Aras Innovator Cloud Services Guide

Aras Innovator 10.0

Document #: 10.0.02013120236

Last Modified: *12/30/2013*

ARAS CORPORATION

Copyright © 2013 Aras Corporation. All rights reserved

Aras Corporation
300 Brickstone Square
Suite 700
Andover, MA 01810

Phone: 978-691-8900
Fax: 978-794-9826

E-mail: Support@aras.com
Website: http://www.aras.com

Notice of Rights

Notice of Liability

Table of Contents

Send Us Your Comments

Aras Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for future revisions.

- o **Did you find any errors?**
- o **Is the information clearly presented?**
- o **Do you need more information? If so, where and what level of detail?**
- o **Are the examples correct? Do you need more examples?**
- o **What features did you like most?**

If you find any errors or have any other suggestions for improvement, please indicate the document title, and the chapter, section, and page number (if available).

You can send comments to us in the following ways:

- o **Email:**
  Support@aras.com
  Subject: Aras Innovator Documentation

Or,

- o **Postal service:**
  Aras Corporation
  300 Brickstone Square
  Suite 700
  Andover, MA 01810
  Attention: Aras Innovator Documentation

Or,

- o **FAX:**
  978-794-9826
  Attn: Aras Innovator Documentation

If you would like a reply, please provide your name, email address, address, and telephone number.

If you have usage issues with the software, please visit http://www.aras.com/support/

1 Overview

Aras Cloud Services are functions that utilize a Cloud Service to bring useful tools such as Managed File Transfer, File Replication, within the Aras Innovator User Interface.

This document explains how to enable, administer and use each of the Cloud Services within Aras Innovator.

1.1 List of Cloud Services

1.1.1 TRUaras

TRUaras is an advanced Managed File Transfer service from Trubiquity. By enabling the TRUaras service, Aras users can securely exchange files of any size with customers, suppliers and others from within Aras Innovator. TRUaras provides tracking, traceability and an audit trail of every file transfer for compliance purposes. Because TRUaras is available within Aras Innovator, sharing files with partners couldn't be easier. TRUaras is free for Aras users.

2 Prerequisites

Aras Cloud Services require the installation of the Aras Innovator.

2.1 Aras Innovator 10.0 or higher

Before proceeding, you will need to install Aras Innovator. Please see the *Aras Innovator – Installation Guide*.

2.2 Internet access

Both the Innovator Server and the Client machine need to be able to access the internet.

3 TRUaras

This chapter describes how to administer and use TRUaras. In order to use TRUaras, an Administrator has to Register TRUaras first. To Register TRUaras, please see the TRUaras Administration section below

3.1 TRUaras Overview

TRUaras is an advanced Managed File Transfer service from Trubiquity. By enabling the TRUaras service, Aras users can securely exchange files of any size with customers, suppliers and others from within Aras Innovator. TRUaras provides tracking, traceability and an audit trail of every file transfer for compliance purposes. Because TRUaras is available within Aras Innovator, sharing files with partners couldn't be easier. TRUaras is free for Aras users.

3.1.1 Terminology

TruCore Users (also known as Trubiquity Users) – Users that reside within Trubiquity's Managed File Transfer Service.

Identity to TruCore Users –Items in Innovator that maps your Innovator Users' Identity to Trubiquity's TruCore users. This mapping is what enables Innovator users to utilize TRUaras.

Trading Partners – Any TruCore User who is a part of the TRUaras community that you can send files to.

File Exchange Packages – Items in Innovator that consist of a set of files that can either be uploaded or are created from a download from the TRUaras Cloud Service

File Exchange Transactions – Items in Innovator that represent the actual transaction of upload or download. File Exchange Transactions have a corresponding File Exchange Package that in turn contains files.

3.2 TRUaras Administration
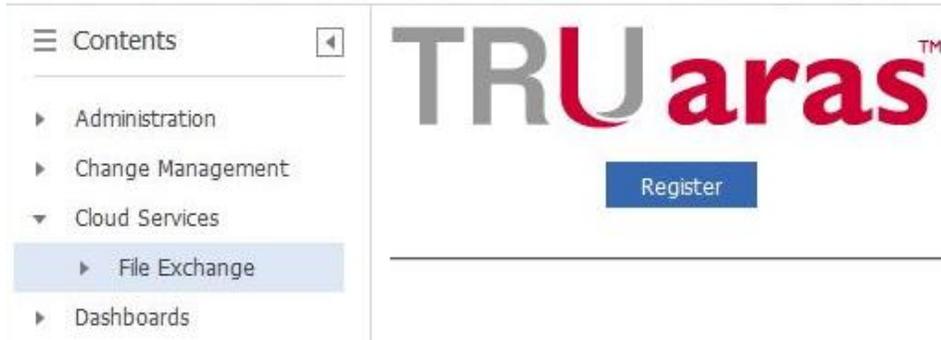
All of the actions in this section can only be performed by an Administrator in Innovator.

3.2.1 Register

To enable Managed File Transfer using TRUaras, you have to first register your Innovator Instance with Trubiquity.

1. Log on to Innovator as an **Administrator**. For example, admin.

2. From the TOC Navigate to **Cloud Services -> File Exchange** and click on **File Exchange**.

3. Click on **Register.**

4. You will be prompted to join the **TRUaras community**. By joining the TRUaras community, your Company's registration information as well as First Name, Last Name and email id of all the users enabled to use TRUaras will be searchable by other members of the TRUaras community. Click **OK** to continue.
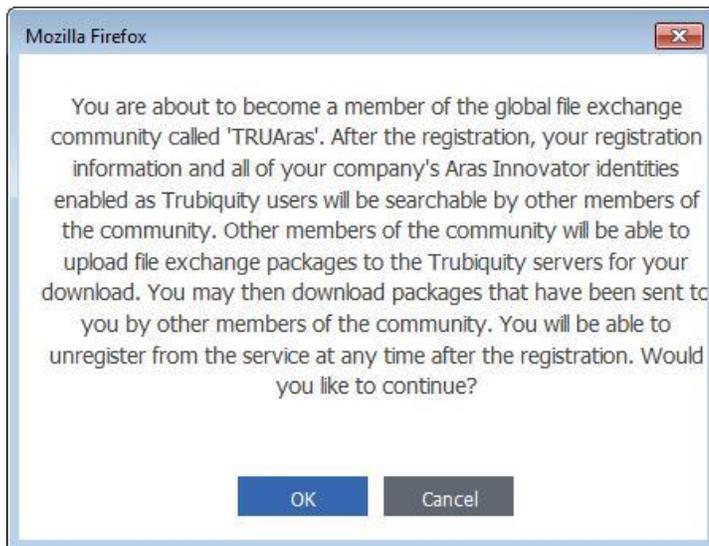
5. Enter your company information and click the green checkmark icon ✓ on the top

6. If registration is successful the **Feature Activated** Dialog is shown. You are now ready to Add Trubiquity users.
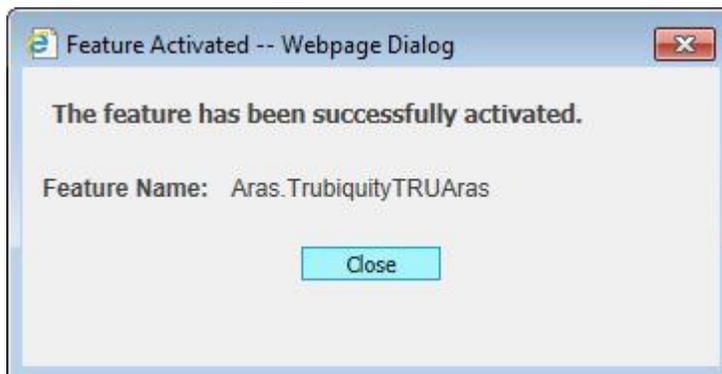
You should now see a green checkmark and "**Registered**" under the TRUaras logo.

3.2.2 Update Information

To change the Trubiquity registration information for your Company:

1. Log on to Innovator as an **Administrator**, example, admin.

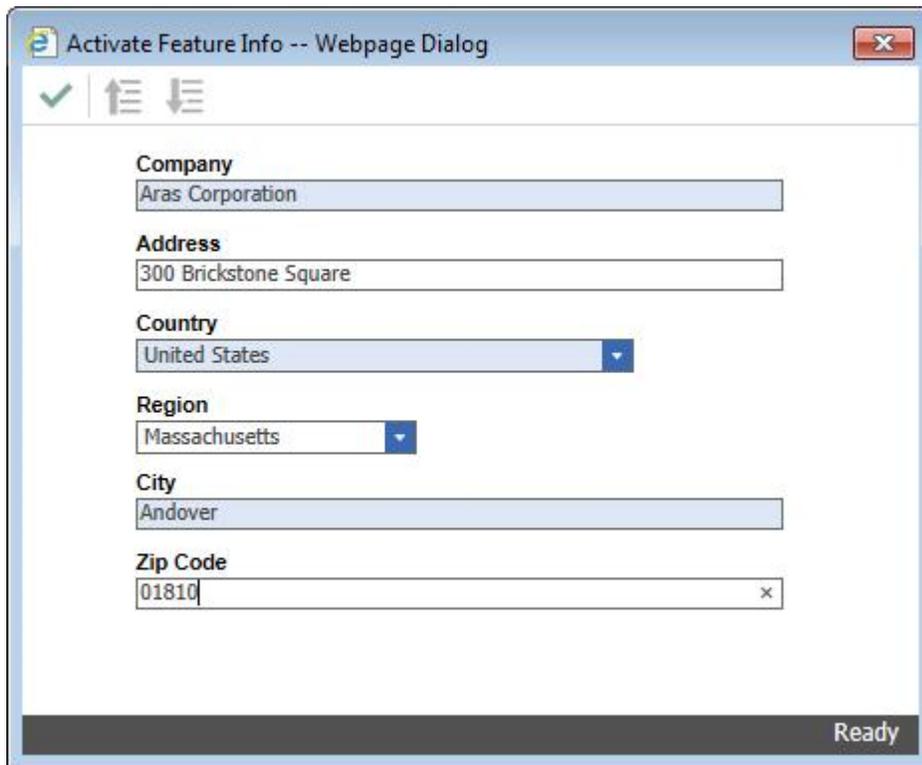2. From the TOC Navigate to **Cloud Services -> File Exchange** and click on **File Exchange.**

3. Click on the down arrow next to Registered to bring up the TRUaras menu. Select **Update Information**.

4. Update your Company's Registration Information and click on the green checkmark icon on the top. The new information will now be available on the TRUaras community.

3.2.3 Identities to TruCore User Mappings

In order for any Innovator user to use the TRUaras Cloud Service the user must be mapped through one of its Identities to a TruCore user. Note that such mapping gives Innovator administrator a choice:

- A single user in Innovator can be mapped to a single TruCore user; this can be achieved by associating the user's "alias" identity with a TruCore user

- A group of user in Innovator can be mapped to a single TruCore user; this can be achieved by associating a "group" identity in Innovator with a single TruCore user. Note that in this case all Innovator users that belong to the "group" identity will be impersonated in TRUAras community as single user.

Note that if a particular Innovator user is associated with more than one TruCore user through multiple identities (e.g. first through its "alias" identity and then through one of its "group" identities) then mapping to the TruCore user is done as the following: if the Innovator user's "alias" identity" has association with a TruCore user then use this TruCore user; otherwise use one of TruCore users associated with one of user's "group" identity.

To map Innovator identity to TruCore user:

1. Log on to Innovator as an **Administrator**, example, admin.

2. From the TOC Navigate to **Cloud Services -> File Exchange** and click on **File Exchange.**

3. Click on the down arrow next to Registered to bring up the TRUaras menu. Select **Identities to TruCore Users Mapping.**


4. From the menu bar, go to **File -> New** or from the Toolbar select **Create New Item** ⊞.

5. Fill in the **Identity To TruCoreUser** Form:

    a. **Identity –** Select the Identity of the User in Innovator that will be mapped to a TruCore User.

    b. **First Name** – Automatically filled after selecting **Login Name.**

    c. **Last Name -** Automatically filled after selecting **Login Name.**

    d. **Login Name** – Click on the input box. This launches the **Assign Identity With TRUaras's User** window.

    From the Toolbar, select the **Create TruCore User** as highlighted above. This launches a **Create New TruCore User** window. Fill in the User Information and click the green checkmark on the top left. The newly created user appears as a row in the **Assign Identity with TRUaras's User** window.

Make sure the **Enable trucore user** icon (as shown below) in the toolbar is greyed out. If for some reason, the Enable trucore user icon is not greyed out, click on it to make sure the user is enabled.

**Select the newly created user and click on the green checkmark icon** .
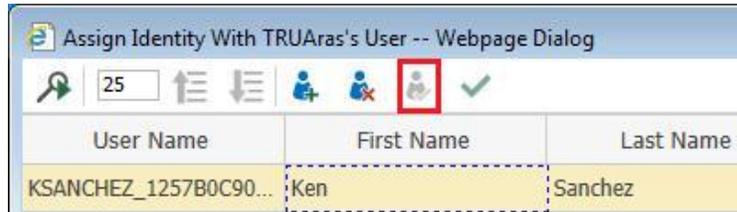
6. **Save, Unlock & Close** the Identity to TruCoreUser Item. After that any Innovator user who is a member of the identity assigned to the TruCoreUser will be able to use TRUaras.

3.2.4 Manage Trubiquity Users

Manage Trubiquity Users lets you View, Enable and Disable TruCore Users for your company.

1. Log on to Innovator as an **Administrator**, example, admin.

2. From the TOC Navigate to **Cloud Services -> File Exchange** and click on **File Exchange.**

3. Click on the down arrow next to Registered to bring up the TRUaras menu. Select **Manage Trubiquity Users.**
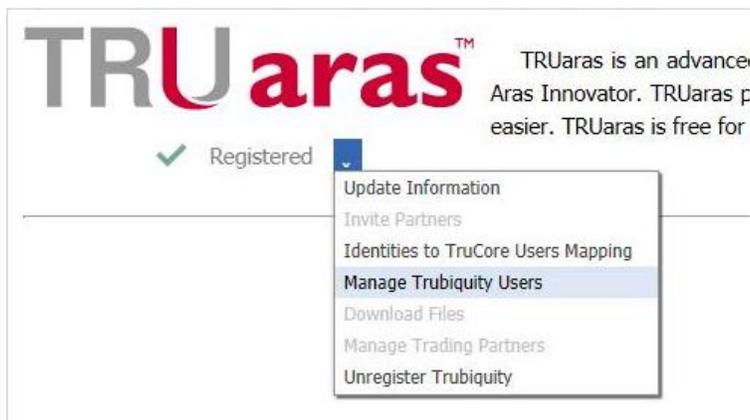
4. The **Manage Trubiquity Users** window shows you all the TruCore Users in your Company.

Search – Use the Search icon to view all TruCore Users of your company.

Create TruCore User – Use the Create TruCore User icon to Create a New TruCore User for your company. This launches a **Create New TruCore User** window. Fill in the User Information and click the green checkmark icon on the top left.

Disable TruCore User – Select a TruCore User from the list and click on the Disable TruCore User icon to disable the user. The user will no longer be able to Upload File Exchange Packages, Download File Exchange Transactions or Manage Trading Partners in TRUaras. The corresponding Innovator user will still be able to do everything he can do in Innovator.

Enable TruCore User – To enable a TruCore User that had been previously disabled, select the TruCore User from the list and click on the Disable TruCore User icon . The TruCore User can now Upload File Exchange Packages, Download File Exchange Transactions or Manage Trading Partners in TRUaras as long as there is a corresponding Identities to TruCore Users mapping.

3.2.5 Unregister

If you no longer wish to use TRUaras you can unregister your Company from the TRUaras Cloud Service.

1. Log on to Innovator as an **Administrator**, example, admin.

2. From the TOC Navigate to **Cloud Services -> File Exchange** and click on **File Exchange.**

3. Click on the down arrow next to Registered to bring up the TRUaras menu. Select **Unregister.**

4. Click on the **OK** button confirmation dialog to Unregister.

5. You should now see the green checkmark under the TRUaras logo disappear and the Registered menu is now replaced by a **Register** button.

3.3 Using TRUaras

An Innovator User that has an enabled TruCore User mapped to his Identity can perform all the functions in this section. If you are a user that sees the screen below when you navigate to **Cloud Services -> File Exchange** from the TOC, this means that your Innovator instance is not set up to use TRUaras. Please contact your Innovator Administrator to have them Register with TRUaras.
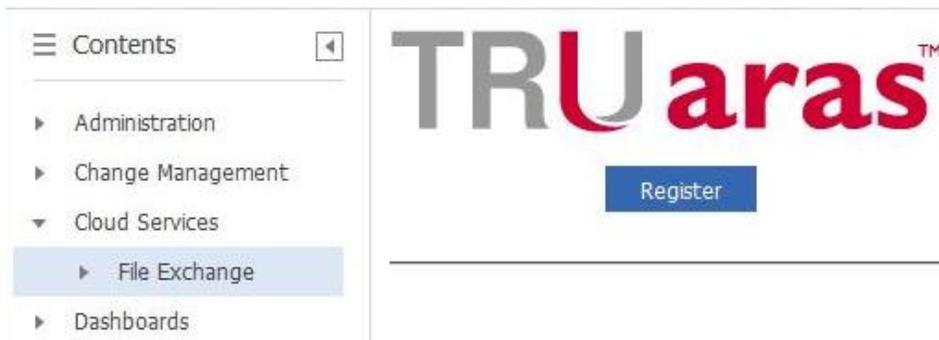

3.3.1 Invite Trading Partners

If the person whom you would like to securely exchange files with through TRUaras community uses Innovator then all you need is to make sure that both of you registered for the TRUaras Cloud Service in Innovator. After that you should be able to search for this person and set it up as you trading partner (see section *3.3.2 Manage Trading Partners* below for more details). If the person whom you would like to securely exchange files with through TRUaras does not use Innovator s\he can still join the TRUars community. In order to do this you must invite the person who does not use Innovator to use the TRUaras Cloud Service. Once a person signs up with Trubiquity to use the TRUaras service, you can add the person as a trading partner and securely exchange files with them. To invite a trading partner:

1. Log on to Innovator.

2. From the TOC Navigate to **Cloud Services -> File Exchange** and click on **File Exchange.**

3. Click on the down arrow next to Registered to bring up the TRUaras menu. Select **Invite Trading Partners.**
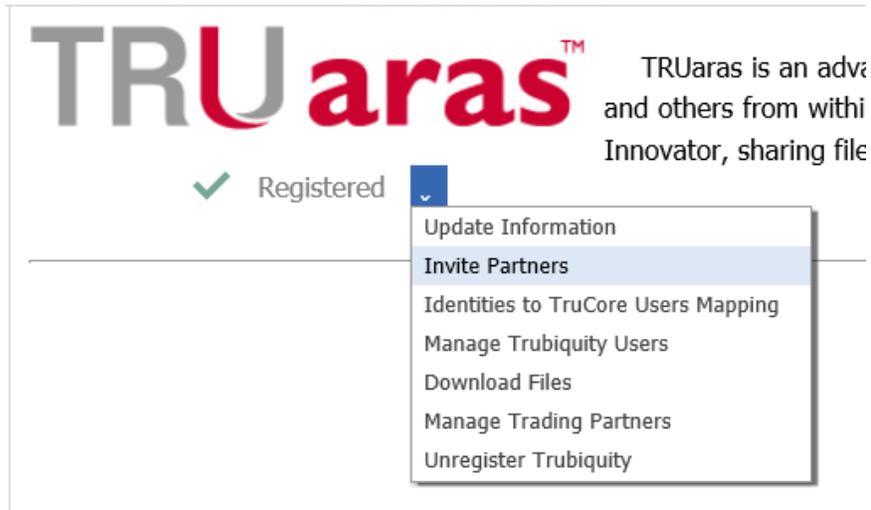
4. Your user in Innovator must have a valid email address in order to be able to perform this step.

5. Fill in the email(s) addresses of the people you want to invite. You can enter multiple email addresses by clicking on the Add New Email Address icon @.

   Then click the Send Invitations icon ↩ to send the automated email from Innovator. The email has instructions to the sender on how to join TRUaras.

3.3.2 Manage Trading Partners

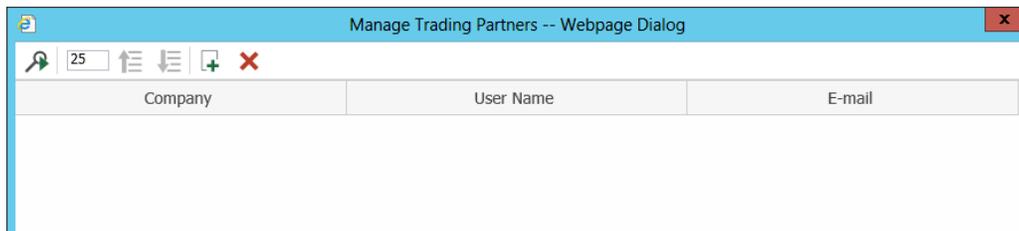As a TRUaras user you can add or delete Trading Partners to exchange files with.

1. Log on to Innovator.

2. From the TOC Navigate to **Cloud Services -> File Exchange** and click on **File Exchange.**

3. Click on the down arrow next to Registered to bring up the TRUaras menu. Select **Manage Trading Partners.**
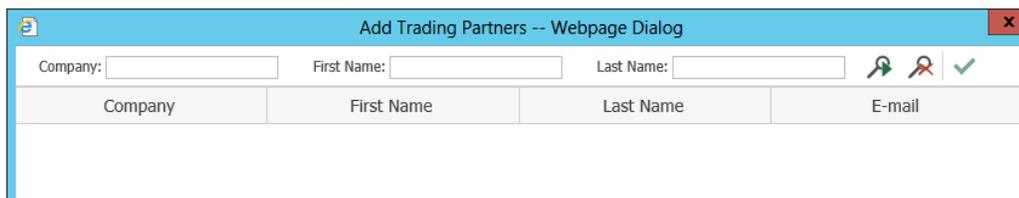
4. This launches the **Manage Trading Partners** window.

Delete Trading Partner – Select the Trading Partner and click on the Delete Trading Partner icon ✖ to remove the Trading Partner from your list. You will not be able to send File Exchange Packages to this Trading Partner anymore.

Add Trading Partner – Click on the Add Trading Partner icon ⊞ to launch the **Add Trading Partners** window. Search for the user that you want to add by typing in one or more of the **Company**, **First Name**, and **Last Name** properties and clicking on the Run Search icon 🔎. Search is NOT case sensitive and results that match the string anywhere in the property are returned, in other words, the criterion is a "contains string". Example, typing in **ras** in Company and **San** in Last Name returns all Trading Partners that have **ras** anywhere in the Company AND also has **San** anywhere in the Last Name.


Select the Trading Partner and click on the green checkmark icon ✓. The newly added Trading Partner now shows up in your Manage Trading Partners window. You can now send File Exchange Packages to the new Trading Partner.

3.3.3 Download Files

When Trading Partners send you File Exchange Packages you can download them to you Innovator instance.

1. Log on to Innovator.

2. From the TOC Navigate to **Cloud Services -> File Exchange** and click on **File Exchange.**

3. Click on the down arrow next to Registered to bring up the TRUaras menu. Select **Download Files.**
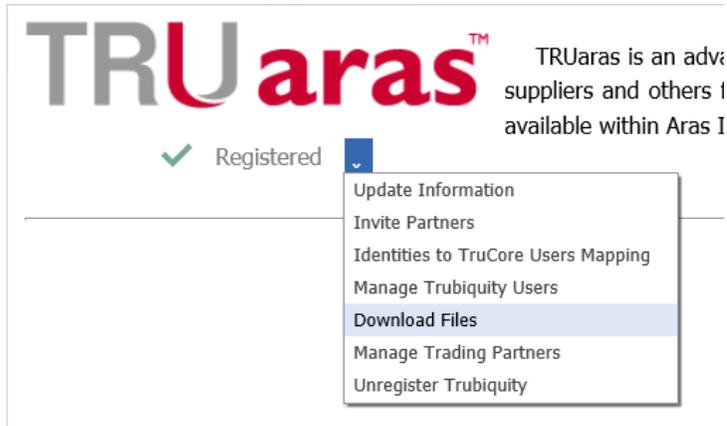
4. Any transactions available for you for download from the Trubiquity server will appear in the **Available Transaction** window.
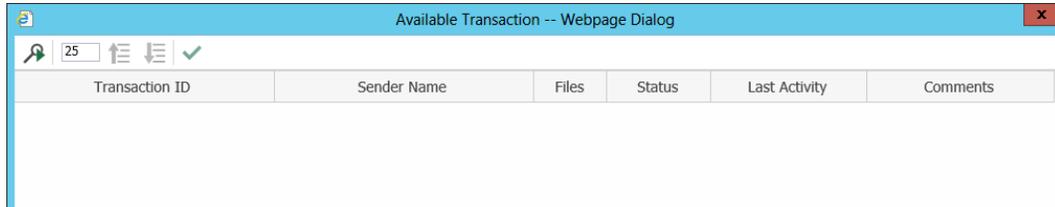
5. Click on a transaction and click on the green checkmark icon ✔ to begin downloading the Files in the transaction.

6. The status of the download and the corresponding **Transaction Number** will be shown near the Status bar.
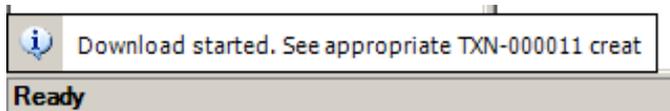
7. From the TOC Navigate to **Cloud Services -> File Exchange -> File Exchange Transactions,** search and find the *File Exchange Transaction* from the step above. You can view the **Transaction Status** to see if all files were successfully downloaded into Innovator. If download of any files in the transaction failed then the **Transaction Status** will be *ErrorOccured.* User should be able to select failed *File Exchange Transaction* and make another attempt to download failed files. After the File Exchange Transaction finished successfully a new *File Exchange Package* is created. Note that if download of

any file in the transaction failed then the package is not created. From the Main Grid click on the **Package** that corresponds to the **File Exchange Transaction.**

Transaction Num...	Service Provider	Transaction Status	Transaction Type	Package [...]	Attempts to Exec...	Error Message	User Comments
TXN-000001	Aras.TrubiquityT...	Success	Upload	PKG-000002	1		Market Specs 7.1...
TXN-000002	Aras.TrubiquityT...	Success	Upload	PKG-000002	1		Market Specs 7.1...
TXN-000003	Aras.TrubiquityT...	Success	Download	PKG-000003	1		Market Specs 7.1...
TXN-000004	Aras.TrubiquityT...	Success	Download	PKG-000004	1		Market Specs 7.1...
TXN-000005	Aras.TrubiquityT...	Success	Upload	PKG-000001	1		
TXN-000006	Aras.TrubiquityT...	Success	Upload	PKG-000002	1		Market Specs 7.1...
TXN-000007	Aras.TrubiquityT...	ErrorOccurred	Upload	PKG-000002	1	Could not find a p...	Market Specs 7.1...
TXN-000008	Aras.TrubiquityT...	Success	Upload	PKG-000012	1		Stepstruder Asse...
TXN-000009	Aras.TrubiquityT...	ErrorOccurred	Upload	PKG-000002	1	Could not find a p...	Market Specs 7.1...
TXN-000010	Aras.TrubiquityT...	Success	Upload	PKG-000013	1		Market Specs
TXN-000011	Aras.TrubiquityT...	Success	Download	PKG-000014	1		Stepstruder Asse...

8. The **File Exchange Package** shows the Description that the sender filled in and the timestamp of when it was sent. The **Files** tab contains all the files that are part of the package. You can right click and view the Files that you downloaded.
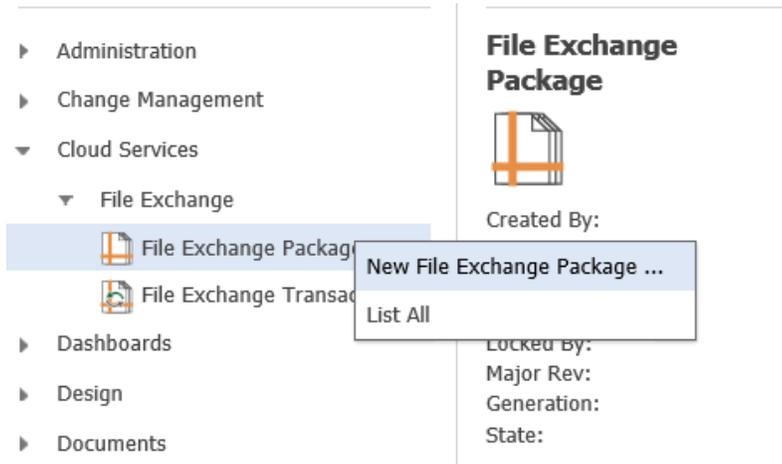

3.3.4 Create/Upload File Exchange Packages

You must first create a File Exchange Package to be able to upload it to Trubiquity to send to your Trading Partners.

1. Log on to Innovator.

2. From the TOC Navigate to **Cloud Services -> File Exchange -> File Exchange Packages** and right click on it and select **New File Exchange Package ...**


3. Fill in the **Description** of the set of files that you are about to send. Your recipient(s) will see this Description to understand what you are sending them.

4. From the **Files Tab** at the bottom, click on the New Relationship icon ⊞. This launches the **Copy file(s) from another item(s)** window. From the top left select the Item type that you want to add files from.
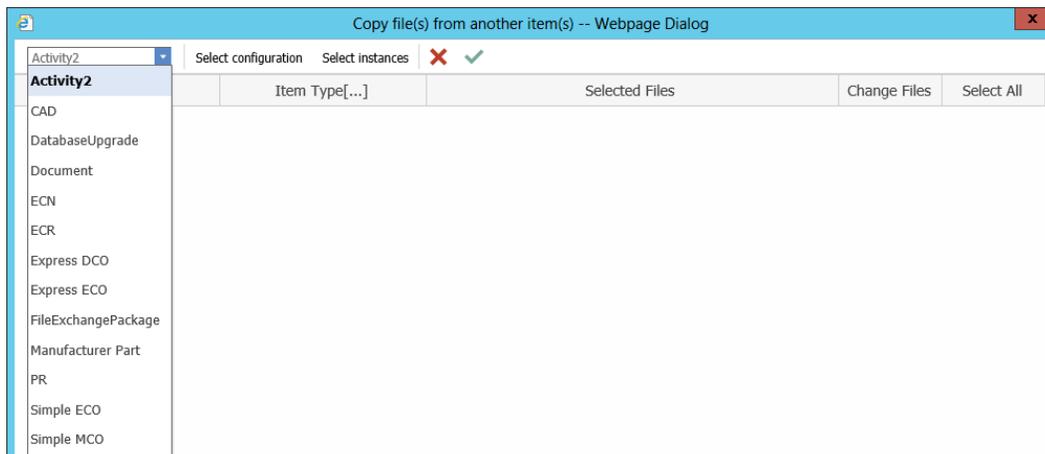

5. Then click on **Select configuration** on the Toolbar to choose the type of files that you want to copy from items of the selecte item tye. Click the green checkmark icon ✔ to apply the configuration.
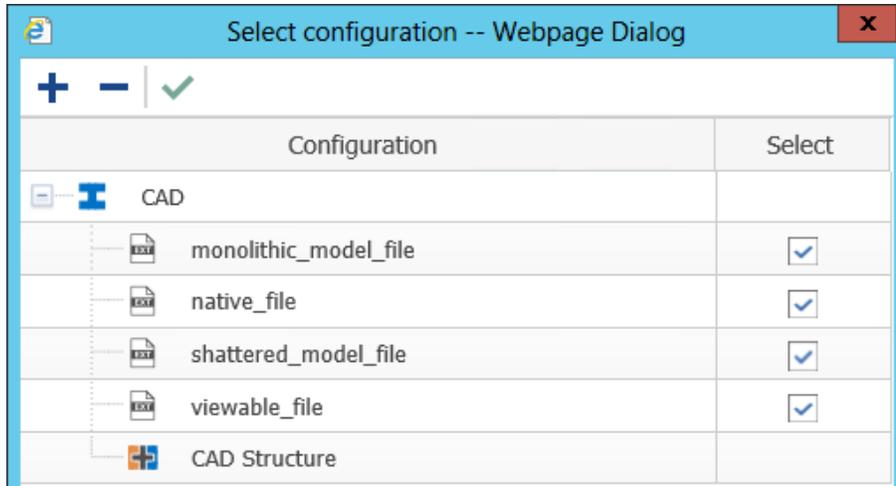
6. Click on **Select instances** on the Toolbar to search for the Items to copy. Select one or more items from the Search Results and then click on the green checkmark icon ✓. The Selected Items and the files to be copied from those Items will now appear as rows in the **Copy file(s) from another item(s)** window. You may add more items or remove the ones you accidentally added.

7. From the **Copy file(s) from another item(s)** window, click on the green checkmark icon ✓ on the Toolbar to add the Files to the File Exchange Package.
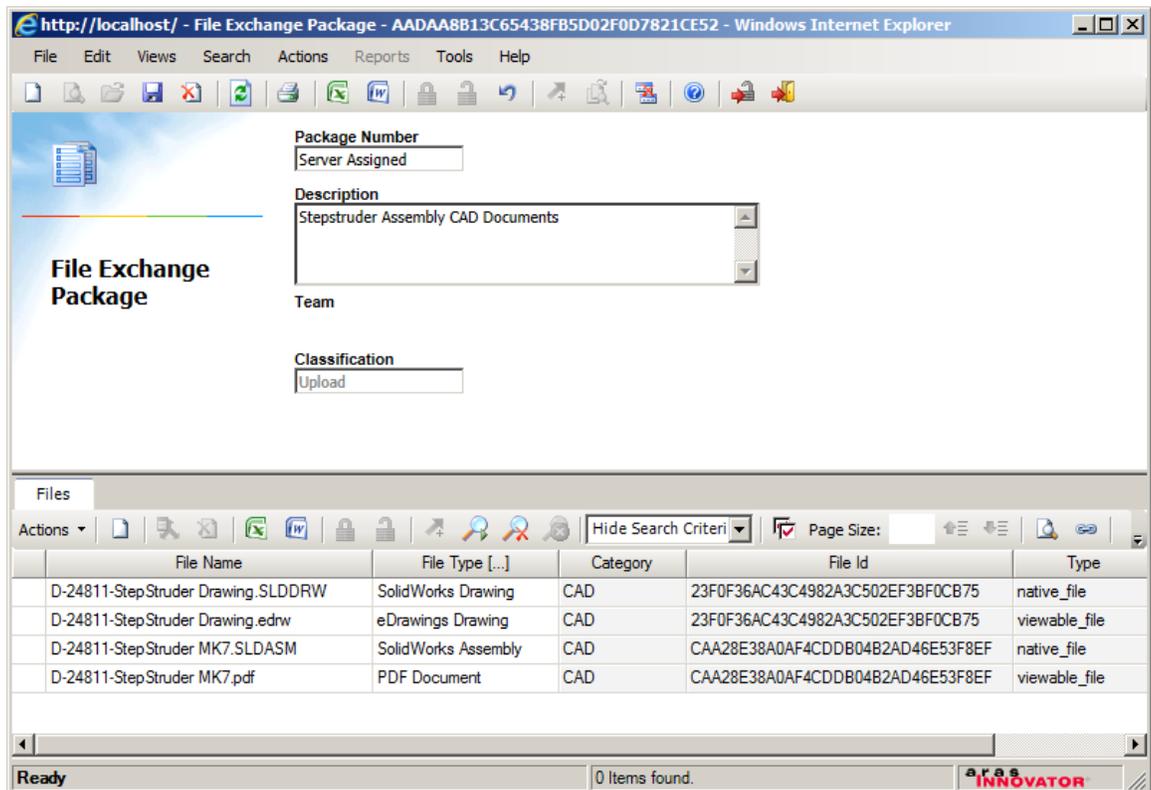
8. **Save** 💾, then **Unlock** 🔓 the File Exchange Package. You will be able to update the package later on by adding new files to it or removing existing files from it. Updates can be done as many times as you want untill the package is promoted to *Complete* state.

9. **Promote** 🡒° the File Exchange Package to *Complete*. A File Exchange Package not promoted to *Complete* can not be uploaded to TRUaras.

10. From the Menu bar go to **Actions** and select **Upload to Trubiquity.**
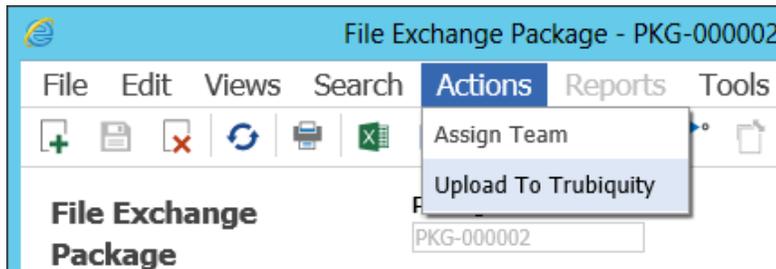
11. This will launch the **Select Recipient(s)** window. Pick one or more Trading Partners and click on the green checkmark icon ✓ to Upload the File Exchange Package to Trubiquity. The status of the upload and the corresponding **File Exchange Transaction Number** will be shown near the Status bar of the window.
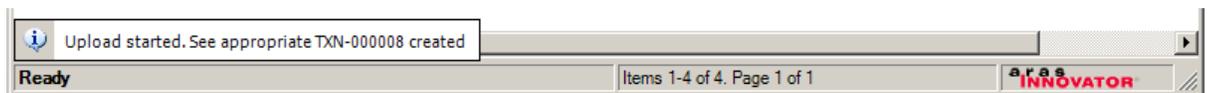
12. From the Menu Bar go to **View -> Where Used.** Double-click the File Exchange Transaction just created to view it.
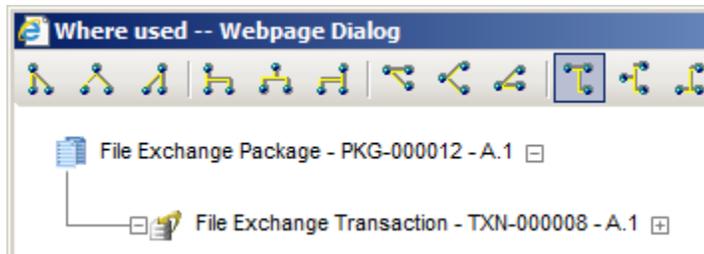
13. The **File Exchange Transaction** shows the **Transaction Status** of the entire transaction as well as the **Status** of each of the individual Files that were uploaded in the FileExchangeTxnState Tab. The **Service Specific Data** shows the xml formatted information of the transaction, the recipient and the location of the recipient. **Attempts to Execute** indicates the number of times Innovator tried to upload the file to Trubiquity. **Error Message** shows any errors that occur.

Transaction Status values could be:

- **NotStarted –** File upload has not started yet.

- **InProgress –** File upload is in progress.

- **Success** – All of the files in the File Exchange Transaction were uploaded successfully.

- **Failed –** One or more Files in the File Exchange Transaction did not upload successfully.

Status of each individual File could be:

- **NotStarted –** File upload has not started yet.

- **InProgress –** File upload is in progress.

- **Success** – File was uploaded successfully.

- **ErrorOccurred –** File did not upload successfully.

If the upload was not successful you can click on **Actions -> Try Again** to try uploading again files of the *File Exchange Package* that previously failed.

Note that files that previously were successfully uploaded are not uploaded second time.
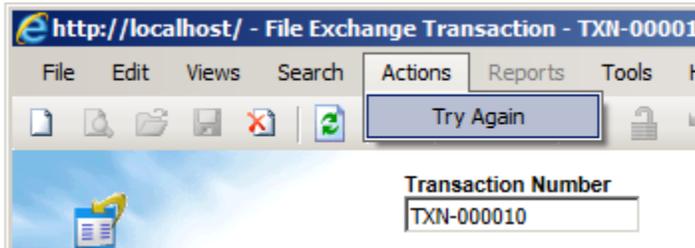
Only after all files in the upload transaction were successfully uploaded to TRUaras the recipients of the File Exchange Package will see Transactions available for download when they login to Innovator or to their online Trubiquity account.

3.3.5 Copy Files from File Exchange Packages to Items

Files from downloaded File Exchange Packages can be copied to an Item using an item's File Property or using Related Files.

1. Log on to Innovator.

2. **Edit the Item** that you want to copy files to.

3. **File Property**: If you want to copy files to an Item's File Property, **Alt-Click** in the File Property to launch the **Select File from Package** window

You will see **all Files** from **all downloaded File Exchange Packages**. You can **filter** the files by typing in values for the Package Number and/or File Name.

Select the file you want to copy and click the green checkmark icon ✓.

Related File: If you want to copy files to an Item's File relationship, Alt-Click the New Relationship icon 📄 to launch the **Select File from Package** window.
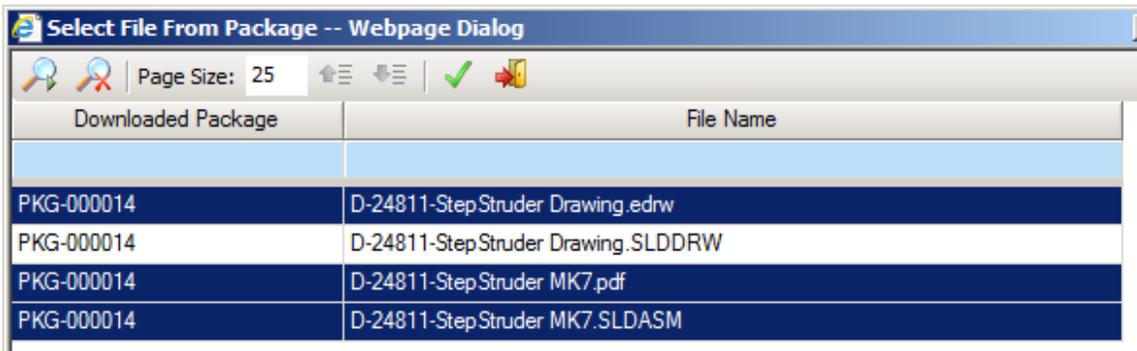
You will see **all Files** from **all downloaded File Exchange Packages**. You can **filter** the files by typing in values for the Package Number and/or File Name. You can select Files from different File Exchange Packages if you want.

Select the files you want to copy and click the green checkmark icon ✓.

Note: The files are not copied until you save the Item.

4. **Save the Item** that you edited. At this point the files that you selected are copied from the File Exchange Package to the Item.