aras community event

2010 International Conference

Packaging Workshop

Peter Schroer

www.aras.com

Hosted by:

MOTOROLA

1295 E. Algonquin Road
Schaumburg, IL 60196

Copyright © 2010 Aras All Rights Reserved.

Welcome

Workshop Goals

- Understand what Packaging is and how it works
- Share some Best Practices approaches

Copyright © 2010 Aras All Rights Reserved.

Agenda

1. Background Information: Customizing Processes
2. What is Packaging
3. Packaging Process
4. Reasons for Packaging
5. Best Practices Hints
6. Trouble-Shooting
7. Aras Community Projects Web Site
8. Additional Resources

Copyright © 2010 Aras All Rights Reserved.

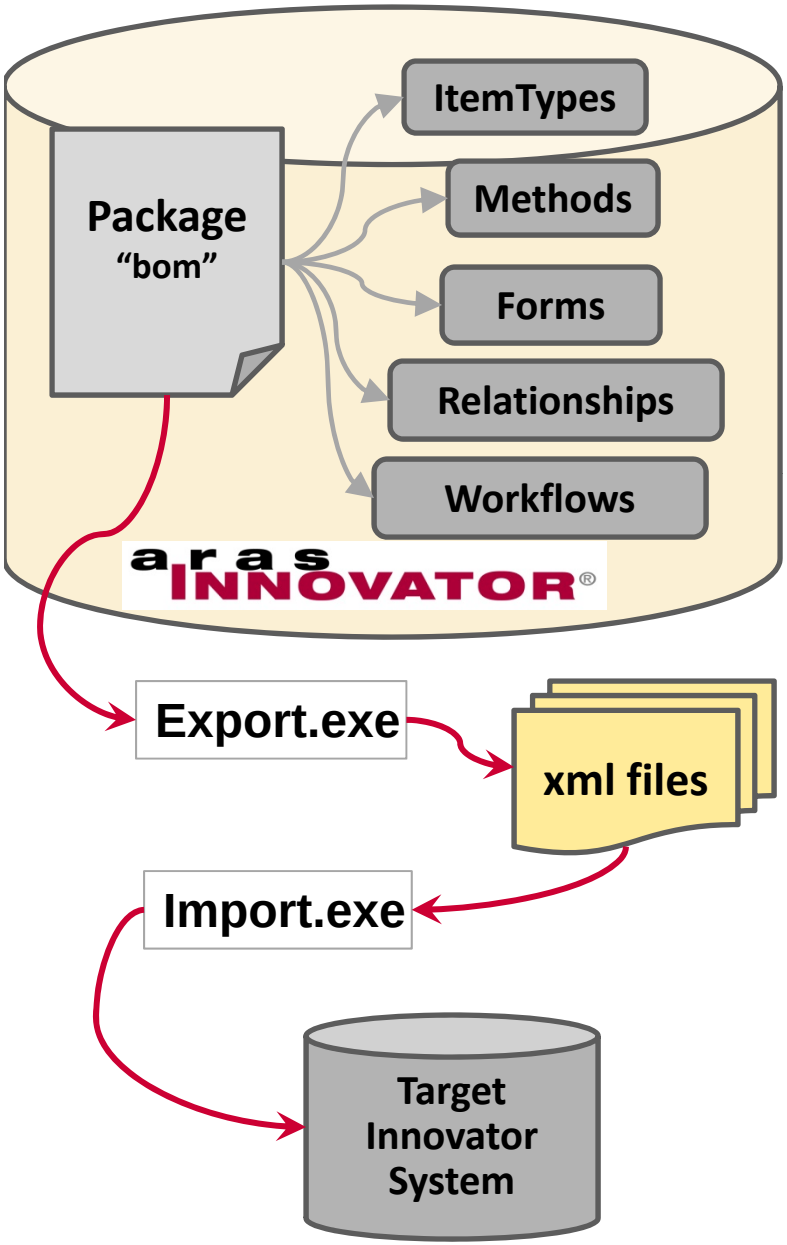
Customizing Aras Innovator

- Creating and modifying business objects: ItemTypes
- Designing user interfaces: Forms
- Customizing process models: Lifecycle and Workflows
- Programming and Scripting: Methods

- Use the Aras Innovator client for all customizing
  - But remember the Client is only sending AML transactions that are updating the Server's running AML Model
  - All customizations are stored in the database and managed as AML

Copyright © 2010 Aras All Rights Reserved.

What is Packaging?

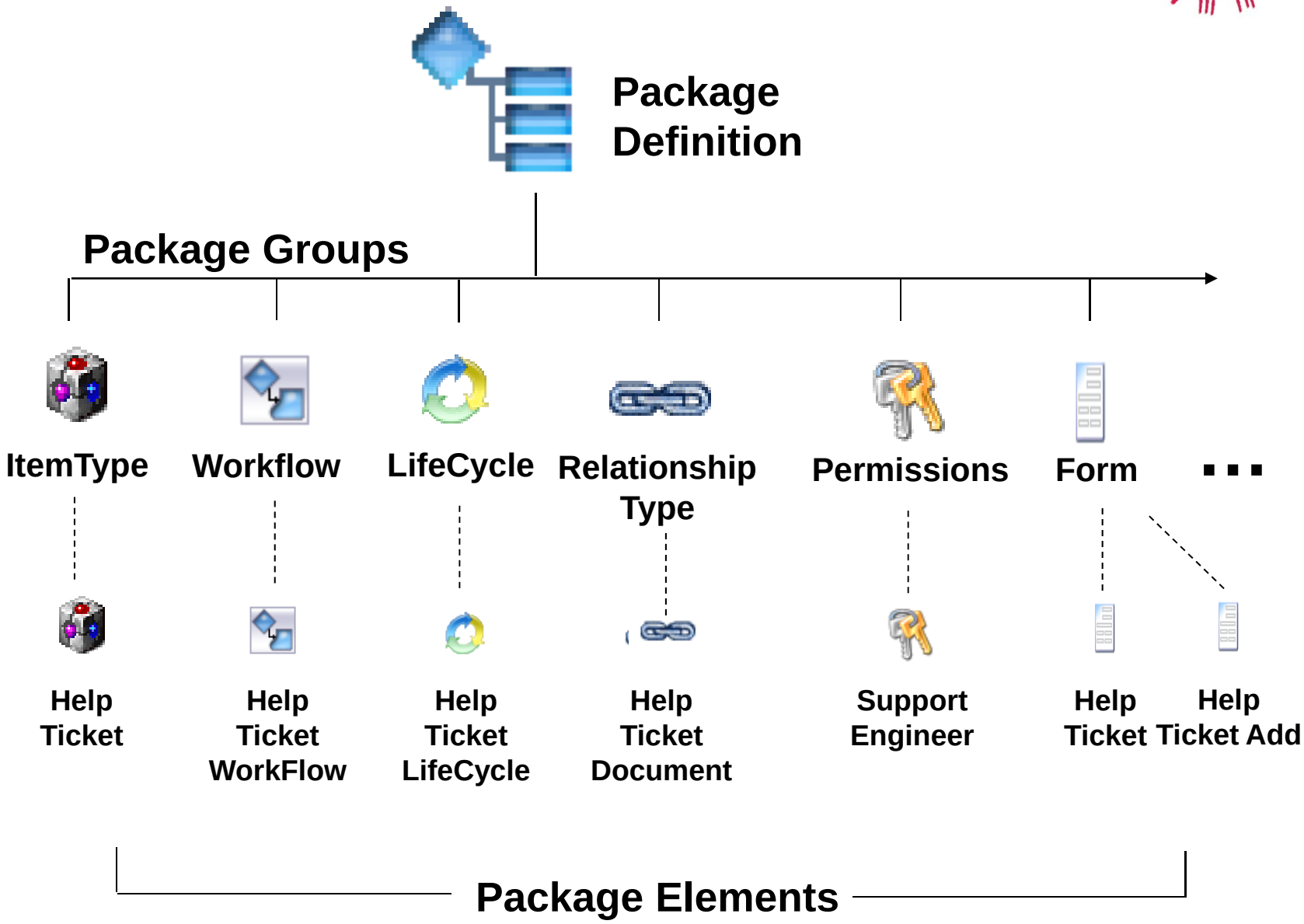


- Packages are sets of AML definitions
- Packages can be complete solutions or incremental changes
- Allows customizations to migrate from:

  Dev -> Test -> Production
- Allows open source exchange of solutions between companies

Copyright © 2010 Aras All Rights Reserved.

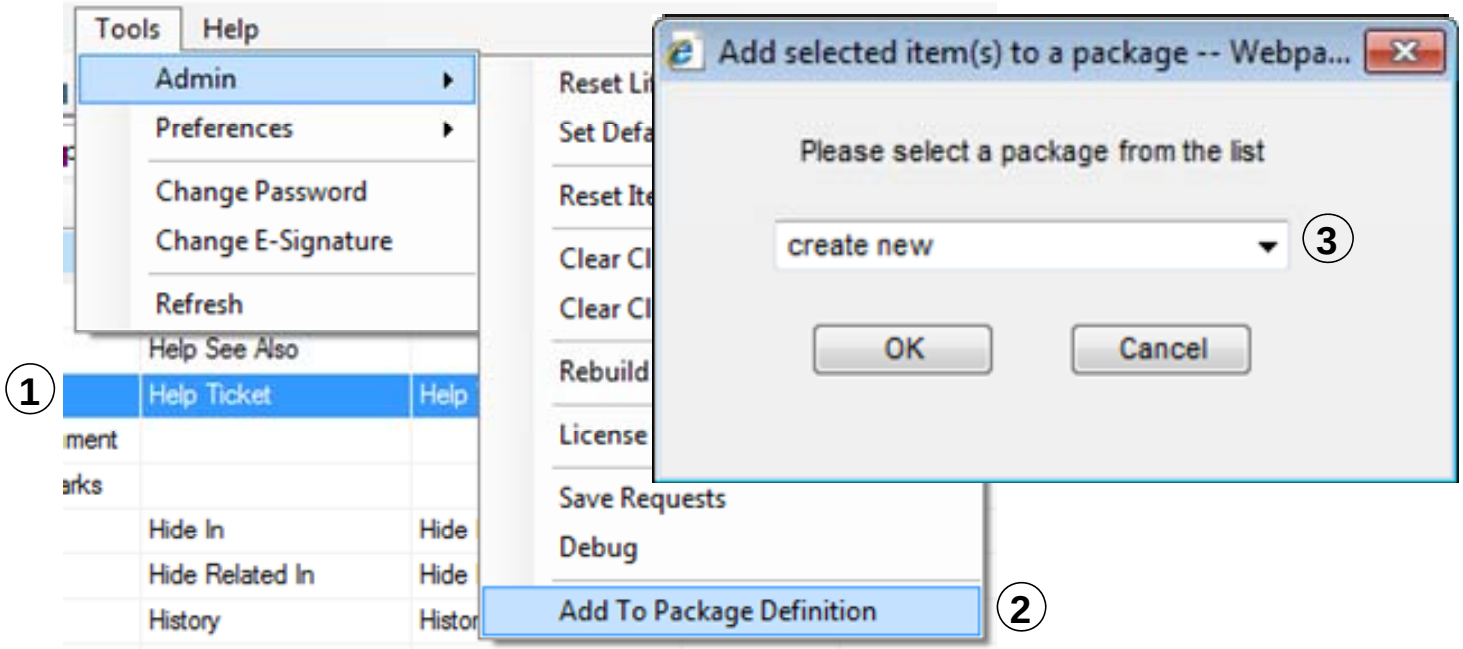
Packaging Overview



Copyright © 2010 Aras All Rights Reserved.

Packaging Process

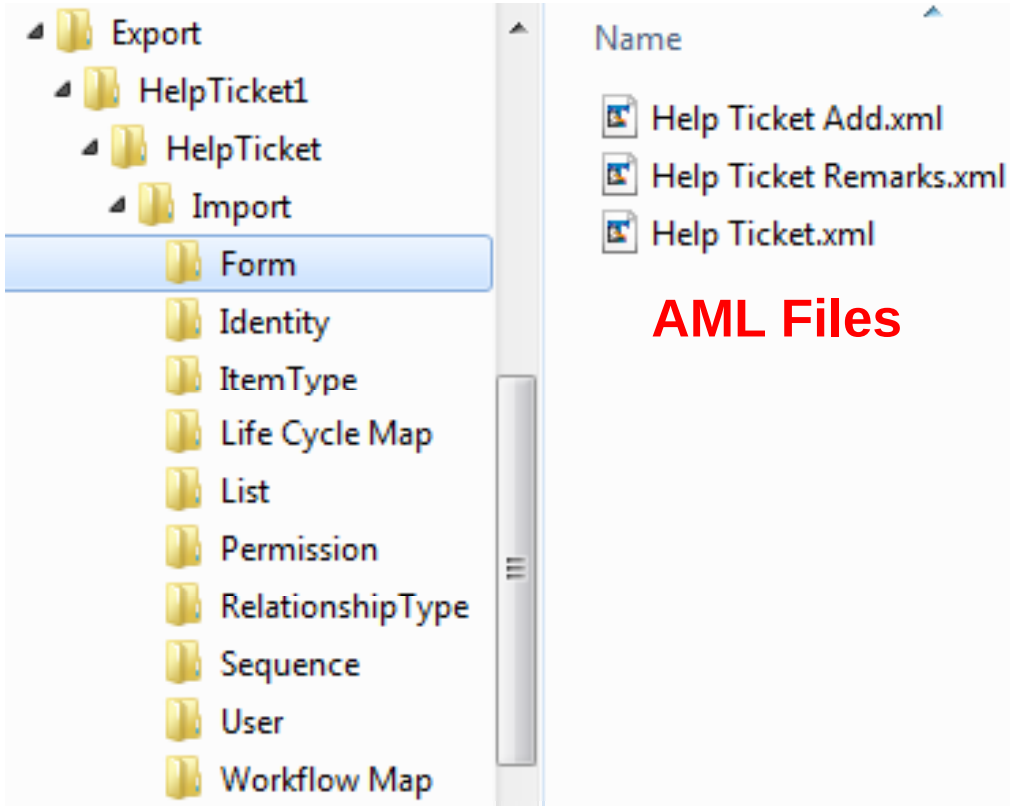
- Assign items to a Package using the Admin client



- External Utilities
  - Import
  - Export

Package

- Folder structure of XML files
- Human readable
- Editable outside of Aras Innovator
- Source Control friendly
- Compatible with standard XML tools



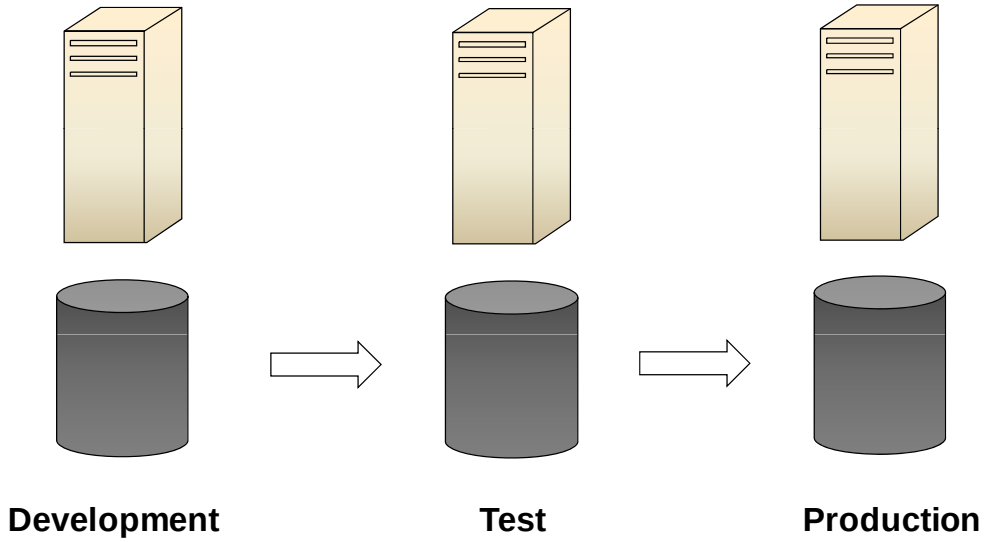
AML Files

File System

Copyright © 2010 Aras All Rights Reserved.

Why Package ?

- Internal systems management
  - ✓ Move updates from Dev to Test to Production



- Sharing solutions with the Aras Community
- Source Code Control

Copyright © 2010 Aras All Rights Reserved.

Best Practices Hints

- Packages are Validated on Export
  - Missing references are flagged
  - Packages can have Dependencies
- Packages are Validated on Import
  - Name and ID collisions are prevented
  - Missing references prevent import
- Detailed feedback and messages are in the Log files

Copyright © 2010 Aras All Rights Reserved.

Best Practices Hints

- Item Naming
  - Item Name is enforced as Unique by Packaging
  - Use a prefix on all your Itemtypes, Lists, Forms, etc.
- When to Package
  - At the end when solution is finished OR
  - Throughout the customizing process
- Export Process
  - Expect to iterate – easy to miss some dependencies
  - Log File has the answers

Copyright © 2010 Aras All Rights Reserved.

Export Log Example

Located in the same directory as the export.exe utility

```
****Export HelpTicket****
start of execution : 4/9/2010 3:19:46 PM
Item id :326CD7710A0B4D0DA0582F9082AA2D02  keyed_name : Help Ticket
Remarks   type : Form successfully exported
Item id :8F0DACB5A10947D9A3BCC2511C917772  keyed_name : Support Record
type : List successfully exported
Item id :1C48C52B899649F180024CDB9C35198E  keyed_name : Help Ticket
Remarks   type : RelationshipType successfully exported
Item id :00C7B038C7D34D3B81615F2224414ADE  keyed_name : Maintenance   type
: Identity successfully exported
Item id :762183BD2B6041538DC865B6FD4FBA74  keyed_name : Response Team
type : List successfully exported
Item id :AEA643870F8C426DB40D0A89109D383F  keyed_name : Engineering   type
: Identity successfully exported
Item id :D723CABAF3A640DDB9F2805CC623F157  keyed_name : Year   type : List
successfully exported
```

Copyright © 2010 Aras All Rights Reserved.

Remember all the possible Package Elements

- Actions
- E-Mail Messages
- Forms
- Grids
- Identities
- ItemTypes
- LifeCycle Maps
- Lists
- Methods
- Permissions
- RelationshipTypes
- Reports
- Sequences
- SQL Items
- Workflow Maps

Copyright © 2010 Aras All Rights Reserved.

Best Practices Hints

- Typical Import Process Errors
  - Missing Permission, List or Identity from Package
  - View – Form on a Relationship ItemType
  - Adding an RelationshipType ItemType to a Package
  - Adding PolyItem auto-generated Lists to a Package

- Process Improvement Ideas:
  - Registry – a MyInnovator service to reserve names
  - Dependency mapping tools

Copyright © 2010 Aras All Rights Reserved.

Community Projects

- Aras Web site for distribution of Packages. Authors include:
  - End-users
  - Partners
  - Aras employees
- Classification and Rating System
  - As-Is
  - Registered
  - Certified
  - Managed (by Aras)

Copyright © 2010 Aras All Rights Reserved.

Community Projects

- Notes
  - Watch the “Versions Supported” field. Packages may not be updated for the latest version of Aras Innovator. If a package you want is not updated, contact the author and offer to help.
  - Submission is optional. We encourage participation, not require it

Copyright © 2010 Aras All Rights Reserved.

Community Projects

- Community Project site URL
  http://www.aras.com/communityProjects/
- Community Project site is a web page connected to myInnovator.com
- Enhancements are planned:
  - ✓ More searching
  - ✓ Check-in
  - ✓ Registry
  - ✓ Versions / Branching
  - ✓ Tighter integration with Forum discussion threads

Copyright © 2010 Aras All Rights Reserved.

More Resources

- Aras Innovator Configuring Solutions Training Class

- Package Import / Export Tools on Community Project site http://www.aras.com/communityProjects/

Copyright © 2010 Aras All Rights Reserved.