

Autodesk Inventor 2011

Planning Your Installation

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Installation Planning Guide

1

Autodesk® Inventor® provides a comprehensive set of design tools for the development, validation, and documentation of manufactured products. It is used in a wide range of industries. Installations of Autodesk Inventor 2011 range from single computers for independent contractors to large multi-site installations supporting hundreds of engineers and designers.

This guide reviews the many different usage scenarios, which can be installed in different configurations.

Purpose

Use this guide to help you make the appropriate decisions concerning the installation and deployment of Autodesk Inventor 2011 for your specific product design environment. Whether this installation is your first of Autodesk Inventor or an upgrade from a previous version, this planning information ensures an expeditious and successful deployment.

This guide is meant as an overview. For further information about each topic see “Other Sources of Information” at the end of each section.

If after reading this guide you need additional guidance to plan your installation, we recommend that you contact your reseller.

Other Sources of Information

Read the *Fundamentals for the Inventor CAD Manager* resource guide for information about best practices, installation, migration, Application Options settings, configuring styles, and so on. This guide provides links to existing content in the Help, white papers, installation Help, and many other sources.

Locations:

- On the product media, installation wizard, click Read the Documentation. Under Autodesk Inventor 2011, click *Fundamentals for the Inventor CAD Manager*.
- In the product Help, Contents tab, click *CAD Manager Fundamentals*.

License Types and Usage

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This chapter explains some of the installation options for both Stand-alone and Network licenses for your Autodesk® Inventor® 2011 product. It also guides you to other sources of detailed information.

NOTE Requirements and recommendations are covered in [Recommended System Requirements](#) on page 17.

Stand-alone License

A stand-alone license is typically for home use, and for independent contractors and small teams with limited network access.

You can install a stand-alone license directly from the product media, or create a deployment image for installation. You can register at the time of installation.

Network License

NOTE Autodesk Inventor LT 2011 does not support network license management. This section applies only to the AutoCAD® Inventor® suites and Autodesk Inventor.

Members of a team who are connected to a corporate network typically use a network license. You can use a single-license server or multiple servers to provide additional redundancy.

When you have a Network License:

- You can do a multi-seat installation from the product media for stand-alone licenses or network licenses, or any mix.

- Team members are not required to register. The Network License Manager manages requests for running networked applications. For example, say that you purchased a network license for 25 seats, and the product is installed on 30 seats within the network. The Network License Manager is installed, activated, configured, and started on an appropriate server. Then up to 25 of the 30 installed systems can log on at any given time. When someone closes an application, it becomes available to the next system that logs on.
- You can also install a network license for Autodesk Inventor or Mechanical product directly from the media.
- The registration information is pre-configured during creation of the deployment image and is duplicated for installations on all workstations.

Multi-seat Stand-alone Installation

You can install a multi-seat stand-alone configuration directly from the media, or create a deployment image for installation with a network license.

When you set up a multi-seat stand-alone installation:

- To install on workstations requires that you use the shortcuts provided in the deployment image created by the Deployment wizard. The registration information is pre-configured during creation of the deployment image and is duplicated for installations on all workstations.
- The products can be installed on only the maximum number of systems the license allows, except for 30-day trial versions.
- All deployment images require the same serial number for activation, and they are all activated the first time a product is launched.

Network License Server Models

The network license server is the location where the Network License Manager is installed. You can use a single-license server or multiple servers to provide additional redundancy:

Single The Network License Manager is installed on a single server. License management and activity is restricted to this server. A single license file represents the total number of licenses available on the server.

Distributed Licenses are distributed across more than one server. A unique license file is required for each server. To create a distributed license server, you run the Network License Manager on each server in a distributed pool. Each server serves a subset of the total license pool.

Redundant The Network License Manager is installed on each of three servers to authenticate a single license file. One server acts as the master. If the master server fails, the other two provide backup. Licenses are monitored and issued as long as at least two servers are functional.

Requirements for Network License Servers

Operating System:

- Windows server® 2003
- Windows® XP Professional Service Pack 1, 2, or 3
- Windows server® Edition
- Windows® 2000 Service Pack 4
- Windows® Vista™ Service Pack 1

Computer:

- Intel® Pentium® III or equivalent with at least 450-MHz processor and Network Interface Card TCP/IP

NOTE It is possible to run a Network License Server on a workstation. However, if the workstation is sometimes turned off, we recommend that you run the Network License Server on a dedicated server to avoid possible work stoppages.

Cascading Licenses

Cascading licenses is a feature of the Autodesk® Network License Manager. Its purpose is to assign appropriate licenses when different Autodesk products are installed on the same network. When a product starts, it requests a matching license from the license server. If the matching licenses are all in use at the time of the request, then the cascading license feature looks for a higher value license. The license request is then satisfied, and there is no work stoppage.

If a specific team member needs access to only one specific application (for example, Autodesk Inventor), then you install only that application on that member computer. The installation participates in the complete license pool.

Instruct teams to close Inventor when they finish using it so that the license is available for someone else. Licenses are returned to the license pool when the application closes.

For more information about cascading licenses:

- Search the Autodesk® Knowledge Base with the keywords “cascading licenses”.
- On the install media, on the first page of the Installation Wizard, click Read the Documentation, and refer to the License Guide.

License Multiple Autodesk Products

To manage license files for more than one Autodesk product, you combine them. To combine license files for Autodesk products, you add lines from the new license file to the existing license file.

See [Other Sources of Information](#) on page 7.

Configure Autodesk and Vendor Products

You can configure the FlexNET® license manager to provide network licenses for Autodesk and other vendor products from one server. It is required that you have only one installation of FlexNET on a given server. We recommend that you create a separate service for each vendor.

Borrow Licenses

If you take work to another location, you can transfer, or borrow a license. A borrowed license means you can use an Autodesk product on more than one computer without purchasing a separate license for each computer. To borrow a stand-alone license, use the License Transfer Utility to transfer the license from a particular system to another.

If you Autodesk Inventor software with a network-license, you can borrow a license from a license server for a specified time of up to 180 days. You can use the program while your computer is not connected to the network. You

can give the license back to the server any time before the end of the specified borrowing time. You must be connected to your Network to borrow the license from Inventor. To borrow a license on a network, on the Start menu, click Programs ► Autodesk ► Autodesk Inventor [version] ► License Transfer Utility.

License Timeout Feature

With license timeout, you can set a timeout period on your license server. Then a license returns to the license server when:

- A connection with the workstation is lost.
- A license is checked out but the Autodesk product is idle on a workstation for longer than the timeout period you define.

See [Other Sources of Information](#) on page 7.

Transfer Stand-alone Licenses

The Portable License Utility transfers a product license from one computer to another. It ensures that the product works only on the computer that currently contains the license. There is a grace period of 24 hours for an emergency time period with a portable license.

Other Sources of Information

For more information about the license timeout feature and how to set the timeout parameters, on your product media, documentation page, see Network and Licensing ► *Network Licensing Guide* ► Set Up License Timeout.

For more information about requirements for network server licenses, see the *Network Licensing Guide* and the *Autodesk Vault 2011 Implementation Guide* on your product media.

Use the Search function on the Autodesk Web page to search for more information about combining licenses.

- 1 On the Web, Go to <http://www.autodesk.com> ► Industries ► Manufacturing.
- 2 In the Search box, enter TS65928, and then click >. Topics about combining licenses are listed.

Click a topic title to view the content.

Use the same procedure to search for other topics, including the following:

Enter in Search	For information about
------------------------	------------------------------

TS67745	Configure Autodesk and vendor products.
---------	---

TS74980	Additional license configurations.
---------	------------------------------------

cascading licenses	Additional information about cascading licenses.
--------------------	--

Autodesk Knowledge Base

Use the Autodesk Inventor knowledge base to search for more information about borrowing licenses:

- 1 On the Web, go to <http://www.autodesk.com> ► Products ► Autodesk Inventor ► Service and Support.
- 2 Click Knowledge Base Search.
- 3 In the Search box, enter *borrow licenses*, and then click Search.
Topics about borrowing licenses are listed.
Click a topic title to view the content.

Use the same procedure to search the Knowledge Base for other topics, including the following:

Enter in Search	For information about
------------------------	------------------------------

TS65935	FLEXlm feature codes for Autodesk applications.
---------	---

cascading license	Additional information about cascading licenses.
-------------------	--

Content Center

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The Autodesk® Inventor® Content Center provides access to an extensive library of parts, such as fasteners, steel shapes, and fittings. You can use these components in designs. This chapter describes the configuration requirements for Content Center, and includes a guide to more detailed information about it.

Content Center Configurations

The data stored in Content Center is organized and published with functional intelligence. For example, it includes additional parameters and properties utilized by Design Accelerator and Autodesk® Inventor® Professional tools to guide, create, and validate design. Frame Generator in Inventor 2009, 2010, and 2011 also uses Content Center libraries. You can use the Content Center Favorites tool located in the browser bar to search, edit, and organize content in groups for quick access.

During the Inventor installation, in the Content Center Access Options, you determine which solution to install:

- **Inventor Desktop Content** for standalone users. Desktop Content and Desktop content libraries are installed by default by the product installer.
- **Autodesk Vault server** for multiple users who wish to share content, or larger installations. Install separately the Vault server and Content Center libraries for Vault server.

You deploy the Vault server with Content Center as a centralized content repository. You can customize the content data, such as part number and descriptions, based on company preferences to ensure designers work with the same approved data.

To set up Content Center, use a centralized server for all users if you customize the content data for your site or modify it over time. Although it increases network traffic, storage costs decrease.

Install Versions 2011 and 2010 Side-by-side

You can run Autodesk Inventor 2011 and Autodesk Inventor 2010 software on the same desktop workstation, with each accessing the appropriate Content Center data. A single data management server provides and supports versions 2011 and 2010 content. The server can be installed on the same workstation as Autodesk Inventor versions 2011 and 2010 software.

Important points about side-by-side installation

- Versions 2010 and 2011 both access the same server – Autodesk® Vault 2011 server.
- To use Autodesk Inventor 2010 Content Center with the Autodesk Vault 2011 server, install the Inventor Upgrade for Autodesk Vault server. This upgrade is available as a download only. It also upgrades the Vault client.
- Autodesk Vault 2011 server supports content for different Inventor versions.

For more information about this installation process, see the white paper *Content Center for Inventor 2011 Side-by-side Installation* on the product media.

Optimize Hard Disc Or Drive Space

The Content Center database is extensive. It covers 18 international standards with over 750,000 components. The hard disc or drive space requirement is:

- Desktop Content solution for a single user: up to 7 GB.
- Vault server solution for workgroups: up to 1.3 GB.

You can install only the libraries you need initially. At any later time, you can add more libraries through the installer.

Set Up a Local Content Center

If you are a single user or an independent member of a design workgroup, and you do not plan to share content libraries, install Desktop Content. Select

the Content Center libraries to install on the local machine. This sets up Content Center on the same machine with Autodesk Inventor.

Data Access for Local Content Installation

The Autodesk Vault 2011 server supports the Web server Microsoft® Internet Information Services (IIS) for all multi-user installations.

For more details, and procedures for installing this server, refer to the *Autodesk Vault 2011 Implementation Guide* on your product media.

Set Up a Shared Content Server

We recommend that workgroups share a common Content Center located on a networked server. For example, \\Workgroupserver\Engineering\Content_Center_Files. A common Content Center facilitates resolving links to components from Content Center when different workgroup members load assemblies.

Workgroup members can also install Desktop Content libraries on their local machines. Then they can switch between Desktop Content and Autodesk Vault Server in Application Options ► Content Center ► Access Options.

Requirements for Shared Servers

- Approximately 1.3 GB of hard drive space for installation.
- Temp space of an additional three times the requirement for installation or maintenance operations on the database.

Autodesk Vault Server

The Autodesk Vault server is used to manage Content Center file and version data. It is required that you install the Vault server on the same computer with the Content Center libraries you plan to access.

The requirements for installation of the Vault server software are in addition to the system requirements for individual applications.

Other Sources of Information

See the *Autodesk Vault 2011 Implementation Guide* on the documentation page on your product media for more information about:

- System requirements, supported operating systems, and supported databases for Autodesk Vault server
- Installing and upgrading the Vault server
- Additional hardware specifications and system requirements
- Requirements for SQL Server support

For more information about installing the Content Center, see:

- *Autodesk Inventor 2011 Content Center Standalone User Guide* on the product media.
- *Autodesk Inventor 2011 Content Center Installation Guide* on the product media.

Autodesk Vault Products

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The Autodesk data management tools include Autodesk® Vault 2011 and several other components. There are several configurations to consider in your plan for installation, depending upon your particular needs.

Implementation Guide for 2011

The *Autodesk Vault 2011 Implementation Guide* is located on the documentation page on your product media in PDF format. We recommend that you read this guide to gain an understanding of the data management tools and components before you begin to install them. You also learn to tune Vault for performance, and to run diagnostic tools to troubleshoot.

If you are a first-time user, the *Implementation Guide* provides essential information about:

- Backing up data in a Vault
- Vault architecture and components
- Installation, operating system, hardware, and other requirements
- Configurations for single and multiple users, multiple sites, and remote SQL
- Pre-installation checks

Before you upgrade from a previous version, review the *Implementation Guide*. It provides checklists of some of the major areas to consider before you move to a new release:

- Hardware and software requirements
- Business requirements

- Testing
- Migration

Other Sources of Information

For more information, see the Autodesk® Knowledge Base.

- 1 On the Web, go to <http://www.autodesk.com/inventor> ➤ Services & Support.
- 2 Click Knowledge Base.
- 3 In the Search box, enter a topic, and then click >.
Click a topic title to view the content.

Refer to the ongoing Autodesk discussion group at <http://www.autodesk.com/inventor> ➤ Products ➤ Services & Support ➤ Discussion Groups ➤ Autodesk Vault.

Installation Process

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This chapter helps you familiarize yourself with the installation process before you begin to install Autodesk®Inventor® products. It describes:

- Installation prerequisites
- System requirements
- The interface of the installation wizard

It provides information to help you configure your particular installation.

When the installation is complete, register and activate your products. For more information about registration and activation, see [License Types and Usage](#) on page 3.

Installation Interface

You can install products, create a deployment of a single or multiple Inventor products, and install tools and utilities through a single dialog box.

Each page in the Installation wizard contains a task section and an information section. To aid in the decisions required during installation, the information section contains links to information that is pertinent to the contents of the task section. As you proceed from page to page in the wizard, the list in the information section changes according to the contents of the task section.

After you select your products, a page with a summary of your selections is provided along with explanations of what the selections mean. You can back up and change the selections.

There are two links at the bottom of every page of the installation wizard:

- **Documentation:** Installation guides, network guide, licensing guide, and resource guide for the Inventor CAD manager, in PDF format.

- **Support:** Links to the Autodesk® support pages on the Web.

Prerequisites

Before you begin to install the software, we recommended that you review and meet the prerequisites:

- **Administrative privileges.** Obtain administrative privileges on each workstation where you plan to install the products. If you are unsure of your permission level, see your system administrator for more information.
- **Distribution plan.** For network installations, create a distribution plan for installing the products on clients once they are installed on the primary system.
- **Other applications.** Close all other applications, and temporarily disable virus checking utilities. The installation process could stop if some applications, such as Microsoft® Outlook® or virus-checking programs, are running.
- **Product license.** Understand the product licenses you ordered. See [License Types and Usage](#) on page 3.

Autodesk Inventor 2011 Application

Inventor 2011 is available on product media or, in some situations, electronic download.

Application	Supported Operating Systems	
	32-bit	64-bit
Autodesk Inventor 2011 32-bit	X	
Autodesk Inventor 2011 64-bit		X
AutoCAD® Mechanical 2011 32-bit	X	
AutoCAD Mechanical 2011 64-bit		X
Autodesk® Vault Explorer 2011 32-bit	X	X

Language requirements

- Autodesk Inventor and AutoCAD Mechanical design applications and Autodesk Vault products must all be the same language on a given computer.
- You can run English versions of these applications on operating systems of any language.
- While you create a deployment image, you can select multiple languages.

Recommended System Requirements

Before you begin installing, check to see that your system meets the recommended hardware and software requirements. Also, ensure that you have the system settings required to install and run Autodesk Inventor 2011.

Whether your Windows operating system is the 32-bit or the 64-bit version, the version is automatically detected during installation. The appropriate version of is installed. A 64-bit version of cannot be installed on a 32-bit system and vice-versa.

For Windows Users: See the following table for hardware and software requirements.

Recommended	For part and assembly design (less than 1,000 parts)	For large assembly design (more than 1,000 parts)
Microsoft Windows® Operating Systems	Windows® 7 (32-bit or 64-bit); Home Premium, Professional, Ultimate/Enterprise Windows® Vista™ (SP2) (32-bit or 64-bit): Home Basic, Home Premium, Business, Enterprise, Ultimate Windows® XP: Professional (SP3) XP Professional x64 Edition (SP2)	Windows® 7 64-bit Windows® Vista™ 64-bit (SP2) Windows® XP Professional x64 Edition (SP2)
Processor	Intel® Pentium® 4 - 2 GHz or faster, Intel® Xeon™, Intel® Core™, AMD® Athlon™ 64, AMD® Opteron™ or later	AMD64 or Intel® 64 processor
RAM	2 or more GB	6 or more GB

Graphics Card

Microsoft Direct3D 10, Direct3D 9
capable

CAD workstation-capable

Other Requirements:

- 16 GB free disk space to accommodate the installation files and temporary files created during the installation.
- DVD-ROM drive
- Microsoft Mouse compliant pointing device
- 1280 x 1024 or higher screen resolution
- Internet connection for Web downloads and Subscription Aware access
- Adobe Flash Player 10. Note: The multimedia learning components of the Inventor Help system, such as the Ribbon Introduction, Command Locator, and Show Me animations require Adobe Flash Player 10 be installed. If it is not already installed, you can download it from <http://www.adobe.com/products/flashplayer/>
- Microsoft Internet Explorer 6.x through 8
- Microsoft Excel 2003 through 2007 for iComponents, thread customization, and spreadsheet-driven designs

Notes:

- Autodesk Inventor 2011 and AutoCAD Mechanical 2011 applications are each provided both as 32-bit applications and as 64-bit applications for installation and use on the corresponding operating system only. Autodesk Vault Explorer 2011 is a 32-bit application for installation and use on either a 32-bit or 64-bit operating system.
- Autodesk Inventor 2011/AutoCAD Mechanical design applications and Autodesk Vault must all be the same language on a given computer. English versions of these applications run on any language operating system. Other language versions of these applications run on operating systems of that same language.
- Autodesk Inventor 2011 has been optimized to take advantage of the SSE2 extended instruction sets supported on Pentium 4, AMD Athlon 64 and AMD Opteron processors. Autodesk Inventor will not install on computers that do not support SSE2. Several utilities are available on the internet that report CPUID including supported instructions sets.

- Autodesk recommends settings which allow Microsoft Windows to manage virtual memory, as needed. There should always be at least twice as much free hard disk space as system memory (RAM).
- Please refer to the Autodesk published graphics card information at:
Autodesk Inventor Hardware Web Site
- Autodesk Inventor 2011 is available only on DVD media (or electronic download in some situations). CD media is no longer available. DVD-ROM drive is not required if installing using electronic download.,

NOTE The preceding requirements are recommended for effective use of Autodesk Inventor 2011 software. For further details, please refer to the Readme document installed with Autodesk Inventor 2011.

For Macintosh Users: See the following table for hardware and software requirements.

Boot Camp

You can install Autodesk® Inventor® Professional software on a Mac® computer on a Windows partition. The system must use Boot Camp® to manage a dual OS configuration and meet the minimum system requirements:

- Apple OS X 10.5x
- Boot Camp V 2.0 or higher
- Intel-based Mac (64-bit Windows Vista requires an Intel Core® 2 duo or Xeon® processor)
- Minimum 3 GB RAM (Recommend 4 GB for 32-bit Windows OS, 8 GB or more for 64-bit Windows OS)
- Minimum 20 GB disk space for Apple OS partition, minimum 20 GB for Windows OS partition

Mac Virtualization on Parallels Desktop

Autodesk Inventor Professional can be used on the Mac via Parallels Desktop for Mac without having to boot directly into the Windows OS so it is easy to switch between platforms. The system must meet the following requirements:

- Mac os X 10.5x
- Parallels Desktop 4.0 (4.0.3844 or higher) or Desktop 5.0

- Intel based Mac (64-bit Windows Vista requires an Intel Core 2 duo or Xeon processor)
- Minimum 4 GB RAM (6 GB system memory for 32-bit Windows OS, 8 GB or more for 64-bit Windows OS recommended)
- Minimum 40 GB available disk space (100 GB recommended)

For more details, please read the *Inventor for Mac FAQ* [Inventor for Mac FAQ](#).
To find out if a service pack is available, visit the *Autodesk Product Support page*

Define Your Installation Method

Your license dictates which installation you use: Network or Stand-alone.

Network Installation

The selection of Network leads you down the path for network and multi-seat stand-alone installation. It requires that you specify a license server model:

- Single license server
- Distributed license server
- Redundant license server

You can access design data locally or from a central server drive. The process is to modify the design data content to meet your needs, and then serve it to Standalone/MSSA/Network networked machines.

Stand-alone license

The selection of Stand-alone leads you down the path for an installation that runs an Autodesk product on a single workstation.

For more information about installation methods, see [License Types and Usage](#) on page 3.

Install Network Licenses

With a network license, the program is installed on workstations with the required files and registry entries. A defined location of the Network License Manager provides access to the licenses.

Uninstall any previous versions of the Deployment Wizard before you use the AutoCAD® 2011 Deployment Wizard. You cannot use an older version of the Deployment Wizard to create deployments of currently released programs. You cannot use the AutoCAD 2011 Deployment Wizard to create deployments for previous versions of the product.

Installing Multi-seat Stand-alone Licenses

The multi-seat stand-alone license configuration is available with a network license. When prompted in the Installation wizard, you choose the option Network, and then use the deployment shortcut to install the products to all the other systems.

Install Stand-alone Licenses

Stand-alone products require that you install the program individually on each workstation.

You can use your Autodesk product for up to 30 days before you are required to activate it. You can also activate your license at any time before the expiration date. After the expiration date, you cannot run your Autodesk product until you register and activate the product.

Moving Stand-alone Licenses

You can use the Portable License Utility to move a single Autodesk product stand-alone license to more than one computer without purchasing a separate license.

Manage Design Data

The Design Data folder provides a way for administrators to manage content. Many of the design-specific files, such as the styles, thread, and so on, are installed here.

The location of the Design Data folder is by default:

- For Windows XP, *Program Files/Autodesk /Inventor [version]/Design Data*
- For Windows Vista, *Users/Public/Documents/Autodesk-Inventor [version]/Design Data*

You can relocate either Design Data folder to a network location so that all designers can automatically get file edits made in this location. You can define different network locations on either a per-project basis or application wide.

NOTE The Design data folder you point to must contain a copy of all the files in the originally installed location. The Autodesk Inventor 2011 software checks to verify that all files are present upon a change in the location.

Autodesk Inventor 2011 allows an incomplete Design Data folder for legacy and Pack and Go projects. Autodesk Inventor 2011 locates the missing files in the default legacy install location, or provides a prompt to browse for them in some circumstances.

Following a network deployment, alert the users that:

- This data is shared on the network.
- Edits to local copies of the shared data affect the local behavior only if the local installation points to the local copy of the data.

To change the location of the Design Data folder application wide

Edit the “Design Data (Styles, and so on)” option in the Application Options dialog box, Files tab.

- 1 Tools ► Application Options, and then click the Files tab.
- 2 In the Design Data (Styles, and so on) text box, enter the UNC path to the network location. Alternatively, click the browse button to locate and specify the path.
- 3 Click OK.

To change the location of the Design Data folder for a project

Edit the “Design Data (Styles, and so on)” option in the Projects dialog box.

- 1 File ► Projects.
- 2 Select the Project you want to edit.
- 3 Expand the *Folder Options* folder. Right-click Design Data (Styles, and so on) and select Edit.
- 4 In the text box enter the UNC path to the network location, or click the browse button to locate and specify the path.
- 5 Click Save.

To revert back to the default content of the Design Data folder

- 1 In the Design Data folder, unzip the file called *DesignData.exe*.
- 2 Overwrite the existing *.xml* files.

Other Sources of Information

For more information about system requirements, on the Web go to
<http://usa.autodesk.com/adsk/servlet/pc/index?siteID=123112&id=13727144>.

Upgrades

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Before you start your upgrade to Autodesk® Inventor® 2011, take the time to understand:

- The importance of backing up your data
- Migrating data
- Custom settings, such as Inventor versus AutoCAD
- UI configuration options
- Content Center migration versus side-by-side

Upgrade from Previous Versions

Upgrading is the path you must take to obtain access to the new features and improvements incorporated in the new release. An upgrade is the complete set of steps required to move your engineering operations to the new release. It is not just the process of installing the software. Like any other process that involves change, it presents challenges and requires careful planning to minimize the impact on your operations.

There are three components to the upgrade process:

- Backing up and migrating data
- Installing the new software
- User training

Back Up Your Data

It is critical that you make a backup copy of your data before you start the migration process. If you encounter a problem during the migration process, a backup copy guarantees that you can recover your data.

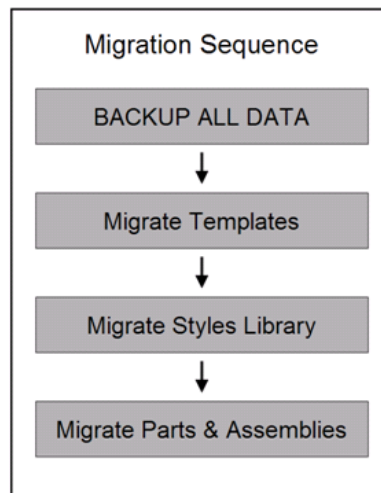
For detailed information, see “Backing Up Vault Data” in the *Autodesk Vault 2011 Implementation Guide* on your product media.

Migrate Your Data

Migration is the process of converting your existing data to the formats used by Autodesk Inventor 2011. We modify the internal format of Autodesk Inventor files, sometimes referred to as the schema, to support the new features.

Autodesk Inventor 2011 and later incorporates changes to the File Open command, which reduces the need to migrate data in some circumstances. Unlike previous versions, the Open command does not automatically migrate files from earlier versions, reducing the time required to open these files. The migration is delayed until you change or save the file.

While this feature enables faster viewing, it is still advisable to migrate projects that are still in active development, and therefore changing. The 3D models that you create with Autodesk Inventor consist of a hierarchy of files. It is important that you start the migration with the files that are used by other files. We recommend that you migrate files in the sequence shown in the following illustration.



You can control the sequence manually, but it is easier to use the Migrate Files utility built into the Inventor Task Scheduler.

Migration Plan

If you have a large volume of active engineering data, consider dividing the process up into smaller phases. Your reseller can help you select the most appropriate strategy for your specific situation.

Migrate Content Center

The Content Center contains the data required to insert standard parts into your designs. Migrate this information before you try to use it with the new version of Autodesk Inventor.

The Content Center in Autodesk Inventor uses the Autodesk® Vault server as the data storage technology for all standard content. It is the common data storage mechanism for Autodesk® Vault products and other Autodesk applications.

There are several points to consider before you install the vault server and migrate the data:

- If you upgrade from Autodesk Inventor 2010 to Autodesk Inventor 2011, upgrade the data management server 2010. This server is required for Inventor 2011 Content Center. The database remains installed so you can migrate the data into the new version.

NOTE It is critical that you make a backup copy of your data before you uninstall the Vault server.

- At the end of the Vault server upgrade, you are prompted to start the data management server console. If you click the default value for the prompt Yes, it launches the server console when installation of Autodesk Inventor 2011 is completed.
- The first time the server console starts, it looks for existing data management server databases for migration. The data management server database, with all the Autodesk Inventor 2010 and user Content Center libraries, is located and submitted for migration. The options available for migrating libraries vary, according to the versions of Inventor and the data management server involved.

- It is important to differentiate between read-only Inventor standard content libraries and user read/write libraries.
- The library migration is necessary before libraries are available for Content Center.
- Once libraries are migrated and Content Center (CC) can consume them, then CC requests an update of user read/write libraries. The CC Update tool takes care of the CC data being correct for the new Inventor version.
- If you upgrade from version 2010 to Inventor 2011, keep the version 2010 standard content libraries until the update is finished. Then remove them manually.

Test Migration

With your data safely backed up, we recommend that you perform a test migration on a small set of data. Make a copy of a small project or a subassembly of a larger project, and then execute the migration. You can identify any potential problems and calibrate your environment to predict how much time is going to be required to complete the migration.

Vault Migration

The data management console can migrate a vault from one release to another by migrating in place or migrating through a temporary vault. As in any migration, the first step is to back up vault data.

Tips about migrating vaults

- You can upgrade Vault 2011 only from Vault 2009, and 2010. If you upgrade from a version older than 2009, migrate to 2009 or 2010 first, and then migrate to 2011.
- You can migrate an Autodesk® Manufacturing Vault to Autodesk Vault Professional only.

For detailed information about Vault migration, back ups, and restoring vaults from backups, see the *Autodesk Vault 2011 Implementation Guide* on your product media.

Other Sources of Information

For more information about migrating data, see the white papers located on the Autodesk Inventor product media.

For more information about migrating with Vault, see the *Autodesk Vault 2011 Implementation Guide* located on the product media.

For information about how installations of new versions of Autodesk Inventor and the vault server affect Content Center, refer to the white papers on the product media:

- *Content Center for Inventor 2011 Side-by-side Installation*
- *Autodesk Inventor 2011 Content Center Installation Guide*

If you have any doubts about the steps involved or the right process to use at your site, contact your reseller before you go any further.

Register and Activate Products

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Only one registration process is required to activate all your Autodesk® Inventor® software products with standalone installations. The first time you enter your registration settings, you create a single user ID and password. Then you can enter the user ID and your password to activate each product the first time you launch it.

Your user ID is also used for access to the Subscription Center.

Check Product Information

You can view detailed information about your Autodesk® product and your product license (such as the license usage type and the license behavior). You can then save this information as a text file.

License usage types include:

- **Commercial** To license a product that was purchased commercially.
- **Educational (EDU) Institution** A license designed specifically for educational institutions.
- **Not for Resale** To license a product that is not sold commercially.
- **Student Version** To license products for students who are using an Autodesk product as part of their curriculum.
- **Trial** A temporary license that allows individuals to try the product. This license expires after a predefined period.

License behaviors include:

- **Permanent** Allows permanent use of an Autodesk product.
- **Term Extendable** Allows access to an Autodesk product for a limited time. The term can be extended at any time.
- **Term Non-Extendable** Allows access to an Autodesk product for a limited time. The term cannot be extended.

To view product information

- 1 On the Help menu, click About.
- 2 In the About (Autodesk product) window, click Product Information.
- 3 In the Product License Information dialog box, view details about your product and the product license. When you are finished, click Close. Click OK.

To save license information as a text file

- 1 On the Help menu, click About [Autodesk product].
- 2 In the About [Autodesk product] window, click Product Information.
- 3 In the Product Information dialog box, click Save As.
- 4 In Save As dialog box, *.txt* is the default file type. Enter a file name and choose a location where you want to save the file, and then click Save.
- 5 In the Product License Information dialog box, click Close. Click OK.

Activate Autodesk Products

You can activate your Autodesk product with a standalone installation either when you start the program. Alternatively, use the Help ► About menu while you are running the product.

To activate Autodesk products from the Help menu

- 1 On the Help menu, click About [Autodesk product].
- 2 In the About [Autodesk product] window, click Product Information.

- 3 In the Product Information dialog box, click Activate.
- 4 In the Autodesk Product Licensing dialog box, Product License Activation window, select Activate, and then click Next
- 5 On the Register Today page, follow the on-screen instructions.

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