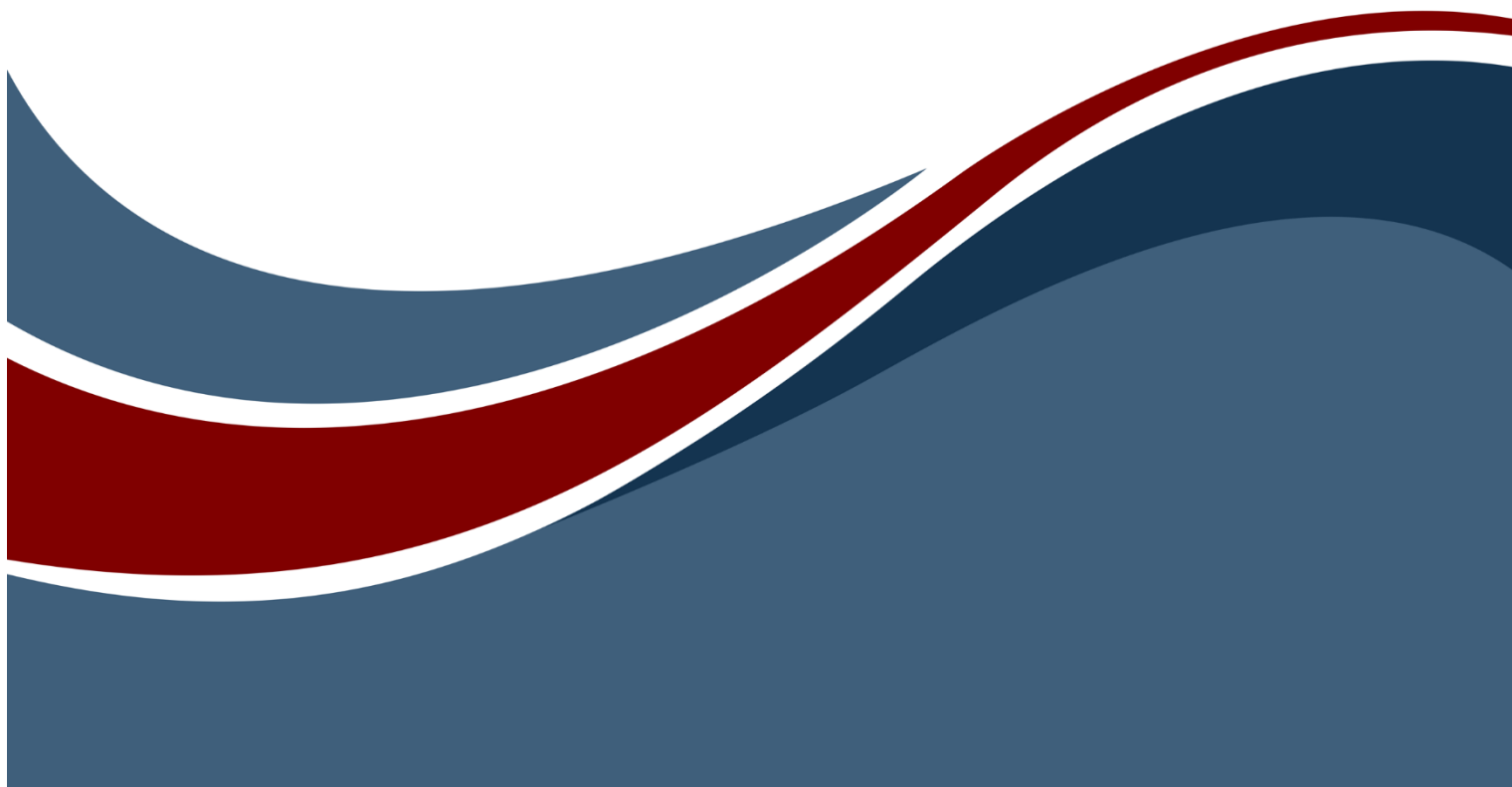




Installation Guide



Installation Guide

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GENESYS® is a trademark of Zuken Vitech Inc. and refers to all products in the GENESYS software product family.

Other product names mentioned herein are used for identification purposes only, and may be trademarks of their respective companies.

Publication Date: October 2021

TABLE OF CONTENTS

Getting Started	1
Overview of the GENESYS Product Family.....	2
GENESYS Collaborative Essentials.....	2
GENESYS Collaborative Spectrum	2
GENESYS Server.....	2
GENESYS Licensing Options	3
Named License.....	3
Floating License.....	3
Step 1: Installing GENESYS 2021 R2 Products	4
Installing GENESYS Collaborative Edition	4
Install Desired Connectors.....	9
Installing GENESYS Server.....	10
Installing GENESYS License Manager	16
Configuring Microsoft Windows Firewall for GENESYS	18
GENESYS 2021 R2 Collaborative Edition	18
Step 2: Licensing GENESYS Products.....	20
General Instructions for Activating a GENESYS License.....	20
Step 3: Getting Started with GENESYS 2021 R2	22
Logging in to a Local Repository	22
Logging in to a Remote Repository	23
Special Considerations for Previous Version Users	25
Installing GENESYS 2021 R2	25
Moving your data	25
FIPS 140 Compliance	25
Additional Tips.....	26
Check for Latest Service Packs.....	26
GENESYS Training	26
GENESYS Help and Documentation.....	26
Sample Solutions	26
Using Data from CORE™	26
Working with Report Files from CORE	26
Disaster Prevention/Recovery	26
GENESYS Server Backup/Data Recovery	27
Uninstalling GENESYS.....	27
Reporting Problems / Making Product Suggestions	27
Appendix	28
Prerequisites for Installation	28



CUSTOMER RESOURCE OPTIONS

Supporting users throughout their entire journey of learning model-based systems engineering (MBSE) is central to Vitech's mission. For users looking for additional resources outside of this document, please refer to the links below. Alternatively, all links may be found at www.vitechcorp.com/online-resources/.



[Webinars](#)

Immense, on-demand library of webinar recordings, including systems engineering industry and tool-specific content.



[Screencasts](#)

Short videos to guide users through installation and usage of GENESYS.



[A Primer for Model-Based Systems Engineering](#)

Our free eBook and our most popular resource for new and experienced practitioners alike.



[Help Files](#)

Searchable online access to GENESYS help files.



[Technical Papers](#)

Library of technical and white papers for download, authored by Vitech systems engineers.



[Technical Support](#)

Frequently Asked Questions (FAQ), support-ticket web form, and information regarding email, phone, and chat support options.

Our team has also created resources libraries customized for your experience level:

All Resources	Advanced
Beginner	IT / Sys Admin
Intermediate	Student

Installation Guide

GETTING STARTED

Welcome to the GENESYS 2021 R2 Installation Guide. This guide is intended to assist you with the three steps required for getting started using GENESYS:

- installing the software,
- activating a GENESYS license, and
- starting GENESYS.

If you have any problems or questions regarding installation, licensing, or training for your GENESYS products, contact us:

For installation or general product support

support@vitechcorp.com

To submit a license request

licensing@vitechcorp.com

For information on systems engineering and GENESYS

Visit our website at www.vitechcorp.com

or contact your Account Executive

+1 540.951.3322

info@vitechcorp.com

OVERVIEW OF THE GENESYS PRODUCT FAMILY

The GENESYS software suite brings the proven STRATA™ methodology together with an enterprise-ready architecture, giving you the ability to deliver model-based systems engineering (MBSE) seamlessly and consistently across your project team. GENESYS is an open architecture tool based on familiar standards, so you can focus on design and not trying to get disparate tools to work together. GENESYS takes the guesswork out of implementation and delivers on context-driven modeling for complex systems engineering problems.

GENESYS Collaborative Essentials

GENESYS Collaborative Essentials provides individuals, small teams, and distributed users a complete MBSE development solution ready for immediate use against a locally installed and maintained repository, yet also adds the ability to connect to a collaborative design environment as required. Enjoy a robust product that includes a rich requirements management capability, multiple modeling notations in traditional or SysML view sets, integrated discrete-event simulation, comprehensive architecture analysis, verification and validation, and robust, on-demand documentation.

GENESYS Collaborative Spectrum

Incorporating all of the features found in GENESYS Collaborative Essentials, GENESYS Collaborative Spectrum delivers comprehensive support for DoDAF 2.0 and SysML, including the full complement of available views and reports, providing a single vehicle that enables team-wide perspective and analysis and the industry-exclusive ability to deliver answers and insight in multiple formats, regardless of the input approach. Whether working independently or as part of the collaborative enterprise team, Spectrum provides the ultimate answer in capability and flexibility.

GENESYS Server

Part of a large, complex, or data-rich effort? Add GENESYS Server as a remote repository and enable GENESYS Collaborative Essentials and GENESYS Collaborative Spectrum users the ability to operate offline and independently or as part of the collaborative engineering team operating together in one concurrent database. GENESYS Server provides a secure, convenient gateway for the team to operate in unison, taking advantage of the team-wide consolidation of information.

As the engineering team centerpiece, GENESYS Server offers unparalleled ease of use, team-wide system-level insight, live access to the latest system changes, comprehensive analysis, and instant, thorough documentation.

GENESYS LICENSING OPTIONS

Vitech offers a variety of licensing options to provide flexibility in how GENESYS is deployed within your project team or across your organization. All GENESYS licenses are managed by the Sentinel License Manager which is installed with all GENESYS products and runs as a service. Please contact your Account Executive if you have questions about your specific configuration.

Named License

Named license files reside on your local hard drive. Frequently referred to as “node-locked” or local license, named licenses are the best option for environments with a one-to-one ratio of licenses to users and/or for teams that want to ensure full-time on-demand access to GENESYS across the team. Each computer is identified by a unique ID to which the GENESYS activation is locked. The licensing runs in the background and is completely transparent to the user. The only drawback is that the license is not mobile. You can move the license from one machine or location to another. To do so you must first submit a request to Vitech and may be required to pay a transfer fee before a license can be transferred to the new machine.

Floating License

Floating licenses are perfect for users who require portability of their GENESYS software (such as those traveling between multiple worksites) and teams looking to leverage concurrent-user tokens across a group of users. Floating licenses are available in two different forms:

Network Capable License — A network-capable license is the most flexible licensing approach, allowing you to seamlessly share licenses across your network. The *Sentinel License Manager* hosts any floating licenses activated on a machine. This manager is installed with all GENESYS software and makes these licenses available to any other GENESYS Collaborative Edition installations on the same network. If you prefer to host GENESYS floating licenses on a different machine (i.e., one that doesn't otherwise have GENESYS software installed), you may install the *GENESYS License Manager* on the host machine for that purpose.

USB License Key — The license file resides on a USB key which can be moved from machine to machine. This option provides the ultimate flexibility as you can work from home, customer sites, or multiple machines in your office. USB keys provide license flexibility for a single individual working in multiple sites or a small co-located team. Large or distributed teams will find more flexibility in a network capable license. A re-licensing fee does apply to lost USB license keys.

STEP 1: INSTALLING GENESYS 2021 R2 PRODUCTS

The following sections provide step-by-step instructions for installing the various GENESYS products. All GENESYS products should be installed by a user with appropriate installation permissions for the computer or server upon which the GENESYS product is to be installed. If you have a question about the group policies defined in your environment, please contact your system administrator or IT support group.

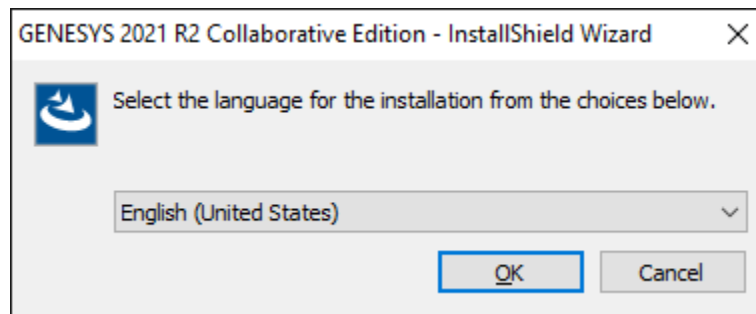
If you have any questions or need assistance at any point during this process, please contact Vitech Customer Support at +1.540.951.3999 or via email at support@vitechcorp.com.

Following product installation, please refer to Step 2: Licensing GENESYS Products to obtain and install a license for products in the GENESYS product family.

Installing GENESYS Collaborative Edition

Note: GENESYS Collaborative Edition requires connection to the internet to download SQL Server Express. If you are installing GENESYS onto a machine which does not have internet access you will have to download the SQL Server Express installer as well and install it separately. Please contact Vitech Customer Support if you need further instructions.

1. Download the GENESYS 2021 R2 Collaborative Edition installer from the Vitech website and open the file using the *Run as administrator* option from the context menu. The InstallShield Wizard will launch.
2. Select the language to use. This is both the language of the installer and the language that GENESYS will be set to use.

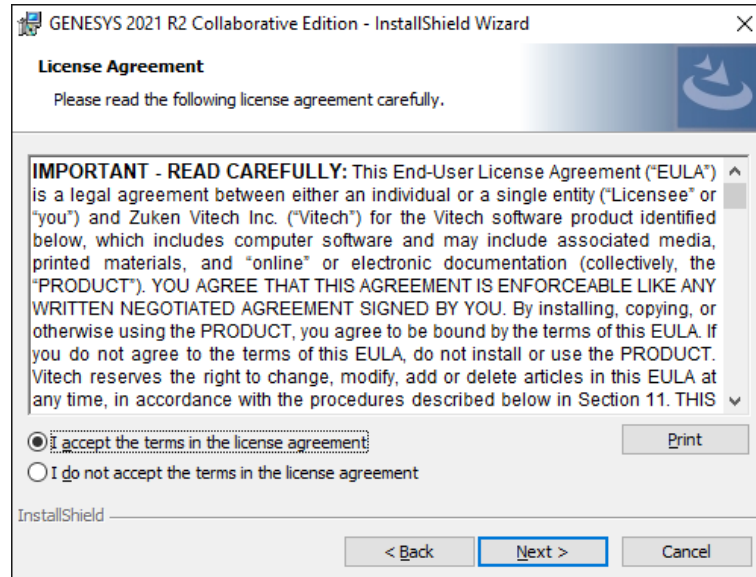


3. A welcome screen is shown with the software information shown. Click **Next** to continue.

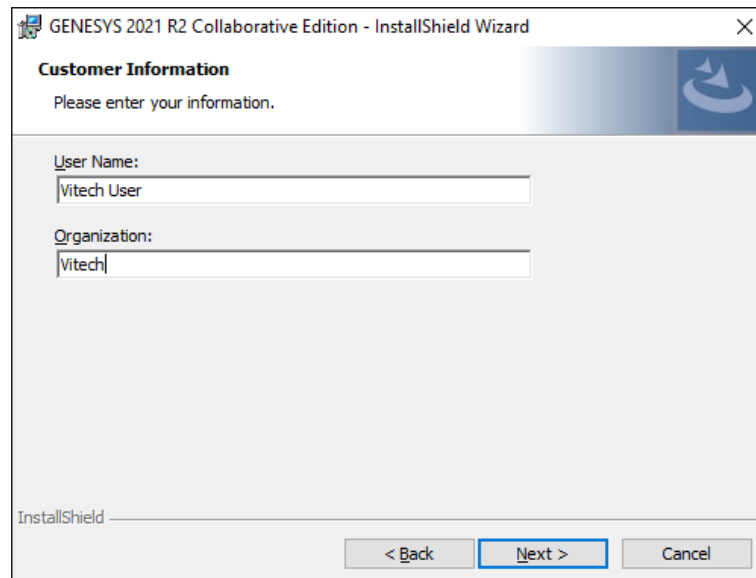


Installation Guide

4. Review the end-user license agreement which governs the use of GENESYS.
 - If you accept the terms of the license agreement, click the radio button next to “*I accept...*” and then click **Next** to proceed with the installation.
 - Or, if you do not accept the terms of the license agreement, click **Cancel** to end the installation.

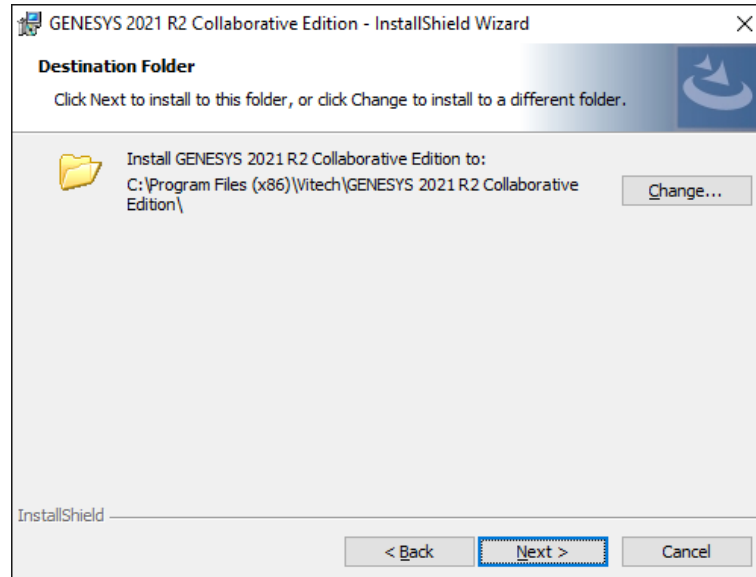


5. Optionally, type your name in the User Name field and type your organization's name in the Organization field. Click **Next**.

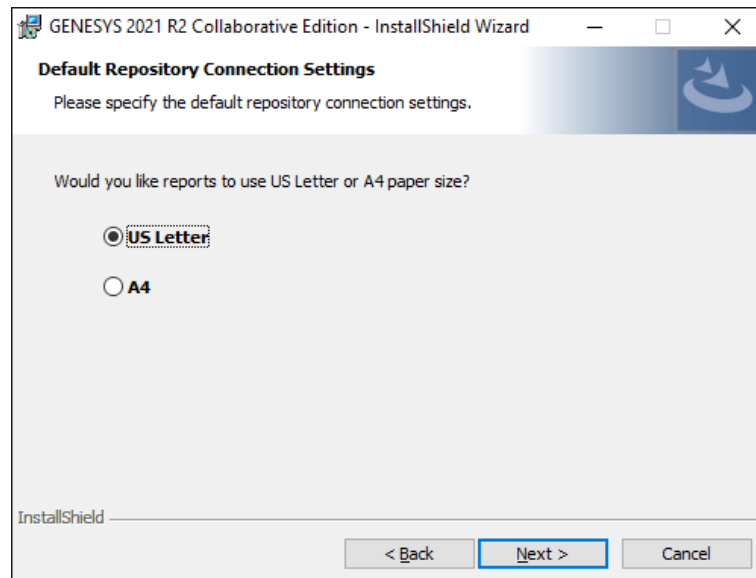


Installation Guide

6. The installation wizard prompts you for the location to install GENESYS Collaborative Edition. By default, Windows applications are installed to the program files directory. You can either:
- Confirm the location and click **Next**.
 - Or, click **Change** to select a different installation location; then click **Next** after selecting the alternate location.

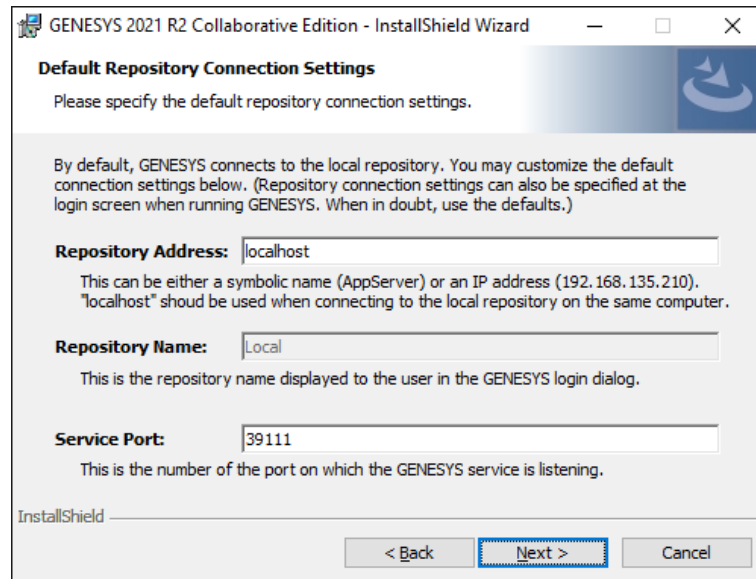


7. GENESYS reports can be configured to use either US Letter or A4 paper. Select the appropriate paper size and click **Next**.



Installation Guide

8. GENESYS can either connect locally (Localhost) or to another repository. Enter the information if connecting to a remote repository instead of the local repository.



The screenshot shows the 'Default Repository Connection Settings' window of the GENESYS 2021 R2 Collaborative Edition - InstallShield Wizard. The window has a title bar with the application name and standard Windows window controls. The main content area includes a header with the title and a sub-header 'Please specify the default repository connection settings.' Below this is a paragraph explaining the default settings and how to customize them. There are three input fields: 'Repository Address' with the value 'localhost', 'Repository Name' with the value 'Local', and 'Service Port' with the value '39111'. Each field has a descriptive text block below it. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted with a blue border.

Default Repository Connection Settings
Please specify the default repository connection settings.

By default, GENESYS connects to the local repository. You may customize the default connection settings below. (Repository connection settings can also be specified at the login screen when running GENESYS. When in doubt, use the defaults.)

Repository Address: localhost
This can be either a symbolic name (AppServer) or an IP address (192.168.135.210). "localhost" should be used when connecting to the local repository on the same computer.

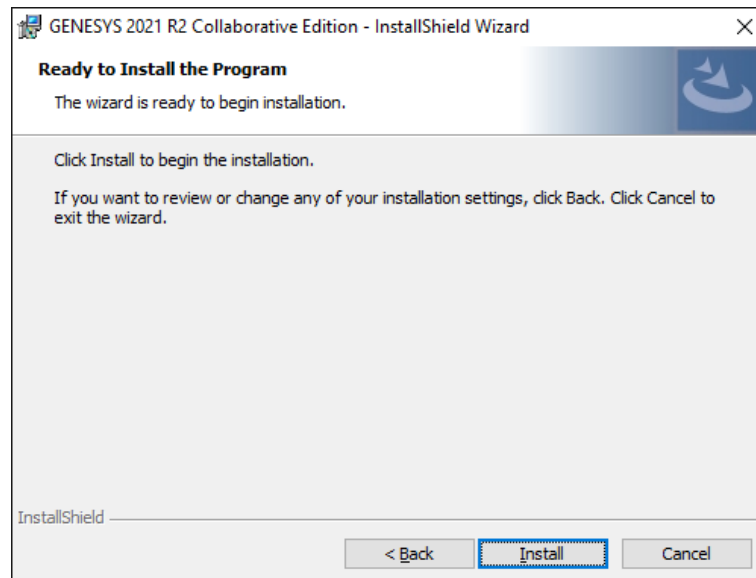
Repository Name: Local
This is the repository name displayed to the user in the GENESYS login dialog.

Service Port: 39111
This is the number of the port on which the GENESYS service is listening.

InstallShield

< Back Next > Cancel

9. Click **Install** to begin the installation or click **Back** to change settings.



The screenshot shows the 'Ready to Install the Program' window of the GENESYS 2021 R2 Collaborative Edition - InstallShield Wizard. The window has a title bar with the application name and standard Windows window controls. The main content area includes a header with the title and a sub-header 'The wizard is ready to begin installation.' Below this is a paragraph explaining the next steps. At the bottom, there are three buttons: '< Back', 'Install', and 'Cancel'. The 'Install' button is highlighted with a blue border.

Ready to Install the Program
The wizard is ready to begin installation.

Click Install to begin the installation.

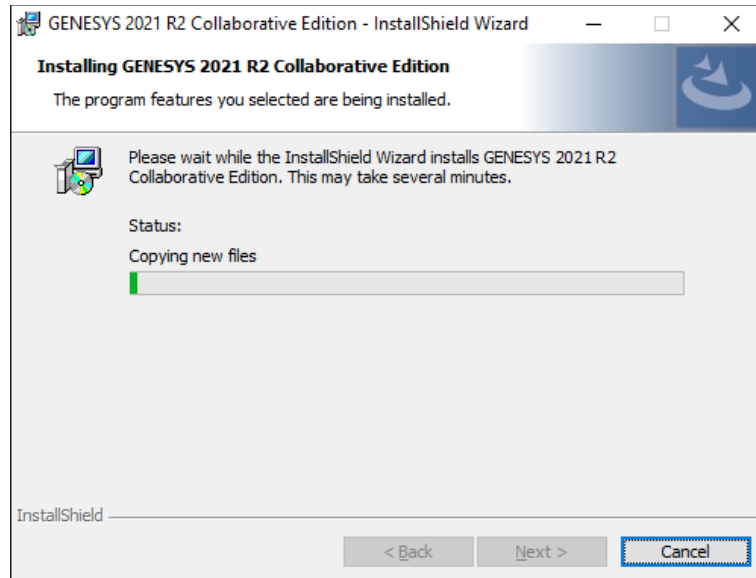
If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.

InstallShield

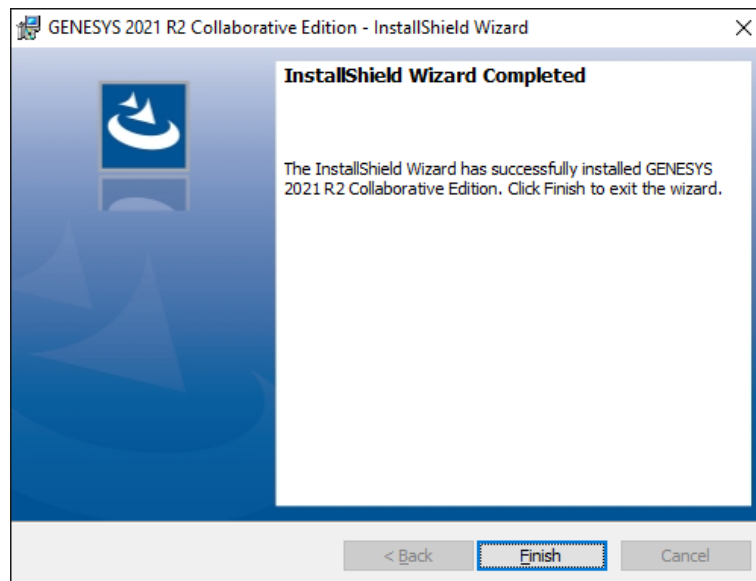
< Back Install Cancel

10. A progress meter will let you know what the installer is doing while it is working. Note that the installer will stop any other GENESYS services that are running on your computer in order for the Sentinel Hasp update to install. After installation it will be necessary for you to restart any GENESYS services that were stopped.

Installation Guide



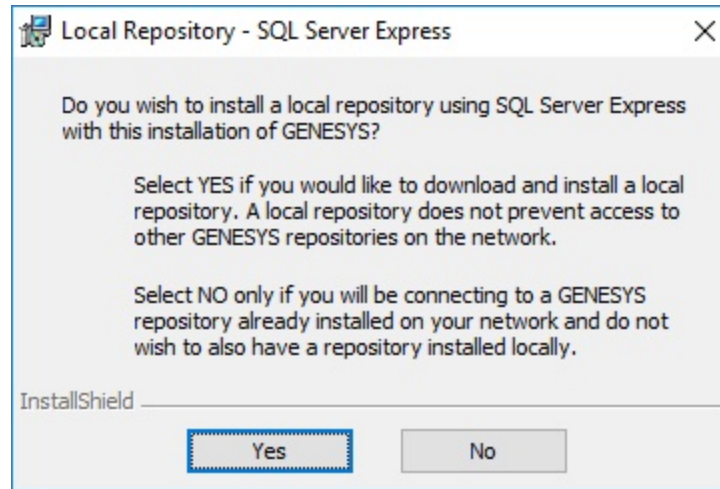
11. After the installation completes, click **Finish**.



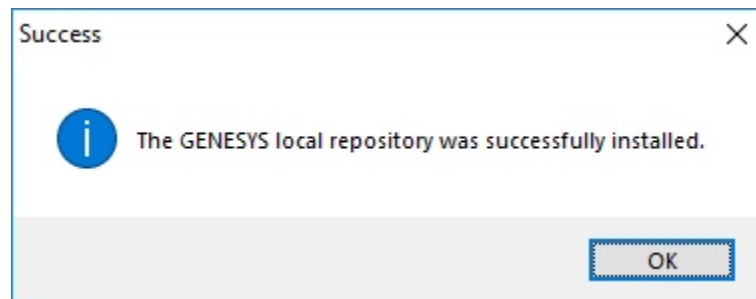
12. If SQL Server Express is not already installed on your computer, a prompt is shown asking if you want to install a local repository using SQL Server Express 2014 service pack 3.

- If you have an internet connection and would like to download and install a local repository, select **Yes**.
- If you do not have an internet connection and have downloaded the SQL Server Express 2014 installer, select **No**. Then run that installer next.
- If you do not want to download and install a local repository at this time, select **No**. If you decide later that you would prefer to have a local repository, click on the SQLServerBootstrap application in your GENESYS Collaborative Edition directory.

Installation Guide



13. Downloading and installing SQL Server Express will take some time. There will be various screens presented while this installation takes place. No action is necessary by the user. After the SQL database install is complete, click **OK**.



14. Reboot your machine for all installations to be completed.

Install Desired Connectors

Also available are installers for some of the GENESYS connectors. These connectors need to be installed on the workstation where they will be used.

The following connector installers are available:

- Microsoft® Excel®
- Microsoft® PowerPoint®
- Microsoft® Project®

The following connectors are included within GENESYS and require no additional installation:

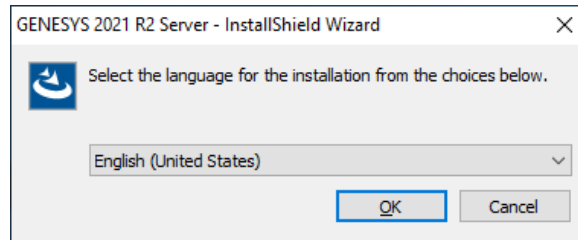
- IBM® Rational® DOORS®
- MathWorks® MATLAB®
- MathWorks® Simulink®
- ModelCenter® MBSE

Installation Guide

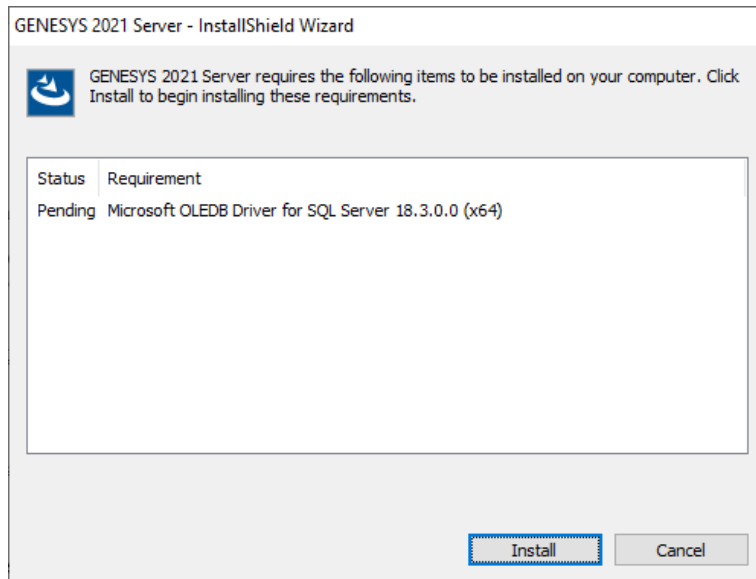
Installing GENESYS Server

Note: GENESYS Server will connect to a SQL Server. Before installing your GENESYS Server, please ensure that your SQL Server installation is complete and the version is 11.0.7001.0 or later. Also, ensure that you have a username and password prepared to log in to the SQL Server to create the database as well as a username and password prepared for updating the SQL repository during use. These may be the same username and password depending on your individual setup

1. Download the GENESYS 2021 R2 Server installer from the Vitech website and open the file. The InstallShield Wizard will launch.
2. Select the language to use. This is both the language of the installer and the language that GENESYS will be set to use. Click **OK**.

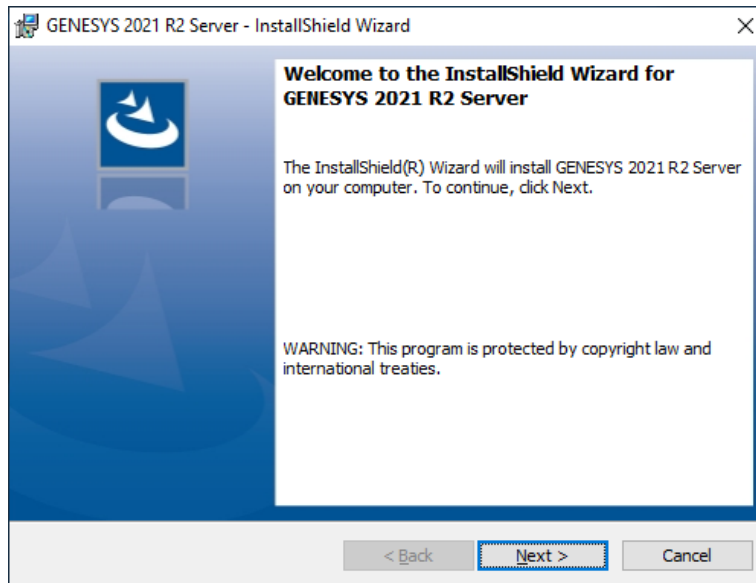


3. If the installer detects that the OLEDB Driver for SQL Server is not present, the installer will prompt to install it. If you already have this driver installed then this step is skipped.
 - If you want to install the driver and continue, click **Install**.
 - If you do not want to install the driver, click **Cancel** to end the installation.

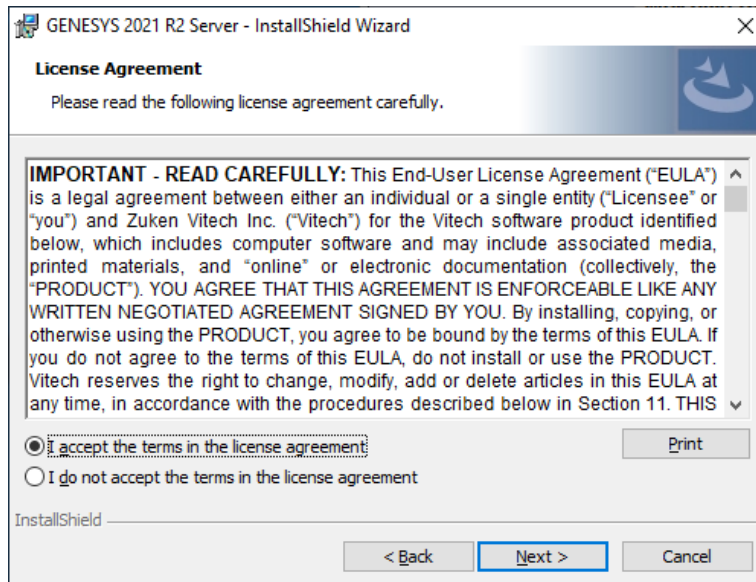


Installation Guide

4. In the InstallShield Wizard window, click **Next**.

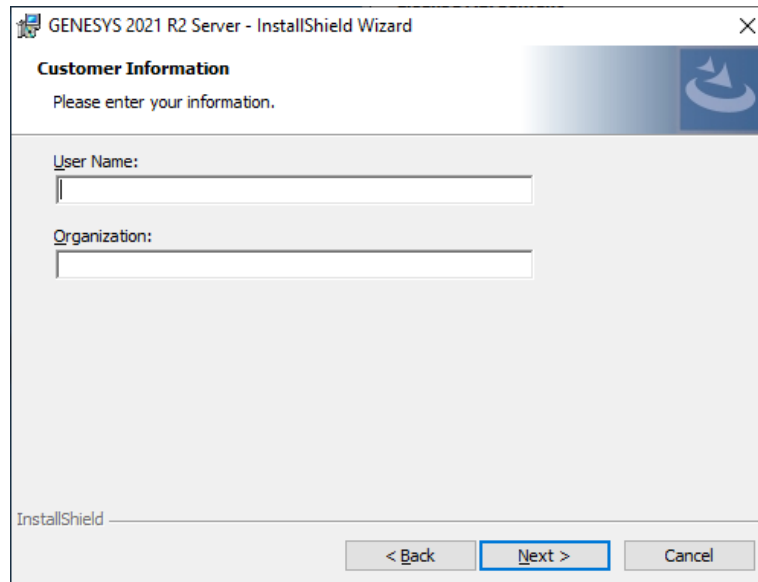


5. Review the end-user license agreement which governs the use of GENESYS.
 - If you accept the terms of the license agreement, click the radio button next to “**Yes**” and then proceed with the installation
 - Or, if you do not accept the terms of the license agreement, click **No** to end the installation.



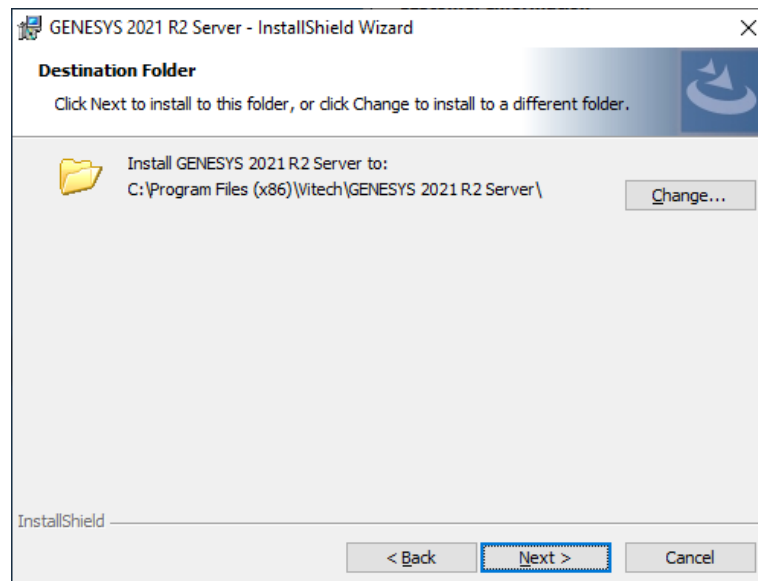
Installation Guide

6. Type your name in the Username field and your organization's name in the Organization field. Click **Next**.



The screenshot shows the 'Customer Information' window of the GENESYS 2021 R2 Server - InstallShield Wizard. The window has a title bar with the text 'GENESYS 2021 R2 Server - InstallShield Wizard' and a close button. Below the title bar is a header area with the text 'Customer Information' and a sub-header 'Please enter your information.' To the right of the header is a blue button with a circular arrow icon. The main area contains two text input fields: 'User Name:' and 'Organization:'. At the bottom of the window, there is a status bar with the text 'InstallShield' and three buttons: '< Back', 'Next >', and 'Cancel'.

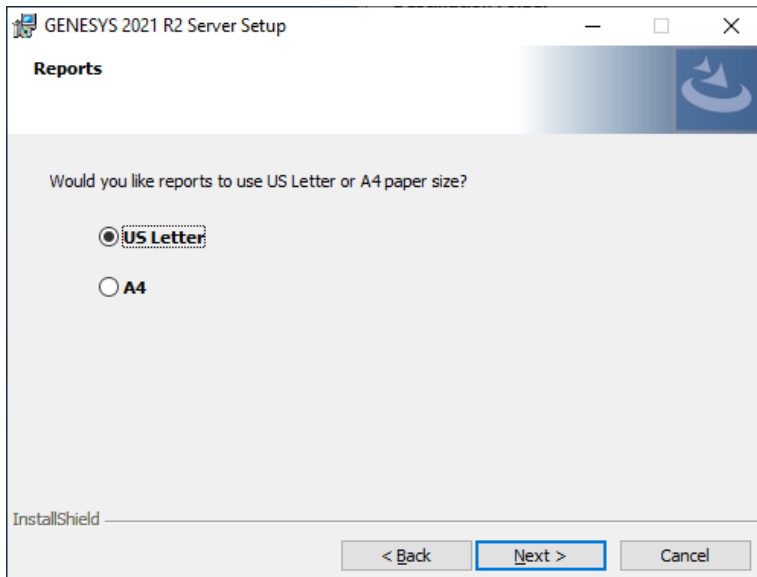
7. The installation wizard prompts you for the location to install the GENESYS Server application files. You can either:
 - Confirm the location and click **Next**.
 - Or, click **Change** to select a different installation location; then click **Next** after selecting the alternate location.



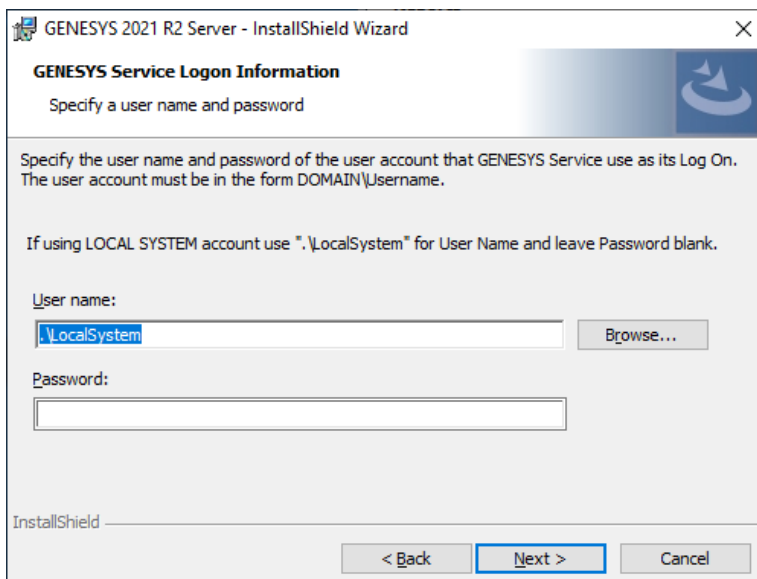
The screenshot shows the 'Destination Folder' window of the GENESYS 2021 R2 Server - InstallShield Wizard. The window has a title bar with the text 'GENESYS 2021 R2 Server - InstallShield Wizard' and a close button. Below the title bar is a header area with the text 'Destination Folder' and a sub-header 'Click Next to install to this folder, or click Change to install to a different folder.' To the right of the header is a blue button with a circular arrow icon. The main area contains a folder icon and the text 'Install GENESYS 2021 R2 Server to: C:\Program Files (x86)\Vitech\GENESYS 2021 R2 Server\'. To the right of this text is a 'Change...' button. At the bottom of the window, there is a status bar with the text 'InstallShield' and three buttons: '< Back', 'Next >', and 'Cancel'.

Installation Guide

8. GENESYS reports can be configured to use either US Letter or A4 paper. Select the appropriate paper size and click **Next**.



9. The installation wizard prompts you for the username and password of the user account that will run the GENESYS Server service and may be used – if using Windows authentication in the next screen – to connect to the SQL Server database. To use the Local System account when the SQL Server is installed on the same machine enter ".\LocalSystem". (If you use ".\LocalSystem" you do not need a password.) Type your SQL Server username in the Username field in the domain\username format or select **Browse** to choose from available domains and usernames. Type your password in the Password field. Note that if Windows Authentication is in use with SQL Server, your account [the account which is running the installer] must have permission to create the database within the SQL Server instance that will be specified in the following step. Click **Next**.



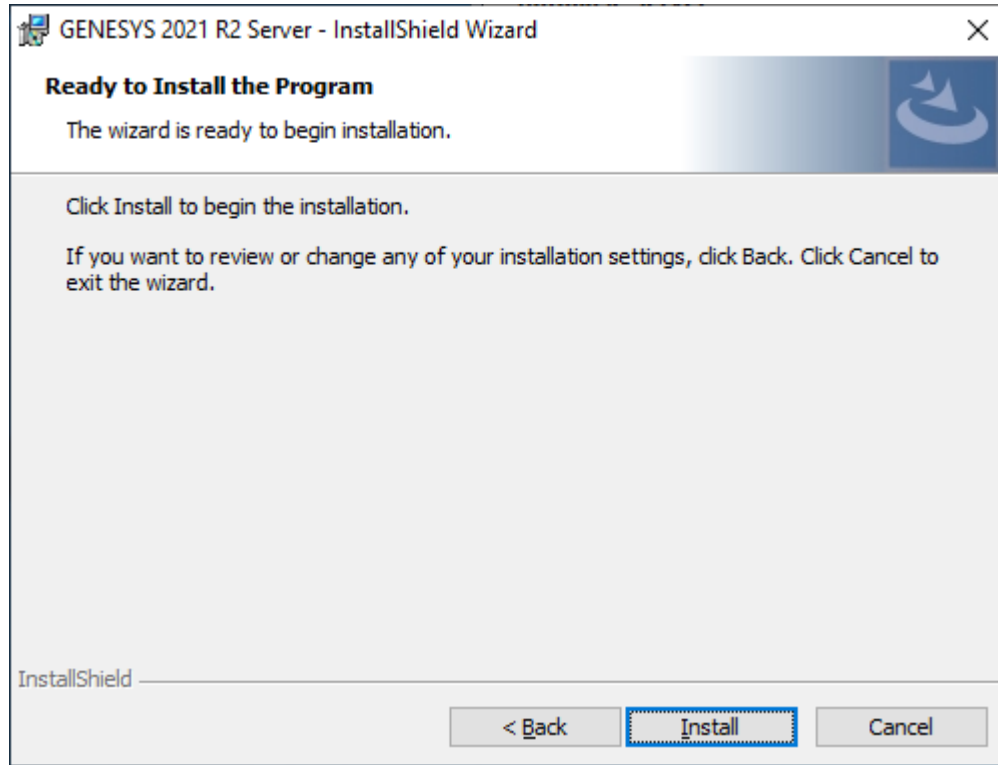
Installation Guide

10. The installation wizard prompts you for the location of your SQL Server and the authentication type being used.
- In the database server field, leave “(local)” if the SQL Server is on the same machine. Otherwise, select **Browse** then select the server and SQL Server instance hosting your Repository database. If the SQL Server is not listed, ensure that the SQL Server Browser service is enabled.
 - Select the authentication type being used and, if SQL Server authentication is specified, enter the credentials. If using SQL Server authentication, the user account specified will be used to create the database and access the database during application runtime. If using Windows authentication, your account [the account which is running the installer] is used for a one-time login to create the database within the SQL Server instance during installation and the logon information from Step 9 is used to interact with the SQL Server during application runtime. Note that the user account used during application runtime will need to have permission to create and delete tables for repository GENESYS2021R2 within SQL server (we recommend that dbowner permissions are used). Click **Next**.

The screenshot shows the 'Database Server' step of the 'GENESYS 2021 R2 Server - InstallShield Wizard'. The window title is 'GENESYS 2021 R2 Server - InstallShield Wizard'. The subtitle is 'Database Server' with the instruction 'Select database server and authentication method'. Below this, there is a section 'Database server that you are installing to:' with a dropdown menu showing '(local)' and a 'Browse...' button. Underneath, the 'Connect using:' section has two radio buttons: 'Windows authentication credentials of current user' (which is selected) and 'Server authentication using the Login ID and password below'. Below the second radio button are input fields for 'Login ID:' (containing 'sa') and 'Password:'. At the bottom of the wizard, there are three buttons: '< Back', 'Next >' (which is highlighted with a blue border), and 'Cancel'. The 'InstallShield' logo is visible in the bottom left corner of the window.

Installation Guide

11. Click **Install** to begin the installation or click **Back** to change settings.



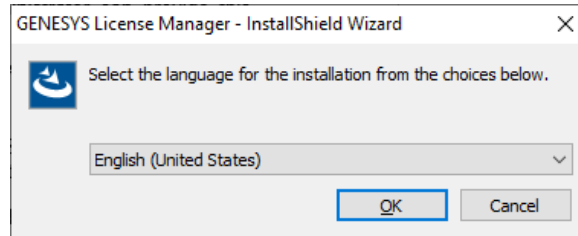
12. After the installation routine completes, click **Finish**.
13. Once the install completes, ensure that the user specified in step 9 has "dbowner" permissions on repository GENESYS2021R2.

Installation Guide

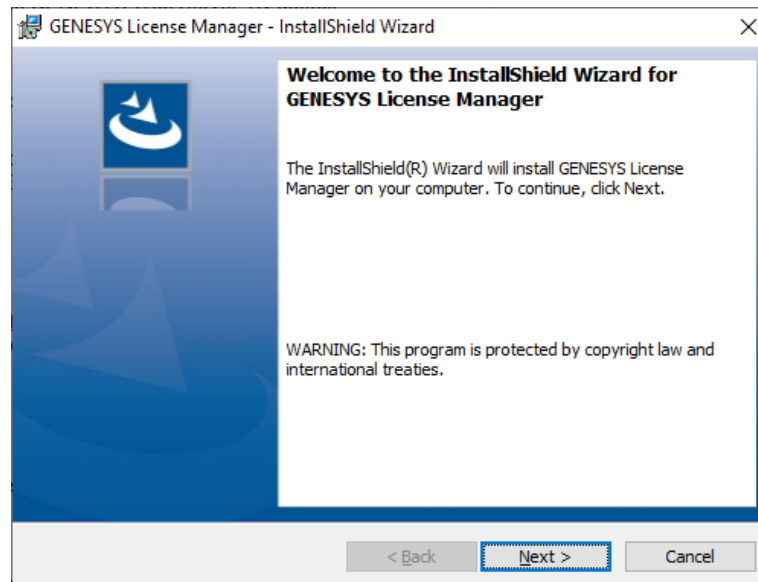
Installing GENESYS License Manager

Note: The licensing software is included with all GENESYS products. GENESYS License Manager need only be installed on a machine where no other GENESYS products will be installed. This is solely for the management of floating licenses.

1. Download the GENESYS License Manager installer from the Vitech website and open the file. The InstallShield Wizard will launch.
2. Select the language to use. This is both the language of the installer and the language that GENESYS will be set to use. Click **OK**.

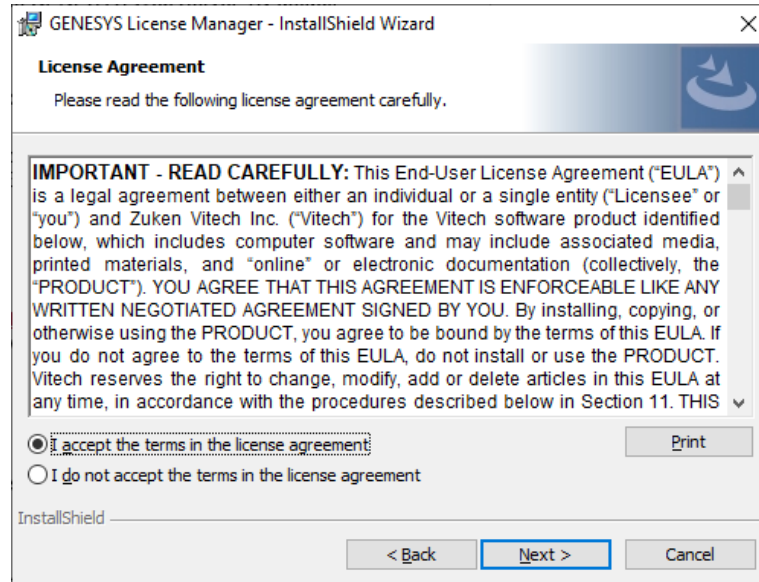


3. In the InstallShield Wizard window, click **Next**.

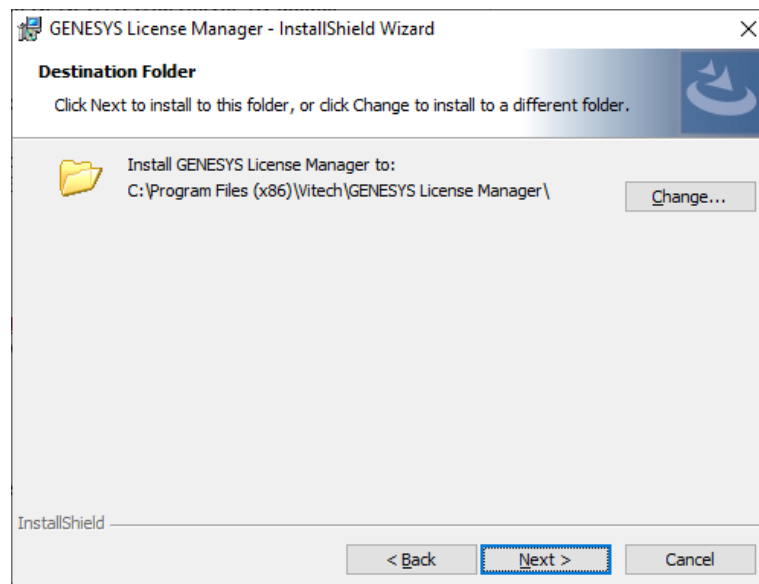


Installation Guide

4. Review the end-user license agreement which governs the use of GENESYS License Manager.
 - If you accept the terms of the license agreement, click the radio button next to “*I accept*” and then click **Next** to proceed with the installation.
 - Or, if you do not accept the terms of the license agreement, click **Cancel** to end the installation.

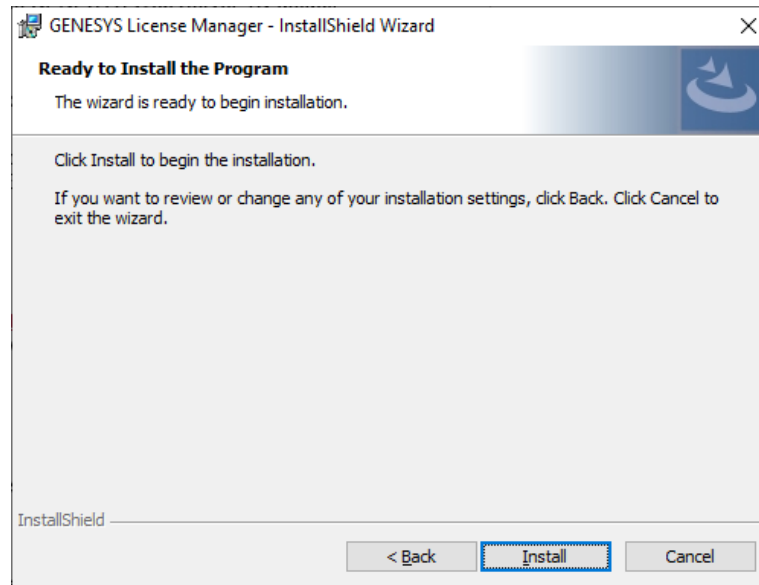


5. The installation wizard prompts you for the location to install the GENESYS License Manager application files. You can either:
 - Confirm the location and click **Next**.
 - Or, click **Change** to select a different installation location; then click **Next** after selecting the alternate location.

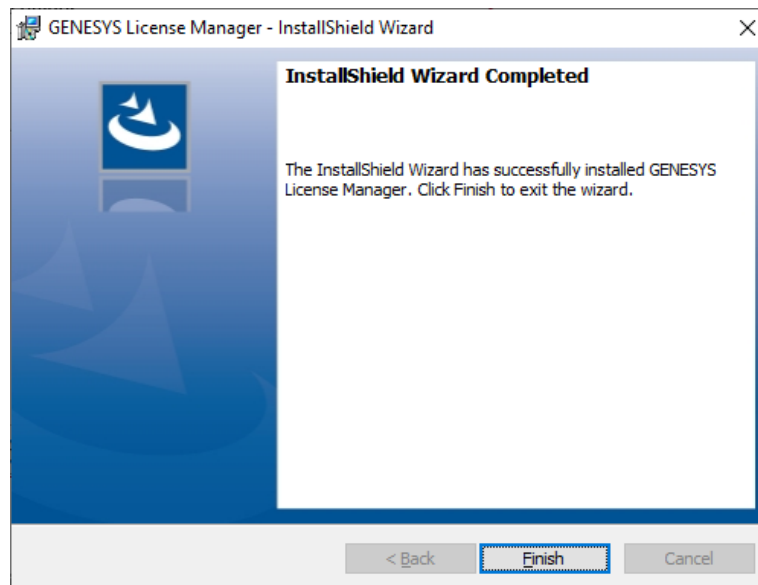


Installation Guide

- Click **Install** to begin the installation or click **Back** to change settings.



- After the installation routine completes, click **Finish**.



Configuring Microsoft Windows Firewall for GENESYS

If the Microsoft Windows Firewall is being used within your enterprise, you may need to create firewall exceptions.

GENESYS 2021 R2 Collaborative Edition

Firewall exceptions for GENESYS 2021 R2 Collaborative Edition are needed only when connecting to a repository on another machine. This is true for connections to another installation of GENESYS 2021 R2 Collaborative Edition as well as connections to GENESYS 2021 R2 Server.

Please note that all instructions below are for Windows 10 Firewall. If you are using a different version of Windows or another firewall program, your process may differ.

Create a new Inbound Rule to allow TCP port access.

1. Click **Start**, then type “*firewall*” and press **Enter**. The Windows Firewall window will open.
2. Select **Advanced settings**.
3. In the left-hand pane, click **Inbound Rules**.
4. In the Actions pane (on the right) click **New Rule**. The New Inbound Rule Wizard will open.
5. Select **Port**, and then click **Next**.
6. Select **TCP**.
7. Specify port number “39111.” (Note: Port 39111 is the default port used by GENESYS for remote repository communication. If you changed this default, you must use the changed port number here.)
8. Click **Next**.
9. Select **Allow the connection**, then click **Next**.
10. Select the network profile to which you would like this rule to apply. (If you are unsure which to select, please contact your IT organization.)
11. Click **Next**.
12. In the Name field, enter “GENESYS 2021 R2 Repository Communication,” then click **Finish**.

If you are using a network-enabled license and are having trouble accessing your license through your network, you may need the following firewall exception on the computer that hosts the license.

1. Click **Start**, then type “*firewall*” and press **Enter**. The Windows Firewall window will open.
2. Select **Advanced settings**.
3. In the left-hand pane, click **Inbound Rules**.
4. In the Actions pane (on the right) click **New Rule**. The New Inbound Rule Wizard will open.
5. Select **Program**, and then click **Next**.
6. Click **Browse**.
7. Navigate to the **C:\Program Files (x86)\Common Files\Aladdin Shared\HASP** folder and select the **hasplms.exe** file.
8. Click **Open**, then click **Next**.
9. Select **Allow the connection**, then click **Next**.
10. Select the network profile to which you would like this rule to apply. (If you are unsure which to select, please contact your IT organization.)
11. Click **Next**.
12. In the Name field, enter “Sentinel LM,” then click **Finish**.

STEP 2: LICENSING GENESYS PRODUCTS

For specific information about the licensing types, refer to GENESYS Licensing Options. If you have any questions or need assistance at any point throughout this process, please contact Vitech Customer Support at +1 540.951.3999 or support@vitechcorp.com.

General Instructions for Activating a GENESYS License

1. Install GENESYS.
2. Upon first launch, you will be prompted to complete the Product Activation.
3. Select the appropriate Licensing Mode:
 - a. Select "Use a local license" if the license is on the machine where GENESYS is installed
 - b. Select "Use a network license" if the license resides on a different
4. Click **Next**.

NOTE: If you are connecting to a license on your network and not activating a new license, once you select **Use a network license** the wizard will complete.

Product License Activation

Product requires activation. Please select licensing options.

Activation Wizard
Step 1 of 5

Select Licensing Mode

This machine does not have an activated license. If your organization uses networked licenses, select the 'Use a Network License' option below, otherwise select the 'Use a Local License' option.

☒ Use a local license.
☐ Use a network license.

Cancel << Back Next >>

5. Copy and Paste the Product Key provided by Vitech into the blank field and click **Next**.

Product License Activation

Product requires activation. Please select licensing options.

Activation Wizard
Step 2 of 5

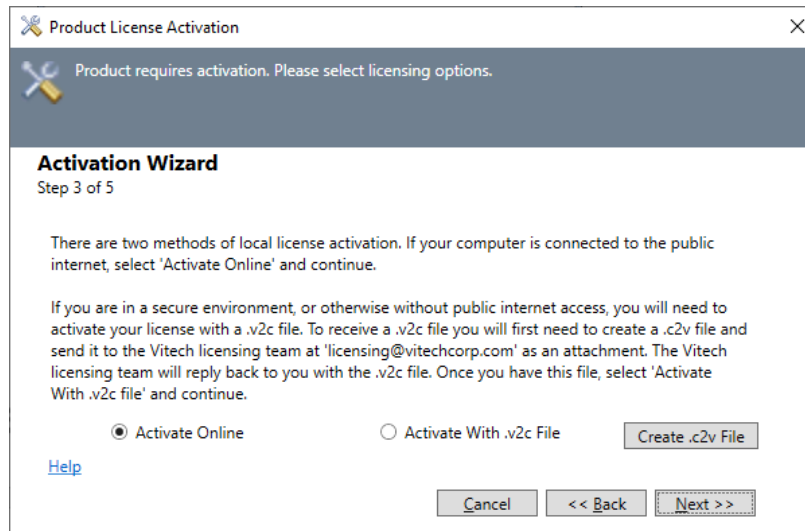
Please enter the product key you received from Vitech for this product.

Product Key:

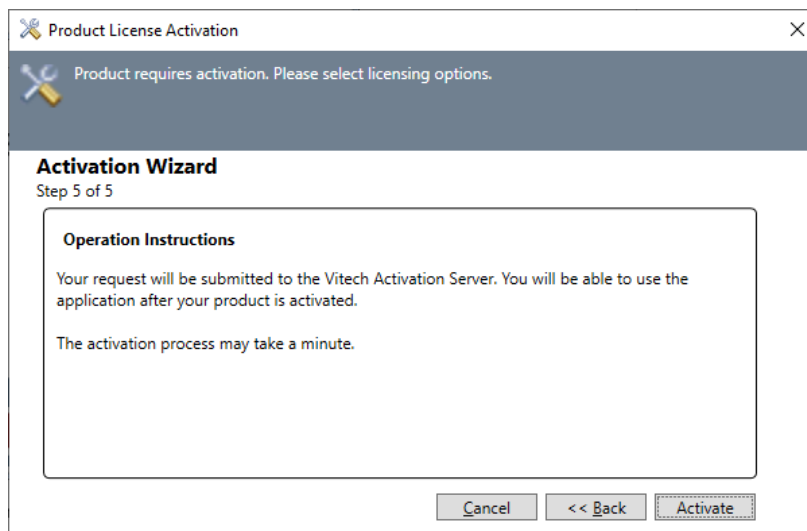
Cancel << Back Next >>

Installation Guide

6. Select your activation method as defined in your Welcome Letter. (Most activations use a product key.) Click **Next**.



7. Click **Activate** to apply the Product Key.



8. You should receive a confirmation message that the software has been activated successfully.

If the machine is not connected to the internet or if the activation is not successful, restart GENESYS to restart the activation wizard. In Step 4, click on the "Create .c2v file" button. Save the file and send it to licensing@vitechcorp.com along with the product key you used and ask for a manual activation.

STEP 3: GETTING STARTED WITH GENESYS 2021 R2

This section describes the basic steps required to launch GENESYS and log in.

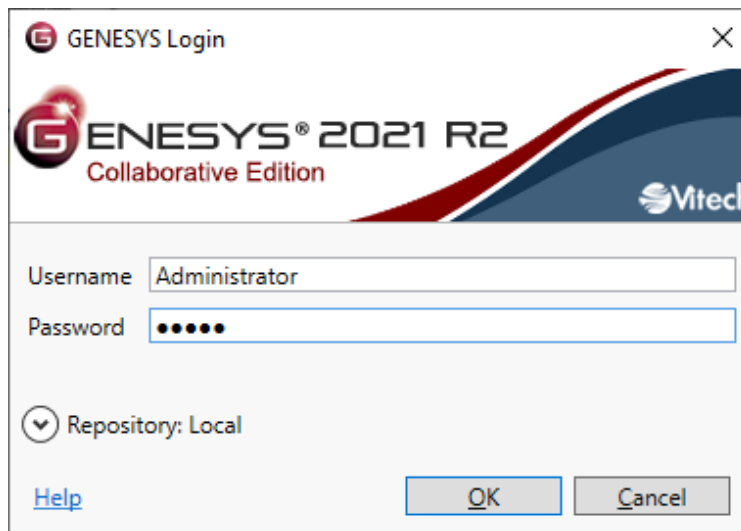
Logging in to a Local Repository

The installation program creates a new program group entry on the start menu with the title "GENESYS 2021 R2 Collaborative Edition." It contains an entry labeled "GENESYS 2021 R2 Collaborative Edition." Simply click on this menu item.

Note: If the Microsoft Windows Firewall is being used and you are using a network-capable license, a firewall window will appear when you start GENESYS for the first time. Windows Firewall will ask you to choose to either block or unblock. Select **Unblock**. The GENESYS Login window will then appear.

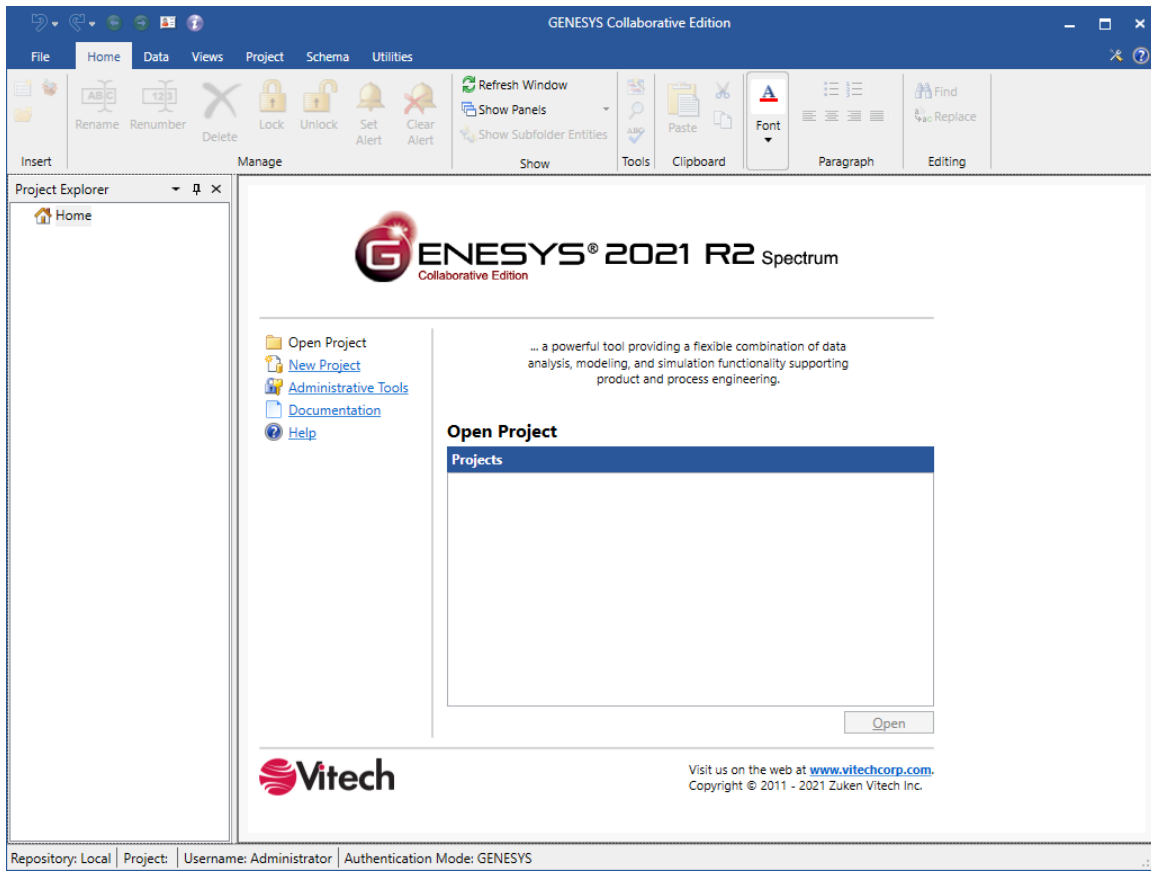
The GENESYS Login window shown below will open. GENESYS is configured with one initial user account—the Administrator account. The username and password are case sensitive. Log in as shown below:

Username: Administrator
Password: admin




By default, GENESYS will access the repository located on the local machine. If you would like to access a repository on another machine, please reference the next section (Logging into a Remote Repository).

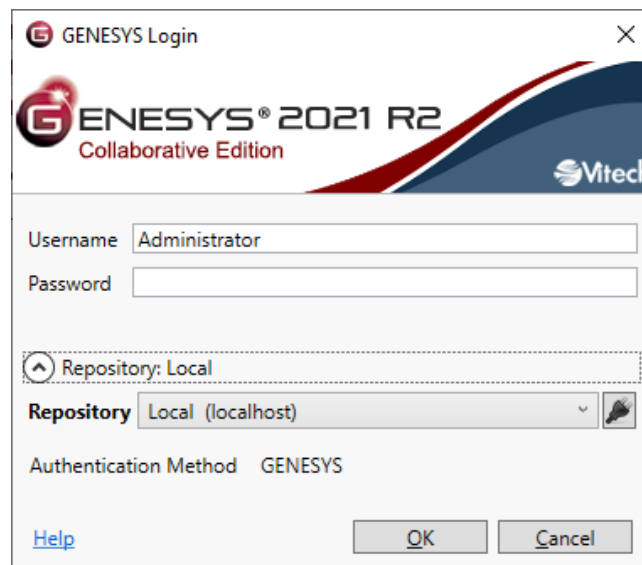
Installation Guide



After logging in, new user accounts can be created and passwords may be changed via the User/Group Tool accessible via the Administrative Tools link.

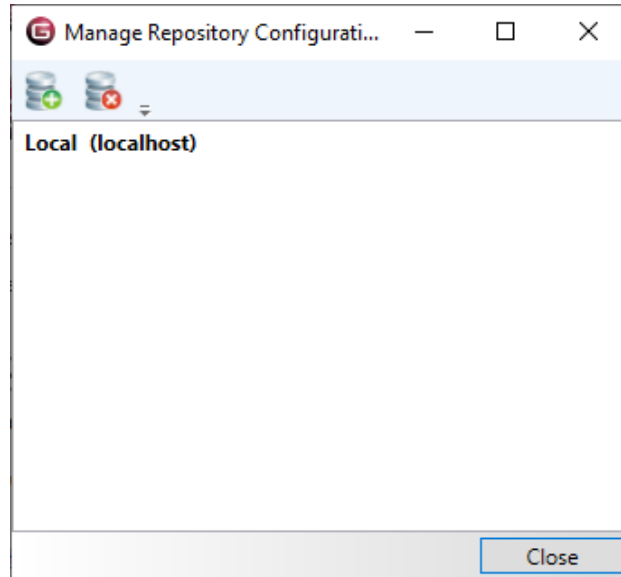
Logging in to a Remote Repository

On the GENESYS Collaborative Edition login screen, click the **Arrow** next to Repository. This will reveal the Repository selection field. Click the **Plug** icon  to add a repository.



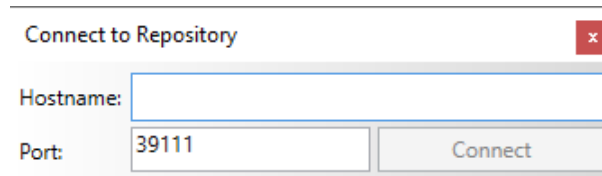
Installation Guide

Click the **Add Repository**  icon.



Enter the machine name where the repository is hosted. This may be another instance of GENESYS 2021 R2 Collaborative Edition or a GENESYS 2021 R2 Server.

Leave the Port designation as the default unless you are certain that this setting was changed.



Click **Connect**, then **Close**. You can then select that repository from the drop-down list.

Special Considerations for Previous Version Users

Installing GENESYS 2021 R2

GENESYS 2021 R2 products will install side-by-side with previous GENESYS versions.

Upgrading SQL Server

GENESYS Collaborative Edition versions prior to 2020 required SQL Server Express 2008 R2 or later. Starting with GENESYS 2020, GENESYS Collaborative Edition requires SQL Server Express 2012 or later for some of its new capabilities. If an older version of SQL Server Express is installed on your machine, GENESYS will attempt to upgrade the installation. If the installer is unable to complete the upgrade, the user is notified that the upgrade will have to be done manually before running the GENESYS installer. The SQL Server Express 2012 installer can be found on our website under Software > GENESYS 2021 R2 Collaborative Edition.

Moving your data

A simple migration utility has been built into GENESYS. This utility will upgrade your schema to the latest version. (Details of the schema changes can be found in the Appendix.) The steps below will move both your data and your Users and Groups.

To migrate your data:

1. Log into your current version of GENESYS.
2. Export your project to GNSX format, using the *Project Backup* option.
3. If you want to preserve your user preference settings, export *Users and Groups* option. If you do not want your user preferences, exporting the Project Backup will create the users with default preferences in GENESYS 2021 R2.
4. Log out of the previous version of GENESYS.
5. Log in to GENESYS 2021 R2.
6. Import the Users and Group export if you exported it.
7. Import the project GNSX file, allowing the import wizard to create the new projects for you. While doing this, add *old* to the beginning of the project name. This will help you in a later step.
8. Select the **Project** tab on the ribbon, then click **Migrate Schema**.
9. The Schema Migration Wizard will open.
10. This utility makes a copy of the project with the new schema, so in most cases you will want to let the wizard create a new project. Select *Create New Project*, set the project name as desired, and click **Migrate**.
11. The Job Monitor Dialog will open and alert you when the migration is complete.
12. When complete, examine the Job Monitor Dialog to see if conflicts were reported. Examine the conflict log if one is available.
13. A new project has been created using the name you specified in Step 10. Review this project.
14. When you are satisfied with the results, close, then delete the project you named in Step 7.
15. Upon first login, a user's password will expire. The user must change their password in order to proceed.

FIPS 140 Compliance

Starting in GENESYS 4.0, GENESYS accounts can now be used in an environment which has FIPS 140 enforcement enabled. GENESYS 3.0 users who previously could not have FIPS 140 enforcement enabled in the operating system may now do so. Further, passwords from GENESYS 3.0 do not meet the compliance standards for FIPS 140. If you wish to import your GENESYS 3.0 accounts to GENESYS 4.0 or later versions, the Administrator must reset the passwords after import.

ADDITIONAL TIPS

The sections below provide useful information to support your use of GENESYS.

Check for Latest Service Packs

Periodically Vitech provides service packs to upgrade the GENESYS product suite. Please check to ensure that you have the latest service pack by visiting the Software page at <https://www.vitechcorp.com/software-downloads/>.

GENESYS Training

Vitech offers ongoing training to help users learn more about using GENESYS in support of systems engineering and architecture frameworks including:

- **Model-Based Systems Engineering with GENESYS** — You will learn the interfaces of GENESYS and how to best apply it to the management of system design. You will learn how the GENESYS .NET interface and capability allows you to intuitively create robust system models. You will build complete design models using the designer-friendly user interface.
- **Fundamentals of Writing Reports in GENESYS** — You will learn the intuitive and user-friendly reporting capability of the new GENESYS tool. You will craft custom reports from “scratch” as well as through basic templates. Your reports, created through GENESYS’ Visual Basic .NET reporting tools, will say what YOU need to say about YOUR models. This course shows you the way.

GENESYS Help and Documentation

The GENESYS user reference guide is accessible within GENESYS using the Help icon in the upper-right-hand corner. If you prefer to navigate by volume, flip through the index, or simply perform an electronic search, the help tool will meet your needs.

Sample Solutions

The Samples directory within your GENESYS installation provides three sample projects. These files can be imported into GENESYS to view and manipulate.

You will also find two API Samples to demonstrate the use of the GENESYS API.

Using Data from CORE™

GENESYS supports the import of CORE 9 files in the xml format using the standard import dialog. If you have data from previous versions of CORE that you would like to import into GENESYS, you must first use CORE to upgrade that data to the CORE 9 schema. Please note that the CORE 9 projects will import into projects using the v40 schema by default. From here, you should migrate your projects if you want to use later schemas.

If you need assistance migrating data to the CORE 9 schema, please contact our Customer Support Team.

Working with Report Files from CORE

While the GENESYS reporting framework brings a level of simplicity in drag-drop reporting, it is not capable of running reports created in CORE. Our Professional Services team is available to discuss your need for custom reports and the process of recreating CORE reports in GENESYS.

Disaster Prevention/Recovery

In GENESYS Collaborative Edition, your data is maintained by SQL Server Express. It is recommended that you use your organization’s file backup system to create copies of your data and archive them on another machine. You will need to back up the entire contents of the \ProgramData\Vitech\GENESYS 2021 R2 Collaborative Edition\Data folder.

Installation Guide

Should you have complete failure of the machine on which you have GENESYS Collaborative Edition installed and have backup files available, follow these steps to restore your data:

1. Install GENESYS Collaborative Edition on the desired machine.
2. Stop the following services in the order listed:
 - a. "GENESYS 2021 R2 Collaborative Edition Services Host" (Genesys2021R2CollaborativeSvc),
 - b. "SQL Server (GENESYSCOLLAB)" (MSSQL\$GENESYSCOLLAB).
3. Locate the archived files and save them to the C:\ProgramData\Vitech\GENESYS 2021 R2 Collaborative Edition\Data, overwriting the blank files currently in that folder.
4. Start the following services in the order listed:
 - a. "SQL Server (GENESYSCOLLAB)" (MSSQL\$GENESYSCOLLAB)",
 - b. "GENESYS 2021 R2 Collaborative Edition Services Host" (Genesys2021R2CollaborativeSvc).

GENESYS Server Backup/Data Recovery

Data in a GENESYS Server is maintained by SQL Server. You should follow Microsoft's recommendations for backup and recovery of SQL Server.

Uninstalling GENESYS

To remove GENESYS from your system, select **Add/Remove Programs** from the Windows control panel. Select the GENESYS product from the list of applications available to uninstall and click the **Add/Remove** button. Follow the instructions provided by the installer to remove the application.

Please note that this will not remove the repository itself as GENESYS repositories are maintained by either SQL Server Express or SQL Server. These must be removed separately.

NOTE: If you are uninstalling GENESYS with the intention of moving your license to another machine, please contact Vitech Customer Support for assistance.

Reporting Problems / Making Product Suggestions

All customer observations and recommendations are valuable to us. If you should encounter a problem with the software (either an error, a deficiency, a feature that works in a manner other than you expected, or a problem with any associated documentation), please notify us via e-mail, phone, or fax as indicated below. Any information you can provide in your report regarding the hardware and software configuration of the host machine, the circumstances in which the problem occurred, conditions to reproduce the problem, and such test data as you can reasonably provide to assist Vitech in reproducing the problem would be greatly appreciated.

We hope that you enjoy the new capabilities of GENESYS 2021 R2.

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APPENDIX

Prerequisites for Installation

GENESYS 2021 R2 Collaborative Edition requires that the Microsoft .NET Framework 4.6 be installed on the computer. This must be installed before running the GENESYS 2021 R2 Collaborative Edition installer.

Most computers will already have this prerequisite installed. If you do not have this installer and run the GENESYS 2021 R2 Collaborative Edition installer, you will be prompted with an alert of the need to install the prerequisite.

In this situation, if your computer has internet access, our installer will obtain the installer for you. If you do not have internet access on this computer, you'll need to retrieve the installer from another computer and install it separately.

Should you need to obtain and install Microsoft .NET Framework 4.6, you can access the installer and installation instructions here: <http://www.microsoft.com/en-us/download/details.aspx?id=17718>.



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