

# Notice of Liability

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## Aras Community Solution Add-on:

30-Aug-2013

## Collaboration Folders (aka Item Folders)

V2-0

## User Guide

# Access from Main Window TOC

The screenshot displays the Aras Innovator web interface. The top window shows the main TOC (Table of Contents) with a search filter applied to show only root-level folders. The bottom window shows a detailed view of a folder named "Extruder retrofit Program - Folders".

**Top Window: Main Window TOC**

Search filter: *Use search filter to hide template folders And show root level folders only*

Name	Status	Description	Files	Top	Is Templ.	Date [...]	Number
New Project	Active			<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/11/2012 10:20:47 ...	IF00000017
Extruder retrofit Program - Folders	Active			<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/13/2012 12:41:52 ...	IF00000033
Project 1	Active			<input checked="" type="checkbox"/>	<input type="checkbox"/>	5/14/2013 7:26:47 AM	IF00000039

**Bottom Window: Folder - Extruder retrofit Program - Folders**

Name: Extruder retrofit Program - Folders

Description:

Folder

Created By: Demo User  
Created On: 4/13/2012  
Modified By: Innovator Admin  
Modified On: 5/22/2013

Assigned Owner: Demo User  
Co-Owner Group:

Team Access: [IM Extruder retrofit program](#)

Folder Navigator: Sub Folders (this level) | Folder Attachments | Controlled Items

Name	Pos	Lck	Files	Status	Rev	Gen	Date	Description
- Extruder retrofit Program - Folders	-	🔒	-	-	-	-	-	
1000 - Project Planning / Management	-	-	-	-	-	-	-	
10100 - Communication / emails	-	🔒	-	-	-	-	-	
10200 - Issue Tracking	-	-	-	-	-	-	-	
2000 - Requirements	-	🔒	-	-	-	-	-	
Attachments:								
Controlled Items:								
DD-10200-2345	1		🔗	Preliminary	A	1		Extruder Retrofit Specifications
000303	2		🔗	Released	A	4		Battery Picture
000304	3		🔗	Released	A	3		Eagle Trolley DataSheet
3000 - Design Documentation	-	-	-	-	-	-	-	

**Annotations:**

- Administrators have access to folder Templates* (points to the Templates folder in the left sidebar)
- All Employees access to folder instances.* (points to the Item Folder Template and Project Templates folders in the left sidebar)

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

# Folder Navigator

http://localhost/ - Folder - Extruder retrofit Program - Folders - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Name  
Extruder retrofit Program - Folders

Description  
*Locked by other user !*

Assigned Owner  
Innovator Admin

Co-Owner Group

Top ☒ Attachments ☐ Ctrl'd Items ☐

Team Access  
[TM Extruder retrofit program](#)

Folder Navigator Sub Folders (this level) Folder Attachments Controlled Items

Current

Name	Pos	Lck	Files	Status	Rev	Gen	Date	Description
- Extruder retrofit Program - Folders	-		-	-	-	-	-	
1000 - Project Planning / Management	-		-	-	-	-	-	
10100 - Communication / emails	-		-	-	-	-	-	
Attachments:								
Memo1.txt	1			-	-	1	5/22/2013	
10200 - Issue Tracking	-		-	-	-	-	-	
2000 - Requirements	-		-	-	-	-	-	
Attachments:								
Extruder Retrofit Ideas.pptx	1			-	-	1	4/13/2012	
Controlled Items:								
DD-10200-2345	1			Preliminary	A	1		
000303	2			Released	A	4		
000304	3			Released	A	3		
3000 - Design Documentation	-		-	-	-	-	-	

Row actions always present

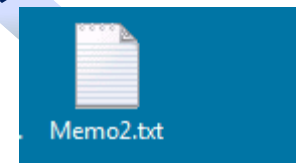
- Refresh this Folder
- View Folder
- Lock
- Unlock
- Add Controlled Item to Folder (new)...
- Add Controlled Item to Folder (pick)...
- Add File to Folder...
- Add Sub Folder...
- Promote Folders to Active (down)
- Promote Folders to Archived (down)

More row actions when top item is locked by user

Row actions always present

Drag n Drop to Folder row

From Desktop or File Explorer  
drag local files to Folder or Attachments row.



From Desktop or File Explorer  
drag local files to Folder or Attachments row.

Click on link to open the Document meta data

Highlighted rows on folder 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.

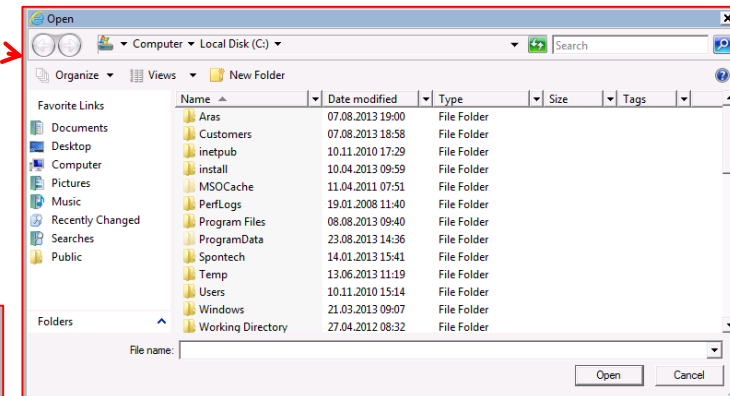
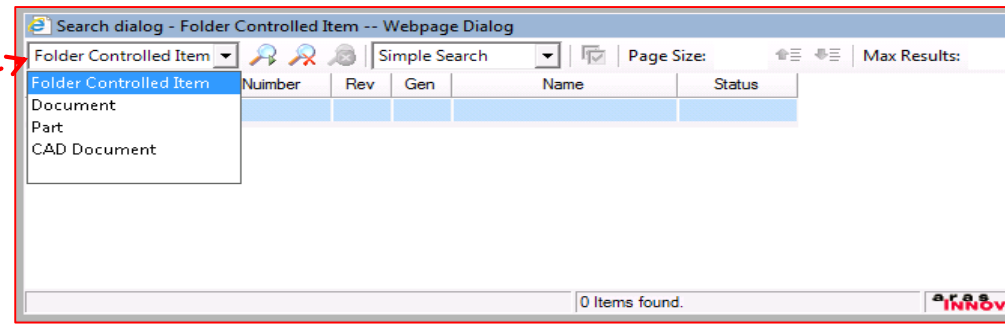
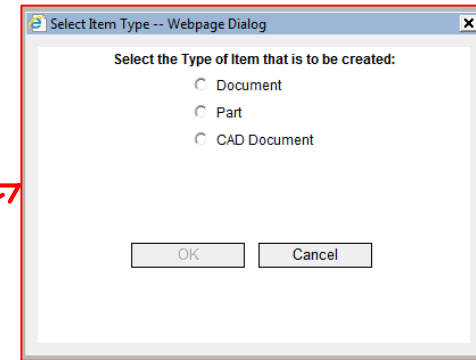
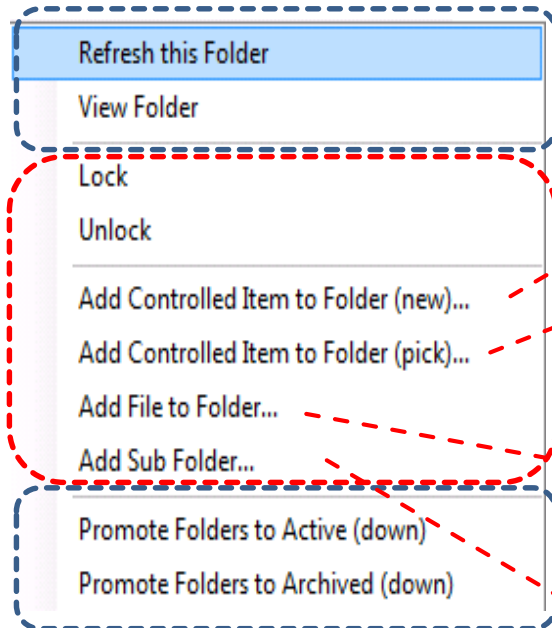
Grouping Rows.  
(No records in database)

# 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

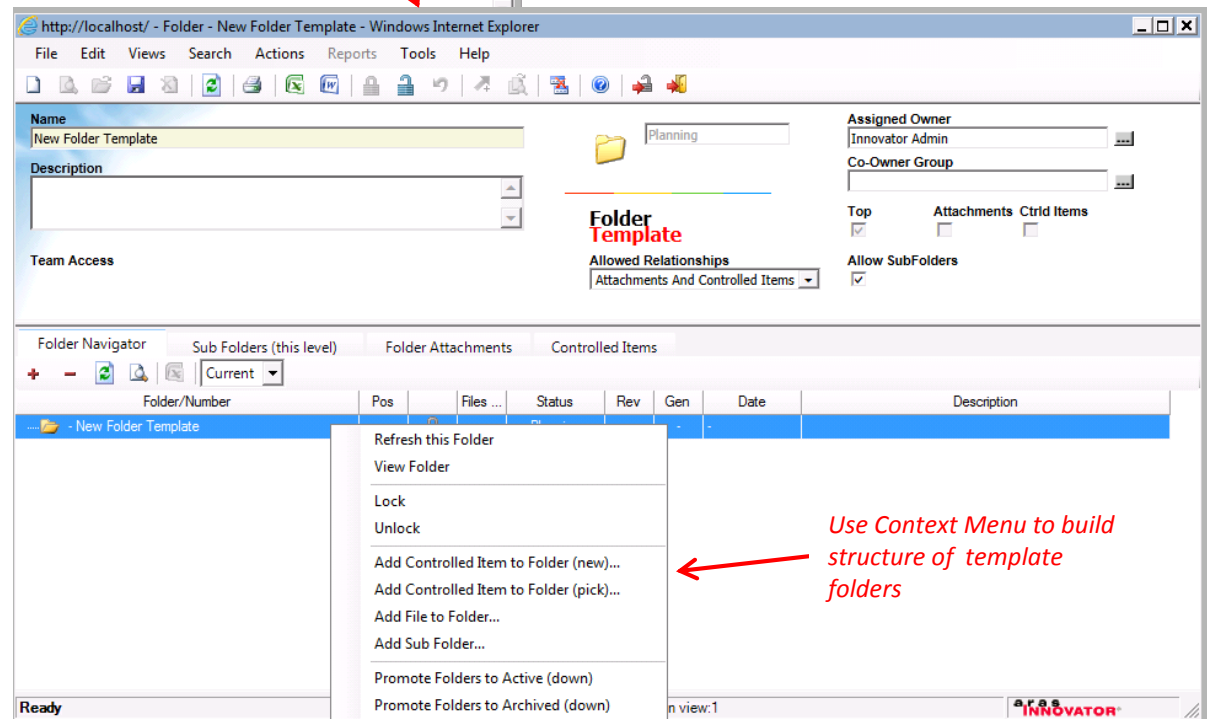
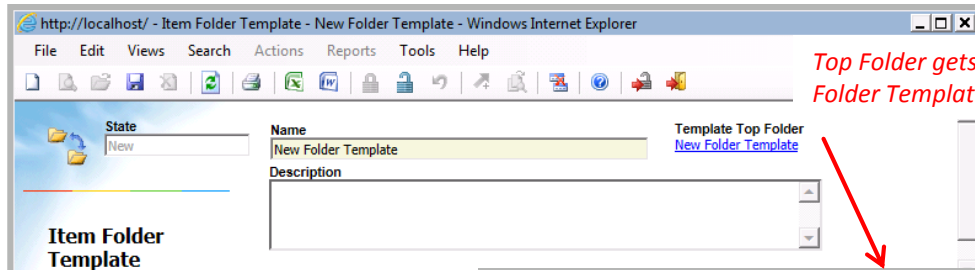
These Methods will be called when folder templates are copied to new folders. Any linked controlled items on folders will be created new with numbers generated from these methods. You may need to add your own methods or custom logic for your specific item numbering

```

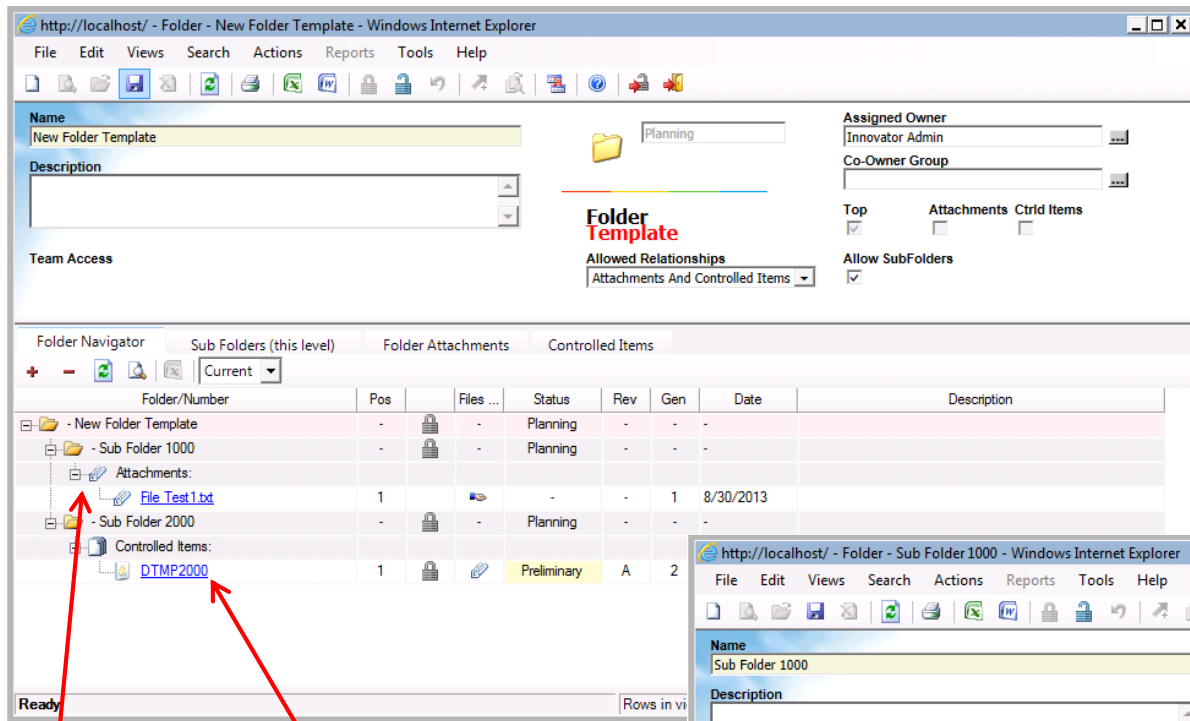
01 Dim newItemNumber As String = Me.getInnovator().getNextSequence("Default Document")
02 Return Me.getInnovator().newResult(newItemNumber)
03

```

# Top Folder of Folder Template



# Attachments & Controlled Items on Template Folders



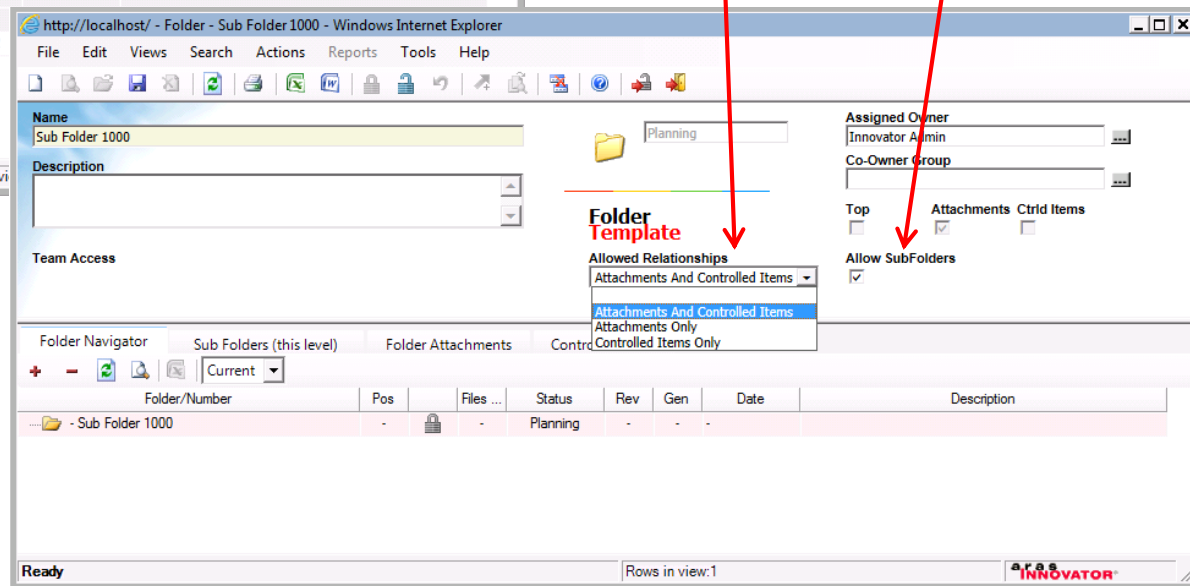
*On any template folder these options can be defined*

*Defines what information is allowed to be connected to this folder*

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

*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 !*





# Assigning Team Access to Folders

*Click on link to open the Team*

*This is a „private“ team for this folder containing the folder's name and item\_number*

*Lock the Team and add new members with roles: Manager, Member, or Guest.*

*The owner of the folder get automatically added as „Team Manager“ on new Teams.*

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

Folder Navigator

Folder/Number	Pos	Files ...	Status	Rev	Gen
- TESTING FROM TEMPLATE	-	-	Planning	-	-
1000 - Folder 1000	-	-	Planning	-	-
2000 - Folder 2000	-	-	Planning	-	-
3000 - Folder 3000	-	-	Planning	-	-

Rows in view: 4

Name	Role [...]
Innovator Admin	Team Manager
Demo User	Team Member



# 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 screenshot displays two web browser windows from the 'http://localhost/' address, showing a folder management interface. The left window, titled 'Folder - TESTING FROM TEMPLATE', shows a folder structure with subfolders '1000 - Folder 1000', '1100 - Sub Folder 1100', '1110 - Sub Folder 1110', '1111 - Sub Folder 1111', '2000 - Folder 2000', and '3000 - Folder 3000'. The '1110 - Sub Folder 1110' is selected. The right window, titled 'Folder - Sub Folder 1110 (read only)', shows the details for 'Sub Folder 1110' and its subfolder '1111 - Sub Folder 1111'. Red arrows indicate the inheritance of team access from the parent folder to the subfolder.

**Folder - TESTING FROM TEMPLATE**

Name: TESTING FROM TEMPLATE

Description: xx

Team Access: [FT\\_TESTING FROM TEMPLATE \(IF00000010\)](#)

Assigned Owner: Innovator Admin

Co-Owner Group: IF00000010

Folder Number: IF00000010

Folder: Top Attachments Ctrl Items

Folder Navigator: Sub Folders (this level) Folder Attachments

Folder/Number	Pos	Files	Status
- TESTING FROM TEMPLATE	-	-	Pla
- 1000 - Folder 1000	-	-	Pla
- 1100 - Sub Folder 1100	-	-	Pla
- 1110 - Sub Folder 1110	-	-	Pla
- 1111 - Sub Folder 1111	-	-	Pla
- 2000 - Folder 2000	-	-	Pla
- 3000 - Folder 3000	-	-	Pla

Ready

**Folder - Sub Folder 1110 (read only)**

Name: Sub Folder 1110

Description:

Team Access: [FT\\_TESTING FROM TEMPLATE \(IF00000010\)](#)

Assigned Owner: [Innovator Admin](#)

Co-Owner Group: IF000000213

Folder Number: IF000000213

Folder: Top Attachments Ctrl Items

Folder Navigator: Sub Folders (this level) Folder Attachments

Folder/Number	Pos	Files	Status	Rev	Gen	Date	Description
- Sub Folder 1110	-	-	Planning	-	-	-	
- 1111 - Sub Folder 1111	-	-	Planning	-	-	-	

Ready

Rows in view: 2

INNOVATOR

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 to New Folder Team on Sub Folder

*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 - Sub Folder 1110 - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Name  
Sub Folder 1110

Description

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

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

http://localhost/ - Folder - Sub Folder 1110 (read only) - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Item Folder ClearTeamAccess

Name  
Sub Folder 1110

Description

Folder

Assigned Owner  
[Innovator Admin](#)

Co-Owner Group  
IF00000213

Team Access  
[FT\\_TESTING FROM TEMPLATE \(IF00000010\)](#)

Folder Navigator Sub Folders (this level) Folder Attachments Controlled Items

Current

Folder/Number	Pos	Files ...	Status	Rev	Gen	Date	Description
- Sub Folder 1110	-	-	Planning	-	-	-	
1111 - Sub Folder 1111	-	-	Planning	-	-	-	

Ready Rows in view:2 **INNOVATOR**