

**STUDENT TRAINING GUIDE**

**ACE 2019**

INNOVATE  
TRANSCEND  
REALIZE

# **Configuring Custom ItemTypes to Support Visual Collaboration**



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# Configuring Custom ItemTypes to Support Visual Collaboration

**Overview:** In this session you will learn how to enable items of any ItemType to participate in Visual Collaboration messages. Visual Collaboration allows users to add message comments to items as well as attach files which become part of a discussion thread. Discussion threads can then be assigned to forums to allow selected users to follow a discussion. Built in file viewers also allow users to markup files and share remarks about a file with other members of their organization.

- Objectives:**
- ✓ Reviewing Standard Features
  - ✓ Reviewing Visual Collaboration Templates
  - ✓ Enabling Visual Collaboration on an ItemType
  - ✓ Configuring a Discussion Template
  - ✓ Creating Message Feeds
  - ✓ Including Viewer FileTypes using a FileSelector Template
  - ✓ Modifying Sidebar Style
  - ✓ Configuring Comment and Sidebar Visibility
  - ✓ Configuring Discussion Forum Options
  - ✓ Viewing User Preferences

## Overview

- Visual Collaboration allows users to share text comments and files that are associated with a selected item
- A collection of built in viewers also allow users to markup and annotate 2D PDF, 3D PDF, and image files
- Messages become part of an aggregated discussion where multiple users can provide real time feedback to previous comments
- Part and Document ItemTypes are preconfigured to enable Visual Collaboration
- An administrator can select and enable any ItemType to use Visual Collaboration as well as determine what options are available to a user



## Overview

Visual Collaboration is a built-in features that allows users to share ideas, information and remarks about a selected item. Users only require the "get" permission on the item to be able to access a discussion panel which allows for text comments as well as the ability to attach files.

Built-in file viewers allow a user to open and markup several common file types including 2D and 3D PDF files as well as images.

Message comments can also be aggregated into a discussion thread that can also include comments from items that are related to the current item.

Aras Innovator is preconfigured to support this feature on Part and Document ItemTypes. In this session, you will learn more about how this configuration works and how you can enable this feature on any ItemType.

## Reviewing Visual Collaboration Features

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- Examining the Side Bar Options
- Displaying the Discussion Panel
- Working with Comments
  - Create
  - Edit
  - Reply
  - Flag
  - Erase
- Filtering Discussion Comments



### Reviewing Collaboration Features

The following pages highlight the user features of Visual Collaboration, which include the ability to create, edit and reply to message comments in a discussion panel.

Sorting and filtering options also allow a user to quickly locate specific comments.

## Examining Side Bar Options

Display Form →

Display 3D PDF File →

Display PDF File →

Display Image File →

Item Keyed Name →

Select File to View →

MP0101

Part Number: MP0101, Revision: B, State: Preliminary

Name: Makerbot Replicator

Created By: Terry Adams, Created On: 10/11/2017, Modified By: Terry Adams, Modified On: 1/24/2018, Locked By: , Major Rev: B, Release Date: , Effective Date: , Generation: 2, State: Preliminary

Type: Assembly, Unit: EA, Make / Buy: Make, Cost (Calculated): 4760.7859

Long Description: The MakerBot Replicator by MakerBot. Published on March 12, 2012. www.thingiverse.com/thing:18813

Assigned Creator: , Designated User: , Effective Date:

Sequence...	Part Number	Revision	Name	Type	Quantity	State
5	MP2942	B	Body	Assembly	1	Preliminary
10	MP2954	B	Extruder	Assembly	1	Preliminary

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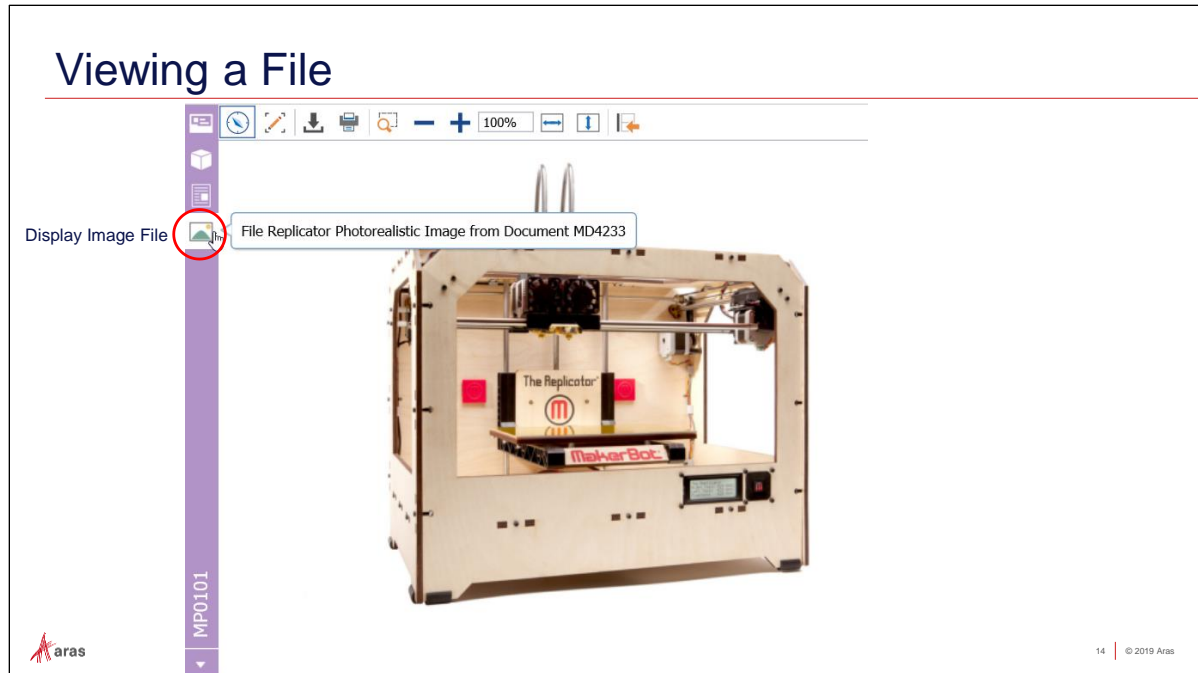
## Examining Sidebar Options

Items that support Visual Collaboration display a colored sidebar, which contains buttons that access various configured file viewers.



### Try it... View Sidebar

Login as the admin user (password=innovator) and locate and open Part MP0101 for view.



## Viewing a File

Depending on the file(s) associated with the current item (or related items) one or more sidebar buttons appear for each file type (3D PDF, 2D PDF, Image). Clicking on the sidebar button invokes a built-in Aras Innovator viewer.



### Try it... View a File

1. Click the Display Image sidebar button to view the associated image file.
2. Click the Form side button to return to the form display.

## Displaying Discussion Panel

The screenshot displays the Aras discussion panel interface. On the left, the 'Part' details for 'Makerbot Replicator' (Part Number: MP0101, Revision: B, State: Preliminary) are shown. The main area displays a discussion thread for the same part. The thread includes a comment by Mike Miller (January 24, 2018 at 6:08 AM) about updating the CAD model and BOM. Below the comment is a discussion reply by Mike Miller (January 24, 2018 at 6:06 AM) stating that the MCAD design has been updated. The interface includes a 'Show Discussion' button (circled in red), a 'Discussion Toolbar' with search and filter options, and a 'Discussion Comment' section with a text box and 'Attach' and 'World' buttons. A 'Discussion Reply' section is also visible below the comment.

Part Details:

Part	Part Number	Revision	State
Makerbot Replicator	MP0101	B	Preliminary

Discussion Thread:

**Discussion Comment:** Mike Miller (January 24, 2018 at 6:08 AM) - MP2954 - 4 - Preliminary  
CAD model and BOM now updated with Hi Perf fans. Note 8-blade instead of 7-blade construction.

**Discussion Reply:** Mike Miller (January 24, 2018 at 6:06 AM) - MP0101 - 2 - Preliminary  
I updated the MCAD design, you can see the new larger board and greater clearance for the SD card.

## Displaying the Discussion Panel

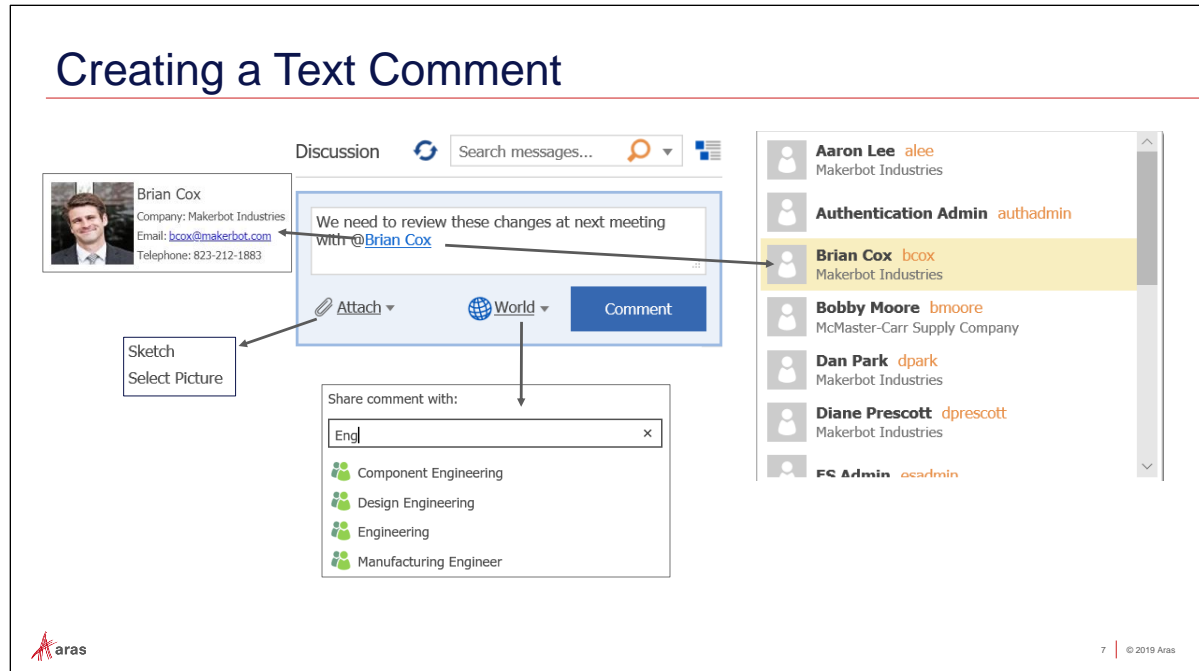
The Show Discussion Panel button displays the panel adjacent to the current Form. The panel includes a toolbar which supports filtering and sorting of message comments and a comment text box to enter a new message. As each comment is added by one or more users it is displayed in a discussion thread.



### Try it... Display Discussion Panel

Click the Show Discussion Panel button to display message comments.





## Creating a Text Comment

Text comments are added in the comment textbox and can also include pictures and sketches which become viewable to other users participating in the discussion.

Entering an @ sign character in the textbox displays a prompt window with all of the users registered in the database. When a user is added to a comment, the user information is available by hovering over the name with the mouse pointer.

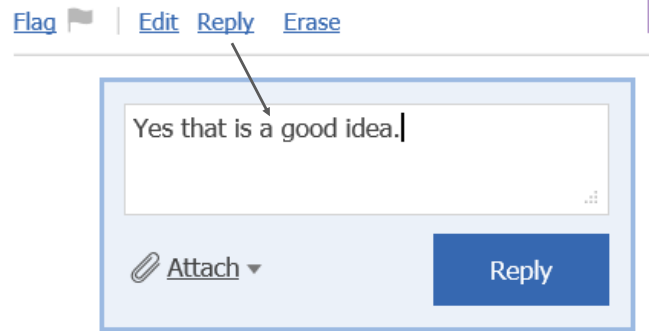
Message comments can also be shared with other users. The default share for a Part item is the World identity but can be changed by the message creators by replacing the identity from the search list provided.



### Try it... Create a Comment

Type some text in the comment text box and press the Comment button to add to the discussion.

## Replying to a Message



### Replying to a Message

Message replies are captured as part of the conversation by clicking on the Reply link. A reply can also contain attachments, which are included in the discussion thread.



#### Try it... Reply to a Message

Select an existing comment and click on the Reply link to respond to a message.

## Flagging and Unflagging A Message

The screenshot illustrates the process of flagging and unflagging a message in the Aras Innovator Admin interface. The message is: "We need to review these changes at next meeting with @Brian Cox".

On the left, the 'Flag' link is highlighted with an arrow labeled "To Flag".

On the right, the message is shown after being flagged. The 'Flag Count' is 1, and the 'Who flagged message' dropdown shows "Flagged by you". An arrow labeled "To Unflag" points to the "Unflag" link.

The interface also shows the "Edit", "Reply", "Hide replies", and "Erase" links.

The Aras logo is in the bottom left corner, and the copyright notice "© 2019 Aras" is in the bottom right corner.

## Flagging and Unflagging a Message

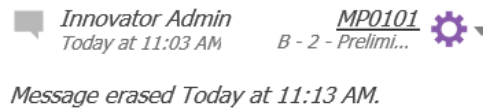
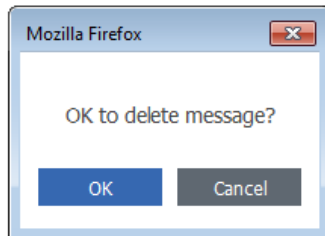
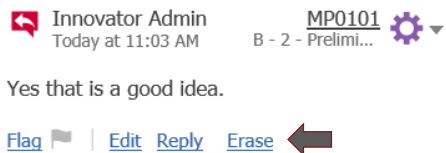
Flags are used to bring attention to a message. Clicking on the Flag link marks the comment and the flag indicator color is set to gold. A flagged message also shows how many other users have flagged this comment and who they are.



### Try it... Flag a Message

Click the Flag link on an existing comment. Click the flag counter to view who flagged the message.

## Erasing a Message



## Erasing a Message

The Erase link removes a message. A placeholder appears to show that the message has been removed.

### Note

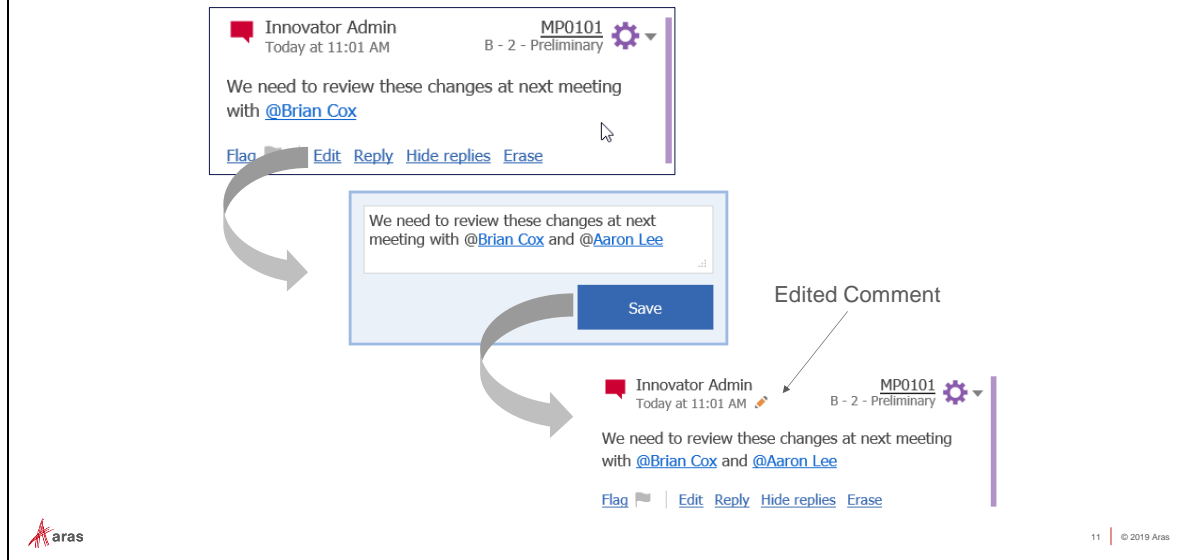
Only the message creator (or an administrator) can erase a message. Anyone else receives an error message.



### Try it... Create a Comment

Select a message you have created (as the Innovator Admin) and click the Erase link to remove the comment.

## Editing a Message



### Editing a Message

A message creator can edit comment text by click on the Edit link. Only the creator of the message has access to this link.

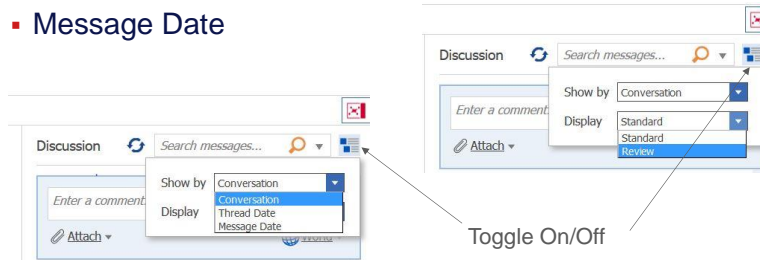


### Try it... Edit a Comment

Click on a message you have created (as the Innovator Admin) – or create a new comment. Click the Edit link to make a change to the comment text and press the Save button.

## Sorting Messages

- Conversation
- Thread Date
- Message Date
- Standard Display
- Review Display



## Sorting Messages

Comments can be sorted in several ways as well as being displayed in Standard or Review mode.

### Conversation (Default)

Messages are sorted by the time the message was posted. The most recent message is on top.

### Thread Date

Messages are sorted by date with the most recent on top. Determination of "recent" is based only on the time of the message itself, not on any replies. The messages are displayed in a threaded style.

### Message Date

Messages are sorted by date with the most recent on top. Determination of "recent" is based only on the time of the message itself, not on any replies. The messages are displayed in a flat style with all replies listed at the same level as Comments.

## Message Displays

- Standard - Markup snapshots are shown in compressed view.
- Review - Markup snapshots are expanded for easier viewing.



### Try it... Sort Messages

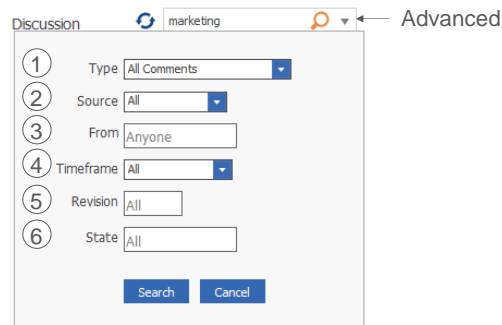
1. Click the Display Settings button and try sorting by Thread Date and Message Date.
2. Change the display from Standard to Review.

## Filtering Messages

### Basic Search



### Advanced Search



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## Filtering Messages

Messages can be filtered using Basic or Advanced mode to locate specific comments based on their content.

### To Use Basic Search

Enter the comment text to be found and press the Search icon. Any messages that contain that text will be displayed.

### Advanced Search Options

Advanced Search allow you to enter additional message criteria in addition to the search text.

- ① **Type**  
Search by message type including, text only, snapshot only, audio, video and automated messages.
- ② **Source**
  - All – search in all messages.
  - This Item Only – search for messages related to the current item.
- ③ **From**  
Anyone or a specific user.
- ④ **Timeframe**  
Within the last - allows the user to specify a number and a time value (Minutes, Hours, Days, or Months).  
Date Range – specify a range of message create dates.
- ⑤ **Revision**  
Search based on this related item revision number.



### Try it... Filter Messages

Perform a basic search for messages that contain the word “options”.

## Viewing Message Aggregation

**Part**

Part Number: MP0101

Created By: Terry Adams  
Created On: 10/11/2017  
Modified By: Terry Adams  
Modified On: 1/24/2018  
Locked By: B  
Release Date: 1/24/2018  
Effective Date: 1/24/2018  
Generation: 2  
State: Preliminary

BOM Structure Alternates

Document Number...	Revision	Me
MP0101-D	B	Me
MP0101	B	Me

Discussion

Search messages...

Mike Miller  
October 16, 2017 at 10:08 AM  
A - 1 - Preliminary  
MP0101  
Action: Add, Comments: name: "MakerBot Replicator"  
Flag Reply

Mike Miller  
October 16, 2017 at 10:08 AM  
A - 1 - Preliminary  
MP0101-D  
Action: Add, Comments: name: "MakerBot Replicator Drawing"  
Flag Reply

Diane Prescott  
October 09, 2017 at 10:05 AM  
A - 2 - Released  
MP0101-DOC-2  
Sections 3 and 4 are now added to the spec, let me know of any issues.

**CAD Document**

**Document**

MakerBot Industries  
DOCUMENT NUMBER: MP0101  
TITLE: MakerBot Replicator P1  
REVISION: 5.4

MakerBot Replicator Specific:

Related Issues

Issue Number	Description
14500-005	Creating MakerBot Replicator 3D print

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## Viewing a Message Aggregation

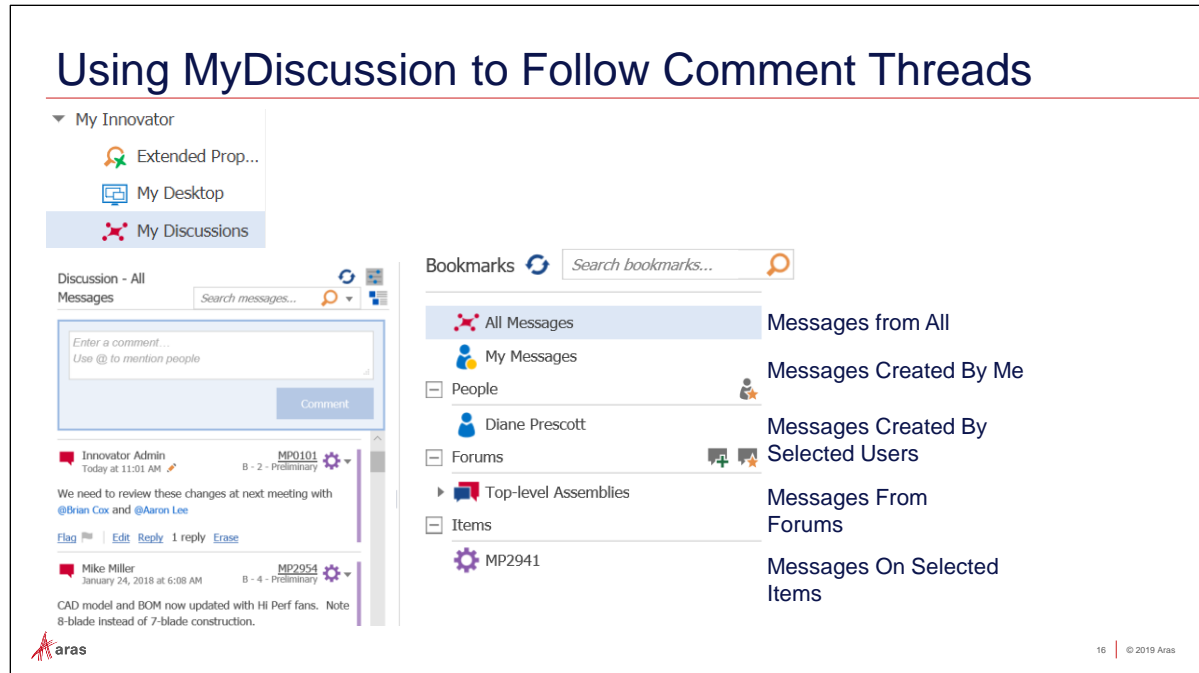
Message discussions can be configured to aggregate message comments (and files) so that they display in a collected discussion thread. In the example above, a Part item discussion thread includes comments from the current Part as well as comments from a related CAD Document and Document item.



### Try it... View a File

1. Show all messages in the display panel for the Part MP0101 and scroll through the comments.
2. Notice the content is derived from aggregated Document and CAD Document items associated with this part.





## Using My Discussions to Follow Comment Threads

Discussion Bookmarks allow a user to filter messages in My Discussions to restrict content in comments they are interested in.

### All Messages

Uses all of the filters configured in My Discussions to create the message list.

### My Messages

Only display messages for the current user.

### Follow Selected Users

Show messages created by one or more selected users.

### Follow Forums


Show messages from items added to a named Forum or the result of a saved item search.

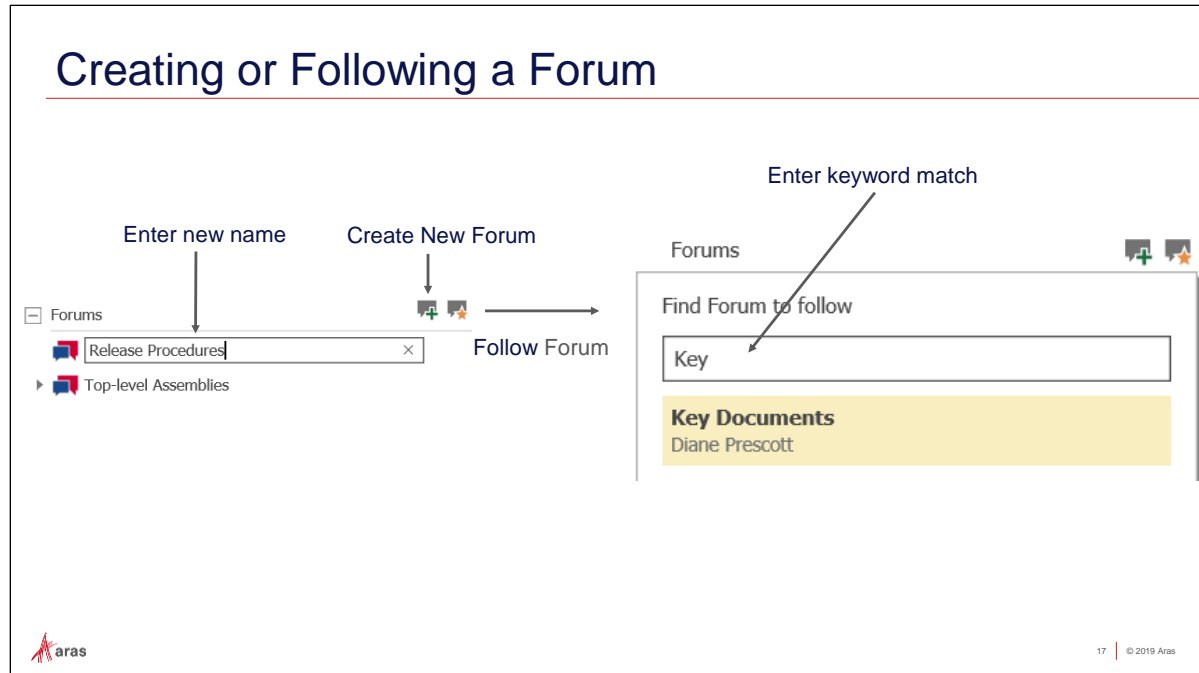
### Items

Only shows messages related to one or more selected items.



## Try it... Follow Comment Threads

1. Select My Innovator -> My Discussions from the TOC to view All Messages.
2. Click the Follow People button  and add Diane Prescott.
3. Click on Diane Prescott's name to display her comments.



## Creating or Following a Forum

Forums can be created to manage discussion threads based on a topic that may involve many items. A user supplies the name of a new Forum or can search for an existing Forum to follow a discussion.

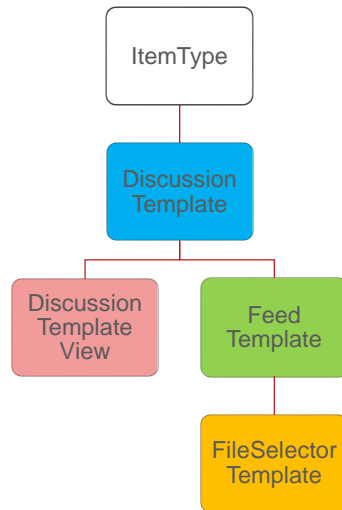
Items can be added to a Forum via a Saved Search or by the Add Item(s) to Bookmarks Action from the item search grid or the Item Actions menu.



### Try it... Follow a Forum

1. Click the Follow Forum button  and locate Key Documents.
2. Click on the Key Documents forum to follow the contents.

## Reviewing Visual Collaboration Templates



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### Reviewing Visual Collaboration Templates

Visual Collaboration is configured using a collection of templates that are associate with an ItemType.

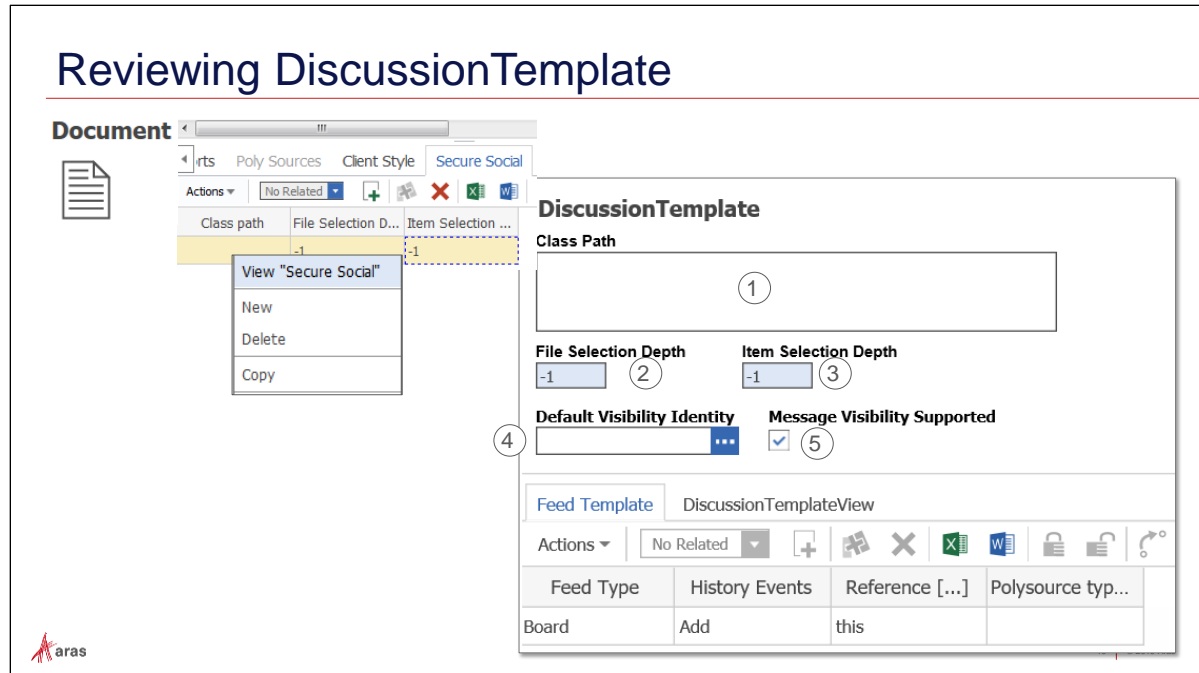
Once an ItemType has been enabled for "Secure Social" Messaging, a series of related templates can be created and modified to indicate how messages and files will be displayed to a user.

Each enabled ItemType can support one or more Discussion Templates that can be individually styled using a Discussion Template View.

Each Discussion Template then contains one or more Feed Templates that indicate what messages will be aggregated from items related to the current ItemType.

In addition, each Feed Template can then be configured with one or more File Selector Templates that indicate which related files should be aggregated and available to the built-in viewers from the parent item.

In the next section, we will review how the Part ItemType has been configured to use Visual Collaboration using these templates. We will then enable a custom ItemType and create new templates to support the same features.



## Reviewing DiscussionTemplate

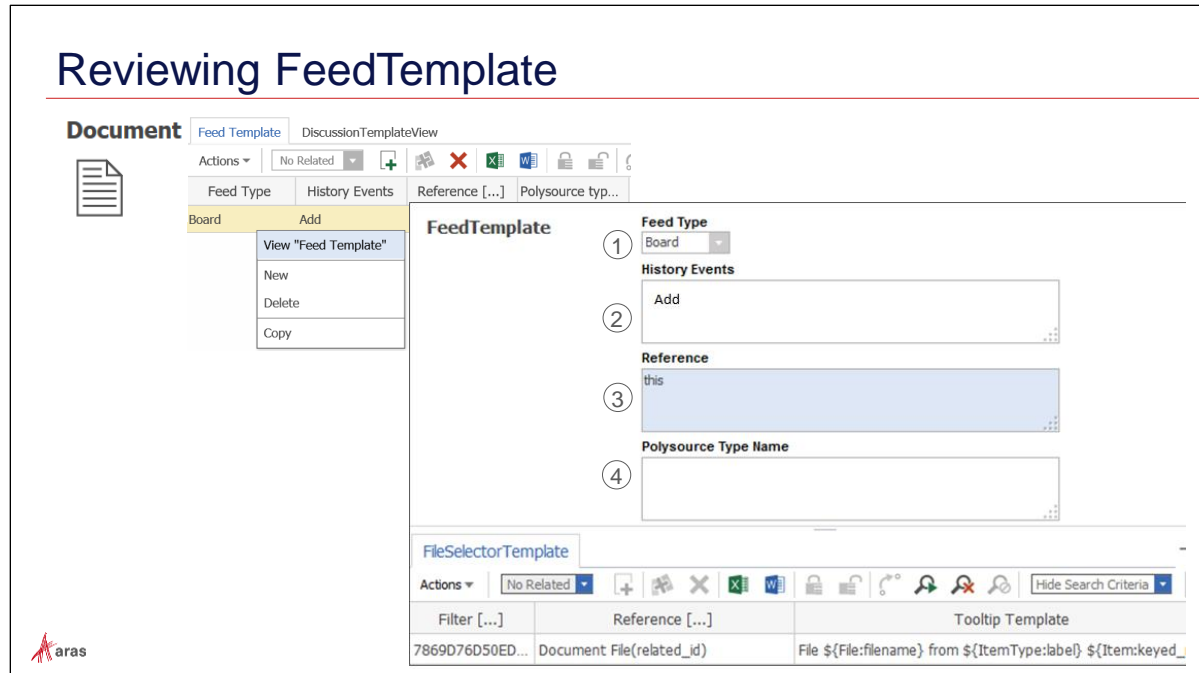
The DiscussionTemplate defines how message comments and files will appear (and become available) to a user. Each DiscussionTemplate contains the following configuration options:

- ① **Class Path**  
If the enabled ItemType has a defined Class Structure (classification) then a different DiscussionTemplate can be defined for each subclass. This allows you to customize message and file aggregation based on the selected Class Path of the item.
- ② **File Selection Depth**  
Controls file lookup recursion for file aggregation. If the enabled ItemType allows relationships to other enabled items which are related to files, this number indicates how many levels of recursion. -1 indicates there is no limit.
- ③ **Item Selection Depth**  
Controls message lookup recursion for message aggregation. If the enabled ItemType allows relationships to other items which contains discussions, and the related items are then further related to other items, this number indicates how many levels of recursion. -1 indicates no limit.
- ④ **Default Visibility Identity**  
Determines the default share identity when a message comment is created. If left blank, the identity is assumed to be World. Otherwise a specific identity can be supplied
- ⑤ **Message Visibility Supported.**  
If unchecked, the message comment cannot be shared with other users.



### Try it... View DiscussionTemplate

1. Make sure you are logged as the admin user (password=innovator).
2. Open the Document ItemType for edit and select the Secure Social relationship tab (far right).
3. Right click on the row and choose View 'Secure Social' from the menu to view the current template.



## Reviewing FeedTemplate

Each DiscussionTemplate is configured with at least one FeedTemplate. A FeedTemplate defines what message comments will be displayed to the user. The following fields are available:

- ① **Feed Type**  
Board or Discussion. Each ItemType enabled for Secure Social Messages must contain a Board feed type so that messages can be displayed for the items created from this ItemType. The Discussion feed type is used to configure messages from items related to items of this type (discussed later in this unit).
- ② **History Events**  
Audit trail events can automatically be captured as part of an item discussion and displayed in the Discussion Panel. History Events are only available for Board feed types.  
*event\_name* – name of event to be captured (e.g. Add, Update, Promote, Delete) – to capture more than one event use a | symbol – Add|Update|Promote. To capture all events use the \* symbol.
- ③ **Reference**  
A reference to an item, relationship, or property. A Board feed references the current item (this).
- ④ **Polysource Type Name**  
Allows a different discussion feed to be created for each source type of a PolyItem (outside the scope of this session).



### Try it... View FeedTemplate

Right click on the Board Feed Type and choose View 'Feed Template' to display the configuration.

## Reviewing FileSelectorTemplate

**Document**

FileSelectorTemplate
Actions ▾

Filter [...]
Reference [...]
Tooltip Template

7869D76D50ED4...
Document File(related\_id)
File \${File.filename} from \${ItemType:label}...

View "FileSelectorTemplate"
New

**FileSelectorTemplate**

①

**Filter**

7869D76D50ED4BD4985BECB20B1102F7|992B142FCE6C4EF8B71417220  
CD7E92D|50AF497B7A114235979F882CEC8EFD6|8A85DD9A6E0346F5A  
E423314E3650041

②

**Reference**

Document File(related\_id)

③

**Tooltip Template**

File \${File.filename} froi

**Filter**

7869D76D50ED4BD4985BECB20B1102F7|992B142FCE6C4EF8B71417220  
CD7E92D|50AF497B7A114235979F882CEC8EFD6|8A85DD9A6E0346F5A  
E423314E3650041

**Reference**

Document File(related\_id)

**Tooltip Template**

File \${File.filename} froi

## Reviewing FileSelectorTemplate

FileSelectorTemplates are used to indicate which files should participate in a file aggregation and what file types are supported by the file viewers. Any files included in file aggregation can then be viewed easily by a user by click on the appropriate sidebar button. The FileSelectorTemplate contains the following options:

- ① **Filter**  
A filter indicates which types of files should be supported by the built-in file viewers. The filter is configured using the GUID of a FileType item. To enter more than one FileType GUID use the | symbol as a delimiter. In the example above, a filter has been created for PDF, JPG, PNG and GIF file types.
- ② **Reference**  
An ItemType/Property reference to a File item. For standard relationships this takes the form of: *RelationshipName(related\_id)*. If an Item property of type File has been configured directly on the enabled ItemType the name of the item property can also be specified. In the example above, a reference is made to the related File of the Document File relationship.
- ③ **Tooltip Text**  
Text to be displayed when a user hovers over a sidebar viewing button.



### Try it... View FileSelectorTemplate

1. Select the FileSelectorTemplate relationship tab from the Discussion Template and right click to view the first FileSelectorTemplate.
2. After reviewing, close the FileSelectorTemplate window.
3. Close the Feed Template window to return to the Discussion Template.

## Reviewing DiscussionTemplateView

**Document**

Discussion pan...	Form tooltip template	SM template [...]	Name	Client
Discussion Panel...	Form of \${ItemType:keyed_name}	F1E9620C1AB3	61E72CC93171...	JavaScript

### SSVCPresentationConfiguration

**Discussion Panel Behavior**

① Discussion Panel On / Discussion Panel Off

**Form Tooltip Template**

② Form of \${ItemType:lab}

**SM template**

③ F1E9620C1AB3408588708B68E18D51DE

**Name**

④ 6A64D55E2B804775859

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## Reviewing DiscussionTemplateView

The DiscussionTemplateView contains style configuration options for the Message Display Panel. The following options are available.

- ① **Discussion Panel Behavior**  
To automatically show the Discussion Panel on an item enabled for Secure Social Messages select Discussion Panel On. Otherwise the user must click the Show Discussion Panel button.
- ② **Form Tooltip Behavior**  
Controls the tooltip text displayed when a user hovers over a discussion icon in the item sidebar. You can enter standard text to be displayed to the user along with parameter variables {} that are substituted in the text.
- ③ **SM Template**  
A SecureMessageViewTemplate can be configured to indicate how the comment text should be styled. Several existing preconfigured SM templates are available in the standard database.
- ④ **Name**  
A system assigned name for this DiscussionTemplateView



### Try it... View Discussion Template View

1. Click on the DiscussionTemplateView relationship tab of the DiscussionTemplate and then right click to view the "SSVCPresentationConfiguration".
2. Save, unlock and close all windows after viewing the presentation.

## Enabling Visual Collaboration on an ItemType

- 1) Determine the required item and file aggregation
- 2) Enable the appropriate ItemType(s) to support Visual Collaboration
- 3) Create a FeedTemplate to define message aggregation
- 4) Create a FileSelectorTemplate to define file type aggregation
- 5) Configure the DiscussionTemplateView to define UI options
- 6) Configure Comment and Side Bar visibility
- 7) Define Forum defaults and/or restrictions



## Enabling Visual Collaboration on an ItemType

Enabling Visual Collaboration on an ItemType requires creating and configuring the templates discussed on the previous pages. To demonstrate, we will walk through the enablement process steps using a sample use case to define the necessary configuration.


### Summary of Steps

1. First determine what type of item will be considered the "parent" item and then explore the relationships and/or item properties configured on that ItemType to define what messages and files should be aggregated.
2. Edit each selected ItemType and enable it to support "Secure Social Messaging".
3. Create one or more FeedTemplates to define message aggregation.
4. Create one or more FileSelectorTemplates to indicate which files will be aggregated and to define which file types will be supported.
5. Modify the DiscussionTemplateView to change any user interface styles.
6. Hide the Side Bar and Discussion Comments for certain identities or item classifications.
7. Define Forum defaults and/or restrictions if necessary.



## Reviewing Example Use Case

### Design Request



Creator Info

**Created\_On**  
3/7/2019 12:21:20 PM

**Creator**  
Innovator Admin

**Title**  
Additional configuration suggest

**Description**

**Cost**  **Patent?** ☐ **Completion Date**

**Classification**  **State**  **Thumbnail**

**Customer**  
Wal-Mart

**Customer**

**Name**  
Wal-Mart

**Main Phone**  
800-555-6543

**Contact Name**  
Molly Dempsey

**Address**  
702 SW 8th St

**City**  
Bentonville

**State**  **Country**

**Web Site**  
http://www.walmart.com

**Documents** **Files**

**Actions**

Document Number ..	Revision	Name
MP0101-DOC-1	A	MakerBot Replicator Requirements...

**Actions**

File Name [...]	File Type [...]
Test Plan.pdf	PDF Document

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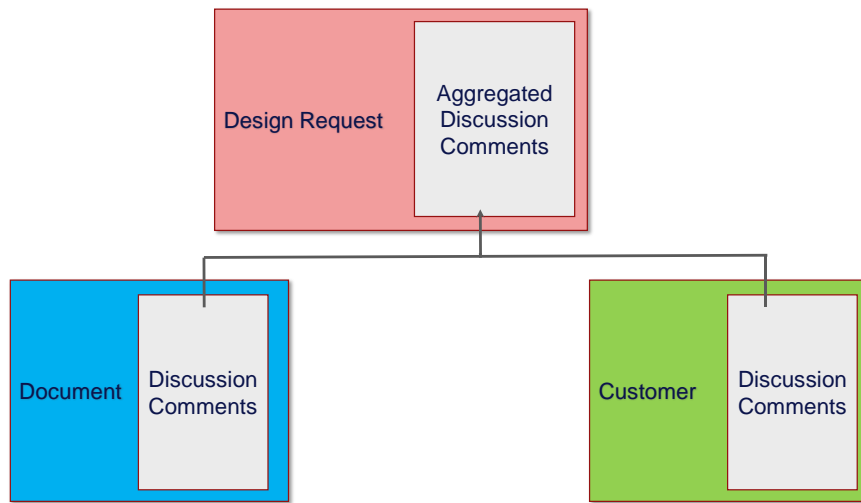
## Reviewing Example Use Case

To demonstrate how Visual Collaboration can be enabled on one or more ItemTypes, we will configure the example use case shown above.

A custom ItemType named Design Request has been created in the student database that contains two relationship types to Document as well as File. In addition an item property named `_customer` has been created that can point to an item of type Customer.

We will enable the Design Request and Customer ItemTypes for Visual Collaboration and configure the desired message and file aggregation to allow users to create and share comments between a Design Request, and a related Customer and Document(s).

## Determining Message Aggregation

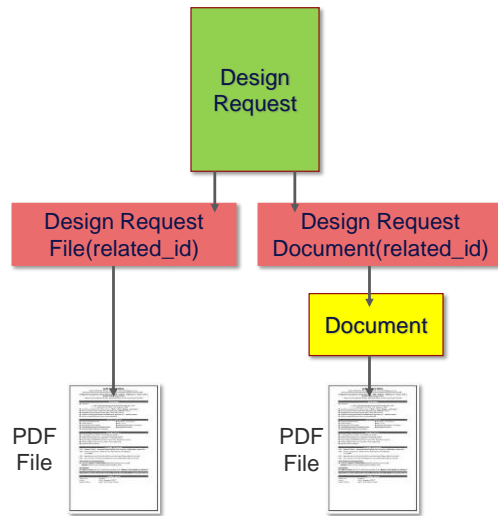


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### Determining Message Aggregation

Before configuring the system, it is important to determine what items should participate in message aggregation. For this example, both Documents (using a relationship) and a Customer (using an item property) can be related to a Design Request item (as shown above).

## Determining File Aggregation and Filtering



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### Determining File Aggregation and Filtering

File aggregation and File Type filtering also need to be determined before configuration begins.

In this example, a user is allowed to associate a file directly to a Design Request using the Design Request File relationship.


Because files are also associated with related Document items (using the Design Request Document relationship) they can also be included as part of the aggregation.

For this simple implementation we will only filter on 2D PDF file types.

## Enabling Visual Collaboration on an ItemType

### Design Request

**ItemType**



**Class Structure**

Show Parameters Tab

Never

**Name**

Design Request

**Singular Label**

Design Request

**Plural Label**

Design Requests

**History Template**

Default

**Default Structure View**

Design Requests

**Versioning**

Versionable ☒

Discipline Automatic

Revisions Default

**Search**

Auto Search ☐ Default Page Size

Max Records

Implementation Type

☒ Single Item ☐ Poly Item ☐ Federated Item

**Small Icon**

Select an image...

**Large ICON**

Select an image...

**Permissions**

☐ Unlock On Logout

☐ Dependent

☐ Is Relationship

☒ Enforce Discovery


☒ Use Src Access

☒ Allow Private Permissions

**Enable for Secure Social**

### Customer

**ItemType**



**Class Structure**

Show Parameters Tab

When Populated

**Name**

Customer

**Singular Label**

Customer

**Plural Label**

Customers

**History Template**

Default

**Default Structure View**

Tabs Off

**Versioning**

Versionable ☐

Discipline Automatic

Revisions Default

**Search**

Auto Search ☐ Default Page Size 25

Max Records

Implementation Type

☒ Single Item ☐ Poly Item ☐ Federated Item

**Small Icon**

Select an image...

**Large ICON**

Select an image...

**Permissions**

☐ Unlock On Logout

☐ Dependent


☐ Is Relationship

☒ Enforce Discovery

☒ Use Src Access

☒ Allow Private Permissions

**Enable for Secure Social**


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## Enabling Visual Collaboration on an ItemType

Any ItemType can be enabled to support "Secure Social" Messages. Once an ItemType has been enabled, it cannot be disabled. In this example, you will enable both the Design Request and the Customer ItemTypes. (The Document ItemType has already been configured for Secure Social Messages out of the box.)



### Try it... Enable Visual Collaboration

1. Locate and edit the Customer ItemType.
2. Click the 'Enable For Secure Social' button to enable Visual Collaboration.
3. Save, Unlock, and Close the Customer ItemType.
4. Locate and edit the Design Request ItemType.
5. Click the 'Enable For Secure Social' button to enable Visual Collaboration.
6. Save the Design Request ItemType, but leave it locked for the next exercise.

## Defining 'Secure Social' Templates

**ItemType**

**Name**  
Design Request

**Singular Label**  
Design Request

**Plural Label**  
Design Requests

**History Template**  
Default

**Default Structure View**  
[Dropdown]

**Small Icon**  
[Select an image...](#)

**Large ICON**  
[Select an image...](#)

**Class Structure**  
**Show Parameters Tab**  
Never

**RelationshipTypes** Views

**View "Secure Social"**

**Actions** No Related

**Class path** File Selection

**Life Cycles** Workflo

**Default Visibilit...**

**Aras**

**28** | © 2019 Aras

### Defining Secure Social Templates

Once an ItemType has been enabled, a default Discussion Template (also known as Secure Social) is created automatically.



#### Try it... Define Secure Social Template

1. Make sure the Design Request ItemType is open for edit (locked).
2. Click on the Secure Social relationship tab and select the first row.
3. Right click and choose View "Secure Social" from the context menu.

## Configuring DiscussionTemplate

**DiscussionTemplate**

Class Path

(1)

File Selection Depth      Item Selection Depth











(2)       (3)

Default Visibility Identity      Message Visibility Supported

(4)  ...      ☒ (5)

---

Feed Template DiscussionTemplateView

Actions ▾ No Related ▾           Hide Se...

Feed Type	History Events	Reference [...]	Polysource typ...
-----------	----------------	-----------------	-------------------

## Configuring DiscussionTemplate

The DiscussionTemplate determines file and message aggregation as well as the ability for a user to share a message comment with an Identity.



## Try it... Configure DiscussionTemplate

1. Make sure the DiscussionTemplate is locked and then leave the Class Path field blank. We will not classify a discussion in this example.
2. Leave the File Selection Depth as -1. This indicates that the file recursion is unlimited.
3. Leave the Item Selection Depth as -1. This indicates that the message recursion is limited.
4. Choose Design Engineering for the Default Visible Identity. This means when a user creates a new comment the default share identity will be set to this group. (They can select a different group.)
5. Leave the Message Visibility Supported option checked. We will allow the user to share comments with others.
6. Save changes to the template.

## Creating Message FeedTemplates

**Create New Feed(s)**

Feed Template DiscussionTemplateNew

Actions ▾ No Related ▾ + X Excel Word Lock Unlock Refresh Undo Redo Hide Se

Feed Type	History Events	Reference [...]	Polysource typ...
Board	Add Update ①	this	
Discussion	②	_customer	
Discussion	③	Design Request Document(related_id)	

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## Creating Message FeedTemplates

Message FeedTemplates define the source of comments in a discussion thread. Every DiscussionTemplate requires one Board feed which references the current comments entered by the user on the starting parent item (Design Request). Additional Discussion feeds can then be added which aggregate message comments and files from related items.



### Try it... Configure Message Feed Template

1. Make sure the DiscussionTemplate is locked, then click in the History Events cell of the Board Feed Type and enter the events Add|Update. Audit trail entries will automatically be added to discussion thread of the current item as comments.
2. Click the New Relationship button to define another FeedType of type Discussion and enter \_customer as the reference. Messages from a related Customer item will be aggregated into the Design Request discussion thread.
3. Click the New Relationship button once more and again define the FeedType as Discussion. Provide the reference "Design Request Document(related\_id)". Any discussions on related Document items will be aggregated into the Design Request discussion thread.
4. Save changes to the DiscussionTemplate.

## Determining Included Files

- Files are included for viewing and markup using a FileSelectorTemplate
- Determine which file types will be included for viewing and obtain GUID

The screenshot shows the Aras Innovator interface. On the left, the 'File Handling' section is expanded, showing a list of file types. The 'PDF Document' file type is selected, and a context menu is open over it. The 'Properties' option is highlighted. On the right, the 'FileType "PDF Document" prop...' window is open, displaying the file type details. The 'Copy ID' button is circled in red.

Name	Description
PDF*	
PDF Document	Adobe Acrobat PDF Document

FileType "PDF Document" prop... X

**FileType**

Created By: Innovator Admin  
 Created On: 8/29/2002  
 Modified By: Super User  
 Modified On: 9/19/2018  
 Locked By:  
 Major Rev: A  
 Generation: 1  
 State: Released

Copy ID Copy Link

## Determining Include Files

Files can also be included and aggregated for viewing and markup as part of a Visual Collaboration discussion. Before configuring a file selector template, the types of files to be included must be determined. Aras Innovator maintains a collection of FileType items, which describe each kind of file stored in an Aras Vault along with the appropriate viewer configuration. A file selector template is then configured using the selected FileTypes.

File selectors require the GUID of the desired FileType item(s). In this example, you obtain the GUID of the PDF Document (2D) FileType item.



### Try it... Determine Included Files

1. Select Administration -> File Handling -> FileTypes from the TOC.
2. Search for the description "Adobe Acrobat PDF Document" and then right click and select Properties from the context menu.
3. Press the Copy ID button to copy the GUID of this FileType to the windows clipboard and then close the Properties window.



## Configuring FileSelectorTemplate

Feed Type	History Events	Reference [...]	Polysource typ...
Board	Add Update	:this	
Discussion		Design Request D	
Discussion		_customer	

Filter [...]	Reference [...]	Tooltip Template
7869D76D50ED4...	Design Request File(related_id)	File \${File:filena...

## Configuring FileSelectorTemplate

A FileSelectorTemplate indicates what files will be included in a Visual Collaboration discussion and what file types will be available for the built-in viewing tools.

### Filter

Lists the file types to be supported by the viewers. Each FileType item has an associated GUID which is used in the filter expression of the FileSelectorTemplate. In this example, the PDF Document (2D) file type is included as the filter. To include more than one filter use the "|" symbol as the id delimiter.

### Reference

A FileSelectorTemplate also contains a reference location to a File item. A file can be referenced via a relationship item or directly with an item property. In this example the file(s) directly associated with a Design Request are referenced using the Design Request File relationship.



### Try it... Configure FileSelectorTemplate

1. Return to the Discussion Template, ensure it is locked for editing, right click on the first feed (Feed Type of Board) in the Feed Templates relationship grid, and select View 'Feed Template' from the context menu.
2. Lock the Feed Template and then click the New relationship button in the FileSelectorTemplate relationship grid to create a new file selector.
3. Paste the GUID obtained for the desired FileType in the text box and press the Save button. In this example, the GUID of the Adobe PDF Document FileType is used.
4. Click on the Reference[...] column and provide the relationship reference "Design Request File(related\_id)" in the textbox and press the Save button.
5. Save, unlock and close the FeedTemplate to return to the DiscussionTemplate.

## Configuring the DiscussionTemplateView

The screenshot displays the Aras configuration interface for the DiscussionTemplateView. The left pane shows the 'DiscussionTemplate' configuration with fields for Class Path, File Selection Depth, Item Selection Depth, Default Visibility Identity, and Message Visibility Supported. The right pane shows the 'SSVCPresentationConfiguration' configuration with fields for Discussion Panel Behavior (set to 'Discussion Panel On'), Form Tooltip Template, SM template, and Name. A context menu is open over the first template in the list, showing options like 'View', 'Pick/Replace', and 'Remove'.

## Configuring the DiscussionTemplateView

Presentation of the Visual Collaboration discussion can also be customized using a DiscussionTemplateView. In this example, the Discussion Panel is turned on by default so that an end user sees the message comments as soon as an item is opened for view.



### Try it... Configure the DiscussionTemplateView

1. Select the DiscussionTemplateView tab and then right click on the first template and select View "SSVCPresentationConfiguration" from the content menu.
2. Lock the SSVCPresentationConfiguration item and choose Discussion Panel On from the list of options.
3. Save, unlock and close the DiscussionTemplateView to return to the DiscussionTemplate.
4. Save, unlock and close the DiscussionTemplate and then the Design Request ItemType.

## Testing Visual Collaboration Configuration

- Create a new Design Request
- Add a related Document and File
- Select a Customer

The screenshot shows the 'Design Request' form in the Aras Innovator application. The form includes fields for Title (TEST), Description, Cost, Patent?, Completion Date, Classification, State, Customer (Wal-Mart), and Team. A sidebar on the left shows '2 files for PDF Viewer' and 'Created On' information. A discussion panel on the right shows a comment from 'Innovator Admin' and a document 'MP0101-DOC-1'.

Document Number...	Revision	Name	Type	Status
MP0101-DOC-1	A	MakerBot Replicator Requirements...	Product	Released

## Testing Visual Collaboration Configuration

Once the essential configuration is complete you can test the results by creating a new Design Request and associating some Documents and Files.



### Try it... Test Visual Collaboration

1. Select Design Innovator -> Design Requests from the TOC and create a new Design Request.
2. Create a new relationship to an existing Document from the Documents tab.
3. Create a new File relationship to an existing PDF file in the Training Files-> PESTudents folder of the student computer.
4. Associate an existing Customer to the Design Request using the Customer field on the form.
5. Save changes to the request.
6. Use the sidebar buttons to view any files associated with this item and related items (file aggregation).
7. Note that the discussion panel contains item history comments as well as comments from the related Document and Customer items (message aggregation).

## Configuring Comment and Side Bar Visibility

Properties RelationshipTypes **Views** Server Events Actions Life Cycles Workflows TOC Access TOC View

Actions ▾ Pick Related ▾ [Icons: Add, Remove, Lock, Unlock, Refresh, etc.] Hide Search Criteria

Form Name ▲	Type ▲	Description	Identity [...]	Classification	Display Priority	Secure Social
Design Request Internal	Default		<a href="#">World</a>	Internal		<input type="checkbox"/>
Design Request	Default		<a href="#">World</a>			<input checked="" type="checkbox"/>

**Design Request**

**Title**  
Additional configuration suggest

**Description**

---

**Creator Info**  
Created\_On: 3/7/2019 12:21:20 PM  
Creator: Innovator Admin

**Cost** **Patent?** **Completion Date**

**Classification**  
Internal

**State**  
New

**Department Number**

**Design Request**

**Title**  
Additional configuration suggest

**Description**

---

**Creator Info**  
Created\_On: 3/7/2019 12:21:20 PM  
Creator: Innovator Admin

**Cost** **Patent?** **Completion Date**

**Classification**  
External

**Customer**  
Wal-Mart

**Discussion**  
Enter a comment...  
Use @ to mention people  
Attach World Comment

Innovator Admin Today at 5:00 PM  
Action: Update

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## Configuring Comment and Sidebar Visibility.

The Visual Collaboration sidebar and Discussion Panel can be hidden from view for certain users. Each Form View on an ItemType has a Secure Social setting (boolean) which indicates when to show the sidebars.

In this example, Design Requests that are classified as Internal will not have access to the Visual Collaboration features.



### Try it... Configure Comment Visibility

1. Return to the Design Request ItemType and make sure it is locked.
2. Select the Views relationship tab and locate the View named Design Request Internal.
3. Uncheck the Secure Social checkbox.
4. Save changes to the ItemType.
5. Edit (or create a new) Design Request and classify the item as Internal.
6. Save and close the request. When you reopen the request the Sidebar and Discussion Comments are no longer available.

## Configuring Forum Options

- View Items associated with the Forum
- View Forum Saved Searches
- View/Add Identities that share this Forum
- View Identities that subscribe to this Forum
- View/Add Identities that must follow this Forum
- Deactivate a Forum
- Delete a Forum



## Configuring Forum Options

Forums allow an end user to follow discussions based on saved searches, associated items and included identities.


Several configuration options allow an administrator to:

- Monitor (or remove) items associated with a forum.
- Monitor (or remove) saved searches associated with a forum.
- View, add or remove identities that are participating in a forum.
- View, add or remove identities that must follow a forum.
- Deactivate and/or delete a forum.

## Editing a Forum

▼ Secure Social

Forums




**Forum Name**

**Label**

**Description**

**Forum Type**

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## Editing a Forum

Forum items can be modified by an administrator to customize reconfigure standard options.



### Try it... Edit a Forum














1. Select Administration -> Secure Social -> Forums from the TOC.
2. Locate and edit the forum labeled Key Documents.

## Exploring Forum Options

### View Forum Items

ForumItem	ForumMessageGroup	ForumSearch	Shared With	Want View By	Must View By
Actions	No Related				
Item Type	Item Config Id	Item Keyed Na...	Is Board Only		
Document	BC4C66CE0CCF4...	MP2954-DOC-2	<input type="checkbox"/>		
Document	9E893175E9644...	MP0101-DOC-2	<input type="checkbox"/>		

### View Forum Saved Searches

ForumItem	ForumMessageGroup	ForumSearch	Shared With	Want View By	Must View By			
Actions ▾	Pick Related ▾	         	Hide Search Criteria ▾			  		
Label	ItemType ▲	SearchMode...	Criteria [...]	Location	Auto Saved	Show on TOC	Description	Is Board Only
Excel Documents	Document	Simple	<Item type="Do...	Main Grid	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>



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## Exploring Forum Options

### ForumItem

Display individual items that have been associated to this forum by an end user.

### ForumMessageGroup

Reserved for AML expressions that include messages in a forum based on custom criteria.

### ForumSearch

Display item saved searches that have been associated to this forum by an end user.

## Exploring Forum Options

### ▪ View Share Identities

ForumItem ForumMessageGroup ForumSearch **Shared With** Want View By Must View By

Actions ▾ No Related ▾ + - X Excel Word Lock Unlock Refresh Undo Redo [H]

shared\_with\_id...

World

### ▪ View Identity Subscribers

ForumItem ForumMessageGroup ForumSearch Shared With **Want View By** Must View By

Actions ▾ No Related ▾ + - X Excel Word Lock Unlock Refresh Undo Redo [H]

want\_view\_id [...]

Mike Miller

Terry Adams

Aaron Lee

Diane Prescott

Innovator Admin

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## Exploring Forum Options

### Shared With

Displays the identities that user(s) have shared this forum with.

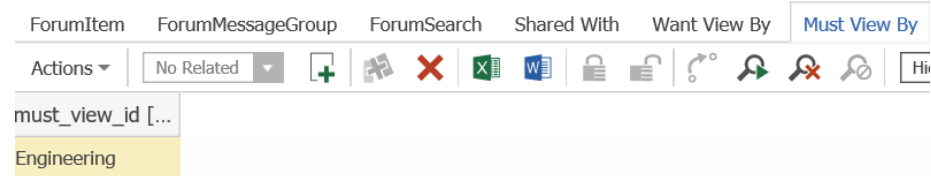
### Want View By

Displays the users that have subscribed to this forum.

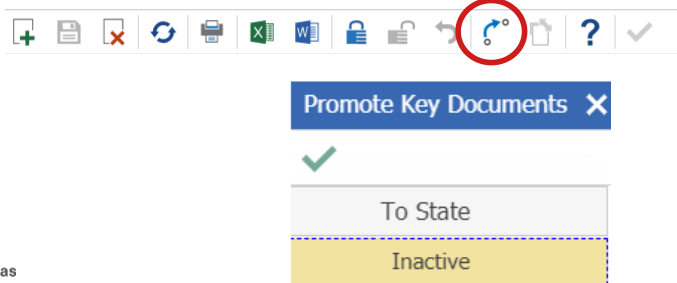


## Exploring Forum Options

### ▪ Add Must Follow Identities



### ▪ Deactivate Forum



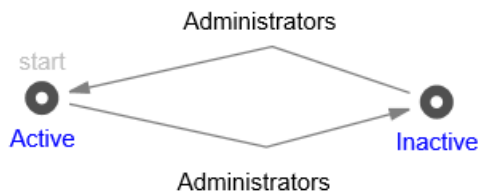
## Exploring Forum Options

### Must View Buy

Allows an administrator to add identities that are required to follow this forum in the My Discussions panel.

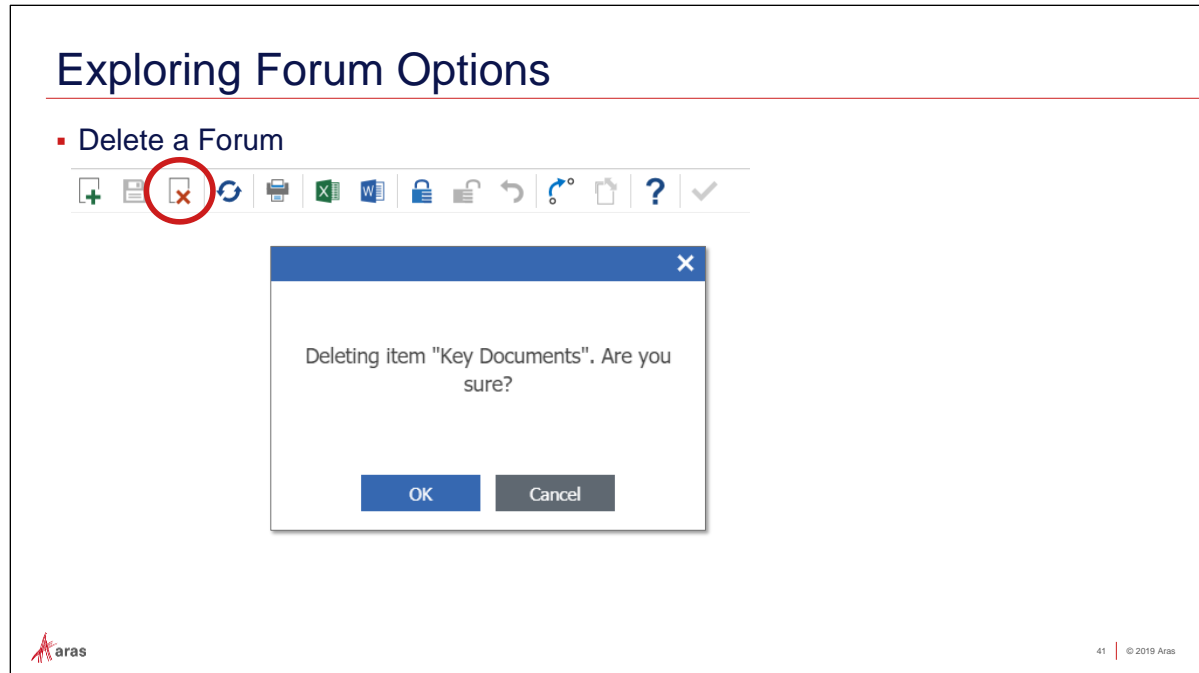
### Deactivate a Forum

Forum items are associated with the following Life Cycle:



This allows a member of the Administrators Identity to promote a forum to Inactive. Comments from an inactive forum are not included in the My Discussion panel.

Reactivating the forum at a later date displays any new or existing comments made by forum members.



## Exploring Forum Options

### Delete a Forum

An administrator can remove a forum permanently from the database. The configuration settings of the forum are no longer available and users will not see messages associated with this forum in the My Discussions panel.

**Viewing User Preferences**

**Preference** **Identity Id**  
Innovator Admin

**Secure Social**

**Default bookmark**  
▼

**Default Number Of Replies**  
3

**Default Number Of Flagged-By Users**  
2

**Max Lines In Messages Before "More"**  
3

☒ Use Standard Toolbar For Viewers  
☐ Use Legacy 3D View Files

**Message Notification**  
☒ Within the web client  
☐ Email on every message  
☒ Email digest

**Prefix Text For Highlight Text Markup**  
Change to:

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## Viewing User Preferences

User Preferences are also available for each Identity. These preferences allow you to set default behaviors for several Visual Collaboration features.

### Default Bookmark

Bookmarks to show by default in the My Discussions.

### Default Number of Replies

Maximum number of replies to show in a discussion thread.

### Default Number Of Flagged By Users

Maximum number of user names to show by default.

### Max Lines in Messages before "More"

Max number of comments lines to show in discussion thread before user has to click "More" link.

### Use Standard Toolbar for Viewers

Use Standard Toolbar as default when opening viewer.

### Use Legacy 3D Files

Support older file format for 3D images.

### Message Notification

Determine how often internal and email notifications should be sent.

### Prefix Text

Default text for markup editing.



## **Try it... View User Preferences**

1. Select Administration -> Preferences from the TOC.
2. Open the Preference item associated with the Innovator Admin Identity for view.
3. Select the Secure Social relationship tab to view the preference settings.



## Summary

In this unit, you learned about how to enable the features included in Visual Collaboration on any ItemType.

You should now be able to:

- ✓ Demonstrate the Standard Features of Visual Collaboration
- ✓ List the Visual Collaboration Templates
- ✓ Enable Visual Collaboration on an ItemType
- ✓ Configure a Discussion Template
- ✓ Create a Message Feeds
- ✓ Include Viewer FileTypes using a FileSelector Template
- ✓ Modify the Sidebar Style
- ✓ Configure Comment and Sidebar Visibility
- ✓ Configure Discussion Forum Options
- ✓ View User Preferences