



## Overview

Many organizations have a class tree defined on an ItemType that includes custom forms for the classes. In this case, users are generally trained to add the new item and then select the Classification / Type control on the form first so that they can be presented with the correct class specific form before they start filling in metadata. This approach doesn't feel natural. Users should be prompted immediately with the class picker when they decide to add a new item. This is exactly what the Razorleaf Class Picker solution does.

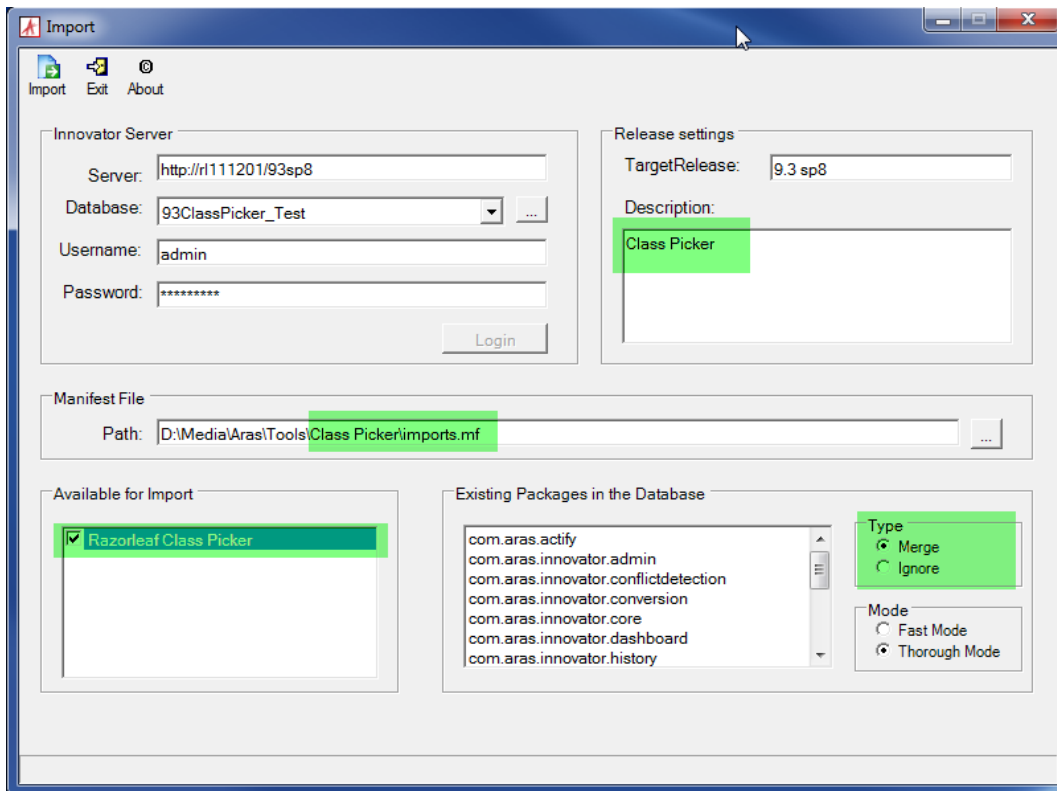
The Razorleaf Class Picker solution for Aras Innovator is designed to prompt the user to select the class prior to the item's form ever being displayed. This approach saves the user a few clicks and has a much more natural feeling when adding items. The solution uses the standard Innovator interface of selecting the class and the solution respects all "Can Add" permissions defined on the ItemType.

Razorleaf has made its Class Picker solution available to the Aras community for free. It is a great addition to environments that contain class specific forms because it presents the correct form to the user right from the beginning. The solution can be hooked into any ItemType with a class structure. You can find the solution in the Community Projects section of the Aras website by searching for Class Picker. The download includes instructions for adding it to your environment.

## Implementation

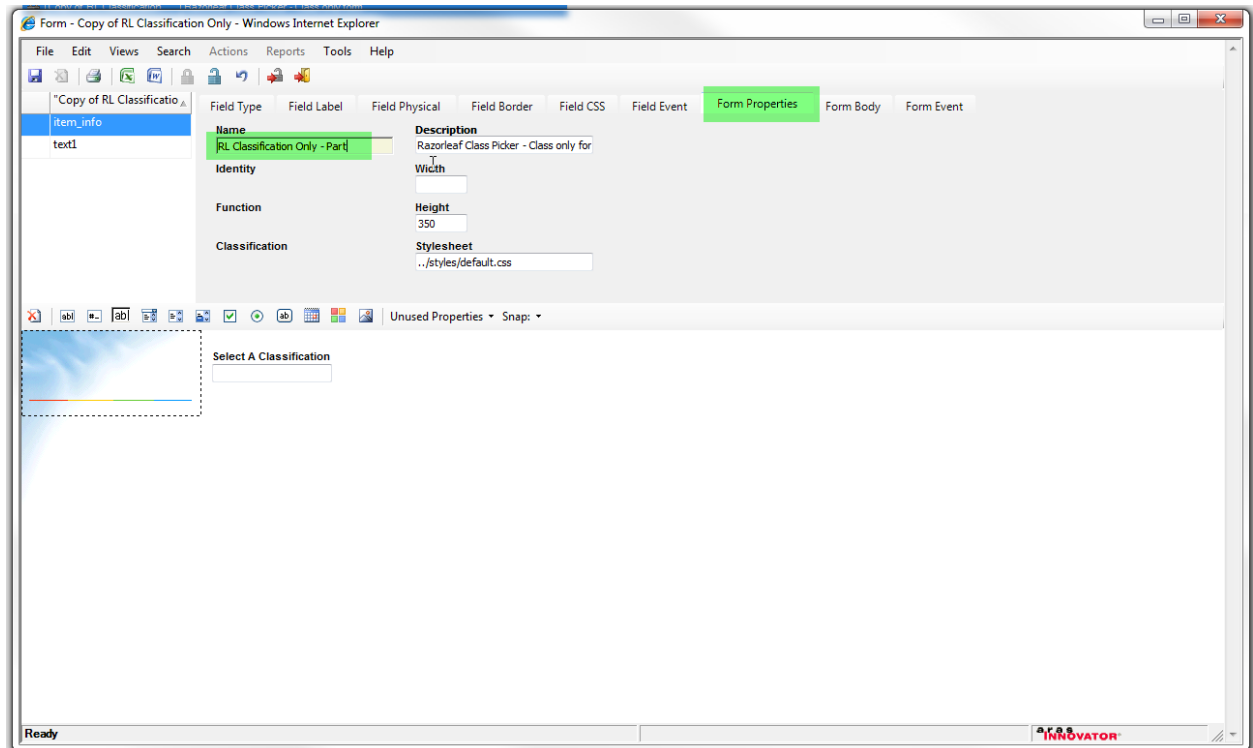
The solution package imports without applying it to any specific ItemType. Follow the steps below to implement the Class Picker on the Part ItemType. The steps can be applied to any or multiple ItemTypes by repeating the steps for the appropriate ItemTypes.

1. Import the Class Picker package into your environment with the following options

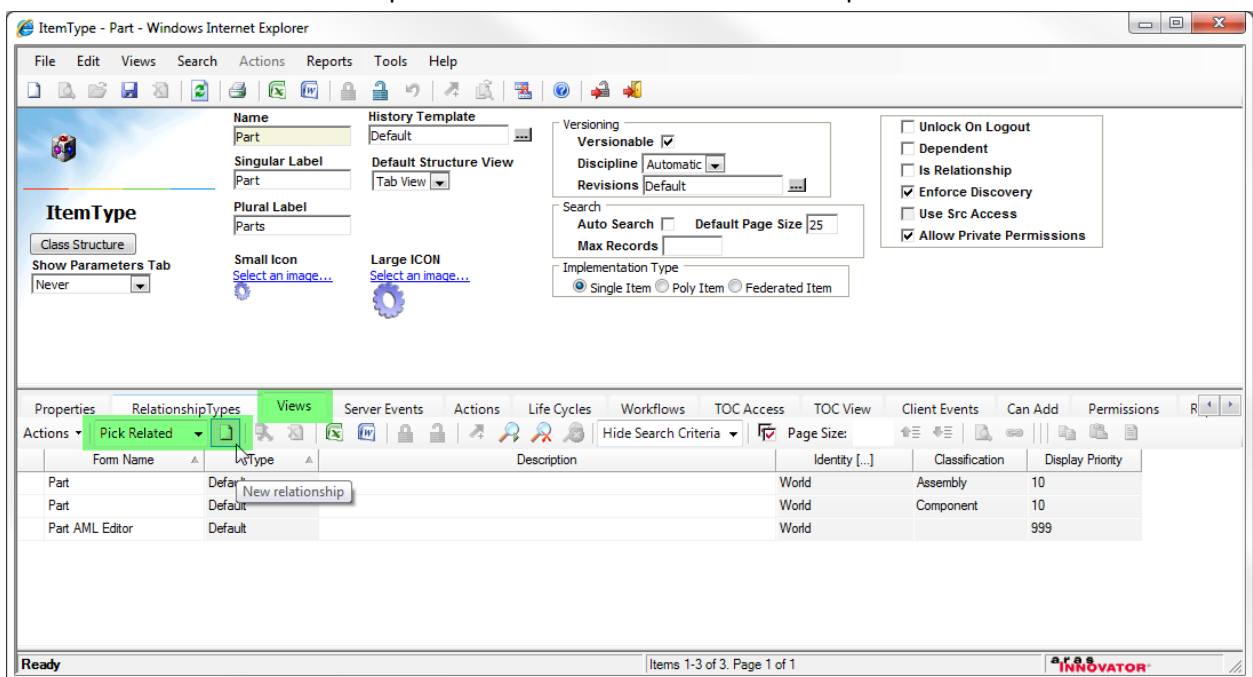


2. Close the import tool
3. Login to Innovator as a user with administrative privileges
4. Search for the form RL Classification Only. Right click on the form and select Save As. The copy will be locked and displayed for editing.

5. Select the Form Properties tab and set the Name property to RL Classification Only – Part

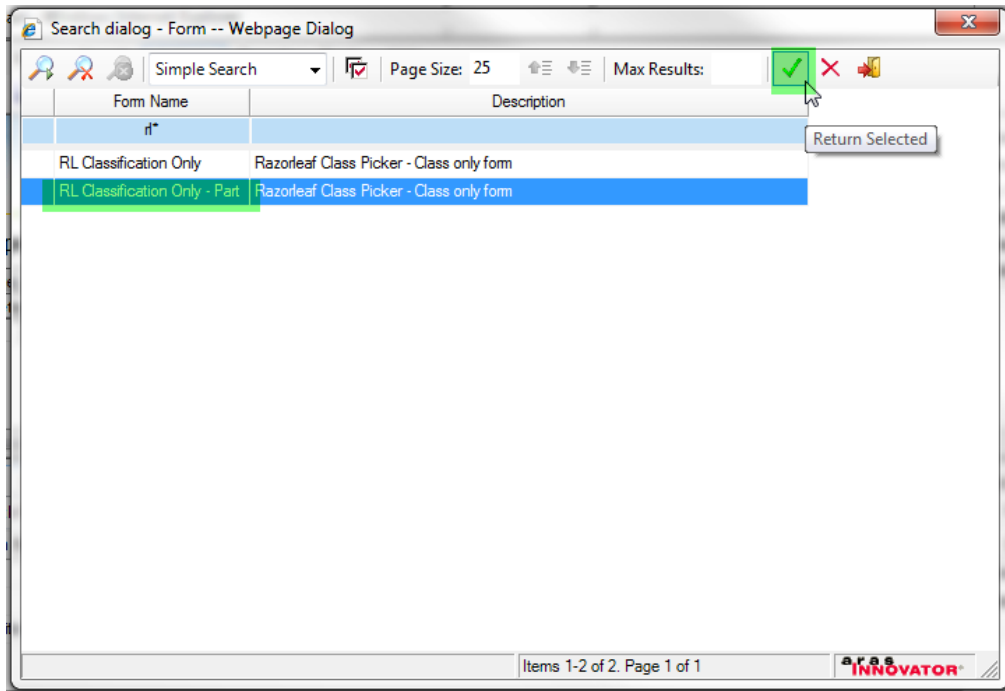


6. Save, unlock, and close the form
7. Edit the Part ItemType
8. Select the Views tab
9. Select Pick Related from the dropdown and select the New Relationship toolbar button

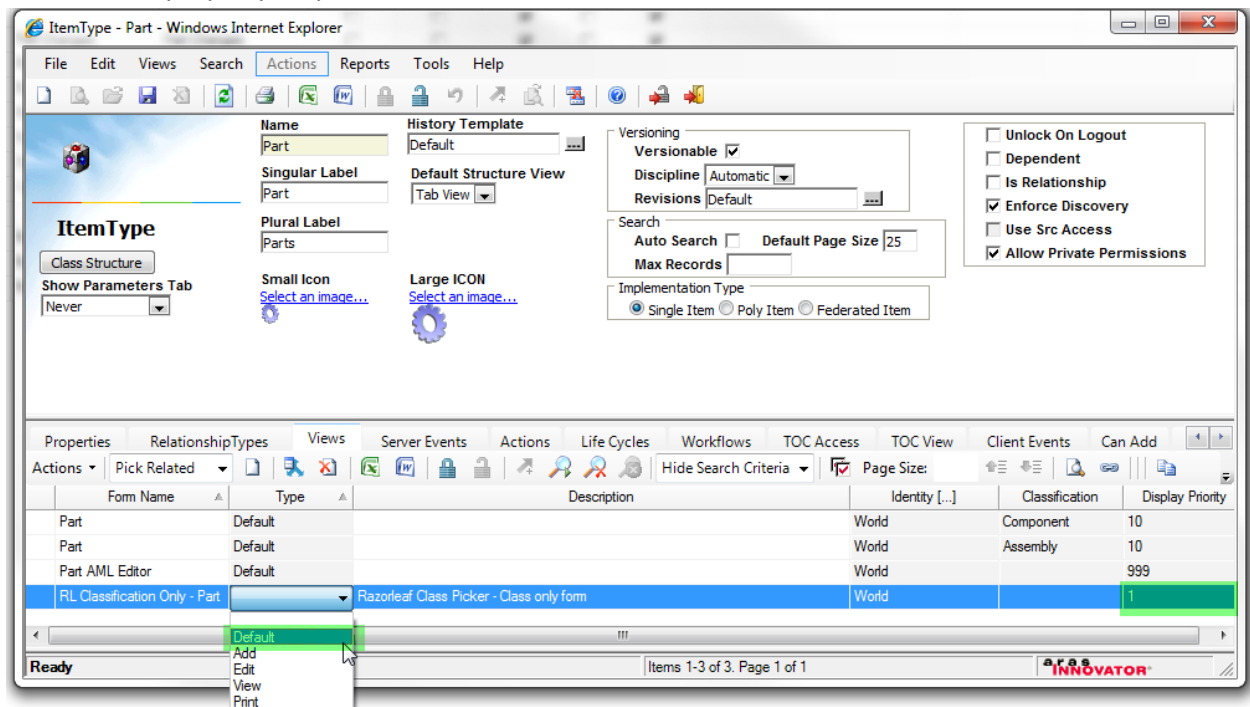


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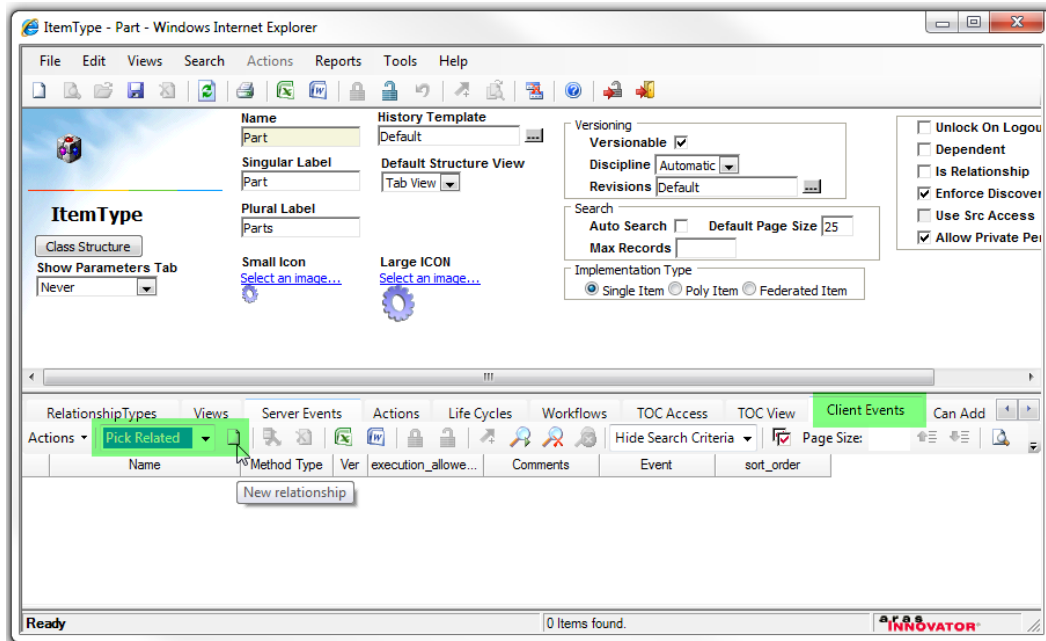
10. Select the RL Classification Only – Part form and the Return Selected button



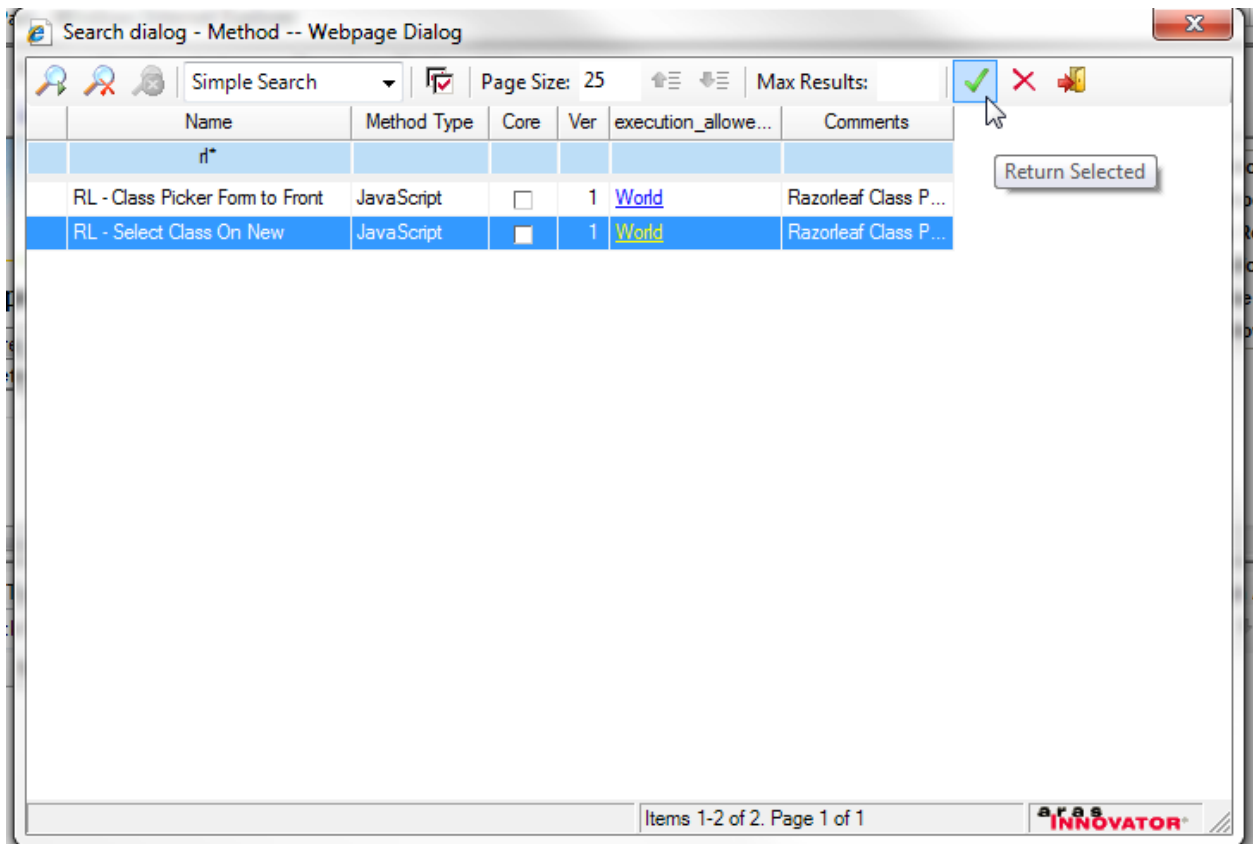
11. Set the Type to Default. Leave the classification value blank. Set the Display Priority to 1. Typically, there should only be one form with a display priority of 1. If there are other forms with a priority of one, then adjust their priority or remove the row from the Views tab. This will enable the form that has the classification property only if a user deletes the classification value from an item.



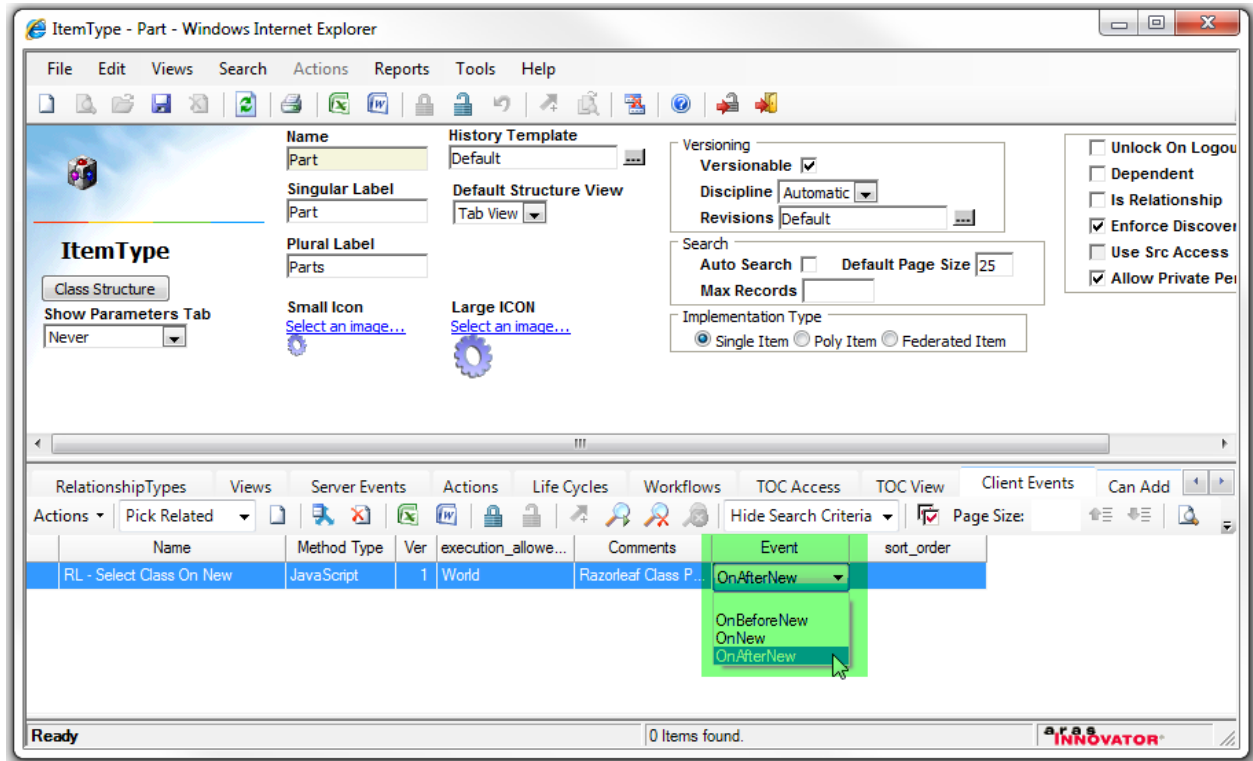
12. Select the Client Events tab of the Part ItemType. Select Pick Related from the toolbar and the New Relationship button



13. Select the RL – Select Class On New method and the Return Selected button

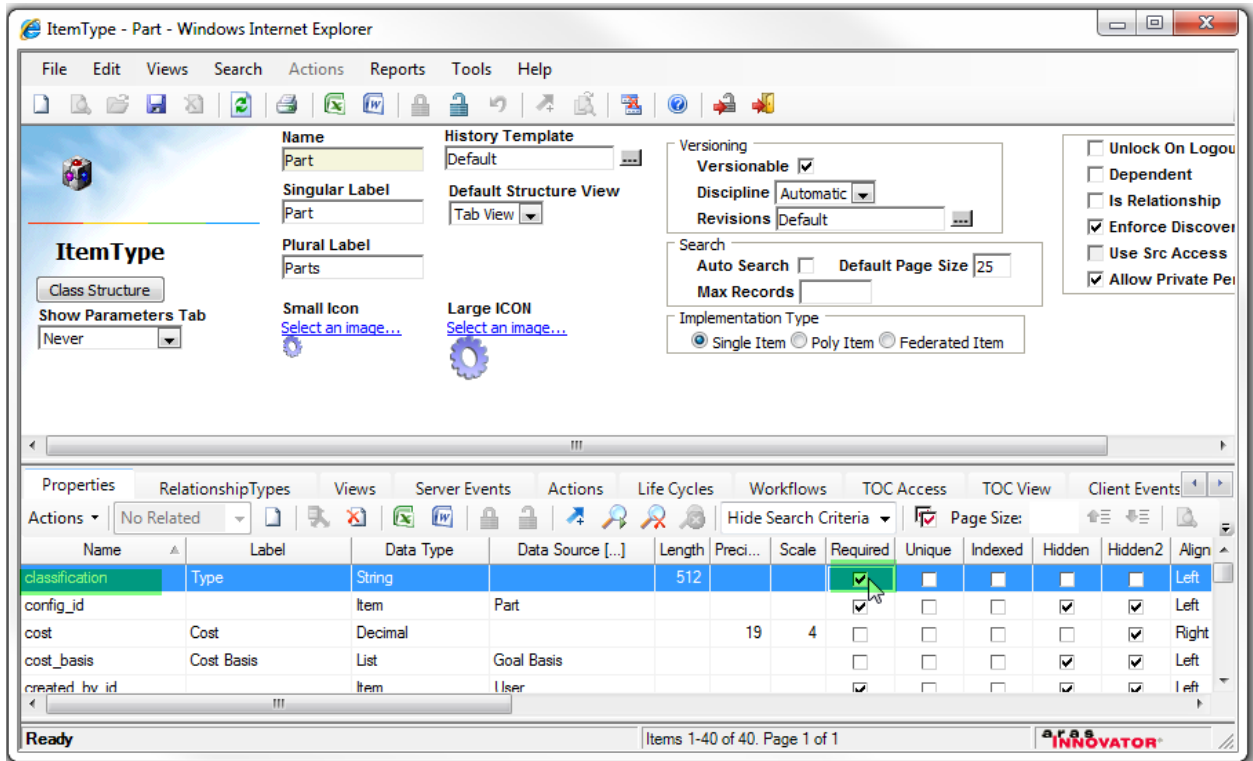


14. Set the Event to OnAfterNew



15. While not required, it is probably desirable to make the classification property a required property. Any Parts that exist without a classification will need to be remediated before enforcing that classification is

required.

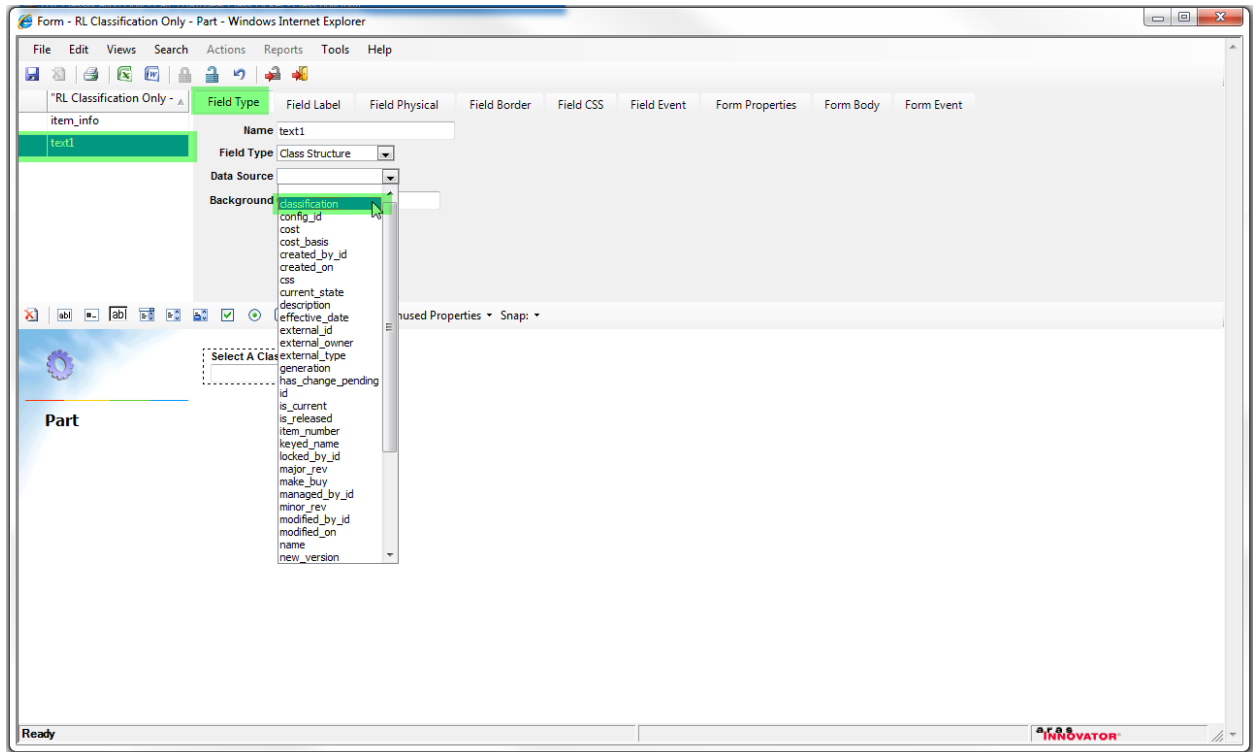


Name	Label	Data Type	Data Source [...]	Length	Preci...	Scale	Required	Unique	Indexed	Hidden	Hidden2	Align
classification	Type	String		512			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Left
config_id		Item	Part				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Left
cost	Cost	Decimal			19	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Right
cost_basis	Cost Basis	List	Goal Basis				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Left
created_by_id		Item	User				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Left

16. Save, Unlock, and Close the Part ItemType.

17. Edit the form RL Classification Only – Part

18. Select the Select A Classification property and set the Data Source property to classification.



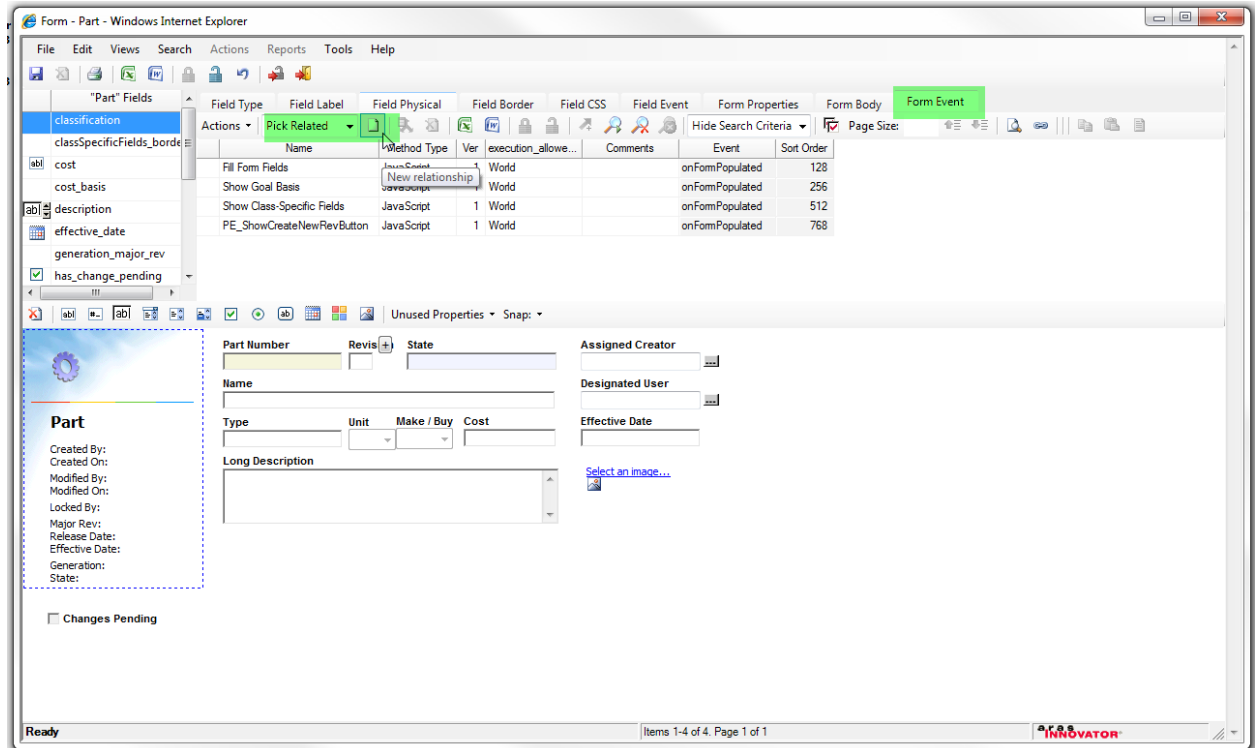
19. Save, unlock, and close the form RL Classification Only – Part form.

20. For each class specific form associated with the Part ItemType, follow the below steps

- Edit the form
- Select the Form Event tab



- c. Select Pick Related from the dropdown and the Add New Relationship button from the toolbar



Form - Part - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Field Type Field Label Field Physical Field Border Field CSS Field Event Form Properties Form Body Form Event

classification classSpecificFields\_borde

cost cost\_basis

description effective\_date

generation\_major\_rev

has\_change\_pending

Part

Created By:  
Created On:  
Modified By:  
Modified On:  
Locked By:  
Major Rev:  
Release Date:  
Effective Date:  
Generation:  
State:

Changes Pending

Part Number Revis State Assigned Creator

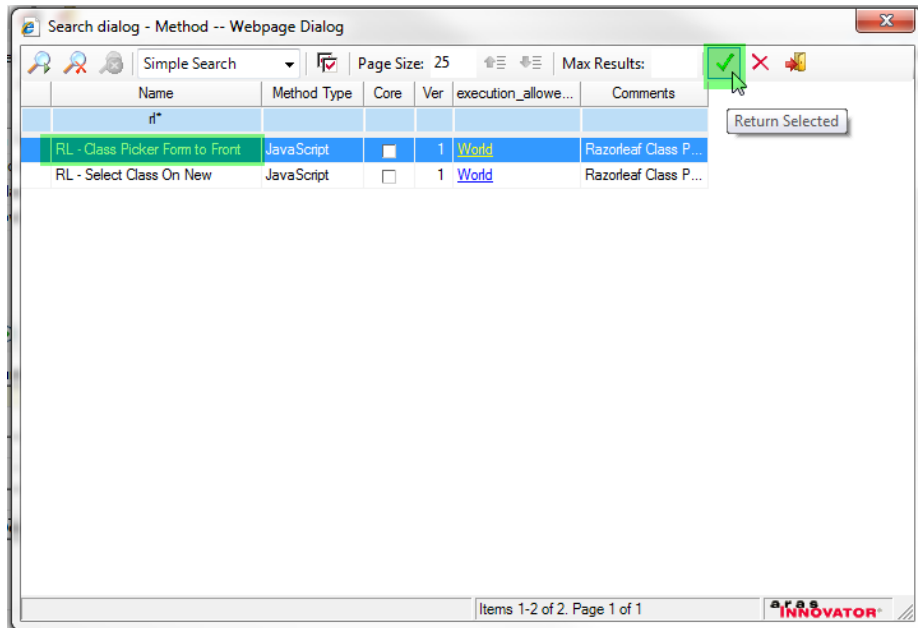
Name Designated User

Type Unit Make / Buy Cost Effective Date

Long Description Select an image...

Ready Items 1-4 of 4. Page 1 of 1 INNOVATOR

- d. Select the RL – Class Picker Form to Front method and the Return Selected button



Search dialog - Method -- Webpage Dialog

Simple Search Page Size: 25 Max Results:

Name Method Type Core Ver execution\_allow... Comments

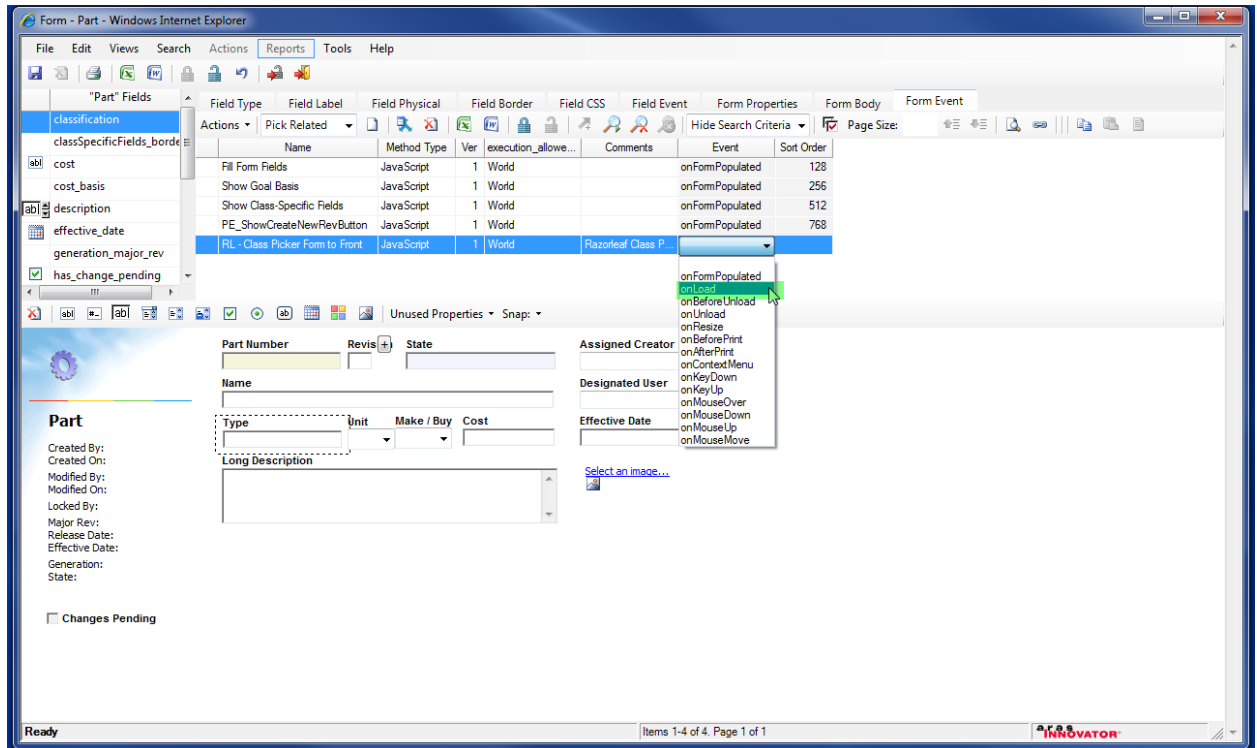
RL - Class Picker Form to Front JavaScript 1 World Razorleaf Class P...

RL - Select Class On New JavaScript 1 World Razorleaf Class P...

Return Selected

Items 1-2 of 2. Page 1 of 1 INNOVATOR

e. Set the event to onLoad

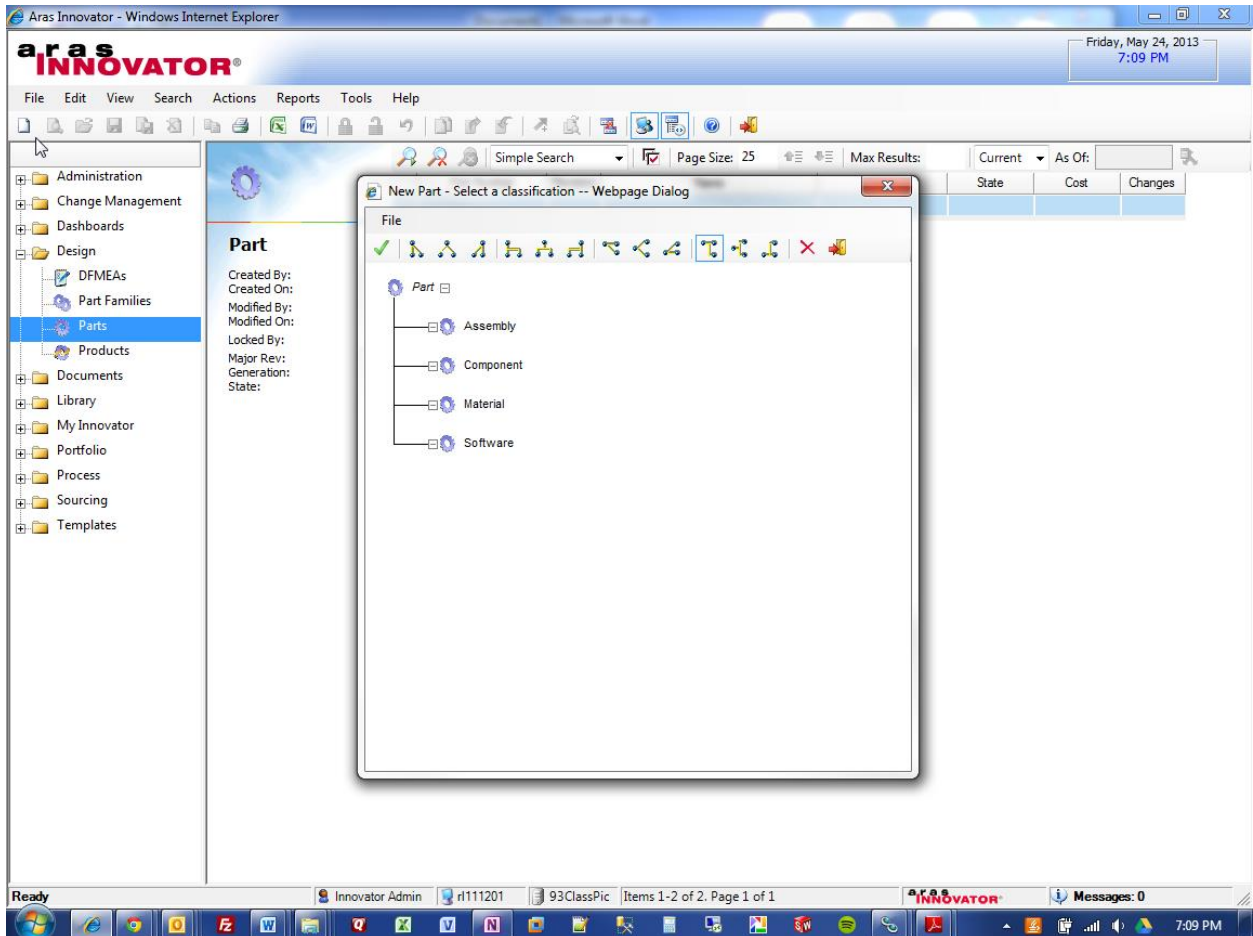


f. Save, Unlock, and Close the Form

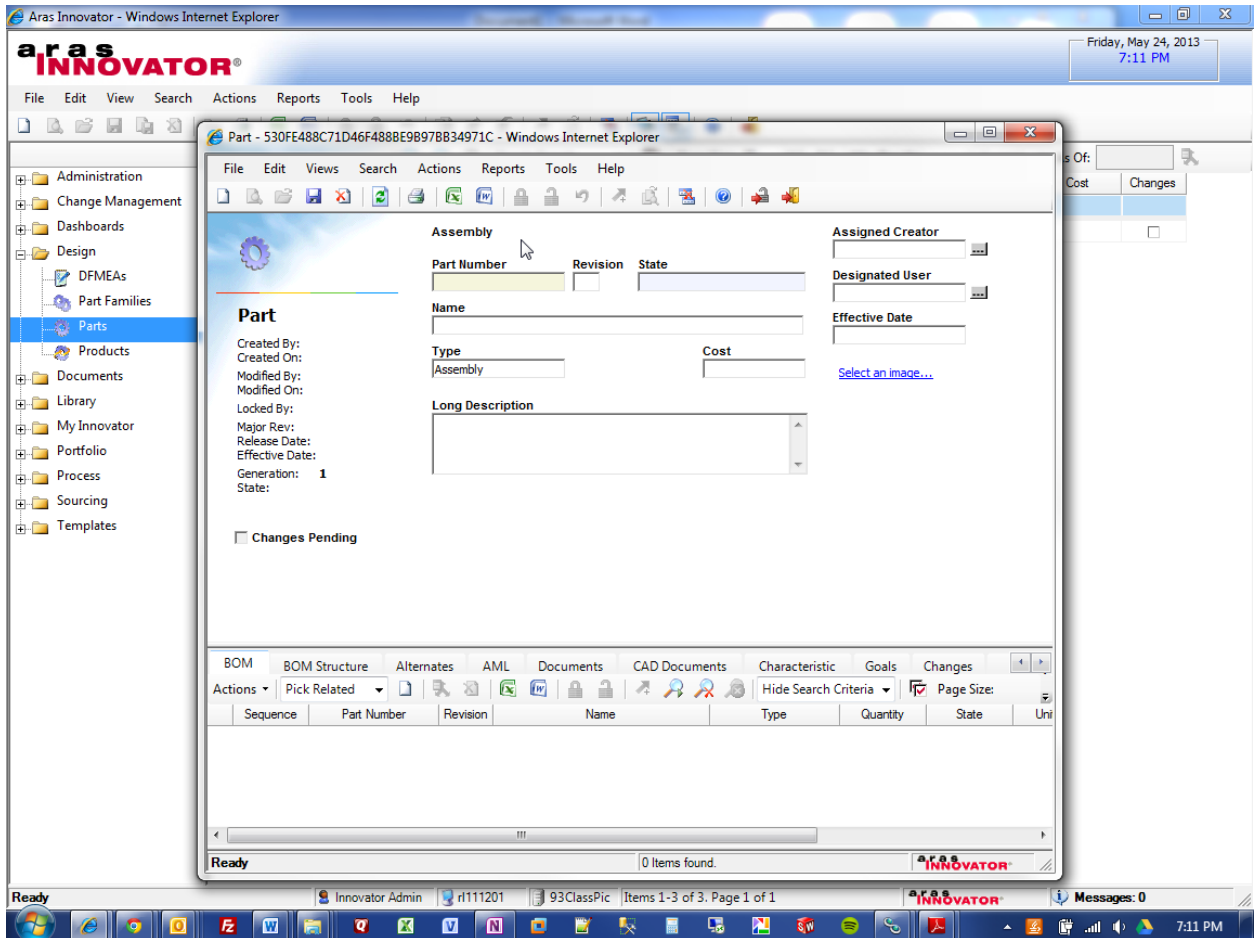
g. Repeat for each class specific form

## Usage 1 – Add New Part

1. Add a new Part item by selecting the Create a New Item toolbar button and immediately be presented with the Class Picker



2. Select the desired class and be presented with the classification specific form

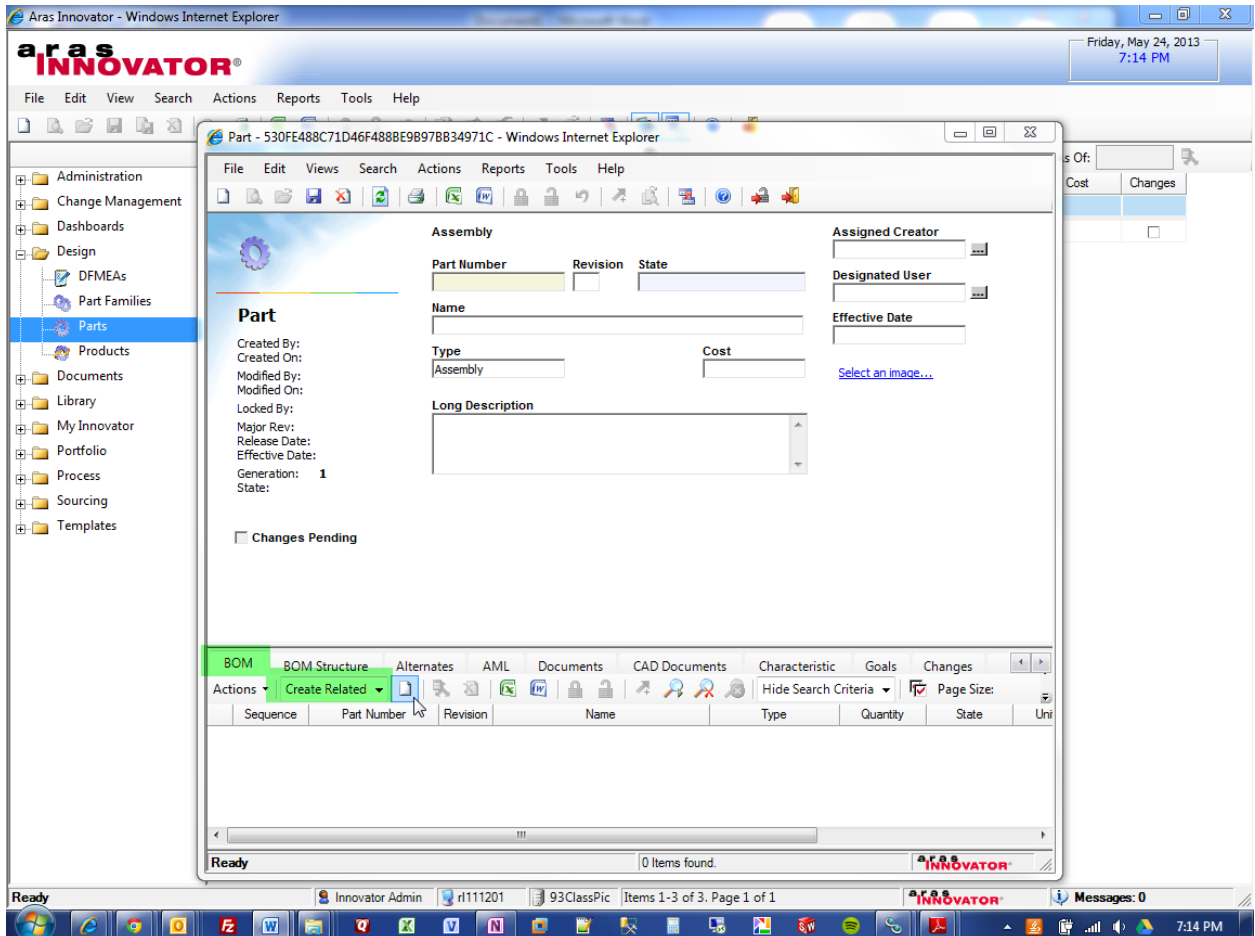


The screenshot displays the Aras Innovator web application interface. The main window shows the 'Part' form for a specific assembly. The form includes the following fields and sections:

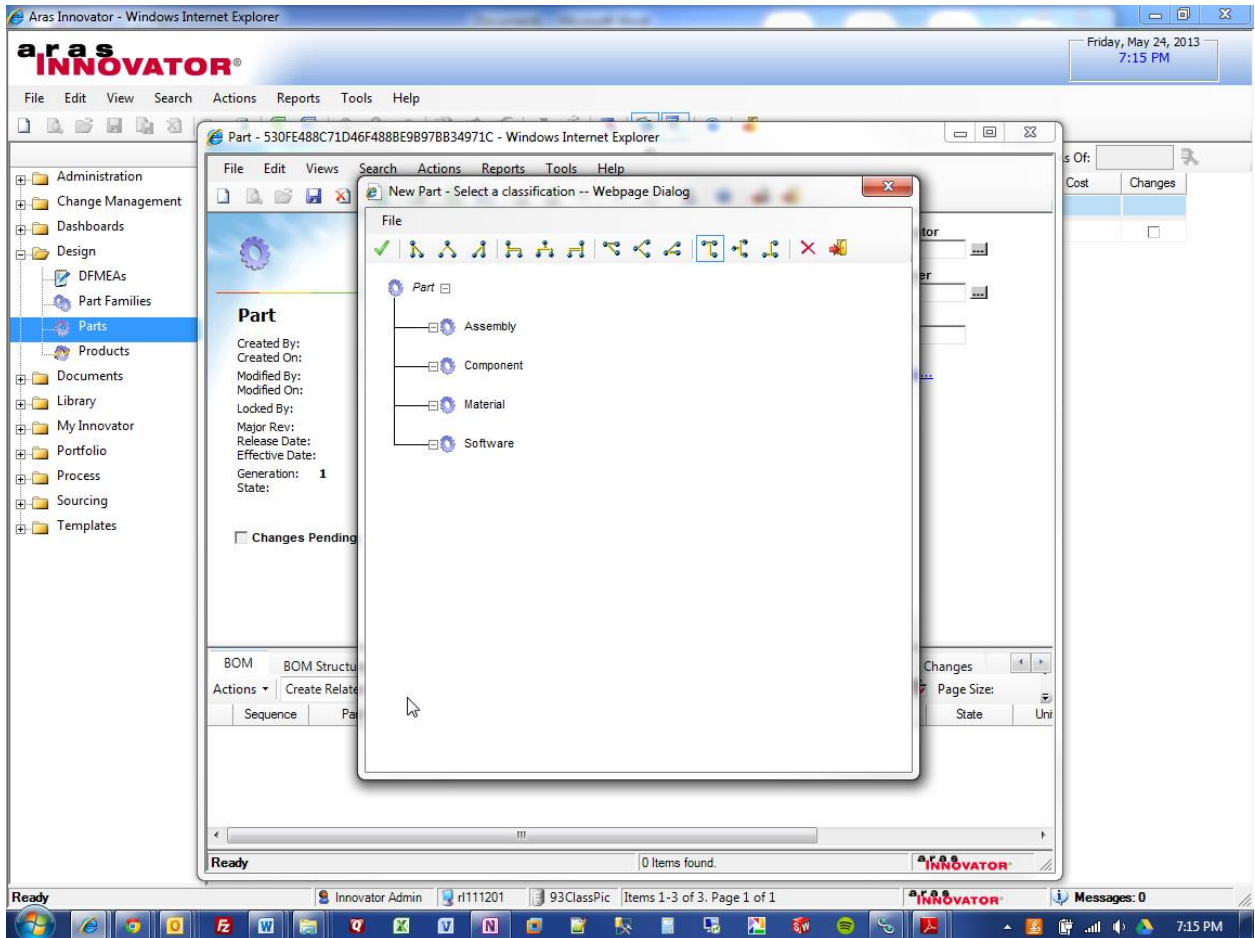
- Assembly Section:**
  - Part Number: [Text Field]
  - Revision: [Text Field]
  - State: [Text Field]
- Part Section:**
  - Name: [Text Field]
  - Type: [Text Field, value: Assembly]
  - Cost: [Text Field]
  - Long Description: [Text Area]
- Metadata Section:**
  - Created By: [Text Field]
  - Created On: [Text Field]
  - Modified By: [Text Field]
  - Modified On: [Text Field]
  - Locked By: [Text Field]
  - Major Rev: [Text Field]
  - Release Date: [Text Field]
  - Effective Date: [Text Field]
  - Generation: 1
  - State: [Text Field]
- Actions Section:**
  - Changes Pending: ☐
- Navigation Sidebar:**
  - Administration
  - Change Management
  - Dashboards
  - Design
    - DFMEAs
    - Part Families
    - Parts** (Selected)
    - Products
  - Documents
  - Library
  - My Innovator
  - Portfolio
  - Process
  - Sourcing
  - Templates
- Bottom Panel:**
  - BOM Structure, Alternates, AML, Documents, CAD Documents, Characteristic, Goals, Changes
  - Actions: Pick Related, [Icons]
  - Sequence, Part Number, Revision, Name, Type, Quantity, State, Unit
  - 0 Items found.

## Usage 2 – Add New BOM Item

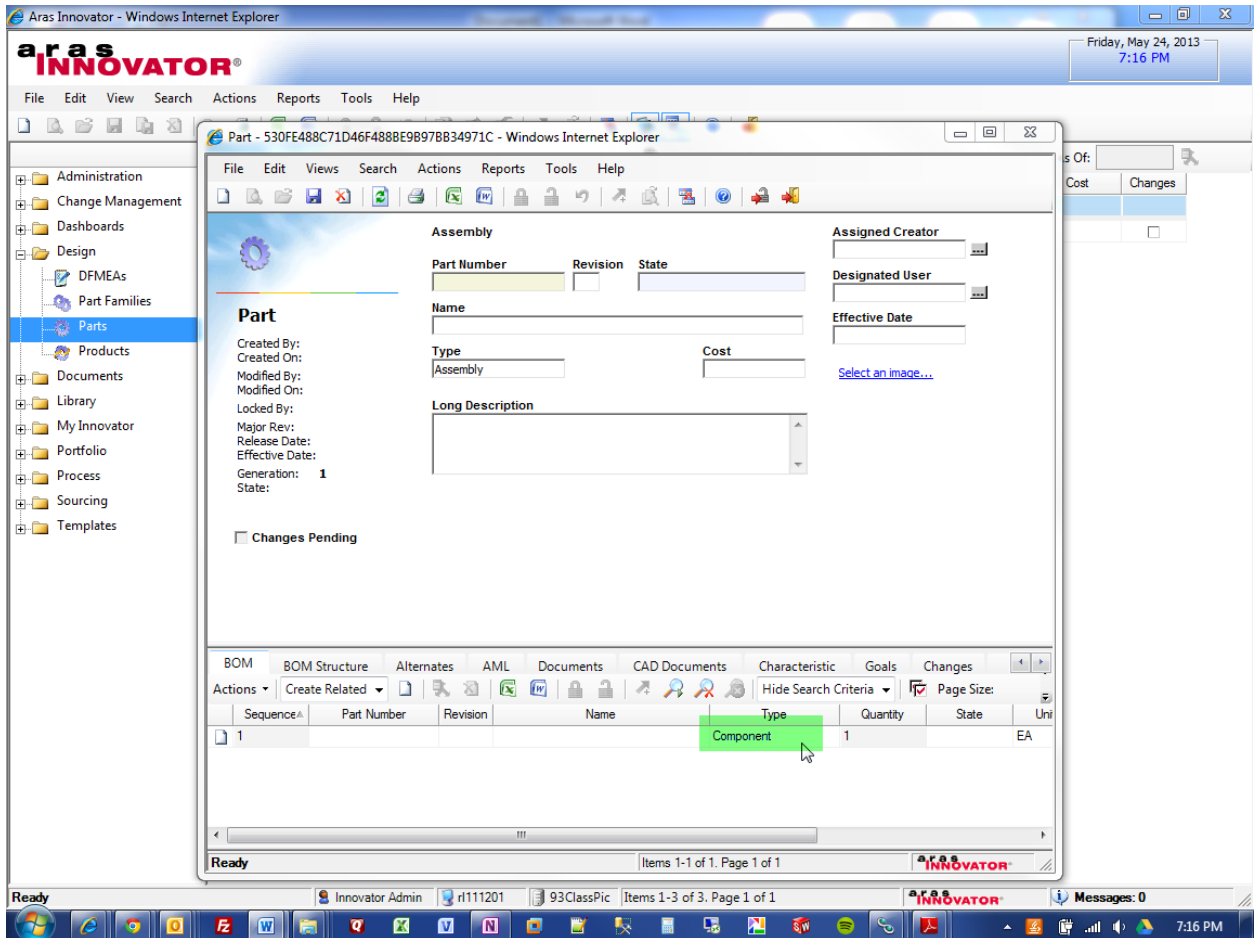
1. Select the BOM tab of the Part
2. Select Create Related from the dropdown and select the Create New Relationship button



3. Immediately be presented with the Class Picker. Select the desired class.

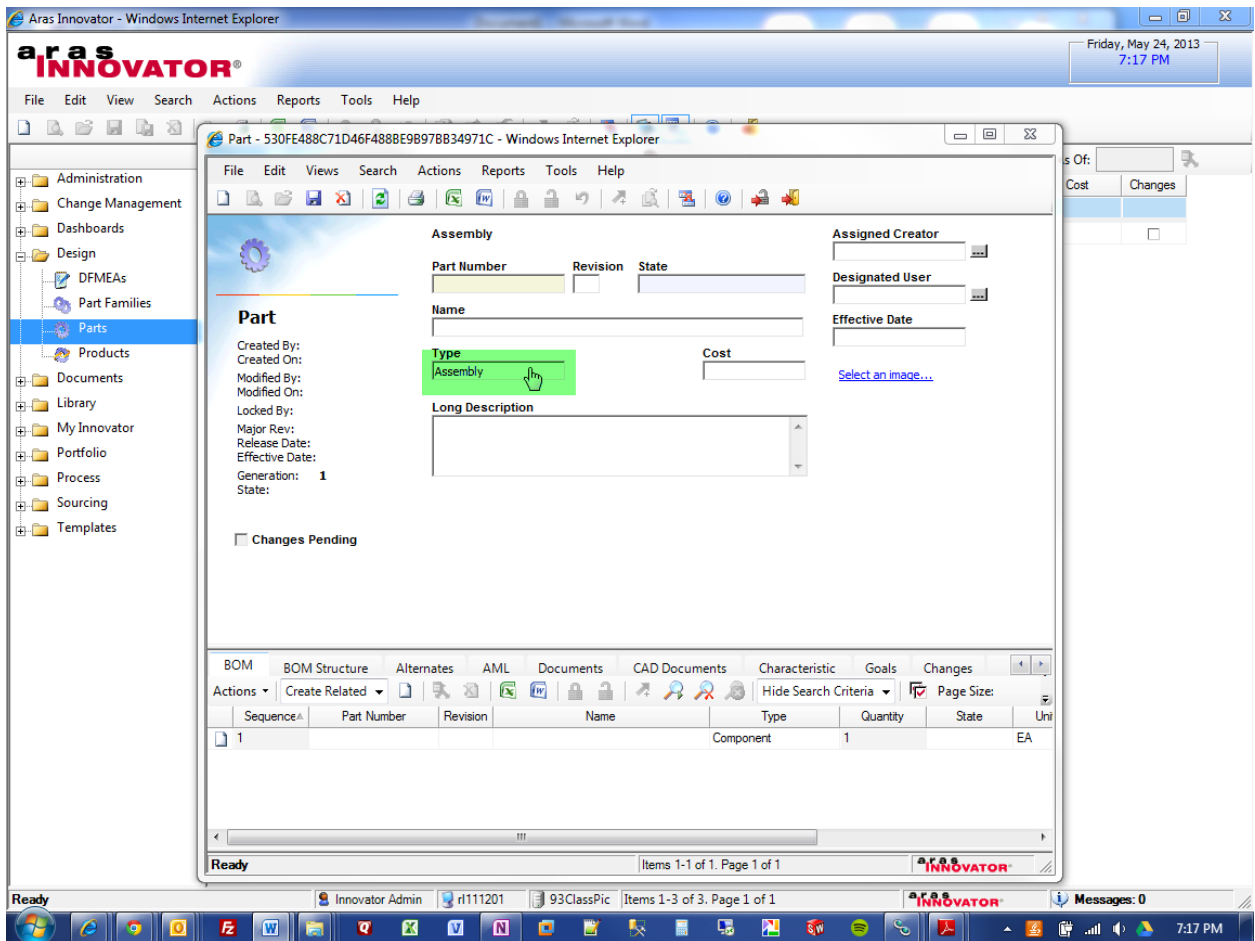


4. The BOM part is added with the appropriate class



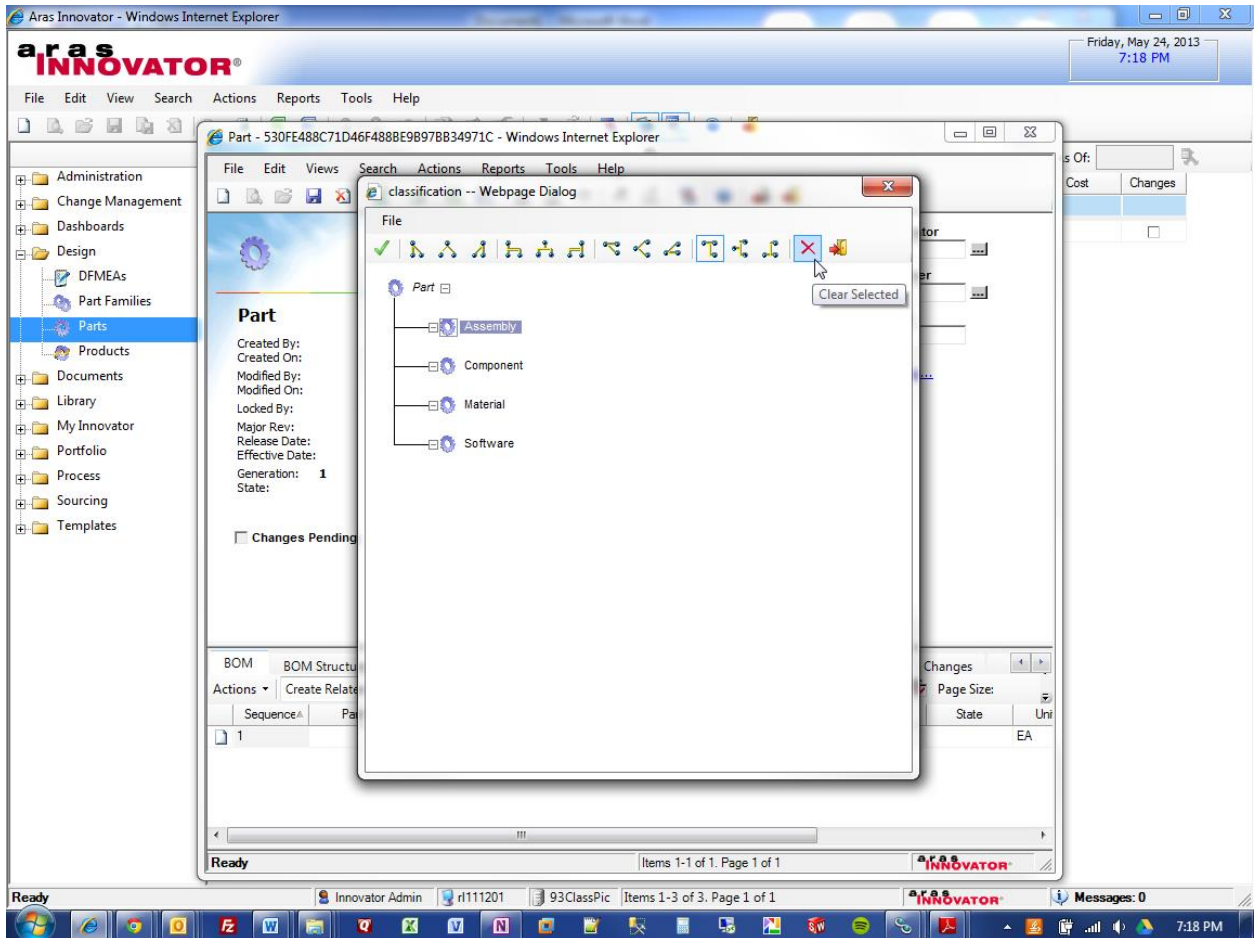
## Usage 3 – Clear the Classification

1. Select the Type property of the Part to display the class picker.

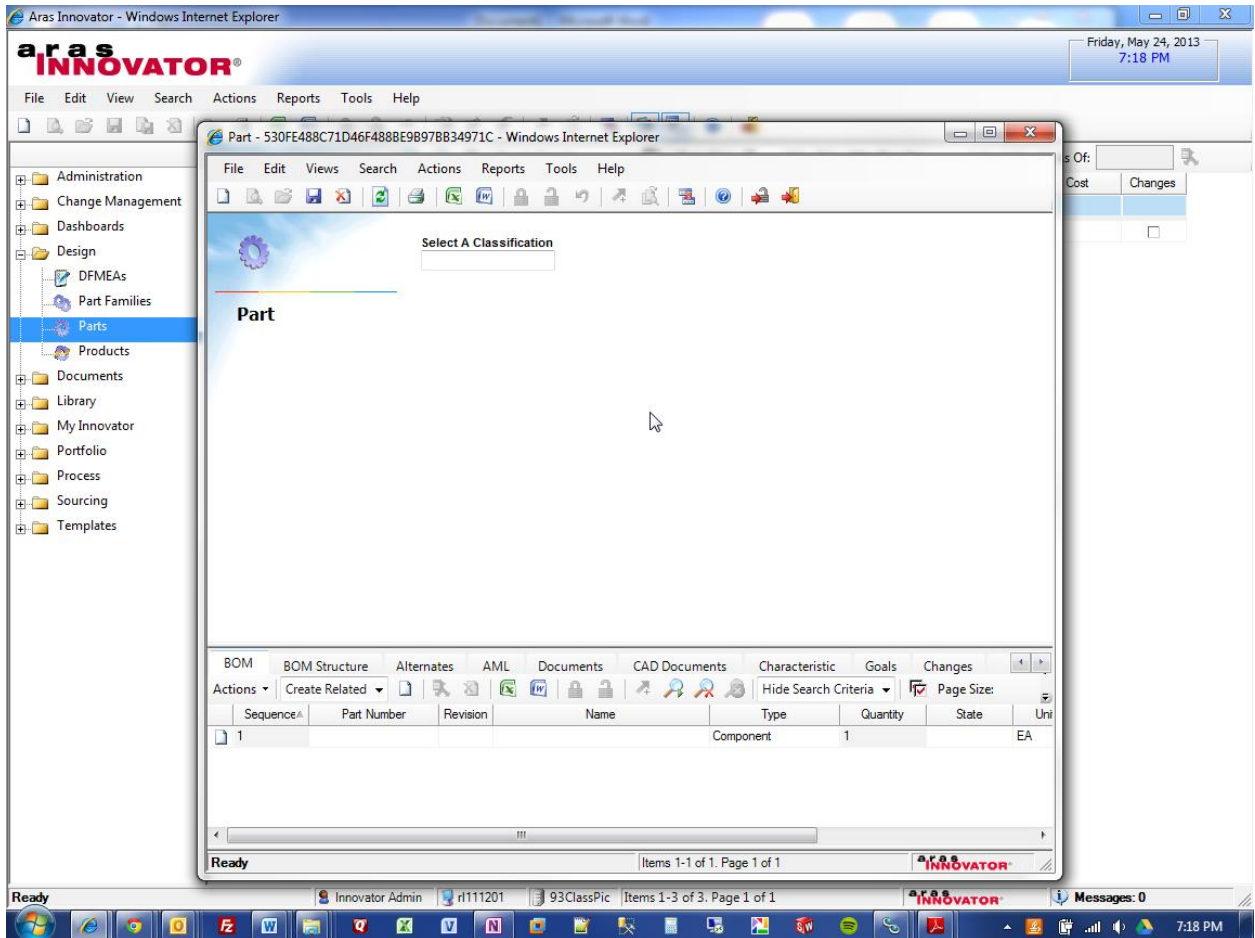




2. Select the Red X toolbar icon to clear the classification value



3. Be presented with form that shows the classification property only.



4. Save the Part to receive the error that the Type is required

