Aras Office Connector 14

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 14:

Aras Innovator 14

If you are using an earlier version of Aras Innovator, please upgrade before installing the connector. For any upgrade assistance, consult Aras Support (<u>support@aras.com</u>) 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 the following:
 - Aras Innovator 14
- 4. Close the dialog.
- 5. From the TOC, select Administration\Variables.
- 6. Confirm that the following variable is listed:

Version	Version	Version	Version
Major	Minor	ServiceUpdate	ServicePack
14	0	0	None

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:

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- 1. Log into Aras Innovator as an administrator.
- 2. Go to Administration\Feature Licenses.
- 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 <u>licenses@aras.com</u> 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.

Activate Feature	×
Activation Key	
	Activate Cancel



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

A success message similar to the following should appear.





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 14
- 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.

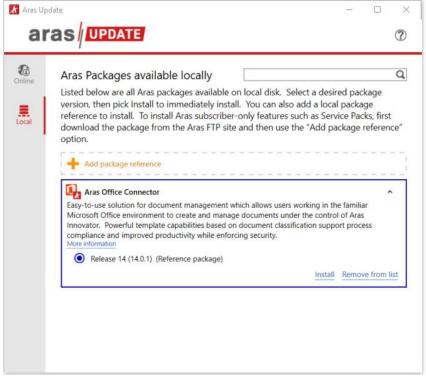


Figure 3.

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



🔏 Aras Update - Select components for installation		-		×
				?
Aras Office Connector version 12.0 requires the following comp components you intend to install. Computer name:	ionents for proper install	ation. Se	lect the	2
 Aras Innovator Office Connector Office Connector Import in Innovator Database 				



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.



Aras Update	n component you a	re going to install and the	n click Insta	Il buttor	× ⑦ n to
✓ Aras Innovator Office Connector					^
Server URL					
http://localhost/InnovatorServer					
Database					
InnovatorSolutions					
Username					
root					
Password					
••••••					
-	Back	Install		ncel	-

Figure 5.

- 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 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



ort Settings				
Innovator Ser	rver		Release settings	
Server:	http://localhost/InnovatorServer		TargetRelease: OC14	
Database:	InnovatorSolutions	▼	Description:	
Username:	root		Aras Office Connector 14	
Password:				
Manifest File Path:	C:Aras Office Connector 14 CD	Login	d_imports.mf	
	C:\Aras Office Connector 14 CD			
Path: Available for Select Al	C:Aras Office Connector 14 CD Import II Packages	mage\Imports\MSO_Standarc	the Database	
Path: Available for I	C:Aras Office Connector 14 CD Import II Packages	Existing Packages in dynamic_model_co Extended Classifici fixes	onstructor_default	lerge
Path: Available for Select Al	C:Aras Office Connector 14 CD Import II Packages	Existing Packages in dynamic_model_o Extended Classifici fixes hoops_converter	onstructor_default Type C Ig Mode	lerge
Path: Available for Select Al	C:Aras Office Connector 14 CD Import II Packages	Existing Packages in dynamic_model_co Extended Classifici fixes	onstructor_default	lerge Inore

Figure 6.

- 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 = OC14
 - 6. Description = Aras Office Connector 14
 - 7. Manifest File Path = The manifest is found in the unzipped patch folder in \Aras Office Connector 14\Imports\MSO_Standard_imports.mf
 - 8. Available for Import = Check all packages
 - 9. Type = Merge
 - 10. Mode = Thorough Mode
- d. Click the Import button.



2. After the import is completed, import the default Standard Setting items.

者 Import				-	×
Import Settings	⊲∑ © Exit About				
Innovator Se Server: Database: Username: Password:	http://localhost/InnovatorServer	Under Contraction of	Release settings TargetRelease: OC14 Description: Aras Office Connector 14 Standa	rd Settings	
Available for			dardSettings_imports.mf		
MSO S	andardSettings	dynamic_mode Extended Class fixes hoops_convert MSO_Defaults MSO_Reference MSO_Standard	er	Type Merge Ignore Mode Fast Mo Thoroug	

Figure 7.

- 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 = OC14
 - 6. Description = Aras Office Connector 14 Standard Settings
 - 7. Manifest File Path = The manifest is found in the unzipped patch folder in \Aras Office Connector 14\Imports\MSO_StandardSettings_imports.mf
 - 8. Available for Import = Check "MSO References"
 - 9. Type = Merge
 - 10. Mode = Thorough Mode
- b. Click the **Import** button again.
- 3. After the import is completed, import the default Reference items.



Import	7 0		- 0
oort Settings	⊷ <mark>∑</mark> © Exit About		
Innovator Ser	rver		Release settings
Server:	http://localhost/InnovatorServer		TargetRelease: OC14
Database: InnovatorSolutions		▼	Description:
Username:	root		Aras Office Connector 14 Default References
Password:	*****		
	1		
		Login	1
Manifest File Path:	C:\Aras Office Connector 14 CD I	Image\Imports\MSO_Refer	ences_imports.mf
Available for	Import	Existing Packages	s in the Database
Available for		Existing Packages	in the Database
	II Packages	dynamic_model Extended Classi fixes	_constructor_default
Select A	II Packages	dynamic_model Extended Classi fixes hoops_converte MSO_Defaults	_constructor_default fication r Type C Ignore Mode
Select A	II Packages	dynamic_model Extended Classi fixes hoops_converte	_constructor_default fication r Type C Ignore Mode

Figure 8.

- a. Input the connection information:
 - 11. Server = The connection URL for Aras Innovator
 - 12. Database = The target Aras Innovator database
 - 13. Username = root
 - 14. Password = Password for "root" login (Default is "innovator")
 - 15. Target Release = OC14
 - 16. Description = Aras Office Connector 14 Default References
 - 17. Manifest File Path = The manifest is found in the unzipped patch folder in \Aras Office Connector 14\Imports\MSO_References_imports.mf
 - 18. Available for Import = Check "MSO References"
 - 19. Type = Merge
 - 20. Mode = Thorough Mode
- b. Click the Import button again.



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

🛦 Import				- 🗆 ×
Import Settings	-√3 © Exit About			
Innovator Se Server: Database: Username: Password: Manifest File Path:	ver http://localhost/InnovatorServer InnovatorSolutions root C·Aras Office Connector 14 CD Image	Login	Release settings TargetRelease: OC14 Description: Aras Office Connector 14 Defa portslimports.mf	ult Preferences
Available for Select A	l Packages	Existing Packages i dynamic_model_t Extended Classific fixes hoops_converter MSO_Defaults MSO_References MSO_Standard	constructor_default ^	Type Merge Ignore Mode Fast Mode Thorough Mode

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 = OC14
 - 6. Description = Aras Office Connector 14 Default Preferences
 - 7. Manifest File Path = The manifest is found in the unzipped patch folder in \Aras Office Connector 14\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	14.0.1

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 Edge WebView2
- 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

The Add-In requires that Microsoft Edge WebView2 be installed on the client machine. Microsoft Edge WebView2 is used by Aras Office Connector to handle logins into Aras Innovator.

Note: If Microsoft Edge WebView2 is not installed on the client machine, the installation process will automatically download and install it.

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





Figure 10.

5. Accept the End-User License Agreement and click Next.

🛃 Aras Office Connector	Setup				_		\times
End-User License Ag	reement						
Please read the followin	g license agreem	ent carefully	1				S
ARAS INNOVATOR Last Updated Decem		AGREEN	IENT 8.0	0			^
IMPORTANT - READ							
BY INSTALLING, C SOFTWARE OR BY BEHALF OF YOURS WHOSE BEHALF YO PURCHASING THE AGREEMENT. YOU AUTHORITY TO BIN	PURCHASING SELF OR YOU DU ARE USIN SERVICES, TO D REPRESENT ND LICENSEE	THE SERV IR EMPLO IG THE LI BE BOU AND WA (AS DEFIN	ICES, YO YER O CENSED ND BY RRANT	OU HERE R OTHE SOFTW THE TE THAT YO	BY AG R ENT ARE A RMS (DU HA	REE, ON TTY ON AND/OF OF THIS IVE THE	
	Print	Ba	ack	Next		Can	cel

Figure 11.

- 6. 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 Office Connector\ Selecting the Install Office Connector for all users changes the default directory to C:\Program Files (x86)\Aras Innovator Microsoft Office Connector\

📸 Aras Office Connector Setup – 🗆 🗙
Destination Folder Click Next to install to the default folder or click Change to choose another.
Install Aras Office Connector to:
%LOCALAPPDATA%\Aras Office Connector\
Change
Install Office Connector for all users
Back Next Cancel

Figure 12.

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

🕼 Aras Office Connector Setup		_		×
Working Directory Working Directory Location				₽
Select Working directory				
C:\Users\test\Documents\OfficeConnector\ Change				
	Back Ne	ext	Cancel	

Figure 13.

Note: If choosing to use Microsoft OneDrive as the working directory, the option to **Use Office applications to sync Office files that I open** should be disabled as shown in the example here:

 Microsoft OneDrive 	Х
Settings Account Backup Network Office About	
File collaboration	
Work on Office files with other people at the same time by syncing the files with Office.	
Use Office applications to sync Office files that I open More info	
OK Canc	el

Figure 14.



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

	igure Server URLs	6
Add URI	Ls to preconfigured list	
reconfigured	l list of Server URLs:	
http://localho	ost/InnovatorServer	Add
		Remove
		Edit
		_
	Back Next	Cancel
	Figure 15.	
🚽 Aras Offi	ing Commenter Setur	
	ice Connector Setup —	
Preconfi	igure Server URLs Ls to preconfigured list	×
Preconfi Add URL	igure Server URLs Ls to preconfigured list	
Preconfi Add URL	igure Server URLs	S
Preconfi Add URL	igure Server URLs Ls to preconfigured list I list of Server URLs:	Add
Preconfi Add URL	igure Server URLs Ls to preconfigured list	S
Preconfi Add URL	igure Server URLs Ls to preconfigured list I list of Server URLs:	Add
Preconfi Add URL	igure Server URLs Ls to preconfigured list I list of Server URLs: URL Configuration	Add
Preconfi Add URL	igure Server URLs Ls to preconfigured list I list of Server URLs: URL Configuration Enter new Server URL :	Add
Add URL	igure Server URLs Ls to preconfigured list I list of Server URLs: URL Configuration Enter new Server URL : http://localhost/InnovatorServer	Add
Preconfi Add URL	igure Server URLs Ls to preconfigured list I list of Server URLs: URL Configuration Enter new Server URL : http://localhost/InnovatorServer	Add
Preconfi Add URL	igure Server URLs Ls to preconfigured list I list of Server URLs: URL Configuration Enter new Server URL : http://localhost/InnovatorServer	Add
Preconfi Add URL	igure Server URLs Ls to preconfigured list I list of Server URLs: URL Configuration Enter new Server URL : http://localhost/InnovatorServer	Add



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

9. 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.

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Aras Office Connector Setup		31 <u>—</u> 6	
Choose Setup Type			
Choose the setup type that best suits your	needs		B
Custom Allows users to choose which pr will be installed. Recommended			vhere they
Complete			
All program features will be inst	alled. Requires the	most disk space.	
	Back	Next	Cancel

Figure 17.

10. Once MS Office applications have been selected, click Install.

🛃 Aras Office Connector Setup			
Ready to install Aras Office	e Connector		Ð
Click Install to begin the installati settings. Click Cancel to exit the		change any of your i	nstallation
	Back	Install	Cancel

Figure 18.

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



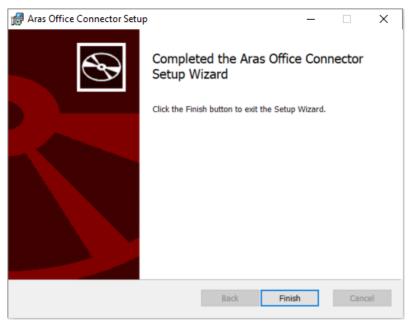


Figure 19.

12. If the client machine does not have Microsoft Edge WebView2 installed, the installer will automatically download and install it.

	-	×
Installing Microsoft Edge Webview2 Runtime		
Installing Microsoft Edge Webview2 Runtime		

Figure 20.

- 13. Open Microsoft Word.
- 14. Confirm that the Aras ribbon has been added to Microsoft Word.

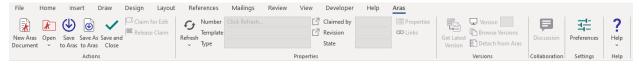


Figure 21.

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5 Post Installation

It is recommended that you review the *Aras Office Connector 14 – 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 14 - 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 <u>https://www.aras.com/help/office/14-0-1/</u>.



6 Upgrading from a Previous Version

6.1 Upgrading from version 12.0 of Aras Office Connector

Upgrades from Office Connector version 12 to version 14 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.

