



# **Aras Office Connector**

## **12.0R5**

### **Upgrading from Version 12.0R1**

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Aras Corporation  
100 Brickstone Square  
Suite 100  
Andover, MA 01810

**Phone:** 978-691-8900

**Fax:** 978-794-9826

**E-mail:** [support@aras.com](mailto:support@aras.com)

**Website:** <https://www.aras.com>

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# Document Conventions

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The following table highlights the document conventions used in the document:

Table 1: Document Conventions

Convention	Description
<b>Bold</b>	Emphasizes the names of menu items, dialog boxes, dialog box elements, and commands. Example: Click <b>OK</b> .
Code	Code examples appear in <code>courier</code> font. It may represent text you type or data you read.
<b>Yellow highlight</b>	Code highlighted in yellow draws attention to the code that is being indicated in the content.
<b>Yellow highlight with red text</b>	Red text highlighted in yellow indicates the code parameter that needs to be changed or replaced.
<i>Italics</i>	Reference to other documents.
<b>Note:</b>	Notes contain additional useful information.
<b>Warning</b>	Warnings contain important information. Pay special attention to information highlighted this way.
Successive menu choices	Successive menu choices may appear with a greater than sign (-->) between the items that you will select consecutively. Example: Navigate to <b>File --&gt; Save --&gt; OK</b> .

# 1 Overview

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The steps outlined in this document describe how to upgrade Aras Office Connector version from 12.0R1 12.0R2, 12.0R3, or 12.0R4 to version 12.0R5. These changes affect both the server database and the client machine.

Upgrades from an earlier version of Aras Office Connector, such as version 11, to version 12.0R5 are done as part of the upgrade of Aras Innovator. Upgrade Services are a benefit of a Premier Subscription package and can be requested as a service from Aras Support.

When requesting Upgrade Services from Aras Innovator 11.0 or older, please notify Aras Support that your production instance includes Office Connector.

## 2 Prerequisites

In order to upgrade from Aras Office Connector from version 12.0, 12.0R2, 12.0R3, or 12.0R4 to version 12.0R5, you will need to confirm that your software is currently eligible for upgrade. Then you will need to download the necessary materials for upgrade.

### 2.1 Checking for Eligibility

Please use the following procedure to check that your Aras Innovator code tree and database meet the minimum requirements to apply the Aras Office Connector Solution AML.

1. Log in to Aras Innovator as an administrator.
2. From the Main Menu select Help --> About.
3. Confirm that the dialog shows one of the following:
  - o Aras Innovator 12.0 SP15 Build: 30028
  - o Aras Innovator 12.0 SP16 Build: 30918



Figure 1.

4. Close the dialog.
5. From the TOC, select **Administration\Variables**.
6. Confirm that one of following sets of variables is listed:

Version Major	VersionServicePack	Office Connector
12	SP15	12.0R1 12.0R2 12.0R3 12.0R4

12	SP16	12.0R1 12.0R2 12.0R3 12.0R4
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If you do not meet the service pack requirements listed in the previous steps, then you should contact Aras to discuss your upgrade options.

## 2.2 Obtaining Upgrade Files

The upgrade files are available in the Aras Office Connector 12.0R5 CD Image, inside the **Aras Office Connector 12.0R5 Upgrade Patch.zip** file. This file contains the components necessary to upgrade both the Aras Innovator Server as well as client machines.



## 3 Upgrading Aras Office Connector Server Components

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This section walks you through modifying the database with the required metadata. Before applying these changes, you should confirm you have all required components.

### Required Components:

- Aras Innovator 12.0 SP9 or 12.0 SP10
- Aras Office Connector version 12.0R1, 12.0R2, 12.0R3, or 12.0R4
- Aras Office Connector Feature License
- Aras Innovator Package Import Export Utilities

### 3.1.1 Applying the Solution AML

1. Notify users the system will be down at a scheduled time, and that they should log out of the system prior to the start of the process.

**Note:** It is best to give at least 24-hour notice, as well as a reminder 15 minutes prior to the upgrade.

2. Backup the database.

**Note:** Place this file in a safe location, as it will be necessary to restore from it if the upgrade fails.

3. Extract the contents of the **Aras Office Connector 12.0R5 Upgrade Patch.zip** file.
4. You will need to import the database package with the Package Import Export Utilities (For more information using this tool, please see the *Aras Innovator 12.0 - Package Import Export Utilities* documentation.)
  - a. You will need to enable the “Super User” login to perform this step.
  - b. Browse to the \PackageImportExportUtilities\Import\ folder and run the Import.exe file

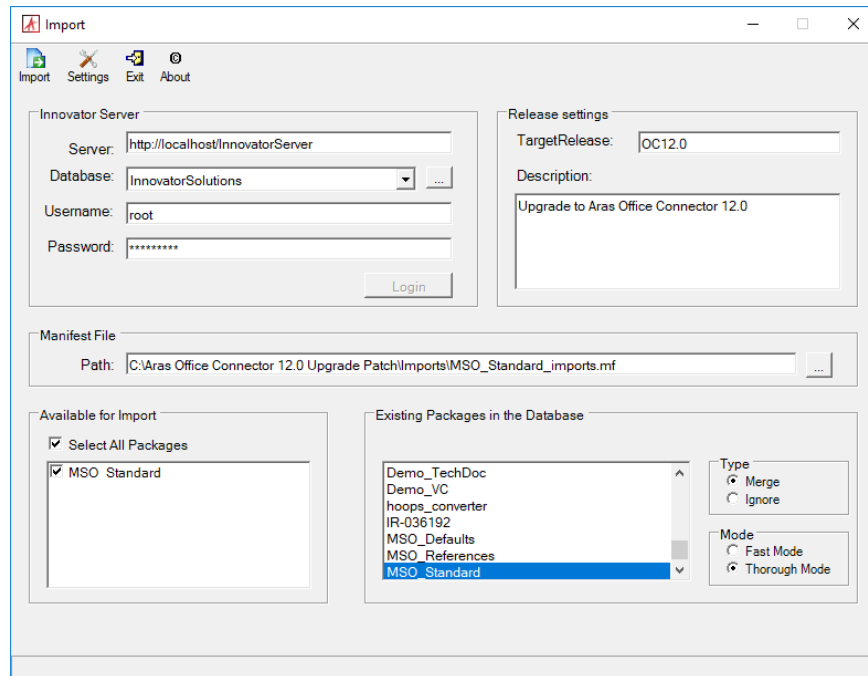


Figure 2.

- c. Input the following information:
  1. Server = The connection URL for Aras Innovator
  2. Database = The target Aras Innovator database
  3. Username = root
  4. Password = Password for “root” login (Default is “innovator”)
  5. Target Release = OC12.0R5
  6. Description = Upgrade to Aras Office Connector 12.0R5
  7. Manifest File Path = The manifest is found in the unzipped patch folder in \Aras Office Connector 12.0R5 Upgrade Patch\imports\MSO\_Standard\_imports.mf
  8. Available for Import = Check "MSO Standard"
  9. Type = Merge
  10. Mode = Thorough Mode
- d. Click the **Import** button.

**Note:** Remember to disable the “Super User” login once complete. This login should not be enabled in production.

### 3.1.2 Confirming the Installation

Use the following procedure to check if your database has been updated correctly.

1. Log in to Aras Innovator as an administrator.
2. From the TOC, select Administration\Variables.

3. Confirm the following variable:

Name	Value
Office Connector	12.0R5

If at any time the installation fails, revert to your backups and contact Aras Support at [support@aras.com](mailto:support@aras.com).

## 4 Upgrading Aras Office Connector Client Components

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The Aras Office Connector must modify Microsoft Office to add the integration components. Before applying these changes, you should confirm your installation of Microsoft Office meets the minimum requirements to run the Aras Office Connector integration.

### Requirements:

- Windows 8.1, or Windows 10
- Microsoft Office 2013 (Enterprise or Professional editions recommended)
- Microsoft Office 2016 (Enterprise or Professional editions recommended)
- Microsoft Office 365, Desktop version
- Microsoft Office 2019 (Enterprise or Professional editions recommended)

**Note:** Version 2013 of Microsoft Visio is not supported.

### 4.1 Installing the Microsoft Office Add-in

1. Shut down all Office programs on the client PC:
  - Microsoft Outlook
  - Microsoft Word
  - Microsoft Excel
  - Microsoft PowerPoint
  - Microsoft Visio
2. Uninstall Aras Office Connector client from the local machine by going to **Control Panel --> Programs and Features**.
3. Copy the `ArasOfficeConnectorSetup.msi` to the Client PC.

4. Run the `ArasOfficeConnectorSetup.msi`.
5. Click **Next**.

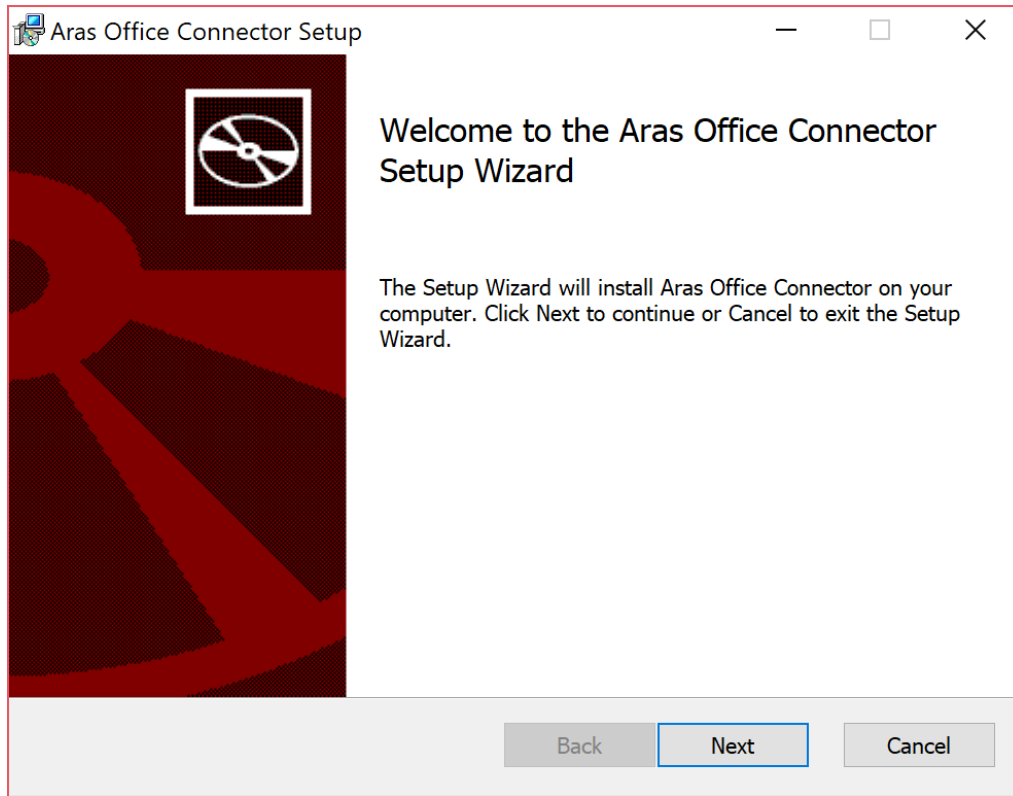


Figure 3.

6. Specify the path where the Aras Office Connector client components will be installed in the Install **Aras Innovator Microsoft Office Connector to:** field.
  - a. (Optional) Check the **Install Office Connector for all users** option to install the extension for all users specified on the PC.

**Note:** By default it will be installed to `%LOCALAPPDATA%\Aras Corporation\Aras Innovator Microsoft Office Connector\`  
Selecting the **Install Office Connector for all users** changes the default directory to `C:\Program Files (x86)\Aras Innovator Microsoft Office Connector\`

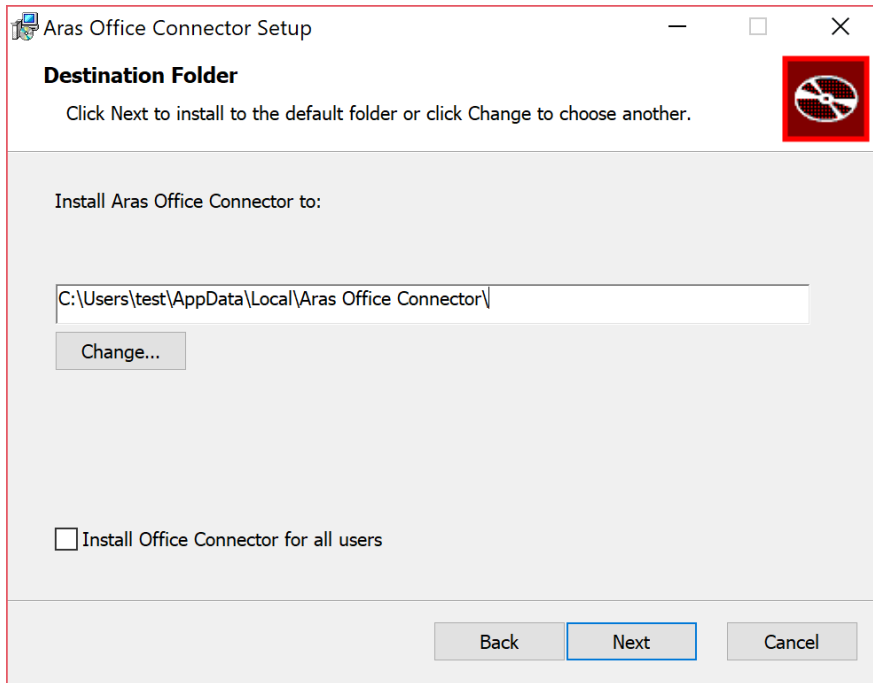


Figure 4.

7. Specify the working directory that Aras Office Connector will use to download files locally.

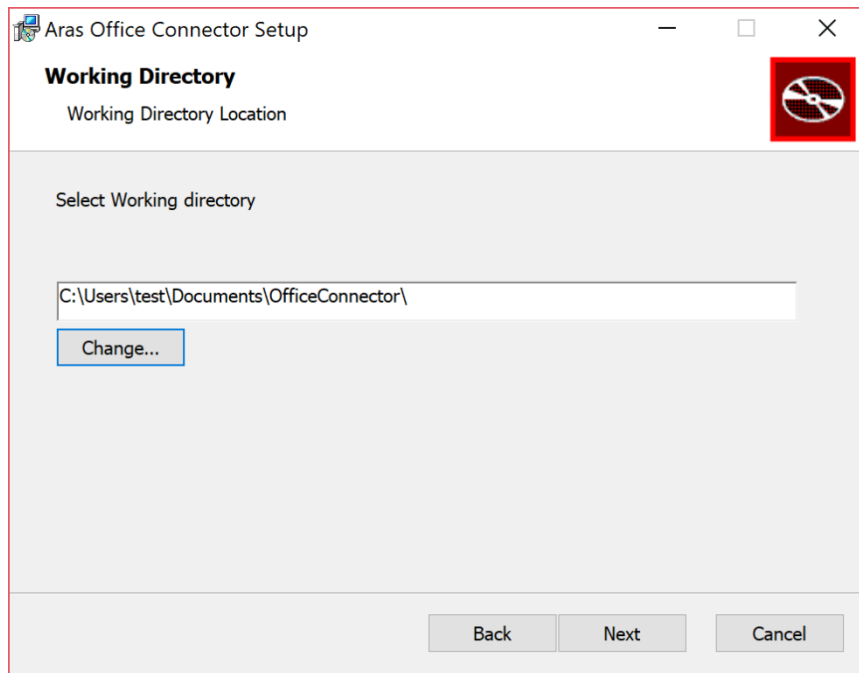


Figure 5.

- (Optional) Add any preconfigured URLs to connect to Aras Innovator.

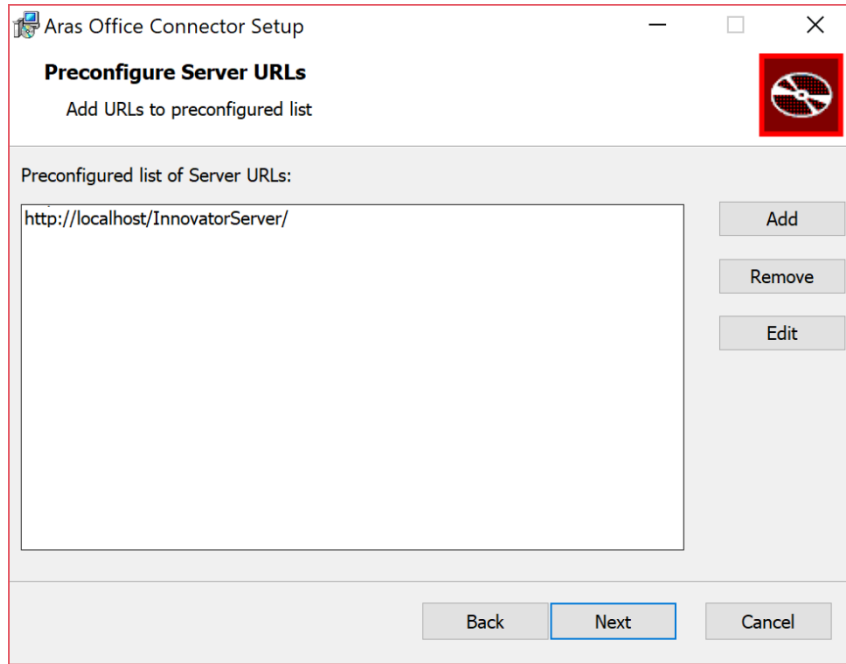


Figure 6.

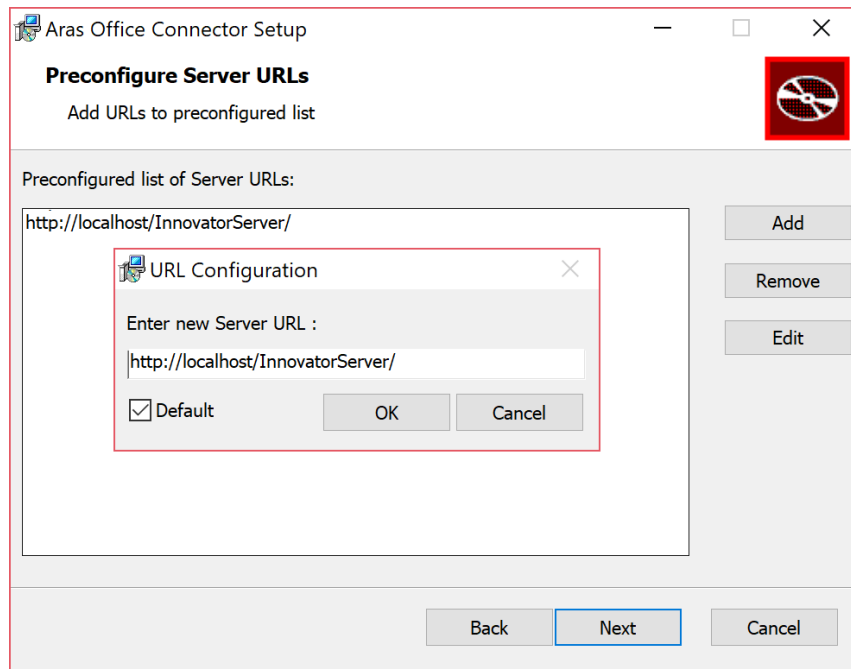


Figure 7.

**Note:** These URLs will be preconfigured for the End User, but they will be able to change, add, or remove any URLs later.

- Specify **Custom** to select the MS Office applications where Aras Office Connector should be installed, or **Complete** to install the add-on on all MS Office Applications.

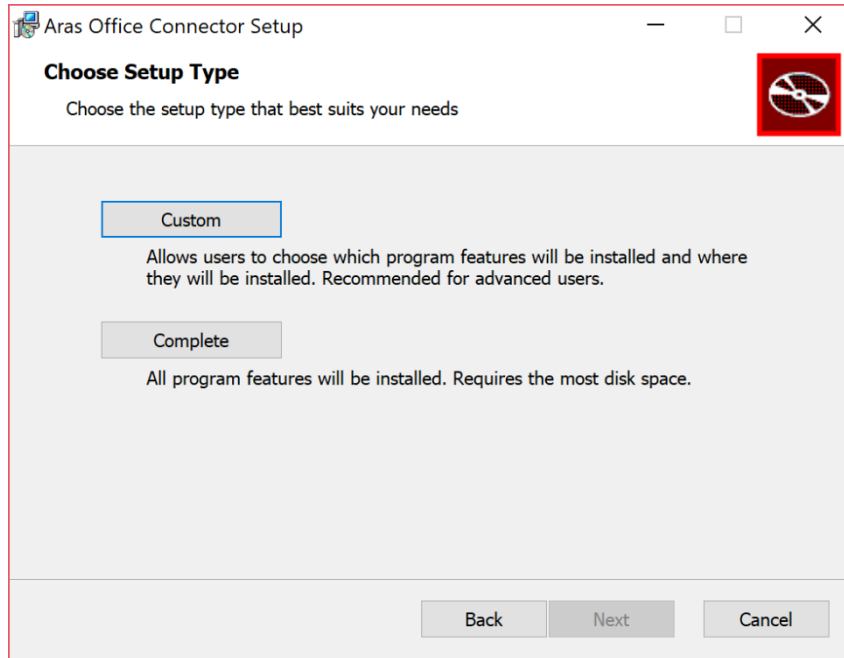


Figure 8.

- Once MS Office applications have been selected, click **Install**.

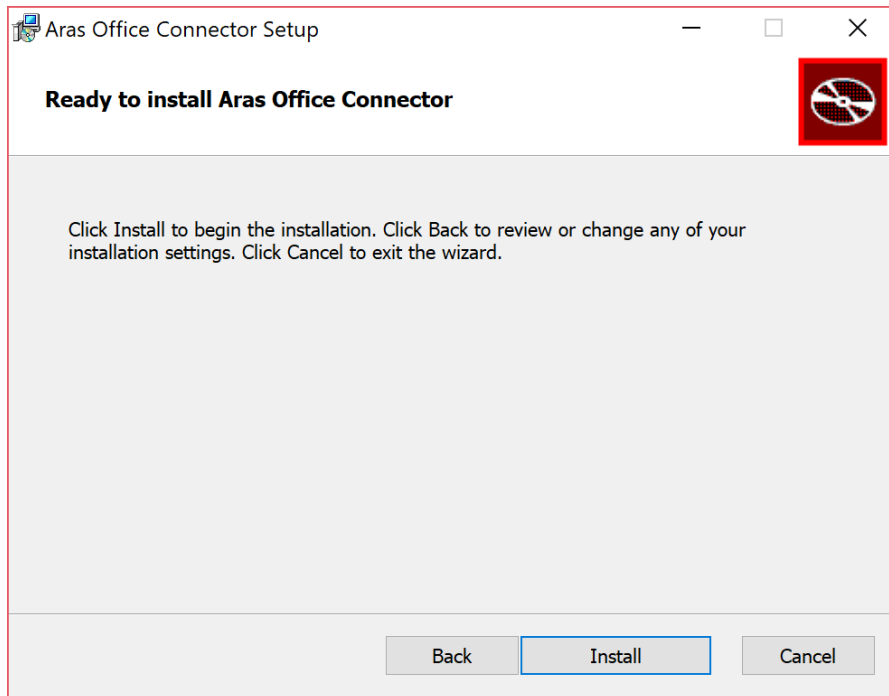


Figure 9.



11. Click **Finish** to exit from the installation.

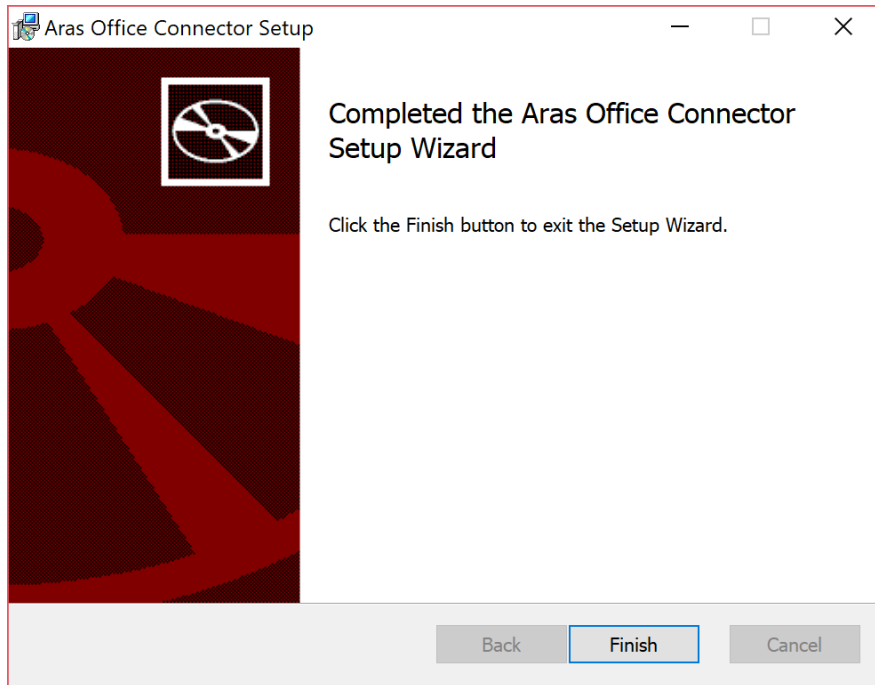


Figure 10.

## 4.2 Confirming the Installation

Use the following procedure to check that your database has been updated correctly.

1. Open Microsoft Word.
2. Confirm that Aras ribbon has been added to Microsoft Word application.

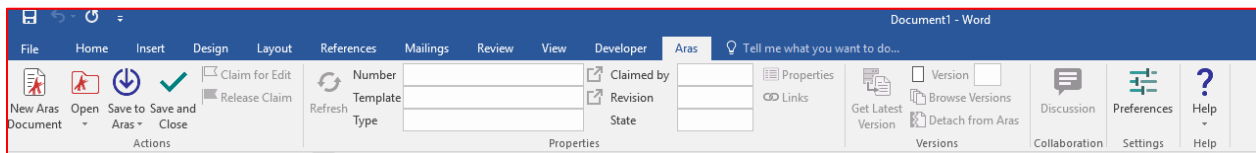


Figure 11.

3. Confirm the version and build of Aras Office Connector by going to the **Aras** tab and selecting **Help --> About**.

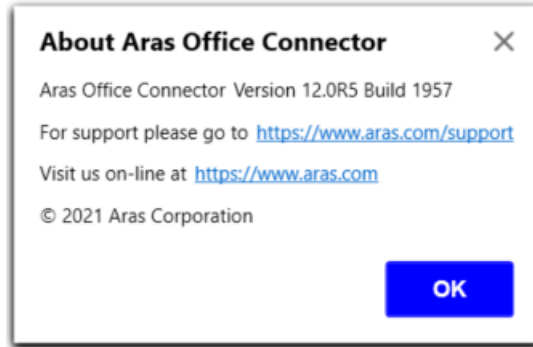


Figure 12.