Aras Office Connector 27

Upgrading from Release 14

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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 \rightarrow About.
- 3. Confirm that the dialog shows the following:
 - o 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



nt Settings Exit About			
Innovator Server Server: http://localhost/Innovato	rServer/		Login
Release settings Target Release: OC27	Description:	Upgrade to Aras Office Connector 27	
		1	
Manifest File Path: C:\Office Connectorilm; Available for Import V Select All Packages	orts\MSO_Standard_imports.mf	Existing Packages in the Database	



- 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:
 - o Microsoft Outlook
 - Microsoft Word
 - o Microsoft Excel
 - o Microsoft PowerPoint
 - o Microsoft Visio
- 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.

Rras Office Connector Setup	– 🗆 X
 Control of the second se	Welcome to the Aras Office Connector Setup Wizard
	The Setup Wizard will install Aras Office Connector on your computer. Click Next to continue or Cancel to exit the Setup Wizard.
	Back Next Cancel



- 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 inst	talled to %LOCA	LAPPDATA%\/	Aras Corpo	ration\	Aras
	Innovator Microso	oft Office (Connector\			
	Selecting the Install O	ffice Connect	or for all users	s changes th	e default	directory to
	C:\Program Files	(x86)\Aras	Innovator 1	Microsoft	Office	Connector\

Raas Office Connector Setup		—		×
Destination Folder				
Click Next to install to the default folder or	click Change to choose a	another.		S
Install Aras Office Connector to:				
C:\Users\test\AppData\Local\Aras Office Co	nnector∖			_
Change				
Install Office Connector for all users				
	Back N	ext	Cano	cel



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

🚰 Aras Office Connector Setup		_	
Working Directory Working Directory Location			Ð
Select Working directory			_
C:\Users\test\Documents\OfficeConnector\			
Change			
	Back	Next	Cancel

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:

	Account	Backup	Network	Office	About		
File co	llaboration	1					
			other peo	ple at the	same time	by syncing t	he
	vith Office.						
		plication	s to sync (Office files	s that I oper	ġ.	
M	ore info						



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

Prec	onfigure Server URLs						
	d URLs to preconfigured list					0	$\mathbf{\Theta}$
Preconfig	gured list of Server URLs:						
http://lo	calhost/InnovatorServer/					Add	
						Remove	
						Remove	
						Edit	
			Back	Next		Cancel	
		l					
/ 🕞 🕞	Office Connector Setup				_		×
	Office Connector Setup				_		×
Preco	Office Connector Setup Onfigure Server URLs I URLs to preconfigured list				-		×
Preco Add	onfigure Server URLs I URLs to preconfigured list				-		×
Preco Add Preconfig	onfigure Server URLs I URLs to preconfigured list ured list of Server URLs:				-	C	×
Preco Add Preconfig	I URLs to preconfigured list ured list of Server URLs: calhost/InnovatorServer/				-	Add	×
Preco Add Preconfig	onfigure Server URLs I URLs to preconfigured list ured list of Server URLs:			×	-	C	
Preco Add Preconfig	I URLs to preconfigured list ured list of Server URLs: calhost/InnovatorServer/			×	-	Add	
Preco Add Preconfig	I URLs to preconfigured list ured list of Server URLs: calhost/InnovatorServer/			×	-	Add	
Preco Add	I URLs to preconfigured list ured list of Server URLs: calhost/InnovatorServer/ URL Configuration Enter new Server URL :		Cancel		-	Add	
Preco Add	I URLs to preconfigured list URLs to preconfigured list URLs to preconfigured list URL Configuration URL Configuration Enter new Server URL : http://localhost/Innovat	corServer/	Cancel		-	Add	
Preco Add Preconfig	I URLs to preconfigured list URLs to preconfigured list URLs to preconfigured list URL Configuration URL Configuration Enter new Server URL : http://localhost/Innovat	corServer/	Cancel		-	Add	
Preco Add Preconfig	I URLs to preconfigured list URLs to preconfigured list URLs to preconfigured list URL Configuration URL Configuration Enter new Server URL : http://localhost/Innovat	corServer/	Cancel		-	Add	
Preco Add Preconfig	I URLs to preconfigured list URLs to preconfigured list URLs to preconfigured list URL Configuration URL Configuration Enter new Server URL : http://localhost/Innovat	corServer/	Cancel			Add	
Preco Add Preconfig	I URLs to preconfigured list URLs to preconfigured list URLs to preconfigured list URLs to Server URLs: Calhost/InnovatorServer/ URL Configuration Enter new Server URL : http://localhost/Innovat	corServer/	Cancel			Add	



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.

Aras Office Connector Setup - 🛛 🗙
Choose Setup Type
Choose the setup type that best suits your needs
Custom Allows users to choose which program features will be installed and where they will be installed. Recommended for advanced users. Complete
All program features will be installed. Requires the most disk space.
Back Next Cancel

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

Paras Office Connector Setup	—		×
Ready to install Aras Office Connector			Ð
Click Install to begin the installation. Click Back to review or change a installation settings. Click Cancel to exit the wizard.	ny of you	r	
Back Install		Can	cel



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

Ras Office Connector Setup		—		×						
Ð	Completed the Aras Office Setup Wizard	Conr	ector							
	Click the Finish button to exit the Setup Wizard.									
	Back Finish		Cance							

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.

	File	Home	Insert	Dra	W	Design	Layout	Reference	s Mailings	Review	View	Developer	Help	Aras					
	*) 🕑	പം	1	Claim f	or Edit	Ct Numb	er Click Refresh		2	Claimed by		Properties		Version			2
-	New Aras				ve and	Release	e Claim	Templ	ate		C	Revision		CO Links			Discussion	Preferences	Help
	Document		o Aras to					~ Туре				State			Version	Detach from Aras	01300331011	Freferences	~
			A	ctions							Properties					Versions	Collaboration	Settings	Help

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



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