



# **Office Productivity Connector - Release 22**

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# Administrator Guide



## Overview

Microsoft Office applications are a big part of most manufacturing companies' product development process. For example, Microsoft Word is used to create product specifications, Microsoft Excel for product-related financial spreadsheets, and Microsoft PowerPoint for product briefings.

The Aras Office Productivity Connector provides a convenient way to manage Microsoft Office documents in Aras directly from the user interface of the Office applications. The connector helps standardize company documentation procedures by providing easy access to template documents, controlling file numbering and naming, and automating the creation of viewable files like PDF.

The Aras Office Productivity Connector administration is straightforward and contained completely within the Administration section of the Aras Innovator web client. The Connector is designed to be simple to use, and one aspect of this is that the administrator controls all options on a site-wide basis. This helps control corporate processes and simplify the user's operation.

This **Administration Guide** assumes a basic knowledge of Aras configuration, including **ItemTypes**, **Lists**, and **Methods**. For more information on these topics, please see the *Just Ask Innovator* documentation, which can be accessed from within Aras Innovator by clicking **the User icon in the upper-right corner, selecting Help, and selecting Just Ask Innovator**.

It is recommended that all Aras Office Productivity Connector administrators read the *Aras Office Productivity Connector 22 - User Guide*. This guide explains how the administrator settings affect the user interface and provides in-depth instructions on topics like template management and Office file property mapping, which are both user- and administrative-related.



## Aras Office Productivity Connector Preferences

Aras Office 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. Login to 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 [...]                                                                 |
|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
|  |  |  |
|                                                                                   | <a href="#">World</a>                                                             | 3/23/2020 2:...                                                                   |
|                                                                                   | <a href="#">Innovator Ad...</a>                                                   | 3/30/2020 10...                                                                   |

< Prev
Next >
Page: 1 of 1
|
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**   |  v  v  v | 

 **Preference**

**Identity Id**  
[World](#)

 **General Settings** **PE\_MainPreferences** **Office Preferences** **Secure Social** **Self-Service Report Settings**

 **MSO\_Poly** v 

   |   **Hidden** v |  v  v  v

 **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 ↻ ↺ ⚙️ 🗑️ 🔗 ⋮

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 🔍 ⚙️ 🗑️ 🔗 ⋮

| 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  | <a href="#">Document</a> | Ad-hoc         |                | <a href="#">Document File - Native</a> | <a href="#">Document File - Viewab...</a> | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> | World              | <input checked="" type="checkbox"/> | Part               |
| 2... | Document / General | <a href="#">Document</a> | General        |                | <a href="#">Document File - Native</a> | <a href="#">Document File - Viewab...</a> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            | World              | <input checked="" type="checkbox"/> | Part               |
| 5... | Document / Product | <a href="#">Document</a> | Product        |                | <a href="#">Document File - Native</a> | <a href="#">Document File - Viewab...</a> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            | World              | <input checked="" type="checkbox"/> | Part               |
| 6... | Document / Project | <a href="#">Document</a> | Project        |                | <a href="#">Document File - Native</a> | <a href="#">Document File - Viewab...</a> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            | World              | <input checked="" type="checkbox"/> |                    |

< Prev Next > Page: 1 of 1 | 4 Results | 🔍

- **Viewable Generation:** Automating the creation of viewable files, like PDF and PDF/A, from Office applications is one part of the Aras Office Productivity Connector functionality. Four options determine when viewable files are generated. 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 Office Productivity Connector.
- **Do Not Increment Link Item Version On Update:** This setting is currently unavailable for Aras Office Productivity Connector.

## Document Types

The first tab within 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 here. The standard release automatically includes these **Classification** Values (**Ad-hoc**, **General**, **Product**, and **Project**) in the **Document ItemType**.



| Document Types                                                                                                                                                                       |                    |                          |                |                |                                        |                                           |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|--------------------------|----------------|----------------|----------------------------------------|-------------------------------------------|
| Property Redirection Server Events                                                                                                                                                   |                    |                          |                |                |                                        |                                           |
| <div> <div>Office Document Types</div> <div> <div>+</div> <div>×</div> <div>Q</div> <div>×</div> <div>Hidden</div> <div> <div>⊞</div> <div>⊞</div> <div>⊞</div> </div> </div> </div> |                    |                          |                |                |                                        |                                           |
| O...                                                                                                                                                                                 | Label              | Item Type [...]          | Classification | Base Docume... | Native File [...]                      | Viewable File [...]                       |
| 1...                                                                                                                                                                                 | Document / Ad-hoc  | <a href="#">Document</a> | Ad-hoc         |                | <a href="#">Document File - Native</a> | <a href="#">Document File - Viewab...</a> |
| 2...                                                                                                                                                                                 | Document / General | <a href="#">Document</a> | General        |                | <a href="#">Document File - Native</a> | <a href="#">Document File - Viewab...</a> |
| 5...                                                                                                                                                                                 | Document / Product | <a href="#">Document</a> | Product        |                | <a href="#">Document File - Native</a> | <a href="#">Document File - Viewab...</a> |
| 6...                                                                                                                                                                                 | Document / Project | <a href="#">Document</a> | Project        |                | <a href="#">Document File - Native</a> | <a href="#">Document File - Viewab...</a> |

Within the tabular view, the **Order** property can be set to control the sort order for the **Document** Types. The sort order is 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 a 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

|                                                                            |                                                                                  |                                                                                                                                                                                                                                                                |
|----------------------------------------------------------------------------|----------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Label</b><br>Document / Ad-hoc                                          | <b>Available To</b><br><a href="#">World</a>                                     | <b>Allowed Office Applications</b><br><input checked="" type="checkbox"/> Word<br><input checked="" type="checkbox"/> Excel<br><input checked="" type="checkbox"/> PowerPoint<br><input type="checkbox"/> Outlook<br><input checked="" type="checkbox"/> Visio |
| <b>Item Type</b><br><a href="#">Document</a>                               | <b>Document Numbering</b><br>Method                                              |                                                                                                                                                                                                                                                                |
| <b>Classification</b><br>Ad-hoc                                            | <b>Document Numbering Sequence</b>                                               |                                                                                                                                                                                                                                                                |
| <b>Native File</b><br><a href="#">Document File - Native</a>               | <b>Document Numbering Method</b><br><a href="#">MSO_Adhoc_Document_Numbering</a> |                                                                                                                                                                                                                                                                |
| <b>Viewable File</b><br><a href="#">Document File - Viewable</a>           | <b>Rename File?</b><br>No                                                        |                                                                                                                                                                                                                                                                |
| <b>Base Document Type</b>                                                  | <b>File Naming Method</b>                                                        |                                                                                                                                                                                                                                                                |
| <b>Template Filter Method</b><br><a href="#">MSO_DefaultTemplateFilter</a> |                                                                                  |                                                                                                                                                                                                                                                                |
| <b>Generate Thumbnail</b><br><input checked="" type="checkbox"/>           | <b>Template Required?</b><br><input type="checkbox"/>                            | <b>Allow Promote</b><br><input type="checkbox"/>                                                                                                                                                                                                               |
|                                                                            | <b>Linked Item Required?</b><br><input type="checkbox"/>                         | <b>Allow Select Existing Document</b><br><input type="checkbox"/>                                                                                                                                                                                              |

- **Label:** This is the name of the **Document** Type that users see. It can be any text string that makes sense for a company. 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:** Specifies the reference to the location of the native Office file ( `.docx` , etc.) relative to the base **ItemType**. This 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 during the document creation process. The **Template Filter Methods** provided by default are intended to give administrators examples of how to set this up. For example, the **MSO\_ReleasedTemplateFilterMethod** only allows users to select Released templates during creation.
- **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 will be forced to select a template stored in Aras as the basis for the new document being created when using the **New Aras Document** command. Certain **Document** Types should require templates, thus standardizing the document creation process in the organization.
- **Linked ItemRequired?:** This controls whether the user will be forced to 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:** When this checkbox is selected, users can 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 this 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:** This allows setting one of three options for controlling the numbering of Aras Documents used to manage Office files: **Method**, **Sequence**, or **Manual**. **Method** means that you will define an Aras **Method** to define the logic for the **Document Number**. **Sequence** means you are going to use an Aras **Sequence** directly. **Manual** allows end users to enter the **Document Number** at the creation time. If **Sequence** is selected, the desired **Sequence** must be entered in the next field. If **Method** is selected, the desired **Method** must be entered in the following field.
- **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 Office Productivity Connector currently supports Word, Excel, and PowerPoint.

### 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 Office Productivity Connector). Suppose that in the future, the administrator wants to use only specific **Document Types** in Aras Office 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 of these 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 following example, 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    | <input type="checkbox"/> |
| 256   | Title           | name          | <input type="checkbox"/> |
| 384   | Aras Author     | created_by_id | <input type="checkbox"/> |
| 512   | Subject         | description   | <input type="checkbox"/> |
| 640   | Aras Document   | item_number   | <input type="checkbox"/> |
| 768   | Revision        | major_rev     | <input type="checkbox"/> |

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 an Office File 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:



Office Productivity Connector

×

New Document

Document Type \*

Document Template

Link to

Linked Item

Title \*

File Name \*

Document Number

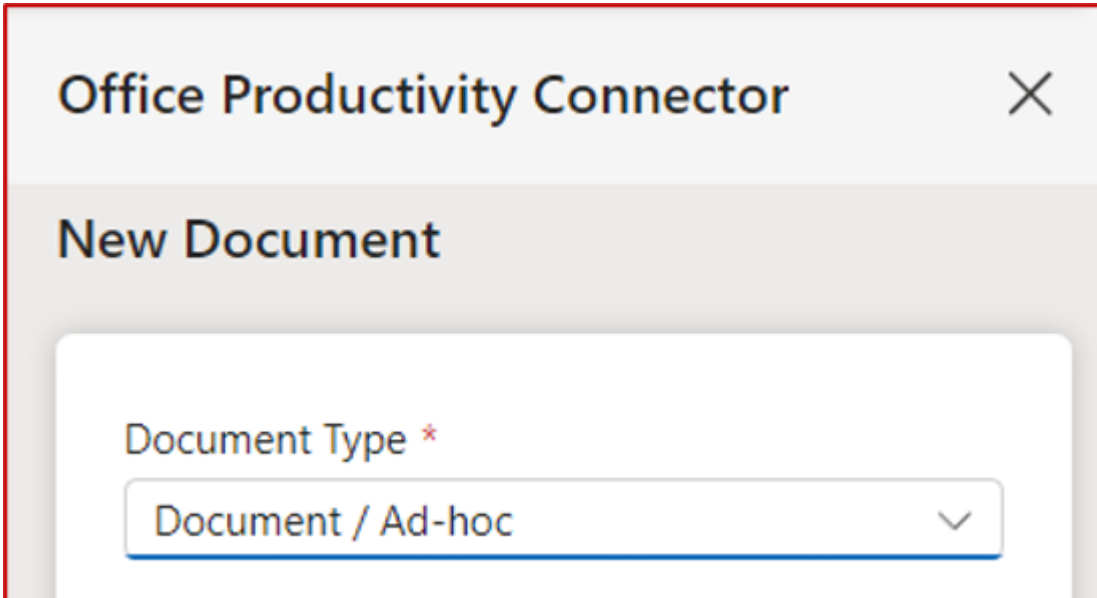
auto-generated

Properties

OK

Cancel

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



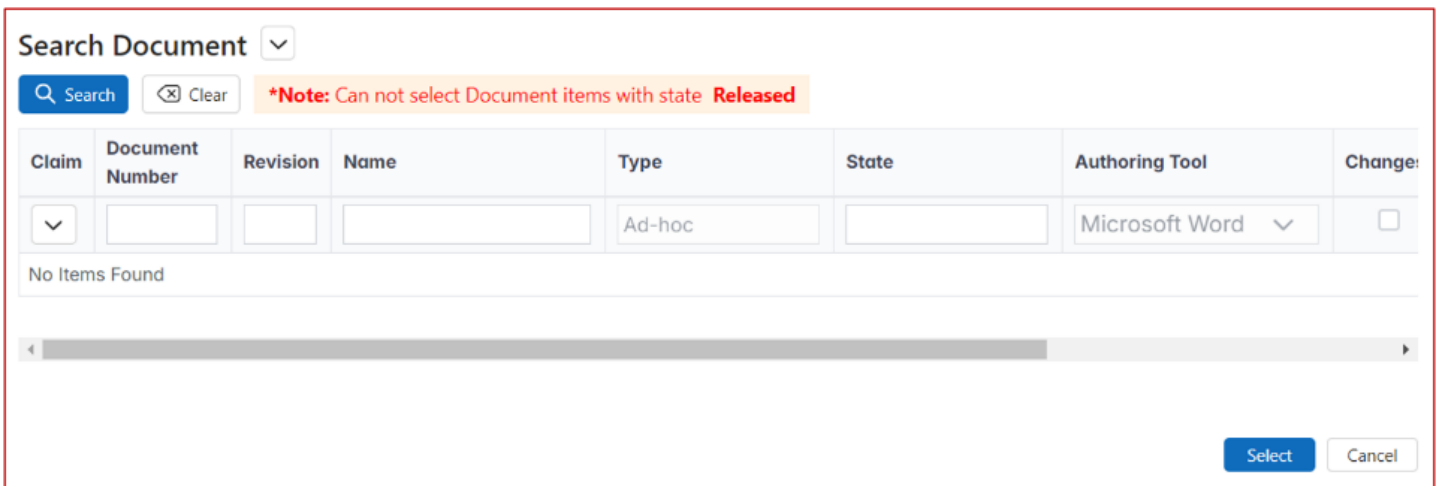
Office Productivity Connector

New 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 ▼ | <input type="checkbox"/> |

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.

Search Document

**\*Note: Can not select Document items with state Released**

| Claim                            | Document Number      | Revision             | Name                        | Type   | State                | Authoring Tool                                  | Change:                  |
|----------------------------------|----------------------|----------------------|-----------------------------|--------|----------------------|-------------------------------------------------|--------------------------|
| <input type="button" value="v"/> | <input type="text"/> | <input type="text"/> | <input type="text"/>        | Ad-hoc | <input type="text"/> | Microsoft Word <input type="button" value="v"/> | <input type="checkbox"/> |
|                                  | 100029               | A                    | Bicycle Wheel Specification | Ad-hoc | Preliminary          | Microsoft Word                                  | <input type="checkbox"/> |
|                                  | DOC-123              | A                    | Specification               | Ad-hoc | Preliminary          | Microsoft Word                                  | <input type="checkbox"/> |

5. Select the existing **Document** and click **Select**. The **Document Number** is applied to the new document.

Document Number

DOC-123

## Property Redirection

The second tab in the Office Connector Settings dialog is **Property Redirection**. This Tab allows you to define redirection for specific properties, such as **authoring\_tool**, required by the Office Connector. It can also be used in cases where a property required by the Office Connector is already being leveraged for another purpose and cannot be used simultaneously with the Office Connector.

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

One of the capabilities of the Aras Office Productivity Connector is that it allows easy linking of **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, related to a Parent Item such as a **Part**. **Valid Linked Items** are defined on the second Tab of either the Office Document Type or Office Email Document Type Form. This setting defines which other 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.).

| Label | Item Type [...]               | Property [...]             | Description [...]            | Foreign Data ... |
|-------|-------------------------------|----------------------------|------------------------------|------------------|
| Part  | <a href="#">Part Document</a> | <a href="#">related_id</a> | Part - Document Relationship |                  |

**Valid Linked Items** are defined separately for each **Document Type**, and you can have as many valid Items as desired. 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 Office 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 managed by the Connector (both native and 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**).
- Properties of type **Item** (e.g., the **native\_file** property on **CAD Document**).

**Office Document References** are accessed from within the **Administration** section of the **TOC**.

**aras INNOVATOR**

Office Documenten...

**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     |

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

Edit

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.

Here are some typical examples to illustrate the use of Office Document References, using standard Aras **ItemTypes** like **Document** and **CAD Document** to explain the common data model options:

| Use Case                                                            | Label                                | Item Type     | Property   |
|---------------------------------------------------------------------|--------------------------------------|---------------|------------|
| Managing the native file on the Files tab of a <b>Document</b> Item | Document File – Native (label is not | Document File | related_id |



|                                                                                                                                                                                           |                                                         |               |               |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------|---------------|---------------|
| Managing the native file using the <b>native_file</b> property on a <b>CAD Document</b> Item                                                                                              | critical)<br>CAD Native File<br>(label is not critical) | CAD           | native_file   |
| Managing the native file using the <b>CADFiles</b> null relationship to <b>CAD Document</b>                                                                                               | CAD File (label is not critical)                        | CADFiles      | attached_file |
| Linking a <b>Part</b> as a <b>Valid Linked Item</b> to a <b>Document</b>                                                                                                                  | Part                                                    | Part Document | related_id    |
| Linking a <b>Part</b> as a <b>Valid Linked Item</b> to a <b>CAD Document</b>                                                                                                              | Part                                                    | Part CAD      | related_id    |
| Linking a <b>CustomItem1</b> Item as a <b>Valid Linked Item</b> to a <b>Document</b> , where its Item property <b>document_link</b> is configured to show a single linked <b>Document</b> | CustomItem1                                             | CustomItem1   | document_link |

Once **Office Document References** are created, they are used in two places in the definition of **Office Document Types**: the links to the **Native** and **Viewable Files**, and the **Valid Linked Items**.



**Document / Ad-hoc** ☆

**Edit** [Refresh] [Undo] [Redo] [Share] [More]

**Office Document Type**

|                                                                            |                                                                                  |
|----------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| <b>Label</b><br>Document / Ad-hoc                                          | <b>Available To</b><br><a href="#">World</a>                                     |
| <b>Item Type</b><br><a href="#">Document</a>                               | <b>Document Numbering</b><br>Method                                              |
| <b>Classification</b><br>Ad-hoc                                            | <b>Document Numbering Sequence</b>                                               |
| <b>Native File</b><br><a href="#">Document File - Native</a>               | <b>Document Numbering Method</b><br><a href="#">MSO_Adhoc_Document_Numbering</a> |
| <b>Viewable File</b><br><a href="#">Document File - Viewable</a>           | <b>Rename File?</b><br>No                                                        |
| <b>Base Document Type</b>                                                  | <b>File Naming Method</b>                                                        |
| <b>Template Filter Method</b><br><a href="#">MSO_DefaultTemplateFilter</a> |                                                                                  |
| <b>Generate Thumbnail</b><br><input checked="" type="checkbox"/>           | <b>Template Required?</b><br><input type="checkbox"/>                            |
|                                                                            | <b>Linked Item Required?</b><br><input type="checkbox"/>                         |
|                                                                            | <b>Allow Promote</b><br><input type="checkbox"/>                                 |
|                                                                            | <b>Allow Select Existing Document</b><br><input type="checkbox"/>                |

**Property Mapping** **Valid Linked Items**

**Office Document References** ☆

[Add] [Settings] [Remove] [Search] [X] [Hidden] [Refresh] [More]

| Label | Item Type [...]               | Property [...]             | Description [...]            | Foreign Data ... |
|-------|-------------------------------|----------------------------|------------------------------|------------------|
| Part  | <a href="#">Part Document</a> | <a href="#">related_id</a> | Part - Document Relationship |                  |

## 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 a **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**:

| Property Mapping Valid Linked Items                                                                                        |                 |               |                          |                          |                                     |                                     |
|----------------------------------------------------------------------------------------------------------------------------|-----------------|---------------|--------------------------|--------------------------|-------------------------------------|-------------------------------------|
| MSO_DocumentType PropertyMap                                                                                               |                 |               |                          |                          |                                     |                                     |
| <div> <div>+</div> <div>×</div> <div>🔍</div> <div>✕</div> <div>Hidden</div> <div>🔗</div> <div>🖥️</div> <div>🌐</div> </div> |                 |               |                          |                          |                                     |                                     |
| Order                                                                                                                      | Office Property | Aras Property | Use Template             | Direction                | Create                              | Update                              |
| 128                                                                                                                        | Aras Created On | created_on    | <input type="checkbox"/> | From Aras to Office File | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| 256                                                                                                                        | Title           | name          | <input type="checkbox"/> | From Office File to Aras | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| 384                                                                                                                        | Aras Author     | created_by_id | <input type="checkbox"/> | From Aras to Office File | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| 512                                                                                                                        | Title           | name          | <input type="checkbox"/> | From Aras to Office File | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| 640                                                                                                                        | Subject         | description   | <input type="checkbox"/> | From Office File to Aras | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 768                                                                                                                        | Aras Document   | item_number   | <input type="checkbox"/> | From Aras to Office File | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 896                                                                                                                        | Revision        | major_rev     | <input type="checkbox"/> | From Aras to Office File | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

- **Office Property:** This is the property's **Name** within the Office file. It can be either a standard property (such as **Title** or **Subject**) or a custom property (such as **Aras Author**). When mapping from Office File to Aras, this property must exist in the file. When mapping from Aras to Office File, if the property does not exist, it will be automatically created as a custom property.

When mapping to and from Excel Cells, this value is the name of a **Named Cell**.

- **Aras Property:** The property's Name is within the Aras **ItemType** definition. It must exist for either mapping direction or an error will occur.
- **Use Template:** If enabled, the corresponding property value from the Template **Document** will be set into the newly created **Document**. See the *Mapping Properties from Linked Items*



section for details.

- **Direction:** The following table shows all valid mapping directions and which Office applications they work in:

| Direction                | Word | Excel | PowerPoint |
|--------------------------|------|-------|------------|
| From Office File to Aras | X    | X     |            |
| From Aras to Office File | X    | X     |            |
| From Aras to Excel Cell  |      | X     |            |
| From Excel Cell to Aras  |      | X     |            |

For example, to set up a mapping that maps from all MS Office applications to Aras, use “From Office File to Aras”, whereas if you want the mapping to apply only for Word, use “From Word to Aras”.

- **Create and Update:** The checkboxes in these columns define which events the mappings occur. **Create** refers to the initial save to Aras, and **Update** refers to subsequent saves to Aras.

Some important points about Property Mapping:

- Mappings can be one way on **Create** and another on **Update**. The default mapping for **Title** is an example. This means that the initial **Title** is established from the Office file during the first save to Aras, but after that, Aras is the source of any changes to the **Title**.
- The same property must not be mapped on the same event in both directions.
- 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, from Word to Aras, from Excel to Aras, from PowerPoint to Aras, and from Excel Cell to Aras.



## Mapping to and from Excel Cells

The mapping directions **From Aras to Excel Cell** and **From Excel Cell to Aras** allow connecting worksheet cell values to properties in Aras. This can be used, for example, to drive a calculation in Excel from values coming from Aras. When using these options, the value specified in the **Office Property** column is the name of a named cell in Excel. To name a cell in Excel, select the cell, right-click, and select **Define Name....** The mapping directions **From Aras to Excel** and **From Excel to Aras** map to and from Custom Properties in the Excel file, rather than cells.

## Special Mapping Properties

Some special mapping properties that perform specific functions in the connector are supported. They are summarized in the following table:

| Special Property Name | Description                                                  | Property Data Type in Aras | Valid Mapping Directions                                                                           |
|-----------------------|--------------------------------------------------------------|----------------------------|----------------------------------------------------------------------------------------------------|
| \$MSO_HasComments     | Set ON if the current Office file has active comments        | Boolean                    | From Office File to Aras From Word to Aras From Excel to Aras From PowerPoint to Aras              |
| \$MSO_HasChanges      | Set ON if the current Office file has active tracked changes | Boolean                    | From Office File to Aras From Word to Aras From Excel to Aras <i>(not supported in PowerPoint)</i> |

To use any of these special properties, a property must be defined with the required data type on the **ItemType** corresponding to the **Document Type**. Then, create a row in the **Property Mapping** where the **Special Property Name** is set in the **Office Property** column.

## 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:

| Properties                                                                                                                        |                       |           |                   |                        |
|-----------------------------------------------------------------------------------------------------------------------------------|-----------------------|-----------|-------------------|------------------------|
| RelationshipTypes Views Server Events Actions Life Cycles Workflows TOC Access TOC View                                           |                       |           |                   |                        |
| Properties ▾ ☆                                                                                                                    |                       |           |                   |                        |
| <div> <div>+</div> <div>×</div> <div>🔍</div> <div>✖</div> <div>Hidden ▾</div> <div>🔗 ▾</div> <div>🖥 ▾</div> <div>🌐 ▾</div> </div> |                       |           |                   |                        |
| 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.



## 1. Set up **Foreign Data Source** for Linked Items.

The Aras Office 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 <b>Valid Linked Items</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |             |                       |                |                                      |                  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-----------------------|----------------|--------------------------------------|------------------|
| Office Document References ☆                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |             |                       |                |                                      |                  |
|       Hidden ▾  ▾  ▾  ▾ |             |                       |                |                                      |                  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | 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. Notice 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 Office 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.

## 2. Set up **Property Mappings**.

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

Property Mapping
Valid Linked Items

MSO\_DocumentType PropertyMap
☆

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Simple
🔍
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🌐

| Order | Office Property       | Aras Property         | Use Template             | Direction                | Create                              | Update                              |
|-------|-----------------------|-----------------------|--------------------------|--------------------------|-------------------------------------|-------------------------------------|
|       | link*                 |                       |                          |                          |                                     |                                     |
| 900   | Linked Part Number    | linked_part_number    | <input type="checkbox"/> | From Aras to Office File | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 901   | Linked Project Number | linked_project_number | <input type="checkbox"/> | From Aras to Office File | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

## General Administration Topics

This section contains several topics pertinent to configuring Aras Innovator for the best use of the Aras Office Productivity Connector.

### ItemType Configuration

The Aras Office Productivity Connector is designed to work with any ItemType as the base Item. Still, certain configuration steps must be followed to prepare this ItemType for use by the Connector. All this configuration is already included for the standard Document ItemType within Aras Innovator. To configure the Aras Office Productivity Connector to work with an ItemType other than Document, following the Document ItemType as an example is recommended. Configuration of an ItemType for the Aras Office Productivity Connector includes the following topics:

- Properties Necessary for Aras Office Connector

| Name           | Label           | Data Type              | Length          | Hidden | Hidden2 |
|----------------|-----------------|------------------------|-----------------|--------|---------|
| authoring_tool | Authoring Tool  | List (Authoring Tools) |                 |        |         |
| external_id    | External Id     | String                 | 256             | X      | X       |
| external_owner | External Owner  | String                 | 128             | X      | X       |
| external_type  | External Type   | String                 | 128             | X      | X       |
| from_template  | From Template   | Item (base item)       |                 |        |         |
| is_template    | Template        | Boolean                |                 |        |         |
| Item_number    | <i>Optional</i> | String                 | <i>Optional</i> |        |         |

#### Important

None of these properties must be visible on the Form of the Base **ItemType**, but they are typically useful in showing the **Authoring Tool**, **Template**, and **From Template**.

- On any Relationship between the Base **ItemType** and **File** (For example, **Document File**).

| Name           | Label          | Data Type | Length | Hidden | Hidden2 |
|----------------|----------------|-----------|--------|--------|---------|
| external_id    | External Id    | String    | 256    | X      | X       |
| external_owner | External Owner | String    | 128    | X      | X       |
| external_type  | External Type  | String    | 128    | X      | X       |



- On any Relationship between a **Valid Linked ItemType** and the **Base ItemType** (For example, **Part Document**).

| Name           | Label          | Data Type | Length | Hidden | Hidden2 |
|----------------|----------------|-----------|--------|--------|---------|
| external_id    | External Id    | String    | 256    | X      | X       |
| external_owner | External Owner | String    | 128    | X      | X       |
| external_type  | External Type  | String    | 128    | X      | X       |

- Classification

**Document Types** can make use of **ItemType classification** if desired. **Classification** values defined on the **ItemType** will be available when defining **Document Types**. This requires configuring the **Class Structure** of the **Document ItemType**. Existing on-site **Document Classes** can be used, or new ones specifically for use with the Aras Office Productivity Connector can be added.

## Managing Office Files already in Aras Innovator

Office files previously stored manually in Aras Innovator can be easily managed going forward using the Aras Office Connector with minimal configuration. The necessary steps are:

- Ensure all properties listed in the *ItemType Configuration* section are included on the **ItemTypes** and **Relationships**.
- The Authoring Tool property of each existing document must be set equal to the corresponding Office application. For example, if the Document contains an Excel `.xlsx` file, then the Authoring Tool must be set to **Microsoft Excel**. This is necessary for the **Open** command to find valid Documents. If assistance is needed in setting this value for existing Documents in the system, please contact Aras Support.
- Configure the necessary **Document Types** in Office Connector Settings that correspond to the **ItemTypes** and **Classifications** currently used in the system to manage Office files. Refer to the *Document Types* section for details.

### Important

Aras Office Productivity Connector only manages one Native File and one Viewable File per Item. Additional files can be attached to the Item but will be effectively ignored by the connector.



## Template Document Management

A **Template Document** in Aras is a regular **Document** with the **Template** checkbox checked. It contains an Office file that can be used as the basis of any new file created from the template. The Office file used for the template should be in a regular file format (like **.docx** , **.xlsx** , or **.pptx** ). There are two methods for creating **Template Documents**: manually in the Aras web client or by marking a **Document** created by the Aras Office Connector as a template. Either method requires some work in the Aras web client, as it is not possible to create a template completely using the Aras Office Productivity Connector.

### Creating a Template Document manually

1. Create the template file in the Office application and save it locally.
  1. Log into the Aras web client.
  2. Create a new **Document** (or similar item defined as an Office **Document Type**).
  3. Set the following properties:
    - Number
    - Type
    - Authoring Tool
    - Template checkbox ON
  4. Attach the template file to the **Files** tab.
  5. Save and close the **Document**.

### Creating a Template Document using the Aras Office Productivity Connector

1. Create a Document using the connector. Use either of these two approaches:
  - Click **New** and **New Aras Document** to create a new file, create the file contents, and then click **Save and Saveto Aras**.
  - Create the file contents locally, then click **Save and Saveto Aras**.
  1. Log in to the Aras web client.
  2. Search for the **Document** that was just created and open the form.
  3. Set the Template checkbox ON.
  4. Remove any viewable file if it exists.
  5. Save and close the **Document**.

At this point, the template is ready to be used by the Aras Office Productivity Connector. Regardless of the method used, the result is a **Document** that has the following key properties set:



T-0011 ☆

Edit ↻ ↺ | ↻ | 📁 | 📁 | ... Open in Office

Document

Document Number: T-0011 Revision: A State: Preliminary Assigned Creator:

Name: Product Specification Template Designated User:

Type: Product Authoring Tool: Microsoft Word Version: Effective Date:

Description: From Template:

☒ Files Attached  
☐ Changes Pending  
☒ Template

Files Changes

Files ☆

⚙️ 🔍 Hidden | 📁 | 📁 | ...

| Related File [...]                  | File Type [...] | Comments | Sequence ↑ | Is Shared                           | Indexed On [...] |
|-------------------------------------|-----------------|----------|------------|-------------------------------------|------------------|
| Product Specification Template.docx | Microsoft Word  | Approved | 1          | <input checked="" type="checkbox"/> |                  |

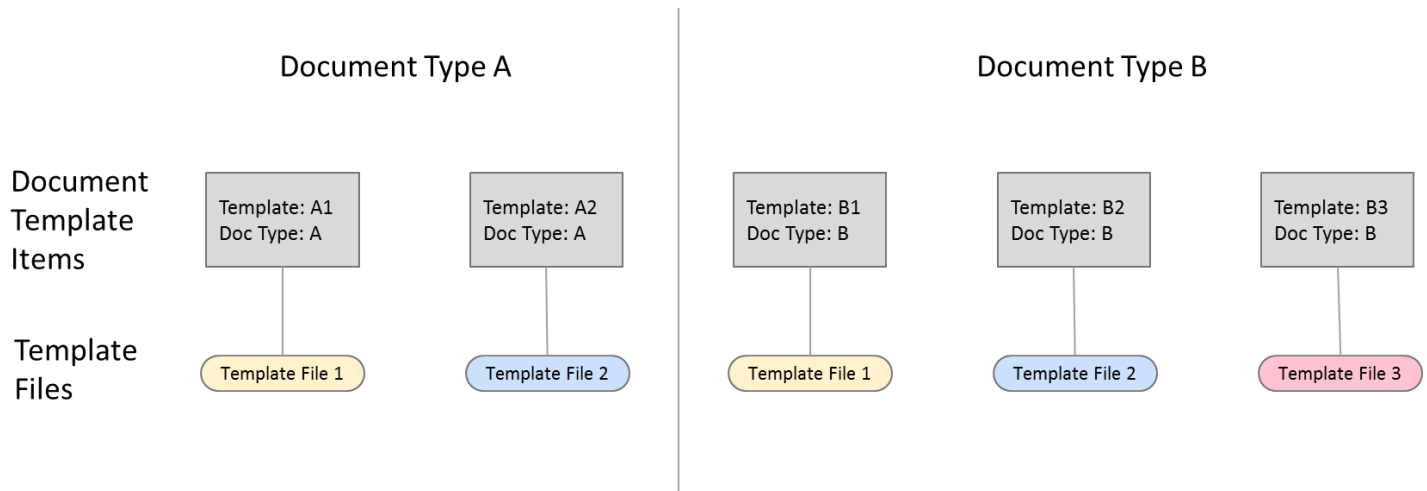
These properties are used for the following purposes:

- **Document Number:** The main identifier for the template. It will appear in the Aras ribbon.
- **Type:** Sets the **Document Type** for which the template is intended. The template will only be listed when that **Document Type** is selected in the **New Aras Document** dialog.
- **Authoring Tool:** Controls the Office application for which the template will be used. The template will only appear in the **New Aras Document** dialog when in that application.
- **Template:** Marks this **Document** as a template.
- **File:** The file used when the user creates a **New Aras Document** using this template.

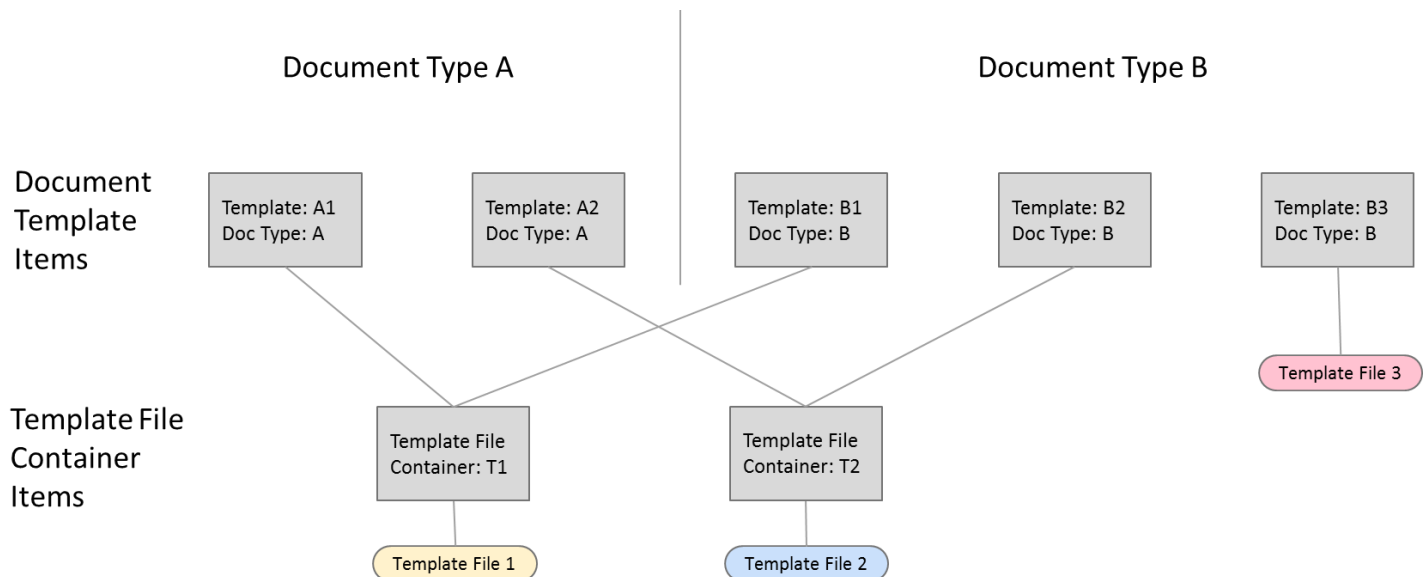
### Using Template File Containers



Using **Template File Containers** is an advanced approach to template management that allows the sharing of a common template file across multiple **Template Documents**. In the standard approach to template management described previously, if the same template file is to be used in multiple **Template Documents**, it must be copied like this:



Multiple **Template Documents** can share template files using **Template File Containers**. The existing approach can still be used, as shown in **Template B3**.



To use **Template File Containers**, a new Item **Property** must be created with the **Name** `template_file_container`, and **Data Source** equal to your **Document ItemType**. Here is an example



showing the **Property** defined for the standard **Document ItemType**:

| Properties RelationshipTypes Views Server Events Actions Life Cycles Wo                                                                                                                                          |                         |           |                   |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|-----------|-------------------|
| <div> <div>Properties</div> <div> <div>+</div> <div>×</div> <div>Q</div> <div>✕</div> <div>Hidden</div> <div> <div>Q</div> <div>✕</div> <div>Q</div> <div>✕</div> <div>Q</div> <div>✕</div> </div> </div> </div> |                         |           |                   |
| Name ↑                                                                                                                                                                                                           | Label                   | Data Type | Data Source [...] |
| template_file_container                                                                                                                                                                                          | Template File Container | Item      | Document          |

To create a **Template File Container**, simply create a Document and attach the template file to it. Then, create **Template Documents** and set the **Template File Container** value to point to the **Container** Item. This can be done as many times as desired.

aras INNOVATOR

GEN-TFC

GEN-TFC

Edit

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Open in Office

Document

Document Number

GEN-TFC

Revision

A

State

Preliminary

Assigned Creator

Template File Container

Name

General Template File Container

Designated User

Type

General

Authoring Tool

Microsoft Word

Version

Description

Effective Date

From Template

Files Attached

Changes Pending

Template

Files

Changes

Files

Q

✕

Q

✕

Q

✕

Q

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Q

✕

Related File [...]

File Type [...]

Comments

Sequ...

Is Shared

Indexed On [...]

DCG Product Spec Template.docx

Microsoft Word

1

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Page: 1 of 1

1 Results

Template file is here

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GEN-T1

GEN-T1

Edit

↺

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Q

✕

Hidden

Q

✕

Q

✕

Q

✕

Open in Office

Document

Document Number

GEN-T1

Revision

A

State

Preliminary

Assigned Creator

Template File Container

Name

General Template 1

Designated User

Type

General

Authoring Tool

Microsoft Word

Version

Description

Effective Date

From Template

Files Attached

Changes Pending

Template

Files

Changes

Files

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Q

✕

Q

✕

Q

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Q

✕

Related File [...]

File Type [...]

Comments

Sequ...

Is Shared

Indexed On [...]

Page: 1 of 1

0 Results

No file here



Note that the **Template File Container** does not need to be a **Template Document**, as shown in the previous example, although either way is valid. This is controlled by whether the **Template** flag is set on the **Template File Container**. The **Template File Container** does not need to be of the same **ItemType** or **Classification** as the Template itself, which provides flexibility for reusing Template Files. However, the **container ItemType** and **Classification** do need to match some valid Aras Office Productivity Connector **Document Type**.

### Administrator Topics for Template Documents

The following are a few topics about **Template Documents** that apply to administrators only:

- The template capability in the Aras Office Productivity Connector is designed to be used by anyone in the organization. It is not inherently an administrator-only function. However, as an administrator you can control the ability for users to create templates by restricting their ability to set the **is\_template** Property **ON**. This Property is how Aras Productivity Connector determines which **Documents** are Templates. Access to this Property can be restricted in several ways, such as removing it from the Form, setting it to **disabled** on the Form, or defining a client-side **Method** to control the ability to set the checkbox.
- Users can be prevented from modifying **Template Documents** using standard Aras **Permissions** and **Life Cycle** States. For example, if the **Template Document** is in the **Released** state, users will typically not be able to modify it.

### Office Property Creation

For a complete description of working with properties inside Office files, refer to the *Property Mapping* section of the *Aras Office Connector 22 – User Guide*.

### File Management

Files managed by the Aras Office Productivity Connector are kept in the default working folder. The default location is the **Documents** folder. The Aras Office Productivity Connector does not affect the ability to use the normal Office **Save** and **Open** commands. Even when managing files in Aras, the files can still be saved and opened locally.

### Using Aras Office Productivity Connector with Visual Collaboration



The Aras Office Productivity Connector's automatic PDF generation capability is designed to work with Aras Visual Collaboration, enabling all organization users to view and mark up document content easily. Please refer to the *Aras Innovator 22 – Visual Collaboration Administrator Guide* for details on configuring Aras Visual Collaboration.

## Configuring the SharePoint Integration

The SharePoint integration within the Aras Office Productivity Connector allows your organization to manage documents within Aras and collaborate on updates inside SharePoint. To configure the SharePoint integration:

1. From the **TOC**, expand **Productivity Suite** and **Integration Framework**, then select **Integrations**.
  1. Open the **SharePoint Integration** for editing.
  2. In the **Integration Information** section, specify the **SharePoint** Certificate.



Integration Information

Basic

Integration Name \*

SharePointIntegration

Integration Type

✓ ✕

Description

State

In Progress

Remote Types Method \*

[spi\\_ArasToSharePointRegistration](#)

✓ ✕

Queue

[SharePointIntegration](#)

✓ ✕

SharePoint Certificate

Access Token Method

✓ ✕

- In the **Integration Configurations** section, specify the appropriate property values for the organization under the **Properties** Tab and the appropriate secrets under the **Secrets** Tab.

Integration Configurations

Properties Secrets







Hidden 



| Property Name    | Property Value |
|------------------|----------------|
| client_id        |                |
| client_secret    |                |
| tenant_id        |                |
| document_library |                |
| host             |                |
| scheme           |                |
| authority        |                |
| site_path        |                |
| spPassword       |                |

- **client\_id**: Azure AD Application (client) Id.
- **client\_secret**: Azure AD Application Client Secret.
- **tenant\_id**: Azure AD Application Directory (tenant) Id.
- **document\_library**: The name of the Document Library within SharePoint where **Documents** will be stored.
- **host**: The main URL for the SharePoint site.
- **scheme**: The protocol for connecting to your SharePoint site.
- **authority**: The authentication authority for accessing SharePoint, such as **AzurePublic** or other designated authentication authorities.
- **site\_path**: The specific path to the SharePoint site within the SharePoint environment. The site path is usually formatted as `sites/[SiteName]` and directs the SharePoint integration to the correct sub-site within the SharePoint domain.
- **spPassword**: Password set while creating a self-signed certificate.



# Installation Guide



## Overview

This document provides detailed instructions for installing the Aras Office Productivity 22 integration between Aras Innovator and Microsoft Office. The steps described in this document are intended to allow a novice administrator to install Aras Office Productivity Connector 22. However, more general knowledge of system administration, network deployment, and Aras Innovator administration is recommended.

These are the basic steps to fully install the Aras Office Productivity Connector 22.

1. Install Aras Innovator.
2. Install Aras Office Connector components in Aras Innovator.
3. Install Aras Office Productivity Connector 22 components to Microsoft Office.

### Important

The following procedures are based on new Microsoft Office and Aras Innovator installations. Contact the vendor for assistance if working with a customized instance of either product.



## Installing Aras Innovator

The first step in installing Aras Office Productivity Connector is to set up the Aras Innovator instance that will be used. This section describes the three major steps for setting up your Aras Innovator instance with Aras Office Productivity Connector 22.

### Aras Innovator

The first step is to install Aras Innovator. Subscribers can get the Aras Innovator CD Image from the [Aras MFT](#) site in the `InnovatorLatestRelease` folder.

The installation documentation for the Aras Innovator instance is in the `Documentation` folder of the Aras Innovator CD Image.

At the time of release, the following versions of Aras Innovator is supported by the Aras Office Productivity Connector 22:

- Aras Innovator 22-26

If using an earlier version of Aras Innovator, please upgrade before installing the Aras Office Productivity Connector 22.

For upgrade assistance, consult Aras Support (Please contact Aras Support at the Aras Subscriber Portal) before installing the Aras Office Productivity Connector.

### Confirming the Aras Innovator Installation

Use the following procedure to check if the Aras Innovator Code Tree and database meet the minimum requirements to apply the Aras Office Productivity Connector Solution AML:

1. Log in to Aras Innovator as an administrator.
2. Click the **User** icon in the top-right corner and select **About**.
3. Confirm that the dialog shows one of the following:
  - Release 22
  - Release 23
  - Release 24



- Release 25
  - Release 26
4. Close the dialog.
  5. From the **TOC**, expand **Administration** and select **Variables**.
  6. Confirm that the following variables are listed:

| Version Major | Version Minor | VersionServiceUpdate | VersionLabel |
|---------------|---------------|----------------------|--------------|
| 14            | 0             | 8                    | Release 22   |
| 14            | 0             | 9                    | Release 23   |
| 14            | 0             | 10                   | Release 24   |
| 14            | 0             | 11                   | Release 25   |
| 14            | 0             | 12                   | Release 26   |

## Feature License Key

Aras Office Productivity Connector 22 requires a Feature License to run. To check whether a valid Feature License exists in the Aras Innovator Database:

1. Log into Aras Innovator as an administrator.
  1. From the TOC, expand Administration and select Feature Licenses.
  2. The Aras Office Productivity Connector 22 is activated with the **Aras.OfficeProductivityConnector** Feature License. If a feature license is found, check the expiration date to confirm it is still active.

## Requesting a Feature License

To request a feature license activation key, customers with an active Aras subscription can send an email to [licenses@aras.com](mailto:licenses@aras.com) or the account representative using the following format:

- Subject: Aras Office Productivity Connector Activation Key Required
- Body: Version of Aras Innovator

A reply containing the Feature License activation key will be sent.

## Installing the License

After the activation key is acquired, install the feature license as follows:

1. Log into Aras Innovator as an administrator.
2. Click the **User** icon in the top-right corner and select **Activate Feature**.

**Activate Feature** ✕

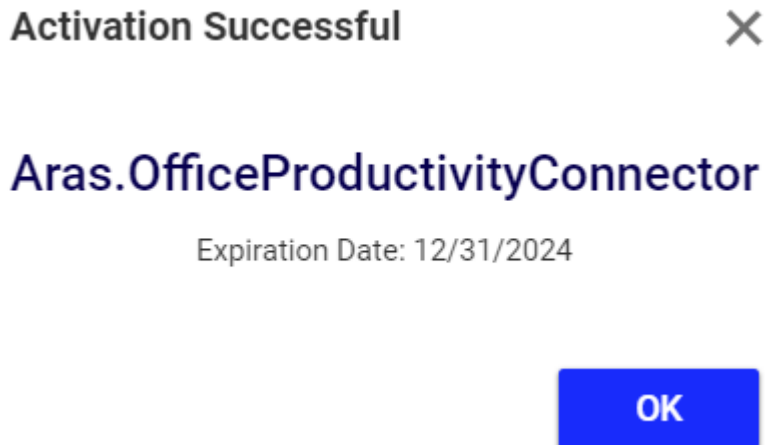
Activation Key

Activate

Cancel

3. Paste the acquired activation key and click the **Activate Feature** button.

A success message similar to the following will appear.



## Installing Aras Office Connector Server Components

Once the installation of Aras Innovator is complete and confirmed, the Aras Innovator database must be modified with the metadata required to run the Aras Office Productivity Connector 22. Before applying these changes, confirm that all required components are present.

- Aras Innovator 22-26
- Aras Office Productivity Connector Feature License
- Aras Update Tool 1.23

or

- Aras Innovator Package Import Export Utilities

## Notification and Backup

1. Notify users that the system will be down at a scheduled time and that they should log out before the process starts.

### Important

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

1. Backup the Code Tree.

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

```
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    | 1 KB |
|  InnovatorServerConfig   | XML File    | 2 KB |
|  SelfServiceReportConfig | XML File    | 1 KB |
|  VaultServerConfig      | XML File    | 1 KB |

The following steps can be used to confirm the installation folder:

- From the Windows search field, enter **Control** to access the **Control Panel**.
- Select **Programs and Features**.
- Right-click the **Name** column and select **More...**
  1. Select the **Comments** header if it has not been checked.
  2. Click **OK**.
    - Search for the **Aras Innovator** entry in the **Programs and Features** window.
    - View the value set in the **Comments** column for the Aras Innovator entry:

| Organize ▾ Uninstall                                                                               |                  |              |         |           |                                                         |
|----------------------------------------------------------------------------------------------------|------------------|--------------|---------|-----------|---------------------------------------------------------|
| Name                                                                                               | Publisher        | Installed On | Size    | Version   | Comments                                                |
|  Aras Innovator | Aras Corporation | 10/22/2024   | 1.24 GB | 14.0.15   | Installed to C:\Aras Installations\Innovator\Release27\ |
|  Aras Update    | Aras Corporation | 7/26/2024    | 42.1 MB | 1.23.1357 | Aras Update                                             |

After verifying the Code Tree installation path, back up the folder and all its contents.



2. 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 `<DB-Connection...` to `<xDB-Connection...` and restart the **w3svc service (IIS)**. This expires all sessions and prevents all new connections to the Aras Innovator database through the existing instance.

3. Backup the database.

Store these files in a safe location, as they will need to be restored if the process fails.

4. Enable database connections.

After the database backup has been completed, enable the database connection string in the `InnovatorServerConfig.xml` by changing it from `<xDB-Connection...` to `<DB-Connection...` and restarting the **w3svc service (IIS)**.

## Installing Aras Office Productivity Connector 22

### Important

Aras Office Productivity Connector leverages Aras Office Connector components in Aras Innovator. Confirm Aras Office Connector components are applied before installing Aras Office Productivity Connector. Refer to the *Applying the Aras Office Connector AML Package* section of the *Aras Office Connector – Installation Guide* for steps on applying Aras Office Connector components.

Aras Office Productivity Connector 22 can be installed using the Automated Installation Option (using the **Aras Update** Tool) or the Manual Installation Option (using the **Aras Import** Tool).

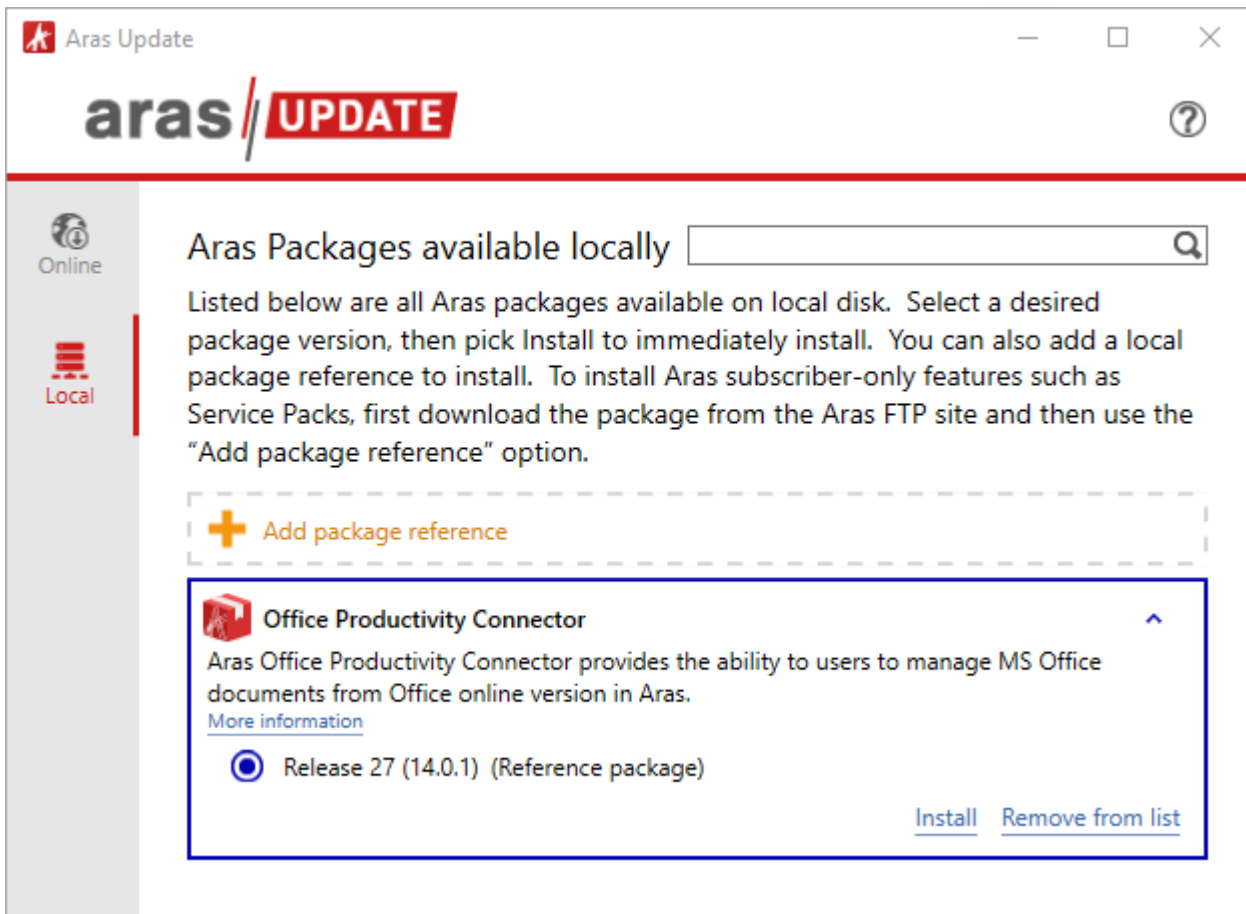
### Automated Installation Option

1. Download the Aras Office Productivity Connector 22 CD Image from the [Aras MFT](#) site and unzip the file on the local computer.
  1. Enable the **Super User** login.
  2. Launch the **ArasUpdate.exe** file as administrator.

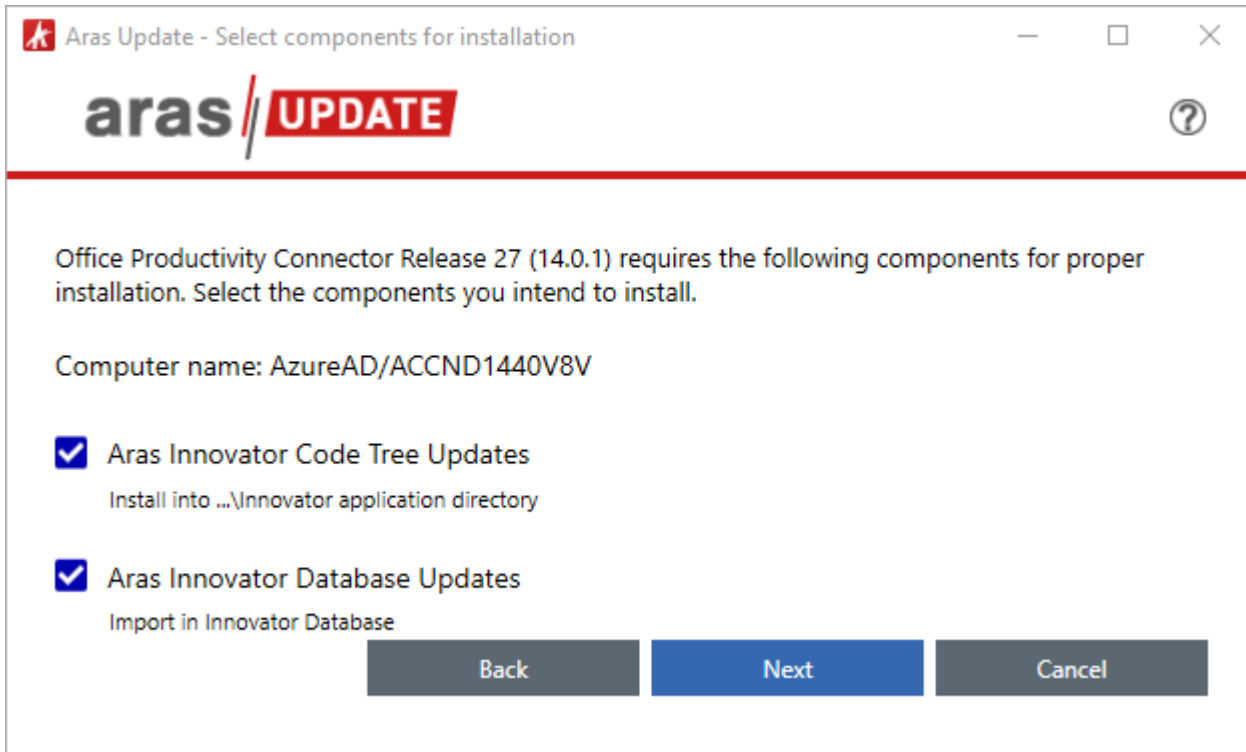


If default options were selected during installation, the **ArasUpdate.exe** file can be found in the **C:\Program Files (x86)\Aras\Aras Update\** directory.

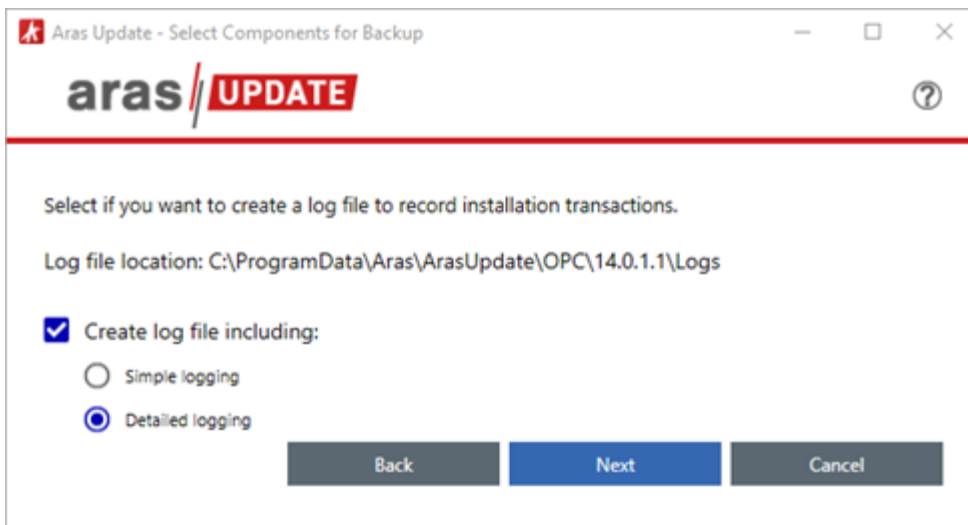
3. On the **Local** tab, click **Add package reference** and navigate to the folder where the Aras Office Productivity Connector 22 package was extracted from the first step.
4. Expand the Aras Office Productivity Connector package and click **Install**.



5. Select **Aras Innovator Code Tree Updates** and **Aras Innovator Database Updates** options and click **Next**.

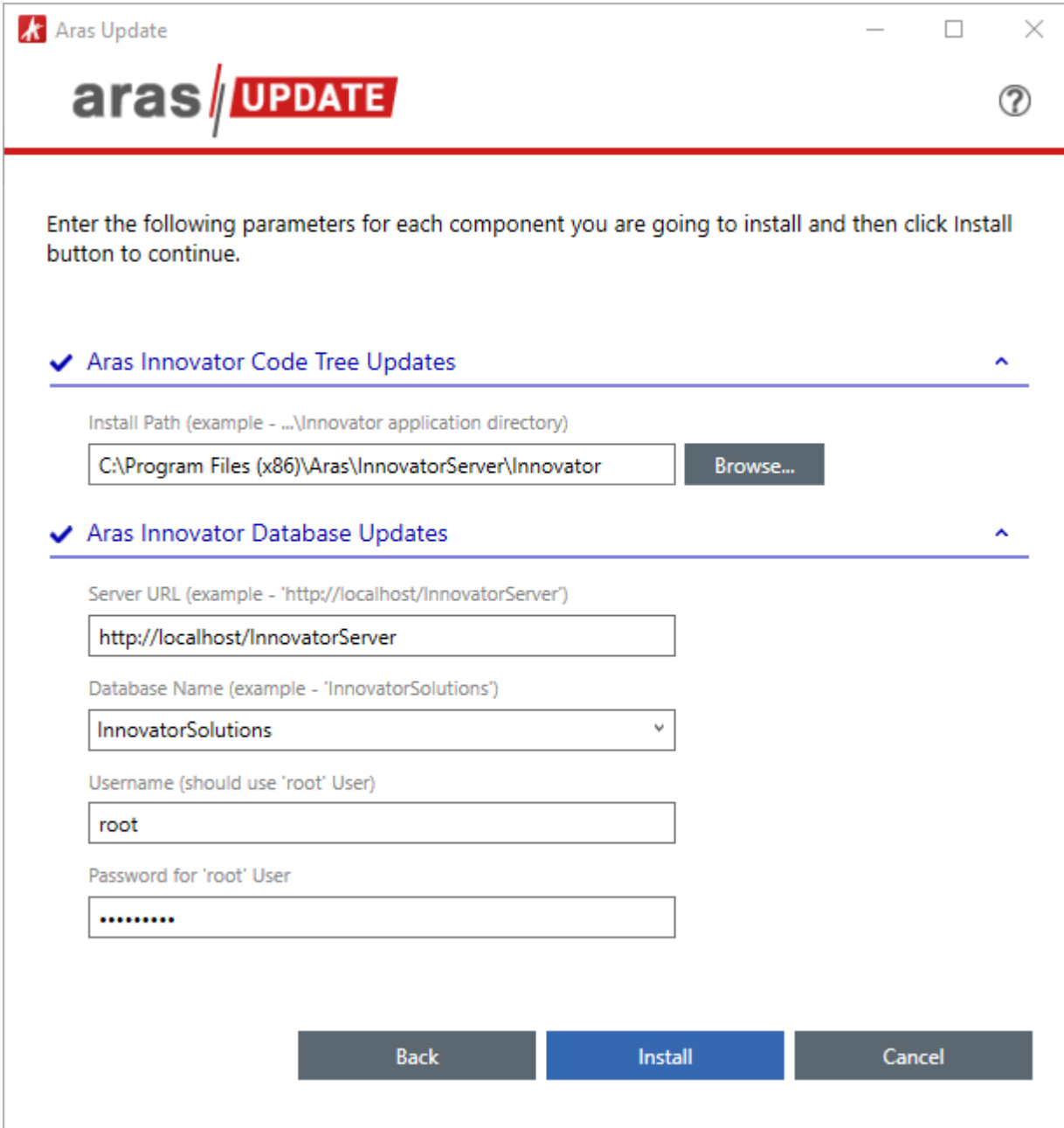


6. Select the **Detailed logging** option and click **Next**.



The logging option records the installation attempt and can be used to troubleshoot issues.

7. Input the connection information and click **Install**.



**Aras Update**

**aras / UPDATE**

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

✓ **Aras Innovator Code Tree Updates**

Install Path (example - ...\\Innovator application directory)

C:\\Program Files (x86)\\Aras\\InnovatorServer\\Innovator Browse...

✓ **Aras Innovator Database Updates**

Server URL (example - 'http://localhost/InnovatorServer')

http://localhost/InnovatorServer

Database Name (example - 'InnovatorSolutions')

InnovatorSolutions

Username (should use 'root' User)

root

Password for 'root' User

.....

Back Install Cancel

- **Install Path:** The physical path to the Aras Innovator code tree
- **Server URL:** The connection URL for Aras Innovator
- **Database:** The target Aras Innovator database
- **Username:** root
- **Password:** Password for “root” login (Default is “innovator”)



**Aras Update** will import everything required for Aras Office Productivity Connector 22.

8. After the import is complete, disable the **Super User** login.

### Manual Installation Option

1. Download the Aras Office Productivity Connector 22 CD Image from the [Aras MFT](#) site and unzip the file on the local computer.
  1. Copy DLLs from the `..\Files\Innovator\Server\bin` folder to the `Innovator\Server\bin` folder and update `method-config.xml`.
  2. Copy content from the `..\Files\Innovator\Client` folder to the `Innovator\Client` folder.
  3. Use the Package Import Export Utilities to import the Aras Office Productivity Connector 22 database package. For more information about using this tool, please see the Aras Innovator 22 – *Package Import Export Utilities* documentation.
2. Enable the **Super User** login to perform this step.
  - Browse to the `\PackageImportExportUtilities\Import\` folder and run the **Import.exe** file as administrator.



- Enter the following information:
  - **Server:** The connection URL for Aras Innovator
  - **Database:** The target Aras Innovator database
  - **Username:** root
  - **Password:** Password for “root” login (Default is “innovator”)
  - **Target Release:** OPC22
  - **Description:** Aras Office Productivity Connector 22
  - **Manifest File Path:** The manifest file `\Office Productivity Connector 22 CD Image\Imports\imports.mf`
  - **Available for Import:** Select All Packages
  - **Type:** Merge
  - **Mode:** Thorough Mode
- Click the **Import** button.



Use the Package Import Export Utilities to import the Aras Office Productivity Connector 22 Post Import AML Scripts package.

The screenshot shows the 'Import' utility window with the following configuration:

- Innovator Server:** Server: `http://localhost/InnovatorServer` (Logout button)
- Release settings:** Target Release: `OPC27`, Description: `Aras Office Productivity Connector 27 Post Import AML Scripts`
- Manifest File:** Path: `C:\Aras downloads\Office Productivity Connector 27 CD Image\PostImportAMLScripts\Import Package\imports.mf` (Browse button)
- Available for Import:** ☒ Select All Packages. List: ☒ SMS PostAmlImport
- Language codes:** ☒ en
- Existing Packages in the Database:**
  - com.aras.defaults.filerepresentations
  - com.aras.innovator.access.common
  - com.aras.innovator.access.domain
  - com.aras.innovator.access.mandatory
  - com.aras.innovator.access.uservisibilit
  - com.aras.innovator.admin
  - com.aras.innovator.authenticationfram
  - com.aras.innovator.client.core
- Type:** ☒ Merge, ☐ Ignore
- Mode:** ☐ Fast Mode, ☒ Thorough Mode

3. Enter the following information:

- **Server:** The connection URL for Aras Innovator
- **Database:** The target Aras Innovator database
- **Username:** root
- **Password:** Password for “root” login (Default is “innovator”)
- **Target Release:** OPC22
- **Description:** Aras Office Productivity Connector 22 Post Import AML Scrips
- **Manifest File Path:** The manifest file `\Office Productivity Connector 22 CD Image\PostImportAMLScripts\Import Package\imports.mf`
- **Available for Import:** Select All Packages



- **Type:** Merge
  - **Mode:** Thorough Mode
4. Click the **Import** button.

## Configure Aras Office Productivity Connector 22 Redirect URL

1. Navigate to the Aras Innovator Code Tree.
  1. Open the `/Innovator/0AuthServer/0Auth.config` file for editing.
  2. Add a redirect URL for Aras Office Productivity Connector under the **redirectUris** section of the file.

```
<redirectUri value='https://${InnovatorURL}Client/Solutions/ OfficeProductivityConnector/taskpane.html?re
```

Replace `${InnovatorURL}` with the URL to the Aras Innovator instance being used.

## Confirming the Installation

Use the following procedure to check if the database has been updated correctly:

1. Log in to Aras Innovator as an administrator.
  1. From the **TOC**, expand **Administration** and select **Variables**.
  2. Confirm the following variable:

### Office Productivity Connector

14.0.0.22

If the installation fails at any time, revert to backups and contact Aras Support at the Aras Subscriber Portal.



## Installing the Aras Office Productivity Connector 22 Client Components

Aras Office Productivity Connector 22 must modify Microsoft Office to add the integration components. Before applying these changes, confirm that the installation of Microsoft Office meets the minimum requirements to run the Aras Office Productivity Connector 22 integration.

Requirements:

- Windows 8.1, Windows 10, or Windows 11
- Microsoft Edge WebView2
- Microsoft Office 2016 (Enterprise or Professional editions recommended)
- Microsoft Office 365, Desktop version
- Microsoft Office 2019 (Enterprise or Professional editions recommended)
- Microsoft Office 2021 (Enterprise or Professional editions recommended)

## Installing the Microsoft Office Add-In

### Install Aras Office Productivity Connector 22 for Organization

Aras Office Productivity Connector 22 can be deployed for use by an organization through the Microsoft 365 Admin Center. Please refer to the following Microsoft documentation: [Deploy add-ins in the Microsoft 365 admin center](#).

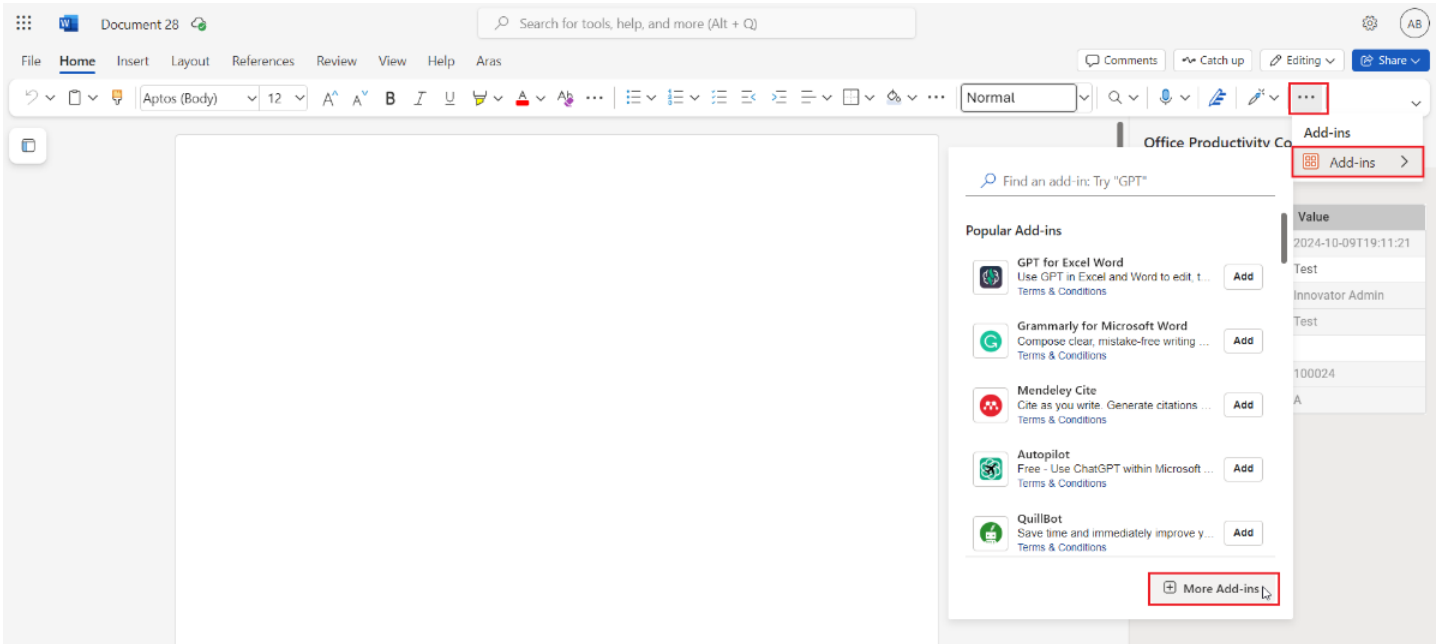
When prompted, select the **Upload custom apps** option and upload the Aras Office Productivity Connector 22 manifest files.

### Client Installation

Enable the Aras Office Productivity Connector 22 add-in

1. Navigate to Microsoft Office online.
2. Create a new document (e.g., New Word document)
3. Click on the **ellipsis (...)**, **Add-ins**, and **More Add-ins**.





- Click on **Admin Managed**. This will display the list of add-ins available at an organization level.

## Office Add-ins

MY ADD-INS | SHARED FOLDER | **ADMIN MANAGED** | STORE

- Select the **Aras** add-in and click **Add**. This will enable the application to use the Aras Office Productivity Connector.
- Repeat steps one through five for each Office application that will use Aras Office Productivity Connector.

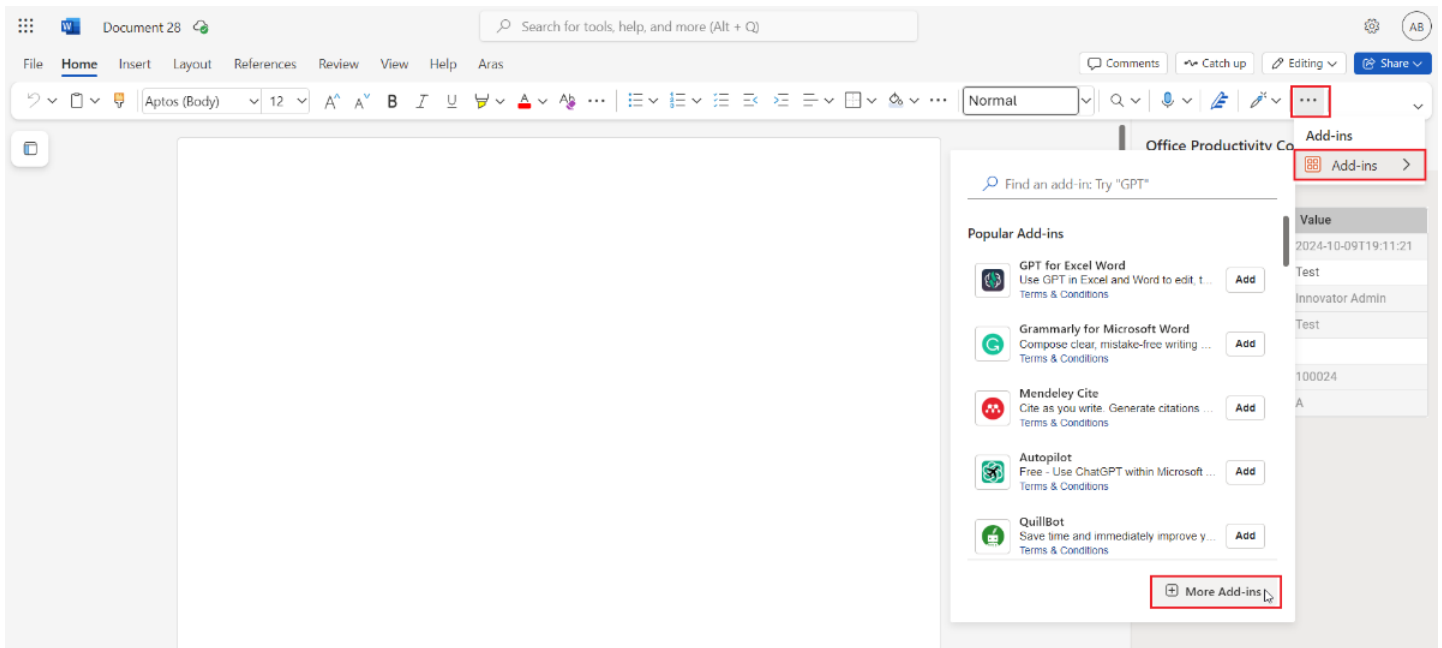
### Install Aras Office Productivity Connector 22 for Microsoft Online Applications Single User

To install Aras Office Productivity Connector 22 for a single user profile:

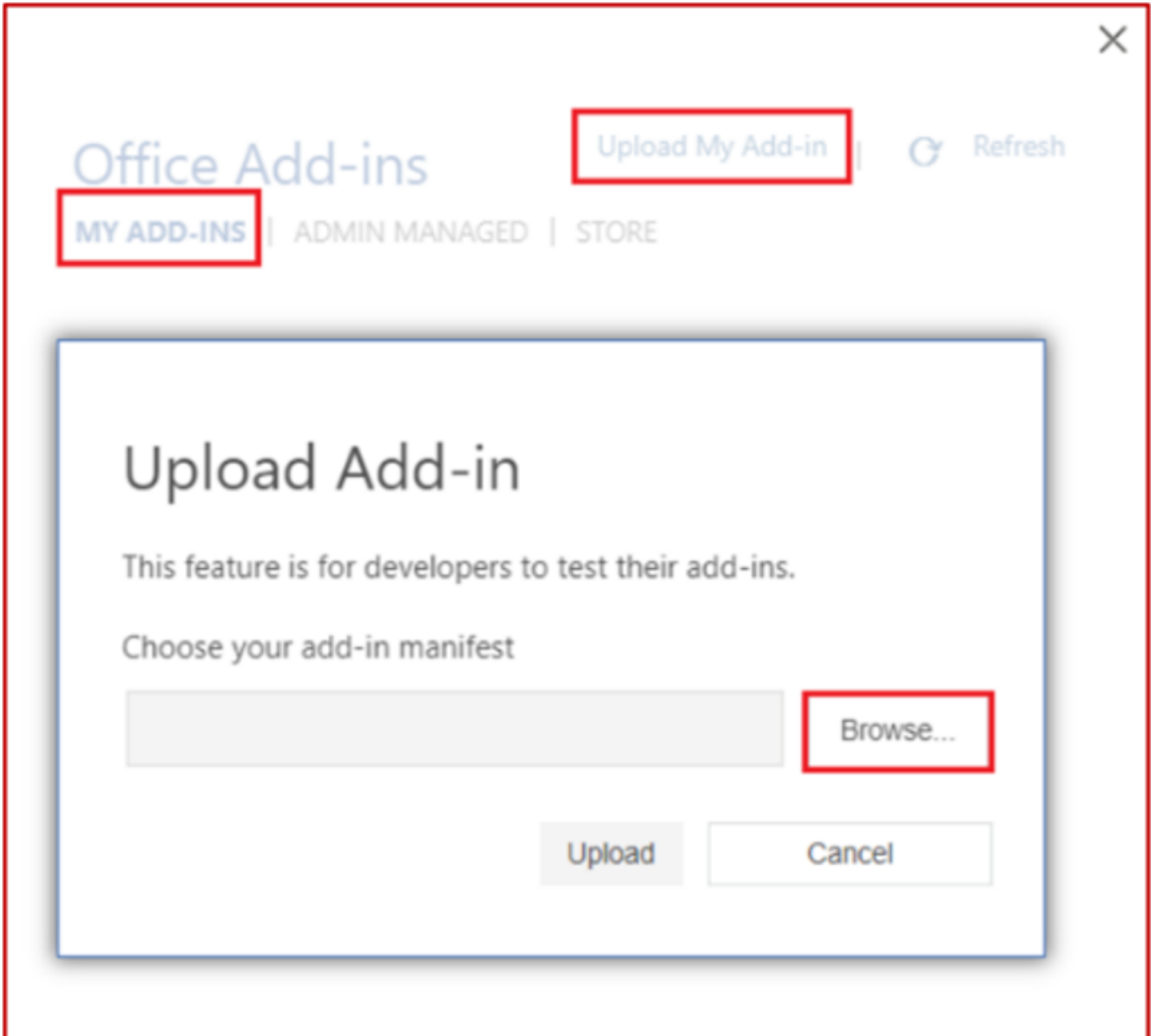
- Open the `ArasOfficeProductivityConnector_Copy.xml` from the `/Innovator/Client/Solutions/OfficeProductivityConnector/Manifest` folder.
  - Replace all instances of `{Innovator.URL}` with the URL for the Aras Innovator instance being used.
  - Save and close the `ArasOfficeProductivityConnector_Copy.xml` file.
  - Navigate to Microsoft Office online.



4. Create a new document (e.g., New Word document).
5. Click on the **ellipsis (...)**, **Add-ins**, and **More Add-ins**.



6. Click on **MY ADD-INS**, **Upload My Add-in**, and **Browse**.



7. Select the manifest file from Step 3 and click **Upload**.

#### Important

For single-user manual installations, if automatic browser cache clearing is enabled, the manifest file for the add-in will need to be re-uploaded each time the browser cache is cleared.

## Installing Aras Office Productivity Connector 22 for Microsoft Desktop Applications

1. Copy the `ArasOfficeProductivityConnector_Copy.xml` from the `/Innovator/Client/Solutions/OfficeProductivityConnector/Manifest` folder of the Aras Office Productivity Connector 22 CD Image to an alternative location.
  1. Open the `ArasOfficeProductivityConnector_Copy.xml` for editing.
  2. Replace all instances of `{Innovator.URL}` with the URL for the Aras Innovator instance being used.
  3. Save the `ArasOfficeProductivityConnector_Copy.xml` file.
  4. Open Microsoft Office desktop application (e.g., Word).
  5. From the **File** menu, select **Options**, **Trust Center**, and **Trust Center Settings**.
  6. Select **Trusted Add-in Catalogs**.



Trust Center ? X

Trusted Publishers

Trusted Locations

Trusted Documents

Trusted Add-in Catalogs

Add-ins

ActiveX Settings

Macro Settings

Protected View

Message Bar

File Block Settings

Privacy Options

Form-based Sign-in

### Trusted Web Add-in Catalogs

Use these settings to manage your web add-in catalogs.

☐ Don't allow any web add-ins to start.

☐ Don't allow web add-ins from the Office Store to start.

☐ Next time Office starts, clear all previously-started web add-ins cache.

### Trusted Catalogs Table

You should only add a catalog if you trust its owner. You may also select one of each catalog type to show in the insert add-in menu. We will automatically start web add-ins from your insert add-in menu catalogs when opening documents.

Catalog Url:  Add catalog

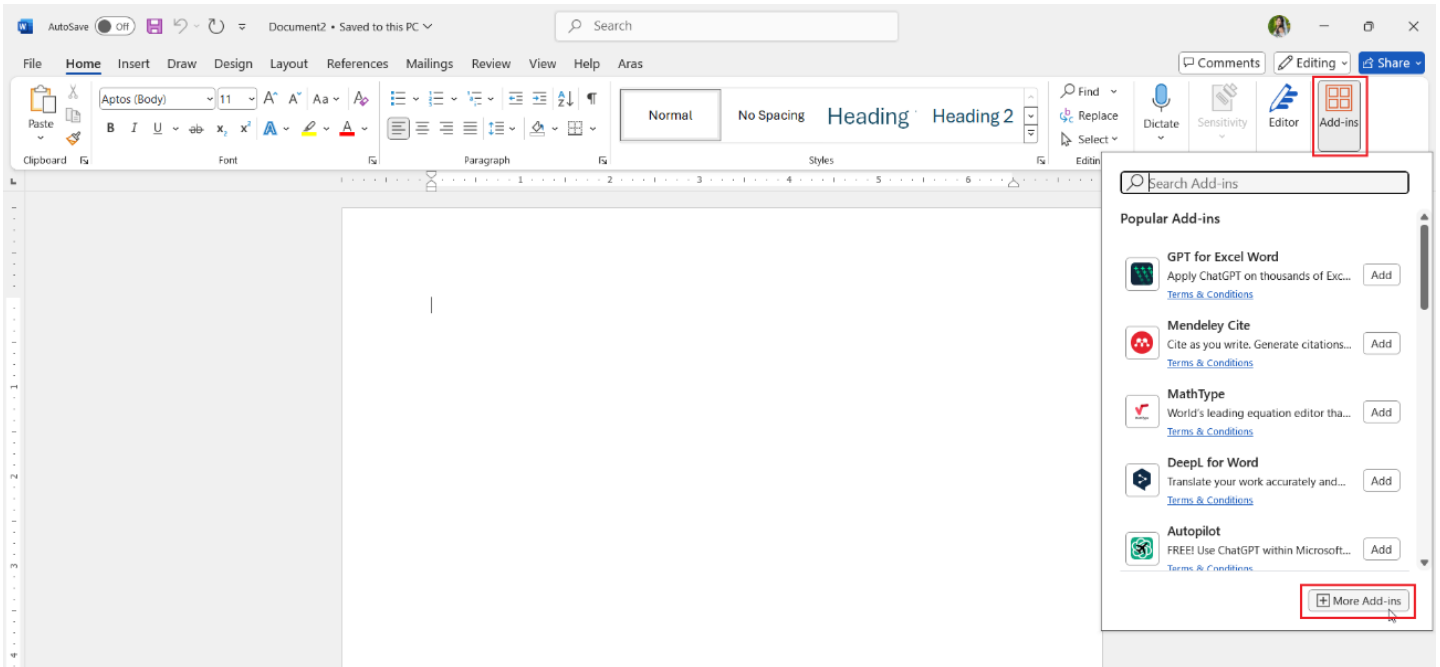
| Trusted Catalog Address | Catalog Type | Show in Menu |
|-------------------------|--------------|--------------|
|                         |              |              |

Remove
Clear

OK
Cancel

7. Click **Add catalog**.
8. Select the folder to which the `ArasOfficeProductivityConnector_Copy.xml` was copied.
9. Select **Show in Menu**.
10. Click **OK**.
11. Navigate to **Add-ins** and select **More Add-ins**.





12. Click **Shared Folder**.
13. Click **Refresh**.
14. Select the **Office Productivity Connector Add-in** and click **Add**.



## Installing Aras Office Productivity Connector 22 SharePoint Integration (Optional)

### Publish SharePoint Integration

1. From the Aras Innovator **TOC**, expand **Productivity Suite** and **Integration Framework**, and select **Integrations**.
  1. Open **SharePointIntegration**.
  2. Update details as per the **SharePoint** Configuration.
  3. Publish this Integration Item using **Promote** button.



## Post Installation

It is recommended to review the *Aras Office Productivity Connector 22 – Administration Guide* document after the installation is complete. To use all features, additional changes to the **Document Form** and **Document Class Structure** may be required.

For end-users, the *Aras Office Productivity Connector 22 – User Guide* is available from the **Documentation** folder of the Aras Office Productivity Connector 22 CD Image. Additionally, the online help can be referenced from directly at <https://www.aras.com/help/office/14-0-4> .



# Release Notes



Platform Support Matrix

For the software required for the Aras Office Productivity Connector 22:

| Aras Innovator Release | Client Operating System                                                                               | Browser                                                                                                                     |
|------------------------|-------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| 22-26                  | <ul style="list-style-type: none"><li>• Windows: 8.1, 10, 11</li><li>• macOS 10.15 Catalina</li></ul> | <ul style="list-style-type: none"><li>• Chrome 108 (minimum)</li><li>• Edge</li><li>• Firefox: 91 ESR and 102 ESR</li></ul> |



## Key Features and Known Issues

### Key Features in Aras Office Productivity Connector 22

The following key features are available in this initial release of the Aras Office Productivity Connector application:

#### **Support for Aras Innovator Release 22 through Aras Innovator Release 26**

**This Aras Office Productivity release introduces support for Aras Innovator Releases 22 through 26.**



## Known Issues in Aras Office Productivity Connector 22

### Fixed Issues in Aras Office Productivity 22

| Issue # | Description |
|---------|-------------|
|---------|-------------|

|     |     |
|-----|-----|
| N/A | N/A |
|-----|-----|

## Known Issues in Aras Office Productivity Connector 22

| Issue # | Description | Workaround |
|---------|-------------|------------|
|---------|-------------|------------|

|          |                                                    |  |
|----------|----------------------------------------------------|--|
| I-071080 | Custom properties are not supported in PowerPoint. |  |
|----------|----------------------------------------------------|--|

|          |                                                                           |  |
|----------|---------------------------------------------------------------------------|--|
| I-071081 | Custom properties are not refreshed in Microsoft Word online application. |  |
|----------|---------------------------------------------------------------------------|--|

|          |                                                                                                          |  |
|----------|----------------------------------------------------------------------------------------------------------|--|
| I-071082 | Browsers do not support closing tabs from the task pane, so the Save and Close operation is unavailable. |  |
|----------|----------------------------------------------------------------------------------------------------------|--|

|          |                                                                                                                                                                                                       |  |
|----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| I-071083 | Displaying a non-default document name inside the Office online application is impossible. When saving the file to Aras, the connector automatically handles the file name based on the user's input. |  |
|----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|



# User Guide



## Overview

Microsoft Office applications are a big part of most manufacturing companies' product development process. For example, Microsoft Word is used to create product specifications, Microsoft Excel for product-related financial spreadsheets, and Microsoft PowerPoint for product briefings.

Aras Office Productivity Connector provides a convenient way to manage Microsoft Office documents in Aras directly from the user interface of Office Online and desktop applications. The Connector helps standardize company documentation procedures by providing easy access to document templates, controlling numbering, and naming of files, and automating creation of viewable files like PDF.



## Use Case Overview

Aras Office Productivity Connector supports a set of common use cases for creating and saving Office documents using Aras Innovator. This section illustrates the typical flow of those use cases. The symbols used in the diagrams are shown here.

### Important

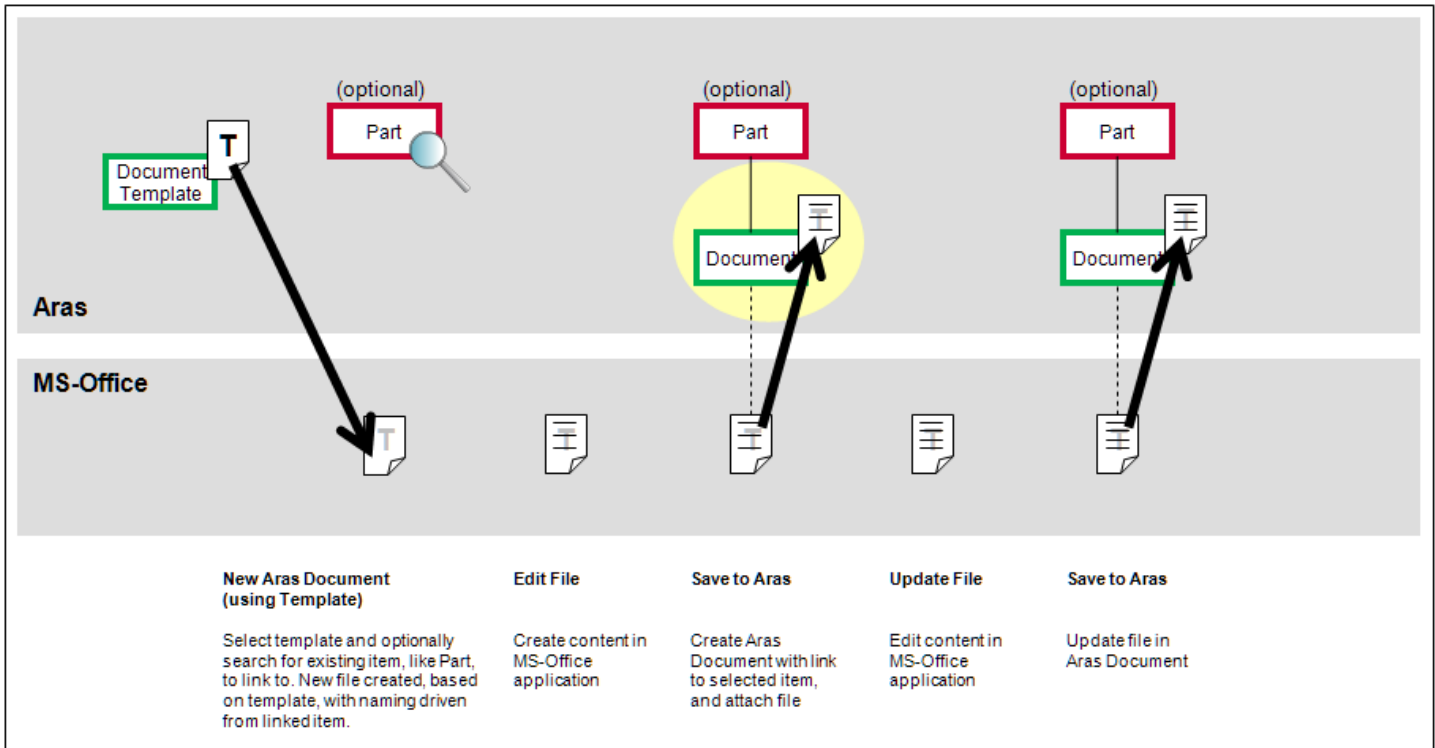
The “Aras Document” represents any type of item that is used to manage Office files in Aras Innovator.

## Create a New Document using a Template

This use case allows the use of a template file stored in Aras as the basis for a new document. The following capabilities are supported by this use case:

- Word, Excel, and PowerPoint
- A template file provides a starting point for document creation.
- A **File Name** and Aras **Document Number** are automatically generated based on a company’s process.
- Optionally, an existing Aras Item, such as a **Part** or **Project**, can be selected to link to. If selected, this linked item can also help drive the **File Name** and **Document Number**.

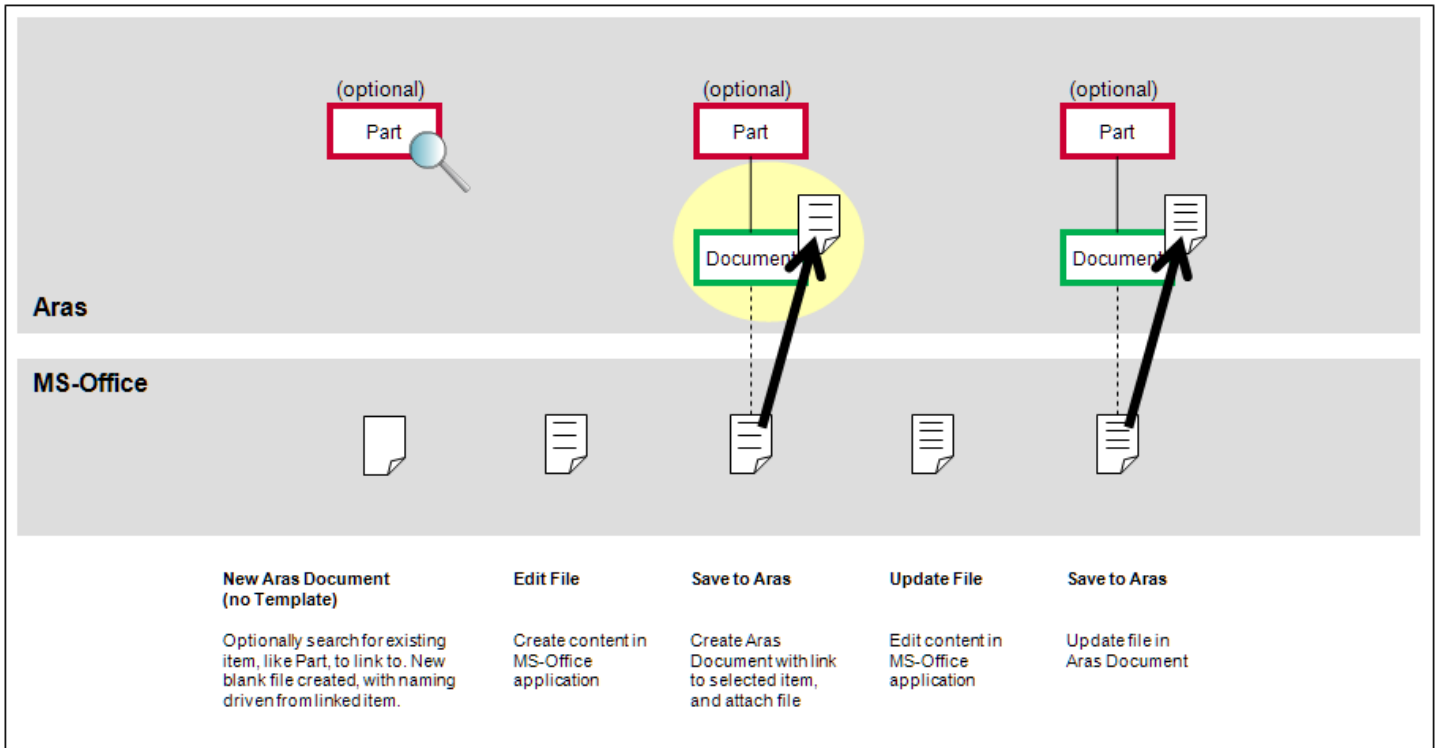




## Create a New Document with no Template

This use case is like the one described in the previous section, except that no template is used, so there is no content in the initial file. This use case supports the following capabilities:

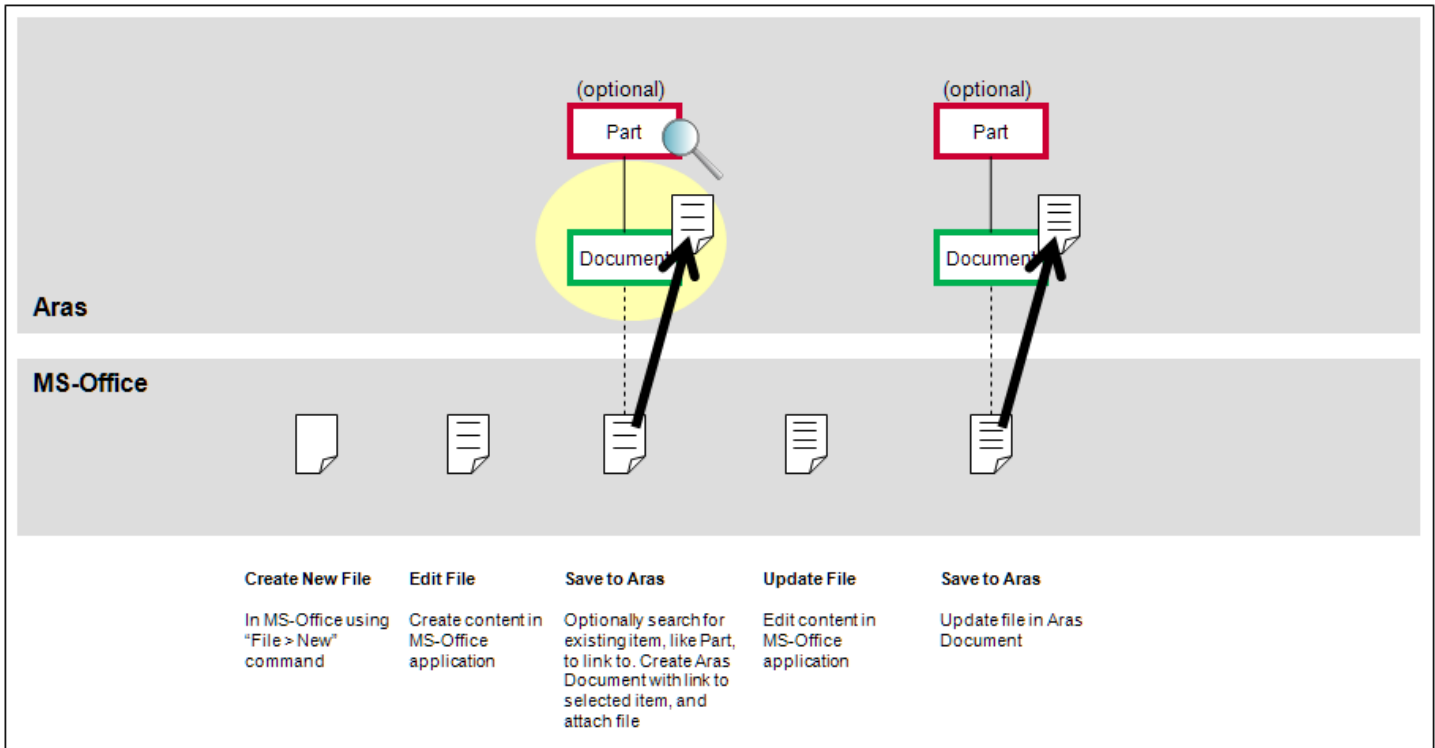
- Word, Excel, and PowerPoint
- **File Name** and Aras **Document Number** are automatically generated based on a company's process.
- Optionally, an existing Aras Item, such as a Part or Project, can be selected to link to. This linked item can also help drive the **File Name** and **Document Number** if selected.



## Save an Existing Office File

This use case is different from the previous two since here the file has already been created locally before being saved to Aras. It is not possible to use a template because the file already exists. The following capabilities are supported by this use case:

- Word, Excel, and PowerPoint
- An Aras **Document Number** is automatically generated based on a company's process.
- The file may be renamed based on a company's process.
- Optionally, an existing Aras item, such as a Part or Project, may be selected to link to. This linked item can also help drive the **File Name** and **Document Number** if selected.



## Collaborate on SharePoint Files

This use case allows you to manage documents within Aras and collaborate on updates inside SharePoint. This use case supports the following capabilities:

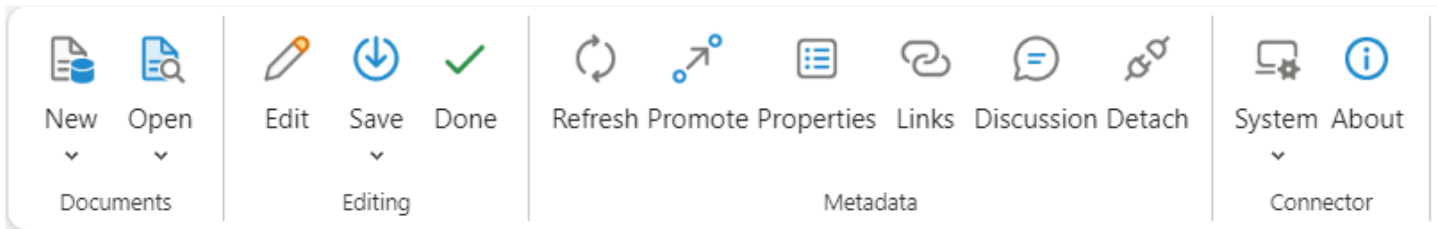
- Word, Excel, and PowerPoint
- An Aras file can be attached to a specific file in SharePoint.
- Collaboration on the document is done inside the SharePoint library, where users can make updates.
- A PDF of the SharePoint file is created in Aras.

## Aras Office Productivity Connector Basic Operation

This section overviews the available Connector commands and other basic information.

### Aras Ribbon and Commands

When the Aras Office Productivity Connector is installed on a local computer or as a Microsoft Office Online add-in, it adds an Aras ribbon within the Word, Excel, and PowerPoint applications:

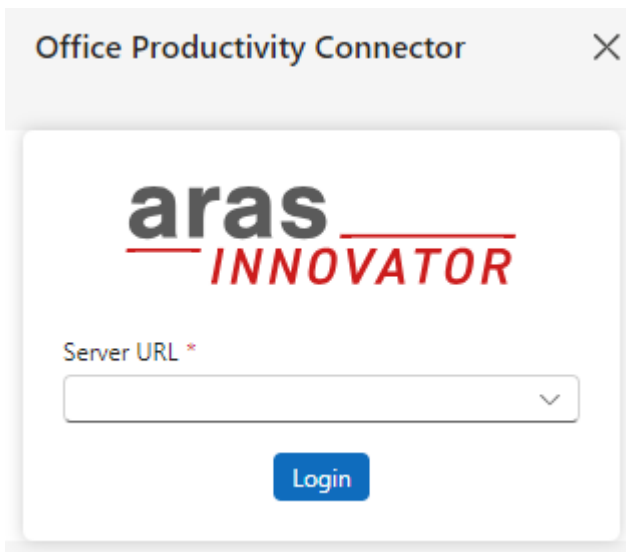


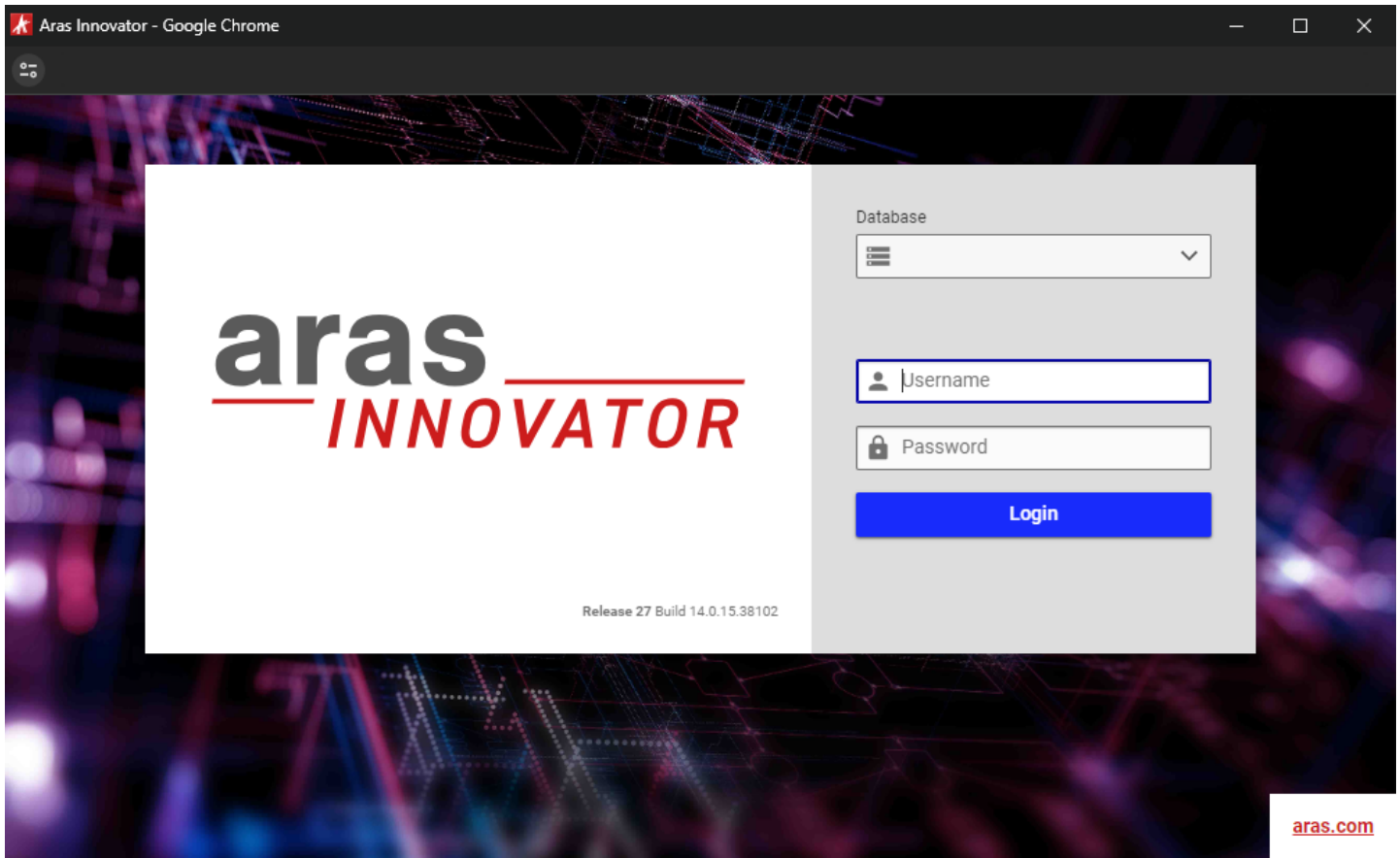
| Section   | Command or Field Name | Icon Description                                                                                                                         |
|-----------|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| Documents | New Aras Document     | Creates a new Office file managed by Aras, optionally using a template stored in Aras.                                                   |
| Documents | Save As               | Saves the current Office file as a new Office file managed by Aras.                                                                      |
| Documents | Open Aras Document    | Opens an Office file managed by Aras in the Office application by searching directly for a document.                                     |
| Documents | Open from Linked Item | Opens an Office file managed by Aras in the Office application by searching for the linked Item, such as <b>Part</b> or <b>Project</b> . |
| Documents | Version History       | Allows opening an earlier saved version of the file. Comparing versions is possible in MS Word.                                          |
| Editing   | Edit                  | Sets the edit claim on the current Office file.                                                                                          |
| Editing   | Save                  | Saves the current Office file in Aras and retains the edit claim.                                                                        |
| Editing   | Save and Generate PDF | Enables selecting whether a viewable will be created during the save process (Optional).                                                 |
| Editing   | Done                  | Saves the current Office file in Aras and removes the edit claim on the current Office file.                                             |
| Metadata  | Refresh               | Refreshes all ribbon information from Aras.                                                                                              |
| Metadata  | Promote               | Promotes the current Aras Document to a new lifecycle state (optional).                                                                  |
| Metadata  | Properties            | Displays a list of all file synchronized properties.                                                                                     |

|          |                  |                                                                         |
|----------|------------------|-------------------------------------------------------------------------|
| Metadata | Links            | Opens a dialog enabling adding or removing links to other Aras Items.   |
| Metadata | Discussion       | Accesses the Discussion Panel, where comments can be added and sent.    |
| Metadata | Detach           | Removes the Aras tracking information from the current Office file.     |
| Metadata | Settings         | Accesses the Settings task pane to manage user settings for logging in. |
| Metadata | Refresh Settings | Refreshes new settings and properties from Aras.                        |
| Metadata | Session          | Displays session information and allows logging out of Aras.            |
| Metadata | About            | Displays information about the Aras Office Connector.                   |

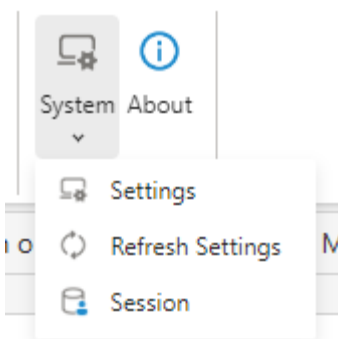
## Logging in to Aras

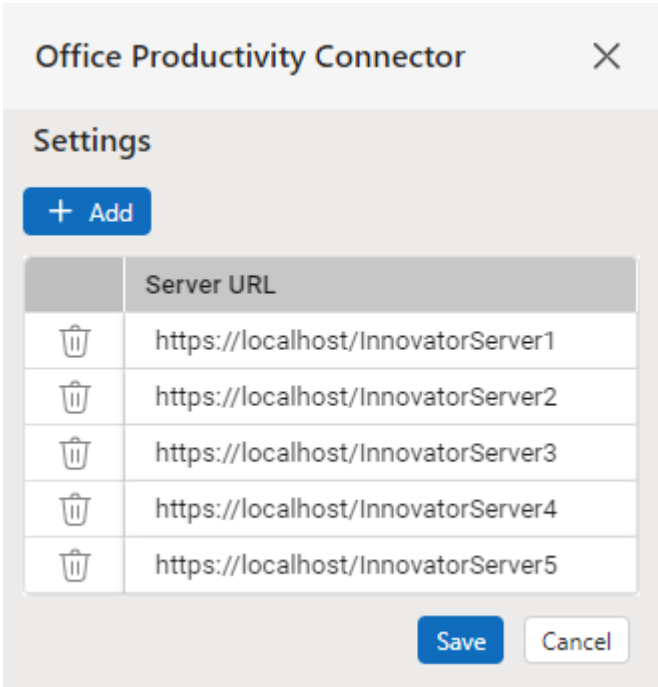
Users must log into Aras Innovator with their username and password to use the Aras Office Productivity Connector. After starting any Office application and selecting a command from the Aras ribbon, users will be automatically prompted to log in with the following dialogs:





The URL for connecting to Aras Innovator can be entered manually or stored as a dropdown selection. The URL connections for the dropdown selection are stored in **Settings** under the **System** button in the Aras Ribbon:



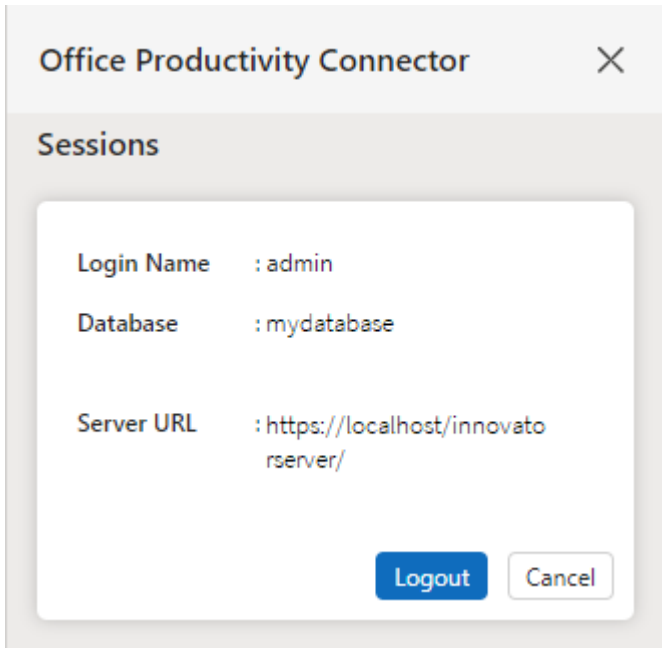


The screenshot shows a dialog box titled "Office Productivity Connector" with a close button (X) in the top right corner. Below the title bar is a "Settings" section. Inside this section, there is a blue button with a plus sign and the text "+ Add". Below this button is a table with a header row labeled "Server URL". The table contains five rows, each with a trash icon in the first column and a URL in the second column. The URLs are all "https://localhost/InnovatorServer" followed by a number from 1 to 5. At the bottom right of the dialog box, there are two buttons: "Save" (blue) and "Cancel" (white with a grey border).

|                                                                                   | Server URL                         |
|-----------------------------------------------------------------------------------|------------------------------------|
|  | https://localhost/InnovatorServer1 |
|  | https://localhost/InnovatorServer2 |
|  | https://localhost/InnovatorServer3 |
|  | https://localhost/InnovatorServer4 |
|  | https://localhost/InnovatorServer5 |

The Connector functions can be used once the appropriate values are entered and Login is clicked. A separate login to Aras is required for each Office application. The Aras login will remain active if the Office application is active.

Users can log out of Aras by clicking the down arrow in the **System** section and selecting **Session** and **Log out**:



#### Important

The ability to access data in Aras through the Aras Office Productivity Connector depends on user permissions.

## File Management

Files managed by the Aras Office Productivity Connector are kept in the default working folder. The default location is the **Documents** folder.

The Aras Office Productivity Connector does not affect the ability to use the normal Office **Save** and **Open** commands. Even when managing files in Aras, files can still be saved and opened locally.

## Aras Item Types used by the Aras Office Productivity Connector

Aras Innovator manages data using several different Item Types. Items can be things like **Parts**, **Projects**, **Process Plans**, etc. The type of Item Aras uses to manage files is generally referred to as a **Document** but could have a different name in an environment. An Aras **Document** should be considered a container that can hold one or more files and has properties (metadata) describing the content of the files. Aras **Documents** can be linked to other Item Types like **Parts** and **Projects**.



using Relationships so that when someone looks at a **Part** for example, they can easily navigate to the related **Document** to find and view the files.

While Aras **Documents** can contain an arbitrary number of files, when you use the Office Productivity Connector, you will have only one or two files per **Document**. One file will be the native Office file (such as `.docx` or `.pptx` ), and the other will be an optional viewable file (such as `.pdf` ).

## Creating and Saving Documents

As shown in the *Use Case Overview* section, there are several different ways to use the Aras Office Productivity Connector to create and save documents. This section describes the procedures associated with these different use cases.

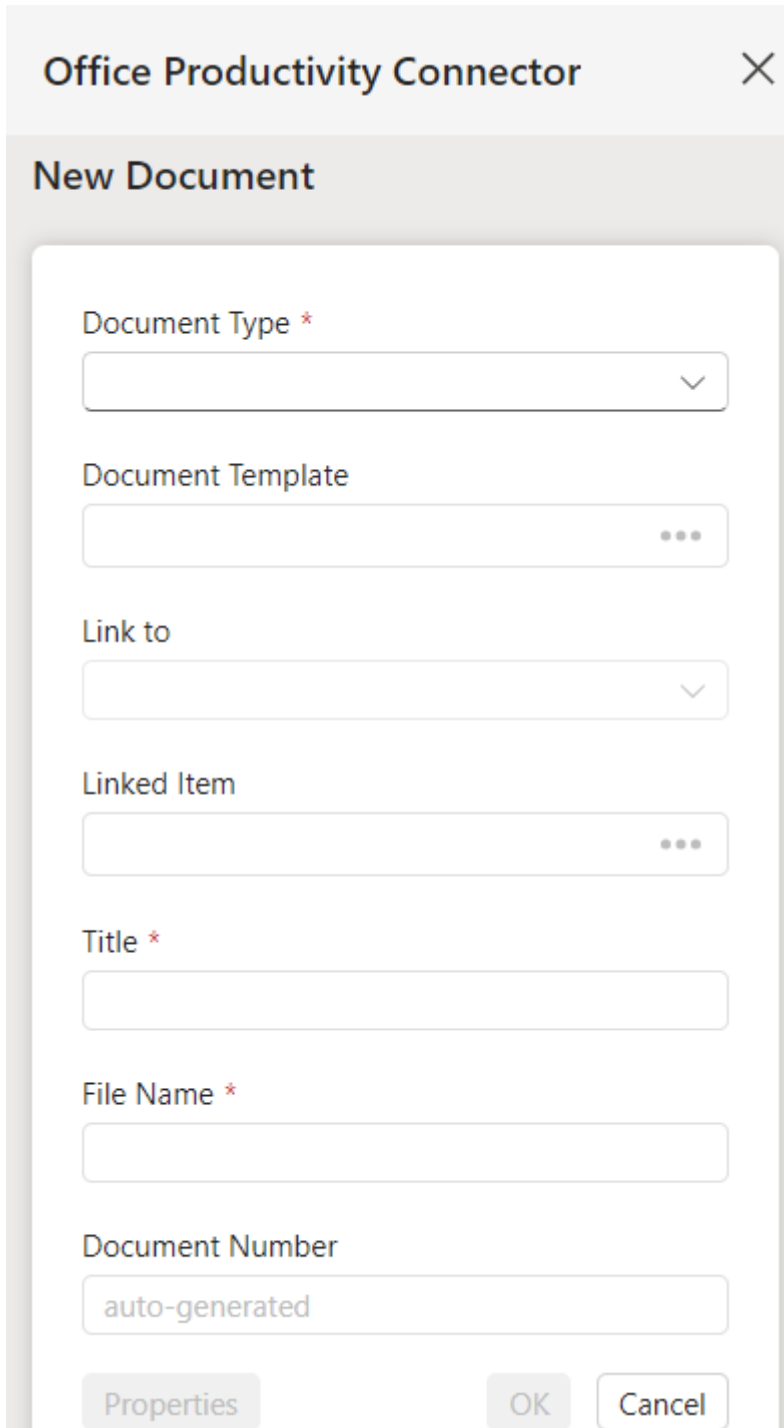
### Creating a New Aras Document

Creating a new Aras **Document** allows the creation of a new Office file while using company-standard processes such as templates and numbering.

To create a new Aras **Document**:

1. Click the **New** button in the Aras ribbon and select **New Aras Document**. This opens the **New Document** task pane.





The screenshot shows a dialog box titled "Office Productivity Connector" with a close button (X) in the top right corner. Below the title bar is a section header "New Document". The main content area contains several form fields:

- Document Type \***: A dropdown menu with a downward arrow icon.
- Document Template**: A text input field with three dots (ellipsis) on the right.
- Link to**: A dropdown menu with a downward arrow icon.
- Linked Item**: A text input field with three dots (ellipsis) on the right.
- Title \***: A text input field.
- File Name \***: A text input field.
- Document Number**: A text input field containing the text "auto-generated".

At the bottom of the dialog, there are three buttons: "Properties" (disabled), "OK", and "Cancel".

2. Select the appropriate Document Type by clicking the down arrow in the **Document Type** field. The selected Document Type drives the behavior of all the other options. An administrator sets the Document Types available. Standard examples are provided with the connector, such as



**Document / Product**, **Document / Project**, and **Document / General**. For example, a **Document / Product** Document describes a product you are designing for a company, while a **Document / Project** Document describes an aspect of the project being worked on. The following is an example of the selection list for **Document Type**:

Document Type \*

▼

Document / Ad-hoc  
Document / General  
Document / Product  
Document / Project

Link to

3. Click the **ellipsis (...)** button in the **Document Template** field to browse for a template to apply to the document. The following is an example of the search dialog:

Search Document ▼

🔍 Search

🗑 Clear

| Claim | Document Number | Revision | Name | Type   | State | Authoring Tool   | Changes                  | Files                               | Template                            | From Template |
|-------|-----------------|----------|------|--------|-------|------------------|--------------------------|-------------------------------------|-------------------------------------|---------------|
| ▼     |                 |          |      | Ad-hoc |       | Microsoft Word ▼ | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |               |

No Items Found

Select

Cancel

The entries in the list show the available templates in Aras that correspond to the selected Document Type. Additional search filtering can be performed by entering values in the search bar.

Templates need to be defined prior to using **New Aras Document** and may be defined by the administrator or by other users. For details on creating templates, refer to the *Creating Document Templates* section.

**Important**

The administrator can define specific Document Types that require a template. If this is the case, the dialog cannot be exited from without selecting a template.



- **Link to**

Based on the **Document Type** selection, the selection list for **Link to** shows the available Aras **ItemTypes** that can be linked to a document. For example, a user can link a Product Document to only **Parts**, and a Project Document to **Projects** and **Activities**.

In Aras terminology, links are also known as **Relationships**. The advantage of creating them at the time of document creation is that the item linked to can drive numbering.

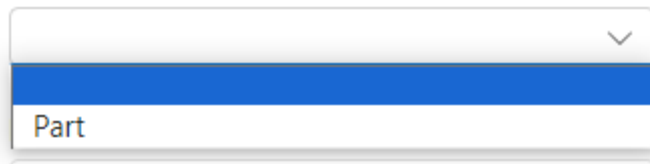
For example, if a Product Document is created and linked to **Part P12345**, the File Name could be automatically set to something like **P12345-DOC-1.docx**.

#### Important

An administrator can set **Link to** as required for a given Document Type, meaning a linked Item must be selected before proceeding.

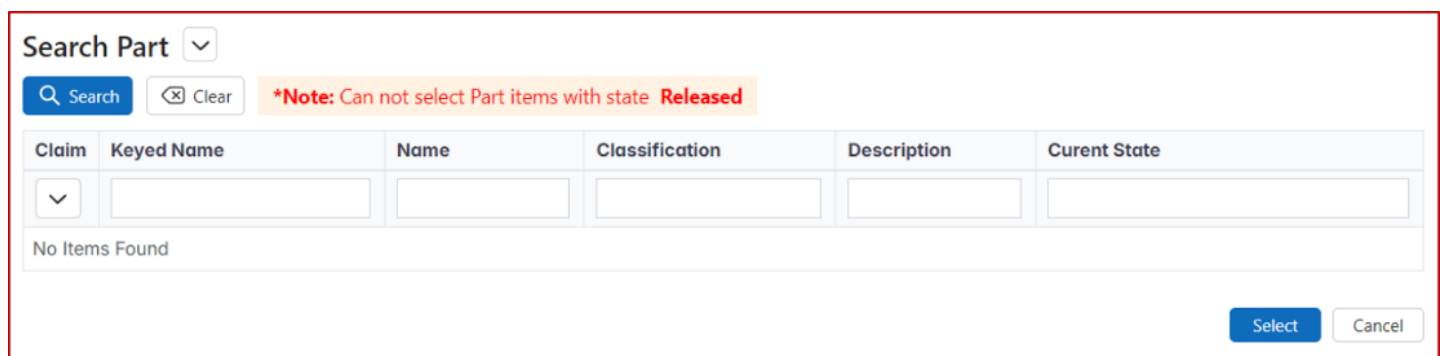
An example of the selection list for **Link to** is shown here:

Link to



A dropdown menu with a white background and a blue border. The text 'Link to' is above the menu. The menu is open, showing a blue bar with the word 'Part' in white text.

Once the Item Type to link to is selected, click the **ellipsis (...)** button to open a search dialog to select the specific item in Aras:



A search dialog box with a red border. At the top, it says 'Search Part' with a dropdown arrow. Below this are two buttons: 'Search' (blue) and 'Clear' (white with a red 'X'). To the right of these buttons is a red note: '\*Note: Can not select Part items with state Released'. Below the buttons is a table with the following columns: Claim, Keyed Name, Name, Classification, Description, and Curent State. Each column has a corresponding input field. Below the table, it says 'No Items Found'. At the bottom right, there are two buttons: 'Select' (blue) and 'Cancel' (white).

| Claim | Keyed Name | Name | Classification | Description | Curent State |
|-------|------------|------|----------------|-------------|--------------|
| ▼     |            |      |                |             |              |

No Items Found

Select Cancel

Capabilities within this Search dialog include: Entering search criteria in the top search row. Executing a search with the **Search** button. Clearing search criteria with the **Clear** button.

Once the desired Item is located, select it and click **Select**. It will appear in the main dialog as the **Link to** Item.

After making selections in the left column of the dialog, the **New Document** task pane appears as shown here:



Office Productivity Connector

×

New Document

Document Type \*

Document / Ad-hoc

▼

Document Template

100001

...

Link to

Part

▼

Linked Item

1000123

...

Title \*

XRZ Bicycle Specification Template

File Name \*

XRZ Bicycle Specification Template

Document Number

auto-generated

Properties

OK

Cancel

- Title and Other Properties



4. Enter a title for the document and, optionally, any other Properties configured in the environment.

**Important**

Office and Aras use different nomenclature for standard property names, so the value you enter for **Title** may appear as the **Name** in Aras.

The values displayed when selecting **Properties** reflect the Office naming.



Office Productivity Connector

×

New Document

Document Type \*

Document / Ad-hoc

▼

Document Template

...

Link to

Part

▼

Linked Item

1000123

...

Title \*

XRZ Bicycle Specification Template

File Name \*

XRZ Bicycle Specification Template

Document Number

auto-generated

Properties

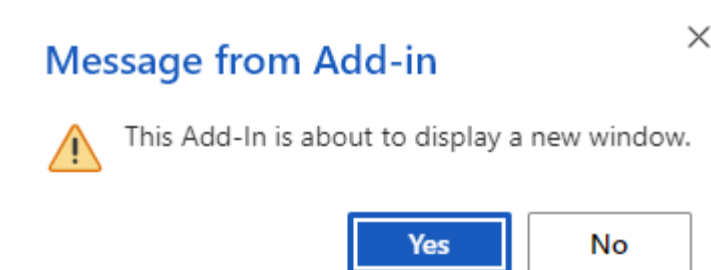
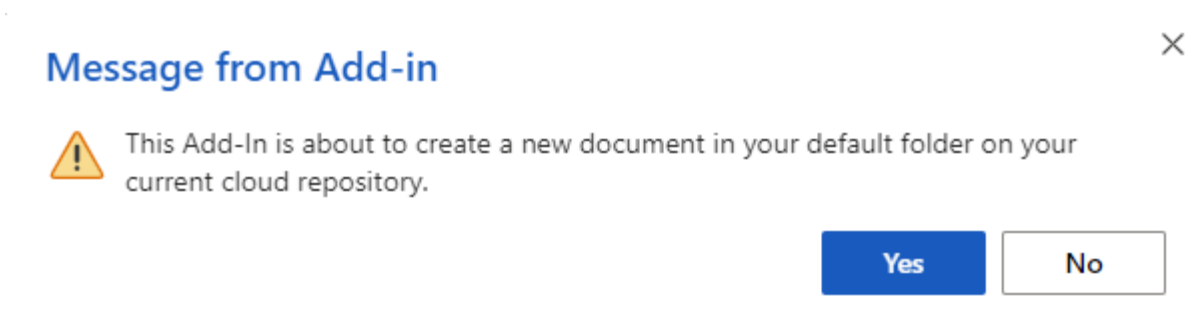
| Property | Value |
|----------|-------|
| Subject  |       |





An administrator may define properties in Aras as “required”. Creating a new document cannot continue until all required properties are entered. An administrator can also pre-define default values for properties in Aras.

5. Click **OK** to complete the process. The connector automatically creates a new open file within the Office application and saves it to the work folder. The Office application will notify that a new document will be created and displayed in a new window.



#### Important

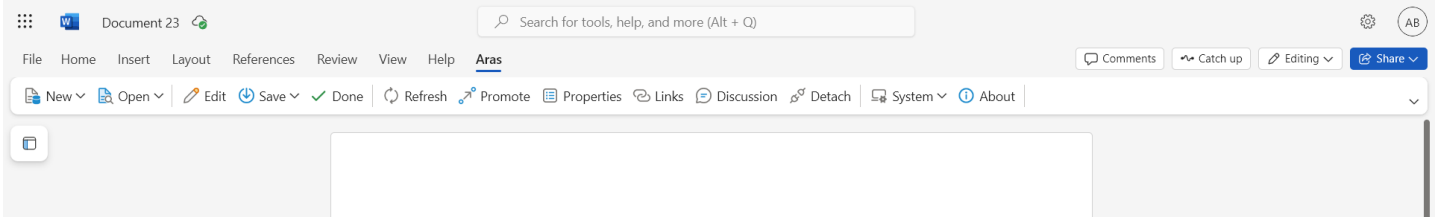
The File Name displayed by the Office application is determined by the Office application. When saving the file to Aras, the Connector will automatically determine the File Name.

If using a template, the file's initial content comes from the template file; otherwise, it will be blank.

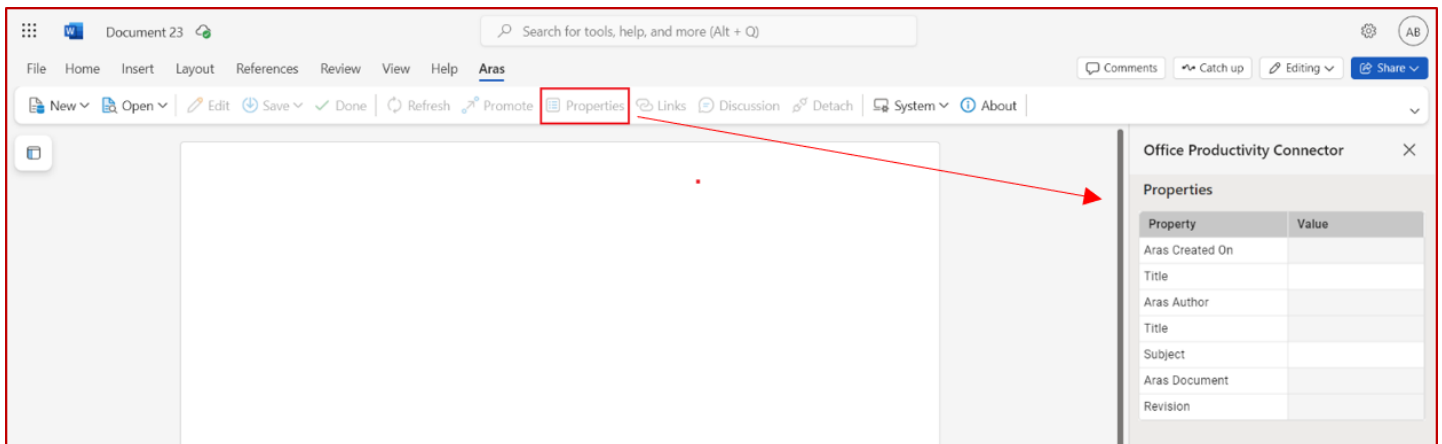
#### Important

The Aras Office Productivity Connector populates a property on the Document based on the Microsoft Application that authored the file. By default, this is the **Authoring Tool** property. An administrator may configure the Aras Office Productivity Connector to use a different property for this value. For the purposes of the *Aras Office Productivity Connector 22 – User Guide*, the default name for the **Authoring Tool** property will be assumed.

The following figure shows an example of an Office application at this step. The file has been created and saved in the working folder.

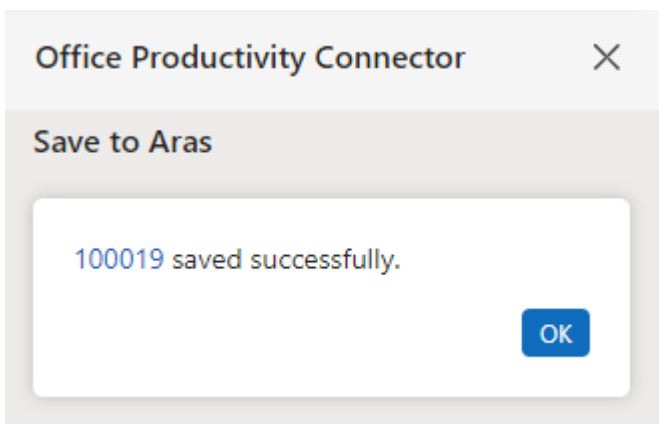
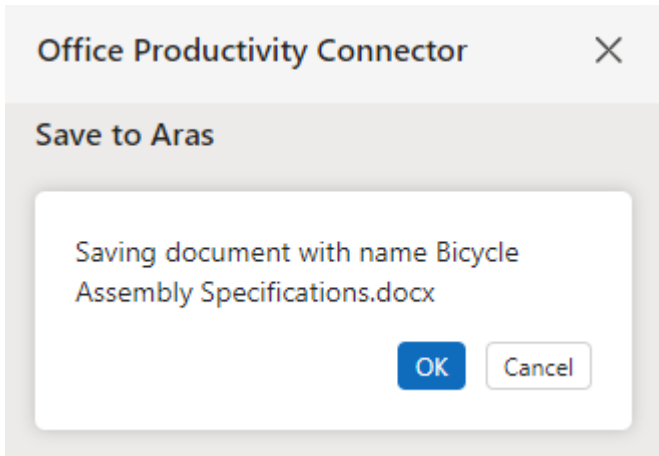


Since the file has not yet been stored to Aras, values are not displayed when viewing the Aras Document properties. If you have these properties imbedded in your document, they will not be updated yet.



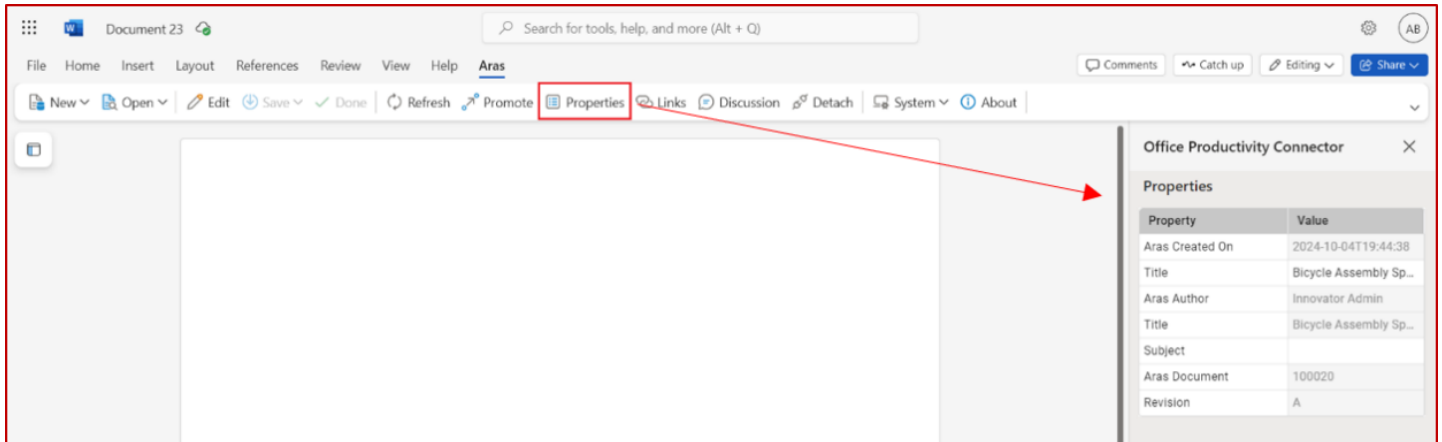
At this point, edits can be made to the file.

- To save the file into Aras, click the **Save** button and select **Save**. The task pane will appear to confirm the file to be saved. Click **OK**. The task pane will then confirm the document is saved successfully.

**Important**

The File Name displayed by the Office application is determined by the Office application. When saving the file to Aras, the File Name will be automatically determined by the Connector.

The properties are updated because the file is saved into Aras.



If the Document is in Aras Innovator, the Form below is displayed:

100020 ☆

Edit ↻ ↺ ⚙️ 🗑️ 🔗 ⋮ Open in Office

Document

|                                                                                                                                     |                                  |                      |                  |
|-------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|----------------------|------------------|
| Document Number<br>100020                                                                                                           | Revision<br>A                    | State<br>Preliminary | Assigned Creator |
| Name<br>Bicycle Assembly Specifications                                                                                             |                                  |                      | Designated User  |
| Type<br>Ad-hoc                                                                                                                      | Authoring Tool<br>Microsoft Word | Version              | Effective Date   |
| Description                                                                                                                         |                                  |                      | From Template    |
| <input checked="" type="checkbox"/> Files Attached<br><input type="checkbox"/> Changes Pending<br><input type="checkbox"/> Template |                                  |                      |                  |

Files Changes

Files ☆

⚙️ 🔍 🔍 Hidden ⚙️ 🖨️ 🔗

| Related File [...]                                   | File Type [...] | Comments | Sequence ↑ | Is Shared                           |
|------------------------------------------------------|-----------------|----------|------------|-------------------------------------|
| <a href="#">Bicycle Assembly Specifications.docx</a> | Microsoft Word  |          | 128        | <input checked="" type="checkbox"/> |

< Prev Next > Page: 1 of 1 | 1 Results | 📄

## Manual File Naming Option

A File Name can be manually entered for the new file depending on the **Document Type** selected. An administrator sets this option. Typically, this will be for document types like **Ad Hoc** that don't



need to be highly controlled. The **File Name** field will appear in the dialog when this option is enabled. After clicking **OK**, the file is created with the File Name entered.

### Filtering by Link To Selection

If there are many Document Types in the Aras environment, one way to quickly find the desired type is to select the **Link to** the item type. This automatically filters the Document Type list to those valid for the selected Item Type.

### Attaching an Office File to an Existing Aras Innovator Document

#### Important

Before this feature can be used, the administrator must enable the **Allow Select Existing Document** checkbox on the appropriate Office Document Type.

To attach a file to an existing Aras Innovator **Document**, first create a New Aras **Document**, as described in the *Creating a New Aras Document* [section](#) . Before selecting **OK**, use the following steps:

1. Click the **ellipsis (...)** button in the **Document Number** field. The Search dialog box appears.

| Claim | Document Number | Revision | Name | Type   | State | Authoring Tool   | Change                   |
|-------|-----------------|----------|------|--------|-------|------------------|--------------------------|
| ▼     |                 |          |      | Ad-hoc |       | Microsoft Word ▼ | <input type="checkbox"/> |

No Items Found

Select Cancel

1. Click the **Search** button to see a list of existing documents without an attached file.



Search Document

Search

Clear

\*Note: Can not select Document items with state Released

| Claim        | Document Number | Revision | Name                        | Type   | State       | Authoring Tool | Change      |
|--------------|-----------------|----------|-----------------------------|--------|-------------|----------------|-------------|
| <div>▼</div> |                 |          |                             | Ad-hoc |             | Microsoft Word | <div></div> |
|              | 100029          | A        | Bicycle Wheel Specification | Ad-hoc | Preliminary | Microsoft Word | <div></div> |
|              | DOC-123         | A        | Specification               | Ad-hoc | Preliminary | Microsoft Word | <div></div> |

Select

Cancel

2. Select the existing document and click **OK**. The Document Number is applied to the new document.



Office Productivity Connector

×

New Document

Document Type \*

Document / Ad-hoc

▼

Document Template

...

Link to

▼

Linked Item

...

Title \*

Specification

File Name \*

Document Number

DOC-123

...

×

Properties

OK

Cancel

## Saving an Existing Document to Aras



An existing Office file can still be saved to Aras, but the options will be slightly different from those for creating it in Aras. To save an existing file to Aras, simply open it in the Office application, click the **Save** button, and click **Save**. After saving to Aras, the Aras ribbon is updated. Behaviors compared to creating a new document are:

- **Document Type:** Document Types that do not require a template will be shown since a template cannot be used for an existing file.
- **Document Template:** Not selectable since the file already exists.
- **Link to:** Any Item to link to can be selected based on valid Item Types for the selected Document Type.
- **Title and Properties:** All capabilities are the same.
- **File Naming:** The File Name field will not appear regardless of Document Type. If the Document Type does not automatically rename the file, it will use the existing File Name.

## Update Save

As described in the previous sections, the behavior of the **Save** command changes depending on the state of the current file. If a new file was just created using **New Aras Document**, the **Save** command creates the Aras **Document** and attaches the file to it. If saving an existing file, the **Save** command opens the task pane to enable defining the various options. The Aras Document can be created, and the file can be attached. Once either of these has been done to start working on an Office file managed in Aras, the **Save command can** update the file. This is referred to as an **Update Save**. Use it to ensure the latest file is available in Aras.

## Done

The Aras Office Connector includes a **Done** command indicating that work is complete on a particular file and control is given back to Aras.

## Save As

Use the **New, Save As** command to perform a **Save As** on a file already managed in Aras and have it become a new file also managed in Aras. This command is only available if the current Office file has already been saved to Aras. When using **Save As**, the same dialog appears as when saving a new file, but with different available options. Behaviors compared to creating a new document are:



- **Document Type:** The Document Type of the original document appears. If this original Document Type requires a template, it cannot be changed. If it does not require a template, it can be changed.
- **Document Template:** The Document Template, if any, is displayed but cannot be changed since the file already exists.
- **Link to:** Any item can be selected to link to based on the valid Item Types for the Document Type.
- **Title and Properties:** Properties from the original file will initially be displayed and can be edited if desired.
- **File Naming:** The File Name field will appear only if the Document Type does not automatically rename the file. In this case, a File Name can be entered for the new file. Otherwise, the renaming logic for the specific Document Type will be used.



## Opening Documents from Aras

Use the **Open** command on the Aras ribbon to retrieve Office files previously saved into Aras Documents for viewing or editing. This brings up a Search dialog for Documents.

### Search Dialog for Documents

Selecting the **Open** command brings up a search dialog for Documents:

Office Productivity Connector

×

Open Document

Document Type \*

Document / Ad-hoc

▼

Keyword

🔍

Mode \*

☒ View

☐ Edit

|                | Claim | Keyed Name | Revision | Name |
|----------------|-------|------------|----------|------|
| No Items Found |       |            |          |      |

**Important**

The columns displayed in the dialog are configurable by the administrator and so may appear different at your site.

### View and Edit Options

Once the desired Document has been located using the search dialog, it can be opened in either View or Edit Mode. For View Mode, select the row with the document and click the **View** button, or



double-click on the row. For Edit Mode, select the row with the document and click the **Edit** button. Characteristics of View Mode versus Edit Mode are as follows:

- View Mode

The Document opens as Unclaimed.

Used when there is no intention of modifying the file, only to read the file, copy content from it, or do a **Save As to Aras** with it.

This is the only possible mode if a user doesn't have rights to claim the Aras **Document**, for example, if the Document is released or claimed by someone else.

- Edit Mode

The Document opens as Claimed. No one else can make changes until it is unclaimed.

Used when intending to modify the contents of the file.

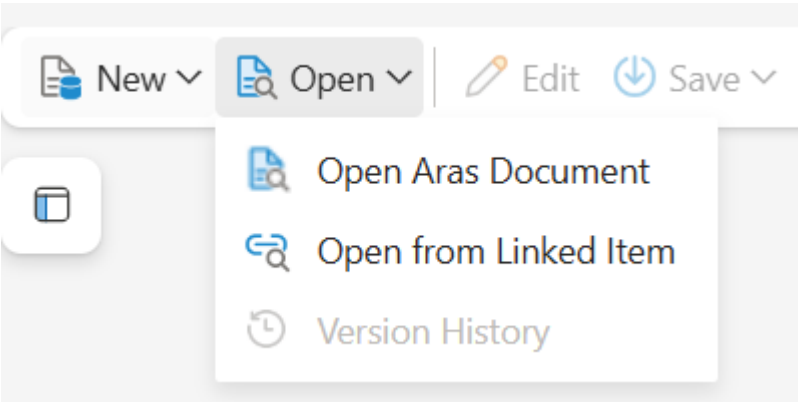
If attempting to open the file using Edit Mode and the system cannot claim the Document, the Connector will prompt if it is OK to open the file for view only.

It is possible to open the file for view only and later claim the Aras Document to allow editing. However, if someone has modified the Aras Document in the meantime, it cannot be claimed because the file will be outdated. See the next section for details.

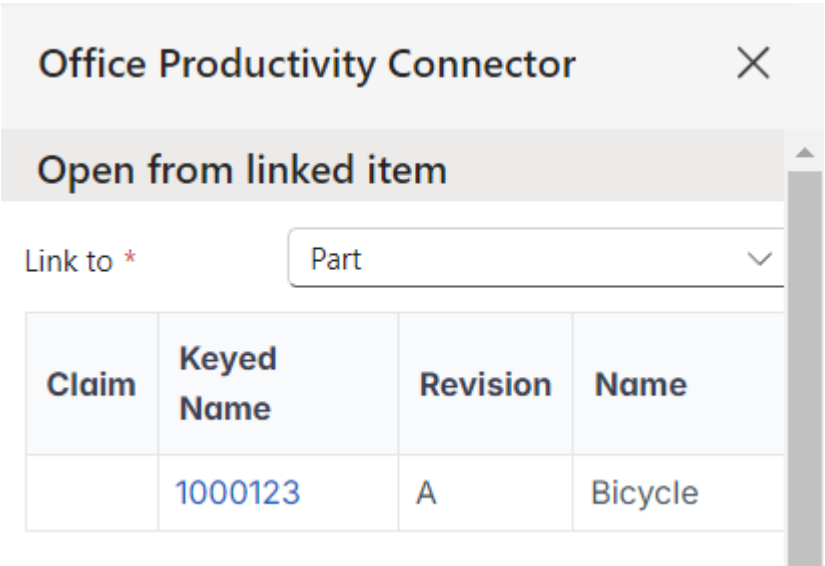
## Opening from a Linked Item

It may be easier to locate the Document by searching for an Item it is linked to rather than the Document itself. For example, suppose the Document pertains to a **Part** or a **Project** being worked on. The **Open from Linked Item** command provides an easy way to do this. This command is accessed by clicking on the arrow next to the **Open** command:





This opens the search task pane, where the desired type of linked item can be selected using the Item Type selector and then searched for. Select the desired Item and click on the **Keyed Name** to view it.



## Edit Control

The Aras Office Productivity Connector provides several features to support editing files in Office applications.

## Document Claiming and Unclaiming

In Aras terminology, when a user **Claims** an Item like a **Document**, the user can reserve it so that only that user can edit it. Only one person at a time can claim any given Item. When the user **Unclaims** the Item, it is available for others to claim and edit. The ability to claim Items is controlled by Aras's **Permissions**. For example, **Permissions** for most users are set so that when an Item is in the **Preliminary** (in-work) State, it can be claimed, but when it is in the **Released** State, it cannot be claimed and, therefore, cannot be edited.

The Aras Office Productivity Connector leverages the **Claim** and **Unclaim** functions to control who has the right to edit files. The **Claim Status** is indicated by the **Claimed by** field in the task pane. If this shows a name, then the Document is claimed, and if not, it is unclaimed. If it is showing a user's name, that user has edit rights.

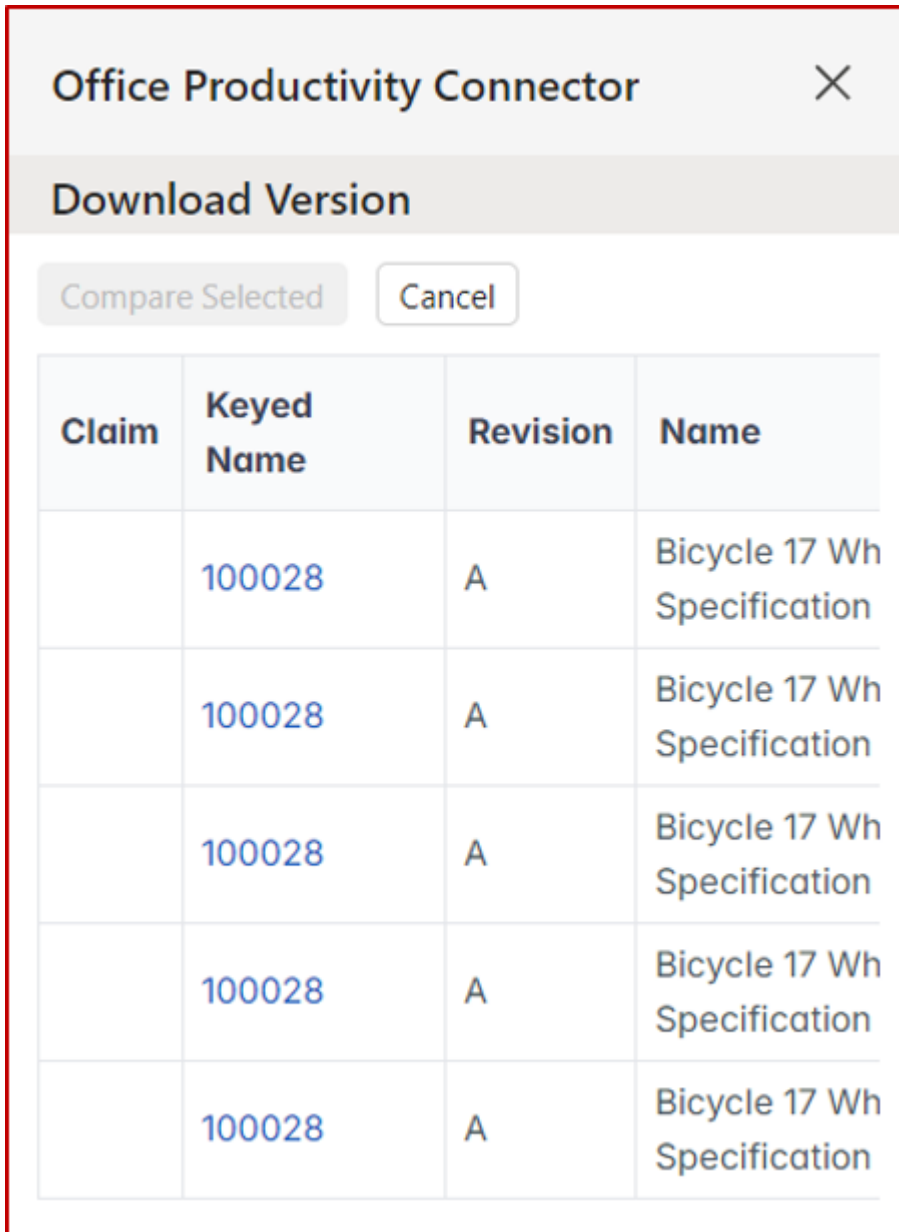
The Aras Office Productivity Connector automates much of the **Claim** and **Unclaim** behavior in intuitive ways when working on Office files.

Use **Done** when finished editing, and Aras will take care of proper **Claiming** and **Unclaiming**.

## Opening Old Versions

When a user clicks on **Open**, the user opens the latest version saved in Aras. However, since the old versions are still managed in Aras, it is possible to open the old versions as well. This is done by selecting **Open** and using the **Download Versions** Command after opening a file using **Open**. Clicking **Download Versions** will open the task pane showing all versions to select from:





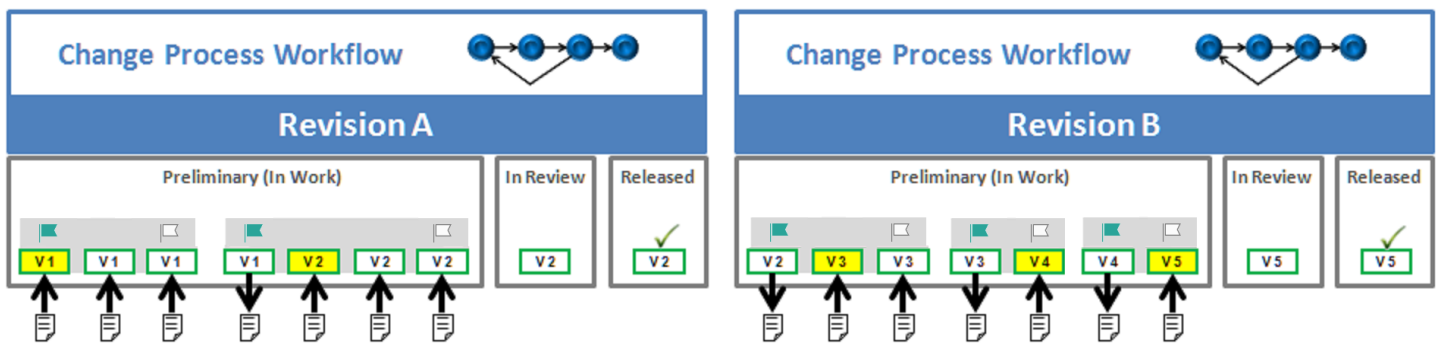
## Comparing Two Versions in MS Word

Within MS Word only, the **Download Versions** task pane enables easy comparison of two versions of the same file.

## Document Change Process

In addition to the ability to control versioning with the Aras Office Productivity Connector, Aras provides full enterprise change process capabilities for Documents. This process enables creating revisions of Documents, driven by an approval workflow where the Documents progress through a set of **Life Cycle** States. This process is typically driven by an Aras **Change Item** such as an **ECO** (Engineering Change Order) or **DCO** (Document Change Order). This is an extensive topic and can involve many site-specific customizations at a company. This document will only introduce the topic and explain how the Aras Office Productivity Connector interacts with the change process. For further details, please refer to Aras's general documentation.

The following diagram illustrates an example of a Document moving through two successive revisions: being created, updated, and released to **Revision A** and then modified again and released to **Revision B**. The grey boxes marked **Preliminary**, **In Review**, and **Released** indicate the document's **Life Cycle** States.



The highlights of the diagram are:

- The edit cycles described in the diagram in the next section, *Lifecycle State Promotion*, are also shown here. They take place during the **Preliminary Life Cycle** State.
- Permission to modify Documents is based on the **Life Cycle** State. In **Preliminary** State (which means **In Work**), permissions are set such that users responsible for creating Documents have edit rights. In states **In Review** and **Released**, these users will not have edit rights because the Document should not be changed while it is in review or released.
- Activities within the **Workflow** change the Document's **Life Cycle** State. For example, the Document moves from **Preliminary** to **In Review** when the responsible user announces the editing is complete.
- **Versions** (also known as **Generations** in the Aras web client) always increase by one on each edit cycle across all revisions. In the example above, **Version 2** is released as **Revision A**, and

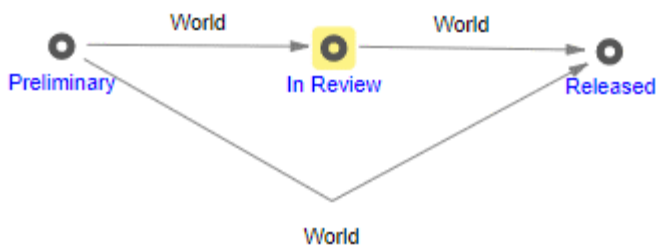


**Version 5** is released as **Revision B**.

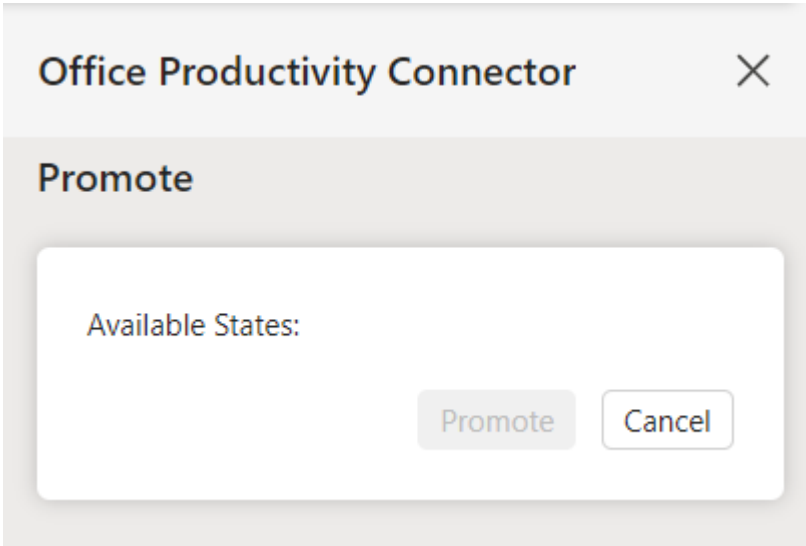
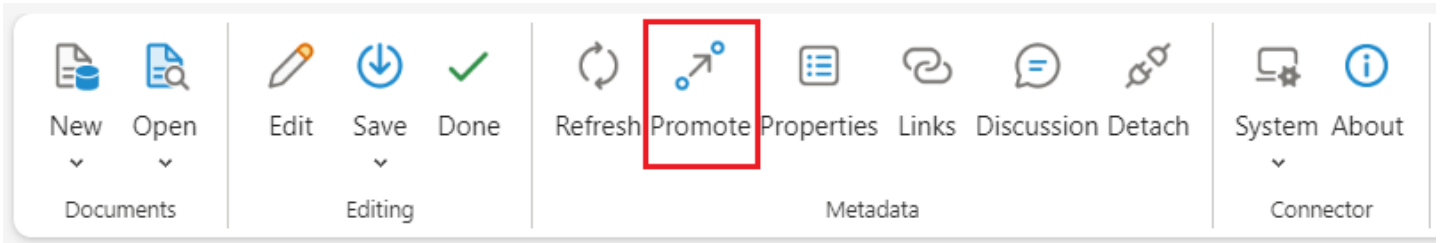
- Any number of new Versions can be created within one Revision. Only the last one will be released, but the others are kept in the system and can be retrieved later.
- The new “to be” Revision is assigned to the Document as soon as it moves to **Preliminary** State.
- During the **In Review** State, the responsible parties review the document contents. If they approve, the Document will be moved to the **Released** State. If they do not approve, the **Workflow** can loop back so that the **Document** goes back to the **Preliminary** State for further editing. This is not shown in the diagram.
- **Revision Sequences (A, B, C, etc.)**, **Life Cycle State Names**, and **Workflow Activities** are all configurable in Aras Innovator to fit company processes. The example shown is based on the software's out-of-the-box behavior.

## Lifecycle State Promotion

Another approach to managing the Document change process is to use manual **Lifecycle** State Promotion, in which case there is no **ECO** or **DCO** as described in the previous section. Still, users can simply promote from one state to another manually. For example, here is a simple Document **Lifecycle Map** showing three States that the Document can have:



If Documents are defined in this manner, then an administrator can set up the Aras Office Productivity Connector so that the Promote command can be accessed directly from the Office ribbon. By clicking on this command, the current Document can be promoted to a desired state. Note that the Document must be unclaimed to promote.



## Document Templates

Document Templates are an important part of the Office Productivity Connector, helping an organization create documents that follow a standard approach. Responsibility for creating templates can exist throughout the organization, including administrators, document control staff, and end users. This section explains how to create Document Templates in Aras Innovator for use by the Office Productivity Connector.

### Creating Document Templates

A Document Template in Aras is just a regular Document with the **Template** checkbox checked. It contains an Office file used as the basis of any new file created from the template. The Office file used for the template should be in a regular file format (like `.docx`, `.xlsx`, or `.pptx`). There are two methods for creating Document Templates: manually in the Aras web client or by marking a Document created by the Aras Office Connector as a template. Either method requires some work in the Aras web client. It is not possible to create a template completely using the Office Productivity Connector.

#### Creating a Document Template Manually

1. Create the template file in the Office application and save it locally.
  1. Log in to the Aras web client.
  2. Create a new Document (or similar item defined as an Office Document Type).
  3. Set the following properties:
    - Number
    - Type
    - Authoring Tool
    - Template checkbox ON
  4. Attach the template file on the Files tab.
  5. Save and Close the Document.

#### Creating a Document template using the Office Productivity Connector

1. Create a Document using the Connector with one of the following approaches:
  - Use **New Aras Document** to create a new file, create the file contents, then **Save**.
  - Create the file contents locally, then **Save**.



2. Log in to the Aras web client.
  1. Search for the newly created Document and open the form.
  2. Set the Template checkbox ON.
  3. Remove any viewable file, such as PDF, if it exists.
  4. Save and Close the Document.

At this point, the template is ready to be used by the Office Productivity Connector. Regardless of the method used, the result is a Document that has the following key properties set:

**Document**

Document Number: 100002  
 Revision: A  
 State: Released  
 Name: Bicycle Frame Assembly Specification  
 Type: Ad-hoc  
 Authoring Tool: Microsoft Word  
 Version:   
 Assigned Creator: Innovator Admin  
 Designated User: Innovator Admin  
 Effective Date: 10/8/2021 11:33:38 AM  
 From Template:   
☒ Files Attached  
☐ Changes Pending  
☒ Template

**Files** Changes

| Related File [...]                        | File Type [...] | Comments | Sequ... ↑ | Is Shared                           |
|-------------------------------------------|-----------------|----------|-----------|-------------------------------------|
| Bicycle Frame Assembly Specification.docx | Microsoft Word  |          | 1         | <input checked="" type="checkbox"/> |

These properties are used for the following purposes:

- **Document Number:** The primary identifier for the template which appears in the Properties task pane.



- **Type:** Sets which Document Type the template is for. The template will only be listed when that Document Type is selected in the **New Aras Document** task pane.
- **Authoring Tool:** Controls which Office application the template will be used for. The template will only appear in the **New Aras Document** task pane when in that application.
- **Template:** Marks this Document as a template.
- **File:** The file used when creating a New Aras Document using this template.



## Other Capabilities

Other capabilities of Aras Office Productivity Connector are covered in this section.

## Property Mapping

Both Office and Aras Innovator have the concept of Properties: textual information that describes a Document. The Aras Office Productivity Connector can map properties between the Office file and Aras Innovator in both directions and at different points in the process. The options are:

| Direction                | Word | Excel | PowerPoint |
|--------------------------|------|-------|------------|
| From Office File to Aras | X    |       | X          |
| From Aras to Office File | X    |       | X          |
| From Aras to Excel Cell  |      | X     |            |
| From Excel Cell to Aras  |      | X     |            |

An administrator defines the property mappings in use. Mappings can be defined to take place only on the initial save to Aras, or on subsequent update saves. To illustrate the process, here are some examples for Word, Excel, and PowerPoint:

| Office Property | Aras Property   | Direction      | When           |
|-----------------|-----------------|----------------|----------------|
| Title           | Name            | Office to Aras | Create         |
| Title           | Name            | Aras to Office | Update         |
| Subject         | Description     | Office to Aras | Create, Update |
| Revision        | Revision        | Aras to Office | Create, Update |
| Aras Document   | Document Number | Aras to Office | Create, Update |

When properties are mapped from Office to Aras, the values can be set from within the Office application and will be incorporated into the Aras Document properties.

To set these properties:

- **From Aras Office Productivity Connector:**

Use the **Properties** command to display those properties that are mapped with Aras. The Properties command appears in two places: from within the **New Aras Document** task pane and in the ribbon.



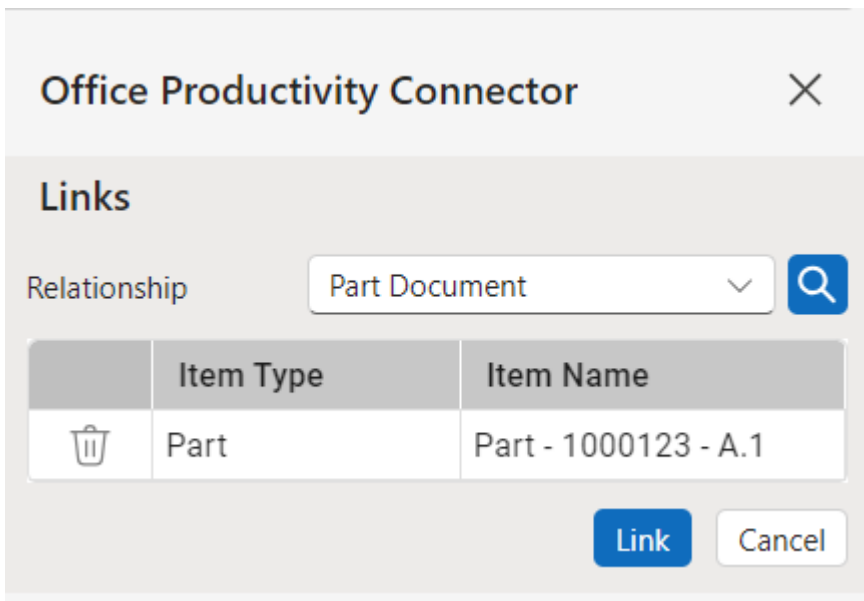
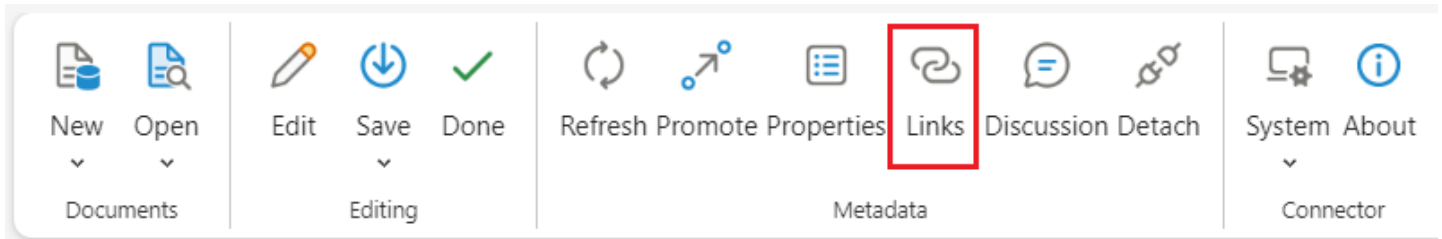
All properties mapped between Office and Aras (in both directions) are shown in this dialog. However, only those mapped from Office to Aras are editable. Those mapped from Aras to Office are read-only and displayed with a grey background. When accessing Properties from **New Aras Document**, users can edit properties mapped from Office to Aras on **Create**. Users can edit properties mapped from Office to Aras on Update when accessing Properties from the ribbon.

| Property        | Value               |
|-----------------|---------------------|
| Aras Created On | 2024-10-09T19:11:21 |
| Title           | Test                |
| Aras Author     | Innovator Admin     |
| Title           | Test                |
| Subject         |                     |
| Aras Document   | 100024              |
| Revision        | A                   |
|                 |                     |

When properties are mapped from Aras to Office, the values can be set from Aras Innovator and then set into the Office file's Properties dialog. To do this, you must edit the Document from within the Aras web client. Some Aras properties, like **Revision**, are automated within Aras and not directly editable. The Office file will also update properties mapped from Aras to Office when the **Refresh** button is clicked in the Aras toolbar.

## Item Links

As shown in the *Creating and Saving Documents* section, an Aras Item, such as a **Part or Project**, can be linked when the Aras Document is first created. However, additional Item links can be added or removed after the initial creation using the **Links** command in the Aras ribbon.



If already existing links exist, they will be displayed in the task pane, and **the Delete Icon button can be clicked** to remove them. Any number of existing links can be added by selecting the Item Type and then searching for and selecting the desired Item(s). The advantage of creating the link during the initial creation of the Document is that the **File Name** and **Document Number** can be based on the linked Item. If a link is created later using **Links**, it does not affect the **File Name** and **Document Number**.

## Viewable Files and Visual Collaboration

A useful feature of the Aras Office Productivity Connector is that it automates the creation of viewable files, such as PDFs, during the saving process. All settings that control viewable file generation are

controlled by the administrator to enforce standard processes within the company. There are two settings the administrator should highlight:

- The viewable file type created for each Office application. It can be different for each application but is typically set to PDF for use with Aras Visual Collaboration.
- Whether the viewable file is created automatically on every **Save to Aras**, only on **Done**, or is user-selectable (in which case the **Save and Generate PDF** option appears in the ribbon).

When viewable files are created, they are attached to the same Document as the regular Office file and will be visible in the Files Tab and the Web Client. If the file is PDF, it can be viewed directly in the Aras web client using Visual Collaboration, which provides view, markup, and threaded discussion collaboration. Additionally, the file's hyperlink can be clicked to view it in an external viewer like Adobe Reader.

**View in external viewer, like Adobe Reader**

**View with Visual Collaboration**

## SharePoint Integration

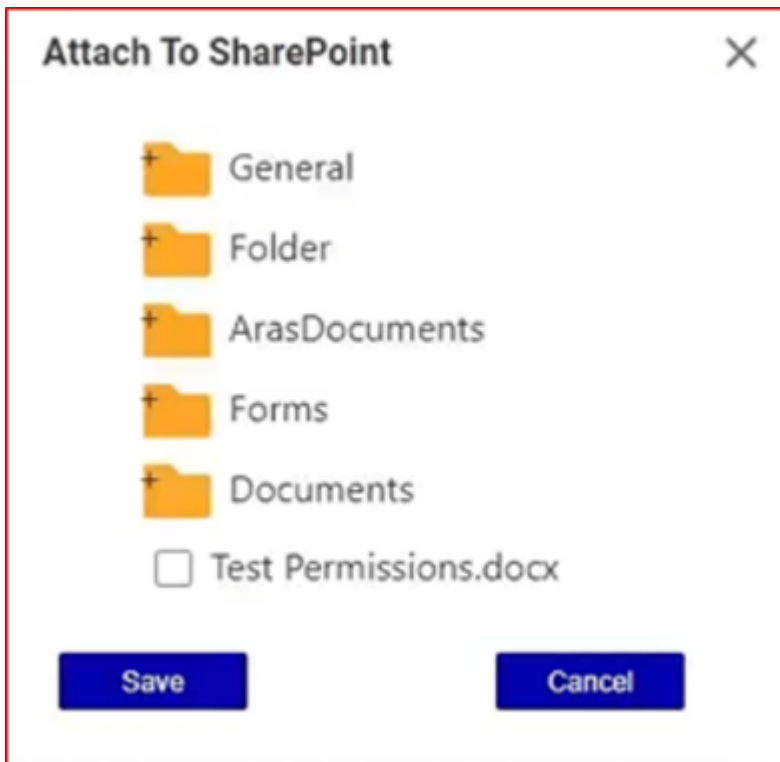
The SharePoint integration within the Aras Office Productivity Connector allows the management of documents within Aras and collaboration on updates inside SharePoint.



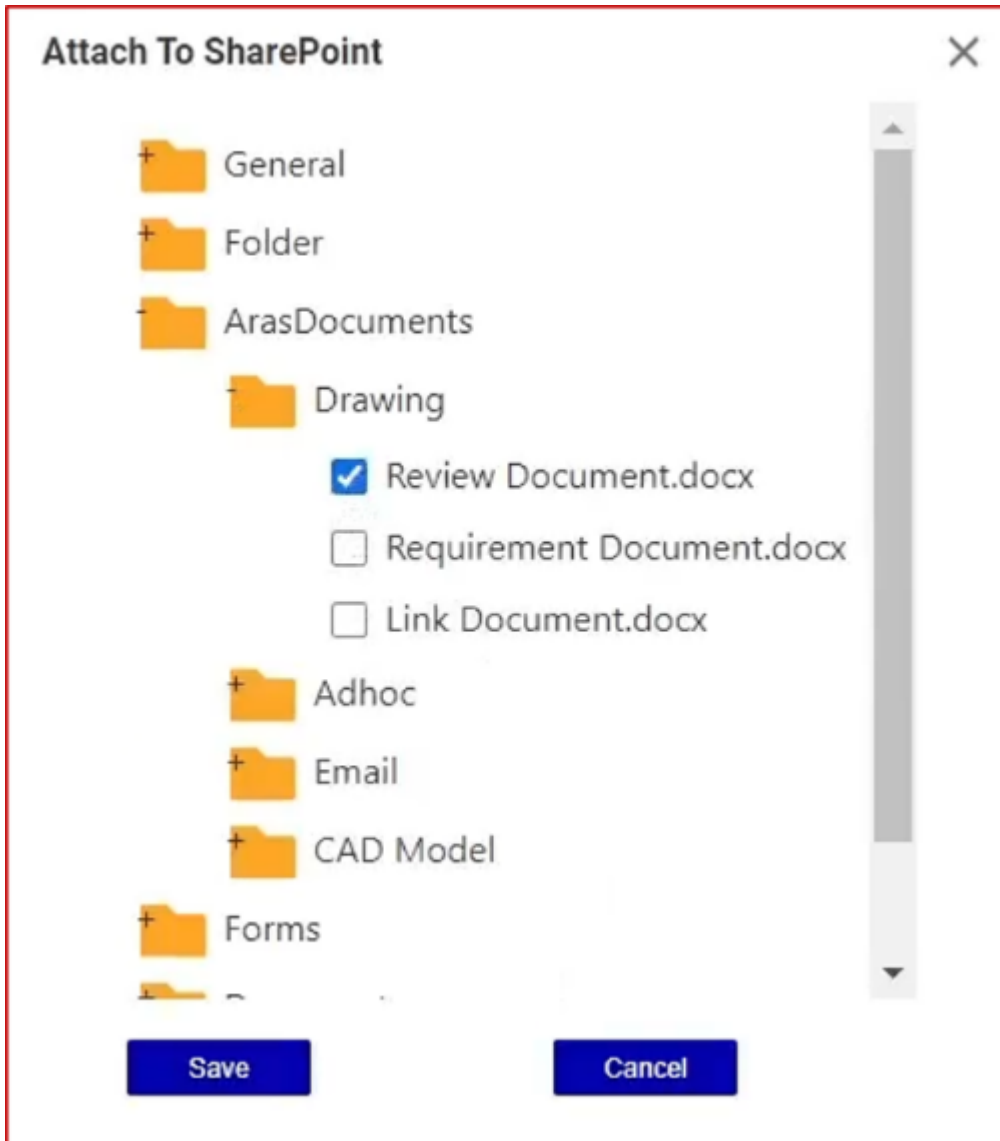
## Attaching a SharePoint File to Aras

SharePoint files can be attached to **Document** Items in Aras Innovator. To attach a SharePoint file to an Aras document:

1. Open the Document to attach the SharePoint file.
  1. Click the **Attach from SharePoint** Icon to open the Attach from SharePoint dialog.



2. Select the SharePoint document to attach and click **Save**.



3. The Aras Document includes a viewable PDF of the SharePoint file and a link to the file in SharePoint.

1007

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Edit

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⋮

Open in Office

Document

Document Number

Revision

State

Assigned Creator

1007

A

Preliminary

Name

Designated User

Review Document

Type

Authoring Tool

Version

Effective Date

Ad-hoc

Microsoft Word

Description

From Template

☒ Files Attached
 ☐ Changes Pending
 ☐ Template

Comments

Files

Changes

Files

☆

⚙

🗨

🔍

🔍

Hidden

⚙

📺

🔗

🔗

🗨

⬅

➡

| Related File [...]                    | File Name ↑ 2       | File Type [...]              | Comments | Seq... ↑ 1 | SharePoint File Name                 |
|---------------------------------------|---------------------|------------------------------|----------|------------|--------------------------------------|
| 📎 <a href="#">Review Document.pdf</a> | Review Document.pdf | <a href="#">PDF Document</a> |          | 128        | <a href="#">Review Document.docx</a> |

< Prev

Next >

Page: 1 of 1

1 Results

🔍

**Important**

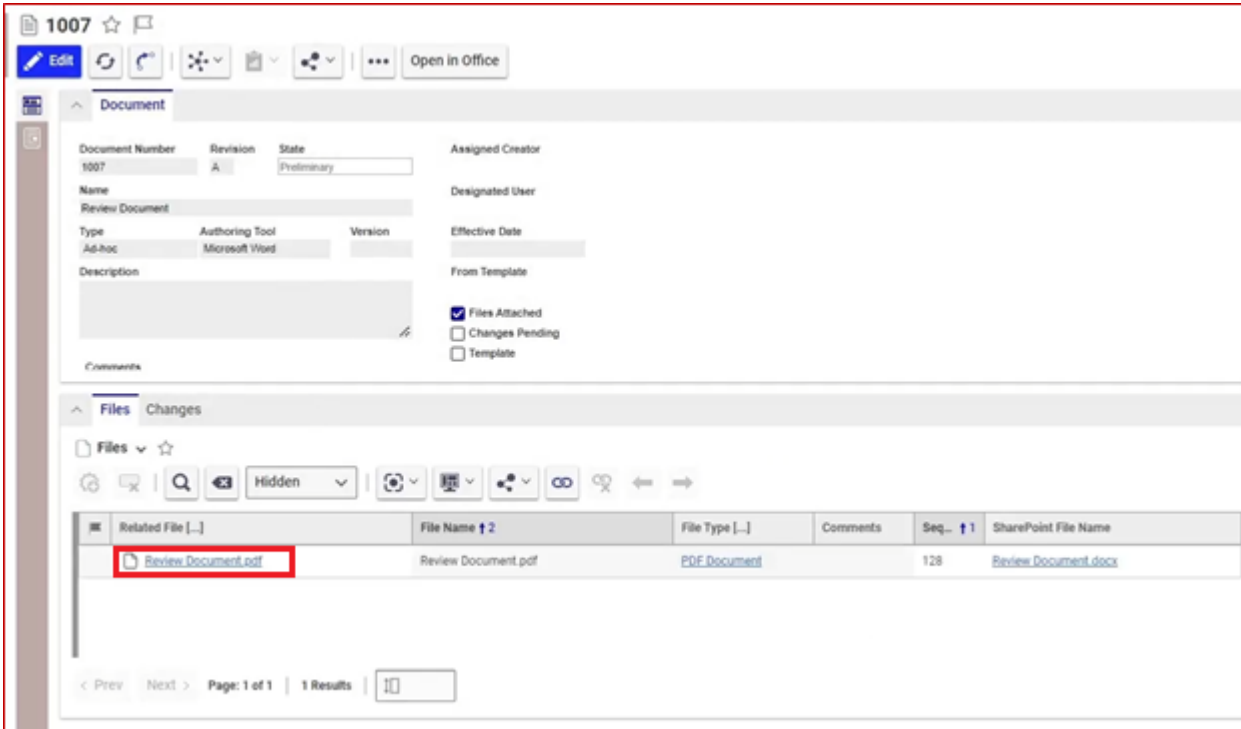
SharePoint files attached to Aras Documents cannot be removed from SharePoint.

SharePoint files attached to Aras Documents cannot be removed from SharePoint.

## Viewing an Attached SharePoint File

To view an attached SharePoint file in SharePoint:

1. Open the Document in Aras Innovator.
  1. Click on the **Related File Name** to open the PDF of the SharePoint file.



The screenshot shows the 'Document' tab in the Office Productivity Connector. The document details include:

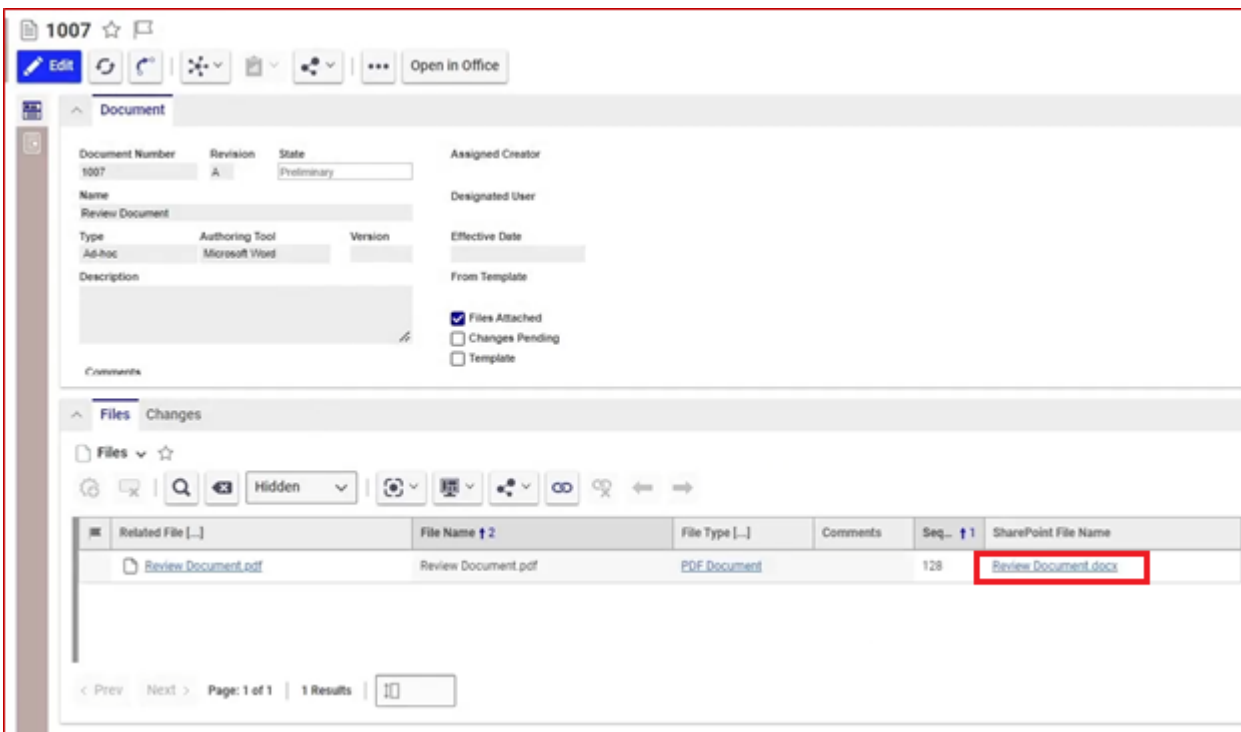
- Document Number: 1007
- Revision: A
- State: Preliminary
- Assigned Creator
- Name: Review Document
- Designated User
- Type: Ad-hoc
- Authoring Tool: Microsoft Word
- Version
- Effective Date
- Description
- From Template
- Files Attached: ☒ Files Attached
- Changes Pending: ☐ Changes Pending
- Template: ☐ Template

The 'Files' tab is active, showing a list of files. The first file, 'Review Document.pdf', is highlighted with a red box. The table below shows the file details:

| Related File [...]                                                                                    | File Name ↑ ↓       | File Type [...] | Comments | Seq. ↑ ↓ | SharePoint File Name                 |
|-------------------------------------------------------------------------------------------------------|---------------------|-----------------|----------|----------|--------------------------------------|
|  Review Document.pdf | Review Document.pdf | PDF Document    |          | 128      | <a href="#">Review Document.docx</a> |

Navigation: < Prev Next > Page: 1 of 1 1 Results

2. Click on the SharePoint File Name to open the file in SharePoint.



The screenshot shows the 'Document' tab in the Office Productivity Connector. The document details are the same as in the previous screenshot. The 'Files' tab is active, showing a list of files. The first file, 'Review Document.pdf', is highlighted with a red box. The table below shows the file details:

| Related File [...]                                                                                      | File Name ↑ ↓       | File Type [...] | Comments | Seq. ↑ ↓ | SharePoint File Name                 |
|---------------------------------------------------------------------------------------------------------|---------------------|-----------------|----------|----------|--------------------------------------|
|  Review Document.pdf | Review Document.pdf | PDF Document    |          | 128      | <a href="#">Review Document.docx</a> |

Navigation: < Prev Next > Page: 1 of 1 1 Results

### Important

To collaborate on SharePoint files, the Aras Document must be in the **Preliminary** or the **In Work** State. When the Aras Document is in the **In Review** State, the SharePoint file will be opened in read-only mode.

## Syncing Changes from SharePoint

Syncing changes from SharePoint updates the PDF on the Aras Document. To sync changes from SharePoint to the Aras Document:

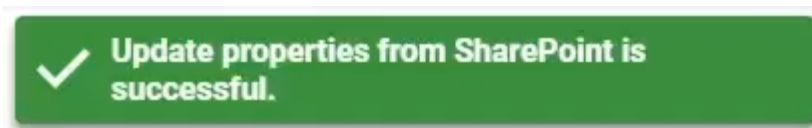
1. Open the Document in Aras Innovator
  1. Click the **Update from SharePoint** icon button.

The screenshot shows the Aras Innovator interface for document 1007. The 'Document' tab is active, displaying metadata such as Document Number (1007), Revision (A), State (Preliminary), and Assigned Creator. Below this, the 'Files' tab is selected, showing a table of related files. The 'Update from SharePoint' button, represented by a double-headed arrow icon, is highlighted with a red box in the toolbar above the table.

| Related File [...]  | File Name ↑         | File Type [...] | Comments | Seq... ↑ | SharePoint File Name |
|---------------------|---------------------|-----------------|----------|----------|----------------------|
| Review Document.pdf | Review Document.pdf | PDF Document    |          | 128      | Review Document.docx |

At the bottom of the interface, there is a pagination bar showing '< Prev', 'Next >', 'Page: 1 of 1', '1 Results', and a search icon.

2. A notification appears when the sync is complete.



## Detaching a SharePoint File from Aras

1. Open the Document from which to detach the SharePoint file.
  1. Click the **Detach** icon button.
  2. Confirm to detach the SharePoint file from Aras.



3. The link to the SharePoint file will be removed from the Document within Aras Innovator.

1007

Edit

Open in Office

Document

Document Number  
1007

Revision  
A

State  
Preliminary

Assigned Creator

Name  
Review Document

Designated User

Type  
Ad-hoc

Authoring Tool  
Microsoft Word

Version

Effective Date

Description

From Template

☒ Files Attached  
☐ Changes Pending  
☐ Template

Comments

Files

Changes

Files

Hidden

| Related File [...]                  | File Name ↑ 2       | File Type [...]              | Comments | Seq... ↑ 1 | SharePoint File Name |
|-------------------------------------|---------------------|------------------------------|----------|------------|----------------------|
| <a href="#">Review Document.pdf</a> | Review Document.pdf | <a href="#">PDF Document</a> |          | 128        |                      |

< Prev   Next >   Page: 1 of 1 | 1 Results |