ACE 2019
INNOVATE
TRANSCEND
REALIZE

Release 12 Navigating and Searching

aras

Notice of Liability

Innovator V12 Navigation and Search

Overview: In this training session, you will have a hands-on experience with Aras Innovator V12. This new user interface offers expandable Navigation Panels, re-designed menus and toolbars and a big, blue EDIT button! Enjoy!!

Objectives:
- ✓ Login/Logout
- ✓ Navigate the Main Window
- ✓ Understand the Navigation Panel hierarchy
- ✓ Work with Menus and Toolbars
- ✓ Search for Items
- ✓ Work with Tabs (Searches, Items and InBasket)
- ✓ View Items
- ✓ Edit an Item
- ✓ Describe what it means to Claim an Item
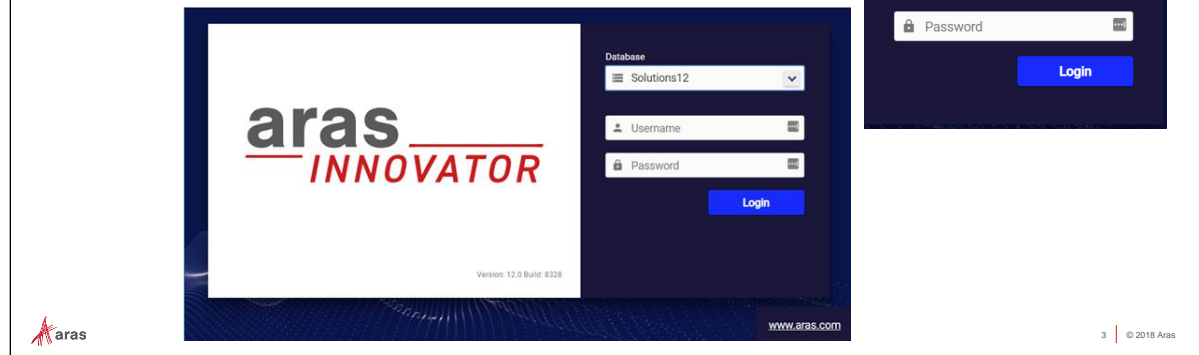
Login/Logout
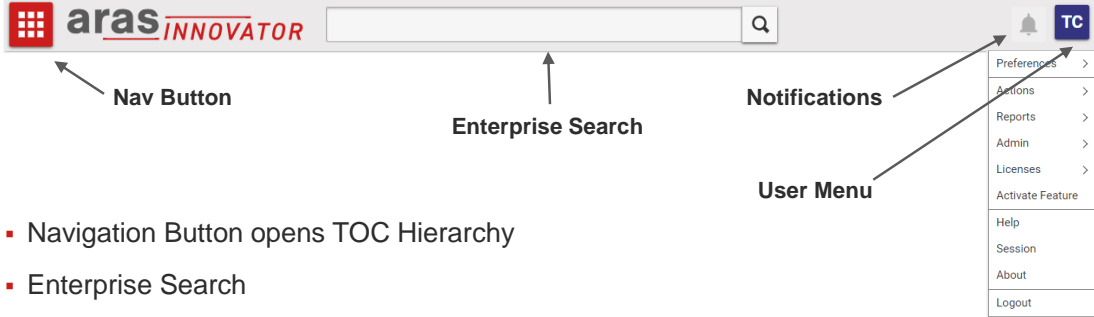
The newly redesigned Login Screen displays an Authentication Framework option upon first login. This allows for a "single sign on" approach to user authentication. When starting the Innovator V12 client, there are no popups, no second browser window, and the graphic is configurable to display custom logos.

Try it… Login to Aras Innovator V12

1. Open a Browser window and enter the server URL given to you by the Instructor. The URL will be similar to http://localhost/Innovator12.
2. On the Login screen, notice the Aras Innovator Version and Build Number.
3. Select the appropriate Database: Solutions12.
4. If the Authentication Framework option shows on the login screen, leave "Login with" set to Aras Innovator.
5. Login with the Username: tchan and Password: innovator.

Navigate the Main Window

- Navigation Button opens TOC Hierarchy
- Enterprise Search
- User Notifications from System Administrator
- User Menu links to top-level commands
- Configurable Start Pages for Users

4 | © 2018 Aras

Navigate the Main Window

The redesigned Innovator Main Window offers a simple and clean user experience, which is customizable to suit your needs. It contains:

- The Navigation button, or "Nav button" gives you access to Innovator Items.
- Enterprise Search provides global searching across Item Types, which is configurable and conforms to permissions.
- Notifications button shows messages from the System Administrator to the user.
- User Menu combines user preferences, reports and custom actions.
- The Workspace Pane in V12 is open to display customizable "home screens." An administrator will be able to identify a specific HTML page as the background of the workspace.
  If a Start Page is defined for the user, like their individual In Basket, it will display on top of the custom HTML background.

Try it… Investigate the Navigation (Nav) Button

1. Click the Nav button.
2. Notice the Contents within the Navigation Panel. This table of contents, or TOC, displays items available to the logged in user, based on permissions granted.
3. Click the Pin button to hold the Navigation Panel on the screen. To un-pin, click the Pin button again.

Try it… Investigate the User Menu

1. Click the User Menu button at the top right of the window. Normally, this button displays a profile image of the user. However, it will display the initials of the name of the currently logged in user, for example: TC for user Tom Chan, if no user profile image exists.
2. In the User Menu, hover over Preferences to see user preferences, including changing the password, and setting an e-Signature for this user.
3. Notice that the User Menu is also where the user goes to display Help, display Session information, create Reports, and Logout.

Note

Closing the browser window does not close the user session.
Users should select the User Menu > Logout to logout of Innovator V12.

The Navigation Panel Hierarchy

- Configurable User Interface (CUI) controls the Navigation Panel, including the TOC
- TOC is multi-level "Panel Style" and "Pin-able"

aras   5   © 2018 Aras

The Navigation Panel Hierarchy

In Innovator V12, the Configurable User Interface (CUI) controls the Navigation Panel contents, including the TOC. Layered navigation panels open to show Create Item Forms and Search Grids. Each panel can be pinned to stay on the screen, and users use the Back button on the ItemType Panel to move back up the navigation hierarchy.
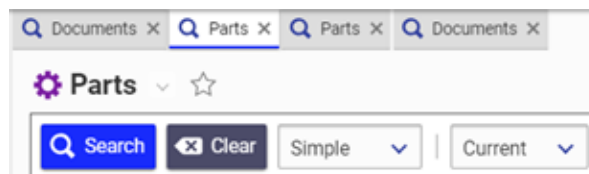
Try it… Navigate to Item Search Grids

1. With the Navigation Panel Contents pinned, click Design > Parts to open the Parts ItemType Panel. This places the ItemType Panel for Parts on the Navigation Panel.
2. Click the Search Parts button on the ItemType Panel to display the Parts Search Grid.
3. Click the Back button on the ItemType Panel to return to the top-level Contents.
4. In TOC, click Documents > Documents to display the Document ItemType Panel.
5. Click Search Documents to display the Documents Search Grid.
6. Notice that there are now two Tabs available in the Workspace Pane: Search Parts and Search Documents.
7. Drag the Search Parts Tab to the right of the Search Documents Tab to rearrange the Tab Order.
8. Feel free to close all tabs except one Part Search tab.
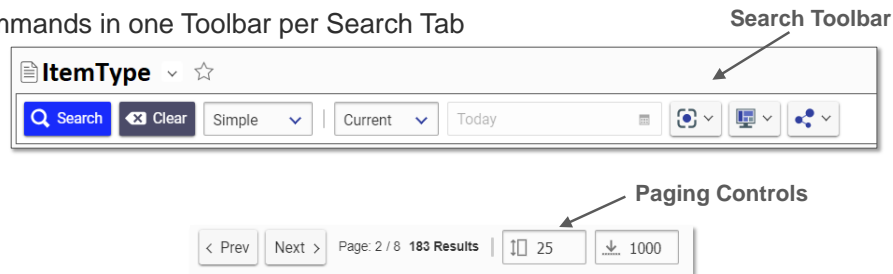
Note

Innovator V12 allows multiple Search Grids to be open for one ItemType. In other words, Search Tabs remains available after opening an Item.

Repeat the steps above to open multiple Parts Search Grids and/or Multiple Documents Search Grids.
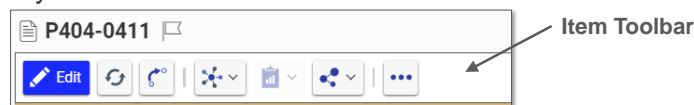
Updated Menus and Toolbars

In Innovator V12, menu bars and command bars are organized for simplicity. For example, everything on the Search Grid toolbar has to do with Search, and all "paging" commands, are at the bottom of returned results.

🖱 Try it… Investigate the Search Toolbar

1. Click on the Parts Search Tab, which should still be open in the Workspace Pane.
2. Click the Search button to display all Parts.
3. Click the Search Modes drop down list to see the choices: Simple, Advanced, AML and Hidden. We will visit search modes later in this session.
4. Click the Query Type drop down list to see the choices: Current, Latest, Released and Effective. Use the Query Date field in conjunction with query types. We will visit query types later in this session.
5. Click the Refine button to show the columns available for display in the Search Grid.
6. Click the Display button to choose a preview preference for this ItemType. The preview options are:
   - Properties – show the system Properties panel to the left of the search grid.
   - Form – show the Form of the selected item in the search grid.
   - Hide – Hides the Properties and Form views.
7. Click the Share button to see the options for exporting the search results in various formats, including Export to PDF.
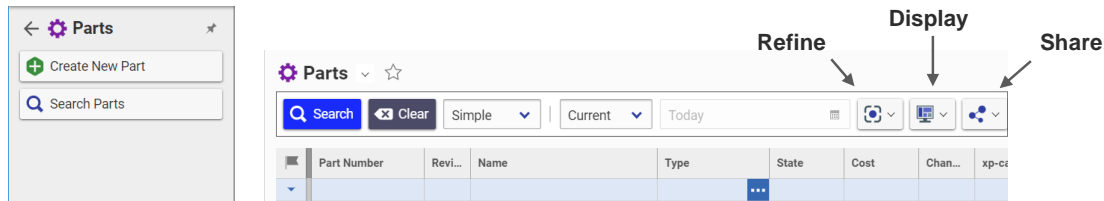
🖱 Try it… Investigate the Item Toolbar

1. Double-Click on any one Part to open the Part Item.
2. Notice the Part Item opens in a new Tab.
3. The Item Toolbar displays the Form, and any other viewable options for this Item, for example 3D PDF or CAD.
4. Close the Part.

Search for Items

There are three search modes in the Search Grid for Items: Simple, Advanced and AML. The Hidden Search mode hides the blue Filter Row. Let's try some Simple Searches:

Try it... Simple Search

1. In the Parts Search Tab, click Clear to clear out all previous search filters.
2. Set the Search Mode to Simple.

Search for all Printers that cost greater than 250 dollars:

3. In the blue Filter row, type *printer* in the Name column, and >250 in the Cost column.
4. Click Search.

Search for all Parts that are of Type Product:

5. Click Clear to clear out previous search filters.
6. Select Product from the Type… column.
   Note that you can also start typing Product, and the column will autocomplete. Choose Product with your mouse to set it as the search criteria for the Type column.
7. Click Search.

Search for all Product Parts that are within the Cost range 10 to 500 dollars:

8. Leave the Type filter set to Product.
9. Widen the Cost column by dragging the right boundary line to the right.
10. Enter 10…500 in the Cost column.
11. Click Search.
12. Click the Cost column heading to sort by cost.

Search using the "OR" operator to find Parts with Part Numbers beginning with either C3 or C4:

13. Click Clear to clear out previous search filters.
14. Enter C3*|C4* in the Part Number Column.
    The "pipe" character acts as an OR operator in Search criteria.
15. Click Search.
16. At the bottom of the Search Results, use the Next button to go to the next page of search results.
17. Click the … Show Total Pages and Results button to see the number of rows returned.
18. Click the Prev button until you to return to the first page of search results.

Hints and Tips for Searching

- Use * or % as wildcards, for example 'a*b' means anything beginning with 'a' and ending with 'b'.
- Use * on its own to select non-blank values.
- Enter 0 or 1 to select columns with checkboxes (Boolean). Enter 1 to search for items that are checked (True). Enter 0 to find items not-checked (False).
- Search for Items by their keyed-name, for example 'Adm*' finds the Identity named Administrators.
- Use <, <=, >, >= operators to filter on numeric properties using mathematical comparisons (e.g. >10).
- Use the range operator … on numeric properties to search for numbers within a specific range (e.g. 10…1000).
- Many filter columns support autocomplete, so you can just start typing.
- Use the left column to search for items claimed by you or someone else.
- Use Refine Search to add/hide columns on the grid (both ItemType and Extended).
- Searches are not case sensitive and use string matching, including dates.
- The […] marker is displayed for fields with a secondary dialog (lookup).
- To perform an "OR" search on a single column you can use the "|" symbol within the field. For example: *a*|b** would find all strings that begin with the letter a OR b.

Append Results

You can also choose to not clear existing search results in a search grid by using selecting Preferences > Append Results from the User Menu. When you apply this setting, any search results that currently exist in the grid are retained and new results are appended to the list. This can effectively be used as an "OR" condition between two or more searches. Remember to disable this option when you no longer need this behavior.

Search for Items: Search Grid

- Search Grid
  - Filter Criteria
  - Wildcards
  - Type Ahead
  - Operators
  - Stop Search

Search Grid

Now, let's use the Simple Search mode and include Dates. Effectivity Type, Effectivity Date, and Date Picker are used for versionable Items only and provide additional filtering on the search grid. Date searches can be further refined using:

- Current is the default and shows the most recent version of any item.
- Setting the Effectivity Date returns the version effective on a particular date. Use the Date Dialog to select a date from the calendar.
- Latest returns the most recent of all versions, which fulfills the date criteria.
- Released returns the most recent version in the released state.
- Dates may be typed in or selected from a calendar by clicking the icon. Time can be included as part of the criteria, or excluded by selecting None.

Try it… Simple Searches using Dates

1. In the Parts Search Tab, click Clear to clear out all previous search filters.
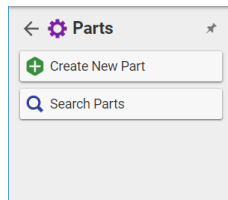2. Set the Search Mode to Simple.

Search for all Parts that were released as of Today:

3. Select Released from the Query Type drop down.
4. Click the "Today" button on Date Dialog in the Query Date field.
5. Click Search.

Search for all Parts with an Effective date of 3/1/2020:

6. In the Parts Search Tab, click Clear to clear out all previous search filters.
7. Select Effective from the Query Type drop down list.
8. Set the Query Date to 3/1/2020, by first choosing the year 2020, and then choosing the month March and the day '1'.
9. Click Search.

Search for Items: Search Results

- Search Results
  - Arrange Columns
  - Multi-Column Sort
- Paging Controls

Total Results   Maximum Results

Results per Page

Search Results

Let's continue using Simple Search mode, adding Search columns and adjusting Paging Controls.

Try it... Search Results

1. In the Parts Search Tab, click Clear to clear out all previous search filters.
2. Set the Search Mode to Simple.

Select the Properties that we want to view in the Search Grid:

3. Click the Refine button on the Search Grid Toolbar.
4. In the Properties Pane, scroll down and click to select the properties Reorder Frequency and Warehouse Location.
5. Click the Refine button again to return to the Search Grid. You can also click elsewhere on the screen to close the Refine dialog.

Arrange Columns in the Search Grid and Multi-Column Sort:

6. Drag the Warehouse Location and Reorder Frequency columns to be between the Type and State columns.
7. At the top of the screen, in the User Menu, turn on Preferences > Sort Across Pages.
8. Click Search. You should retrieve all Parts in the database.
9. Click on the Warehouse Location column heading twice to sort Descending.
10. Press CTRL-Click on the Reorder Frequency column to sort the results by both columns.
11. Click Search.

Use Paging Controls:

12. Use the < Prev and Next > buttons to navigate through results pages.
13. Click the … Show Total Pages button to show a count of rows returned.
14. Change the Results per Page and Maximum Results to control rows displayed.

Advanced and AML Search Modes

The Advanced Search mode is a wizard that allows you to perform a search using properties and search conditions not available in a Simple Search. With multiple filter rows, you add as much criteria as you want to make searches more precise. You can also filter on Relationships and Related Items criteria.

AML Search mode provides an editor to modify the Adaptive Markup Language sent to the Innovator server when you click Search. AML syntax is beyond the scope of this lesson. Please refer to the *Aras Innovator Programmers Guide* for information regarding AML.

Try it… Advanced Search

1. Click Clear to clear out previous search filters.
2. Clear out the Maximum Results paging control to return to the default setting.
3. Set the Search Mode to Advanced.
4. Click the Add Criteria button (plus sign) on the Search Grid Toolbar to add a filter row.
5. Enter or select the following values in the filter row:

Property	Value
ItemType	Part/Relationships/Part BOM
Property	Quantity (Choose Properties of Part BOM > Quantity)
Operation	>
Criteria	4

6. Click Search.
7. Open one of the resulting Parts, and look in the Part BOM Relationship Tab to see which component(s) match the criteria (quantity > 4).
8. Close the Part.

Saved Searches

Saved Searches

To save search criteria for reuse, use the familiar "favorites" method. Click the Favorites (star) button next to the ItemType name to save the current criteria into a named Saved Search.

Try it... Save a Search for Reuse

Save the Advanced Search previously created:

1. Return to the Part Search Tab in Advanced Search mode, and click the Add to Favorite (star) button above the Search Toolbar.
2. Label the search something descriptive, like "Child Quantity > 4".
3. In the Save new SavedSearch window, click the Save button.
4. Click the Saved Searches drop down list to view or reuse the Saved Searches.

Note

If you enter search criteria that matches a previously Saved Search, Innovator will automatically load the Saved Search.

Managing Saved Searches
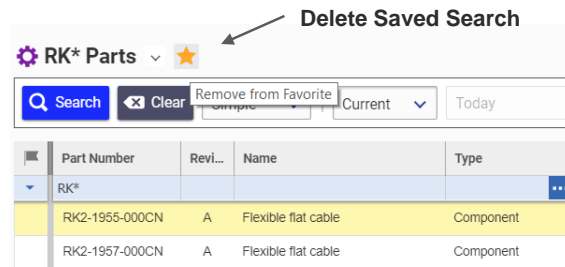
- Favorite Saved Searches

Save new SavedSearch   ✕

Label
RK* Parts   [Save]

☑ Show On TOC

- Delete Saved Search by Removing from Favorites

- Administrator Maintenance in Saved Searches

Delete Saved Search

⚙ **RK* Parts** ⌄ ⭐

[🔍 Search] [⌫ Clear]   Remove from Favorite | Current ⌄ | Today

🏳	Part Number	Revi...	Name	Type	
▾	RK*				...
	RK2-1955-000CN	A	Flexible flat cable	Component	
	RK2-1957-000CN	A	Flexible flat cable	Component	

ⵊaras   12 | © 2018 Aras

Managing Saved Searches

Users maintain their own list of favorite search criteria using Saved Searches. For example, users can Save a Search and delete a Saved Search by simply using "Favorites".

🖱 Try it... Save and Remove a Saved Search

1. Return to Simple Search mode by selecting Simple from the Search mode drop down list.
2. Acknowledge the Search Mode Warning by clicking Clear All, which will clear out any criteria from the filter row and return to Simple Search mode.
3. In the Part Number column, type in rk* to filter for all Parts with Part Number beginning with 'RK'.
4. Click the Search button to run the search.
5. Save this search with the label RK* Parts by clicking the Favorite (star) button.
6. In the Save new SavedSearch window, click the Save button.
7. To remove a Saved Search, click the Favorite (star) button after running the Saved Search.

Note

An Innovator Administrator has complete maintenance control over Saved Searches, including sharing Saved Searches with other users and deleting a Saved Search, by accessing TOC > Administration > Saved Searches.

Working with Tabs
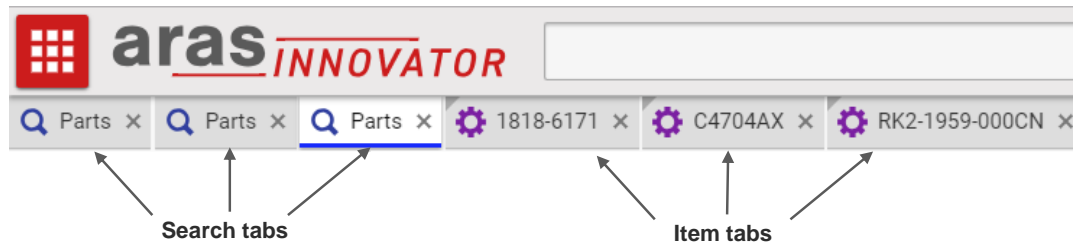
In Innovator V12, Items, Saved Searches, Enterprise Searches and even your InBasket can display in separate Tabs. You can rearrange Tabs by dragging them, and Item Tabs can open in Tear-off windows by clicking the shaded top left corner.
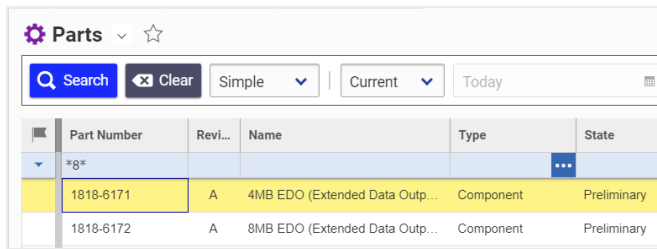
Try it… Work with Multiple Tabs

1. Click the Search Parts button twice to open two additional Search Parts Tabs.
2. On one of the Search Parts tabs, click the Search button to retrieve Parts.
3. Double-click a few Parts to open multiple Part Item Tabs. Return to the Tab containing the search results, after opening each Part.
4. Click the Back button in the Navigation Panel to return to the Table of Contents.
5. Click My Innovator > My InBasket from the TOC.
6. Click Search My InBasket to open My InBasket in a Tab.
7. Notice the different icons identifying the Item Type in each Tab (Search Parts, Part Items, My InBasket).
8. Rearrange the Tabs using Drag and Drop with your mouse.
9. Click the shaded top left corner of one Part Item to open in a Tear-off window.
10. Close the Tear Off Window to close the Part.

View Items

- Right-Click Item to show Context Menu
  - Open
  - Promote
- Double-Click Item in Search Grid to Open in View Mode

Context Menu

Open
Claim
Promote
Properties
Save As
Purge This Version
Delete All Versions
Structure Browser
Where Used
Revisions

Parts

Search | Clear | Simple | Current | Today

	Part Number	Revi...	Name	Type	State
	8				...
	1818-6171	A	4MB EDO (Extended Data Outp...	Component	Preliminary
	1818-6172	A	8MB EDO (Extended Data Outp...	Component	Preliminary

aras

14 | © 2018 Aras
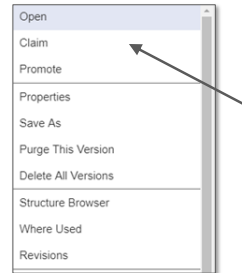
View Items

You can open Items for viewing by either double-clicking in a Search Results Grid, or by choosing Open from the Item Context Menu. Opening Items for view will present the Item in Form View.

Try it… Open Multiple Items using the Context Menu

1. On a Search Tab for Parts, click the Search button to retrieve Parts.
2. Right-Mouse-Click on a few Parts and select Open on the Context Menu, returning to the Search Results Tab in between.
3. Notice that each opened Part shows the Item Properties in Form View.
4. Close all open Tabs.

View Items

Opening an Item displays it in a Read-only Form View. The Item Properties display in the top section, and the Relationship Items display in a section below. Each accordion-style section of the form can be collapsed or expanded using the Accordion buttons at the top-left of each section header. Use the vertical scroll bar on the right to scroll down the screen to see more sections. Use the scrollbars within each section to scroll horizontally.

Try it… Navigate in Form View

1. In the Navigation Panel navigate to TOC > Design.
2. Click directly on the search button (magnifying glass) to open the Parts Search Grid.
3. Search for the Part: C4703A DesignJet 2000CP Printer and open it.
4. Click the Accordion button (^) at the top left corner of the Part section to collapse the Part Properties.
5. Click the Accordion button (^) at the top left corner of the Relationship section to collapse that section as well.
6. Expand both sections by clicking each Accordion button (v) once more.
7. Use the vertical Scroll Bar on the right to scroll up and down through the accordion-style sections.
8. Use the horizontal Scroll Bar at the bottom of each section to scroll within the section (you may need to resize your window to see scroll bars).

Try it… Investigate the Item Toolbar

1. Click the Refresh button on the Item Toolbar to synchronize the property values across tabs of your client session.
2. Click the Promote button on the Item Toolbar to display available Lifecycle State promotions available for this Item.
3. Click X to Close the Promote Window, without performing the lifecycle promotion.
4. Click the Navigate button and select History to display an Audit Trail of this Part.
5. Click X on the Item History to close it.
6. Click the Reports button and select BOM Costing Report to run a report on this Part.
7. Close the BOM Costing Report Tab.
8. Click the Share button on the Item Toolbar to see how to export or share Item Properties.
9. Click the More… button on the Item Toolbar to see the Item Properties, Item Permissions and run Custom Actions available to this Part Item.

Edit an Item

- Click Edit Button in View Mode
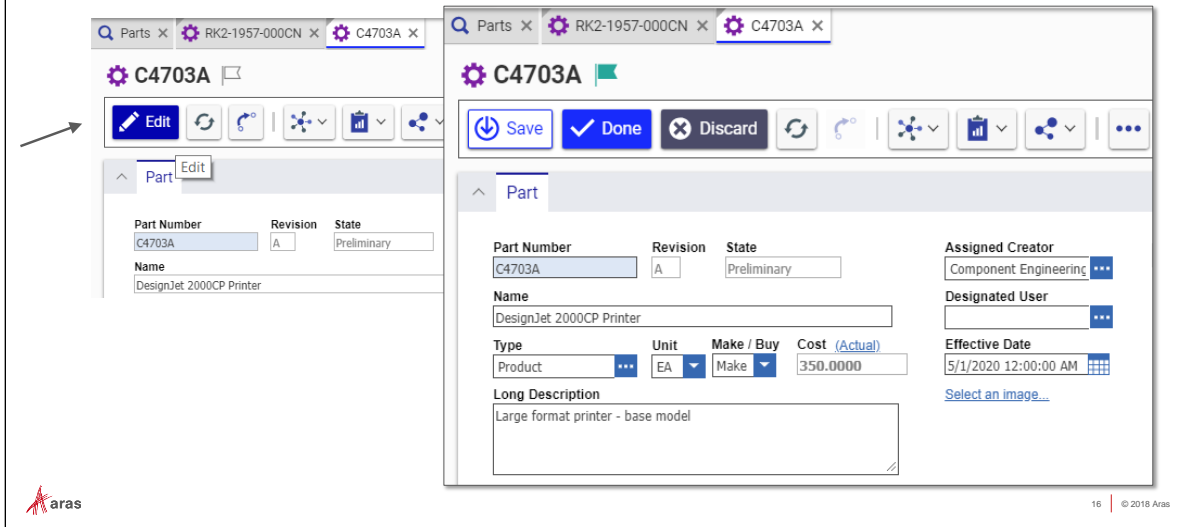
Edit an Item

To edit an open Item in Innovator V12, simply click the large, blue Edit button on the Item Toolbar. This does two things for the user:

- Provides editing capabilities for the open Item, and
- "Claims" the item in the database, preventing any other user from editing it

Try it… Open an Item for Edit

1. On the Item Toolbar of the Part: C4703A DesignJet 2000CP Printer, click the Edit button.
2. When you are in Edit Mode, notice that the Edit button changes to a Save button, and a Done button and a Discard button display on the Item Toolbar.

- Clicking Save will save your changes to the database, and you remain in Edit Mode.
- Clicking Done will save your changes and close Edit Mode, releasing your Claim.
- Clicking Discard will remove all of your changes, and close Edit Mode, releasing your Claim.

3. Leave the Part Item in Edit Mode.

Edit Toolbar

- Edit Toolbar
  - Save
  - Done
  - Discard
  - Refresh
  - Promote
  - Navigate
  - Reports
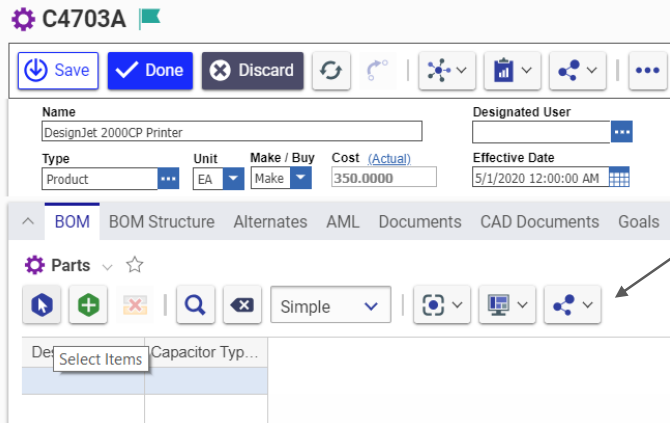 - Display
  - More…
- Edit Properties

Edit Toolbar

When an Item is in Edit Mode, the Item Toolbar changes to include Edit functions. Features that are not allowed during Edit, like Promote, are disabled.

Try it… Use the Edit Toolbar

1. With the Part: C4703A DesignJet 2000CP Printer open in Edit Mode, notice that the Item is "Claimed" for you; the Item Claim Flag is green.
2. Make a small change to the Long Description text.
3. Click Save to save your changes. Notice the Item Saved Message. You remain in Edit Mode.
4. Make another small change to the Long Description text.
5. Click Done. You will see a pop-up message telling you that the Item was successfully saved to the database, and the Item returns to View Mode.
6. Click the Edit button again
7. Make another change to the Long Description text
8. Click the Discard button.
9. Click OK to confirm Discard Changes. Your latest changes will not be saved, and you return to View Mode.

Edit Related Items

When an Item is in Edit Mode, you can also make changes to its Related Items. Relationship Tabs allow you to link other Items to this Item and to provide more information about the current Item. Each Relationship Tab has a toolbar where you can Select or Create Items to relate, Delete Related Items, and perform Searches.

Try it… Create Relationship using Select Items

1. Click the Edit button on the Part: C4703A DesignJet 2000CP Printer Tab to enter Edit mode.
2. Collapse the Properties Section of the Part: C4703A DesignJet 2000CP Printer, to see the Related Items Section more prominently.
3. On the Relationship Tab Toolbar, click the Select Items button to open the Search dialog – Part.
4. In the blue Filter Row, search for a part named "Optical sensor" to add to the Printer BOM.
5. Click on the Optical sensor Component row and click the Return Selected button (green check mark).
6. Notice the Optical sensor Component is now on the Part BOM for the DesignJet 2000CP Printer.
7. Click Save to save the new Relationship, and remain in Edit mode.

Try it… Create Relationship using Create Item
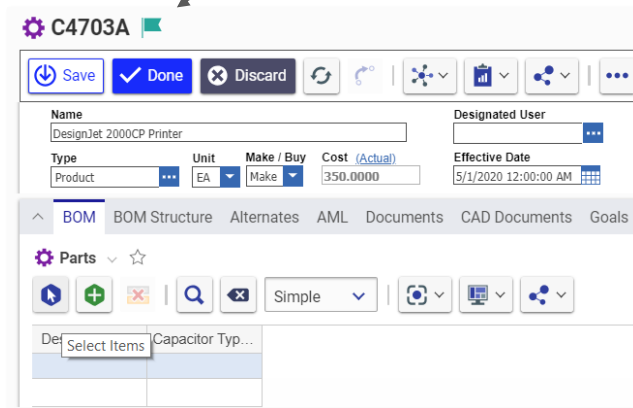
1. On the Relationship Tab Toolbar, click the Create Item button to add an empty row in the BOM.
2. Enter or select the following values:

Property	Value
Part Number	C3801-60099
Name	Paper sensor
Type	Component
Quantity	2 (override default of '1')

3. Click the Done button on the Part to save the new Relationship part and return to View mode.

Claim an Item

When you edit an Item, you implicitly put a "Claim" on the Item record. As we saw previously, leaving Edit Mode will automatically release the Claim. Therefore, Editing an Item automatically manages the Claim process.

But, what if you want to "Claim" some Items to work on in the near future, without worry that someone else will edit them? Innovator provides a Claim button to explicitly reserve an Item to edit at a later time.

Try it… Claim Items in Edit Mode

1. Again, edit the Part: C4703A DesignJet 2000CP Printer, and notice that the Item is "Claimed" for you, setting the Item Claim Flag to green.
2. Expand the Part Properties section and make a small change to the Long Description text.
3. Click Save to save your changes.
4. Without closing the Part: C4703A DesignJet 2000CP Printer Tab, click Search Parts on the Navigation Panel to open a new Search Tab.
5. In the first search column (under the flag), select Claimed By Me, then click the Search button.
    You will see all Parts that have been "Claimed" by you, which prevents other users from editing those parts.
6. Return to the Part: C4703A DesignJet 2000CP Printer Tab, and click the Done button to finish editing.
7. Search for Parts "Claimed By Me" again, and you should have zero results, as clicking the Done button also releases the Claim.

Try it… Claim Items from Search Grid

1. Close all Tabs and return to the Navigation Panel for Parts.
2. Click the Search Parts button to open the Parts Search Grid.
3. Search for all memory module Components (*memory module* in the Name property).
4. Claim all the memory module Components by selecting them all (CTRL-A) and select Claim from the Context Menu (Right Mouse Click).
5. Notice the green flag in the leftmost Search grid column.

Claimed Items in Search Grid

When you explicitly reserve an Item by putting a Claim on it, it will prevent any other user from opening it for Edit. This information about Claimed Items is searchable.

🖱 Try it… Search for Claimed Items

1. On the Search Grid for Parts, click the Clear button to clear criteria.
2. Click Search to show all Parts.
3. Click the down arrow in the first column and notice the criteria available for the Claimed column.

   - Claimed By Me filters for all Items that you have Claimed, either explicitly, or implicitly by Edit.
   - Claimed By Others filters for all Items that other users have Claimed
   - Claimed By Anyone shows all Claimed Items

4. Click Claimed By Me and then click Search to show all Parts claimed by you.
5. In the Claimed Column, click Claimed by Others to show any Parts claimed by other users.
6. In the Claimed Column, click Claimed by Anyone to show any claimed Parts.
7. Use CTRL-Click to select all Parts you claimed (green flags).
8. Unclaim all Parts by clicking Unclaim from the context menu (right-mouse click).
9. In the Claimed Column, click Clear Criteria to clear out the Claim filter.
10. Close the Part Search Tab.
11. Under the User Menu, select Logout to end your Innovator session.

Summary

In this unit, you learned Navigation, Searching and Editing Items in Innovator V12.

You should now be able to:

- ✓ Login/Logout
- ✓ Navigate the Main Window
- ✓ Understand the Navigation Panel hierarchy
- ✓ Work with Menus and Toolbars
- ✓ Search for Items
- ✓ Work with Tabs (Searches, Items and InBasket)
- ✓ View Items
- ✓ Edit an Item
- ✓ Claim Items

On Your Own Challenge

1. Login to Aras Innovator V12 with Username: "tchan" and Password "innovator".

2. Open TOC > Design > Parts and pin it to the Navigation Panel.

3. Search Parts to locate all Parts with the word 'sensor' in the Name (*sensor*), and are Type 'Component'.

4. Save your search to Favorites.

5. Claim all of these sensor parts to prevent others from editing them.

6. Edit the Part Number C4723-69071 Take-up reel sensor assembly.

7. Set the Designated User to be Tom Chan.

8. In the BOM Relationship tab, add a related part by Creating a new part, using the following values:

Property	Value
Part Number	C8150-000036
Name	3.6 W Ion Battery
Type	Component
Quantity	2 (override default of '1')

9. Save your changes.

10. Look at the Part History and notice the Rev and Generation values of the Take-up reel sensor assembly.

11. Re-run your Saved Search that returns all Parts with the word 'sensor' in the Name.

12. Edit the Part Number C4704-60195 Media sensor assembly.

13. Add the newly created Ion Battery part to the Part BOM of the Media sensor assembly using Select Items.

14. Click Done to finish editing the Media sensor assembly, and close the Part Item Tab.

15. On the Part Search Grid, Search for all Parts claimed by you.

16. Release your claim on all sensor components.

17. Logout of Innovator V12.