

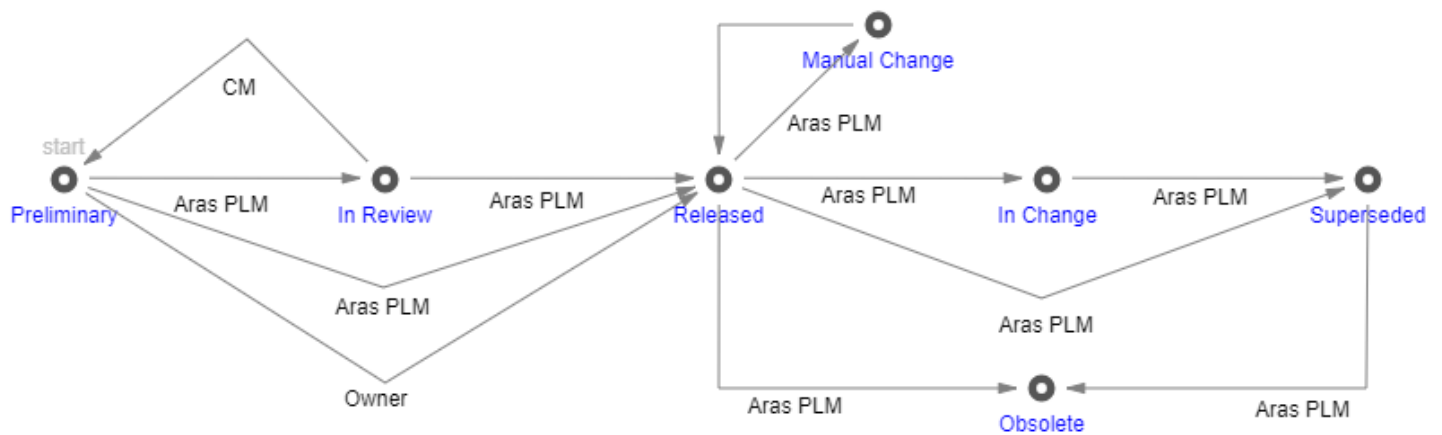
Documents

A Part can have one or more Documents associated with it. A Document can be a drawing, a specification, quality control, etc. Documents can have associated files. Documents are an important component of any Part since they can describe how to make the specific Part or its expected performance and function. Documents also play an important role in Change Management.

Documents Life Cycle

By default, the Document Life Cycle has the following states: Preliminary, In Review, Released, Manual Change, In Change, Superseded, and Obsolete. An Aras administrator can change the Life Cycle Map as needed to meet specific business needs.

The following figure shows the default Document Life Cycle. A new Document starts in the **Preliminary** state and can be released manually in its early stages, or via a change process as it matures. Refer to sections Manual Promotion and Revise and [Change Management](#) for details.



Creating a Document

To create a new Document:

1. Go to **Contents** → **Documents** → **Documents**.
2. Click **Create New Document**. The new Document appears. Enter the necessary information.



Document 1

Save
 Done
 Delete

^ Document

Document Number

Revision

State

Assigned Creator

[Select an image...](#)

Name

Designated User

Type

Authoring Tool

Version

Effective Date

Description

From Template

☐ Files Attached
 ☐ Changes Pending
 ☐ Template

^ Files Changes

Files

Hidden

Related File [...]
 File Type [...]
 Comments
 Sequ...

 Is Shared

- **Document Number** – (Required) The number for the Document. The Document Number must be unique.
- **Name** – The name of the Document.
- **Type** – This is the classification type for the Document. The classification dialog displays the Document classification tree. The Document classification tree can be adjusted and extended as needed by an administrator.
- **Authoring Tool** – The application used to create the Document.
- **Version** – The version of the authoring tool.
- **Description** – Remarks about the Document.
- **Assigned Creator** – This is the user responsible for the design or the content of the Document. The Assigned Creator is often identified as the Owner of the item, who may be



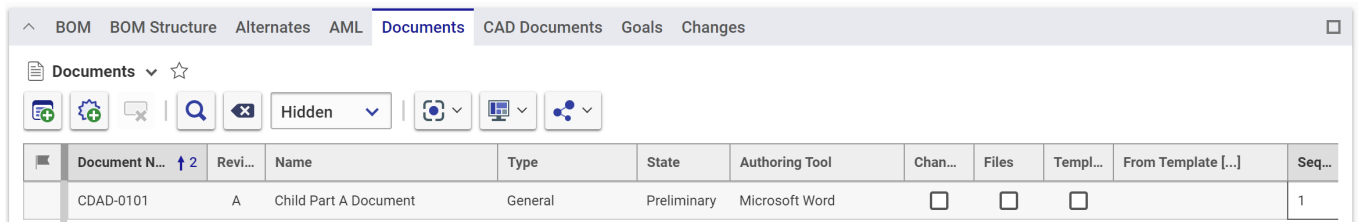
different from the user creating the Document in the system.

- **Designated User** – This is the user responsible for the management, usage, and review of the Document.
 - **Effective Date** – This is the date when a Document actually goes into publishing or the process that signifies its availability. This can be different from the release date, which is when the Document reaches the Released state in its life cycle.
 - **Select an image** – This allows you to select an image using the Image Browser to generate a thumbnail for the Document. For more details, refer to section 2.4.6 Item Thumbnail.
 - **Extended Classification** – This allows you to assign values to Items based on the Item's extended classification.
 - **Template** – Identifies whether a Document is a template.
3. If it is necessary to add a file, in the Files tab, select New File to select a file for upload, or drag and drop the desired file into the Files area.
 4. Once you have entered the necessary information, click **Save** or **Done** to save your changes.

Creating a Document from a Part

To create a new Document and add it to a Part:

1. Open the **Part** where the Document will be added.
2. Click **Edit**.
3. Go to the **Documents** tab.
4. Click New Document. A new Document view appears. A row also appears in the Documents grid on the Part.
5. If it is necessary to add a file to the Document, in the Files tab, select New File to select a file for upload, or drag and drop the desired file into the Files area.
6. Once you have entered the necessary information, click **Done** to save your changes.
7. Close the new Document. The new Document appears in the Documents tab on the Part.



Document N...	Revi...	Name	Type	State	Authoring Tool	Chan...	Files	Templ...	From Template [...]	Seq...
CDAD-0101	A	Child Part A Document	General	Preliminary	Microsoft Word					1



8. Click **Save** or **Done** on the Part to save your changes.

Managing Part Documents

For a single Part, you can add, replace, and remove Documents.

Adding Documents to a Part

To add an existing document to a Part:

1. Open the **Part** where the Document will be added.
2. Click **Edit**.
3. Go to the **Documents** tab.
4. Click Add Documents . The Search dialog appears.
5. Search for and select a Document to add.
6. Click **Save** or **Done** to save your changes.

Replacing Documents in a Part

To replace a document in a Part:

1. Open the **Part** where the Document will be added.
2. Click **Edit**.
3. Go to the **Documents** tab.
4. Right-click on the Document to be replaced → **Replace**. The Search dialog appears.
5. Search for and select a Document. The selected Document replaces the selected Document.
6. Click **Save** or **Done** to save your changes.

Removing Documents from a Part

To remove a Document from a Part:

1. Open the **Part** where the Document will be added.
2. Click **Edit**.
3. Go to the **Documents** tab.
4. Click the Document to be deleted and then click Delete Part Document .
5. Click **Save** or **Done** to save your changes.

Managing Document Files



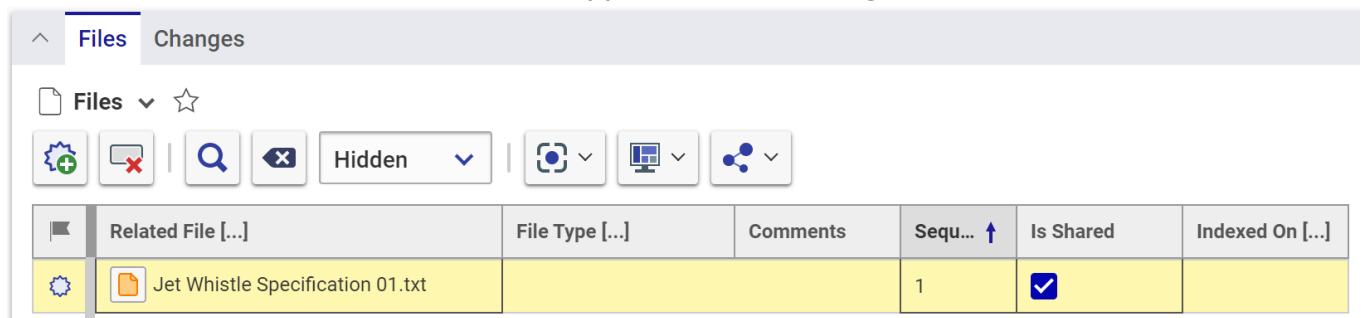
For a single Document, you can add, download, replace, and remove Files. All Files are kept in the Aras Innovator Vault.

Files are not versionable, but Documents are. When you make an edit to Document Files, a new version of the Document is created. Old versions of the Document reference old Files. For example, if you replaced File A with File B, the previous version of the Document has File A, and the current one has File B. To access old Files, you can view the corresponding Document version. For details about how to access Document versions, refer to section [Versions Exploration](#).

Adding Files to a Document

To add a File to a Document:

1. Open the **Document**.
2. Click **Edit**.
3. Go to the **Files** tab.
4. Click New File. The standard operating system dialog for file browsing and selection appears.
5. Search for and select a File. A new row appears in the **Files** grid with the file attached.



6. Enter any necessary information:
 - o **File Type** – The file type. This property is an optional property, and if left blank, Aras Innovator will automatically assign a file type depending on the File's extension once the Document is saved.
 - o **Comments** – Remarks about the File.
 - o **Is Shared** – Determines whether the File is shared with other users. If it is necessary to hide the File from other users, uncheck the Is Shared check box.
7. Click **Save** or **Done** to save your changes.

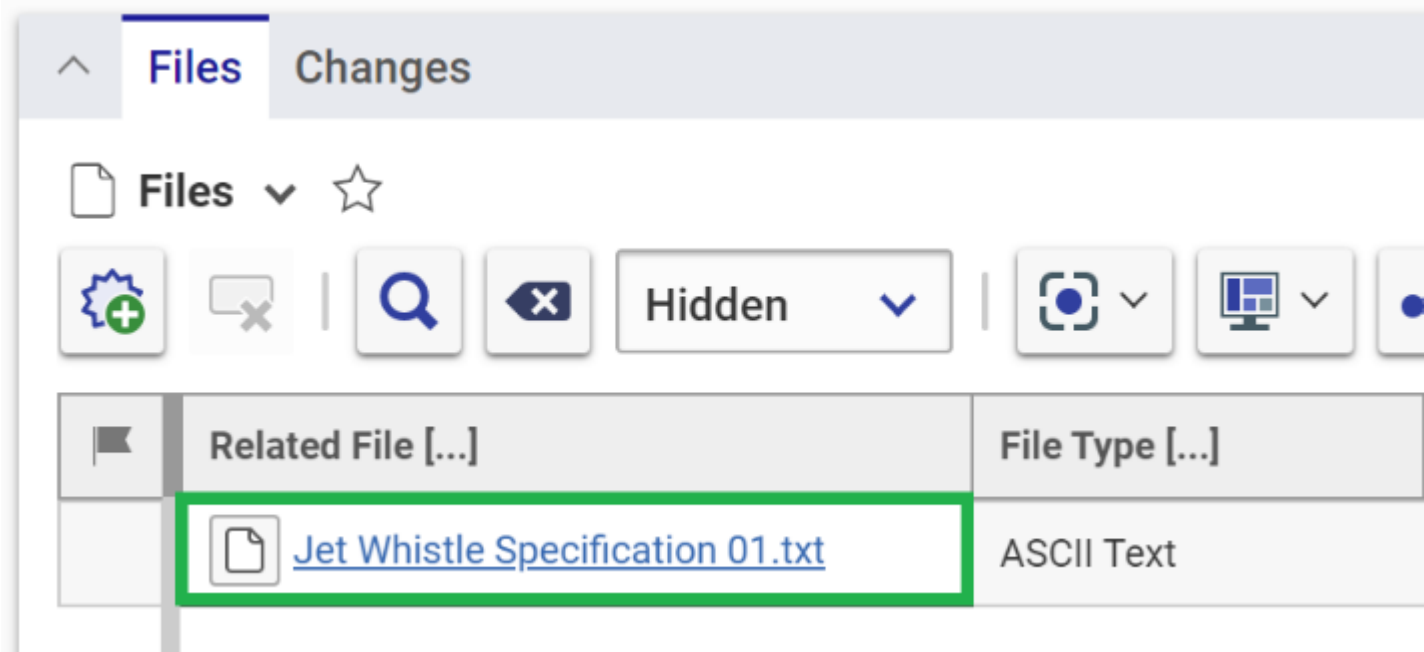
Working with Files

In this section, it is assumed that you are working with the current Document version.



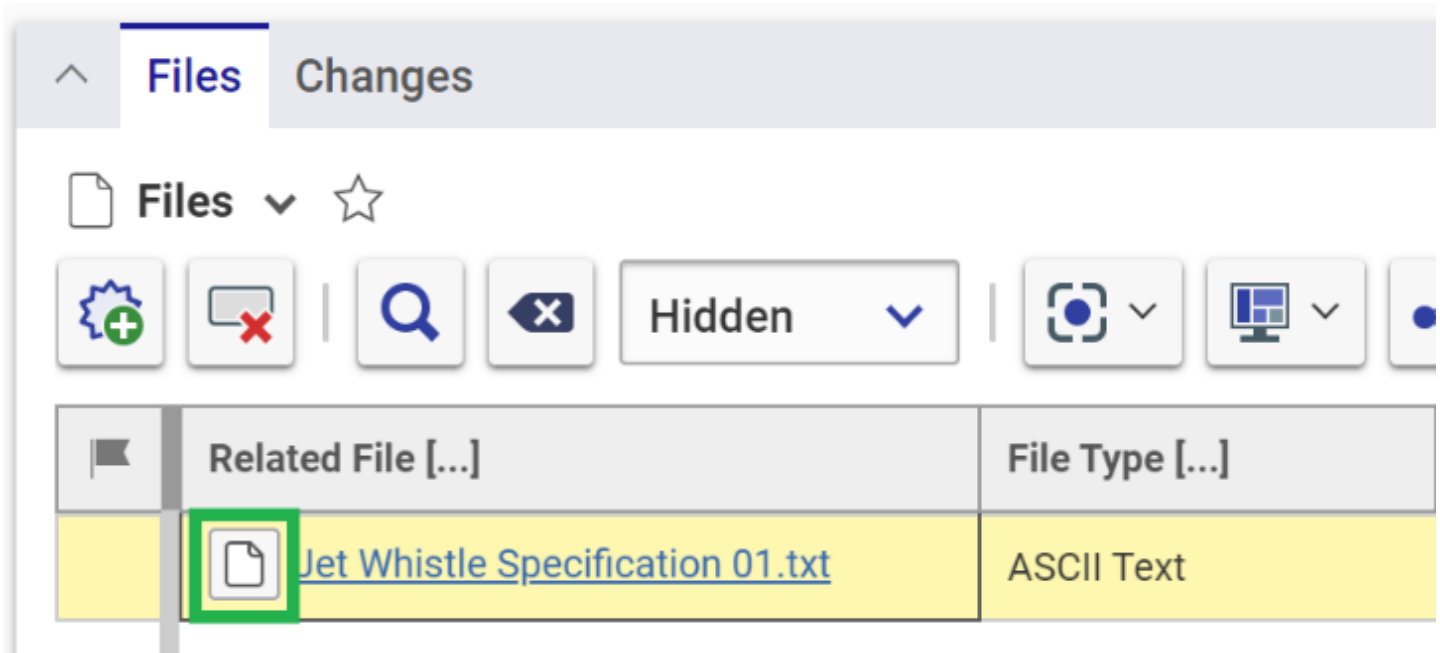
To work with Files attached to a Document, you can download them from the Aras Innovator Vault, where they are kept.

Files can be downloaded by clicking on the hyperlink in the Files tab on the Document:



Files can also be downloaded through the **Manage File** dialog:





You can either select the hyperlink in the Manage File dialog or use the Download file button to download the File.

Manage File



[Jet Whistle Specification 01.txt](#)

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OK

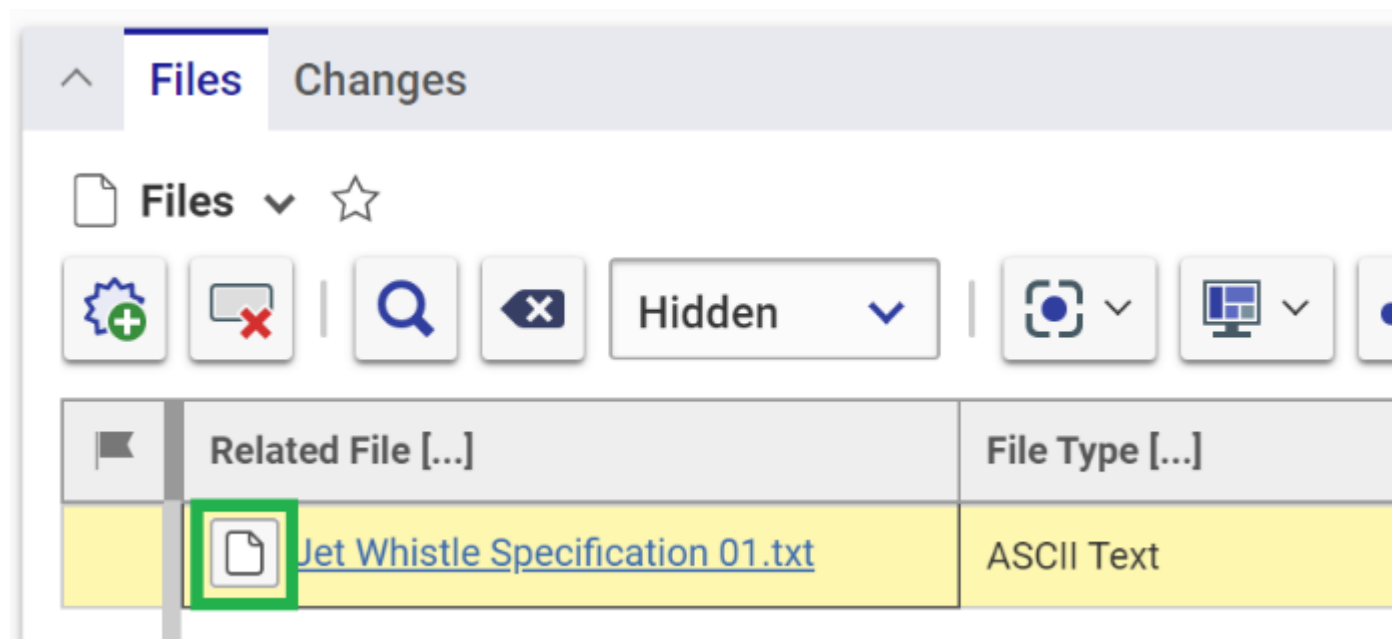
Cancel

Replacing Files in a Document



To replace a File, you can remove the old File from a Document and then attach the replacing File while keeping the Document in the **Edit** mode. Refer to sections Adding Files to a Document and Removing Files from a Document to use this approach.

1. Files can also be replaced using the **Manage file** dialog:



You can click the Select new file button to replace the existing file.

Manage File



[Jet Whistle Specification 01.txt](#)

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OK

Cancel



Removing Files from a Document

To remove a File from a Document:

1. Open the **Document**.
2. Click **Edit**.
3. Go to the **Files** tab.
4. Click the file to be removed and click Delete Document File .
5. Click **Save** or **Done** to save your changes.

Important

The **File** disappears immediately if the Document was not saved after it was added.

Deleting Documents

It is possible to delete all or some versions of a Document. This subsection outlines the former case, in which the Document is deleted from Aras Innovator completely. For details on the latter case, refer to section Version Deletion.

To delete a Document completely, you must have **Delete** rights granted in Permissions for all Life Cycle states of the Document, including the current one. For example, if the latest Document revision is currently in the Preliminary state, but has Released revisions, you must have the **Delete** rights granted in Permissions for both life cycle states. For details on access rights, refer to section Permissions. This subsection assumes that you have all necessary rights.

Important

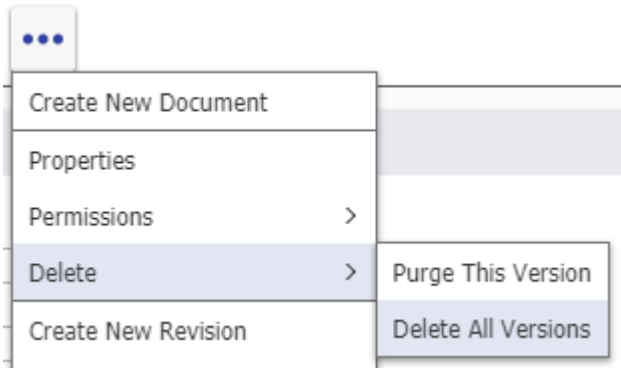
Documents that are claimed by any user or are used on other items cannot be deleted.

You can delete a Document using either its view or the context menu in the Documents Search Page.

To delete a Document using its view:

1. Open the Document.
2. On the Document toolbar, click **More** → **Delete** → **Delete All Versions**.





3. Click **OK** in the confirmation dialog to delete the Document.



Deleting item "ACMD-0101". Are you sure?



To delete a Document using its context menu:

1. Go to the Documents Search Page.
2. Right-click the Document to be deleted and click **More** → **Delete** → **Delete All Versions**.
3. Click **OK** in the confirmation dialog to delete the Document.

If a Document has only one version, you can delete it using the **Purge This Version** feature. For details about this feature, refer to section Version Deletion. For details about how to find out if the current version is the only one, refer to section Versions Exploration.

Finding Where Used and Comparing Documents

Aras Innovator offers the Where Used feature to determine where an Item is used by other Items. Refer to section Finding Where an Item is Used for further information. All examples in that section are applicable to Documents.



To compare Items side-by-side, Aras Innovator offers the Structure Browser. Refer to section [Comparing Items](#) for further information. All examples in that section are applicable to Documents.

