

ACE 2024

STUDENT TRAINING GUIDE

# What's New in Aras Innovator R14-R29



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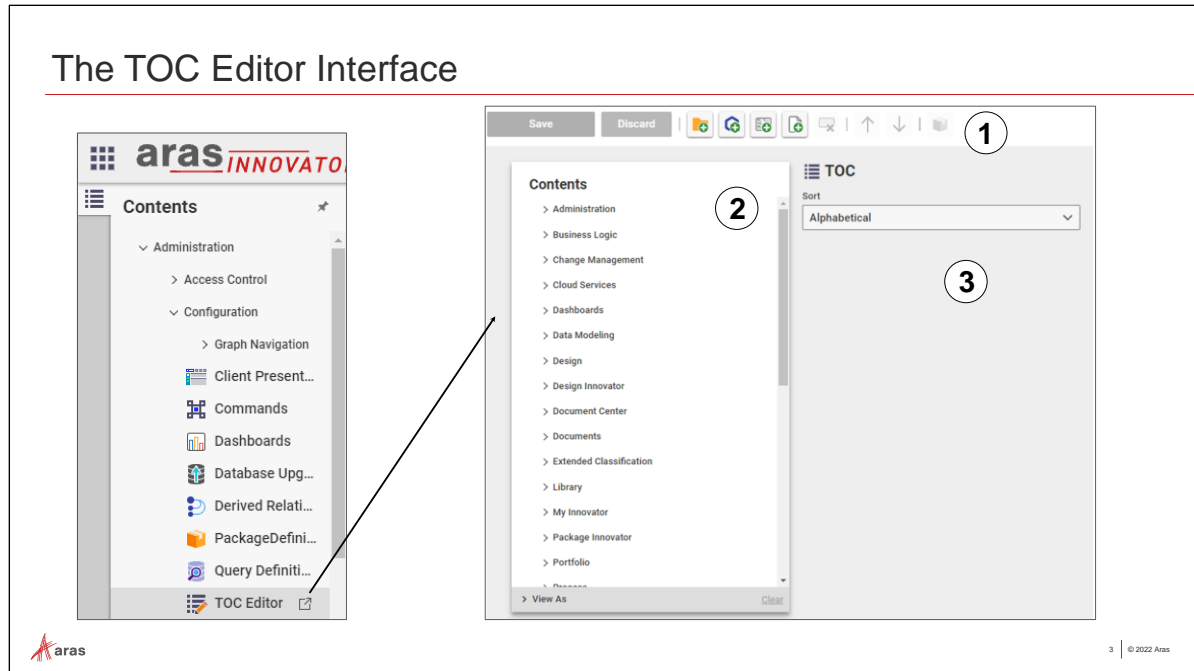
# What's New in Aras Innovator R14-R29

## Overview

Aras has added many key enhancements to the functionality of Aras Innovator since upgrading from the Aras Innovator 12 platform. In this unit, we will explore how some of the new features work.

## Objectives

- New TOC Editor
- TOC Button Custom View Configuration
- TOC Editor Localized Content
- Configure Single Items as TOC Entries
- Copy Item Keyed Name and Hyperlink from Title Bar
- Claim Independent of Edit
- Improved Export to Excel
- Federated Properties
- Grid Layouts Included with Favorite Searches
- Set Tabs as Login View
- Copy Grid Cell to Clipboard
- Tooltips for Properties in Grids and Forms
- Dashboards with Widgets
- Widget Types
- Widget Templates



## Introduction to the TOC Editor

The TOC Editor provides a graphical interface to view and configure the content of the TOC, simplifying the process of editing the TOC. Now, administrators can see and configure the entire TOC without opening each individual ItemType. The TOC Editor allows you to see all categories, including all nested categories and their ItemTypes. It allows you create categories, pick icons for each category, assign labels to each one, associate ItemTypes with categories, move categories, and preview the TOC as a specific user. The TOC Editor offers several benefits to Aras Innovator Administrators and developers:

- **Reduced Context Switching:** Administrators can configure all TOC content in a single interface. No need to switch between tabs and edit individual ItemTypes. This is a change from previously using the TOC Access relationship tab on each ItemType.
- **Improved Visibility:** Administrators can instantly see the results of their edits without logging out and logging back into Aras Innovator. The "View As" functionality enables administrators to see the TOC view for different users and groups, making it easier to test and troubleshoot their configuration changes.
- **Simplified Packaging:** The TOC Editor automatically packages the CUI objects that are used to render the TOC controls.


### The TOC Editor Interface

The TOC Editor is accessed from the Administration > Configuration category of the TOC. It is comprised of three main sections: the Toolbar, the Contents pane, and the Details pane.

①	The TOC Editor Toolbar	Contains the controls for editing the TOC.
②	The Contents pane	Displays all Categories and ItemType buttons that are configured in the Aras Innovator database.
③	The Details pane	Displays a form for viewing and editing the properties of the selected row in the Contents Pane.

## The TOC Editor Toolbar

1. Save
2. Discard
3. Add Category
4. Add ItemType
5. Add Item
6. Add Form
7. Add Page
8. Delete
9. Move Up
10. Move Down
11. Add to Package Definition

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### The TOC Editor Toolbar

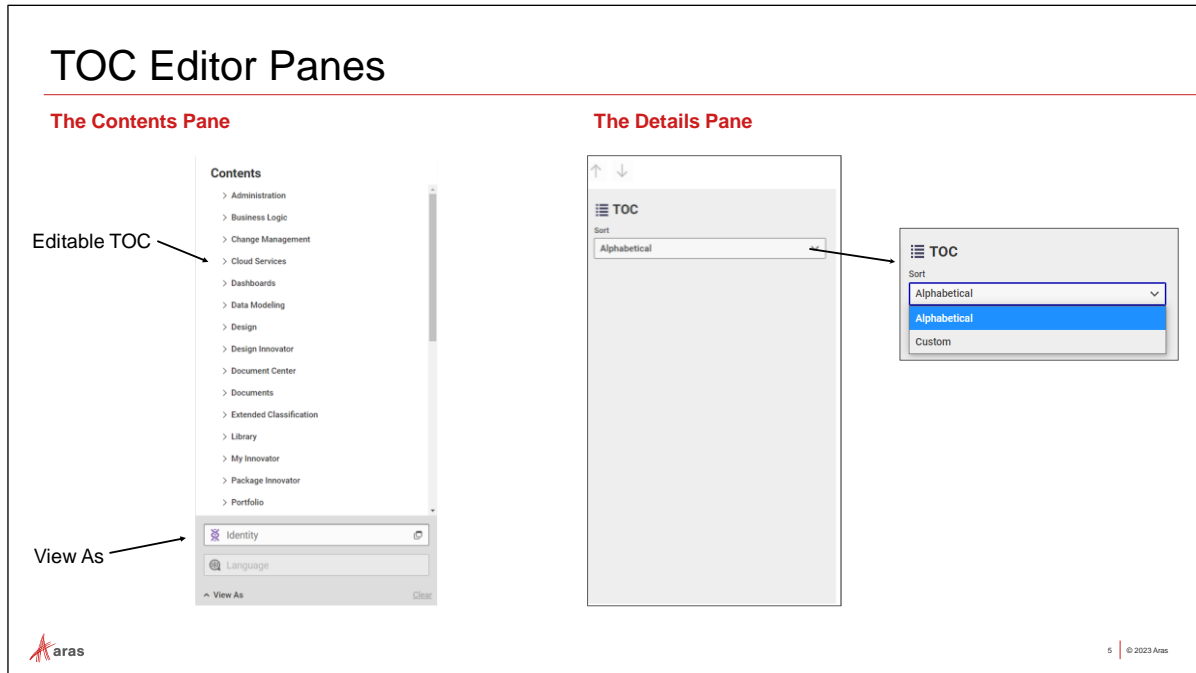
The TOC Editor toolbar contains the following controls:

<b>Save</b>	Saves the current changes in the editor. If the editor tab is closed before the user clicks Save, all changes made since the last save will be lost. This button is disabled if there are no changes in the editor.
<b>Discard</b>	Discards the current changes in the editor.
<b>Add Category</b>	Adds a new Category to the TOC. If another Category is selected when this button is clicked, the new Category will be created as a child of the selected Category. If no Category is selected, the new Category will be created at the bottom of the TOC.
<b>Add ItemType</b>	Adds a new ItemType button to the TOC. If a Category is selected when this button is clicked, the new ItemType button is created as a child of the selected Category. If no Category is selected, the new ItemType button is created at the bottom of the TOC.
<b>Add Item</b>	Adds a single item to the TOC
<b>Add Form</b>	Allows an admin to configure a form to display when a TOC button is clicked, avoiding the need to directly edit the CUI data for the TOC. Setting a TOC form in the TOC Editor will configure the CUI as necessary.
<b>Add Page</b>	Allows an admin to configure an HTML page to display when a TOC button is clicked, avoiding the need to directly edit the CUI data for the TOC. Setting a TOC page in the TOC Editor will configure the CUI as necessary.
<b>Delete</b>	Deletes the currently selected Category or ItemType. If a Category includes ItemTypes, and the Category is deleted, the ItemType buttons remain in the TOC.

<b>Move Up</b>	Moves the selected Category or ItemType button within its parent Category. This button is disabled if the selected Category or ItemType button cannot be moved higher.
<b>Move Down</b>	Moves the selected Category or ItemType button within its parent Category. This button is disabled if the selected Category or ItemType button cannot be moved lower.
<b>Add to Package Definition</b>	Add a newly created category or dashboard item to a Package Definition

### Try it ... Launch the TOC Editor

1. Login to Aras Innovator as the user Innovator Admin (Username = *admin*, PW = *innovator*).
2. Navigate to TOC > Administration > Configuration and click on the TOC Editor.
3. The TOC Editor Form will open in its own tab.
4. To select an existing parent category, click on it and the right pane will become an item specific pane. Locate and expand the Documents parent category.
5. Expand and select an item specific category by clicking on the Documents category. Notice the specific settings in the item specific pane.



## The Contents Pane

The pane on the left side of the TOC Editor displays all Categories and ItemType buttons that are configured in the Aras Innovator database.

Use the View As filters at the bottom of the Contents Pane to preview the TOC configuration for a specified user, group identity, or language. The TOC Editor enters a read-only mode when the View As filter is active. Use Clear to return to Edit mode.

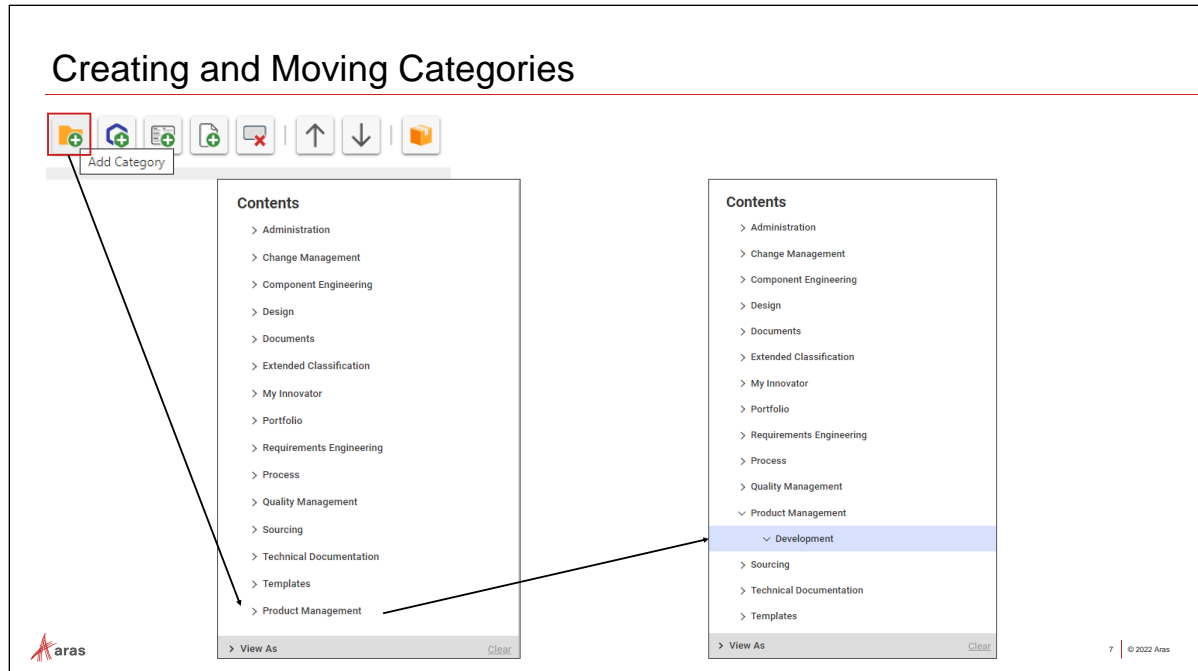
## The Details Pane

The Details pane displays a form for viewing and editing the properties of the selected row in the Contents Pane. When no items are selected in the Contents Pane, the Details Pane shows general properties for the TOC. This is the default view when the TOC Editor opens.

When no items are selected in the Contents Pane, the Details Pane shows general properties for the TOC. This is the default view when the TOC Editor opens. To deselect an item in the Contents Pane and show the TOC properties, click the Contents header in the Contents Pane.

**Sort** determines the order that the Aras Innovator web client renders the TOC elements. The Contents Pane always displays the Custom Sort view if one has been created. Therefore, the actual TOC may appear different from the Contents pane when the Sort property is set to Alphabetical.

- **Alphabetical:** The default setting is Alphabetical, which sorts TOC Categories and their child items in alphabetical order. This setting is consistent with the behavior of Aras Innovator 12 and earlier releases.
- **Custom:** This setting sorts the TOC Categories and ItemTypes according to the order defined in the TOC Editor.



## Creating and Moving Categories

If no Category is selected when a new Category is created, the new Category is created at the bottom of the TOC. However, if an existing Category is selected when the Add Category button is clicked, the new Category is created as a child of the selected Category. To move a category, either click on it and drag it into position or click on it and use the Move Up and Move Down buttons to move it.

### Try it ... Create a Category

1. The TOC Editor tab should be open from the previous exercise.
2. Do not select an existing category. If you already clicked on a category, click on **Contents** at the top of the Contents Pane to remove the category selection.
3. Click the Add Category button and enter *Product Management* for the Label.
4. Click Save.

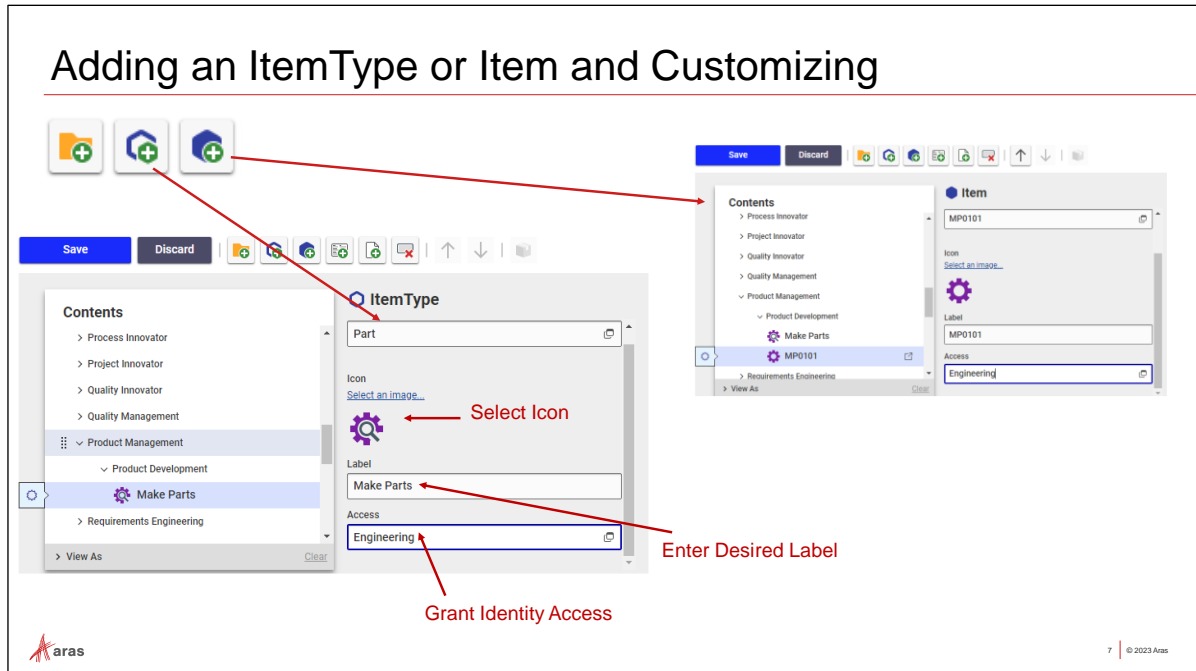
### Try it ... Move a Category

1. Click to select the new Product Management Category
2. Move the Product Management Category to your desired location by using the up/down arrows in toolbar or holding and dragging to a new position.
3. Click Save when in desired position.

### Try it ... Create a Child Category

1. Click on the Product Management Category and click the Add Category button.
2. In the Label field, enter *Product Development* and click Save.





## Adding an ItemType or Item and Customizing

The Add ItemType button positions an ItemType to the TOC in the selected category. If a Category is selected when this button is clicked, the new ItemType button is created as a child of the selected Category. If no Category is selected, the new ItemType button is created at the bottom of the TOC.

### Customizing ItemType buttons in the TOC

With an ItemType button selected in the Contents pane, the following items can be edited:

- **ItemType:** Sets the ItemType associated with the button. When the user selects the button in the TOC, the Navigation Pane will display the user's favorite searches, favorite items, and common actions for that ItemType.
- **Icon:** Defines the icon that appears on the button in the TOC.
- **Label:** This multilingual property defines the text that is shown on the button in the TOC.
- **Access:** Defines which identities see this button in the TOC.

Note that each button can only be configured for a single Identity. To display an ItemType in the TOC for multiple Identities, either create a separate button for each Identity or use a group Identity that encompasses all individuals or groups who should see that ItemType in the TOC.

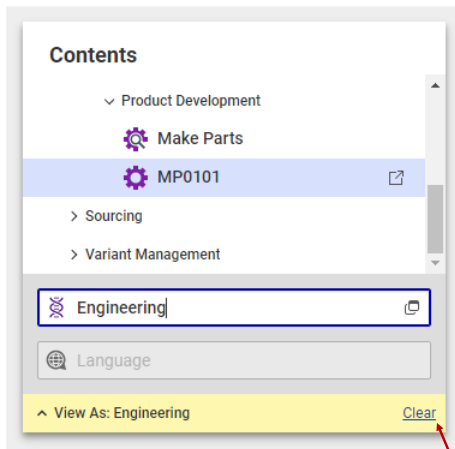
### Try it ... Customize an ItemType button in the TOC

We will add Parts and a single part to the new category for members of the Engineering identity.

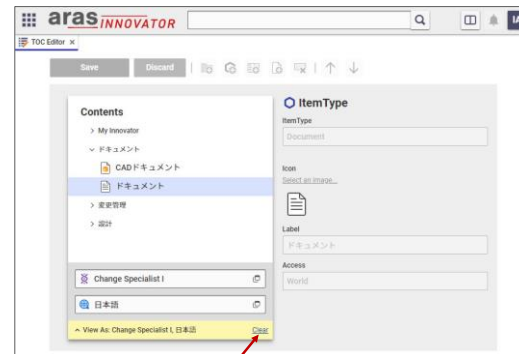
1. In the TOC Editor, select the Product Development Category and using the Add ItemType button, search and add the **Part** ItemType.
2. Change the Label to *Make Parts* and if desired, change the icon.
3. Change the Access field's value to *Engineering* and Save.
4. To add a single part item, click the Add Item button, select Part, and click OK to search and find MP0101. Click OK and edit the Details pane.
5. Change the Access field's value to *Engineering* and Save the changes.

## Using View As

### Preview as an Identity



### Preview Multilingual



Reset to Administrator View

## Using View As

The TOC Editor's View As feature allows you to quickly see how changes to the TOC impact different Identities without having to log out and back in. The View As filters also allow an administrator to preview the TOC configuration in another language. After the Administrator chooses a language configured in the database, the TOC Editor content will refresh and display the multilingual values stored for that language. The TOC Editor enters a read-only mode when the View As filter is active.

### Try it ... View the TOC using the Engineering Identity

1. At the bottom of the Contents pane, click View As.
2. Use type ahead in the Identity field or click the Select items button.
3. In the Select Items window, search for and select the **Engineering** Identity.
4. The TOC pane will refresh to show how members of Engineering will see their newly configured TOC on their next login.
5. Click Clear to return to Edit mode.
6. Launch a different browser window and login as a member of Engineering Identity to see the additional categories on the TOC. (Username = *mmiller*, PW = *innovator*)

Note: This database has not been localized to support other languages.

## Claim Independent of Edit

- Edit and Claim commands now function independently
  - Edit does not initiate Claim
  - Done Editing does not Unclaim
- Both Edit and Claim will set the item as locked in the database

Status	PREVIOUSLY		NOW	
	User With Lock Sees	Other Users See	User With Lock Sees	Other Users See
Claimed				
Edit Mode	Not Possible		Edit Mode styling on inputs	
Edit Mode + Claimed	+ Edit Mode styling on inputs		+ Edit Mode styling on inputs	
Edit Mode + Modified	Not Possible		+ Edit Mode styling on inputs	
Edit Mode + Claimed + Modified	+ Edit Mode styling on inputs		+ Edit Mode styling on inputs	

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### Claim an Item

Claiming reserves an item for you to edit later and prevents any other user from opening it for Edit. You can claim the item from the search grid without opening the item in edit mode.

The Claim flag can be selected before or after you enter Edit Mode. Clicking Done, without selecting Claim, saves all changes, ends edit mode, and releases the claim (unlocks the item). Clicking Done with Claim selected, saves all changes, ends edit mode, but retains the claim (item remains locked).

Users can keep items claimed across multiple cycles of editing. Users can prevent unnecessary automatic versions by keeping an item claimed while making edits, preserving the business meaning of versions.

When items are claimed by other users, you can now see which user has claimed the item by hovering over the red claim flag.

The Claim status is searchable by using one of the following options:

**Claimed By Me** filters for all items that you have claimed.

**Claimed By Others** filters for all items that other users have claimed.

**Claimed By Anyone** shows all claimed items.

**Claimed By Me, Edit Mode and Modified** filters for items that you have claimed, are currently in Edit Mode, and have changes that have not been saved.

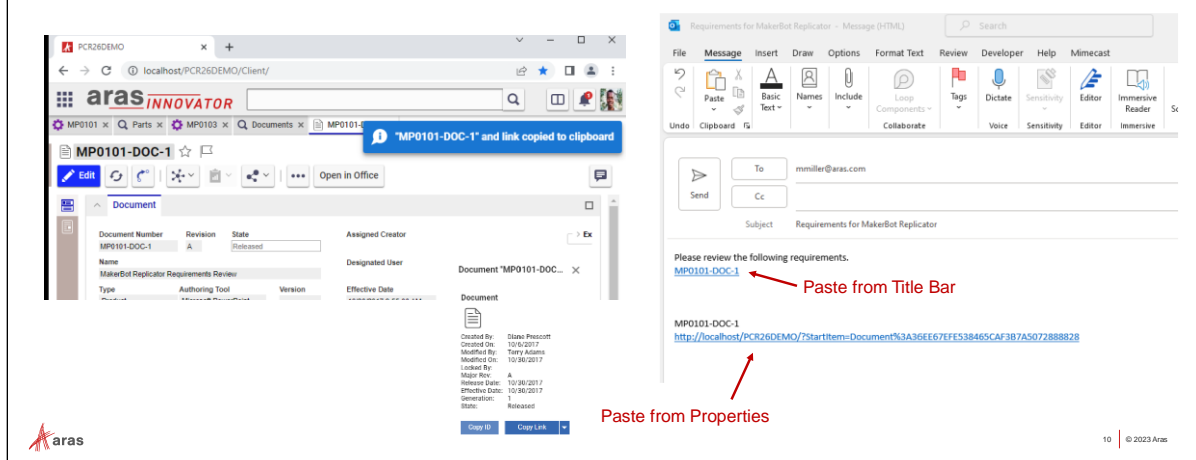
**Edit Mode and Modified** filters for items you have in Edit Mode and have changes that have not been saved.

### Try it ... Claim and Edit Items

1. Navigate to Design > Parts in the TOC and search to find parts in the Preliminary state.
2. Claim a part, open and click Edit.
3. Make some changes and click Done. Notice, the part is still claimed.
4. Login in a separate browser window as a different user.
5. Search to find the item claimed above. Hover over the claim flag to see the user's name.

## Copy Item Keyed Name and Hyperlink from Title Bar

- Clicking the keyed name in the title bar of an Item View copies the keyed name text with embedded hyperlink to the clipboard



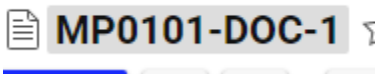
## Copy Item Keyed Name and Hyperlink from Title Bar

Users can easily create links to items in Aras Innovator, which can be sent via email or chat

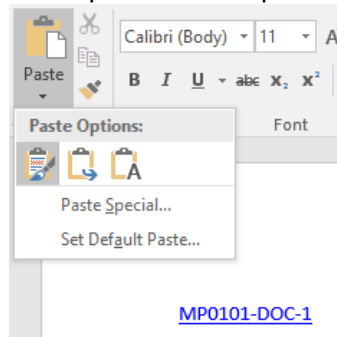
The item keyed name is directly readable, and clicking on the link opens the item in Aras, assuming the user has access to the same environment

### Try it ... Copy Item Keyed Name and Hyperlink from Title Bar

- Navigate to the Documents > Documents category in the TOC.
- Search and open one of the document items.
- Click on the name of the document in the Item header area.



- Wait for the success message that item and link was copied to the clipboard
- Launch Microsoft Word and select to create a Blank document
- Paste Special and Keep Source Formatting



## Improved Export to Excel

- .xlsx file format is used for exports from search grids, relationships, tree grid views, and item views
- Text alignment from the web client is preserved in the export
- Formatting is updated

### New Appearance

Part Number	Revision	Name	Type	State	Cost	Changes
MP0102	A	Cover Option for MakerBot Replicator	Assembly	Preliminary	38.495	true
MP0138	A	Type K Thermocouple	Component	Released	22.1	false
MP0190	A	M3 Washer	Component	Released	0.02	false
MP0429	A	Ceramic Tape	Component	Released	1.5	false
MP0546	A	M6 Nut Thin	Component	Released	0.04	false
MP0977	C	Thingomatic Idler Pulley	Component	Released	13.88	false
MP0979	D	Mechanical Endstop	Component	Released	1.8	false
MP1531	C	ABS Black 1kg Spool 1.75mm	Component	Released	18	false
MP1532	B	ABS Natural 1kg Spool 1.75mm	Component	Released	18	false
MP1606	B	Motor Wiring Harness 42inch	Component	Released	21.5	false

### Old Appearance

Part Number	Revision	Name	Type	State	Cost	Changes
MP0102	A	Cover Option for MakerBot Replicator	Assembly	Preliminary	38.495	true
MP0138	A	Type K Thermocouple	Component	Released	22.1	false
MP0190	A	M3 Washer	Component	Released	0.02	false
MP0429	A	Ceramic Tape	Component	Released	1.5	false
MP0546	A	M6 Nut Thin	Component	Released	0.04	false
MP0977	C	Thingomatic Idler Pulley	Component	Released	13.88	false
MP0979	D	Mechanical Endstop	Component	Released	1.8	false
MP1531	C	ABS Black 1kg Spool 1.75mm	Component	Released	18	false
MP1532	B	ABS Natural 1kg Spool 1.75mm	Component	Released	18	false
MP1606	B	Motor Wiring Harness 42inch	Component	Released	21.5	false



## Improved Export to Excel

Microsoft's .xlsx file format is now used for exports from search grids, relationships, tree grid views, and item views. Text alignment from the web client is preserved in the export. Any Booleans are set to True or False in the exported file.

### Benefits

- No warning message is displayed when opening exported files in Excel.
- .XLSX file format is expected by users.
- Appearance in Excel more closely matches the appearance of Aras Innovator.
- Users can work with exported excel files more quickly and seamlessly.

### Try it ... Export to Excel

1. Navigate to the Design > Parts category in the TOC.
2. Conduct a simple search and look for all items with part number beginning with MP\* and that are currently being managed by an active ECO.
3. Hide or Move columns as desired.
4. Select Share > Export to Excel.
5. The contents will be downloaded to the folder specified in the browser settings.
6. Open the file using Excel to see correct placement of columns.

## Establish User Preferences

### Grid Layouts Included with Favorite Searches

Searches created by Administrators and Shared with other Users.

Individual User Selection

### Set Tabs as Login View



## Establish User Preferences

Administrators and Individual users can now choose to store the layout of a search grid as part of their preferred returned results window display.

### Grid Layouts Included with Favorite Searches

Users are now prompted to determine if they want to save the current layout of a grid when saving a favorite search.

### Set Tabs as Login View

The new user preference setting "Set Tabs as Login View" will remember the current set of tabs, and automatically open them when the user logs in again. This includes the Splitscreen configuration and which tabs are active.

Any dashboards that the user frequently accesses can also open immediately upon login.

### Try it ... Establish User Preferences

1. Manipulate a search grid for any category. Click on the Favorite Search button and set include current layout to True.
2. Close tabs. Initiate a new search of that category and select saved search from the favorites list.
3. Verify that the saved layout now appears.
4. Open a number of items in tabs.
5. Set a Splitscreen and choose which tabs are docked on each side.
6. Select Set Tabs as Login View from user preference menu.
7. Logout and login again to see the tabs open from last session.

## Additional Enhancements

- Copy Grid Cell to Clipboard (Ctrl-C)
- Tooltips for Properties in Grids and Forms
- Properties Panel and Properties Dialog now properly displays the label 'Claimed By'
- Indicator added to older versions of items to alert that newer versions exist.

Name ↑	Label	Data Type	Data Source [...]	Help Text [...]	Tooltip
authoring_tool	Authoring Tool	List	Authoring Tools	Original File Type	Native App

### Additional Enhancements

To improve some of the standard user interactions, features have been added to common, frequent operations.

#### Copy Grid Cell to Clipboard

Data in any grid cell (main search, modal search, relationship, or tree grid view) can be copied to the operating system clipboard by selecting the cell and using Ctrl+C keyboard shortcut.

#### Tooltips for Properties in Grids and Forms

The standard attributes "Tooltip" and "Help Text" of ItemType Properties may be configured to display contextual help information for properties displayed as grid columns and form fields. Setting a value for "Tooltip" will display a "?" icon beside the column/field label. Hovering the cursor will display the tooltip value. Setting a value for "Help Text" will add a "Show More" link inside the tooltip which, when clicked, will display a dialog window for longer text descriptions.

#### Properties Pane

Older versions of Aras Innovator used a combination of Lock and Unlock to show when edits were being made or when an item was available for editing. The label for "Locked By" in the properties pane has now been updated to show "Claimed By" to conform to new claimability feature.

#### Older Version Indicator

An indicator has been added to alert users of non-current Item versions. This helps to avoid reviewing out-of-date information. A link next to the indicator is provided to open the current Item version in a separate tab.

#### Try it ... See New Enhancements

1. Execute Search in any grid. Click to select a cell. Use Ctrl-C to copy and paste in a new location.
2. Claim an Item and then select More > Properties to open the Properties Dialog and see the updated label.
3. Open previous generation of an item to see the new indicator and a link to open current version.

## Federated Properties

- The Federated data type for property definitions has been removed and replaced with a new Federated Boolean attribute on property types
- All existing Federated properties have been converted to federated text properties
- Federated properties can now be created with specific data types for Text, Integer, Float, Decimal, String, Boolean, and Date properties

The screenshot shows the 'Properties' table in the Aras Innovator interface. The table lists various property types with columns for Name, Label, Data Type, and several checkboxes for federated attributes. The 'federated\_boolean' row is highlighted in yellow.

Name ↑	Label	Data Type	Data Source [..]	Le...	Pr...	Sc...	Req...	Uni...	Inde...	Fed...	Hid...	Hid...	Align...	Width	Sort ...
federated_integer	Federated Integer	Integer					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Left		
federated_float	Federated Float	Float					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Left		
federated_decimal	Federated Decimal	Decimal					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Left		
federated_string	Federated String	String					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Left		
federated_boolean	Federated Boolean	Boolean					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Left		
federated_text	Federated Text	Text					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Left		
federated_date	Federated Date	Date					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Left		

## Federated Properties

Data marked as federated is not stored in the Aras Innovator Database. Instead, it is accessed from an external system. Reading and managing values of federated properties requires programming. Federated Properties do not have a column in the Aras Innovator database, but the definition of such properties is stored in a row in the Property table. The Federated data type is no longer available and there is a Boolean that is set to True for properties that will be set programmatically.

Please note that not every data type is supported for federated properties.

### Benefits

Typed federated properties will support the enforcement of type specific behavior and validations.

### Try it ... Investigate ItemTypes with Federated Properties

1. Logged in as admin, navigate to the Administration > ItemTypes category in the TOC to run a Search.
2. Conduct an Advanced search and look for all items with Federated property set to True.

The screenshot shows the 'ItemTypes' search results in the Aras Innovator interface. The search criteria are set to 'Federated' and the results show a list of item types with their properties and federated status.

Item Type	Property	Operation	Criteria[...]
Item Type/Relationships/Property	Federated	=	<input checked="" type="checkbox"/>

Name ↑	Singular Label	Plural Label	Version...	Depend...	Relatio...	C..	Use Src A...	D
Affected Item	Affected Item	Affected Items	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CAD	CAD Document	CAD Documents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
ES_Component	ES Component	ES Components	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
ES_Error	ES Error	ES Errors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
ES_IndexedPrope...	Indexed Property	Indexed Properties	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

3. Open any of the ItemTypes and view the Property tab to see the new way of defining Federated properties.



## Dashboard Permissions

### Dashboard

Two Permissions Sets exist

- Dashboard

Name	Get	Upd...	Dele...	Can Discover	Show Permis...	Can change a...
World	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Creator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- Dashboard Widget Template

Name	Get	Upd...	Dele...	Can Discover	Show Permis...	Can change a...
Dashboard Authors	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dashboard Adm...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Dashboard Viewers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Dashboard Widget Template

Three Group Identities

- Dashboard Administrators
- Dashboard Authors
- Dashboard Viewers
- Identities should be edited and include other identities based upon desired outcome for engaging with Dashboards
- Only Dashboard Administrators can build Widgets
- Dashboard Authors and Viewers can use Widgets built by Dashboard Administrators



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## Dashboard Permissions

Dashboard permissions allow Users to access, view, and modify Dashboard content. The default permissions for Aras Dashboards include three group identities, such as Dashboard Authors, Dashboard Administrators, and Dashboard Viewers.

**Dashboard Administrators** can configure all Dashboard Features, as well as create, edit, and delete Dashboards and Interactive Widgets. Dashboard User permissions are managed by Dashboard Administrators.

**Dashboard Authors** can view and create Dashboards. However, Dashboard Authors can only edit and delete Dashboards they create. Dashboard Authors can only view widget templates. Dashboard Administrators can create and edit Widget Templates.

**Dashboard Viewers** can only view Dashboards.

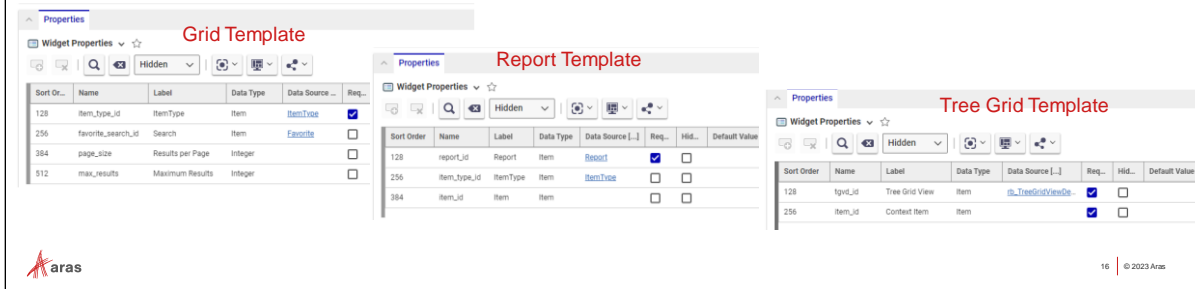
NOTE: Users who are not added to one of these three identities do not have access to Dashboards. However, the permissions can be customized, and/or a specific Dashboard can be created with a private permission that overrides the default permission model.

### Try it ... Add Identities to the Dashboard Group Identities

1. Login as a member of the Administrators group. (Username = admin, PW = innovator)
2. Navigate in the TOC to select and Search the Identities category.
3. Filter by using a wildcard in the Name field, enter "Dashboard\*" and execute Search.
4. Add the *Engineering* group identity to the Dashboard Authors group.
5. Add other members to the Dashboard Viewers group.
6. Login in a separate browser or a private window as the new user to see the options available.
7. Navigate to My Innovator > Dashboards to search and find a previously created and shared dashboard or create a new one if permissions allow.

## Widget Templates

- Three Templates are built as Defaults
- Use “Save As” to Create Similar Custom Widget Templates
- Properties exist for the different template types
- Properties are displayed on the Widget Settings page on the Dashboard
- Users can choose to display/hide specific fields when creating Dashboards



## Widget Types

Widget Types determine how the content of a widget is displayed. Different Widget Types will require different properties to correctly render the UI controls.

The default Widget Types provided with the Aras Innovator platform, as well as their required or optional properties.

**Grid Widget** displays search results within Aras Innovator. It is used to display data from the ItemType with related Items.

**Tree Grid Widget** displays existing Tree Grid Views associated with the Query Definition within Aras Innovator such as BOM Structures, CAD Structures, and Project Lists.

**Report Widget** displays existing reports created within Aras Innovator.

## Widget Templates

A Widget Template is a reusable template that describes details like a widget’s name, label, type, and icon. The template also defines the properties that control a widget’s content and behavior. These properties can be preset by a dashboard administrator, or they can be entered by a dashboard’s user.

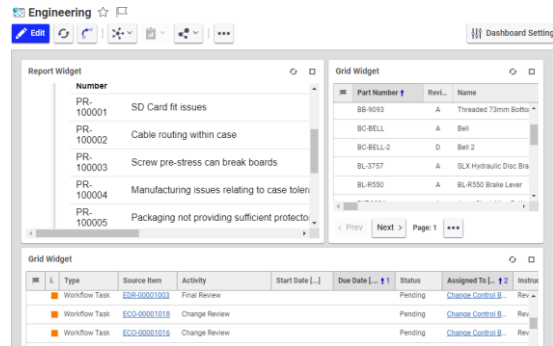
## Widget Settings

The following fields may have values defined when creating or editing Widget Templates. (  Optional,  Required)

Widget Settings	Label	Icon	Width & Height	ItemType	Search	Results per Page	Maximum Results	Report	Tree Grid View	Context Item
Grid	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tree Grid	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Dashboards and Widgets

- Dashboard Administrators can create Widget Templates with a default Favorite Search
- Dashboard Administrators can use autocomplete or a Search dialog to select an item as the default value of a Widget Template Property
- Users with the appropriate permissions can layout their own dashboards, taking advantage of using widgets defined by Dashboard Administrators



## Dashboards and Widgets

Aras Dashboards provide configurable views that can be populated with interactive widgets for displaying and navigating data. Dashboards are a low-code feature, meaning that users are not required to have coding skills or admin experience to build or use dashboards.

A Dashboard item defines the name, description, and column configuration of a Dashboard. All Widgets shown in a Dashboard are related to this root item.

Users can configure dashboard settings, view the dashboard content, and edit widget settings all from the dashboard item.

### Try it ... Create a Dashboard to Share with Users

1. Navigate in the TOC to My Innovator > Dashboards category.
2. Select Create a new Dashboard. (Must be a member of either Dashboard Administrators or Authors to be able to create a new dashboard)
3. Enter *Engineering* for the name and add a description. Click Save.
4. Click the View Dashboard button.
5. Click the Add Widget button to launch the Select Widget Templates dialog. Select the Grid Template.
6. Click the pencil button (Edit) to define the Widget Settings by selecting the Part ItemType. If you desire, add a Saved Search and define Maximum and Results per Page settings. Click OK.
7. Add more Widgets as desired using some of the existing reports or Tree Grid Views.
8. Click Done.
9. Navigate to My Innovator > Dashboards to search and find a previously created and shared dashboard or create a new one if permissions allow.

## Summary

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- New TOC Editor
- TOC Button Custom View Configuration
- TOC Editor Localized Content
- Configure Single Items as TOC Entries
- Copy Item Keyed Name and Hyperlink from Title Bar
- Claim Independent of Edit
- Improved Export to Excel
- Federated Properties
- Grid Layouts Included with Favorite Searches
- Set Tabs as Login View
- Copy Grid Cell to Clipboard
- Tooltips for Properties in Grids and Forms
- Dashboards with Widgets
- Widget Types
- Widget Templates



## Summary

Thank you for participating in this short session showcasing some of the newest features added or enhanced on the Aras Innovator R14+ platform.

For more information, please refer to the release notes found on the main Aras website for each release of Aras Innovator.