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## 2D DESIGNER

# Migration Guide

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# 2D DESIGNER V2008 Migration Guide

This migration guide is designed to help you make a smooth transition from previous versions of 2D DESIGNER to the V2008 version.

The 2D DESIGNER V2008 applications (AutoFLOW, AutoORTHO, AutoISO, and AutoELECTRIC) operate essentially the same way as previous versions of 2D DESIGNER have. However, 2D DESIGNER V2008 contains some features that make the applications much more powerful than previous versions of the software. These new features require several simple setup steps.

For 2D DESIGNER V2007, you will need to:

- Map your Datafiles during the installation

For 2D DESIGNER V2004 Professional users, you will need to:

- Import your piping specifications to version 2008
- Export the version 2004 Professional projects and import them into the version 2008 Standards Manager

For 2D DESIGNER V2004 Standard and earlier 2D DESIGNER users, you will need to:

- import specs from a previous version
- create a drawing standard, making use of existing settings

The steps to complete these tasks are outlined below in greater detail. Follow this migration guide carefully, and you'll be up and running quickly.

# Installation Options

2D DESIGNER V2008 has some very flexible installation options. 2D DESIGNER V2008 has the ability to run completely from a server, or it can run off local workstations, while sharing settings, licensing and drawings from a server. There are many options to choose from, many more than in previous versions of the software. If you're not sure which installation is best for your business, please contact us at: <http://www.procad.com/cgi-bin/pdesk.cgi>, and we'll help you out.

During installation, you will have to choose the locations of three different portions of the application:

- Licenses
- Data Files
- Applications

## License Installation

If you are working on your own, either in a home office, or in an office with only one license of 2D DESIGNER V2008, then you'll probably want to locate the licenses on the local individual machine. If there are multiple users, it is recommended that you purchase networked or concurrent licenses, and install the licenses onto a network server.

## Data Files Installation

The data files location is where the piping specifications, drawing standards, and other important information such as dimensional data are located. If there is more than one user of the software, then it is always recommended that the Data Files is installed onto a network server. This does not have to be the same server as the licenses.

## Application Installation

The actual application files may be run from either the local individual computer or run across the network. The advantage of having the applications on a server is that there will be only one location that will need to be updated. However, depending on the other requirements and traffic on the application server, performance may be compromised.

For more information, see the *Installation User Guide*.

# Licensing Considerations

Before receiving your permanent license for your upgraded 2D DESIGNER software, PROCAD requires that you send in uninstall codes (or hardware locks) to show that you have removed the previous version. However, this could cause an interruption for the software users, so the following steps are generally recommended.

- Installation of the new software
- Request temporary license. Apply licenses and test the new software.
- When satisfied that the new system is up and running correctly, generate the uninstall code or send in the hardware lock
- Request permanent licenses. This will be sent to you once the uninstall code has been verified or the hardware lock has been received.

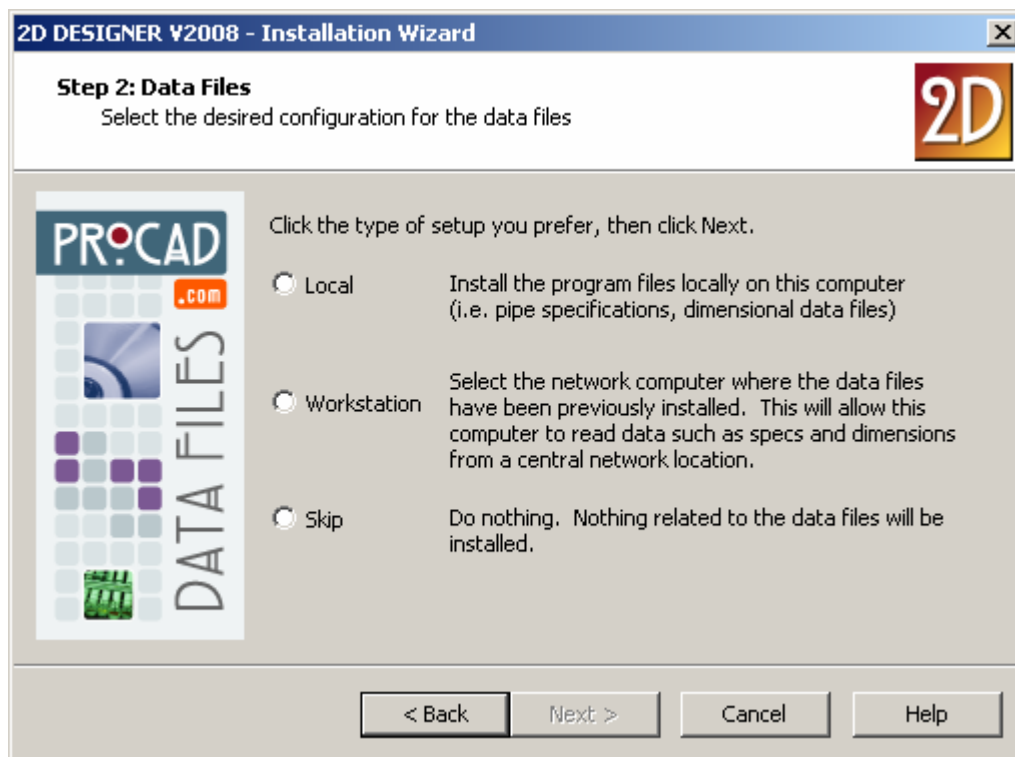
Please see the *License Management User Guide* to view procedures for requesting licenses and generating uninstall codes.

# Upgrading from 2D DESIGNER V2007

The Datafiles, containing the specifications, drawing standard settings, and dimensional data, have not changed format between 2D DESIGNER V2007 and 2D DESIGNER V2008.

However, to accommodate update changes for Microsoft's new operating system, Windows Vista, the default location of these files has changed.

Therefore, during the installation, ensure that you select the *Workstation* option for the Datafiles .



You will then be able to define the location of these files. The default location on standalone installations is c:\program files\PROCAD\2D DESIGNER V2007\Datafiles.

# Standards Manager



2D DESIGNER V2008 uses drawing standards to control settings for groups of drawings. The Standards Manager allows you to have different sets of settings (i.e. layer settings, specs, component scaling, etc.) for different standards.

**\*Important Note:** The Standards Manager cannot be bypassed. You must have at least one drawing standard defined.

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## Importing 2D DESIGNER V2004 Professional Projects

For 2D DESIGNER V2004 Professional users, the Project Manager has been renamed to Standards Manager. This is to more accurately reflect the purpose of the application, which is to organize a fixed number of drawing standards, or ways of drawings to appear, as opposed to projects, or which there may be tens or hundreds of in a year.

In order to import the 2004 Professional Projects, they must first be exported. The exported files will have an extension of \*.xpj.

### *To export a project....*

1. In the Project Manager window, right-click on the project you want to delete.
2. The right-click menu appears.
3. From the menu, click on **Export**.
4. Select the location and name of the exported file.

-OR-

1. In the Project Manager window, right-click on the project you want to delete.
2. From the **Project** menu, click on **Export**.
3. Select the location and name of the exported file.

Once the projects have been exported, they may then be imported into the 2D DESIGNER version 2008 Standards Manager.

*To import a project into the Standards Manager....*

1. In the Standards Manager window, select Import from the **Standards** menu.
2. Navigate to the location of the \*.xpj.
3. Highlight the \*.xpj file and click the **Open** button. The new Standard created from the imported Project file will appear in the navigation pane.

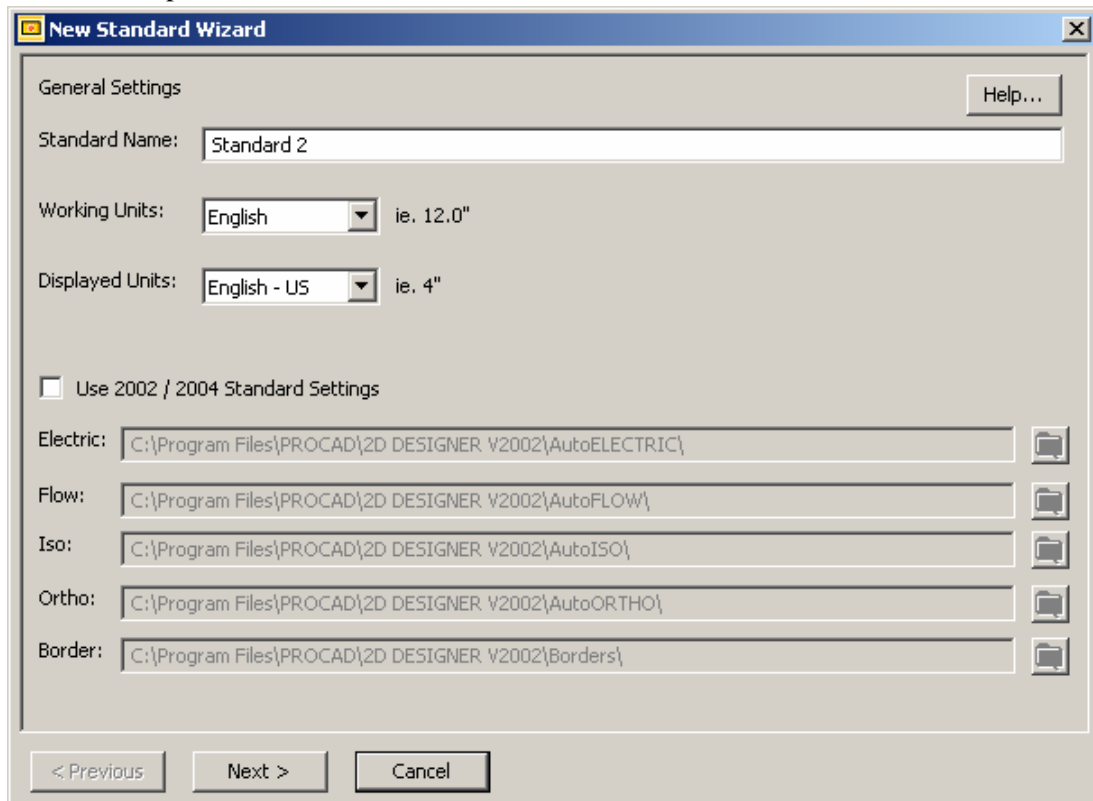
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## Creating a New Standards

Use this procedure to create a new standard. Users that are upgrading from versions earlier than 2004 and the 2004 Standard edition should refer *Creating a New Standard Using 2002 or 2004 Project Settings*.

*To create a new standard....*

1. Click the New Standard button.  The *New Standard Wizard* dialog box opens.



2. In the Name field, type a name for your drawing standard.

3. In the Working Units field, select the units you want the data to appear in, either Imperial or Metric, from the drop down list.

➤ *Note:* Working units refers to the length and coordinates information used to place components.

**English:** to have length and coordinates information displayed in English units.

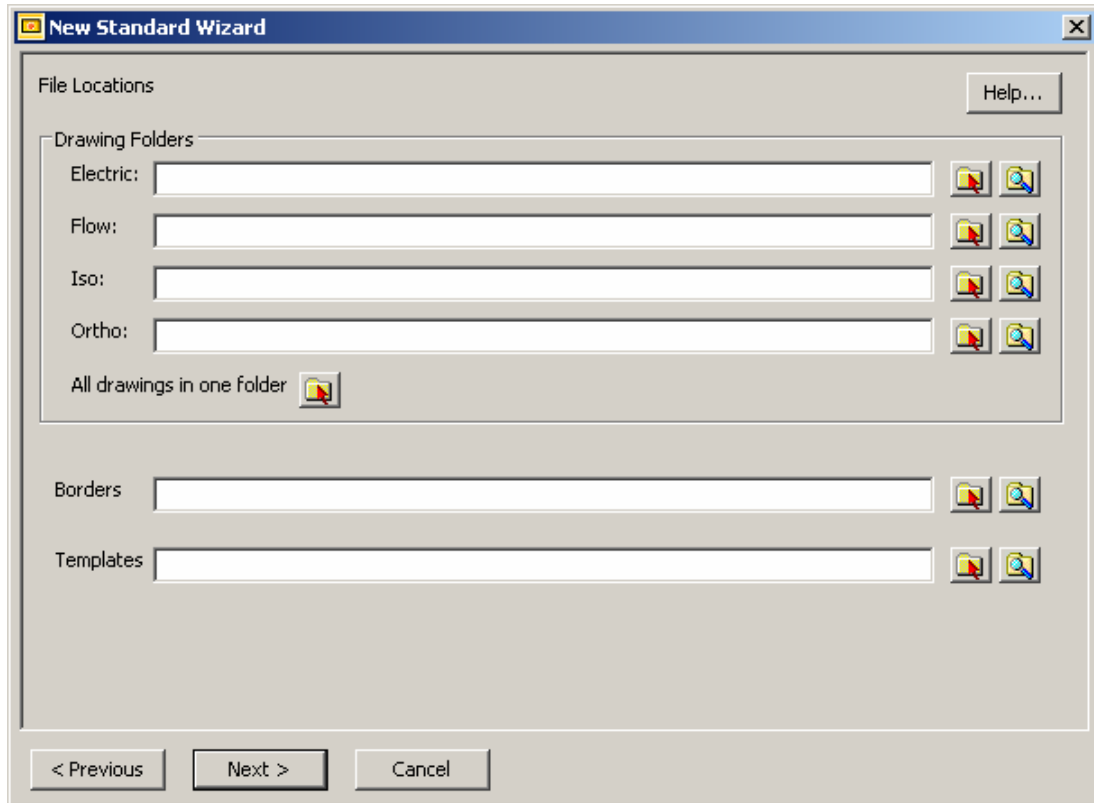
**Metric:** to have length and coordinates information displayed in metric units.

4. In the **Displayed Units** field, select the units you want the data to be displayed as from the drop down list: Imperial US, Imperial NPS, Metric OD or Metric NPS.

➤ **Note:** Displayed units refer to units that appear when selecting component sizes.

- **English - US:** to have component sizes displayed in US English units (example, 4")
- **English - NPS:** to have component sizes displayed in English units using standard nominal pipe size designations (example, NPS 4)
- **Metric - OD:** to have component sizes displayed in metric units using standard pipe OD size designations (example, 114.3mm)
- **Metric - NPS:** to have component sizes displayed in metric units using standard nominal pipe size designation (example, 100mm)

5. Click Next.



6. If you wish to open the drawings through the Drawing Manager in the applications, you need to define the drawing location.
  - **Note:** The Drawing Manager will allow you to explore in any subfolders that exist below the folder location defined in this dialog box. Therefore, it is recommended that you select the highest level folder where all drawings that will use the drawing standard are located. For example, you may have a drawing folder structure such as:

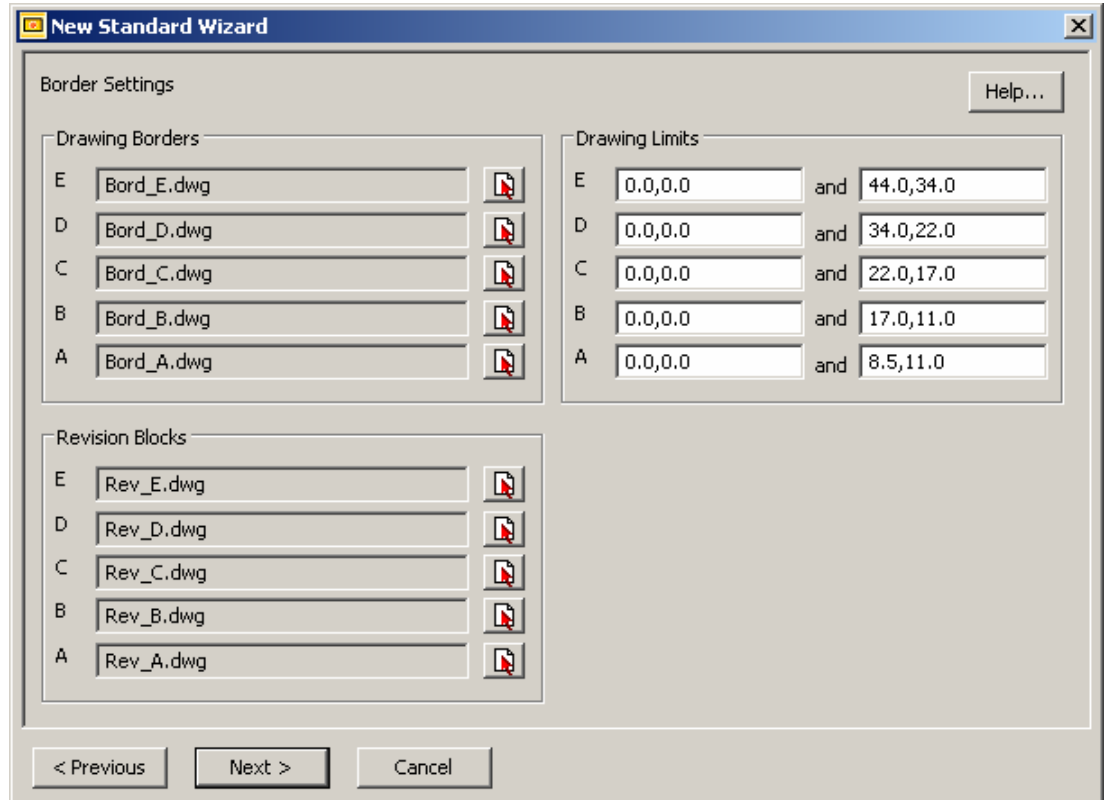
```

  / Client A
    / Project #A
      / Iso drawings
      / P&ID drawings
    / Project #B
      / Iso drawings
      / P&ID drawings
```

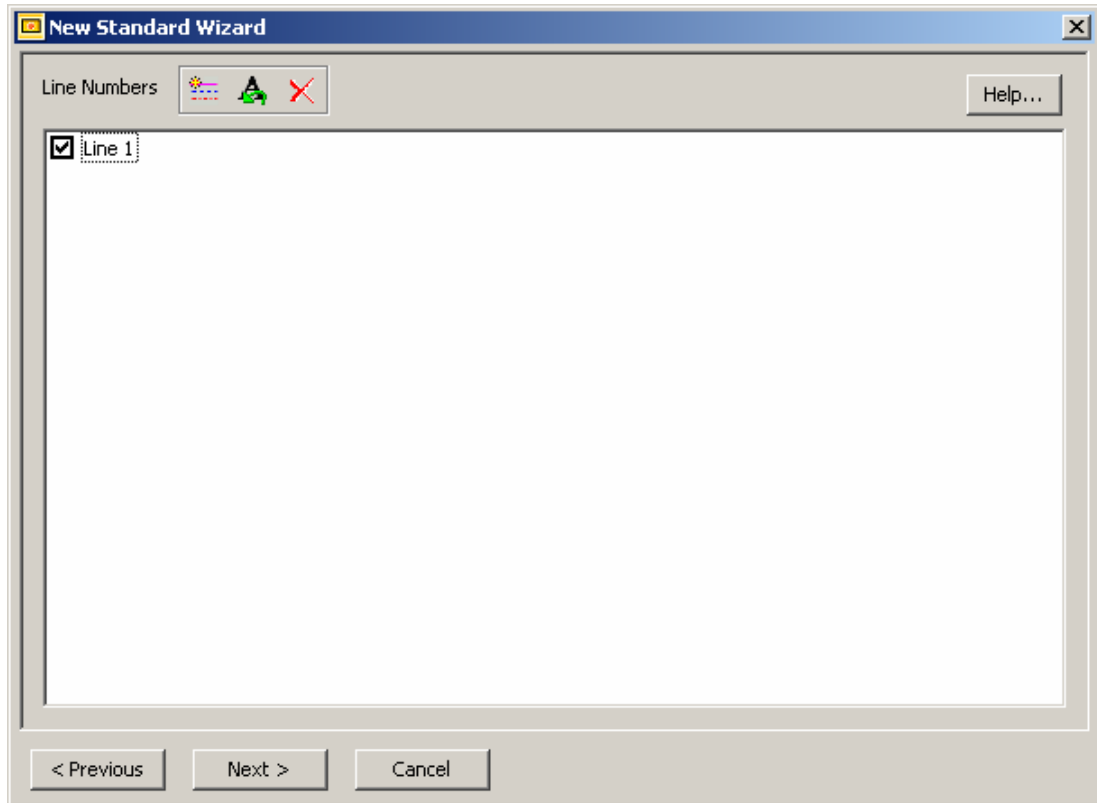
If all drawings under the Client A folder are to use the same drawing standard, then this folder should be used as the defined drawing location.

7. Define the location of your borders.

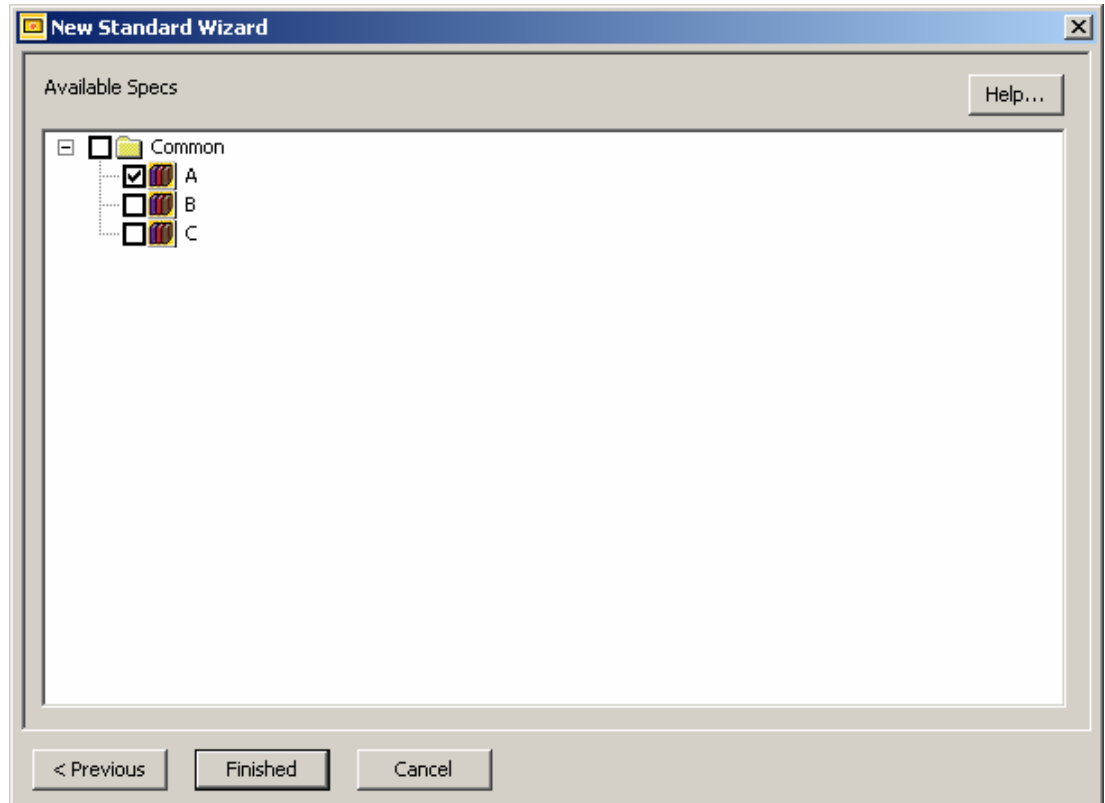
8. Define the location of any customized templates.
9. Click the *Next* button.



10. Define the borders to be inserted when the Insert Border command is used in the applications. For more information, please refer to *Error! Reference source not found.* and *Error! Reference source not found.*
11. Click the *Next* button.



12. Create and check in line numbers required for the project. For more information, see *Standards Manager User Guide*.
13. Click *Next*.



14. Check in any specifications that are required for the standard. For more information, see *Standards Manager User Guide* and the *Spec Generator User Guide*.
15. Click *Finished*.

The new Standard will now appear in the Navigator bar to the left hand side

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## Turning Off The Drawing Manager

Many users have expressed that they like the idea of using projects for settings, but would like the simplicity of opening drawings using the standard Windows **File\Open** command. To do this, you need to set a project to load automatically on startup. To do this, you would open one of the applications (i.e. AutoFLOW), and when the Drawing Manager appears during startup, right-click on a project (projects are listed on the left side), and choose **Open** (if you do not see this option, it's most likely you don't have the latest files).


In future times that you run AutoFLOW, the Drawing Manager will not appear, and those project settings will be loaded in automatically. If you would like to have a different project load in automatically, simply press the **Drawing Manager** button on the top left, and choose another project.

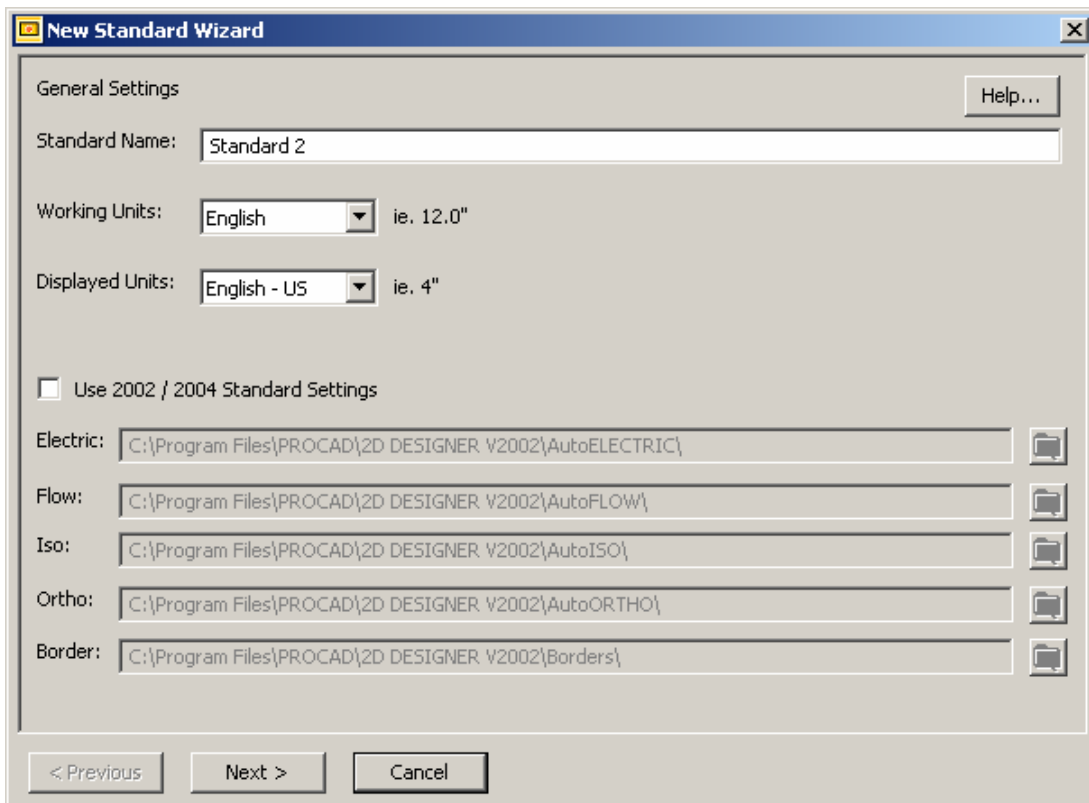
## Creating a New Standard Using 2002 or 2004 Project Settings

Users of earlier versions of any of the 2D DESIGNER applications may want to transfer their existing settings into the new Standard Manager. This allows for continuity in drawing appearance and decreases the time required to setup a new Standard.

Settings can be imported during the creation of a new Standard. Refer to ***Error! Reference source not found.*** for this procedure. The older settings get imported on the first dialog box of the New ***Standard Wizard***.

### ***To Import 2002 or 2004 Standard Settings***

1. Click the New Standard button.  The ***New Standard Wizard*** dialog box opens.



2. Select the working and displayed units and enter a name for the new Standard.
3. Click the Use 2002 / 2004 Standard Settings check box.

The paths will default to the newest software installation path. For example, if 2D DESIGNER V2004 Standard is installed, the paths will use the path for this installation. In the image above, 2D DESIGNER V2002 was detected.

4. If any of the settings are on the installation file, specifically any imperial.lsp, metric.lsp or BorderMap.ini, you will need to change the locations, respectively.
5. Click the Next button.
  - Continue the Standard creation as described in the *Standards Manager User Guide*.

# Spec Generator



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## Importing Specs From a Previous Version

You'll probably have specs from a previous version that you'll want to use with 2D DESIGNER V2008. To import these specs, all you have to do is run the **Spec Generator** program, found in the 2D DESIGNER V2008 folder on your desktop, and follow these steps.

- click the **Specs** menu
- click the **Import** option
- the **Browse for Folder** dialog box appears
- choose a spec folder to import, and then click OK
- a Spec Generator dialog box appears with a message saying the spec was successfully imported
- the imported specs should now appear in the **Current Specs** list
- **Note:** the imported specs are not usable in a Standard until you select the specs by using the Standards Manager (diagram below).

