

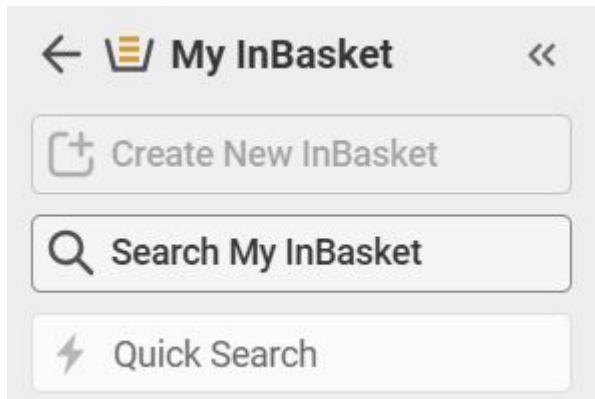
Configuring InBasket

Viewing Others' Assignments/Tasks

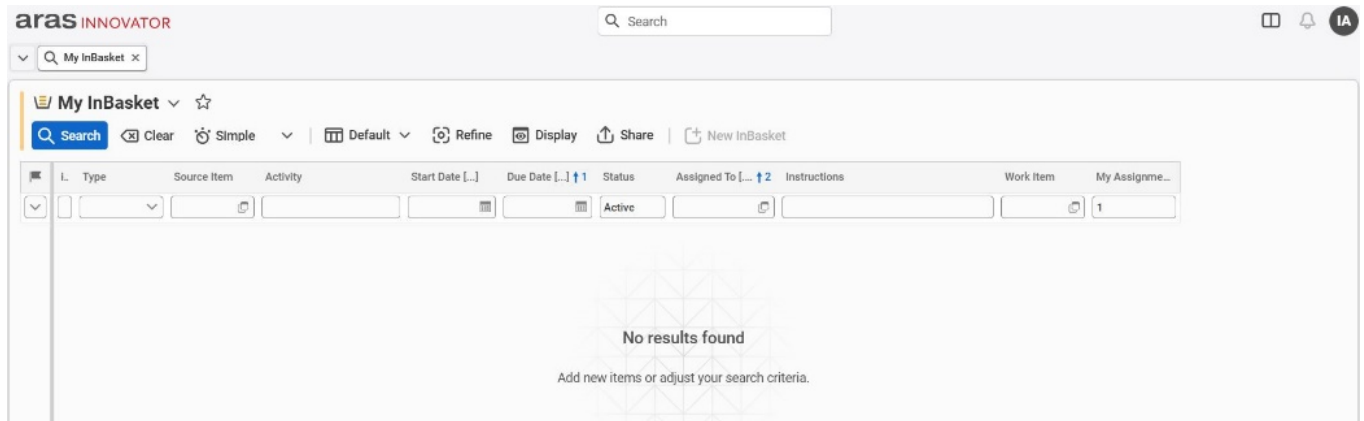
Users can now easily view tasks that are not assigned to them directly. Users can search for tasks in other users' **InBasket**.

By default, only members of the *Administrators* group have the permissions necessary to see others' tasks.

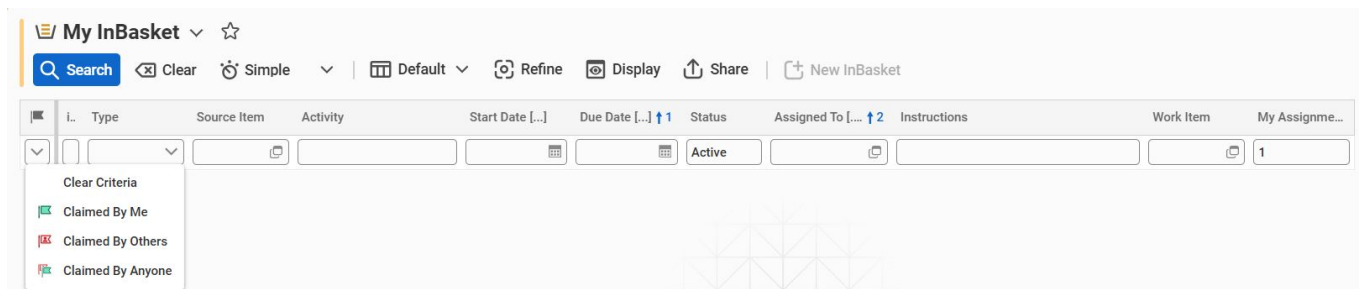
1. Log on to Aras Innovator with administrative privileges.
2. Select My Innovator --> My InBasket in the TOC. Click the magnifying glass icon null to access the Search grid.
3. Clicking the My Inbasket icon in the TOC causes the following menu to appear:



By default, the search grid displays tasks assigned to you with 'Active' status.



4. Click null in the grid to filter the search criteria. A menu similar to the following appears:



- **Clear Criteria** erases any search criteria that you entered.
- **Claimed by Me** displays a list of the tasks that you have claimed.
- **Claimed by Others** displays a list of tasks that have been claimed by other users.
- **Claimed by Anyone** displays tasks claimed by you along with tasks claimed by other people.

5. Click null to view the search results. The InBasket search grid now displays all the tasks.

Creating InBasket Task ItemType

By default, the configurable InBasket supports Workflow Tasks. However, you can now create and add new Task/Activity ItemTypes to the InBasket Task. Let us consider an example of creating a Meeting Task ItemType and adding it to the InBasket Task Item. Creating InBasket Task ItemType involves four main procedures. The procedures are described in the following sections.

Creating an ItemType

1. Log on to Aras Innovator with administrative privileges.
2. Select **Administration > ItemTypes**. The following menu appears:

container_type_id	Container Type	item	ItemType	
due_date	Due Date	date		
instructions	Instructions	string		1024
item	Work Item	item	Part	
item_type_id	Item Type	item	ItemType	
my_assignment	My Assignment	boolean		
name	Activity	string		128
start_date	Start Date	date		
status	Status	String		64
icon	Icon	Image		
language_code_filter	Language Code Filter	String		3

5. In the **TOC Access** tab, add users (Identities), who should be able to see the ItemType in the TOC Pane so that they can select the Item.
6. In the **Can Add** tab, add users (Identities), who can add a new Item of this type to the database.
7. In the **Permissions** tab, add users (Identities) to indicate the access rights to the ItemType.
8. Click the **Save** and **Done** buttons to save and unlock.

Configure InBasket Task ItemType (Meeting Task ItemType)

1. Log on to Aras Innovator with administrative privileges.
2. Navigate to **Administration --> ItemType**.
3. From the grid, search for InBasket Task Item, double-click on it and then click null to open the Item for editing.
4. In the Poly Sources tab, click null to add a new related Item. The Select Items ItemTypes search dialog box appears.



Select Items

ItemTypes

Simple

Name	Singular Label	Plural Label	Versio...	Depen...	Relatio...	C.	Use Src ...	Description ...	Help Url	Help Item [...]	History Tem...	Allow Privat...	MaxRecords
										***	***		

< Prev

Next >

Page: 1

25

OK

Cancel

5. Enter **Meeting** in the Name field to search for the Meeting ItemType. In our example, we create a Meeting Task Item as a related Item with the following properties on the **Properties** tab
The **Meeting** ItemType properties

Property Name	Label	Data Type	Data Source	Length
assigned_to	Assigned To	Item	Identity	
container	Source Item	Item	NULL (or any value)	
container_type_id	Source Item	Item	ItemType	
due_date	Due Date	Date		
instructions	Instructions	String		1024
item	Work Item	Item	NULL (or any value)	
item_type_id	Item Type	Item	ItemType	
my_assignment	My Assignment	Boolean		
name	Activity	String		128
start_date	Start Date	Date		
status	Status	String		64
icon	Icon	Image		
language_code_filter	Language Code Filter	String		3

6. Add the following forms to the **Views** tab.
The **Views** tab form



Form Name	Type	Description
-----------	------	-------------

Meeting Task	Default	Form to be displayed to the user for actions such as View, Edit, and so on related to the Meeting ItemType.
--------------	---------	---

Meeting Task Complete	Complete	An empty form/or a placeholder used when the Meeting Task is Complete.
-----------------------	----------	--

7. In the **TOC Access** tab, add users (Identities), who should be able to see the ItemType in the TOC Pane so that they can select the Item.
8. In the **Can Add** tab, add users (Identities), who can add a new Item of this type to the database.
9. In the **Permissions** tab, add users (Identities) to indicate the access rights to the ItemType.
10. Click **Class Structure**. Add a node for Meeting Task.
11. Click Save and Done to save and unlock the ItemType.

SQL Table and View Execution

1. Log on to Aras Innovator with administrative privileges.
2. Navigate to **Administration --> SQLs**.
3. Create a SQL View to drop the Meeting table:
 1. Click **File --> New** or use the right mouse button (right-click) and select **New SQL** from the context menu.
 2. The SQL window appears. Configure the following properties:

Name = Meeting_Task_Step1_Drop

Type = Table

Execution Flag = Manual

SQL:

```
IF EXISTS (SELECT * FROM sys.tables WHERE object_id = OBJECT_ID(N'[inn
DROP TABLE [Meeting_Task]
IF EXISTS (SELECT * FROM sys.views WHERE object_id = OBJECT_ID(N'[inn
DROP VIEW [Meeting_Task]
```

3. Click **Save** and click **Unlock** to save and unlock the SQL Item.
4. Navigate to **Actions --> SQL Execute** in the SQL window.



5. Verify and ensure that table [innovator].[Meeting_Task] is dropped from your database.
4. Create a temporary view for Meeting Task ItemType
 1. Navigate to **Administration --> SQLs**.
 2. Click **File --> New** or use the right mouse button (right-click) and select **New SQL** from the context menu.
 3. The SQL window appears. Configure the following properties:

Name = Meeting_Task_Step02_Create_Tmp_View

Type = View

Execution Flag = Manual

SQL:



```

CREATE VIEW [Meeting_Task_Step02_Create_Tmp_View]
AS
SELECT STUFF(MEETING_TASK.id, 13, 1, '0') AS ID,
MEETING_TASK.ASSIGNED_TO      AS ASSIGNED_TO,
MEETING_TASK.ITEM              AS ITEM,
MEETING_TASK.Item_TYPE_ID      AS ITEM_TYPE_ID,
MEETING_TASK.START_DATE        AS START_DATE,
MEETING_TASK.Due_DATE          AS DUE_DATE,
MEETING_TASK.INSTRUCTIONS      AS INSTRUCTIONS,
'1'                             AS MY_ASSIGNMENT,
MEETING_TASK.NAME,
MEETING_TASK.CONTAINER          AS CONTAINER,
MEETING_TASK.CONTAINER_TYPE_ID AS CONTAINER_TYPE_ID,
MEETING_TASK.STATUS             AS STATUS,
MEETING_TASK.Agenda AS AGENDA,
it.open_icon AS ICON,
MEETING_TASK.CLASSIFICATION,
MEETING_TASK.KEYED_NAME,
MEETING_TASK.CREATED_ON,
MEETING_TASK.CREATED_BY_ID,
MEETING_TASK.OWNED_BY_ID,
MEETING_TASK.MANAGED_BY_ID,
MEETING_TASK.MODIFIED_ON,
MEETING_TASK.MODIFIED_BY_ID,
MEETING_TASK.CURRENT_STATE,
MEETING_TASK.STATE,
MEETING_TASK.LOCKED_BY_ID,
MEETING_TASK.IS_CURRENT,
MEETING_TASK.MAJOR_REV,
MEETING_TASK.MINOR_REV,
MEETING_TASK.IS_RELEASED,
MEETING_TASK.NOT_LOCKABLE,
MEETING_TASK.CSS,
MEETING_TASK.GENERATION,
MEETING_TASK.NEW_VERSION,

```



```

MEETING_TASK.CONFIG_ID,
MEETING_TASK.PERMISSION_ID,
MEETING_TASK.TEAM_ID,
lang.code
FROM innovator.Meeting AS MEETING_TASK
INNER JOIN innovator.ITEMTYPE AS it on it.name = N'Meeting Task'
LEFT OUTER JOIN innovator.LANGUAGE AS lang
ON lang.ID is NOT NULL

```

AS lang

4. Click **Save** and **Done** to save and unlock the SQL Item.
5. Navigate to **Actions --> SQL Execute** in the SQL window.
6. Make sure that temporary View with name **Meeting_Task_Step02_Create_Tmp_View** is created in your database.

5. Rename view for Meeting Item Type.

1. Navigate to **Administration --> SQLs**.
2. Click **File --> New** or use the right mouse button (right-click) and select **New SQL** from the context menu.
3. The SQL window appears. Configure the following properties:

Name = Meeting_Task_Step03_Rename_View

Type = Table Execution Flag = Manual

SQL:

```
sp_rename 'Meeting_Task_Step02_Create_Tmp_View', 'Meeting_Task'
```

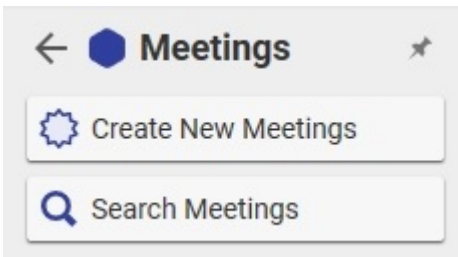
4. Click **Save** and **Done** to save and unlock the SQL Item.
5. Navigate to **Actions --> SQL Execute** in the SQL window.
6. Make sure that temporary view **Meeting_Task_Step02_Create_Temp_View** is renamed to Meeting.

Viewing New InBasket Task ItemType

1. Log on to Aras Innovator with administrative privileges.



2. Click **Meetings** in the TOC. In our example, we created a Meeting ItemType. The following menu appears:



3. Click **CreateNew Meeting** to create an instance of Meeting ItemType.
4. Provide the required information for the Meeting ItemType:
 - Container: Document
 - Name: Meeting Task
 - Start Date: Today
 - Due Date: Today+1
 - Status: Active
 - Assigned to: Administrators
 - Instructions: Activity Instructions 1
 - Item: Doc_1 (create if necessary)
5. Click Save, Done and Close.
6. Navigate to My Innovator --> InBasket.
7. Execute search.

The Meeting Task appears in the InBasket.

Aras Innovator - Internet Explorer

aras INNOVATOR®

File Edit View Search Actions Reports Tools Help

LOCAL TIME
Wednesday, October 15, 2014 4:49 PM

Contents Properties

InBasket

Created By: Innovator Admin
Created On: 10/15/2014
Modified By: Innovator Admin
Modified On: 10/15/2014
Major Rev: 1
Status: Pending

Type	Source Item	Activity	Start Date	Due Date	Status	Assigned To	Instructions	Work Item	My Assignment
Workflow Task	PR-100001	Verify PR			Pending	Owner	Please verify the Problem Report	PR-100001	☐
Workflow Task	PR-100001	Approve PR			Pending	Change Specialist 1	Please approve the Problem Report	PR-100001	☐
Workflow Task	ECO-00001001	Change Review			Pending	Change Control Board	Review changes made by the ECO	ECO-00001001	☐
Workflow Task	DCO-00001001	Final Review			Pending	Change Control Board	Review document changes	DCO-00001001	☐
Workflow Task	ECO-00001002	Change Review			Pending	Change Control Board	Review changes made by the ECO	ECO-00001002	☐
Workflow Task	DCO-00001002	Final Review			Pending	Change Control Board	Review document changes	DCO-00001002	☐
Workflow Task	ECO-00001001	Submit ECO	10/15/2014	10/15/2014	Active	Innovator Admin	Please fill out and submit the ECO	ECO-00001001	☒
Workflow Task	ECO-00001002	Submit ECO	10/15/2014	10/15/2014	Active	Innovator Admin	Please fill out and submit the ECO	ECO-00001002	☒
Workflow Task	DCO-00001001	Planning	10/15/2014	10/15/2014	Active	Innovator Admin	Perform DCO Planning	DCO-00001001	☒
Workflow Task	PR-100001	Review PR	10/15/2014	10/15/2014	Active	Change Specialist 1	Please Review the Problem Report	PR-100001	☐
Workflow Task	DCO-00001002	Planning	10/15/2014	10/15/2014	Active	Change Control Board	Perform DCO Planning	DCO-00001002	☐
Meeting Task	Doc 1	Activity Test 1	10/15/2014	10/17/2014	Pending	CRB	Activity Instructions 2	Doc 1	☐
Meeting Task	Doc 1	Activity 1	10/16/2014	10/22/2014	Active	Administrators	Activity Instructions 1	Doc 1	☒

Ready Innovator Admin andcwebv01 Solutions59775100Hema Items 1-13 of 13. Page 1 of 1 Messages: 0

Adding a New Column to the InBasket

The InBasket Task is a Poly Source Item. To add a new column or a new property to any of the Poly Source Items, you need to add the column or the property to all the other Poly Source Items as well as to the InBasket Task Item. Adding a new column to the InBasket involves five main procedures, which are described in the following sections. Let us consider the example of adding a column named Agenda to the newly created Meeting ItemType.

Important

If you add a column or a property to any of the Poly Source Items, ensure that it is added to other Poly Source Items and the InBasket Task Item. Else, an error is displayed.

Adding a new column to the New InBasket ItemType

1. Log on to Aras Innovator with administrative privileges.
2. Navigate to Administration --> ItemTypes.



- Search for the newly created InBasket ItemType in the search grid. Select the Item and open for editing. In our example, we have created the **Meeting** ItemType. Let us open the **Meeting** ItemType for editing. The Item window appears.

Meeting x

Meeting ☆

Edit [Icons]

ItemType

Name: Meeting

Singular Label: Meetings

Plural Label: Meetings

History Template: Default

Versioning: Versionable ☐ Discipline Automatic Revisions Default

Search: Auto Search ☐ Default Page Size 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

Show Parameters Tab: When Populated **Default Structure View:** Tabs Off **Class Structure:** [Button] **Small Icon:** [Button] **Large Icon:** [Button]

Properties RelationshipTypes Views Server Events Actions Life Cycles Workflows TOC Access TOC View Client Events Can Add Permissions Reports Po

Properties [Icons]

Name ↑	Label	Data Type	Data Source [...]	Le...	Pr...	Sc...	Req...	Uni...	Inde...	Hid...	Hid...	Align...	Width	Sort ...	Keyed Name ...	Or
assigned_to	Assigned To	Item	Identity				☐	☐	☐	☐	☐	Left		3072		
classification	Classification	String		512			☐	☐	☐	☒	☒	Left		128		
config_id		Item	Meeting				☒	☐	☐	☒	☒	Left		2688		

- Click null to unlock the ItemType.
- In the Properties tab, click null to create a new property. A blank row is added in the relationship grid.
- Provide the required information for the property. In our example, we add the details for Agenda column.
 - Name:** agenda
 - Label:** Agenda
 - Data Type:** Text
- Click null and null .

Adding the column to other Poly Source Items

- Log on to Aras Innovator with administrative privileges.



2. Navigate to Administration --> ItemTypes.
3. From the grid, search for InBasket Task **Item** and open the Item for editing.
4. Click the Poly Sources tab.

The Poly Source Items appear.

The screenshot shows the 'InBasket Task' configuration page. The 'Poly Sources' tab is selected, displaying a table of Poly Source Items. The table has columns for 'Name' and 'Description [...]'. The items listed are 'Workflow Task', 'Project Task', and 'Meeting Task'. The 'Meeting Task' row is highlighted in yellow.

Below the table, there are several tabs: Properties, RelationshipTypes, Views, Server Events, Actions, Life Cycles, Workflows, TOC Access, TOC View, Client Events, Can Add, Permissions, Reports, and Poly Sources. The 'Poly Sources' tab is currently active.

At the top of the configuration page, there are sections for 'Name', 'Singular Label', 'Plural Label', 'Show Parameters Tab', 'Default Structure View', 'History Template', 'Versioning', 'Search', 'Unlock On Logout', 'Dependent', 'Is Relationship', 'Enforce Discovery', 'Use Src Access', 'Allow Private Permissions', 'Implementation Type', and 'Enable for Secure Social'.

You need to edit and add the property to each of the Poly Source Items. Start with the **Workflow Task** Item.

5. Right-click on the **Workflow Task**, click **Open**. The Workflow Task Item window appears.



Workflow Task x

Workflow Task

Edit

ItemType

Name: Workflow Task

Singular Label: Workflow Task

Plural Label: Workflow Tasks

Show Parameters Tab: When Populated

Class Structure

History Template

Plural Label: Workflow Tasks

Default Structure View: Tabs Off

Small Icon

Large Icon

Versioning

Versionable: ☐

Discipline: Automatic

Revisions: Default

Search

Auto Search: ☐

Default Page Size:

Max Records:

Unlock On Logout: ☐

Dependent: ☐

Is Relationship: ☐

Enforce Discovery: ☒

Use Src Access: ☐

Allow Private Permissions: ☒

Implementation Type

Single Item: ☒

Poly Item: ☐

Federated Item: ☐

Enable for Secure Social

Properties RelationshipTypes Views Server Events Actions Life Cycles Workflows TOC Access TOC View Client Events Can Add Permissions Reports Poly Sources

Properties

Hidden

Name ↑	Label	Data Type	Data Source [...]	Le...	Pr...	Sc...	Req...	Uni...	Inde...	Hid...	Hid...	Align...	Width	Sort ...	Keyed Name ...	Order ...	Defa...
agenda	Agenda	Text					☐	☐	☐	☐	☐	Left		4608			
assigned_to	Assigned To	Item	Identity				☐	☐	☐	☐	☐	Left		4736			
classification	Classification	String		512			☐	☐	☐	☒	☒	Left		128			

- Click null to unlock the Workflow Task Item for editing.
- In the Properties tab, click null to create a new property.
A blank row is added in the relationship grid.
- Provide the required information for the property. Here we add the details for Agenda column.
 - Name:** agenda
 - Label:** Agenda
 - Data Type:** Text
- Click Save, Unlock and Close on the Workflow Task Item window.
- Repeat step 5 to step 9 for Meeting Task.
- Close the **InBasket Task** Item window.

Important

If adding a property of type Item, the behavior of this property must be set to *Fixed* on **InBasket Task** and all of its **Poly Sources**.

Rebuilding SQL Views

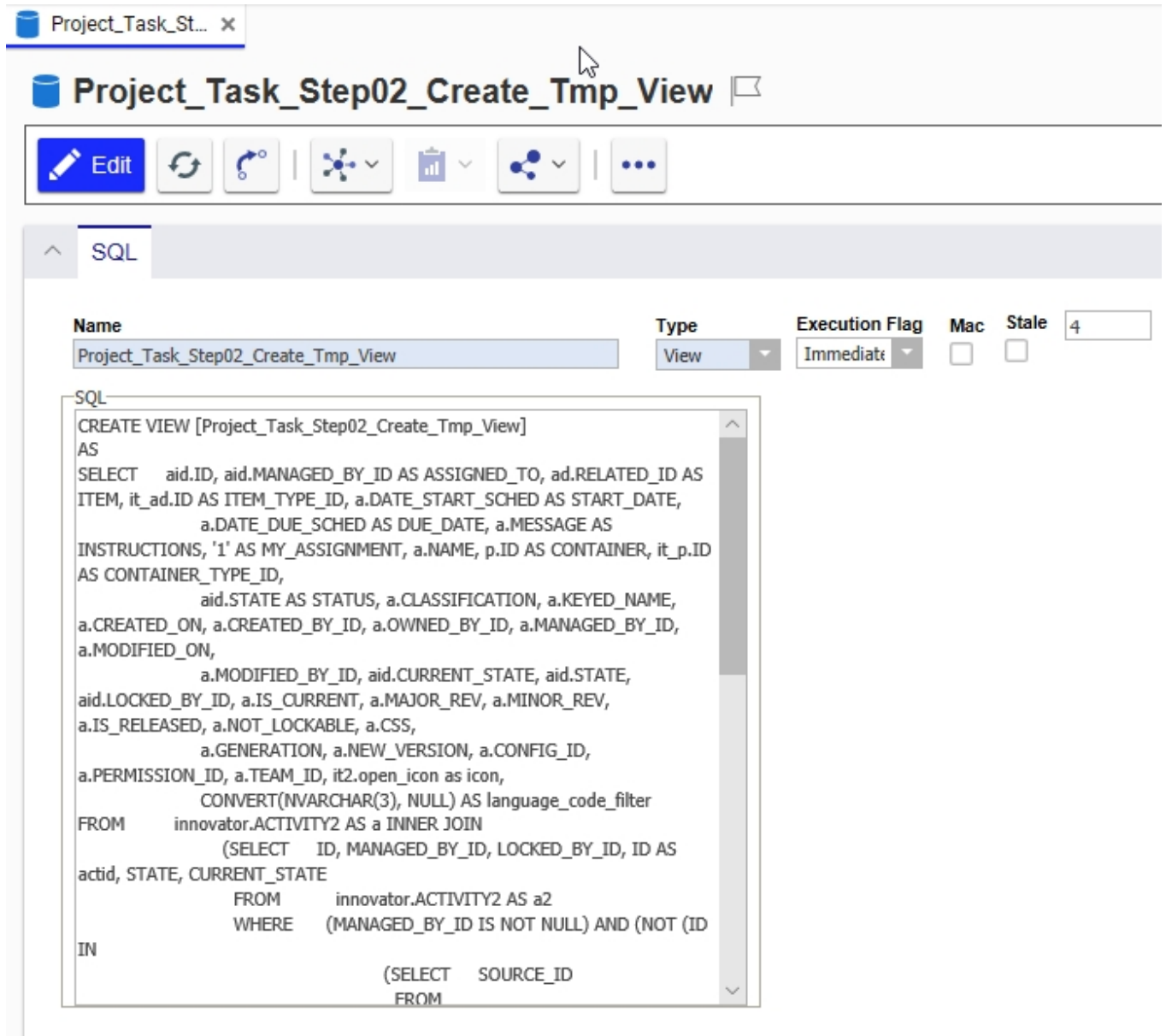
Rebuilding SQL View for New InBasket ItemType



1. Log on to Aras Innovator with administrative privileges.
2. Navigate to Administration --> SQLs.
3. Search for the Drop SQL View that we created for the new ItemType. In our example, we created `Meeting_Task_Step1_Drop SQL View`. For more information, refer to section [5.2.3 SQL Table and View Execution](#) .
4. Select `Meeting_Task_Step1_Drop` in the search grid, right-click and select **SQL Execute** from the context menu.
5. Search for the Create Temp SQL View that we created for the new ItemType. In our example, we created `Meeting_Task_Step02_Create_Temp_view` . For more information, refer to section [5.2.3 SQL Table and View Execution](#) .
6. Select `Meeting_Task_Step02_Create_Temp_view` in the search grid, right-click and select **Edit** from the context menu.
The SQL `Meeting_Task_Step02_Create_Temp_view` window is displayed.
7. Add the following line to the SQL field.

```
MEETING_TASK.Agenda AS AGENDA
```





Project_Task_Step02_Create_Tmp_View

SQL

Name: Project_Task_Step02_Create_Tmp_View

Type: View

Execution Flag: Immediate

Mac: ☐

Stale: ☐ 4

```

CREATE VIEW [Project_Task_Step02_Create_Tmp_View]
AS
SELECT aid.ID, aid.MANAGED_BY_ID AS ASSIGNED_TO, ad.RELATED_ID AS
ITEM, it_ad.ID AS ITEM_TYPE_ID, a.DATE_START_SCHED AS START_DATE,
a.DATE_DUE_SCHED AS DUE_DATE, a.MESSAGE AS
INSTRUCTIONS, '1' AS MY_ASSIGNMENT, a.NAME, p.ID AS CONTAINER, it_p.ID
AS CONTAINER_TYPE_ID,
aid.STATE AS STATUS, a.CLASSIFICATION, a.KEYED_NAME,
a.CREATED_ON, a.CREATED_BY_ID, a.OWNED_BY_ID, a.MANAGED_BY_ID,
a.MODIFIED_ON,
a.MODIFIED_BY_ID, aid.CURRENT_STATE, aid.STATE,
aid.LOCKED_BY_ID, a.IS_CURRENT, a.MAJOR_REV, a.MINOR_REV,
a.IS_RELEASED, a.NOT_LOCKABLE, a.CSS,
a.GENERATION, a.NEW_VERSION, a.CONFIG_ID,
a.PERMISSION_ID, a.TEAM_ID, it2.open_icon as icon,
CONVERT(NVARCHAR(3), NULL) AS language_code_filter
FROM innovator.ACTIVITY2 AS a INNER JOIN
(SELECT ID, MANAGED_BY_ID, LOCKED_BY_ID, ID AS
actid, STATE, CURRENT_STATE
FROM innovator.ACTIVITY2 AS a2
WHERE (MANAGED_BY_ID IS NOT NULL) AND (NOT (ID
IN
(SELECT SOURCE_ID
FROM

```

8. Click null and null to save and unlock the SQL Item.
9. Click Actions --> SQL Execute in the SQL window and then close the SQL window.
10. Search for the Rename SQL View that we created for the new ItemType.
In our example, we created `Meeting_Task_Step03_Rename_View` . For more information, refer to section [5.2.3 SQL Table and View Execution](#) .
11. Select `Meeting_Task_Step03_Rename_View` in the search grid, use right mouse button (right-click) and select **SQL Execute** from the context menu.

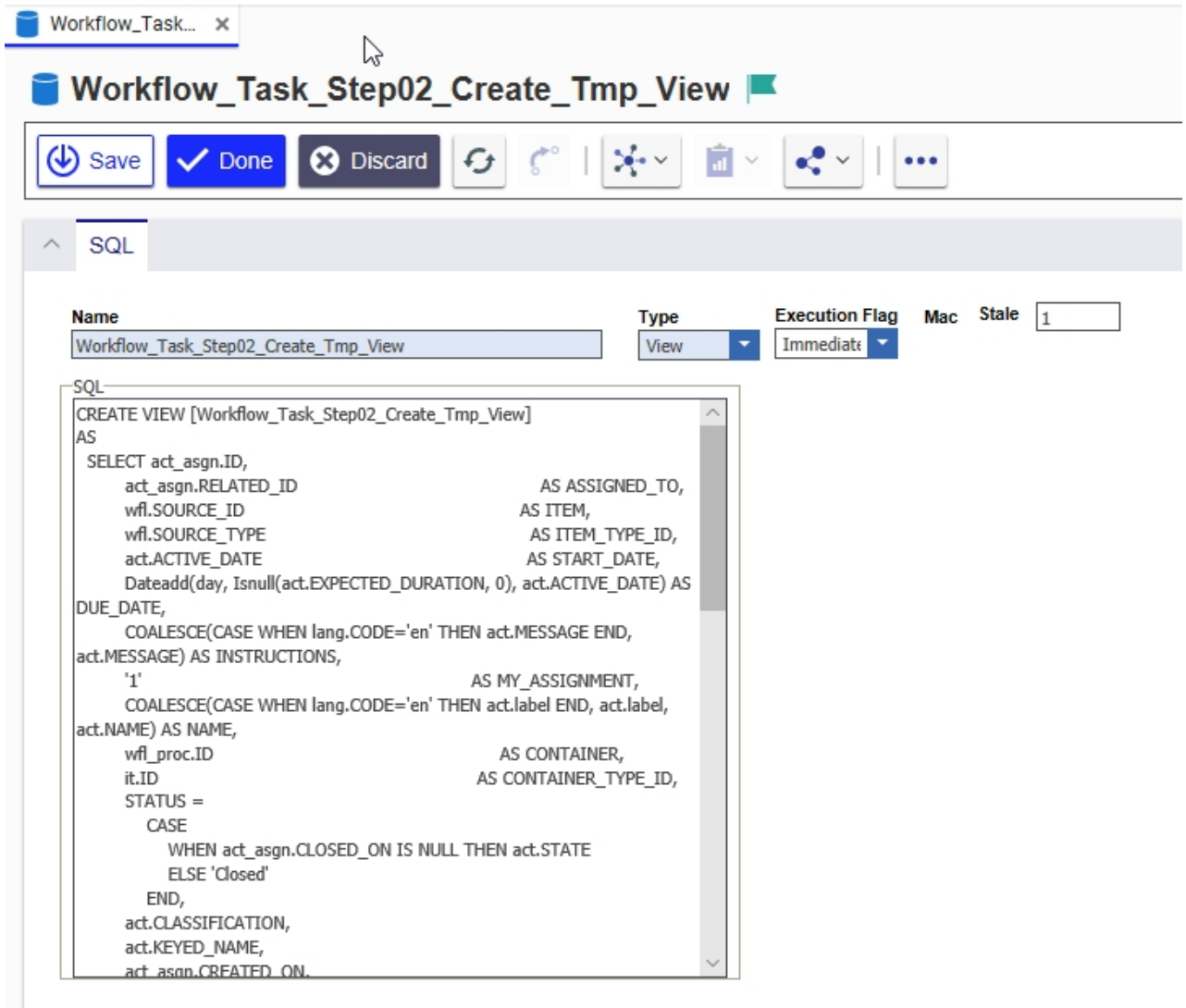
Rebuilding SQL View for Other Poly Source Items



1. Log on to Aras Innovator with administrative privileges.
2. Navigate to Administration --> SQLs.
3. Rebuild SQL view for Workflow Item Task.
 1. From the search grid, search `Workflow_Task_Step01_Drop` .
 2. Select `Workflow_Task_Step01_Drop` in the search grid, right-click and select **SQL Execute** from the context menu.
 3. From the search grid, open `Workflow_Task_Step02_Create_Tmp_View` .
 4. Click null to edit the `Workflow_Task_Step02_Create_Tmp_View`.
5. In SQL field, add the following line:

```
CONVERT(NVARCHAR(128), NULL) AS AGENDA,
```





6. Click null and null to save and unlock the SQL Item.
7. Click **SQL Execute** from the **Actions** menu.
8. Close the window.
9. From the search grid, search **Workflow_Task_Step03_Rename_View** .
10. Select **Workflow_Task_Step03_Rename_View** in the search grid, use the right mouse button (right-click) and select **SQL Execute** from the context menu.

Adding the column to the InBasket Task Item

1. Log on to Aras Innovator with administrative privileges.
2. Navigate to Administration --> ItemType.
3. From the grid, search for Workflow Task Item and click null .



4. Save, unlock, and close the Workflow Task Item.
5. Repeat steps 3 and 4 for the Meeting Task Item.

Important

InBasket Task won't let you edit and save the Item Type until after you've saved, unlocked, and closed the Poly Items connected to it.

6. From the grid, search for InBasket Task Item and click null .
7. In the Properties tab, click null to create a new property.
A blank row is added in the relationship grid.
8. Provide the required information for the property. In our example, we add the details for Agenda column.
 - **Name:** agenda
 - **Label:** Agenda
 - **Data Type:** Text



InBasket Task

Save

Done

Discard

ItemType

Name

InBasket Task

History Template

Versioning

Versionable

Discipline

Automatic

Revisions

Default

Search

Auto Search

Default Page Size

25

Max Records

Unlock On Logout

Dependent

Is Relationship

Enforce Discovery

Use Src Access

Allow Private Permissions

Implementation Type

Single Item

Poly Item

Federated Item

Show Parameters Tab

When Populated

Class Structure

Default Structure View

Tabs Off

Small Icon

Select an image...

Large Icon

Select an image...

Properties

Relationship Types

Views

Server Events

Actions

Life Cycles

Workflows

TOC Access

TOC View

Client Events

Can Add

Permissions

Reg...

Properties

Hidden

Name	Label	Data Type	Data Source [...]	Length	Pr...	Sc...	Req...	Uni...	Inde...	Hid...	Hid...	Align...	Width	Sort ...
minor_rev		String		8			☐	☐	☐	☒	☒	Left		2048
modified_by_id		Item	User				☐	☐	☐	☒	☒	Left		1280
modified_on		Date					☐	☐	☐	☒	☒	Left		1152
my_assignment	My Assignment	Boolean					☐	☐	☐	☐	☐	Center		1152
name	Activity	String		128			☐	☐	☐	☐	☐	Left	160	384
new_version		Boolean					☐	☐	☐	☒	☒	Left		2688
not_lockable	Not Lockable	Boolean					☐	☐	☐	☒	☒	Left		2304
owned_by_id		Item	Identity				☐	☐	☐	☒	☒	Left		896
permission_id		Item	Permission				☒	☐	☐	☒	☒	Left		2944
start_date	Start Date	Date					☐	☐	☐	☐	☐	Left	80	512
state		String		32			☐	☐	☐	☒	☒	Left		1536
status	Status	String		64			☐	☐	☐	☐	☐	Left	80	768
team_id	Team	Item	Team				☐	☐	☐	☒	☒	Left		3072
agenda	agenda	Text					☐	☐	☐	☐	☐	Left		

9. Click Save, Unlock and Close in the **InBasket Task** Item window.

Viewing the New Column in Configurable InBasket

1. Log on to Aras Innovator with administrative privileges.
2. Navigate to My Innovator --> My InBasket.

The InBasket search grid displays the newly added column. In our example, we can now see the newly added column **Agenda [...]**.



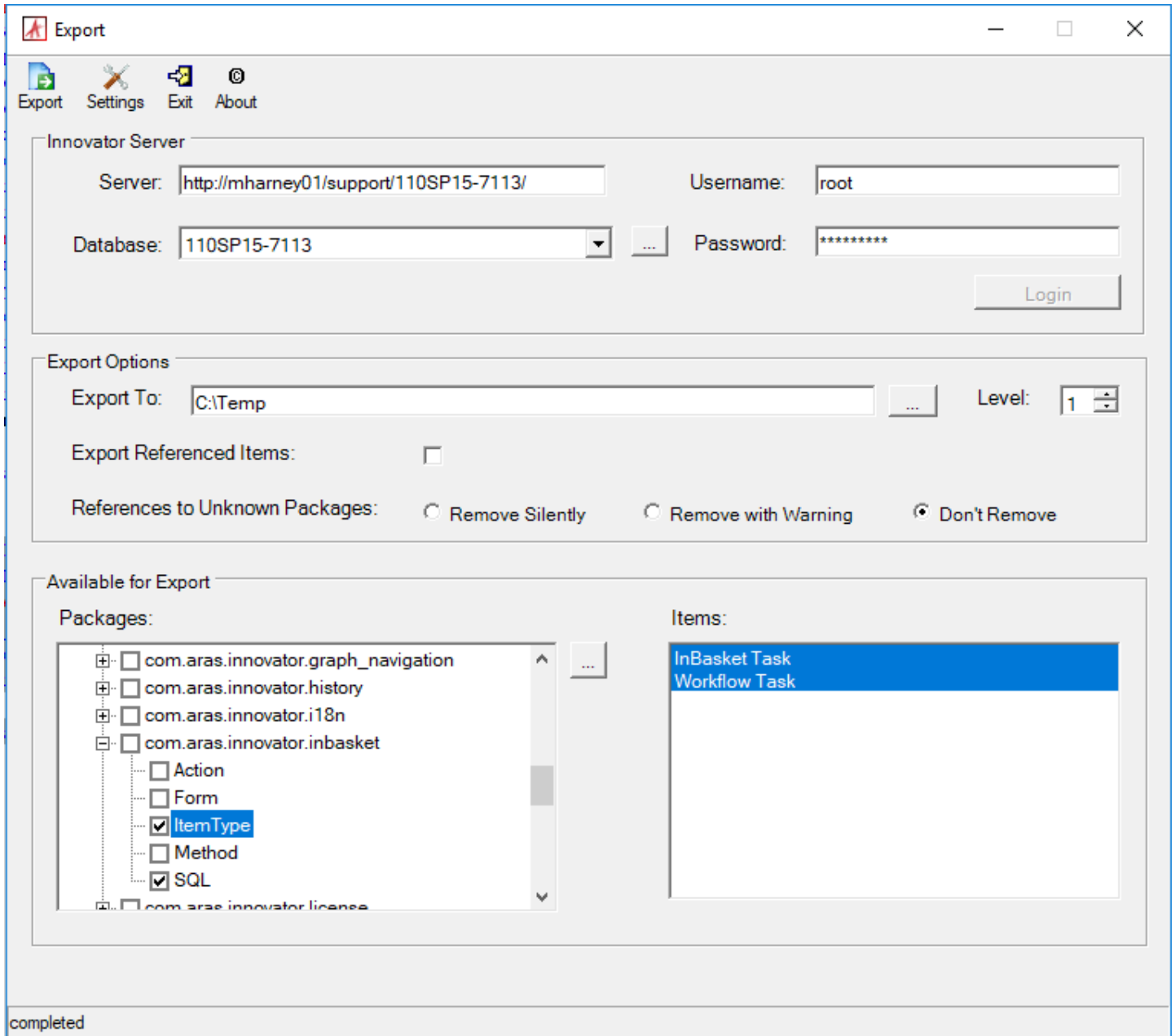
Type	Source Item	Activity	Start Date [...]	Due Date [...]	Status	Assigned To [...]	Instructions	Work Item	My Assignment	Agenda [...]
Workflow Task	PR-100001	Verify PR			Pending	Owner	Please verify the Problem Report	PR-100001	☐	
Workflow Task	PR-100001	Approve PR			Pending	Change Specialist 1	Please approve the Problem Report	PR-100001	☐	
Workflow Task	ECO-00001001	Change Review			Pending	Change Control Board	Review changes made by the ECO	ECO-00001001	☐	
Workflow Task	DCO-00001001	Final Review			Pending	Change Control Board	Review document changes	DCO-00001001	☐	
Workflow Task	ECO-00001002	Change Review			Pending	Change Control Board	Review changes made by the ECO	ECO-00001002	☐	
Workflow Task	DCO-00001002	Final Review			Pending	Change Control Board	Review document changes	DCO-00001002	☐	
Workflow Task	ECO-00001001	Submit ECO	10/15/2014	10/15/2014	Active	Innovator Admin	Please fill out and submit the ECO	ECO-00001001	☒	
Workflow Task	ECO-00001002	Submit ECO	10/15/2014	10/15/2014	Active	Innovator Admin	Please fill out and submit the ECO	ECO-00001002	☒	
Workflow Task	DCO-00001001	Planning	10/15/2014	10/15/2014	Active	Innovator Admin	Perform DCO Planning	DCO-00001001	☒	
Workflow Task	PR-100001	Review PR	10/15/2014	10/15/2014	Active	Change Specialist 1	Please Review the Problem Report	PR-100001	☐	
Workflow Task	DCO-00001002	Planning	10/15/2014	10/15/2014	Active	Change Control Board	Perform DCO Planning	DCO-00001002	☐	
Meeting Task	Doc 1	Activity Test 1	10/15/2014	10/17/2014	Pending	CEO	Activity Instructions 2	Doc 1	☐	
Meeting Task	Doc 1	Activity 1	10/16/2014	10/22/2014	Active	Administrators	Activity Instructions 1	Doc 1	☒	

Creating an Import Package to add a Column

When creating an import package that adds a column to the Configurable InBasket you must ensure that the order in which the property is added to the PolyItems is correct or the import will fail. In the example below there are steps on how to create a package that will add a column that shows the Part_Number of an InBasket task.

1. From the source database, use the Export tool to export the Workflow_Task and InBasket_Task ItemTypes, and their corresponding SQL queries
 - The Workflow_Task and InBasket_Task ItemTypes, and SQL queries are located in the com.aras.innovator.inbasket package definitions





2. From the InBasket_Task.xml you will need to remove the following lines (typically located near the end of the file):



```

<Item type="ItemType" id="BC7977377FFF40D59FF14205914E9C71" action="edit">
  <Relationships>
    <Item type="Morphae" id="9657383E1C64B86A806E17CDD20A23" action="add">
      <related_id keyed_name="Workflow Task" type="ItemType" name="Workflow Task">321BD822949149C597FD596B1212B85C</related_id>
      <sort_order>128</sort_order>
      <source_id keyed_name="InBasket Task" type="ItemType" name="InBasket Task">BC7977377FFF40D59FF14205914E9C71</source_id>
    </Item>
  </Relationships>
</Item>
<Item type="ItemType" id="BC7977377FFF40D59FF14205914E9C71" action="edit">
  <Relationships>
    <Item type="Morphae" id="DE32C8E3C356483A896D36443CB8A288" action="add">
      <source_id keyed_name="InBasket Task" type="ItemType" name="InBasket Task">BC7977377FFF40D59FF14205914E9C71</source_id>
    </Item>
  </Relationships>
</Item>

```

Important

It is recommended you copy and paste the above lines for future use in the upcoming steps.

- From the InBasket_Task.xml you will need to remove the new column property (shown below) to avoid errors during the import.

```

<Item type="Property" id="6DCBE94B46044404B74F15A613A02811" action="add">
  <column_alignment>left</column_alignment>
  <data_type>string</data_type>
  <is_hidden>0</is_hidden>
  <is_hidden2>0</is_hidden2>
  <is_indexed>0</is_indexed>
  <is_keyed>0</is_keyed>
  <is_multi_valued>0</is_multi_valued>
  <is_required>0</is_required>
  <label xml:lang="en">test</label>
  <range_inclusive>0</range_inclusive>
  <readonly>0</readonly>
  <sort_order>4608</sort_order>
  <source_id keyed_name="InBasket Task" type="ItemType" name="InBasket Task">BC7977377FFF40D59FF14205914E9C71</source_id>
  <stored_length>32</stored_length>
  <track_history>0</track_history>
  <name>test</name>
</Item>

```

- In the new import package folder, create an ... /Imports/Fixes folder
- Inside the fixes folder you will add the xml files shown below:
 - Workflow_Task.xml
 - InBasket_Task.xml
- 1 Workflow_Task.xml will look something like the following:



```

<AML>
<Item type="ItemType" id="321BD822949149C597FD596B1212B85C" action="edit">
<Relationships>
<Item type="Property" id="EB9B7F4B06064C378EF5CEC3E94FB58E" action="add">
<column_alignment>left</column_alignment>
<data_type>string</data_type>
<is_hidden>0</is_hidden>
<is_hidden2>0</is_hidden2>
<is_indexed>0</is_indexed>
<is_keyed>0</is_keyed>
<is_multi_valued>0</is_multi_valued>
<is_required>0</is_required>
<label xml:lang="en">test</label>
<range_inclusive>0</range_inclusive>
<readonly>0</readonly>
<sort_order>4608</sort_order>
<source_id keyed_name="Workflow Task" type="ItemType" name="Workflow Task">321BD822949149C597FD596B1212B8
<stored_length>32</stored_length>
<track_history>0</track_history>
<name>test</name>
</Item>
</Relationships>
</Item>
<Item type="ItemType" id="BC7977377FFF40D59FF14205914E9C71" action="edit">
<Relationships>
<Item type="Morphae" id="9657383E16C64B86AB06E17CDD20AE23" action="add">
<related_id keyed_name="Workflow Task" type="ItemType" name="Workflow Task">321BD822949149C597FD596B1212B
<sort_order>128</sort_order>
<source_id keyed_name="InBasket Task" type="ItemType" name="InBasket Task">BC7977377FFF40D59FF14205914E9C
</Item>
</Relationships>
</Item>
</AML>

```

The code highlighted in yellow is taken from the exported Workflow_Task.xml where the information is that of the property that will be used for the new column. The code highlighted in green is taken from the deleted lines of the InBasket_Task.xml.

2. 3 Inbasket_task.xml will only include code to add the new column property as shown below:



```

<AML>
<Item type="ItemType" id="BC7977377FFF40D59FF14205914E9C71" action="edit">
<Relationships>
<Item type="Property" id="6DCBE94B46044404B74F15A613A02811" action="add">
<column_alignment>left</column_alignment>
<data_type>string</data_type>
<is_hidden>0</is_hidden>
<is_hidden2>0</is_hidden2>
<is_indexed>0</is_indexed>
<is_keyed>0</is_keyed>
<is_multi_valued>0</is_multi_valued>
<is_required>0</is_required>
<label xml:lang="en">test</label>
<range_inclusive>0</range_inclusive>
<readonly>0</readonly>
<sort_order>1024</sort_order>
<source_id keyed_name="InBasket Task" type="ItemType" name="InBasket Task">BC7977377FFF40D59FF14205914E9C
<stored_length>1024</stored_length>
<track_history>0</track_history>
<name>test</name>
</Item>
</Relationships>
</Item>
</AML>

```

Important

You will need to generate a new ID for the added property. To do this you can go through the following steps:

Important

From a browser, go to <http://localhost/innovator/client/scripts/nash.aspx>

Important

Fill in Login information for the appropriate target database

Important

Under Action select generateNewGUID

Important

Click on Submit

Important



Copy the newly generated ID and add that to the 3 Inbasket_Task.xml file in the highlighted area above

6. To ensure that the fixes folder is imported with the import tool, you will need to add the path as follows:

```
<package name="com.aras.innovator.solution.InBasketFix" path="InBasketFix\Import">  
<dependson name="com.aras.innovator.inbasket" />  
</package>
```

Managing Language Preferences

It is possible to set up the Configurable InBasket to handle multiple languages so that it selects the values appropriate to the client environment. The following sample shows how to adjust the InBasket to handle the German locale:

1. Edit the `Workflow_Task_Step02_Create_Tmp_View` SQL item.
 1. Open the `Workflow_Task_Step02_Create_Tmp_View` SQL item for editing.
 2. Change the query for **Instructions** column:

From:

```
COALESCE(CASE WHEN lang.CODE='en' THEN act.MESSAGE END, act.MESSAGE) AS
```

To:

```
COALESCE(CASE WHEN lang.CODE='en' THEN act.MESSAGE  
WHEN lang.CODE='de' THEN act.MESSAGE_DE END,  
act.MESSAGE) AS INSTRUCTIONS,
```

3. Change the query for **Activity** column:

From:

```
COALESCE(CASE WHEN lang.CODE='en' THEN act.label END, act.label, act.NA
```

To:



```
COALESCE(CASE WHEN lang.CODE='en' THEN act.LABEL  
WHEN lang.CODE='de' THEN act.LABEL_DE END,  
act.LABEL, act.NAME) AS NAME,
```

4. Save, unlock, and close the `Workflow_Task_Step02_Create_Tmp_View` SQL item.
2. Rebuild SQL view for Workflow Item Task.
 1. From the search grid, search for `Workflow_Task_Step%` SQL items.
 2. Right-click on `Workflow_Task_Step01_Drop` in the search grid and select **SQL Execute** from the context menu.
 3. Right-click on `Workflow_Task_Step02_Create_Tmp_View` in the search grid and select **SQL Execute** from the context menu.
 4. Right-click on `Workflow_Task_Step03_Rename_View` in the search grid and select **SQL Execute** from the context menu.

