

GENIUS TOOLS[®] 

Startup TOOLS

Release 7.0.2.0

Migration information

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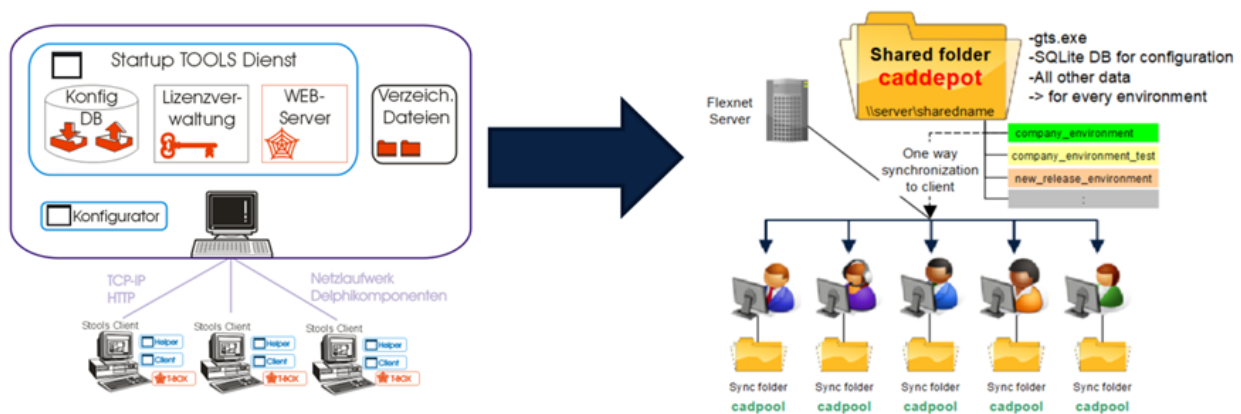
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1 Preliminary remarks

When updating the Startup TOOLS to Release 6.0, a migration process is necessary. There is a fundamental change in the software architecture. As of Release 6.0, the Startup TOOLS include the product GENIUS TOOLS Starter as configuration solution. The conversion results in additional effort in the update planning and execution.

The most important changes in philosophy are:

- Conversion from network drive to synchronization
- No Windows server required anymore
- License conversion to standard technology FLEXNET



New architecture without network drive: Everything is synchronized locally.

Advantages of the new Startup TOOLS 6.0

- Any number of Startup TOOLS releases and versions can be used in parallel in different operating environments.
- Operating environments can also be created as production, test, development or other environments.
- All relevant data is stored locally and is synchronized with the server. This has the following advantages:
 - Fastest possible Creo Parametric start.
 - Business units with slow network connection can be included without parallel installations (e. g. at distributed locations).
 - Convenient offline operation.
- Standard licensing via FLEXNET, licenses can be borrowed.
- Simple message system from administrator to user.

- Additional PTC desktop applications can be launched.

Tip: The migration / update process can be performed in parallel. This means that the previous Startup TOOLS installation can still be used!

2 Important changes at a glance

The configuration database of the Startup TOOLS 20xx is transferred to a SQLite DB. All settings (projects, users) are retained. The basic mechanisms for handling configuration files (PRO, UI) and batch files continue to work as usual. Nevertheless, the following changes have been made, which may have significant effects in individual cases.

Local storage requirements

Local storage space is required on each application computer that hosts the synchronized operating environments.

- A operating environment corresponds approximately to the previous *stools* directory.
- The typical size of a operating environment is approximately 1-5 GB (only required data). Backup copies made according to the previous process (setups, directory copies) should no longer be stored in this memory area.
- With several operating environments (productive and test environment) the storage space requirement multiplies accordingly.

GENIUS TOOLS License Manager

Install the GENIUS TOOLS License Manager (FLEXNET service) for licensing. In most cases, the GENIUS TOOLS License Manager will be installed on the computer running the PTC License Manager as well. The two services can be used in parallel without additional configuration.

Configuration databases

Only one configuration database is supported per working environment.

Local copying with administrator rights is no longer possible.

There is no Startup TOOLS WEB-Server anymore.

- There is no WEBLink TOOLBOX anymore. The functionality was replaced by the toolkit application *GENIUS TOOLS for Creo*.
- There is also no additional support to force WEBLink registration or to create entries in the trusted sites of IE. By default, WEBLink works via the *config.pro* entry
`web_enable_javascript = on.`
- MS ACCESS databases connected via PHP can be converted to SQLite. If this is not possible, it is necessary to install a separate WEB server with PHP API (e.g. XAMPP).

Consolidation of BATCH files

- Of the previous file types, only *start*.bat* and *stop*.bat* are still supported.
- The file types *env*.bat* and *runonce*.bat* have been removed.
- Additionally, *prestart*.bat* files can be used.

New environment variables from GENIUS TOOLS Starter

- In future, the environment variables of GENIUS TOOLS Starter will be used in the Startup TOOLS. They all start with *GTS_*.
- There are alternatives in the GTS format for the previous Startup TOOLS variables (except *SUT_WEBSERVER* and *SUTPROEVER*).
- GENIUS TOOLS starter continues to generate the old variables so that the variables do not have to be changed in all batch, configuration and other files. However, it is strongly recommended to switch to the new variables.

Ghostscript PDF

Ghostscript PDF output is no longer available.

New configuration UI

GENIUS TOOLS for Creo come with the new administrative tool *Configuration Utility*.

- The configuration settings of the *GENIUS TOOLS for Creo* toolkit application can now be comfortably edited and saved using a graphical user interface.
- The configuration settings are now combined in 2 files, which can be located at the configured locations (4 layers - APP, UNIT, PROJECT, USER). The files should only be edited via *Configuration Utility* and contain only changed options. The file *gt_main.cfg* remains in use. All other files are combined into the file *gt_modules.cfg*.

3 Migration process

The description in this document refers to the migration process only. Please also consult the installation manual and general manual for *GENIUS TOOLS for Creo* if required.

3.1 Migration planning

Migration situations

If Startup TOOLS 20xx is updated to Startup TOOLS 6.0, the most common reason is the update to a newer Creo Parametric Release.

Up to Creo 2.0 (in exceptions Creo 3.0) the WEblink TOOLBOX was used. Since Startup TOOLS 2017 (Creo 3.0 and higher), the *GENIUS TOOLS for Creo* are available. This solution is fully implemented as of Startup TOOLS 2018.

Warning: The migration process of the WEblink TOOLBOX to the toolkit application *GENIUS TOOLS for Creo* is not described in this document! Depending on the use and adaptation of the WEblink TOOLBOX, this process can be more complex than the migration process to the configuration solution GENIUS TOOLS Starter.

In principle, automatic migration is possible for versions 2013/2016/2017/2018. For older Startup TOOLS/Creo/Wildfire releases, a new installation of Startup TOOLS 6.0 is recommended, followed by manual transfer of the configurations and data. If this is not possible, please contact INNEO directly.

Warning: This description assumes standard installation and use of the Startup TOOLS 20xx. This means that there is a Startup TOOLS server with a share that is connected to each application computer as a network drive.

Migration planning

- On which computer/NAS should the Caddepot be placed? The Caddepot is a shared directory in which the originals of the working environments are located. This documentation assumes that the Caddepot is located on the previous Startup TOOLS server. This means that this computer is also the installation computer, i.e., the setups are executed on it.
- In which directory (Cadpool) should the synchronized working environments be stored on each application host? Example path: *C:\inneo\cadpool*. It is recommended to have the same directory name on all hosts. Each user must have full write access to this directory.

- The previous Startup TOOLS folder is not used directly for the migration. It has to be copied and cleaned first. The copy is no longer needed afterwards. Hard disk space must also be provided for the temporary copy.
- On which computer should the GENIUS TOOLS License Manager be installed? Make sure you have all required licenses before starting the migration.
- Download the Startup TOOLS 6.x software.

Summary

- The focus is on the required hard disk space on the application hosts (Cadpool) and the central Caddepot.
- The share used for the Caddepot must be accessible from all application hosts via UNC syntax (\\<servername>\<share name>) with read permissions.

3.2 Running the migration

Install GENIUS TOOLS License Manager.

- a. Log in to *ftp://ftp.inneo.de/gt/gtflex/* using the user name and password *startuptools*.
- b. Download the latest version of the License Manager software from the directory *latest_gtflex_x_x*.
- c. In the same directory, open the installation and configuration manual (*Install_GT-LicenseManager_de.pdf*) and follow the instructions.

Copy the previous Startup TOOLS directory. Stop the Startup TOOLS service before starting the copying process.

Please note: If the Startup TOOLS service cannot be stopped for copying, it is not possible to copy the ABS database(s). In the future, only one configuration database will be supported. Rename an **abs.bak* file in the copied data to *sut.abs*.

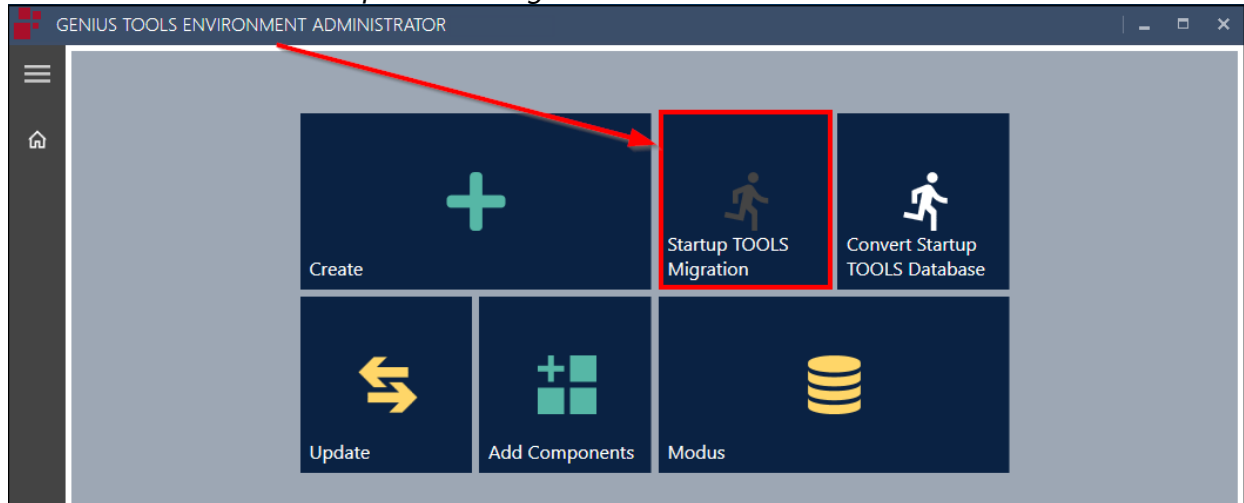
Clean up the copied directory (setups, backups). This reduces the data that has to be synchronized.

Run the software setup of Startup TOOLS 6.x on the administration server (e.g., installation path *C:\inneo*). This creates the directories *caddepot*, *installdepot* and *mediadepot*.

Migrate the copied directory into a operating environment:

1. Start GENIUS TOOLS Environment Administrator (*GTSA.exe*) from the directory *installdepot* (e.g., *C:\inneo\installdepot\gtsa_latest*).

2. Select the function *Startup TOOLS Migration*.



3. On the first dialog page, specify the data sources.

The screenshot shows the 'STARTUP TOOLS' dialog box. It has three numbered tabs at the top: 1 (selected), 2, and 3. The 'STARTUP TOOLS' section contains two fields: 'Installation directory' with a text input containing 'C:\stools-copy' and a folder icon, and 'Select database' with a dropdown menu.

4. Under *Installation directory*, enter the path to your copy of the old Startup TOOLS installation (stools). You can also give a UNC path.
5. Under *Select database*, select the database *sut.abs*. If there is no database with this name, select a database that should be converted.
6. On the second dialog page, specify the software version to be used.

The screenshot shows the second dialog box with two sections. The 'WORKING ENVIRONMENT' section has 'Caddepot' with a text input containing 'C:\INNEO\caddepot' and a folder icon, and 'Environment name' with a text input containing 'INNEO_Production'. The 'SOFTWARE' section has 'Installdepot' with a text input containing 'C:\INNEO\installdepot' and a folder icon, and 'Select software version' with a dropdown menu showing '6.0.1.0'.

7. Select the Caddepot directory to be used (e.g., *C:\inneo\caddepot*).
8. Enter a name for the operating environment (e.g., *company-name*).
9. Select the Installdepot from which to get the GENIUS TOOLS software.

10. Select the version of GENIUS TOOLS Starter to be used.

11. On the third dialog page, configure the license server and the synchronization between the server (Caddepot) and the operating environment on the local computer (Cadpool).

The screenshot shows a software configuration window titled 'GENIUS TOOLS LICENSE SERVER'. At the top, there are three numbered tabs (1, 2, 3), with tab 3 being the active one. The window is divided into two main sections. The first section, 'GENIUS TOOLS LICENSE SERVER', contains a 'Source' label and a text input field with the value '7766@localhost'. The second section, 'SYNCHRONIZATION SERVER SETTINGS', contains four labels with corresponding text input fields: 'Name' with 'INNEO', 'Server Path' with '\\inneosrv\caddepot', 'Synchronization interval' with '15', and 'Target directory' with 'C:\cadpool'.

12. Enter the license server in the format *Port@ServerName* (e.g., *7766@<license_server_name>*).

13. Enter a descriptive server name.

14. Enter the path to the Caddepot on the server. Use either UNC syntax (*\\GTSServer\caddepot*), environment variables (*%GTS_SERVER_NAME%*), or a mixed format (*\\%GTS_SERVER_NAME%\caddepot*).

15. Specify the synchronization interval in minutes.

16. Enter the target directory in which to save the local copy of the operating environment. A subdirectory with the name of the operating environment will be created. Use absolute paths (*C:\cadpool*) or environment variables (*%GTS_SYNC_DESTINATION%*).

17. Click *Migrate* to start the migration process. The migrated operating environment will be in the Caddepot directory and contain all project settings.

This completes the migration function. Now set up the first application computer. Typically, the first application computer is the administration server.

Each application computer needs to run an initial synchronization, which means that the operating environment has to be copied in full from the Caddepot directory on the server to a new Cadpool directory. The copying and other initialization steps can be performed by GENIUS TOOLS Starter. To use GENIUS TOOLS Starter, start it from the Caddepot directory:

1. Start GENIUS TOOLS Starter from the operating environment of the Caddepot (*<Caddepot_path>\<work_environment_name>\software\gts.exe*) on the application computer (e.g., *\\<server>\<share>\<work_environment_name>\software\gts.exe*).

2. When the central *gts.exe* is started, the software recognizes that the application computer does not yet have a Cadpool directory and operating environment. This triggers the following initialisation actions:
 - a. Creating the local directories
 - b. Copying the operating environment
 - c. Creating a desktop icon
 - d. Creating an autostart entry in the registry
 - e. Stopping GENIUS TOOLS Starter (central *gts.exe* from the Caddepot directory)
 - f. Starting the local GENIUS TOOLS Starters (*gts.exe* from the Cadpool directory)

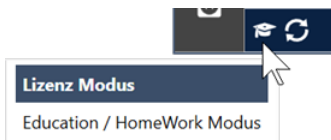
Checking the status bar

The status bar of GENIUS TOOLS Starter should then display a full license and look like this:



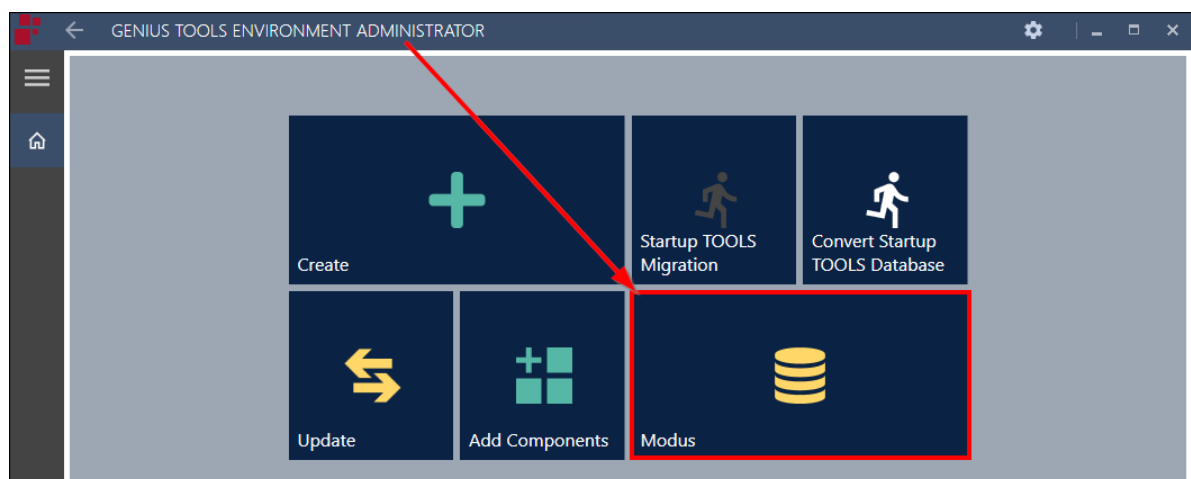
GENIUS TOOLS Starter Status Bar

If the license is given as below, you need to check your license status.



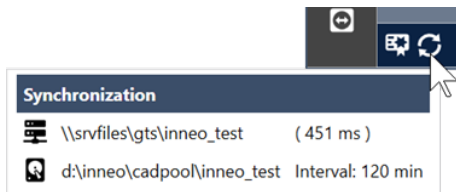
Check whether the license is available or whether, for example the license server has not been entered correctly in GENIUS TOOLS Starter.

Use the *Modus* function in GENIUS TOOLS Environment Administrator to make any required changes:



Please note: Start *gts.exe* with the option `-gts:licDebug` to get error messages from GENIUS TOOLS License Manager.

The status bar of GENIUS TOOLS Starter should show a synchronization status as given below if the synchronization settings are correct:



Standard synchronization status

Use the *Modus* function in GENIUS TOOLS Environment Administrator to make any changes to the settings.

If you are not doing a Creo update at the same time, that is, you keep on using Creo 3, 4 or 5, then the started projects in your new operating environment should behave exactly as they did in the previous Startup TOOLS.

However, there are several common reasons why this may not always be the case. For more information, please refer to [Testing and troubleshooting](#).¹⁵

4 Final steps

Use the first application computer, typically the computer of the Startup TOOLS administrator, to check whether all Creo projects behave as before. Adjustments to your environment may be necessary.

Please note: The Windows user of the application computer has to have full write permission in the working environment of the Caddepot in order to be able to make changes to the configuration!

It is recommended to configure the administrator's account as the next step.

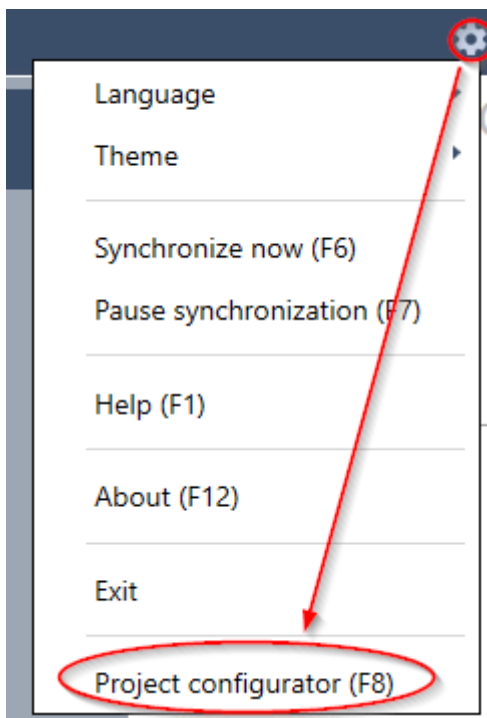
4.1 Configuring the admin account

This section describes how to configure the administrator's account on the first application computer.

To follow the steps below, open the GENIUS TOOLS Starter App on the application computer.

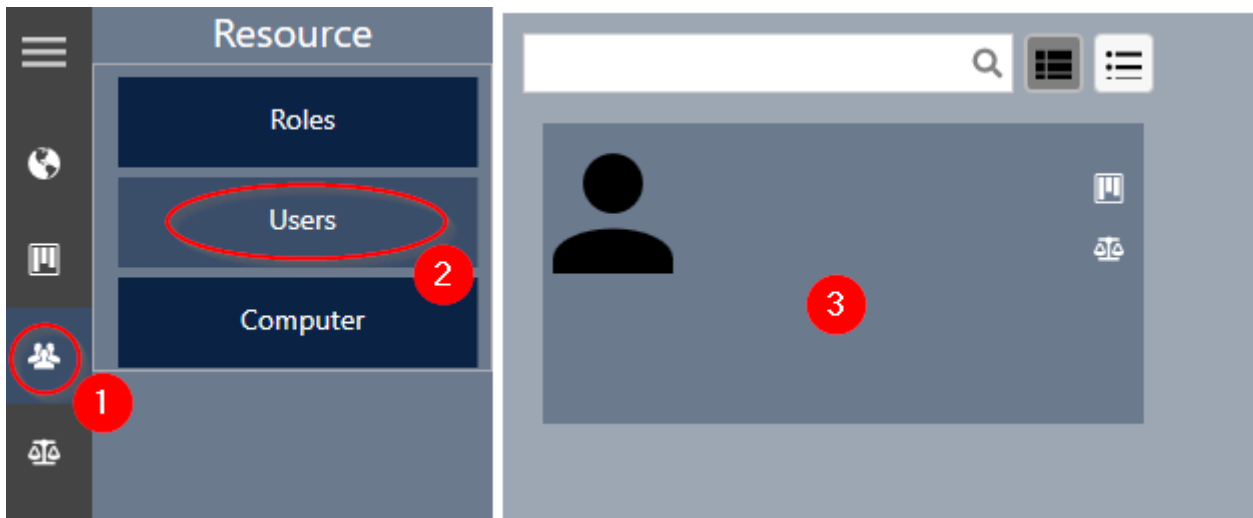
Setting up the administrator in GENIUS TOOLS Project Configurator

1. In the settings (gear symbol), select *Project Configurator*.

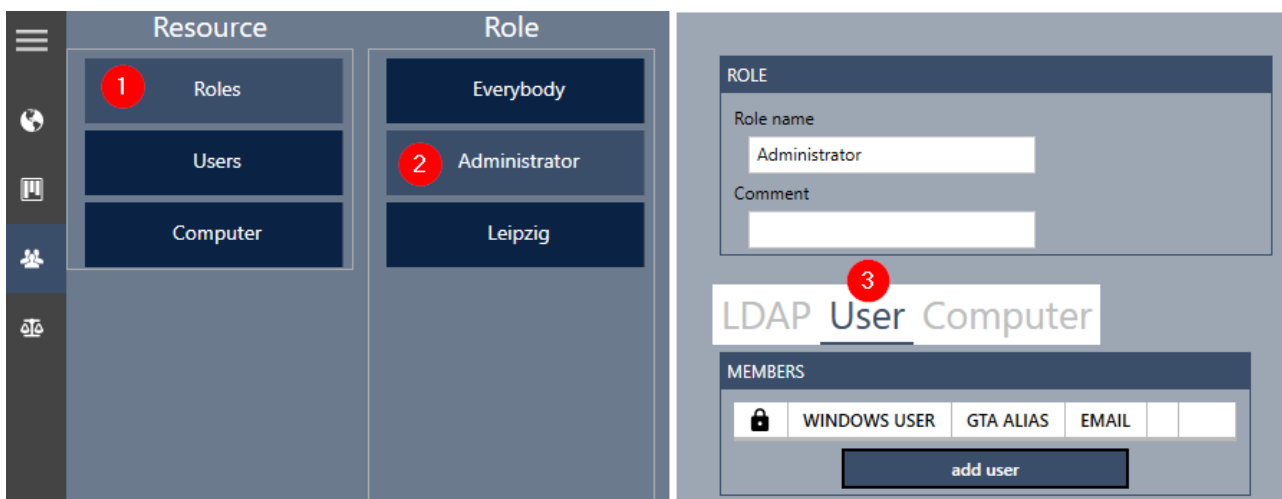


2. To add a new user, select *Resources* in the sidebar menu.

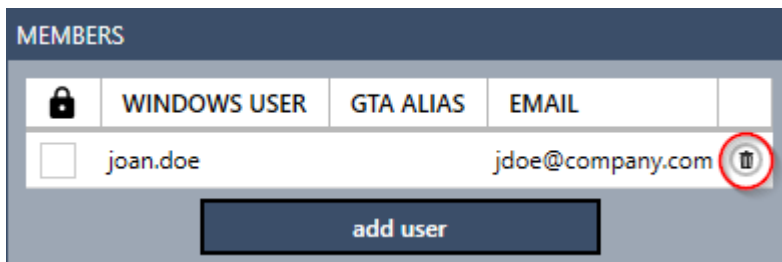
3. Click *Users*. The existing users are displayed.
4. Double-click on an empty card. The dialog for entering the user data is displayed.



5. Enter your Windows user name and other user data and save.
6. Click on *Users* again. The new user is assigned to the roles *Everybody* and *Administrator*, which are in turn assigned to the access groups of the same name. The user's group assignment is marked with a green bar and a blue bar.
7. To configure the users assigned to the role *Administrator*, select *Resource > Roles > Administrator*.
By default, the role *Administrator* is assigned to the access group *Administrator*, giving administrative rights to all members of the role.
8. In the details pane for the role, select the tab *User*.



9. Click *Add user* to add other users to the role *Administrator*.
10. Select the users that should be administrators and save.
11. To delete users that should not have administrative rights, click the trash can symbol to the right of the user name.



4.2 Configuring the work environments

To make administrative changes that apply to all users, you have to save the changes in the Caddepot instead of letting Startup TOOLS save them in the Cadpool, which is the default.

Warning: Each user works with the data copied from Caddepot in their Cadpool directory. Any changes that are made in the Cadpool will disappear with the next synchronization. Changes that are meant to apply to all users have to be made in Caddepot.

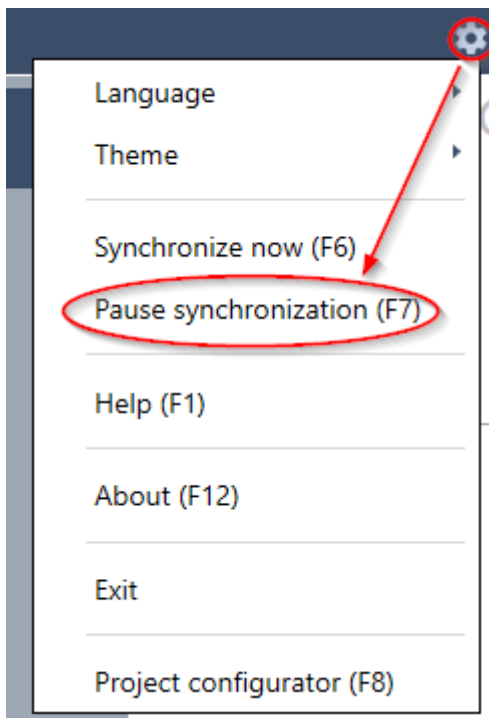
There are different methods for making changes in Caddepot:

- Pause the synchronization: Pause the synchronization on the application computer, then copy the changes manually from Cadpool to Caddepot.
- Network mode: Work directly in the Caddepot operating environment.
- Local mode: Work directly on the administration computer. Creo has to be installed on the administration computer to do this.

For major changes, e.g., for the first setup, we recommend working directly on the original Caddepot data (local mode). If this is not possible, for example because Creo is not installed on the administration computer, we recommend pausing the synchronization.

Pausing the synchronization

In the settings (gear symbol), select *Pause synchronization*.



Saving your changes

Copy all files that you have changed and save them to the administration computer's Caddepot.

Re-activate the synchronization via the settings in GENIUS TOOLS Starter.

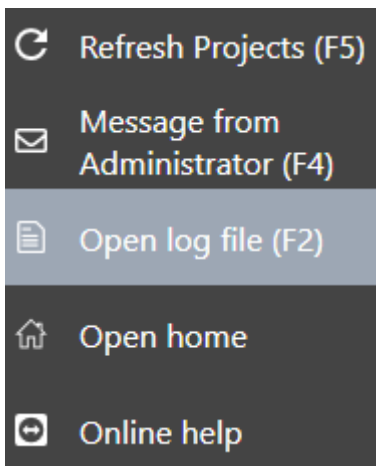
4.3 Testing and troubleshooting

This section describes the process for testing and troubleshooting a new operating environment.

In a new operating environment, you should first start all configured projects. Start the project first that has the most users and the most customizations and additional applications.

If errors occur, refer to the log files for more information. The log files are stored in the user's HOME directory.

Alternatively, you can open the log directly from the sidebar.



The following typical problems can occur.

Project is not listed

- The license is invalid. Verify the license mode.
- The Creo version used by the project is not present on the application computer. Check the log file.

Projekt does not start Creo

Most likely the original Startup TOOLS environment did not use environment variables consistently. Absolute paths which are not available in the new local operating environment may have been used in batch files.

For example, previous versions used the variable `STOOLS_CFG_LW` for the letter of the network drive. This variable is still supported, but points to `<cadpool>\<work_environment_name>`. Please use the variable `GTS_ROOT_DIR` in new environments. Also, the network drive letter may have been used directly, which does not work in the new operating environment.

Please note: Remove the network drive previously used for Startup TOOLS from the test client. Otherwise, erroneous entries may not pop up since the projects appear to work correctly.

Analyse the log file.

Replace all absolute paths with GENIUS TOOLS Starter variables.

Creo does not behave as expected

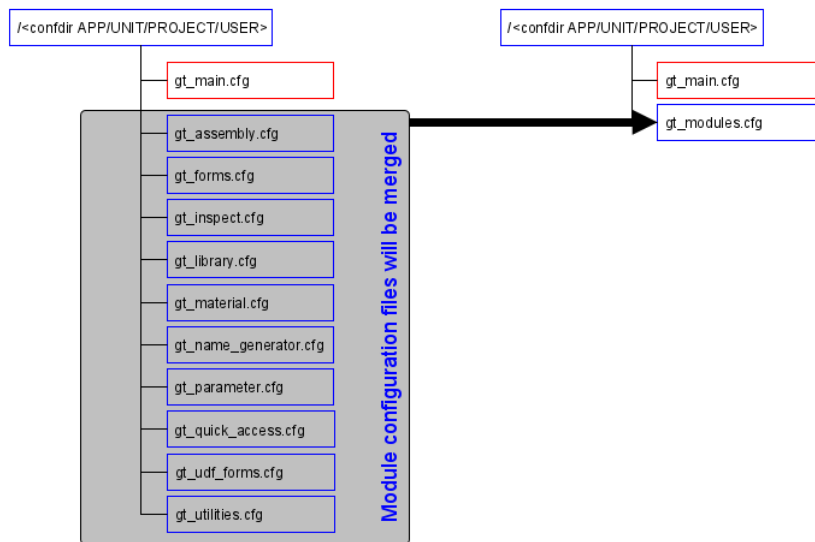
This problem is most often caused by environment variables in entries in the files *config.pro* or *protk.dat*. Start by checking the entries within the Creo Parametric session.

4.4 Configuration files

Release 6.0 of the Startup TOOLS comes with changes in the management of configuration entries for GENIUS TOOLS for Creo.

You do not have to manually edit configuration text files anymore. The new software GENIUS TOOLS Configuration Utility gives you easy access to the current configuration settings and also lets you edit all entries and save them to the correct locations. The structure of the configuration files will be changed when you first use Configuration Utility.

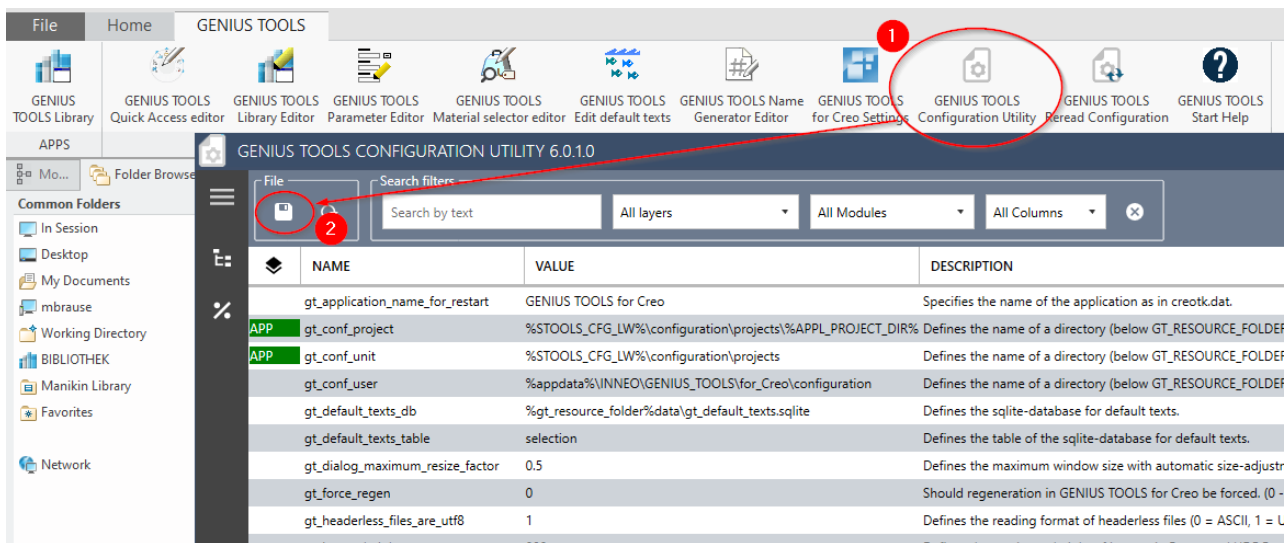
GENIUS TOOLS for Creo - Merging the configuration files



The file `gt_modules.cfg` will only contain entries that differ from the default values.

Configuration Utility also lets you add variant values as comments and access comments from the graphical user interface. In this way, administrators can easily check multiple configuration variants without having to re-type each value manually.

When you first set up Startup TOOLS 6.0, open the Configuration Utility from Creo (1) and save the configuration (2).



Saving will write all configuration entries that do not have the default values to the new file *gt_modules.cfg*.

The old configuration files will not be deleted but saved to a ZIP archive in the same directory.

Any existing comments will not be written into the new configuration files. Configuration Utility comes with a new comment functionality. For more information, please refer to the section on Configuration Utility in the GENIUS TOOLS for Creo help.

5 Copyright

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INNEO Solutions GmbH

Rindelbacher Str. 42

73479 Ellwangen

Germany

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