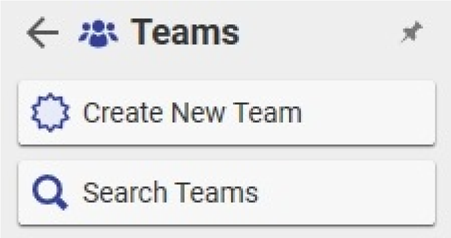
Appendix

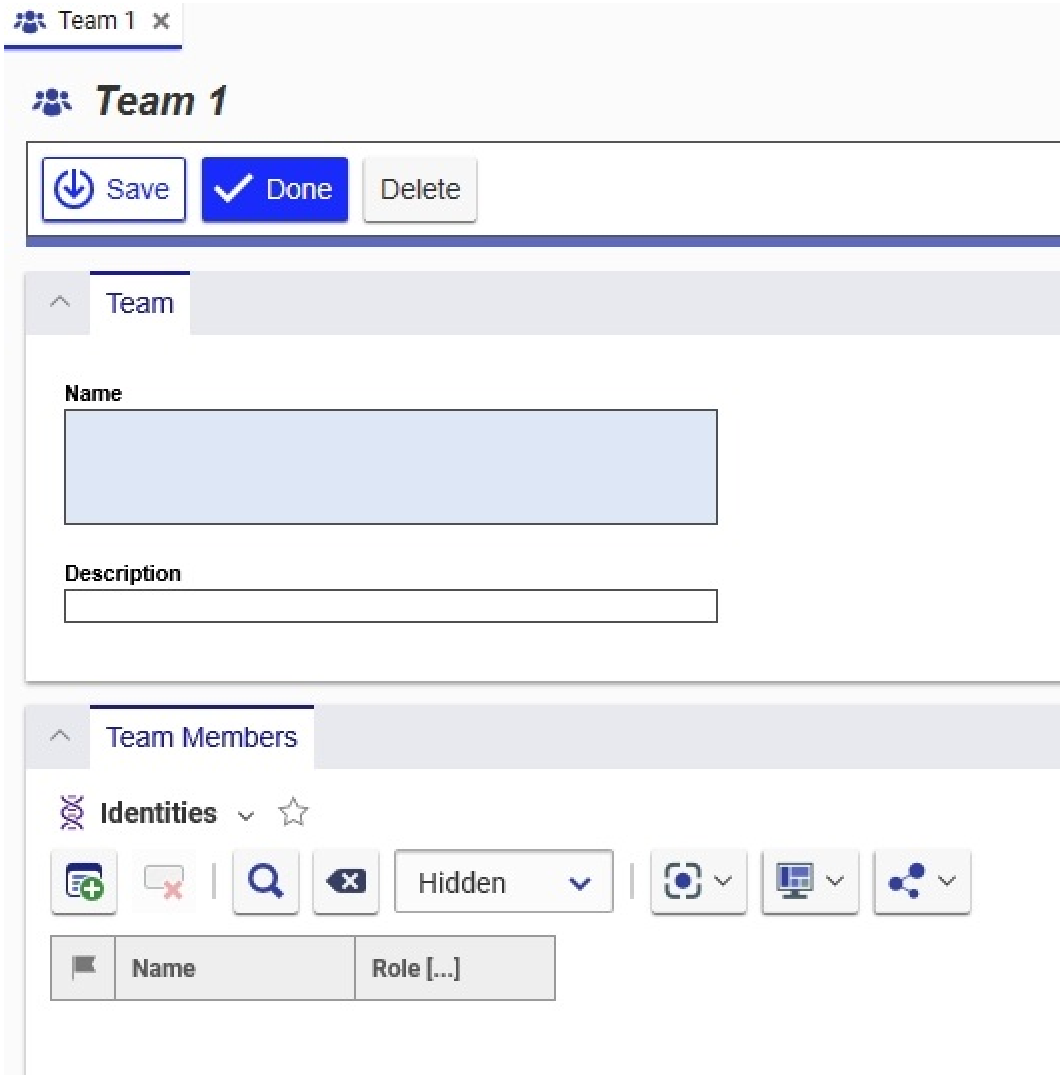
Creating Teams

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:

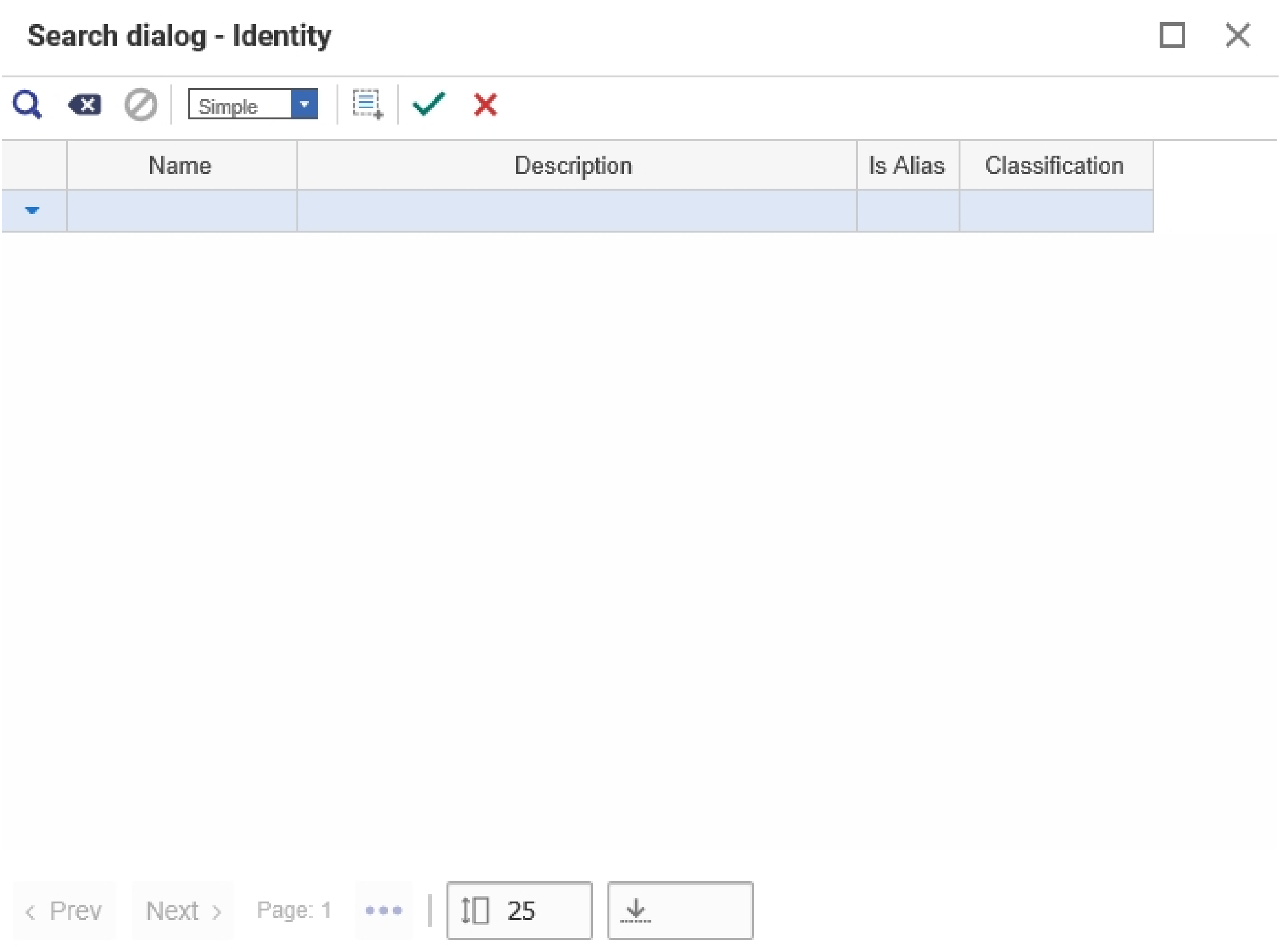


2. Click **Create New Team**. The following window appears:



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:

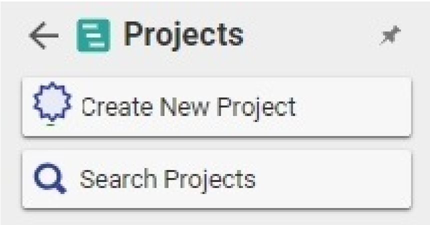


5. Click the **Search** icon to see a list of Identities. In this example, select Administrators and click the green arrow.
6. Click **Done** to save and unclaim the item.

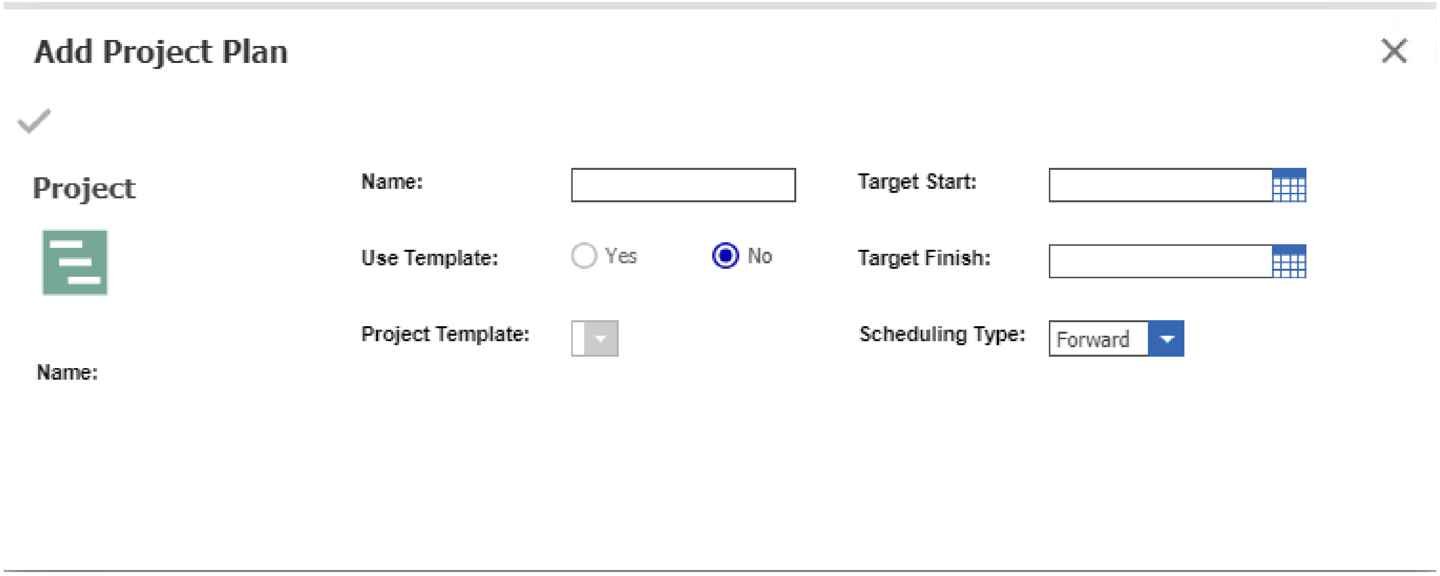
Creating Projects

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

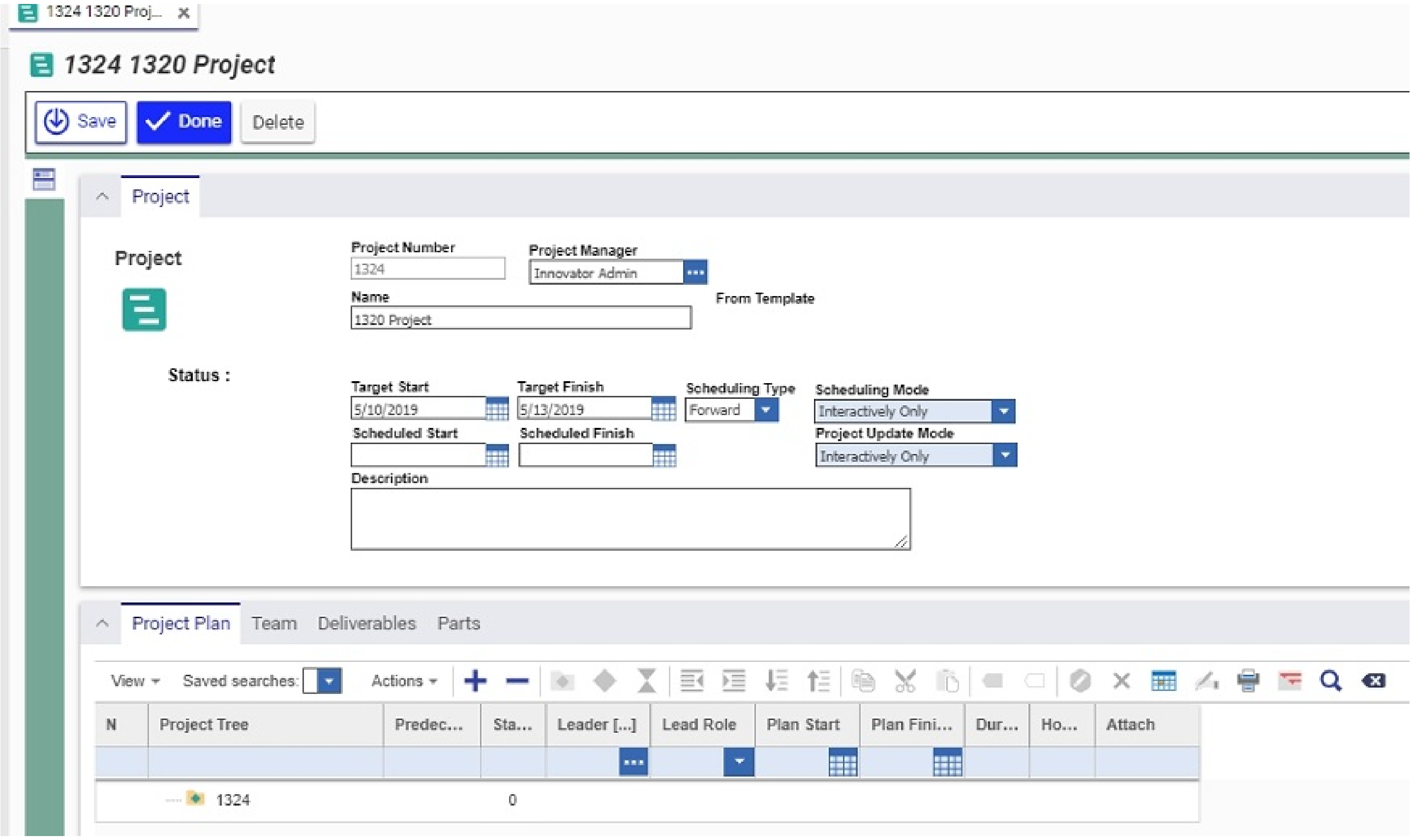
1. In the Navigation pane, select **Portfolio>Projects**. The following menu appears:



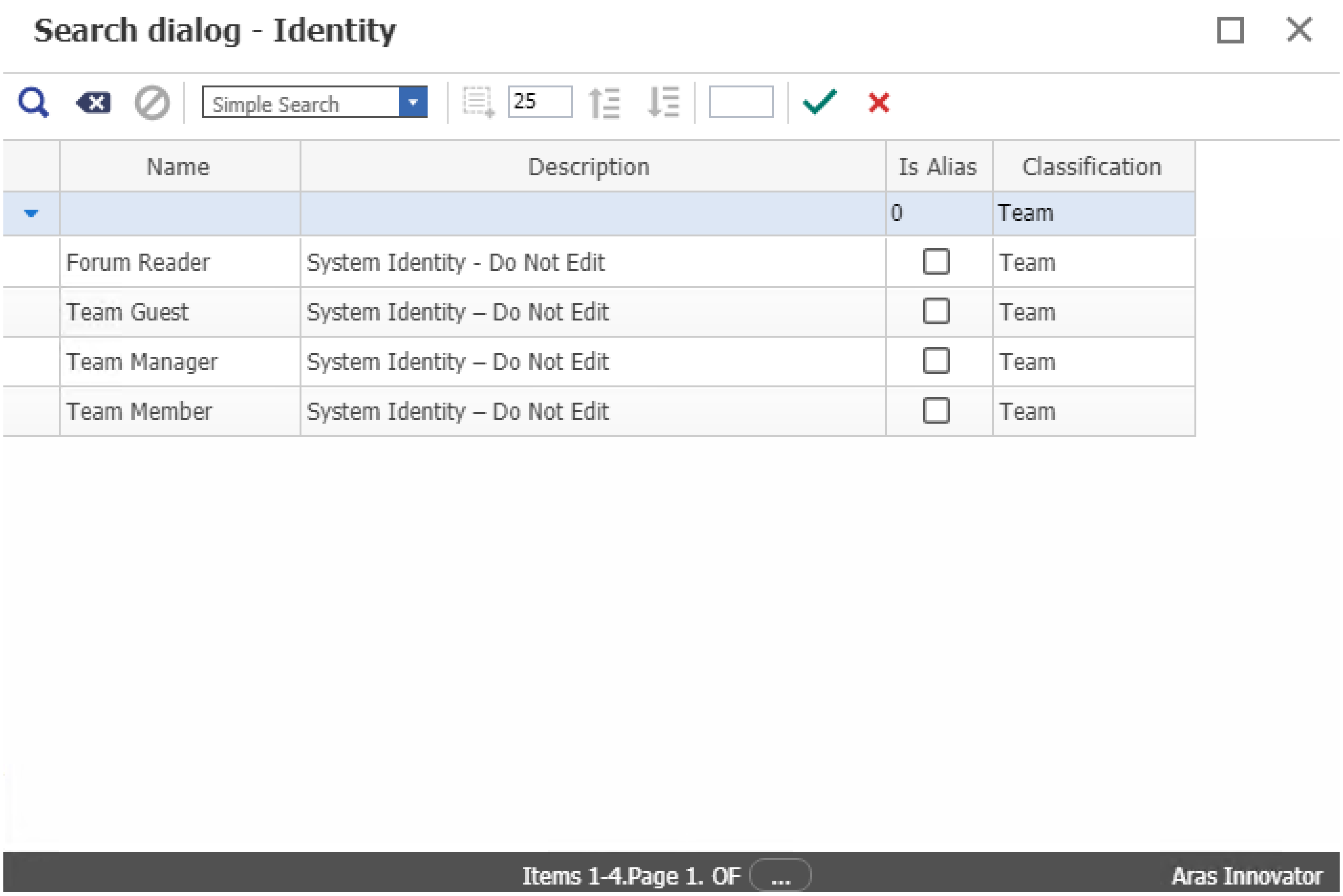
2. Click **Create New Project** to create a project to associate with one of the teams you created in the previous section. The Add Project Plan dialog box appears:



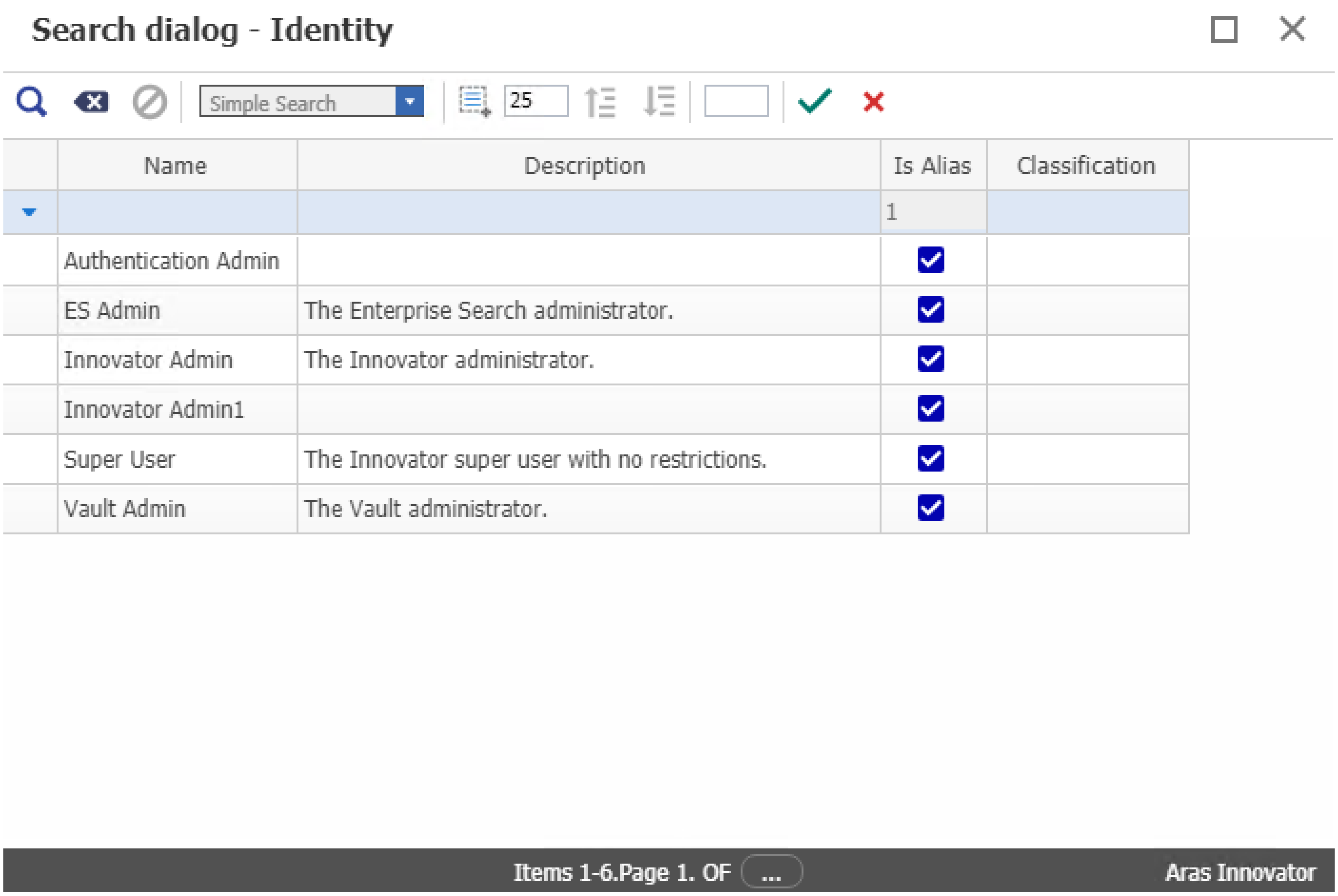
3. Enter the project name in the **Name** field.
4. Click **Yes** if you want to use a project template. Select the template from the Project Template dropdown. If there are no existing templates, the Yes button and the Project Template dropdown are grayed out. Project1
5. Click the calendar icon in 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:



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



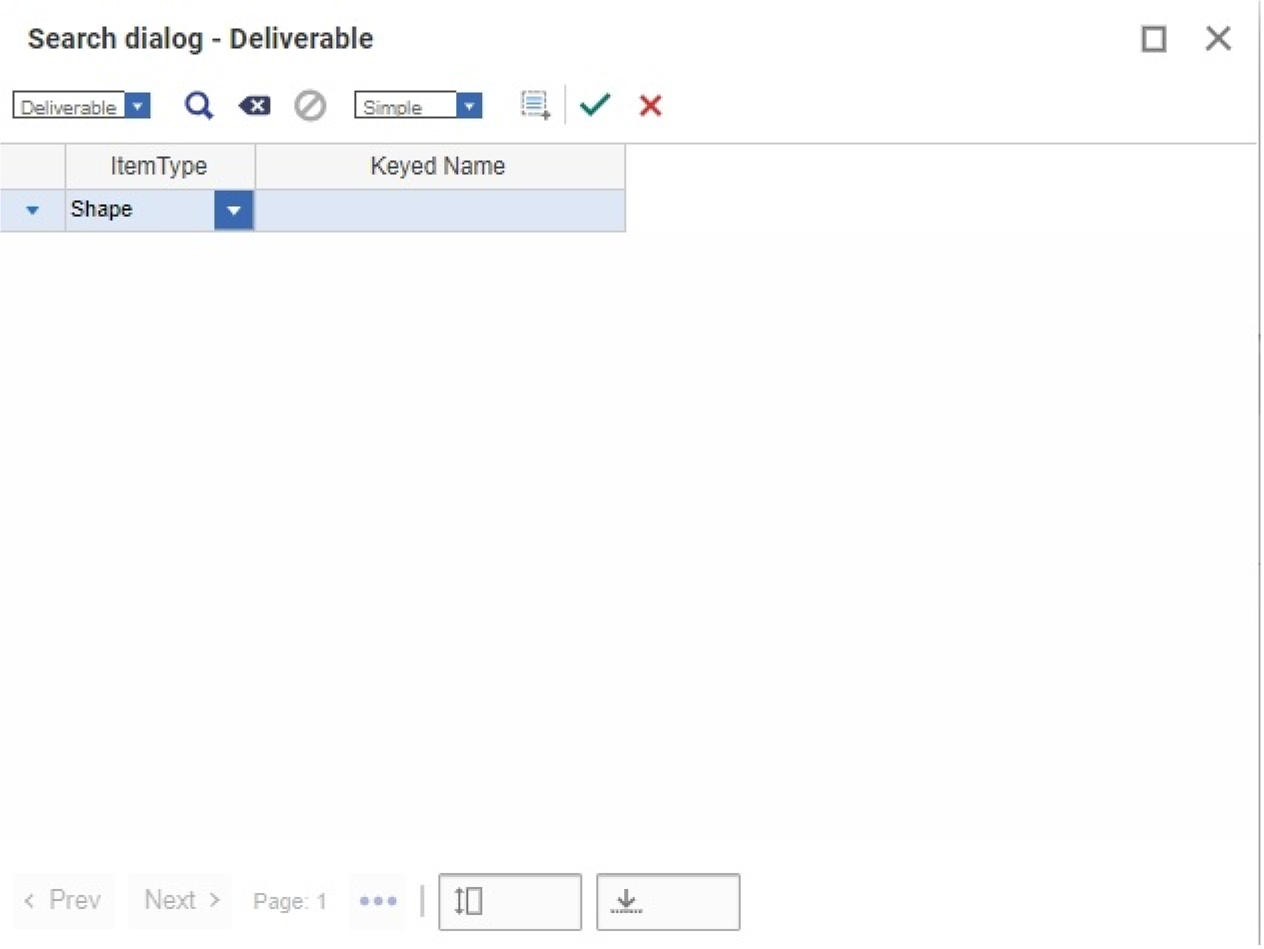
9. Select **Team Manager** and click the green check icon.
10. Enter the project name, Target start/finish and Schedule start/finish dates in the appropriate fields.
11. Select the **Scheduling** and **Project Update** modes from the associated dropdown lists.
12. Select the **Team** tab and select either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



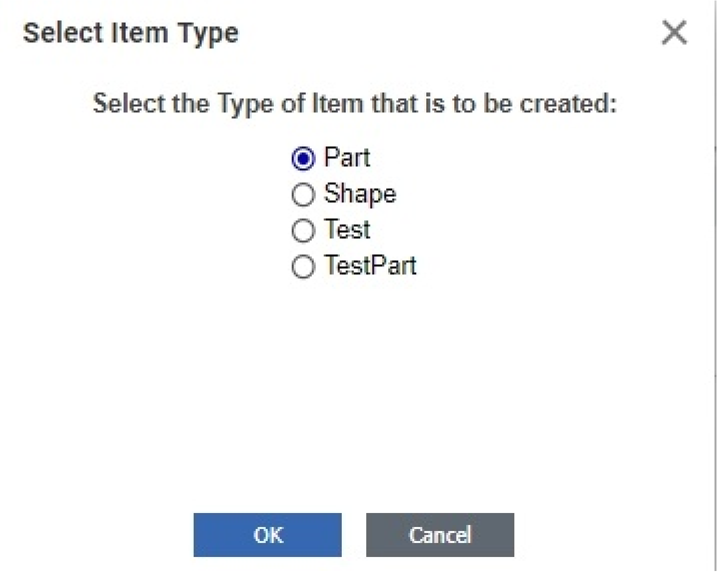
13. Select the identity to associate with the Project and click the green arrow.

Associating Variables with a Project

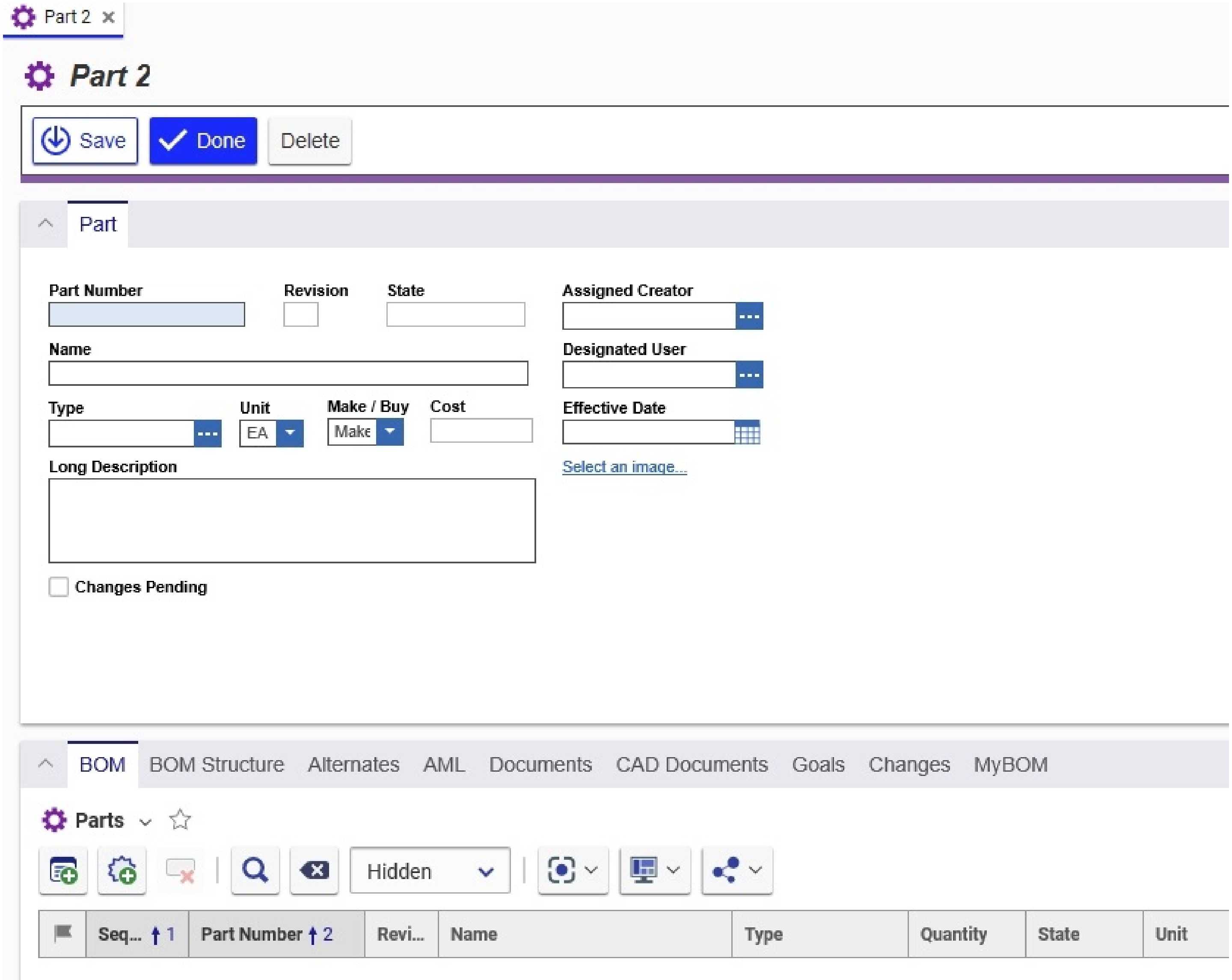
1. Select the **Deliverables** tab to associate ItemTypes with the project.
2. Click **Select Items** to select existing ItemTypes. The Deliverable dialog box appears:



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:



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

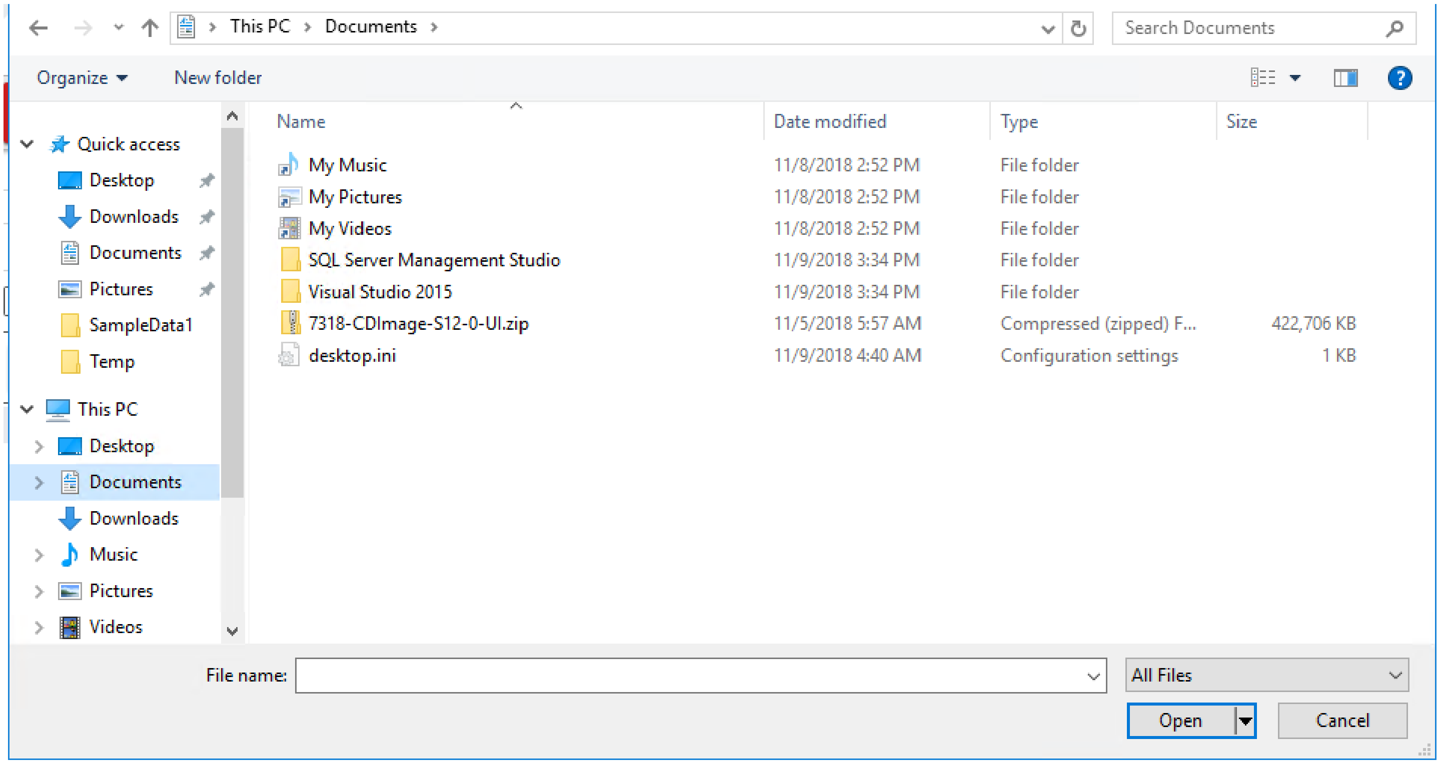


6. Enter a number in the **Part Number** field. The **Revision** and **State** fields are automatically populated when you save the part.
7. Click the ellipses in the **Assigned Creator** and **Designated User** fields to select roles to assign to the document.
8. Click the calendar icon to specify the **Effective Date** for the document.
9. Enter a description in the **Description** field.
10. 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:



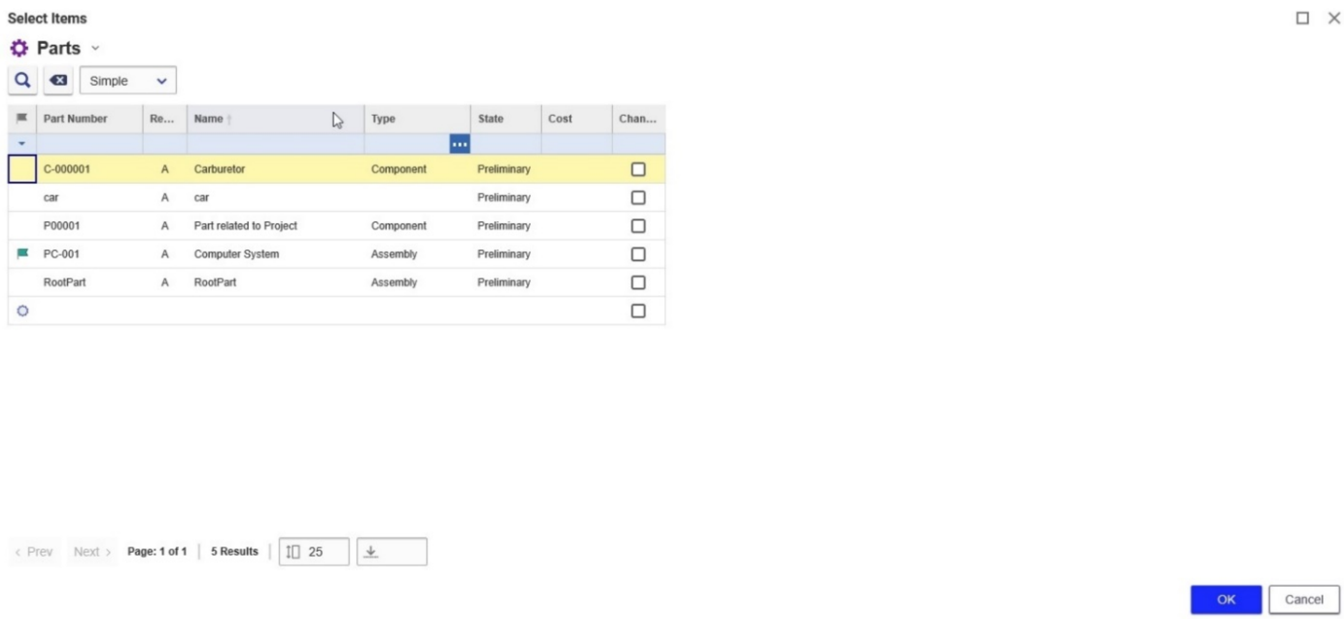
2. Select the appropriate file and double-click on it to attach it to the document.
3. Click **Save**. The document appears on the Project Deliverables tab.
4. Click the **Part** tab and select the **New Relationship** icon to associate a Part with the project. The Search dialog box appears.

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:



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

Custom DRF Events Handling

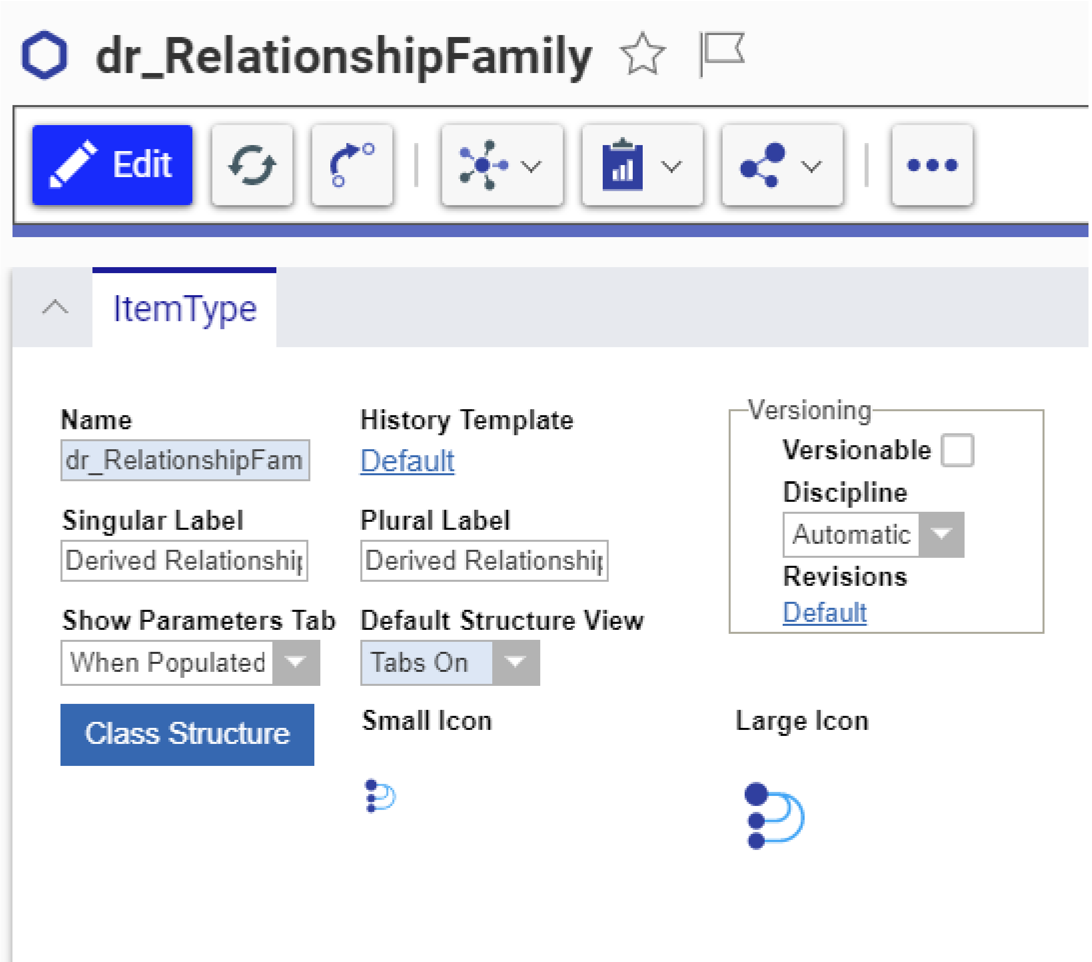
Previously we discussed how DAC automatically maintains a record of every instance of every Derived Relationship in a table. It does so using an internal event handling mechanism which can also be leveraged and extended for configuration and customization of events in a DAC domain.

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**.



You will see the tab below when DRF is opened.

Aras provides 2 OOTB Event Handlers:

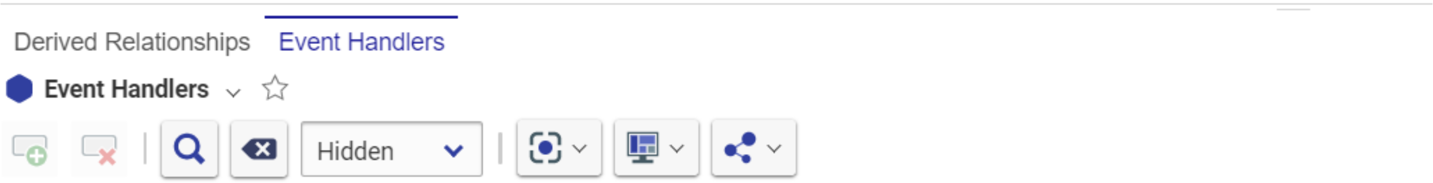
- **dr_HandleItemVersion** is a core function and should not be edited or removed.
- **dr_EnsurePropagatedAccess** checks whether adding a new item to the domain would provide permissions for the user that were not granted prior to the event.

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.



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

