

# Upgrading from ArchiOffice V8 To ArchiOffice 2011

A Whitepaper

If you are an existing ArchiOffice user, you can upgrade to the new ArchiOffice 2011 version. Before you begin the upgrade process, you must download and install ArchiOffice 2011 (see the [ArchiOffice Getting Started Guide](#) for details). **If you have previously installed ArchiOffice and experienced problems, please un-install it and re-install the latest build.**



If you want, we can perform the upgrade process for you and return your files ready-to-run. Please contact us at (800) 371-0130 (ext#0) or [support@ArchiOffice.com](mailto:support@ArchiOffice.com) and we will schedule a convenient time to complete this upgrade.

Only existing ArchiOffice users should perform this upgrade. You **must be using ArchiOffice v8.9.6** before upgrading to ArchiOffice 2011. (If you are not at v8.9.6, please [download a free update](#) or contact us at [support@ArchiOffice.com](mailto:support@ArchiOffice.com).) Before upgrading, you **must** finalize all your invoices and complete any accounting export to ensure data integrity.



All invoices that have not been finalized, including draft invoices, will be lost during the conversion process.

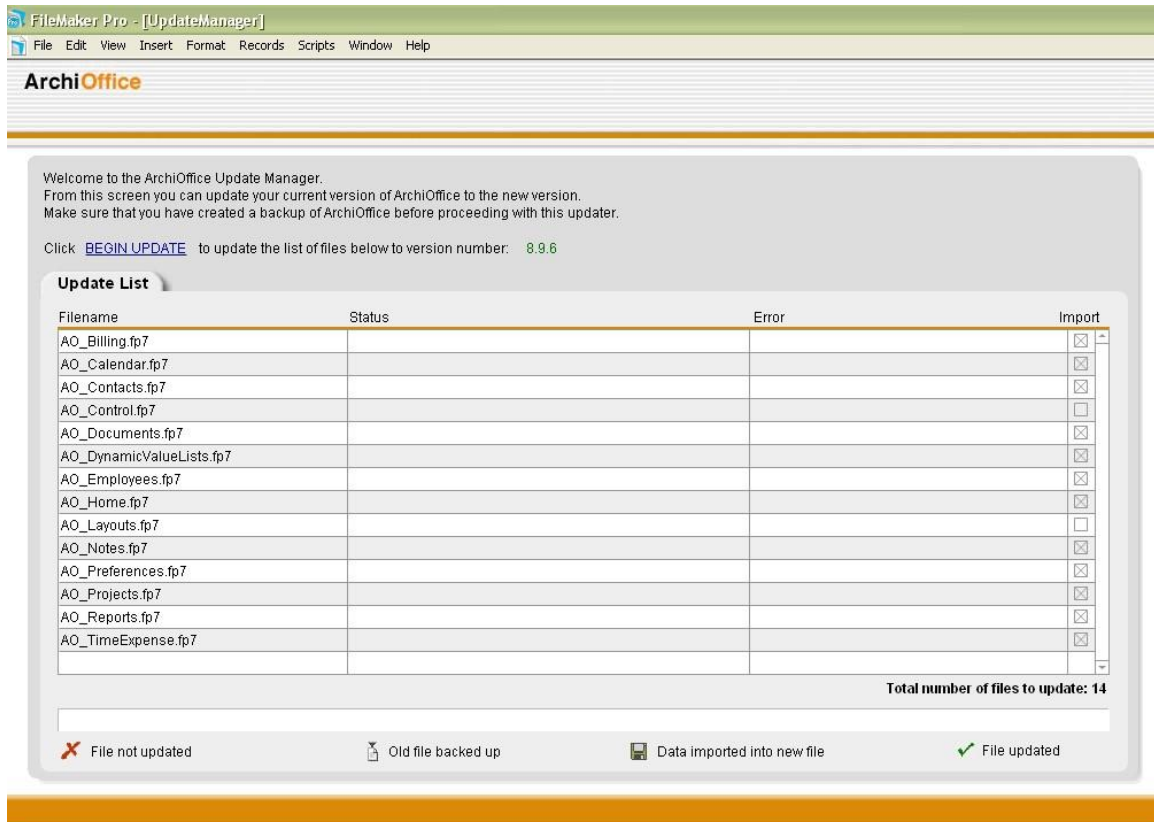
As a general overview of this process, the upgrade takes the data from ArchiOffice v8.9.6 and exports it as comma-delimited files, loads the data into a *staging* database, cleans the data, and then imports it into the new ArchiOffice 2011 database. Exporting data from File Maker Pro v8.9.6 does not affect the FMP v8.9.6 files. These files are not modified in any way and hence will run normally. During the process, a conversion.log file is generated in the ArchiOffice Exports folder (see *instructions below*) that documents the duration of each step as well as any errors that were encountered in the process.



The duration of the upgrade process depends on the speed of your processor and how much data you have in ArchiOffice V8.9.6. On an average, it takes about 10 minutes, typically varying from 30 minutes for an average office to 4 hours for a large office.

To upgrade from your old ArchiOffice version to ArchiOffice 2011:

1. Update ArchiOffice to version 8.9.6. Please [download a free update](#) or contact us at [support@ArchiOffice.com](mailto:support@ArchiOffice.com).



2. Stop FileMaker Server and back up the ArchiOffice folder located at:

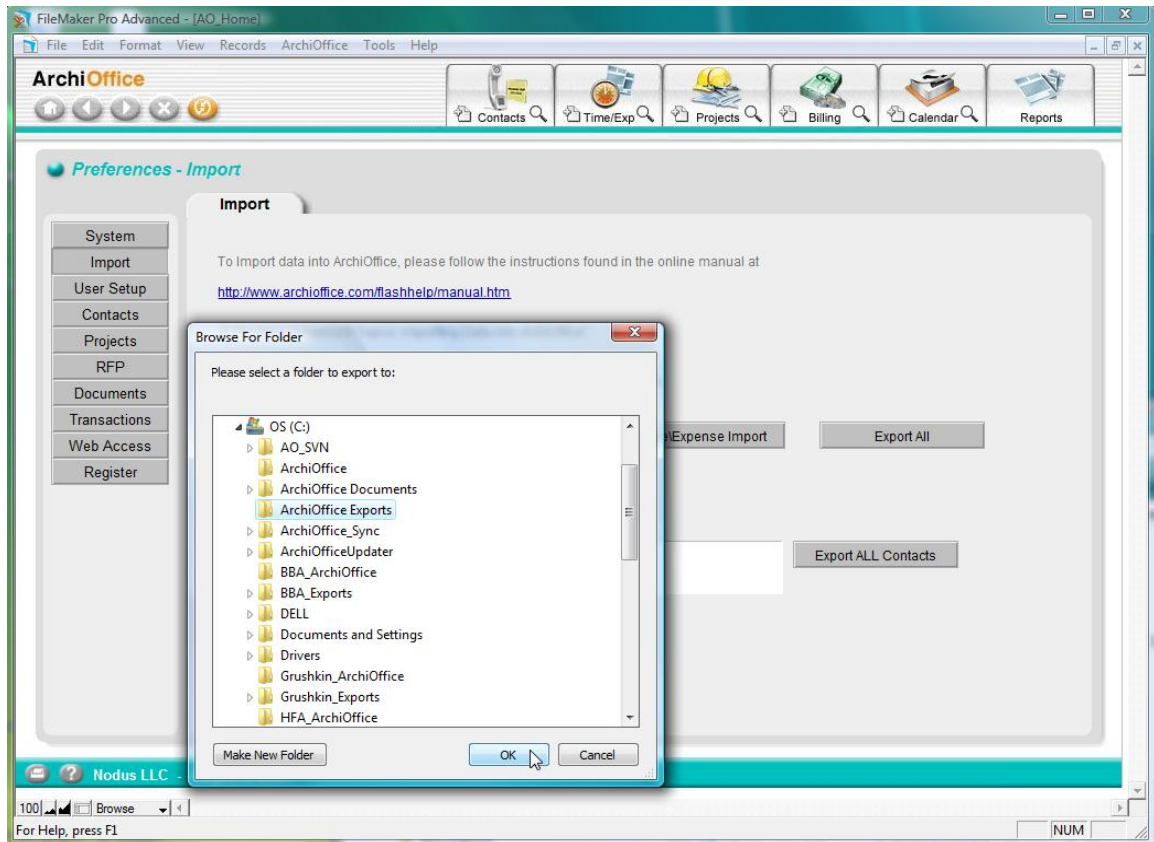
C:\Program Files\FileMaker\FileMaker Server\Data\Databases (for PC users)  
 Root:Library:FileMaker Server:Data:Databases:ArchiOffice (for Mac users)



If you are a single user or P2P, quit ArchiOffice and back up your ArchiOffice folder found on the hard drive of the host computer.

3. Create a folder called 'ArchiOffice Exports' on your hard drive (e.g., C:\ArchiOffice Exports or HD:ArchiOffice Exports). This folder will be used to store data exported from ArchiOffice v8.
4. Open ArchiOffice v8 application and verify whether you are updated to 8.9.6 (version number displays at the bottom of the Home screen).
5. Go to Preferences-Import screen and click the Export All button. (**DO NOT click the Export All Contacts button.**)

- Browse and point to the folder created in step 3 for your export files. If you receive any message informing you that the container fields cannot be exported, click OK to dismiss it.

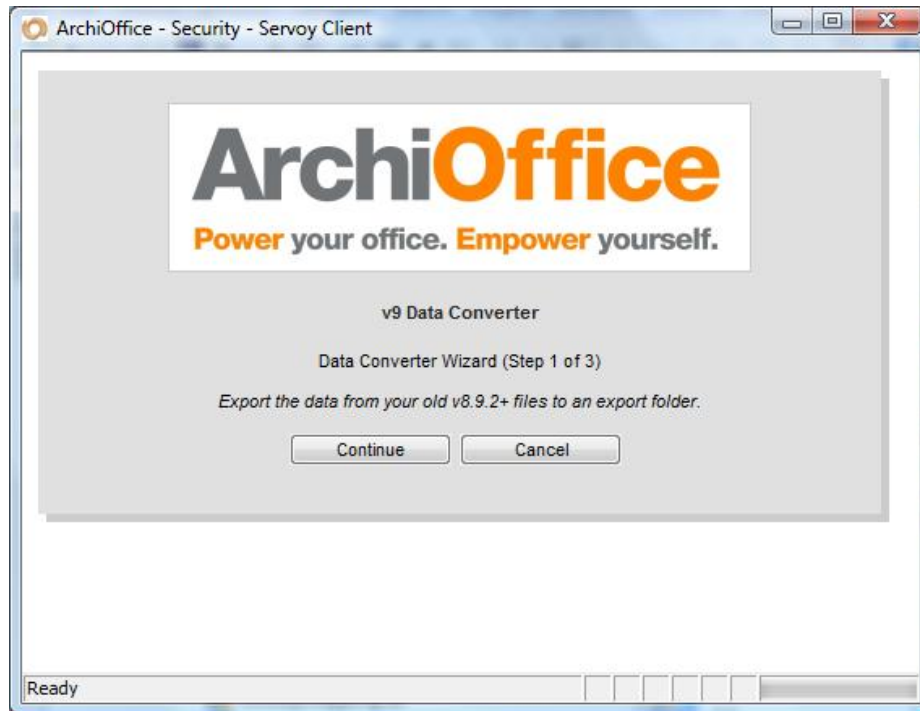


- Now quit ArchiOffice v8.9.6 application. Make sure to create a backup of the export file/directory so that you can try the upgrade again, if required.
- Open ArchiOffice 2011 using the desktop shortcut (you must have already installed and licensed the new version). Else, find ArchiOffice 2011 Server computer's IP address and type the following in the address bar of your internet browser:

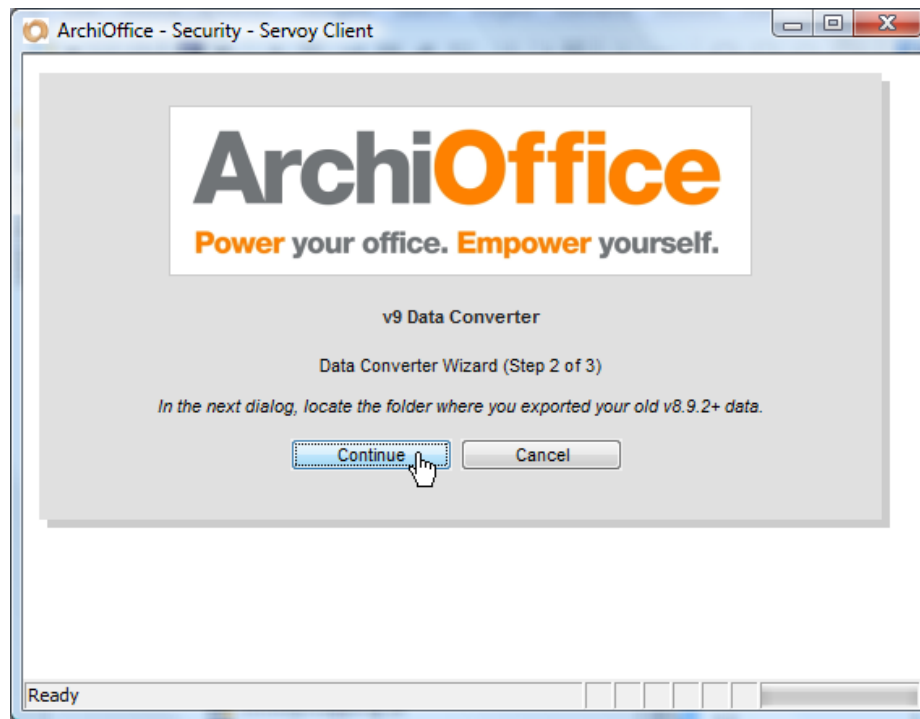
[http://\[ServerIPAddress\]:8081/servoy-client/ArchiOffice.jnlp](http://[ServerIPAddress]:8081/servoy-client/ArchiOffice.jnlp)

- The ArchiOffice 2011 Client application will download and run. If you receive any security warnings about accepting certificates, select 'Always Allow' so that you are not asked for authorization in the future.

10. The ArchiOffice 2011 Client will open automatically with the Data Converter Wizard. Export the data from your ArchiOffice v8 application to the new version by clicking Continue.

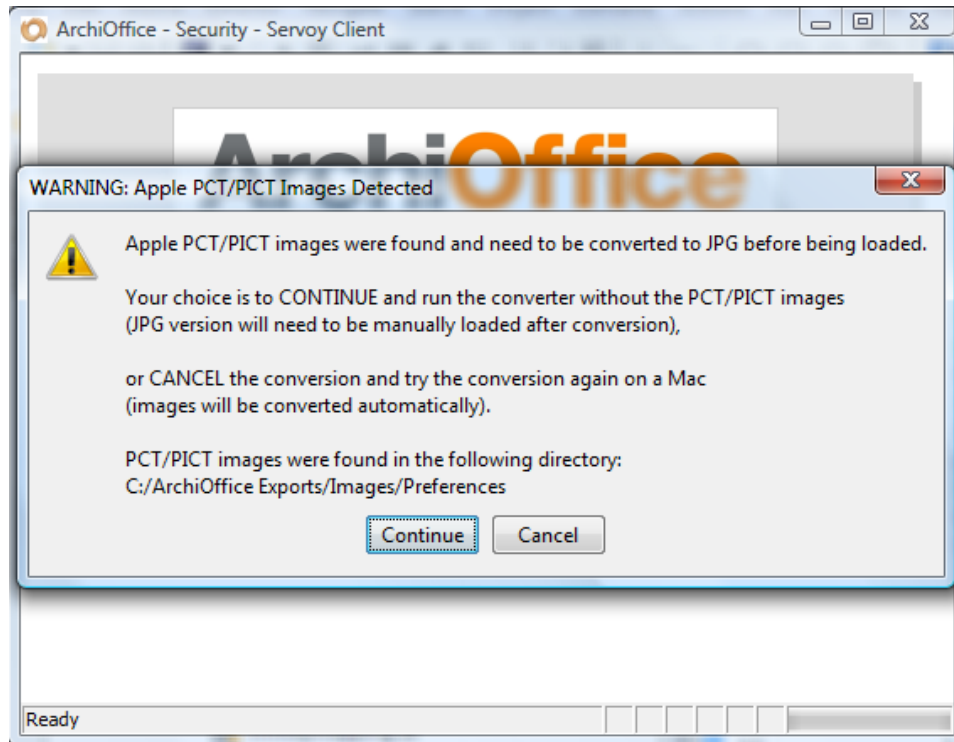


11. Point to the export folder where your ArchiOffice v8 data is stored. Click Continue.

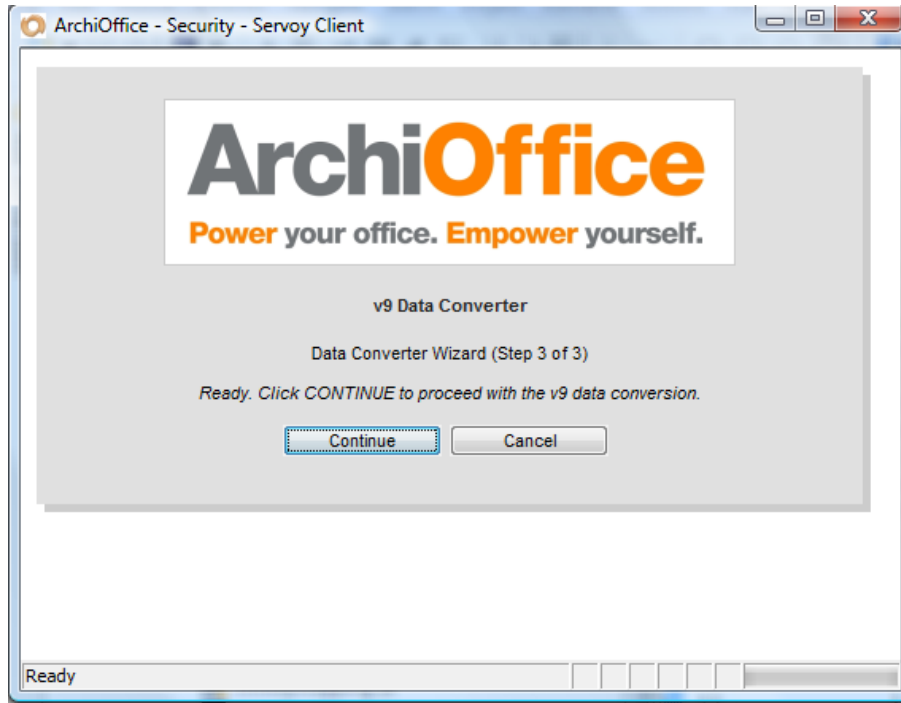


12. The Wizard checks your images in the Exports folder to see if any Apple PICT images have been exported. As PICT images cannot be loaded directly into ArchiOffice 2011 (see [Special Notes](#) below), you can:

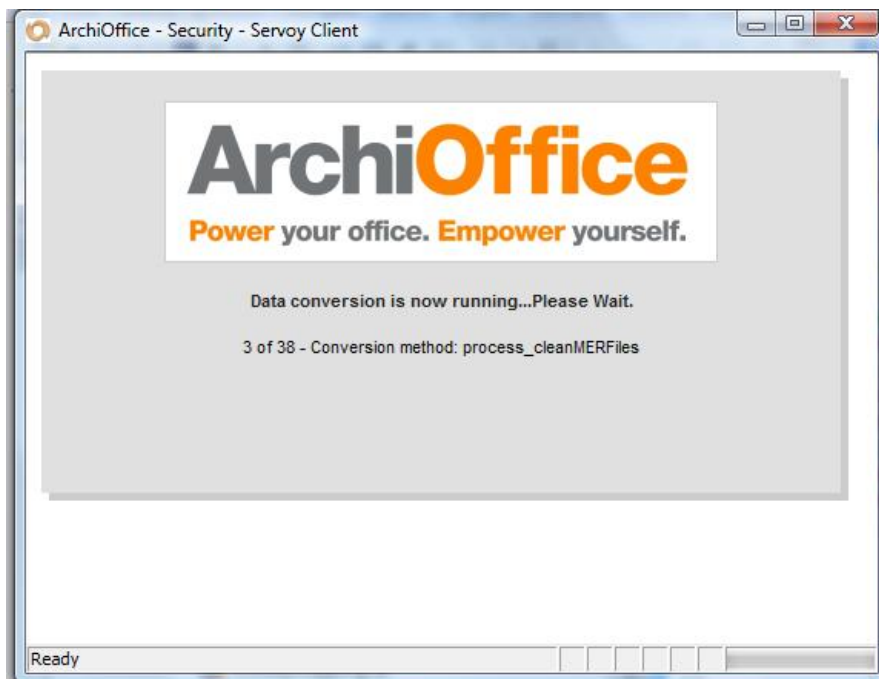
- Click Continue to proceed with running the converter on Windows without the PICT images and later manually load replacement jpg images, or
- Click Cancel to perform the conversion on Mac, where a PICT image converter will automatically launch and convert all PICT images into JPG equivalents using Apple libraries



13. Begin the process of loading the exported ArchiOffice v8 data into ArchiOffice 2011 by clicking Continue.



14. The upgrade process begins and may take some time. The Wizard shows the progress and when the data conversion is complete, the ArchiOffice 2011 Client will notify you.



15. The ArchiOffice Server (Servoy) database sequences are updated via a web post to <http://127.0.0.1:8081/servoy-admin>. In case of any error, update it manually by opening the Server's Admin Portal. Click Database Servers and then click on the 'Update Servoy sequences for all tables on all active servers' option.

16. Restart your computer and launch ArchiOffice 2011. Log in with the same User Name and Password as in ArchiOffice v8.

## Special Notes

### Expense Markup

If you apply expense markups by percentage (%), the conversion process may change this markup method to currency (\$). After the conversion process, when you use Billing Options in the Projects module (Projects > Billing > Options) to generate an invoice, you may need to select % from the Expense Markup drop-down list.

### ArchiOffice and Mac Images

When migrating from ArchiOffice v8 to 2011, the data converter may detect that Mac PCT/PICT images exist in one of your Export folders. The PCT/PICT image format is a Mac proprietary format, and hence needs to be converted to JPG format before it can be loaded into the ArchiOffice 2011 database.

The PCT/PICT images are typically found in your ArchiOffice v8 Exports> Images/Contacts, Images/Document Types and Images/Employees folders. These images were pasted into ArchiOffice v8 using the Mac clipboard and can include contact photos, document type icons, or employee photos. They are not part of the Document thumbnails or PDF images. You can first view these PCT/PICT images in the respective folders and then decide whether to proceed with the upgrade and reload the missing images later in ArchiOffice 2011.

All other images are loaded during the upgrade process; only the PCT/PICT images will be ignored, if you choose to do so. You have to then simply load an image for a document type in ArchiOffice 2011 by right clicking and pasting it.

### User Licensing

As of the ArchiOffice 2010 release the method of applying user licenses has changed. ArchiOffice V8 used a “floating” license method. Any user created in the system could access it on a first-come first-serve basis until the maximum number of allowed users, based on licenses purchased, was reached. As of ArchiOffice 2010, a user must be allocated a license. Users who are not allocated a license cannot log in to the system. These users can still have accounts in the system, have time slips and be added to projects.

To allocated a license to a user

1. Go to ArchiOffices’ Preferences area. In the Preferences folder tree, click on Users and then Details.
2. Select the checkbox in the Use License Seat column for the user to which you would like to allocate a license.

## ArchiOffice and OutlookOps

In case of existing users upgrading to ArchiOffice 2011, their OutlookOps (v1.5 or 1.7) cannot synchronize with ArchiOffice 2011. You need to uninstall your existing Outlook Ops application and reinstall a new version. However, you should **not** remove the 'Archioffice\_Sync' folder as this is used by the new Outlook Ops v2.0 as well. The new OutlookOps v2.0 application can be found in two locations:

- ArchiOffice 2011 server at C:\Program Files\ArchiOffice 2011\Servoy\Application\_server\Reports folder **or**
- Automatically injected into C:\ArchiOffice\_Sync\Outlook\Application folder upon the first attempt to use the sync feature (assuming the prior version has been removed). You will be prompted to install it with specific installation instructions.

The new OutlookOps v2.0 application is not installed automatically because there are specific privileges required to install it correctly. If the OutlookOps application is automatically injected into the user's ArchiOffice\_Sync folder, a dialog will prompt the user to install it with specific installation instructions.

The steps are as follows:

1. Note your main Outlook folder path (say Personal Folders or Mailbox).
2. Close Microsoft Outlook application.
3. Make sure that UAC (user account control) is turned off.
4. Right-click on the OutlookOps installer and select 'Run as Administrator' option to install the application.
5. Open ArchiOffice 2011 and go to Preferences-Users-Sync screen.
6. Make sure that the Outlook Folder setting matches what you noted earlier (*the default is Personal Folders for most of the users that are not using an Exchange server*).
7. Now start MS Outlook application. In a new installation, you will see a folder called ArchiOffice under the 'Personal Folders' folder. You have successfully installed OutlookOps!



Existing users may not notice any difference since the new ArchiOffice 2011 version uses the same folder structure.

## ArchiOffice Document Templates

To be compatible with a wider range of document types, ArchiOffice 2011 document templates are in Rich Text Format (.rtf). This format lets you create documents using all versions of Microsoft Word (both Mac and PC), Open Office, Notepad, TextEdit, Word Perfect and Adobe Illustrator.

To provide this capability, all **existing** ArchiOffice Documents Templates **must** be converted to RTF files.





Mac Word VBA does not have the necessary libraries for converting the .doc document templates to .rtf. Hence, Mac users need to run this conversion on a PC. The ArchiOffice Documents-Templates folder must be moved to a PC **before** performing the following steps. If you *do not* have access to a PC, please email your zipped Templates folder [support@ArchiOffice.com](mailto:support@ArchiOffice.com) and we will perform the document conversion for you.

To convert your documents to .RTF documents:

1. Go to C:\Program Files\ArchiOffice 2011\ArchiOffice Documents\Templates
2. Find the following files
  - RTF\_Converter.mer
  - RTF\_Converter\_Macro.doc
3. Copy these two files and paste them into your *existing* ArchiOffice Documents\Templates folder.
4. Double click on the 'RTF\_Converter\_Macro.doc' file. This will open Microsoft Word and each document template will be converted to .rtf file type.
5. You will see document conversions flashing in MS Word on your screen until the conversion is done. If you are prompted that certain fields cannot be found, click Cancel until the process is completed.

Upon completion of this process, you will be able to create new documents in ArchiOffice 2011.



If you are experiencing problems while upgrading from ArchiOffice v8 to ArchiOffice 2011, please check the [Knowledgebase Articles](#) for troubleshooting and technical issues. Else, contact us at (800) 371-0130 (ext#0) or [support@ArchiOffice.com](mailto:support@ArchiOffice.com).