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Aras Community Solution Add-on:

24-Mar-2014

Collaboration Folders (aka Item Folders)

V3-0

User Guide

Access from Main Window TOC

The screenshot displays the Aras Innovator web application interface. The left sidebar shows the 'Contents' tree with 'Folders' highlighted. The main window shows a search filter applied to the 'Folders' view, with a red dashed box around the 'Top' and 'Is Templ...' columns. A red arrow points to the 'Top' column header with the text: 'Use search filter to hide template folders And show root level folers only'.

Administrators have access to folder Templates

All Employees have access to their folders (if in folder's team)

TOC-Access to folder and „can-add“ permissions can be changed, by Administrators to fit your organization

Folder Navigator

http://localhost/?isTearOff=true&noTabs=false&isNew=false&isEditMode=true&databaseName=ArasDemo - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Folder Name: Extruder retrofit Program - Folders
Description:
Status: Active
Assigned Owner: Demo User
Co-Owner Group:
Top: ☒
Attachments: ☐

Folder Navigator Sub Folders (this level) Current

If icon is „red“, Row item is Locked by other user !

File has „Shared“ flag set. Else files are visible to Owner of folders only

Folder/Number	Pos	Files..	Status	Re	Description	Team
- Extruder retrofit Program - Folders	-	-	Active	-	-	TM_Extruder
1000 - Project Planning / Management	-	-	Active	-	-	TM_F...
10100 - Communication / emails	-	-	Active	-	-	Demo User
Attachments:						
Memo 1234.txt	1	-	-	1	3/24/2014	-
10200 - Issue Tracking	-	-	Active	-	-	Demo User
2000 - Requirements	-	-	Active	-	-	Demo User
Attachments:						
Extruder Retrofit Ideas.pptx	1	-	-	1	4/13/2012	-
Controlled Items:						
DD-10200-2345	1	-	Preliminary	A	1	4/13/2012
3000 - Design Documentation	-	-	Active	-	-	Demo User

Grouping Rows. (No records in database)

Click on link to open the Document meta data

Gray background on rows indicate that either attachments or controlled items are on lower levels

Document has attached file. Click on the icon to open the file directly.

Drag n Drop to Folder row

View Folder
View Attached Files
Refresh this Folder
Lock
Unlock
Add Controlled Item to Folder (new)...
Add Controlled Item to Folder (pick)...
Add File to Folder...
Add Sub Folder...
Promote Folders to Active (down)
Promote Folders to Archived (down)

Row actions always present

More row actions when top item is locked by user

Row actions always present for top item owners

From Desktop or File Explorer drag local files to Folder or Attachments row.
DOES NOT WORK WITH ARAS-10, YET !

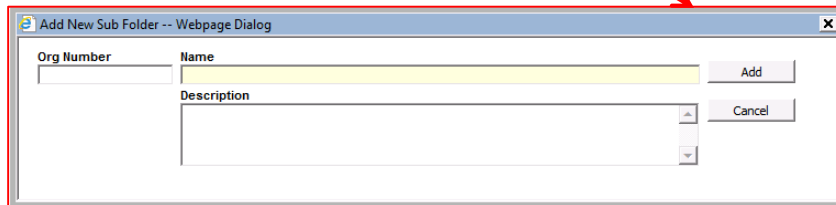
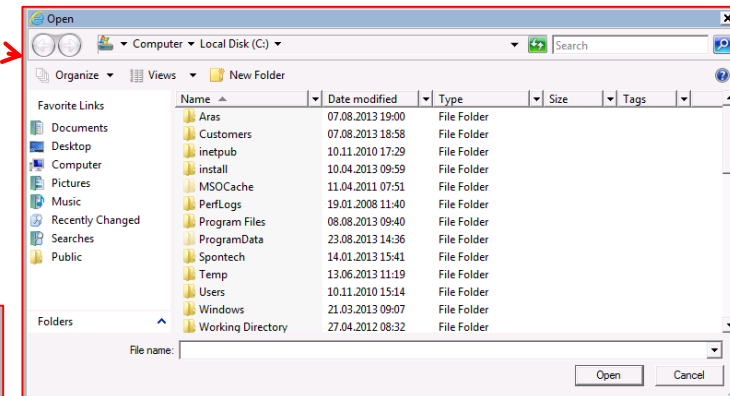
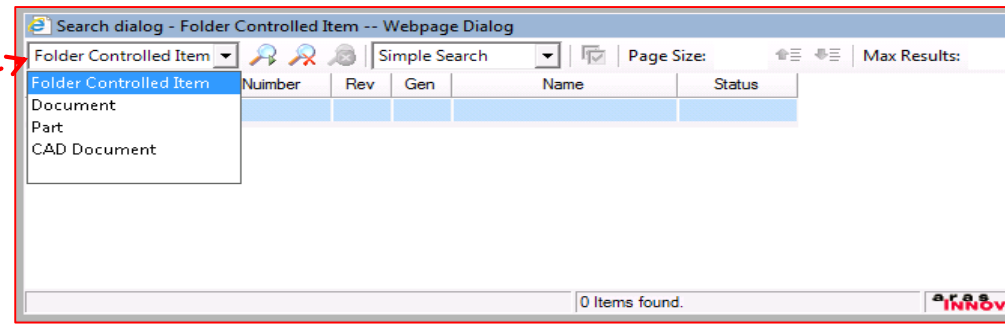
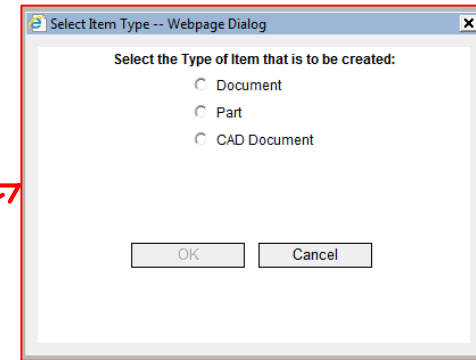
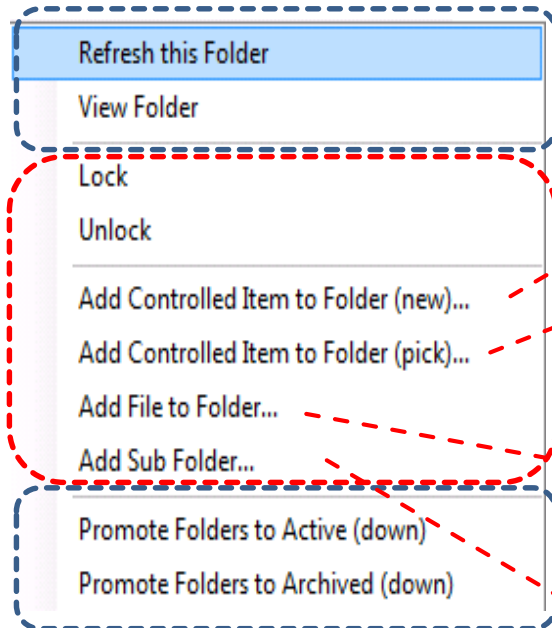
Memo2.txt

Folder Navigator – Context menu

Actions on Folder rows only.

Folder row must
be locked by you !

Folder in row must be unlocked !
Selected folder and all sub folders
are promoted!



Create new - Folder Templates

Aras INNOVATOR®

File Edit View Search Actions Reports Tools Help

Item Folder Template - Folders - Product Development Projects (read only) - Mozilla Firefox

File Edit Views Search Actions Reports Tools Help

Item Folder Template

State: Released Name: Folders - Product Development Projects

Description:

Template Top Folder: Program Folders - Product D

Folders Controlled Items Configuration

Folder/Number	Pos	Files...	Status	Rev	Gen	Date	Owner	Description
- Program Folders - Product Development Projects	-	-	Active	-	-	-	-	-
1000 - Project Management	-	-	Active	-	-	-	-	-
1100 - Controlled Items Configuration	-	-	-	-	-	-	-	-
1200 - Controlled Items Configuration	-	-	-	-	-	-	-	-
1300 - Issued	-	-	-	-	-	-	-	-

Controlled Items Configuration

Item Type Name	Auto Number Method
Document	Folder Template Default DocNum
Part	Folder Template Default PartNum
CAD	Folder Template Default CADNum

Code Editor:

```
01 Dim newItemNumber As String = Me.getInnovator().getNextSequence("Default Document")
02 Return Me.getInnovator().newResult(newItemNumber)
03
```

These Methods will be called when folder templates are copied to new folders. Any linked controlled items on folders will be created new with numbers generated from these methods. You may need to add your own methods or custom logic for your specific item numbering

Top Folder of Folder Template

The image displays the Aras Innovator interface for configuring a Folder Template. The left pane shows the 'Item Folder Template' configuration, and the right pane shows the 'Folder - Communications' configuration.

Folder Template Configuration (Left Pane):

- Name:** Folders - Product Development Project
- State:** Released
- Description:**
- Template Top Folder:** Program Folders - Product Development Project

Folder List (Table):

Folder/Number	Pos	Files...	Status
- Program Folders - Product Development Project	-	-	Active
1000 - Project Management	-	-	Active
1100 - Communications	-	-	Active
Attachments:			
Status Email Template...	128	-	-
Activity Report Template...	256	-	-
1200 - Contracts	-	-	Active
1300 - Issue Tracking	-	-	Active
2000 - Customer Requirements	-	-	Active
2100 - Data From Customer	-	-	Active
3000 - Product Design	-	-	Active
Controlled Items:			
Preliminary...	128	-	-

Folder - Communications Configuration (Right Pane):

- Name:** Communications
- Description:**
- Status:** Active
- Assigned Owner:** Innovator Admin
- Co-Owner Group:**
- Team Access:** Create New...
- Template:** ☒ Allow SubFolders
- Allowed Relationships:** Attachments And Controlled Items
- Attachments:** ☒ Attachments
- Ctrlid Items:** ☐ Ctrlid Items

Folder Navigator (Bottom):

- Folder/Number:** - Communications
- Pos:** -
- Files...** -
- Status:** Active
- Rev:** -
- Gen:** -
- Date:** -
- Owner:** Innovator Admin
- Description:**

Context Menu (Right Pane):

- View Folder
- View Attached Files
- Lock
- Unlock
- Add Controlled Item to Folder (new)...
- Add Controlled Item to Folder (pick)...
- Add File to Folder...
- Add Sub Folder...
- Promote Folders to Active (down)

Annotations:

- Top Folder gets the same name as the Folder Template:** Points to the 'Template Top Folder' field in the configuration.
- Use Context Menu to build structure of template folders:** Points to the context menu options for building the folder structure.

Attachments & Controlled Items on Template Folders

Folder - Program Folders - Product Development (read only) - Mozilla Firefox

File Edit Views Search Actions Reports Tools Help

Folder Name: Program Folders - Product Development
Description:
Status: Active
Assigned Owner: Innovator Admin
Co-Owner Group:
Team Access:
Template:
Allowed Relationships: Attachments And Controlled Items

Defines if more sub folders are allowed to be added to this folder

Defines what information is allowed to be connected to this folder

- Only Attachments
- Only Controlled Items
- Both

On any template folder these options can be defined

Attach any file to be copied when new folders are created from this template

Add any controlled items to be copied when new folders are created from this template. Attached files on Documents will get copied as well !

Folder/Number	Pos	Files...	Status	Rev	Gen	Date	Owner	Description
- Program Folders - Product Developm...	-	-	Active	-	-	-	Innovator Admin	
1000 - Project Management	-	-					Innovator Admin	
1100 - Communications	-	-					Innovator Admin	
Attachments:								
Status Email Template...	128		-	-	1	5/13/2013	-	
Activity Report Templ...	256		-	-	1	5/13/2013	-	
1200 - Contracts	-	-	Active	-	-	-		
1300 - Issue Tracking	-	-	Active	-	-	-		
2000 - Customer Requirements	-	-	Active	-	-	-		
2100 - Data From Customer	-	-	Active	-	-	-		
3000 - Product Design	-	-	Active	-	-	-		
Controlled Items:								
DTMPL-1000	128		Preliminary	A	1	5/13/2013		Template - Design Specs short
3100 - Design Specs	-	-	Active	-	-	-	Innovator Admin	
3200 - Design Results	-	-	Active	-	-	-	Innovator Admin	Engineering

Ready

Aras Innovator

Assigning Team Access to Folders

Folder

Name:

Description:

Related Project:

Status:

☒ Top

☐ Attachments

☐ Ctrl'd Items

Team Access

[FT_New Project \(IF00000017\)](#) *Click on link to open the Team*

[Create New...](#)

Folder Navigator

Sub Folders (this level) Folder Attachments Controlled Items

Folder/Number	Pos	File
- New Project	-	

Team - FT_New Project (IF00000017) (read only)

Name:

Description:

Can Update Team: [Innovator Admin](#)

Team Members

Name	Role [...]
Innovator Admin	

If no team is assigned to the folder and the folder is locked (edit mode), you can create a team for this folder

This is a „private“ team for this folder containing the folder's name and item_number

Lock the Team to add more members with roles „Manager, Member, Guest“.

The owner of the folder is automatically added as role „Team Manager“

Team Access is inherited down when changed

Team access is copied to sub folders that do not have a team assigned already (down the structure)

The image displays two screenshots of the Aras Innovator web interface, illustrating how team access is inherited by subfolders.

Left Screenshot (Folder Navigator):

Folder/Number	Pos	Files..	Status	Rev	Gen
- Extruder retrofit Program - Folders	-	-	Active	-	-
1000 - Project Planning / Managemer	-	-	Active	-	-
10100 - Communication / emails	-	-	Active	-	-
10200 - Issue Tracking	-	-	Active	-	-
2000 - Requirements	-	-	Active	-	-
Controlled Items:					
DD-10200-2345	1	-	Preliminary	A	1
3000 - Design Documentation	-	-	Active	-	-

Right Screenshot (Folder Details):

The 'Folder' details for 'Requirements' are shown. The 'Team Access' field is set to 'TM Extruder retrofit program'. Red arrows indicate that this team access is inherited by subfolders that do not have their own team assigned.

Folder Details:

- Name: Requirements
- Description: [Empty]
- Status: Active
- Assigned Owner: Demo User
- Co-Owner Group: [Empty]
- Team Access: TM Extruder retrofit program
- Related Project: [Empty]
- Attachments: ☒
- Ctrlrd Items: ☒

Folder Navigator:

Folder/Number	Pos	Files..	Status	Rev	Gen
- Requirements	-	-	Active	-	-
Controlled Items:					

Once upper level Folders are saved (updated) and any of its sub folders do not yet have a team, they will inherit the team from the folder where the save action was started.

Change the Folder Team on Sub Folders

*Lock the Folder and use this action.
You must be Owner of the Folder.*

*The current team setting will get cleared so
you can create a new one for this folder.*

http://localhost - Folder - New Project - Mozilla Firefox

File Edit Views Search **Actions** Reports Tools Help

Clear Team Access

Folder

Name: New Project

Description:

Related Project:

Status: Active

☒ Top

☐ Attachments

☐ CtrlId Items

Assigned Owner: Innovator Admin

Co-Owner Group:

Team Access: [Create New...](#)

*Create a new „private“ Team for this
folder*