

## Self Documenting Aras Innovator - User Guide

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### 2001 : Built in ItemType Definition Report - Test 1

**As a** Aras Practitioner , **I want to** view and print a report for an ItemType **so that** I know exactly how the ItemType is configured in the current database .

Video: <http://youtu.be/gAHir6f8qpA>

1	View report	
1	Select ItemType from Adminstration category in TOC	<ul style="list-style-type: none"> <li>ItemType grid is displayed</li> </ul>
2	Search for and select an ItemType	<ul style="list-style-type: none"> <li>ItemType is highlighted in grid</li> </ul>
3	Choose ItemType Definition from Reports in Main or context menu	<ul style="list-style-type: none"> <li>Report is displayed in window</li> <li>Multiple reports will be shown in the same window</li> </ul>

### 2002 : Built in PackageDefinition - Test 2

**As a** Aras Practitioner , **I want to** Organize configured ItemTypes implementing functionality into packages **so that** they can be exported from one database and imported to others .

Video: <http://youtu.be/s9zhG7HWE-g>

1	View PackageDefinition	
1	Select Configuraion/PackageDefinition from the Adminisstration category in th TOC	<ul style="list-style-type: none"> <li>PackageDefinitions are shown in the main grid</li> </ul>
2	Select a Package Definition from the main grid and choose View or Edit from the Main or context menus	<ul style="list-style-type: none"> <li>Window opens showing Groups in the relationship grid</li> </ul>
3	Select a group in the relationship grid and select View or Edit from the Relationship toolbar or context menu	<ul style="list-style-type: none"> <li>Window opens showing PackageElements in the relationship grid</li> </ul>

### 2003 : Built in DatabaseUpgrade - Test 3

**As a** Aras Practitioner , **I want to** see what packages have been applied to a database **so that** I know its history .

Video: <http://youtu.be/bliGXt-ExYc>

1	<b>View Package Imports</b>	
1	Select Configuration/DatabaseUpgrades from the Administration category in the TOC	<ul style="list-style-type: none"><li>DatabaseUpgrade ItemType is shown in the main grid</li></ul>
2	Search and sort upgrades as required	<ul style="list-style-type: none"><li>Upgrades are presented as required</li></ul>
3	Select an Item in the grid and open it for View or Edit	<ul style="list-style-type: none"><li>Item window is displayed in new tab</li></ul>

### 2004 : Built in History Template - Test 4

**As a** Aras Practitioner , **I want to** track the history of selected ItemTypes **so that** record of events for individual Items can be recorded in the database .

Video: <http://youtu.be/GkS3VxMN5J4>

1	<b>View History for an Item</b>	
1	Open any Item, use Part for an example	<ul style="list-style-type: none"><li>Item is displayed in a window in a new tab</li></ul>
2	Choose Views/History from window menu	<ul style="list-style-type: none"><li>History dialog opens</li></ul>
2	<b>Configure History for and ItemType</b>	
1	Create a new History Template Item where Default where required	<ul style="list-style-type: none"><li>New History Template is in the database</li></ul>
2	Edit the ItemType, select a History Template on the Form and Save the ItemType	<ul style="list-style-type: none"><li>History will be recorded according to the Template for all new and edited Items in the future</li></ul>

### 2005 : ItemType Diagram - Test 5

**As a** Aras Practitioner , **I want to** See a diagram of relationships for a selected ItemType or PackageDefinition **so that** I know exactly what the relationship names

and property names for the data model .

Video: <http://youtu.be/yuKs0qYUuKw>

<b>View Diagram for Package Definition</b>		
1	Select PackageDefnition from Adminstration/Configuration in TOC	<ul style="list-style-type: none"><li>PackageDefinitions are shown in main grid</li></ul>
2	Select ItemType Diagram from Main or context menu	<ul style="list-style-type: none"><li>Window opens showing diagram</li><li>Large packages may take a while to display</li></ul>
<b>1 View Diagram for ItemType</b>		
1	Select any ItemType from the TOC	<ul style="list-style-type: none"><li>Selected ItemType is displayed in main grid</li></ul>
2	Select ItemType Diagram from Main or context menu	<ul style="list-style-type: none"><li>Window opens showing diagram as svg</li><li>ItemTypes with deep structure may take a while to display</li></ul>
3	Use Ctrl+ and Ctrl- to Zoom	<ul style="list-style-type: none"><li>Display zooms in and out</li><li>Reset browser zoom after viewing diagram as necessary</li></ul>
4	Use scroll bars to pan vertically or horizontally	<ul style="list-style-type: none"><li>Display pans</li></ul>
<b>2 Alternate view from ItemType ItemType</b>		
1	Select ItemType from Administration category in TOC	<ul style="list-style-type: none"><li>ItemTypes are displayed in main grid</li></ul>
2	Select any ItemType in the main grid	<ul style="list-style-type: none"><li>Selected ItemType is highlighted</li></ul>
3	Select ItemType Diagram from Main or context menu	<ul style="list-style-type: none"><li>Window opens showing diagram</li></ul>

## 2006 : Configuration Report - Test 5

**As a** Aras Practitioner , **I want to** know what has changed in a database while I have been working in it **so that** I can select and export Items to be shared with others, and leave behind any changes not needed .

Video: <http://youtu.be/aTRC3c8py-E>

1	View Report	
1	Select DatabaseUpgrades from Administration/Configuration category in the TOC, and run search	<ul style="list-style-type: none"> <li>DatabaseUpgrades are displayed in the main grid</li> </ul>
2	Click applied_on column header	<ul style="list-style-type: none"> <li>Upgrades are sorted by descending datetime</li> </ul>
3	Select the last DatabaseUpgrade that was used to create the current database	<ul style="list-style-type: none"> <li>Database upgrade is highlighted in main grid</li> </ul>
4	Choose Configuration Report from Main or context menu	<ul style="list-style-type: none"> <li>Report opens</li> <li>For many changes the report may take a while to open</li> </ul>
5	For other datetimes copy and paste report grid to Excel	<ul style="list-style-type: none"> <li>All columns including datetimes can be filtered using Excel functionality</li> </ul>

## 2007 : What Package Am I In - Test 7

**As a** Aras Practitioner , **I want to** find out which PackageDefinition is an Item is in **so that** I can resolve PackageDefinition issues .

Video: [http://youtu.be/cVAqG\\_qLSm8](http://youtu.be/cVAqG_qLSm8)

1	Show PackageDefinition	
1	Select any Item from TOC	<ul style="list-style-type: none"> <li>ItemType is displayed in main grid with one Item selected and highlighted</li> </ul>
2	Select What Package Am I In from Reports in Main menu (its a generic report and not in context menu)	<ul style="list-style-type: none"> <li>Report opens in a new tab</li> </ul>

## 2008 : List and Sequence Where Used - Test 8

**As a** Aras Practitioner , **I want to** find where Lists and Sequences are used in ItemTypes **so that** I can plan PackageDefintions and implementation details, (Standard Where Used does not work for List or Sequence) .

Video: <http://youtu.be/zc5Bus8tSx4>

1	Show where used	
1	Select a List or Sequence from	<ul style="list-style-type: none"> <li>Item is highlighted in main grid</li> </ul>

	Administration category in TOC	
2	Choose ListSequenceWU from Reports in Main menu or context menu	<ul style="list-style-type: none"> <li>Report is opened in a new tab</li> </ul>

## 2010 : Configuration Manager - Test 10

**As a** Aras Practitioner , **I want to** work through a list of what has changed in a database while I have been working on it **so that** I can determine what actions are required to export the changes that need to be shared with others, and export them from the UI, and leave behind anything not required .

Video: <http://youtu.be/wcDZDv-opsA>

<b>1</b>	<b>Create a Configuration Mangager Item</b>	
1	Select ConfigurationManagere from Administration/Configuration category in the TOC	<ul style="list-style-type: none"> <li>ConfigurationManager items are shown in the main grid</li> </ul>
2	Select Create New Item from main toolbar	<ul style="list-style-type: none"> <li>New ItemWindow opens</li> </ul>
3	Enter name and optional owner	<ul style="list-style-type: none"> <li>Fields are populated on Form</li> </ul>
4	Select a DatabaseUpgrade using the ellipsis for compare_upgrade field	<ul style="list-style-type: none"> <li>Search dialog for DatabaseUpgrade opens</li> </ul>
5	Search and double click Applied On to sort by descending date, select a Item	<ul style="list-style-type: none"> <li>DatabaseUpgrade keyed name appears in Field</li> </ul>
6	Save the Item	<ul style="list-style-type: none"> <li>Applied On and Description Fields are populated</li> </ul>
7	Press the Populate button on the Form	<ul style="list-style-type: none"> <li>Changes made since the selected DatabaseUpgrade are populated as ConfigurationElements on the Server</li> </ul>
8	Press the Refresh Item icon in the main toolbar	<ul style="list-style-type: none"> <li>ConfigurationElements are shown in the relationships grid</li> <li>/// TODO refresh automatically on Populate to eliminate this step</li> </ul>
9	Enable Search in the relationships grid to resolve changed Items as required	<ul style="list-style-type: none"> <li>Note that Items not in a package have x_NOT_in_package in the package_definition column</li> </ul>

<b>2</b>	<b>MultiEdit Items in grid</b>	
1	Select one or more rows in the relationship grid	<ul style="list-style-type: none"> <li>Selected rows are highlighted</li> </ul>
2	Select cm_ce_multi_edit from relationship Actions or context menu	<ul style="list-style-type: none"> <li>Edit dialog opens</li> </ul>
3	Select values for all properties on the Form, click Edit Selected Items button	<ul style="list-style-type: none"> <li>Selected Items are Edit</li> </ul>
4	Save the Item if desired	<ul style="list-style-type: none"> <li>Window is refreshed</li> </ul>
<b>3</b>	<b>Add to PackageDefinition</b>	
1	Select one or more rows of the same ItemType (PackageGroup) in the relationship grid	<ul style="list-style-type: none"> <li>Selected rows are highlighted</li> </ul>
2	Select Add To Package Definition from relationship Actions or context menu	<ul style="list-style-type: none"> <li>Standard Dialog Opens</li> </ul>
3	Select PackageDefinition or create New, Click OK	<ul style="list-style-type: none"> <li>Success message in status bar</li> </ul>
4	Click Refresh Item in Main toolbar	<ul style="list-style-type: none"> <li>ConfigurationElement is updated to show new PackageDefinition</li> </ul>
<b>4</b>	<b>Show Item for selected Element</b>	
1	Select an Item in the relationship grid	<ul style="list-style-type: none"> <li>Item is highlighted in the grid</li> </ul>
2	Choose Show Element from Actions in relationship toolbar or context menu	<ul style="list-style-type: none"> <li>Window opens showing the selected Item</li> </ul>

### 2011 : Audit Package Definition - Test 11

**As a** Aras Practitioner , **I want to** check the contents of a PackageDefinitions **so that** multiple unresolved reference errors can be avoided when packages are Imported .

Video: [http://youtu.be/waJGmN-QL\\_E](http://youtu.be/waJGmN-QL_E)

<b>1</b>	<b>Audit Packages</b>	
1	Create a Configuration Manager and resolve any 'not in package' or other	<ul style="list-style-type: none"> <li>Configuration Manager is saved and updated</li> </ul>

	issues	
2	Select one row in the relationship grid for each PackageDefinition to be audited together	<ul style="list-style-type: none"> <li>One or more rows are selected in the relationship grid</li> </ul>
3	Click the Audit button on the Form	<ul style="list-style-type: none"> <li>Audit Report opens in a new window</li> </ul>
4	Look for cells in the In Package column are blank	<ul style="list-style-type: none"> <li>Note that Lists for PolyItems, RelationshipItemTypes, and some core Items, eg List 'Item Behavior', which are not in packages can be ignored</li> <li>/// TODO Eliminate Items which can be ignored automatically</li> </ul>
5	Make any necessary changes and repeat these steps	<ul style="list-style-type: none"> <li>Package is ready to export</li> </ul>

## 2012 : Export Selected Items - Test 12

**As a** Aras Practitioner , **I want to** export Items directly from the UI **so that** I don't have to use a separate tool, and it is easier to select just the Items I want to export .

**Video:** <http://youtu.be/5xqv-JsXo04>

<b>1</b>	<b>Export Selected Items</b>	
1	Create a Configuration Manager, resolve and select Items to be exported, and Save the Item	<ul style="list-style-type: none"> <li>do_export column is checked for Items to be exported</li> </ul>
2	Click the Export button on the Form	<ul style="list-style-type: none"> <li>Selected Items are exported and zipped on the server</li> <li>The zip file is added to the Vault and downloaded to the Download folder selected for your browser</li> <li>The Zip file is opened on the client so that you can copy export and manifest file of your choosing</li> </ul>