

Content Center: Migrate libraries and update associated Inventor files

This Skill Builder guides you through migrating your Content Center libraries and updating the associated Inventor files. The migration of the Content Center components is done in two steps. The first step is to migrate the Autodesk Data Management Server (ADMS). The second step is to update the Content Center data to the new version of Inventor and refresh the legacy assemblies.

Perform the following steps to migrate and set up legacy user libraries:

- Use ADMS Console to create a backup.
- Uninstall the existing ADMS, and then install the new version of ADMS and Inventor.
- Migrate legacy Content Center libraries to the new version of ADMS.
- Configure Content Center libraries on the server.
- Configure Content Center libraries in the Inventor project.
- Update legacy user libraries by using Update Tool.
- Refresh Content Center parts in legacy assemblies.

Step 1: Use ADMS Console to create a backup

Back up all ADMS data before you upgrade ADMS. Run ADMS Console, and select Tools > Backup from the ADMS Console menu. The Backup tool creates a backup of all libraries and vaults.

Note: If the ADMS database is corrupted, use the backup file to restore ADMS data and configuration as they existed at the backup time. In ADMS Console, click Tools>Restore from the menu.

Step 2: Uninstall existing ADMS, and then install new version of ADMS and Inventor

1. Uninstall the old version of ADMS.
Note: Do not uninstall the SQL Server. The new ADMS version will detect and use it.
2. Install the new version of ADMS. The installation detects legacy user libraries. After the installation finishes, it reminds you to migrate your libraries.

Select Start the server console now and click OK to start the server console and migrate the existing database. An automated process migrates your vaults and libraries. You can select libraries to be available in the new Inventor version. If the process finished successfully, you can continue with step 5 of the library migration procedure. If you drop the automatic migration, you must migrate the database and configure the server manually.

Tip: To defer the automatic migration, select Run the server console at a later time, and then click OK. The first time you launch the server console, you are prompted to migrate the existing database.

3. Install Autodesk Inventor 2009. You can keep the old version of Autodesk Inventor on your computer and set up the Side-by-Side environment. See Appendix 1 for more information.

Step 3: Migrate legacy Content Center libraries to the new version of ADMS

If you used the automated process to migrate legacy user libraries, you can skip this step.

If legacy user libraries were found during the installation, but you canceled their automatic migration, you must migrate them manually. These libraries are visible in the Libraries folder in the ADMS Console, they are marked by an exclamation mark icon, and are not available for use.

1. Run ADMS Console.
2. Expand the root and the Libraries item in the ADMS Console browser.
3. Right-click the library to migrate, and select Migrate from the menu.
4. Click OK to migrate the library to the new server version. The library is inserted in the partition corresponding to the Inventor version that was used to create the library.

Notes:

- Legacy user libraries must be migrated to the new server to be available for use. Migrated libraries are changed to conform to the new version of ADMS.
- Migration of libraries is an irreversible process. Libraries can migrate to a newer version of library server only. Migrated libraries cannot be used with an older version of the library server. Create a backup before you migrate libraries. If needed, you can later restore the original libraries from the backup file.

Step 4: Configure Content Center libraries on the server

If you used the automated migration process to copy legacy user libraries to the appropriate partition, you can skip this step.

After a legacy user library is migrated (during the installation or manually), it is added in a partition on the server. The partition corresponds to the Inventor version where the library was created. Legacy libraries are added either in the Autodesk Inventor 2008 partition or Autodesk Inventor 11 partition. You must copy libraries into the Autodesk Inventor 2009 partition to use them with Autodesk Inventor 2009.

1. Run ADMS Console.
2. In the ADMS Console window, expand Libraries, and right-click a library to copy.
3. Choose Copy from the menu.
4. In the Copy Library dialog box, enter the library name, select Autodesk Inventor 2009 partition, and click OK. The library is copied into Autodesk Inventor 2009 partition.

Note: After you finish, all libraries you want to use with Autodesk Inventor 2009 must be available in the Autodesk Inventor 2009 partition.

Tips (Server Configuration):

- To add standard libraries, run the installation Setup, select the libraries to install, and install them.
- To move libraries between library servers, use the Export and Import ADMS commands.

To export a library from the source server:

1. Run ADMS Console.
2. In the browser panel, expand the server root and the Libraries folder.
3. Right-click a user library to export, and select Export from the menu.
4. Specify the location for the exported library.

Note: Export does not remove or change the original library.

To import the library to the destination server:

1. Run ADMS Console.
2. Expand the root in the ADMS Console browser.
3. Right-click the Libraries item, and select Import Library from the menu.
4. Locate the .mdf file and click OK to import it. The library is inserted in the partition that corresponds to the Inventor version that was used to create the library.

Step 5: Configure Content Center libraries in the Inventor project

Content Center libraries must be configured in the Inventor project to be available in Content Center.

1. Start Autodesk Inventor 2009. Click File > Projects.
2. In the Projects dialog box, click the Configure Content Center Libraries button.
3. Add all legacy user libraries you want to use. To add a library, click the Add Library button in the Configure Libraries dialog box. Select the library in the Add Library dialog box, and then click OK. The library is added to the Libraries list.
Note: An exclamation mark icon in front of a library name indicates that the library cannot be used in Content Center. You must update the library with the Update Tool.
4. Click OK in the Configure Libraries dialog box.
5. Click Save in the Projects dialog box to save the project.
6. If appropriate, change the storage folder for Content Center parts. See the Inventor Help for more details.

Tips:

- If you use an existing project as a template for a new project, the Content Center configuration is inherited.
- If you are a stand-alone user, define the appropriate library configuration for particular projects to keep the best Content Center performance. Remove all unused libraries from each project.
- If you are an administrator of a workgroup, create a project file with the appropriate library configuration, copy the project to a shared location, and ask designers to include the project into their local projects. Then designers can add new libraries to their local projects but cannot remove libraries configured in the shared project. (**Note:** Vault does not support included projects.)
- If a project is controlled by Vault or other data management system, it must be checked-out to modify the library configuration.

Step 6: Update legacy user libraries by using the Update Tool

A legacy user library cannot be used in Content Center until it is converted by the Update tool. The Update Tool migrates legacy families, and then updates families whose parent family was changed. During the update, edits available in the source parent family are propagated to the child family in the user library. The changes in the family properties or parameters are preserved, but the data that you did not edit are changed to correspond to the source family. If you changed the family template file, your template file is overwritten after the family update. Let the Update Tool create a backup of your template files and apply your templates to updated families.

1. In the Projects dialog box, click the Configure Content Center Libraries button.
2. Click the Update tool button.
The Update Tool dialog box is displayed. The legacy libraries to update are listed in the Following User Libraries are available for Update list.
3. Select the library to update. If more than one user library is out of date, you can select several libraries to be updated in the same process. Then click Next.
4. A library analysis is performed and results of the analysis are displayed. If any problems are found, you must solve them to continue. If no problems are found, the Backup options are displayed. Specify a folder to create a backup and click Next.
Note: Parent (source) families can be located in standard libraries or in user libraries. All standard libraries that include parent families must be available to run the Update Tool. If a user source library cannot be found, the Update Tool completes the migration, and then updates only families whose parents are available. Updating other families is postponed.
5. After the process ends, review the Update report.
Tip (Cross References between Libraries): If there is a cross reference, and you have a user library (UL1) that includes source families for families in user library UL2, and UL2 includes source families for families in user library UL1, you must attach both libraries and run the update tool step by step for UL1 and UL2.
6. Click the Save As button to save the Update Report. Select the destination folder and click Save.
7. Fix all sick families in the updated library (libraries). Sick families are marked with an icon in the Place from Content Center and Content Center Editor dialog boxes. They can be used in Content Center, but sick family members may cause unexpected problems.

Problems that may appear in the updated library:

Problem	Possible Cause	Solution	Step 7: Refresh Content Center parts in legacy assemblies
A family table contains empty cells in numeric columns.	A new column was added to the parent family table in the standard library. You copied that family in your legacy library and added a row to its table. Update Tool propagates the new column to the copied family, and a blank cell appears in the row added by you.	Open the family table and enter an appropriate value to the blank cell.	We recommend that you refresh standard components after you migrate an assembly into the new Inventor version. If the assembly is not refreshed, it may contain out-of-date standard parts. When you perform a Content Center operation related to an out-of-date standard part, the corresponding part file is “silently” refreshed. All occurrences of the out-of-date part are replaced by a new version of the part. Examples of operations that can cause a silent refresh are Change Size, Place from Content Center, and Open from Content Center.
A family does not map all required category parameters.	A required parameter was added to a category in the standard library. Your legacy library includes a family published in that category. The new required category parameter is not mapped to any column in the family table.	Open the Mapping tab of the Family Properties dialog box, and map the required parameter to a column in the family table.	
A family requires authoring.	A category in the standard library requires authoring. Your legacy library includes a family published in that category. The family template file does not contain the authoring information.	Instantiate a family member and run the authoring tool for the part file. Then replace the family template with the authored file and define parameter mapping for required category parameters.	

menu. An analysis of the assembly is performed. All out-of-date Content Center parts are found and displayed in the Standard Component Refresh dialog box.

Note: If no standard parts are out-of-date, the refreshing process is finished.

3. Review the Instance Status information and set Yes in the Update column to update the standard parts.
4. Click OK to refresh the assembly.

Note: If Content Center files are included in Vault (or in other data management system), the Refresh Standard Components tool must check out all out-of-date Content Center part files to replace them. Read-only parts cannot be refreshed and remain out-of date.

Appendix 1: Side-by-Side installation

To support Side-by-Side installation, the library server maintains Content Center libraries that were built for different Inventor versions. Libraries are saved in the corresponding partition on the server. Libraries in Autodesk Inventor 11 partition are used by Autodesk Inventor 11 with Client Update patch. Libraries in Autodesk Inventor 2008 partition are used by Autodesk Inventor 2008 with Client Update patch. Libraries in Autodesk Inventor 2009 partition are used by Autodesk Inventor 2009.

To set up the Side-by-Side environment, follow the previous steps to install the new version of ADMS and Inventor. Then continue with the following steps:

1. Copy user libraries to appropriate partitions on the server. Remember that each version of Autodesk Inventor can access only libraries included in the corresponding partition.
2. Install Client Update patch for Autodesk Inventor 11 and Autodesk Inventor 2008.
3. In Autodesk Inventor, edit or create projects. Configure Content Center libraries and set up the Content Center Files folders in particular projects.
Note: You must use separate Content Center Files folders for each version of Inventor. Sharing the Content Center Files folder by different versions of Inventor would cause unpredictable replacing of standard parts in assemblies.

Tip: See the *CC_for_Inventor_2009_side_by_side_install.pdf* document in the Setup folder of Autodesk Inventor for more information about Side-by-Side installation.

Appendix 2: Work in Vault or other data management environment

To refresh Content Center parts in assemblies:

- If Content Center files are saved in Vault, the Refresh Standard Components tool must check out all out-of-date Content Center part files to replace them.
- Refreshed Content Center files remain checked out when the refreshing process finishes. You must check the files in manually.
- If the refreshing process cannot change the read-only status to read/write automatically, standard parts are not refreshed and remain out-of date. This problem appears if read-only standard parts are not saved in Vault, or if Inventor does not recognize that standard parts are saved in Vault (a single-user Inventor project is active, or standard parts were added to Vault by different Vaulted project).
- Storage location for Content Center files:
- If you work in Vault (or in another data management system) environment, each member of the workgroup must use a local folder to store Content Center files. The local Content Center Files folder should be controlled by the data management system.
- Do not change the location of the Content Center Files folder while a project is active.