

Vault Upgrade Checklist

This is a generalized check list to assist with upgrades for Autodesk Vault. You are encouraged to modify this each time you go through an upgrade process to ensure that this remains current and relevant to your own environment.

Vault Upgrade Task List:

- Version and Environment related
 - What version am I on _____
 - What version do I want to move to _____
 - Am I planning on updating my client workstations during the Vault Upgrade, or after
 - During?
 - After?
 - Is your current version within 2 versions back of the version you are upgrading to? i.e. 2016 - 2 = 2014 minimum (inclusive of 2015 and 2016)
 - What version of Windows _____
 - What version of SQL Server _____
 - Versions of Windows and SQL Server are within the compatibility range for your Vault version? (Lookup Autodesk Help article on the Version of Vault you are looking to move to)
 - Connected Workgroup/Database Replication _____
 - File Replication (if yes above, typically yes as well) _____
 - ADMS Server(s) _____
 - AVFS Server(s) _____
 - SQL Server Servers _____
 - Estimated Workstation Count _____
 - Products (circle) Inventor | AutoCAD | Office | Other CAD
- Preparation Tasks
 - Copy Software to ADMS and AVFS Servers (listed above)
 - Extract software files
 - Confirm backups (database and filestore)
 - Backup web.config
 - Decide on rollback plan, including timing
 - Test your plan and repeat as necessary
- Upgrade
 - Stop IIS
 - Begin database backup and filestore backup (via Vault or third party)
 - While backup is completing, begin software installation on all applicable servers (ADMS and AVFS).
 - DO NOT Launch ADMS Console when complete or begin migration
 - When backup completes, begin migration on ADMS server attached to Publisher, or on main ADMS server if not doing workgroup replication
 - Migrate system databases
 - Login to the ADMS Console
 - If dealing with a single Vault, choose to migrate and include content center libraries

- If dealing with several Vaults, choose to not migrate the Vaults and content center libraries
 - You will manually migrate each Vault from the ADMS console to provide clear picture of your progression
 - Migrate content center libraries as well
- If using Workgroup replication (database replication), monitor process of this via Vault and SQL Server Replication Monitors
 - This will likely take quite a bit of time
- Once replication is complete, do quick testing to ensure GET with Checkout works against every server
- Handoff to User for acceptance testing
- If upgrading client applications, ensure that the custom content centers are copied to the new versions partition. For non custom content, download the appropriate version from Autodesk and put it into place