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### **Aras Community Solution Add-on:**

24-Mar-2014

Collaboration Folders (aka Item Folders)
Add-on-Solution Package v3-0

## General Overview: "Collaboration Folders"

- Now with drag and drop support (not in Aras-10, yet) for files onto the folder grid. With the use of Team-based access controls this solution provides an effective way to organize, 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

#### **V3-0**

- ✓ Made compatible with Aras10 IE and Firefox (90% but still some minor issues).
- ✓ Reworked loading of folder tree with controlled items and files. Uses "RepeatItemConfig" action now, which allows to load full structure with "released" or "current" effectivity condition at once at acceptable performance.
- ✓ Loading of full structure will allow search feature in the future -- but not implemented, yet
- ✓ Needed separate toolbar xml for Aras10 and Aras9 (because of different icon paths)
- ✓ Some forms have html field with value set to "Aras9" or "Aras10" to drive conditional code of Folder Navigator Grid
- ✓ Code tree overlay has grid icons (.gif) from Aras9 added to GridIcons folder
- ✓ Added fields "related\_projects" to Document, CAD, and Part item types.
- ✓ If folders used on Project or Program, then new logic will copy the keyed\_name of project/program to new folder property "related\_project\_keyed\_name" all sub folder will also inherit the value for "related\_project\_keyed\_name" from their parent folder all controlled items added to a folder will get this project/program keyed\_name copy to their property "related\_projects" (if connected to more folders the different project/program names get listed in a comma separated list) on main grid documents can then be search for by "project name"

## **Version History**

#### Versions:

#### 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

#### **Versions:**

- 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.

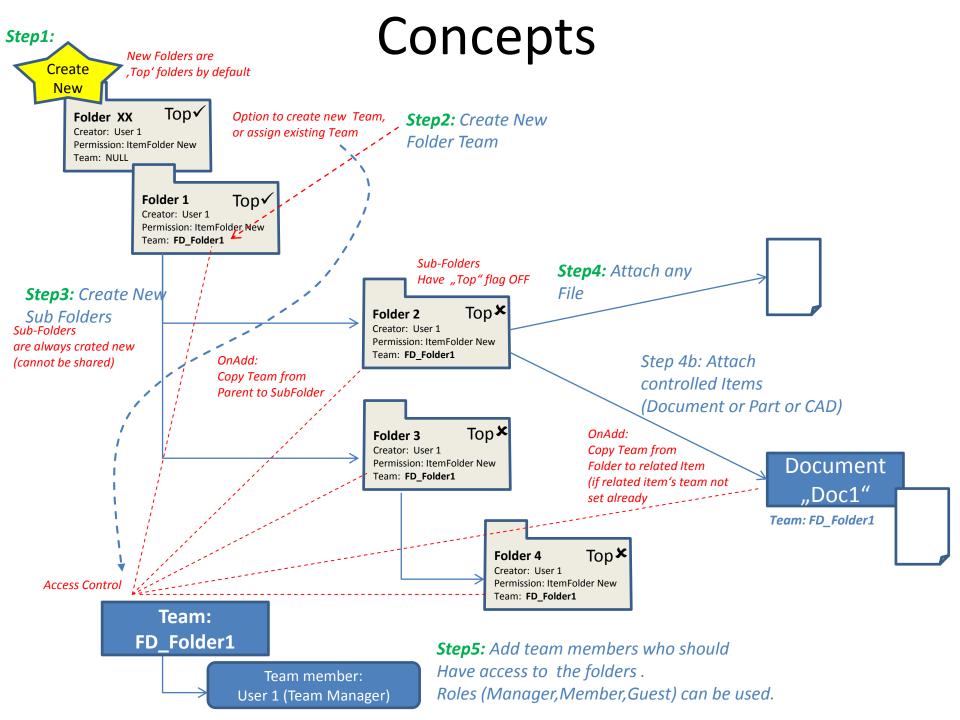
Updated grid html field and logic to adjust and prepare for easier upgrade to Innovator 10 (TreeGridContainer)

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

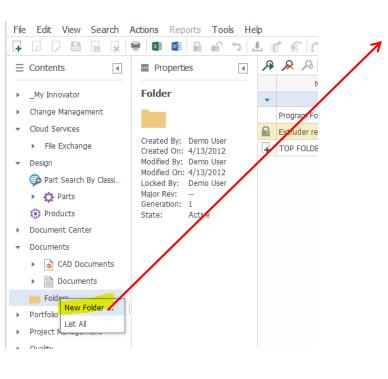
## Installation

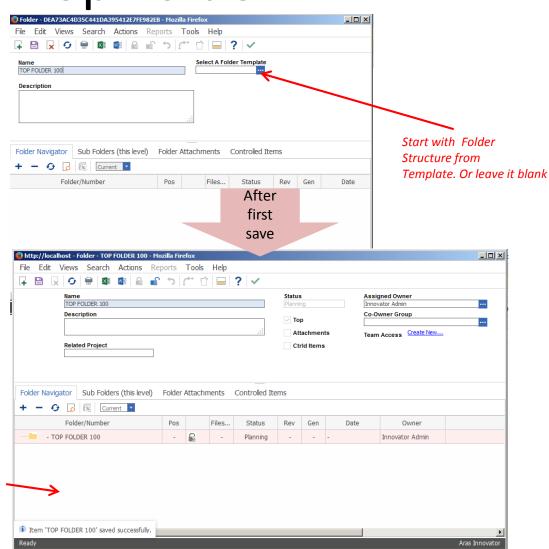
- Use the PackageImportExportUtilities to import the package "Collaboration Folders v3-0"
- Extract package to directory accessible to the packaging import tool.
- Read the "READ\_ME.txt" file provided in zip-package to follow installation step-by-step.

→ You MUST use the "Merge" option.



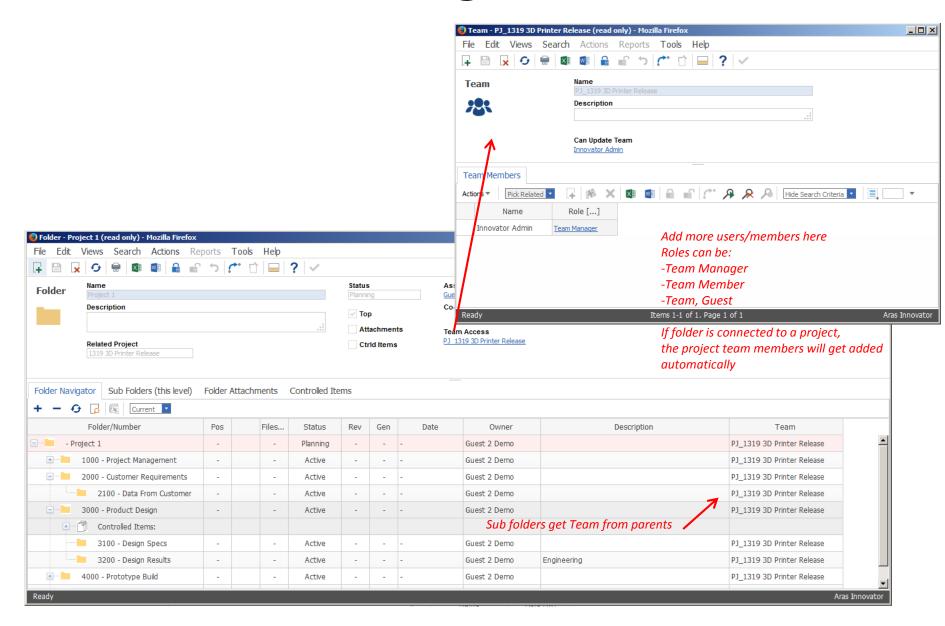
# New Top Folder



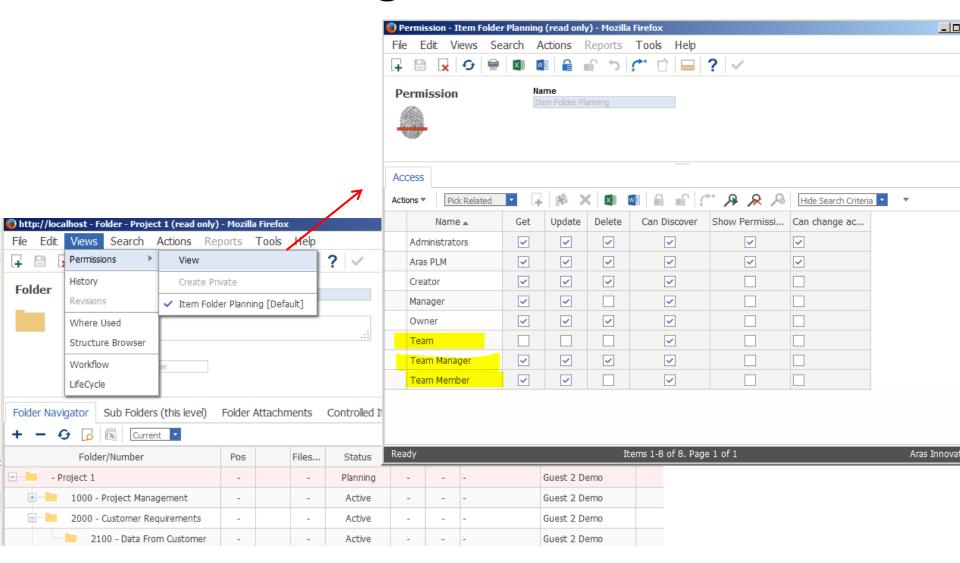


Folder Structure from Template

# Folder assigned Teams



# Folder Permissions Controlling the Team Access



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

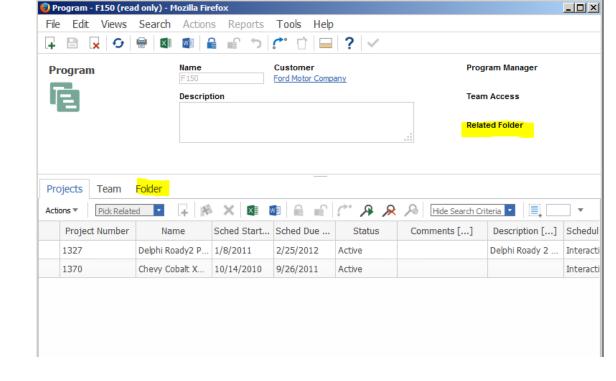
**Included Examples:** Add a link to Folder Structures from Program and Project items.

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"

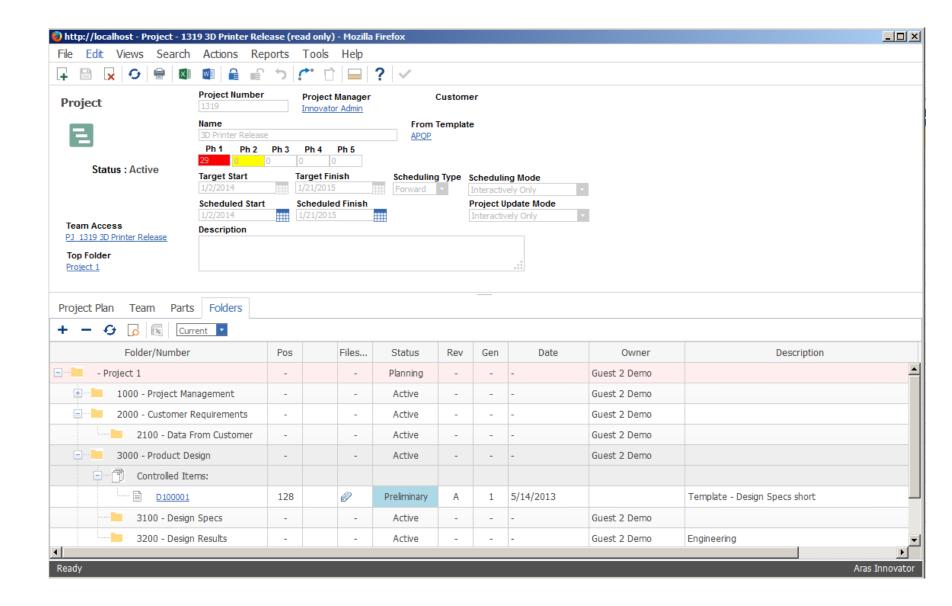
#### Edit method:

" 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



## Data Model

