



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.

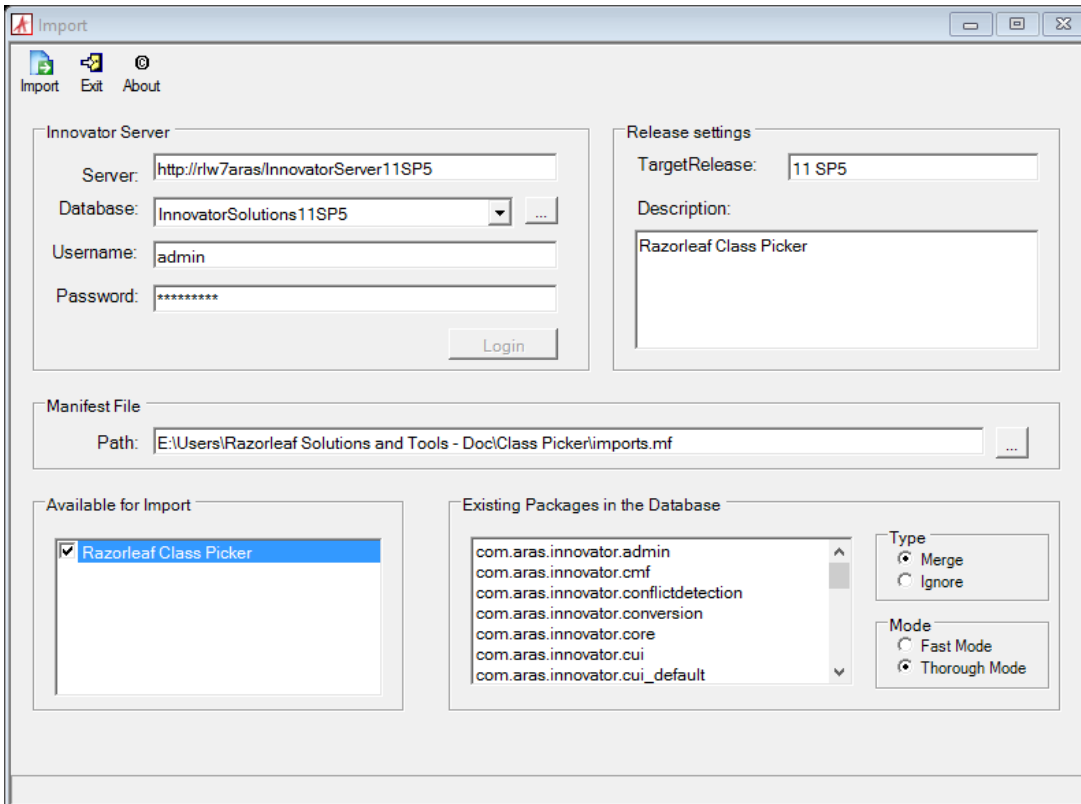
The Razorleaf Class Picker solution for Aras Innovator is designed to prompt the user to select the class prior to the item's form ever being displayed. This approach saves the user a few clicks and has a much more natural feeling when adding items. The solution uses the standard Innovator interface 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. If you have questions, contact us here <http://www.razorleaf.com/contact/>.

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:



The screenshot shows the 'Import' dialog box with the following configuration:

- Innovator Server:**
 - Server: `http://rlw7aras/InnovatorServer11SP5`
 - Database: `InnovatorSolutions11SP5`
 - Username: `admin`
 - Password: `*****`
 - Login button
- Release settings:**
 - TargetRelease: `11 SP5`
 - Description: `Razorleaf Class Picker`
- Manifest File:**
 - Path: `E:\Users\Razorleaf Solutions and Tools - Doc\Class Picker\imports.mf`
- Available for Import:**
 - ☒ `Razorleaf Class Picker`
- Existing Packages in the Database:**
 - `com.aras.innovator.admin`
 - `com.aras.innovator.cmf`
 - `com.aras.innovator.conflictdetection`
 - `com.aras.innovator.conversion`
 - `com.aras.innovator.core`
 - `com.aras.innovator.cui`
 - `com.aras.innovator.cui_default`
- Type:**
 - ☒ Merge
 - ☐ Ignore
- Mode:**
 - ☐ Fast Mode
 - ☒ Thorough Mode

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

The screenshot shows the Aras Innovator Class Picker interface in Mozilla Firefox. The browser address bar displays "http://rlw7aras - Form - RL Classification Only - Part (read only) - Mozilla Firefox". The application has a menu bar (File, Edit, Views, Search, Actions, Reports, Tools, Help) and a toolbar. On the left, a tree view shows a hierarchy: "RL Classification Only..." (expanded), "item_info", and "text1". The main area is divided into tabs: "Field Type", "Field Label", "Field Physical", "Field Border", "Field CSS", "Field Event", "Form Properties" (selected), "Form Body", and "Form Event". The "Form Properties" tab displays the following fields:

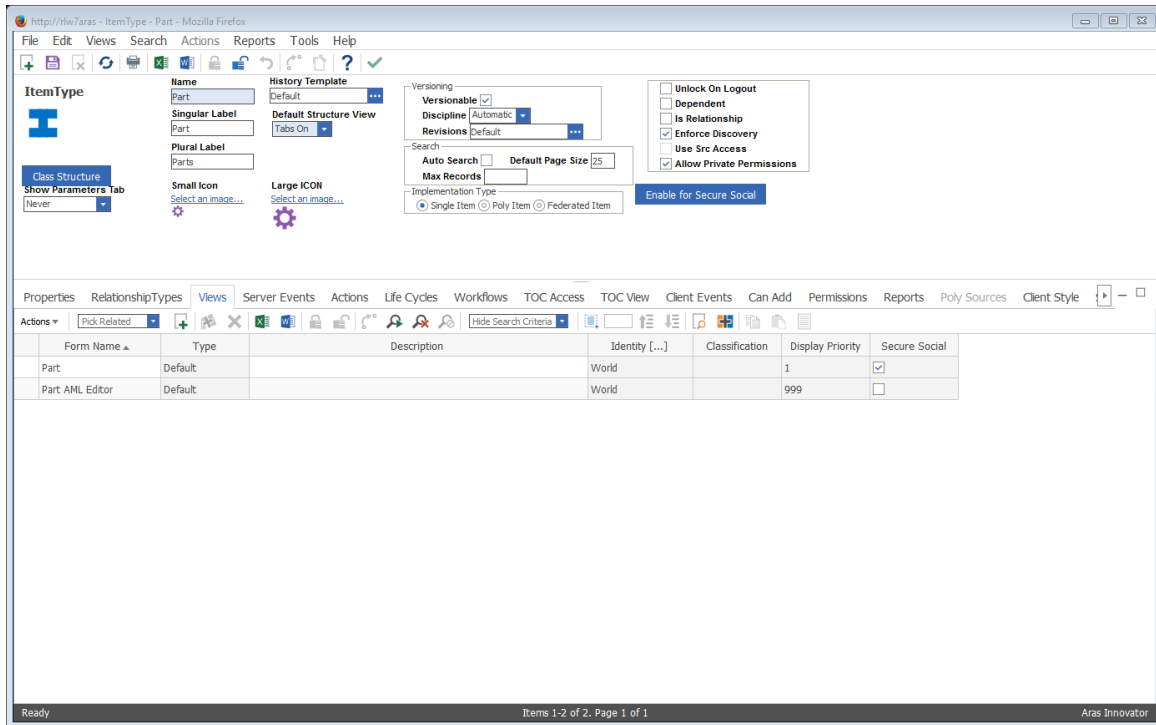
Property	Value
Name	RL Classification Only - Part
Description	Razorleaf Class Picker - Class only R
Category Form	<input type="checkbox"/>
Identity	
Width	699
Height	350
Stylesheet	../styles/default.css

Below the properties, there is a section titled "Select A Classification" with a dropdown menu.

At the bottom of the window, the status bar shows "Ready" on the left and "Aras Innovator" on the right.

6. Save, unlock, and close the form
7. Edit the Part ItemType
8. Select the Views tab

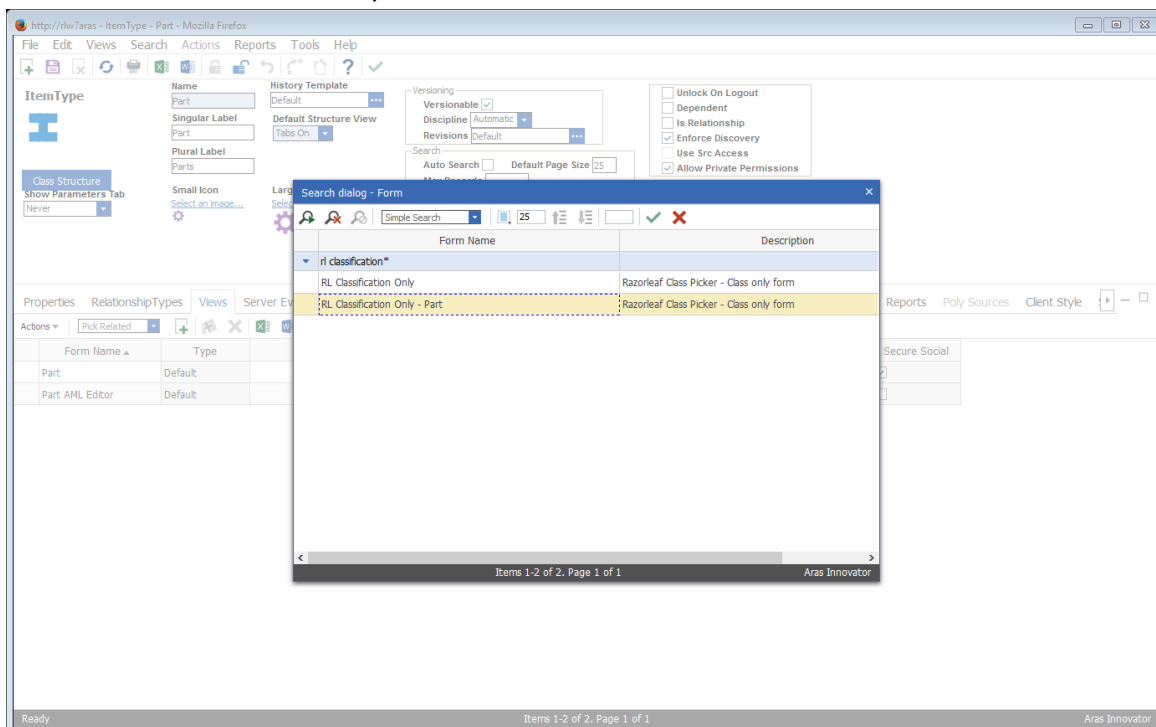
9. Select Pick Related from the dropdown and select the New Relationship toolbar button



The screenshot shows the 'Item Type' configuration page for 'Part' in the Aras Innovator web application. The 'Actions' dropdown is set to 'Pick Related'. The 'New Relationship' toolbar button is highlighted. The 'Properties' tab is active, showing various configuration options for the 'Part' item type.

Form Name	Type	Description	Identity [...]	Classification	Display Priority	Secure Social
Part	Default		World		1	<input checked="" type="checkbox"/>
Part AML Editor	Default		World		999	<input type="checkbox"/>

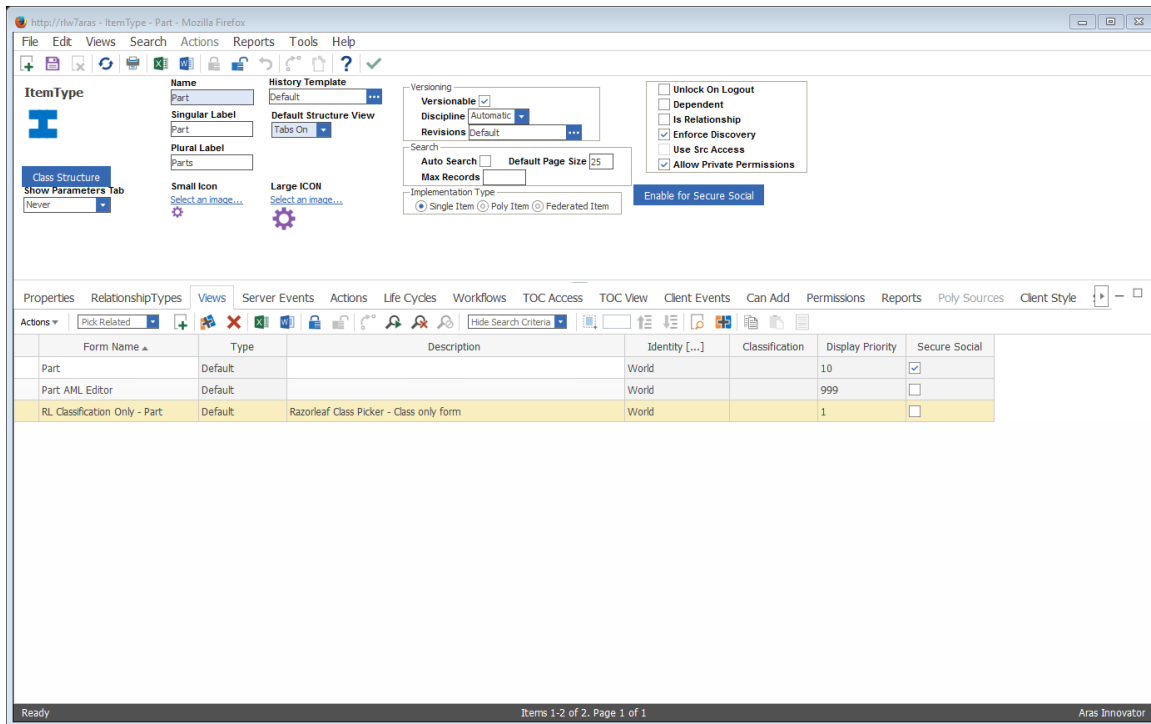
10. Select the RL Classification Only – Part form and the Return Selected button



The screenshot shows the 'Item Type' configuration page for 'Part' in the Aras Innovator web application. A 'Search dialog - Form' is open, displaying a list of forms. The 'RL Classification Only - Part' form is selected. The 'Return Selected' button is highlighted.

Form Name	Description
RL Classification Only	Razorleaf Class Picker - Class only form
RL Classification Only - Part	Razorleaf Class Picker - Class only form

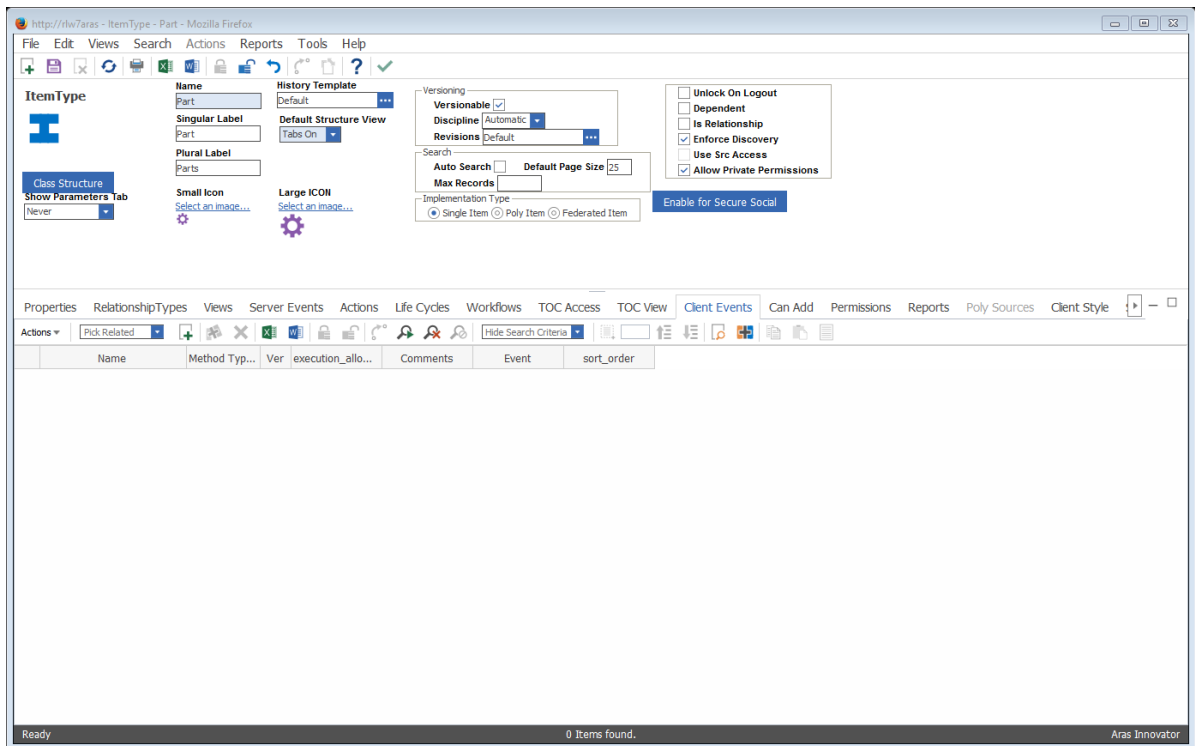
11. Set the Type to Default. Leave the classification value blank. Set the Display Priority to 1. Typically, there should only be one form with a display priority of 1. If there are other forms with a priority of one, then adjust their priority or remove the row from the Views tab. This will enable the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



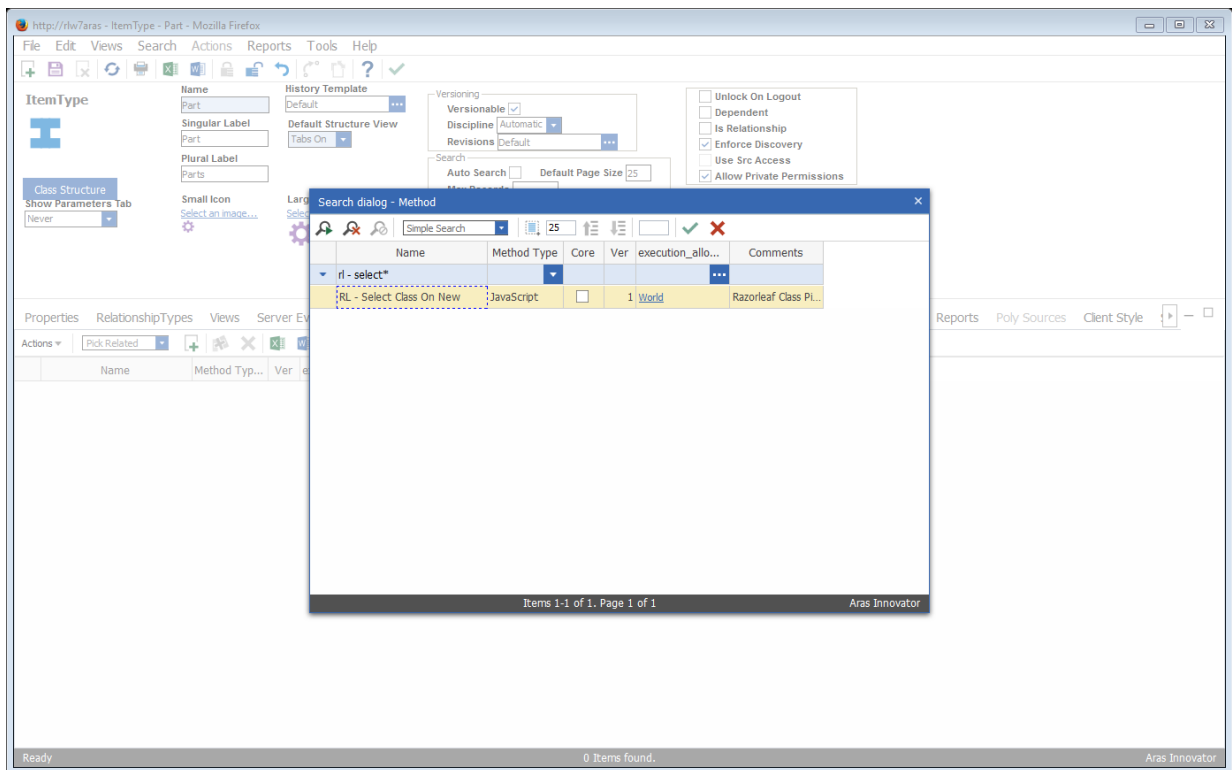
The screenshot shows the Aras Innovator 'Class Picker' interface. The 'Views' tab is active, displaying a table of forms. The table has columns for Form Name, Type, Description, Identity, Classification, Display Priority, and Secure Social. The 'RL Classification Only - Part' form is highlighted in yellow, showing a Display Priority of 1.

Form Name	Type	Description	Identity	Classification	Display Priority	Secure Social
Part	Default		World		10	<input checked="" type="checkbox"/>
Part AML Editor	Default		World		999	<input type="checkbox"/>
RL Classification Only - Part	Default	Razorleaf Class Picker - Class only form	World		1	<input type="checkbox"/>

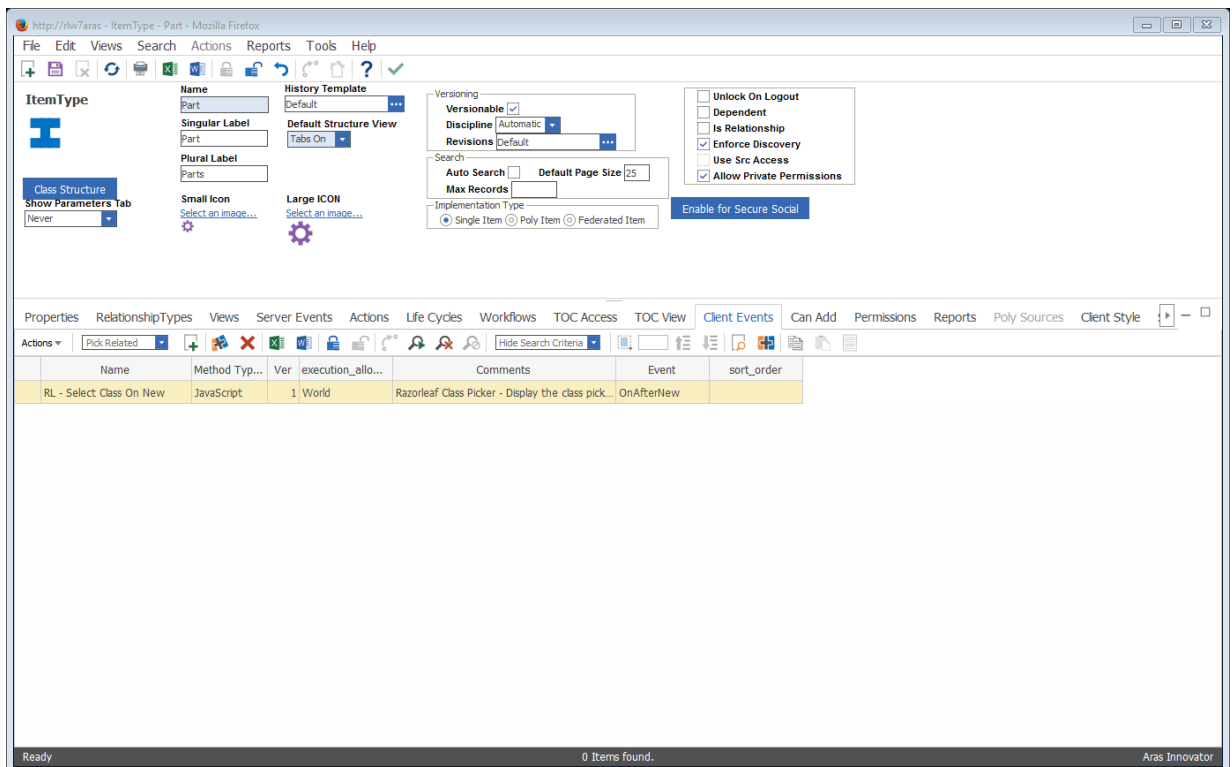
12. Select the Client Events tab of the Part ItemType. Select Pick Related from the toolbar and the New Relationship button



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

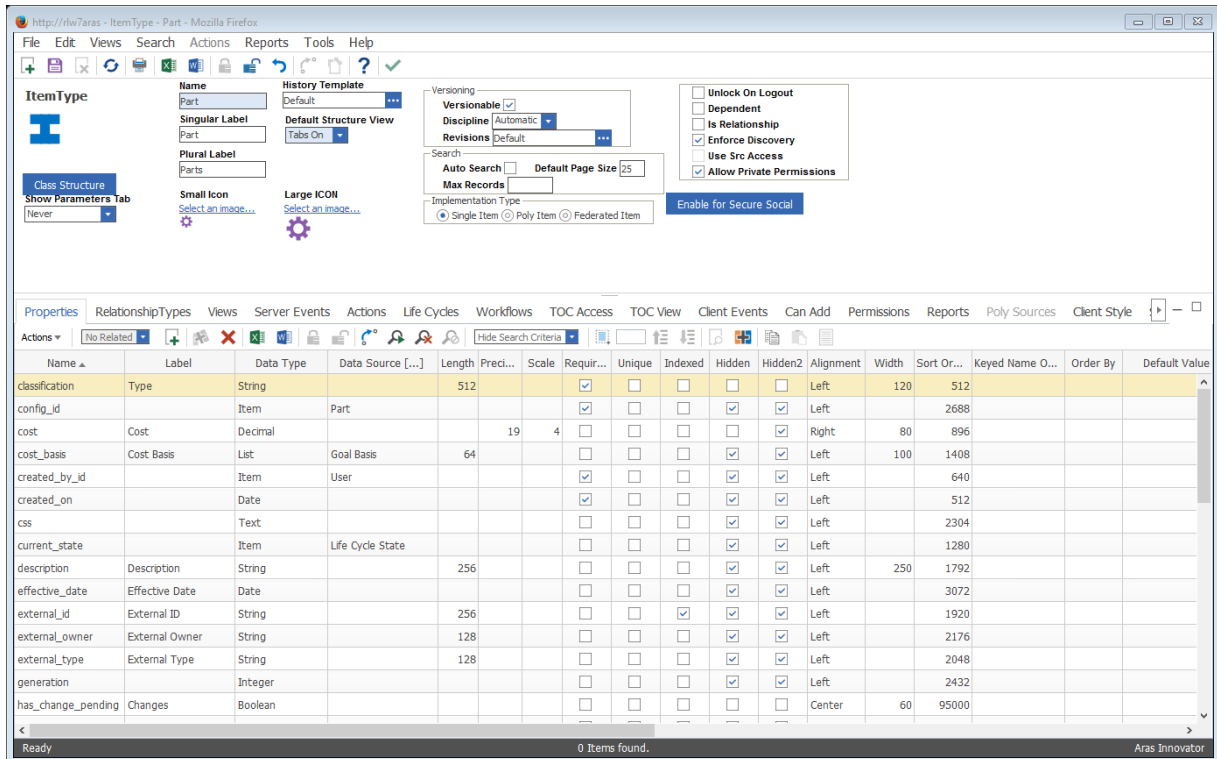


14. Set the Event to OnAfterNew



6/8/2016

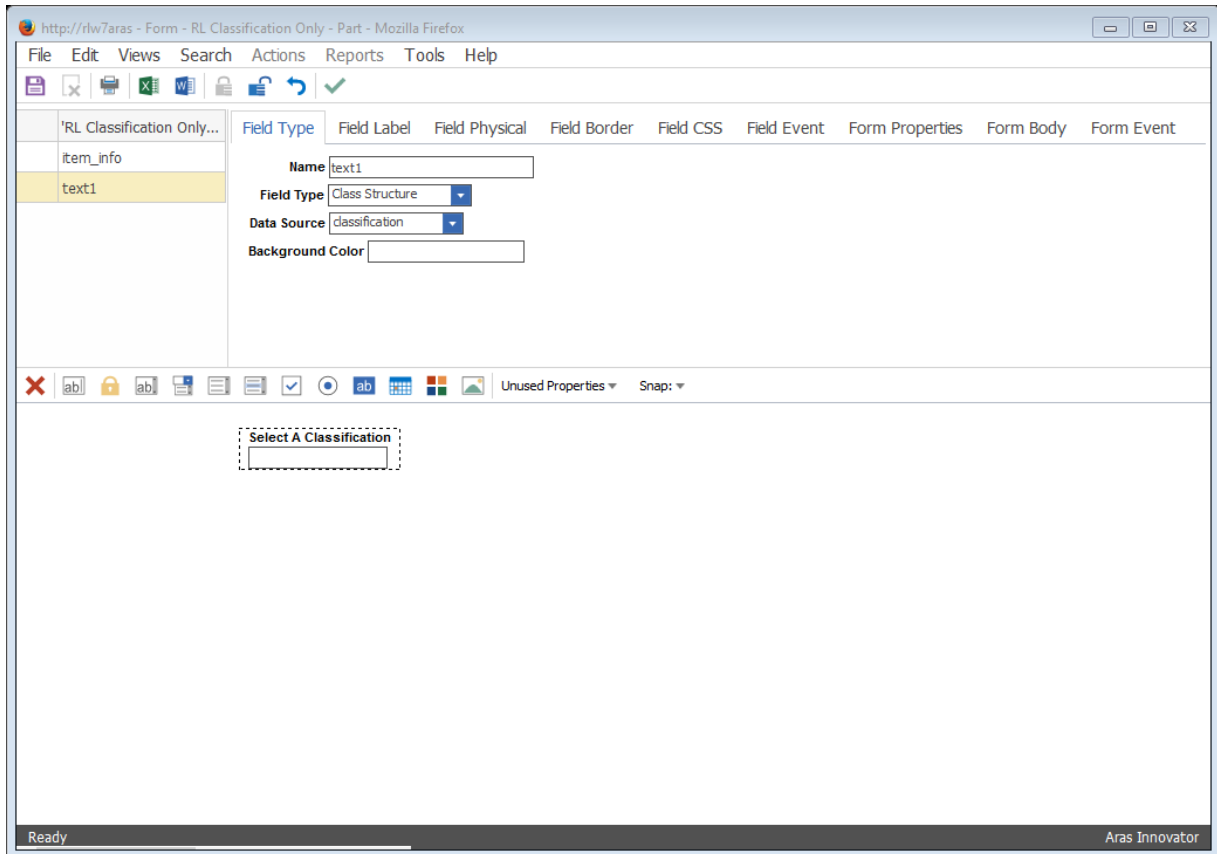
15. While not required, it is probably desirable to make the classification property a required property. Any Parts that exist without a classification will need to be remediated before enforcing that classification is required.



Name	Label	Data Type	Data Source	Length	Preci...	Scale	Requir...	Unique	Indexed	Hidden	Hidden2	Alignment	Width	Sort Or...	Keyed Name O...	Order By	Default Value
classification	Type	String		512			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Left	120	512			
config_id		Item	Part				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Left		2688			
cost	Cost	Decimal			19	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Right	80	896			
cost_basis	Cost Basis	List	Goal Basis	64			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Left	100	1408			
created_by_id		Item	User				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Left		640			
created_on		Date					<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Left		512			
css		Text					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Left		2304			
current_state		Item	Life Cycle State				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Left		1280			
description	Description	String		256			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Left	250	1792			
effective_date	Effective Date	Date					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Left		3072			
external_id	External ID	String		256			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Left		1920			
external_owner	External Owner	String		128			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Left		2176			
external_type	External Type	String		128			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Left		2048			
generation		Integer					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Left		2432			
has_change_pending	Changes	Boolean					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Center	60	95000			

16. Save, Unlock, and Close the Part ItemType.
17. Edit the form RL Classification Only – Part

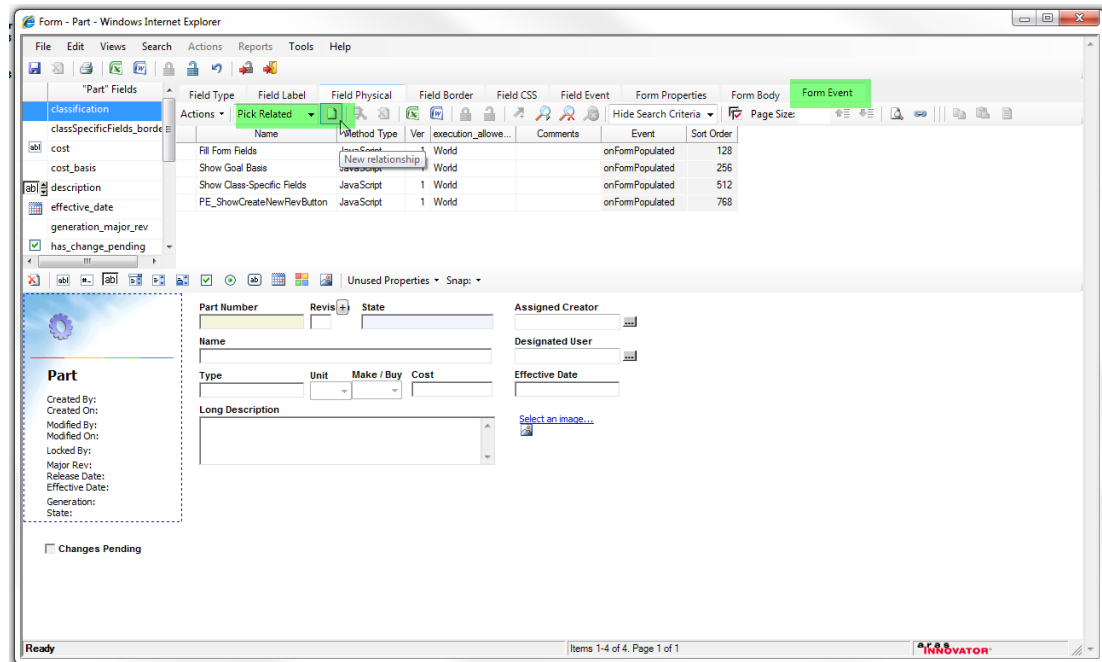
18. Select the Select A Classification property and set the Data Source property to classification.



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

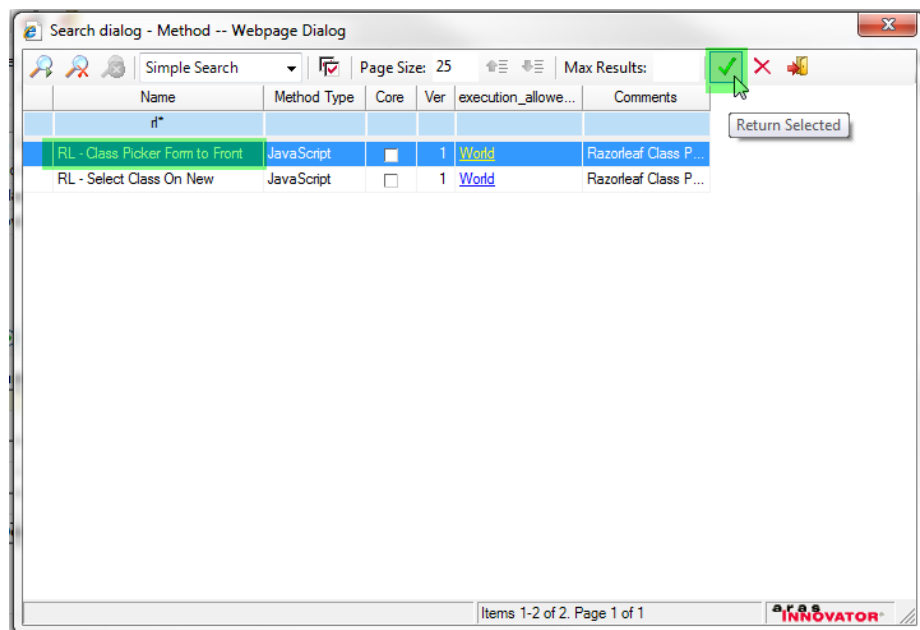
20. For each class specific form associated with the Part ItemType, follow the below steps

- Edit the form
- Select the Form Event tab
- Select Pick Related from the dropdown and the Add New Relationship button from the toolbar



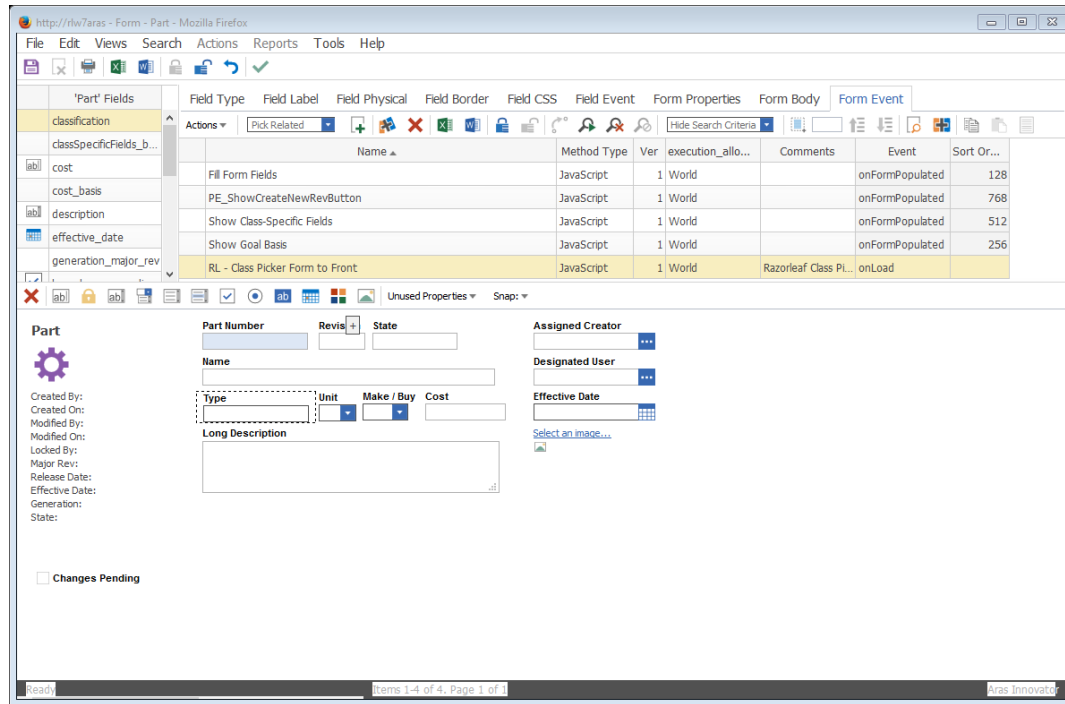
Name	Method Type	Ver	execution_allow...	Comments	Event	Sort Order
Fill Form Fields	JavaScript	1	World		onFormPopulated	128
Show Goal Basis	JavaScript	1	World		onFormPopulated	256
Show Class-Specific Fields	JavaScript	1	World		onFormPopulated	512
FE_ShowCreateNewRevButton	JavaScript	1	World		onFormPopulated	768

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



Name	Method Type	Core	Ver	execution_allow...	Comments
ri*					
RL - Class Picker Form to Front	JavaScript		1	World	Razorleaf Class P...
RL - Select Class On New	JavaScript		1	World	Razorleaf Class P...

e. Set the event to onLoad



Name	Method Type	Ver	execution_allo...	Comments	Event	Sort Or...
Fill Form Fields	JavaScript	1	World		onFormPopulated	128
PE_ShowCreateNewRevButton	JavaScript	1	World		onFormPopulated	768
Show Class-Specific Fields	JavaScript	1	World		onFormPopulated	512
Show Goal Basis	JavaScript	1	World		onFormPopulated	256
RL - Class Picker Form to Front	JavaScript	1	World	Razorleaf Class Pl...	onLoad	

Part

Part Number: [] Revis: [] State: []

Name: []

Type: [] Unit: [] Make / Buy: [] Cost: []

Long Description: []

Assigned Creator: []

Designated User: []

Effective Date: []

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

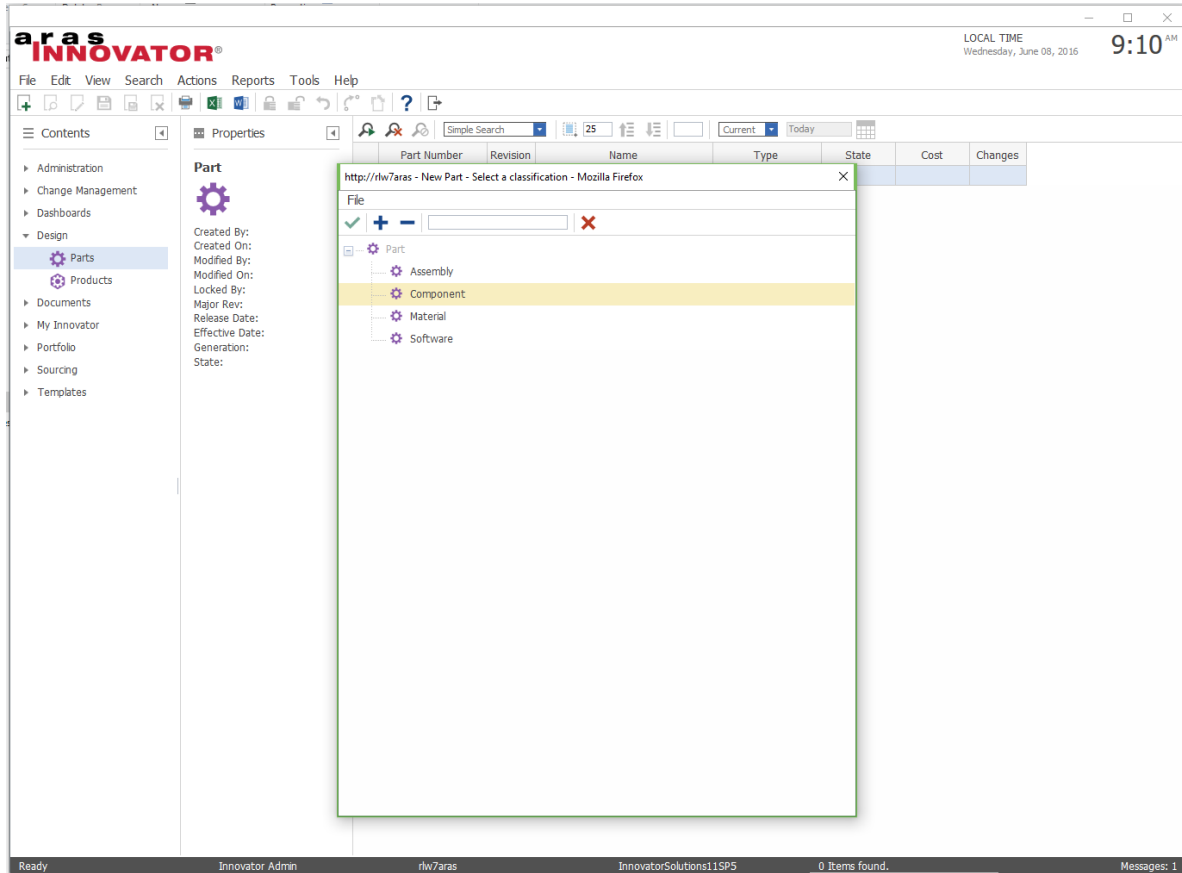
☐ Changes Pending

f. Save, Unlock, and Close the Form

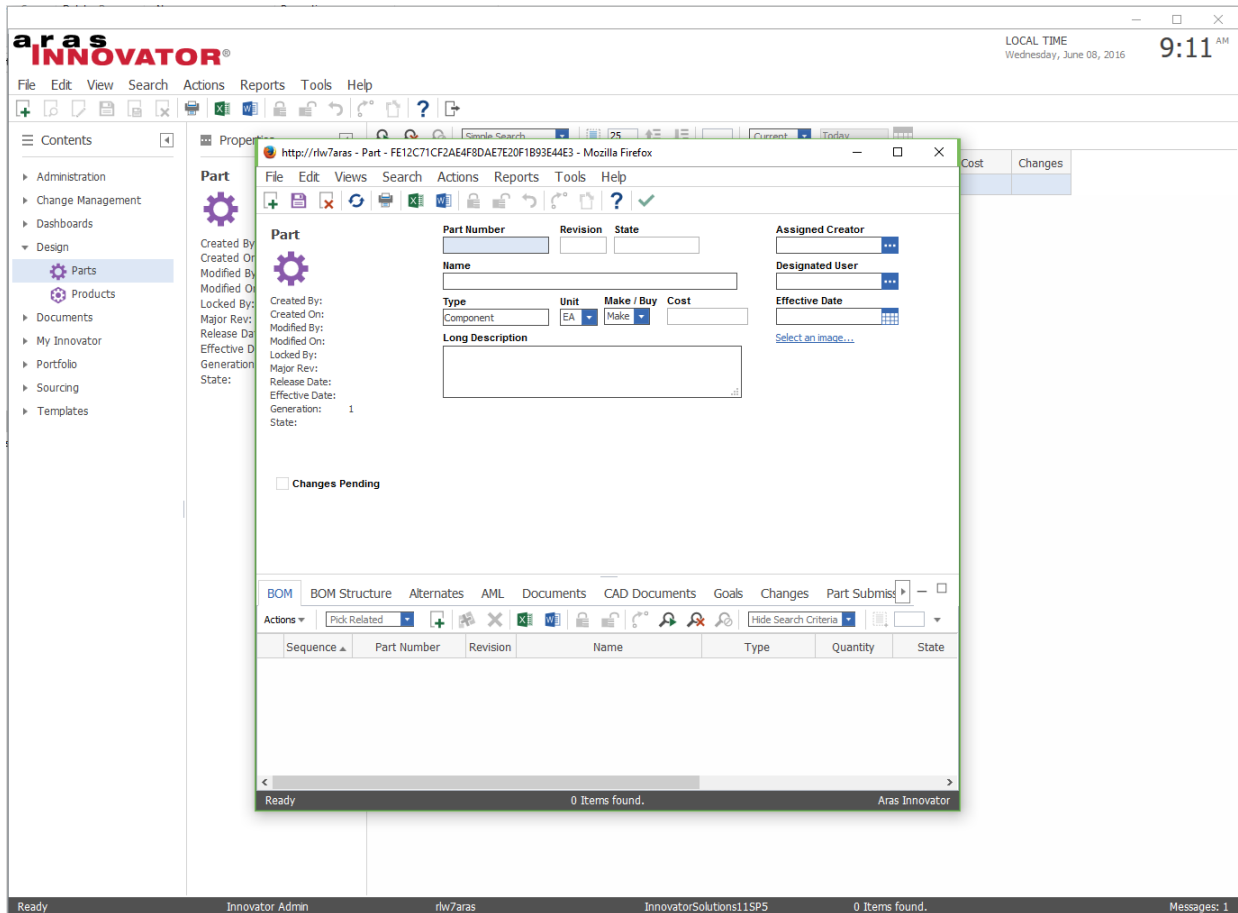
g. Repeat for each class specific form

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



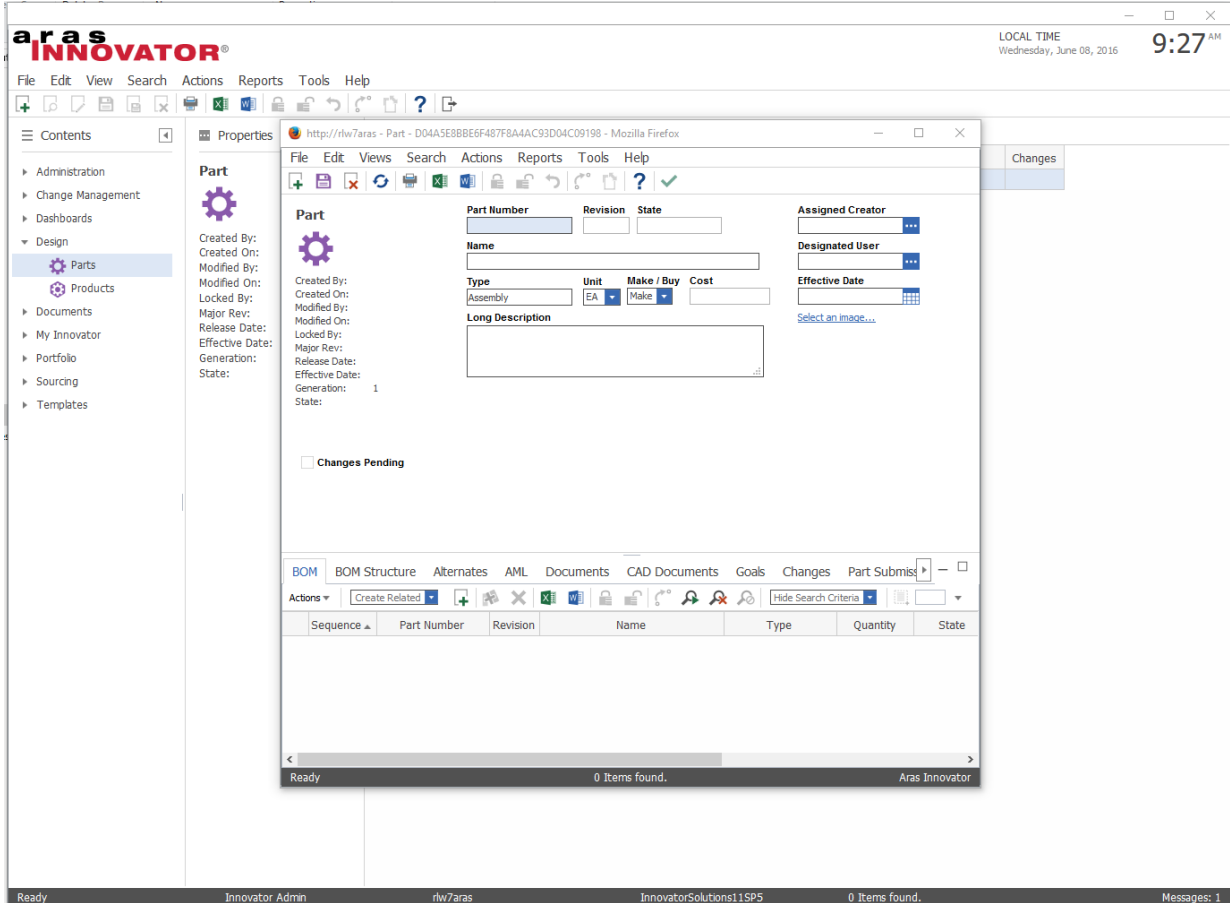
The screenshot displays the Aras Innovator web application interface. The main window shows the 'Part' form, which is a classification-specific form for creating or editing a part. The form includes the following fields:

- Part Number:** A text input field.
- Revision:** A text input field.
- State:** A text input field.
- Name:** A text input field.
- Type:** A dropdown menu with 'Component' selected.
- Unit:** A dropdown menu with 'EA' selected.
- Make / Buy:** A dropdown menu with 'Make' selected.
- Cost:** A text input field.
- Long Description:** A large text area.
- Assigned Creator:** A dropdown menu with a search icon.
- Designated User:** A dropdown menu with a search icon.
- Effective Date:** A date picker.

The form also includes a 'Changes Pending' checkbox and a 'Part Submission' button. The background window shows the 'BOM' (Bill of Materials) structure, which is a hierarchical view of the part's components. The BOM structure is displayed in a table with columns for Sequence, Part Number, Revision, Name, Type, Quantity, and State. The table is currently empty, and a message at the bottom indicates '0 Items found.'

Usage 2 – Add New BOM Item

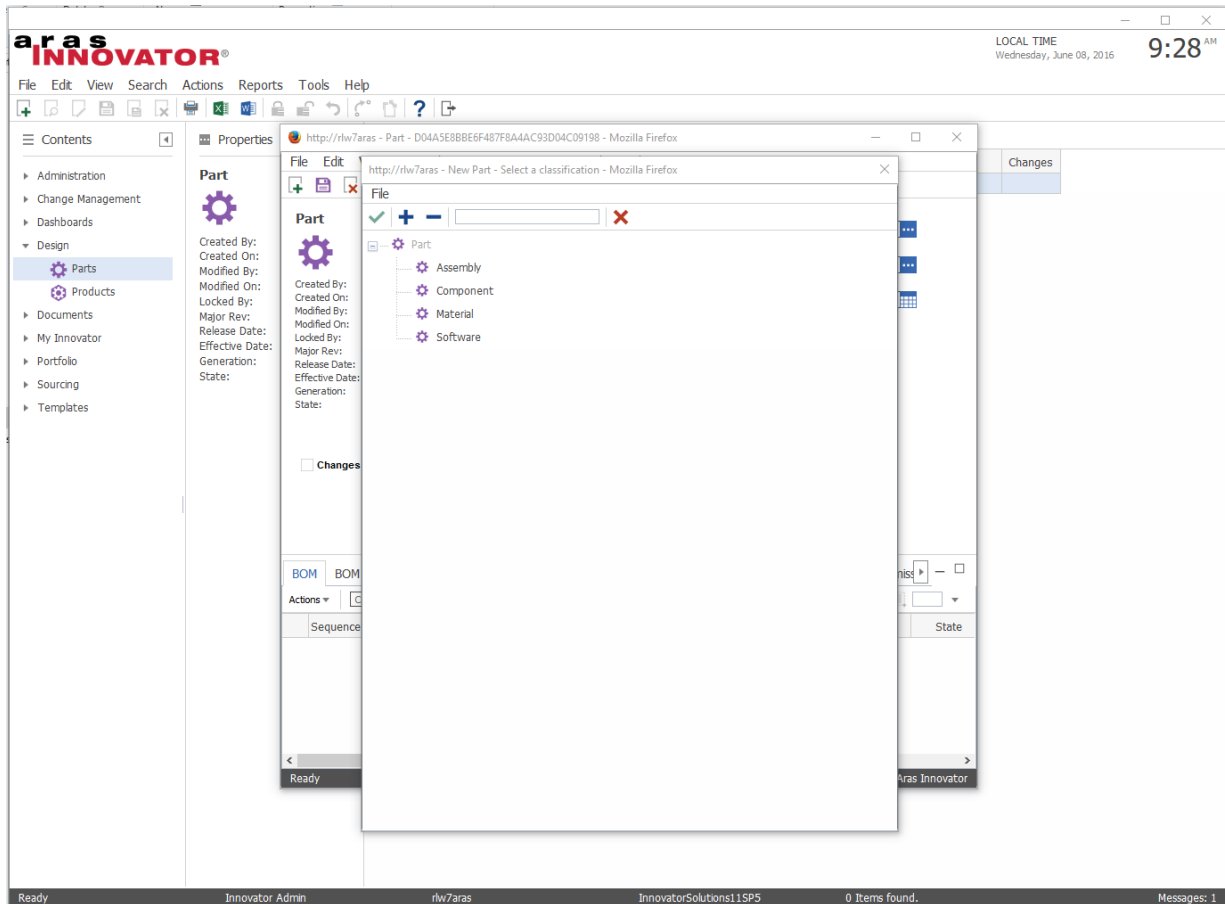
1. Select the BOM tab of the Part
2. Select Create Related from the dropdown and select the Create New Relationship button



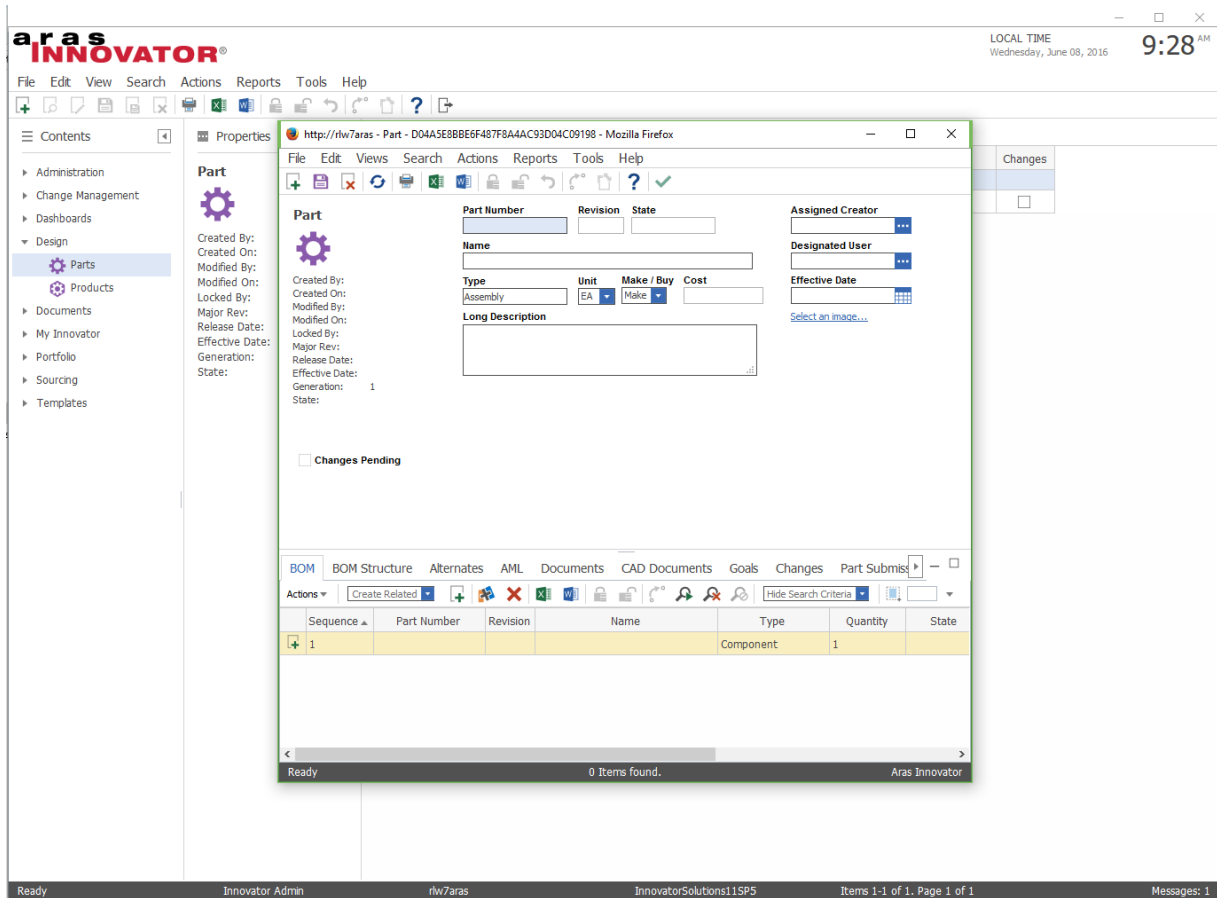
The screenshot displays the Aras Innovator web application interface. The main window shows the 'Part' form with the 'BOM' tab selected. The 'Actions' menu is open, and the 'Create Related' button is highlighted. The 'Part' form includes fields for Part Number, Revision, State, Name, Type, Unit, Make / Buy, Cost, and Long Description. The 'Assigned Creator' and 'Designated User' fields are also visible. The 'Changes' tab is active on the right side of the form. The bottom status bar shows 'Ready', 'Innovator Admin', 'rlw7aras', 'InnovatorSolutions11SP5', '0 Items found.', and 'Messages: 1'.



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



4. The BOM part is added with the appropriate class



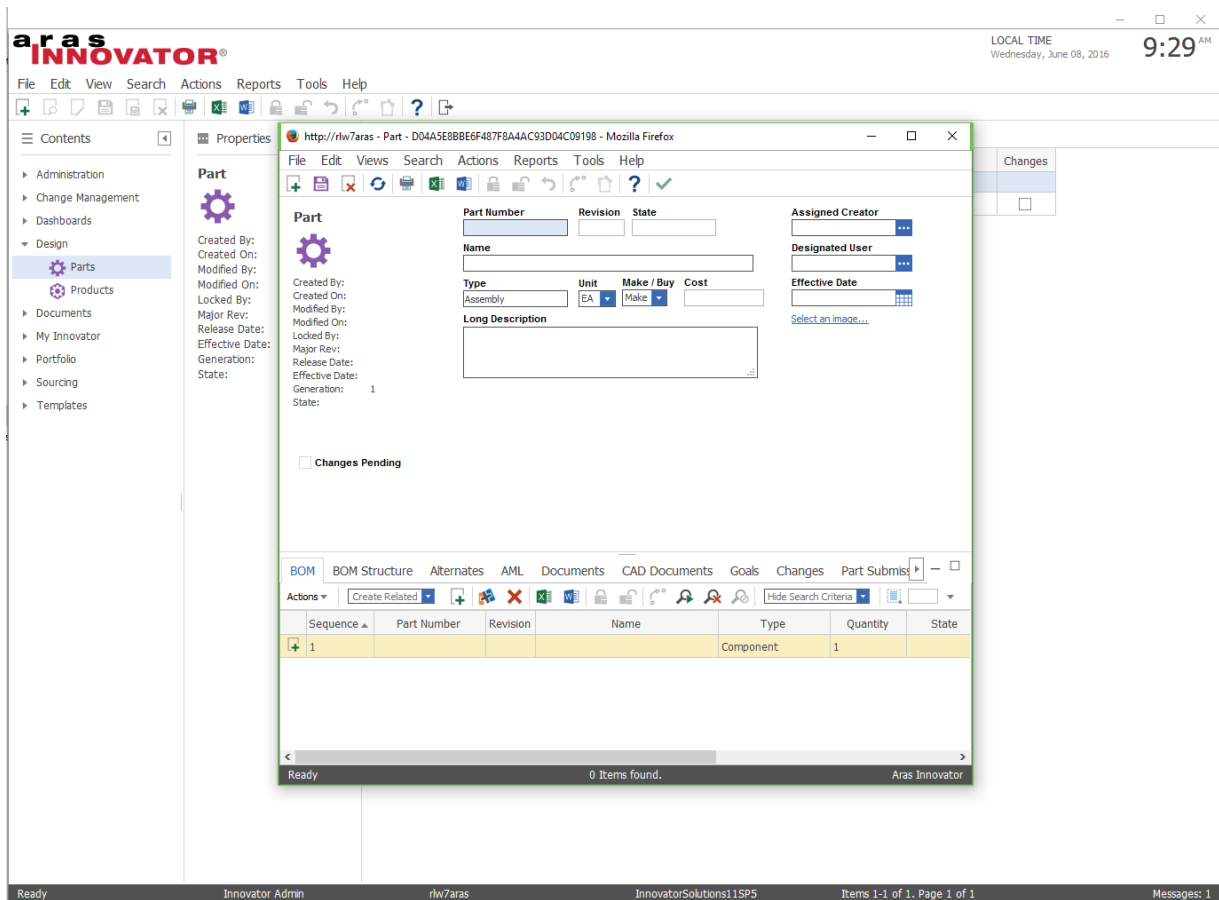
The screenshot displays the Aras Innovator web application interface. The main window shows the 'Part' form, which includes fields for Part Number, Revision, State, Name, Type, Unit, Make / Buy, Cost, and Long Description. The 'Part' form is currently in the 'BOM' tab, showing a table with one row representing a component.

Sequence	Part Number	Revision	Name	Type	Quantity	State
1				Component	1	

The bottom status bar indicates 'Ready', 'Innovator Admin', 'rhw7aras', 'InnovatorSolutions11SP5', 'Items 1-1 of 1. Page 1 of 1', and 'Messages: 1'.

Usage 3 – Clear the Classification

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



The screenshot shows the Aras Innovator web application interface. The main window displays the 'Part' form with various fields for metadata and classification. A class picker window is open, showing a list of items for selection. The 'Part' form includes fields for Part Number, Revision, State, Name, Type, Unit, Make / Buy, Cost, and Long Description. The class picker window shows a table with columns: Sequence, Part Number, Revision, Name, Type, Quantity, and State. The table contains one item with Sequence 1, Part Number, Revision, Name, Type Component, Quantity 1, and State.

Part Form Fields:

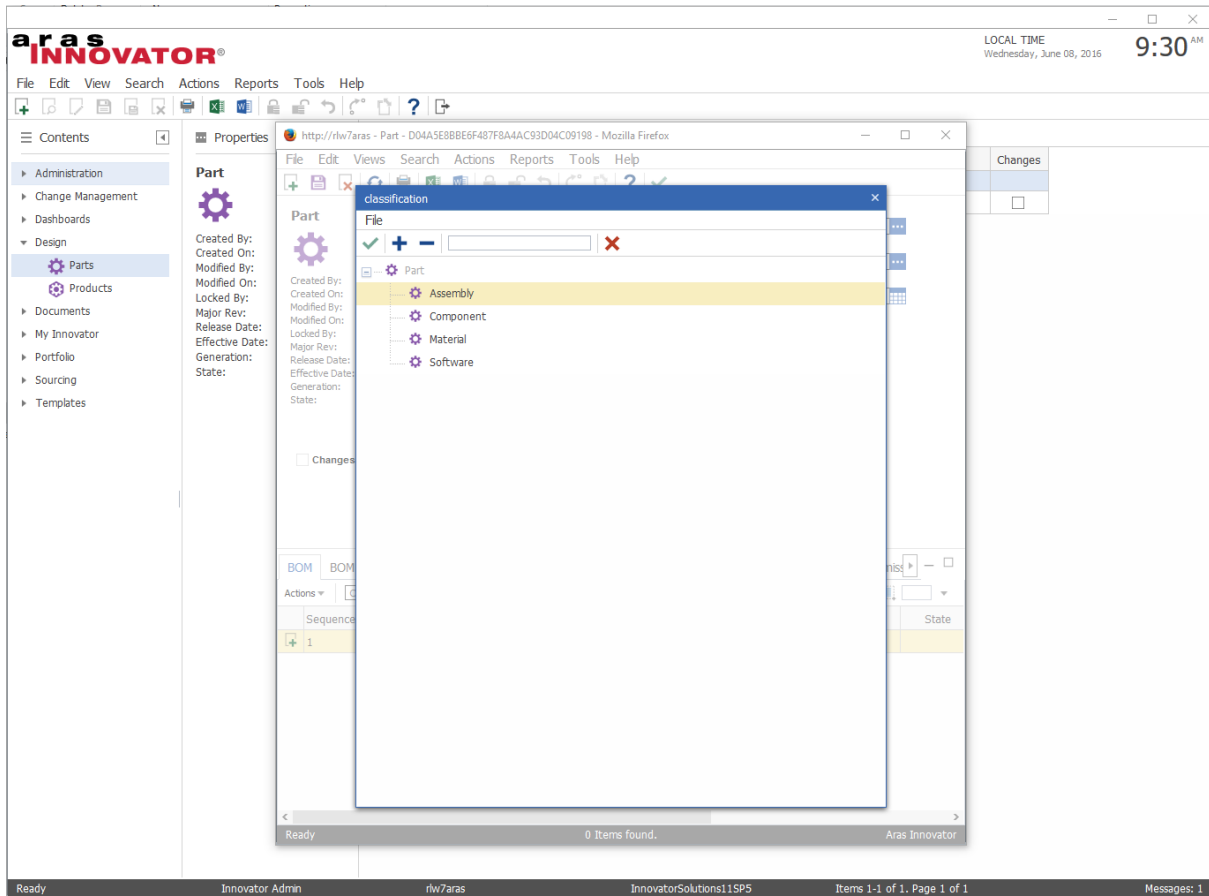
- Part Number: [Text Field]
- Revision: [Text Field]
- State: [Text Field]
- Name: [Text Field]
- Type: [Dropdown Menu]
- Unit: [Dropdown Menu]
- Make / Buy: [Dropdown Menu]
- Cost: [Text Field]
- Long Description: [Text Area]

Class Picker Window:

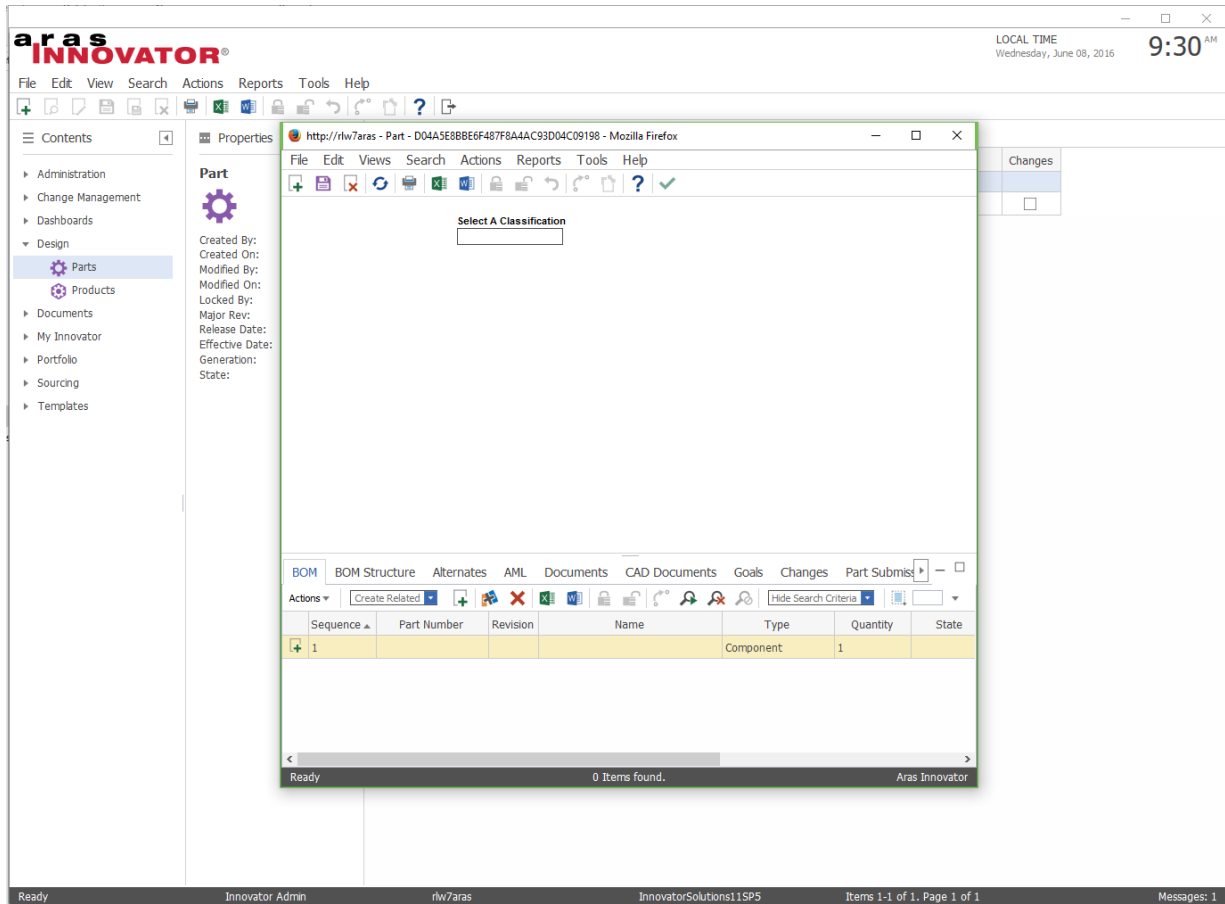
Sequence	Part Number	Revision	Name	Type	Quantity	State
1				Component	1	

0 Items found.

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



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

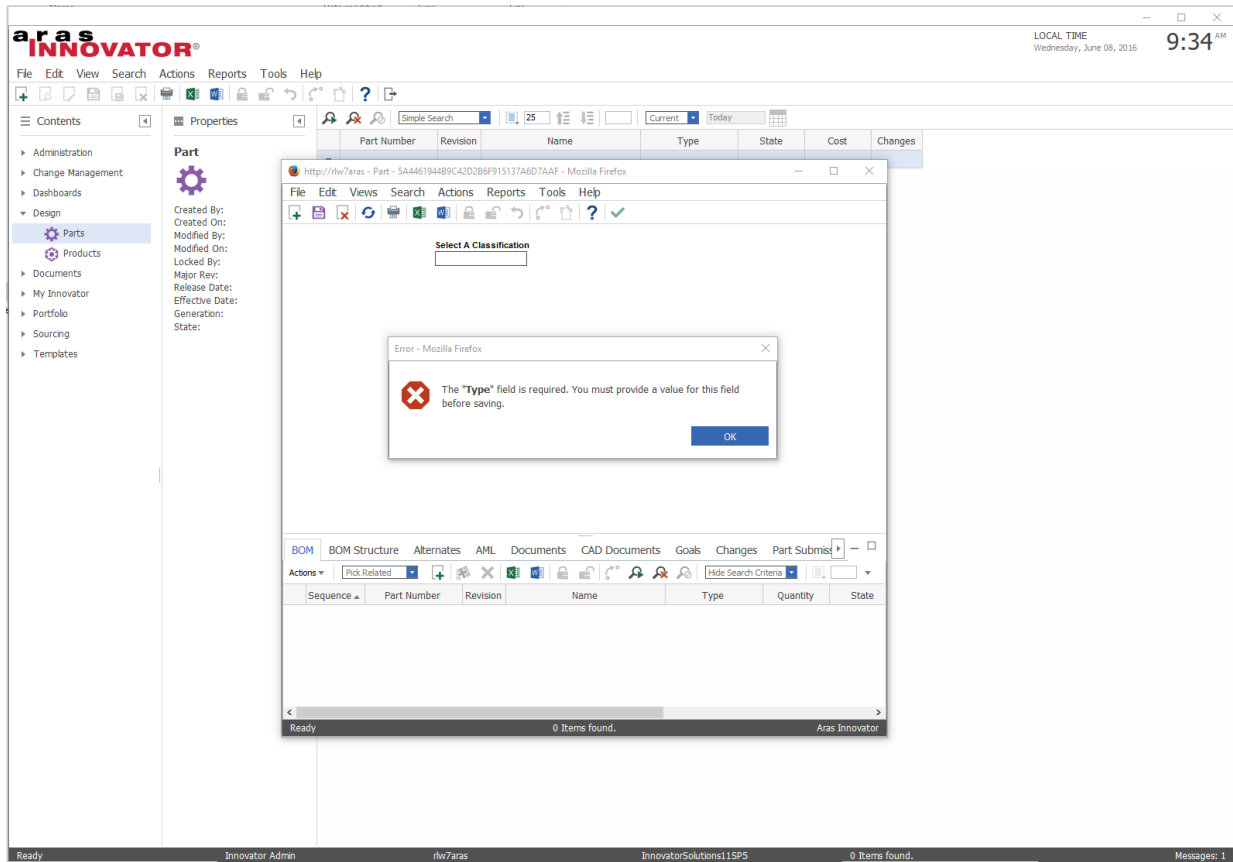


The screenshot displays the Aras Innovator web application interface. The main window shows the 'Part' form, which is currently displaying the 'Classification' property. The form is titled 'Select A Classification' and includes a search bar. The 'Part' form is also showing a table with the following data:

Sequence	Part Number	Revision	Name	Type	Quantity	State
1				Component	1	

The interface also shows a sidebar with navigation options, a top menu bar, and a status bar at the bottom.

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



The screenshot displays the Aras Innovator web application interface. On the left, a navigation pane shows the 'Design' section with 'Parts' selected. The main area shows the 'Part' properties form. An error dialog box is open in the center, stating: 'Error - Mozilla Firefox: The "Type" field is required. You must provide a value for this field before saving.' Below the error message, there is an 'OK' button. The background shows a table with columns: Sequence, Part Number, Revision, Name, Type, Quantity, and State. The status bar at the bottom indicates 'Ready' and '0 Items found.'