

Aras Office Connector

Release 31

User Guide

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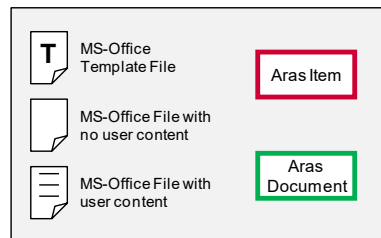
1 Overview

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, Microsoft PowerPoint for product briefings, and Microsoft Visio for product development flowcharts. Microsoft Outlook is used for emails containing vital product and project information.

Aras Office Connector provides a convenient way to manage Microsoft Office documents in Aras, directly from the user interface of the Office applications. The Connector helps to 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.

2 Use Case Overview

Aras Office 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.



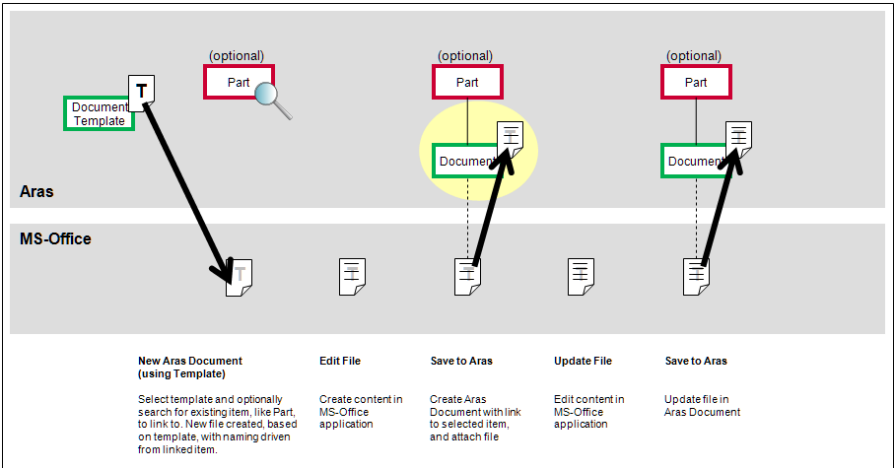
Note: The “Aras Document” represents any type of item that is used to manage Office files in Aras Innovator.

2.1 Create a New Document Using a Template

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

- Word, Excel, PowerPoint, and Visio.
- A template file provides a starting point for document creation.
- A File Name and Aras Document Number are automatically generated based on your company's process.

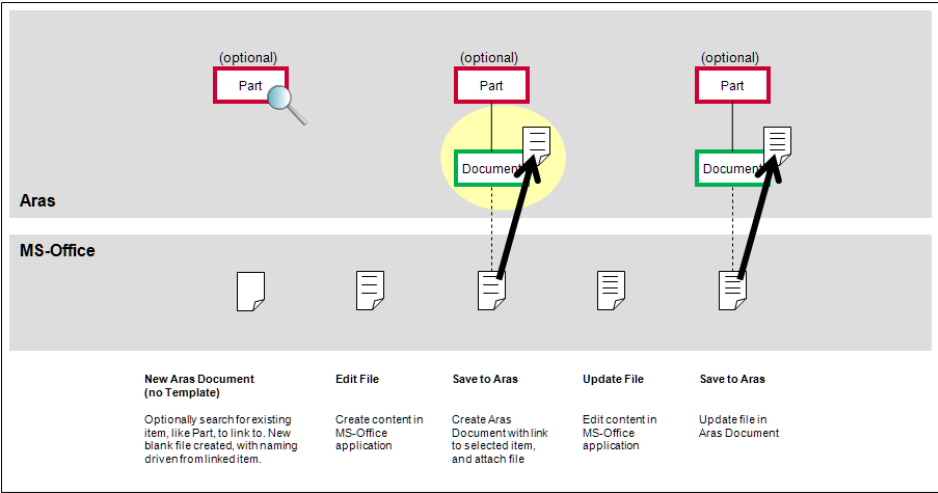
- Optionally you may select an existing Aras item to link to, such as a Part or Project. If selected, this linked item can also help drive the File Name and Document Number.



2.2 Create a New Document Without a 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. It is just blank. The following capabilities are supported by this use case:

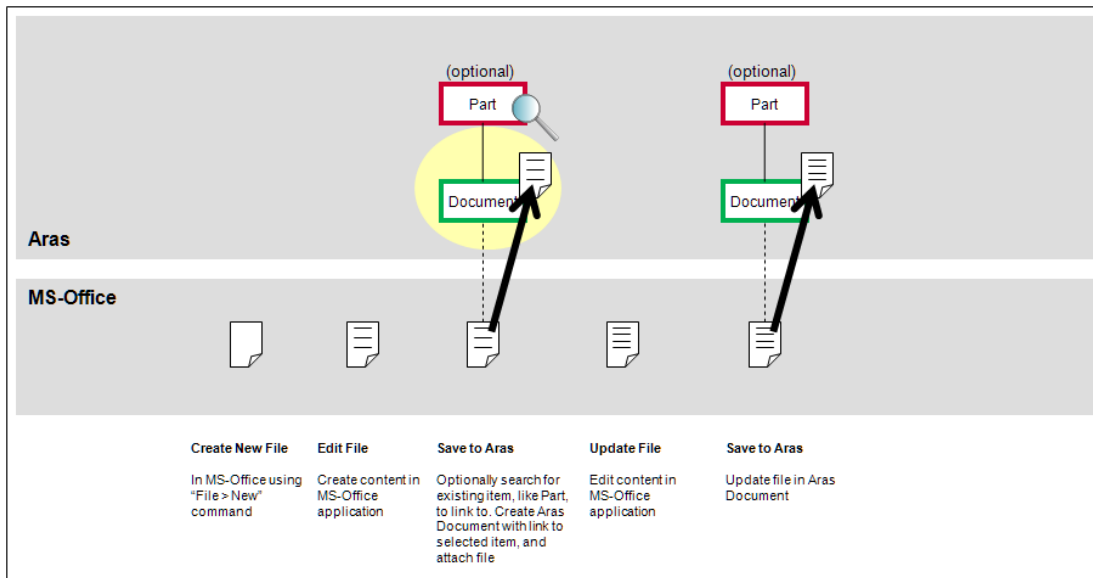
- Word, Excel, PowerPoint, and Visio.
- File Name and Aras Document Number are automatically generated based on your company's process.
- Optionally you may select an existing Aras item to link to, such as a Part or Project. If selected, this linked item can also help drive the File Name and Document Number.



2.3 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, PowerPoint, and Visio.
- An Aras Document Number is automatically generated based on your company's process.
- The file may be renamed based on your company's process.
- Optionally you may select an existing Aras item to link to, such as a Part or Project. If selected, this linked item can also help drive the File Name and Document Number.

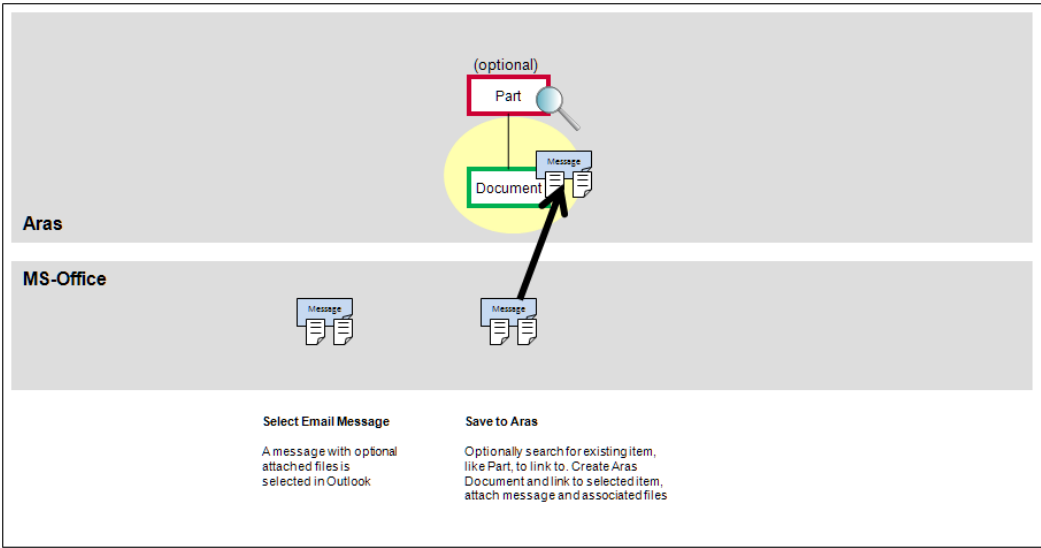


2.4 Save Outlook Email

The save process is different for an Outlook email message since it is not a document that undergoes any editing. It is just a one-time save into Aras. The following capabilities are supported by this use case:

- Outlook.
- An Aras Document Number is automatically generated based on your company's process.

- Optionally you may select an existing Aras item to link to, such as a Part or Project. If selected, this linked item can also help drive the Document Number.

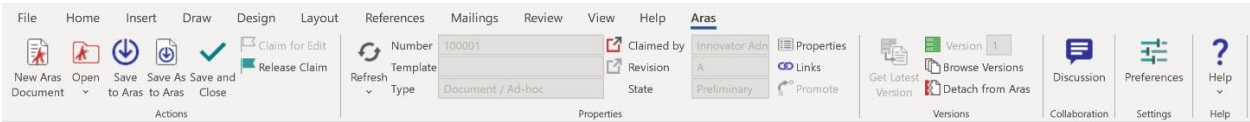


3 Aras Office Connector Basic Operation

This section gives an overview of the available Connector commands and other basic information.

3.1 Aras Ribbon and Commands















When the Aras Office Connector is installed on your local computer, it adds an Aras ribbon within the Word, Excel, PowerPoint, and Visio applications:











Note: The names of the commands in the ribbon are configurable by your administrator and may be different from the standard names shown here.

Section	Command or Field Name	Icon	Description
Actions	New Aras Document		Creates a new Office file that is managed by Aras, optionally using a template stored in Aras.
	Open		Opens an Office file managed by Aras in the Office application, by searching directly for a document.
	Open from Linked Item		Opens an Office file managed by Aras in the Office application, by searching on the linked item, such as Part or Project.

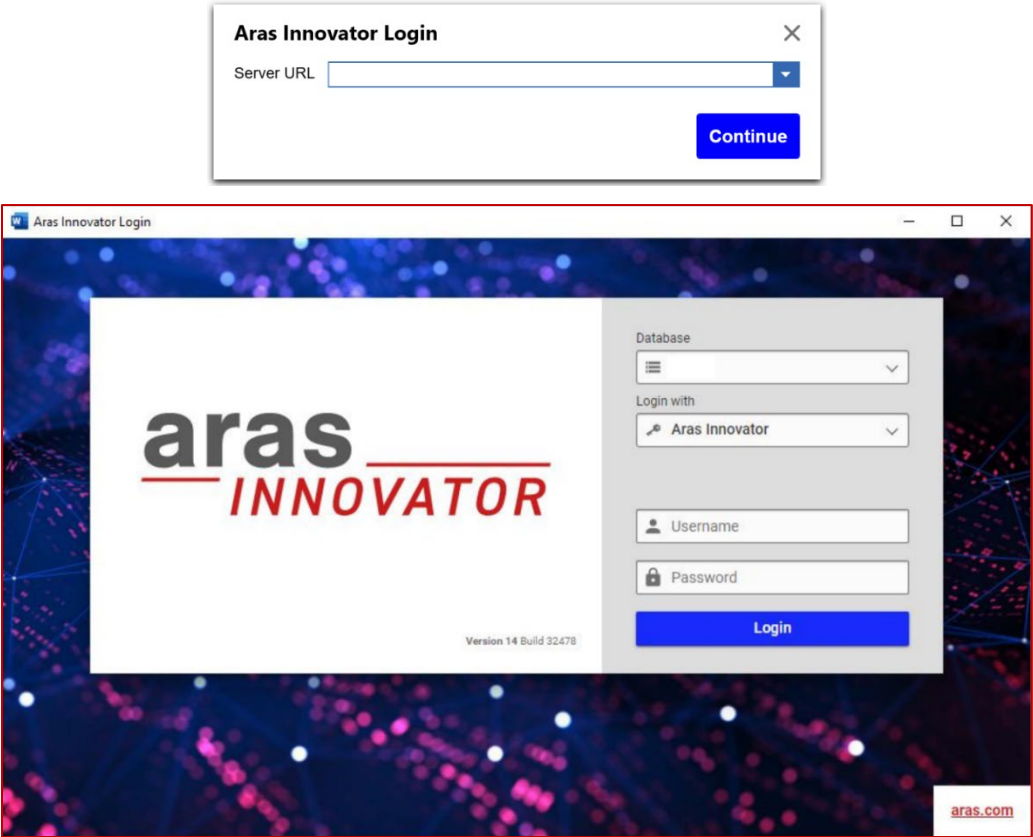


Section	Command or Field Name	Icon	Description
	Save to Aras		Saves the current Office file in Aras and retains the edit claim.
	Save As to Aras		Saves the current Office file as a new Office file managed by Aras.
	Save and Close		Saves the current Office file in Aras, removes the edit claim, and closes it from the session.
	Viewable		Enables selecting whether a viewable will be created during the save process (Optional).
	Claim for Edit		Sets the edit claim on the current Office file.
	Release Claim		Removes the edit claim on the current Office file.
Properties	Refresh		Refreshes all ribbon information from Aras.
	Refresh Settings		Refreshes new settings and properties from Aras.
	Number		The Aras Document Number used to manage the current Office file.
	Show Document		Aras Document form opens in the Aras web client.
	Template		The Aras Document template used to create the current Office file.
	Show Template		Aras Document form of the template opens in the Aras web client.
	Type		The Aras Document Type used to manage the current Office file.
	Claimed by		Shows who has the Aras Document claimed.
	Revision		The revision of the Aras Document used to manage the current Office file.
	State		The state of the Aras Document used to manage the current Office file.
	Properties		Displays a list of all file synchronized properties.
	Links		Opens a dialog to enable you to add or remove links to other Aras items.
	Promote		Promotes the current Aras Document to a new lifecycle state (optional).
Versions	Get Latest Version		If an earlier version is active, this will open the latest version.
	Version		Version of the Aras Document for the current Office file. ("Generation" in the Aras web client)

Section	Command or Field Name	Icon	Description
	Browse Versions		Allows you to open an earlier saved version of the file. Comparing versions is possible in MS Word.
	Detach from Aras		Removes the Aras tracking information from the current Office file.
Collaboration	Discussion		Accesses the Discussion Panel where you can add and send comments.
Settings	Preferences		Accesses the Preferences dialog where you can manage user settings for logging in, searching, and opening Documents.
Help	Help		Displays help information about using the Aras Office Connector.
	Session		Displays session information and allows you to log out of Aras.
	About		Displays information about the Aras Office Connector.
	Log out		Logs the user out of the Aras Office Connector.

3.2 Logging in to Aras

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



You can either enter the URL for connecting to Aras Innovator manually or you can store it as a dropdown selection. The URL connections for the dropdown selection are stored under the **Preferences** button in the Aras Ribbon:



Preferences



Stored list of Server URLs:

http://localhost/InnovatorServer1
http://localhost/InnovatorServer2
http://localhost/InnovatorServer3
http://localhost/InnovatorServer4
http://localhost/InnovatorServer5

Add

Remove

Edit

- Show Virtual Saved Searches
- Bypass property synchronization warning
- Show last search criteria

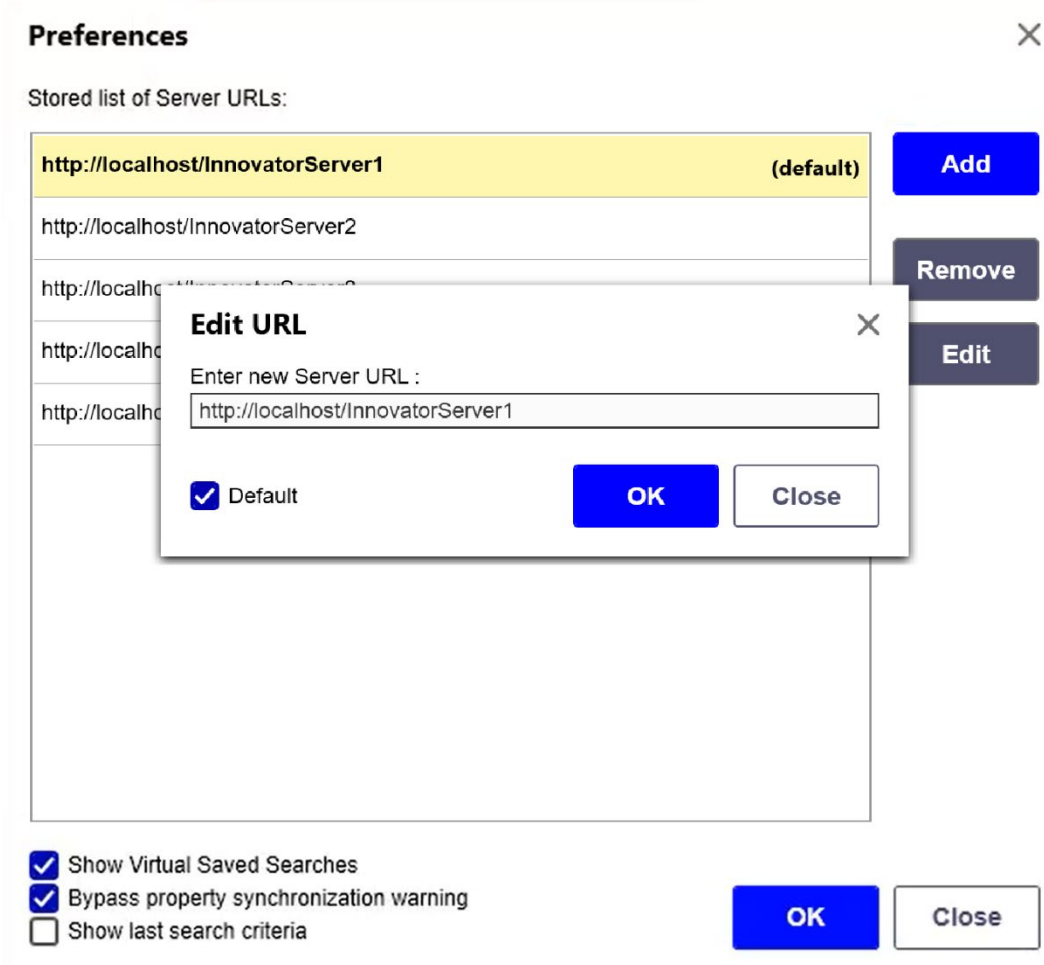
OK

Close

A default server URL can be configured to bypass the first login screen by highlighting the URL, selecting **Edit**, and enabling **Default**. The user can later disable the default login server URL, which will enable the first login screen. A different server URL can also be later selected as the default URL. Only one URL can be configured as Default, so any previously set URL will be disabled when a new URL is set as Default.

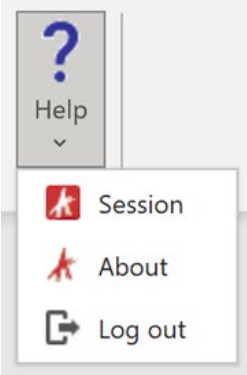


A default server URL can also be configured during installation.

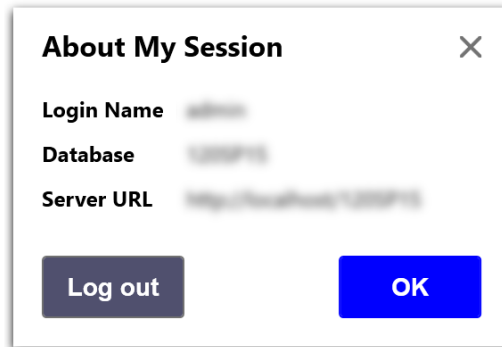


Once you enter the appropriate values and click **Login**, you will be able to use the Connector functions. A separate login to Aras is required for each Office application. You will stay logged in to Aras if the Office application is active. After a period of inactivity, you will automatically be prompted to re-login by entering your password.

You can log out of Aras by clicking the down arrow in the Help section and selecting **Log out**:



You can also log out of Aras through the Help section by selecting **Session** and clicking **Log out**:



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

3.3 Help

Clicking the **Help** button brings up the Aras Office Connector documentation in your web browser. You will not be able to use this function if you are offline.

3.4 Local File Management

Files managed by the Aras Office Connector are kept locally in a working directory, which is created at the time that the Connector is installed on your desktop. The default location is

C:\Users\<username>\Documents\OfficeConnector but may be set to a different location by your administrator.

The Aras Office Connector does not affect your ability to use the normal Office **Save** and **Open** commands. Even when you are managing your files in Aras, you can still save and open them locally.

3.5 Aras Item Types used by the Aras Office Connector

Aras Innovator manages data using several different “Item Types.” Items can be things like Parts, Projects, Process Plans, etc. The type of item used by Aras to manage files is referred to generically as a “Document” but could have a different name in your environment. An Aras Document should be thought of as 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 Connector, you will have only 1 or 2 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). However, when saving Outlook e-mails to Aras, there will be one file for the message body, any number of other files which are the attachments from the e-mail, and an optional viewable file (such as .pdf) of the message body.

4 Creating and Saving Documents

As shown in the [Use Case Overview](#) in section 2, there are several different ways that you can use the Aras Office Connector to create and save documents. This section describes the procedures associated with these different use cases.


4.1 Creating a New Aras Document

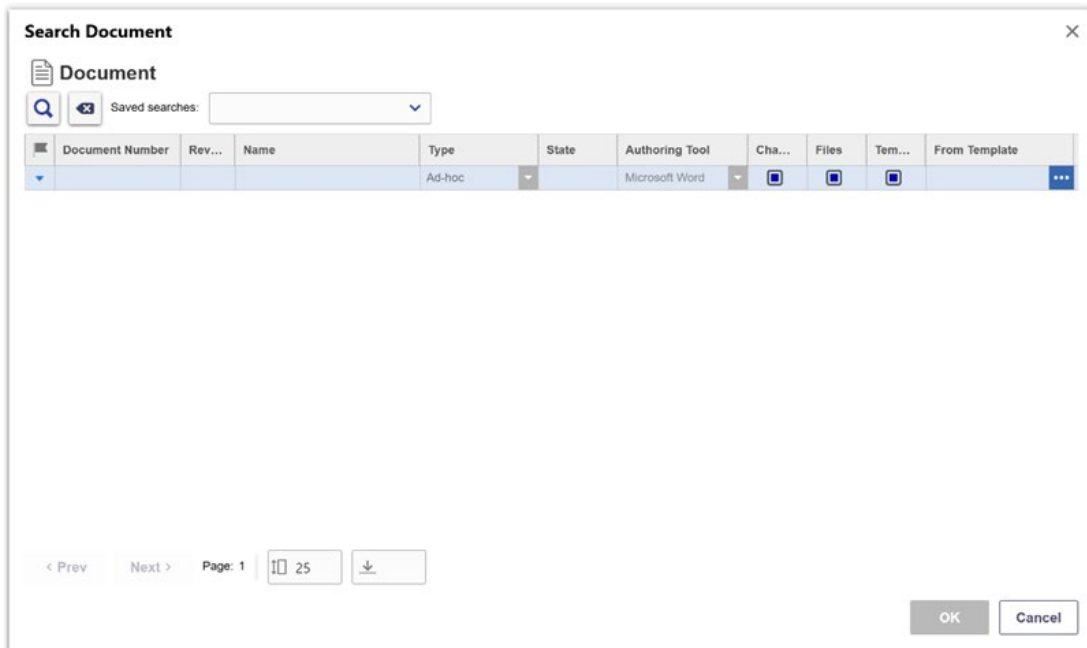
Creating a new Aras Document allows you to create a new Office file while making use of company-standard processes such as templates and numbering.

To create a new Aras Document:

1. Click the **New Aras Document** button in the Aras ribbon. This opens the **New Aras Document** dialog.

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. The Document Types available to you are set by your administrator. 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 you are working on. The following is an example of the selection list for **Document Type**:

- Click the browse button  in the Document Template field to search for a template to apply to your document. The following is an example of the search dialog:



The entries in the list show the available templates in Aras that correspond to your selected Document Type. You can perform additional search filtering by entering values in the blue search bar.

Templates need to be defined prior to using **New Aras Document**, and may be defined by the administrator or by other users. Refer to section 8.1 [Creating Document Templates](#) for details on creating templates.

Note: The administrator can define specific Document Types to *require* the use of a template. If this is the case, you will not be able to exit the dialog without selecting a template.

- **Link to**

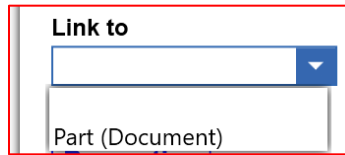
Based on the selection of **Document Type**, the selection list for **Link to** shows the available Aras ItemTypes that can be linked to your document. For example, you will be able to link a “Product” Document only to Parts, and a “Project” Document to Projects and Activities.


Links are also known as Relationships in Aras terminology. The advantage of creating them at the time of document creation is that the item you link to can drive numbering.

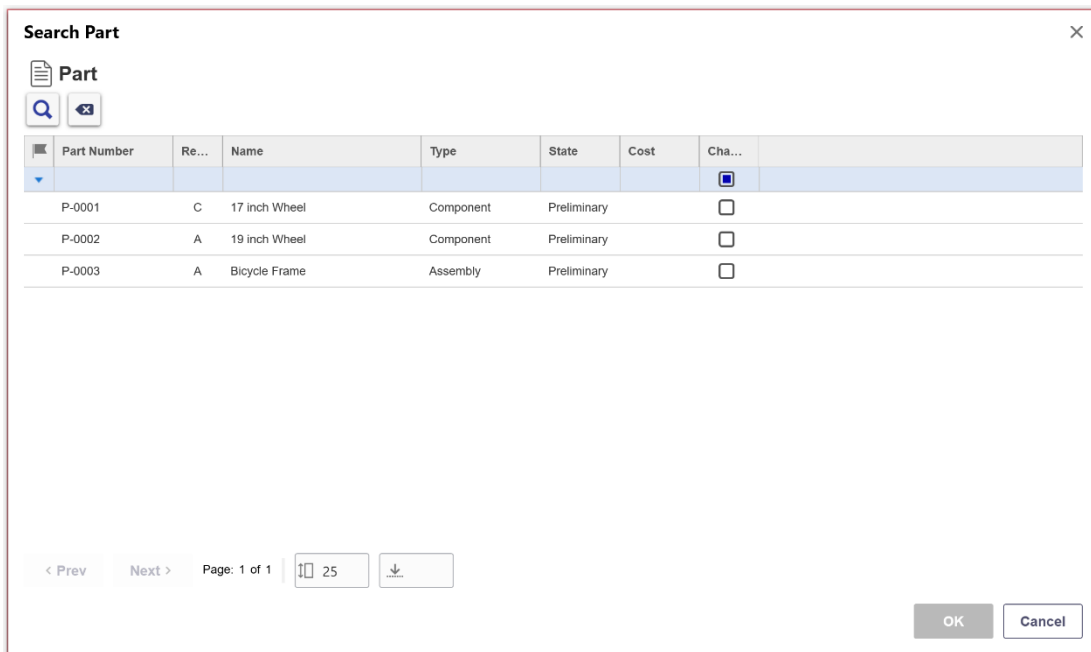
For example, if you are creating a Product Document and linking it to Part P12345, then the File Name could be automatically set to something like “P12345-DOC-1.docx”.

Note: Your administrator can set “Link to” as required for a given Document Type, meaning you will have to select a linked item before proceeding.

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



Once you select the item type to link to click the browse button  to open a search dialog to select the specific item in Aras:



Capabilities within this Search dialog include:

- Entering search criteria in the top search row (standard Aras simple search).
- Executing a search with the **Run Search** button.
- Clearing search criteria with the **Clear Search Criteria** button.
- Selecting an existing Aras Saved Search from the list.
- Setting the page size for returned results.
- Paging up and down within multiple pages of results.
- Column sorting by clicking on a column header.

Once you have located the desired item, select it and click **OK**. It will appear in the main dialog as the "Link to" item.

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

o **Title and other Properties**

Enter a title for your document, and optionally any other Properties that may be configured in your environment.

Note: 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 here in the **Properties** dialog reflect the Office naming.

Properties may be defined in Aras by your administrator as “required”, and any such properties will be indicated to you with a blue background. You will not be able to continue with the creation of your new document until you enter all required properties. Properties can also have default values pre-defined by your administrator in Aras. If so, you will see the values appear automatically, but then you can change them if you like.

Note: The appearance of the blue required properties as well as any default values does not occur until you first select a Document Type.

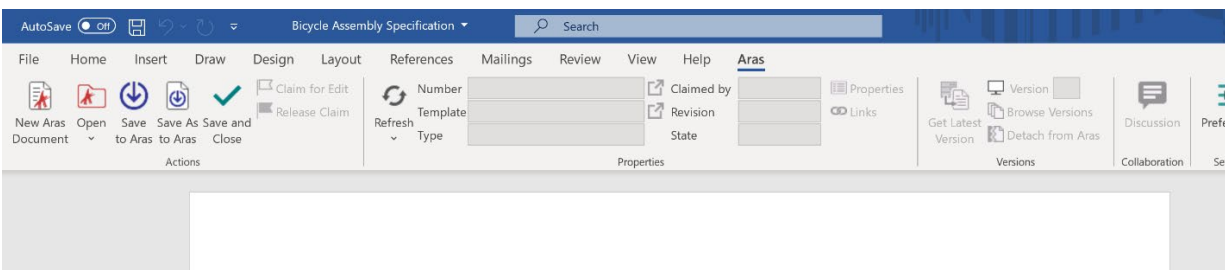
When you complete any property entry, click **OK** to exit the Properties dialog.

- Click **OK** in the main dialog to complete the process.

The connector automatically creates a new open file within the Office application. This file is saved locally in the connector's working directory, using the File Name automatically determined by the connector. If you are using a template, the initial content of the file comes from the template file, otherwise it will be blank.

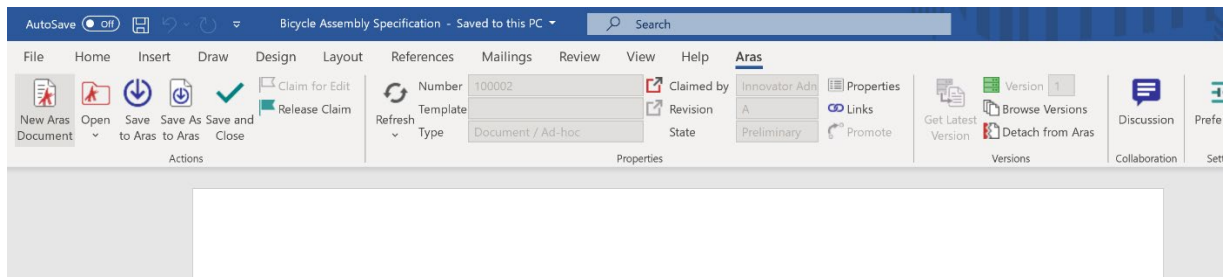
Note: The Aras Office Connector populates a property on the Document based on the Microsoft Application that authored the file. By default, this is the **Authoring Tool** property. Your administrator may configure the Aras Office Connector to use a different property for this value. For the purposes of the *Aras Office Connector 31 – 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 locally. Since the file has not yet been stored to Aras, values are not displayed for the Aras Document properties. If you have these properties imbedded in your document (such as in the file header below) they will not be updated yet.



At this point, you will be able to make edits to the file.

- To complete the process of saving the file into Aras, click the **Save to Aras** button. You can now see that the properties are updated because the file is saved into Aras.



If the Document is in Aras Innovator, you see the Form as shown here:

The screenshot displays the Aras Office Connector interface for document management. At the top, there is a document ID '100002' and a toolbar with 'Edit' and 'Open in Office' buttons. Below this is a 'Document' form with the following fields:

- Document Number: 100002
- Revision: A
- State: Preliminary
- Assigned Creator: [Empty]
- Name: Bicycle Frame Assembly Specification
- Designated User: [Empty]
- Type: Ad-hoc
- Authoring Tool: Microsoft Word
- Version: [Empty]
- Effective Date: [Empty]
- Description: [Empty]
- From Template: [Empty]
- Files Attached:
- Changes Pending:
- Template:

Below the form is a 'Files Changes' section with a table of related files:

Related File [...]	File Type [...]	Comments	Sequ... ↑	Is Shared
Bicycle.E...	Microsoft Word		1	<input checked="" type="checkbox"/>

At the bottom, there is a pagination control showing 'Page: 1 of 1' and '1 Results'.

4.1.1 Manual File Naming Option

Depending on the **Document Type** selected, you can manually enter a File Name for the new file. This option is set by the administrator. Typically, this will be for document types like “Ad-hoc” which don’t need to be highly controlled. When this option is enabled, the **File Name** field will appear in the dialog. After clicking **OK** the file is created with the File Name you entered.

4.1.2 Filtering by Link To selection

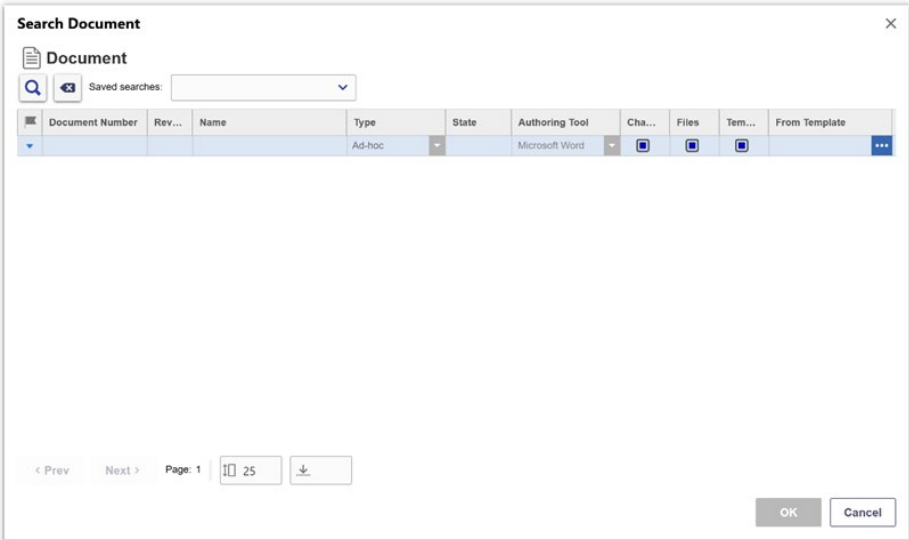
If there are many Document Types in your Aras environment, one way to find the desired type quickly is to first select the **Link to** the item type. This automatically filters the Document Type list to those types that are valid for the selected item type.

4.1.3 Attaching an Office File to an Existing Aras Innovator Document

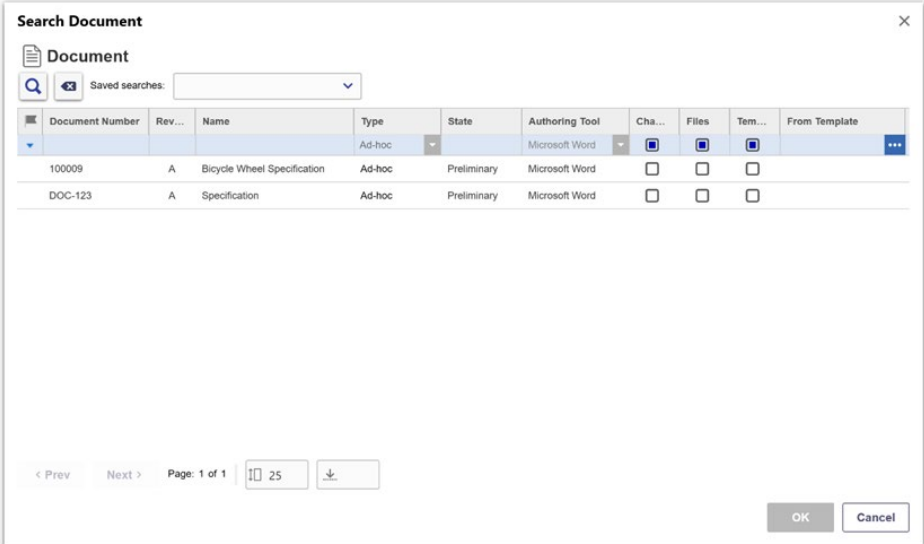
Note: The administrator must enable the Allow Select Existing Document checkbox on the appropriate Office Document Type before you can use this feature.

To attach a file to an existing Aras Innovator document, first create a New Aras Document, as described in Section 4.1. Before selecting **OK**, use the following steps:

1. Click the  next to the **Document Number** field. The Search dialog box appears.



2. Click the **Search** button to see a list of existing documents that do not contain an attached file.



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

New Aras Document

Document Type: Document / Ad-hoc

Title: Specification

Document Template: [Empty]

File Name: [Empty]

Link to: [Empty]

Document Number: DOC-123

Buttons: Properties, OK, Cancel

4.2 Saving an Existing Document to Aras

If you have an existing Office file, you can still save it to Aras, but the options will be slightly different from creating it in Aras to begin with. To save an existing file to Aras, simply open it in the Office application and click **Save to Aras**. After saving to Aras, you will see the Aras ribbon updated.

Save to Aras

Document Type: Document / Ad-hoc

Title: [Empty]

Document Template: [Empty]

File Name: [Empty]

Link to: [Empty]

Document Number: auto-generated

Buttons: Properties, OK, Cancel

Behaviors compared to creating a new document are:

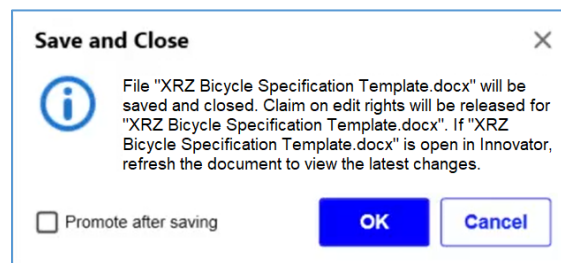
- **Document Type** - Only those Document Types not requiring a template will be shown, since it is not possible to use a template for an existing file.
- **Document Template** - Not selectable, since the file already exists.
- **Link to** - You can select any item to link to, based on valid item types for your 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 just use the existing File Name.

4.3 Update Save

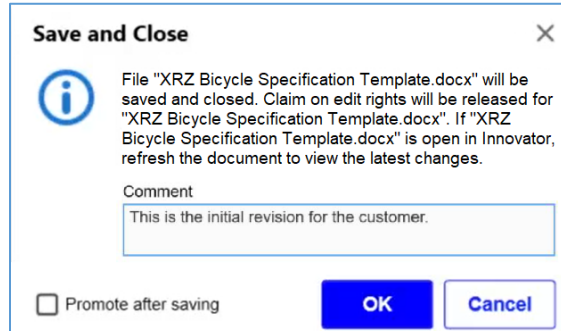
As described in the previous sections, the behavior of the **Save to Aras** command changes depending on the state of your current file. If you just created a new file using **New Aras Document**, clicking on **Save to Aras** creates the Aras Document and attaches the file to it. If you are saving an existing file, the **Save to Aras** command opens the dialog to enable you to define the various options. You can then create the Aras Document and attach the file. Once you have done either of these to start working on an Office file managed in Aras, you can continue to use **Save to Aras** to update the file. No prompts will appear, like when you use the normal Office **Save** command after the initial save. This is referred to as an "Update Save." Use it to make sure the latest file is available in Aras.

4.4 Save and Close

The Aras Office Connector includes a special save command called **Save and Close** which simply indicates that you have finished working on a particular file and you want to pass the control back to Aras. When you use this command, you see the following dialog:



There are two options that your administrator can enable for this dialog: **Comment** and **Promote after saving**:



If the **Comment** option is enabled, you can write a comment in the **Comment** text box, which is saved in Aras for this specific version of the document.

If the **Promote after saving** option is enabled, you will see a checkbox, which is set to on by default. If you click **OK** and the Document is saved in Aras, you will see an additional Promote dialog, which allows you to promote the just-saved Document to a new state. See section [7.7](#) for details.

To understand the full capabilities of Save and Close, it is best to compare it to Update Save in section [0](#).

Behavior	Save to Aras	Save and Close
File saved to Aras	Yes	Yes
Reservation Claim	Claim is kept ON (claimed)	Claim is set OFF (unclaimed)
File in session?	File is kept in active Office session	File is closed from active Office session
Viewable creation (PDF, etc.)	Option 1: Viewable created Option 2: No viewable created Option 3: Viewable created if selected by user Option 4: Viewable created if selected by user	Option 1: Viewable created Option 2: Viewable created Option 3: Viewable created if selected by user Option 4: Viewable created
Remove local file	No	Optional (set by administrator)
Version comment	No	Optional (only if enabled for the Document Type)
Promote to state	No	Optional (only if enabled for the Document Type)

Note: The options described above are defined by the administrator and are not user selectable. Use **Save to Aras** (Update Save) when you intend to keep working on a file. Use **Save and Close** when you have finished working on it. You can always open the file again from Aras, after you use **Save and Close**.

If your administrator selected Option 3 or 4 for viewable creation, the Viewable checkbox is enabled in the Aras Ribbon. This means that you can decide whether to save a viewable on the next save. If your administrator selected Option 1 or 2, the checkbox does not appear because the process is pre-defined.

4.5 Save As to Aras

Use the **Save As to Aras** 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 your current Office file is already saved to Aras. When you use **Save As to Aras** you will get the same dialog as when saving a new file, but with different available options:

Behaviors compared to creating a new document are:

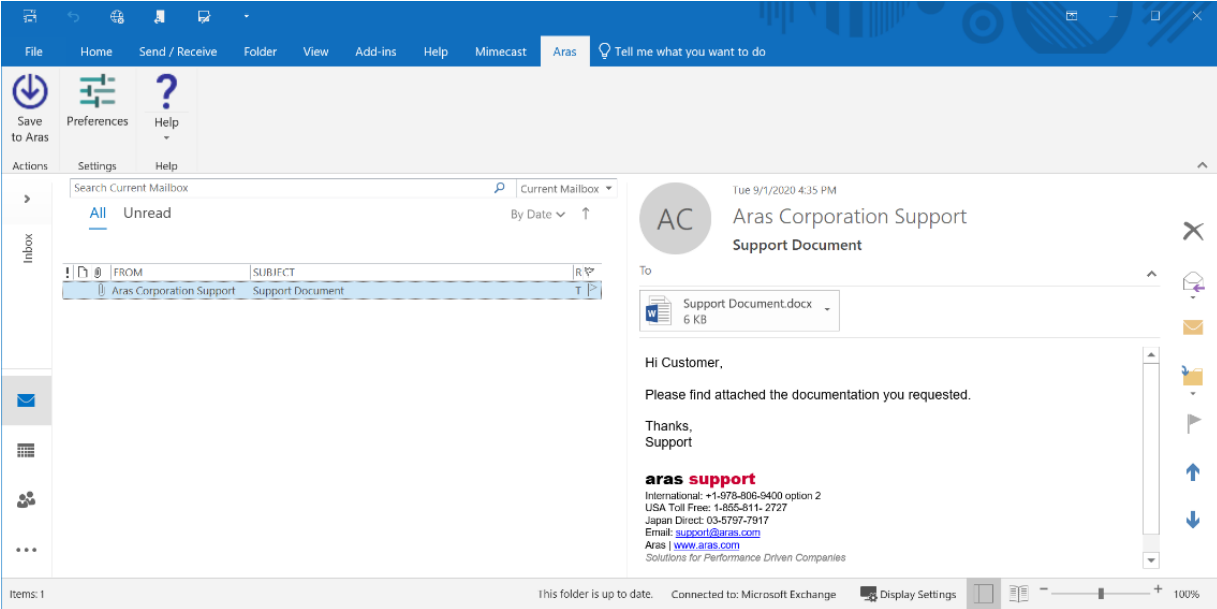
- **Document Type** - The Document Type of the original document appears. If this original Document Type requires a template, it cannot be changed. If it does not require a template, it can be changed.
- **Document Template** - The Document Template, if any, is displayed but cannot be changed, since the file exists already.
- **Link to** - You can select any item 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 you can edit them if desired.
- **File Naming** - The File Name field will appear only if the Document Type does not automatically rename the file. In this case, you can enter a File Name for the new file. Otherwise, the renaming logic for the specific Document Type will be used.

5 Saving E-mail Messages

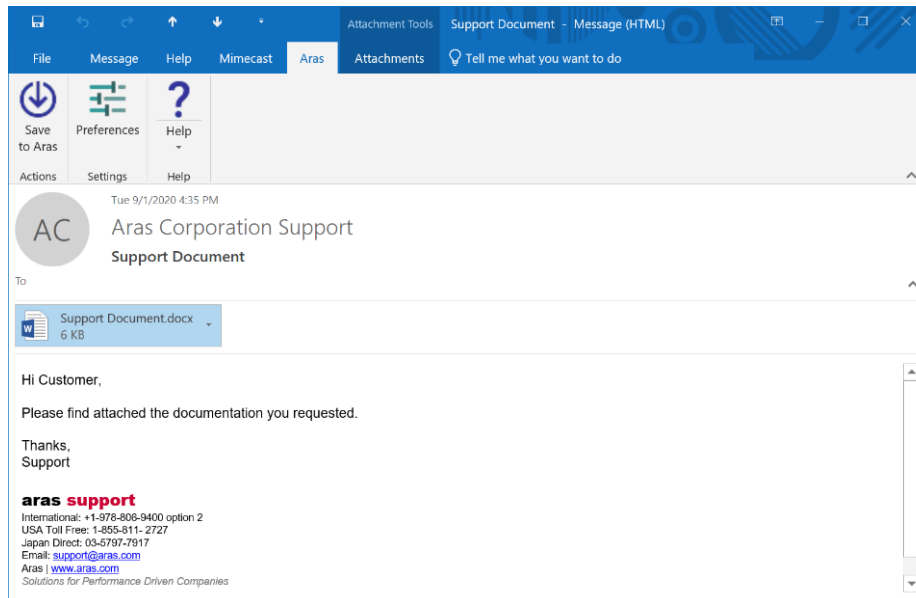
This section describes how to save Outlook email messages. As described in section [2.4](#), the save process is different for an Outlook email message, since it is a document that is not subject to editing.

5.1 Saving E-mail Messages from Outlook

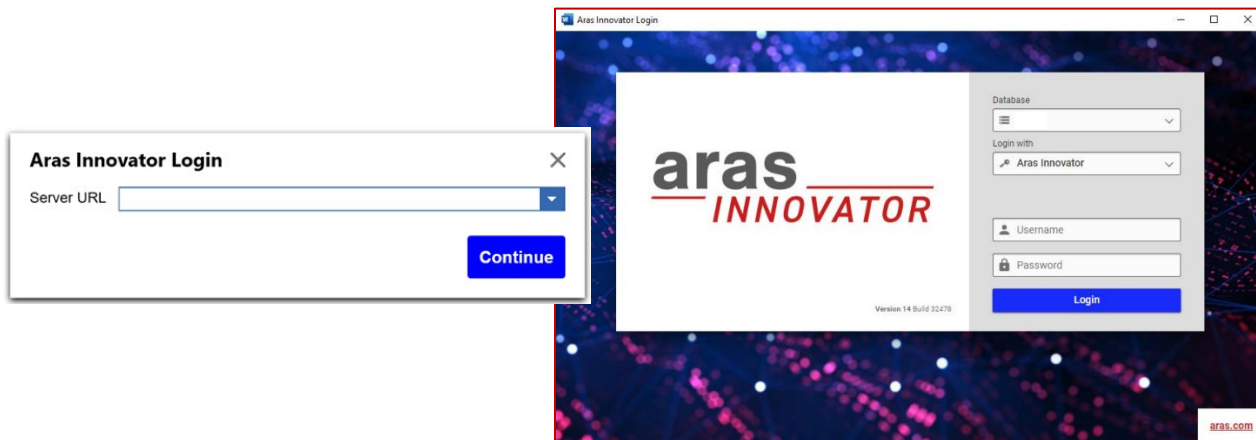
From within Outlook, it is possible to save an email message from any folder (Inbox, Sent, etc.) to Aras using the **Save to Aras** command. You can do this from either the main Outlook window or when the message is open in its own window. From the main window, select the desired message and select **Save to Aras** from the Aras ribbon, or right-click and select **Save to Aras**.



If you have the message open in its own window, use the **Save to Aras** command in the Aras ribbon.



The Aras Innovator Login dialog boxes appear.



Enter the password and click **Login**.

Note: If you select an email in your Inbox list but do not open it, the Login dialog box does not appear.

A reduced version of the **Save to Aras** dialog then appears. Select the **Document Type**, an optional **Link to** the item, and enter a **Description** of the email.

Click the **Properties** button to view details about the email:

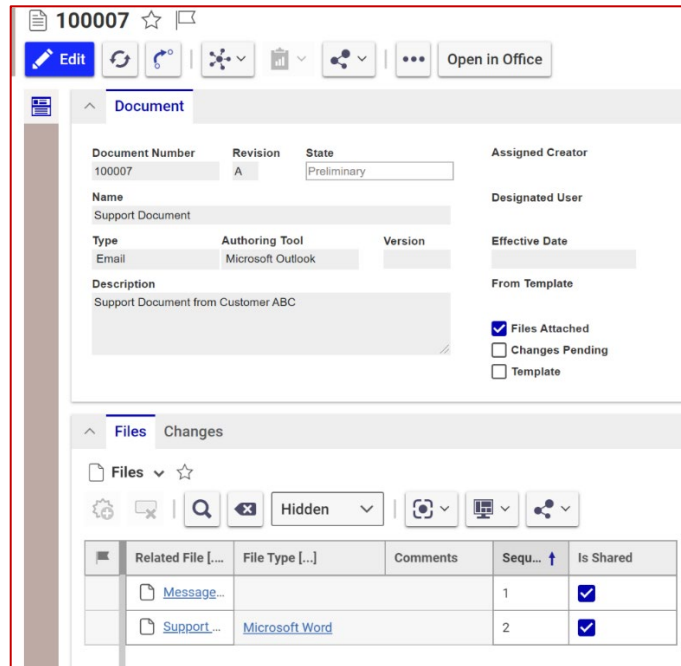
Property	Value
Subject	Support Document

The save process creates an Aras Document using the numbering convention established for the selected Document Type. Information from the email message is stored in the Aras Document as follows by default, or may be modified by your administrator:

- The body of the message is stored as a file called “Message.msg.”
- The body of the message can be optionally stored as a PDF viewable file called “Message.pdf” as well (if configured by your administrator).
- File attachments from the message, if any, are stored with their existing names.
- The Description you enter in the dialog is stored in the Description field in Aras.
- Properties from the email message including Subject, From, To, Cc, and Date may be mapped into Aras.
- If enabled by your administrator, the body of the message can also be displayed in a Message property directly within the header area of the Document form.

The option of displaying the message body in the form allows the message to be read directly but may not display some complex message formatting exactly as shown in Outlook. The Message.msg file preserves the content exactly and can be viewed by clicking on the file hyperlink. Other attached files can be viewed from Aras by clicking on their hyperlinks.

Note: MS-Office files attached to emails can be opened from Aras into their proper Office application but are not managed for editing purposes as described in section 4.

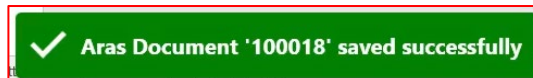


Saving an Outlook email message to Aras is a one-time operation, so there is no connection established between the message in Outlook and the resulting Document in Aras. If you save the same email message to Aras a second time, it creates a second Document.

5.2 Save Successful Message

After saving to Aras, the connector displays a small pop-up message in the lower-left corner of the Office application. This message appears for Outlook as well as the other Office applications but is particularly useful for Outlook because it is how you find out the Document Number associated with the saved email message. If you click on the pop-up message, it opens the form of the Document in Aras (Internet Explorer only).

This works in Word, Excel, PowerPoint, and Visio as well, but in those applications the Document Number appears in the ribbon. In Outlook, this is the only place that this information appears.

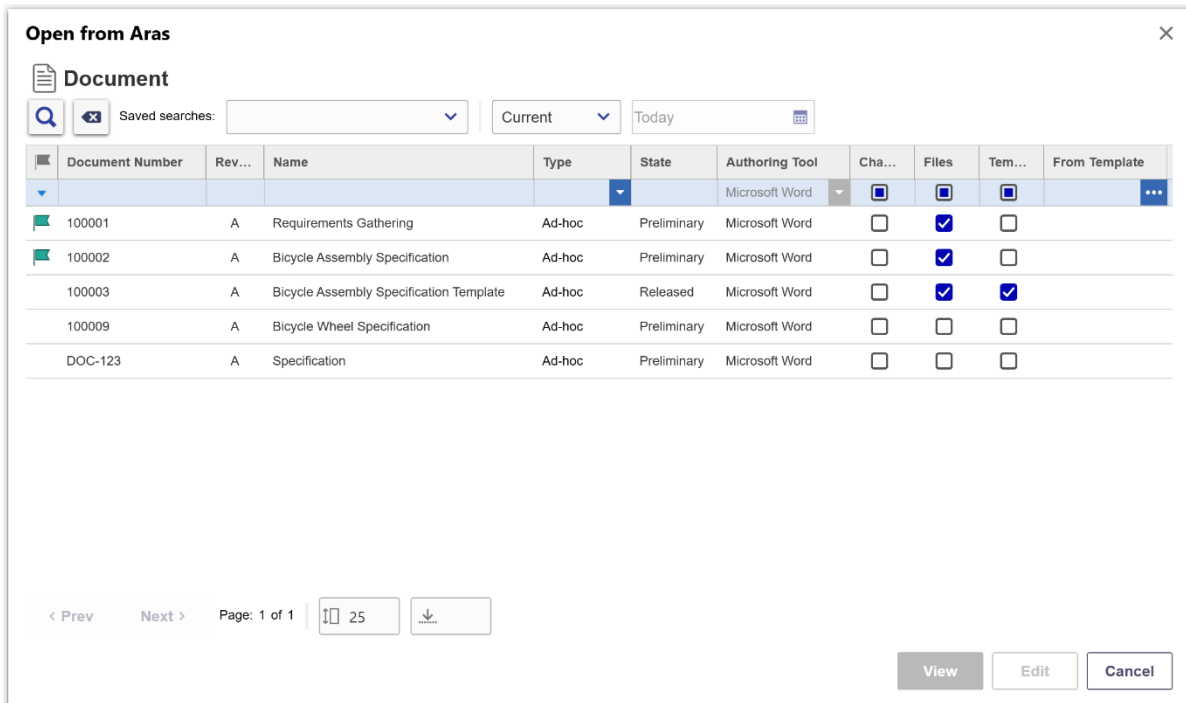


6 Opening Documents from Aras

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.

6.1 Search Dialog for Documents

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



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

Capabilities within this Search dialog include:

- **Blue Search Row**

In the top, blue-colored row, you can enter search criteria for any column. You may enter search criteria for multiple columns simultaneously, and you may use the asterisk "*" character as a wild card. Some examples:

- **a*b** means anything starting with **a** and ending with **b**
- ***bolt*** means anything with the word **bolt** in it
- ***** means any non-blank value

- **Run Search**

This executes the search based on the values you entered in the blue search row. In addition to the criteria you entered, the search results will automatically be filtered so:

- Only Documents managed by the Aras Office Connector will be listed.
- Only Documents with “Authoring Tool” equal to your current Office application will be listed.

If you do not enter search criteria in the blue bar, all Documents in Aras that are managed by Aras and with the matching Authoring Tool will be listed.

- **Clear Search Criteria**

The **Clear Search Criteria** button clears any search criteria you entered in the blue search row, so that you may enter different criteria.

The Aras Office Connector displays the last entered search criteria within the blue search row when a search dialog is reopened. Users can toggle this functionality in **Preferences** by enabling/disabling **Show last search criteria**.

Preferences ✕

Stored list of Server URLs:

http://localhost/InnovatorServer1	<div style="margin-bottom: 5px;">Add</div> <div style="margin-bottom: 5px;">Remove</div> <div style="margin-bottom: 5px;">Edit</div>
http://localhost/InnovatorServer2	
http://localhost/InnovatorServer3	
http://localhost/InnovatorServer4	
http://localhost/InnovatorServer5	

Show Virtual Saved Searches
 Bypass property synchronization warning
 Show last search criteria

OK
Close

- **Item type**

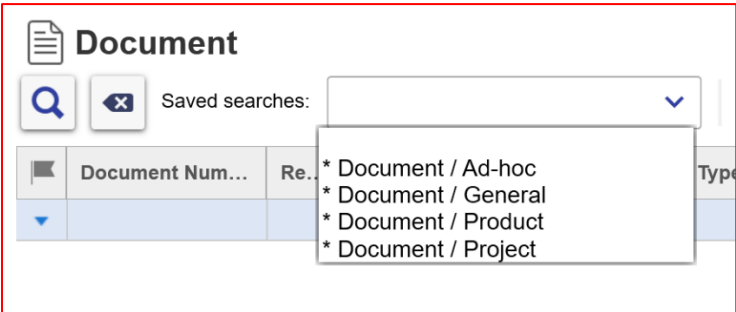
This lists the various Aras Item Types that you can search on. Only Item Types corresponding to your valid set of Document Types can be selected.

• **Saved Searches**

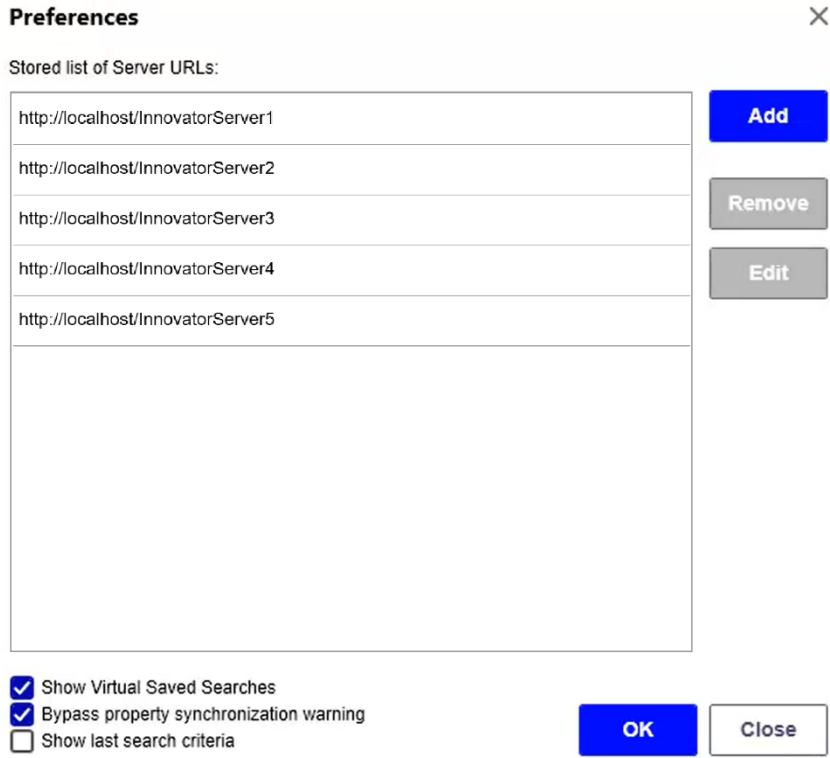
The select list next to Clear Search Criteria enables you to select a pre-defined Saved Search. Saved Searches are defined in the Aras Web Client using the **Add to Favorites** command. Once defined they will appear in the list; if you select one it will immediately execute that saved search and show the criteria in the blue search row.

Note: The saved searches created from Advanced or AML search types in the Aras web client do not work in this search dialog.

The Saved Searches selector automatically includes “virtual saved searches” that correspond to each Document Type you have access to. These virtual saved searches are indicated by an asterisk in front of the name. For the “Document / Product” Document Type, there will be a virtual saved search called “*Document / Product”. These virtual saved searches just provide an easy way to access all documents of a given type.



Users can hide virtual saved searches in **Preferences** by disabling **Show Virtual Saved Searches**.



- **Effectivity Type and Calendar Search**

This provides a way to search versionable items to further filter search criteria.

- Search results only display for the version of the items that the user has permission for.
- Only current versions are available to open in Edit mode. Previous versions will open in View mode. Users can select **Get Latest Version** command to open the current version without needing to close and reopen the document.
- Users can leverage **Browse Versions** to view a list of all Document versions or open a different version of the same Document.

There are four Effectivity Types available:

- **Current** – Displays the latest Document version that exists as of today.
- **Latest** – Displays the latest Document version that exists as of the calendar date selected.
- **Released** – Displays the latest released Document version that exists as of the calendar date selected.
- **Effective** – Displays the latest effective Document version that exists as of the calendar date selected.

- **Column Sorting**

Clicking on any column header in the search dialog causes the search results to be sorted by that column. Clicking the same column again reverses the order.

6.2 View and Edit Options

Once you have located the desired Document using the search dialog, you can open it in either view or edit mode. For view mode, select the row with the document and click the **View** button, or just 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**

- Document opens as Unclaimed.
- Is used when you have no intention of modifying the file, and wish to just read the file, copy content from it, or do a **Save As to Aras** with it.
- Is the only possible mode if you don't have rights to claim the Aras Document, for example if the Document is released or claimed by someone else.

- **Edit Mode**

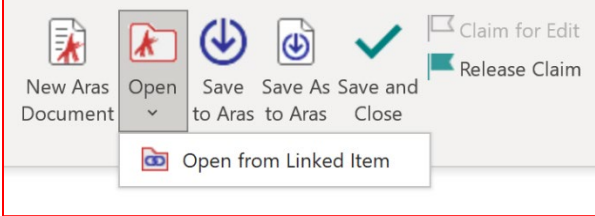
- Document opens as Claimed. No one else can make changes until you unclaim it.
- Is used when you intend to modify the contents of the file.

If you attempt to open the file using Edit mode, and the system is unable to claim the Document, the connector will prompt you if it is OK to open the file for view only.

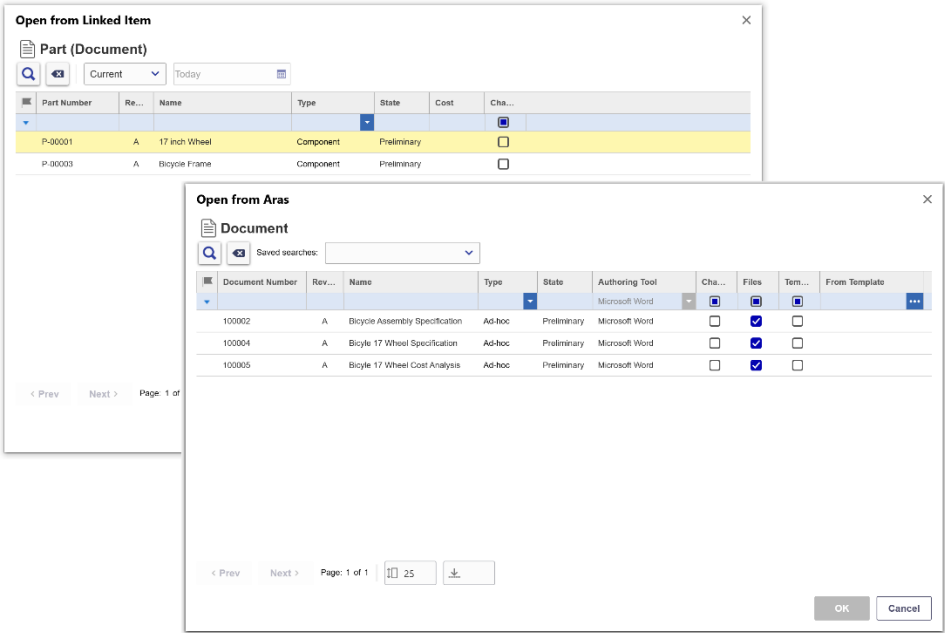
It is possible to open the file for view only, and later claim the Aras Document to allow you to perform edits. However, if someone has modified the Aras Document in the meantime, you will be unable to claim it because your file will be outdated. See the next section for details.

6.3 Opening from a Linked Item

It may be easier to locate your Document by searching for an item it is linked to, rather than the Document itself. For example, you know that the Document pertains to a Part or a Project you are working on. The **Open from Linked Item** command provides an easy way to do this. This command is accessed by clicking on the arrow below the Open command:



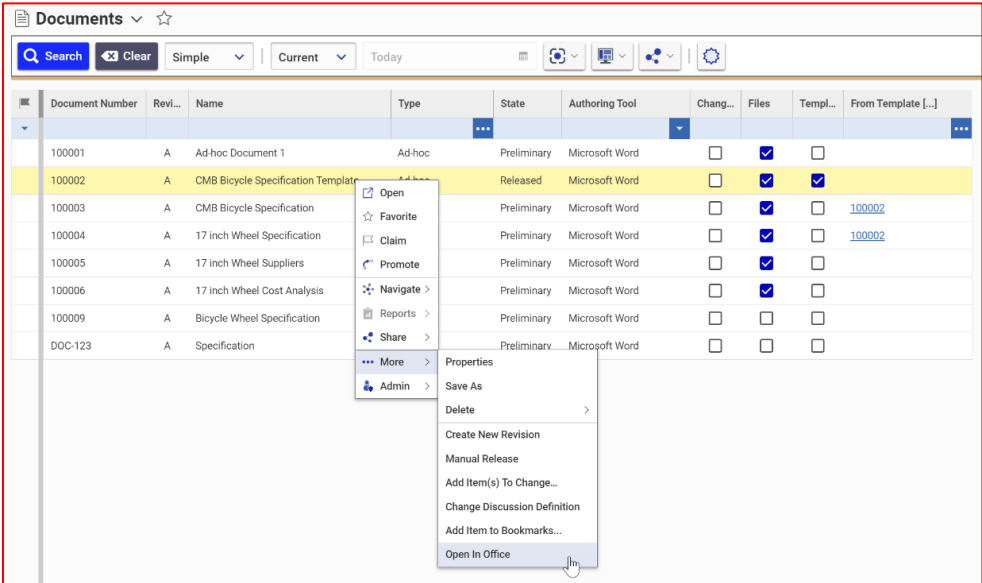
This opens a search dialog where you can pick the desired type of linked item, using the “Item Type” selector, and then search for that item. Select the desired item and then pick the View or Edit option as with the regular open command. If the item has more than one Document associated with it, you will see a second dialog prompting you to pick the specific Document you want to open. The following example shows searching for a linked Part, which has two associated Documents.



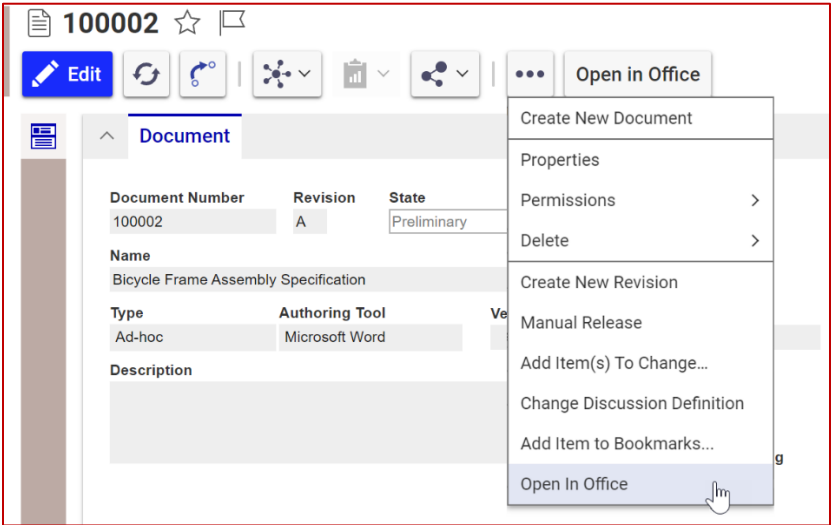
6.4 Opening from the Aras Web Client

In addition to using the **Open** command to open a document, you can also open it directly from the Aras web client. This is done by picking the **Open In Office** action, which is available from the search results grid and the Document item command bar.

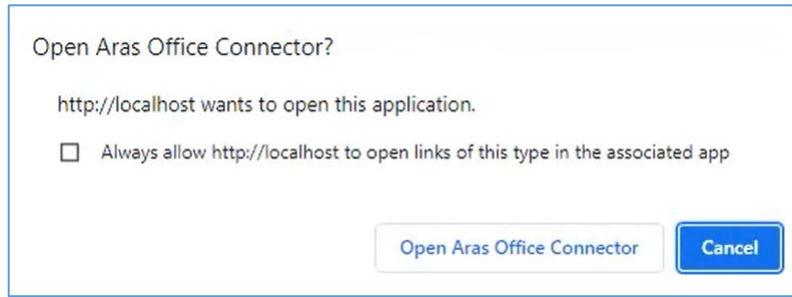
If you perform a search on Documents in the main Aras search grid, you can right-click on a Document and pick the **Open In Office** command from the context menu.



If you open the Document item, then you can pick the **Open In Office** command from the item toolbar, or from the Actions menu:

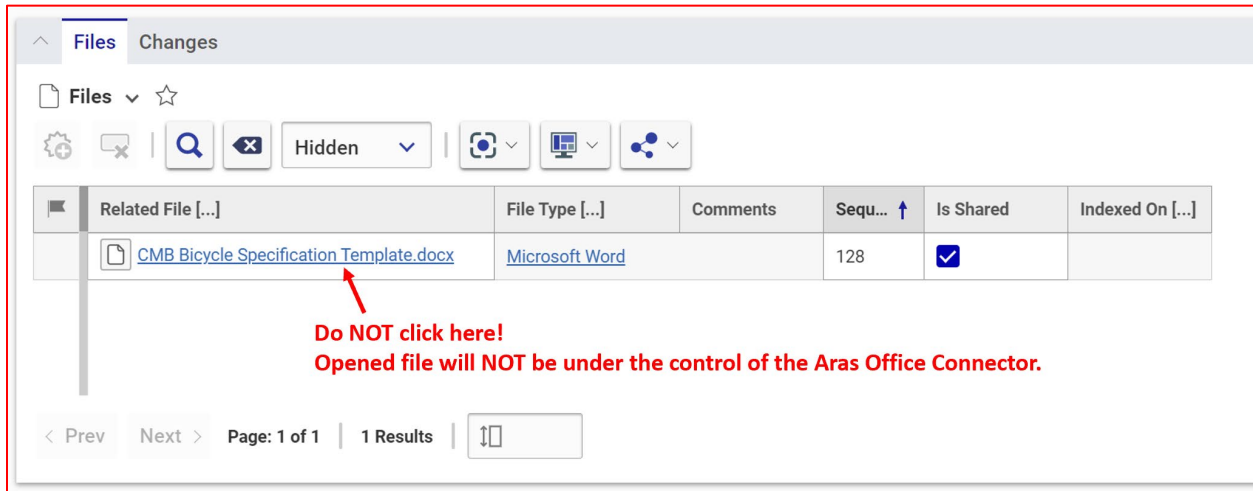


You will then get a dialog like the following (which may look different depending on which web browser you are using):



Click **Open Aras Office Connector** to open the file in the MS Office application, under the control of the Aras Office Connector. You can then continue with your work.

Note: Do NOT click on file hyperlinks for Office files in the Aras web client if you want to edit them using Office Connector! These hyperlinks open files in the Office application, but they are not under the control of the Office Connector.



7 Edit Control

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

7.1 Document Claiming and Unclaiming

In Aras terminology, when you **Claim** an item like a Document, you reserve it so that only you can edit it. Only one person at a time can claim any given item. When you **Unclaim** the item, you make it available for others to potentially 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 Connector uses the claim and unclaim functions to control who has the rights to edit files. The claim status is indicated by the “Claimed by” field in the ribbon; if this is showing a name, then the Document is claimed, and if not, it is unclaimed. If it is showing your name, then you have edit rights.

The Aras Office Connector automates much of the claim and unclaim behavior in ways that is intuitive when working on your Office files. This includes:

- When you use **Open** in Edit mode, the Document is automatically claimed.
- When you use **Open** in View mode, the Document is not claimed. If you later attempt to use Save to Aras, the connector will prompt you if you want to claim the Document at that time.
- When you use **Save to Aras**, the Document is kept claimed afterwards, the assumption being that you are continuing to work on the file.
- When you use **Save and Close**, the Document is unclaimed, the assumption being that you are done working on the file.

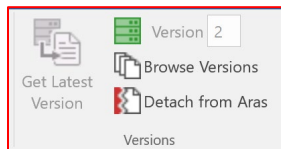
Remember to use **Save and Close** when you have finished editing and Aras takes care of proper claiming and unclaiming.

At any time, you can also use the **Claim** or **Unclaim** commands in the ribbon, depending on the current state of the Document. If currently unclaimed, you may use **Claim**, and this will give you editing rights. If currently claimed, you may use **Unclaim**, and this will remove editing rights.

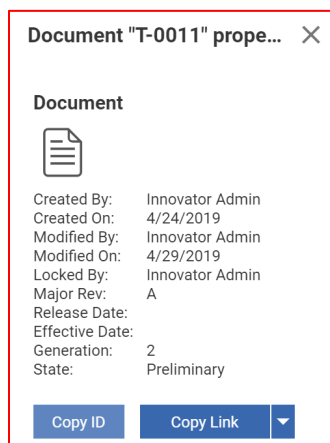
Note: If you have made local changes to a file and then use **Unclaim**, the system will prompt you if it is **OK** to lose local changes or not.

7.2 Creating Document Versions

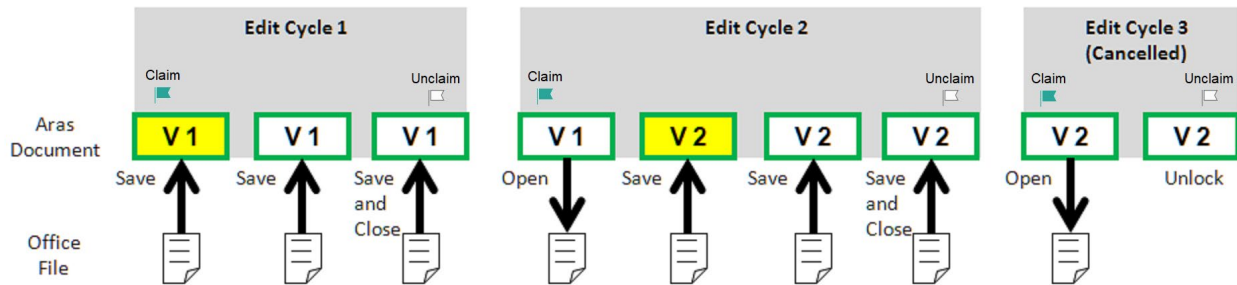
Aras provides version management for your Office files, based on the normal edit cycles you go through when working on your files. The version number starts at 1 and counts from there as you make editing changes. The version number is displayed in the Office ribbon, in the Versions section:



In the Aras web client, version is referred to as “Generation” and is displayed in the Properties dialog.



The following diagram shows how versions are created based on your edit cycles:

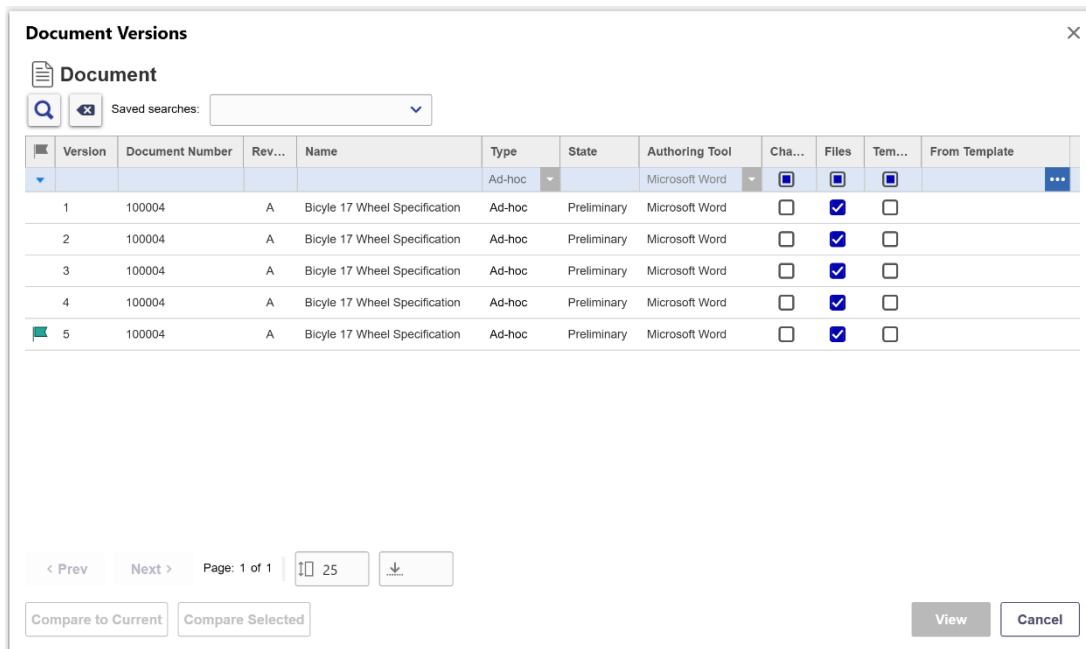


Important things you should understand from this diagram are:

- One version is created for each complete edit cycle, which consists of Claim, Save, and Unclaim.
- Additional saves performed within an edit cycle just overwrite the file stored within the version.
- Since a new version is not yet created when the Claim happens, you can cancel an edit cycle by doing an Unclaim before you do a Save.

7.3 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 using the **Browse Versions** command, after you've already opened a file using **Open**. Clicking **Browse Versions** will open a dialog like this, after you click **Run Search** to show all versions:



Select the desired version to open and click **View**.

Since the file stored with each Aras version has the same File Name, some special handling should be used to be able to have multiple files with the same File Name active in Office at the same time. As described in section 3.4, Office files are managed locally in an Office sub-directory of the Aras working directory, for example "C:\ArasWork\Office". This is where the latest version always resides. If you open an old version, it creates a sub-directory using the version number, put the old version in there. For example, let's say there are three versions of a particular Document stored in Aras, and the File Name is "myfile.docx". Then the user performs this sequence of commands:

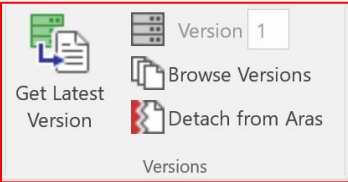
Table 1:

Open	Version 3 file is stored as C:\ArasWork\Office\myfile.docx
Versions select version 2	Version 2 file is stored as C:\ArasWork\Office\2\myfile.docx
Versions select version 1	Version 1 file is stored as C:\ArasWork\Office\1\myfile.docx

After this sequence, all three versions will be active in Word at the same time.

Note: The ability to open multiple versions at the same time only works in Word and PowerPoint. It is not supported in Excel and Visio. If you use **Browse Versions** in Excel or Visio, the connector will prompt you if it is **OK** to close the current version first, so that the old version can be opened.

When you open an old version using **Browse Versions**, it will be indicated in the ribbon by a grey status icon like this:



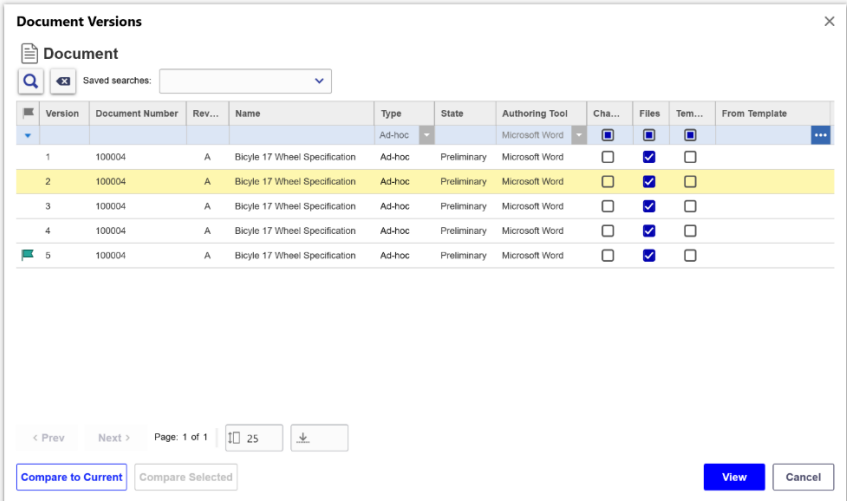
You will not be able to claim or save an old version back into Aras. It is read-only.



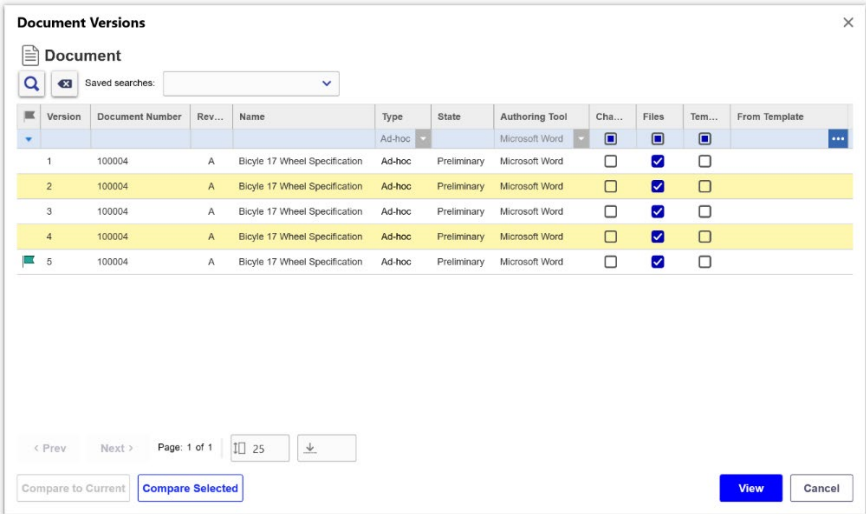
7.4 Comparing Two Versions in MS Word

Within MS Word only, the **Browse Versions** dialog contains two buttons that enable you to easily compare two versions of the same file.

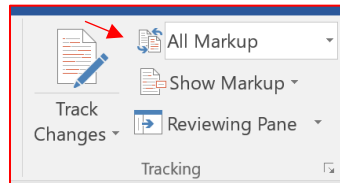
If you select one version, the **Compare to Current** option is enabled. Clicking this opens a comparison between your current version and the selected version.



If you select two versions, the **Compare Selected** option is enabled. Clicking this opens a comparison between the two selected versions.



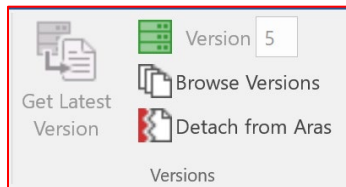
The result in both cases is that a new temporary window appears showing the comparison between the two versions of the file. You can use the **Display for Review** function in the Review ribbon of MS Word to control the style of how the comparison is displayed. Once you finish reviewing, the differences simply close the window.



7.5 Updating an Outdated Version

Aras's version handling can result in outdated document versions on your local disk. Consider the following scenario:

- Beth creates a **New Aras Document** in Word. After editing the file and then using **Save and Close**, the Aras Document is at version 1 and unclaimed.
- Terry uses **Open** in View mode, to be able to read this document. He does not claim or edit the file, but it stays in his local working directory.
- Beth then uses **Open** in Edit mode, makes some editing changes, and saves back into Aras using **Save and Close**. Now the Aras Document is at version 2 and unclaimed.
- Terry opens the file locally, and the Aras ribbon indicates that the file is out-of-date.
- Terry uses the **Get Latest Version** command, and he is prompted that he will lose any local changes if he continues. He clicks **OK**, and the latest version of the file is brought from Aras, replacing the file in session. The Aras ribbon is updated:



You can use the **Get Latest Version** command to refresh the local file with the most recent version from Aras.

The following chart summarizes all the behavior of **Browse Versions** and **Get Latest Version**, depending on the current status:

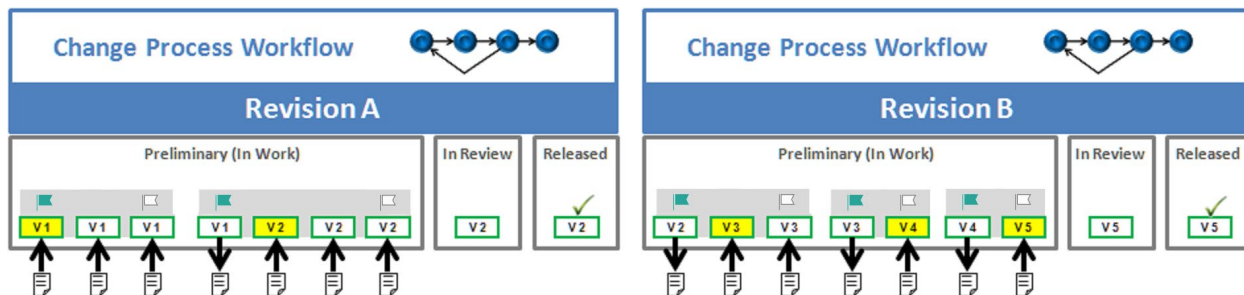
Icon	Browse Versions	Get Latest Version
- Not Connected	Not available	Not available
- Latest	Allows opening any other version, which is opened in a separate window*	Not available (Latest is already active)
- Outdated	Allows opening any other version, which is opened in a separate window*	Displays a message “Current file needs to be closed to perform this operation. OK to close current file and open latest version from Aras? Any local changes will be lost.” If you answer OK, the file currently in session is replaced by the new version from Aras.
- Old (non-latest)	Allows opening any other version, which is opened in a separate window*	The latest version is opened in a separate window*

*Except in Excel, in which case the existing file is closed

7.6 Document Change Process

In addition to the ability to control versioning with the Aras Office Connector, Aras provides full enterprise change process capabilities for Documents. This process enables you to create revisions of Documents, driven by an approval workflow where the Documents progress through a set of life cycle states. This process is typically driven from 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 done at your company. We will just introduce the topic and explain how the Aras Office Connector interacts with the change process. For further details, please refer to general Aras’s 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 being modified again and released to revision B. The grey boxes marked “Preliminary”, “In Review”, and “Released” indicate the life cycle states of the Document.



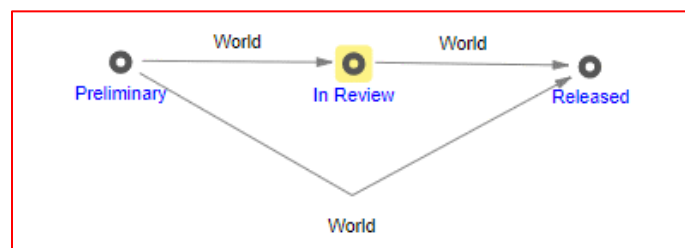
The highlights of the diagram are:

- The edit cycles described in the diagram in section [7.2](#) are shown here as well; 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.
- The life cycle state of the Document is changed by activities taking place within the workflow. For example, the Document moves from “Preliminary” to “In Review” when the responsible user says the Document editing is complete.
- Versions (also called 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 if needed.
- The new “to be” revision is assigned to the Document as soon as it moves to “Preliminary” state.
- During “In Review” state, the Document contents are being reviewed by those people responsible. If they approve, the Document moves to “Released”. If they do not approve, it is possible for the workflow to loop back so that the Document goes back to “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, in order to fit company processes. The example shown is based on the out-of-the-box behavior of the software.

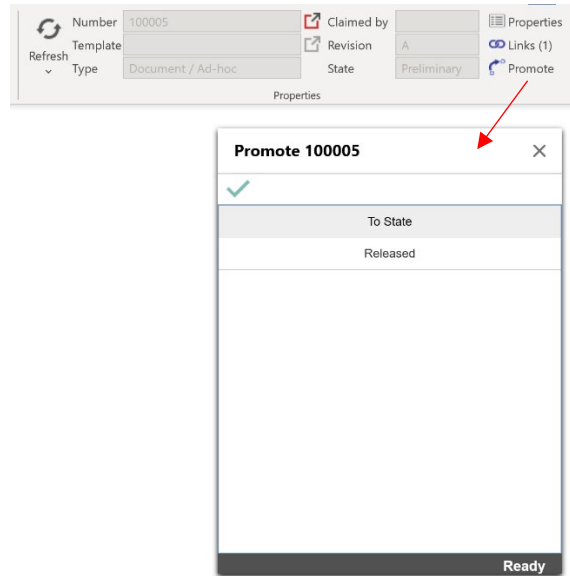
Note: The user can always see the revision and state of the current Document in the Aras ribbon.

7.7 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, but 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 your Documents are defined in this manner, then your administrator can set up the Aras Office Connector such that you can access the Promote command directly from the Office ribbon. By clicking on this command, you can promote your current Document to a desired state. Note that the Document must be unclaimed to promote.



In addition to the Promote command in the ribbon, you can promote to a new state during the **Save and Close** command, as described in section [4.4](#).

8 Document Templates

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

8.1 Creating Document Templates

A Document template in Aras is just a regular Document with the “Template” checkbox checked. It contains an Office file that is used as the basis of any new file created from the template. The Office file you use for the template should be a regular file format (like .docx, .xlsx, or .pptx). There are two methods for creating Document templates; either 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 Connector.

8.1.1 Creating a Document template manually

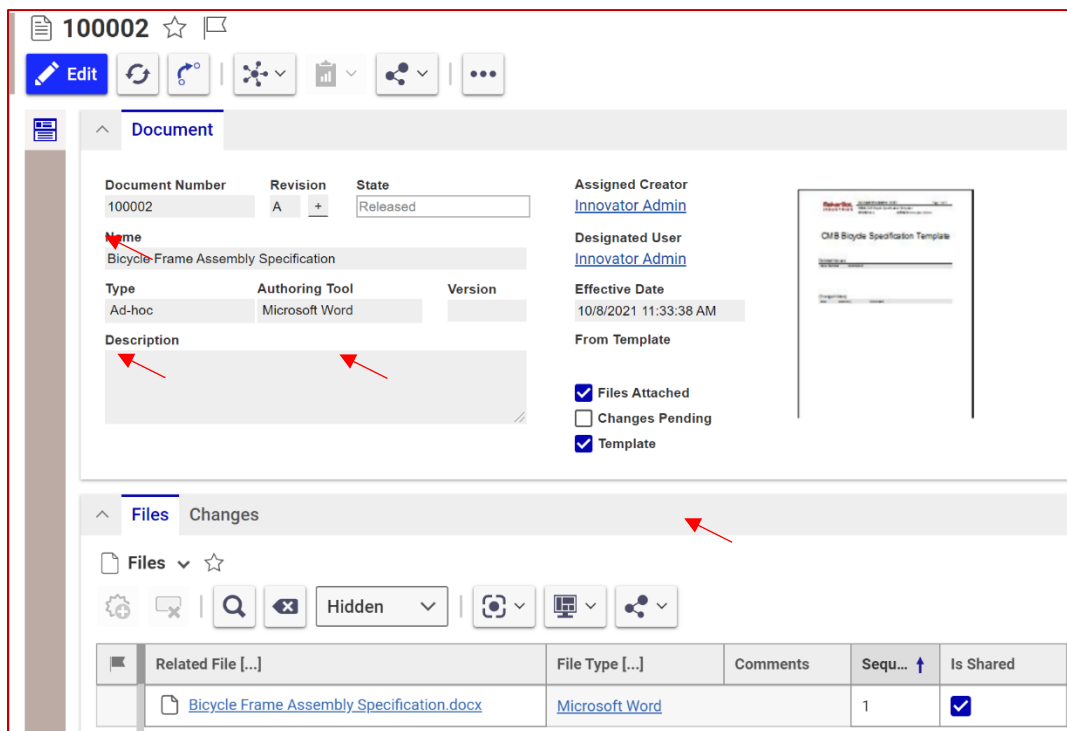
1. Create your template file in the Office application and save it locally.
2. Log in to the Aras web client.
3. Create a new Document (or similar item defined as an Office Document Type).

4. Set the following properties:
 - a. Number
 - b. Type
 - c. Authoring Tool
 - d. Template checkbox ON
5. Attach your template file on the Files tab.
6. Save and Close the Document.

8.1.2 Creating a Document template using the Office Connector

1. Create a Document using the connector, using one of the following approaches:
 - a. Use **New Aras Document** to create a new file, create the file contents, then **Save to Aras**.
 - b. Create the file contents locally, then **Save to Aras**.
2. Log in to the Aras web client.
3. Search for the Document you just created and open the form.
4. Set the Template checkbox ON.
5. Remove any viewable file, such as PDF, if it exists.
6. Save and Close the Document.

At this point, the template is ready to be used by the Office Connector. Regardless of the method used, you will end up with a Document that has the following key properties set:



These properties are used for the following purposes:

- **Document Number** – Main identifier for the template. Appears in the Aras ribbon.
- **Type** – Sets which Document Type the template is for. The template will only be listed when you select that Document Type in the **New Aras Document** dialog.
- **Authoring Tool** – Controls which Office application the template is to be used for. The template will only appear in the **New Aras Document** dialog when you are in that application.
- **Template** – Marks this Document as a template.
- **File** – The file that is used when you create a New Aras Document using this template.

9 Other Capabilities

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

9.1 Property Mapping and Embedding

Both Office and Aras Innovator have the concept of Properties, textual information that describes a Document. the Aras Office Connector provides the capability to 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	Visio	Outlook
From Office File to Aras	X	X	X		
From Aras to Office File	X	X	X		
From Outlook Email to Aras					X
From Aras to Word	X				
From Word to Aras	X				
From Aras to Excel		X			
From Excel to Aras		X			
From Aras to Excel Cell		X			
From Excel Cell to Aras		X			
From Aras to PowerPoint			X		
From PowerPoint to Aras			X		
From Aras to Visio				X	
From Visio to Aras				X	

The property mappings in use at your site are defined by your administrator. 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, PowerPoint, and Visio:

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

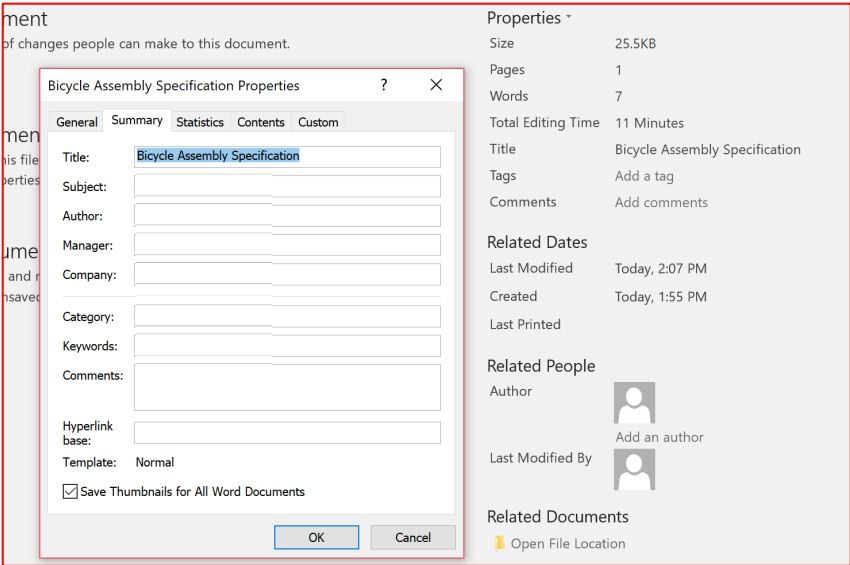
When properties are mapped from Office to Aras, it means that you can set the values from within the Office application, and they will be set into the Aras Document.

There are two ways to set these properties:

- **From the Office application:**

Show the **Document Properties** panel and enter values from there. Note that this includes properties that may not be mapped with Aras.

Navigate to **File > Info**, and observe the Properties listed. Select the **Properties** dropdown and select **Advanced Properties** to view additional options.



- **From Aras Office Connector:**

Use the **Properties** command to display those properties that are mapped with Aras. There are two places the Properties command appears – from within the **New Aras Document** dialog, 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**, you will be able to edit properties mapped from Office to Aras on “Create”. When accessing Properties from the ribbon, you will be able to edit properties mapped from Office to Aras on “Update”.

Properties ✕	
Property	Value
Aras Created On	4/9/2021 8:41 PM
Title	17 Inch Wheel Suppliers
Aras Author	Innovator Admin
Subject	
Aras Document	100005
Revision	A
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

When properties are mapped from Aras to Office, it means that you can set the values from Aras Innovator, and they will be set into the Office file. 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.

Properties mapped from Aras to Office will also be updated in your Office file when you click the **Refresh** command in the Aras toolbar.

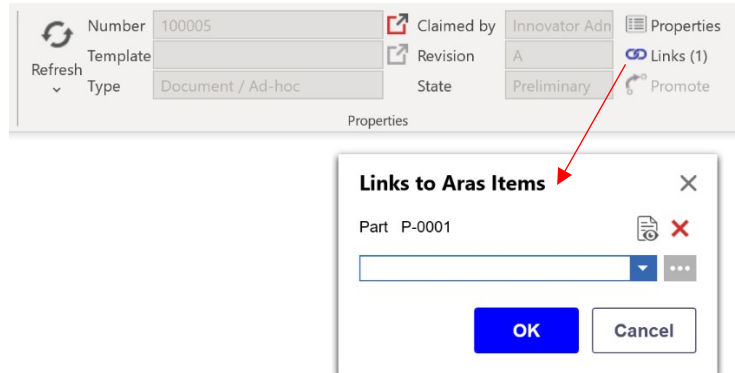
In MS-Word, properties may be embedded within the file itself, allowing you to dynamically display properties coming from Aras within the Word file. This is done using **Insert > Quick Parts > Document Property** (for standard properties) and **Insert > Quick Parts > Field...** (for custom properties)

9.1.1 Mapping to and from Excel Cells

Using the mapping directions “From Aras to Excel Cell” and “From Excel Cell to Aras” allows you to tie values of worksheet cells 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....**

9.2 Item Links

As shown in section 4, you may link to an Aras item, such as Part or Project, at the time of first creating the Aras Document. It is also possible to add or remove additional item links after the initial creation using the **Links** command in the Document Info section of the ribbon. Notice the current number of existing links is shown in the ribbon:



If there are already existing links, they will be displayed in the dialog, and you can click the X to remove them. You can add any number of existing links by selecting the item type, and then searching for and selecting the desired item(s). Clicking the **Show Aras Item** button next to the item will open the Aras form of that item (Internet Explorer only).

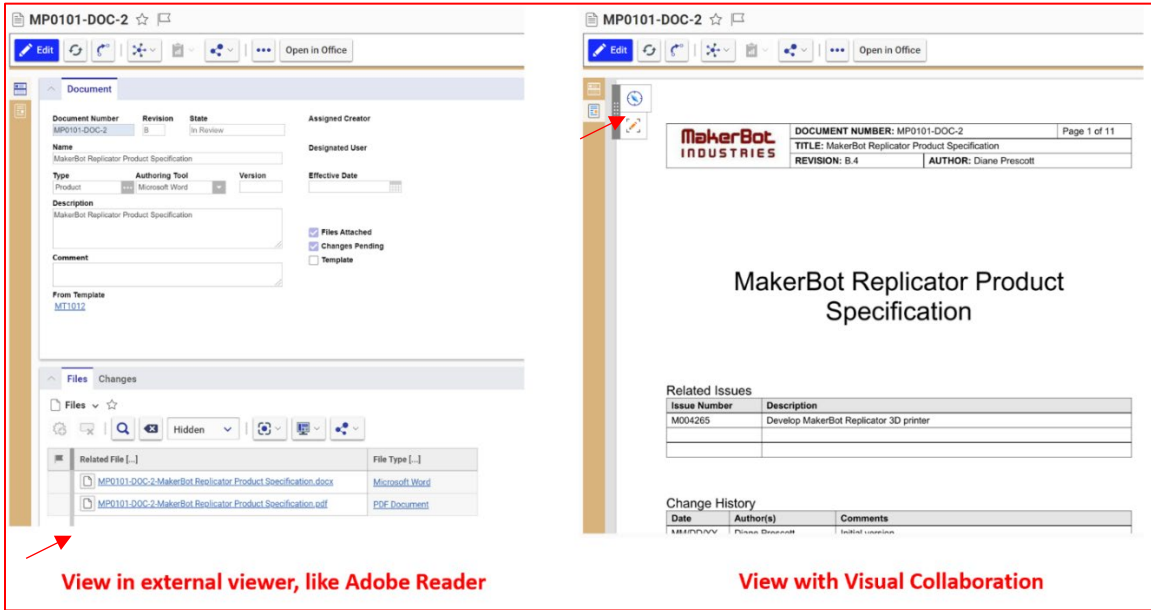
The advantage of creating the link during the initial creation of the Document is that you can drive the File Name and Document Number based on the linked item. If you create a link later using **Links**, it does not affect the File Name and Document Number.

9.3 Viewable Files and Visual Collaboration

A useful feature of the Aras Office Connector is to automate the creation of viewable files, such as PDF, during the save process. All settings which control viewable file generation are controlled by the administrator, in order to enforce standard processes within the company. There are two settings your administrator should make you aware of:

- Which viewable file type is 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 **Save and Close**, or is user-selectable (in which case the **Viewable** checkbox appears in the ribbon)

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

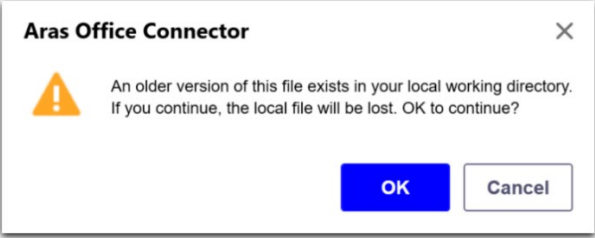
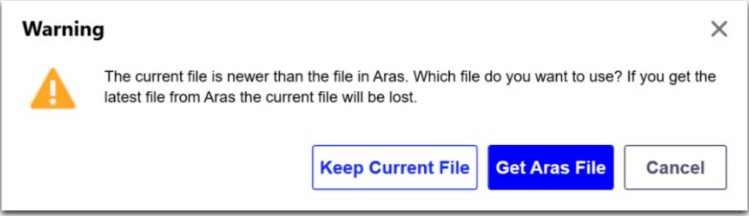


9.4 Local File Checks

When you open a file from Aras, the Aras Office Connector checks to see if that file already exists in your local working directory and will warn you in case the files are different. The following cases can occur:

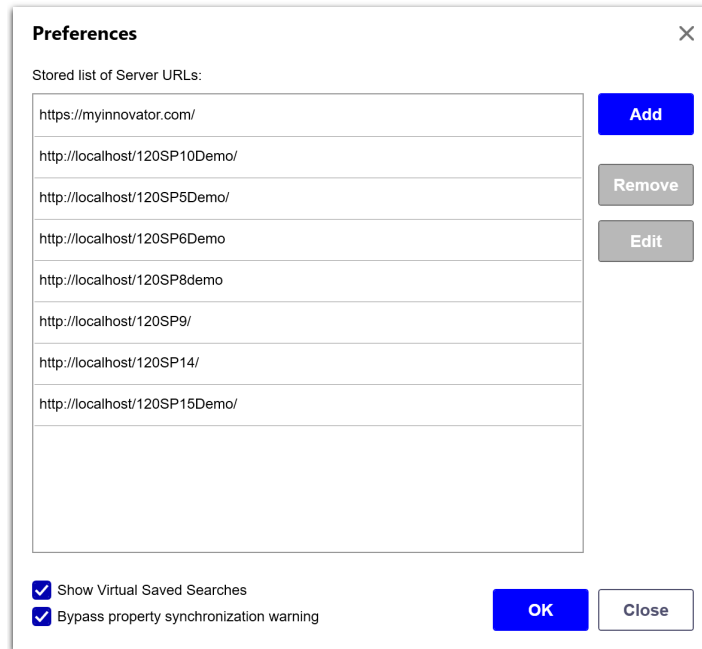
Status of file in local working directory	Behavior
File does not exist	File is opened with no warning message
File exists, and is equal to the file in Aras	File is opened with no warning message
File exists, local file is equal to the file in Aras, and Document properties are not synchronized	<p>This warning message appears:</p> <div style="border: 1px solid gray; padding: 10px; width: fit-content; margin: 10px auto;"> <p>Save to Aras ✕</p> <p> Properties of the Innovator Document have been changed. Changes will now be saved to Aras to preserve Aras to Office property mappings.</p> <p><input type="checkbox"/> Do not show this message again Save to Aras Cancel</p> </div>



Status of file in local working directory	Behavior
	<p>If you click Save to Aras, the Document item will be claimed and the properties from Aras and the local file will synchronize.</p> <p>If you click Cancel, the operation is aborted.</p>
File exists, and is older than the file in Aras	<p>This warning message appears:</p> <div data-bbox="646 499 1237 735">A dialog box titled "Aras Office Connector" with a close button (X) in the top right corner. It contains a yellow warning triangle icon on the left. The text reads: "An older version of this file exists in your local working directory. If you continue, the local file will be lost. OK to continue?". At the bottom, there are two buttons: "OK" (blue) and "Cancel" (white with blue border).</div> <p>If you click OK, the file from Aras is opened and overwrites the local file.</p> <p>If you click Cancel, the operation is aborted.</p>
File exists, and is newer than the file in Aras	<p>This warning message appears:</p> <div data-bbox="646 947 1390 1161">A dialog box titled "Warning" with a close button (X) in the top right corner. It contains a yellow warning triangle icon on the left. The text reads: "The current file is newer than the file in Aras. Which file do you want to use? If you get the latest file from Aras the current file will be lost.". At the bottom, there are three buttons: "Keep Current File" (blue), "Get Aras File" (blue), and "Cancel" (white with blue border).</div> <p>If you click Keep Current File, the local file is opened directly.</p> <p>If you click Get Aras File, the file from Aras is opened and overwrites the local file.</p> <p>If you click Cancel, the operation is aborted.</p>



The property synchronization warning can appear frequently for users who manage Document property data in Aras Innovator. Users can bypass this warning dialog when opening a Document from Aras Office Connector by selecting “Do not show this message again” directly in the warning dialog or by going to Preferences. When enabled, **Save to Aras** will automatically be executed to synchronize Document properties.



9.5 Local File Operations and Detaching from Aras

When Office files are managed by the Aras Office Connector, internal tracking properties are used so that the connector can keep track of which Aras Document the file is associated with. Because of this tracking information, any of the following actions will break the connection between the file and its Aras Document:

- Renaming the file in the local working directory.
- Making a copy of the file in the local working directory (for the new copied file).
- Using the standard Office **Save As** command.

After these operations, if you use the **Save to Aras** command, it will treat it as a new file and bring up the Save to Aras dialog.

You can also directly detach the existing Office file in a session from Aras, using the **Detach from Aras** command in the ribbon. This is useful, for example, if you want to transmit the file outside your company and don't wish to maintain the Aras tracking information inside the file. Note that this command does not affect the Aras Document at all.

9.6 Offline Use

It is always possible to open and work on any Aras-managed Office file from your local working directory, even if you are not connected to a network (or to a network with access to your Aras instance). Just use the regular Office “Save” command to continue to save your work locally. When you reconnect to the company network and have access to Aras again, click the **Refresh** or **Save to Aras** command in the Aras ribbon. This prompts you to log in and establish the Aras connection. You can then save your work back into Aras using any of the various save options.

9.7 Tracking Changes and Comments

Aras Office Connector can keep track of whether your documents currently contain either change tracking or comments. This ability, if enabled by your administrator, works automatically and allows you to see briefly the status of changes and comments. For example, this can be shown in the search results like this:

Docume...	Rev...	Name	Type	State	Authoring Tool	Changes	Files	Template	From Template
100001	A	Requirements Gathering	Ad-hoc	Preliminary	Microsoft Word	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
100002	A	Bicycle Assembly Specification	Ad-hoc	Preliminary	Microsoft Word	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
100003	A	Bicycle Assembly Specification Template	Ad-hoc	Released	Microsoft Word	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
100004	A	Bicycle 17 Wheel Specification	Ad-hoc	Preliminary	Microsoft Word	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
100005	A	Bicycle 17 Wheel Cost Analysis	Ad-hoc	Preliminary	Microsoft Word	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
100009	A	Bicycle Wheel Specification	Ad-hoc	Preliminary	Microsoft Word	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
DOC-123	A	Specification	Ad-hoc	Preliminary	Microsoft Word	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

This supports a collaborative process whereby other users can add changes or comments to your document. You will know briefly that they exist and need to be incorporated in your next update. You could use this to prevent documents from being released that still have unincorporated changes or comments.

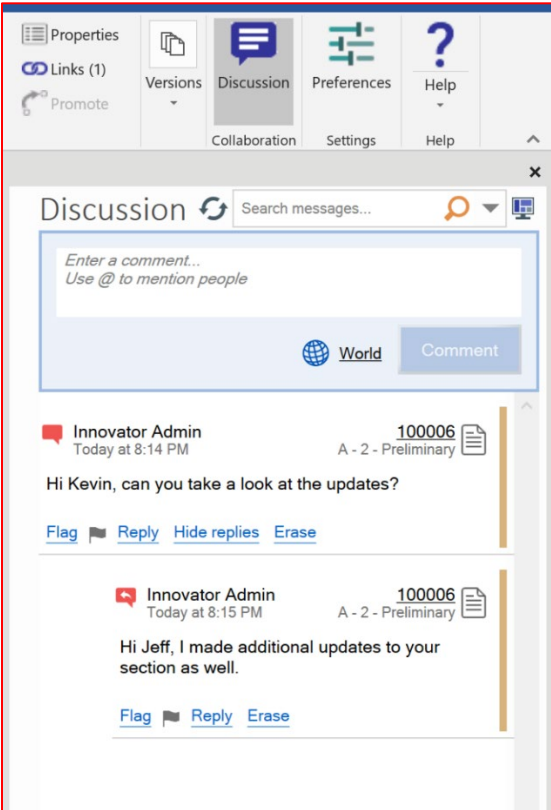
This capability is supported by the MS Office applications as follows:

Option	Word	Excel	PowerPoint	Visio
Change Tracking	X	X		
Comments	X	X	X	X

10 Visual Collaboration Discussions





Aras Office Connector provides easy-to-use social collaboration using Aras Visual Collaboration discussions directly inside MS Office. Users can view comments made relative to the active document, and post further comments or replies. This capability is available provided your administrator has enabled Visual Collaboration for your document types.

The Discussion Panel can be shown or hidden via the **Discussion** button in the Aras ribbon. The Discussion Panel appears on the right side of the Office Application.



10.1 Discussion Panel Toolbar

The toolbar on the Discussion Panel has various controls for entering comments and controlling the display of messages within the panel. The toolbar functions are described in the following figure and table.

Parts of Discussion Toolbar	Icon	Properties
Comment Entry Box		Users create new comments within the Discussion Panel by typing text into the Comment entry box and clicking the Add comment button. The comment appears within the content area of the Discussion Panel.
Message Sorting Options		There are three kinds of message sorting options: <ul style="list-style-type: none"> ○ Conversation ○ Thread Date ○ Message Date
Message Display Options		Changing this selector changes the style of all comments in the Discussion. There are two modes of display: <ul style="list-style-type: none"> ○ Standard - Standard mode is the normal mode which is the default mode that is selected. ○ Review - Review mode is for reviewing markups. In this mode, all the markup messages are displayed as a "snapshot style".
Basic search Box		Type in any word in the search box to start searching for specific messages.
Advanced Search Options		This provides advanced message search options.
Comment Sharing Options		Changing this selector changes who will be able to see the posted comment.

10.2 Creating a Text Comment

The user can enter a text comment within the discussion panel when the document is active.

Use the following procedure:

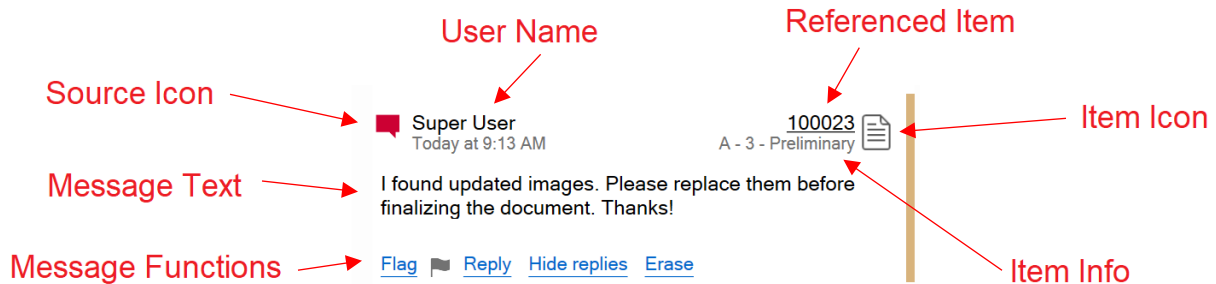
1. Click on **Show Discussion Panel** in the Aras ribbon to show the discussion panel.
2. Type in the required text in the **Comment** entry box within the Discussion Panel.
3. Click the **Add Comment** button to post the comment.

Note: Pressing the Enter key does not post the comment. It creates a new line.

4. Once you enter a comment, it appears within the content area of the Discussion Panel.

10.3 Components of a Message

Once the message is shown within the area of the discussion panel, there are various components in it that have specific properties.

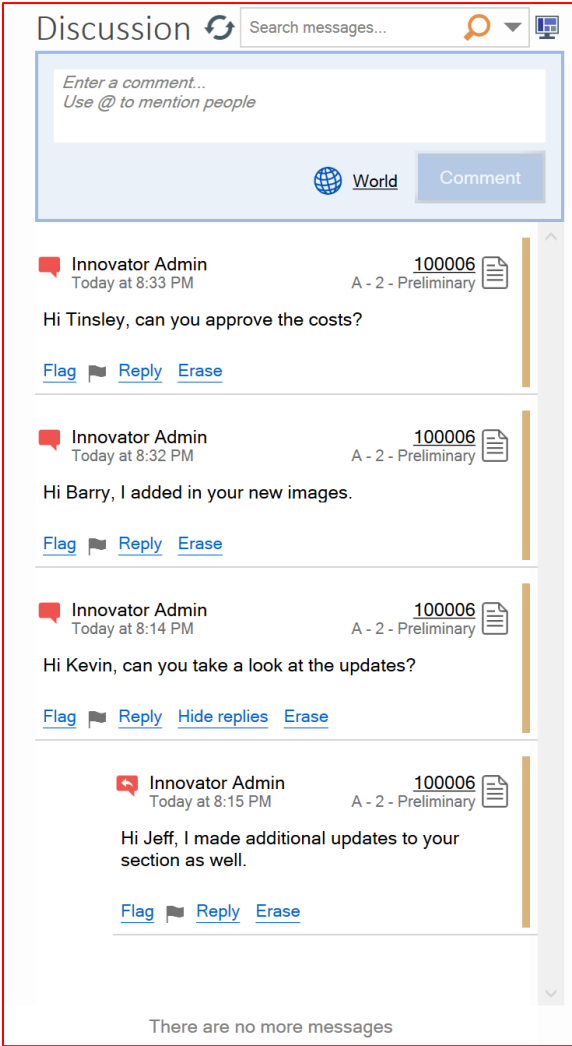


The table contains properties information for a message that appears in the discussion panel.

Components of Message	Properties
Source Icon	Indicates whether the source of the message is from a user comment, reply or automatic.
User name	Indicates the name of the user who created the comment, either directly or indirectly through History.
Creation time	Indicates the time when the message was created.
Referenced Item	Indicates the name of the item that the message is in reference to. Clicking on the hyperlink will open that item in the Aras web client.
Item Info	The Item Info shows the basic information from the item at the time the message was created. The displayed string is a combination of up to three properties from the referenced item: <ul style="list-style-type: none"> ○ Current revision of the item ○ Current generation (version) of the item ○ Current lifecycle state of the item
Item Icon	Icon corresponding to the referenced Item.
Message Text	The text of the message.
Message functions	The functions that can be performed on the message.

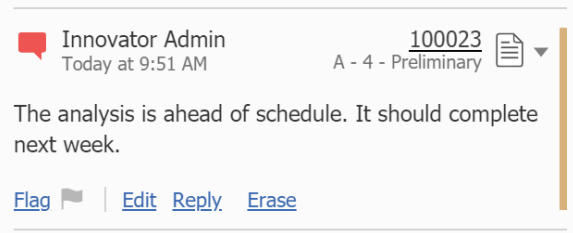
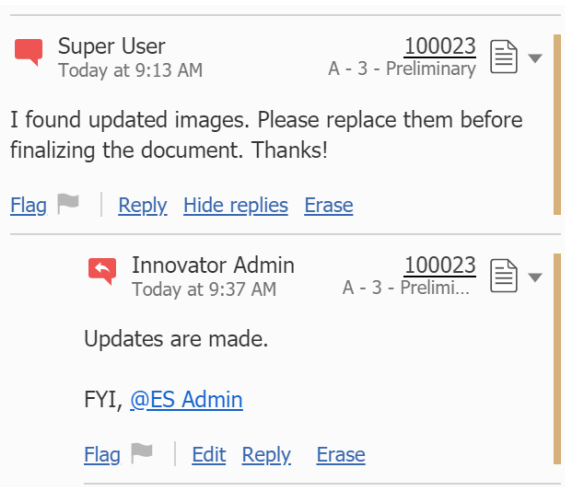
10.4 Display of Messages

Use the scroll keys to scroll up and down to the bottom of the displayed messages. Click on **Show more messages** in the footer of the discussion panel to display more messages. When all the messages have been displayed, the footer of the discussion panel indicates **There are no more messages**.

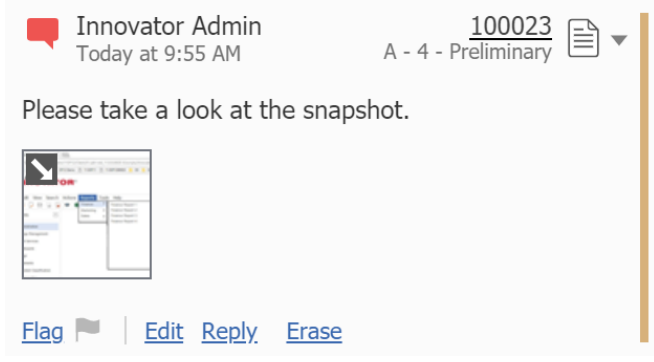
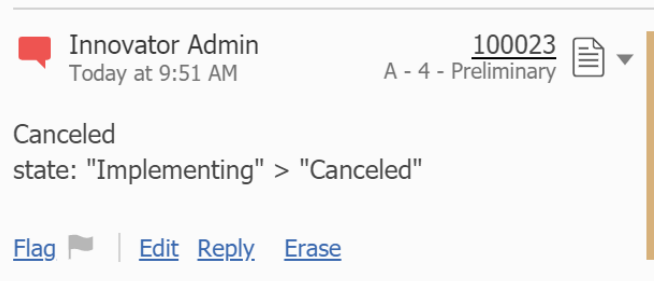


10.5 Message Types

There are different possible message types that can be posted within the Discussion panel comment box.

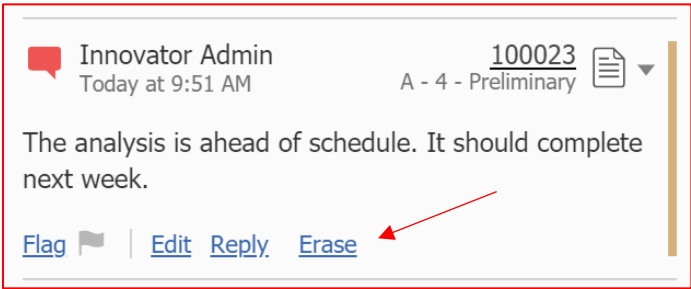
Message Classification	Description
Text Messages	<p>A comment/reply to a message with only text. For more information on Text messages, refer to section 10.2.</p>  <p>The screenshot shows a message from 'Innovator Admin' sent 'Today at 9:51 AM'. The message content is 'The analysis is ahead of schedule. It should complete next week.' The message is associated with document '100023' and is part of 'A - 4 - Preliminary'. Action buttons include 'Flag', 'Edit', 'Reply', and 'Erase'.</p>
Text messages with @mention	<p>The @mention feature enables you to directly and easily notify another user about a comment added to a collaboration discussion. Enter the @username into the comment to include it in the target user's discussion feed even if the user is not directly following the item. If notification is enabled, they will receive a notification as well.</p>  <p>The screenshot shows two messages. The first is from 'Super User' sent 'Today at 9:13 AM' with the text 'I found updated images. Please replace them before finalizing the document. Thanks!'. The second is from 'Innovator Admin' sent 'Today at 9:37 AM' with the text 'Updates are made. FYI, @ES Admin'. Both messages are associated with document '100023' and are part of 'A - 3 - Preliminary'. Action buttons include 'Flag', 'Reply', 'Hide replies', and 'Erase'.</p>



Message Classification	Description
Snapshot Messages	<p>A comment/reply to a message with a snapshot. It may or may not include text. The thumbnail image in the message can contain markup information. Clicking the expand arrow in the upper left will make the image bigger for review purposes. Note that if you hover the mouse over the image, it will include information regarding which page number of the document the snapshot is from.</p>  <p>The screenshot shows a message from 'Innovator Admin' at 'Today at 9:55 AM' with a document icon and ID '100023'. The text says 'Please take a look at the snapshot.' Below the text is a small thumbnail image of a document page. At the bottom are links for 'Flag', 'Edit', 'Reply', and 'Erase'.</p>
Automatic Messages	<p>Automated messages are created by history updates to the item. These message types and content are configurable by admin only.</p>  <p>The screenshot shows an automatic message from 'Innovator Admin' at 'Today at 9:51 AM' with a document icon and ID '100023'. The text says 'Canceled state: "Implementing" > "Canceled"'. At the bottom are links for 'Flag', 'Edit', 'Reply', and 'Erase'.</p>

10.6 Message Functions

Once you enter a comment in the comment box, it appears as a message within the discussion panel. At the bottom of each message are message functions.

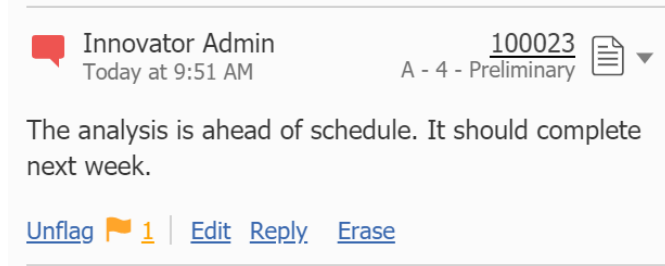


10.6.1 Flagging a Message

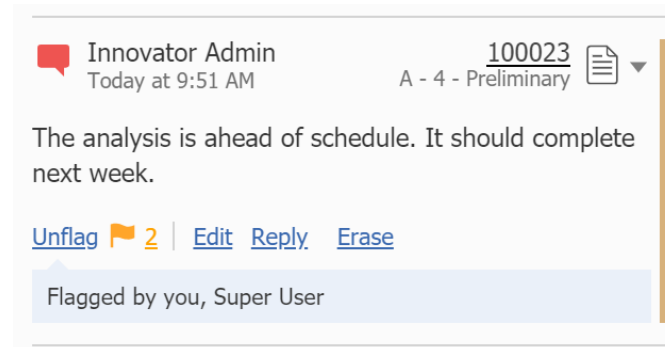
A user can flag or unflag any message within the discussion panel.

To flag a message, click on the **Flag** link. The flag changes its color from grey to yellow to indicate the message is flagged by a user.

To unflag a message, click on the **Unflag** link.



Click on the number hyperlink to open a display of the people who have flagged the message. This is shown in the following figure:



The Following example in the table describes various states of the Flagging functions:

Flag State	Meaning
Flag	No user has flagged the message, including the creator of that message.
Flag 1	Six users have flagged the message but not the creator.
Unflag 2	Seventeen users including the creator have flagged the message.

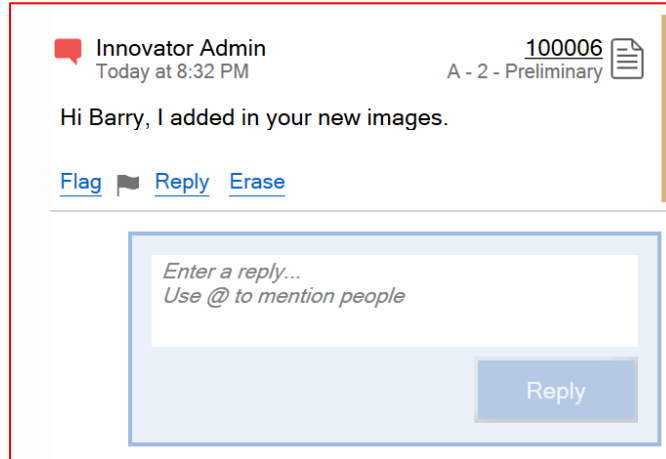
10.6.2 Entering a Reply

You can reply to a comment or to the existing messages within the discussion panel.

To reply to a comment, do the following:

1. Click on the **Reply** link below the message. This opens a **Reply Box**.
2. Type in the required text in the **Reply Box**.

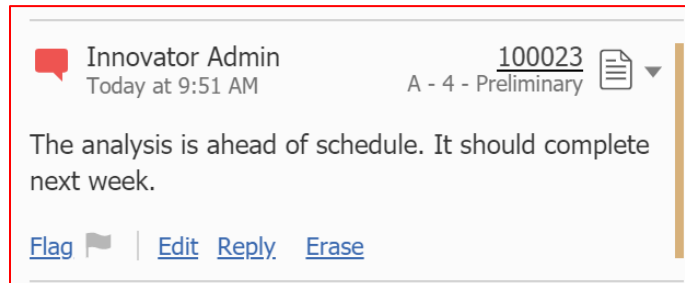
3. Click the **Add Reply** button to post the reply.
Once the reply is posted, it appears underneath the corresponding message.
Reply messages are shown indented and have an icon with an arrow.
4. Click on **Hide replies** to hide the reply from the message list and **Show replies** to show the reply again.



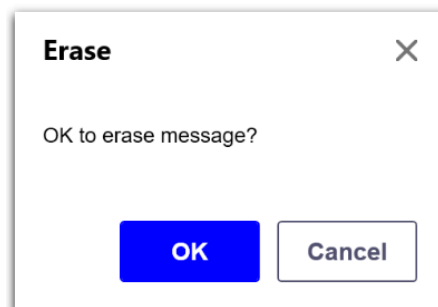
10.6.3 Erasing a Message

Any existing message can be erased only by the creator of the message or by an administrator. To erase a message, do the following:

1. Click on the **Erase** link found below the message that needs to be erased.

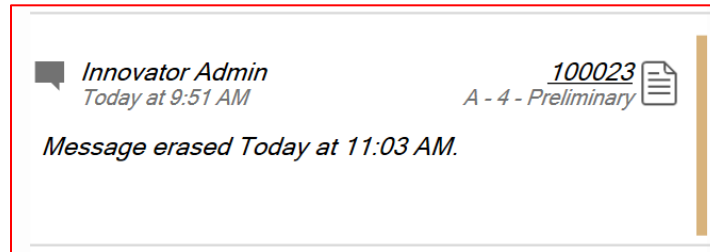


2. This opens a dialog box which prompts you **OK to erase message?**



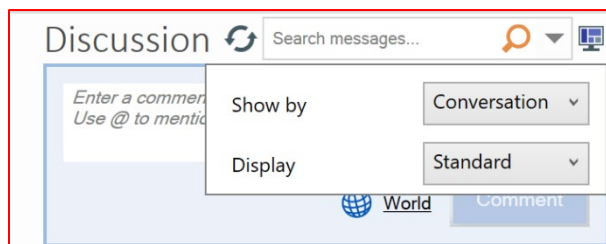
3. Click **OK** to delete the message or **Cancel** to exit from this dialog box.

- Once the message is erased, new text appears in place of the removed text. The context of the message is **Message erased <date and time>**.



10.7 Message Sorting Options

The Discussion Panel provides a selector for the user to select the sorting option.



There are three kinds of message sorting options:

- **Conversation** - This is the default sorting mode. Messages are sorted by the time the message was posted. The most recent message is on top. Determination of “recent” is based on the time of the message itself (if no replies) or the most recent reply. The messages are displayed in a **threaded** style.
- **Thread Date** - Messages are sorted by date with the most recent on top. Determination of “recent” is based only on the time of the message itself, not on any replies. The messages are displayed in a **threaded** style.
- **Message Date** - Messages are sorted by date with the most recent on top. Determination of “recent” is based only on the time of the message itself, not on any replies. The messages are displayed in a **flat** style with all replies listed at the same level as Comments.

10.8 Message Search and Filtering Options

The Discussion toolbar contains options to easily search and filter the messages using various criteria.

There are two ways of performing a message search in the Discussion toolbar.

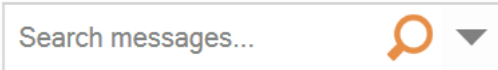
10.8.1 Basic Search

Basic searching, which searches on message text only, is provided directly in the toolbar.

To perform a basic search of messages, do the following:

1. Type in the required text in the search entry box.
2. Click on the **Search** button on the left side of the box to execute the search.
3. All the messages containing the search text are populated within the discussion panel.

4. Scroll down to the bottom to find all the messages displayed in the discussion panel.

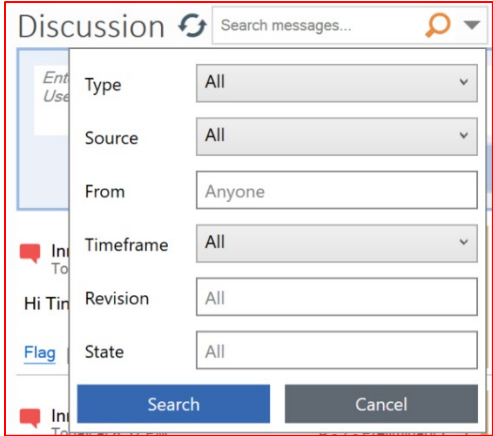


10.8.2 Advanced Search

Advanced Search, which searches on the values entered by the user in the filtering option provided.

To perform an advanced search of messages, do the following:

1. Click on the ▼ button in the search entry box of the discussion toolbar. This opens a floating window below the search box.



Filtering Criteria	Filtering Options
Type	<p>Message search is based on the message type:</p> <ul style="list-style-type: none"> ○ All comments ○ Text comments only ○ Snapshot comments only ○ Audio comments only ○ Video comments only ○ Automated messages only <div style="margin-left: 40px;"> </div>



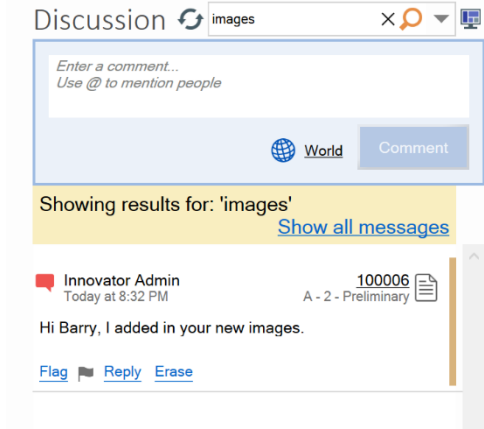
Filtering Criteria	Filtering Options
Source	<p>Message search is based on the message source:</p> <ul style="list-style-type: none"> ○ All ○ This item only
From	<p>Message search based on the message creator.</p>
Timeframe	<p>Message search based on the Timeframe when the message was created. There are two options:</p> <ul style="list-style-type: none"> ○ Within the last - allows the user to specify a number and a time value (Minutes, Hours, Days, or Months). <div style="margin-left: 20px;"> </div> ○ Date range - This allows the user to specify two dates. <div style="margin-left: 20px;"> </div>
Revision	<p>Message search is based on the Revision value of the item.</p>
State	<p>Message search is based on the name of the state of the item.</p>

2. Enter values in any of these filtering criteria.
3. Click on **Search** to execute the search to display the filtered messages.
4. Click on **Cancel** to close the Search window.

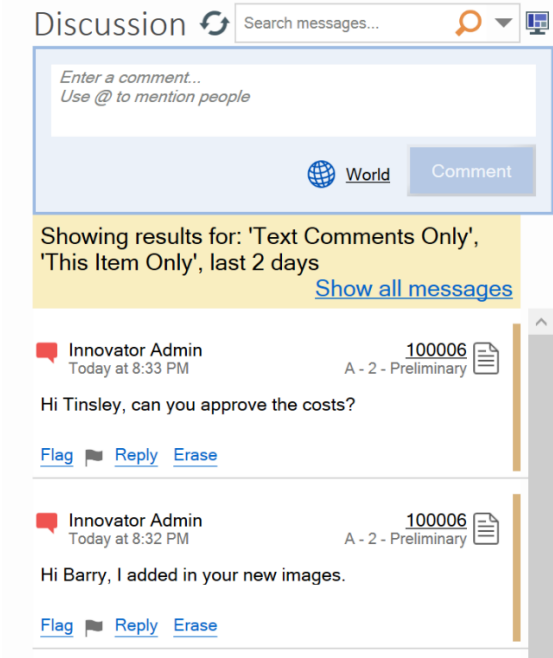
10.8.3 Indication of Filtering

When you apply the search filters, the Discussion Panel clearly indicates that these are the filters that are applied. This allows you to understand that you are not looking at all results.

For a basic search on messages, the indication of filtering looks like:



For an advanced message search, the indication of filtering looks like this:



A yellow bar appears below the Discussion toolbar and displays the current filtering criteria. Click on **Show all messages** to return the Discussion Panel to its normal unfiltered state.

