

Discussion Templates

The Secure Social Messaging Subsystem allows the end user to post secure messages in the context of Innovator Items, reply to secure messages to create Secure Message Threads, and aggregate secure messages and/or history events into Discussions.

When an end user opens the Discussion Panel in an item window, the user sees Secure Messages which are either entered by other users or which come in an automated way from History records. Each discussion represents a set of Secure Messages aggregated from various Boards directly or through other discussions (recursively).

The administrator has the capability to aggregate the secure messages in this discussion panel by configuring the **Discussion Template** of the associated ItemType.

The aggregation of the Secure Messages occurs based on either DiscussionTemplate associated with the item's ItemType or **DiscussionDefinition** associated with the item.

When an ItemType is enabled for social content, it has at least one **DiscussionTemplate** associated with it. The administrator has the capability of configuring the **DiscussionTemplate** of an ItemType or the **DiscussionDefinition** associated with the item.

DiscussionTemplate

The **DiscussionTemplate** is a relationship type with ItemType as its source. The **DiscussionTemplate** serves the following purposes:

- Defines **Feeds** that are used for aggregating Secure Messages and History records for items of this type.
- Defines **FileSelector** that are used for finding **Files** associated with the items of this type.

An administrator can make configurations to the **DiscussionTemplate** by doing the following:

1. Login to Aras Innovator as an administrator.
2. Go to Contents --> Administration --> ItemTypes.
3. Run the search and open an ItemType, for example **Document** ItemType, for edit.
4. Select the **SecureSocial** tab.



5. Click the New Discussion Template button in the Relationship toolbar to add a new DiscussionTemplate in the relationship grid.

Document x

Document ☆

Save Done Discard

Item Type

Name: Document
Singular Label: Document
Show Parameters Tab: Never
Class Structure

History Template: Default
Plural Label: Documents
Default Structure View: Tabs On
Small Icon: Select an image...

Versioning: Versionable (checked), Discipline: Automatic, Revisions: Default

Search: Auto Search (unchecked), Default Page Size: 25, Max Records

Implementation Type: Single Item (selected), Poly Item, Federated Item

Permissions: Unlock On Logout (unchecked), Dependent (unchecked), Is Relationship (unchecked), Enforce Discovery (checked), Use Src Access (unchecked), Allow Private Permissions (checked)
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 Client Style Secure Social

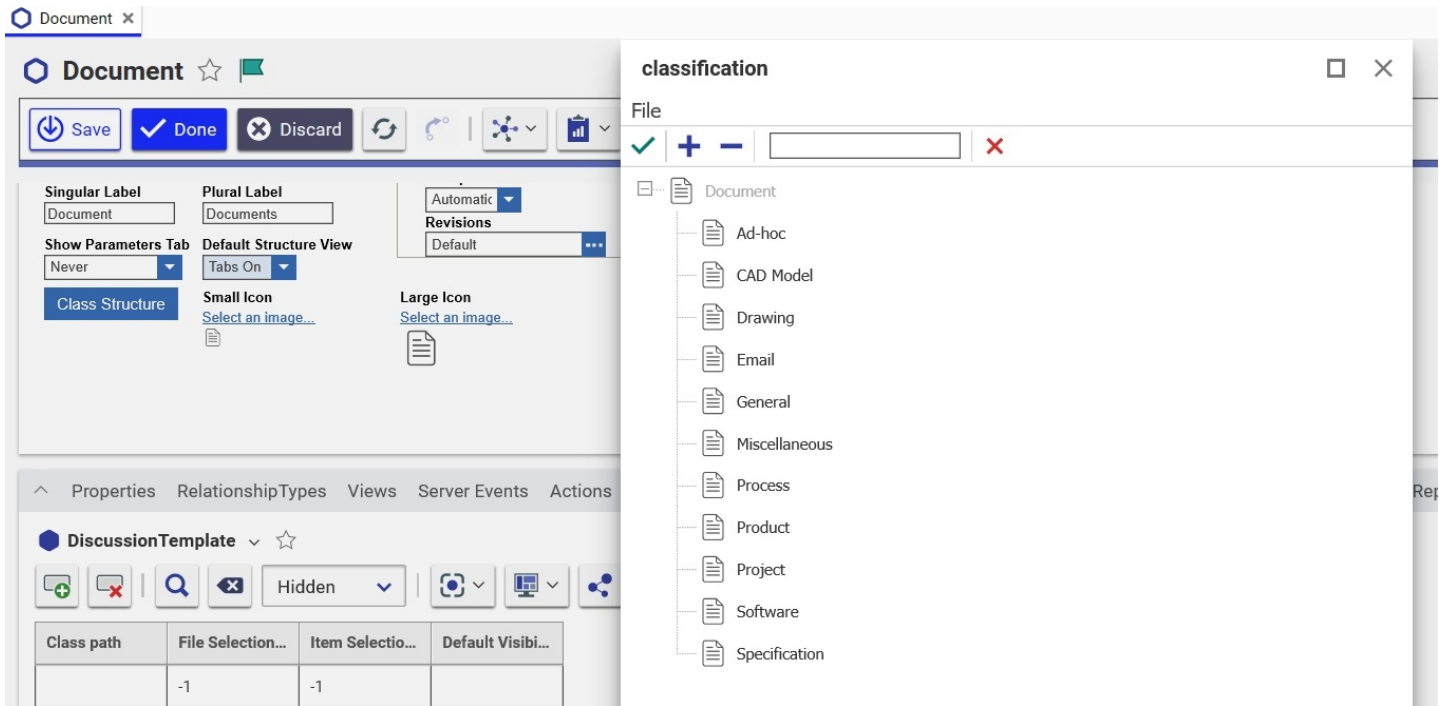
DiscussionTemplate ☆

Hidden

Class path	File Selection...	Item Selectio...	Default Visibl...
	-1	-1	
	-1	-1	

6. Click the **Class Path** box and then click the **ellipses** to access the **classification** dialog box.





7. Highlight the appropriate class path and click Checkmark to select and add it to the new DiscussionTemplate.



8. Right-click the **DiscussionTemplate** and select **Secure Social --> Open** from the context menu.

Document ☆



Singular Label

Document

Plural Label

Documents

Show Parameters Tab

Never

Default Structure View

Tabs On

Class Structure

Small Icon

Select an image...



Automatic

Revisions

Default

Default

25

Max Re

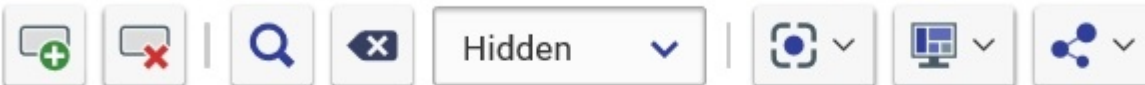
Large Icon

Select an image...



Properties RelationshipTypes Views Server Events Actions Life Cycles

DiscussionTemplate ☆



Class path	File Selection...	Item Selectio...	Default Visibi...
	-1	-1	
	-1		

- Open
- Replace
- Remove
- Actions >



This opens the item tear-off window for the **DiscussionTemplate**.



DiscussionTemplate

Class Path

File Selection Depth

-1

Item Selection Depth

-1

Default Visibility Identity

Message Visibility Supported



Feed Template DiscussionTemplateView

FeedTemplate ☆



Feed Type	History Events	Reference [...]	Polysource ty...
Board		this	

9. Click Edit to modify the properties provided in the DiscussionTemplate item tear-off window as required. Refer to Table 3 for the properties of the DiscussionTemplate along with its description.

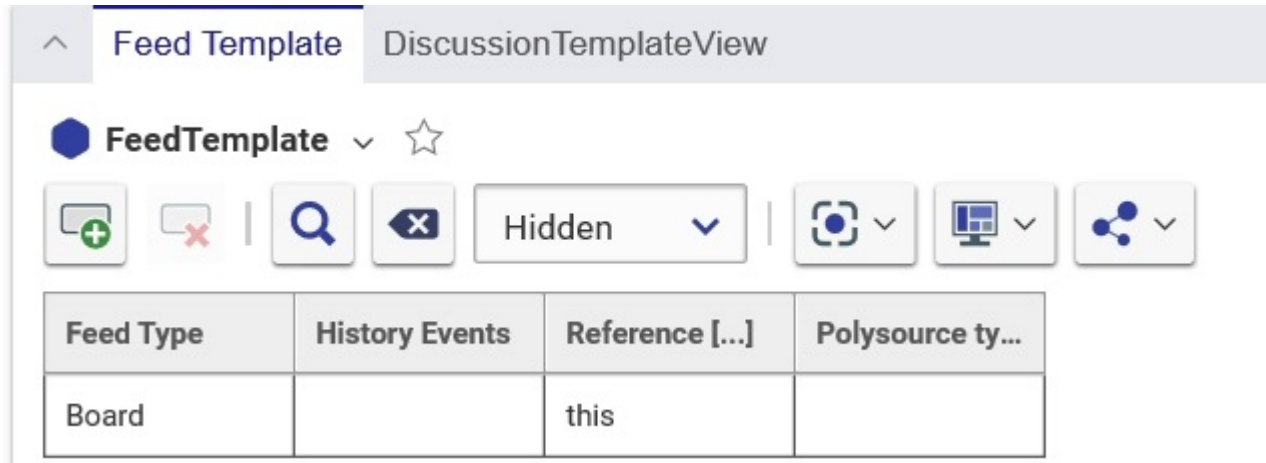
Discussion Template properties

Property	Description
Class Path	(string: 512) Classification for which the DiscussionTemplate would serve as the default template (is_default = true).It is a single template for a particular classification.
File Selection Depth	(int; default: -1) This property defines the depth of the recursion in case of recursive message aggregation.The value “-1” means – no restriction.
Item Selection Depth	(int; default: -1) This property defines from how many levels of recursion to collect files for viewing in the UI in case of recursive message aggregation.The value “-1” means – no restriction.
Default Visibility Identity	(item: Identity) Identity to be used as the default shown in the Share with selector.A blank value means World . See section ItemType Configuration Options for more details.
Message Visibility Supported	(boolean) if ON, the Share with selector is exposed in the Discussion Panel of any items of the given ItemType. If OFF, the selector is not exposed, and all messages are set to visibility = World . See section ItemType Configuration Options for more details.
Feed Template Tab	The Feed Template tab defines Feeds and FileSelectors that are used for aggregating Secure Messages and History records for items of this type. For more information about the Feed Template, refer to FeedTemplate.
DiscussionTemplateView Tab	The DiscussionTemplateView Tab defines options to change the Secure Message template style. For more information about the DiscussionTemplateView , refer to DiscussionTemplateView.

FeedTemplate

A **Feed** is a function that returns a set of Secure Messages or History records associated with a set of items. Each **Feed** Item essentially represents a function.





A single **FeedTemplate** with the following default properties already appears in the Relationship grid:

- **Feed Type:** Board
- **History Events:** null
- **Reference:** this
- **Polysource type name:** null

Use the following procedure to make changes to the **FeedTemplate**:

1. Click the plus button in the Relationship Toolbar to add a new FeedTemplate in the relationship grid.



2. Click the down arrow in the Feed Type column and select the appropriate Feed Type from the dropdown list.
3. Enter the appropriate Reference type in the Reference field.
4. Right-click the **FeedTemplate** in the Relationship grid and select **FeedTemplate --> Open** from the context menu. This opens the **FeedTemplate** Item tear-off window.

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46A8DB10D0D648578A13E6E80599ABB8

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Edit

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FeedTemplate

Feed Type

Board

History Events

Reference

this

Polysource Type Name

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FileSelectorTemplate

FileSelectorTemplate

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Filter [...]

Reference [...]

Tooltip Templ...

5. Click Edit to modify the properties provided in the FeedTemplate as required. Refer to this table for the properties of the FeedTemplate along with its description.



FeedTemplate Properties

Property	Description
	There are two types of Feed:
Feed Type	• Board: if this Feed Type is selected; it means that the Secure Messages (and History records) will be aggregated from Boards of items that are referred by reference property. • Discussion: if this Feed Type is selected, it means that for each item referenced by reference property, Aras Innovator executes all Feeds for the Item's DiscussionTemplate. It allows performing recursive aggregation of Secure Messages and History records from a hierarchical structure of items.
History Events	(string:512) This property is used to aggregate History actions on an item together with the Secure messages. The syntax of History Events is (" ") separated by a list of Configurable History Events. For example, "Add Update Promote" If the property value is "*" (asterisk wildcard) then all history records are aggregated. If the property value is blank, then no history records are aggregated. The property cannot be set for Feeds of Type Discussion.
Reference	(text) This property is used to aggregate secure messages depending on the Reference property of an Item. The syntax of the reference is: reference = this property relationshipPath(property) AML property = Name of the property of type Item. relationshipPath - relationshipName relationshipName/relationshipPath relationshipName - Name of a Relationship Type AML = {valid AML with single top level Item that has action="get {custom method}"} Following are examples of few valid references: • this • p1 • R1(p1)R1/R2/R3/R4(p1) • <Item type="CAD" id="..." action="get" />
Polysource type name	This defines from what specific polysource type the Feed must aggregate Secure Messages. This property is set only when the reference of the Feed refers to a polyitem (For example, a Feed on the DiscussionTemplate for an



Defining a polysource is essential in case the Feed has at least one FileSelector, as a different polysource of the same Polymorphic itemtype can have different properties of type item with the data source file in their structure.

Selecting this tab displays a FileSelectorTemplate.

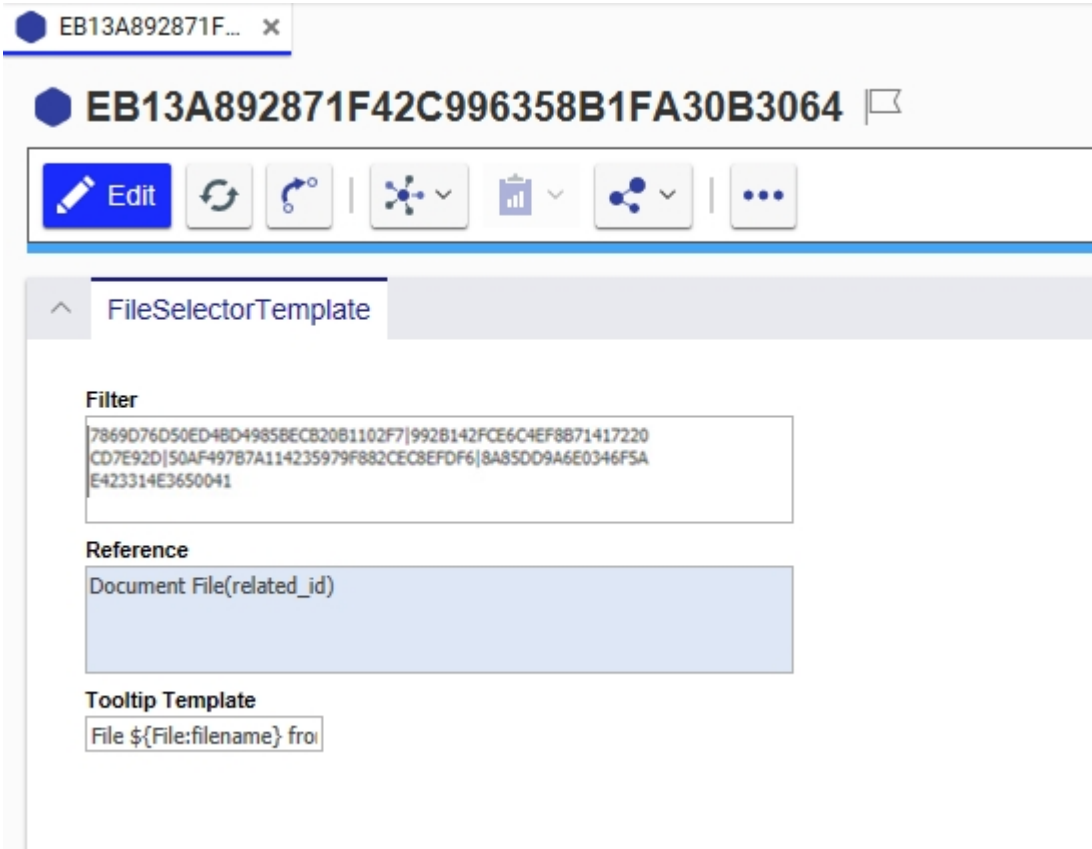
VC has the capability to associate one or more FileTypes with an item to allow an end user to view files using the appropriate file viewer.

FileSelectorTemplate

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Filter [...]	Reference [...]	Tooltip Template
7869D76D50...	Document Fil...	File \${File:filename} from \${ItemType:label} \${Item:keyed_name}

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



Use the following procedure to make changes to the **FileSelectorTemplate**:

1. Click Edit in the FeedTemplate page.
2. Click the plus button in the FileSelectorTemplate Relationship Toolbar to add a new FileSelectorTemplate in the relationship grid.



3. Right-click the **FileSelectorTemplate** in the Relationship grid and select **FileSelectorTemplate** --> **Open** in the context menu.
This opens the **FileSelectorTemplate** Item tear-off window.
4. Modify the properties of the **FileSelectorTemplate** as required. Refer to this table for the properties of the **FileSelectorTemplate** along with its description.

FileSelectorTemplate properties

Property	Description
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(text) This allows selecting required files based on their FileType(s) and filter out files of undesired types.
 It is indicated by “|” separated by a list of FileType Ids.
 Filter If the property is not set, then Files of any types from which there is appropriate Viewer built-in can be selected.
 Lists of FileTypes already assigned to standard Innovator ItemTypes are shown in Appendix A.
 (text) This property is used to select the files selected by appropriate *FeedTemplate*.
 The required files are selected from its own item files that belong to its relationships.
 The syntax of the reference is:

- reference = property | relationshipPath(property)
- property = Name of property of type item
- relationshipPath = relationshipName | relationshipName/relationshipPath
- Reference • relationshipName = Name of a Relationship Type

Following are few examples of valid References:

- p1
- R1(p1)
- R1/R2/R3/R4(p1)

(string:128) It is a template for the tooltip. This tooltip is displayed when the user points the mouse over the appropriate file aggregated on sidebar.
 Tooltip The tooltip template consists of a parameterized syntax with attribute or property name in it.
 Template For instance:
 File \${File:filename} from \${ItemType:label} \${Item:keyed_name} – This template is used to display the keyed name of the "markup" holder item.

DiscussionTemplateView

The **DiscussionTemplateView** tab defines the secure message template styles and tooltip templates for the secure messages.



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Feed Template
DiscussionTemplateView

SSVCPresentationConfiguration
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	Discussion panel beha...	Form tooltip t...	SM template ...	Name	Client
	Discussion Panel Off	Form of \${lte...	F1E9620C1A...	6A64D55E2B...	JavaScript

One **DiscussionTemplateView** with default properties is added to the Relationship grid:

- Discussion panel behavior
- Form tooltip template
- SM template
- Name
- Client (“View Client” list)

To make configurations to the **DiscussionTemplateView**, do the following:

1. Click the plus button in the Relationship Toolbar to add a new DiscussionTemplateView in the relationship grid.



2. Right-click on the **DiscussionTemplateView** in the Relationship grid and select **View SSVCPresentationConfiguration** from the context menu.
3. This opens the **SSVCPresentationConfiguration** Item tear-off window.



The screenshot shows a web application interface for configuring SSSVC1. At the top, there's a tab labeled 'SSVC1' and a header with the SSSVC1 logo and a flag icon. Below the header is a toolbar with icons for Edit, Refresh, Undo, a network diagram, a bar chart, a share icon, and a menu. The main content area is titled 'SSVCPresentationConfiguration'. It contains several configuration sections: 'Discussion Panel Behavior' with a dropdown menu set to 'Discussion Panel On'; 'Form Tooltip Template' with a text input field containing 'Form of \${ItemType:lab}'; 'SM template' with a text input field containing a long alphanumeric string 'D4D8BD6555CB4CD6888F2987F7F72DBA'; and 'Name' with a text input field containing 'SSVC1'.

4. Modify the properties provided in the **SSVCPresentationConfiguration** as required.
Refer to this table for the properties of the **SSVCPresentationConfiguration** along with its description.

SSVCPresentationConfiguration properties

Property	Description
Discussion Panel Behavior	This indicates the default behavior of the discussion panel. This indicates whether the Discussion Panel is automatically displayed or not when the user opens the tear-off window (string:128) It is a template for the tooltip of the Item's Form. The tooltip template consists of a parameterized syntax with the attribute or property name in it. For instance:
Form Tooltip Template	• <i>"\${ItemType:label} \${Item:keyed_name}"</i> where <i>keyed_name</i> is property. This is the default value specified. • <i>"Form of \${@id}"</i> where <i>id</i> is an attribute.

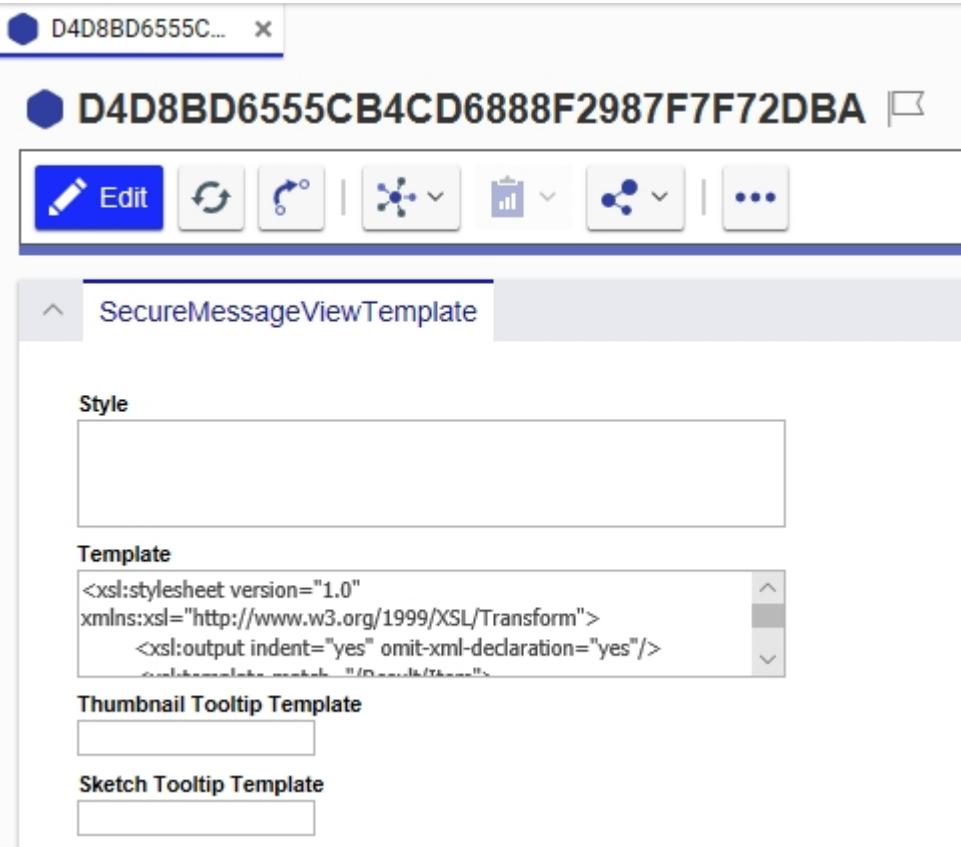


SM Template

This gives a reference to the Secure Message Template used to display Secure Messages in the Discussion Panel. For more information, refer to SecureMessageViewTemplate.

SecureMessageViewTemplate

This template defines the style and template used to display the Secure Messages in the discussion panel.



Modify the properties provided in the **SecureMessageViewTemplate** as required.
Refer to this table for the properties of the **SecureMessageViewTemplate** along with its description.

SecureMessageViewTemplate properties

Property	Description
Style	(text) This indicates the specific styling of the client. For example, CSS or XAML.
Template	(text) This is a template that is responsible for creating Secure Messages “mark-out”. For example, JS or XAML.



(ml_string:128) This is a template for the thumbnail tooltip shown in the secure message. The tooltip template consists of a parameterized syntax with the following attribute/parameters in it:

Thumbnail Tooltip Template

- "markup holder" item
- file from which thumbnail was made
- the *SecureMessageMarkup* itself
- data from the *SecureMessageMarkup.markup_data*

For instance:

- File `${File:filename} ${SecureMessageMarkup:markup_data(//page)}` from `${Item:@type} ${Item:keyed_name}`

Important

Because of difference between Windows and Linux file systems it is required to use OS-specific path separator in paths. Remember that Linux file system is case sensitive so file names `"/path/to/file.xml"` and `"/path/to/File.xml"` are different. For more information about cross-platform development please see section 2.3 Cross-platform development in Aras Innovator 40 - Programmer's Guide document.

Individual DiscussionDefinition

An administrator can configure the **DiscussionDefinition** of an individual item that is based on the **DiscussionTemplate**. This is used when a user (administrator) explicitly expressed a desire to change how the Secure Messages are aggregated for that item. In case the user wants to change at least one of *Feeds* that is associated with the **DiscussionTemplate** for this item. Thus, two items of the same *ItemType* can have discussions that are differently defined.

To change the settings in the individual item using **DiscussionDefinition**, do the following:

1. Open an instance of an item that has been enabled for Secure Social.
2. Click on **Actions** from the Item toolbar and select **Change Discussion Definition**.



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Edit

Part

Part Number

Coupe

Revision

A

State

Preliminary

Name

Coupe

Type

Assembly

Unit

EA

Make / Buy

Make

Cost

Long Description

☐ Changes Pending

Create New Part

Properties

Permissions >

Delete >

PE: rollup all parts in DB

Manual Release

Create New Revision

Add Item(s) To Change...

Change Discussion Definition

Add Item to Bookmarks...

xClass

BOM

BOM Structure

Alternates

AML

Documents

CAD Documents

Goals

Changes

MyBOM

Parts

☆

Hidden

	Seq... ↑ 1	Part Number ↑ 2	Revi...	Name	Type	Quantity	State	Unit
	1	Automatic Gearbox	A	Automatic Gearbox	Component	1	Preliminary	EA
	2	Hybrid Engine	A	Hybrid Engine	Component	1	Preliminary	EA

This opens the **DiscussionDefinition** item tear-off window.



7A996CDF2612... x

7A996CDF26124569B64EF5B0486B3085 

 Save
  Done
  Discard
 





DiscussionDefinition

File Selection Depth
 Item Selection Depth

Default Visibility Identity

Feed DiscussionDefinitionView

Feeds 





 Hidden 




Feed Type	History Events	Reference [...]	Polysource Ty...
Board		this	
Discussion		Part CAD(related...	
Discussion		Part Document(r...	
Discussion		Part BOM(related...	

3. Modify the properties of the **Feed** tab to have multiple feeds used to aggregate secure messages in the discussion panel. For more information about the configurations that can be made in the **Feed** tab, refer to [FeedTemplate](#) .
4. Modify the properties of the **DiscussionDefinitionView** tab to change the style, template and behavior of the Discussion Panel. For more information about the configurations that can be made in the **DiscussionDefinitionView**tab, refer to [DiscussionTemplateView](#) .
5. Click Save and Done to close the window.