



Installation Guide



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Getting Started

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

1. installing the software,
2. activating a GENESYS license, and
3. 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

For licensing questions
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
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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 model-based systems engineering (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 and 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, 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 Web Server

GENESYS Web Server extends your GENESYS Server environment to the web. As a separately licensed component of the GENESYS Server, GENESYS Web Server provides a robust web interface to your GENESYS project data. Leveraging a standard IIS architecture, the web server provides controlled access to your systems model through standard internet browsers.

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 HASP 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”, 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 — The HASP License Manager can host a pool of licenses on one machine and make these licenses available to any GENESYS installation on the same network. Users log into GENESYS, and GENESYS checks the network license to see if there are tokens (licenses) available. A network capable license is the most flexible licensing approach, allowing you to seamlessly share licenses across your network.

USB License Key — The license file resides on a USB drive 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: GENESYS 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

1. Download the GENESYS Collaborative Edition installer from the Vitech website and open the file. The InstallShield Wizard will launch.
 2. In the InstallShield Wizard window, click **Install**.
 3. The installation will now run. This will take some time as the GENESYS Collaborative Edition installer also installs Microsoft's SQL Server Express.
 4. When prompted, click **Yes** to reboot the computer.
 5. After rebooting, you may see a Security Warning, click **Run**.
 6. In the InstallShield Wizard window, click **Next**.
 7. 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.
8. Type your name in the User Name field. Type your organization's name in the Organization field. Click **Next**.
 9. The installation wizard prompts you for the location to install GENESYS. 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.
10. Click **Install** to begin the installation or click **Back** to change settings.
 11. After the installation routine completes, click **Finish**.

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 10.50.1600 or later. Also ensure that you have a user name and password prepared to use to log into the SQL Server.

1. Download the GENESYS Server installer from the Vitech website and open the file. The InstallShield Wizard will launch.
2. In the InstallShield Wizard window, click **Next**.
3. 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.
4. Type your name in the User Name field. Type your organization’s name in the Organization field. Click **Next**.
5. 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.
6. The installation wizard prompts you for the user name and password of the user account that will be used to access the SQL Server. This login will run the GENESYS Server service and is used by the service to connect to the SQL Server database. Use “.\LocalSystem” when the SQL Server is installed on the same machine. (If you use “.\LocalSystem” you do not need a password.) Type your SQL Server user name in the User Name field in the domain\user name format. Type your password in the Password field or select **Browse** to choose from available domains and user names. Click **Next**.
7. The installation wizard prompts you for the location of your SQL Server. In the database server field, leave (local) if the SQL Server is on the same machine. Otherwise, select **Browse** and select machineName\MSSQLENTERPRISE.
8. Select authentication type and enter your credentials if using Server authentication. The selection is used for a one time login to the SQL server during installation. Leave the Name of Database Catalog field blank. Click **Next**.
9. Click **Install** to begin the installation or click **Back** to change settings.
10. After the installation routine completes, click **Finish**.

Installing GENESYS Web Server

Note: GENESYS Web Server requires that you have the same version and service pack level of GENESYS Server. IIS version (4.0 or higher) and asp.net are also required to be running.

1. Download the GENESYS Web Server installer from the Vitech website and open the file. The InstallShield Wizard will launch.
 2. In the InstallShield Wizard window, click **Next**.
 3. Review the end-user license agreement which governs the use of GENESYS Web Server.
 - 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.
4. Type your name in the User Name field.
 5. Type your organization's name in the Organization field. Click **Next**.
 6. The installation wizard prompts you for the location to install the GENESYS Web Server. By default, GENESYS Web Server is installed at the root of the drive. 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. Enter the name (for example, AppServer) or IP address (for example, 192.168.135.210) of the machine running the GENESYS Server. Your local GENESYS administrator can provide this information.
 8. Click **Install** to begin the installation or click **Back** to change settings.

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 Collaborative Edition

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

Please note that all instructions below are for Windows 7 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 with Advanced Security window will open.
2. In the left hand pane, click **Inbound Rules**.
3. In the Actions pane (on the right) click **New Rule**. The New Inbound Rule Wizard will open.
4. Select **Port**, and then click **Next**.
5. Select **TCP**.
6. Specify port number *38101*. (Note: Port 38101 is the default port used by GENESYS for remote repository communication. If you changed this default, you must use the changed port number here.)
7. Click **Next**.
8. Select **Allow the connection**, then click **Next**.
9. 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.)
10. Click **Next**.
11. In the Name field, enter *GENESYS Repository Communication*, and 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.

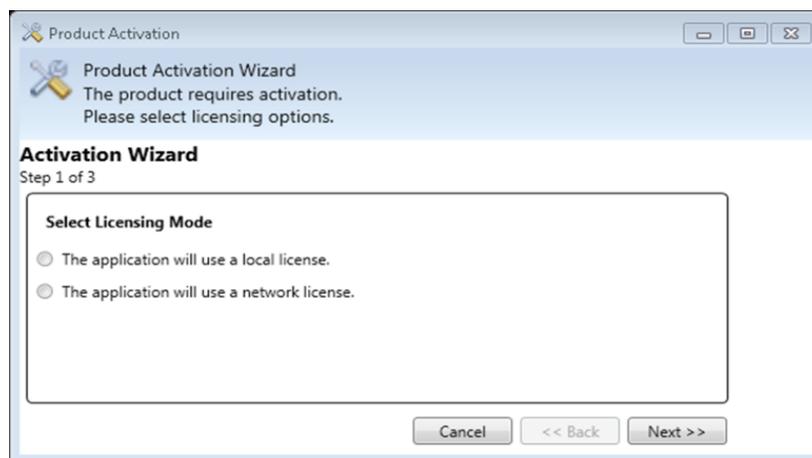
1. Click **Start**, then type "*firewall*" and press enter. The Windows Firewall with Advanced Security window will open.
2. In the left hand pane, click **Inbound Rules**.
3. In the Actions pane (on the right) click **New Rule**. The New Inbound Rule Wizard will open.
4. Select **Program**, and then click **Next**.
5. Click **Browse**.
6. Navigate to the C:\Windows\System32 folder and select the *hasplms.exe* file.
7. Click **Open**, and then click **Next**.
8. Select **Allow the connection**, and then click **Next**.
9. 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.)
10. Click **Next**.
11. In the Name field, enter *HASP LM*, then click **Finish**.

Step 2: Licensing GENESYS Products

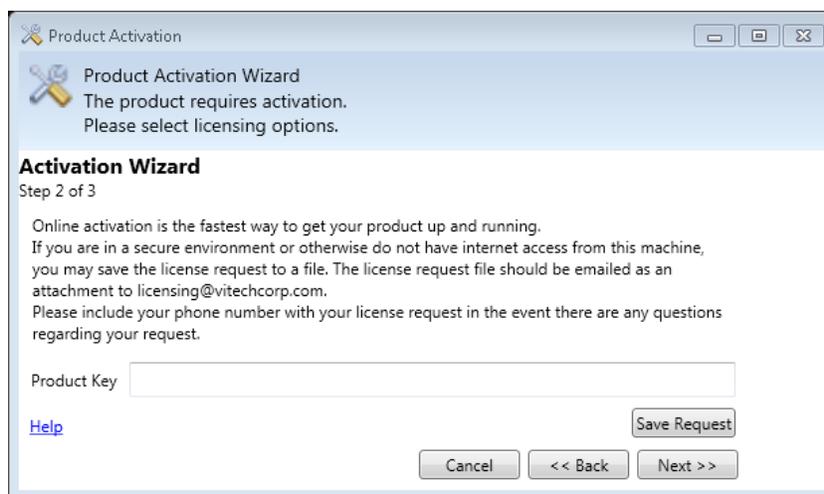
For specific information about the licensing types, refer to **GENESYS Licensing Options**. If you have any questions or need assistance at any point throughout this process, please contact Vitech Customer Support at +1 540.951.3999 or support@vitechcorp.com.

General Instructions for Activating a GENESYS License

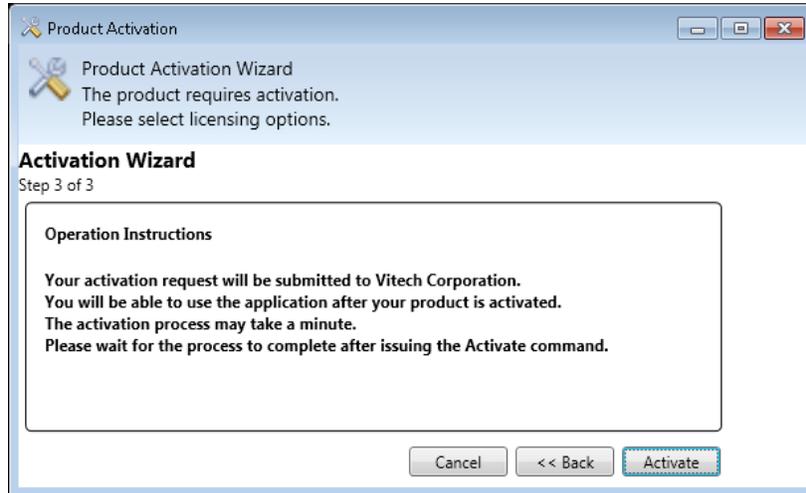
1. Download GENESYS.
2. Upon first launch, you will be prompted to complete the Product Activation.
3. Select the Licensing Mode as specified in the Vitech Fulfillment “Welcome Letter” and click **Next**.



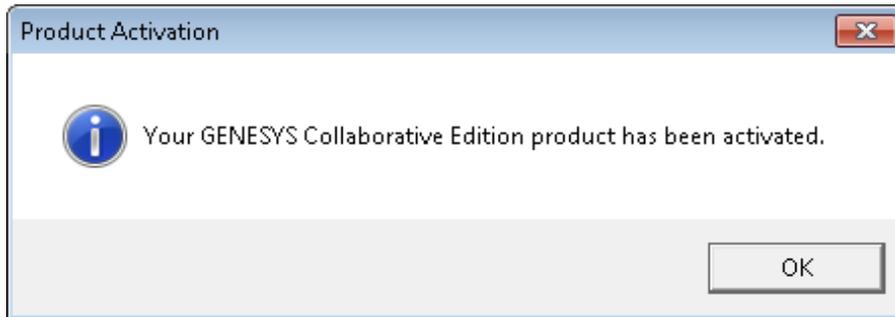
4. Copy and Paste the Product Key provided by Vitech into the blank field and click **Next**.



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



6. You will receive the following confirmation once the software has been activated successfully.



Step 3: Getting Started with GENESYS

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

Logging into a Local Repository

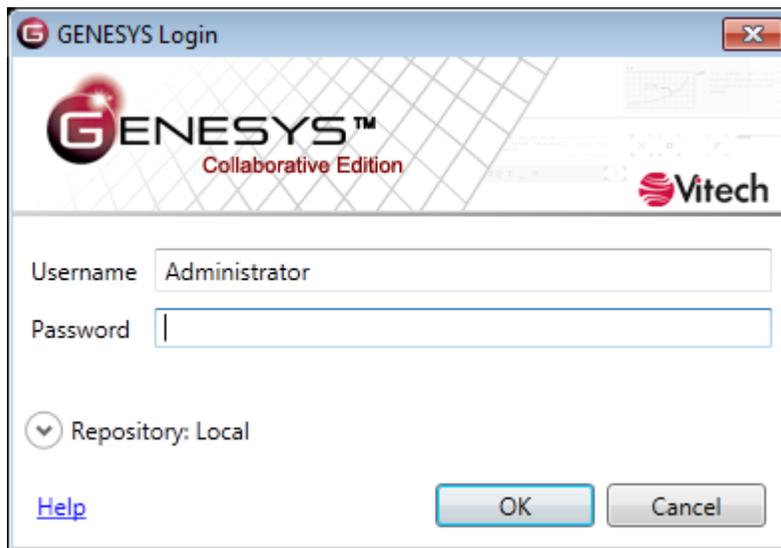
The installation program creates a new program group entry on the start menu with the title "GENESYS Collaborative Edition". It contains an entry labeled "GENESYS Collaborative Edition". Simply click on this menu item.

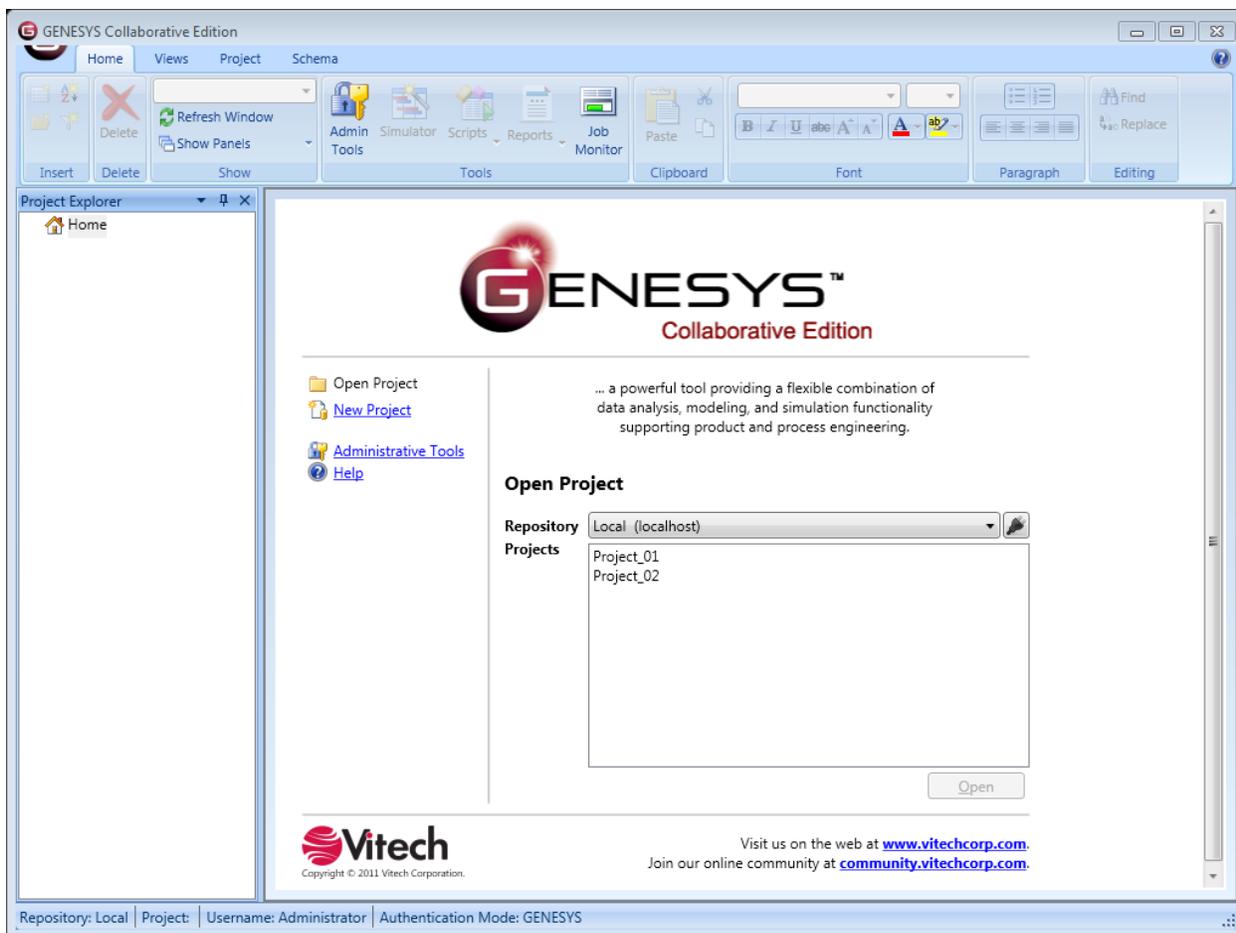
Note: If the **Microsoft Windows Firewall** is being used and you are using a network capable license a firewall window will appear when you start CORE for the first time. Windows Firewall will ask you to choose to either block or unblock. Select **Unblock**. The GENESYS Login window will then appear.

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

User Name: 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.)





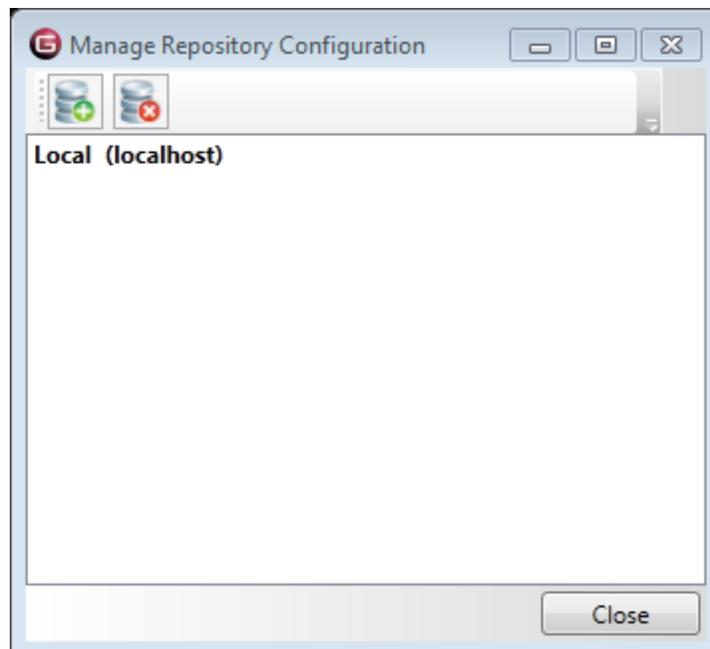
After logging in, new user accounts can be created and passwords may be changed via the User/Group Tool accessible via the Administrative Tools link.

Logging into 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.

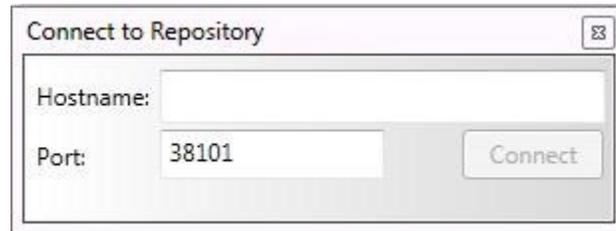


Click the **Add Repository** icon.



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

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



The image shows a dialog box titled "Connect to Repository". It contains two input fields: "Hostname:" which is currently empty, and "Port:" which contains the value "38101". A "Connect" button is located to the right of the port field. There is also a close button in the top right corner of the dialog box.

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

Additional Tips

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

Check for Latest Service Packs

Periodically Vitech Corporation provides Service Packs to upgrade the GENESYS product suite. Please check to ensure that you have the latest Service Pack by visiting the Downloads page at www.vitechcorp.com.

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 GENESYS' new .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 On-line 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 3 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 8 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 CORE 8.

If you need assistance migrating data to the CORE 8 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 and 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 Collaborative Edition\Data folder.

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: GenesysCollaborativeSvc and MSSQL\$GENESYSCOLLAB.
3. Locate the archived files and save them to the \ProgramData\Vitech\GENESYS Collaborative Edition\Data, overwriting the blank files currently in that folder.
4. Start the following services in the order listed: MSSQL\$GENESYSCOLLAB and GenesysCollaborativeSvc.

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.

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.

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 1.1.

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