Aras Office Connector 27

Upgrading from Release 14

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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

Website: https://www.aras.com

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1 Overview

The steps outlined in this document describe how to upgrade Aras Office Connector from 14 to 27. These changes affect both the server database and the client machine.

Upgrades from an earlier version of Aras Office Connector, such as version 12, to 27 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 12.0 or older, please notify Aras Support that your production instance includes Office Connector.

2 Prerequisites

To upgrade from Aras Office Connector from 14 to 27 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 the following:
   - Release 27
4. Close the dialog.
5. From the TOC, select **Administration\Variables**.
6. Confirm that one of following sets of variables is listed:

Version Major	Version Minor	VersionServiceUpdate	VersionLabel	Office Connector
14	0	15	Release 27	14.0.1, 14.0.2, 14.0.3

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 27 CD Image, inside the **Aras Office Connector 27 Upgrade Patch.zip** file. This file contains the components necessary to upgrade both the Aras Innovator Server as well as client machines.

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3 Upgrading Aras Office Connector Server Components

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 27
- Aras Office Connector 27
- 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 27 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 27 - 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

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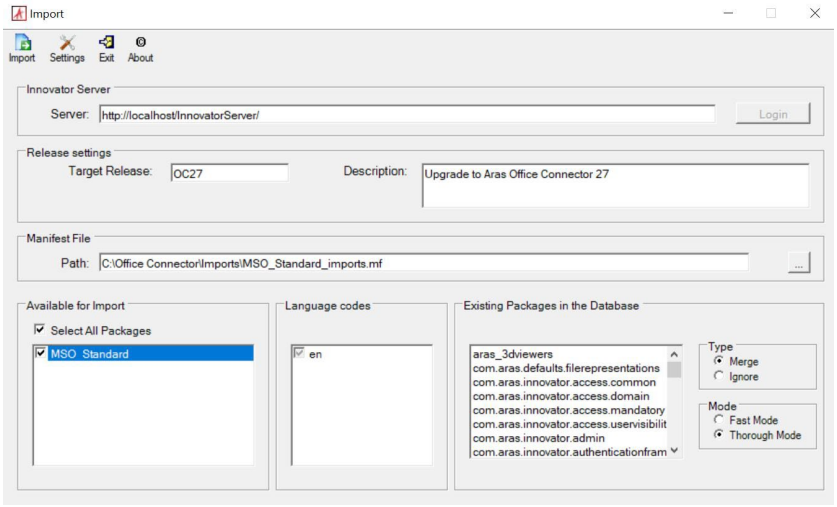

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c. Input the following information:
   1. Server = The connection URL for Aras Innovator
   2. Database = The target Aras Innovator database
   3. Username = root
   4. Password = Password for “root” login (Default is “innovator”)
   5. Target Release = OC27
   6. Description = Upgrade to Aras Office Connector 27
   7. Manifest File Path = The manifest is found in the unzipped patch folder in `\Aras Office Connector 27 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	14.0.4

If at any time the installation fails, revert to your backups and contact Aras Support at support@aras.com.

4 Upgrading Aras Office Connector Client Components

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, Windows 10, or Windows 11
- Microsoft Office 2016 (Enterprise or Professional editions recommended)
- Microsoft Office 365, Desktop version
- Microsoft Office 2019 (Enterprise or Professional editions recommended)

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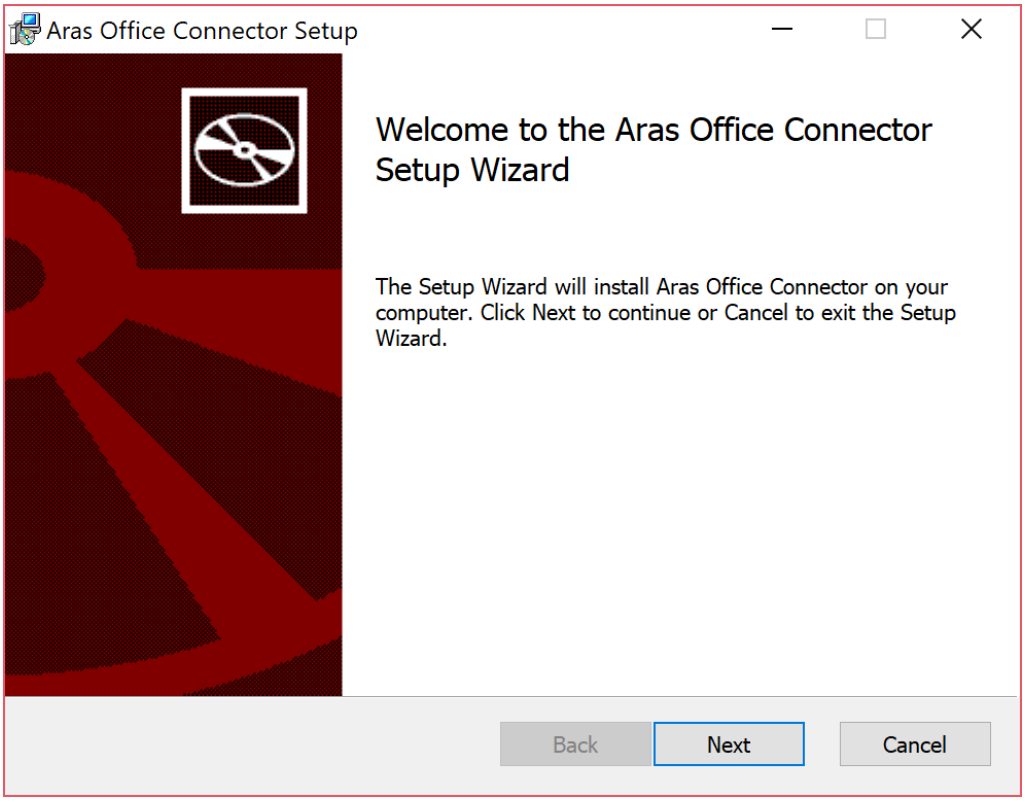
- Microsoft Office 2021 (Enterprise or Professional editions recommended)

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**.



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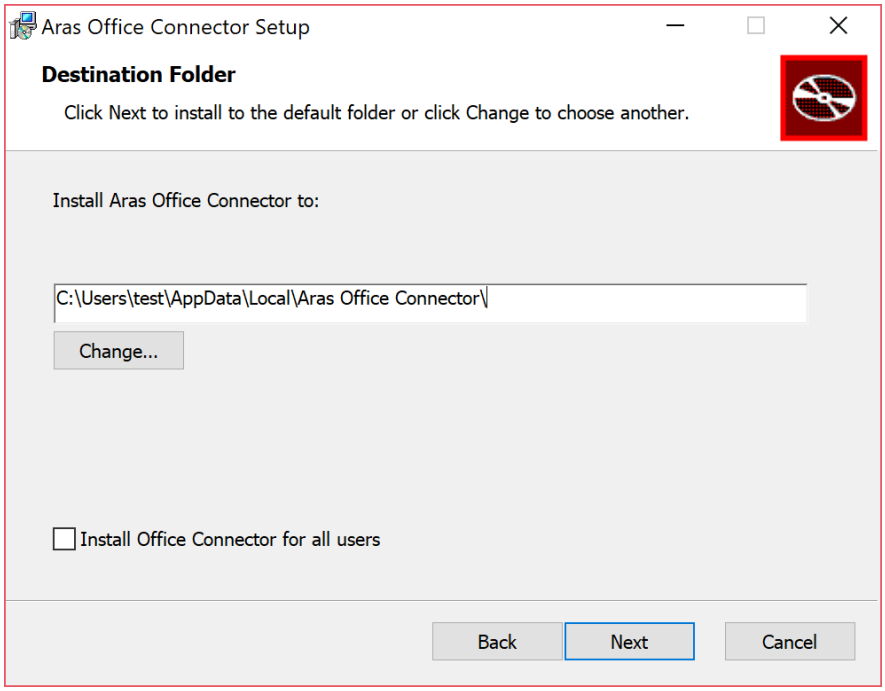
6. Specify the path where the Aras Office Connector client components will be installed in the Install **Aras Innovator Microsoft Office Connector to**: field.
   a. (Optional) Check the **Install Office Connector for all users** option to install the extension for all users specified on the PC.

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\`



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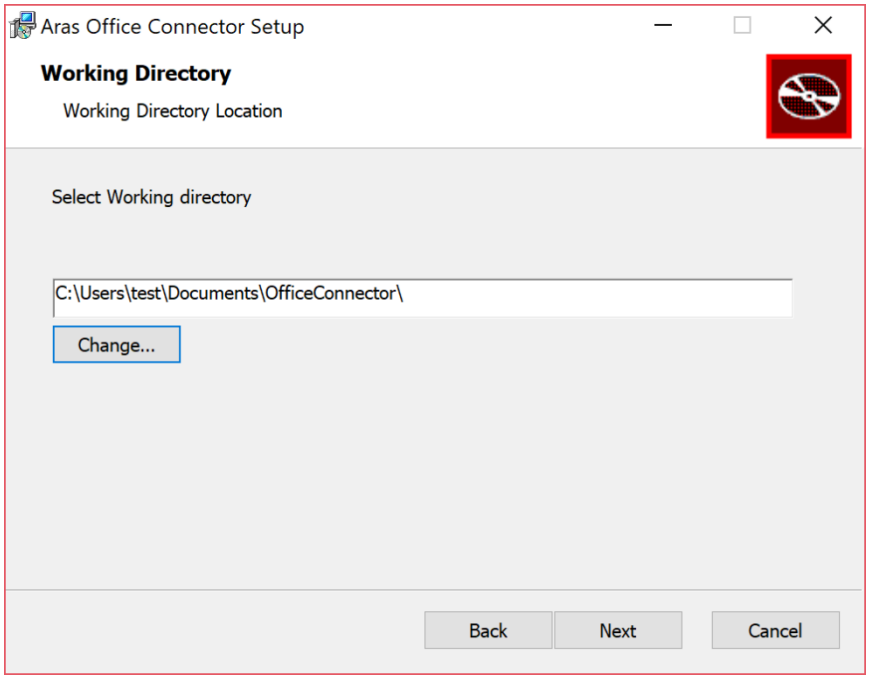
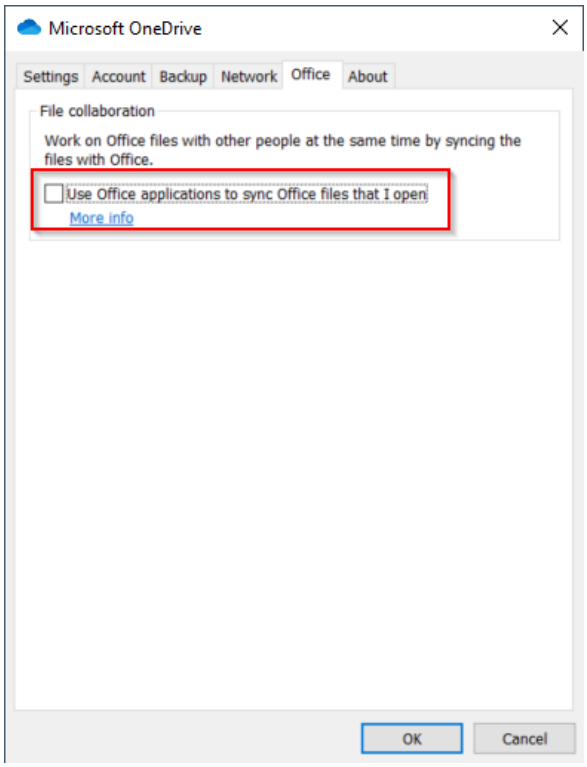
7. Specify the working directory that Aras Office Connector will use to download files locally.



Note: If choosing to use Microsoft OneDrive as the working directory, the option to **Use Office applications to sync Office files that I open** should be disabled as shown in the example here:



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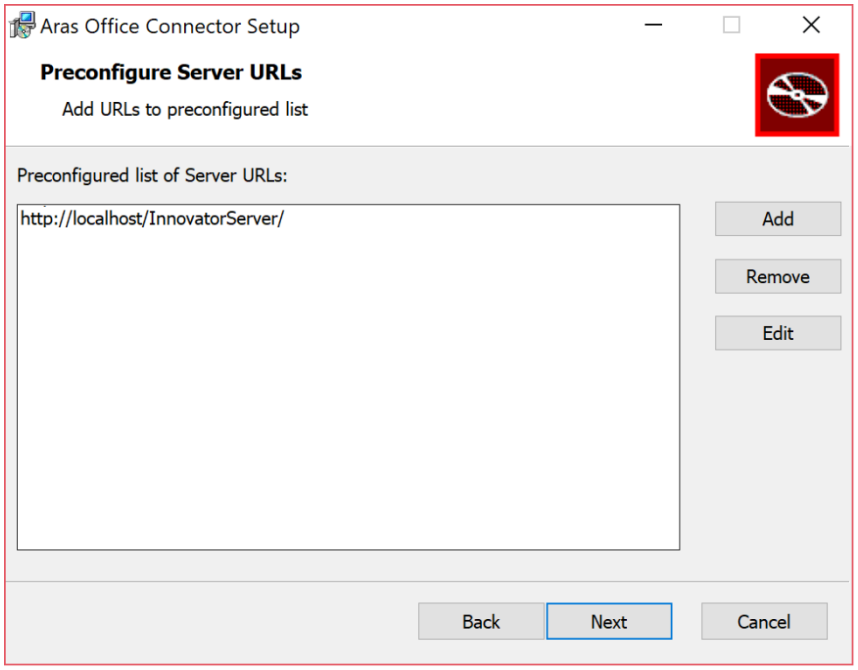
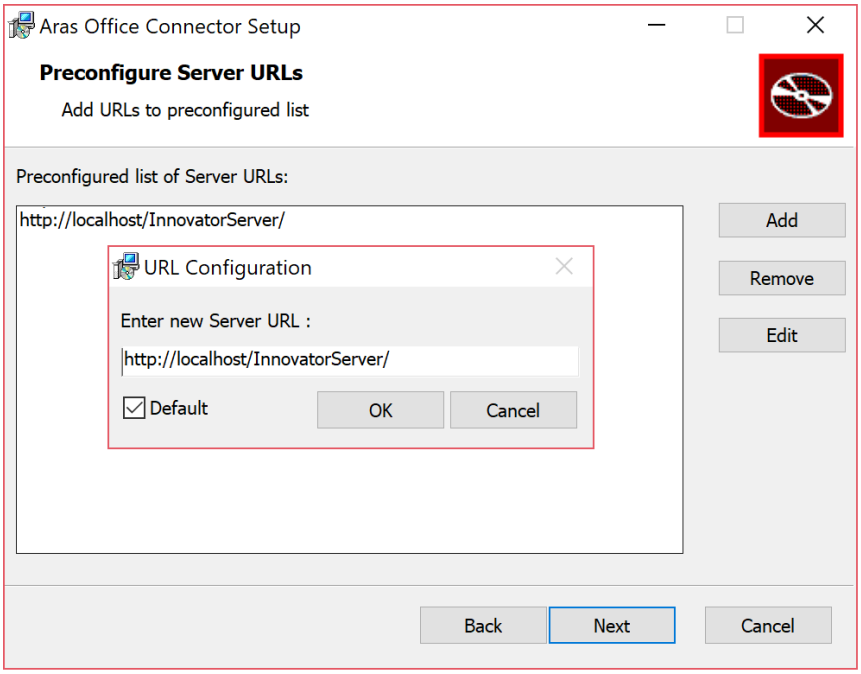
8. (Optional) Add any preconfigured URLs to connect to Aras Innovator.





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

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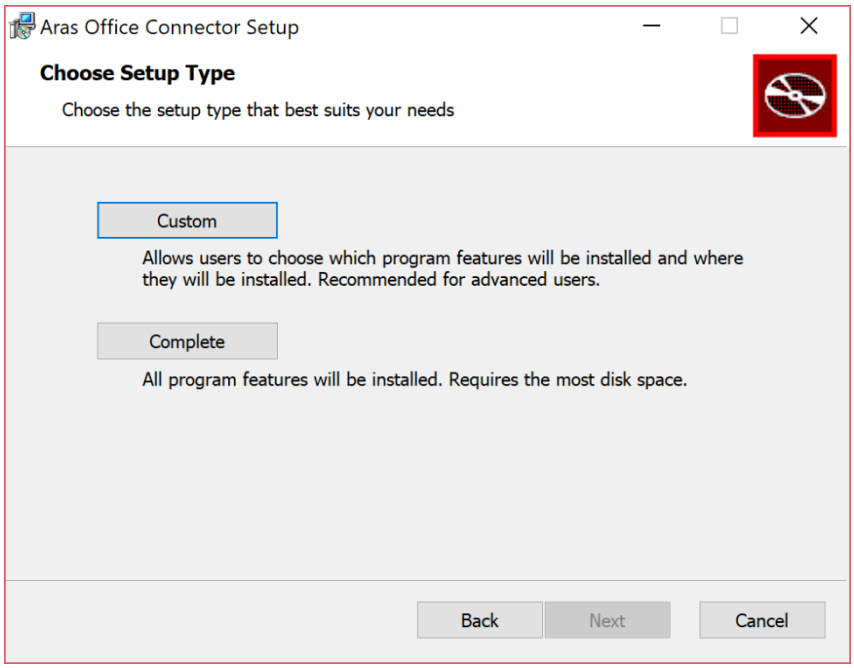
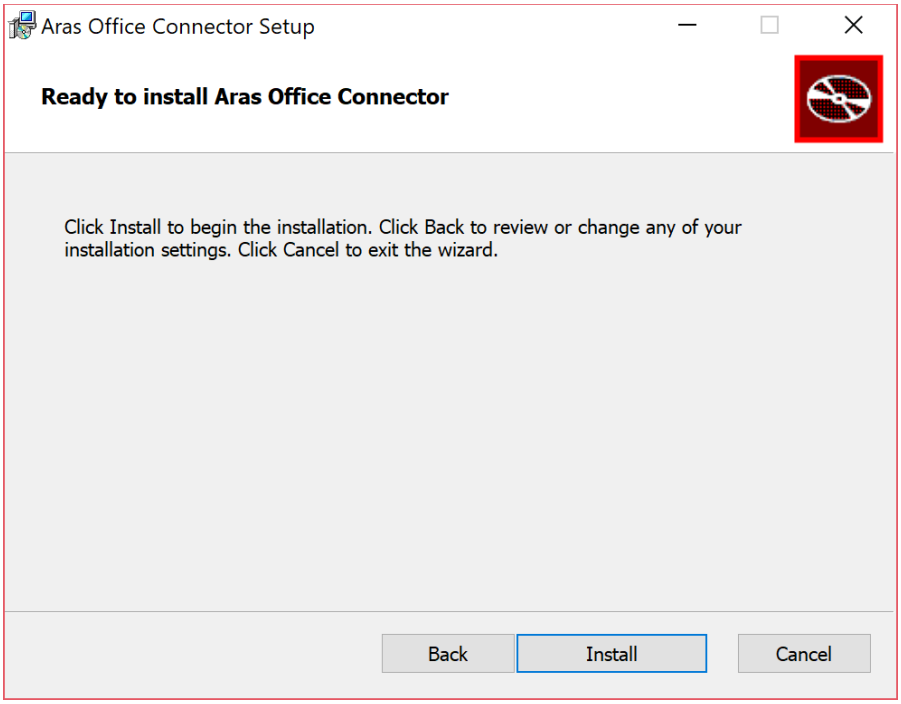
9. Specify **Custom** to select the MS Office applications where Aras Office Connector should be installed, or **Complete** to install the add-on on all MS Office Applications.



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



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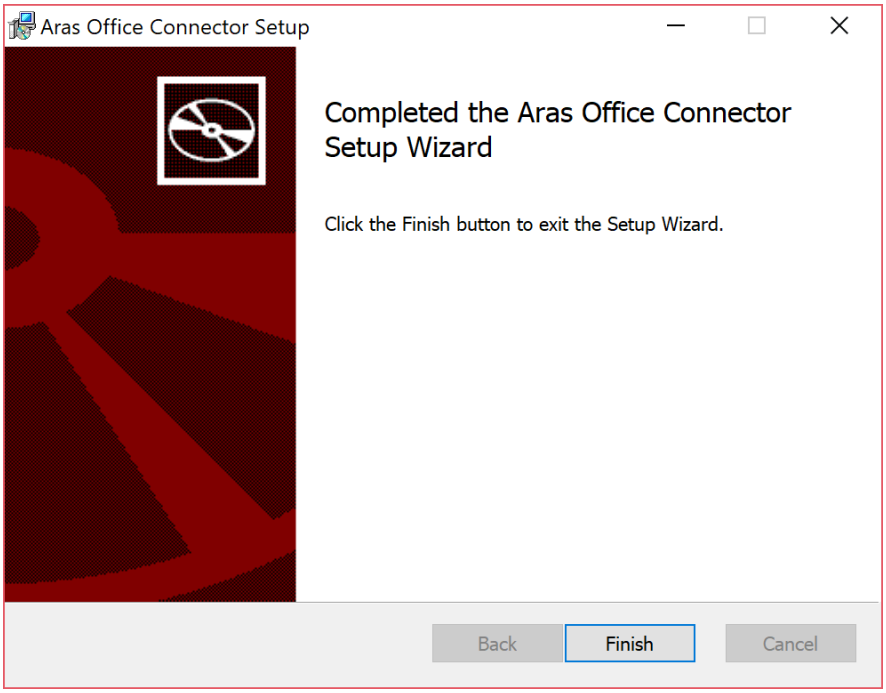
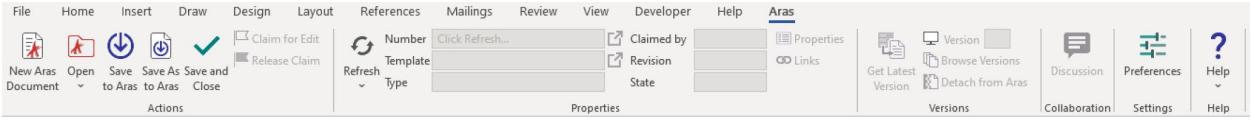
11. Click **Finish** to exit from the installation.



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.



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

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