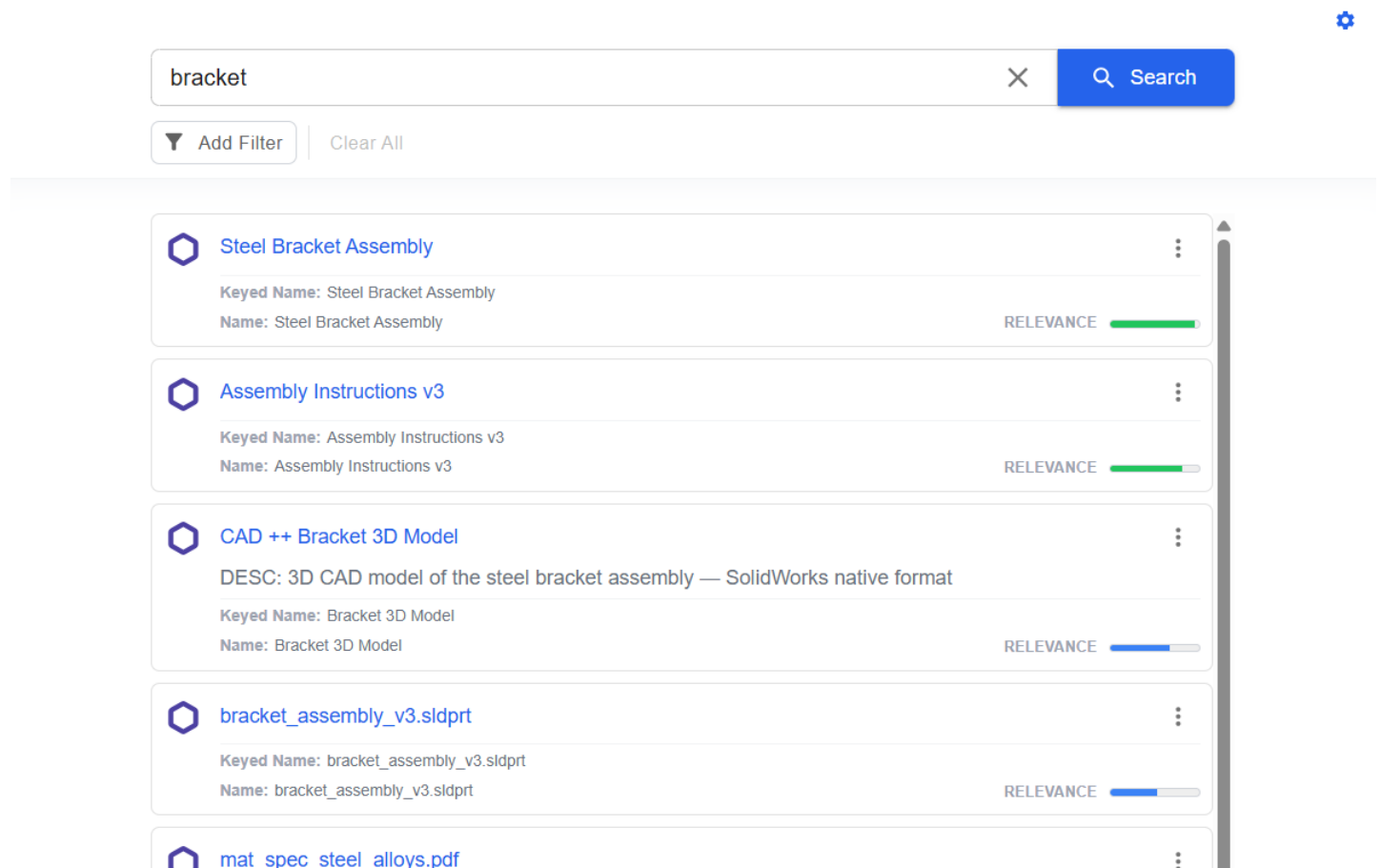


AI Search - User Guide

Visibility and Access Modes

AI Search replaces the standard Enterprise Search entry point in Aras Innovator®.

Typing a query into the search field in the Aras Innovator header opens AI Search as a tab within the Aras Innovator interface.



Accessing AI Search in Aras Innovator

Type a query into the search field in the Aras Innovator header to open the AI Search tab. The tab opens in Aras Innovator's standard tab interface. If an AI Search tab is already open for the same query, Aras Innovator navigates to it rather than opening a new one.

Once the tab is open, you can also run searches directly from the search bar within the tab. Both the



header field and the in-tab search bar accept the same natural language queries and return the same results.

Admin Panel Access

Administrators see a gear icon in the top-right corner of the AI Search tab. Selecting it opens the AI Search Admin panel, where indexing scope and search presentation settings are configured. This button is visible only to users with administrator access. For full Admin panel documentation, see the separate AI Search Admin guide.

Interacting with AI Search

Before you search

When you first open the dedicated AI Search page and have not run a search yet, the results area shows Ready to Search with a short description and example query chips, such as:

- "123 module description"
- "Body parts with Preliminary state"
- "Cylinder head manual"
- "Latest modified CAD documents"

Select any example chip to run that search immediately.

Running a search

Type a plain language query into the search bar in the AI Search tab and select **Search**. You can also type into the Aras Innovator header search field to start a new search from outside the tab. Describe what you are looking for in everyday language: a concept, a material, a function, or a design intent. AI Search matches by meaning rather than by exact keyword.

You can also press **Enter** in the search box to run the search.

While a search is in progress, the **Search** button is disabled until the current request completes or is stopped.

The **X** icon inside the search box clears the text you typed. It does not clear existing results or reset the page. To reset after a failed or empty search, use **Clear search and try again** in the results area. Queries must be at least 3 characters long. Submitting a shorter query shows the following message:



Search query too short
Please enter at least 3 characters to search. Try a longer keyword or phrase.

Select **Clear search and try again** to reset the search field and enter a new query.



Search query too short

Please enter at least 3 characters to search. Try a longer keyword or phrase.

[Clear search and try again](#)

While a search is running

If a search takes longer than a few seconds, an information banner appears:

Your search is still running
Results will appear as soon as they're ready.

Select **Stop** to cancel the in-progress search. Partial results are not kept after you stop.

Loading more results

Search results are returned in pages. When more results are available, a **Load More** button appears at the bottom of the result list.

Select **Load More** to fetch the next page using the same search query and applied filters as the current result set. **Load More** does not apply staged filter changes. If you have edited filters but not yet selected **Apply Filters**, pagination continues with the previously applied filter set.

While additional results are loading, the button shows *Loading...* and is disabled.



Search Filters

Use filters to narrow semantic search results after you enter a search query. Filters are built in the filter panel below the search bar; active filters appear as chips above the panel.

Search

is_released = trueitem_type = CAD Document,...

Add FilterClear AllApply Filters

CancelAdd Filter

Add New Filter

PropertyModified A...afterValuemm/dd/yyyy

September 2026

SuMoTuWeThFrSa

303112345

6789101112

13141516171819

20212223242526

27282930123

45678910

ClearToday

Steel Bracket Assembly

Keyed Name: Steel Bracket Asser

Name: Steel Bracket Assembly

Assembly Instructions v3

Keyed Name: Assembly Instructio

Name: Assembly Instructions v3

CAD ++ Bracket 3D Model

DESC: 3D CAD model of the steel bracket assembly — SolidWorks native format

Keyed Name: Bracket 3D Model

Name: Bracket 3D Model

RELEVANCE

RELEVANCE

RELEVANCE

Staged and Applied Filters

The search page keeps two filter states:

State	Meaning
Staged filters	Filters you have added, edited, or removed in the UI but not yet sent to the search service
Applied filters	Filters that were included in the last search request



Search results always reflect **applied** filters. Changes you make in the filter builder are **staged** until you apply them or run a new search.

Adding a Filter

1. Enter a search query and run the search.
2. Select **Add Filter** to open the filter builder.
3. Select a **property** (field).
4. Choose a **value**. The control depends on the property type (see **Available Filter Properties** below).
5. Select **Add Filter** in the builder to save the filter to the staged list.

The filter appears as a chip above the filter panel. It does **not** change results until you apply it.

Cancel Add Filter

Add New Filter

Property equals Value

Item Type

Is Current

Is Current: 1

Important

Each property can be used once at a time. After you add an Item Type filter, that property is no longer available in the dropdown until you remove that filter.

When all available filter properties are in use, **Add Filter** is disabled.

- Duplicate filters (same property and value) are rejected with a warning notification.
- Select **Cancel** to close the builder without saving.
- If the Item Type list fails to load, an inline error is shown with a **Retry** option.

Available Filter Properties



Filter	Values
Item Type	Any ItemType configured for indexing in your instance. More than one type can be selected in a single filter.
Is Current	True or False
State	Any text. The filter uses a contains match; typing part of a state name is enough. Exact text is not required and wildcards are not needed.
Modified After	A date. Returns items modified on or after the selected date.
Modified Before	A date. Returns items modified on or before the selected date. Cannot be set to a date earlier than Modified After when both filters are active.
Is Released	True or False

The Item Type list is loaded from your instance's index configuration.

Filter Chips

Staged filters are shown as chips in a row below the search bar (up to 8 visible; select ...N More Filters to expand or Hide N Filters to collapse).

Each chip displays: Property = Value (for example, **Item Type = Part** or **Is Current = True**).

Chip Colors

Appearance	Meaning
Blue (primary) outline	Applied: this filter was included in the last search
Gray outline	Staged only: added or changed, but not yet applied to results

After you add, edit, or remove a filter, affected chips turn gray until you apply changes.

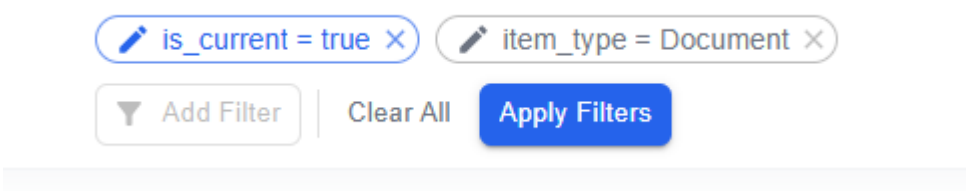
Chip Actions

Action	How	Effect
Edit	Select the pencil icon on the chip	Opens the filter builder in edit mode with current values



Remove	Select the X on the chip	Removes that filter from the staged list only
--------	--------------------------	--

Removing or editing a chip does not immediately update results. You must select **Apply Filters** or run the search again.



Applying Filters

- The **Apply Filters** button appears when staged filters differ from applied filters, for example, after adding a filter, editing one, removing one, or selecting **Clear All**.
- Select **Apply Filters** to copy staged filters to applied filters and re-run the search with the current query and filters.
- **Apply Filters** is disabled while a search is already in progress.
- Staged filters are also applied automatically when you press **Enter** in the search box or select the **Search** button. In those cases, the latest staged filters are sent with the search request.

Clearing Filters

- **Remove one filter:** Select the X on a chip. The filter is removed from the staged list. If it was previously applied, results stay unchanged until you select **Apply Filters** or search again.
- **Clear all filters:** Select Clear All to remove all staged filters and close any open filter builder. Clear All does not run a search by itself. If applied filters were active, Apply Filters appears so you can refresh results without those filters.

Result Ordering

There is no **Sort by** control. Results are always ordered by relevance, the semantic search score, and this order cannot be changed.

Filter Behavior Summary

Action	Applies staged filters?	Updates results immediately?
Add / edit filter in builder	No (staged only)	No



Remove chip or Clear All	No (staged only)	No
Apply Filters	Yes	Yes
Search or Enter	Yes	Yes
Load More	No — uses previously applied filters	Yes (next page only)

Typical Workflows

Narrow Results After Searching

1. Search for a term such as `battery housing`.
2. Select **Add Filter > Item Type** > choose a type > **Add Filter**.
3. The chip appears in gray (staged).
4. Select **Apply Filters**.
5. The chip turns blue; results show only matching items.

Change an Existing Filter

1. Select the pencil icon on a filter chip.
2. Change the value and click **Update Filter**.
3. The chip turns gray (staged).
4. Select **Apply Filters** to refresh results.

Remove All Filters and Refresh

1. Select **Clear All**.
2. Select **Apply Filters** to search again without filters.

Understanding Results

Each result is presented as a card. The card title is derived from the title template an administrator has configured for that ItemType, or from the item's `keyed_name` if no template is set. The card subtitle follows the same pattern. Each card shows an item type icon and a relevance indicator, a colored bar that reflects how closely the result matches the query:

Bar color	Relevance level
Green	High
Blue	Medium



Orange	Low
Gray	Lowest



×
🔍 Search

✎ is_released = true ✕
✎ item_type = CAD Document,... ✕

⌵ Add Filter
Clear All
Apply Filters

Steel Bracket Assembly

Keyed Name: Steel Bracket Assembly
Name: Steel Bracket Assembly

RELEVANCE

Assembly Instructions v3

Keyed Name: Assembly Instructions v3
Name: Assembly Instructions v3

RELEVANCE

CAD ++ Bracket 3D Model

DESC: 3D CAD model of the steel bracket assembly — SolidWorks native format
Keyed Name: Bracket 3D Model
Name: Bracket 3D Model

RELEVANCE

bracket_assembly_v3.sldprt

Keyed Name: bracket_assembly_v3.sldprt
Name: bracket_assembly_v3.sldprt

RELEVANCE

mat_spec_steel_alloys.pdf

Keyed Name: mat_spec_steel_alloys.pdf

RELEVANCE

When a search matches content at the file chunk level, the relevant chunk appears as its own result entry. Each chunk result shows a reference link back to the file it belongs to.

Expanding a Result Card

Select the expand control on a card to see additional detail. Expanded cards show the text excerpts from indexed files that made the item relevant, grouped by source and annotated with the file name. Expanded cards also show indexed property snippets that matched your query. For example, a



Content field for matched file text. Property labels are shown using administrator-configured names where available.

Selecting the card title or the expanded card header opens the item record directly in Aras Innovator, where you can view, edit, and navigate the item using all standard Aras Innovator functions.

File Results and Related Items

When a result is a file item type, expanding the card may also show a Related items: section listing parent items linked to that file (for example, the CAD document or part the file belongs to). Each related item shows its item type icon and name. Select a related item to open it in Aras Innovator. If related items cannot be loaded, a warning message Could not load related items. is shown inside the expanded card.

Result Detail Drawer

Selecting the detail control on a result card opens a side drawer. The drawer shows the item header, item type, keyed name, and identifier, along with matched excerpts grouped by file source. The results list remains visible and in position behind the drawer.

The drawer closes on the Escape key or the close button at the top of the panel. The scroll position in the results list is preserved when the drawer closes.

Keyboard navigation is available throughout search results. Arrow keys move through the results list. Tab and Shift+Tab move between interactive elements on a card. Enter opens the detail drawer for the currently selected result.

Error and Empty States

The table below lists the main messages shown in the results area, with the action available on each screen.

Screen title	Message	What to do
<i>Ready to Search</i>	Search across all CAD documents, parts, and engineering manuals. Example query chips are shown.	Enter a query or select an example chip to begin.
<i>Search query too short</i>	Please enter at least 3 characters to search. Try a longer keyword or phrase.	Select Clear search and try again , then enter a longer query.
<i>No Matches Found</i>	We couldn't find anything matching your query. Check your spelling or try including more general keywords.	Rephrase the query, adjust filters, or select Clear search and try again .



<i>No results found (with filter guidance)</i>	Try using more specific keywords or applying filters to narrow your search.	Shown when the result limit is reached with no visible matches. Refine the query or add filters.
<i>The Index Is Not Ready Yet or Is Currently Unavailable</i>	The centralized search index is currently unavailable, rebuilding, or temporarily locked by an administrator. Your search cannot return live results at this time.	Wait and try again later, or contact your Aras Innovator administrator. This indicates the search index itself is not ready, not a temporary network error.
<i>Search service is temporarily unavailable</i>	We could not complete your search right now. This is usually a temporary issue.	Select Search again to retry. This indicates a transient service error, distinct from the index-not-ready state.
<i>Invalid search syntax</i>	The search query contains invalid characters or syntax. Please revise your search and try again.	Remove or correct special characters or syntax in the query.
<i>Could not load related items.</i>	Shown inside an expanded file result card when parent items fail to load.	Expand another result or open the file item directly in Aras Innovator.
Search is taking longer than expected	Your search has been running for 30 seconds. Try applying filters or using more specific search terms to narrow the result set.	Add filters or refine the query, then search again.
Date filter range invalid	Modified Before cannot be set to a date earlier than Modified After	Correct the date range in the filter panel before applying filters.

Important Guidelines

AI Search results never exceed your existing Aras Innovator permissions. You only see items and files you are already authorized to see in standard Aras Innovator search. AI Search does not grant any new access.

Customer data is not used to train AI models. Content indexed by AI Search and queries submitted to it are not used to train, retrain, or improve any general purpose or shared AI model. See the Aras InnovatorEdge Product Specific Terms for full details.

Known Behaviors

The following behaviors are present in version 1.1.0 and are expected to be addressed in a future release.

The **Is Current** filter is accepted by the UI but is not applied to search results. Adding an **Is Current** filter and selecting **Apply Filters** does not restrict results to current or non-current items. Do not rely on this filter to limit results by version status in this release.

Semantic Search via Edge API Query-on-the-fly



AI Search results can also be consumed through Edge API's Query-on-the-fly capability, allowing search to be combined with other governed Edge API data access in the same request flow. See the Edge API Query-on-the-fly documentation for details.

