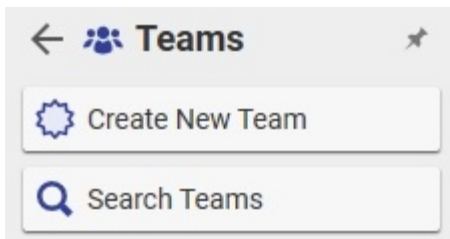


Appendix

Creating Teams

The following procedure is an example of creating a team to associate with an ItemType. For this example, we associate a Team to a Project.

1. From the Navigation pane, select **Administration>Teams**. The following menu appears:



2. Click **Create New Team**. The following window appears:

Team 1 x

Team 1

 Save  Done  Delete

Team

Name

Description

Team Members

 Identities 

  |   Hidden  |   

	Name	Role [...]
---	------	------------

3. Enter the Team name and a brief description in the relevant fields.
4. Click the Select Items icon to add team members. The **Identity Search dialog** appears:

Search dialog - Identity

×

Q

✕

⊘

Simple

▼

✓

✕

	Name	Description	Is Alias	Classification
▼				

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5. Click the **Search** icon to see a list of Identities. In this example, select Administrators and click the green arrow.

6. Click **Done** to save and unclaim the item.

Creating Projects

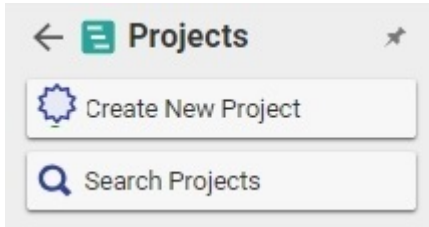
The following procedure is an example of creating projects to associate with the teams created in the previous section:

1. In the Navigation pane, select **Portfolio>Projects**. The following menu appears:

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The Aras logo, which is a stylized red 'A' composed of several overlapping lines.

3



2. Click **Create New Project** to create a project to associate with one of the teams you created in the previous section. The Add Project Plan dialog box appears:

A screenshot of a dialog box titled 'Add Project Plan' with a close button (X) in the top right corner. On the left side, there is a green checkmark icon, the word 'Project', a green hamburger menu icon, and a 'Name:' label. The main area contains several fields: 'Name:' with a text input box, 'Use Template:' with radio buttons for 'Yes' and 'No' (where 'No' is selected), 'Project Template:' with a dropdown menu, 'Target Start:' with a date picker, 'Target Finish:' with a date picker, and 'Scheduling Type:' with a dropdown menu showing 'Forward'.

3. Enter the project name in the **Name** field.
4. Click **Yes** if you want to use a project template. Select the template from the Project Template dropdown. If there are no existing templates, the Yes button and the Project Template dropdown are grayed out. Project1
5. Click the calendar icon in the **Target Start** field to select the start date for the project. The **Target Finish** field automatically displays the next day. Click on the calendar icon to change the finish date.
6. Specify the scheduling type by selecting either **Forward** or **Backward** from the **Scheduling Type** dropdown.
7. Click the green arrow to create the project. The following screenshot shows an example of a project:



1324 1320 Proj... x

1324 1320 Project

Save Done Delete

Project

Project Number: 1324 Project Manager: Innovator Admin ...

Name: 1320 Project From Template

Status :

Target Start: 5/10/2019 Target Finish: 5/13/2019 Scheduling Type: Forward Scheduling Mode: Interactively Only

Scheduled Start: Scheduled Finish: Project Update Mode: Interactively Only

Description:

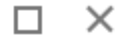
Project Plan Team Deliverables Parts

View Saved searches: Actions + -

N	Project Tree	Predec...	Sta...	Leader [...]	Lead Role	Plan Start	Plan Fini...	Dur...	Ho...	Attach
1324				...	...					

8. Click the ellipses in the **Project Manager** field. The Search dialog – Identity dialog box appears.

Search dialog - Identity



			Simple Search		25					
	Name	Description	Is Alias	Classification						
▼			0	Team						
	Forum Reader	System Identity - Do Not Edit	☐	Team						
	Team Guest	System Identity – Do Not Edit	☐	Team						
	Team Manager	System Identity – Do Not Edit	☐	Team						
	Team Member	System Identity – Do Not Edit	☐	Team						

Items 1-4. Page 1. OF ...

Aras Innovator

9. Select **Team Manager** and click the green check icon.
10. Enter the project name, Target start/finish and Schedule start/finish dates in the appropriate fields.
11. Select the **Scheduling** and **Project Update** modes from the associated dropdown lists.
12. Select the **Team** tab and select either **Pick Related** or **No Related** from the dropdown menu. If you select **Pick Related**, the Search dialog box appears listing the available team roles.



Search dialog - Identity



	Name	Description	Is Alias	Classification
▼			1	
	Authentication Admin		☒	
	ES Admin	The Enterprise Search administrator.	☒	
	Innovator Admin	The Innovator administrator.	☒	
	Innovator Admin1		☒	
	Super User	The Innovator super user with no restrictions.	☒	
	Vault Admin	The Vault administrator.	☒	

Items 1-6. Page 1. OF ...

Aras Innovator

13. Select the identity to associate with the Project and click the green arrow.

Associating Variables with a Project

1. Select the **Deliverables** tab to associate ItemTypes with the project.
2. Click **Select Items** to select existing ItemTypes. The Deliverable dialog box appears:



Search dialog - Deliverable

□ ×

Deliverable

Q

✕

⊘

Simple

+

✓

✗

	ItemType	Keyed Name
▼	Shape	▼

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3. Click the down arrow in the ItemType column and select an item from the list by clicking the green arrow.
4. To create **ItemTypes** to associate with the project, select **Create Items**. The **Select ItemType dialog** box appears:



Select Item Type



Select the Type of Item that is to be created:

- ☒ Part
- ☐ Shape
- ☐ Test
- ☐ TestPart

OK

Cancel

5. Select the item type and click **OK**. The following screenshot shows a blank Part window:



Part 2

Save

Done

Delete

Part

Part Number

Revision

State

Assigned Creator

Name

Designated User

Type

Unit

Make / Buy

Cost

Effective Date

Long Description

Select an image...

☐ Changes Pending

BOM

BOM Structure

Alternates

AML

Documents

CAD Documents

Goals

Changes

MyBOM

Parts

Hidden

	Seq...	Part Number	Revi...	Name	Type	Quantity	State	Unit
	↑ 1	↑ 2						

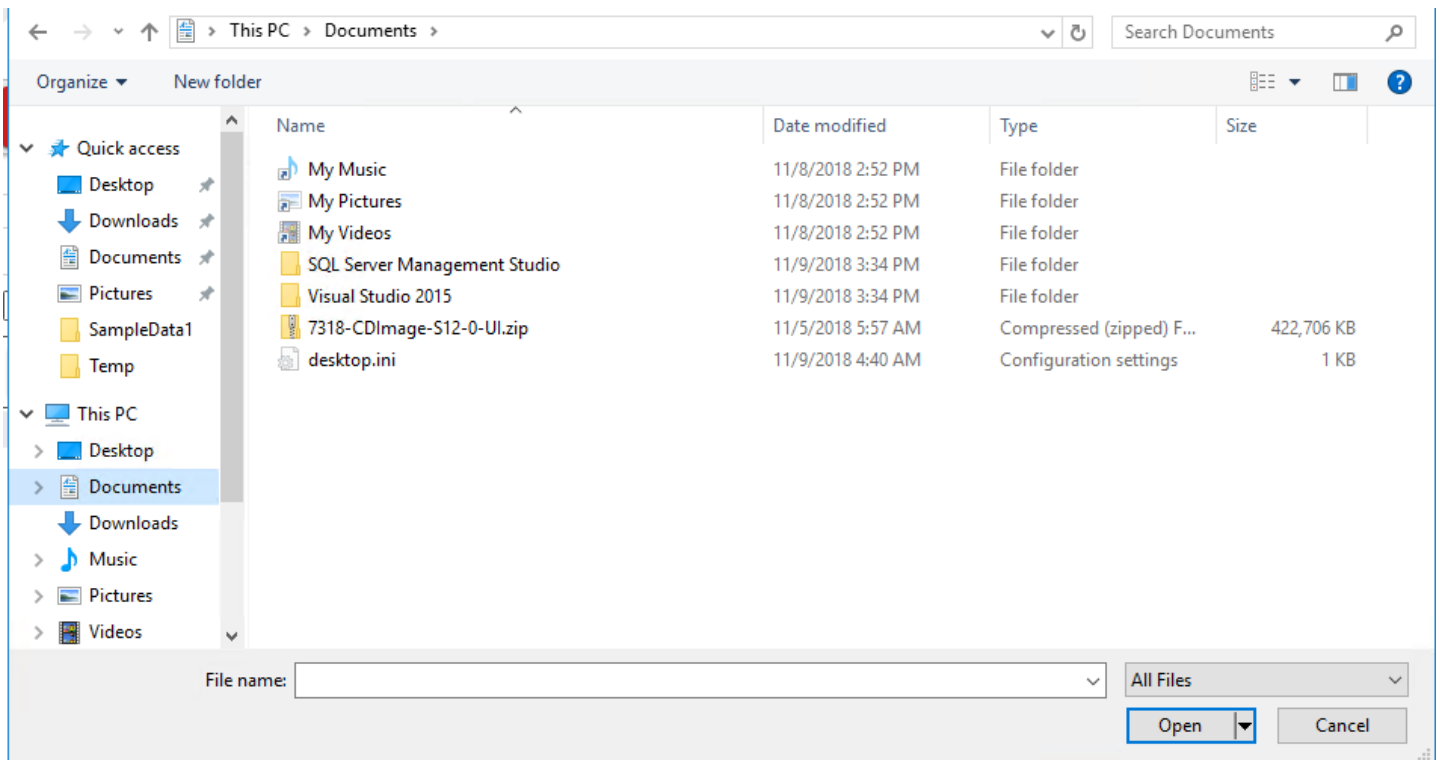
- Enter a number in the **Part Number** field. The **Revision** and **State** fields are automatically populated when you save the part.
- Click the ellipses in the **Assigned Creator** and **Designated User** fields to select roles to assign to the document.
- Click the calendar icon to specify the **Effective Date** for the document.
- Enter a description in the **Description** field.
- Click the **Template** checkbox to use a template for the document.

Attaching Files to a Document



Use the following procedure to attach related files to a project document:

1. Click the Add Documents icon. A window similar to the following appears:



2. Select the appropriate file and double-click on it to attach it to the document.
3. Click **Save**. The document appears on the Project Deliverables tab.
4. Click the **Part** tab and select the **New Relationship** icon to associate a Part with the project. The Search dialog box appears.

Adding Parts to a Project

Use the following procedure to add part information to a project:

1. Select the **Parts** tab to add one or more parts to a project.
2. Select **Pick Related** from the dropdown and click on the **New Relationship** tab to select existing parts. The Part search dialog appears.
3. Click the **Run Search** icon to see a list of available parts:



Select Items

Parts

Simple

Part Number	Re...	Name	Type	State	Cost	Chan...
C-000001	A	Carburetor	Component	Preliminary		☐
car	A	car		Preliminary		☐
P00001	A	Part related to Project	Component	Preliminary		☐
PC-001	A	Computer System	Assembly	Preliminary		☐
RootPart	A	RootPart	Assembly	Preliminary		☐

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5 Results

25

OK

Cancel

- Select the Parts that you want to attach to the project and click the green arrow. They are added to the **Parts** tab.
- Select the Part and click the **Return Selected** icon. Click **Save**. Use this procedure to create a second project.
- Associate the project with Team2.

Custom DRF Events Handling

Previously we discussed how DAC automatically maintains a record of every instance of every Derived Relationship in a table. It does so using an internal event handling mechanism which can also be leveraged and extended for configuration and customization of events in a DAC domain.

As of 12.0 SP5 an Event Handler is available under the DRF that provides *event types* and default methods OOTB. Events fire when item membership in a domain changes – for instance, when a Part item is added or removed from a BOM structure under an active DAC AC Policy. The event runs the associated method, executing business logic before `unidr_Relationships` are committed (persisted).

Important

The **Event Handlers** tab is hidden on the Derived Relationship Family UI by default.

To expose the **Event Handlers** relationship tab:



1. Log in as Admin.
2. Edit the **dr_RelationshipFamily** ItemType.
3. Set 'Default Structure View' to **Tabs On**.

The screenshot shows the configuration page for the **dr_RelationshipFamily** ItemType. The page has a header with the item name and a star icon. Below the header is a toolbar with buttons for Edit, Refresh, Undo, and other actions. The main content area is divided into sections for Name, Singular Label, Plural Label, History Template, Default Structure View, and Versioning. The 'Default Structure View' is set to 'Tabs On'. The 'Versioning' section includes options for Versionable, Discipline, and Revisions.

Name dr_RelationshipFam	History Template Default	Versioning Versionable ☐
Singular Label Derived Relationship	Plural Label Derived Relationship	Discipline Automatic
Show Parameters Tab When Populated	Default Structure View Tabs On	Revisions Default
Class Structure	Small Icon	Large Icon

You will see the tab below when DRF is opened.

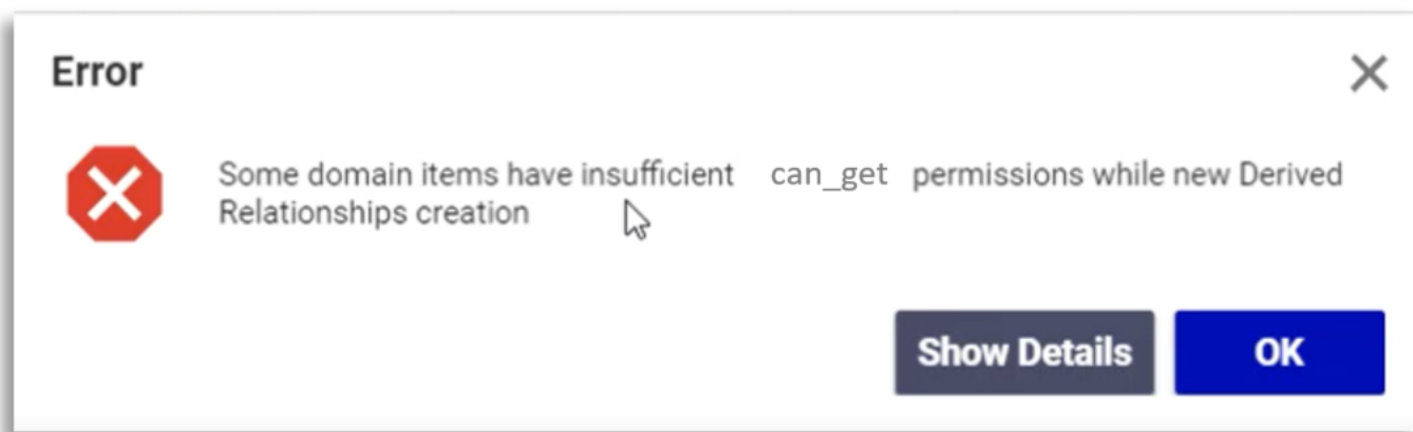
Aras provides 2 OOTB Event Handlers:

- **dr_HandleItemVersion** is a core function and should not be edited or removed.
- **dr_EnsurePropagatedAccess** checks whether adding a new item to the domain would provide permissions for the user that were not granted prior to the event.

The **dr_EnsurePropagatedAccess** Event Handler

To add an item to a Domain,

1. A user must have the **can_get** access right to the item. This handler is configured to enforce **can_get** OOTB; see the **Event Data** column in Figure 54.
2. An administrator can specify additional Access Types in a comma separated list, e.g., **can_get,can_delete**.
3. If the user does not have any of the specified Access Types when adding an item to a Domain, an error is raised and the operation is rolled back.



The **OnBeforePersistRelationships** event will execute any method under the **Event Handler** column in **Execution Order**, with **Event Data** parameters if provided. Therefore, a knowledgeable implementor can provide an alternate method to **dr_EnsurePropagatedAccess** or even remove the Event entirely as business rules require.

Derived Relationships

Event Handlers

Event Handlers

+

-

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✖

Hidden

🔧

🖥

🔗

Execution Or...	Event Type	Event Handler [...]	Event Data [...]
5	OnBeforePersistRelationships	dr_HandleItemVersion	
10	OnBeforePersistRelationships	dr_EnsurePropagatedAccess	<data><access_types>can_get</access_types></data>