Aras Office Connector 12.0R4

Installation Guide

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Document Conventions

The following table highlights the document conventions used in the document:

Table 1:   Document Conventions

Convention	Description
Bold	Emphasizes the names of menu items, dialog boxes, dialog box elements, and commands. Example: Click **OK**.
`Code`	Code examples appear in `courier` font. It may represent text you type or data you read.
`Yellow highlight`	Code highlighted in yellow draws attention to the code that is being indicated in the content.
`Yellow highlight with red text`	Red text highlighted in yellow indicates the code parameter that needs to be changed or replaced.
Italics	Reference to other documents.
Note:	Notes contain additional useful information.
Warning	Warnings contain important information. Pay special attention to information highlighted this way.
Successive menu choices	Successive menu choices may appear with a greater than sign (-->) between the items that you select consecutively. Example: Navigate to **File** --> **Save** --> **OK**.

1 Overview

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

The following are the basic sequence of steps to fully install the Aras Office Connector.

1. Install Aras Innovator.

2. Install Aras Office Connector components in Aras Innovator.

3. Install Aras Office Connector components to Microsoft Office.

Note: The following procedures are based on new installations of Microsoft Office and Aras Innovator, and you should contact your vendor for assistance if you are working with a customized instance of either product.

2 Installing Aras Innovator

The first step required to install Aras Office 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 for use with Aras Office Connector.

2.1 Aras Innovator

The first step is to install Aras Innovator. Subscribers can get the Aras Innovator CD Image from the Aras FTP site in the InnovatorLatestRelease folder.

Get the Installation documentation for the Aras Innovator instance from the Documentation folder of the Aras Innovator CD Image.

At the time of release, the following version of Aras Innovator is supported by the Aras Office Connector 12.0R4:

- Aras Innovator 12.0 SP9

- Aras Innovator 12.0 SP10

If you are using an earlier version of Aras Innovator, please upgrade before installing the connector.

For any upgrade assistance, consult Aras Support (support@aras.com) before installing Aras Office Connector.

2.2 Confirming the Aras Innovator Installation

Use the following procedure to check if your Aras Innovator code tree and database meet the minimum requirements to apply the Aras Office Connector Solution AML:

1. Log in to Aras Innovator as an administrator.

2. From the Main Menu select **Help --> About**.

3. Confirm that the dialog shows one of the following:

   o Aras Innovator 12.0 SP9 Build: 24090

   o Aras Innovator 12.0 SP10 Build: 25121

Figure 1.

4. Close the dialog.

5. From the TOC, select **Administration\Variables**.

6. Confirm that the following variable is listed:

Version Major	Version Minor	VersionServiceUpdate	VersionServicePack
12	0	0	SP9
12	0	0	SP10

2.3 Feature License Key

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

1. Log into Aras Innovator as an administrator.

2. Go to **Administration\Feature Licenses**.

3. The Aras Office Connector is activated with the Feature License provided for the Subscription. If a Subscription feature license is found, check the expiration date to confirm that the license is still active.

2.3.1   Requesting a Feature License

In order to request a feature license activation key, customers with an active Aras subscription can send an email to licenses@aras.com or to their account representative using the following format:

- Subject – "Aras Office Connector Activation Key Required"

- Body - Version of Aras Innovator

You will receive a reply containing the Feature License activation key.

2.3.2 Installing the License

Once you have the activation key, install the feature license as follows:

1. Log into Aras Innovator as an administrator.

2. From the main menu toolbar, select **Tools --> Admin --> Licenses --> Activate Feature**.
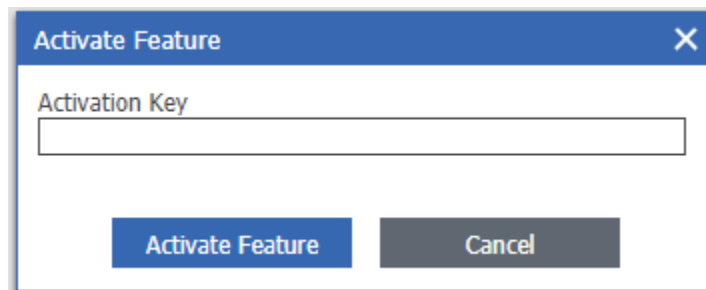

Figure 2.

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

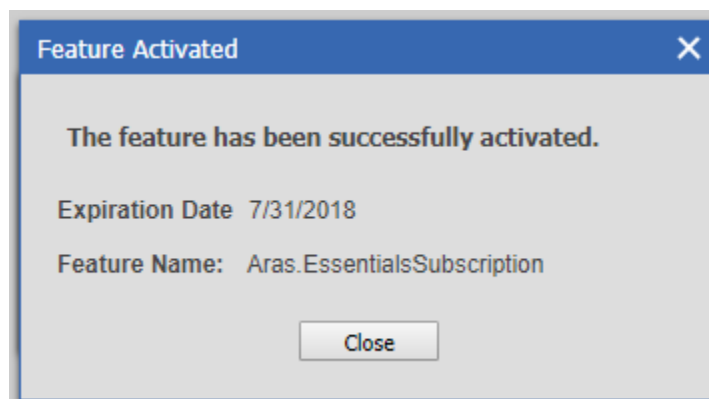A success message similar to the following should appear.

Figure 3.

3 Installing Aras Office Connector Server Components

Once the installation of Aras Innovator is complete and confirmed, the Aras Office Connector must modify the Aras Innovator database with the metadata required to run the integration. Before applying these changes, you should confirm you have all required components.

Requirements:

- Aras Innovator 12.0 SP9 or 12.0 SP10

- Aras Office Connector Feature License

- Aras Update Tool

    or

- Aras Innovator Package Import Export Utilities

3.1 Notification and Backup

1. Notify users that the system will be down at a scheduled time, and they should log out of the system prior to the start of the process.

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

2. Backup the database.

3. Place this file in a safe location, as it will be necessary to restore from it if the process fails.

3.2 Applying the Aras Office Connector AML Package

It is possible to install Aras Office Connector using the Automated Installation Option (using the Aras Update tool) or the Manual Installation Option (using the Aras Import Tool).

3.2.1 Automated Installation Option

1. Copy and unzip the Aras Office Connector CD Image on the local computer.

2. Enable the Super User login.

3. Launch the **ArasUpdate.exe** file as administrator.

    On a default installation, the **ArasUpdate.exe** file can be found in the `C:\Program Files (x86)\Aras\Aras Update\` directory.

4. Click on the **Local** option on the left sidebar and then add the package reference to Aras Office Connector.

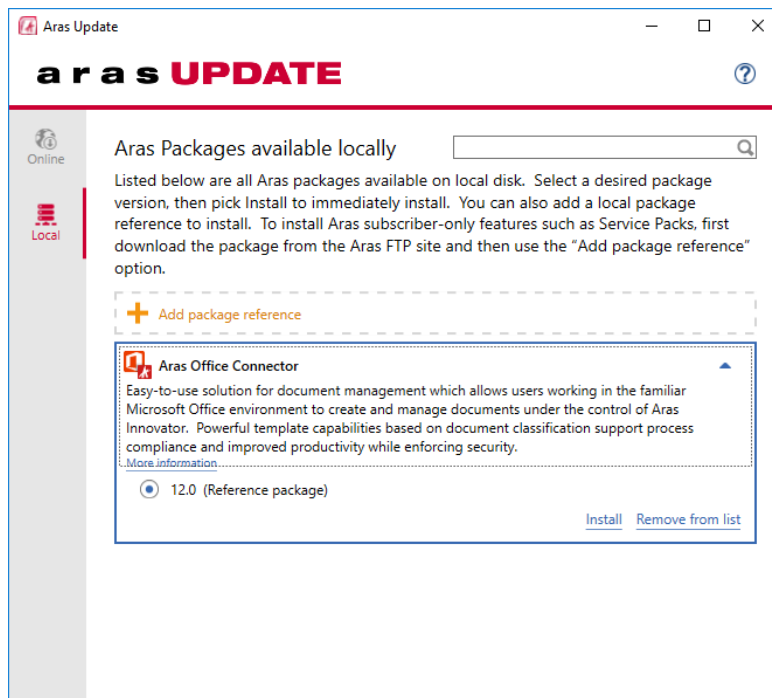The package should point to the top level of the Aras Office Connector CD Image.

Figure 4.

5. Select the Import package and click **Install**.
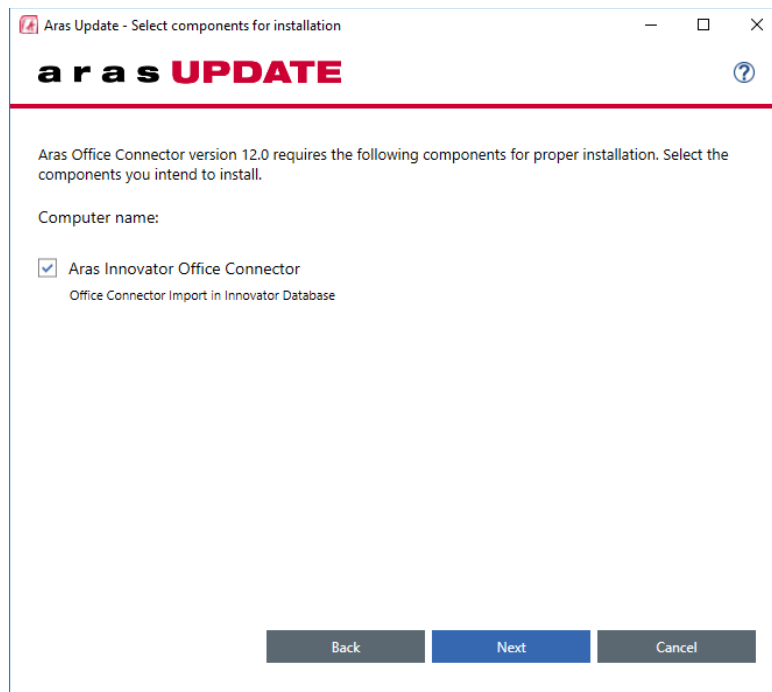

Figure 5.

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

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

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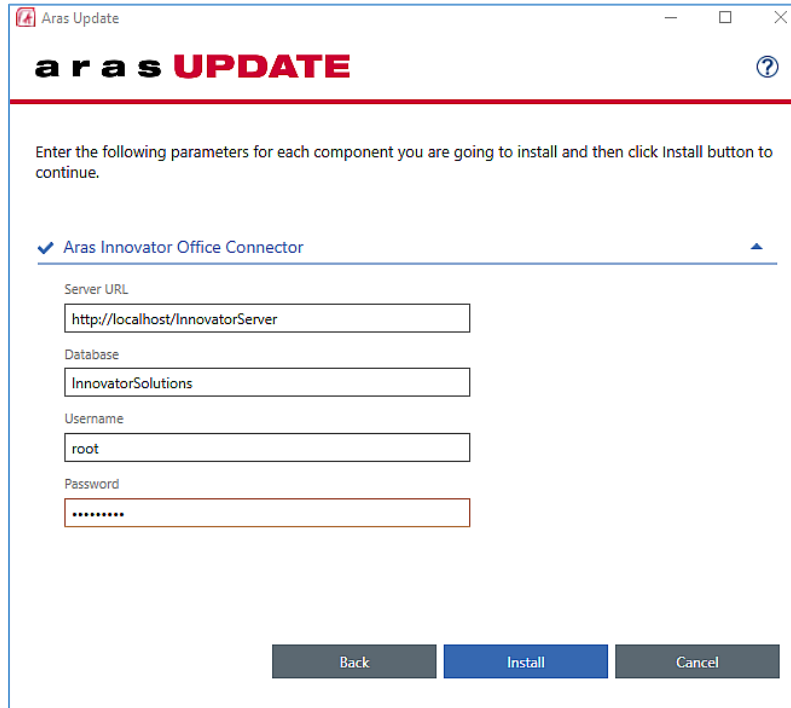

Figure 6.

- **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 should import everything required for Aras Office Connector.

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

3.2.2 Manual Installation Option

1. You will need to import the database package with the Package Import Export Utilities (For more information using this tool, please see the *Aras Innovator 12.0 - Package Import Export Utilities* documentation.)

   a. You will need to enable the "Super User" login to perform this step.

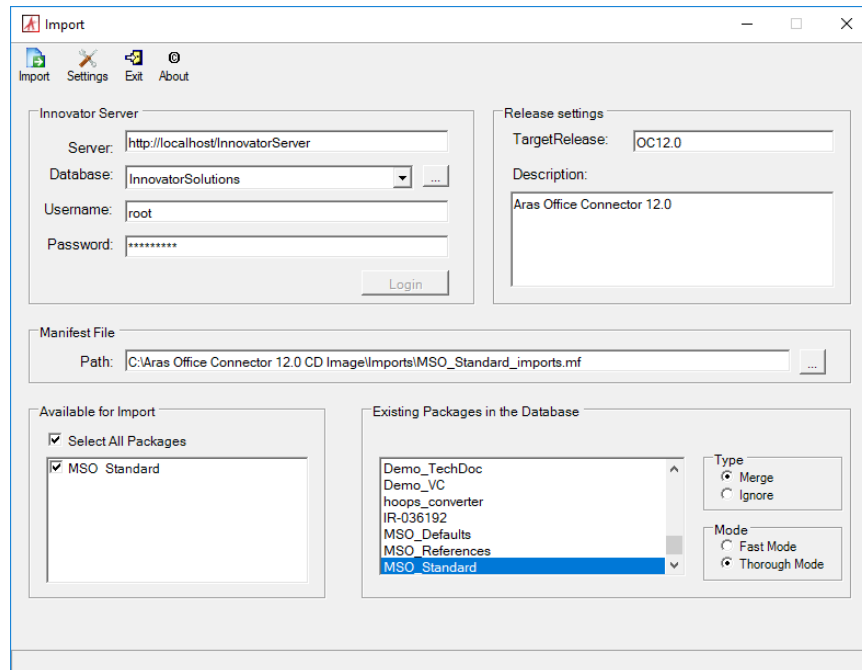   b. Browse to the \PackageImportExportUtilities\Import\ folder and run the Import.exe file

Figure 7.

c. Enter the following information:

1. Server = The connection URL for Aras Innovator

2. Database = The target Aras Innovator database

3. Username = root

4. Password = Password for "root" login (Default is "innovator")

5. Target Release = OC12.0R4

6. Description = Aras Office Connector 12.0R4

7. Manifest File Path = The manifest is found in the unzipped patch folder in `\Aras Office Connector 12.0R4\Imports\MSO_Standard_imports.mf`

8. Available for Import = Check "`MSO References`" and "`MSO Standard`"

9. Type = Merge

10. Mode = Thorough Mode

d. Click the **Import** button.

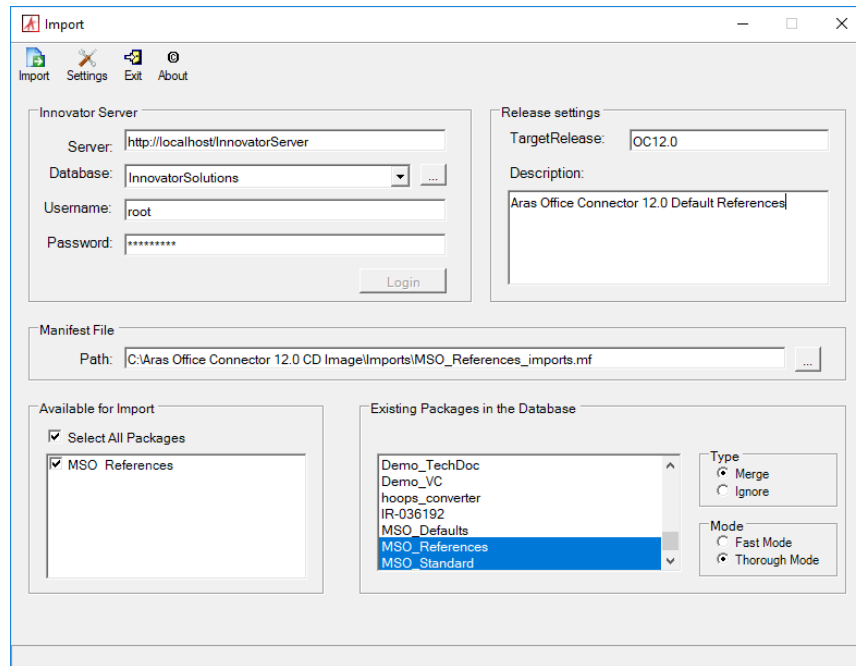**2.** After the import is completed, import the default Reference items.

Figure 8.

a. Input the connection information:

1. Server = The connection URL for Aras Innovator

2. Database = The target Aras Innovator database

3. Username = root

4. Password = Password for "root" login (Default is "innovator")

5. Target Release = OC12.0R4

6. Description = Aras Office Connector 12.0R4 Default References

7. Manifest File Path = The manifest is found in the unzipped patch folder in `\Aras Office Connector 12.0R4\Imports\MSO_References_imports.mf`

8. Available for Import = Check `"MSO References"`

9. Type = Merge

10. Mode = Thorough Mode

b. Click the **Import** button again.

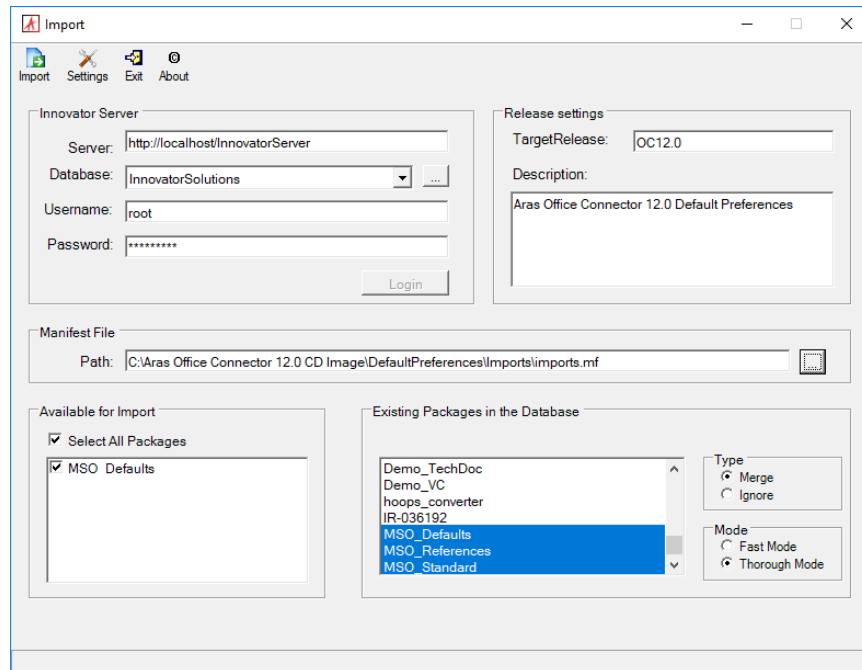3. After Reference items are imported, import the default preferences.

Figure 9.

a. Input the connection information:

1. Server = The connection URL for Aras Innovator

2. Database = The target Aras Innovator database

3. Username = root

4. Password = Password for "root" login (Default is "innovator")

5. Target Release = OC12.0R4

6. Description = Aras Office Connector 12.0R4 Default Preferences

7. Manifest File Path = The manifest is found in the unzipped patch folder in `\Aras Office Connector 12.0R4\Optional\DefaultPreferences\Imports\imports.mf`

8. Available for Import = Check `"MSO Defaults"`

9. Type = Merge

10. Mode = Thorough Mode

b. Click the **Import** button again.

Note: Remember to disable the "Super User" login once you are done. This login should not be enabled in production.

3.3 Confirming the Installation

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

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

Name	Value
Office Connector	12.0R4

If at any time the installation fails, revert to your backups and contact Aras Support at support@aras.com.

4 Installing the Aras Office Connector Client Components

The Aras Office Connector must modify Microsoft Office to add the integration components. Before applying these changes, you should confirm your installation of Microsoft Office meets the minimum requirements to run the Aras Office Connector integration.

Requirements:

- Windows 8.1, or Windows 10
- Microsoft Office 2013 (Enterprise or Professional editions recommended)
- Microsoft Office 2016 (Enterprise or Professional editions recommended)
- Microsoft Office 365, Desktop version
- Microsoft Office 2019 (Enterprise or Professional editions recommended)

Note: Version 2013 of Microsoft Visio is not supported.

4.1 Installing the Microsoft Office Add-in

1. Shut down all Office programs on the client PC:
   - Microsoft Outlook
   - Microsoft Word
   - Microsoft Excel
   - Microsoft PowerPoint
   - Microsoft Visio
2. Copy the `ArasOfficeConnectorSetup.msi` to the Client PC.
3. Run the `ArasOfficeConnectorSetup.msi`
4. Click **Next**.

Figure 10.

5. Specify the path where the Aras Office Connector client components will be installed in the Install **Aras Innovator Microsoft Office Connector to**: field.

    a. (Optional) Check the **Install Office Connector for all users** option to install the extension for all users specified on the PC.

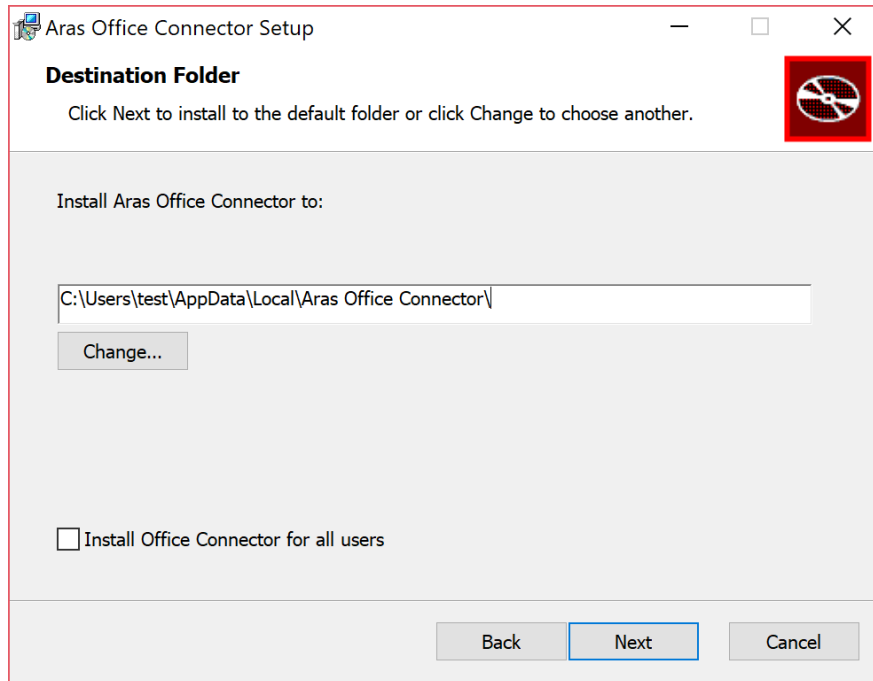| Note:	By default it will be installed to `%LOCALAPPDATA%\Aras Corporation\Aras Innovator Microsoft Office Connector\` Selecting the **Install Office Connector for all users** changes the default directory to `C:\Program Files (x86)\Aras Innovator Microsoft Office Connector\`

Figure 11.

6. Specify the working directory that Aras Office Connector will use to download files locally.
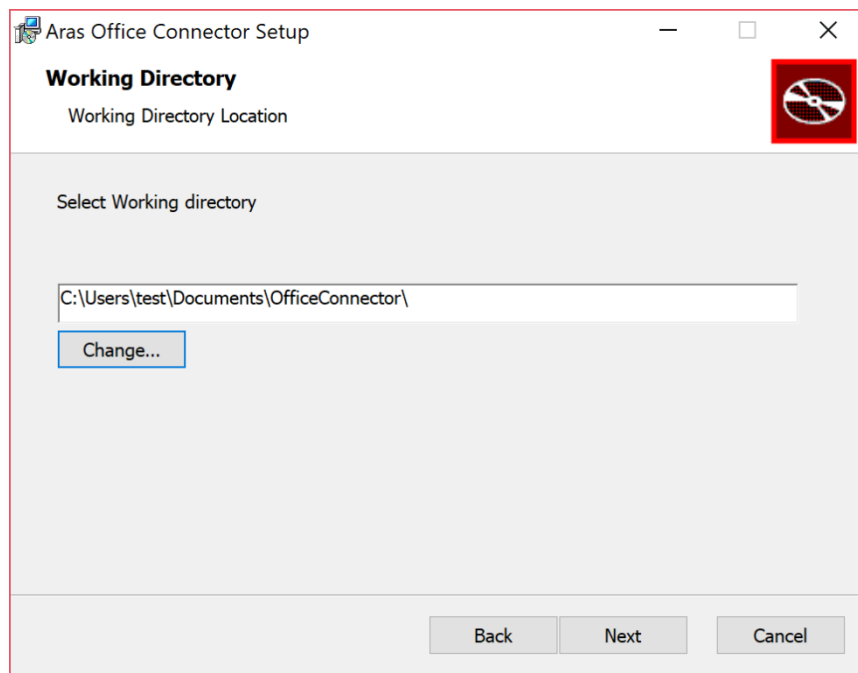

Figure 12.

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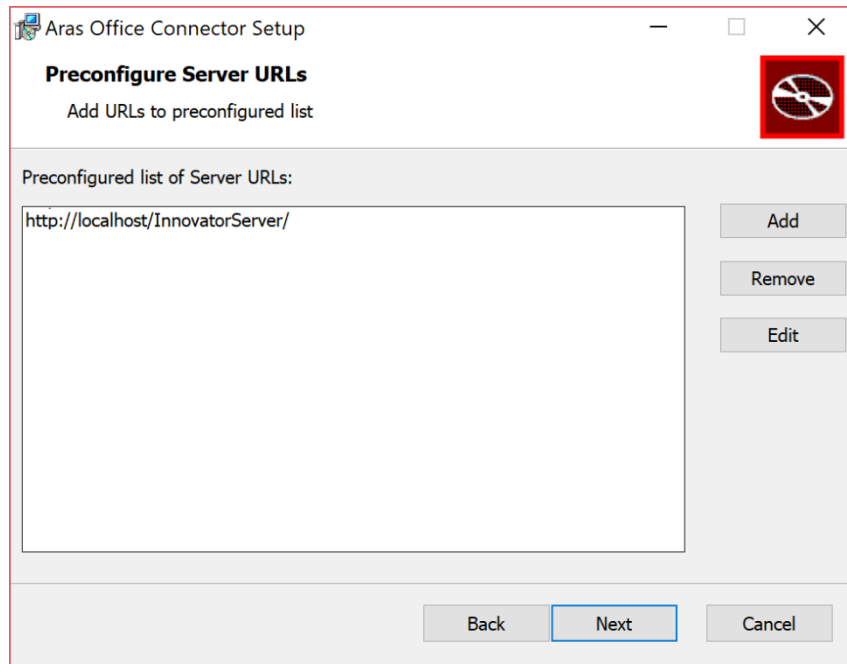7.   (Optional) Add any preconfigured URLs to connect to Aras Innovator.
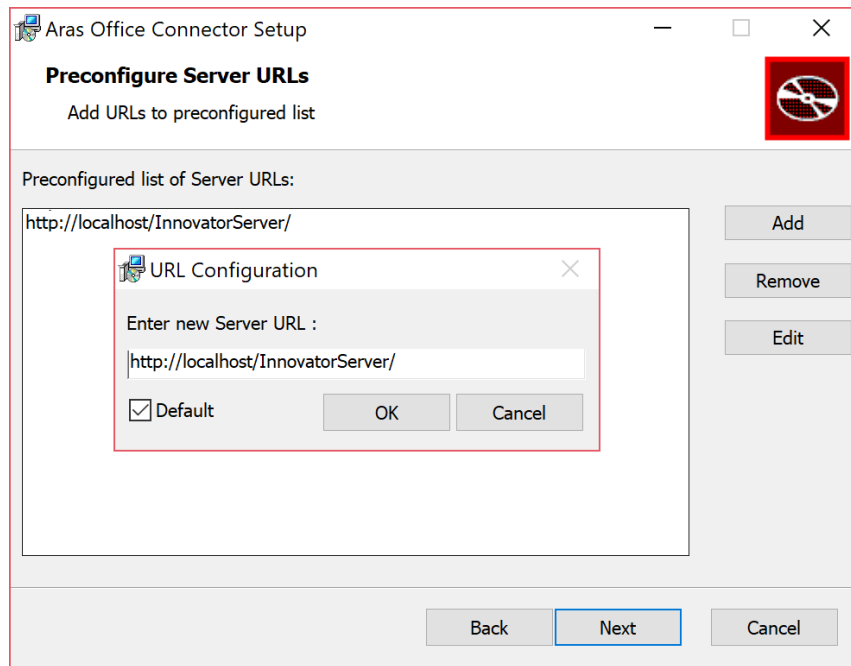

Figure 13.

Figure 14.

Note: These URLs will be preconfigured for the End User, but they will be able to change, add, or remove any URLs later.

8. Specify **Custom** to select the MS Office applications where Aras Office Connector should be installed, or **Complete** to install the add-on on all MS Office Applications.
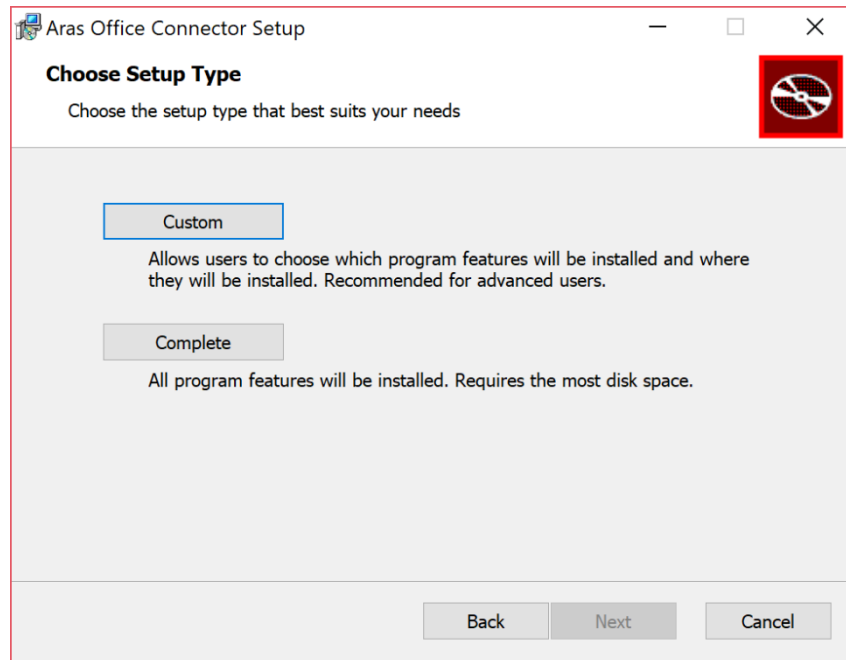

Figure 15.

9. Once MS Office applications have been selected, click **Install**.
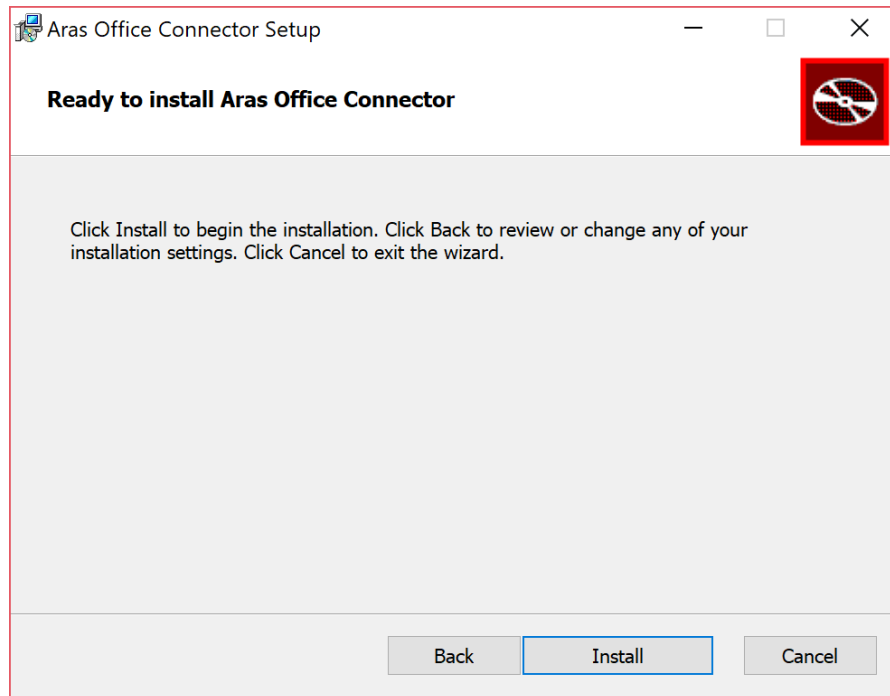

Figure 16.

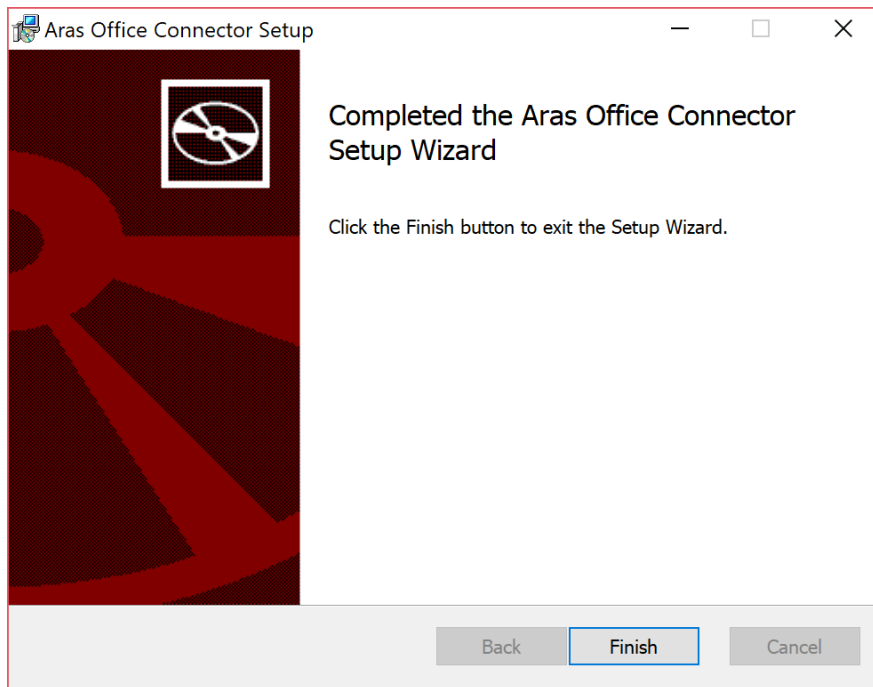10. Click **Finish** to exit from the installation.

Figure 17.

11. Open Microsoft Word.

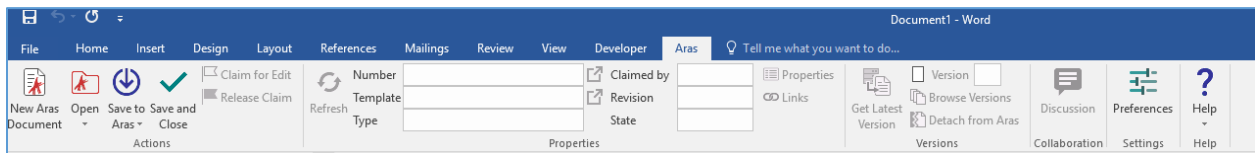12. Confirm that the Aras ribbon has been added to Microsoft Word.

Figure 18.

5 Post Installation

It is recommended that you review the *Aras Office Connector 12.0R4 – Administration Guide* after the installation is complete. Additional changes to the Document Form and Document Class Structure may be required to use all features.

For end-users, the *Aras Office Connector 12.0R4 - User Guide* is available from the Documentation folder of the CD Image. Additionally the on-line help can be referenced from the Aras Ribbon in Office or directly at https://www.aras.com/help/office/12-0R4/.

6 Upgrading from a Previous Version

6.1 Upgrading from version 11.0 of Aras Office Connector

Upgrades from Office Connector version 11 to version 12 are done as part of the upgrade services of Aras Innovator. The upgrade Services are a benefit of a Premier Subscription package, and can be requested as a service from Aras Support.

Note: When requesting Upgrade Services for an upgrade of Aras Innovator, notify Aras Support that your production instance includes Aras Office Connector.

6.2 Upgrading from version 12.0R1 of Aras Office Connector

The files necessary to upgrade Aras Office Connector 12.0R1, 12.0R2, or 12.0R3 to version 12.0R4 are available in the 12.0R4 CD image, inside the **Aras Office Connector 12.0R4 Upgrade Patch.zip** file. For upgrade instructions, please refer to the *Aras Office Connector 12.0R4 - Upgrading from Version 12.0R1* guide.