Migrating the local Workspace in case of an update to HEliOS 2019 SP 2 or higher
Legal Notes:

© 2019 ISD Software und Systeme GmbH. All rights reserved.

This document and the software described herein are provided in conjunction with a license and may only be used or copied in accordance with the terms of the license. The contents of this User Guide solely serve the purpose of information; it may be modified without prior notice and may not be regarded as binding for the ISD Software und Systeme GmbH. The ISD Software und Systeme GmbH does not assume any responsibility for the correctness or accuracy of the information provided in this document. No part of this document may be reproduced, saved to databases or transferred in any other form without prior written permission by the ISD Software und Systeme GmbH, unless expressly allowed by virtue of the license agreement.

All mentioned products are trademarks or registered trademarks of their respective manufacturers and producers.
Migrating the local Workspace in case of an update to HELiOS 2019 SP 2 or higher ........................................................................... 1

What is a local Workspace and what has changed? ................................................................................................................................. 4

Who is affected? ......................................................................................................................................................................................... 5

What can I do if I do not know for sure whether I am affected? ........................................................................................................... 6

Which preparations are required for the update if I am currently still using the old Workspace? ....................................................... 8

What will happen if I attempt to carry out the update without cleaning up the old Workspaces? ...................................................... 9

What else can I do after a successful update? ................................................................................................................................... 10
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.

<table>
<thead>
<tr>
<th>Interface</th>
<th>Old Workspace active until</th>
<th>Old Workspace supported until</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inventor</td>
<td>&lt; 2401</td>
<td>&lt;2402</td>
</tr>
<tr>
<td>AutoCAD (Mechanical)</td>
<td>&lt;2402</td>
<td>&lt;2402</td>
</tr>
<tr>
<td>SOLIDWORKS</td>
<td>&lt;2400</td>
<td>&lt;2400</td>
</tr>
</tbody>
</table>

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:

![Update not possible](image)

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 HELiOS 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: “SESSION641helmiosai8”

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:

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.