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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 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

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 (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 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.

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

File Edit View Search Actions Reports Tools Help

Contents

- My Innovator
- Change Management
- Cloud Services
 - File Exchange
- Design
 - Part Search By Classi...
 - Parts
 - Products
- Document Center
- Documents
 - CAD Documents
 - Documents
- Folders
 - New Folder...
 - List All
- Portfolio
- Project Management
- Quality

Properties

Folder

Created By: Demo User
Created On: 4/13/2012
Modified By: Demo User
Modified On: 4/13/2012
Locked By: Demo User
Major Rev: --
Generation: 1
State: Active

Folder - DEA73AC4D35C441DA395412E7FE982EB - Mozilla Firefox

Name: TOP FOLDER 100

Select A Folder Template

Description

Folder Navigator

Sub Folders (this level)

Folder Attachments

Controlled Items

Folder/Number

Pos

Files...

Status

Rev

Gen

Date

After first save

http://localhost - Folder - TOP FOLDER 100 - Mozilla Firefox

Name: TOP FOLDER 100

Description

Related Project

Status: Planning

Assigned Owner: Innovator Admin

Co-Owner Group

Team Access: Create New...

Folder Navigator

Sub Folders (this level)

Folder Attachments

Controlled Items

Folder/Number	Pos	Files...	Status	Rev	Gen	Date	Owner
- TOP FOLDER 100	-	-	Planning	-	-	-	Innovator Admin

Item 'TOP FOLDER 100' saved successfully.

Ready

Aras Innovator

Start with Folder Structure from Template. Or leave it blank

Folder Structure from Template

Folder assigned Teams

Folder - Project 1 (read only) - Mozilla Firefox

File Edit Views Search Actions Reports Tools Help

Folder Name: Project 1 Status: Planning

Description:

Related Project: 1319 3D Printer Release

☒ Top ☐ Attachments ☐ CtrlId Items

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

Folder/Number	Pos	Files...	Status	Rev	Gen	Date	Owner	Description	Team
- Project 1	-	-	Planning	-	-	-	Guest 2 Demo		PJ_1319 3D Printer Release
+ 1000 - Project Management	-	-	Active	-	-	-	Guest 2 Demo		PJ_1319 3D Printer Release
+ 2000 - Customer Requirements	-	-	Active	-	-	-	Guest 2 Demo		PJ_1319 3D Printer Release
+ 2100 - Data From Customer	-	-	Active	-	-	-	Guest 2 Demo		PJ_1319 3D Printer Release
+ 3000 - Product Design	-	-	Active	-	-	-	Guest 2 Demo		PJ_1319 3D Printer Release
Controlled Items:									
+ 3100 - Design Specs	-	-	Active	-	-	-	Guest 2 Demo		PJ_1319 3D Printer Release
+ 3200 - Design Results	-	-	Active	-	-	-	Guest 2 Demo	Engineering	PJ_1319 3D Printer Release
+ 4000 - Prototype Build	-	-	Active	-	-	-	Guest 2 Demo		PJ_1319 3D Printer Release

Team - PJ_1319 3D Printer Release (read only) - Mozilla Firefox

File Edit Views Search Actions Reports Tools Help

Team Name: PJ_1319 3D Printer Release Description:

Can Update Team: [Innovator Admin](#)

Team Members

Actions: Pick Related + X Excel Word Lock Unlock Refresh Find Add Remove Hide Search Criteria

Name	Role [...]
Innovator Admin	Team Manager

Ready Items 1-1 of 1. Page 1 of 1 Aras Innovator

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

If folder is connected to a project, the project team members will get added automatically

Sub folders get Team from parents

Folder Permissions

Controlling the Team Access

The screenshot displays the Aras Innovator interface, specifically the 'Permission - Item Folder Planning (read only)' window in Mozilla Firefox. A red arrow points from the 'View' option in the 'Folder' menu to the 'Access' tab in the main window.

Folder Navigator (Left Panel):

- Folder: - Project 1
- Sub Folders (this level):
 - 1000 - Project Management
 - 2000 - Customer Requirements
 - 2100 - Data From Customer

Access Tab (Main Window):

The 'Access' tab shows a table of permissions for the 'Item Folder Planning' item. The table includes columns for Name, Get, Update, Delete, Can Discover, Show Permissi..., and Can change ac....

Name	Get	Update	Delete	Can Discover	Show Permissi...	Can change ac...
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 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"/>

Ready Bar (Bottom):

Items 1-8 of 8. Page 1 of 1

Folder/Number	Pos	Files...	Status	Guest 2 Demo
- Project 1	-	-	Planning	
1000 - Project Management	-	-	Active	
2000 - Customer Requirements	-	-	Active	
2100 - Data From Customer	-	-	Active	

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", "");
```

The screenshot shows a web application interface with a menu bar (File, Edit, Views, Search, Actions, Reports, Tools, Help) and a toolbar. The main content area is divided into two sections. The top section, titled 'Program', contains a form for editing a program. It has a 'Name' field with the value 'F150', a 'Customer' field with the value 'Ford Motor Company', and a 'Description' field. To the right of the form are labels for 'Program Manager' and 'Team Access'. A yellow highlight is placed over the 'Related Folder' label. The bottom section, titled 'Folder', contains a table with columns: Project Number, Name, Sched Start..., Sched Due ..., Status, Comments [...], Description [...], and Schedule. The table has two rows of data. The first row has values: 1327, Delphi Rody2 P..., 1/8/2011, 2/25/2012, Active, and Interacti. The second row has values: 1370, Chevy Cobalt X..., 10/14/2010, 9/26/2011, Active, and Interacti. A yellow highlight is placed over the 'Folder' tab label.

Project Number	Name	Sched Start...	Sched Due ...	Status	Comments [...]	Description [...]	Schedule
1327	Delphi Rody2 P...	1/8/2011	2/25/2012	Active		Delphi Rody 2 ...	Interacti
1370	Chevy Cobalt X...	10/14/2010	9/26/2011	Active			Interacti

Projects Folders Example

http://localhost - Project - 1319 3D Printer Release (read only) - Mozilla Firefox

File Edit Views Search Actions Reports Tools Help

Project

Status : Active

Team Access
PJ 1319 3D Printer Release

Top Folder
Project 1

Project Number: 1319

Project Manager: Innovator Admin

Customer

Name: 3D Printer Release

From Template: APOP

Ph 1: 29 Ph 2: 0 Ph 3: 0 Ph 4: 0 Ph 5: 0

Target Start: 1/2/2014 Target Finish: 1/21/2015 Scheduling Type: Forward Scheduling Mode: Interactively Only

Scheduled Start: 1/2/2014 Scheduled Finish: 1/21/2015 Project Update Mode: Interactively Only

Description

Project Plan Team Parts **Folders**

+ - ↺ ↻ ↺ ↻ Current

Folder/Number	Pos	Files...	Status	Rev	Gen	Date	Owner	Description
- Project 1	-	-	Planning	-	-	-	Guest 2 Demo	
1000 - Project Management	-	-	Active	-	-	-	Guest 2 Demo	
2000 - Customer Requirements	-	-	Active	-	-	-	Guest 2 Demo	
2100 - Data From Customer	-	-	Active	-	-	-	Guest 2 Demo	
3000 - Product Design	-	-	Active	-	-	-	Guest 2 Demo	
Controlled Items:								
D100001	128		Preliminary	A	1	5/14/2013		Template - Design Specs short
3100 - Design Specs	-	-	Active	-	-	-	Guest 2 Demo	
3200 - Design Results	-	-	Active	-	-	-	Guest 2 Demo	Engineering

Ready

Aras Innovator

Data Model

