Aras Office Connector 31

Installation Guide

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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.

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 31:

Aras Innovator 31

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:
 - o Release 31

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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.

- 4. Close the dialog.
- 5. From the TOC, select Administration\Variables.
- 6. Confirm that the following variable is listed:

Version Major	Version Minor	VersionServiceUpdate	VersionLabel
14	0	25	Release 31

2.3 Feature License Key

Aras Office Connector 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.
- 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 <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**.

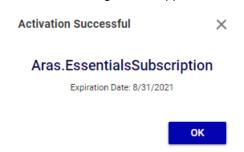
Activate Feature	×
Activation Key	
	Activate Cancel

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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 31
- 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.

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- 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.

5. 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.

🖌 Aras Update - Select components for installation	_		\times
			?
Aras Office Connector Release 31 (14.0.5) requires the following components f the components you intend to install.	or proper instal	lation. Sel	ect
Computer name: SYNAPSE/BLR1-LHP-N71195			
_			
Aras Innovator Office Connector			
Office Connector Import in Innovator Database			
Back Next		Cancel	

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

者 Aras Update		—	
			?
Enter the following parameters for each component you are g continue.	oing to install and the	en click Install	button to
 Aras Innovator Office Connector 			^
Server URL			
http://localhost/InnovatorServer]		
Database			
InnovatorSolutions v			
Username			
root			
Password			
••••••]		
Back	Install	Cane	cel

- 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.

7. 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 31 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

Import			- 🗆 🗙
Import Settings Ext About	Serveri		Login
Release settings Target Release: OC31	Description:	Aras Office Connector 31	
Manifest File Path: C:/Users\Italyeville#fathedD	ownloads\Aras.OC.14.0.5.2367limport	s\MS0_Standard_imports.mf	
Available for Import Select All Packages MSO Standard	Language codes	Existing Packages in the Database com.aras.innovator.solution.PImEffecti com.aras.innovator.str	Type Merge C Ignore
		com.aras.innovator.tgv.configuration com.aras.innovator.tgv.viewer com.aras.innovator.viewers com.aras.innovator.wm	Mode C Fast Mode @ Thorough Mode

- 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 = OC31
 - 6. Description = Aras Office Connector 31
 - 7. Manifest File Path = \Aras Office Connector 31\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.

t Settings Exit About				
Server: http://localhost/l	nnovatorServer/			Login
Release settings Target Release: C	0C31	Description: Ara	is Office Connector 31	
Path: C:\Users\ku			SO_StandardSettings_imports.mf	
vailable for Import	Languag	e codes	Existing Packages in the Database	

- 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 = OC31
 - 6. Description = Aras Office Connector 31
 - Manifest File Path = \Aras Office Connector 31\Imports\MSO_StandardSettings_imports.mf
 - 8. Available for Import = Check all packages
 - 9. Type = Merge
 - 10. Mode = Thorough Mode
- b. Click the Import button again.





3. After the import is completed, import the default Reference items.

port Settings Exit About			>
Innovator Server Server: http://localhost/InnovatorS	erver/		Login
Release settings Target Release: OC31	Description:	Aras Office Connector 31	
Manifest File Path: C:\Users\\Dc Available for Import	wnloads\Aras.OC.14.0.5.2367Jmpor	ts\MSO_References_imports.mf	

- 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 = OC31
 - 6. Description = Aras Office Connector 31
 - 7. Manifest File Path = Point to the MSO_Standard_imports.mf file
 - 8. Available for Import = MSO_Standard package is checked
 - 9. Type = Merge
 - 10. Mode = Thorough Mode
- b. Click the Import button again.



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

Import			- 0
oot Settings Exit About	ierver/		Login
Release settings			
Target Release: 0C31	Description:	Aras Office Connector 31	
Path: C:Users'k	Dwnloads\Aras.OC.14.0.5.2367\Defau	ItPreferences\Imports\imports.mf	
Select All Packages MSO Defaults	₩ en	com.aras.innovator.solution.PImEffecti com.aras.innovator.sovc com.aras.innovator.tdf com.aras.innovator.tgr.configuration	Type Merge Ignore Mode
		com.aras.innovator.tgv.viewer com.aras.innovator.viewers com.aras.innovator.wm Databaseldentifier	C Fast Mode

- 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 = OC31
 - 6. Description = Aras Office Connector 31
 - Manifest File Path = \Aras Office Connector 31\Optional\DefaultPreferences\Imports\imports.mf
 - 8. Available for Import = Check all packages
 - 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.

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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	14.0.5

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, 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)

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.

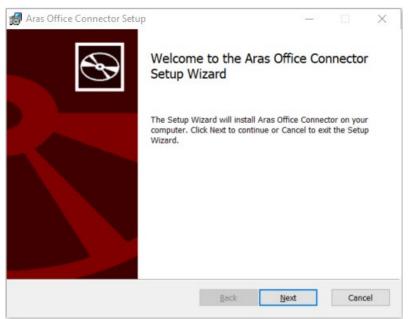
Note: If Microsoft Edge WebView2 is not installed on the client machine, the installation process will automatically download and install it.

- 1. Shut down all Office programs on the client PC:
- o Microsoft Outlook
- Microsoft Word
- Microsoft Excel
- Microsoft PowerPoint

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- o Microsoft Visio
- 2. Copy the ArasOfficeConnectorSetup.msi to the Client PC.
- 3. Run the ArasOfficeConnectorSetup.msi
- 4. Click Next.



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

Aras Office Connector Setup –		\times
End-User License Agreement		
Please read the following license agreement carefully		S -
ARAS INNOVATOR® CLICK THRU AGREEMENT 8.0		
Last Updated December 1, 2014		
IMPORTANT - READ CAREFULLY.		
BY INSTALLING, COPYING, OR OTHERWISE USING THE LICENSED SO OR BY PURCHASING THE SERVICES, YOU HEREBY AGREE, ON BEI YOURSELF OR YOUR EMPLOYER OR OTHER ENTITY ON WHOSE BEHA ARE USING THE LICENSED SOFTWARE AND/OR PURCHASING THE S TO BE BOUND BY THE TERMS OF THIS AGREEMENT. YOU REPRESE WARRANT THAT YOU HAVE THE AUTHORITY TO BIND LICENSEE (AS BELOW), WHETHER SUCH LICENSEE IS YOURSELF OR YOUR EMPLO OTHER ENTITY ON WHOSE BEHALF YOU ARE USING THE LICENSED SO	Half of Alf you Ervices Int and Defined Dyer of	=
I accept the terms in the License Agreement		
Print Back Next	Car	icel



- 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				<u>~</u>
Click Next to install to the default folder of	or click Change to choose a	nother.		3
Install Aras Office Connector to:				
C:\Users\\AppData\Local\Ar	as Office Connector\			
Change				
Install Office Connector for all users				
	Back Nex	. 1	Cano	

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

付 Aras Office Connector Setup				_		×
Working Directory						
Working Directory Location						S
Select Working directory						
C:\Users\test\Documents\OfficeConnector\						
Change						
	Bac	k 🗌	Next		Cano	cel

Note: If choosing to use Microsoft OneDrive as the working directory, the **"File Collaboration"** option should be disabled as shown in the example here:

OneDrive Settings				
	Pause syncing when this device is in battery save	er mode	Off 💽	
C Sync and backup				
S Account	Pause syncing when this device is on a metered	network	On 💽	
Q Notifications				
 About 	Advanced settings			
	File collaboration Work on Office files with other people at the same time files with Office. Learn more	by syncing the	Off ●	
	Files On-Demand Save space on your device and download files from the o them. Learn more	cloud as you use	Off ●	
	Limit download rate	Off ●) ~	
99.3 GB used of 5 TB (3%)	Limit upload rate	Off ●) ~	
Get the OneDrive mobile app				

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

1000	as Office Connector Setur						×	1
Dest	configure Commenting	<i>c</i>						
	configure Server URL dd URLs to preconfigured list						\odot	
	uu orces to precorrigureu iist	•				_	\smile	
Precon	figured list of Server URLs:							
http://	localhost/InnovatorServer						Add	
						Re	move	
							Edit	
							Euit	
								-
						-		
	as Office Connector Setur		Back	Ne	XI.		×	
Pre	configure Server URL add URLs to preconfigured list	s	Back	Ne				
Pre	configure Server URL	s	Back	Ne			×	
Pre	configure Server URL add URLs to preconfigured list figured list of Server URLs:	s	Back					
Pre	configure Server URL add URLs to preconfigured list	s	Back	×			×	
Pre	configure Server URL dd URLs to preconfigured list figured list of Server URLs:	s t ration URL :	Back			Re	×	
Pre	configure Server URL dd URLs to preconfigured list figured list of Server URLs:	s t ration URL :	Back			Re	× Add	
Pre	configure Server URL dd URLs to preconfigured list figured list of Server URLs:	s t ration URL :				Re	× Add	
Pre	configure Server URL dd URLs to preconfigured list figured list of Server URLs:	s ration URL : inovatorServer		×		Re	× Add	
Pre	configure Server URL dd URLs to preconfigured list figured list of Server URLs:	s ration URL : inovatorServer		×		Re	× Add	
Pre	configure Server URL dd URLs to preconfigured list figured list of Server URLs:	s ration URL : inovatorServer		×		Re	× Add	
Pre	configure Server URL dd URLs to preconfigured list figured list of Server URLs:	s ration URL : inovatorServer		×		Re	X Add Edit	



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.

🕼 Aras Office Connector Setup			_		×
Choose Setup Type Choose the setup type that best suits your ne	eds				8
Custom Allows users to choose which prog will be installed. Recommended fo Complete			and w	here they	
All program features will be install	ed. Requires the	most disk sp	ace.		
	Back	Next		Can	cel

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

Aras Office Connector Setup			—		×
Ready to install Aras Office Connector	r				S
Click Install to begin the installation. Click Back settings. Click Cancel to exit the wizard.	to review	or change any	y of your i	nstallation	I
				7)	
Ba	ick	Install		Can	cel



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

👷 Aras Office Connector Setu)	8 -		×
Ð	Completed the Aras Offic Setup Wizard	e Con	nector	
	Click the Finish button to exit the Setup	Wizard.		
	Back Fini	sh	Cano	el

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		

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





5 Post Installation

It is recommended that you review the *Aras Office Connector 31 – 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 31 - 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/14-0-5</u>.

6 Upgrading from a Previous Version

6.1 Upgrading from version 12 of Aras Office Connector

Upgrades from Office Connector version 12 to version 31 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 14 of Aras Office Connector

The files necessary to upgrade Aras Office Connector 14 to version 31 are available in the 14.0.4 CD image, inside the **Aras Office Connector 31 Upgrade Patch.zip** file. For upgrade instructions, please refer to the *Aras Office Connector 31 - Upgrading from Version 14* guide.

