

Aras Workspace Productivity Connector Preferences

Aras Workspace Productivity Connector preference settings are managed within Aras Innovator in the **Administration** section of the **TOC**.

To access these settings, use the following procedure:

1. Log into Aras Innovator as an administrator.
2. From the **TOC**, expand **Administration**, and select **Preferences**.
3. Click the **Search** Icon to execute a search and display a list of **Identities**.
4. In the search grid, double-click on the row containing the **World** identity. This opens the **Preferences** dialog for Aras Innovator.



Preferences ▼



	Identity Id [...]	modified_on [...]
		
	World	3/23/2020 2:...
	Innovator Ad...	3/30/2020 10...

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2 Results



5. Click on the **Office Preferences** Tab and double-click on **Office Connector Settings** within the tabular area at the bottom. This opens the **Office Connector Settings** webpage dialog.




World




Edit







^
Preference

Identity Id
[World](#)

^
General Settings
PE_MainPreferences
Office Preferences
Secure Social
Self-Service Report Settings


MSO_Poly








Hidden






ItemType

Office Connector Settings

General Settings

The general settings are in the dialog's top area and control some of the Aras Office Productivity Connector's general behaviors.

Office Connector Settings

Edit

Refresh

Help

Settings

Save

Cancel

More

Office Connector Settings

Viewable Generation

☐ Automatically for Save only
 ☒ Automatically for Save and Close only
 ☐ Manually select for both Save and Save and Close
 ☐ Automatically for Save and Close. Manually for Save

☐ Remove Local File On Close
 ☐ Do Not Increment Link Item Version On Update

Document Types

Property Redirection

Server Events

Office Document Types

Hidden

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O...	Label	Item Type [...]	Classification	Base Docume...	Native File [...]	Viewable File [...]	Template Requ...	Linked Item Re...	Allow Promote	Available To [...]	Generate Thu...	Valid Linked Items
1...	Document / Ad-hoc	Document	Ad-hoc		Document File - Native	Document File - Viewab...	☐	☐	☒	World	☒	Part
2...	Document / General	Document	General		Document File - Native	Document File - Viewab...	☒	☐	☐	World	☒	Part
5...	Document / Product	Document	Product		Document File - Native	Document File - Viewab...	☒	☐	☐	World	☒	Part
6...	Document / Project	Document	Project		Document File - Native	Document File - Viewab...	☒	☐	☐	World	☒	

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- **Viewable Generation:** Automating the creation of viewable files, like PDF and PDF/A, from Google Drive is one of the Aras Office Workspace Connector functionalities. There are four options that determine when viewable files are generated.
 - **Automatically for Save only**
 - **Automatically for Save and Close only**
 - **Manually select for both Save and Save and Close**
 - **Automatically for Save and Close. Manually for Save**

If the first or second option is selected, the system always handles the generation automatically.

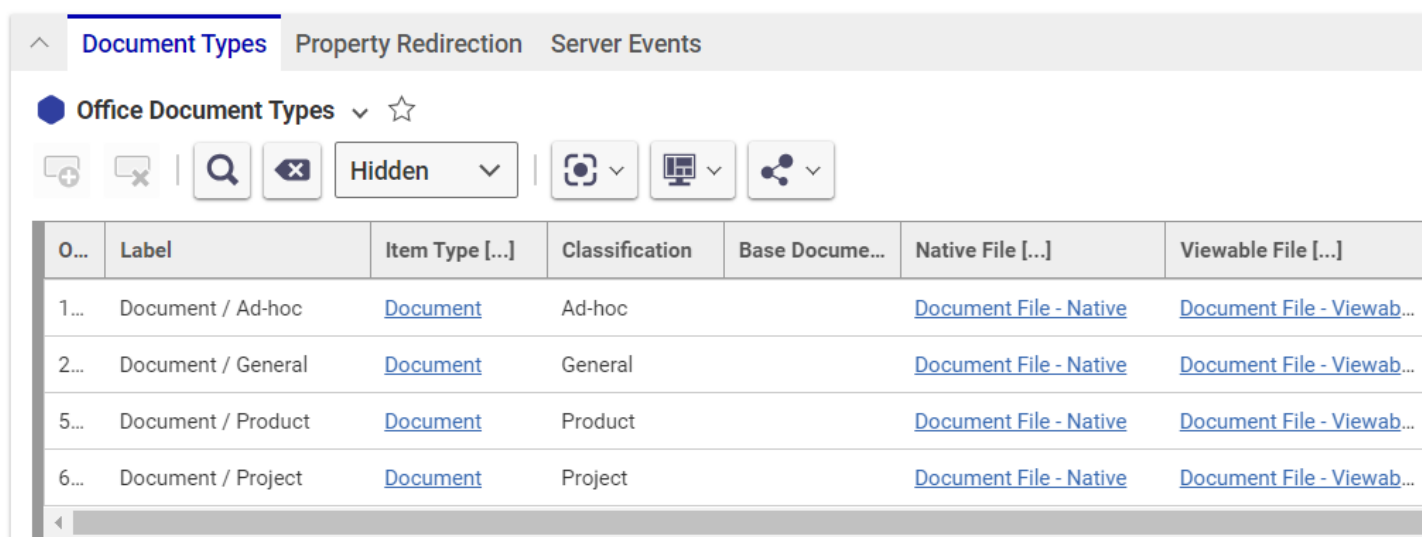
If the third or fourth option is selected, a checkbox is added to the Aras ribbon that enables the choice to generate the viewable file.

- **Remove Local File On Close:** This setting does not apply to Aras Workspace Productivity Connector.
- **Do Not Increment Link Item Version On Update:** This setting is currently unavailable for Aras Workspace Productivity Connector.

Document Types



The first tab in the Office Connector Settings dialog is **Document Types**. A **Document Type** refers to the combination of an **ItemType** and **Classification** used to manage an Office file. Any Aras **ItemType** (not just **Document**) can be used to manage Office documents if it is properly configured here in these settings. It is important to understand that the standard settings provided in this Tab are examples only. It is expected that they will be configured to match requirements for an organization. The standard settings refer to four **Classification** Values of the **Document ItemType** as shown below. The standard release automatically includes these **Classification** Values (**Ad-hoc**, **General**, **Product**, and **Project**) in the **Document ItemType**.



O...	Label	Item Type [...]	Classification	Base Docume...	Native File [...]	Viewable File [...]
1...	Document / Ad-hoc	Document	Ad-hoc		Document File - Native	Document File - Viewab...
2...	Document / General	Document	General		Document File - Native	Document File - Viewab...
5...	Document / Product	Document	Product		Document File - Native	Document File - Viewab...
6...	Document / Project	Document	Project		Document File - Native	Document File - Viewab...

In the table view, the **Order** property can be set to control the **sort order** for the **Document Types** — the order in which users see the **Document Types** listed when they create new documents from the Aras Office Connector. For the rest of the **Document Type** settings, it is more practical to edit them within a form rather than the tabular layout:

- To edit an existing **Document Type** in the relationship grid, right-click to display the context menu. Select **Document Types** and **Open**.
- To create and edit a new **Document Type**, click the **Add Row** button, select the new row, and select **Document Types** and **Open**.

You will then see the Office Document Type form.

Document / Ad-hoc

Edit

^ Office Document Type

Label Document / Ad-hoc	Available To World	Allowed Office Applications ☒ Word ☒ Excel ☒ PowerPoint ☐ Outlook ☒ Visio
Item Type Document	Document Numbering Method	
Classification Ad-hoc	Document Numbering Sequence	
Native File Document File - Native	Document Numbering Method MSO_Adhoc_Document_Numbering	
Viewable File Document File - Viewable	Rename File? No	
Base Document Type	File Naming Method	
Template Filter Method MSO_DefaultTemplateFilter		
Generate Thumbnail ☒	Template Required? ☐	Allow Promote ☐
	Linked Item Required? ☐	Allow Select Existing Document ☐

- **Label:** This is the name of the **Document** Type that users see. It can be any name.. By default, the value of **Label** will be automatically set as the combination of **ItemType** and **Classification** (as shown above), but it can be changed by typing something else in the **Label** field.
- **Item Type:** The name of the base **ItemType** used to manage Office documents. This can be any **ItemType** in the system.
- **Classification(Optional):** A specific **Classification** Type to use **Classification** to differentiate **Document** Types. If left blank, the base **ItemType** is used without a specific class value.
- **Native File:** Indicates where the native Office file (like .docx) is located in relation to the main itemThis can be either a relationship to File, a null relationship with an item property with a source File, or a property of type Item with source File. The value used to specify this is an Office Document Reference. Read the *Office Document References* section for details.
- **Viewable File:** This specifies the reference to the location of the viewable Office file (`.pdf` , etc.) relative to the base **ItemType**.



- **Base Document Type(Optional):** Shows the name of another Office Document Type used as the basis for **Property Mapping** and **Valid Linked Items** settings. Refer to the *Base Document Type* section for details.
- **Template Filter Method:** This allows setting the desired logic to determine which templates are available for selection by the user when they create a document. The Template Filter **Methods** provided by default are intended to give administrators examples of how to set this up. For example, the **MSO_ReleasedTemplateFilter Method** only allows users to select Released templates..
- **Generate Thumbnail:** This controls whether the thumbnail will generate on the **Document** Item form in Aras Innovator each time the item is saved.
- **Template Required?:** This controls whether the user must select a template stored in Aras when creating a new document using the **New Aras Document** command. Certain **Document** Types require templates, thus standardizing the document creation process in the organization.
- **Linked Item Required?:** This controls whether the user must select a Linked Item when creating a new document of this type. Certain **Document** Types, such as a **Part** or **Project**, should require using a Linked Item because the document should not exist without a relationship to this Item.
- **Allow Promote:** This controls whether the **Promote** function is available for the **Document** Type. This should only be enabled if the **ItemType** corresponding to the **Document** Type allows manual promotion and is not under the control of a change Item like **ECO** or **DCO**. If enabled, the **Promote** function will be made available both in the Aras ribbon (for manual use) and as part of the **Save and Close** function, for promoting after work is complete.
- **Allow Select Existing Document:** This allows users to select an existing **Document** Item, create a new file, and link the two instead of creating a new document of a particular type. Users can then use the **Document Number** associated with the existing **Document** Item instead of generating a new **Document Number**.

Important

If the **Allow Select Existing Document** checkbox is not selected, users cannot use an existing document.

- **Available To:** This specifies a single **Identity** that has access to the **Document** Type. Any user who belongs to this **Identity** can create documents of this Type. Otherwise, the user will not see the corresponding **Document** Type when creating a new document.



- **Document Numbering:** Document Numbering controls how Aras Documents are numbered for Office files. You can choose from three options:
 - **Method:** Use a custom Aras Method to define the numbering logic. You must enter the Method name in the next field.
 - **Sequence:** Use a predefined Aras Sequence. You must enter the Sequence name in the next field.
 - **Manual:** Let users enter the Document Number manually when creating the document.
- **Document Numbering Sequence:** If **Document Numbering** is set to **Sequence**, this field must include the name of the Aras **Sequence** to be used to define **Document Numbers**.
- **Document Numbering Method:** If **Document Numbering** is set to **Method**, this field must include the name of the Aras **Method** to be used to define **Document Numbers**. This approach provides more flexibility than **Sequence** since any desired logic can be used. The **Document Numbering Methods** provided by default are intended to give administrators examples of how to set this up. For example, the **Method MSO_Product_Document_Numbering** includes the following logic:
 - Determine if the **Document** is being linked to a **Part** (a **Valid Linked Item**).
 - If YES, the **Document Number** will be of the format **P12345-DOC-1**, where **P12345** is the **Number** of the Linked **Part**, **-DOC-** is a fixed text string, and **1** is a sequential integer starting from 1. If a second **Document** is later linked to the same **Part**, its **Document Number** will be **P12345-DOC-2**.
 - If NO, the **Document Number** will be set using the Default **Document** sequence.

The **Method** approach provides additional logic that allows the **Document Number** to be based on the **Part Number** if a Linked **Part** exists.

- **Rename File?:** This setting controls whether the Office file being saved into Aras (or being newly created) will be renamed or left as-is. Valid options are:
 - **No:** If saving an existing file, the file will not be renamed, and if creating a new file, the user will be prompted to enter a file name.
 - **Method:** An Aras **Method** will define the logic for renaming (or naming) the file. If this setting is used, the name of the Aras **Method** must be defined in the **File Naming Method** field.
 - **Match Document:** The filename will match the **Number** assigned to the **Document** based on the **Document** Numbering approach described above.
- **File Naming Method:** If **Rename File?** is set to **Method**, this field must include the name of the Aras **Method** to be used to define the file name. This approach provides more flexibility, like



Method for **Document** Numbering. The **File Naming Methods** provided by default are intended to give administrators examples of how to set this up. For example, the **Method MSO_Product_File_Naming** retrieves the value of the **Document Number** and appends the dash character and the entered **Document** Title (if any) to it. For example:

- If the **Document Number** is **P12345-DOC-1**, the File Name will be **P12345-DOC-1-MyTitle**.
- If the **Document Number** is **D54321**, the File Name will be **D54321-MyTitle**.

The **Method** approach provides additional logic that allows the file name to be more descriptive.

- **Allowed Office Applications:** This field specifies which Office application the **Document** Type applies to.

Important

Aras Workspace Productivity Connector currently supports Google Docs, Sheets, and Slides.

Default Document Type

A **Default Document Type** has its **ItemType** Value set, but the **Classification** Value is not set. This is used to manage files that were previously stored manually in Aras. For example, an administrator uses the standard Aras **Document ItemType** and has ten different **Classification** values already used in existing **Documents** (not created by the Aras Workspace Productivity Connector). Suppose that in the future, the administrator wants to use only specific **Document Types** in Aras Workspace Productivity Connector for three of those **Classifications**. This means that if a user opens a **Document** set to any of the other seven **Classification** Values, it will be opened as a **Default Document Type**. Thus, it will follow the defined behaviors of the **Default Document Type** regarding **Property Mappings**, **Valid Linked Items**, etc. This saves time, as **Document Types** won't have to be defined for every existing **Classification**. Any **Document** with a **Classification** Value that does not match a specific **Document Type** will be treated as **Default**.

Base Document Type

Using a Base Document Type simplifies the definition of Property Mappings and Valid Linked Items, where most or all definitions are shared with many Document Types. To set a Base Document Type,



simply pick an existing Document Type from the Base Document Type Property. In the example below, the Document Type Document / Miscellaneous uses a Base Document Type of Document Base. The Document / Miscellaneous Document Type automatically uses all Property Mapping definitions and Valid Linked Items for Document Base.

Document / Miscellaneous

Office Document Type

Label: Document / Miscellaneous

Item Type: Document

Classification: Miscellaneous

Native File: Document File - Native

Viewable File: Document File - Viewable

Base Document Type: **Document Base**

Generate Thumbnail: ☐

Template Required?: ☐

Allow Promote: ☐

Linked Item Required?: ☐

Allow Select Existing Document: ☐

Document Base

Office Document Type

Label: Document Base

Item Type: Document

Classification:

Native File: Document File - Native

Viewable File: Document File - Viewable

Base Document Type:

Generate Thumbnail: ☐

Template Required?: ☐

Allow Promote: ☐

Linked Item Required?: ☐

Allow Select Existing Document: ☐

Property Mapping

Valid Linked Items

MSO_DocumentType PropertyMap

Order	Office Property	Aras Property	Use Template
128	Aras Created On	created_on	☐
256	Title	name	☐
384	Aras Author	created_by_id	☐
512	Subject	description	☐
640	Aras Document	item_number	☐
768	Revision	major_rev	☐

The following logic applies when using a Base **Document Type**:

- All settings in the **Document Type** header must be set directly and are not inherited from the **Base Document Type**.
- Any Property Mappings set on the current **Document Type** are in addition to those set on the **Base Document Type**. When there are duplicates, the settings on the current **Document Type**



override those on the **Base Document Type**.

- Any **Valid Linked Items** set on the current **Document Type** are in addition to those set on the **Base Document Type**. When there are duplicates, the settings on the current **Document Type** override those on the **Base Document Type**.
- The **Base Document Type** must be the same **ItemType** as the referencing **Document Type**.
- Only one reference level is allowed (i.e., no recursive definition).

The concepts of **Base Document Type** and **Default Document Type** can be combined. This is achieved simply by defining a **Base Document Type** with no Classification Value.

Attaching a Google Doc/Sheet/Slide to an Existing Aras Innovator Document

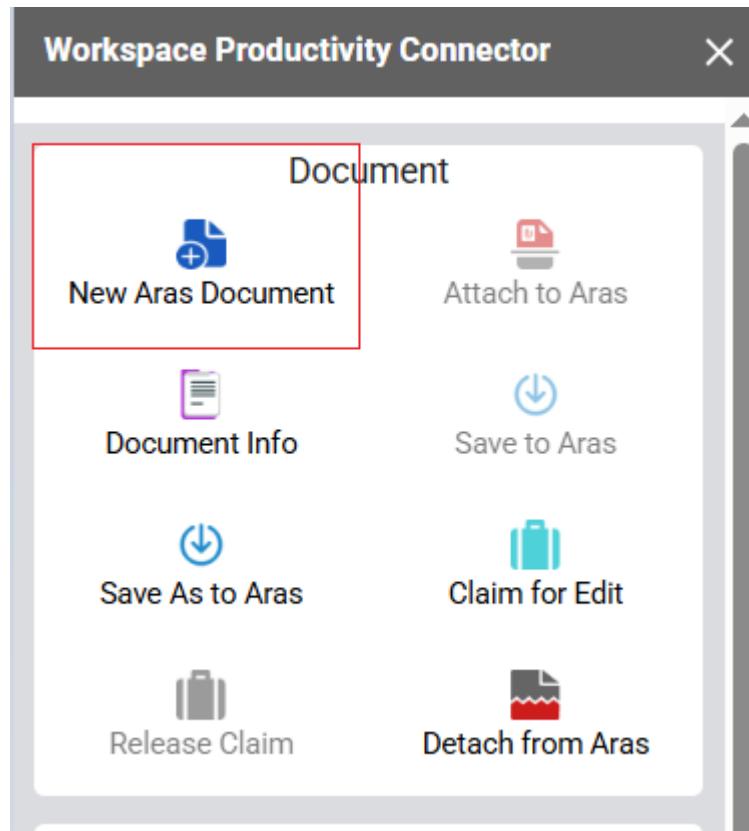
Important

The **Allow Select Existing Document** checkbox must be checked on the appropriate Office Document Type before you can use this feature.

Use the following procedure to attach a file to an existing Aras Innovator document:



1. Select **New** and **New ArasDocument** in the ribbon. The New Document task pane appears:



Workspace Productivity Connector

×

New Aras Document

Document Type *

Document Template

... ✕

Link to

Linked Item

... ✕

Title *

File Name *

Document Number

auto-generated

Properties

OK

Cancel

2. Select the **Document Type** from the dropdown list in the **Document Type** field.



Workspace Productivity Connector

✕

New Aras Document

Document Type *

Document / Ad-hoc

3. Click the **ellipsis (...)** next to the **Document Number** field. The Search dialog box appears.

Search Document

Search

Clear

*Note: Can not select Document items with state Released

Claim	Document Number	Revision	Name	Type	State	Authoring Tool	Change
▼				Ad-hoc		Microsoft Word ▼	☐

No Items Found

Select

Cancel

4. Click the **Search** Icon to see a list of existing document items that do not have any related files.



Document Types
Property Redirection
Server Events

Property Redirections

Hidden

Item Type [...]	Original Property [...]	Redirect Property [...]
CAD	authoring_tool	authoring_tool_office
Document	authoring_tool	authoring_tool_office

- Item Type:** This is the Name of the **ItemType** within Aras Innovator that requires property redirection.
- Original Property:** This is the Name of the property within the Aras **ItemType** definition that is to be redirected. It must be set to **authoring_tool**. No other Aras properties are currently supported.
- Redirect Property:** This is the name of the property within the Aras **ItemType** definition to which the original property will be redirected.

Valid Linked Items

The **Aras Workspace Productivity Connector** makes it easy to link Documents to other Aras Items like **Parts** and **Projects**.The term “link” refers to the Aras concept of a relationship between two items. When links are used, the Base Item that contains the files is always the Related (i.e., Subordinate) Item and it is related to a Parent Item such as a **Part**.

You can define **Valid Linked Items** on the second Tab of either the Office Document Type or Office Email Document Type Form. This setting defines which Aras **ItemTypes** can be used as Parent Items of the Relationship for the given **Document Type**. For example, in the standard settings, only **Parts** can be linked items for the **Document / Product Document Type** because this type is designed to manage documents related to **Part** definition (specs, test plans, etc.).





Valid Linked Items are defined separately for each **Document Type**, and you can have as many valid Items as you want. Entries for **Valid Linked Items** are based on Office Document References, as described in the following section.

Office Document References

Office Document Reference is an **ItemType** used by the Aras Workspace Productivity Connector to define **Document Types** in a flexible way. It defines the links between the Base **ItemType** used by the **Document Type** and:

- The files are managed by the Connector (viewable).
- Any **valid linked items** (such as **Part**, **Project**, etc.).

In each of these cases, the links can either be:

- Item relationships (e.g., **Document** File, **Part** Document).

You can access Office Document References from the **Administration** section of the **TOC**.



Office Documen... X

Office Document References

Search

Clear

Simple

Label	Item Type [...]	Property [...]	Description [...]
Document File - Viewable	Document File	related_id	Viewable files stored on Documents
Document File - Native	Document File	related_id	Native Office files stored on Documents
Part	Part Document	related_id	Part - Document Relationship
Document File - Thumbnail	Document File	related_id	Thumbnail files stored on Documents

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Methods

Office Document References

The standard references shown here are provided to support the standard **Document Types**, but customers are expected to create their own to match the **ItemTypes** they are using to manage Office documents. **Office Document References** contain four properties as shown on the form here:



Document File - Viewable

Office Document Reference

Label
Document File - Viewable

Item Type
[Document File](#)

Property
[related_id](#)

Description
Viewable files stored on Documents

- **Label:** The name of the reference.

Important

When the reference is used for **Valid Linked Items**, this **Label** will be visible to users in the **Link to** selector in the New Aras Document task pane. The **Label** should typically be set equal to the **Singular Label** of the Parent **ItemType**.

- **Item Type:** For a relationship, this is the name of the Relationship **ItemType**. This is the **ItemType** containing the property for a property of type **Item**.
- **Property:** This will always be the **related_id** property for a relationship. This is the name of the property for a property of type **Item**.
- **Description:** A description for the reference.

Property Mapping

Property Mapping is defined on the first tab of either the Office Document Type or Office Email Document Type Form. This Tab controls the property mappings between the Office file and the Aras **Document**. Properties can be mapped in either direction and can be set to be mapped either during



the initial document creation (**Create**) or upon subsequent saves (**Update**). In addition to those two mapping events, any properties mapped **From Aras to Office File** are updated when the user clicks the **Refresh** button in the Aras ribbon.

Property Mappings must be defined for each **Document** Type separately, although using **Base Document Types** can simplify the process. The Aras Office Connector provides a set of standard **Property Mappings** as shown here. **xProperties** can be used in **Property Mappings**. Any **Extended Classifications (xClasses)** assigned to template documents will be automatically assigned to documents created from the templates, and **Property Mappings** can be configured for **xProperties** within the assigned **xClasses**.

If Property **Mapping** includes an **xProperty** configuration but the **Document** Item does not include these **xClasses**, the **Property Mapping** will be ignored. If a user creates a new **Document** in Office Connector and selects an existing **Document** and **Document Template**, any **xClasses** contained in the **Documents** are merged. Standard Mappings for **Document Types**:

Order	Office Property	Aras Property	Use Template	Direction	Create	Update
128	Aras Created On	created_on	☐	From Aras to Office File	☒	☐
256	Title	name	☐	From Office File to Aras	☒	☐
384	Aras Author	created_by_id	☐	From Aras to Office File	☒	☐
512	Title	name	☐	From Aras to Office File	☐	☒
640	Subject	description	☐	From Office File to Aras	☒	☒
768	Aras Document	item_number	☐	From Aras to Office File	☒	☒
896	Revision	major_rev	☐	From Aras to Office File	☒	☒

Standard Mappings for Email Document Types:

- Valid Aras property Types for mapping include String, Text, Integer, Decimal, Float, List, Filter List, Multi Value List, Boolean, Date, and Item. Foreign and Federated property data types are also supported, but only in the direction from Aras to Office.
- If properties are defined as Required on the Aras **ItemType**, the property entry field will be presented to the user with a blue background inside Aras Office Productivity Connector. The user cannot create or save a new document until all required properties are entered.
- If properties are defined as having a default value on the Aras ItemType, this default value will be present to the user inside Aras Office Productivity Connector. They may then change the value if desired.

Important

Classification and **authoring_tool Property Mappings** are only supported from Aras to Office. They cannot be mapped from Office File to Aras.

Mapping Properties from Linked Items

Documents are often linked to other Aras Items, like **Parts**. It is useful to be able to map properties from these linked Items. This capability is available but uses a specific technical approach known as **Foreign** properties in Aras, essentially properties inherited from one Item to another. This approach makes it possible to map and display properties from linked Items but not to set properties on those Items. The following example describes the step-by-step process to set this up.

Company ACME has certain product specifications in Word that require displaying the official **Part** and **Project Numbers** from their Aras PLM system and the **Document** number itself. The header of the Word document looks like this:

ACME PRODUCT SPECIFICATION

Document Number DOC-22412

Part Number P14332-001

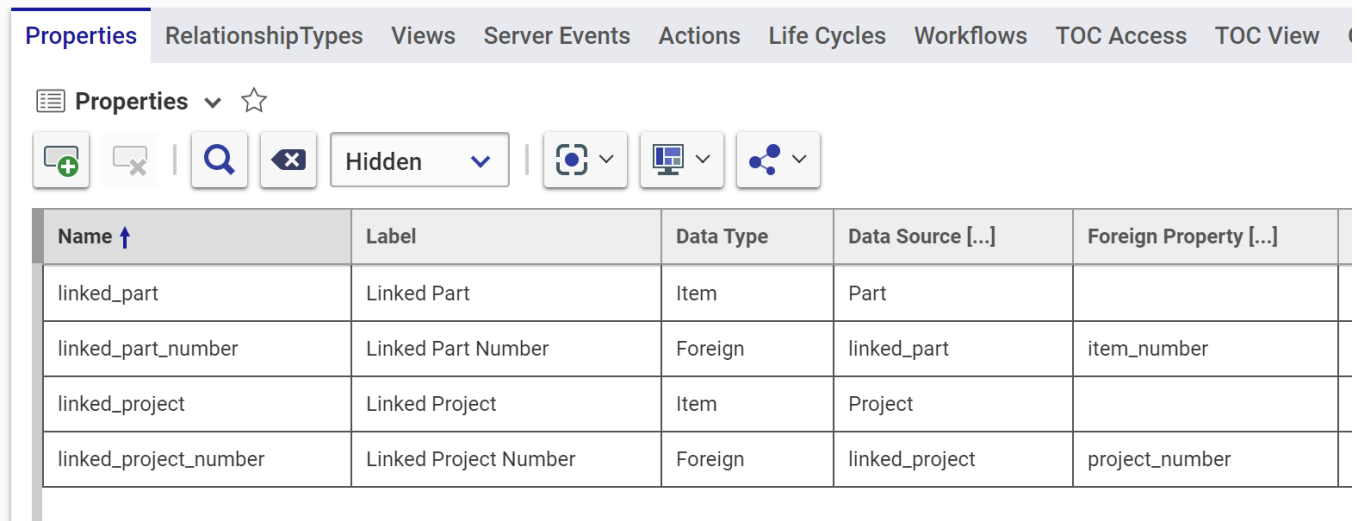
Project Number PROJ-2213

While the value of the **Document Number** is a standard case, getting the values for the **Part Number** and **Project Number** mapped into the Word document requires establishing appropriate **Foreign** properties on the **Document** Item.



1. Set up Properties on the **ItemType**.

Properties necessary to support our example look like this:



Name ↑	Label	Data Type	Data Source [...]	Foreign Property [...]
linked_part	Linked Part	Item	Part	
linked_part_number	Linked Part Number	Foreign	linked_part	item_number
linked_project	Linked Project	Item	Project	
linked_project_number	Linked Project Number	Foreign	linked_project	project_number

The **linked_part** and **linked_project** properties are regular Item properties that point to the linked **Part** and **Project**, respectively. The **linked_part_number** and **linked_project_number** properties are **Foreign** properties that refer back to the Item properties.

Important

It is possible to access more than one property from the same linked Item by defining multiple **Foreign** properties with the same **Data Source** but different **Foreign Properties**.

2. Set up **Foreign Data Source** for Linked Items.

The Aras Workspace Productivity Connector needs to know the names of which Item properties to set for each linked item. When **Foreign** properties are used, you need to add the name of the Item property into the **Foreign Data Source** column of the **Valid Linked Items** settings, as shown here:

Property Mapping

Valid Linked Items

Office Document References

Label	Item Type [...]	Property [...]	Description [...]	Foreign Data ...
Part	Part Document	related_id	Part - Document Relationship	
Activity	Activity2 Deliverable	related_id	Activity2 - Deliverable Relationship	linked_part
Project	Project Docs	related_id	Project - Document Relationship	linked_project
WBS Element	WBS Deliverable	related_id	WBS - Deliverable Relationship	

Foreign Data Source is an optional setting. Note that **Activity** and **WBS Element** are **Valid Linked Items** for this **Document Type**, but they don't have any **Foreign Data Source** set. This means that no **Property Mappings** can be supported from any **Activity** or **WBS Elements** that may be linked to a **Document** of this type.

Important

When a **Foreign Data Source** is selected, the Aras Workspace Productivity Connector automatically sets the ID of the user's selected linked item into the **Foreign Data Source** property for the current **Document**. Then, based on the standard behavior of Aras **Foreign Properties**, property values from the linked Item are made available.

3. Set up **Property Mappings**.

To map the actual **Foreign** properties into Office, use **Property Mappings**. Only directions going from Aras to Office are supported.

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Property Mapping

Valid Linked Items

MSO_DocumentType PropertyMap

☆

Simple

▼

▼

▼

▼

Order	Office Property	Aras Property	Use Template	Direction	Create	Update
	link*					
900	Linked Part Number	linked_part_number	☐	From Aras to Office File	☒	☒
901	Linked Project Number	linked_project_number	☐	From Aras to Office File	☒	☒

