Migration to New Upgrade - Carlson Office

Each year a new upgrade version of Carlson Office software comes available, for example from 2025 to 2026. These instructions apply to any software upgrade (ie. new purchase, new version/new year) not an update to a current version. When upgrading (not updating) to a new software version it is often associated with several unwanted issues (ie. custom settings, profiles, the Graphic User Interface (GUI), and others). This Quick Reference Guide (QRG) has been developed to alleviate most if not all these issues. This guide should aid customers in migrating custom settings to a new version of the software. This migration process will result in the creation of at least the following files.

- .cui
- .cfg
- .arg

1. Creating and Saving the Workspace

Below are instructions for creating a custom Workspace (which stores your custom screen layout) and copying that Workspace to a new computer or a different version of the software.

Creating a Workspace:

1. In your older version, type WORKSPACE into the command line and press Enter
2. At command prompt, type SA (for SaveAs)
3. Type a custom name for your Workspace. If using an existing custom workspace replace it with the same workspace name so that it will be overwritten.

Backing up/Copying CUI file:

1. In the older version, type CUI into the command line and press Enter to get the dialog box shown in *Figure 1 CUI Workspace Dialog*.

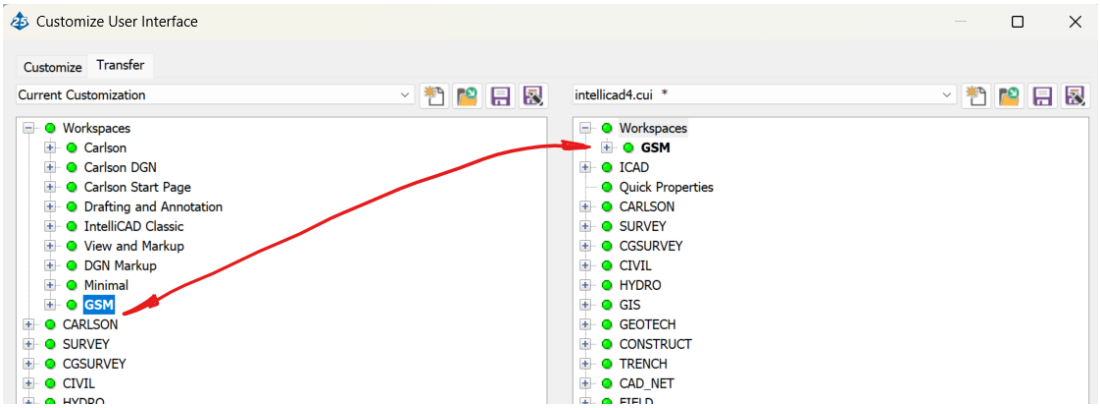


Figure 1 CUI Workspace Dialog

2. Click the Transfer tab near the top of the dialog
3. If not already visible, expand the left-side Workspaces branch in the tree diagram
4. Open and Select the custom workspace (ie.GSM), click the right button, and select *Set Current*
5. Select the Save icon to save the current custom CUI as a .cui file in a desired directory.
6. Click-and-drag your custom workspace (ie. GSM) from the left side of screen to the Workspaces branch on the right side of the screen.
   Note: it may be helpful to verify menus, toolbars, and ribbons reflect the current desired settings.
7. Save the .cui file shown on the right Workspaces branch. Keep this .cui file in safe location for regular backup.
8. The above steps will create a xxx.cui file.

This .cui file will be used to migrate to the new computer or software version. If moving to a new computer, copy this file to the new desktop (or network drive accessible to both)

2. Saving all Configuration Settings

1. With the older version of the Carlson Office currently active, navigate to *Carlson Configure* found on the Settings tab of the menu bar which will launch the Configure Dialog box as shown in Figure 2.

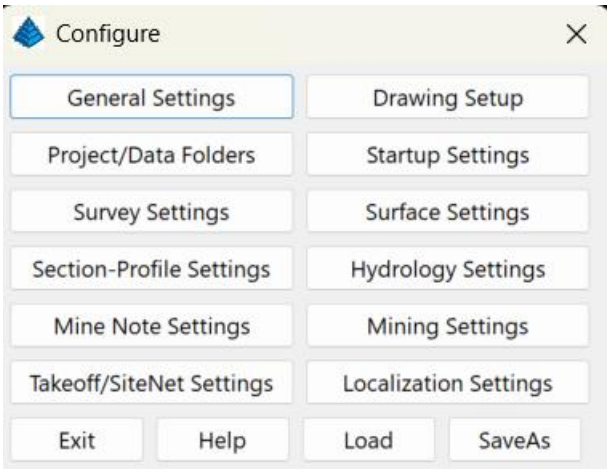


Figure 2 Configure Dialog

2. Click on the *SaveAs* button (lower right) and navigate to a folder of your choice and make whatever changes you wish.
3. Using the above steps and doing a *SaveAs* will create a xxx.cfg file which can be loaded later with a new upgrade of the software.

3. Saving a Profile

This step is a good one to take if there is a need to move your profile items to a reload of the Carlson software but ARE NOT upgrading to a new year. The *Save Profile* will not work on new software versions only updates and reinstalls of the same version on a different computer. The user will need to type *Options* on the command line to obtain access to all the options available on this dialog box.

Common Options settings many users find helpful:

- Type Options on the command line
- Select the *Display* tab> to change the following colors
    - Most users prefer to see a background of black when viewing a drawing in layout space. See Figure 3.

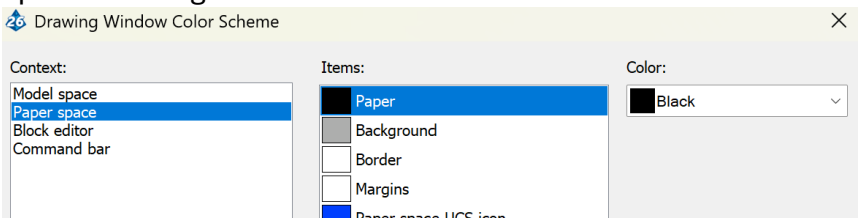


Figure 3 Options>Color Scheme Dialog

- Select the *Users Preferences* tab and then Mouse Settings button. Many users prefer to have the right button on the mouse act as an enter key (rather than using the enter key on the keyboard). See Figure 4.

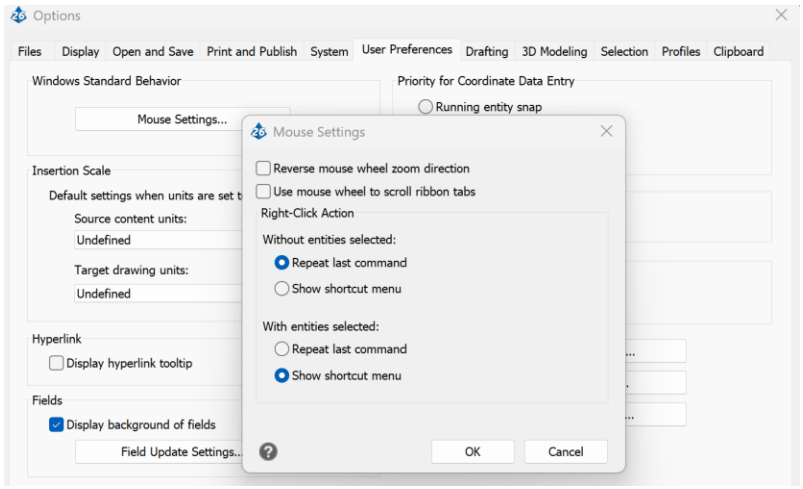


Figure 4 Options > Mouse Settings

- Select the *Selection Tab* and set the Pick box and Grip size the same at around 10. See Figure 5 Pickbox Size and Grip Size.

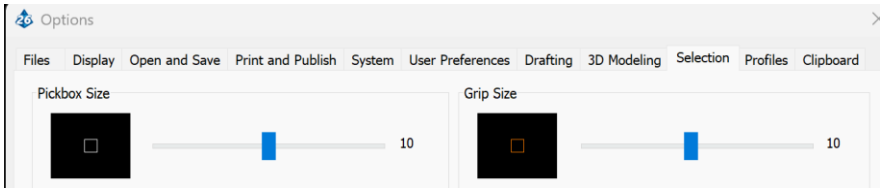


Figure 5 Pickbox Size and Grip Size.

- These options settings are the most common used. Saving a Profile is the next step.

Steps to Save a Profile

1. Type *Options* on the command line OR on the Menu bar Settings Tab<Intellicad Options
2. Navigate to the *Profile* tab (see Figure 6 Options_Profile dialog)
3. Highlight the Carlson 20xx profile (shown with a Green radio button)
4. Click the *Copy...* button and rename the profile to a unique name (ie. company or personal initials)
5. Set this new profile as current by clicking the *Set Current* button
   Note: Doing this step will allow the user to continue making profile changes and have these changes be included in the current profile.
6. The above steps defining this profile can be exported and will create an xxx.arg file which can then be imported to a new computer, etc. but will not work on a new "upgrade"

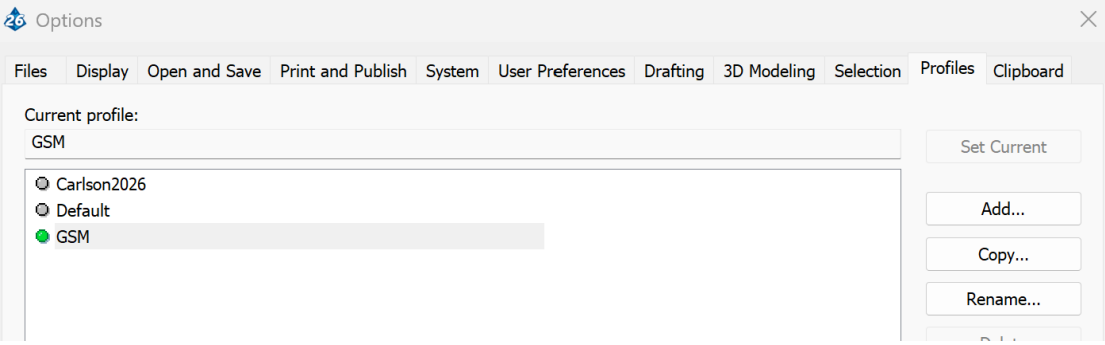


Figure 6 Options_ Profile Dialog

4. Saving Other Settings files

Most all settings have an option *SaveAs or Export* allowing the user to save and load custom settings with a unique settings file name as desired. Sample settings files may include: xxx.lgl (Legal Description), xxx.fld (Field to Finish), xxx.adf (Specify Annotation Defaults File), etc. It is recommended that these settings files be in a directory that can be regularly managed, accessed, and backed up. Be sure to make them with unique names because a Carlson upgrade could overwrite these settings files if the file names are just the default names produced by the Carlson software.

Additional Settings to consider:

- Annotate Defaults
- Carlson Explorer (LA) layers, texts, dimensions, blocks, etc.
- Settings > Carlson Configure
- Surface > Triangulate & contour
- Annotate > Line/Curve Table Defaults
- Settings > Quick Keys
- Drawing Templates (.dwt)

Transferring Settings

Workspace:

1. Open the new software
2. Type *CUI* at the command line and press Enter. A dialog box will appear titled Customize User Interface.
3. Click the *Transfer* tab near the top left which will show a left and right half of the dialog box.
4. Select the *Open* icon from the upper right half of the dialog box and browse to select the old .cui file. See Figure 7. When the browse and selection are completed, the program shows the Workspace branch which will include the .cui file and displays branches on the right side of the dialog.

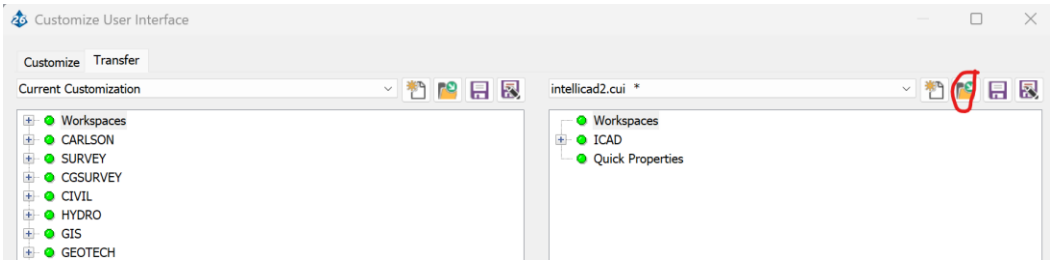


Figure 7 Configuring User Interface dialog

5. Click the + next to the Workspaces branch which will display the old .cui file (this file will be shown bold).
6. On the left half of the dialog under *current customization* select the + to expand the workspace branch. If a workspace file has the same name as the workspace file name being transferred delete the workspace file under current customization (left half of the dialog). Deleting this file may be done by right clicking and then selecting delete.
7. Click-and-drag the old Workspace file from the Workspaces branch on the right side of the screen to the Workspace branch on the left side of the dialog. Shown under Current Customization.
8. Verify that the .cui file has transferred successfully by opening the Workspaces branch on the left side of the dialog and reviewing the Menus, Toolbars, and Ribbons to see if they match the preferred customization from the old .cui.
9. Click OK to close the CUI dialog

Once the CUI has been transferred switch to the custom (ie GSM, etc.) Workspace and set it as the default:

1. Double-click the blue gear icon in the lower right corner of the screen

2. Select your custom Workspace to set it as current
3. Double-click the blue gear icon again and select Workspace Settings
4. Set your Workspace as default by picking it in the "My Workspace" drop-list
5. Select the "Do not save changes to workspace" option at the bottom of the dialog*

*The reason for turning off automatic saves to the Workspace is to prevent accidental corruption. If the program crashes or closes unexpectedly (such as when switching to a different Carlson module) with the automatic save enabled, the Workspace may be corrupted. If this happens, the workspace can be recovered by repeating the above steps.

At this point the Graphic User Interface (GUI)/ Workspace should look as expected per your customized workspace from the previous version of the software. However, most likely the preferred palettes will not be visible using the above steps so they will need to be loaded and configures as desired. (ie. Properties (Props command), Layer Properties Manager (LA command)).

Configure Settings

1. On the Menubar navigate to *Carlson Configure* found on the Settings tab of the menu bar which will launch the Settings Dialog box as shown in Figure 8 Configure dialog box.

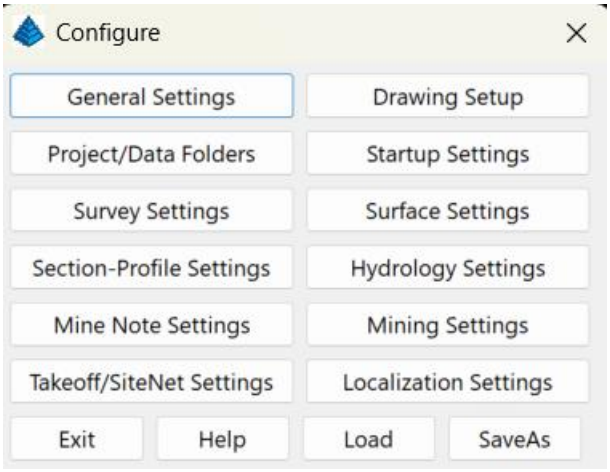


Figure 8 Configure dialog box

2. Click on the *Load* button (lower right) and navigate to your settings folder containing the custome .cfg file and click *Open*.
   Note: This often includes 40,000+ settings and will show you exactly how many settings have been saved.

5. Saving Other Settings files

Most all settings in Carlson have an option to *SaveAs or Export* allowing the user to save and inversely to *Load* custom settings with a unique settings file name as desired. Some of the Carlson settings are not loaded automatically in the Configure Settings dialog as described above. These may include: xxx.lgl (Legal Description), xxx.fld (Field to Finish), xxx.adf (Specify Annotation Defaults File), etc. It is recommended that these settings files be placed in a directory that can be regularly managed, accessed, and backed up.

Additionally, if a specific template is desired for use upon startup with the new software version you may refer to the authors Quick Reference Guide (QRG*) QRG_Making and Using a Template*.