

File Handling User Interface

This section describes the File Handling UI in all the locations it is seen and used. This UI is designed to be consistent across all locations where Files can be seen.

Main Grid

The following screenshot shows the properties with a data source of the File ItemType that appear in the main grid.

The screenshot displays the 'CAD Documents' main grid and the 'Properties' panel. The main grid shows a list of documents with columns for Document Number, Revision, Name, Type, State, Native File, Viewable File, Authoring Tool, and checkboxes for Chan..., Stand..., and Templ... The Properties panel on the left shows details for the selected document, including Created By, Created On, Modified By, Modified On, Locked By, Major Rev, Release Date, Effective Date, Generation, and State.

Document Number	Revi...	Name	Type	State	Native File [...]	Viewable File [...]	Authoring Tool	Chan...	Stand...	Templ...
P13464	A	Test Part P31464		Preliminary	claimflags.d...		AutoCAD	☐	☐	☐
P31464_2	A			Preliminary				☐	☐	☐
P31464_3	A			Preliminary				☐	☐	☐
P31510	A	Test Part P31510	Mechanical/Dra...	Preliminary			AutoCAD	☐	☐	☐
P31510_2	A			Preliminary				☐	☐	☐

Document Number	Revision	Name	Type	State	Native File [...]	Viewable File [...]
P31464	A	Test Part P31464		Preliminary	P31464.SLDPRT	
P31510	A	Test Part P31510		Preliminary	P31510.SLDPRT	P31510.pdf
P31464_2	A			Preliminary	P31464.SLDPRT	
P31510_2	A			Preliminary	P31510.SLDPRT	P31510.pdf
P31464_3	B			Preliminary	P31464.SLDPRT	

Clicking on the name of the File will open the file within the browser and prompts you to “Open, Save, or Save As”. Clicking on the File icon to the left of the file name in the main grid opens the Manage File dialog.

Manage file property



[claimflags.docx](#)

111.9 KB - Microsoft Word

1/23/2019, 4:36 PM



OK

Cancel

This dialog presents a similar File link as seen in the main grid as well as some additional information and buttons. You can choose to download the file to their downloads directory by clicking on the rightmost icon.

Item Window

The properties with a data source of the File ItemType that are displayed on the Item Form are seen as demonstrated by the Native File Property shown here.

P13464 x

P13464

Edit

Refresh

Undo

Redo

Find

Print

More

CAD Document

Document Number

Revision

State

P13464

A

Preliminary

Name

Test Part P13464

Type

Authoring Tool

Version

AutoCAD

Description

Assigned Creator

Designated User

From Template

☐ Changes Pending

☐ Standard

☐ Template

Part

Native File

[claimflags.docx](#)

Viewable File

Structure

Parents

Files

Changes

CAD Documents

Hidden

Find

Print

More

Sequence	Document Numbe...	Revisi...	Name	Type	State	Native File [...]	Viewable File [...]	Authoring Tool	Dependency	Changes	Standard	Template
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This display is like the one seen in the main grid. Both the direct link to the File and the File icon are available. Clicking on the link streams the physical file to the browser to be handled while clicking on the File icon displays the Manage File UI.

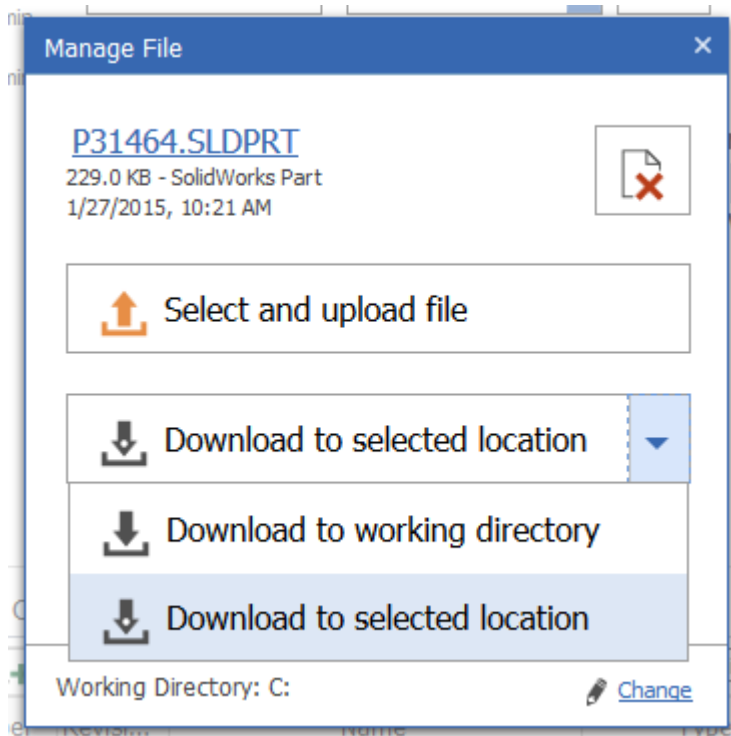
If the Item is not claimed, you see the same dialog as when you clicked the file icon in the main grid. When the containing Item is claimed, additional buttons become available.



Clicking on X will clear the file from the Property. The File is not deleted unless the Variable Item `Force.Delete.Orphaned.Files` is set to 1 and the File is not included in any other Items.

Clicking on arrow opens a file browser to select a new file for the Property. Any existing file stored in the property is replaced.

When you have finished working with the File, click on **OK** to close the dialog.



Relationship Grid

Files displayed in the Relationships grid work in the same way as those displayed in the main grid. By default, the `related_id` property is directly displayed in the relationships grid. This property acts as any other Property with a data source of the File ItemType.



Order Finances x

Order Finances

Edit

Document

Document Number

Order Finances

Revision

A

State

Preliminary

Assigned Creator

[William Hunt](#)

Name

Designated User

[ES Admin](#)

Type

Authoring Tool

Version

Effective Date

Description

From Template

☒ Files Attached
 ☐ Changes Pending
 ☐ Template

Files Changes

Files

Hidden

	Related File [...]	File Type [...]	Comments	Sequence ▲	Is Shared	Indexed On [...]
	Order Financ...	Microsoft Excel		1	☒	

In the **Related File [...]** column, clicking on the file link streams the physical file to the browser to be handled while clicking on the File icon displays the Manage File UI. The available buttons in the UI are dependent on the current claim status of the Item as well as on the RelationshipType definition.

If the relationship does not allow the `related_id` to be null, then the **clear** icon is disabled.

If the relationship does not allow using **Pick Related**, then the **upload file** button is disabled.

Both buttons are disabled if the containing Item is claimed.

File History

File Items are handled in different ways in Aras Innovator. Because of this, the History Actions associated with Files are also different.

Item History

Item

[Order Finances.xlsx](#)

History

History

Hidden

When [...]	Who [...]	Action	Comment [...]	Item State	Rev	Gen	Created_on_ti...
1/24/2019 10:30...	Super User	FileDownload		Released	A	1	6368394061223...

The **FileDownload** History Action records a History entry whenever the File is requested from the server to be downloaded to the client. The standard **Add** History Action records a History entry whenever a new File Item is added to Aras Innovator.

Additional information on File Activity can be followed using the **Track** History option for the Properties themselves.

Enabling File History

In a standard installation of Aras Innovator, History for File Items is disabled.

To enable History, you need to login as Super User, login name **root**, and set the File History template on the File ItemType.



File x

File

Save Done Discard

ItemType

Name: File

Singular Label: File

Plural Label: Files

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

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

Class Structure

Show Parameters Tab: When Populated

History Template: File

Default Structure View: Tabs Min

Versioning

Versionable: ☐

Discipline: Automatic

Revisions: Default

Search

Auto Search: ☐ Default Page Size: 25

Max Records:

Implementation Type

☒ Single Item ☐ Poly Item ☐ Federated Item

☐ Unlock On Logout
☐ Dependent
☐ Is Relationship
☐ Enforce Discovery
☐ Use Src Access
☐ Allow Private Permissions

Enable for Secure Social

Once enabled, access the File History from the Manage File dialog.

Manage File

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OK Cancel