

Aras Office Productivity Connector 27 Installation Guide

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Aras Corporation
100 Brickstone Square
Suite 100
Andover, MA 01810
Phone: 978-691-8900

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1 Overview

This document provides detailed instructions for installing the Aras Office Productivity 27 integration between Aras Innovator and Microsoft Office. The steps described in this document are intended to allow a novice administrator to install Aras Office Productivity Connector 27. However, more general knowledge of system administration, network deployment, and Aras Innovator administration is recommended.

These are the basic steps to fully install the Aras Office Productivity Connector 27.

1. Install Aras Innovator.
2. Install Aras Office Connector components in Aras Innovator.
3. Install Aras Office Productivity Connector 27 components to Microsoft Office.

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

2 Installing Aras Innovator

The first step in installing Aras Office Productivity Connector is to set up the Aras Innovator instance that will be used. This section describes the three major steps for setting up your Aras Innovator instance with Aras Office Productivity Connector 27.

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.

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

At the time of release, the following version of Aras Innovator is supported by the Aras Office Productivity Connector 27:

- Aras Innovator 27

If using an earlier version of Aras Innovator, please upgrade before installing the Aras Office Productivity Connector 27.

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

2.2 Confirming the Aras Innovator Installation

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

1. Log in to Aras Innovator as an administrator.
2. Click the **User** icon in the top-right corner and select **About**.
3. Confirm that the dialog shows **Release 27**.
4. Close the dialog.
5. From the **TOC**, expand **Administration** and select **Variables**.
6. Confirm that the following variables are listed:

Version Major	Version Minor	VersionServiceUpdate	VersionLabel
14	0	15	Release 27

2.3 Feature License Key

Aras Office Productivity Connector 27 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. From the TOC, expand Administration and select Feature Licenses.
3. The Aras Office Productivity Connector 27 is activated with the **Aras.OfficeProductivityConnector** Feature License. If a feature license is found, check the expiration date to confirm it is still active.

2.3.1 Requesting a Feature License

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

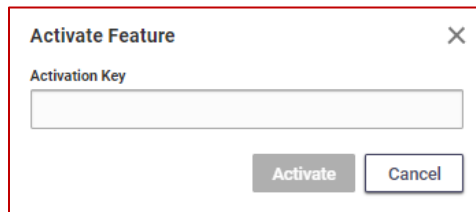
- Subject: Aras Office Productivity Connector Activation Key Required
- Body: Version of Aras Innovator

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

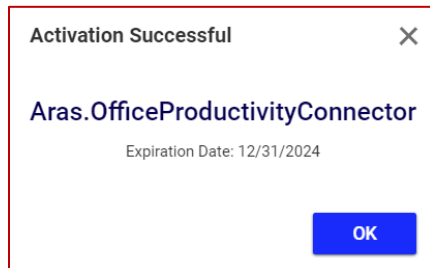
2.3.2 Installing the License

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

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



3. Paste the acquired activation key and click the **Activate Feature** button.
A success message similar to the following will appear.



3 Installing Aras Office Connector Server Components

Once the installation of Aras Innovator is complete and confirmed, the Aras Innovator database must be modified with the metadata required to run the Aras Office Productivity Connector 27. Before applying these changes, confirm that all required components are present.

- Aras Innovator 27
- Aras Office Productivity Connector Feature License
- Aras Update Tool 1.23
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 that they should log out before the process starts.

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 Code Tree.

The “Code Tree” refers to files and folders installed on the disk when Aras Innovator was first installed.

The default path for the Code Tree installation would be something like:

C:\Program Files (x86)\Aras\Innovator

With the following contents:

Name	Type	Size
AgentService	File folder	
ConversionServer	File folder	
DB	File folder	
Innovator	File folder	
OAuthServer	File folder	
SelfServiceReporting	File folder	
Tools	File folder	
VaultServer	File folder	
ConversionServerConfig	XML File	1 KB
InnovatorServerConfig	XML File	2 KB
SelfServiceReportConfig	XML File	1 KB
VaultServerConfig	XML File	1 KB

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

- a. From the Windows search field, enter **Control** to access the **Control Panel**.
- b. Select **Programs and Features**.
- c. Right-click the **Name** column and select **More...**
 - i. Select the **Comments** header if it has not been checked.
 - ii. Click **OK**.
- d. Search for the **Aras Innovator** entry in the **Programs and Features** window.

- e. View the value set in the **Comments** column for the Aras Innovator entry:

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

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

3. Disconnect all users from the database.

The easiest way to prevent client sessions from committing any further changes to the database is to change the database connection string in the `InnovatorServerConfig.xml` from `<DB-Connection...` to `<xDB-Connection...` and restart the **w3svc service (IIS)**. This expires all sessions and prevents all new connections to the Aras Innovator database through the existing instance.

4. Backup the database.

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

5. Enable database connections.

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

3.2 Installing Aras Office Productivity Connector 27

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

Aras Office Productivity Connector 27 can be installed using the Automated Installation Option (using the **Aras Update** Tool) or the Manual Installation Option (using the **Aras Import** Tool).

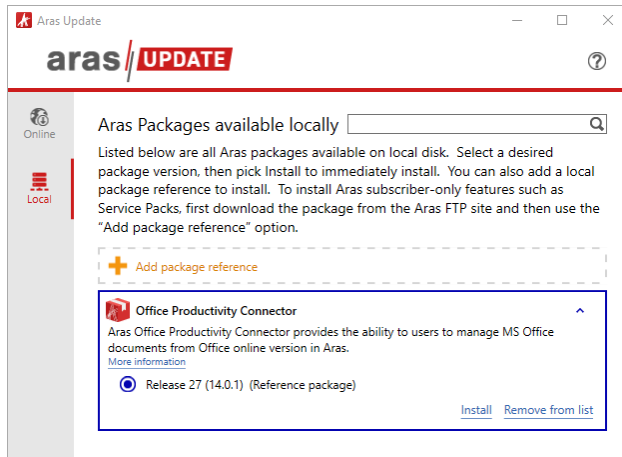
3.2.1 Automated Installation Option

1. Download the Aras Office Productivity Connector 27 CD Image from the [Aras FTP](#) site and unzip the file on the local computer.
2. Enable the **Super User** login.
3. Launch the **ArasUpdate.exe** file as administrator.

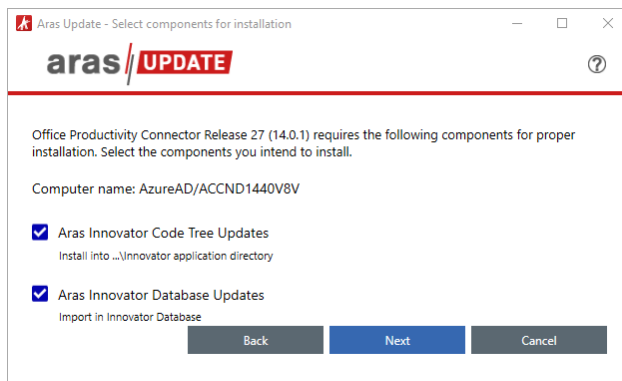
If default options were selected during installation, the **ArasUpdate.exe** file can be found in the `C:\Program Files (x86)\Aras\Aras Update\` directory.

4. On the **Local** tab, click **Add package reference** and navigate to the folder where the Aras Office Productivity Connector 27 package was extracted from the first step.

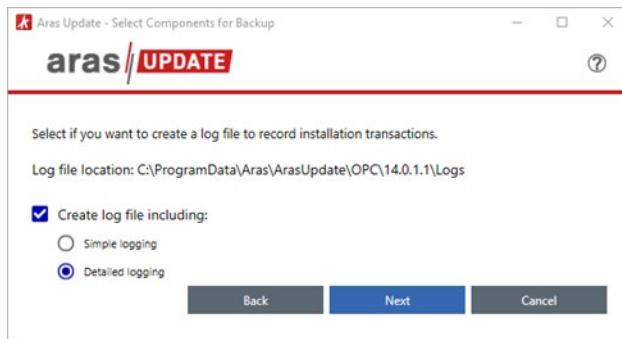
5. Expand the Aras Office Productivity Connector package and click **Install**.



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

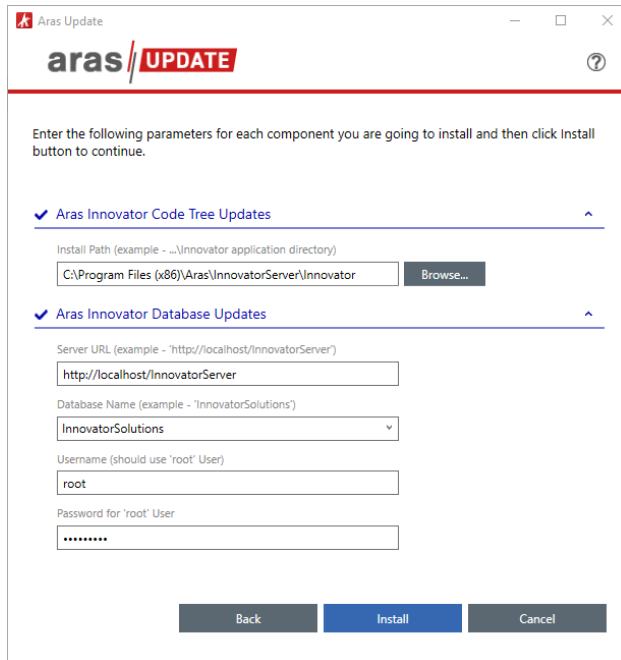


7. Select the **Detailed logging** option and click **Next**.



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

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



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

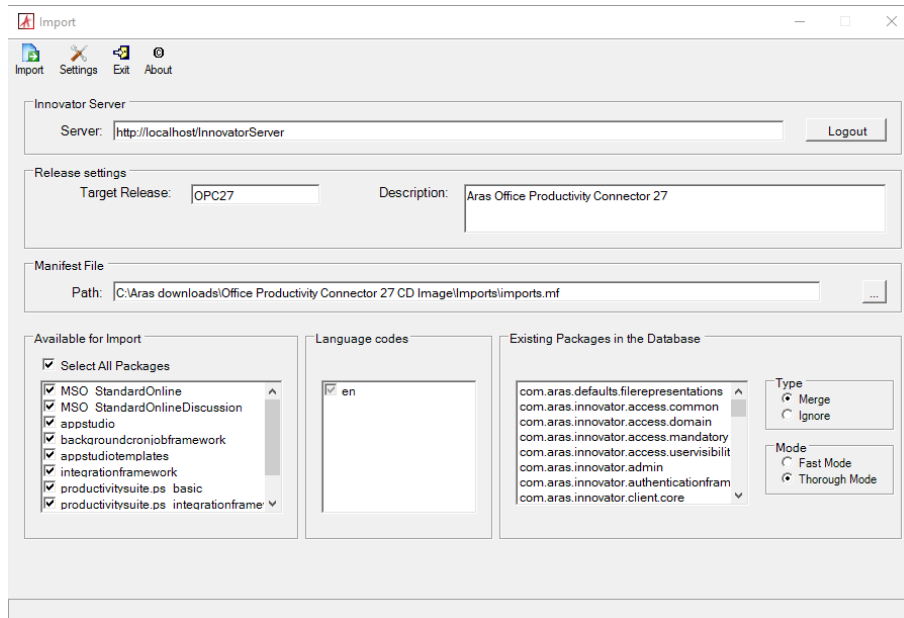
Aras Update will import everything required for Aras Office Productivity Connector 27.

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

3.2.2 Manual Installation Option

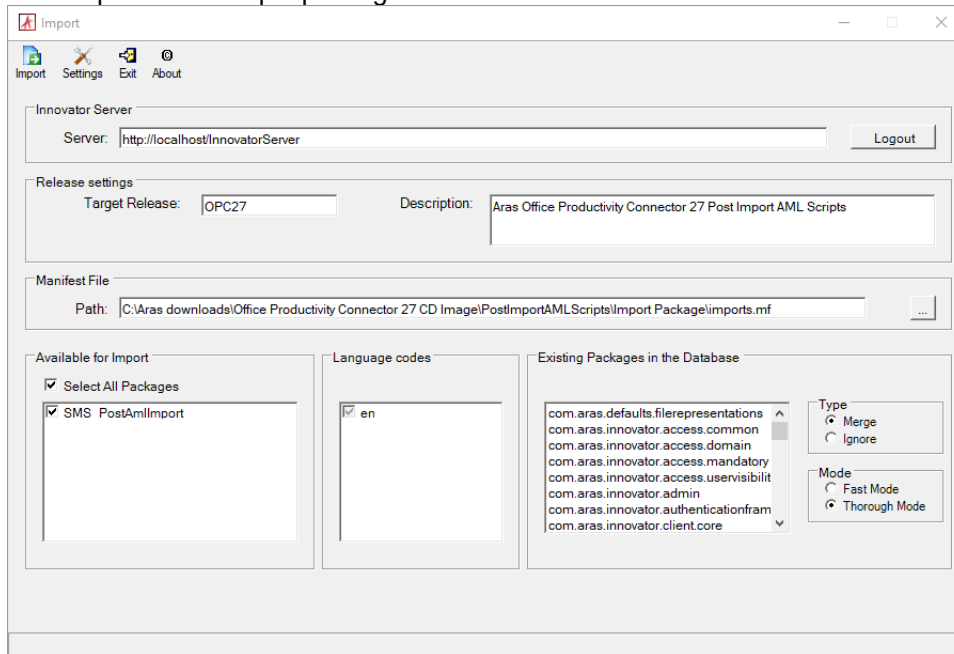
1. Download the Aras Office Productivity Connector 27 CD Image from the [Aras FTP](#) site and unzip the file on the local computer.
2. Copy DLLs from the `..\Files\Innovator\Server\bin` folder to the `Innovator\Server\bin` folder and update `method-config.xml`.
3. Copy content from the `..\Files\Innovator\Client` folder to the `Innovator\Client` folder.

4. Use the Package Import Export Utilities to import the Aras Office Productivity Connector 27 database package. For more information about using this tool, please see the Aras Innovator 27 – *Package Import Export Utilities* documentation.
 - a. Enable the **Super User** login to perform this step.
 - b. Browse to the `\PackageImportExportUtilities\Import\` folder and run the **Import.exe** file as administrator.



- c. Enter the following information:
 - **Server:** The connection URL for Aras Innovator
 - **Database:** The target Aras Innovator database
 - **Username:** root
 - **Password:** Password for “root” login (Default is “innovator”)
 - **Target Release:** OPC27
 - **Description:** Aras Office Productivity Connector 27
 - **Manifest File Path:** The manifest file `\Office Productivity Connector 27 CD Image\Imports\imports.mf`
 - **Available for Import:** Select All Packages
 - **Type:** Merge
 - **Mode:** Thorough Mode
- d. Click the **Import** button.

5. Use the **Package Import Export Utilities** to import the Aras Office Productivity Connector 27 Post Import AML Scripts package.



- a. Enter the following information:
 - **Server:** The connection URL for Aras Innovator
 - **Database:** The target Aras Innovator database
 - **Username:** root
 - **Password:** Password for “root” login (Default is “innovator”)
 - **Target Release:** OPC27
 - **Description:** Aras Office Productivity Connector 27 Post Import AML Scripts
 - **Manifest File Path:** The manifest file \Office Productivity Connector 27 CD Image\PostImportAMLScripts\Import Package\imports.mf
 - **Available for Import:** Select All Packages
 - **Type:** Merge
 - **Mode:** Thorough Mode
- b. Click the **Import** button.

3.3 Configure Aras Office Productivity Connector 27 Redirect URL

1. Navigate to the Aras Innovator Code Tree.
2. Open the /Innovator/OAuthServer/OAuth.config file for editing.
3. Add a redirect URL for Aras Office Productivity Connector under the **redirectUri** section of the file.

```
<redirectUri value='https://{InnovatorURL}Client/Solutions/OfficeProductivityConnector/taskpane.html?redirect=loginSuccess' />
```

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

3.4 Confirming the Installation

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

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

Office Productivity Connector
14.0.1

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

4 Installing the Aras Office Productivity Connector 27 Client Components

Aras Office Productivity Connector 27 must modify Microsoft Office to add the integration components. Before applying these changes, confirm that the installation of Microsoft Office meets the minimum requirements to run the Aras Office Productivity Connector 27 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

4.1.1 Install Aras Office Productivity Connector 27 for Organization

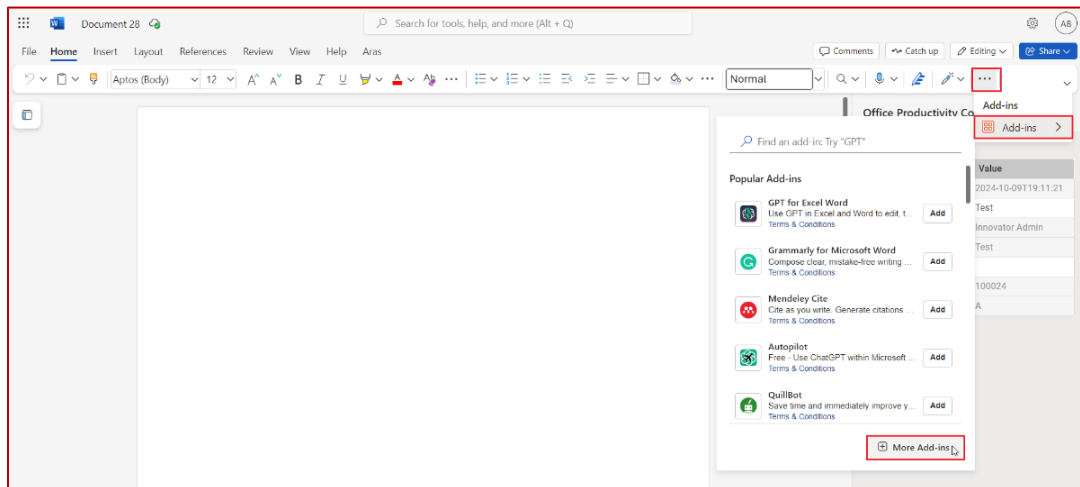
Aras Office Productivity Connector 27 can be deployed for use by an organization through the Microsoft 365 Admin Center. Please refer to the following Microsoft documentation: [Deploy add-ins in the Microsoft 365 admin center](#).

When prompted, select the **Upload custom apps** option and upload the Aras Office Productivity Connector 27 manifest files.

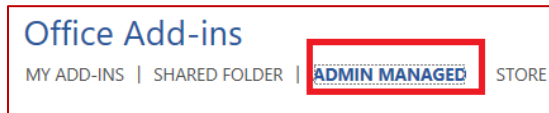
4.1.1.1 Client Installation

Enable the Aras Office Productivity Connector 27 add-in

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



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

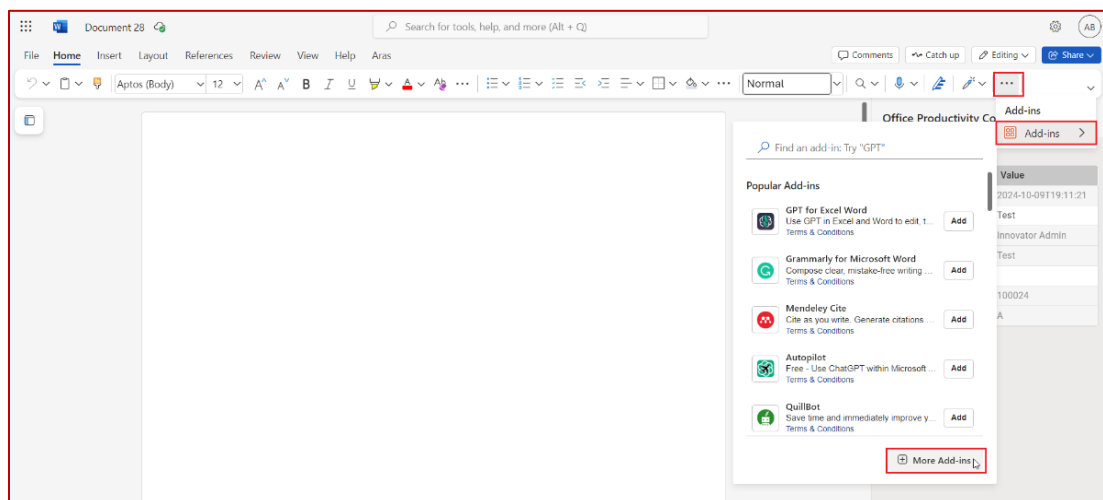


5. Select the **Aras** add-in and click **Add**. This will enable the application to use the Aras Office Productivity Connector.
6. Repeat steps one through five for each Office application that will use Aras Office Productivity Connector.

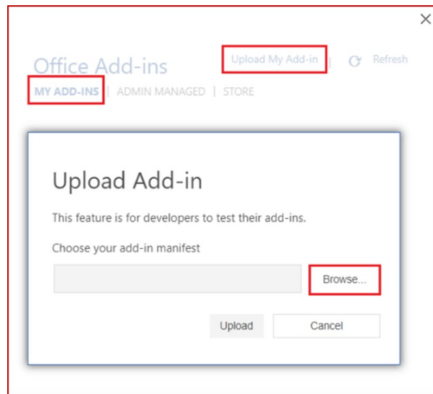
4.1.2 Install Aras Office Productivity Connector 27 for Microsoft Online Applications Single User

To install Aras Office Productivity Connector 27 for a single user profile:

1. Open the `ArasOfficeProductivityConnector_Copy.xml` from the `/Innovator/Client/Solutions/OfficeProductivityConnector/Manifest` folder.
2. Replace all instances of `{Innovator.URL}` with the URL for the Aras Innovator instance being used.
3. Save and close the `ArasOfficeProductivityConnector_Copy.xml` file.
4. Navigate to Microsoft Office online.
5. Create a new document (e.g., New Word document).
6. Click on the **ellipsis (...)**, **Add-ins**, and **More Add-ins**.



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



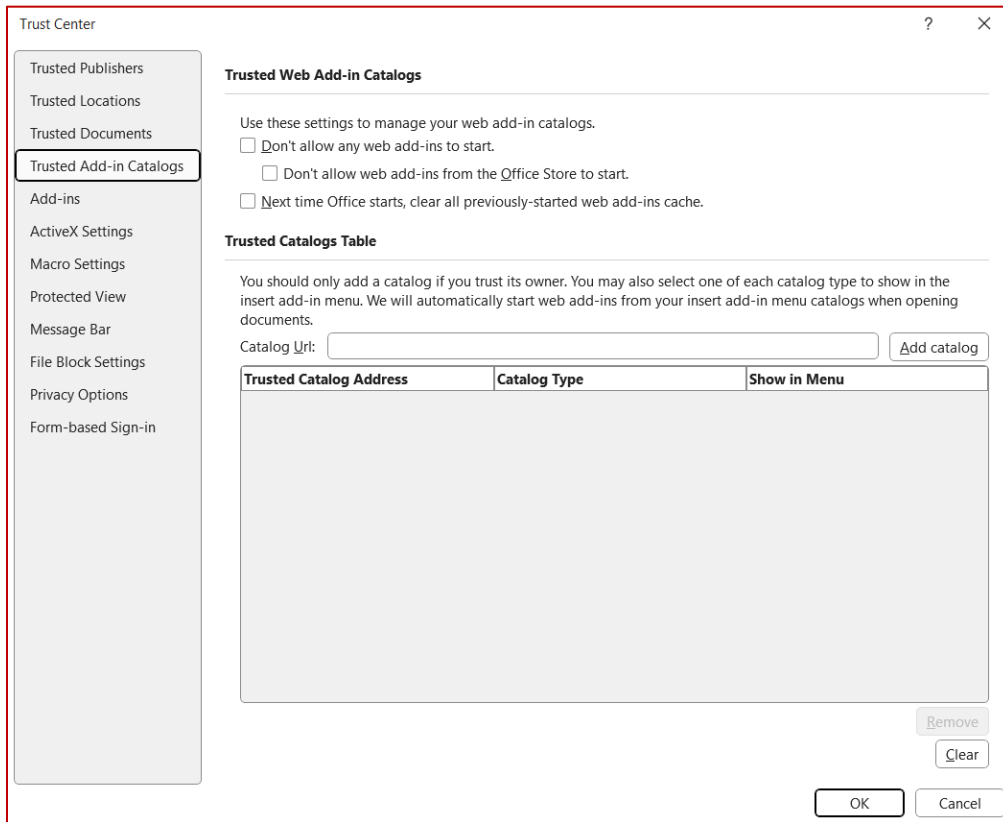
8. Select the manifest file from Step 3 and click **Upload**.

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

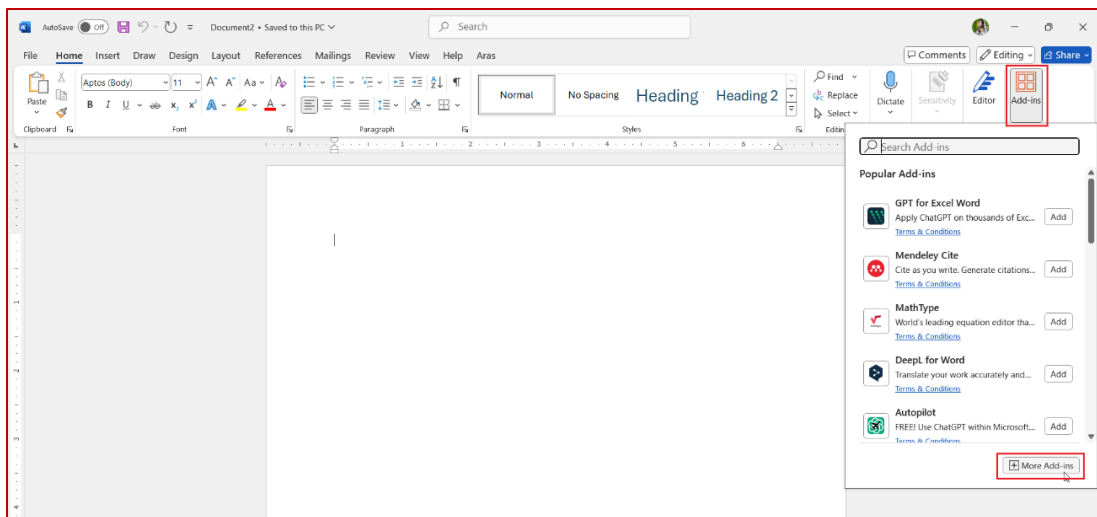
4.1.3 Installing Aras Office Productivity Connector 27 for Microsoft Desktop Applications

1. Copy the `ArasOfficeProductivityConnector_Copy.xml` from the `/Innovator/Client/Solutions/OfficeProductivityConnector/Manifest` folder of the Aras Office Productivity Connector 27 CD Image to an alternative location.
2. Open the `ArasOfficeProductivityConnector_Copy.xml` for editing.
3. Replace all instances of `{Innovator.URL}` with the URL for the Aras Innovator instance being used.
4. Save the `ArasOfficeProductivityConnector_Copy.xml` file.
5. Open Microsoft Office desktop application (e.g., Word).
6. From the **File** menu, select **Options**, **Trust Center**, and **Trust Center Settings**.

7. Select Trusted Add-in Catalogs.



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

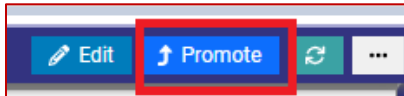


13. Click **Shared Folder**.
14. Click **Refresh**.
15. Select the **Office Productivity Connector Add-in** and click **Add**.

5 Installing Aras Office Productivity Connector 27 SharePoint Integration (Optional)

5.1 Publish SharePoint Integration

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



6 Post Installation

It is recommended to review the *Aras Office Productivity Connector 27 – Administration Guide* document after the installation is complete. To use all features, additional changes to the **Document Form** and **Document Class Structure** may be required.

For end-users, the *Aras Office Productivity Connector 27 – User Guide* is available from the `Documentation` folder of the Aras Office Productivity Connector 27 CD Image. Additionally, the online help can be referenced from the Aras Ribbon in Office or directly at <https://www.aras.com/help/office/14-0-4>.