Examples

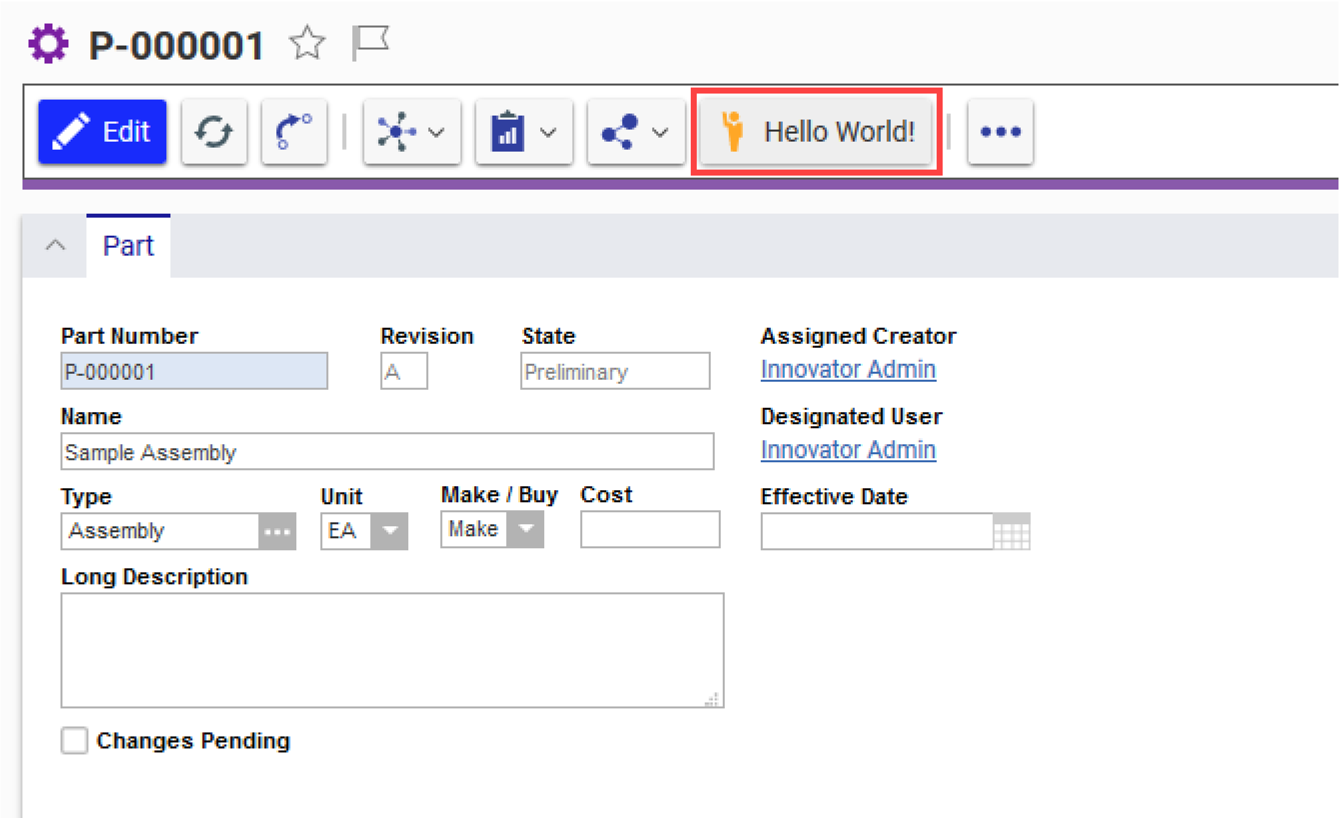
Important

Because many of the standard UI elements in the Aras Innovator web client are defined via CUI, it's important to back up your database before changing any of the out of the box controls.

Toolbars

Add a button to an item toolbar

"I want to add a button to the Part item toolbar for all users."



A custom button appears in the Part item toolbar

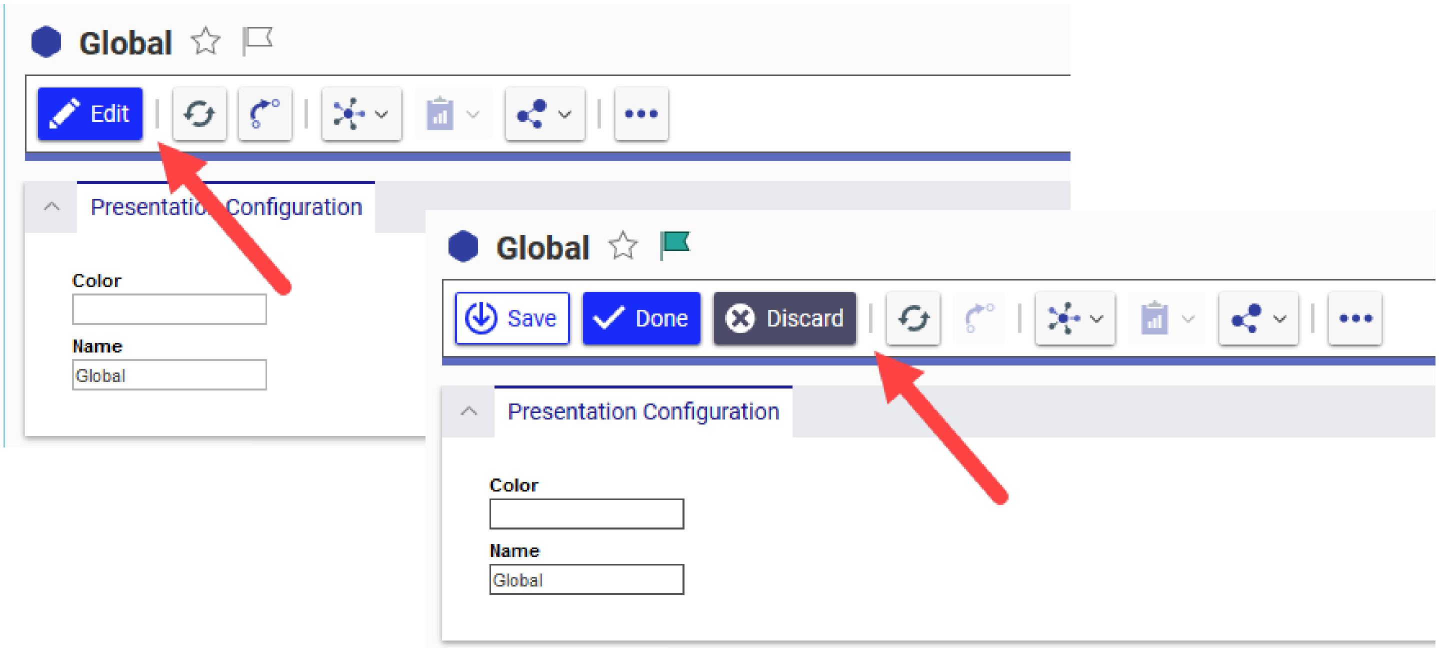
Important

This section demonstrates how to add a Command Bar Item to the Item View toolbar for a specific ItemType. See the “Add a separator to a toolbar” section for steps to add a Command Bar Item to the Item View toolbar for all ItemTypes.

1. Open the **Part** ItemType and select the **Client Style** relationship tab.
2. Right click the entry in the grid and select **Open** to open the Presentation Configuration for the Part ItemType.
3. Click the **Edit** button.
4. Click the **New** button in the Command Bar Section grid to create a new section with the following properties:
    1. Classification: **Data Model**
    2. Name: Part_Custom_Buttons
    3. Location: ItemView.ItemCommandBar
    4. Sort Order: **256**
    5. For Identity: **World**
5. Click the **Save** button, then right click the new Command Bar Section, and select **Open**.
6. Click the **Edit** button.
7. Click the **New** button in the Command Bar Item grid, then select **Button > OK** in the dialog to create a new button with the following properties:
    1. Name: My_Button
    2. Sort Order: **2000**
    3. Action: **Add**
    4. For Identity: **World**
8. Click **Save**, then right click the new Button, and select **Open**.
9. Click the **Edit** button.
10. Set the following properties on the item form:
    1. Label: **enter the label** you want to appear on the button
    2. Click Method: **choose a Method** you want to execute when the button is clicked
    3. Image: **choose an icon** to display in the button
11. Click **Save**, then navigate to **Design > Parts** in the TOC.
12. Open a Part item to see the new button in the toolbar.

Add a separator to all item toolbars

“I want to add a separator before the Refresh button in the toolbar for all ItemTypes and users.”



A custom separator appears before the refresh button in all item toolbars

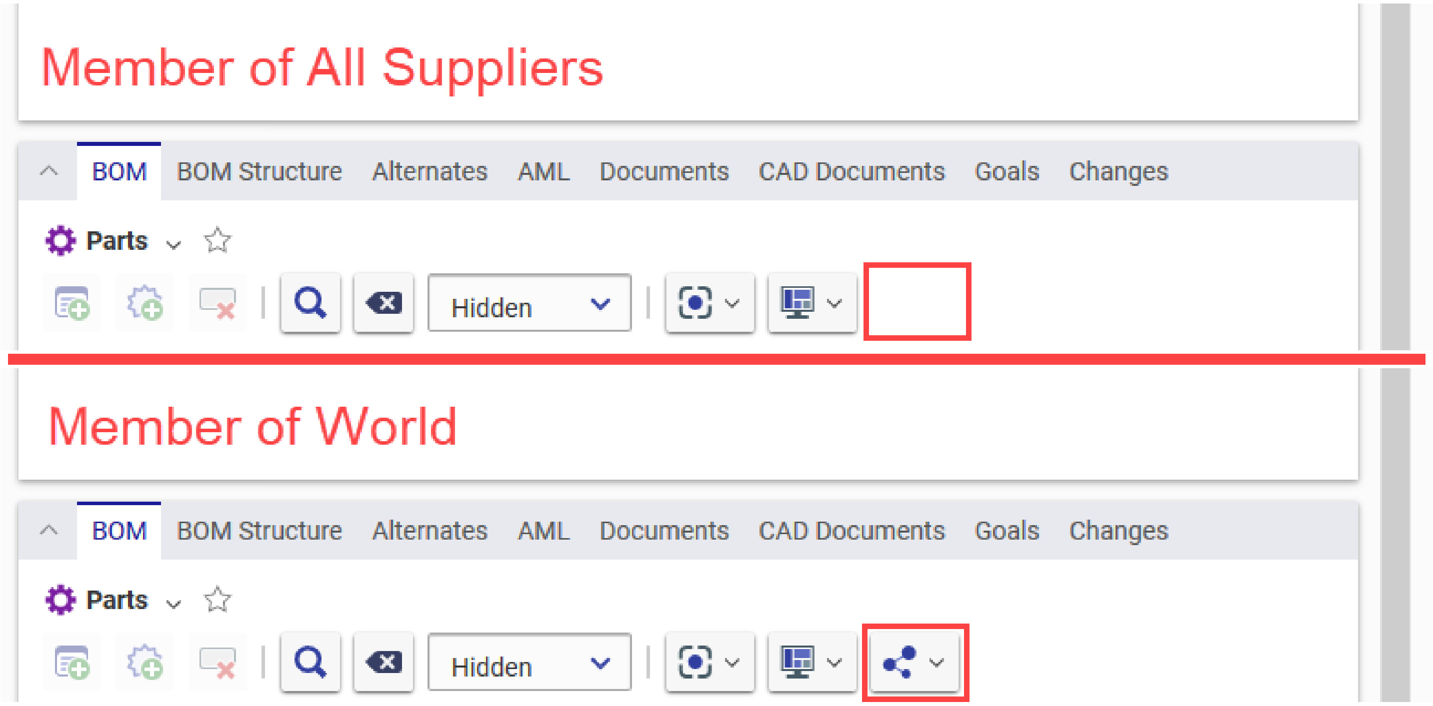
Important

This section demonstrates how to add a Command Bar Item to the Item View toolbar for all ItemTypes. See the “Add a button to a toolbar” section for steps to add a Command Bar Item to the Item View toolbar for a specific ItemType.

1. Navigate to **Administration > Configuration > Client Presentation** in the TOC.
2. Click the **Search** button to run the Client Presentation search.
3. Click the **Global** item property in the single search result.
4. In the Command Bar Section grid, open the **itemview.itemcommandbar.default** item.
5. Click the **Edit** button.
6. Click the **New** button in the Command Bar Item grid, then select **Separator > OK** in the dialog to create a new separator with the following properties:
    1. Name: **My_Separator**
    2. Sort Order: **500**
    3. Action: **Add**
    4. For Identity: **World**
7. Click the **Save** button.
8. Open any item to see the new separator appear before the Refresh button in the toolbar.

Remove a button on a relationship toolbar

“I want to hide the Share button on the Part BOM relationship toolbar for members of All Suppliers.”



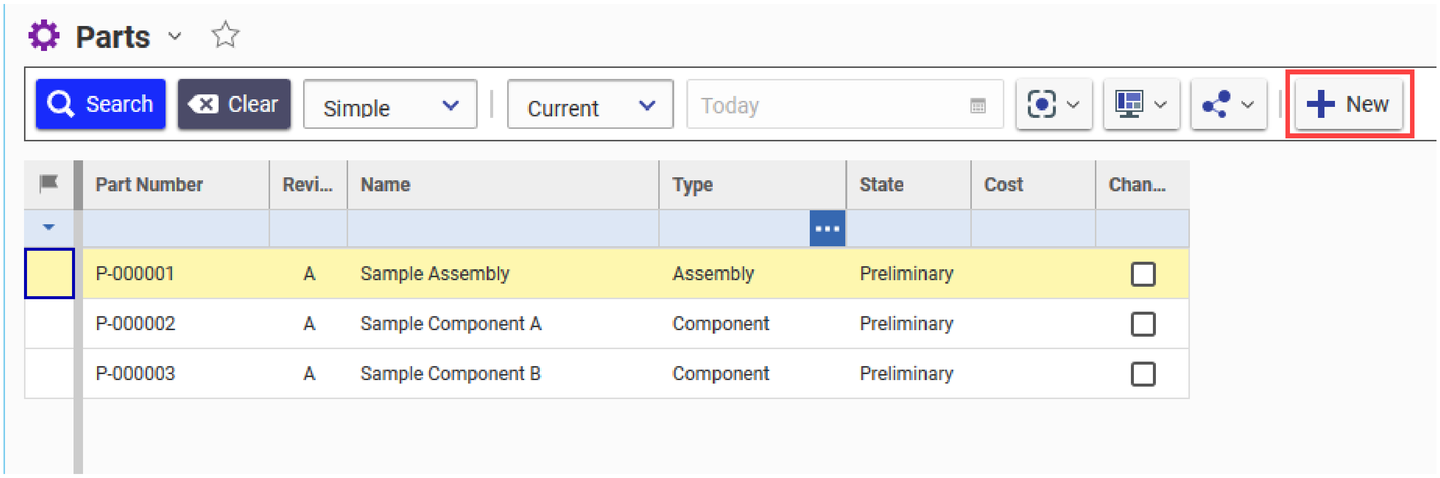
The default “share” button does not appear on Part BOM for All Suppliers

1. Open the **Part BOM** ItemType and click the **Edit** button.
2. In the **Client Style** relationship tab, click the **New** button to create a new Presentation Configuration with the following properties:
   Name: **Part_BOM**
3. Click the **Save** button, then right click the new Presentation Configuration, and select **Open**.
4. Click the **Edit** button.
5. Click the **New** button in the Command Bar Section grid to create a new section with the following properties:
   1. Classification: **Data Model**
   2. Name: **Part_BOM_Custom**
   3. Location: **ItemView.RelationshipsCommandBar**
   4. Sort Order: **128**
   5. For Identity: **All Suppliers**
6. Click the **Save** button, then right click the new Command Bar Section, and select **Open**.

7. Click the **Edit** button.
8. Click the **Add** button in the Command Bar Item grid, then search for the **commonitems.commandbar.sharemenu** item. Click **OK** in the search dialog to add the item to the Command Bar Items grid.
9. Set the following properties for the Command Bar Item:
    1. Action: **Remove**
    2. For Identity: **All Suppliers**
10. Click **Save**, then logout of Aras Innovator.
11. Login to Aras Innovator as a member of the All Suppliers group identity.
12. Open a Part item to see that the Share button no longer appears in the Part BOM relationship toolbar.

Replace a button on a toolbar

“I want to replace the default “New” button with a custom button on the Part search toolbar for all users.”



The default “new” button is replaced with a custom button in the search toolbar.

1. Open the **Part** ItemType and select the **Client Style** relationship tab.
2. Right click the entry in the grid and select **Open** to open the Presentation Configuration for the Part ItemType.
3. Click the **Edit** button.
4. Click the **New** button in the Command Bar Section grid to create a new section with the following properties:
    1. Classification: **Data Model**

2. Name: **Part_Search_Custom_Buttons**
    3. Location: **SearchView.CommandBar**
    4. Sort Order: **512**
    5. For Identity: **World**
5. Click the **Save** button, then right click the new Command Bar Section, and select **Open**.
6. Click the **Edit** button.
7. Click the **Add** button in the Command Bar Item grid, then search for the **searchview.commandbar.default.new** item. Click **OK** in the search dialog to add the item to the Command Bar Items grid.
8. Set the following properties for the Command Bar Item:
    1. Sort Order: **2000**
    2. Action: **Replace**
    3. For Identity: **World**
9. Click **Save**, then right click the Button, and select **Open**.
10. Click the "**…**" button in the toolbar and select **Create New Button** to create a new Button with the following properties:
    1. Name: **My_New_Button**
    2. Label: **New**
    3. Tooltip Template: **New {0}**
    4. Init Method: **cui_svcb_new_init**
    5. Click Method: **cui_ivicb_more_new_click**
    6. Image: **choose an icon** to display in the button
11. Click **Save**, then navigate back to the **Part_Search_Custom_Buttons** Command Bar Section tab.
12. In the Alternate property of the **searchview.commandbar.default.new** Command Bar Item relationship, enter **My_New_Button**.
13. Click **Save**, then navigate to **Design > Parts** in the TOC to see the custom "New" button in the search toolbar.

Menus

Add a button to a menu

"I want to add an action to the global user menu for all administrators."

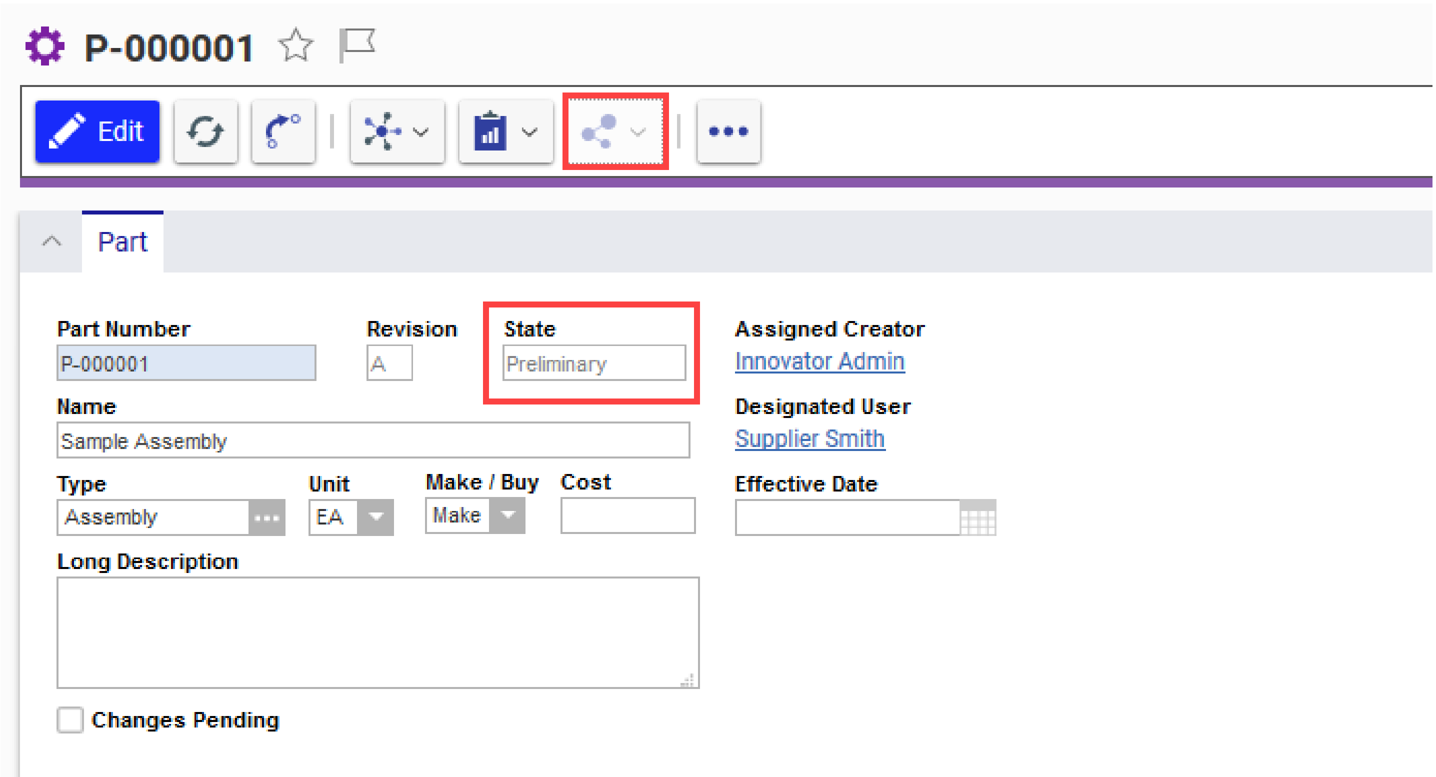
A new action appears in the user menu for administrators

1. Navigate to **Administration > Configuration > Client Presentation** in the TOC.
2. Click the **Search** button to run the Client Presentation search.
3. Click the **Global** item property in the single search result.
4. In the Command Bar Section grid, open the **com.aras.innovator.cui_default.mwh_header_user_menu** item with the MainWindowHeader location.
5. Click the **Edit** button.
6. Click the **New** button in the Command Bar Item grid, then select **Menu Button > OK** in the dialog to create a new menu button with the following properties:
    1. Name: **My_Custom_Admin_Action**
    2. Sort Order: **3100**
    3. Action: **Add**
    4. For Identity: **Administrators**
7. Right click the new button row and select **Open**.
8. Enter the following properties for the new Menu Button:
    1. Label: **My Admin Action**
    2. Parent Menu: **com.aras.innovator.cui_default.mwh_user_menu**
    3. Click Method: **select a Method** you want to run when the button is clicked
9. Click the **Save** button and close the Menu Button tab.

10. Click the **Save** button in the Command Bar Section tab.
11. Logout of Aras Innovator and log back in as a member of the Administrators identity.
12. Click the global user menu button in the top right corner of the window and select **My Admin Action** to run your custom action.

Disable a menu

"I want to disable the Share menu button for items that are not yet released."



The default "share" menu is disabled for non-released items

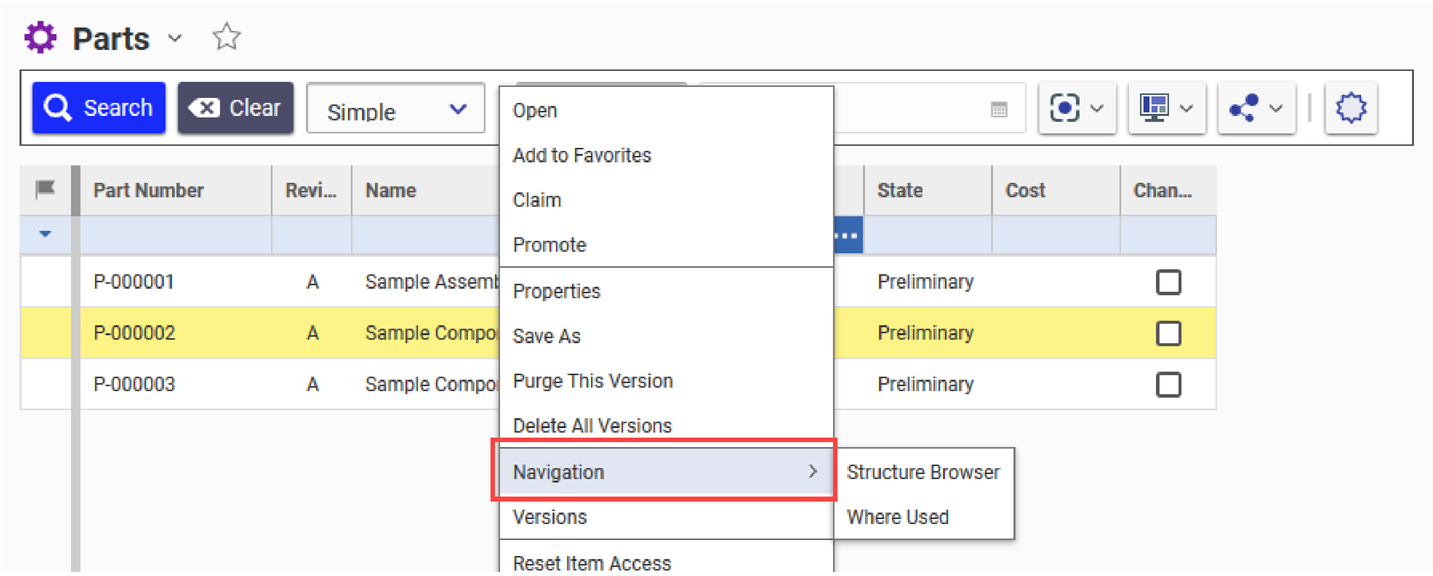
1. Navigate to **Administration > Configuration > Client Presentation** in the TOC.
2. Click the **Search** button to run the Client Presentation search.
3. Click the **Global** item property in the single search result.
4. In the Command Bar Section grid, open the **itemview.itemcommandbar.default** item.
5. In the Command Bar Item grid, open the **itemview.itemcommandbar.default.share** item.
6. Click the **Edit** button.
7. Replace the Init Method with a custom Method that contains the following code:

```
if (!options.eventState) {
options.eventState = aras.evalMethod('cui_reinit_calc_tearoff_states');
}
// get the release state of the context item
var contextItem = aras.getItemById(options.itemTypeName, options.itemId);
var isReleased = aras.getItemProperty(contextItem,'is_released','0');
// disable the menu when the item is not released
return {
'hidden': options.eventState.isNew,
'disabled': (isReleased === '0')
};
```

8. Click **Save** and close the Menu item.
9. Open any non-released item to confirm that the Share menu button is disabled. The button will be enabled for any released item.

Add a submenu to a menu

"I want to move 'Structure Browser' and 'Where Used' to a submenu of the main grid context menu."



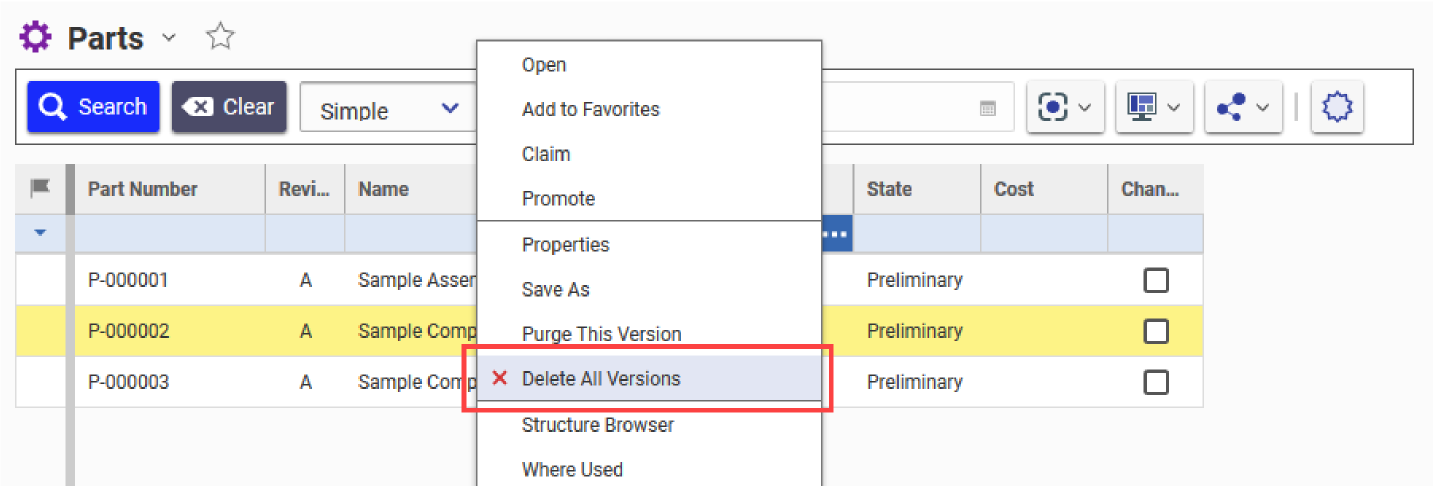
The default structure browser and where used actions appear in a new submenu

1. Navigate to **Administration > Configuration > Client Presentation** in the TOC.
2. Click the **Search** button to run the Client Presentation search.
3. Click the **Global** item property in the single search result.
4. In the Command Bar Section grid, open the **com.aras.innovator.cui_default.popup_menu_for_item_grid**item.

5. Click the **Edit** button.
6. Click the **New** button in the Command Bar Item grid, then select **Menu > OK** in the dialog to create a new menu button with the following properties:
    1. Name: **My_Nav_Menu**
    2. Init Method:**initPopupItemInItemsGrid**
    3. Sort Order: **1300**
    4. Action: **Add**
    5. For Identity: **World**
7. Right click the new button row and select **Open**.
8. Set the following properties:
   Label: **Navigation**
9. Click **Save** and close the new Menu tab.
10. Move the Structure Browser action to the new submenu:
    1. On the Command Bar Section form, open the **com.aras.innovator.cui_default.pmig_Structure Browser** Menu from the Command Bar Item grid.
    2. Click the **Edit** button.
    3. Set the Parent Menu property to **My_Nav_Menu**.
    4. **Save** and close the Structure Browser Menu item tab.
11. Move the Where Used action to the new submenu:
    1. On the Command Bar Section form, open the **com.aras.innovator.cui_default.pmig_Where Used** Menu from the Command Bar Item grid.
    2. Click the **Edit** button.
    3. Set the Parent Menu property to **My_Nav_Menu**.
    4. **Save** and close the Where Used Menu item tab.
12. Click the **Save** button for the Command Bar Section.
13. Open any search grid from the TOC and right click on a row to see the new “Navigation” submenu.

Display an icon on a menu button

“I want to show an icon next to the ‘Delete’ action in the main grid context menu.”



An icon appears next to the delete action in the main grid menu

1. Navigate to **Administration > Configuration > Client Presentation** in the TOC.
2. Click the **Search** button to run the Client Presentation search.
3. Click the **Global** item property in the single search result.
4. In the Command Bar Section grid, open the **com.aras.innovator.cui_default.popup_menu_for_item_grid** item.
5. Click the **Edit** button.
6. In the Command Bar Item grid, open the **com.aras.innovator.cui_default.pmig_Delete**item.
7. Click the **Edit** button.
8. Use the **Image** property to choose the icon you want to show in the menu.
9. Click **Save** and close the Menu item.
10. Click **Save** and close the Command Bar Section item.
11. Open any search grid from the TOC and right click on a row to see your selected icon appear next to the “Delete All Versions” action.

Shortcuts

Add an item form keyboard shortcut

“I want a shortcut to allow users to create a new item from an item form.”

1. Navigate to **Administration > Configuration > Client Presentation** in the TOC.
2. Click the **Search** button to run the Client Presentation search.
3. Click the **Global** item property in the single search result.

4. In the Command Bar Section grid, open the **com.aras.innovator.cui_default.itemWindowShortcuts**item.
5. Click the **Edit** button.
6. Click the **New** button in the Command Bar Item grid, then select **Shortcut > OK** in the dialog to create a new keyboard shortcut with the following properties:
    1. Name: **New_Item**
    2. Sort Order: **1024**
    3. Action: **Add**
    4. For Identity: **World**
7. Right click the new button row and select **Open**.
8. Set the Shortcut property to **alt+ctrl+n**.
9. Set the Handler property to a custom Method containing the following code:

```
var itemtype = window.itemTypeName;
if (itemtype) {
aras.uiNewItemEx(itemtype);
}
```

10. Click **Save** and close the new Shortcut tab.
11. **Save** and close the Command Bar Section tab.
12. Open an item, like a Part, and enter the keyboard shortcut **CTRL+ALT+N**. A new Part item will open in a new tab.

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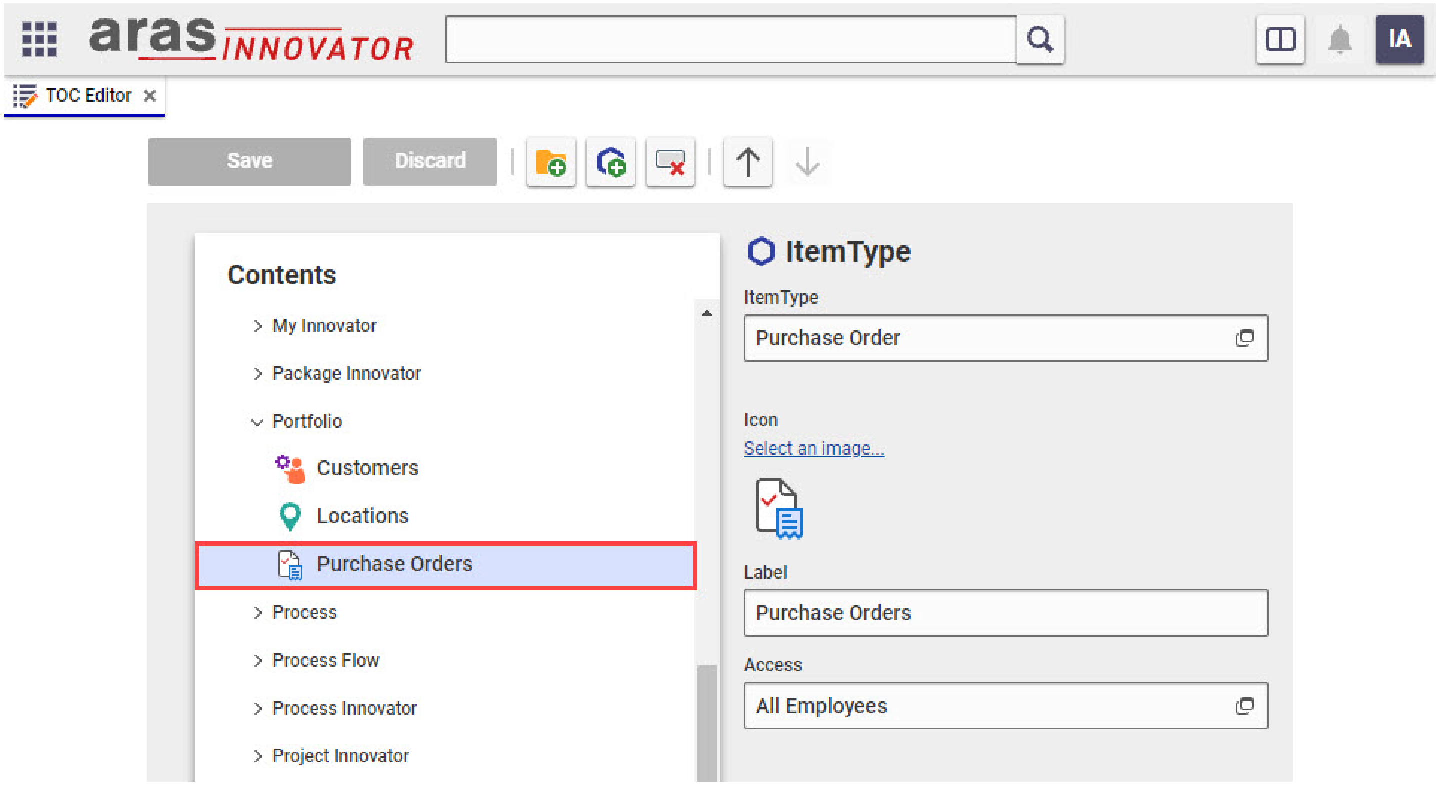
Add a new ItemType Button to the TOC

"I want the All Employees identity to see a TOC button for Purchase Orders."



Configuring a new button for the custom ItemType "Purchase Orders"

1. Navigate to **Administration > Configuration > TOC Editor** in the TOC.
2. Click the **Add ItemType** button in the toolbar.
3. In the search dialog, choose the ItemType you want to add and click **OK**.

Important

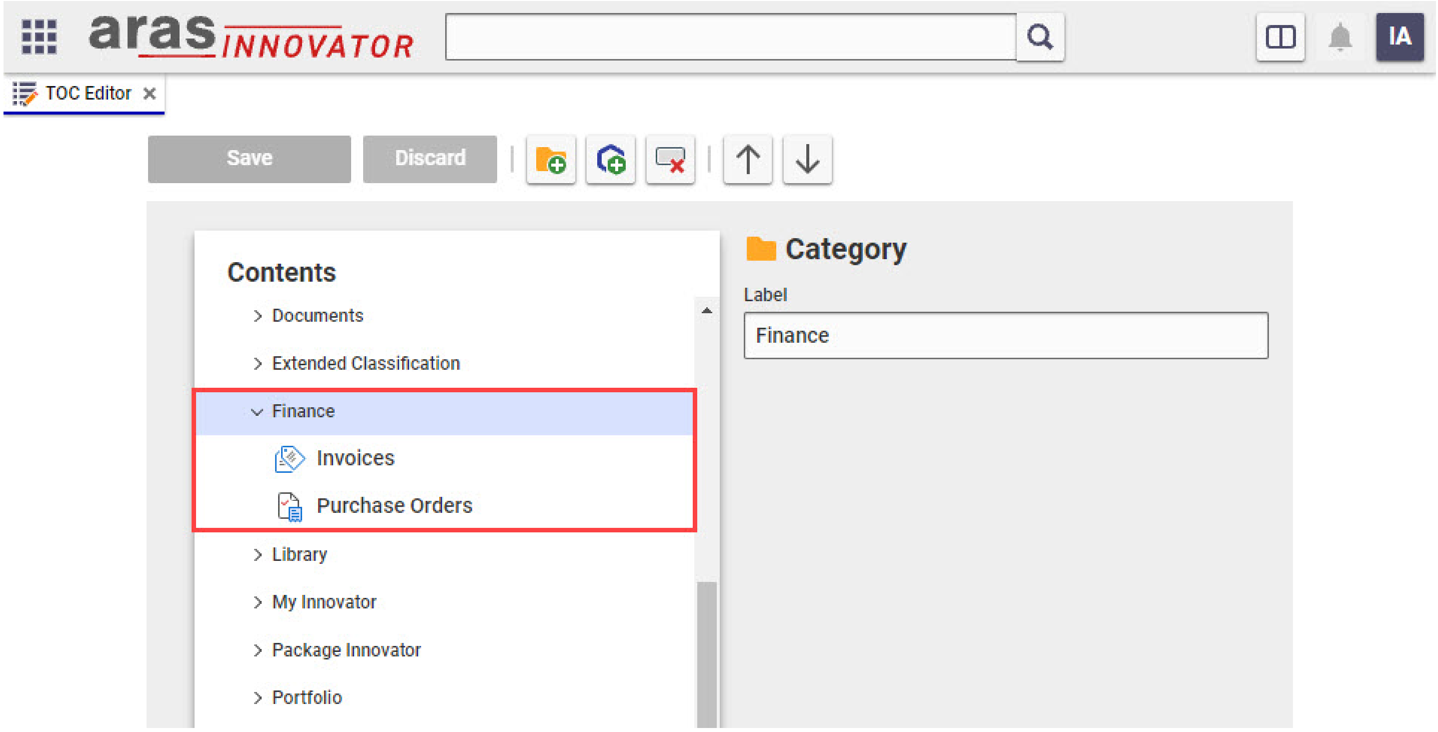
A new entry for your ItemType will appear in the Contents pane of the editor. If no categories were selected when you added the button, the new entry will appear at the bottom of the list. If a category was selected, the new entry will appear in that category.

4. In the righthand pane, you may customize any of the following properties:
    1. ItemType: This ItemType will appear in the navigation pane when a user clicks the button.
    2. Icon: This image is displayed as an icon on the button.
    3. Label: This multilingual property determines the button text.
    4. Access: This property determines which identity will see this button in the TOC. If you want multiple identities to see a button for this ItemType, pick a group identity that includes all the identities that should have access, or add a button for each identity.

5. If you want to change where the button appears in the TOC, you can drag and drop it to your preferred location. Alternatively, you can select the button and use the **Move Up**/**Move Down** buttons in the toolbar.
6. When you're finished making your changes, click **Save** and close the tab for the TOC Editor.

Add a new category to the TOC

"I want to add a 'Finance' category for my Invoices and Purchase Orders."



Adding a Finance category to group two custom ItemType buttons

1. Navigate to **Administration > Configuration > TOC Editor** in the TOC.
2. Click the **Add Category** button in the toolbar.

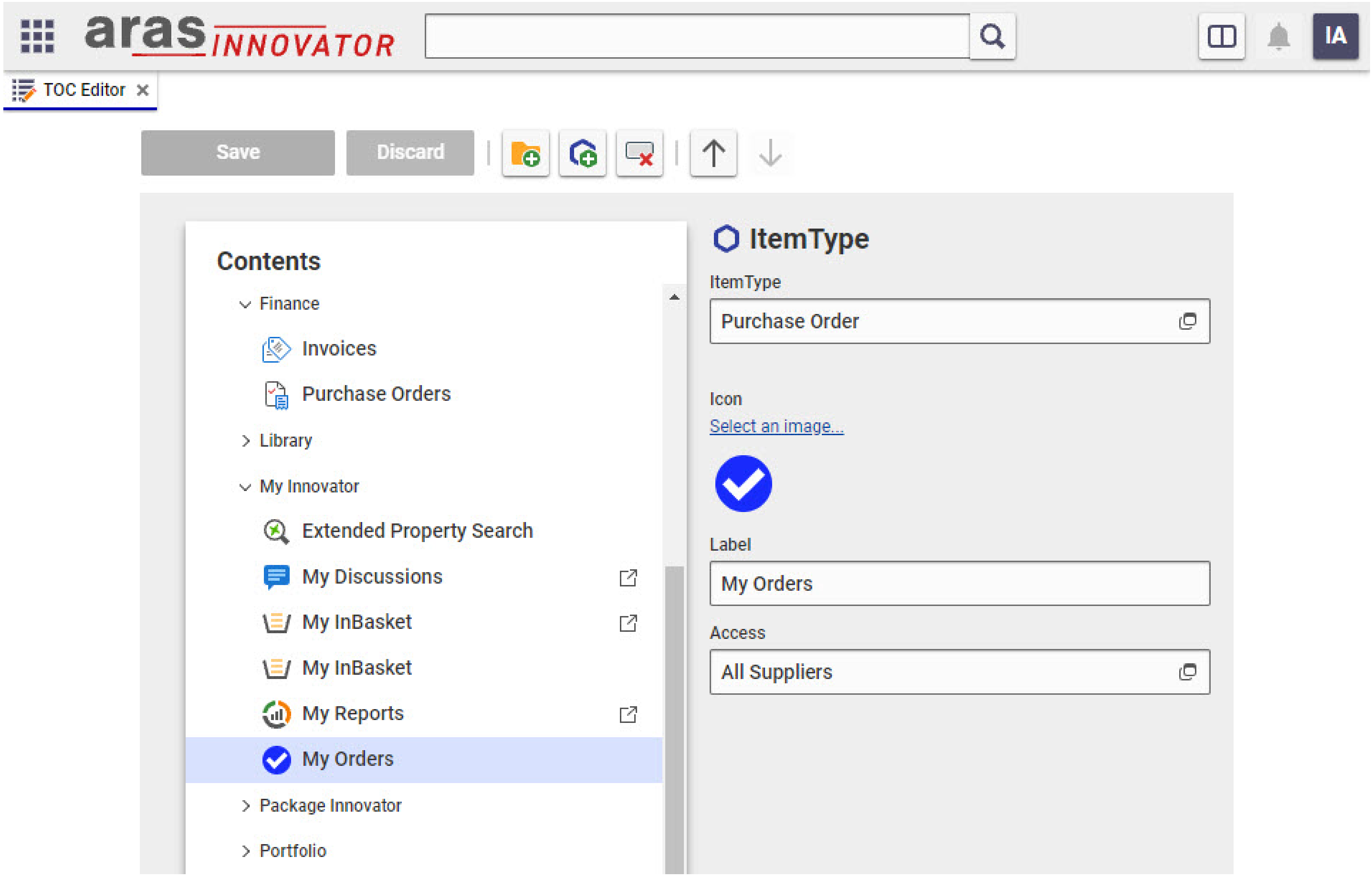
Important

A new category will appear in the Contents pane of the editor. If no existing categories were selected when you added the new category, the new entry will appear at the bottom of the list. If a category was selected, the new entry will appear in that category.

3. In the righthand pane, you can customize the multilingual **Label** property to set the category text.
4. If you want to change where the category appears in the TOC, you can drag and drop it to your preferred location in the Contents pane. Alternatively, you can select the category and use the **Move Up**/**Move Down** buttons in the toolbar.
5. When you're finished making your changes, click **Save** and close the tab for the TOC Editor.

Set a custom button label and icon for a specific identity

"I want the All Suppliers identity to see a different label and icon for Purchase Orders."



Configuring a custom label and icon for All Suppliers' "Purchase Orders"

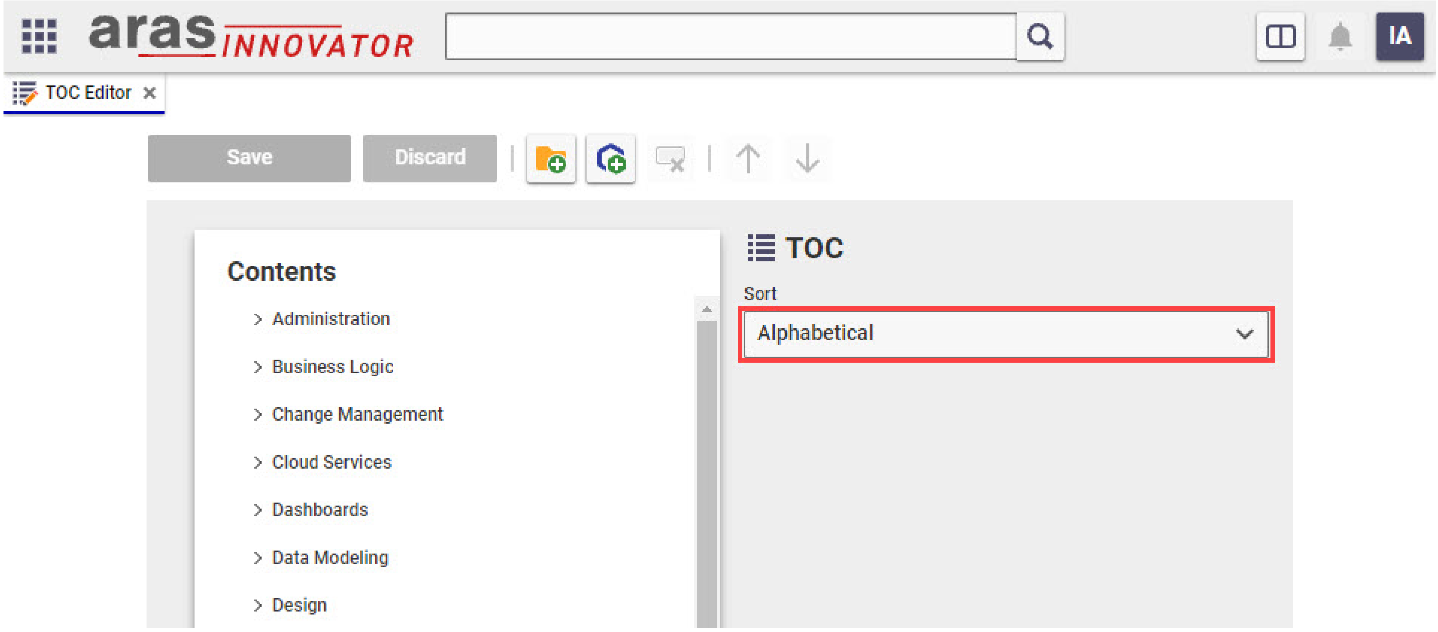
Important

The steps in this section are largely the same as section Toolbar Control “Add a new ItemType button to the TOC”. Here, we are adding two buttons with the same ItemType but different labels, icons, and access identities.

1. Navigate to **Administration > Configuration > TOC Editor** in the TOC.
2. Click the **Add ItemType** button in the toolbar.
3. In the search dialog, choose the ItemType you want to add and click **OK**.
4. In the righthand pane, you may customize the following properties or leave them set to their default values:
    1. **Icon**: This image is displayed as an icon on the button.
    2. **Label**: This multilingual property determines the button text.
    3. **Access**: This property determines which identity will see this button in the TOC. If you want multiple identities to see a button for this ItemType, pick a group identity that includes all the identities that should have access, or add a button for each identity.
5. If you want to change where the button appears in the TOC, you can drag and drop it to your preferred location. Alternatively, you can select the button and use the **Move Up**/**Move Down** buttons in the toolbar.
6. Repeat steps 2-5, choosing a different **Access** identity, **Icon**, and **Label** in step 4.
7. When you’re finished making your changes, click **Save** and close the tab for the TOC Editor.

Sort the TOC Buttons Alphabetically

“I want all TOC categories and buttons to display in alphabetical order.”



Configuring the TOC for alphabetical sort order

1. Navigate to Administration > Configuration > TOC Editor in the TOC.
2. In the righthand pane, set the Sort property to *Alphabetical*.

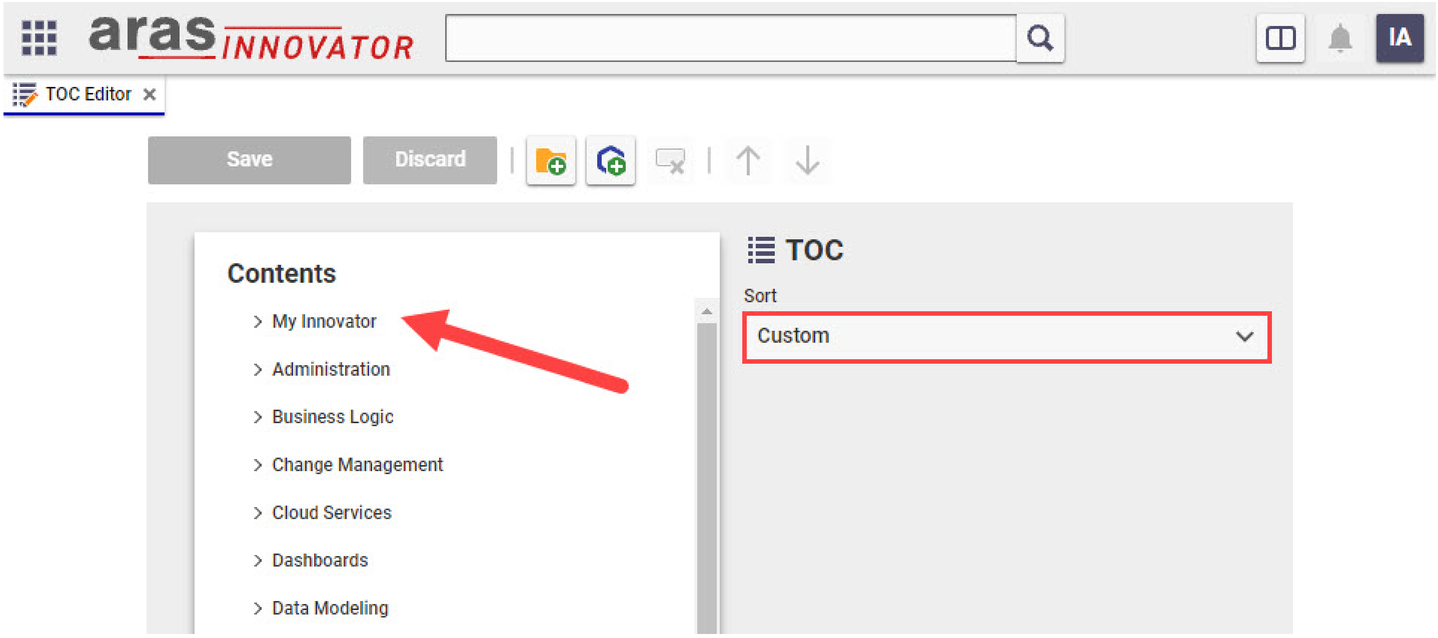
Important

The TOC sort order is set to Alphabetical by default.

3. When you're finished making your changes, click Save and close the tab for the TOC Editor.

Arrange the TOC Buttons in a Custom Order

"I want the 'My Innovator' category to appear at the top of the TOC."



Configuring the TOC for a custom sort order

1. Navigate to **Administration > Configuration > TOC Editor** in the TOC.
2. In the righthand pane, set the Sort property to *Custom*.

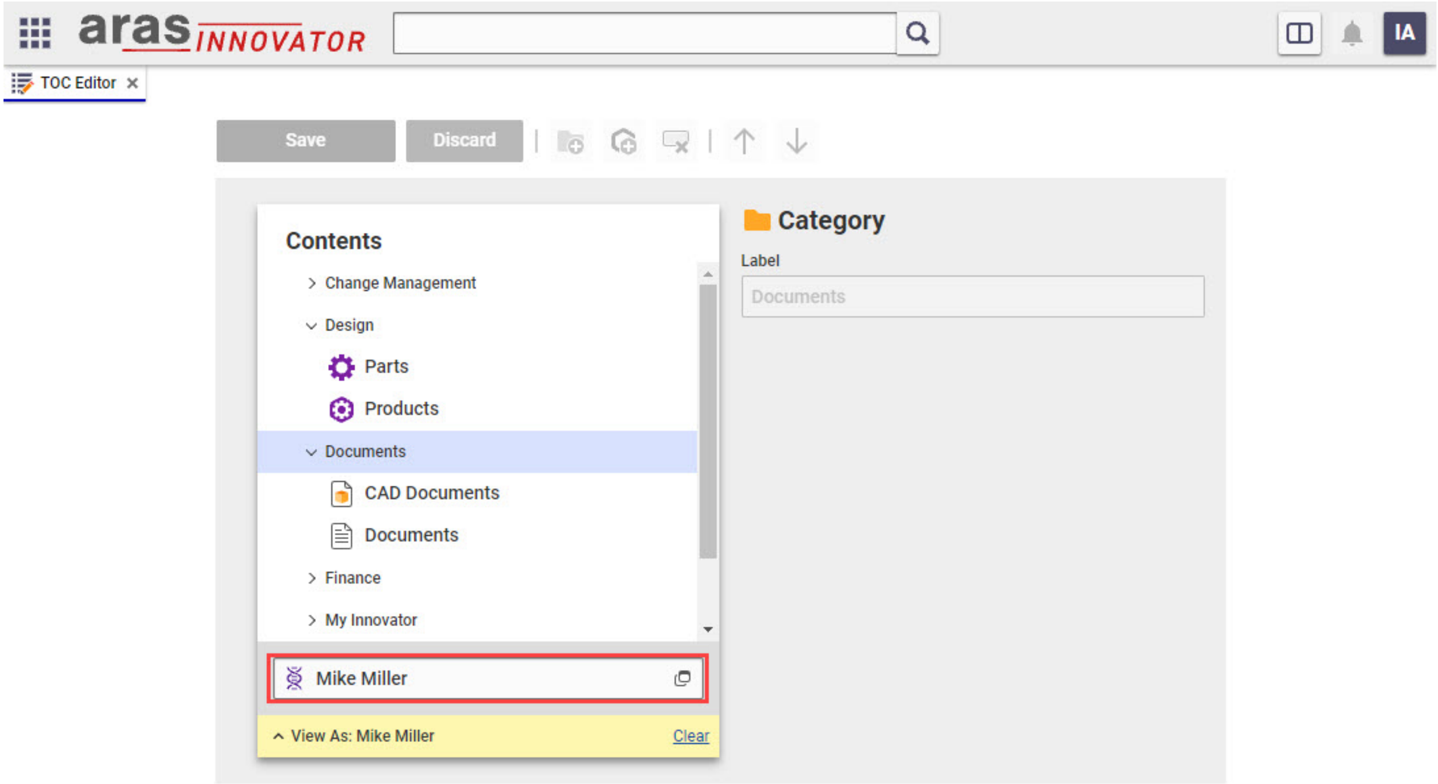
Important

The TOC sort order is set to Alphabetical by default.

3. When you're finished making your changes, click Save and close the tab for the TOC Editor.

View the TOC for a Specific Identity

"I want to see what the TOC looks like for user Mike Miller."



Viewing the content for Mike Miller's TOC

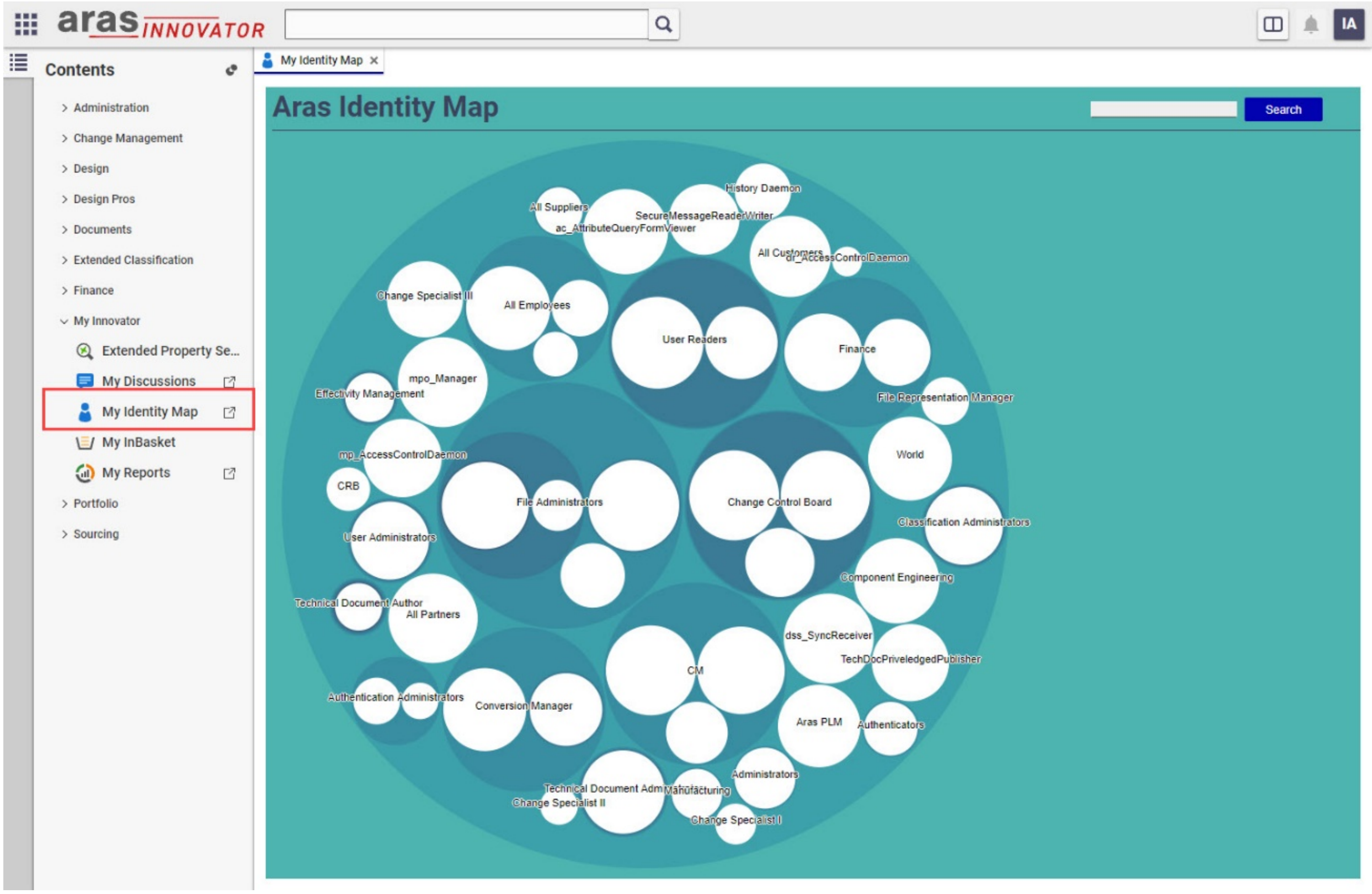
1. Navigate to **Administration > Configuration > TOC Editor** in the TOC.
2. Click View As at the bottom of the contents pane.
3. Enter or search for an identity in the Identity field. This can be a group identity like "All Employees" or an alias identity for a user like "Innovator Admin".
4. The contents pane will now display the TOC for your chosen identity. When you are done viewing the content, click **Clear** to exit viewing mode.

Important

Viewing mode is read-only. To make edits to the TOC, you must clear the View As field.

Display a Form with a TOC Button

"I want the user to see a special form when they click a button in the TOC."



The user clicks "My Identity Map" to see an interactive graph in a custom form

1. Navigate to **Administration > Configuration > TOC Editor** in the TOC.
2. Click the **Add Form** button in the toolbar.
3. In the search dialog, choose the Form to display and click **OK**.
4. In the righthand pane, you may customize the following properties or leave them set to their default values:
    1. **Icon**: This image is displayed as an icon on the button.
    2. **Label**: This multilingual property determines the button text.
    3. **Access**: This property determines which identity will see this button in the TOC. If you want multiple identities to see a button for this ItemType, pick a group identity that

includes all the identities that should have access, or add a button for each identity.

5. If you want to change where the button appears in the TOC, you can drag and drop it to your preferred location. Alternatively, you can select the button and use the **Move Up**/**Move Down** buttons in the toolbar.

Display an HTML Page with a TOC Button

"I want the user to see an HTML page when they click a button in the TOC."

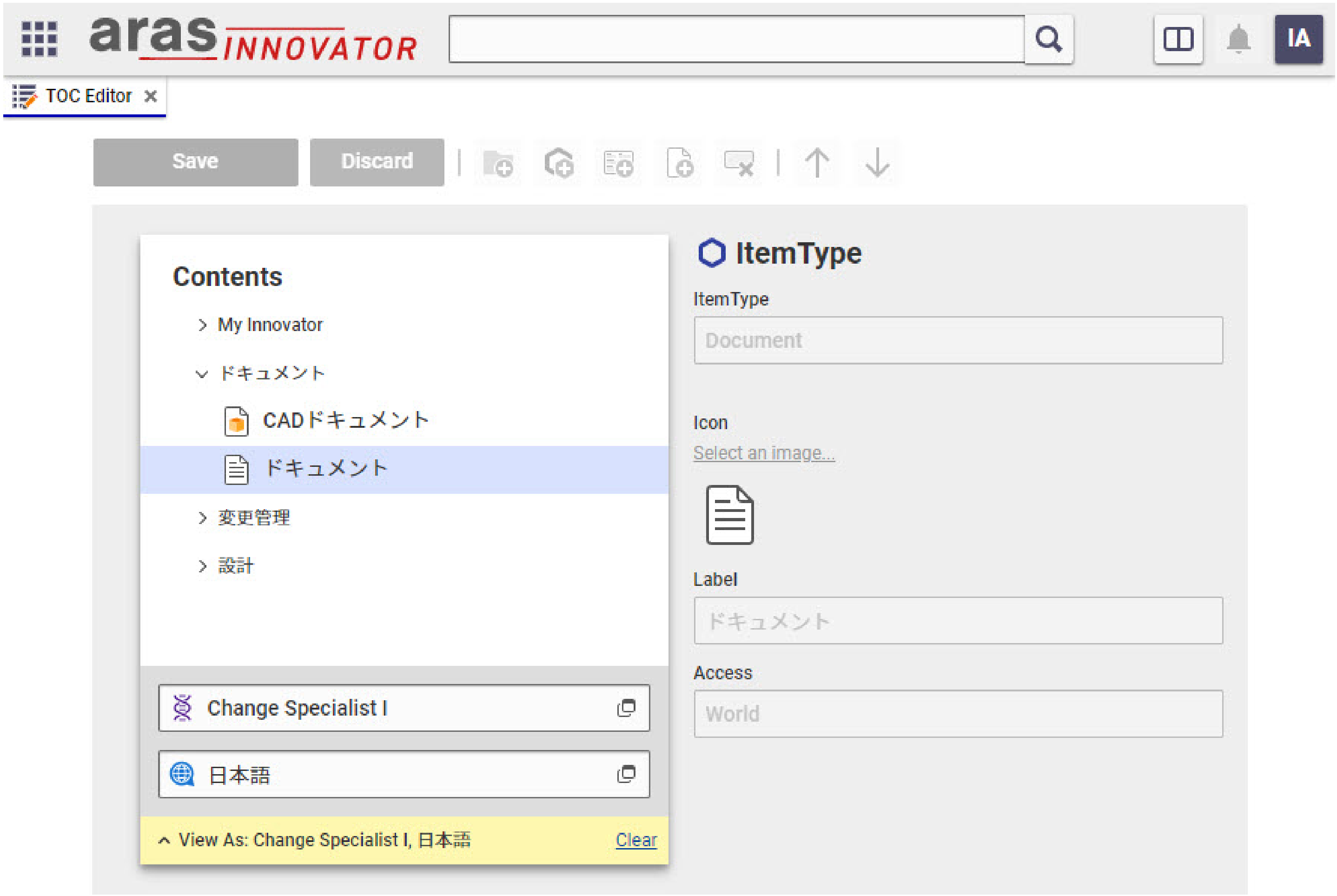
The user clicks "My Dashboard" to see a graph in a custom HTML page

1. Navigate to **Administration > Configuration > TOC Editor** in the TOC.
2. Click the **Add Page** button in the toolbar.

3. In the righthand pane, you may customize the following properties or leave them set to their default values:
    1. **Start Page:** Specifies the path of an HTML page to display when the button is clicked. This should be an HTML file in the code tree, and the path should be relative to the *Innovator/Client/scripts* directory.
    2. **Parameters:** Optional. Passes parameters for the HTML page to use.
    3. **Icon**: This image is displayed as an icon on the button.
    4. **Label**: This multilingual property determines the button text.
    5. **Access**: This property determines which identity will see this button in the TOC. If you want multiple identities to see a button for this ItemType, pick a group identity that includes all the identities that should have access, or add a button for each identity.
4. If you want to change where the button appears in the TOC, you can drag and drop it to your preferred location. Alternatively, you can select the button and use the **Move Up**/**Move Down** buttons in the toolbar.

View the TOC in a Specific Language

"I want to see what the TOC looks like for a Change Specialist I member in Japan."



Viewing the content for Mike Miller's TOC

1. Navigate to **Administration > Configuration > TOC Editor** in the TOC.
2. Click View As at the bottom of the contents pane.
3. Enter or search for an identity in the Identity field. This can be a group identity like "All Employees" or an alias identity for a user like "Innovator Admin".
4. The contents pane will now display the TOC for your chosen identity.
5. Enter or search for a language in the Language field.
6. The contents pane will now display the identity's TOC content in the specified language. When you are done viewing the content, click **Clear** to exit viewing mode.

Important

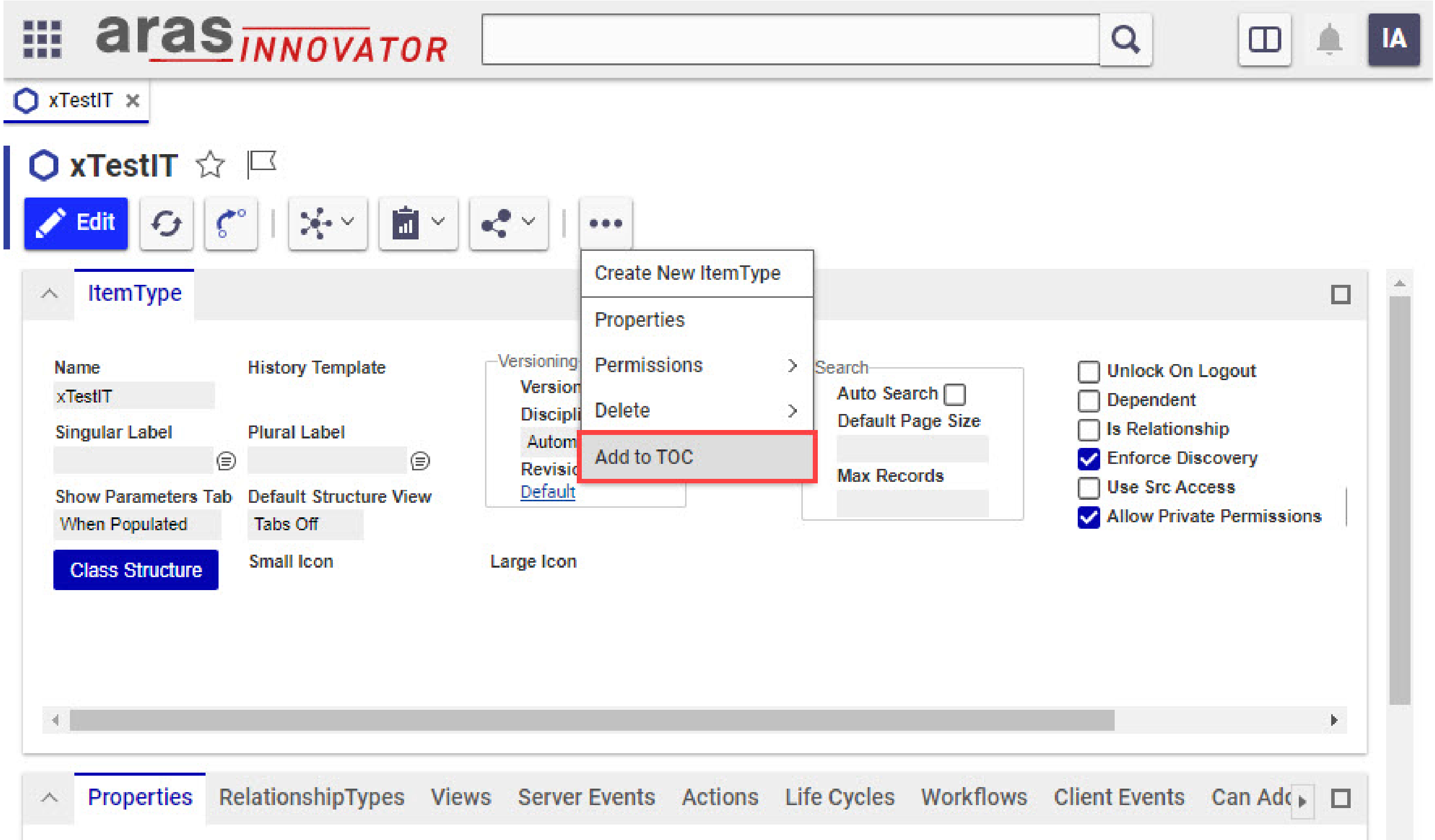
Viewing mode is read-only. To make edits to the TOC, you must clear the View As field.

Important

The Language filter will be enabled only when an Identity is specified and there are two or more languages configured in the Aras Innovator database. For more details on configuring Aras Innovator for multiple languages, please refer to the Configuring Internationalization documentation.

Add a Button to the TOC from an ItemType

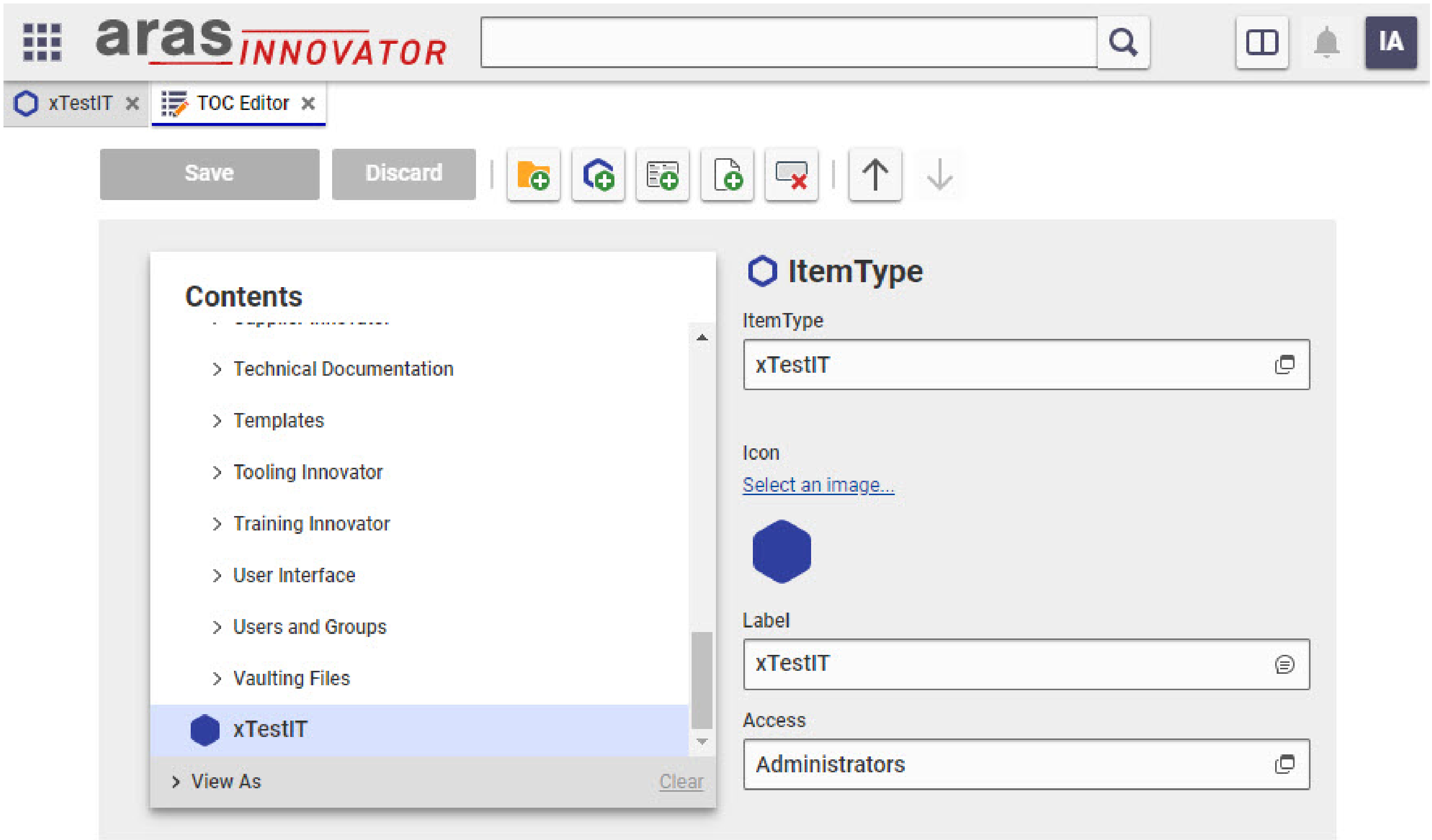
“I want to quickly add a new TOC button while defining my ItemType.”



Quickly create a new TOC button with the “Add to TOC” action

1. If the ItemType isn’t already open:
   1. Navigate to **Administration > ItemTypes** in the TOC.
   2. Search for the ItemType you want to work with.
   3. Double click the ItemType in the grid to view it.

2. Select the **'…'** button from the ItemType toolbar and click **Add to TOC**. This action will create a new ItemType button in the TOC with the following settings:
    1. ItemType: Current **ItemType**
    2. Icon: **Small Icon** of the ItemType
    3. Label: **Plural Label** of the ItemType (or ItemType name if no plural label is defined)
    4. Access: **Administrators**
3. To see the new TOC button, navigate to the TOC and scroll to the bottom. This is the default location for new buttons added via the **Add to TOC** action.
4. To change the default settings for the new TOC button, navigate to **Administration > Configuration > TOC Editor** in the TOC.
5. Scroll to the bottom of the contents pane and select the new ItemType button.



Default settings for a button created from the xTestIT ItemType

6. Change any default settings as needed.

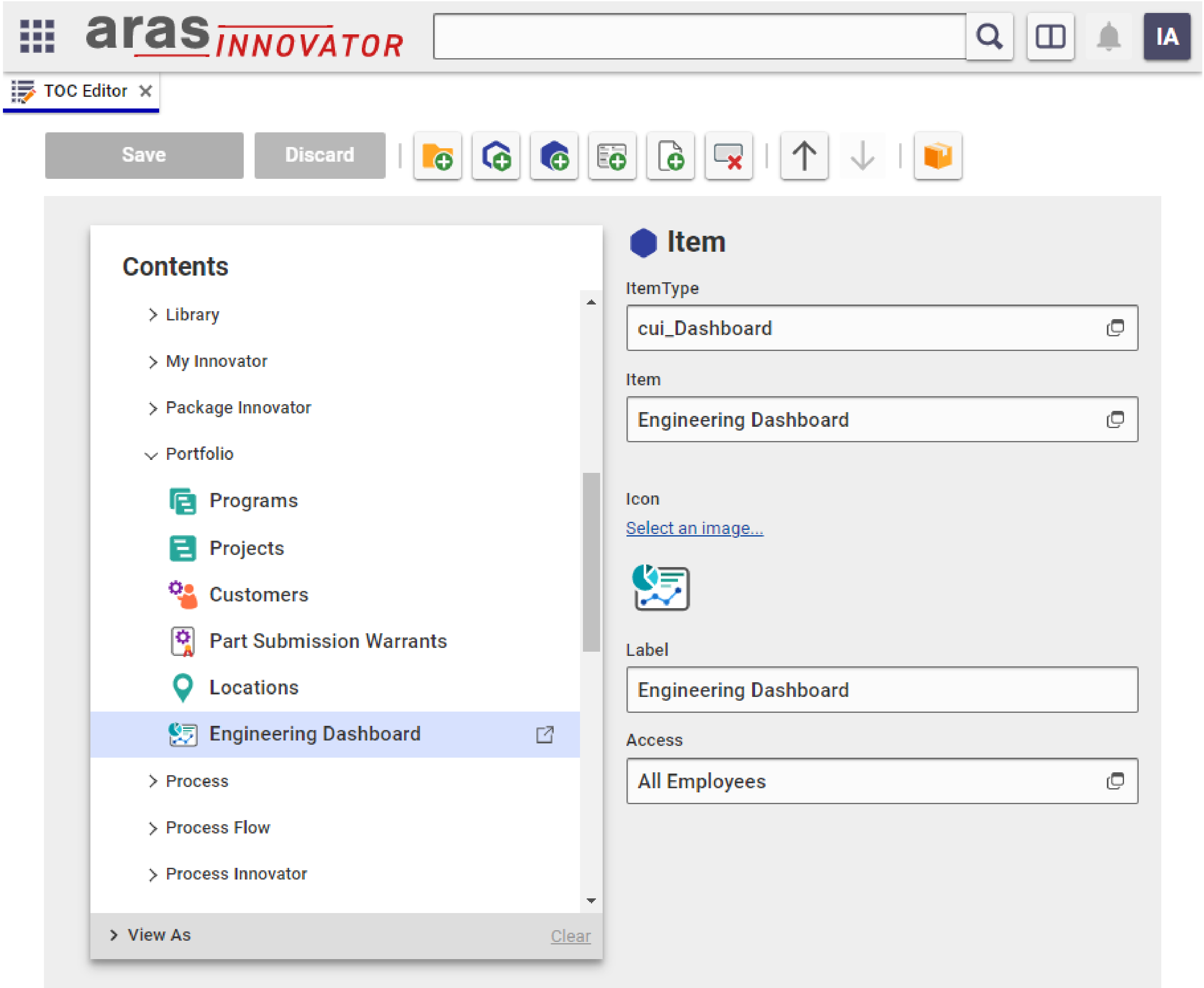
Important

Changing the settings of an ItemType button on the TOC will not affect the settings of the associated ItemType. For example, changing the button icon will not change the icons defined on the ItemType.

7. If you want to change where the button appears in the TOC, you can drag and drop it to your preferred location. Alternatively, you can select the button and use the **Move Up**/**Move Down** buttons in the toolbar.
8. When you're finished making your changes, click **Save** and close the tab for the TOC Editor.

Add a new Item Button to the TOC

"I want the All Employees identity to be able to open the Engineering Dashboard from the TOC."



Configuring a new button for the custom ItemType “Purchase Orders”

1. Navigate to Administration > Configuration > TOC Editor in the TOC.
2. Click the **Add Item** button in the toolbar.
3. In the search dialog, choose the type of item you want to add and click **OK**.
4. In the next search dialog, choose the specific item you want to add and click **OK**.

Important

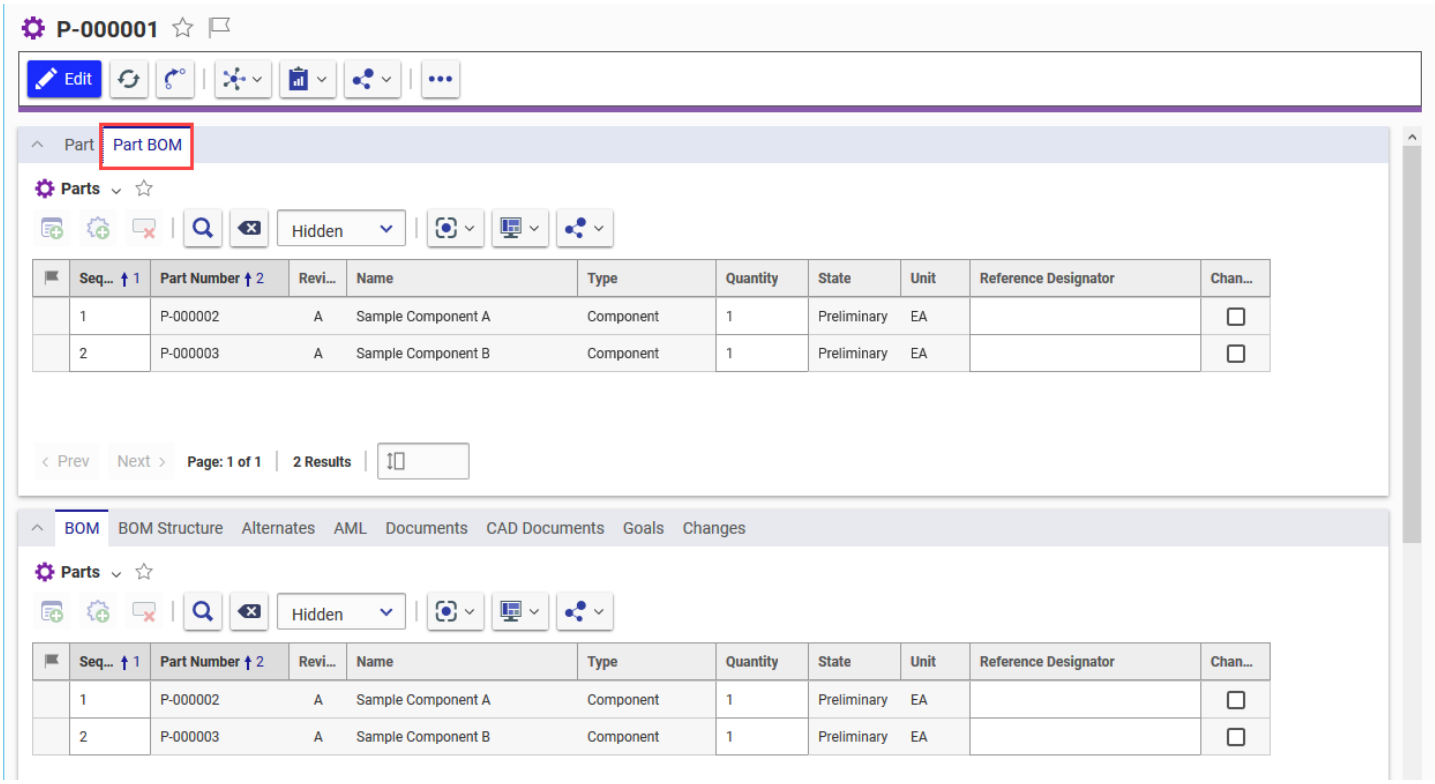
A new entry for your Item will appear in the Contents pane of the editor. If no categories were selected when you added the button, the new entry will appear at the bottom of the list. If a category was selected, the new entry will appear in that category.

5. In the righthand pane, you may customize any of the following properties:
    1. ItemType: This is the type of item that the button will open.
    2. Item: This is the specific item that will open in a new tab when a user clicks the button.
    3. Icon: This image is displayed as an icon on the button.
    4. Label: This multilingual property determines the button text.
    5. Access: This property determines which identity will see this button in the TOC. If you want multiple identities to see a button for this ItemType, pick a group identity that includes all the identities that should have access, or add a button for each identity.
6. If you want to change where the button appears in the TOC, you can drag and drop it to your preferred location. Alternatively, you can select the button and use the **Move Up**/**Move Down** buttons in the toolbar.
7. When you’re finished making your changes, click **Save** and close the tab for the TOC Editor.

Item Views

Add a tab to the first accordion

“I want to display the Part BOM tab in the top accordion for all users.”



The Part BOM tab is added to the top accordion on the Part item view

1. Open the **Part** ItemType and select the **Client Style** relationship tab.
2. Right click the entry in the grid and select **Open** to open the Presentation Configuration for the Part ItemType.
3. Click the **Edit** button.
4. Select the **cui_PresentConfigWinSection** tab.
5. Click the **New** button in the grid toolbar to create a new window section with the following properties:
    1. Classification: **Data Model**
    2. Name: **Accordion1**
    3. Location: **ItemView**
    4. For Identity: **World**
6. Click the **Save** button, then right click the new window section, and select **Open**.
7. Click the **Edit** button.
8. Click the **New** button in the grid toolbar to create a new control with the following properties:
    1. Type: **Tab Element Control**
    2. Name: **Acc1_BOM_Tab**

3. Label: **Part BOM**
4. Additional Data: **{"relTypeId": "159C6D88795B4A86864420863466F728"}**
5. Parent: **ItemView.FormAccordionTabs**
6. Sort Order: **1024**
7. Action: **Add**
8. For Identity: **World**

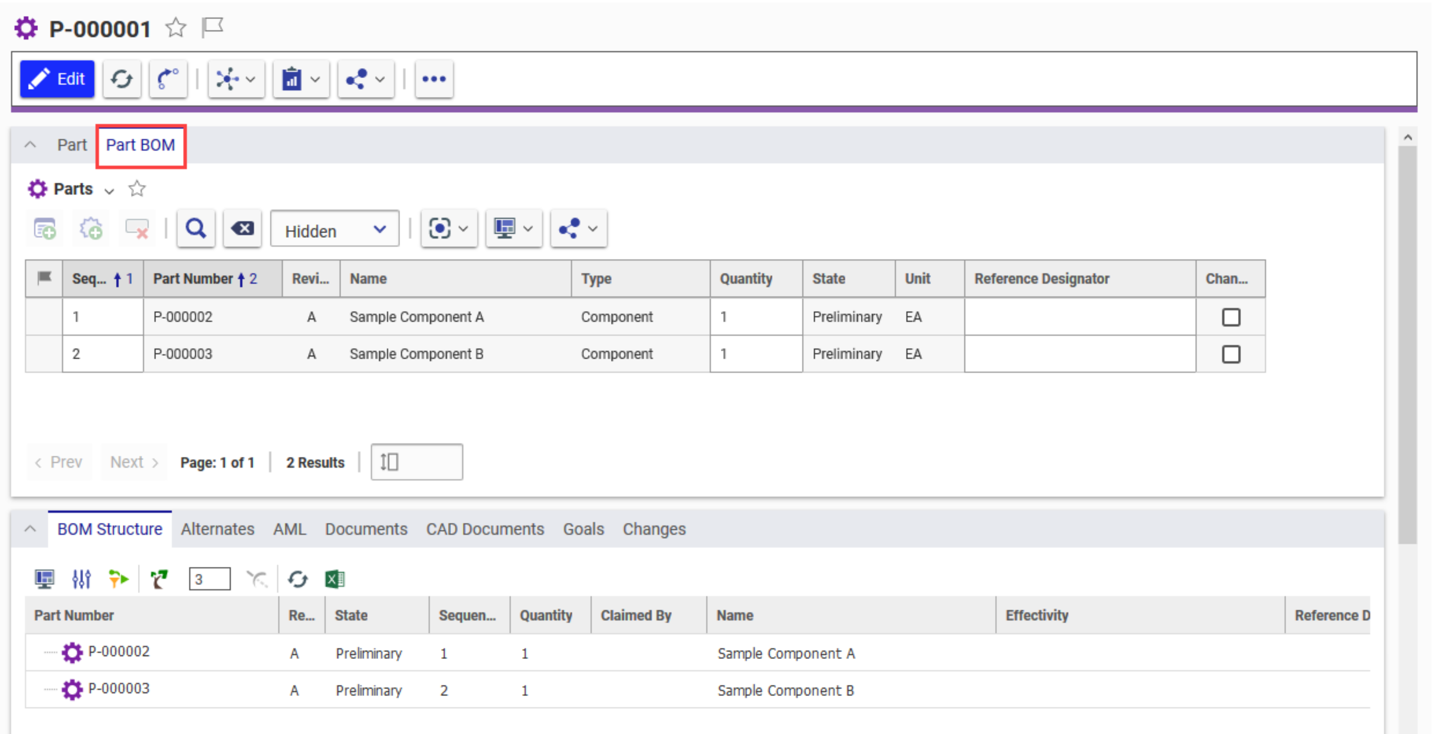
9. Click **Save**, then navigate to **Design > Parts** in the TOC and open a Part item to see the new Part BOM tab in the top accordion.

Important

The default BOM tab will still appear in the relationship accordion. See the next section for steps to hide the default BOM tab from the second accordion.

Hide a tab from the second accordion

"I want to display the Part BOM tab in the top accordion instead of the relationship accordion."

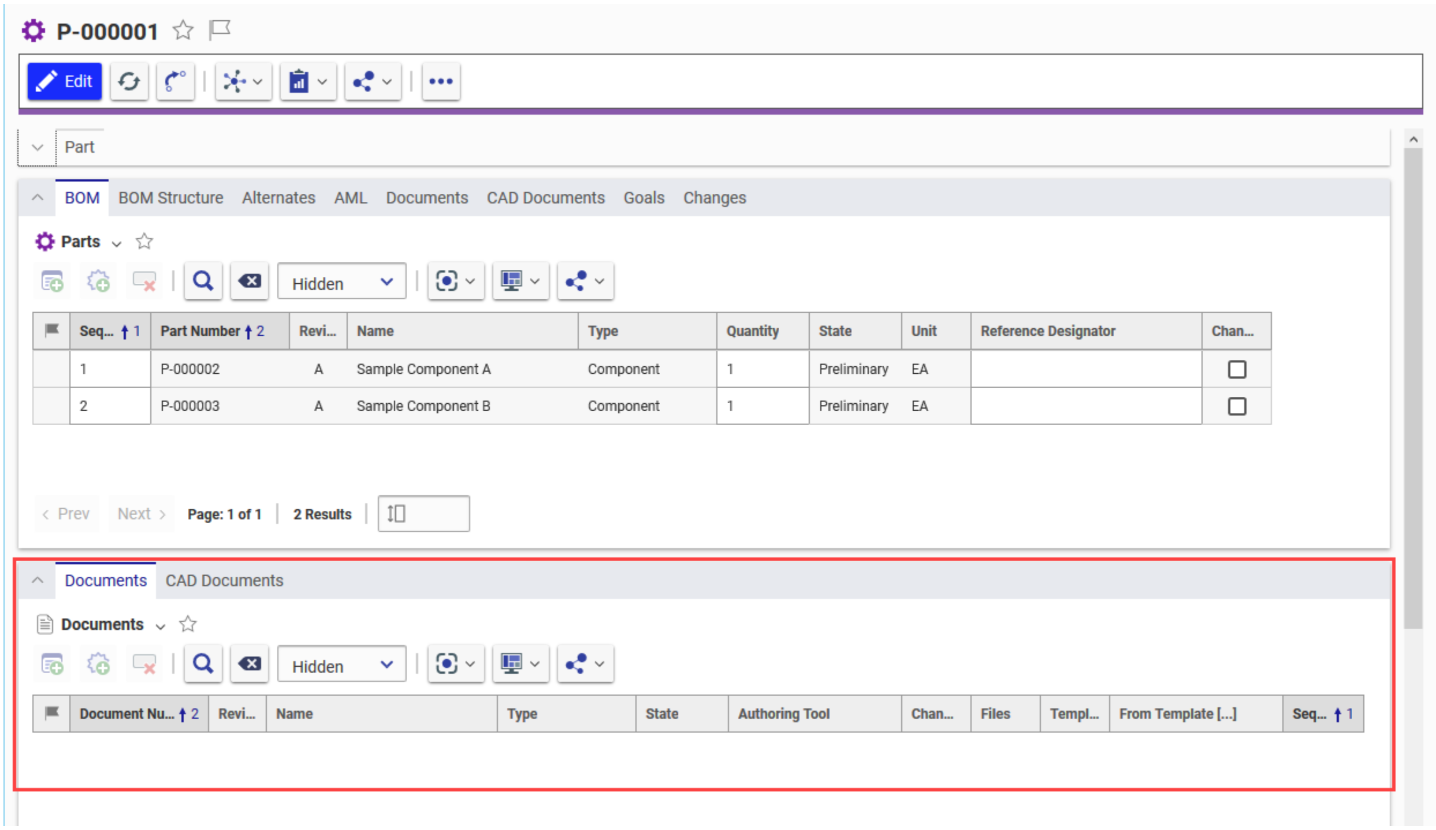


The Part BOM *only* appears in the top accordion on the Part item view

1. Follow the steps in the previous section to add the Part BOM tab to the top accordion. The following steps outline how to hide the default BOM tab from the relationship accordion.
2. Navigate to **Administration > RelationshipTypes** in the TOC.
3. Search for the **Part BOM** RelationshipType and open the item.
4. Click **Edit**.
5. Check off the **Hide In All** box to prevent the default tab from appearing in a relationship accordion.
6. Click **Save**, then navigate to **Design > Parts** in the TOC and open a Part item to confirm the default BOM tab doesn't appear in the relationship accordion.

Add a third accordion with a tab

"I want to show the Documents and CAD Documents tabs in a third accordion."



A third accordion is added displaying the Document and CAD Document tabs

1. Open the **Part** ItemType and select the **Client Style** relationship tab.

2. Right click the entry in the grid and select **Open** to open the Presentation Configuration for the Part ItemType.
3. Click the **Edit** button.
4. Select the **cui_PresentConfigWinSection** tab.
5. Click the **New** button in the grid toolbar to create a new window section with the following properties:
    1. Classification: **Data Model**
    2. Name: **Accordion3**
    3. Location: **ItemView**
    4. For Identity: **World**
6. Click the **Save** button, then right click the new window section, and select **Open**.
7. Click the **Edit** button.
8. Click the **New** button in the grid toolbar to create a new control with the following properties:
    1. Type: **Accordion Element Control**
    2. Name: **Acc3_Container**
    3. Additional Data: **{"cssClass": "aras-item-view__relationship-accordion"}**
    4. Sort Order: **2000**
    5. Action: **Add**
    6. For Identity: **World**
9. Click **Save**.
10. Click the **New** button in the grid toolbar to create a new control with the following properties:
    1. Type: **Tab Container Control**
    2. Name: **Doc_Tab_Container**
    3. Additional Data: **{"attributes" : {"slot": "header"}}**
    4. Parent: **Acc3_Container**
    5. Sort Order: **2050**
    6. Action: **Add**
    7. For Identity: **World**
11. Click **Save**.
12. Click the **New** button in the grid toolbar to create a new control with the following properties:
    1. Type: **Tab Element Control**
    2. Name: **Document_Tab**
    3. Label:**Documents**
    4. Additional Data: **{"relTypeId": "09CBB0294FAB477AA7300906DC035462"}**
    5. Parent: **Doc_Tab_Container**

    6. Sort Order: **3000**
    7. Action: **Add**
    8. For Identity: **World**
13. Click the **New** button in the grid toolbar to create a new control with the following properties:
    1. Type: **Tab Element Control**
    2. Name: **CAD_Tab**
    3. Label:**CAD Documents**
    4. Additional Data: **{"relTypeId": "C65FB7DC8C3A4EFC97A6EE8196C0B448"}**
    5. Parent: **Doc_Tab_Container**
    6. Sort Order: **3050**
    7. Action: **Add**
    8. For Identity: **World**
14. Click **Save**, then navigate to **Design > Parts** in the TOC and open a Part item to see Document and CAD Document tabs appear in a new accordion at the bottom of the page.

Additional Item View

Add a Third Accordion with a Custom Label

1. Open the **Part ItemType** and select the **Client Style** relationship tab.
2. Right-click the entry in the grid and select **Open** to open the Presentation Configuration for the Part ItemType.
3. Click **Edit**.
4. Select the **cui_PresentConfigWinSection** tab.
5. In the grid toolbar, click **Create** to add a new window section with the following properties:
    1. Classification: Data Model
    2. Name: Change_itemview
    3. Location: ItemView
    4. For Identity: World
6. Click **Save**. Then right-click the new window section and select **Open**.
7. Click **Edit**.
8. In the grid toolbar, click **Create** to add a new control with the following properties:
    1. **Type:** Accordion Element Control
    2. **Name:** Acc3_Container
    3. **Label:** Accordion_Label -*Here the administrator can define the accordion label.*
    4. **Additional Data:** `{ "cssClass": "aras-item-view__relationship-accordion" }`

    5. Sort Order: 2000
    6. Action: Add
    7. For Identity: World

9. Click **Save**.
10. In the grid toolbar, click **Create** to add another control with the following properties:
    1. **Type:** Tab Container Control
    2. **Name:** Doc_Tab_Container
    3. **Additional Data:**
       `{ "attributes": { "slot": "header" } }`
    4. **Parent:** Acc3_Container
    5. **Sort Order:** 2050
    6. **Action:** Add
    7. **For Identity:** World

11. Click **Save**.
12. In the grid toolbar, click **Create** to add another control with the following properties:
    1. **Type:** Tab Element Control
    2. **Name:** Document_Tab
    3. **Label:** Documents
    4. **Additional Data:**
       `{ "relTypeId": "09CBB0294FAB477AA7300906DC035462" }`
    5. **Parent:** Doc_Tab_Container
    6. **Sort Order:** 3000
    7. **Action:** Add
    8. **For Identity:** World

13. Click **Done** and close the **Change_itemview** tab.
14. Click **Done** and close the **Part Presentation Configuration** tab.

> **Important**
>
> Any new or existing **Part** item will display a third accordion containing the **Documents** tab, with the label **Accordion_Label** defined as a multilingual label.

Show a Label for the Form Accordion

1. Open the **Part ItemType** and select the **Client Style** relationship tab.

2. Right-click the entry in the grid and select **Open** to open the Presentation Configuration for the Part ItemType.
3. Click **Edit**.
4. Select the **cui_PresentConfigWinSection** tab.
5. In the grid toolbar, click **Create** to add a new window section with the following properties:
    1. Classification: Data Model
    2. Name: Change_itemview
    3. Location: ItemView
    4. For Identity: World
6. Click **Save**. Then right-click the new window section and select **Open**.
7. Click **Edit**.
8. In the grid toolbar, click **Create** to add a new control with the following properties:
    1. **Type:** Accordion Element Control
    2. **Name:** ItemView.FormAccordion
    3. **Label:** Accordion_Label*Here the administrator can define the accordion label.*
    4. **Action:** Extend
    5. **For Identity:** World
9. Click **Done** and close the **Change_itemview** tab.
10. Click **Done** and close the **Part Presentation Configuration** tab.

Important

Any new or existing **Part** item will display the label **Accordion_Label** on the **Form Accordion** as a multilingual label.

Show a Label for the Default Relationship Accordion

1. Open the **Part ItemType** and select the **Client Style** relationship tab.
2. Right-click the entry in the grid and select **Open** to open the Presentation Configuration for the Part ItemType.
3. Click **Edit**.
4. Select the **cui_PresentConfigWinSection** tab.
5. In the grid toolbar, click **Create** to add a new window section with the following properties:
    1. Classification: Data Model
    2. Name: Change_itemview
    3. Location: ItemView
    4. For Identity: World

6. Click **Save**. Then right-click the new window section and select **Open**.
7. Click **Edit**.
8. In the grid toolbar, click **Create** to add a new control with the following properties:
    1. **Type:** Accordion Element Control
    2. **Name:** ItemView.RelationshipAccordion
    3. **Label:** Accordion_Label*Here the administrator can define the accordion label.*
    4. **Action:** Extend
    5. **For Identity:** World
9. Click **Done** and close the **Change_itemview** tab.
10. Click **Done** and close the **Part Presentation Configuration** tab.

Important

Any new or existing **Part** item will display the label **Accordion_Label** on the default **Relationship Accordion** as a multilingual label.

Set a Default State for Accordion Sections

Every ItemType has a Default Structure View setting, configured directly on the ItemType (Administration > ItemTypes > *ItemType* > Edit > Default Structure View).
This setting controls the default layout of the ItemType's relationship accordion independently of any CUI Presentation Configuration. One of its options, *Tabs Max*, maximizes the relationship accordion by default when an item opens, without requiring a CUI configuration change. Default Structure View and CUI *attributes* configuration can both control an accordion's default state. When both are configured for the same accordion, the CUI *attributes* setting takes precedence.

Set a Default State for a Custom Accordion “I want the third accordion on the Part item view to be maximized by default when the item opens.”A third accordion is maximized by default on the Part item view

1. Open the **Part** ItemType and select the **Client Style** relationship tab.
2. Right-click the entry in the grid and select **Open** to open the Presentation Configuration for the Part ItemType.
3. Click **Edit**.
4. Select the **cui_PresentConfigWinSection** tab.
5. Click **Create** in the grid toolbar to add a new window section with the following properties:
    1. Classification: Data Model

    2. Name: Change_itemview
    3. Location: ItemView
    4. For Identity: World
6. Click **Save**, then right-click the new window section and select **Open**.
7. Click **Edit**.
8. Click **Create** in the grid toolbar to add a new control with the following properties:
    1. **Type:** Accordion Element Control
    2. **Name:** Acc3_Container
    3. **Additional Data:** { "attributes": { "maximized": true } }
    4. **Sort Order:** 2000
    5. **Action:** Add
    6. **For Identity:** World
9. Click **Done** and close the **Change_itemview** tab.
10. Click **Done** and close the **Part Presentation Configuration** tab.

Any new or existing **Part** item will display the third accordion maximized by default.Replace *maximized* with *collapsed* in the Additional Data property to apply a different default state.

Set a Default State for the Form Accordion “I want the Form Accordion collapsed by default when the item opens.”The Form Accordion is collapsed by default on the Part item view

1. Follow the same steps as Set a Default State for a Custom Accordion to open the Part Presentation Configuration and create the **Change_itemview** window section.
2. Click **Create** in the grid toolbar to add a new control with the following properties:
    1. **Type:** Accordion Element Control
    2. **Name:** ItemView.FormAccordion
    3. **Additional Data:** { "attributes": { "collapsed": true } }
    4. **Action:** Extend
    5. **For Identity:** World
3. Click **Done** and close the **Change_itemview** tab.
4. Click **Done** and close the **Part Presentation Configuration** tab.

Any new or existing **Part** item will display the Form Accordion collapsed by default.

Set a Default State for the Default Relationship Accordion “I want the default Relationship Accordion maximized by default when the item opens.”The default Relationship Accordion is maximized by default on the Part item view.

1. Follow the same steps as Set a Default State for a Custom Accordion to open the Part Presentation Configuration and create the **Change_itemview** window section.
2. Click **Create** in the grid toolbar to add a new control with the following properties:
    1. **Type:** Accordion Element Control
    2. **Name:** ItemView.RelationshipAccordion
    3. **Additional Data:** { "attributes": { "maximized": true } }
    4. **Action:** Extend
    5. **For Identity:** World
3. Click **Done** and close the **Change_itemview** tab.
4. Click **Done** and close the **Part Presentation Configuration** tab.

Any new or existing **Part** item will display the default Relationship Accordion maximized by default.

Set a Default State for the Relationship Accordion Using Default Structure View “I want to maximize the default Relationship Accordion for the Part ItemType without creating a CUI configuration.”The default Relationship Accordion is maximized by default on the Part item view, configured at the ItemType level.

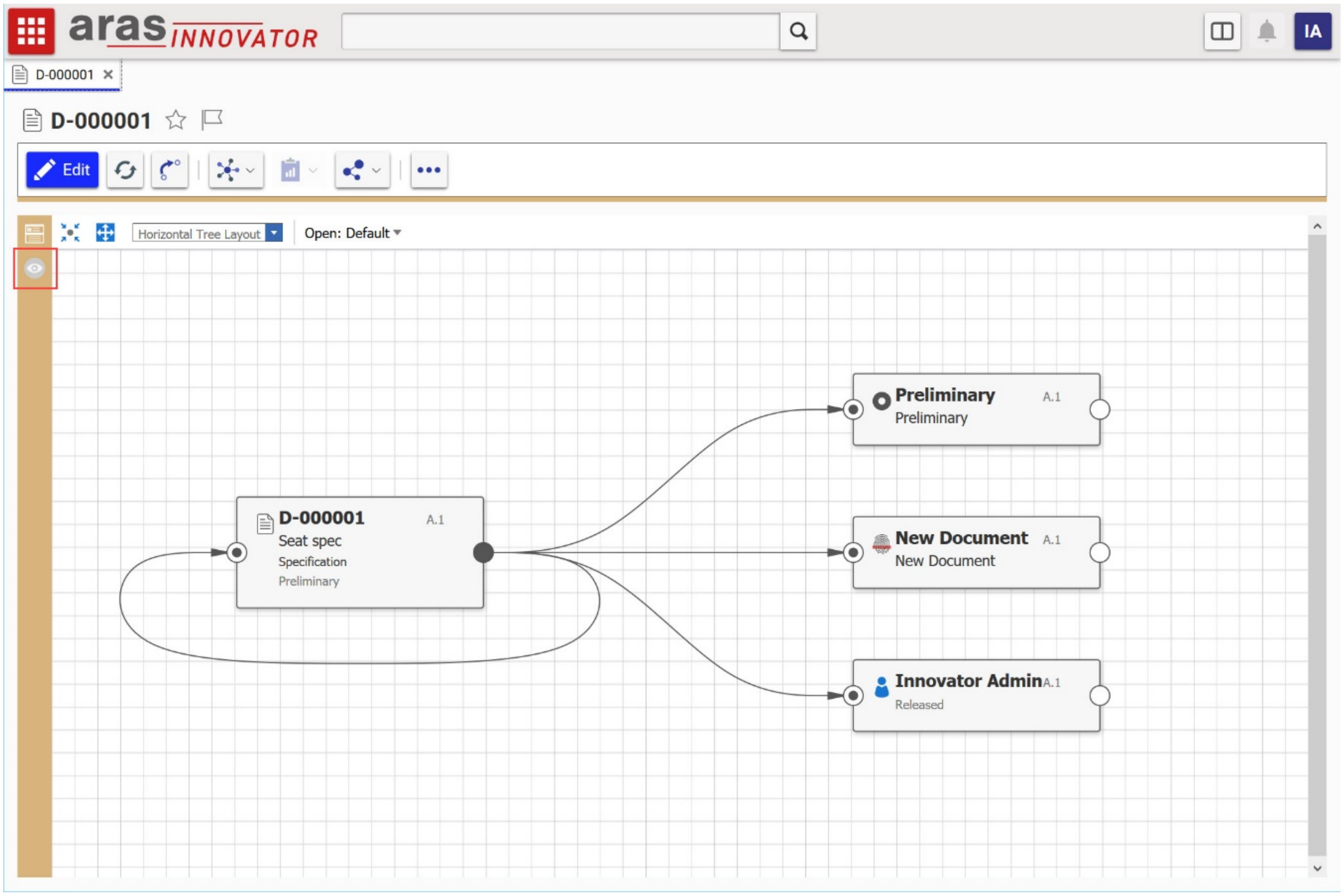
1. Navigate to **Administration > ItemTypes** and open the **Part** ItemType.
2. Click **Edit**.
3. In the **Default Structure View** dropdown, select **Tabs Max**.
4. Click **Save**.

Any new or existing Part item will display the default Relationship Accordion maximized by default. This setting applies to all users and does not require a Presentation Configuration change. If a CUI attributes setting is later added for the same accordion, the CUI setting takes precedence over this Default Structure View setting.

Item View Sidebar

Display the ad hoc Graph View from an Item View Sidebar button

“I want to add a button to the sidebar of all items that will show an ad hoc Graph View in the item view.”



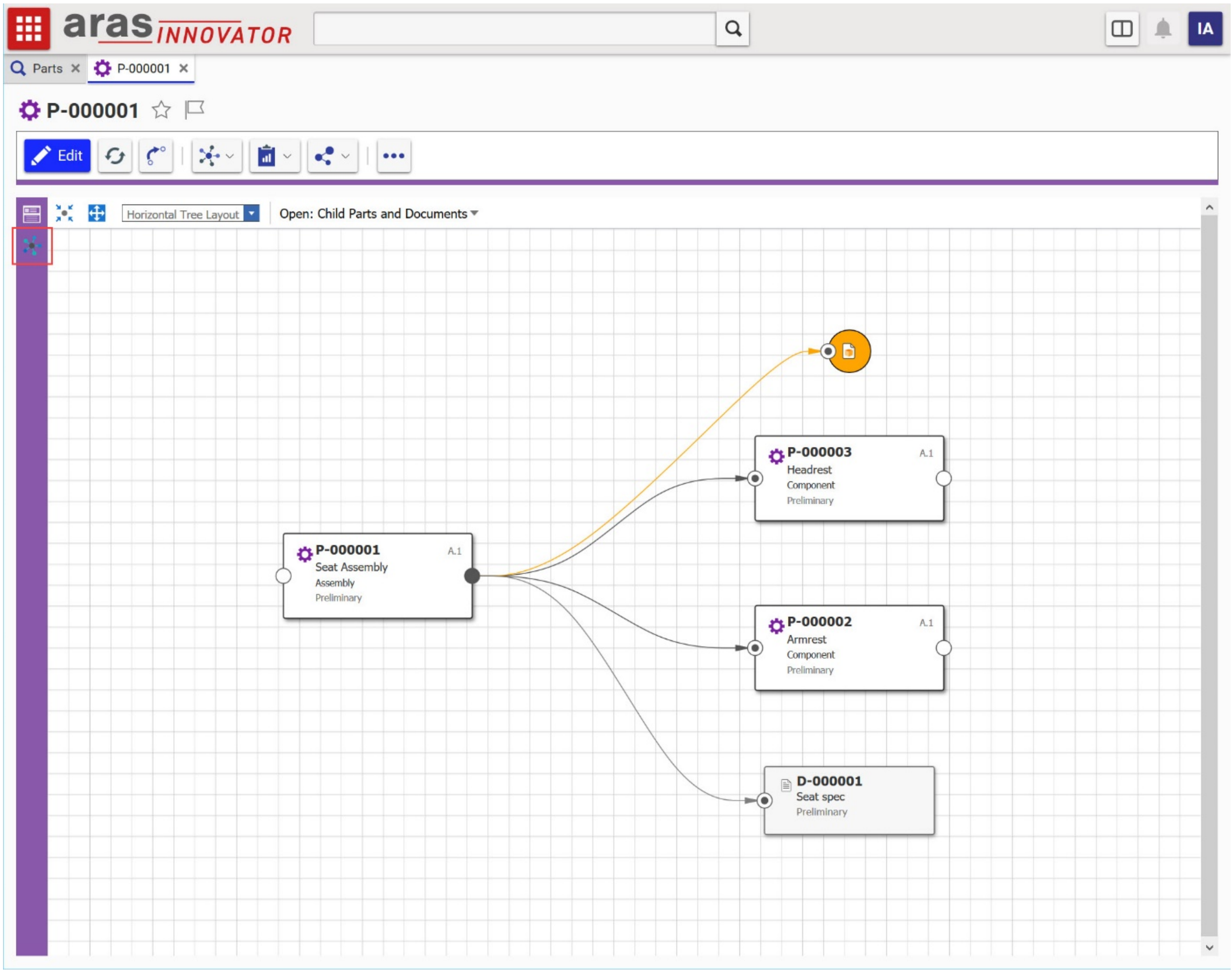
A sidebar button for displaying the ad hoc graph is added to the global Item View definition

1. Navigate to **Administration > Configuration > Client Presentation** in the TOC.
2. Click the **Search** button to run the Client Presentation search.
3. Click the **Global** item property in the single search result.
4. In the Command Bar Section grid, open the **Global Sidebar** item.
5. Click the **Edit** button.
6. Click the **New** button in the Command Bar Item grid, then select **Button > OK** in the dialog to create a new button with the following properties:
    1. Name: **My_Ad_Hoc_Graph_Button**
    2. Sort Order: **256**
    3. Action: **Add**
    4. For Identity: **World**
7. Right click the new button row and select **Open**.

8. Enter the following properties for the new Menu Button:
    1. Click Method: **sidebar_default_gv_click**
    2. Image: choose the icon you want to show when the sidebar button is inactive
    3. Additional Image: choose the icon you want to show when the button is active
9. Click the **Save** button and close the Button tab.

Display a query-based Graph View from an Item View Sidebar button

"I want to display the Part BOM Graph View when the user clicks a sidebar button on a Part."

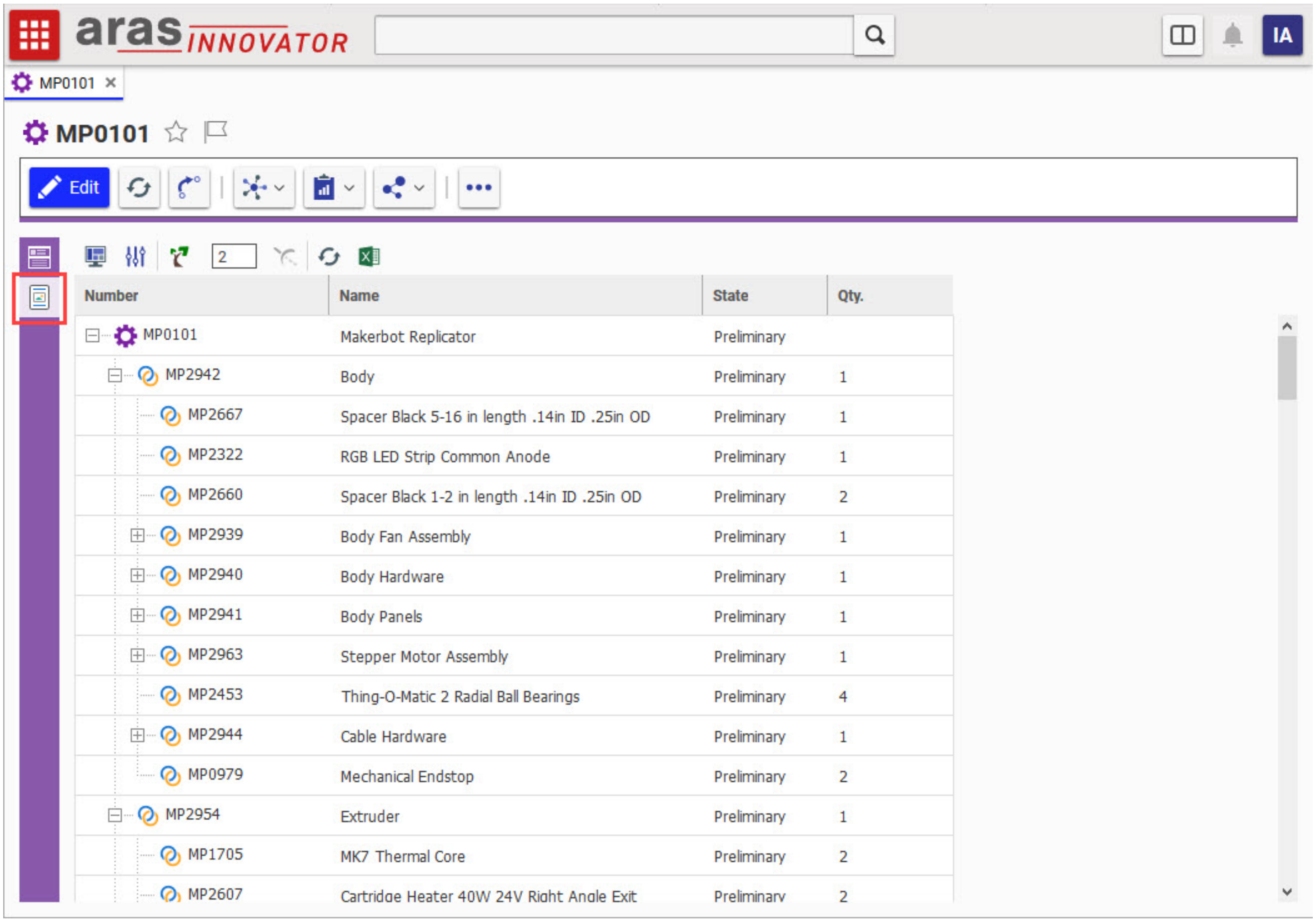


A sidebar button for displaying a specific graph is added to the Part form

1. Open the **Part** ItemType and select the **Client Style** relationship tab.
2. Right click the entry in the grid and select **Open** to open the Presentation Configuration for the Part ItemType.
3. Click the **Edit** button.
4. Click the **New** button in the Command Bar Section grid to create a new section with the following properties:
    1. Classification: **Data Model**
    2. Name: Part_Custom_Sidebar
    3. Location: ItemWindowSidebar
    4. Sort Order: **256**
    5. For Identity: **World**
5. Click the **Save** button, then right click the new Command Bar Section, and select **Open**.
6. Click the **Edit** button.
7. Click the **New** button in the Command Bar Item grid to create a new item with the following properties:
    1. Type: Button
    2. Name: My_Graph_Button
    3. Sort Order: **1100**
    4. Action: **Add**
    5. For Identity: **World**
8. Click **Save**, then right click the new Button, and select **Open**.
9. Click the **Edit** button.
10. Set the following properties on the item form:
    1. Additional Data: { "gvdId": " `<graph view id>` " }
    2. Click Method: sidebar_default_gv_click
    3. Image: **choose the icon you want to show when the sidebar button is inactive**
    4. Additional Image: **choose the icon you want to show when the button is active**
11. Click **Save**, then navigate to **Design > Parts** in the TOC.
12. Open a Part item to see the new button in the sidebar.
13. Click the new sidebar button to view the specified Graph View.

Display a Tree Grid View from an Item View Sidebar button

“I want to display the BOM as a Tree Grid View when the user clicks a sidebar button on a Part.”



A sidebar button for displaying a Tree Grid View is added to the Part form

1. Open the **Part** ItemType and select the **Client Style** relationship tab.
2. Right click the entry in the grid and select **Open** to open the Presentation Configuration for the Part ItemType.
3. Click the **Edit** button.
4. Click the **New** button in the Command Bar Section grid to create a new section with the following properties:
    1. Classification: **Data Model**
    2. Name: Part_Custom_Sidebar
    3. Location: ItemWindowSidebar
    4. Sort Order: **256**
    5. For Identity: **World**

5. Click the **Save** button, then right click the new Command Bar Section, and select **Open**.
6. Click the **Edit** button.
7. Click the **New** button in the Command Bar Item grid to create a new item with the following properties:
    1. Type: Button
    2. Name: My_TGV_Button
    3. Sort Order: **1200**
    4. Action: **Add**
    5. For Identity: **World**
8. Click **Save**, then right click the new Button, and select **Open**.
9. Click the **Edit** button.
10. Set the following properties on the item form:
    1. Additional Data: { "tgvdId": " <tree grid view id> ", "startConditionProvider": "ItemDefault({\"id\":\"id\"})" }
    2. Click Method: sidebar_default_tgv_click
    3. Image: **choose the icon you want to show when the sidebar button is inactive**
    4. Additional Image: **choose the icon you want to show when the button is active**

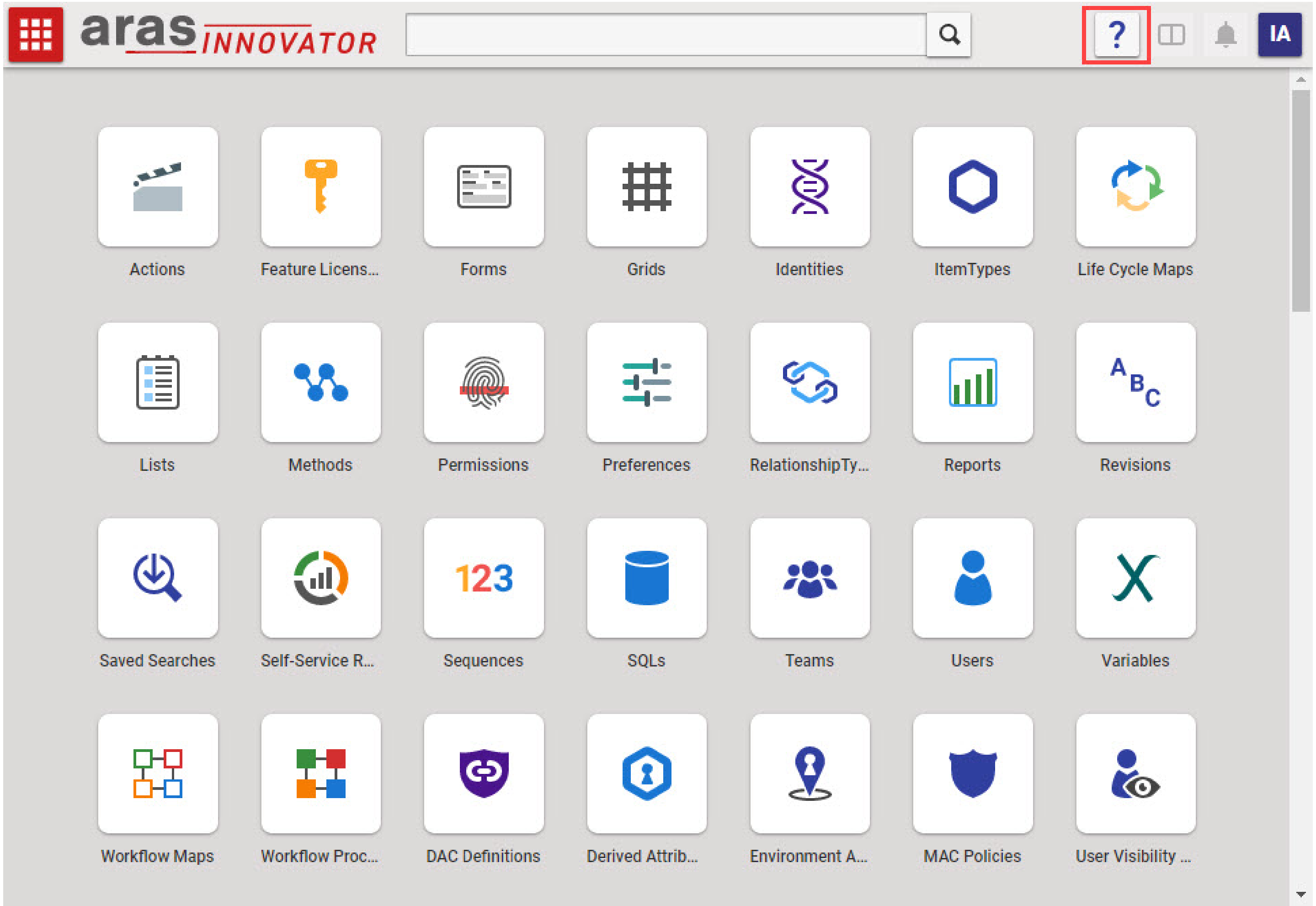
> **Important**
>
> The *startConditionProvider* property in Additional Data is optional. The view will use the context item's id as the starting condition if this property is not provided. It's only necessary to include the *startConditionProvider* property if your Tree Grid View has a start condition that is not the id of the context item.

11. Click **Save**, then navigate to **Design > Parts** in the TOC.
12. Open a Part item to see the new button in the sidebar.
13. Click the new sidebar button to view the specified Tree Grid View.

Headers and Title Bars

Add a Button to the Main Window Header

"I want to display the 'help' content when the user clicks a button in the main window header."



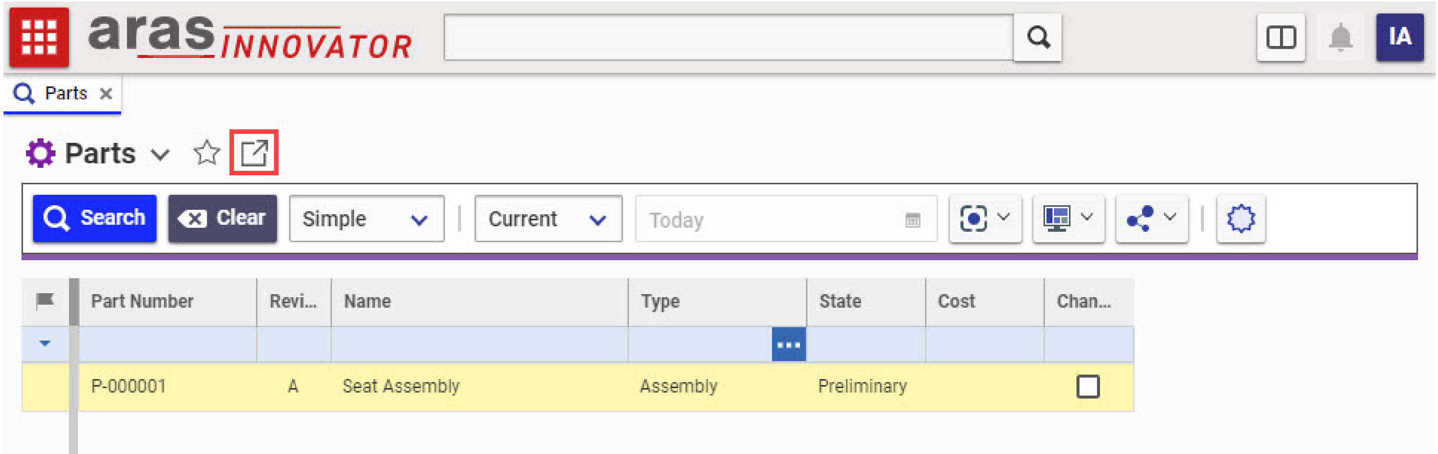
A main window header button for displaying the default Aras Innovator “help” content

1. Navigate to **Administration > Configuration > Client Presentation** in the TOC.
2. Click the **Search** button to run the Client Presentation search.
3. Click the **Global** item property in the single search result.
4. In the Command Bar Section grid, open the **com.aras.innovator.cui_default.mwh_header**item.
5. Click the **Edit** button.
6. Click the **New** button in the Command Bar Item grid, then select **Button > OK** in the dialog to create a new button with the following properties:
    1. Name: **Custom_Help_Button**
    2. Sort Order: **75**
    3. Action: **Add**

    4. For Identity: **World**
7. Right click the new button row and select **Open**.
8. Enter the following properties for the new Menu Button:
    1. Click Method: **cui_default_mwh_onHelpCommand**
    2. Image: choose the icon you want to show on the button
    3. Additional Data: **{"right":true}**
9. Click the **Save** button and close the Button tab.
10. Logout and login to see the new button in the main window header.

Add a Button to the Search View Title Bar

“I want to display the context ItemType when an admin clicks a button in the search view title bar.”



A search view title bar button for displaying the context ItemType definition

1. Navigate to **Administration > Methods** and create a new JavaScript Method with the following code:

```
var topWindow = aras.getMostTopWindowWithAras(window);
var workerFrame = topWindow.work;
if (workerFrame && workerFrame.itemTypeID) {
aras.uiShowItem('ItemType',workerFrame.itemTypeID);
}
```

2. Click **Save** and close your new Method.
3. Navigate to **Administration > Configuration > Client Presentation** in the TOC.
4. Click the **Search** button to run the Client Presentation search.
5. Click the **Global** item property in the single search result.

6. In the Command Bar Section grid, open the **searchview.titlebar.default**item.
7. Click the **Edit** button.
8. Click the **New** button in the Command Bar Item grid, then select **Button > OK** in the dialog to create a new button with the following properties:
    1. Name: **Open_ItemType_From_SearchView**
    2. Sort Order: **768**
    3. Action: **Add**
    4. For Identity: **Administrators**
9. Right click the new button row and select **Open**.
10. Enter the following properties for the new Menu Button:
    1. Click Method: choose the **new Method** you created
    2. Image: choose the icon you want to show on the button
    3. Additional Data: **{ "cssClass": "aras-button_d" }**
11. Click the **Save** button and close the Button tab.

> **Important**
>
> The same title bar content can also be configured for the RelationshipsView, SearchDialog, and GraphView locations.