

Upgrade ArchiOffice

Upgrading ArchiOffice

The following information walks you through the steps of converting your ArchiOffice data from previous versions to ArchiOffice and provides recommendations for post-conversion procedures to ensure data integrity.



The following information is for users who have already installed ArchiOffice. If you have not installed the software, see the [ArchiOffice Getting Started Guide](#). Mac users should start with the [Set Up Mac for ArchiOffice](#) whitepaper.

Points to Remember Before Upgrading to

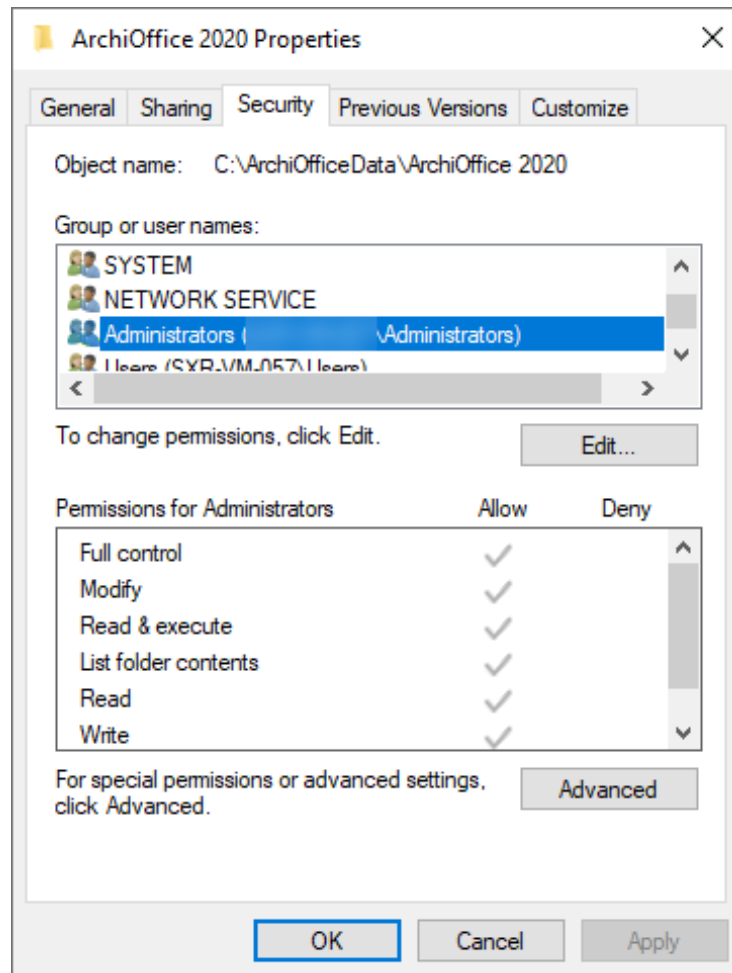
- You must identify which version of ArchiOffice you are using. You can find that on the bottom-center of the home page in v2010-2011. In the newer versions, this information is displayed on the top-center of the home page.
- Uninstalling previous ArchiOffice versions is not required. The previous version can reside and run on the same server as your 2012-2019 installation. We recommend the ArchiOffice upgrade be installed on the same server as the 2012-2019 installation.
- After the installation, restart your computer (server) for the proper installation of the software.
- The ArchiOffice installer does not modify the database files of the previous versions during the upgrade process; however, we do recommend backing them up prior to the upgrade.



Your ArchiOffice data is stored in an SQL database using either Microsoft SQL Server Standard or SQL Server Express. We highly recommend you to back up your database regularly and store multiple backup files on appropriate storage devices. You can back up the database using either Microsoft SQL Server Management Studio or a third-party program.

- During the data conversion process, your previous settings are migrated to the current version.
- Make sure all ArchiOffice users have logged out of the system prior to installation.
- Do not stop your current ArchiOffice server. The upgrade requires that to be running to locate the data for conversion.
- If you have older ArchiOffice custom reports (*.rpt) or invoices (*.rpc), they must be manually copied to the X:\Program Files (x86)\BQE Software\ArchiOffice2020\ ReportCenter\Reports\Custom\ folder (where X = your drive letter).
- If you have ArchiOffice 2018/2019 custom invoices or reports, they must first be converted to the latest format by our report writers. Please contact BQE Technical Support for assistance.

- Release security permissions to X:\Program Files (x86)\BQE Software\ArchiOffice 2020 for the Users group giving it Full Control-Allow. In addition, add Domain Users, if applicable.



Upgrading ArchiOffice

You need the following information to convert your old ArchiOffice data to:

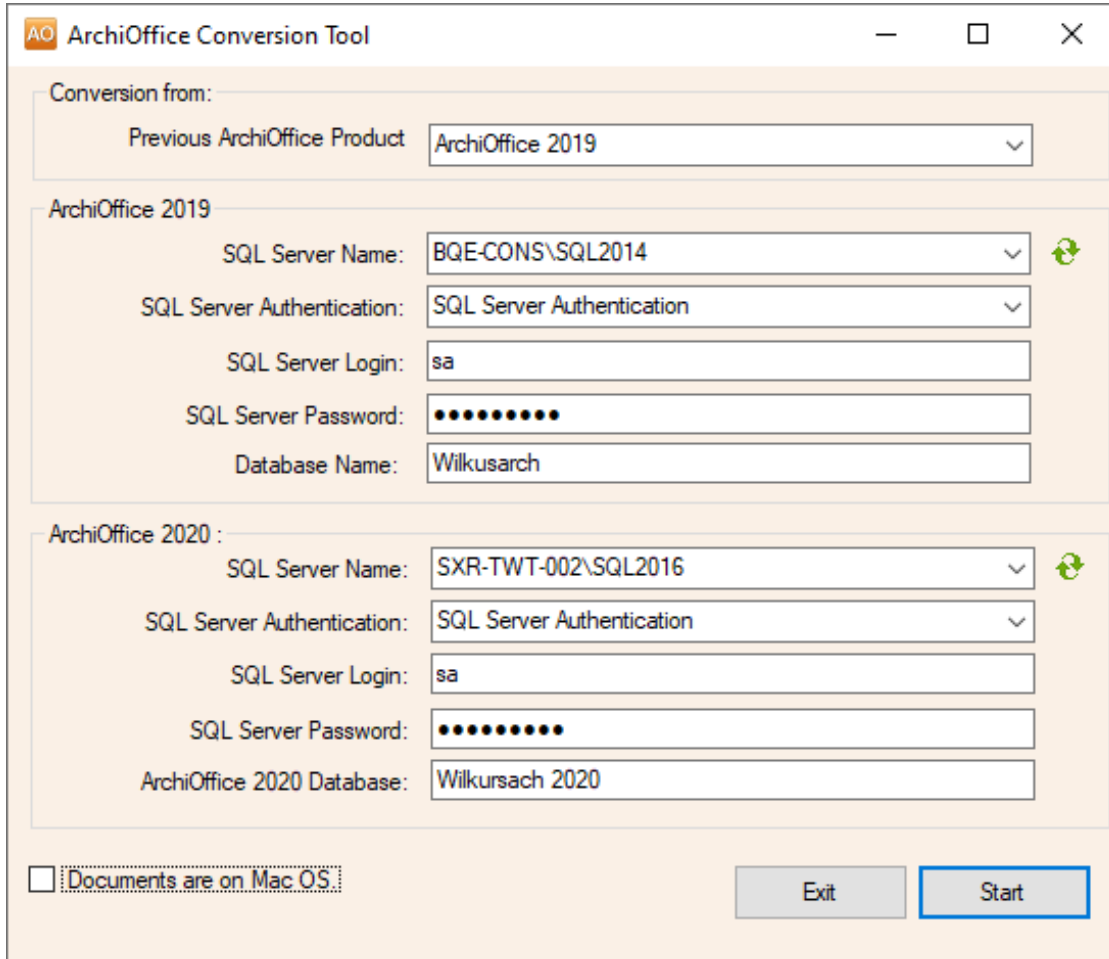
- SQL Server Name
- SQL Server login credentials (The login ID is always **sa** and that user's associated password)
- ArchiOffice Database Name

Do the following to convert your data from the older versions of ArchiOffice (2012-2019) to the latest one:

1. After you have completed the ArchiOffice installation, run the conversion tool. On the ArchiOffice server, select Start menu > All Programs > ArchiOffice 2020 > ArchiOffice Converter. The ArchiOffice Conversion Tool displays.




Run the ArchiOffice conversion tool as a Windows administrator. Right-click the tool's shortcut and select 'Run as administrator'. Click Yes on the confirmation screen.



The screenshot shows the 'ArchiOffice Conversion Tool' window. It has a title bar with the 'AO' logo and standard window controls. The main area is divided into sections. The 'Conversion from:' section has a dropdown for 'Previous ArchiOffice Product' set to 'ArchiOffice 2019'. Below this is the 'ArchiOffice 2019' section with fields for 'SQL Server Name' (BQE-CONS\SQL2014), 'SQL Server Authentication' (SQL Server Authentication), 'SQL Server Login' (sa), 'SQL Server Password' (masked), and 'Database Name' (Wilkusarch). There is a green refresh icon next to the SQL Server Name field. The 'ArchiOffice 2020' section has fields for 'SQL Server Name' (SXR-TWT-002\SQL2016), 'SQL Server Authentication' (SQL Server Authentication), 'SQL Server Login' (sa), 'SQL Server Password' (masked), and 'ArchiOffice 2020 Database' (Wilkusarch 2020). It also has a green refresh icon next to the SQL Server Name field. At the bottom left, there is a checkbox labeled 'Documents are on Mac OS'. At the bottom right, there are 'Exit' and 'Start' buttons.

2. Choose the version from which you are converting data.
3. If you are an ArchiOffice 2012 or later user, enter the name of the SQL server where your data is located, its login ID and password.
4. In the ArchiOffice 2020 section, enter the name, login ID and password of the SQL server to be used for the new ArchiOffice database.



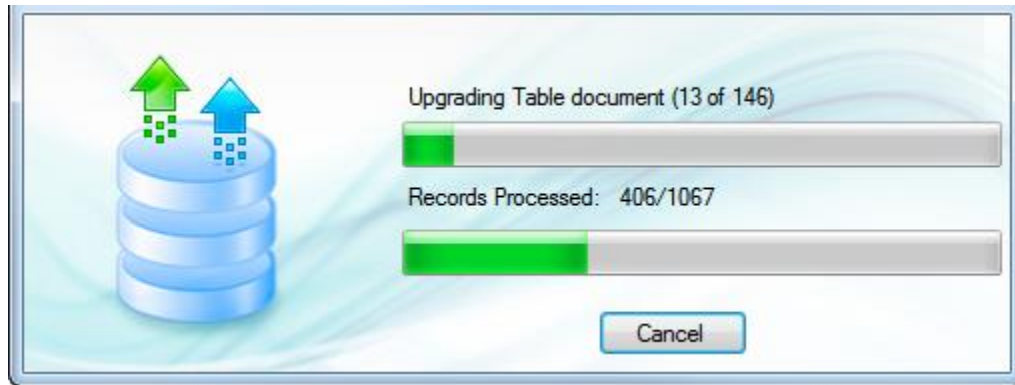
If you forgot the SQL server name, click the *Refresh* icon  next to the SQL Server Name field. It will populate the drop-down field with a list of detected SQL servers.


5. Enter the name for the new database.




Write the name down; you will need it to open the company database in the new ArchiOffice version.

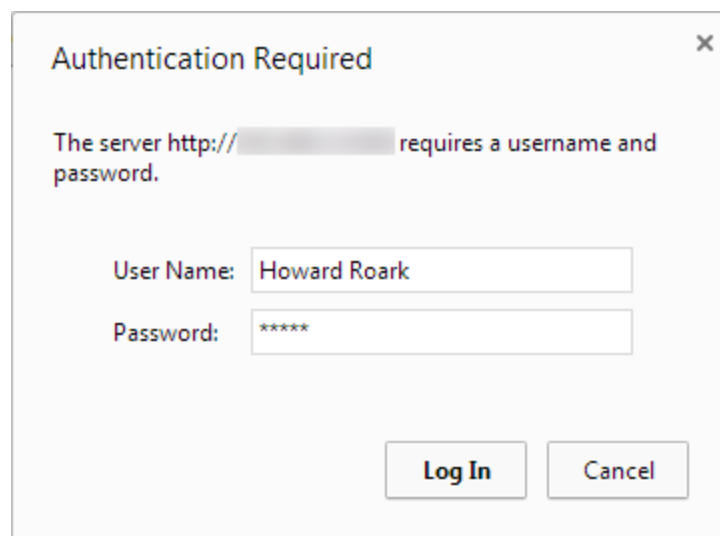
6. If your ArchiOffice-managed documents are stored on a Mac server, select the *Documents are on Mac OS* check box.
7. Click Start. You can see the progress of the data conversion.



 ArchiOffice creates a log file containing details of the conversion process. When the conversion is completed, you will be shown the path to the log file for viewing.

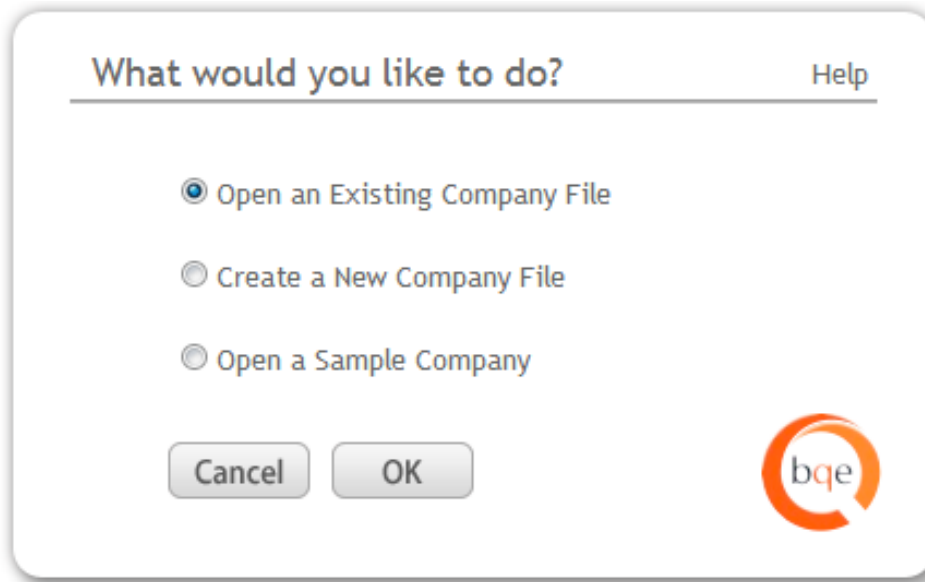
 If you need further guidance in setting up ArchiOffice, [please visit our website's Support page](#). If you are experiencing any issues, we will be glad to schedule a call and help you resolve them. For technical Support, please call (310) 602-4030 or email support@ArchiOffice.com.

8. After the data conversion is completed, start ArchiOffice and click Admin Options on the login page. You might be prompted with a Windows Administrative login; if so, enter it.

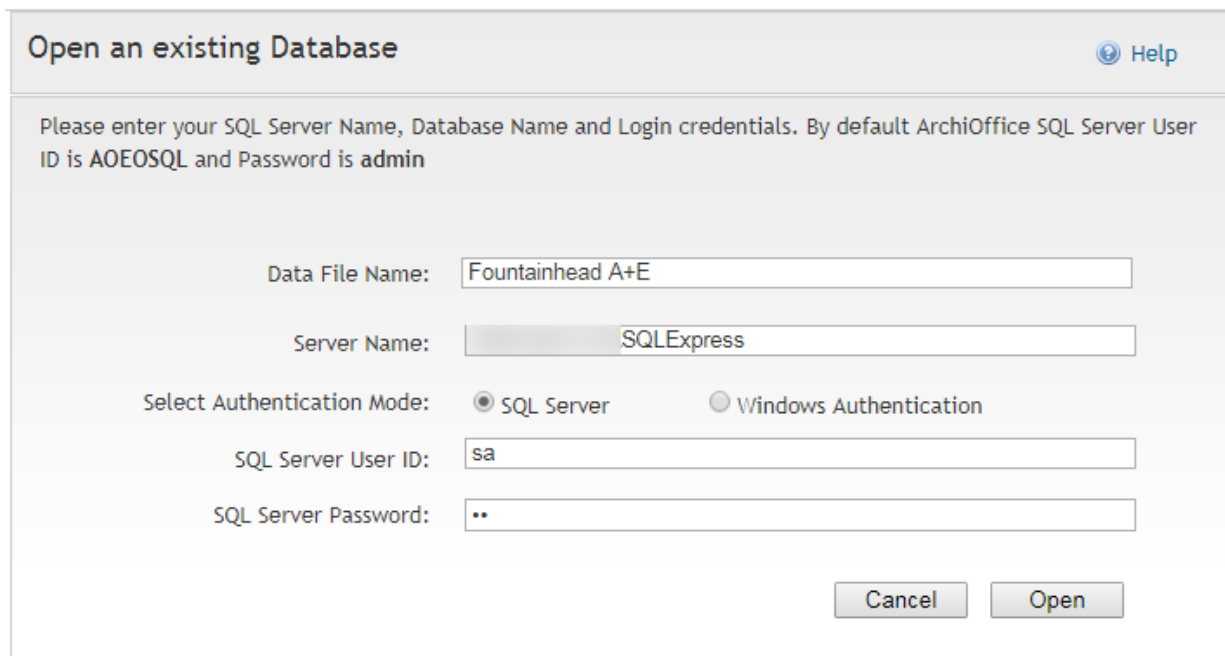


9. Next, you will be prompted with the 'What would you like to do?' dialog box.

10. Select Open an Existing Company File. Make sure your web server can connect to your SQL Server Express or SQL Server Standard database program.

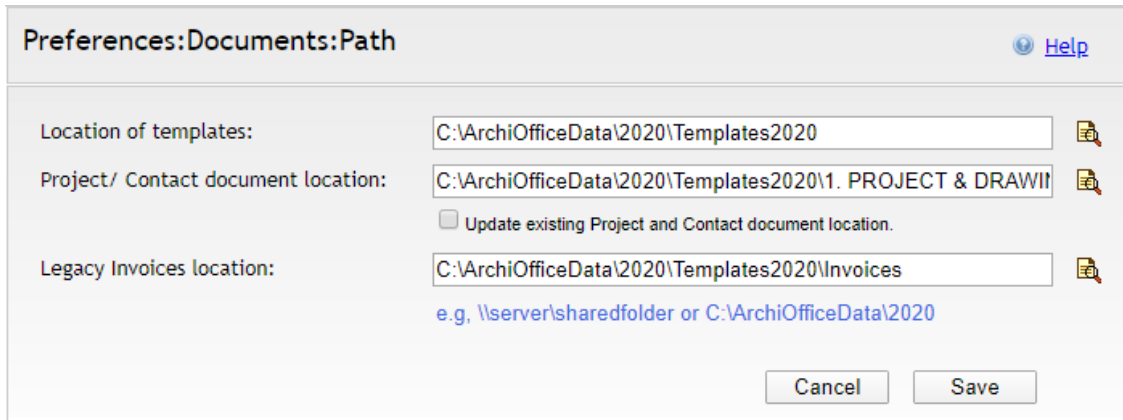


11. Enter the login details for your new company database and click Open.



We recommend using the SQL Server option. If you must use the Windows Authentication option, have your IT/System Administrator handle it for you.

12. Next, you have to provide the path in the Preferences screen where your project templates and documents are stored.



By default, the ArchiOffice installer sets the path as X:\ArchiOfficeData\2020\ where X: is the physical drive on which IIS is installed. However, you must enter the specific path or location of these shared folders in the UNC format (\\ServerIPAddress\sharedfolder\ or \\192.168.4.5\AO2020_Docs).



See the KB article on How Do I Set the UNC Path for ArchiOffice Documents. If your documents are on a Mac file server, check the Knowledge Base article on how to handle that.

You can also specify the path of your old invoice folder in the Legacy Invoices field. This is used to view a converted invoice in the original PDF layout instead of rendering it in the Crystal Reports window. Click Save.

Next, you will be prompted to log in.

13. If you want to prevent users from accessing your previous ArchiOffice installation, select Start menu > All Programs > ArchiOffice 20xx Stop ArchiOffice Application Server.

ArchiOffice V8 Users

ArchiOffice V8 users cannot upgrade directly to the new version. For a pain-free transition to ArchiOffice, we highly recommend using our Data Conversion Services. Our Conversion Team will migrate or convert your v8 data files and return them to you in the ArchiOffice format.



To get more information on BQE Conversion Services for upgrading from ArchiOffice v8 to the latest ArchiOffice version, please contact us at (310) 602-4030 or support@ArchiOffice.com.



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