Notice of Liability

Aras Community Solution Add-on:

30-Aug-2013

Collaboration Folders (aka Item Folders)
Add-on-Solution Package v2-0

General Overview: „Collaboration Folders"

- ✓ Now with drag and drop support for files onto the folder grid. With the use of Team-based access controls this solution provides an effective way to orgainize, manage, and share attached files and controlled Documentation in hierarchical folders. (previous versions were called „Item Folders")

- ✓ Team access can be defined top down, starting at the „Root" folder, or anywhere in the folder structure. Providing a very effective and quick way to share your documentation with other Aras users over the web. It utilizes the standard Aras team features for this.

- ✓ Adds data model and logic for multi-level Folder structures that can be added on top of standard Aras Solutions „Product Engineering" & „Program Management"

- ✓ Each Folder can list simple attachments (files) or controlled Items (versionable). Like „Documents", or „CAD", or „Parts" (Poly Item List).

- ✓ „Folder Navigator":
    - ✓ Multi-level tree grid listing folder structure, attached files, and folder controlled items to navigate to.
    - ✓ Drag-and-Drop of local Files onto folder rows in „Folder Navigator". (top item and folder to add to must be locked by user for this action)
    - ✓ Lock / Unlock actions and actions to add File or Controlled Item from inside „Folder Navigator"

- ✓ Create Folder Structures from Folder Templates. Template rules on controlled items to either „Reference" or „Copy" the item for template to new structrure. Attached files can also be „Reference" or „Copy" (default = „Copy")

- ✓ Folder Structures can be linked to other Item Types (via property: top_item_folder_id). Examples are included how to add folders to Program or Project items.

What's new in this version

V2-0

✓ Common grid handler (utiltities) improvements

✓ Added has_sub_folder, has_controlled_items,has_files flags to "Folder"

✓ Improved grid loading speed based on using has_sub_folder flag.

✓ Added internationalization for toolbar, menus and messages of folder Navigator.
  (language files in: Client/Solutions/ItemFolders/xml)

✓ Added more context menu actions on folder grid (if top folder parent item is locked)
  - Add Sub Folder (action and dialog)

✓ Added CloseNode event to grid's HTML code

✓ Improved status messages in status bar (removed status msg from toolbar)

✓ Added control flags on Folder to disallow adding Attachments and to disallow adding Controlled Items and to disallow adding Sub Folder. These flags can be set on Template folders only. This way you can drive what can be added to folders on which level of the hierarchy from the folder template.

✓ Many smaller improvements to grid logic (more robust)

Version History

<u>Versions:</u>

V1-0 Initial packaging of various packages (dependency to PLM Common Utilities)

V1-3 Improvements to Grid display. More error handling

V1-4

(Dependency to Common Utilities (formerly named PLM Common Utilities) improvements to launching documents from grid.
Also tested on IE9.   Grid Icons indicating attachments. (must new copy .gif files to code tree) links top folders to standard
Program and Projects Item Types.

V1-5 Minor improvements on folder tree grid. Show Controlled Items before sub folders.

V1-6

Made folder files and controlled item numbers show as link. Common grid handler (utiltities) improvements
Added phantom rows for grouping Attachment
Added context menu actions on folder grid (if top folder parent item is locked)
  - Lock, Unlock
  - Add Folder Attachment
  - Add Folder Controlled Item

Added drag-n-drop for one or more local files onto folder grid ('Folder rows', if locked)
Added is_shared icon display on folder grid for shared files
Added effectivity modes and filter drop down on folder grid for"current" and   "latest released" view of controlled items
Folder Templates: Added null relationship to register methods for auto numbers of   folder controlled items (poly item).
Copy from Folder Templates: Improved logic for "Reference" or "Copy" option on relationships to Controlled Items. - Files of
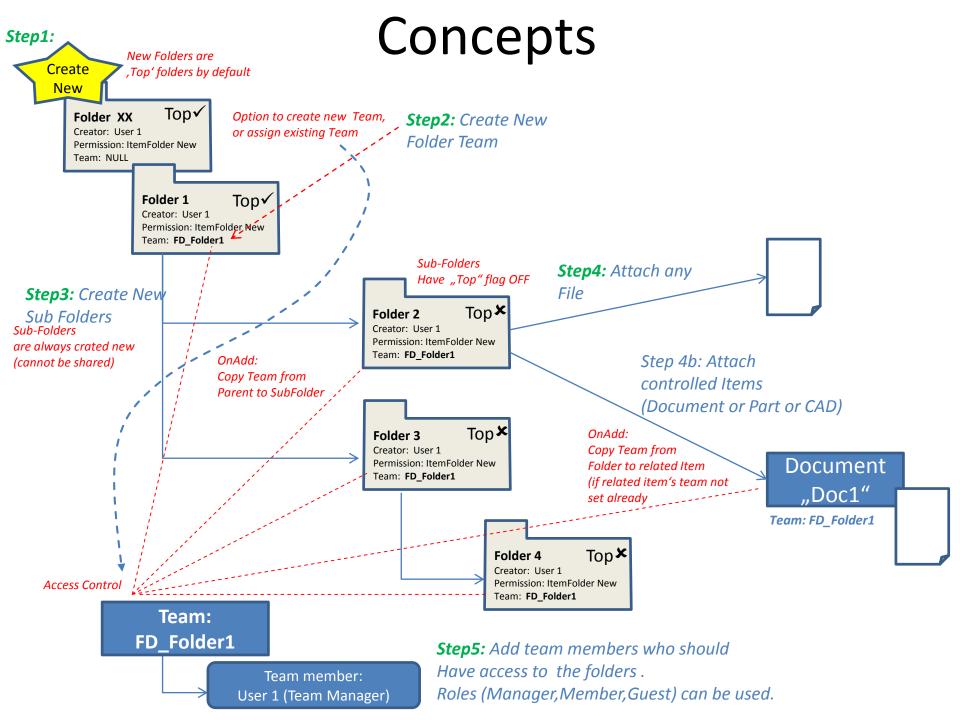documents are now physically copied in vault.
Updated grid html field and logic to adjust and prepare for easier upgrade to Innovator 10 (TreeGridContainer)

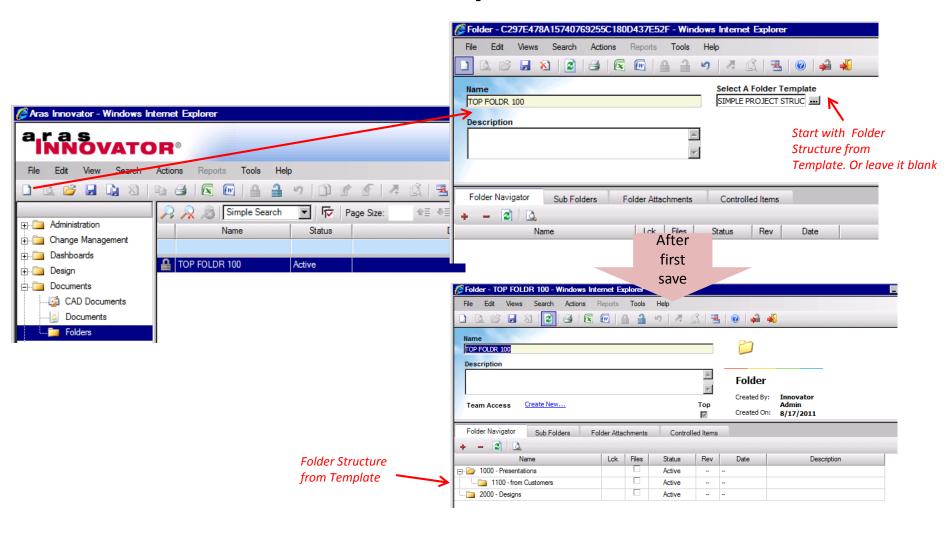**V1-8   Never released – added drag and drop and context menu actions. Then turned into v2-0**

Installation

- Use the PackageImportExportUtilities to import the package „Collaboration Folders v2-0"

- Extract package to directory accessible to the packaging import tool.

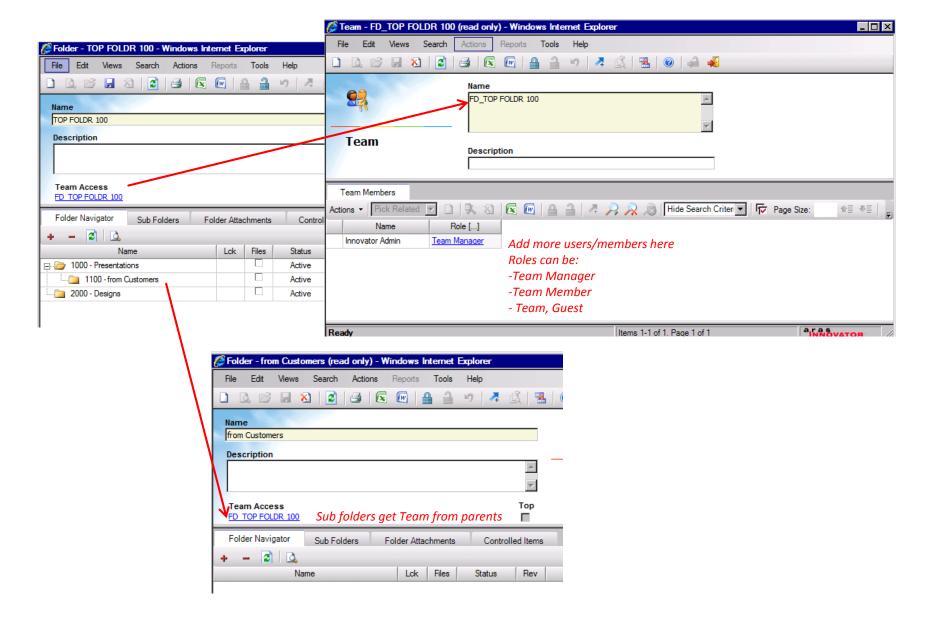- Read the „READ_ME.txt" file provided in zip-package to follow installation step-by-step.
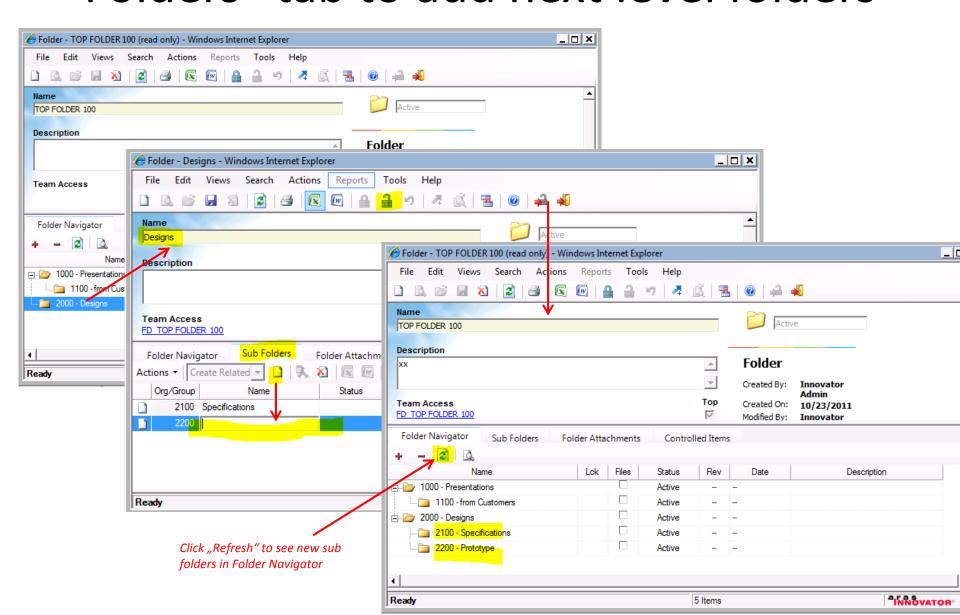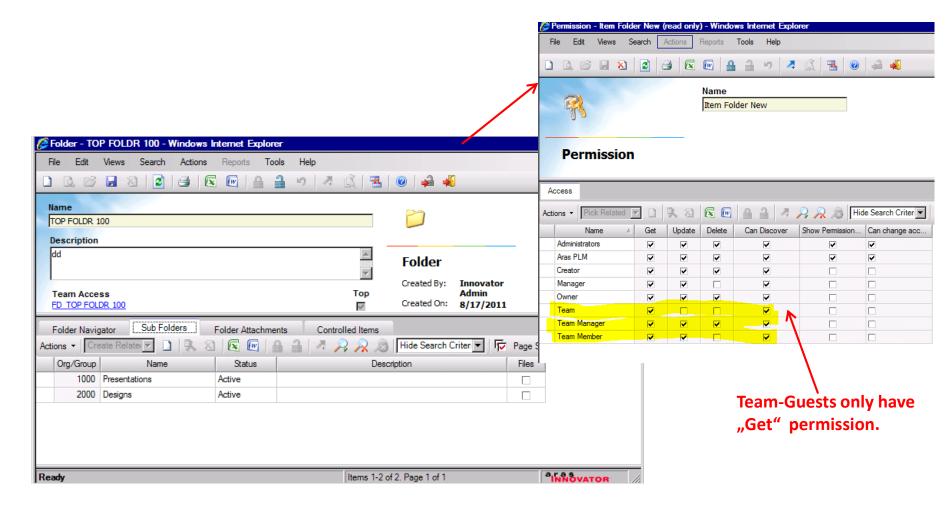
  → You MUST use the „Merge" option.

Concepts

Step1:

Create New

New Folders are 'Top' folders by default

Folder XX   Top ✓
Creator: User 1
Permission: ItemFolder New
Team: NULL

Option to create new Team, or assign existing Team

Step2: *Create New Folder Team*

Folder 1   Top ✓
Creator: User 1
Permission: ItemFolder New
Team: **FD_Folder1**

Step3: *Create New Sub Folders*

Sub-Folders are always crated new (cannot be shared)

Sub-Folders Have „Top" flag OFF

Step4: *Attach any File*

Folder 2   Top ✗
Creator: User 1
Permission: ItemFolder New
Team: **FD_Folder1**

OnAdd: Copy Team from Parent to SubFolder

Step 4b: Attach controlled Items (Document or Part or CAD)

Folder 3   Top ✗
Creator: User 1
Permission: ItemFolder New
Team: **FD_Folder1**

OnAdd: Copy Team from Folder to related Item (if related item's team not set already

Document „Doc1"

Team: FD_Folder1

Folder 4   Top ✗
Creator: User 1
Permission: ItemFolder New
Team: **FD_Folder1**

Access Control

Team: FD_Folder1

Team member: User 1 (Team Manager)

Step5: *Add team members who should Have access to the folders . Roles (Manager,Member,Guest) can be used.*

New Top Folder

Start with Folder Structure from Template. Or leave it blank

After first save

Folder Structure from Template

Folder assigned Teams

Open/View „Folder" and use „Sub Folders" tab to add next level folders

Click „Refresh" to see new sub folders in Folder Navigator

Folder Permissions
Controlling the Team Access

Team-Guests only have „Get" permission.

You can use the Folder Stucture (Navigator) with other Item Types (as Root Items)

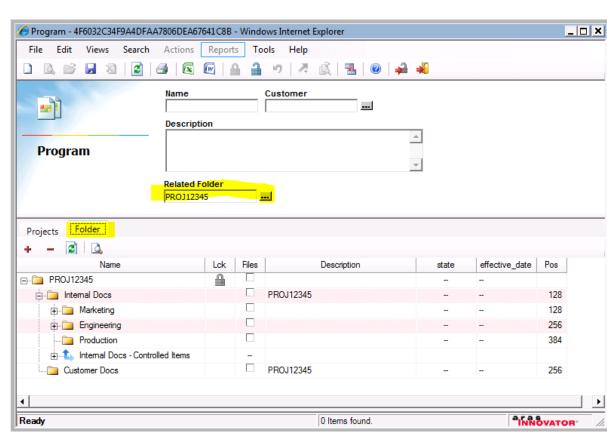**Included Examples:** Add a link to Folder Structures from Program and Project items.

New Property: „**top_item_folder_id**"
is required on these items.

Then, add new „non related" realtionship
i.e. to Program: „**Program Folders**"
On this realtionship set GridView to Form:
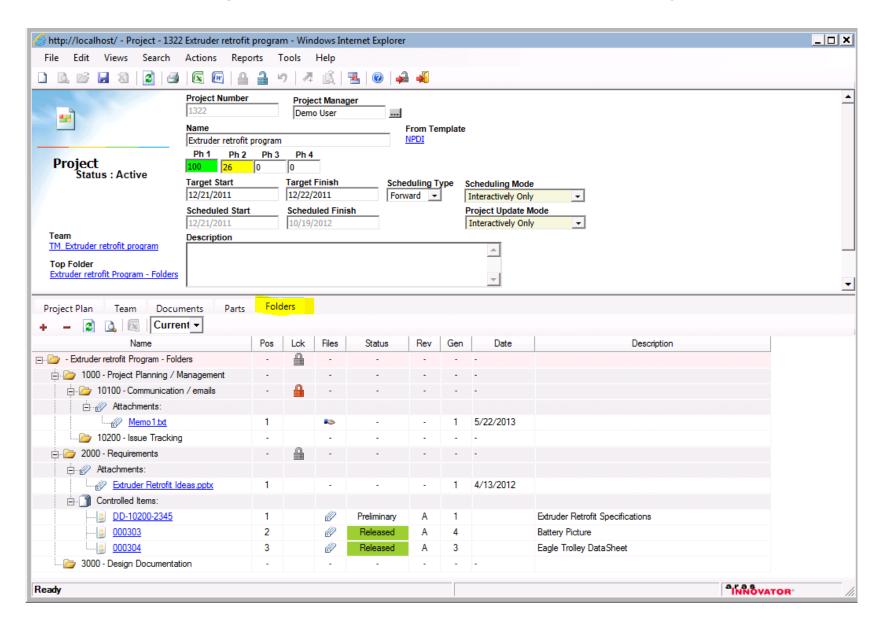„**Item Folder Structure Grid**"

Edit method:
„ **Item Folder Struct Grid Handler**"
and add logic for root item types to the
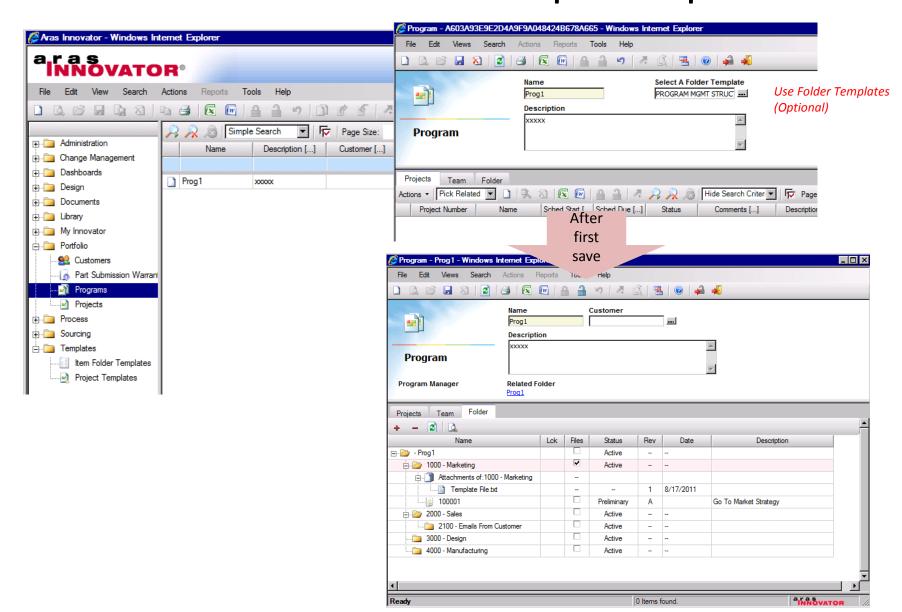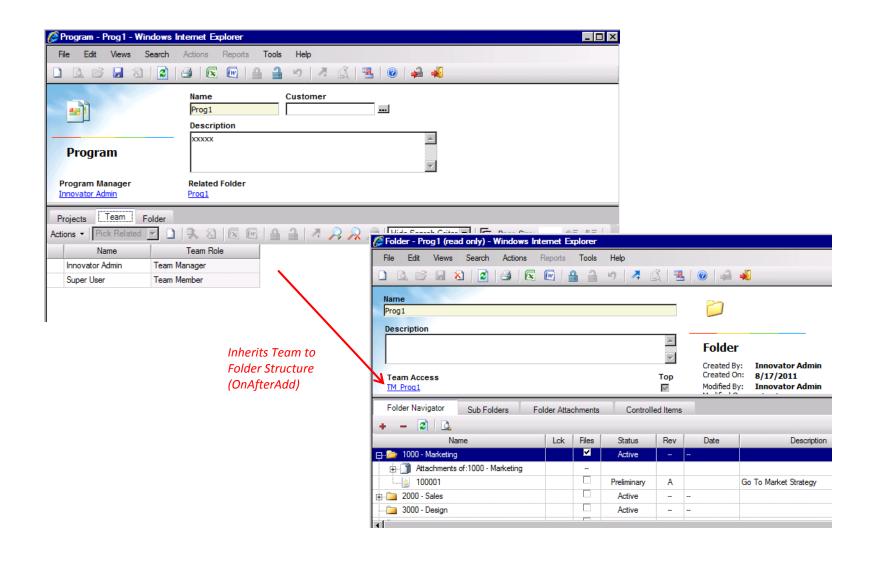switch statement of function
„ **initGlobalVariables**"


```
switch (thisItemType)
  {
    case "Item Folder Template":
    case "Program":
    case "Project":
        folderLink = thisItem.getProperty("top_item_folder_id","");
```

Projects Folders Example

New Program with Folder Stucture and Create from Folder Template option

Program Team Tab

Inherits Team to Folder Structure (OnAfterAdd)

Data Model