ACE 2024

STUDENT TRAINING GUIDE

Using Office Connector

aras

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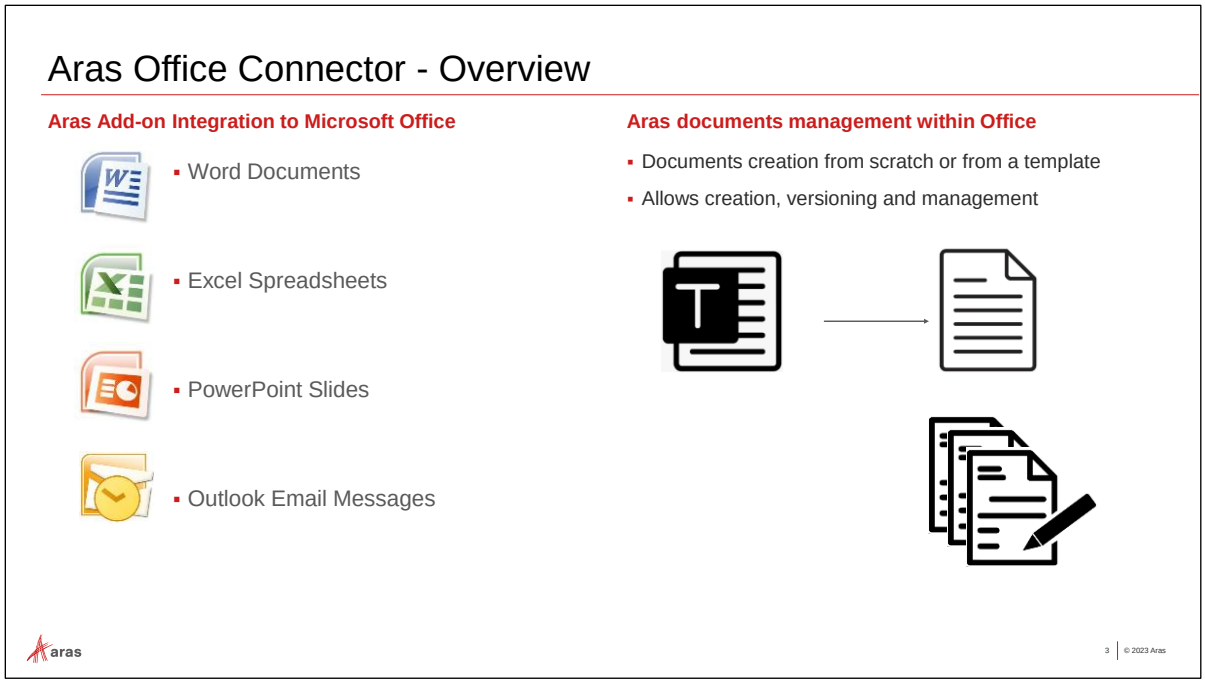
Using Office Connector

Overview

In this session, you learn how to use the Aras Office Connector add-on, which is available to all users with a subscriber license. The Office Connector provides a convenient way to manage office files including Microsoft® Word documents, Excel spreadsheets, PowerPoint presentations, Visio diagrams, and Outlook e-mail messages. You work directly in the Microsoft Office authoring tools to create and edit office files that are automatically vaulted in Aras Innovator.

Objectives

- Use Aras Office Connector to create and save Aras Innovator Documents
- Link Office Connector documents to Aras Innovator items
- View multiple document versions
- Discover new and enhanced functionalities using Office Connector versions R14-R27

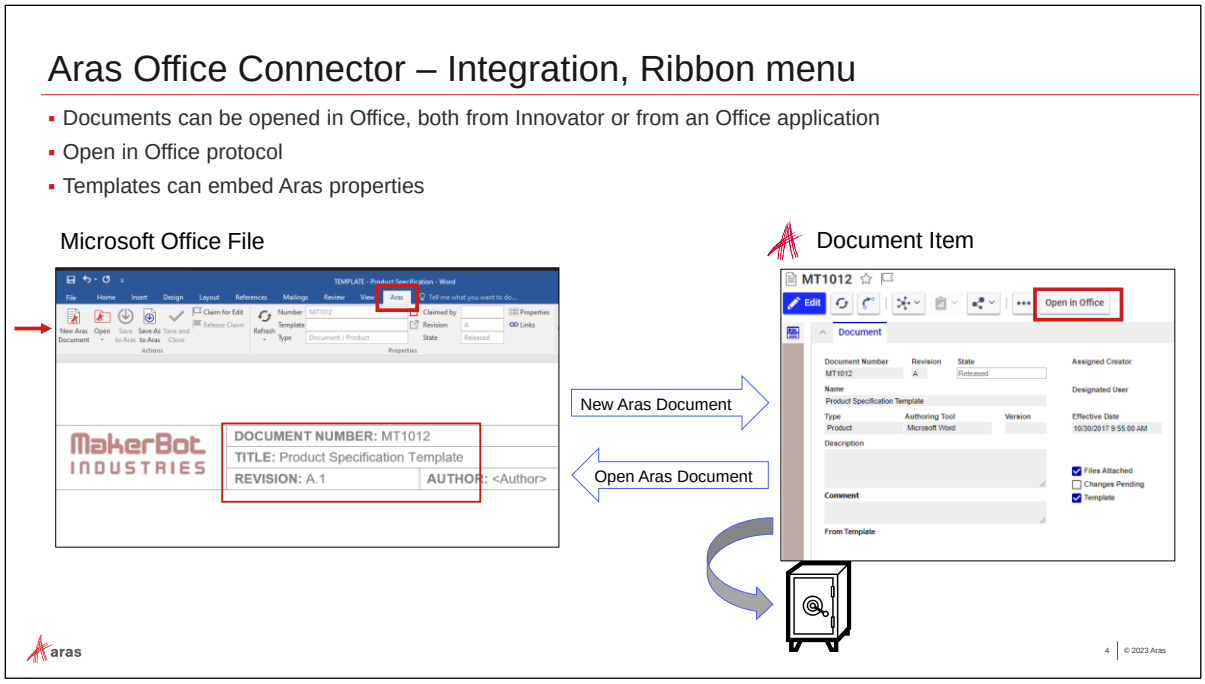


Aras Office Connector – Overview

Aras Office Connector facilitates your work with Microsoft Office Files including Word, Excel, PowerPoint, Visio, and Outlook. As you work in the native Office authoring environment, Office Connector automates and streamlines the correlation to the Aras Innovator database. Office Connector enables you to do the following:

- Search to find documents and templates in the Aras Innovator database from within the native Office applications
- Create new documents within Office, either from scratch or from a template
- View documents for read-only access or claim to edit and modify a file
- Auto-generate PDFs of saved files
- Automate file naming and document number sequencing
- Create relationships between Microsoft documents and Aras Innovator Items such as Parts, Drawings, Projects, Process Plans, and other Items while using Microsoft Office applications
- Configure revision and version control on Microsoft files to provide traceability and assure that users always work with the correct version of a file
- Map properties from native Microsoft files to Aras Innovator, or from Aras Innovator to the native Microsoft files

An Administrator must install the Office Connector client software provided by Aras to allow access to the integration features as well as the appropriate packages on the Aras Innovator server. See the *Aras Office Connector Installation Guide* for more information.



Aras Office Connector – Integration, Ribbon menu

Each time you save a Microsoft Office file to Aras Innovator, it is automatically associated to an Item and stored in an Aras Vault. You can access the saved file in Aras Innovator by searching and opening the Item that is related to the file. The Office Connector is preconfigured to work with the standard Document ItemType, but an Administrator can associate the file to any valid ItemType.

As illustrated above, a new document item is created when you create a new Word document and save it to Aras Innovator using the Office Connector. The Word file is related to the document item and copied to an Aras Vault.

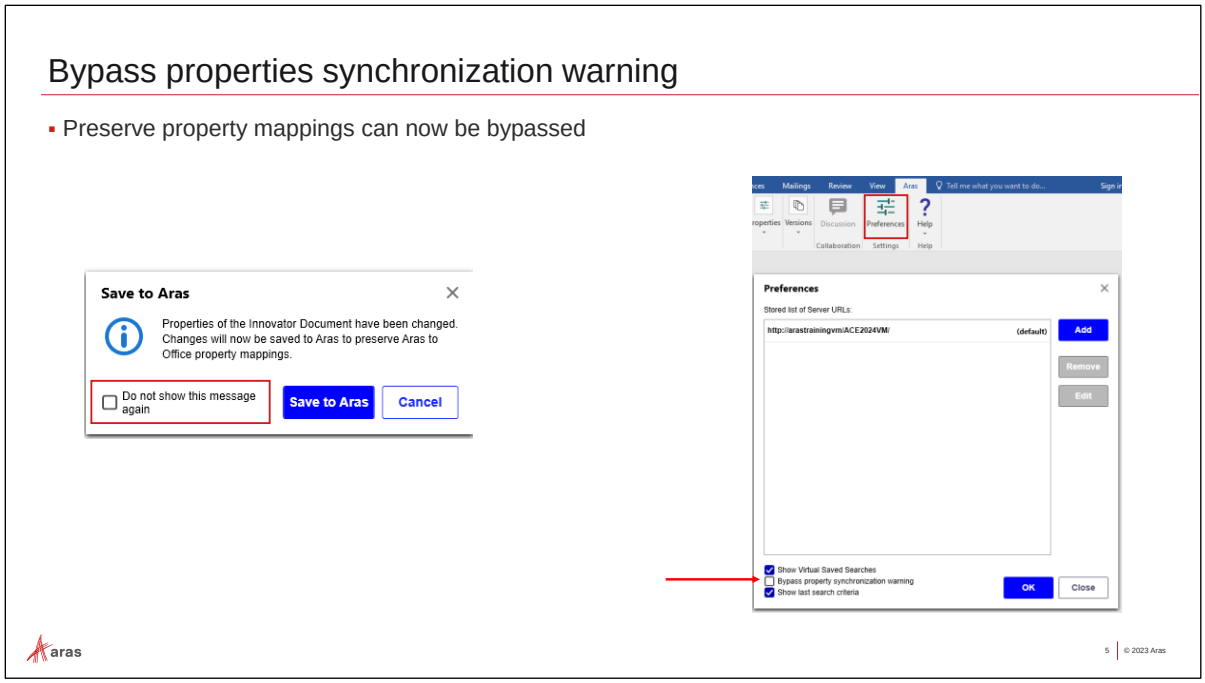
While the file is being edited locally, a copy is retained in the user's home directory in a subfolder named *OfficeConnector*. The Administrator can configure it to keep the local copy or remove it after saving it to the Aras vault.

Office Connector also supports the automated creation of PDF viewable files when an Office file is saved and closed. An Administrator can reconfigure this behavior to generate PDFs on each save if desired.

Documents can be opened in Office, either from Aras Innovator or from an Office application:

- From Office applications: using the "Open" button in the Aras tab
- From Aras Innovator: using the "Open in Office protocol" button

You can create standardized Office document templates that comply with corporate conventions and are ready-to-use for end users. Templates can be created which allow mapping properties to and from Microsoft Office applications to the defined ItemTypes in Aras Innovator.



Bypass properties synchronization warning

When opening a document using Office Connector, a “Save to Aras” popup window will dialog informing you that Aras will preserve the Office property mappings. You can bypass seeing this message by selecting “Do not show this message again” and clicking Save to Aras. In addition, users can now set their Office Connector Preferences and select Bypass property synchronization warning.

The first time the Office Connector accesses the Aras Innovator server in an Office session, you are prompted for login credentials. First, choose the server you want to access. Then, if there is more than one, select the appropriate database.

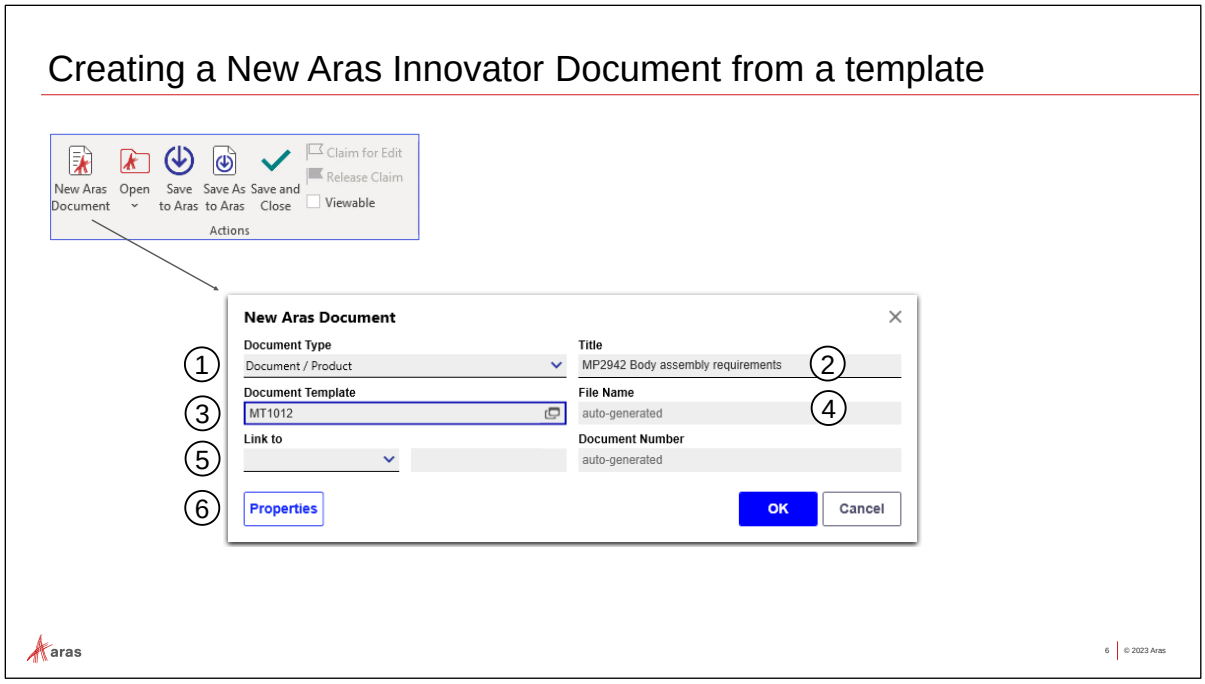
Once you log in, your credentials are saved for the current session. If you close the Office application and return later, you will need to log in again.

If your Administrator has configured Aras Innovator to use an alternate windows authentication (e.g., single sign-on) you are not required to enter a login name or password.

Try it … Open a Document in Office, from Aras Innovator

1. Login to Aras Innovator as Mike Miller (login: mmiller / password: innovator).
2. In the TOC, go to Documents > Documents.
3. Open **MT1012** document.
4. Click on ‘Open in Office’ button and select Open in the warning dialog window.
5. In the popup window, check the “Do not show this message again” box, then click *Save to Aras*.
6. Ignore the “you have insufficient permissions” warning message.
7. In the Aras menu, open Preferences. Verify that “Bypass property synchronization warning” is now checked. Close the Preferences window.

The opened document is a specification template for the company products. Next, we will create a document instance from that template.



Creating a New Aras Document from a template

You can create a new Aras Innovator Document and corresponding Office file using the New Aras Document action. You can define the document using the following fields.

①	Document Type	Choose from the list of supported Document Types configured by the Aras Innovator Administrator. The selected Document Type drives the behavior of the other options.
②	Title	Enter a title for your Document. This is stored as the Aras Document Title Property and set as an Office property too.
③	Document Template	Choose from the list of templates configured for the Document Type selected. Administrators can set visibility to Released templates only.
④	File Name	If prompted, the name of the Office file to be saved. An Administrator can also configure a Document Type to automatically name the file. The file is temporarily saved in a subfolder named *OfficeConnector*.
⑤	Link To	Choose from a list of Link To ItemTypes configured by the Administrator. **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. You can select the specific item in the provided field.
⑥	Properties	Enter values for properties configured by the Aras Innovator Administrator to be saved with the document.

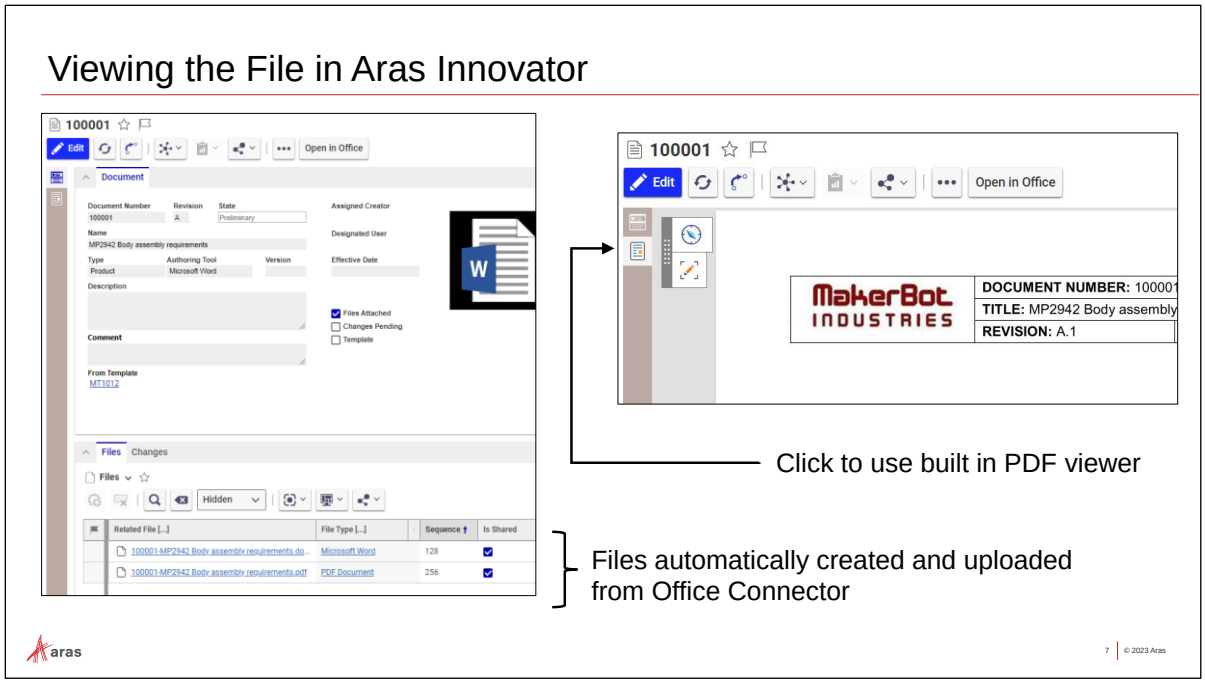
Try it … Create A New Aras Document from a template

Office Connector allows creation of documents, both from scratch and from a template. We will create a new document from a released template.

1. On the Aras tab in Word, click *New Aras Document*.
2. Select the Document / Product Type.
3. In the Document Template field, click on the search button.

4. Search and select **MT1012** (Product Specification Template). Click OK.
5. Modify the title as follows: *MP2942 Body assembly requirements*.
6. Click OK.
7. Notice that the title is now populated in the document body.
8. Notice that the document number, revision, and other Aras properties are not yet synchronized. On the Aras tab, click *Save to Aras* and observe the automatic fields population.
9. Click *Save and Close* when finished editing. Click OK when prompted to confirm.

Upon clicking Save to Aras, the file is saved to Aras Innovator. The Office file is copied to an Aras Vault and associated with an Aras Innovator document item. The corresponding document item is claimed to prevent other users from editing the document. Clicking Save and Close is equivalent to clicking Done in Aras Innovator itself.



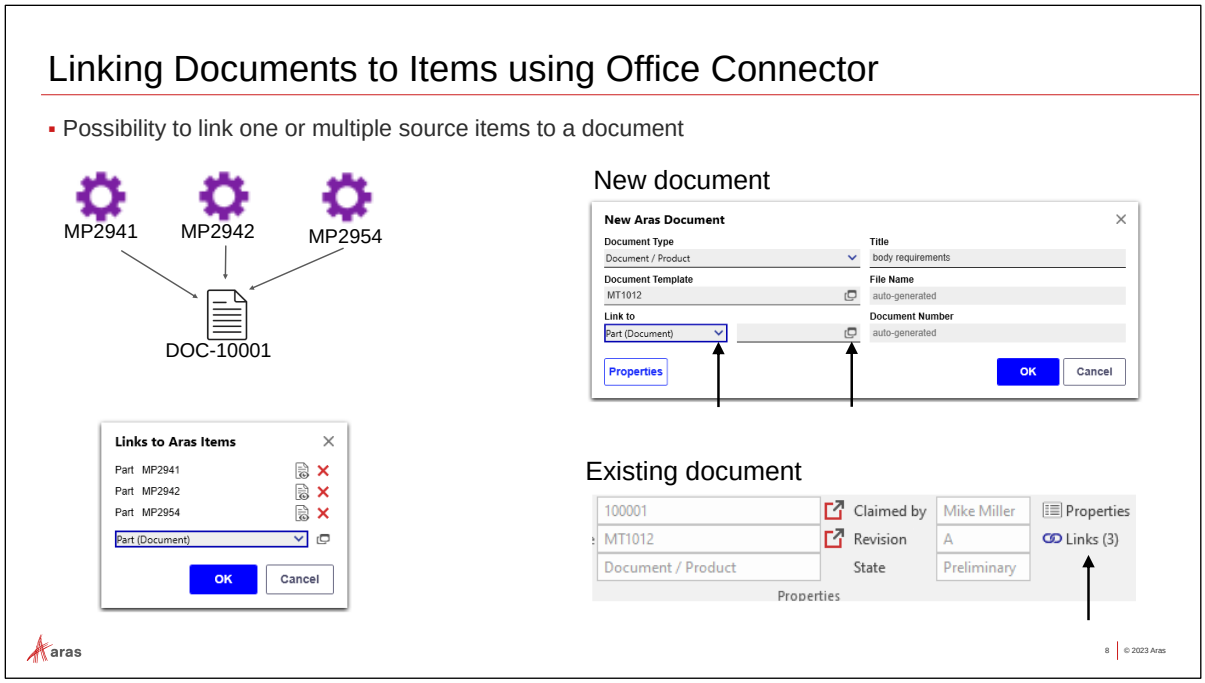
Viewing the File in Aras Innovator

Office Connector can be configured to automatically create a PDF and attach it to the document item on Save, Save and Close, or both.

The training database is configured to generate the PDF in the background when you Save and Close the Office Connector document.

Try it … Display a Viewable File

1. Return to the browser client of Aras Innovator and navigate to TOC > Documents > Documents.
2. Search for and open the **MP2942 Body assembly requirements** document that was just created.
3. Click the PDF viewer button on the side bar to open the PDF file for viewing.
4. In the Files tab, notice that Office Connector automatically saves both the native file and the related PDF.



Linking Documents to Items using Office Connector

You can link a document to existing items in the database, such as Parts, Activities or Projects. Multiselect, rather than adding linked items one at a time, is now supported in the Links to Aras Items search dialog for existing documents.

An Aras Innovator Administrator determines possible valid link Items.

To link a document to an item the following must be true:

- You must have editing permissions on the item.
- The item must be in a state that allows editing.

Once linked, the document item appears in the Documents tab of the linked item in Aras Innovator.

You can establish the relationship in Office Connector when creating the document or while editing an existing document.

Link to an Item When Creating an Office Connector Document

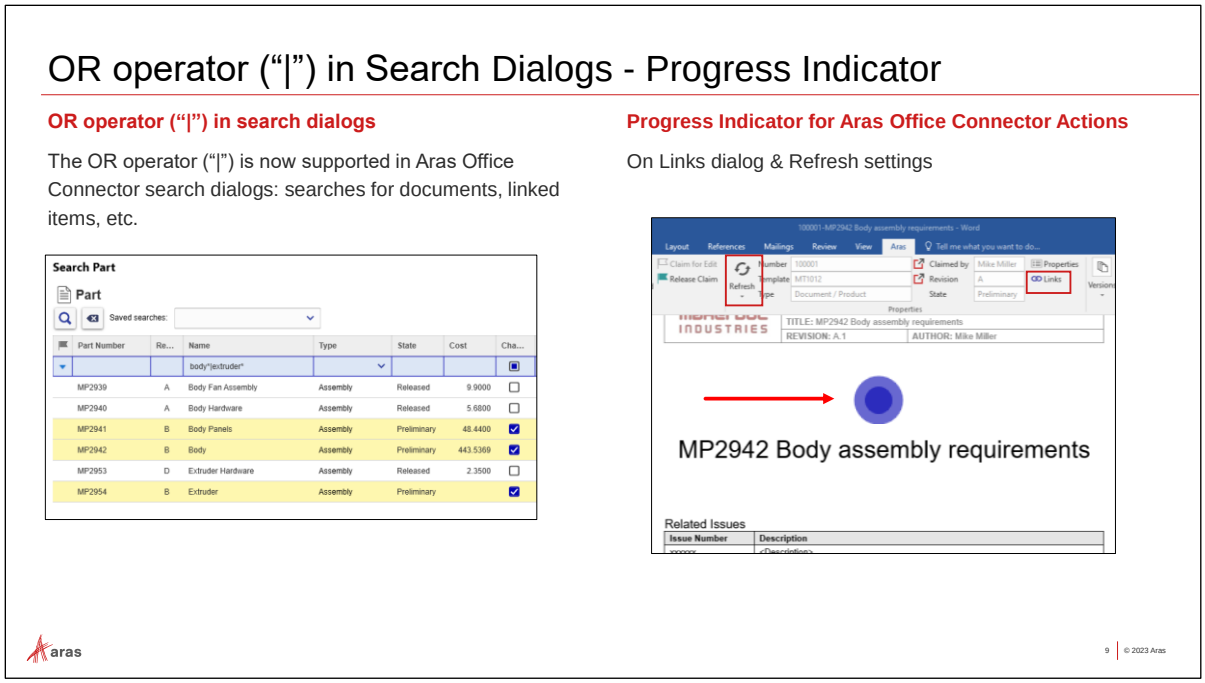
You can establish the relationship to an Aras Innovator item when creating an Office Connector document. In the New Aras Document window, select an ItemType from the Link to list, then click the ellipsis to select the specific Item.

Link to an Item from an Existing Office Connector Document

To establish a relationship for an existing document, open the document from Aras Innovator in edit mode and click Links. Then select the ItemType and item to be linked.

To remove the link between a document and an Item, open the document in edit mode and click the Remove Link action.

Documents that have been edited in Aras Innovator will need to be saved to preserve the Aras to Office property mappings. A prompt will appear to allow you to Save to Aras.



OR operator (“|”) in Search Dialogs - Progress Indicator

The OR operator (“|” pipe character) is now supported in Aras Office Connector search dialogs, as in searches for documents or linked items.

Progress Indicators have been implemented to communicate Aras Office Connector actions that are in progress. Progress Indicators have been added for the document creation process, and added to the Links Dialog, Compare Selected, Compare to Current, Get Latest Version, Claim for Edit, Release Claim, and Refresh operations.

Try it … Link the newly created Document to Part Items

In the following steps, you link the Body assembly requirements document to two Body Parts and an extruder Part.

Open the Office Document

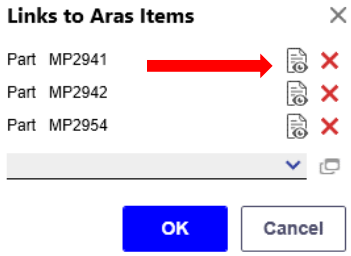
1. Return to active Microsoft Word application.
2. From the Aras tab, click Open.
3. Open for editing the **MP2942 Body assembly requirements** document, by searching for this document and clicking Edit.

Create the Linked Relationship

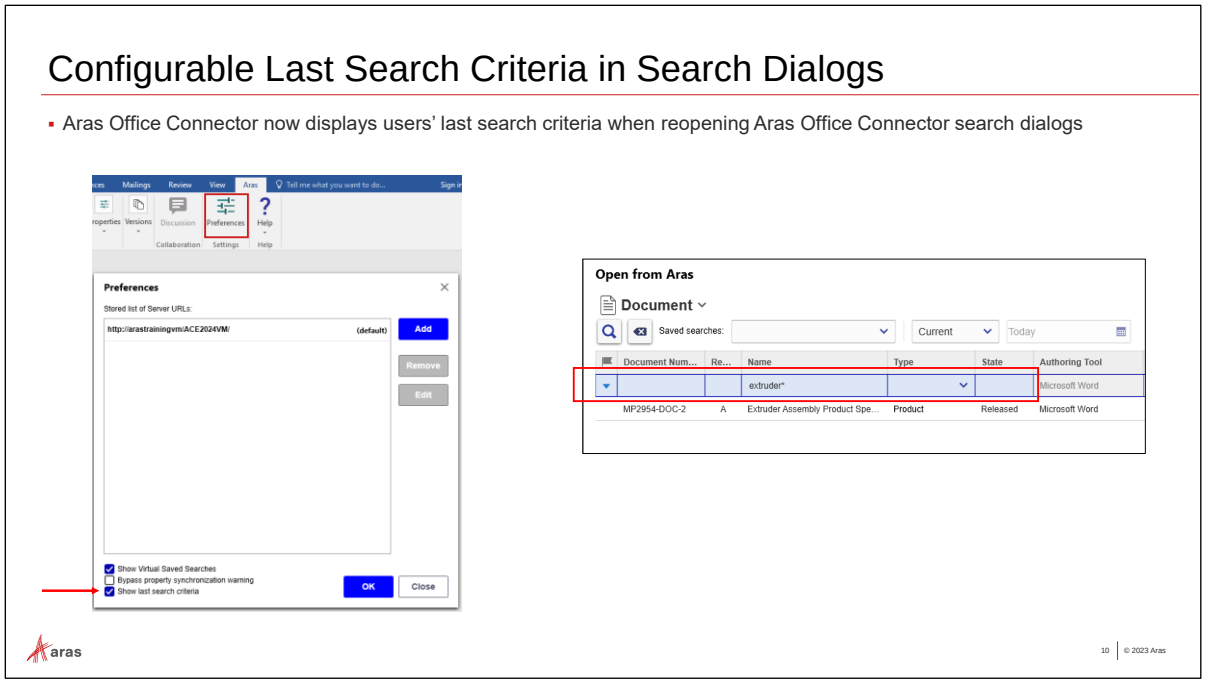
1. From the Aras tab, in the Properties group, click **Links**.
2. In the Links to Aras Items window select **Part (Document)** from the menu.
3. Click the windows button and search for Parts using *body*|*extruder** as the Name criteria.
4. Multi-select the preliminary parts: MP2941 Body Panels, MP2942 Body, and MP2954 Extruder.
5. Click OK.
6. Click OK to confirm the new relationships.
7. Click Save to Aras.

Confirm the Linked Relationship

1. On the Aras tab, in the Properties group, click **Links** to open the Links to Aras Items window.
2. Click the View Linked Item button.



3. The selected Part opens in Aras Innovator.
4. Select the Documents tab of the open Part to view the related document listed in the grid.
5. Return to Word and click OK to close the Links to Aras Items window.
6. Click Save to Aras.

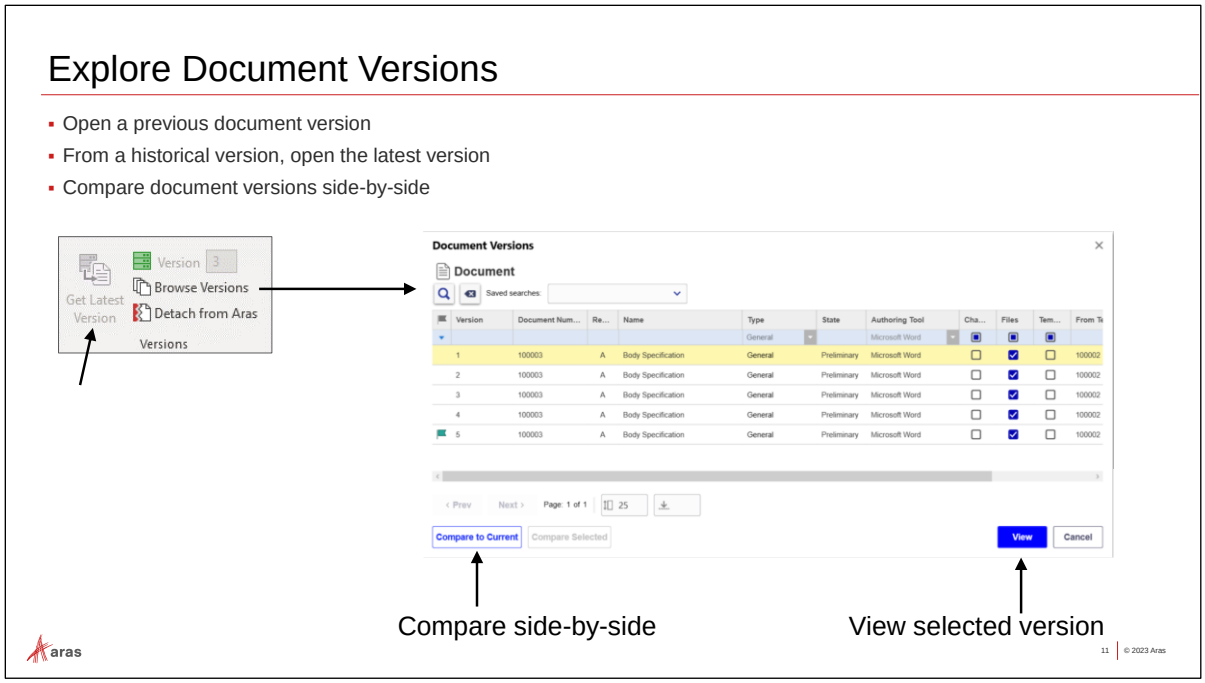


Configurable Last Search Criteria in Search Dialogs

The Aras Office Connector can now display users' last search criteria when reopening Aras Office Connector. It can be configured in Preferences.

Try it … Test the last search criteria in search dialogs

1. From the Aras tab in Microsoft Word, select Preferences and verify that "Show last search criteria" is enabled.
2. In the Aras tab, click Open and run a search (e.g. with **requirements** as search criteria on the Name). Click Cancel, then open the search window again and observe the search criteria entered previously remains.
3. If you prefer searches to not remember the previous criteria, select Preferences, and uncheck the "Show last search criteria". Select Open from Aras to initiate a new search and observe the search criteria is empty.



Explore Document Versions

Aras Innovator Documents support item versioning, which is useful for tracking changes to an Office file. Document items are configured out-of-the-box to support a major revision and a generation, which is displayed as a version number in the Aras tab.

A new version (generation) is created each time an Aras Innovator Document is opened for edit (claimed) and then saved and closed (unclaimed).

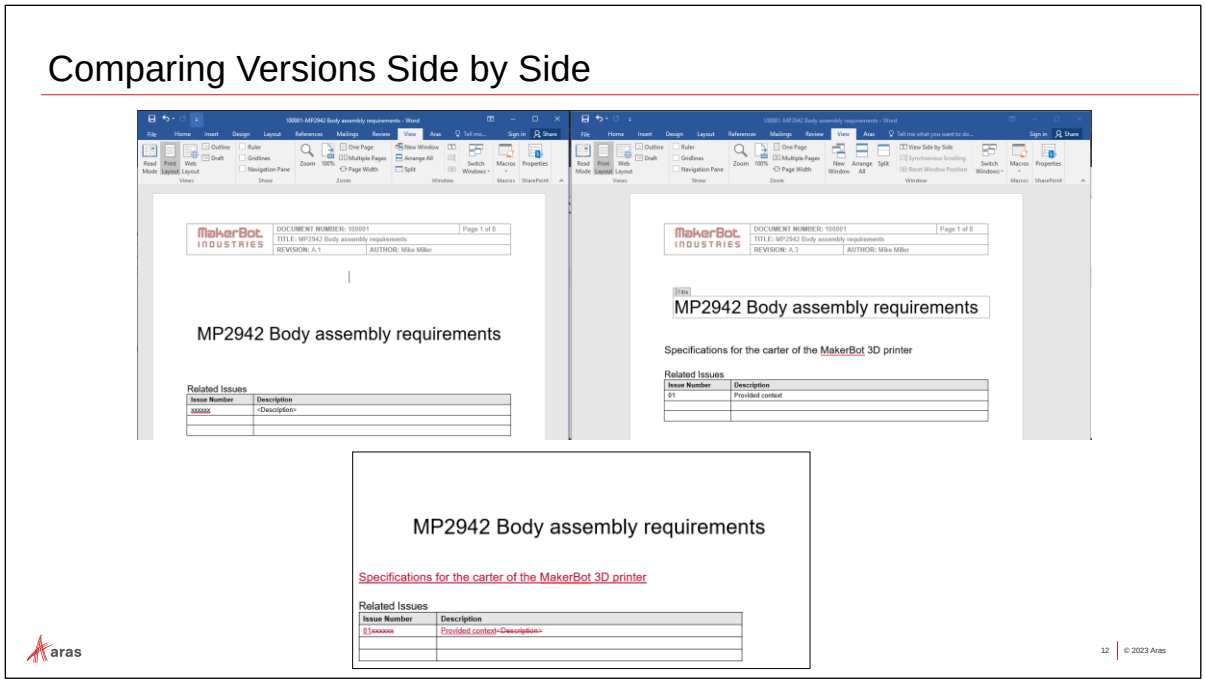
The previous versions of documents saved in the Aras Innovator database are accessible in Office Connector. You can open previous versions of a document and compare versions side by side using tools from the Versions group of the Aras tab. The color of the version indicator on the Aras tab indicates the status of the file you are viewing.

At any time, you can get the latest version from Aras Innovator, which closes the local file you are viewing and opens the latest file.

Note: An Administrator can manage document versioning similar to other Aras Innovator solutions such as Document Change Management to control life cycle and security settings through the life of a document.

When a user opens a document for editing, the document item is claimed to prevent other users from making changes on the same file. However, other users may still retain a copy of a file in their local working directory.

When a user opens an out-of-date copy locally, the Aras tab version indicator is set to yellow indicating the file is out of date. When updating an old version, a message appears indicating that the current file will close and changes to that file will be lost. By using Save As to Aras, you can create a new document with the current file contents.



Comparing Versions Side by Side

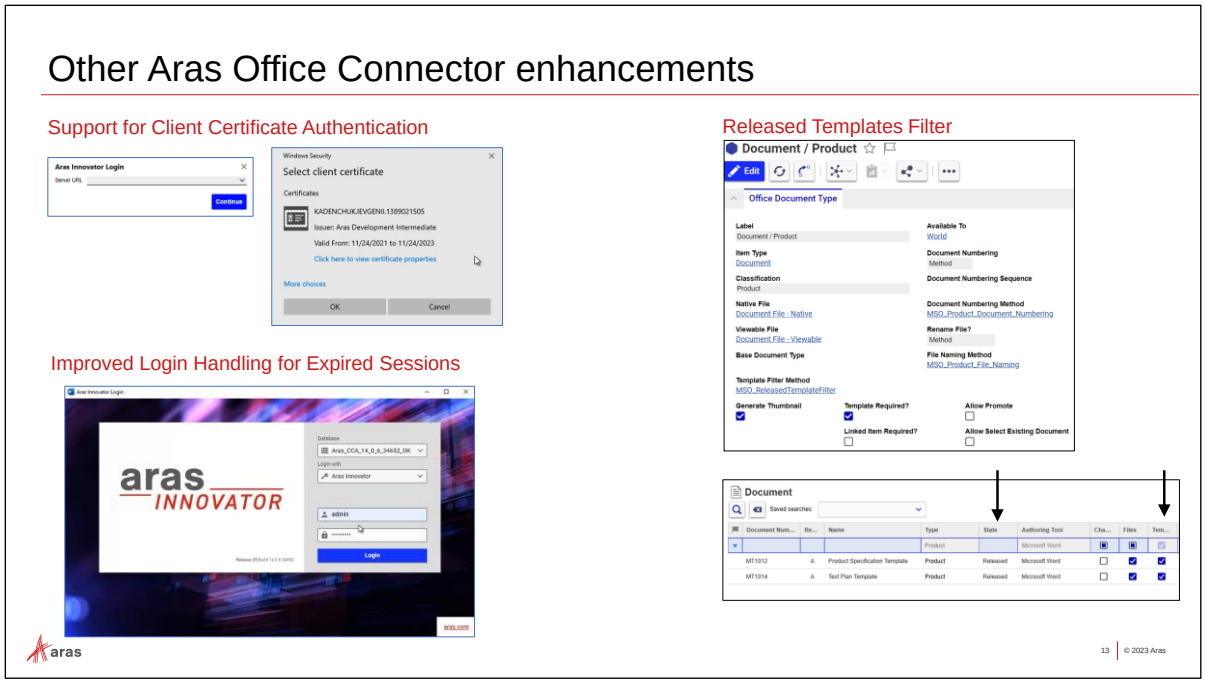
Comparing versions side by side enables you to examine changes made between versions. In addition to viewing each version in Word, you can also view a document with each specific change highlighted.

Try it … Explore Document Versions and Compare side-by-side

1. Open the **MP2942 Body assembly requirements Document** for editing.
2. Insert *Specifications for the carter of the MakerBot 3D printer* between the title and the Related Issues table.
3. In the Related Issues table, replace the first row by entering:

Issue Number	Description
01	Provided context

4. Click Save to Aras.
5. Select Browse Versions, from the versions button, and populate the Document Number criteria.
6. Run the search, select the first row (version 1).
7. Click Compare to Current. (in the bottom left corner of the window)
8. Word will open a new window displaying both versions as well as a Compared Document pane.
9. Close both without saving the ‘Compared Result’ and the version 1 data windows.
10. Notice that the Version icon is green indicating the latest, click Save and Close. Click OK upon prompt.



Other Aras Office Connector enhancements

The Aras Office Connector now supports **Client Certificate Authentication** during login.

The Aras Office Connector now automatically displays the **Aras Innovator login dialog** if a user's session expires. Users can now re-login to continue their session or logout using this dialog. Users no longer need to manually log out and log in again upon session expiration.

A setting has been introduced to allow administrators to specify that only **released templates** be made available for use during document creation. This configuration can be switched on/off for each individual Document Type. This is achieved by going to Administration > Preferences > [selected group] > Office Preferences tab > Office Connector Settings > Document Types > (selected document type], then changing the template Filter Method value top reflect desired outcome:

- MSO_ReleasedTemplateFilter: only released templates can be used to create a document instance.
- MSO_DefaultTemplateFilter: the default behavior for template selection is active (i.e., if the template is unreleased, the latest generation of the template is displayed, regardless of the state, and selectable by the user. If the template has been "Released", only the "Released" version of the template should be displayed and selectable by the user.)

Try it … Verify the Released template filter

1. In Aras Innovator, run a search for Microsoft Word templates by setting the criteria for the Authoring Tool and Template properties.
2. Right click on **MT1012** (Product Specification Template) > More > Save as.
3. Edit and fill the following:

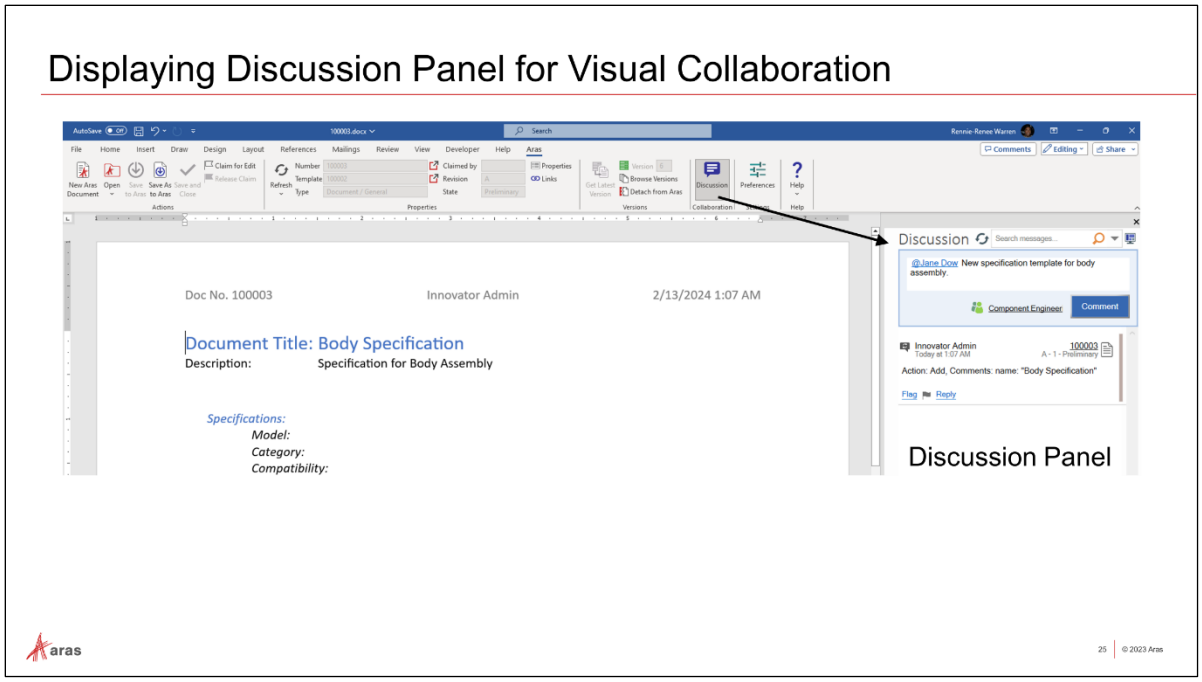
Document Number	MT1017
Name	Project Template
Assigned Creator	Mike Miller

4. Click Done and unclaim.

5. In Word, in the Aras tab, click New Aras Document.
6. Select the Product type and observe whether the preliminary template can be selected.

Try it … As administrator, verify the configuration

7. Login as administrator (login: admin / password: innovator).
8. In the TOC, go to Administration > Preferences.
9. Open World Preference.
10. In Word preference, go to the Office Preferences tab. Open Office Connector Settings.
11. In Office Connector Settings, go to Document Types tab, then open the Document / Product related item.
12. In Document / Product, observe the value of Template Filter Method property.

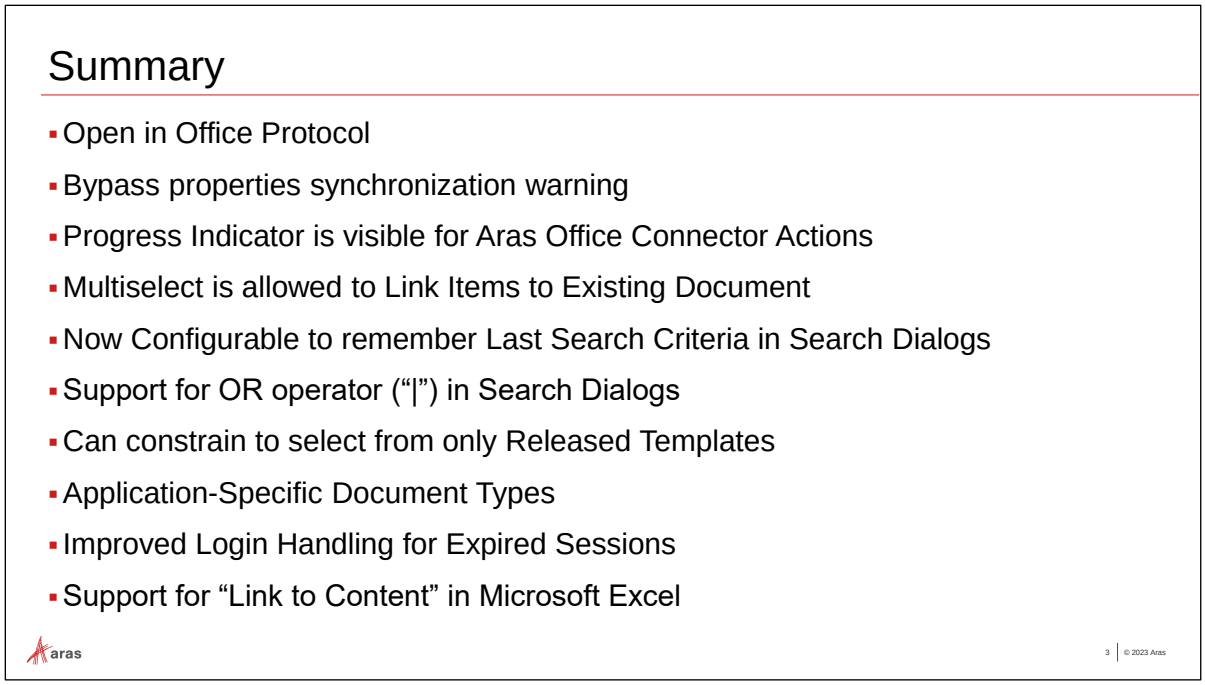


Display Discussion Panel for Visual Collaboration

Office Connector also supports Visual Collaboration. Once a new document has been saved to Aras Innovator, you can display the Discussion panel. When editing or creating document items, you can initiate or add comments and replies to discussion threads. Documents do not have to be claimed to display or add comments to a discussion thread.

Try it … Display the Discussion Panel while viewing in Word

1. Select Open from the Aras tab in Word, and search to find MP0101-DOC-2.
2. Comments can be viewed and created by selecting either View or Edit. If you select View, a warning dialog appears asking if you want to lock it (Claim).
3. Click on the Discussion Panel button on the Aras tab.
4. Enter a new comment or reply to some of the comments made by Terry Adams or Diane Prescott.
5. Return to the browser client and search to find MP0101-DOC-2.
6. Notice the new comments or replies that you just added. (If this window was previously opened, you should click on the refresh button in Discussion panel or the form view of document).



Summary

In this unit, you learned how to use the Aras Office Connector to create and edit documents.

You should now be able to:

- Use Aras Office Connector to create and save Aras Innovator Documents
- Link Office Connector documents to Aras Innovator items
- View multiple document versions
- Discover new functionalities added to R14-R27