HELiOS

UNLIMITED PLM PERFORMANCE **DEVELOPED BY ISD**

Migrating the local Workspace in case of an update

to HELiOS 2019 SP 2 or higher

I·S·D

THE WORLD OF CAD AND PDM SOLUTIONS

Legal Notes:

What is a local Workspace and what has changed?

For some interfaces and for the HELiOS Desktop, HELiOS uses a local directory to which files for viewing or editing are transferred.

In older versions, there was one Workspace per interface. To be able to edit and update files across different applications, we have successively migrated the HELiOS interfaces to one new, central, application-spanning Workspace.

From HELiOS 2019 SP 2 onwards, the old, application-specific Workspace will no longer be supported, and users who have used this Workspace must update to the new Workspace.

To see whether you are affected by this change, please read the information given in the following chapter.

Who is affected?

In the table below you will find a list of HELiOS interfaces which have used the old Workspaces in the past.

The column **Old Workspace active until** shows the HELiOS versions in which the old Workspace was activated by default in the appropriate **Interface**. There are also Integrations (e.g. Inventor), in which the new Workspace was active from a certain version onwards, but still allowed a simultaneous working with the old Workspace. In this case the column **Old Workspace supported until** shows the HELiOS versions that still allowed a working with the old Workspace.

Interface	Old Workspace active until	Old Workspace supported until
Inventor	< 2401	<2402
AutoCAD (Mechanical)	<2402	<2402
SOLIDWORKS	<2400	<2400

If you do not use any of the interfaces shown above in your HELiOS working environment, or if you already use the new Workspace for these interface, no migration of the local Workspace will be necessary, and you should be able to update to the newer HELiOS version without any problems.

What can I do if I do not know for sure whether I am affected?

If you use one of the interfaces listed on the previous page but do not know whether you use the old Workspace, or whether its use would be problematic in case of an update, you can call the **Workspace Manager** in the HELiOS Desktop.

Choose **HELiOS Options > Database**.

On the tab for the interfaced application, click on the **Local session** button.
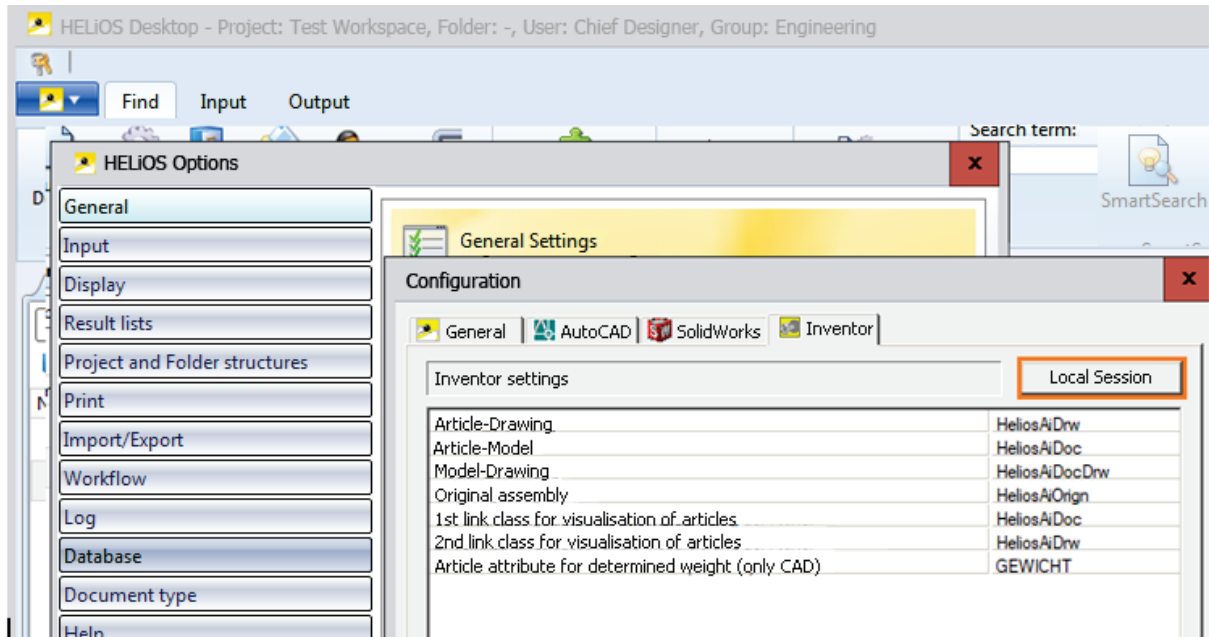
The **Workspace Manager** provides you with an overview of all currently used Workspaces.

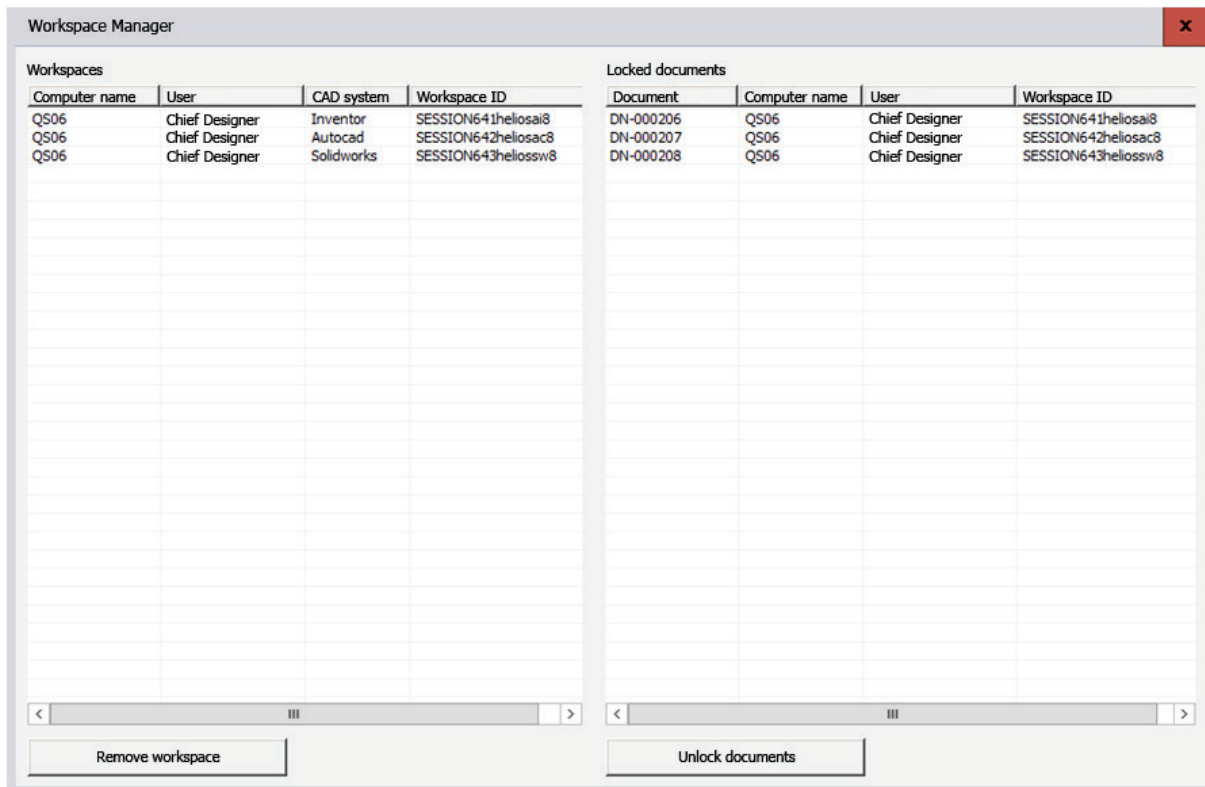You can recognize old Workspaces by the name of the interfaced application in the column **CAD System**, in conjunction with a **Workspace ID**, beginning with "SESSION" in the same named column.

If you see any documents for these Workspaces on the right hand side of the dialogue window, you will need to make the necessary preparations described in the next chapter before carrying out the update. Otherwise, you should be able to perform the update immediately without any problems.

Which preparations are required for the update if I am currently still using the old Workspace?

If you are still using the old Workspace, you must carry out the following steps prior to the update:

1. All employees must remove all files that are still located in an old Workspace.

   Please let your employees start the respective application that is interfaces with HiCAD. Then, decide whether the modifications of documents that are currently being edited are to be taken over (✅ Check-In) or discarded (❌ Cancel).
   If the currently edited document contains any local changes which have not been saved to HELiOS yet, the document should be saved to HELiOS prior to the check-in to HELiOS, to be on the safe side.

   Next, remove all documents from the (old) Workspace (mark rows and click on 🗙) and close the application.
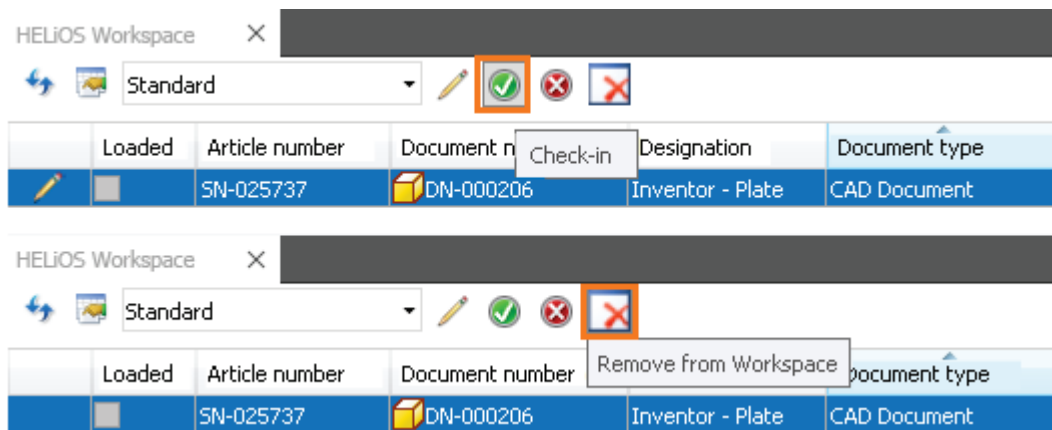
2. Start the **Workspace Manager** as described in the previous chapter and check whether there are still locked documents in an old Workspace.

   This can still be the case even if you proceeded as described in Paragraph 1, e.g. if the old Workspace was located on a computer that does not exist anymore, or if an employee is currently on vacation.

   In such cases you can still unlock the affected documents with the **Unlock documents** button. Please note however that modifications of locked documents that have not been saved to HELiOS will then be discarded.

As soon as no locked documents which are still located in an old Workspace appear on the right hand side of the **Workspace Manager** any more, you can carry out the update to HELiOS 2019 SP 2.

What will happen if I attempt to carry out the update without cleaning up the old Workspaces?

If you try to update the database to the most recent database subversion with the help of **HeliosDbUpdate.exe**, the tool will check whether any documents in older Workspaces have currently been reserved for editing.

If this is the case, the following error message will be displayed:
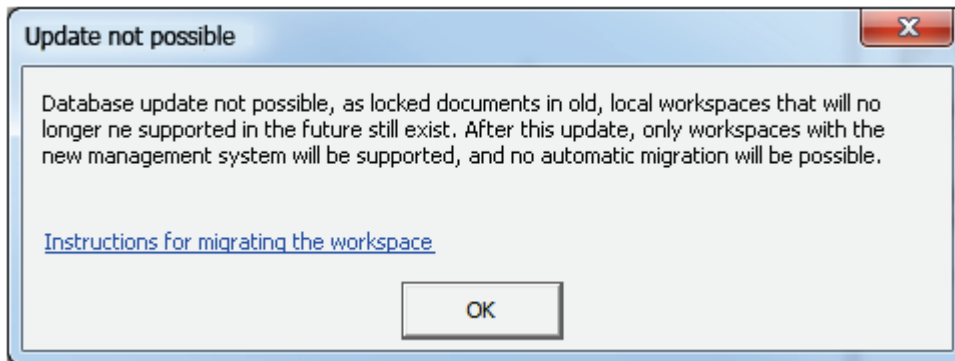
The database subversion update will then not be possible.

Please bear in mind that a successful database subversion update is mandatory for the working with HELi-OS 2019 SP 2. To ensure that all employees can instantly work with HELiOS 2019 SP 2 after the update, you need to perform the steps described in the previous chapter, so that the database subversion update can be performed without any problems.
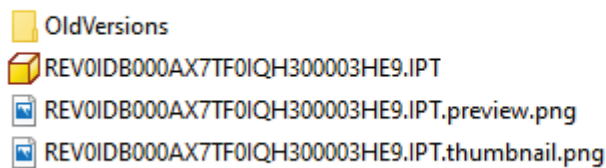
What else can I do after a successful update?

After a successful update to HELiOS 2019 SP 2 the old Workspaces will no longer be used. You can therefore now remove any directories that belonged to an old Workspace on any HELiOS client without any risks.

You can find the old Workspace directories on your system at **AppData > Local > ISD Software und Systeme > …**
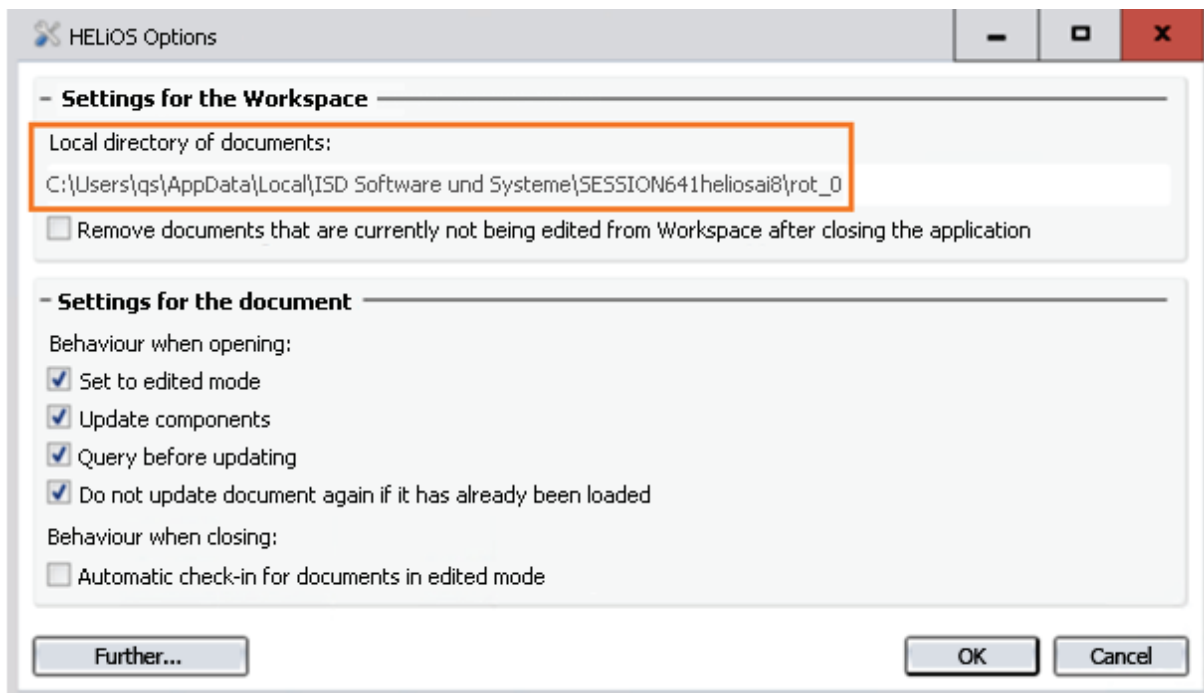
The names of the respective directories correspond to the **Workspace ID** of the **Workspace Manager** described in one of the previous chapters.

An example: "SESSION641heliosai8"

> AppData > Local > ISD Software und Systeme > SESSION641heliosai8 > rot_0 >

OldVersions
REV0IDB000AX7TF0IQH300003HE9.IPT
REV0IDB000AX7TF0IQH300003HE9.IPT.preview.png
REV0IDB000AX7TF0IQH300003HE9.IPT.thumbnail.png

You can also take the path from the **HELiOS Options** dialogue window of your interfaced CAD application before the update. There, you can find the path beneath **Settings for the Workspace: Local directory of documents**:

HELiOS Options

Settings for the Workspace

Local directory of documents:

C:\Users\qs\AppData\Local\ISD Software und Systeme\SESSION641heliosai8\rot_0

☐ Remove documents that are currently not being edited from Workspace after closing the application

Settings for the document

Behaviour when opening:
☑ Set to edited mode
☑ Update components
☑ Query before updating
☑ Do not update document again if it has already been loaded
Behaviour when closing:
☐ Automatic check-in for documents in edited mode

Further...   OK   Cancel

After unlocking of the old Workspace directory on the Clients, you can also remove the corresponding entries on the left hand side of the **Workspace Manager**. Please make sure that you actually remove only old Workspaces - otherwise, there may be loss of data.

The clean-up described in one of the previous chapters is optional. If you do not carry out this clean-up, entries for the old Workspace will remain in the database, which, however, will not have any negative effects.

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