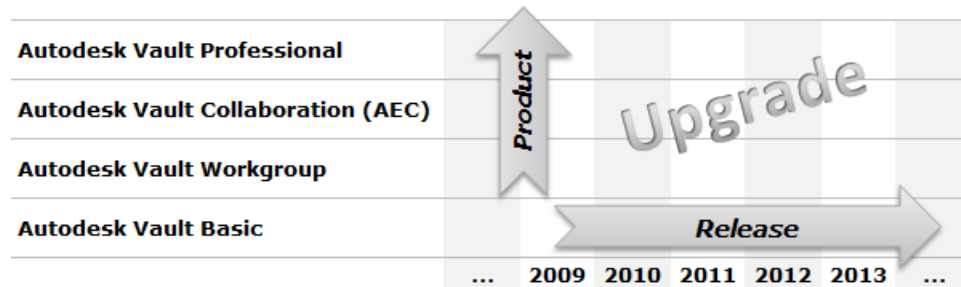
1

This upgrade process applies to all Autodesk Vault product editions. Details are provided for releases 2009 and higher, however the general process can be applied to all releases.



An upgrade may mean a newer release, a higher product edition, or both. When upgrading, upgrade to the highest release first and then upgrade the product edition.

For example, if moving from Vault Workgroup 2014 to Vault Professional 2016, first upgrade the release to Vault Workgroup 2016 and then upgrade the edition to Vault Professional 2016.



The migration process for an Autodesk Vault environment is composed of five stages: validate backup, upgrade SQL, upgrade Vault server, upgrade clients, and create backup. The number of steps within each stage varies depending on the existing Vault implementation.

The instructions in this document assume that you are familiar with common server administration tasks. At a minimum, you should be familiar with installing and uninstalling software on Microsoft Windows™.

Upgrade Assistance

If there are concerns or additional complexities in the Autodesk Vault environment, the best practice is to involve your Value Added Reseller or Autodesk Consulting. This is especially important when using clustered SQL or business line integrations with Vault.

Phase 1–Validate Backup and Test Migration

Autodesk recommends that every Vault upgrade start with a validated backup.



The following procedure for testing the upgrade is the preferred method for validating a backup.



Test Environment

The best practice is to perform a test upgrade of the Vault server on a machine that is similar to the production server. A test upgrade provides confidence that the backup is valid and identifies potential pitfalls with no impact on the production environment. Following is an overview of test environment benefits.

Test Machine Settings	Benefits
Similar CPU, memory, disk space	Provides an estimate of how long the migration can take. Gives insight into migration settings, such as time-out values to be changed. Exposes other configuration settings that may require changes.
Database	Test machines that need access to a vault that is 2 GB or more also need a similar

Test Machine Settings	Benefits
	version of full Microsoft™ SQL server installed.
Other applications that are installed on the production server	Test for compatibility with various proxy clients, firewalls, anti-virus programs, etc.
Operating System, Service Packs, firewalls, etc.	Compatibility testing.
Microsoft® Windows® Administration settings	Check for compatibility with Windows Domain policies, login scripts, permissions, and other settings.

If a test environment similar to production is not attainable, a low cost alternative is virtual machines like VMWare or Virtual PC from Microsoft. Virtual machines lack many of the benefits outlined above but are far better than not performing a backup and migration validation.

Restore Backup

Use the Vault server application to restore the production backup in the test environment.

Migration Timeout

If the migration stops because of a timeout error, the following steps will help resolve the issue. In the ADMS Console look in the Console log for today's date and search for 'timeout'. If a timeout error is found, perform the following steps.

Look in the ADMS log file to determine if the cause is a timeout:

C:\ProgramData\Autodesk\VaultServer\Filestore\ADMSConsoleLog-YYYYMMDD.txt

Search the log file from the bottom up for 'timeout.' If a timeout error is found with a time stamp matching the time of the stopped migration, perform the following steps:

- 1 On the Vault server, open Windows Explorer and navigate to C:\Program Files\Autodesk\ADMS Product 20__\Server\Web\Services.
- 2 Create a backup copy of the Web.config file.

- 3 Open the Web.config file with Notepad and look for the following line:

```
<timeouts connection="120" defaultCommand="360"  
longCommand="1800" />
```

NOTE The values may be different from those shown.

- 4 Double the existing values for defaultcommand and longcommand.

NOTE If the defaultCommand value is set higher than 1000, increase the executionTimeout value to an equal or higher value. This is found on the following line: <httpRuntime maxRequestLength="51200" executionTimeout="1000" />.

- 5 Save the Web.config file.

- 6 Open the ADMS console.

- 7 Perform one of the following sets of tasks:

- If a yellow bang symbol appears next to a Vault, right click the vault and select migrate.
- If no yellow symbol appears, close ADMS console and perform a build-to-build migration with the following steps:

- 1 Open a command prompt and navigate to the installed location of Connectivity.ADMSConsole.exe.

- 2 Run ADMS b2bmigrate operation in command line mode:

Example: Connectivity.ADMSConsole.Exe -Ob2bmigrate
-VUadministrator -VPadmin_password -DBUsql_user
-DBPsql_password Replace admin_password with the appropriate
administrator password for the -VP switch.

The last two command line parameters, -DBU and -DBP, are
required only if the sa password is not the default password.

Validate Restored Data

Verify the filestore and databases are complete and that the restored environment is operational. Use a client to verify the content and the Vault server application to verify the configuration.

Migration Test

Apply the processes detailed in this paper to the test environment. Using the test environment provides a safe option to experience the migration process and discover unexpected hurdles. Although this process takes time it can, in

the long run, save time and stress by avoiding impact to the production environment.

Phase 2–Upgrade SQL

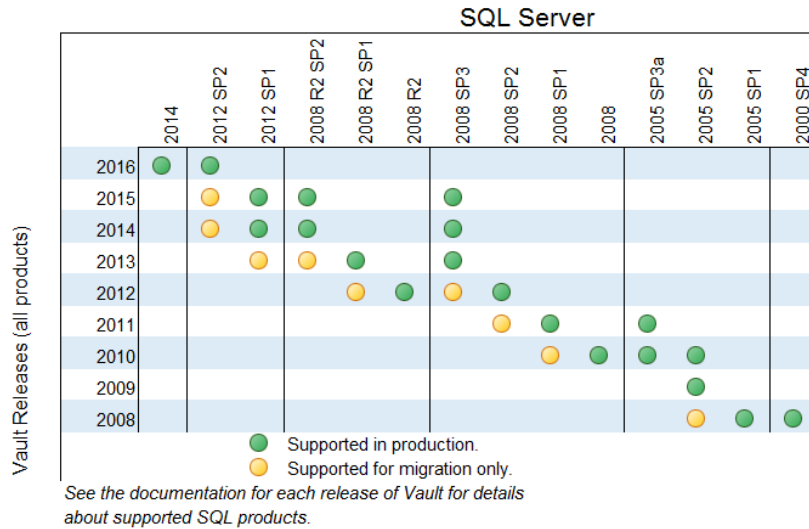
After you have validated your backup, upgrade your SQL to prepare for the Vault Server and Vault client upgrades.



The stage Validate backup should be completed prior to starting Upgrade SQL.

SQL Releases

The following chart summarizes the compatible releases of Vault and SQL with green dots. The yellow dots are the recommended upgrade path. Refer to the Vault System Requirements for your Vault release to ensure compatibility between Vault and SQL product editions.



If a SQL upgrade is necessary, refer to the topic specific to your environment for a summary of the most common scenarios. Complete SQL documentation is available from Microsoft.

IMPORTANT Prior to upgrading SQL, review the next section in this document: [Upgrade Vault Server](#) (page 18).

Upgrading Vault Server to Full SQL Server

When upgrading to the full version of Microsoft SQL Server, you must have permissions for the server and client systems, as well as to allow periodic system restarts. You should perform the upgrade in a test environment prior to performing the upgrade on the production environment. The client side systems are needed to verify that the upgrade has been performed successfully.

The server upgrade can be performed at any time after Autodesk Vault Server has been installed. The server may need to be rebooted one or two times during the upgrade process.

During the upgrade, the SQL server instance and the Autodesk Vault Server Services are shut down. Anyone logged into the vault at the time is automatically disconnected. Make sure all users are logged out of the Autodesk Vault Server. The upgrade will not affect the state of checked out files, nor will it modify the database structure, state of the files, or parent child relationships.

Before upgrading the SQL server, perform a backup from the Autodesk Vault Server Console application. For more information on backing up data, see the Autodesk Vault Server console Help.

Upgrade Microsoft SQL Express to Microsoft SQL Standard or Higher

Upgrade a SQL Express installation to a full version of SQL using a media which does not include a service pack, or higher, using one of the following methods.

NOTE A server console backup is recommended before performing either of these methods

Method One

- 1 Run the full version of SQL setup application.
- 2 Select **Maintenance > Edition Upgrade**.

- 3 Select the AutodeskVault instance and start the upgrade.
- 4 After the upgrade is complete, apply the latest SQL service pack since this upgrade actually does not have one and it is not transferred from SQL Express.

Method Two

- 1 Create a full backup of your vault using the server console. Note: In later steps, you delete all your vault databases. Validate that you can restore this backup on a test server before proceeding. Do not continue if your test restore fails. Correct any problems you have with the backup before continuing these steps.
- 2 After the test restore is successful, open the ADMS Console and delete all vaults and libraries listed. Then select Detach Master Vault from the Tools menu.
- 3 Make sure that all users are logged out of the vault.
- 4 Completely uninstall SQL Express, including the following applications in this order:
 - Microsoft SQL Server 2XXX Note: If you have more than one instance of SQL Express installed, be sure to uninstall only the AutodeskVault instance. DO NOT uninstall any other part of SQL after this step is complete.
 - Microsoft SQL Server 20XX Browser
 - Microsoft SQL Server 20XX Native Client
 - Microsoft SQL Server 20XX Setup Support Files
 - Microsoft SQL Server VSS Writer
- 5 Delete the SQL Express folders from Program Files (including data files). If your Vault databases are located on a different drive, be sure to delete the files in this location as well.
- 6 Install the full version of SQL with an AUTODESKVAULT instance as in the "Pre-install Microsoft SQL Server" section.
- 7 Install the Microsoft SQL release for your Vault product.

NOTE Refer to the chart on [this page](#) (page 5) or see your Vault System Requirements for which SQL release you should install.
- 8 Restore the backup that you created in step one using ADMS Console.

Microsoft SQL Express, upgrading

Upgrade MS SQL 2012 to MS SQL 2014

Follow these steps to upgrade MS SQL 2012 to MS SQL 2014.

Upgrade from SQL 2012 to SQL 2014

- 1 Download SQL 2014 Express from <http://www.microsoft.com>.
- 2 Select Installation and begin the Upgrade from SQL Server 2005, SQL Server 2008, SQL Server 2008 R2, or SQL Server 2012.
- 3 Continue through the pre-installation process. Pre-request files and services are updated. Setup Support Rules are processed.
- 4 On the Select Instance screen, select the AutodeskVault instance to upgrade and confirm instance settings. Click Next.
- 5 Accept the default features on the Select Features screen by clicking Next.
- 6 On the Instance Configuration screen, click Next.
- 7 On the Ready to Upgrade screen, click Upgrade. Setup will complete and upgrade the AutodeskVault SQL instance to SQL 2014.

Upgrade MS SQL 2008 to MS SQL 2012

Follow these instructions to upgrade MS SQL 2008 to MS SQL 2012

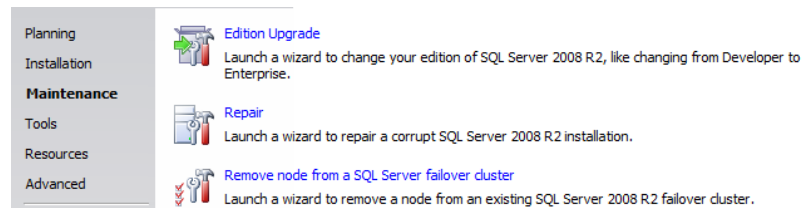
Upgrade from SQL 2008 to SQL 2012

- 1 Download SQL 2012 Express from <http://www.microsoft.com>, or insert your Vault installation media and go to <MEDIA>\\Support\\Sql2012Express.
- 2 Select Installation and begin the Upgrade from SQL Server 2005, SQL Server 2008, or SQL Server 2008 R2.
- 3 Continue through the pre-installation process. Pre-request files and services are updated. Setup Support Rules are processed.
- 4 On the Select Instance screen, select the AutodeskVault instance to upgrade and confirm instance settings. Click Next.
- 5 Accept the default features on the Select Features screen by clicking Next.
- 6 On the Instance Configuration screen, click Next.
- 7 On the Ready to Upgrade screen, click Upgrade. Setup will complete and upgrade the AutodeskVault SQL instance to SQL 2012.

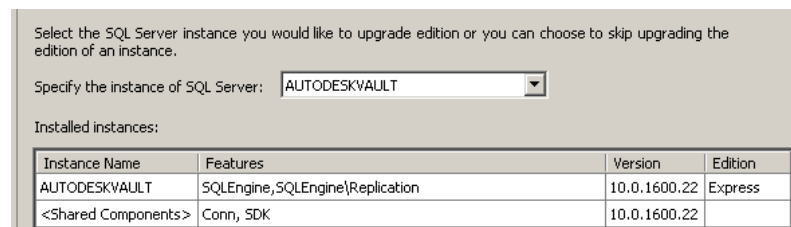
Upgrade MS SQL Express 2008 R2 to Full MS SQL 2008 R2

Follow these instructions to upgrade MS SQL Express 2008 R2 to full MS SQL 2008 R2.

- 1 Launch Setup from the Full SQL 2008 installation media. Select the Maintenance option, and begin the Edition Upgrade wizard.



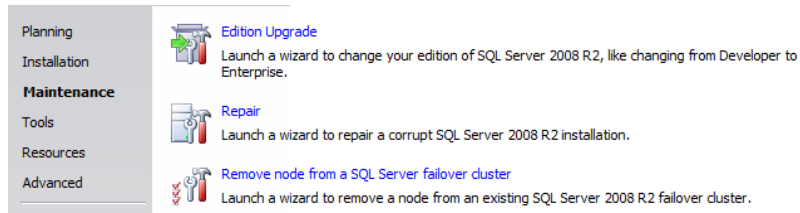
- 2 Verify version and or product key for Full SQL 2008. Proceed to the Select Instance window, and choose the AutodeskVault instance.



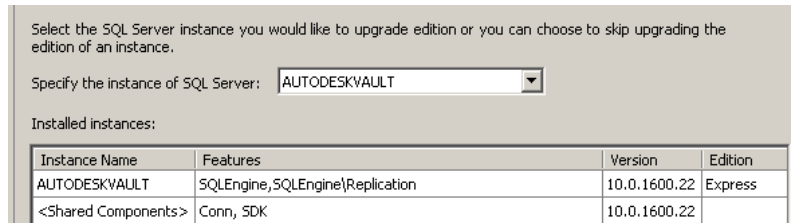
Upgrade MS SQL Express 2008 to Full MS SQL 2008

Follow these instructions to upgrade MS SQL Express 2008 to full MS SQL 2008.

- 1 Launch Setup from the Full SQL 2008 installation media. Select the Maintenance option, and begin the Edition Upgrade wizard.



- 2 Verify version and or product key for Full SQL 2008. Proceed to the Select Instance window and choose the AutodeskVault instance.

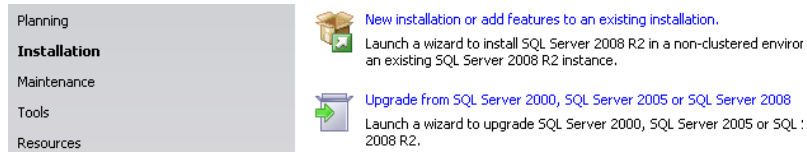


- 3 Upgrade the Instance. Once the instance has been upgraded, you can install the SQL Management Studio by returning to the "Installation" option and being the New SQL Server stand-alone installation or add features to an existing installation wizard.
- 4 Download and apply SQL 2008 SP2 if needed.

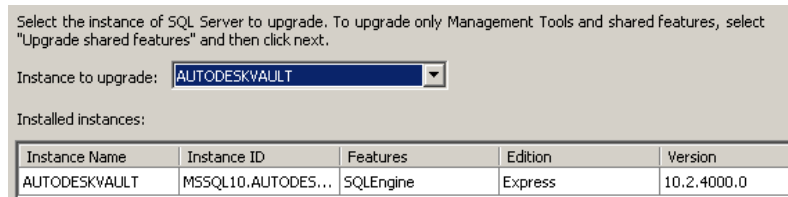
Upgrade MS SQL Express 2008 to SQL Express 2008 R2

Follow these steps to upgrade MS SQL Express 2007 to MS SQL Express 2008 R2.

- 1 Launch Setup from the SQL Express 2008 R2 installation media. Select the Installation option, and begin the Upgrade wizard.



- 2 Select the AutodeskVault SQL instance.



- 3 Upgrade the instance by completing the wizard.

Upgrade MS SQL 2005 to MS SQL 2008

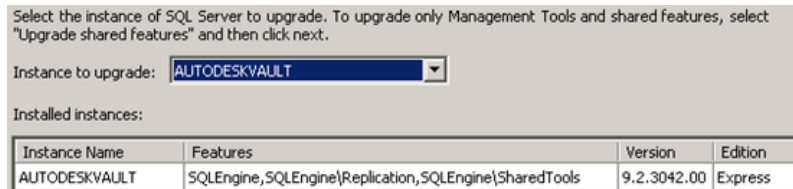
Follow these instructions to upgrade MS SQL 2005 to MS SQL 2008.

Upgrade from SQL 2005 Express to SQL 2008 Express

- 1 Download SQL 2008 Express from <http://www.microsoft.com>, or insert your SQL 2008 Express installation media. The SQL 2008 Express installer is located on the Vault installation media under <MEDIA>\x86\Support\Sql2008Express. It can be required to install Windows Installer 4.5 prior to SQL 2008 Express (KB942288).
- 2 Select the "Installation" option and begin the "Upgrade from SQL server 2000 or SQL Server 2005" Wizard.



- 3 Continue through the pre-installation process. Pre-request files and services are updated. Setup Support Rules are processed.
- 4 Select theAutodeskVault instance to upgrade, confirm instance settings.



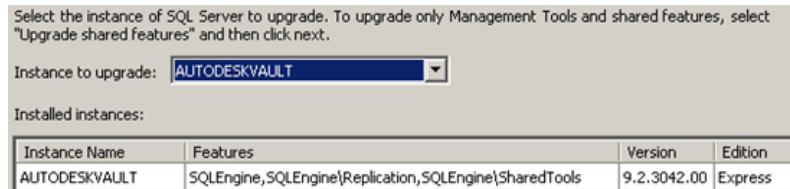
- 5 Continue through Disk Space requirements, Upgrade rules, and Upgrade Process. Setup will complete and upgrade the AutodeskVault SQL instance to SQL 2008 Express.
- 6 Verify that SQL 2008 SP1 is installed. If it is not, download and install it from <http://www.microsoft.com>.

Upgrade from SQL 2005 Express to Full SQL 2008

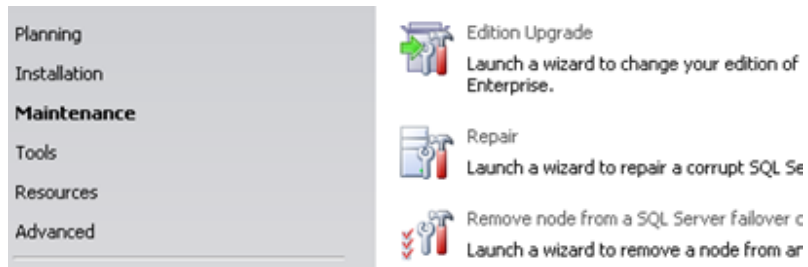
- 1 Download SQL 2008 Express from <http://www.microsoft.com>, or insert your SQL 2008 Express installation media. The SQL 2008 Express installer is located on the Vault 2011 installation media under <MEDIA>\x86\Support\Sql2008Express. Please note that you may be required to install Windows Installer 4.5 prior to SQL 2008 Express (KB942288).
- 2 Select the "Installation" option and begin the "Upgrade from SQL server 2000 or SQL Server 2005" Wizard.



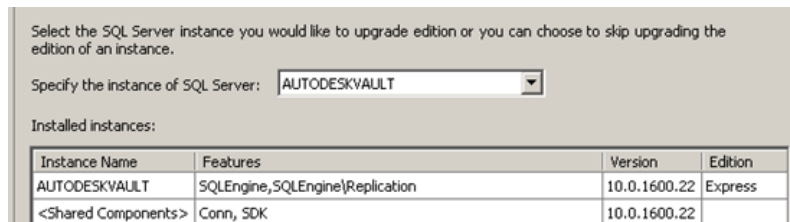
- 3 Continue through the pre-installation process. Pre-request files and services are updated. Setup Support Rules are processed.
- 4 Select the AutodeskVault instance to upgrade, confirm instance settings.



- Continue through Disk Space requirements, Upgrade rules, and Upgrade Process. Setup completes and upgrades the AutodeskVault SQL instance to SQL 2008 Express.
- Launch Setup.exe from the Full SQL 2008 installation media. Select the Maintenance option and being the Edition Upgrade wizard.



- Verify version and or product key for Full SQL 2008 and proceed to the Select Instance window and choose the AutodeskVault instance.



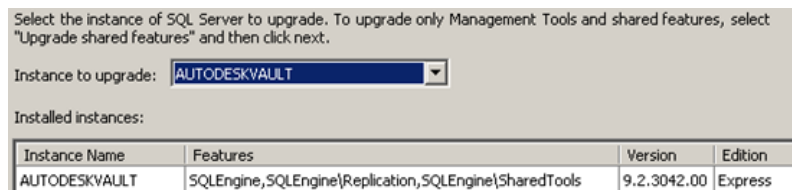
- Upgrade the Instance. Then, to install the SQL Management Studio, return to the "Installation" option, and be the "New SQL Server stand-alone installation, or add features to an existing installation" wizard.
- Verify that SQL 2008 SP1 is installed. If it is not, download and install it from <http://www.microsoft.com>.

Upgrade from Full SQL 2005 to Full SQL 2008

- 1 Select the Installation option and begin the Upgrade from SQL server 2000 or SQL Server 2005 Wizard.



- 2 Continue through the pre-installation process. Pre-request files and services are updated. Setup Support Rules are processed.
- 3 Select the AutodeskVault instance to upgrade, confirm instance settings.



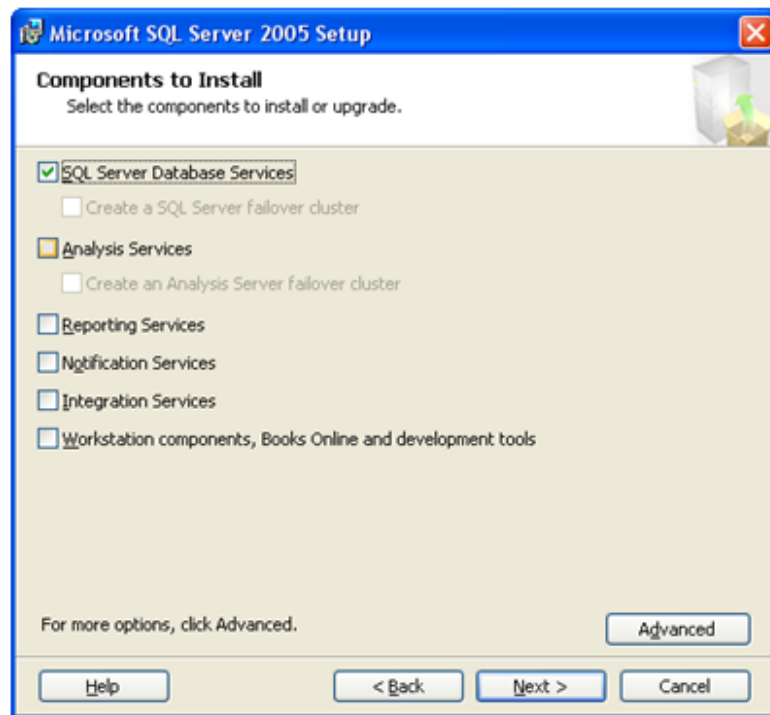
NOTE If you do not see the "Database Engine Services" listed as a component to be migrated, you are not following an accepted migration path. Acceptable migration paths are listed here <http://msdn.microsoft.com/en-us/library/ms143393.aspx>

- 4 Continue through Disk Space requirements, Upgrade rules, and Upgrade Process. Setup completes and upgrades the AutodeskVault SQL instance to Full SQL 2008.
- 5 Verify that SQL 2008 SP1 is installed. If it is not, download and install it from <http://www.microsoft.com>.

Upgrade MS SQL 2005 Express to Full MS SQL 2005

Follow these instructions to upgrade MS SQL 2005 Express to Full MS SQL 2005.

- 1 Insert your MS SQL 2005 installation disc into the drive and start the installation wizard. It installs the required pre-requisites first then begins the installation process.
- 2 Click Next. The wizard performs a system configuration check. Verify that all checks have a status of Success, and then click Next
- 3 In the Components to Install dialog, check the SQL Server Database Services and then click Next.



- 4 In the Instance Name dialog, select the Named instance radio button and enter AutodeskVault, or select Installed instances, select the AutodeskVault instance, and then click Next.

- 5 The Existing components dialog box lists the SQL Server Database Services that are going to upgrade. Check the box next to the SQL Server Database, and then click Next.
- 6 The Upgrade Logon Information dialog box prompts you for an account to use to perform the upgrade. It is required that your login an account has local Administrative privileges on the server. Select the Windows Authentication Mode, and then click Next.
- 7 In the Service Account dialog, select either a built-in System account or a domain user account to run the SQL Browser. Click Next.

NOTE If you were previously using a user account to run the SQL Server Service, select Use a domain user account, and fill in the required fields with that account.
- 8 The Error and Usage Report Settings dialog box displays optional settings that are not required by Autodesk.
- 9 On the Ready to Install dialog box, click Install to begin the upgrade process.
- 10 Download and install MS SQL 2005 SP3 from the Microsoft web site, if necessary.

NOTE For optimum performance, create a SQL Maintenance Plan after you perform this upgrade. Follow the steps in the Creating a SQL Maintenance Plan section.

Upgrade MS SQL 2005 Express SP2 or higher to full MS SQL Server 2005 SP3

To upgrade a SQL Express 2005 SP2 installation to a full version of SQL 2005, using a disc which does not include a service pack, SP2 or higher, you can use one of the following methods.

NOTE We recommend that before you perform either of these methods, you back up the Autodesk data management server console.

Method 1

- 1 Open a command prompt, and navigate to the directory where the full version of SQL setup is located.
- 2 Enter `SETUP.EXE SKUUPGRADE=1` (case sensitive).
- 3 Start the upgrade, and select the AutodeskVault instance.

- 4 After the upgrade is complete, apply SQL Service Pack 3.

Method 2

- 1 Create a full backup of your vault using the Autodesk data management server Console.

NOTE In later steps, you delete all of your vault databases. Before you proceed, validate that you can restore this backup on a test server. If your test restore fails, do not continue. Correct any problems you have with the backup before you continue these steps.

- 2 After the test restore is successful, open the Autodesk data management server Console and delete all vaults and libraries listed. Then, on the Tools menu, select Detach Master Vault.
- 3 Make sure all users are logged out of the vault.
- 4 Completely uninstall SQL 2005 Express, including the following applications, in this order:

- Microsoft SQL Server 2005

NOTE If you have more than one instance of SQL Express installed, uninstall only the AutodeskVault instance, and DO NOT uninstall any other part of SQL after this step is complete.

- MS SQL Server Native Client.
- MS SQL Server VSS Writer.
- MS SQL Server 2005 Backward Compatibility.
- MS SQL Server Setup Support Files.

- 5 Delete the SQL Express folders from Program Files (including data files). If your Vault databases are located on a different drive, delete the files in this location as well. **Do this ONLY if you are not using any other SQL Express instances.
- 6 Install the full version of SQL 2005 with an AUTODESKVAULT instance as in the Install MS SQL Server Prior to Installing Autodesk data management server section.
- 7 Install Microsoft SQL 2005 SP3.
- 8 Restore the backup that you created in step 1, using Autodesk data management server Console.

If you have difficulty removing the MS SQL Express instance, refer to Microsoft Knowledgebase article 909967 to help manually remove this instance.

NOTE For optimum performance, create a SQL Maintenance Plan after you perform this upgrade. Follow the steps in the Creating a SQL Maintenance Plan section.

Phase 3–Upgrade the Vault Server

After upgrading your SQL Server, you must upgrade your Vault Server. You can upgrade your Vault Server for Single Site or Multi-Site environments.

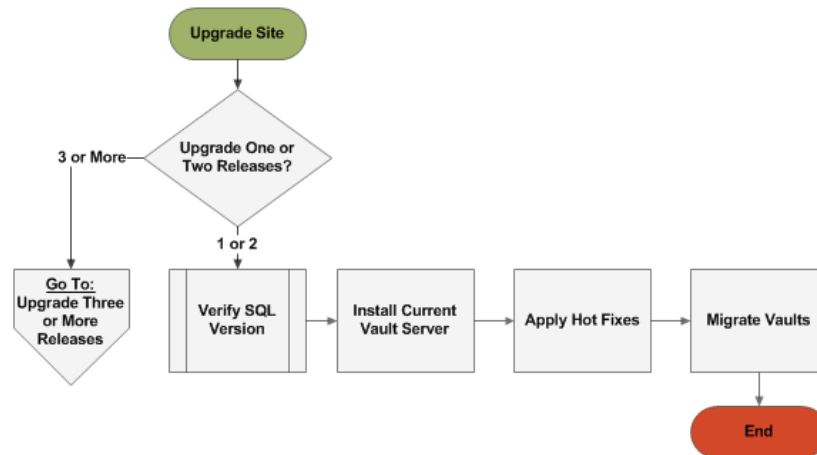


The best practice is to complete the Validate Backup stage and review the stage for Upgrade SQL prior to starting Upgrade Vault Server.

Refer to the topic for your environment for more information.

Single Site

Follow the instructions in this section for upgrading a Vault Server for a single site.



Upgrade One or Two Releases?

Upgrading one or two releases involves one installation of Vault server. Upgrading three or more releases requires intermediate installations of the Vault server.

For example, if upgrading from Vault Professional 2012 to Vault Professional 2016, use the '3 or More' migration path.

Verify SQL Version

Verify the existing version of SQL is compatible with the next Vault Release to be installed. If the existing SQL release requires an upgrade (See the preceding chapter in this paper Upgrade SQL) perform any necessary upgrades then return to this section.

Install Current Vault Server

Installing Vault server 2011 or a newer release supports automatic uninstall of Vault server 2010 or newer. Therefore, it is not necessary to uninstall Vault 2010 or a newer release.

During every installation of Vault server, enable the option to download and apply Service Packs.

At the end of the installation, you are prompted to start the Vault server application and migrate the Vaults. **Do not migrate the vaults at this time.**

Apply Hot Fixes

All hotfixes created after the final Service Pack should be manually installed at each site. Installing the hot fixes ensures that the latest updates are applied for proper migration.

Migrate Vaults

When Vault Server first launches, the administrator is prompted to migrate the vault and library databases. Users are not able to log into a vault until migration is complete. Do not migrate until all service packs and hot fixes have been applied.

If a service pack or hotfix is applied after migration, a build-to-build (b2b) migration is required. B2B migration is a command line option detailed in the section Migration Timeout and on the Autodesk Vault wiki.

Upgrade Three or More Releases

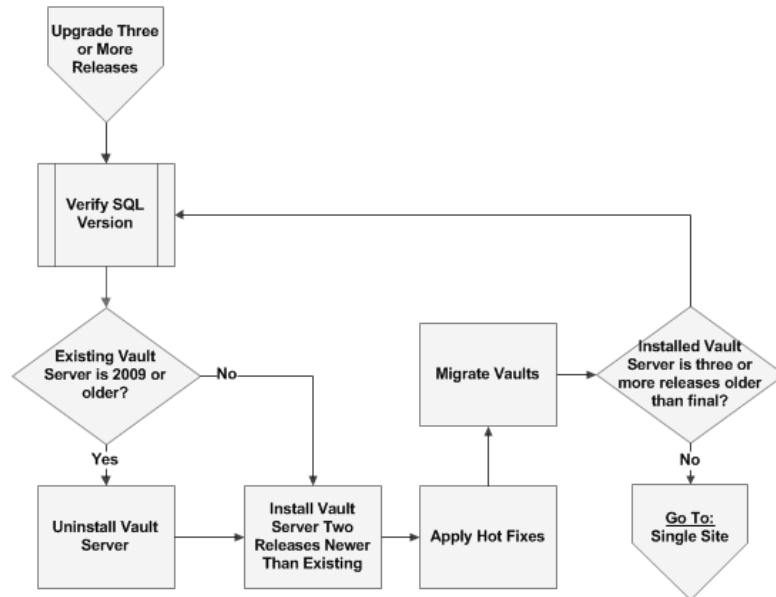
Follow the instructions in this section if your Vault Server is three or more releases older than the release to which you are upgrading.

Install Intermediate Releases

Each release of Autodesk Vault server supports migration from the previous two releases. When upgrading over three or more releases, it is necessary to migrate the SQL database through intermediate releases of Vault. This is done by installing every other release of the Vault server up to the final release.

For example: In order to migrate from 2012 to 2016, Vault 2014 must be installed as an intermediate step.

Release	Supports Migration From	
2016	2015	2014
2015	2014	2013
2014	2013	2012
2013	2012	2011
2012	2011	2010
2011	2010	2009
...	...-1	...-2



Verify SQL Version

Verify that the existing version of SQL is compatible with the next Vault release to be installed. If the existing SQL release requires an upgrade (See the preceding chapter in this paper Upgrade SQL) perform any necessary upgrades then return to this section.

Existing Vault Server is 2009 or Older?

Vault 2009 and older releases require a manual uninstall before installing a newer release. Vault 2010 and newer releases do not require you to uninstall before installing a newer release.

Uninstall Vault Server

This step only applies to Vault 2009 or older releases. Be sure to copy the `.../server/web/services/web.config` and `connectivity.vaultmanager.exe.config` files prior to uninstalling Vault server 2009 or an older release. Uninstall Vault server only; do not remove SQL or the Vault database.

Install Vault Server Two Releases Newer than Existing

During installation enable the option to download and apply Service Packs. If prompted, do not migrate at the end of the installation.

Upgrade from Release 2008/2009 to 2010/2011

Custom values in the following configuration files must be manually copied into the new configuration files. Be mindful of typos, a mistake in these files can block proper operation of the server. Do not replace the new files with the older files, and do not change any settings outside this list. Older configuration files may not contain all the fields listed in the newer configuration files. The field names in the older configuration files may also vary slightly.

NOTE It is best to use Notepad for editing and not Wordpad because Wordpad can corrupt the file.

Web.config file:

```
<httpRuntime maxRequestLength="_____"
  executionTimeout="_____" />

<identity impersonate="true"
  userName="_____\" password="_____\"
  />

<timeouts connection="____" defaultCommand="____"
  longCommand="____" />

<fragmentationCriteria minPageCount="____" minScanDensity="____"
  maxLogicalFrag="____" />

<remoteServer enabled="____" protocol="tcp"
  transferLocation="" />

<creationParameters vaultSize="____" vaultGrowth="____"
  librarySize="____" libraryGrowth="____" />

<connectivity.settings>

<add key="EventRetryInterval" value="____" />

<add key="IndexingSearchWakeupDelay" value="____" />

<add key="IndexingUpdateWakeupDelay" value="____" />

<add key="EcoNotificationProcessingDelay" value="____"
/>
```

```

<add key="DatabaseStatisticsUpdateTime" value="_____" />
<add key="FilestoreVacuumTime" value="_____" />
<add key="OptimizeIndexesTime" value="_____" />
<add key="FullcontentIndexing" value="_____" />
<add key="LockVacuumTime" value="_____" />
<add key="EffectivityUpdateTime" value="_____" />
<add key="CacheObjectExpiration" value="_____" />
<add key="PageSizeMaximum" value="_____" />
<add key="PageSizeDefault" value="_____" />
  <add key="PageSizeIndexing" value="_____" />
</connectivity.settings>
<connectivity.web>
<server port="_" sslRequired="_____" />
</connectivity.web>
<smtpserver name="_____" port="_">
<authenticate enabled="_____" username="" password="" />
</smtpserver>
<maxLength value="_____" />
<server value="_____" />

```

- 1 Copy the following values from connectivity.vaultmanager.exe.config into ADMSConsole.config:

```

<add key="WebServiceTimeout" value="_____" />
<webServer>
<add key="SSL" value="_" />
<add key="PORT" value="_____" />
</webServer>

```

Apply Hot Fixes

All hotfixes created after the final Service Pack should be manually installed at each site. Installing the hotfixes ensures that the latest updates are applied for proper migration.

Migrate Vaults and Libraries

Do not migrate the vaults until all service packs and hot fixes have been applied. When ready, start the Vault server application. The administrator is prompted to migrate the vault and library databases. Accept the offer and migrate all vaults.

The vaults must be migrated to the installed release before the next release of Vault can be installed. If a service pack or hotfix is applied after migration, a build-to-build (B2B) migration is required. B2B migration is a *command line* option detailed in the Migrate Vault Data After Installing a Hot Fix or Update section of the Autodesk Vault Online Help.

If Installed Vault Server is Still Three or More Releases Older than the Final Release

If the installed release is three or more releases older than the final release, repeat the steps in Upgrade Three or More Releases.

Installed Vault Server is One or Two Releases Older than Final Release

If the installed release is one or two releases older than the final release, then no more intermediate releases are required. Go to the steps in Single Site.

Multiple Sites

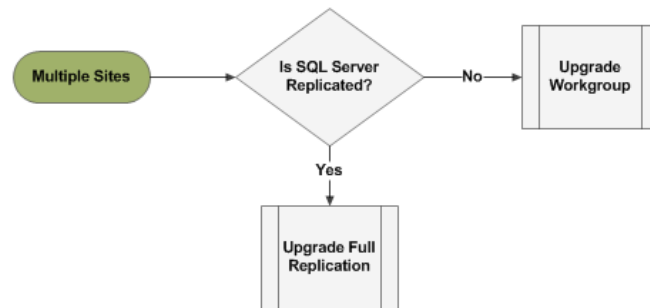
Autodesk Vault supports two styles of replicating data across multiple sites. First is a workgroup where there are multiple installations of the Vault server connecting to and sharing one SQL server. The second type is full replication where there are two or more replicated SQL servers. Further details are available on the Vault wiki.

Upgrade Three or More Vault Releases with Multi-Site or Replication

The concept of an intermediate installation is introduced in the section.

Upgrade Three or More Releases under Single Site within this document. The purpose of the intermediate installation is to ensure proper migration of the SQL database (this migration applies to the database not the content). In a

multi-site or replication environment, the first server upgraded migrates the SQL database. Therefore installation of intermediate Vault releases is only required for the first server upgraded. After the first site is migrated to the final release, all of the other sites can install the final release and skip intermediate releases of Vault server.



Upgrade Workgroup

In a workgroup any of the Vault servers may be the first to upgrade. The selected site will also migrate the SQL database. All other sites will be unable to access the SQL server until they are brought up to the same product, release, and service pack.

Best practice is to start with the site that has the fastest connection to the SQL server. When ready to perform the upgrade, follow the steps outlined in the section Single Site. Upgrade the selected server to the final release and service pack before moving onto other sites.

When the first site update is complete, install Vault server at the remaining sites. If upgrading from Vault server 2009 or older, uninstall the Vault server at all other sites. Then install the final release and service pack, skipping intermediate releases. The intermediate server releases are not required at the other workgroup sites.

Upgrade Connected Workgroups

Migration of a fully replicated environment must start with the Publisher workgroup. All subscriber workgroups must be online and available during migration of the publisher. As long as one Vault server and the SQL server are available from a workgroup, that workgroup is considered available. If a subscriber workgroup is offline and cannot be made available, postpone the migration.

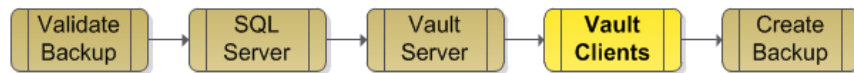
Validate the replication status of all workgroups and databases prior to migration. If replication issues exist, they must be resolved before proceeding. Details about replication status are available on the Vault wiki under Administrator's Tasks/Manage Replication.

Migrate one site from the publisher workgroup following the steps in the section Single Site. Installing the Vault server automatically migrates the SQL database. The SQL database migration is automatically replicated to all subscriber databases. After installation of the Vault server at the first site is complete, install the final Vault release, service packs, and hot fixes at all other sites across all workgroups.

If intermediate server releases are required they are only necessary on the first server. All other Vault servers in all workgroups should install the final Vault server release, service packs, and hot fixes, skipping intermediate releases.

Phase 4–Upgrade Vault Clients

After you upgrade the Vault Server, you must upgrade your Vault Clients.



Vault 2013 and Forward Compatibility

Vault 2013 introduced the ability for the ADMS server to support the previous release client integrations. This provides Enterprise and SMB operators who need to stagger the client and server side roll out the flexibility to do so. The company's ADMS server can now be migrated to 2013 and commissioned without any need to upgrade or otherwise patch the numerous client machines connecting to the current 2012 server.

Upgrade Vault Clients

The Autodesk Vault clients are available with the product installation media as well as on the Autodesk Vault media.

The Autodesk Vault add-in for Microsoft® Office is shipped with your software. It can be used with one or more of the following Microsoft products when installed and registered on your machine.

- Word® 2003/2007/2010
- Excel® 2003/2007/2010

■ PowerPoint® 2003/2007/2010

To install the Autodesk Vault clients, you must have either Microsoft Windows administrator or power user privileges.

Install the Clients for an Autodesk Design Application

Insert the installation media for the Autodesk design application and follow the instructions for the installation wizard.

Install the Clients for a non-Autodesk Design Application

Insert the installation media for the application and follow the instructions to install the software.

Install clients from the Autodesk Vault Media

- 1 Insert the Autodesk Vault media.
- 2 Double-click setup.exe.
- 3 Follow the instructions in the installation wizard.

Add-in Integration

If a design application is on the computer before the clients are installed, the corresponding add-in clients automatically integrate with the design applications. However, if an application is installed after the Vault client, action is required. Go to the Control Panel and modify the Vault client installation to add the missing add-in.

Phase 5–Create Backup

The best practice is to create a backup of the vault as soon as the upgrade is complete.



Perform a validation of the backup using the process described in the first stage of this document.

