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## 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 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 structure. 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 (utilities) 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 (utilities) 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)

OnAdd:  
Copy Team from  
Parent to SubFolder

Sub-Folders  
Have „Top“ flag OFF

**Step4:** Attach any  
File

Folder 2

Top✗

Creator: User 1  
Permission: ItemFolder New  
Team: FD\_Folder1

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)

Folder 4

Top✗

Creator: User 1  
Permission: ItemFolder New  
Team: FD\_Folder1

Document

„Doc1“

Team: FD\_Folder1

Access Control

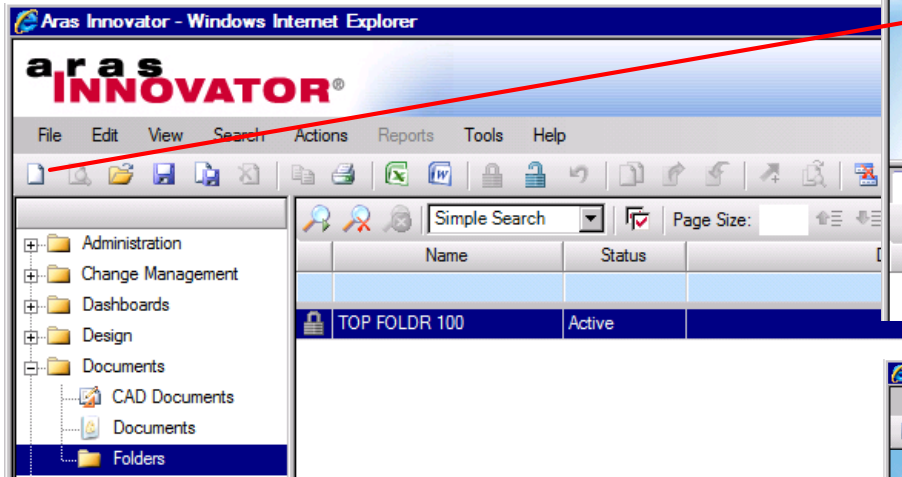
Team:  
FD\_Folder1

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



Folder - C297E478A15740769255C180D437E52F - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Name: TOP FOLDR 100

Select A Folder Template: SIMPLE PROJECT STRUC ...

Description: [ ]

Folder Navigator: Sub Folders Folder Attachments Controlled Items

Name	Lck	Files	Status	Rev	Date
------	-----	-------	--------	-----	------

Start with Folder Structure from Template. Or leave it blank

After first save

Folder - TOP FOLDR 100 - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Name: TOP FOLDR 100

Description: [ ]

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

Created By: Innovator Admin  
Created On: 8/17/2011

Folder Navigator: Sub Folders Folder Attachments Controlled Items

Name	Lck	Files	Status	Rev	Date	Description
1000 - Presentations		<input type="checkbox"/>	Active	--	--	
1100 - from Customers		<input type="checkbox"/>	Active	--	--	
2000 - Designs		<input type="checkbox"/>	Active	--	--	

Folder Structure from Template

# Folder assigned Teams

The image shows two overlapping browser windows. The left window, titled 'Folder - TOP FOLDER 100 - Windows Internet Explorer', displays a folder's details. The 'Team Access' field shows a link to 'FD\_TOP FOLDER 100'. The 'Folder Navigator' at the bottom lists subfolders: '1000 - Presentations', '1100 - from Customers', and '2000 - Designs'. The right window, titled 'Team - FD\_TOP FOLDER 100 (read only) - Windows Internet Explorer', shows the team configuration page. The 'Name' field is 'FD\_TOP FOLDER 100'. The 'Team Members' table lists 'Innovator Admin' with the role 'Team Manager'. A red arrow points from the 'Team Access' link in the left window to the 'Name' field in the right window. Another red arrow points from the '1100 - from Customers' folder in the left window's navigator to the bottom window.

**Folder - TOP FOLDER 100 - Windows Internet Explorer**

Name: TOP FOLDER 100

Description:

Team Access: [FD\\_TOP FOLDER 100](#)

**Folder Navigator**

Name	Lck	Files	Status
1000 - Presentations		<input type="checkbox"/>	Active
1100 - from Customers		<input type="checkbox"/>	Active
2000 - Designs		<input type="checkbox"/>	Active

**Team - FD\_TOP FOLDER 100 (read only) - Windows Internet Explorer**

Name: FD\_TOP FOLDER 100

Description:

**Team Members**

Name	Role [...]
Innovator Admin	<a href="#">Team Manager</a>

Ready Items 1-1 of 1. Page 1 of 1

Add more users/members here  
Roles can be:  
-Team Manager  
-Team Member  
- Team, Guest

The image shows a browser window titled 'Folder - from Customers (read only) - Windows Internet Explorer'. The 'Name' field is 'from Customers'. The 'Team Access' field shows a link to 'FD\_TOP FOLDER 100'. The 'Folder Navigator' at the bottom is partially visible. A red arrow points from the '1100 - from Customers' folder in the left window's navigator to the 'Team Access' link in this window.

**Folder - from Customers (read only) - Windows Internet Explorer**

Name: from Customers

Description:

Team Access: [FD\\_TOP FOLDER 100](#)

**Folder Navigator**

Name	Lck	Files	Status	Rev
------	-----	-------	--------	-----

Sub folders get Team from parents



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

The image consists of three overlapping screenshots of the Aras Innovator web interface, demonstrating the process of adding subfolders.

**Top Screenshot:** Shows the 'Folder - TOP FOLDER 100 (read only)' window. The 'Name' field contains 'TOP FOLDER 100' and the 'Description' field is empty. The 'Team Access' section shows 'FD TOP FOLDER 100'. The 'Folder Navigator' on the left shows a tree structure with '1000 - Presentations', '1100 - from Customers', and '2000 - Designs'.

**Middle Screenshot:** Shows the 'Folder - Designs' window. The 'Name' field contains 'Designs' and the 'Description' field is empty. The 'Team Access' section shows 'FD TOP FOLDER 100'. The 'Folder Navigator' on the left shows a tree structure with '1000 - Presentations', '1100 - from Customers', and '2000 - Designs'. A red arrow points to the 'Designs' folder in the 'Folder Navigator'.

**Bottom Screenshot:** Shows the 'Folder - TOP FOLDER 100 (read only)' window. The 'Name' field contains 'TOP FOLDER 100' and the 'Description' field contains 'xx'. The 'Team Access' section shows 'FD TOP FOLDER 100'. The 'Folder Navigator' on the left shows a tree structure with '1000 - Presentations', '1100 - from Customers', '2000 - Designs', '2100 - Specifications', and '2200 - Prototype'. A red arrow points to the '2200 - Prototype' folder in the 'Folder Navigator'. A red arrow points to the 'Sub Folders' tab in the 'Folder Navigator'.

**Annotations:**

- A red arrow points from the 'Designs' folder in the 'Folder Navigator' of the middle screenshot to the '2200 - Prototype' folder in the 'Folder Navigator' of the bottom screenshot.
- A red arrow points from the 'Sub Folders' tab in the 'Folder Navigator' of the bottom screenshot to the '2200 - Prototype' folder.

**Text:**

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

Name	Lck	Files	Status	Rev	Date	Description
1000 - Presentations		<input type="checkbox"/>	Active	--	--	
1100 - from Customers		<input type="checkbox"/>	Active	--	--	
2000 - Designs		<input type="checkbox"/>	Active	--	--	
2100 - Specifications		<input type="checkbox"/>	Active	--	--	
2200 - Prototype		<input type="checkbox"/>	Active	--	--	

Ready 5 Items

# Folder Permissions

## Controlling the Team Access

**Folder - TOP FOLDR 100 - Windows Internet Explorer**

Name: TOP FOLDR 100

Description: dd

Team Access: [FD\\_TOP FOLDR 100](#)

Folder

Created By: Innovator Admin

Created On: 8/17/2011

Folder Navigator: Sub Folders

Org/Group	Name	Status	Description	Files
1000	Presentations	Active		<input type="checkbox"/>
2000	Designs	Active		<input type="checkbox"/>

**Permission - Item Folder New (read only) - Windows Internet Explorer**

Name: Item Folder New

Permission

Access

Actions: Pick Related

Name	Get	Update	Delete	Can Discover	Show Permission...	Can change acc...
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aras PLM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Creator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Team	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Team Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Team Member	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Team-Guests only have „Get“ permission.

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

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

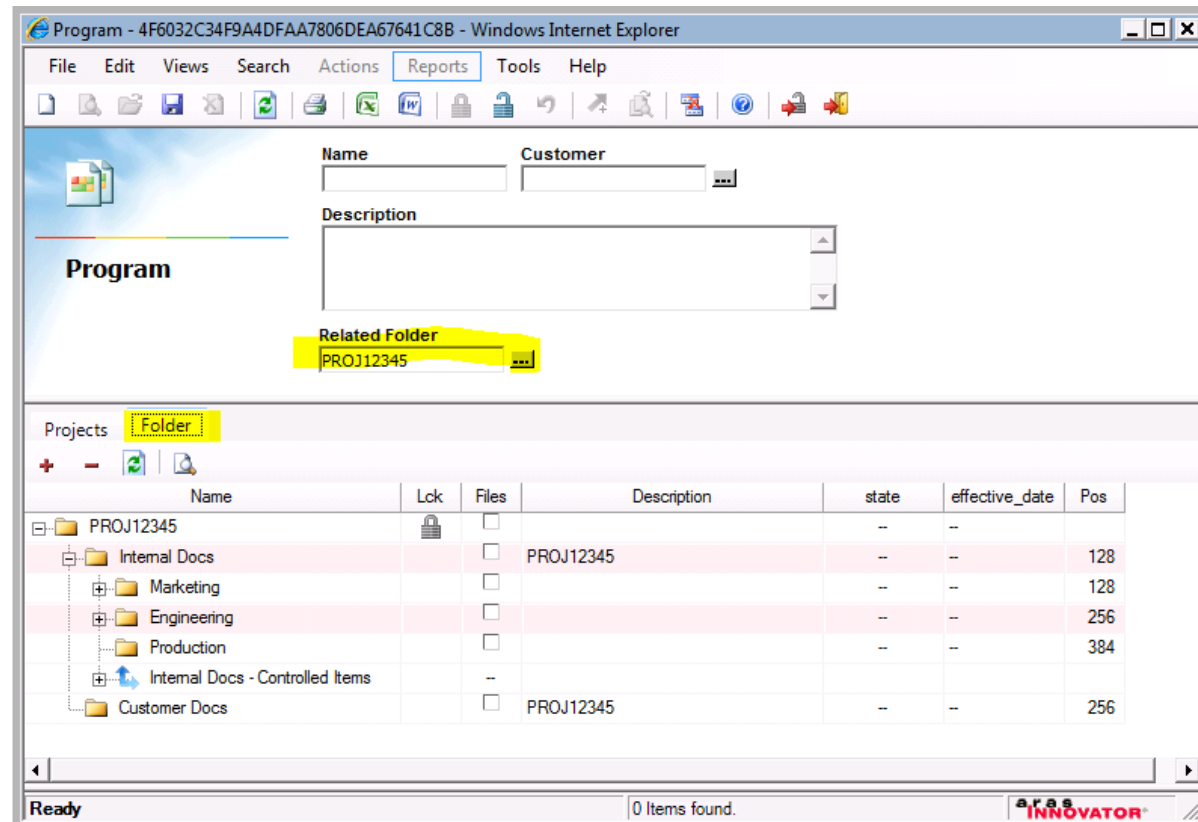
New Property: „**top\_item\_folder\_id**“ is required on these items.

Then, add new „non related“ relationship i.e. to Program: „**Program Folders**“  
On this relationship 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

http://localhost/ - Project - 1322 Extruder retrofit program - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Project Number: 1322 Project Manager: Demo User

Name: Extruder retrofit program From Template: [NPDI](#)

Ph 1: 100 Ph 2: 26 Ph 3: 0 Ph 4: 0

Target Start: 12/21/2011 Target Finish: 12/22/2011 Scheduling Type: Forward Scheduling Mode: Interactively Only

Scheduled Start: 12/21/2011 Scheduled Finish: 10/19/2012 Project Update Mode: Interactively Only

Description:

Team: [TM Extruder retrofit program](#)

Top Folder: [Extruder retrofit Program - Folders](#)

Project Plan Team Documents Parts **Folders**

+ -

# New Program with Folder Structure and Create from Folder Template option

The image shows the Aras Innovator web application interface. On the left is a navigation tree with folders like Administration, Change Management, Dashboards, Design, Documents, Library, My Innovator, Portfolio, Customers, Part Submission Warrant, **Programs**, Projects, Process, Sourcing, and Templates. The 'Programs' folder is selected, showing a list with 'Prog1'. The main area displays the 'Program' form with fields for Name (Prog1), Description (xxxxx), and Customer. A 'Select A Folder Template' dropdown is set to 'PROGRAM MGMT STRUC'. A red arrow points from the text 'Use Folder Templates (Optional)' to this dropdown.

Below the form is the 'Program Manager' table, which shows the folder structure created for 'Prog1'. The table has columns: Name, Lck, Files, Status, Rev, Date, and Description.

Name	Lck	Files	Status	Rev	Date	Description
- Prog1						
1000 - Marketing		<input checked="" type="checkbox"/>	Active	--	--	
Attachments of: 1000 - Marketing						
Template File.txt				1	8/17/2011	
100001			Preliminary	A		Go To Market Strategy
2000 - Sales		<input type="checkbox"/>	Active	--	--	
2100 - Emails From Customer		<input type="checkbox"/>	Active	--	--	
3000 - Design		<input type="checkbox"/>	Active	--	--	
4000 - Manufacturing		<input type="checkbox"/>	Active	--	--	

The status bar at the bottom shows 'Ready' and '0 Items found.' The Aras Innovator logo is in the bottom right corner.

# Program Team Tab

Program - Prog1 - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Name: Prog1 Customer: [ ]

Description: xxxxxx

Program Manager: [Innovator Admin](#)

Related Folder: [Prog1](#)

Projects Team Folder

Actions: Pick Related

Name	Team Role
Innovator Admin	Team Manager
Super User	Team Member

*Inherits Team to  
Folder Structure  
(OnAfterAdd)*

Folder - Prog1 (read only) - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Name: Prog1

Description: [ ]

Folder

Created By: Innovator Admin  
Created On: 8/17/2011  
Modified By: Innovator Admin

Team Access: [TM\\_Prog1](#)

Folder Navigator

Name	Lck	Files	Status	Rev	Date	Description
1000 - Marketing		<input checked="" type="checkbox"/>	Active	--	--	
Attachments of: 1000 - Marketing		--				
100001		<input type="checkbox"/>	Preliminary	A		Go To Market Strategy
2000 - Sales		<input type="checkbox"/>	Active	--	--	
3000 - Design		<input type="checkbox"/>	Active	--	--	

# Data Model

