**Quick References for Using Aras**

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| 1. **LAUNCH INTERNET EXPLORER** |  | |
| Go to the Aras training url:  http://arastest.seaspan.com/innovatortest  For Aras production server, go to:  http://aras.seaspan.com/innovatorprod | |  |
| When accessing Aras from external sources, connect to VPN or secure website (Production Server only):  <https://innovator.seaspan.com>/innovatorprod  **Questions or issues? Contact** ArasSupport@Seaspan.com | | |
| 1. **SAVE THE URL AS A BOOK MARK**   Use either the *Favourites* (star) icon to Add to Favourites  Give it a name e.g. Aras  Select Add to save the bookmark/favourite |  | |
| 1. **LOG INTO ARAS**   Use your Windows UserID and Password |  | |
| 1. **SELECT A FOLDER ON YOUR HARD DRIVE AS YOUR WORKING DIRECTORY FOR ARAS** |  | |
| 1. **NAVIGATION**   **5.1 Main Menu and Toolbar**   * Includes Microsoft style dropdown menus and access buttons * Capabilities are context sensitive   **5.2 Table of Contents TOC**   * Expandable tree type structure, used to access information within Aras   **5.3 Workspace Pane**   * Data based on the TOC selection, is displayed in the Workspace Pane   **5.4 Status Bar**   * Displays User Name, server name, database and search results | **5.2**  **5.4**  **5.3**  **5.1** | |
| 1. **TOOLBAR**   **6.1 Create**   * Creates an item   **6.2 Excel & Word button**   * Export to Excel or Word   **6.3 Lock/Unlock button**   * Lock/Unlock an item | **6.1**  **6.3**  **6.2**  FYI - An item must be LOCKED to be edited. By default, when you open an item for EDIT it is locked | |
| 1. **TABLE OF CONTENTS -TOC**   **7.1 Change Management**   * Will be used to report, track and manage changes to the product throughout its lifecycle   **7.2 Comments**   * Comment Sheets & Comments   **7.3 Design**   * Parts – (Logical); SWBS Product Hierarchy - Functional Baseline   **7.4 Documents**   * Technical and administrative documents   **7.5 My Innovator**   * Workflow assignments, saved searches and full text search | **7.1**  **7.5**  **7.4**  **7.3**  **7.2**  **2** | |
| 1. **SEARCHING**   Select Documents > Documents in the Table of Content  **8.1Simple Search**   1. Ensure Simple Search is selected in the drop-down 2. Clear search parameters with the magnifying glass with-x button 3. Type your search term in the Doc Name column 4. Select magnifying glass-with-triangle button to activate the search | **5**  **4**  **2**  **1**  **3** | |
| **Note About Searches:**   * Drag and drop columns to customize your view * Limit the number of results that you want to see on the page in the number field box (#5.) * Total items found to match your search will show at the bottom of the screen in the status bar * Wildcard Characters #, \*, % e.g.\*190\* = anything that contains hull 190, a\*b = anything that starts with an ‘a’ and ends with ‘b’ * ‘0’ or ‘1’ can be used to filter checkboxes | | |
| **8.2 ADVANCED SEARCH**   * Select Advanced Search in the drop-down * Select the magnifying glass with-plus-sign to Add Criteria * In the Property Column, click on “Authoring Tool” cell. Use the drop down arrow and select Doc Name * In the Operation column, use the drop down menu and select “like” * Type in what you are searching for in the Criteria Colum (For training, please type in \*ship\*) * Select the magnifying glass with-arrow to Search   **8.3 SAVE YOUR SEARCH**  Using Search Menu select *Save Search* and label your search.  Once your search is saved it will show in your Search Centre in My Innovator. |  | |
| **8.4 FULL TEXT SEARCH**  Using *Discover Innovator* run a ‘google’ type search and filter using dynamic pick list |  | |
| 1. **ALL VIEWS SHOW IN TEAR OFF WINDOWS**   1 - Menu & Toolbar  2 - Form Frame  3 - Relationship Tabs  The Tear off window is where you can view/edit the item information  **Important: Aras cannot initiate the lifecycle for an item until a SAVE, UNLOCK & CLOSE is performed after you have finished editing** | **1**  **2**  **3** | |
| 1. **VIEWING ITEMS**   Select Views in the menu  **10.1 Select *History***to see the detailed record of the item throughout its lifecycle  **10.2 Select *Revisions*** to see summary of previous versions and active revision(s)  **10.3 Select *Where Used*** to see items connected to the current item   * 1. **Select Workflow** to see who is assigned to which activities. * When viewing the workflow, nodes representing activities are clickable and detail who is responsible for each stage of the workflow. Alternatively, you can select the activity from the dropdown in the Activity Summary section   **10.5 Select Lifecycle** to see the state of the item | **10.11**  **10.2**  **10.3**  **10.4**  **10.5** | |

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| 1. **Creating an Item (PR)**   Select a change management item in the TOC (select PR for training purposes)  **11.1 Click Create** to create the item  **11.2 Fill out form** in tear off window  Note: All fields are optional for PRs  **11.3 Assign owner/SME** by clicking on the blue button, type in your name and search for it. Double click on your name to populate the box  For training, assign yourself as owner  **11.4 Save Unlock & Close** to kick off the workflow | **11.1**    **11.3**  **11.4** |
| 1. **MY INBASKET**   Access through My Innovator  And see the your Active and Pending Workflow Assignments  Right click an ECN number in Workflow/Project column and select *Edit ECN* to edit it |  |
| 1. **VOTING ON AN A TASK OR ACTIVITY**   Access voting through Views/Workflow/ Workflow Process  Voting moves the task to the next owner or to the next activity in the workflow  Check the task(s) to show it is complete - if required  Select a Vote from drop down list  Select Complete to submit vote. Include your Aras password if needed |  |
| 1. **DESIGN - PARTS**   **See the SWBS Relationships**  12.1 Go to “Parts” under “Design” TOC  12.2 Type in “OFSV” in the blue bar under “Part Number”  12.3 Click the Search Green Arrow  12.4 Right click, select “Structure Browser” in the menu that comes up | **12.2**  **12.3**  **12.1**    **12.4** |