



Installation Guide

Installation Guide

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

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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/resources.



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Webinar archive with over 40 hours of premium industry and tool-specific content.



[Screencasts](#)

Short videos to guide users through installation and usage of Vitech software.



[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 Vitech software help files.



[Technical Papers](#)

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



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Knowledge Base, Exclusive Webinars and Screencasts, Chat Support, Documents, Download Archive, etc.

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

All Resources	Advanced
Beginner	IT / Sys Admin
Intermediate	Student

Installation Guide

GETTING STARTED

Welcome to the GENESYS 4.1 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

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

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 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 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 — The Sentinel 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 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 4.1 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 obtain SQL Server Express and install it separately. Please contact Vitech Customer Support for instructions.

1. Download the GENESYS 4.1 Collaborative Edition installer from the Vitech website and open the file. The InstallShield Wizard will launch.
2. In the InstallShield Wizard window, click **Install**. If the installer is downloading and installing SQL Server Express this will take some time.
3. When prompted, click **Yes** to reboot the computer.
4. After rebooting, you may see a Security Warning. If so, click **Run**.
5. In the InstallShield Wizard window, click **Next**.
6. 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.
7. Type your name in the Username field. Type your organization’s name in the Organization field. Click **Next**.
8. 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.
9. GENESYS reports can be configured to use either US Letter or A4 paper. Select the appropriate paper size and click **Next**.
10. Click **Install** to proceed.
11. The installation will now run.
12. 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 username and password prepared to use to log in to the SQL Server.

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1. Download the GENESYS 4.1 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 Username 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. GENESYS reports can be configured to use either US Letter or A4 paper. Select the appropriate paper size and click **Next**.
7. 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**.
8. 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** then select the server and SQL Server instance hosting your Repository database.
9. Select the authentication type being used and, if SQL Server authentication is specified, enter your 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 7 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 REPOSITORY4 within SQL server (we recommend that dbowner permissions are used). Click **Next**.
10. Click **Install** to begin the installation or click **Back** to change settings.
11. 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 (6.0 or higher) and asp.net are also required to be running.

1. Download the GENESYS 4.1 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.

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- 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 Username 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 in the IIS root folder. 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. Click **Next**.
 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 4.1 Collaborative Edition

Firewall exceptions for GENESYS 4.1 Collaborative Edition are needed only when connecting to a repository on another machine. This is true for connections to another installation of GENESYS 4.1 Collaborative Edition as well as connections to GENESYS 4.1 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 “*38401*.” (Note: Port 38401 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 4 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.

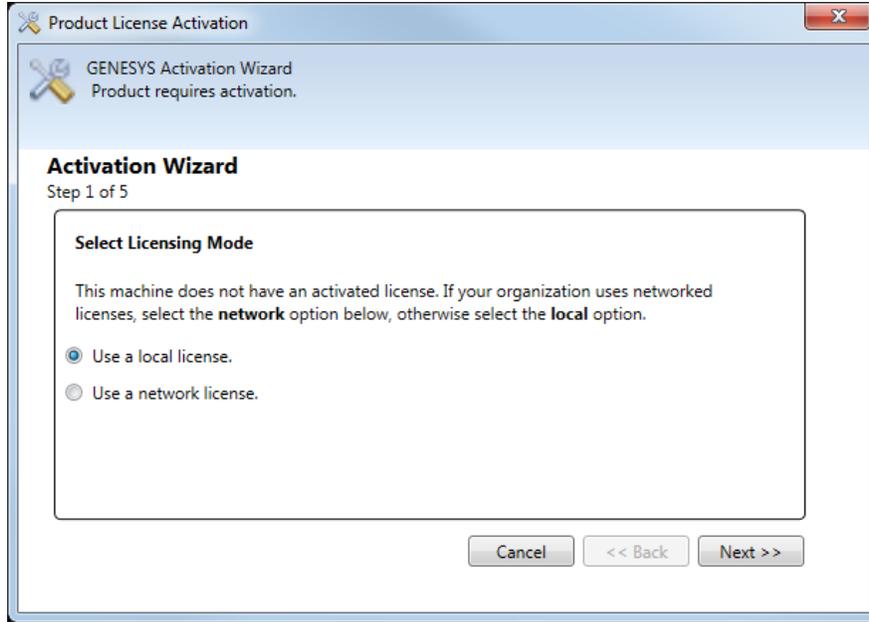
1. Click **Start**, then type “*firewall*” and press **Enter**. The Windows Firewall with Advanced Security window will open.
2. In the left-hand pane, click **Inbound Rules**.
3. In the Actions pane (on the right) click **New Rule**. The New Inbound Rule Wizard will open.
4. Select **Program**, and then click **Next**.
5. Click **Browse**.
6. Navigate to the **C:\Windows\System32** folder and select the **hasplms.exe** file.
7. Click **Open**, then 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 “*Sentinel LM*,” then click **Finish**.

STEP 2: LICENSING GENESYS PRODUCTS

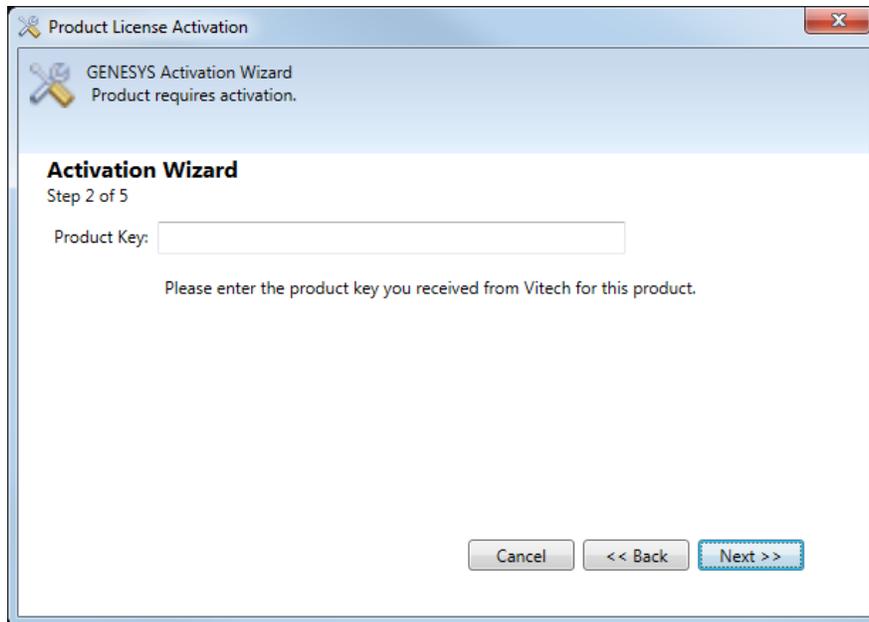
For specific information about the licensing types, refer to GENESYS Licensing Options. If you have any questions or need assistance at any point throughout this process, please contact Vitech Customer Support at +1 540.951.3999 or support@vitechcorp.com.

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 Licensing Mode as specified in the Vitech Fulfillment “Welcome Letter” and click **Next**.

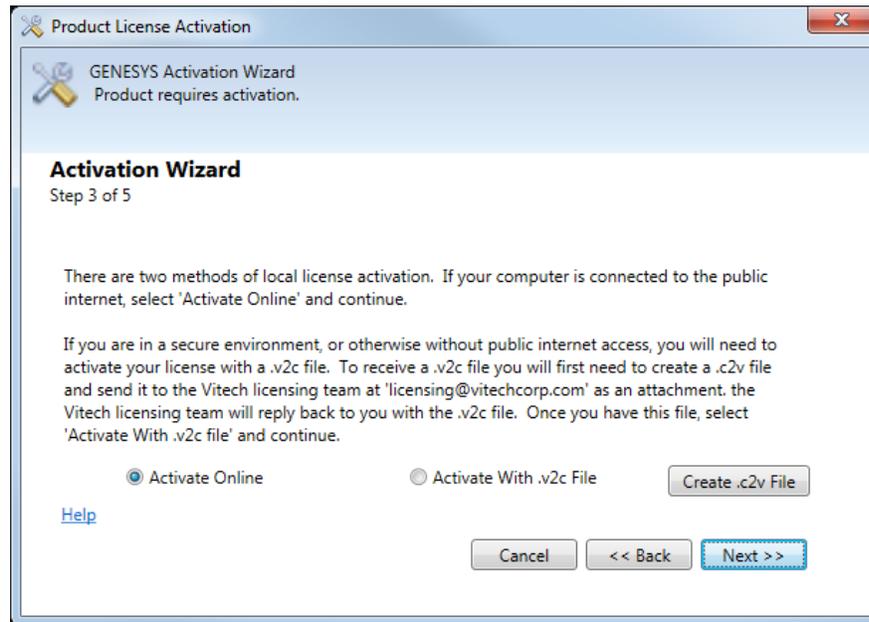


4. Copy and Paste the Product Key provided by Vitech into the blank field and click **Next**.

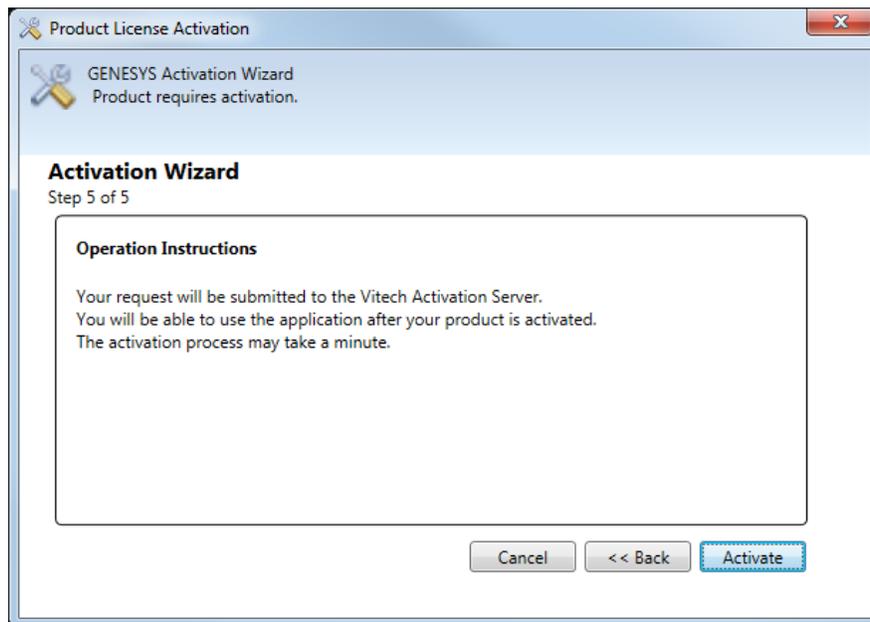


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5. Select your activation method as defined in your Welcome Letter. (Most activations use a product key.) Click **Next**.



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



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

STEP 3: GETTING STARTED WITH GENESYS 4.1

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

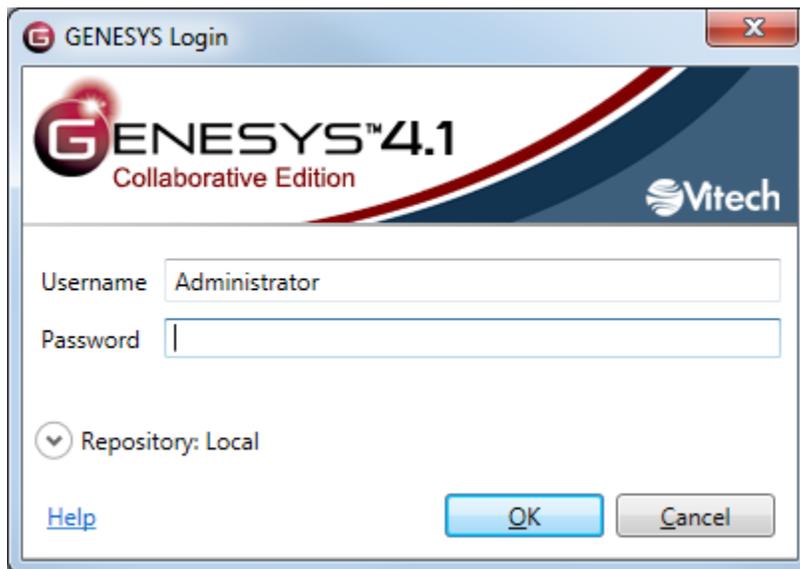
Logging in to a Local Repository

The installation program creates a new program group entry on the start menu with the title "GENESYS 4.1 Collaborative Edition." It contains an entry labeled "GENESYS 4.1 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.

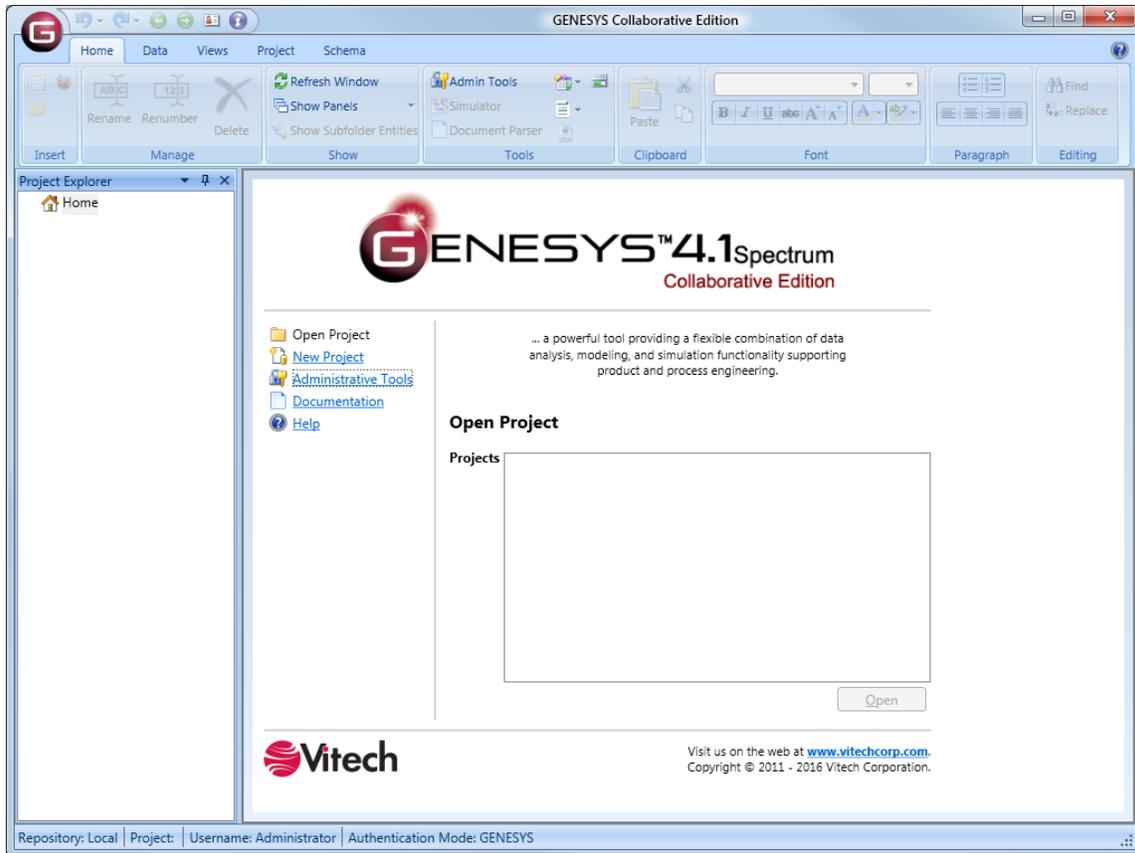
The GENESYS Login window shown below will open. GENESYS is configured with one initial user account—the Administrator account. The username and password are case sensitive. Log in as shown below:

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).

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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.

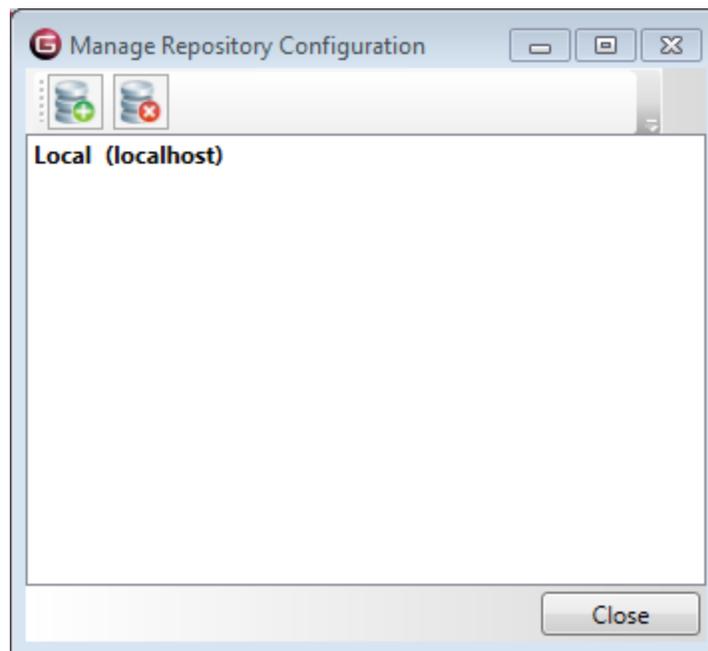
Logging in to a Remote Repository

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.

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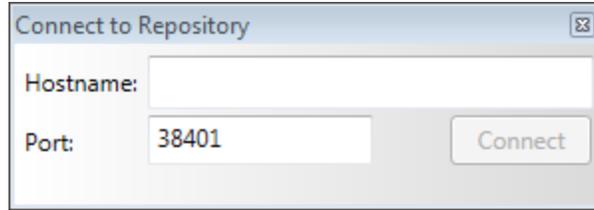
Click the **Add Repository**  icon.



Enter the machine name where the repository is hosted. This may be another instance of GENESYS 4.1 Collaborative Edition or a GENESYS 4.1 Server.

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

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

Special Considerations for GENESYS 4.0 Users

Installing GENESYS 4.1

GENESYS 4.1 is an upgrade to GENESYS 4.0. All data, including Users and Groups will migrate automatically to GENESYS 4.1. Older GNSX files can be imported directly into GENESYS 4.1. GENESYS 4.1 products will NOT install side-by-side with GENESYS 4.0. Note that GENESYS 4.1 includes an upgrade to the license mechanism. Therefore, it is necessary to stop the “Sentinel LDK License Manager” service before installing GENESYS 4.1 Collaborative Edition or GENESYS 4.1 Server.

Special Considerations for GENESYS 3.0 Users

Installing GENESYS 4.1

GENESYS 4.1 products will install side-by-side with GENESYS 3.0. Note that GENESYS 4.1 includes an upgrade to the license mechanism. Therefore, it is necessary to stop the “Sentinel LDK License Manager” service before installing GENESYS 4.1 Collaborative Edition or GENESYS 4.1 Server.

Moving your data

A simple migration utility has been built into GENESYS 4.0. 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 GENESYS 3.0.
2. Export your project to GNSX format, using the *Project Backup* option.
3. Log out of GENESYS 3.0.
4. Log in to GENESYS 4.0.
5. Import your GNSX file, allowing the import wizard to create the new projects for you. While doing this, add a 3 to the beginning of the project name. This will help you in a later step.
6. Select the **Project** tab on the ribbon, then click **Migrate Schema**.
7. The Schema Migration Wizard will open.
8. 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**.
9. The Job Monitor Dialog will open and alert you when the migration is complete.
10. When complete, examine the Job Monitor Dialog to see if conflicts were reported. Examine the Conflict log if one is available.
11. A new project has been created using the name you specified in Step 8. Review this project.
12. When you are satisfied with the results, close, then delete the project you named in Step 5.
13. Upon first login, a user’s password will expire. The user must change their password in order to proceed. (This was a necessary step to enable FIPS 140 compliance.)

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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, 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 Corporation 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 <http://www.vitechcorp.com/downloads/index.shtml>.

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.

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.

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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 4 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:
 - a. "GENESYS 4.1 Collaborative Edition Services Host" (Genesys4CollaborativeSvc),
 - b. "SQL Server (GENESYSCOLLAB)" (MSSQL\$GENESYSCOLLAB).
3. Locate the archived files and save them to the \ProgramData\Vitech\GENESYS 4 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 4.1 Collaborative Edition Services Host" (Genesys4CollaborativeSvc).

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 4.1.

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APPENDIX

Prerequisites for Installation

GENESYS 4.1 Collaborative Edition requires that the Microsoft .NET Framework 4 be installed on the computer. This must be installed before running the GENESYS 4.1 Collaborative Edition installer.

Most computers will already have this prerequisite installed. If you do not have this installer and run the GENESYS 4.1 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, you can access the installer and installation instructions here: <http://www.microsoft.com/en-us/download/details.aspx?id=17718>.



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