

User Interface (UI) Overview

The Aras Innovator user interface (UI) is dynamic; UI components, such as dialogs, toolbars, and buttons are shown or hidden depending on the context. Additionally, when a UI component is displayed in a lighter color, it indicates that this component is not available in the current context. This section describes essential UI interactions and components to navigate in the Product Engineering application.

Navigation Panel

Clicking the Navigation button null displays the Navigation Panel. This panel displays the Aras Innovator Table of Contents. A User's permissions determine the categories that appear in the Navigation Panel. The Navigation Panel is auto hidden when you click outside the TOC. Click the Pin button null in the Navigation Panel if you wish to pin it to the UI.

The Product Engineering application has several categories on the Navigation panel:

- **Change Management** – Contains Engineering Change Items, such as Problem Reports (PRs), Engineering Change Requests (ECRs) and Engineering Notices (ECNs). This list may vary depending on how an administrator configures the system.
- **Design** – Contains Part and Product items.
- **Documents** – Contains Document and CAD Document items.
- **Sourcing** – Contains Manufacturers, Manufacturer Parts, and Vendor items.

Search Page

Hover or click on an item in the Navigation Panel to access the search page.

Search Toolbar

The **Search** toolbar enables you to search for items and view the search results.



1. Click the **Search** button to run a search.



2. Click the **Clear** button to clear search criteria.
3. **Search Modes** dropdown menu:
 - Use **Simple** search when the columns that appear in the search grid are sufficient for the desired search criteria.
 - Use **Advanced** search when entering complex search criteria where each criterion can use one of these operators: =, ≠, like, not like, null, not null.
 - Use **AML** search to create a complex search query.
 - Use **Hidden** to hide the search criteria from the search grid.
4. Query Type dropdown menu:
 - **Current** returns the current version of items.
 - **Latest** returns the most recent version of items based on a specified date.
 - **Released** returns the most recent version in the released state on a specified date.
 - **Effective** returns the effective version on a specified date.
5. The **Query Date** dialog box enables you to select a date in conjunction with the **Latest**, **Released**, and **Effective** Query Types. By default, it is set to Today.
6. The **Layouts** menu presents a list of layouts to select from. This menu also provides the ability to save a new layout, update a default layout, and delete a layout.
7. The **Refine** menu presents a list of item Properties and Extended Properties to select that appear in the Search Grid.
8. The **Display** menu allows you to select the level of details to display when an item is selected from the search results.
 - Choose **Form** to display the selected item's form at the bottom pane of the search results page.
 - Choose **Properties** to display details in a pane to the left of the search results page.
 - Choose **Hide** to show no details.
9. The **Share** menu presents options to export search results.
10. Click the **New** button to create a new Item.

Search Grid

The Search Grid shows search results for items of one ItemType. Double-click on an item in the search grid to open it for viewing, or right-click it to access the context menu. If you select multiple items, the context menu displays multi-item actions applicable for that ItemType.



Parts

Simple ▾

Current ▾

Today

Default ▾

▾

▾

▾

	Part Number	Revi...	Name	Type	State	Cost	Chan...
▾							
	Child Part A	C	Child Part A	Assembly	Preliminary	30.0000	☐
	Child Part A Alternate	A	Child Part A Alternate	Component	Preliminary		☐
	Child Part A Alternate 2	A	Child Part A Alternate 2	Component	Preliminary		☐
	Child Part A Substitute	A	Child Part A Substitute	Component	Preliminary		☒
	Child Part A Substitute 2	A	Child Part A Substitute 2	Component	Preliminary		☒
	Child Part A.1	A	Child Part A.1	Component	Preliminary	12.0000	☐
	Child Part A.2	A	Child Part A.2	Component	Preliminary	17.0000	☐
	Child Part B	D	Child Part B	Assembly	Preliminary	50.0000	☐
	Child Part B.1	A	Child Part B.1	Component	Preliminary	22.0000	☐
	Child Part B.2	A	Child Part B.2	Assembly	Preliminary	28.0000	☐

In Simple Search mode, you can enter simple search criteria in the blue filter row of the Search Grid to filter the results against these criteria.

All searches are case insensitive. Use * or % as a wildcard search. Use * to search for all non-blank values. Use 0 or 1 to filter on properties with check boxes: 0 corresponds to not checked, 1 corresponds to checked values.

For example, you can type **Parent*** or **Parent%** in the **Name** blue cell of the Parts Search Grid to get all the Parts that have names that start with the word Parent.

Simple ▾

Current ▾

Today

Default ▾

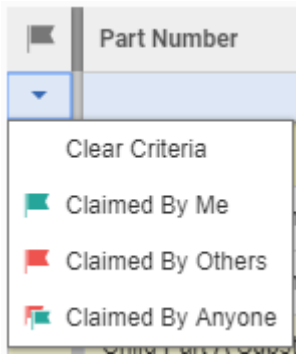
▾

▾

▾

	Part Number	Revi...	Name	Type	State	Cost	Chan...
▾			Parent*				
☐	Parent Part	A	Parent Part	Assembly	Preliminary		☐

The first column shows the claim status of Items. Use this column to search for items claimed by you or someone else. For details, refer to section [Item Claiming](#).



Paging Controls

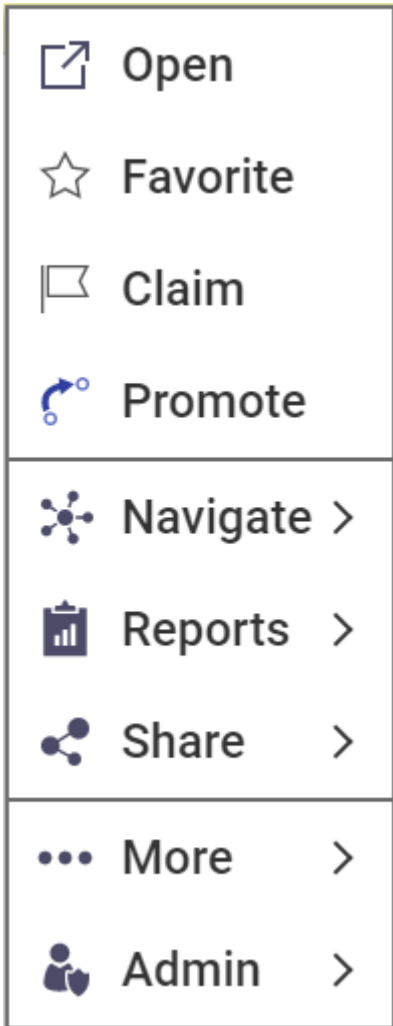
The **Paging Controls** toolbar enables you to move from page to page in the Search grid, specify the total number of pages/results, and specify the maximum number of results that display on a page.



1. Click the **Prev** button to go to the previous page.
2. Click the **Next** button to go to the next page.
3. Displays the **Current page**.
4. Click the **Show Total Pages and Results** button to view the total number of pages and search results.
5. Use the **Results per Page** box to specify the number of results that appear on a page.
6. Enter a number in the **Maximum Results** box to specify the maximum number of results returned from a search.

Context Menu

The context menu displays the available actions for items appearing in the Search grid. Right-click an item in the grid to access the context menu. The context menu is an alternative access point to the functionality provided in the item window toolbar when you open an item. Each context menu contains commands specific to the ItemType and state of the item and is subject to permissions. As such, context menus are dynamic and variable. The commands common to most context menus are explained here.



- **Open** displays an Item in a new tab in view mode.
- **Favorite** allows you to favorite an item.
- **Claim** explicitly locks an item to prevent editing by other users and keeps the item locked/claimed between sessions. For details, refer to section [Item Claiming](#) .
- **Unclaim** releases the claim from the item.
- **Promote** takes the item to its next life cycle state if any is available. For details, refer to section Manual State Promotion in Versioning and Promoting.
- **Navigate** contains exploration options for the selected item.
 - **Structure Browser** is used for exploration and comparison of item's relationships. For details, refer to section [Comparing Items](#).
 - **Where Used** is used for determining where an Item is used by other Items. For details, refer to section [Finding Where an Item is Used](#) .



- **Reports** displays the Reports available for the selected item.
- **Share** displays options for sharing the selected item.
- **More** displays additional actions available for the selected item.
 - **Properties** displays the item's properties in the **Properties** dialog.
 - **Save As** starts the copy process by opening a form page tab to create a new item.
 - **Delete** displays options for deleting the current version or all versions of an item.

Item View

A view of an item appears as a new **Page** tab with:

1. The Page Title bar
2. The Item toolbar
3. The Form accordion
4. The Relationships accordion
5. The Accordion Arrow button, which folds and unfolds an accordion



1  MP0101

2      

3 **Part**

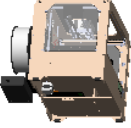
5 **Part Number** MP0101 **Revision** B **State** Preliminary **Assigned Creator** **Extended Classification**

Name Makerbot Replicator **Designated User**

Type Assembly **Unit** EA **Make / Buy** Make **Cost (Calculated)** 4760.7859 **Effective Date**

Long Description
The MakerBot Replicator by MakerBot. Published on March 12, 2012.
www.thingiverse.com/thing:18813

☒ Changes Pending



4 **BOM** BOM Structure Alternates AML Documents CAD Documents Goals Changes

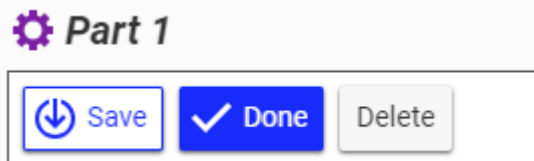
5 **Parts**     Hidden   

Sequence	Part Number	Revision	Name	Type	Quantity	State	Unit	Reference Designator	Changes
5	MP2942	B	Body	Assembly	1	Preliminary	EA		☒
10	MP2954	B	Extruder	Assembly	1	Preliminary	EA		☒

Item Toolbar

The contents of the **Item** toolbar depend on the ItemType, state of the item, and permissions.

When you create a new item, the **Item** toolbar displays the following buttons:



- **Save** enables you to save changes to the Item and continue editing it.
- **Done** enables you to save changes to the Item and unclaim it.
- **Delete** enables you to delete the Item.



When editing a saved/existing item, the **Item** toolbar displays the following buttons:



1. **Save** saves changes to the item and enables you to continue editing it.
2. **Done** saves changes to the item, unclaims it, and quits edit mode.
3. **Discard** reverts all changes to the item, unclaims it, and quits edit mode.
4. **Refresh** updates the data in the View with the latest information.
5. **Promote** takes the item to its next life cycle state if any is available. For details, refer to section Manual State Promotion.
6. **Navigate** displays a menu with options to explore the item's history, usage, and relationships.
7. **Reports** displays a menu with reports available for this ItemType.
8. **Share** displays a menu with export options available for this ItemType.
9. **More** displays a menu with additional capabilities available for this ItemType.

When viewing an item, the **Item** toolbar displays the same buttons, except the **Edit** button, which replaces the **Save**, **Done**, and **Discard** buttons:



Edit claims the item and launches it in edit mode.

Relationships Accordion

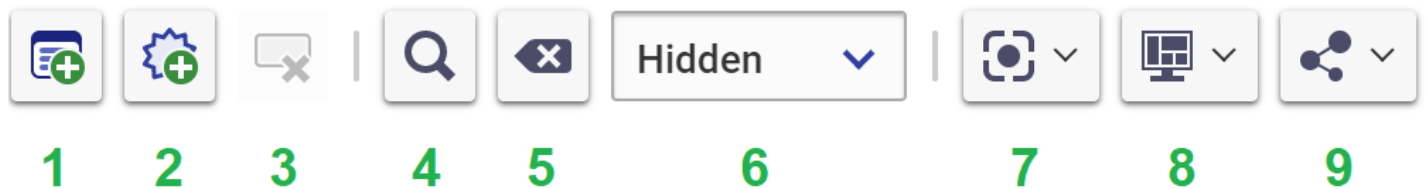
1	^ BOM BOM Structure Alternates AML Documents CAD Documents Goals Changes																																										
2	⚙️ Parts ☆																																										
3	🔍 🔍 🔍 🔍 Hidden 🔍 🔍 🔍																																										
4	<table> <tr> <th></th><th>Seq...</th><th>Part Number</th><th>Revision</th><th>Name</th><th>Type</th><th>Quantity</th><th>State</th><th>Unit</th><th>Reference Designator</th><th>Changes</th></tr> <tr> <td></td><td>1</td><td>MP2942</td><td>A</td><td>Body</td><td>Assembly</td><td>1</td><td>Preliminary</td><td>EA</td><td></td><td>☐</td></tr> <tr> <td></td><td>2</td><td>MP2954</td><td>A</td><td>Extruder</td><td>Assembly</td><td>1</td><td>Preliminary</td><td>EA</td><td></td><td>☐</td></tr> </table>											Seq...	Part Number	Revision	Name	Type	Quantity	State	Unit	Reference Designator	Changes		1	MP2942	A	Body	Assembly	1	Preliminary	EA		☐		2	MP2954	A	Extruder	Assembly	1	Preliminary	EA		☐
	Seq...	Part Number	Revision	Name	Type	Quantity	State	Unit	Reference Designator	Changes																																	
	1	MP2942	A	Body	Assembly	1	Preliminary	EA		☐																																	
	2	MP2954	A	Extruder	Assembly	1	Preliminary	EA		☐																																	

The **Relationships** accordion hosts:

1. The **Relationships** accordion tabs
2. The **Relationships** title bars
3. The **Relationships** toolbars
4. The **Relationships** content area

Relationships Toolbar

Each **Relationships** accordion tab has a **Relationships** toolbar to provide functionality specific to its relationship type and **Relationships** content area. The **Relationships** toolbars are dynamic and variable. The contents of the **Relationships** toolbar depend on the relationship type, state of the item, and permissions. The buttons common to most **Relationships** toolbars are explained here.



1. The **AddItems** button launches a **Search dialog** to search for and add existing items to the **Relationships** grid.
2. The **NewItem** button creates a new row in the **Relationships** grid. When the item is saved, the related item is created.
3. The **Delete Row** button removes the selected row (relationship) from the table without deleting the related item.
4. The **RunSearch** button runs the search criteria on the related items.
5. The **ClearSearch Criteria** button clears the search criteria on the related items.
6. The **Search Modes** menu allows selecting the mode for the search criteria. For details on the search modes, refer to section Search Toolbar.
7. The **Refine** menu presents a list of item Properties and Extended Properties to select which will be displayed in the **Relationships** grid.
8. The **Display** menu provides:
 1. **Redline View** to compare each item to its previous Released revision
 2. **Save Layout** to allow you to save the layout of the relationship grid
9. The **Share** menu displays options to export search results available for an item.

Relationships Content Area

A **Relationships** content area can display a **Relationships grid** or a **Relationships structure**, such as a multiple level Tree Grid View.

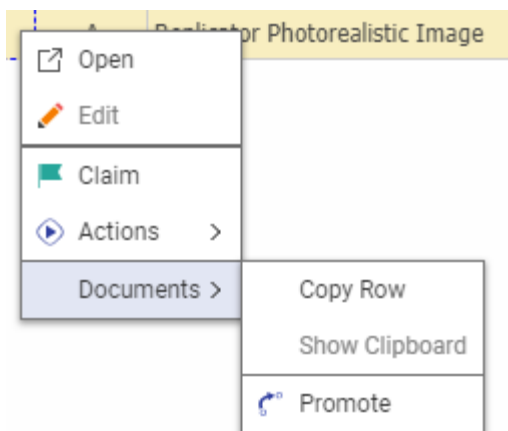
Important

For further information regarding Tree Grid View usage, refer to the *Aras Innovator – Tree Grid View Administrator Guide*.

In a **Relationships** content area, single clicking on an item highlights the **item** for further actions. Right-clicking highlights the **item** and opens its context menu. In a **Relationships grid**, double-clicking opens the Item in a new tab. Standard Aras Innovator search procedure are applicable to the **Relationships** grids.

Relationship Context Menu

A **Relationship** context menu contains commands for a relationship and related items. This menu can be accessed by right clicking on an item. The **Relationship** context menus are dynamic and variable. The list of available actions depends on the type and life cycle state of the related item, the relationship type, and permissions. Actions that are common to most relationship context menus are explained here.



- **Open** displays an Item in a new tab in view mode.
- **Edit** claims the item and launches it in edit-in-row mode.
- **Done Editing** unclaims the item, saves changes made to it in its table row, and stops edit-in-row mode.



- **Discard Changes** unclaims the item, undoes changes made to it in its table row, and stops edit-in-row mode.
- **Replace** replaces the Item in its table row with another Item while retaining any existing relationship information.
- **Remove** deletes the Item from the table.
- **Claim** explicitly locks an item to prevent editing by other users and keeps the item locked/claimed between sessions. For details, refer to section [Item Claiming](#) .
- **Unclaim** releases the claim from the item.
- **Actions → Add Item(s) to Change** opens the **Choose Change Item** dialog to select the change type with an option to create a new change or add to an existing change. For details, refer to section Change Management.
- **Copy Row** copies the Item to the clipboard.
- **Show Clipboard** opens the Clipboard Manager dialog.
- **Promote** takes the item to its next life cycle state if any is available. For details, refer to section Manual Promotion and Revise.

Item Claiming

Claiming an item explicitly locks the item to prevent editing by other users. Users can edit only items claimed by themselves. An unclaimed item automatically becomes claimed when a user puts it in Edit mode, and it becomes unclaimed when the user exits Edit mode.

An item can be claimed by selecting the Claim flag null on the item page or by right-clicking on the item from a search grid or relationship grid and selecting Claim.

When you claim an item, the item will display a green claim flag null . When an item is claimed by another user, the item will display a red claim flag null .

