

# Notice of Liability

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## Item Folders

### 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

# General Overview – „Item Folders“

- Adds handling of multi-level Folder structures. (new Item Types, see data model). On top of Aras Solutions „Product Engineering“ & „Program Management“
- Each Folder can list simple attachments (files) or controlled (related) Items. like Documents or Parts (Poly Item List).
- It uses the new (9.3) Team Access features. Folder Structure will be accessible to Team members only.
- Auto copies the team access to Folder Structure (down). As new sub folders get added.
- „Folder Navigator“. Multi-Level tree grid listing folder structure and folder controlled items to navigate to.

Loads next levels on grid on demand (by reading next levels on expand event of a node, for best performance with large structures).

- Create Folder Structures from Folder Templates

Aras Innovator - Windows Internet Explorer

**aras INNOVATOR®** Wednesd

File Edit View Search Actions Reports Tools Help

Simple Search ☒ Page Size:  Max Results:  Current As Of: Today

Name	Status	Description	Files	Top	Date [...]	Number
Top*				1		
TOP FOLDR 100	Active	dd	<input type="checkbox"/>	<input checked="" type="checkbox"/>	8/17/2011 6:11:37 PM	IF00000011

Administration  
Change Management  
Dashboards  
Design  
Documents  
  CAD Documents  
  Documents  
  **Folders**  
Library  
My Innovator  
Portfolio  
Process  
Sourcing  
Templates

Folder - TOP FOLDR 100 - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Name  
TOP FOLDR 100

Description  
dd

**Folder**

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

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

**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	--	--	

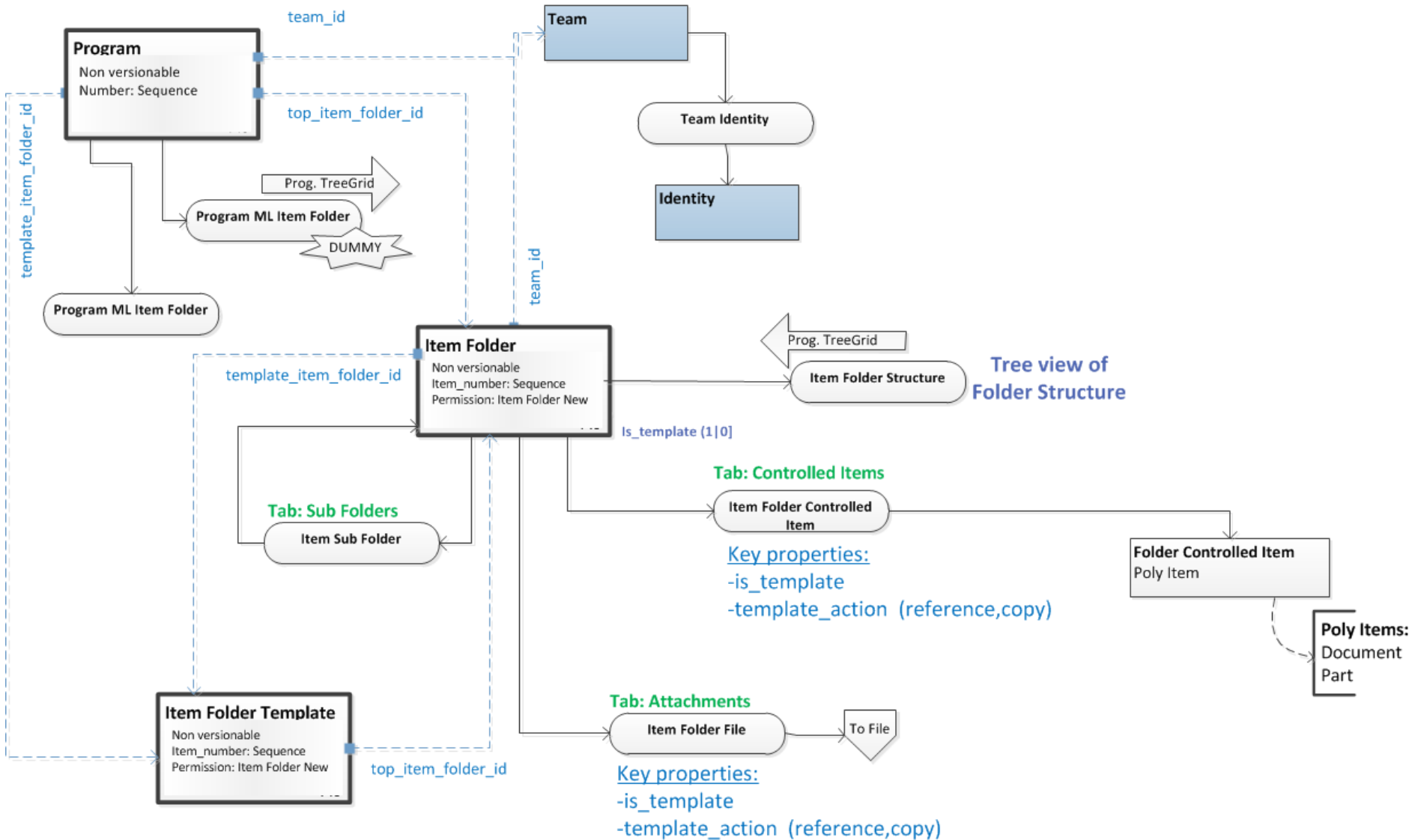
Ready aras INNOVATOR

# Installation

- Use the PackageImportExportUtilities to import the package „Item Folders vXX“
- Extract package to directory accessible to the import tool.
- Read the „READ\_ME.txt“ file provided in zip-package with more installation details.

→ You MUST use the „Merge“ option.

# Data Model



# Concepts

Step1:

Create  
New

New Folders are  
,Top' folders by default

Folder 1

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 Item  
(Document or Part)

Folder 4

Top✗

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

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

Document

„Doc1“

Team: FD\_Folder1

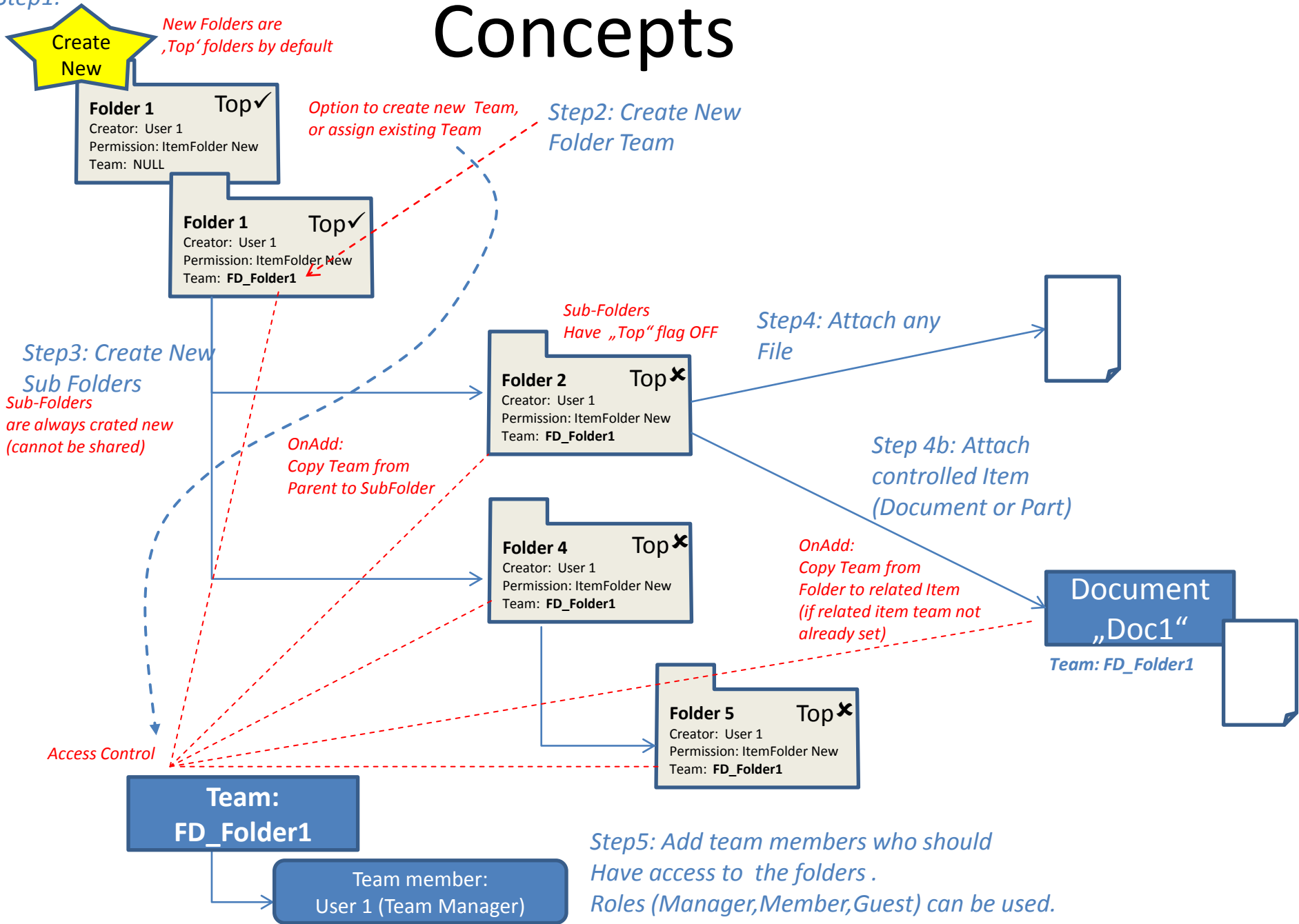
Access Control

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.



# Folder Templates

**Aras Innovator - Windows Internet Explorer**

File Edit View Search Actions Reports Tools Help

Simple Search Page Size: Max Results:

Administration  
Change Management  
Dashboards  
Design  
Documents  
Library  
My Innovator  
Portfolio  
Process  
Sourcing  
Templates  
Item Folder Templates  
Project Templates

Status	Name	Template Type
Released	SIMPLE PROJECT STRUCT	Folder Structure1
Released	PROGRAM MGMT STRUCT 1	Folder Structure1

**Item Folder Template - SIMPLE PROJECT STRUCT (read only) - Windows Internet Explorer**

File Edit Views Search Actions Reports Tools Help

Number: TEMPL1 State: Released Item Types With Auto Numbers: Document Part

Name: SIMPLE PROJECT STRUCT

Template Type: Folder Structure1 Item Folder: SIMPLE PROJECT STRUCT

**Item Folder Template**

Folders

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

**Item Folder Template - PROGRAM MGMT STRUCT 1 - Windows Internet Explorer**

File Edit Views Search Actions Reports Tools Help

Number: TEMPL2 State: New Item Types With Auto Numbers: Document Part

Name: PROGRAM MGMT STRUCT 1

Template Type: Folder Structure1 Item Folder: PROGRAM MGMT STRUCT 1

**Item Folder Template**

Folders

Name	Lck	Files	Status	Rev	Date	Description
- PROGRAM MGMT STRUCT 1		<input type="checkbox"/>	Active	--	--	
1000 - Marketing		<input checked="" type="checkbox"/>	Active	--	--	
Attachments of:1000 - Marketing		--	--	1	8/17/2011	
DTMPL-1000		<input type="checkbox"/>	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	--	--	

# New Top Folder

Aras INNOVATOR®

File Edit View Search Actions Reports Tools Help

Simple Search [ ] Page Size: [ ]

Administration  
Change Management  
Dashboards  
Design  
Documents  
CAD Documents  
Documents  
Folders

Folder - C297E478A15740769255C180D437E52F - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Name: TOP FOLDER 100

Select A Folder Template: SIMPLE PROJECT STRUC...

Description:

Folder Navigator: Sub Folders Folder Attachments Controlled Items

After first save

Folder Structure from Template

Folder

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

Name	Lock	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 assigned Teams

**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>

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

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

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

Name: from Customers

Description:

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

Top: ☐

*Sub folders get Team from parents*

**Folder Navigator**

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

# Add next level Folders on Sub Folders tab

The image consists of three overlapping screenshots of the Innovator software interface, demonstrating how to add a new folder to a subfolder.

**Top Screenshot:** Shows the 'Folder - TOP FOLDER 100 (read only) - Windows Internet Explorer' 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 - Windows Internet Explorer' 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 from the 'Designs' folder in the tree to the 'Name' field.

**Bottom Screenshot:** Shows the 'Folder - TOP FOLDER 100 (read only) - Windows Internet Explorer' 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', and '2000 - Designs'. A red arrow points from the '2000 - Designs' folder in the tree to the 'Sub Folders' tab in the 'Folder Navigator' section.

The 'Sub Folders' tab in the 'Folder Navigator' section shows a table with the following data:

Org/Group	Name	Status
2100	Specifications	Active
2200	Prototype	Active

The 'Folder Navigator' section also shows a tree structure with '1000 - Presentations', '1100 - from Customers', and '2000 - Designs'. The '2000 - Designs' folder is highlighted, and a red arrow points from it to the 'Sub Folders' tab.

The 'Folder Navigator' section also shows a tree structure with '1000 - Presentations', '1100 - from Customers', and '2000 - Designs'. The '2000 - Designs' folder is highlighted, and a red arrow points from it to the 'Sub Folders' tab.

The 'Folder Navigator' section also shows a tree structure with '1000 - Presentations', '1100 - from Customers', and '2000 - Designs'. The '2000 - Designs' folder is highlighted, and a red arrow points from it to the 'Sub Folders' tab.

# Folder Permissions

## Controlling the Team Access

The left window, titled "Folder - TOP FOLDR 100 - Windows Internet Explorer", shows a folder named "TOP FOLDR 100" with a description "dd". It has a "Team Access" link labeled "FD\_TOP FOLDR 100". The "Sub Folders" tab is selected in the "Folder Navigator". Below the tabs is a table of subfolders:

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

The right window, titled "Permission - Item Folder New (read only) - Windows Internet Explorer", shows the "Permission" settings for "Item Folder New". It has a "Name" field with "Item Folder New" and a "Permission" section. Below the "Access" tab is a table of permissions:

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"/>

A red arrow points from the "Sub Folders" tab in the left window to the "Permission" window.

Use tab „Sub Folders“ on each level to add new or to remove folders to/from the structure.

# You can use the Folder Structure on other Item Types

**Included Example:** Adds a link to Folder Structures on Program items.

new Property: „**top\_item\_folder\_id**“  
on Program item

Add new „non related“ relationship to  
Program: „**Program Folders**“  
On this relationship set GridView to Form:  
„**Item Folder Structure Grid**“

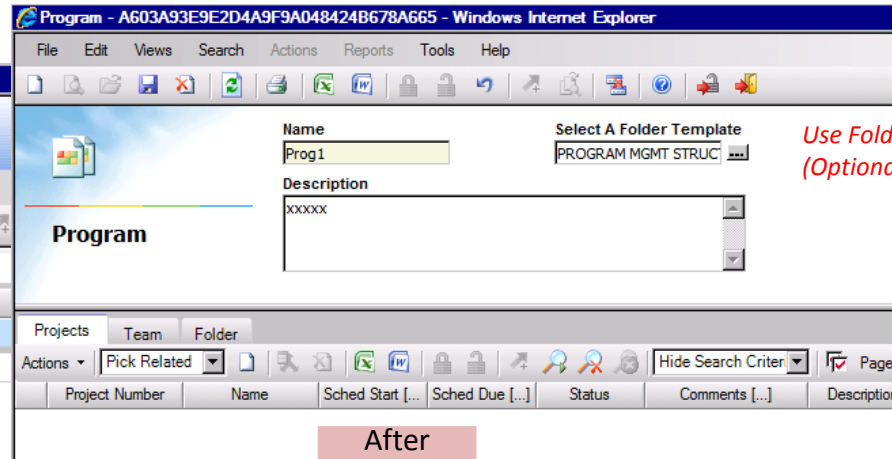
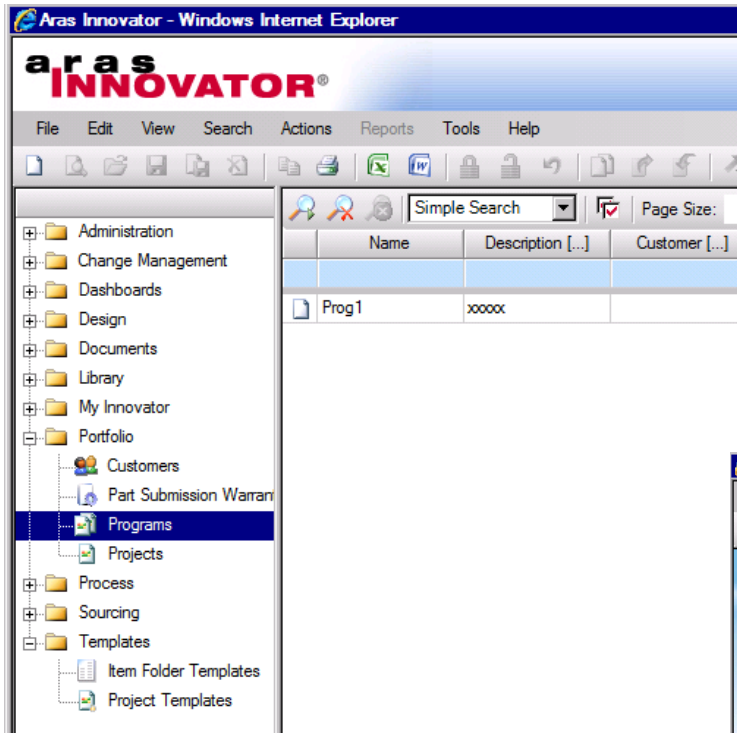
Edit method:

„ **Item Folder Struct Grid Handler**“  
and add logic for item type „Program“ to  
switch statement.

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 is a form for editing a 'Program' item, with fields for Name, Customer, Description, and a 'Related Folder' dropdown menu showing 'PROJ12345'. The bottom section is a 'Folder' structure grid, which is a table with columns: Name, Lck, Files, Description, state, effective\_date, and Pos. The grid shows a tree structure of folders under 'PROJ12345', including 'Internal Docs', 'Marketing', 'Engineering', 'Production', 'Internal Docs - Controlled Items', and 'Customer Docs'. The status bar at the bottom shows 'Ready' and '0 Items found.'.

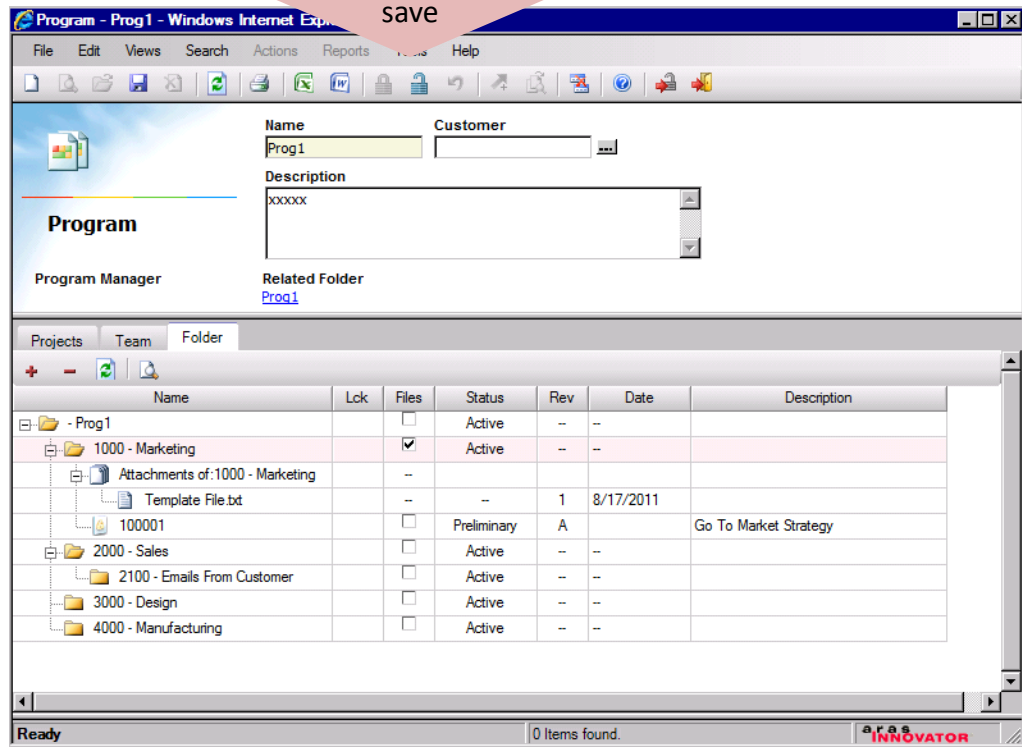
Name	Lck	Files	Description	state	effective_date	Pos
PROJ12345		<input type="checkbox"/>		--	--	
Internal Docs		<input type="checkbox"/>	PROJ12345	--	--	128
Marketing		<input type="checkbox"/>		--	--	128
Engineering		<input type="checkbox"/>		--	--	256
Production		<input type="checkbox"/>		--	--	384
Internal Docs - Controlled Items		<input type="checkbox"/>		--	--	
Customer Docs		<input type="checkbox"/>	PROJ12345	--	--	256

# New Program With Folder Structure



Use Folder Templates  
(Optional)

After  
first  
save



# Program Team Tab

Program - Prog1 - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Name: Prog1 Customer: [ ]

Description: xxxxxx

**Program**

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*

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](#) Top

Folder Navigator Sub Folders Folder Attachments Controlled Items

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	--	--	