

Upgrade Process

This section walks you through applying the Aras Innovator 40 Patch to Aras Innovator Releases 14 or newer. Aras recommends you do a test run of this upgrade on a non-production instance, before attempting this upgrade on your production system.

Upgrading Innovator Server

Upgrading the production instance of Aras Innovator should be done with planning of a short timetable, and an ability to back out the upgrade if something in the process unexpectedly fails.

The following sections are a rough outline of the steps used when upgrading the Aras Innovator production instance.

<DB-Connection... to <xDB-Connection

Notification and Backup

1. Notify users that 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.

Important

It is best to give at least 24 hours of notice, as well as a reminder 15 minutes prior to the upgrade.

2. Back up the code tree:

The 'Code Tree' refers to files and folders installed to the disk when Aras Innovator was first installed. The default path for the Code Tree installation would be something similar to:

C:\Program Files (x86)\Aras\Innovator With the following contents:



Name	Type	Size
AgentService	File folder	
ConversionServer	File folder	
DB	File folder	
Innovator	File folder	
OAuthServer	File folder	
SelfServiceReporting	File folder	
Tools	File folder	
VaultServer	File folder	
ConversionServerConfig	XML File	5 KB
InnovatorServerConfig	XML File	8 KB
SelfServiceReportConfig	XML File	1 KB

You can

confirm the installation folder with the following steps:

1. From the Start Menu, select Start --> Control Panel.
2. From the Control Panel, select Programs and Features.
3. Right-click on the 'Name' column header and select More...
4. Select the Comments header if it is not checked Click OK.
5. Search for the Aras Innovator entry in the Programs and Features window.
6. View the value set in the Comments column for the Aras Innovator entry:

Uninstall or change a program

To uninstall a program, select it from the list and then click Uninstall, Change, or Repair.

Organize ▾ Uninstall					
Name	Publisher	Installed On	Size	Version	Location
 Aras Innovator	Aras Corporation	11/24/2021	0.98 GB	14.0.0	C:\Program Files (x86)\Aras\Innovator\

Once you have determined where the code tree is installed, you would want to back up the folder and all of its contents.

3. Disconnect all users from the database.

The easiest way to prevent client sessions from committing any further changes to the database is to change the database connection string in the InnovatorServerConfig.xml from



4. Backup the database.

Place this file in a safe location, as it is necessary when you restore from it, if the upgrade fails.

5. Enable database connections.

After your database backup has completed, you can enable the database connection string in the InnovatorServerConfig.xml by simply changing it from

Upgrade Process

The Upgrade Process is handled by the Aras Update tool. But it has to be run locally on each server where an Aras Innovator component is installed.

Important

Before starting the upgrade procedure, confirm all code tree and database components are backed up as described in the section above.

1. Copy and unzip the Aras Innovator 40 Patch.zip file on the server.
2. Launch Aras Update tool as administrator.
3. Click on the **Local** button.



Online

Local

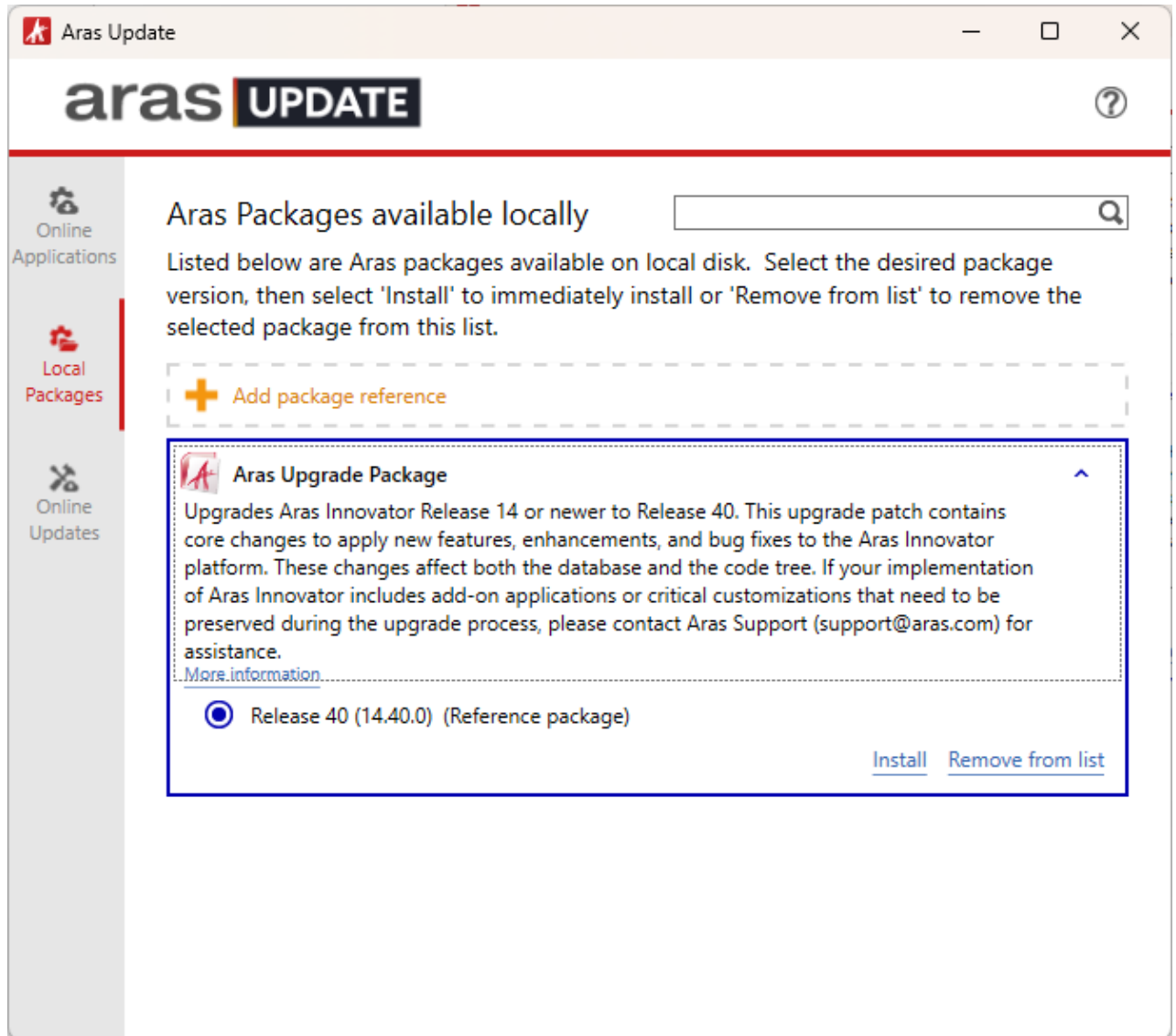
Aras Packages available online



Listed below are all Aras packages available online. Select a desired package version, then pick Download to download for later installation, or Install to immediately download and install. Aras subscriber-only features such as Service Packs are not listed here, to install them you must first download them from the Aras FTP site and then use the Local view on the left to add the package reference for installation.

	Aras Technical Documentation	▼
	Aras Process Quality Binding	▼
	Aras Program Management	▼
	Aras Quality Management System	▼
	Aras Requirements Engineering	▼
	Aras Component Engineering	▼
	Aras Product Engineering	▼

4. Add reference to the unzipped Aras Innovator 40 Patch folder.
 1. Click on **+ Add package reference**.
 2. Select the top-level folder containing the patch and click **OK**.
 3. Aras Upgrade Package should be added as shown.



5. Click on the **Install** button.

6. Select appropriate installation components from the listed modules and click the **Next** button.

- ☒ Upgrade Aras Innovator Server
Apply over Innovator Server directory
- ☒ Upgrade Aras Vault Server
Apply over Vault Server directory
- ☒ Upgrade Aras OAuth Server
Apply over OAuth application directory
- ☒ Upgrade Aras Innovator Database
Import in Innovator Database
- ☒ Upgrade Aras Conversion Server
Apply over Aras Conversion Server directory.
- ☒ Upgrade Aras Agent Service
Apply over Aras Agent Service directory.

Back

Next

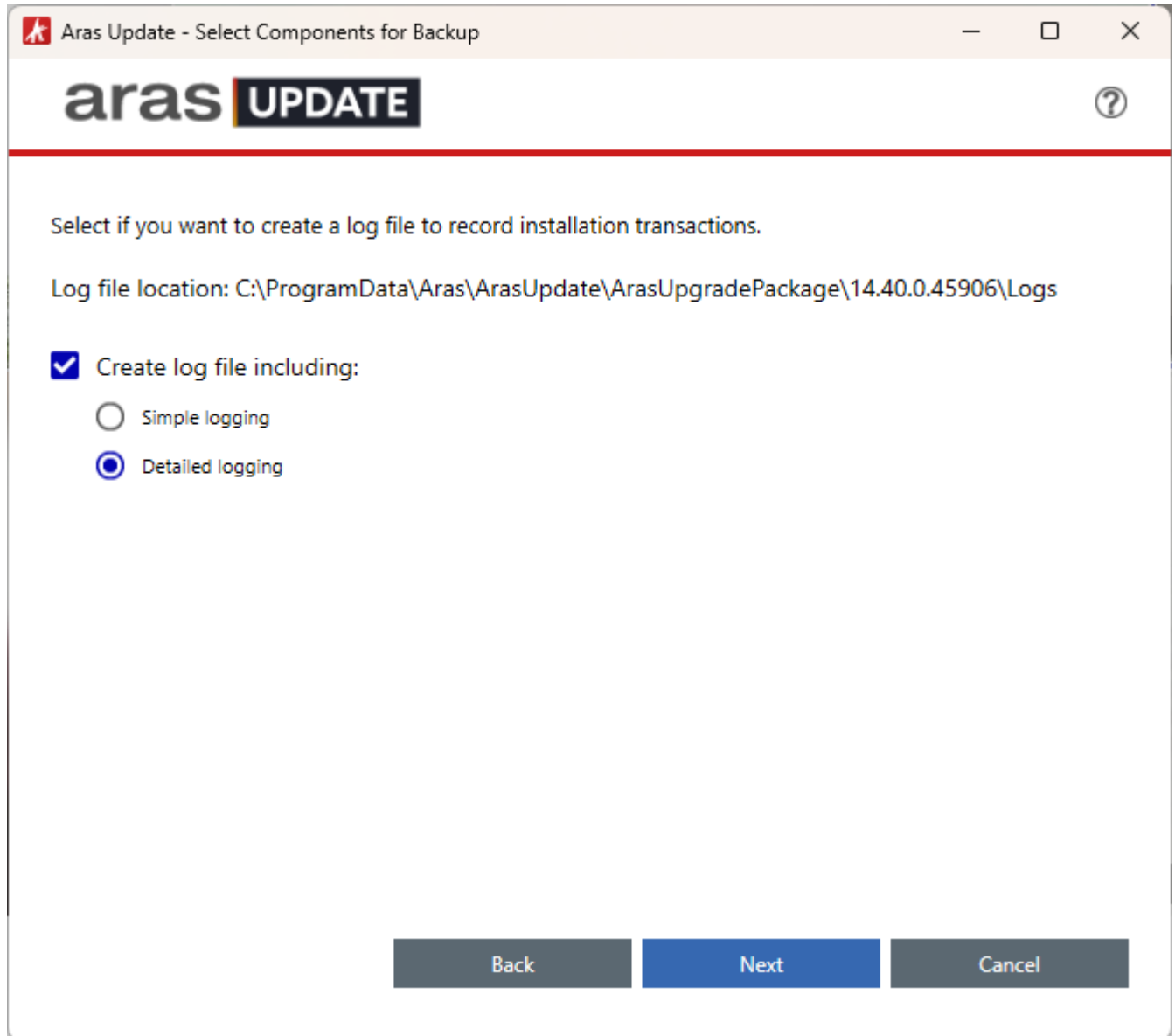
Cancel

Important

The code tree upgrades will only work correctly if the components are installed locally. Database can be upgraded from any machine that can make a successful http connection to Aras Innovator application.

7. Select the **Detailed Logging** option and then click **Next**.





8. If updating a code tree components, specify the path to the top-level Innovator folder as shown in example below and click **Install**.



Enter the following parameters for each component you are going to install and then click Install button to continue.

✓ Upgrade Aras Innovator Server

Path to the common directory where Aras Innovator components are installed

C:\Program Files (x86)\Aras\Innovator

Browse...

✓ Upgrade Aras Vault Server

Path to the installed Vault Server

C:\Program Files (x86)\Aras\Innovator\VaultServer

Browse...

✓ Upgrade Aras OAuth Server

Path to the installed OAuth Server

C:\Program Files (x86)\Aras\Innovator\OAuthServer

Browse...

Server URL

http://localhost/InnovatorServer

Upgrade Aras Innovator Database

✓ Upgrade Aras Conversion Server

Path to the installed Conversion Server

C:\Program Files (x86)\Aras\Innovator\ConversionServer

Browse...

✓ Upgrade Aras Agent Service

Path to the installed Agent Service

C:\Program Files (x86)\Aras\Innovator\AgentService

Browse...

Back

Install

Cancel

The installation process should run and complete successfully.

9. If updating the database, specify the following information:

Field	Value
Server URL	URL address for Aras Innovator
Database	Name of the database to be updated

Username	Must be root
Password	Password for root user
SQL Instance	Name of the SQL Server instance where the database is installed
SQL Database Name	Name of the database to be updated
DBA Login Name	DB admin user with ALTER DATABASE permissions (default: sa)
DBA Password	Password for DB admin user (default: sa)



Enter the following parameters for each component you are going to install and then click Install button to continue.

✓ Upgrade Aras Innovator Database

Server URL

Database

Username

Password

SQL Instance

SQL Database Name

DBA Login Name

DBA Password

The import process should run and complete successfully.

Important

Remember to disable the **root** user after the import is complete.

10. Repeat steps above for all modules as needed until all components of Aras Innovator are upgraded successfully.

Important

If any part of the process fails, or if manual upgrade steps are required, contact Aras Support at support@aras.com.

Upgrading Aras Visual Collaboration

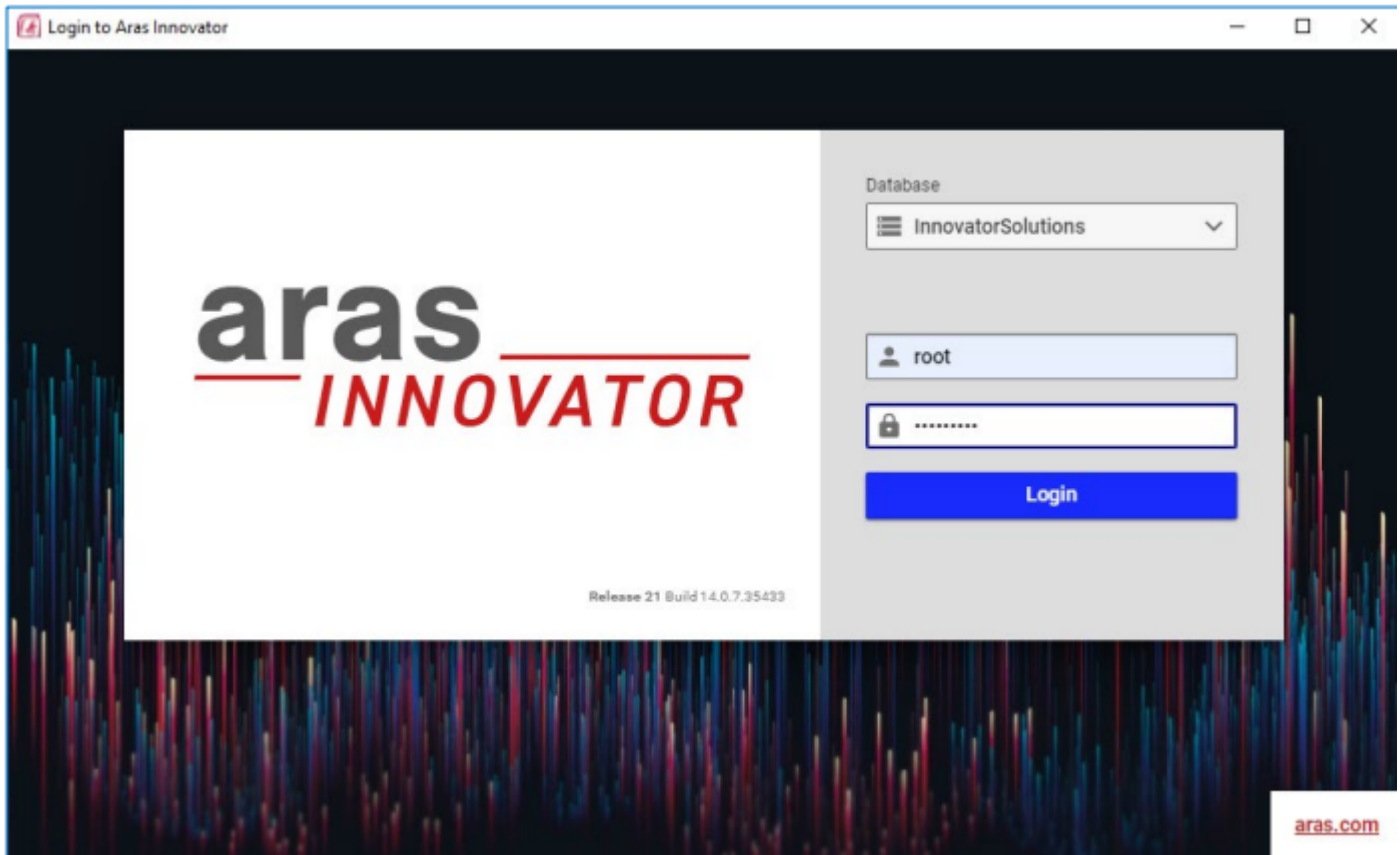
If your previous version of Aras Innovator had Aras Visual Collaboration enabled, you must update it to include the Aras2DPdfViewer package. Use the following procedure to upgrade Visual Collaboration: Confirm that a current version of the Aras.PDFViewer Feature license is activated in the database:

1.
 1. Log into Aras Innovator as an administrator.
 2. Go to **Administration\FeatureLicenses** in the TOC and do a search for “Aras.PDFViewer” license.
 3. If the license is not found, subscribers can request a license from licenses@aras.com.
2. Unzip the **ArasPDFViewer.zip** file found in CD Image\Utilities\ folder.
3. Import the database package with the Package Import Export Utilities. For more information on using this tool, refer to the Aras Innovator 40 - Package Import Export Utilities documentation.
 1. You need to enable the “Super User” login to perform this step.
 2. Browse to the \PackageImportExportUtilities\Import\ folder and run the Import.exe file



4. Enter a connection URL for a given Aras Innovator instance in the Server field. By default, it is `http://localhost/InnovatorServer/`.
5. Click the Login button. The Login to Aras Innovator dialog box appears.





6. Specify the connection information for the given Aras Innovator instance:
 1. **Database:** a name of a target Aras Innovator database. By default, it is **InnovatorSolutions**.
 2. **Username:** **root**.
 3. **Password:** a password for the **root** User. By default, it is **innovator**.
7. Click the **Login** button. Aras Package Import should have successfully connected to the given Aras Innovator instance.
8. Specify the connection information for the PDF Viewer installation modules:
 1. **Target Release** = 40
 2. **Description** = PDF Viewer
 3. **Manifest File Path** = The manifest is found in the folder CD
Image\Utilities\ArasPDFViewer\Imports
 4. **Available for Import** = Check PDFViewer
 5. **Type** = Merge
 6. **Mode** = Thorough Mode
9. Click Import to start the utility.

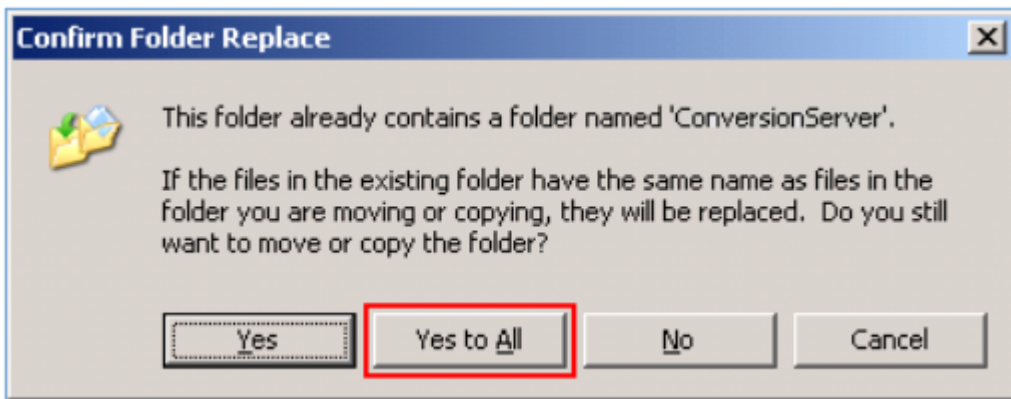


10. After the import has been completed, disable the **SuperUser** user.

Upgrading HTML to PDF Converter

If your previous version of Aras Innovator had HTML to PDF Converter enabled, you must upgrade it as well.

1. Copy the Aras HTML to PDF Converter package to a local drive on the Conversion Server.
This Aras HTML to PDF Converter folder is in the Utilities directory of the Aras Innovator CD Image on the [Aras MFT](https://mft.aras.com/InnovatorLatestRelease/) website (<https://mft.aras.com/InnovatorLatestRelease/>)
2. Copy the 'ConversionServer' folder to the root directory where the Conversion Server was installed, overwriting the existing 'ConversionServer' folder and its contents.



3. Restart IIS.

Upgrading separately installed OAuth Server

If the OAuth Server has been installed separately, an additional action might be required to complete the upgrade process. Please pay attention to the warning message inside the Aras Update log file – it will contain all necessary steps to copy the required certificates. Note that these steps should be followed regardless of the OAuth and Innovator statuses being marked as "successful". Here is an example from the log file:

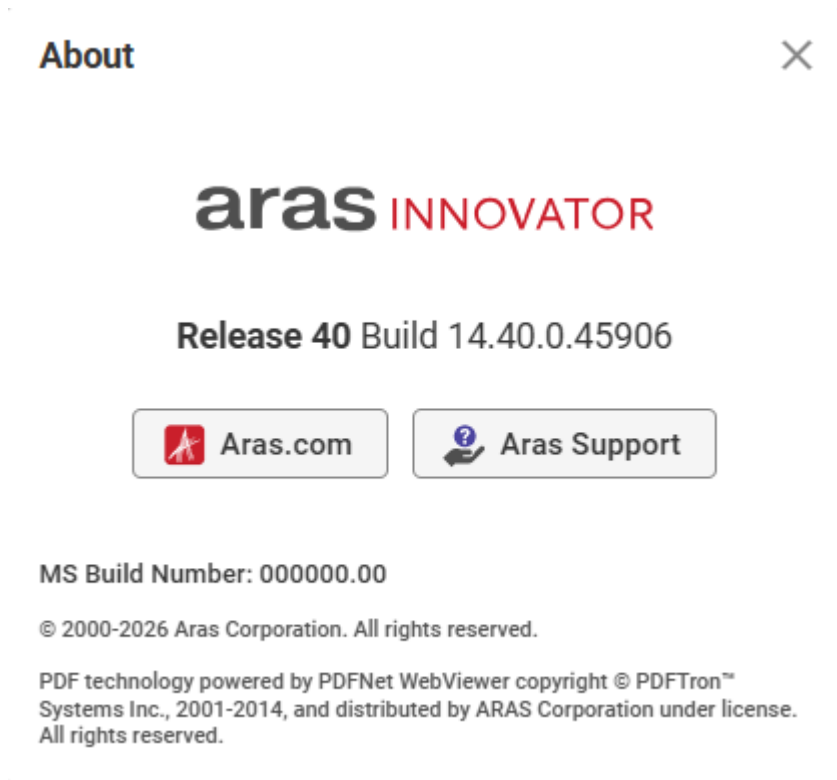
```
[INFO ] (14) - --- !!! WARNING !!! ---  
[INFO ] (14) - OAuthServer certificates have not been found. To finish configuration of the new certificates please perform the following steps:  
[INFO ] (12) - 1. Copy the OAuthServer.cer file to the Target certificates folder (E:\Aras\Innovators\14oauth\Innovator\Client\App_Data\Certificates).  
[INFO ] (12) - 2. Copy the InnovatorClientServer.cer file to the OAuthServer certificates folder (OAuthServer/App_Data/Certificates).  
[INFO ] (12) - --- !!! WARNING !!! ---
```

Confirming the Patch

Use the following steps to check if your code tree and database have applied the upgrade to Aras Innovator 40.

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:

Aras Innovator Release 40 Build 14.40.0.45906



4. Click OK.
5. From the TOC, select **Administration --> Variables**.
6. Confirm that following variables are listed:

Name	Value
VersionMajor	14
VersionMinor	40
VersionServicePack	None
VersionServiceUpdate	0



If any part of this test fails, revert to your backups and contact Aras Support at Support@aras.com .

Testing Your Upgrade

Aras recommends you test any critical functionality before going live with any upgrade

1. Test critical functionality
2. Test the vault
 - Add a new file, view that file, and finally delete that file.
 - View existing file from prior to the upgrade.
3. If all tests are satisfactory, notify users the system is running again.

