

Table of Contents Editor

This section describes the functionality of the Table of Contents (TOC) Editor.

Purpose of the Table of Contents Editor

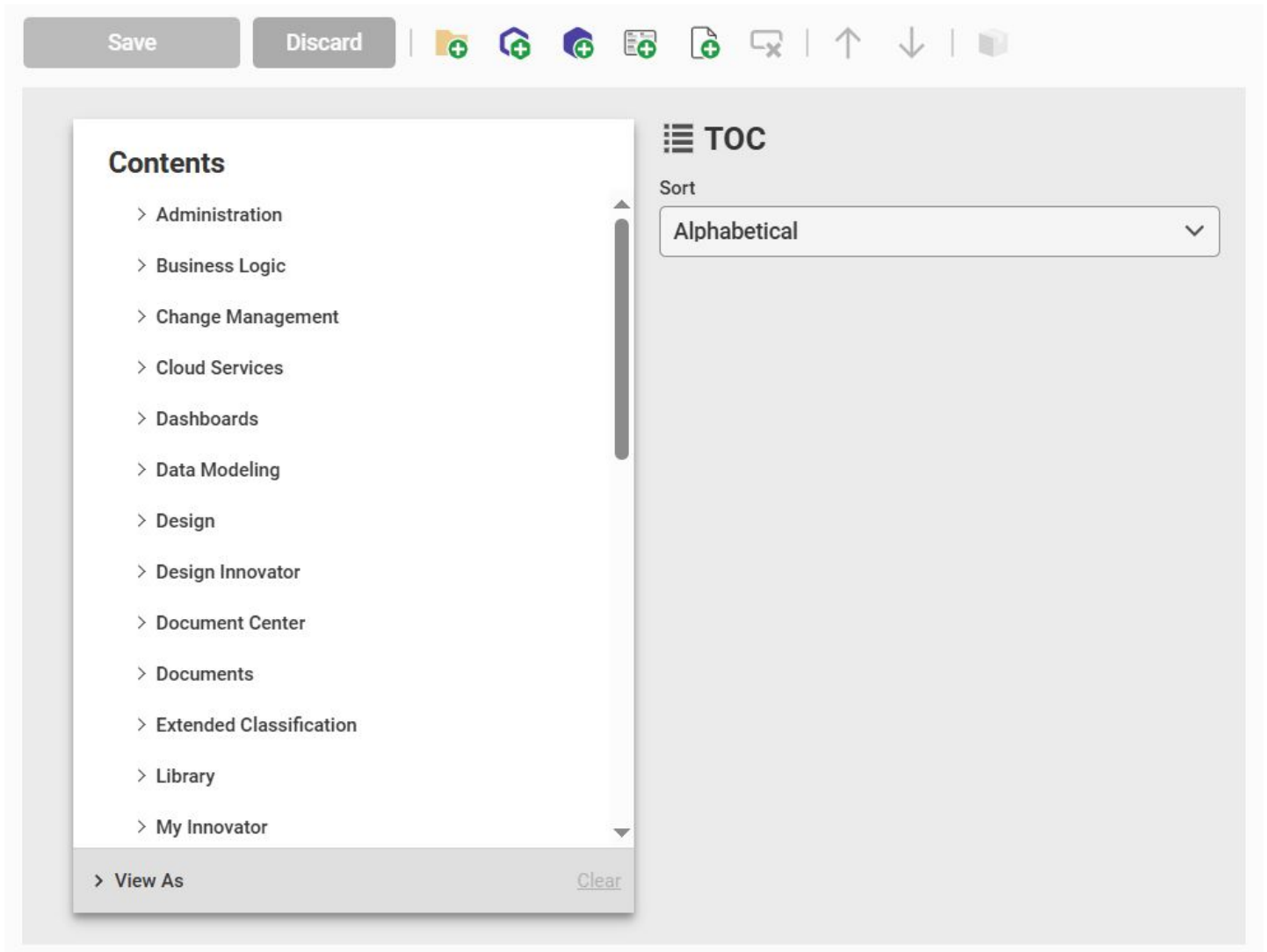
The TOC Editor provides a WYSIWYG-style editing experience for administrators who configure the Aras Innovator table of contents. This feature is intended to meet the following goals.

1. **Reduce Context Switching:** Admins can configure all TOC content in a single interface. No need to switch between tabs and edit individual ItemTypes.
2. **Improve Visibility:** Admins can instantly see the results of their edits without logging out and back into Aras Innovator. The “View As” functionality also enables admins to see the TOC view for different users and groups, making it easier to test and troubleshoot their updates.
3. **Simplify Packaging:** The TOC Editor automatically packages the CUI objects that are used to render the TOC controls.

Understanding the Editor Interface

The TOC Editor is comprised of three main sections: the toolbar, the contents pane, and the details pane.





Viewing the TOC Editor

Editor Toolbar

The TOC Editor toolbar contains the following controls.

- **Save:** Saves the current changes in the editor. If the editor tab is closed before the user clicks Save, all changes made since the last save will be lost. This button will be disabled if there are no changes in the editor.
- **Discard Changes:** Discards the current changes in the editor. This button will be disabled if there are no changes in the editor.

- **Add Category:** Adds a new Category to the TOC. If another Category is selected when this button is clicked, the new Category will be created as a child of the selected Category. If no Category is selected, the new Category will be created at the bottom of the TOC.
- **Add ItemType:** Adds a new ItemType button to the TOC. If a Category is selected when this button is clicked, the new ItemType button will be created as a child of the selected Category. If no Category is selected, the new ItemType button will be created at the bottom of the TOC.
- **Add Item:** Adds a new Item button to the TOC. An Item button displays a specific item in a new tab when a user clicks it. If a Category is selected when this button is clicked, the new ItemType button will be created as a child of the selected Category. If no Category is selected, the new ItemType button will be created at the bottom of the TOC.
- **Add Form:** Adds a new Form button to the TOC. A Form button displays an Aras Innovator form in a new tab when a user clicks it.
- **Add Page:** Adds a new Page button to the TOC. A Page button displays an HTML page in a new tab when a user clicks it.
- **Delete:** Deletes the currently selected Category or ItemType button.
- **Move Up:** Moves the selected Category or ItemType button within its parent Category. This button will be disabled if the selected Category or ItemType button cannot be moved higher.
- **Move Down:** Moves the selected Category or ItemType button within its parent Category. This button will be disabled if the selected Category or ItemType button cannot be moved lower.

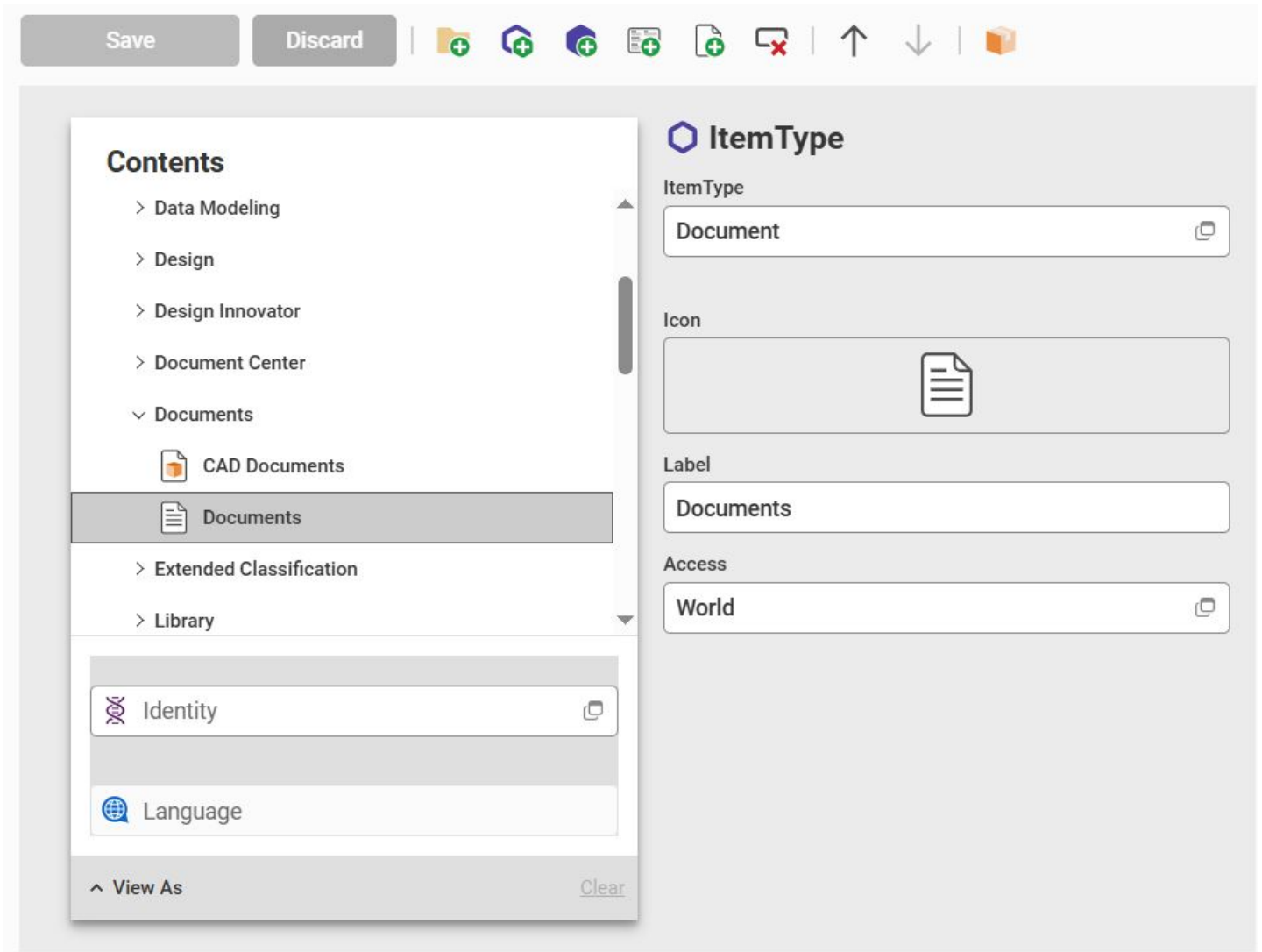
Contents Pane

The pane on the left side of the TOC Editor displays all Categories and ItemType buttons that are configured in the Aras Innovator database. It also includes several options for filtering the content.

View As: Identity

Using the Identity “View As” filter at the bottom of the Contents Pane, admins can choose to view only the TOC configuration for a specified user or group. The TOC Editor will enter a read-only mode when the View As filter is active.



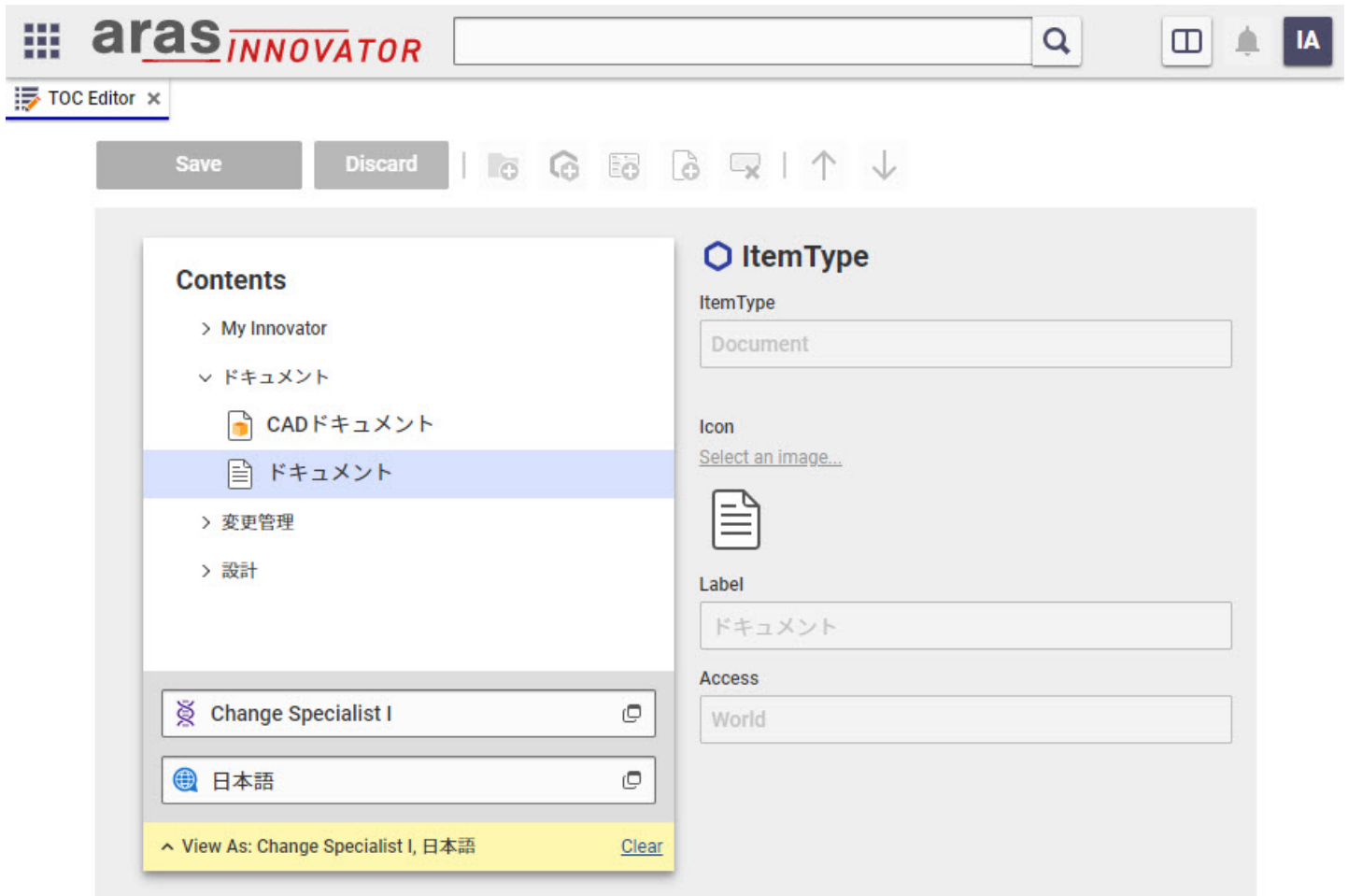


Viewing the TOC as a member of Change Specialist I

View As: Language

Using the Language “View As” filter at the bottom of the Contents Pane, admins can choose to view a user’s or group’s TOC configuration in a specific language. The TOC Editor will enter a read-only mode when the View As filter is active.





Viewing the TOC as a Change Specialist I with Japanese client settings

Important

The Language filter will be enabled only when an Identity is specified and there are two or more languages configured in the Aras Innovator database. For more details on configuring Aras Innovator for multiple languages, please refer to the Configuring Internationalization documentation.

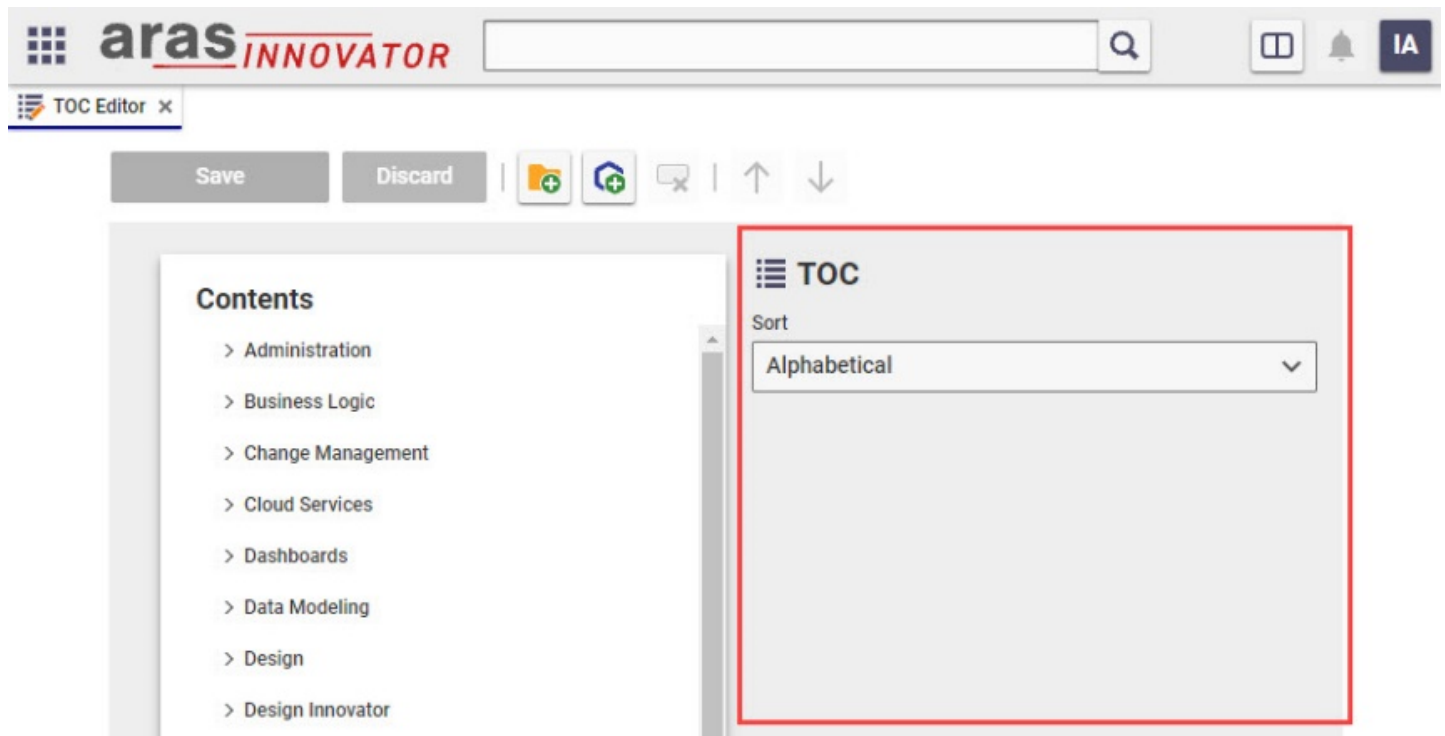
Details Pane

The pane on the right side of the TOC Editor displays a form for viewing and editing the properties of the selected row in the Contents Pane.

No Item Selected



When no items are selected in the Contents Pane, the Details Pane shows general properties for the TOC. This is the default view when the TOC Editor opens.



Properties for the TOC are shown when no items are selected

- **Sort:** Determines the order that the Aras Innovator web client renders the TOC elements.
 - **Alphabetical:** The default setting is *Alphabetical*, which sorts TOC Categories and their child items in alphabetical order. This setting is consistent with the behavior of Aras Innovator 12 and earlier releases.
 - **Custom:** This setting sorts the TOC Categories and ItemType buttons according to the order defined in the TOC Editor.

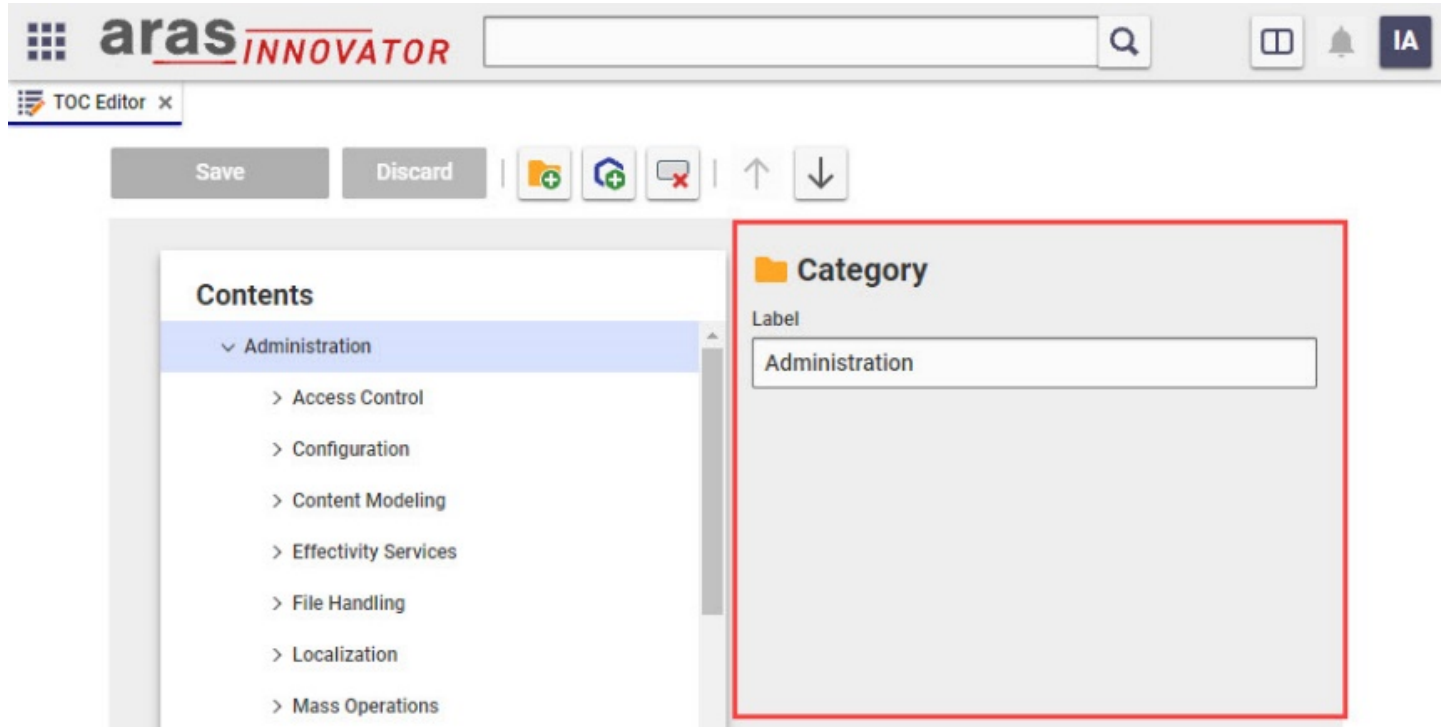
Important

The order of items in the Contents Pane and the actual TOC may appear different when the sort properties is set to *Alphabetical*.

To deselect an item in the Contents Pane and show the TOC properties, click the **Contents** header in the Contents Pane.

Category Selected

When a Category is selected in the Contents Pane, the Details Pane shows a form for viewing and editing the properties of that Category.

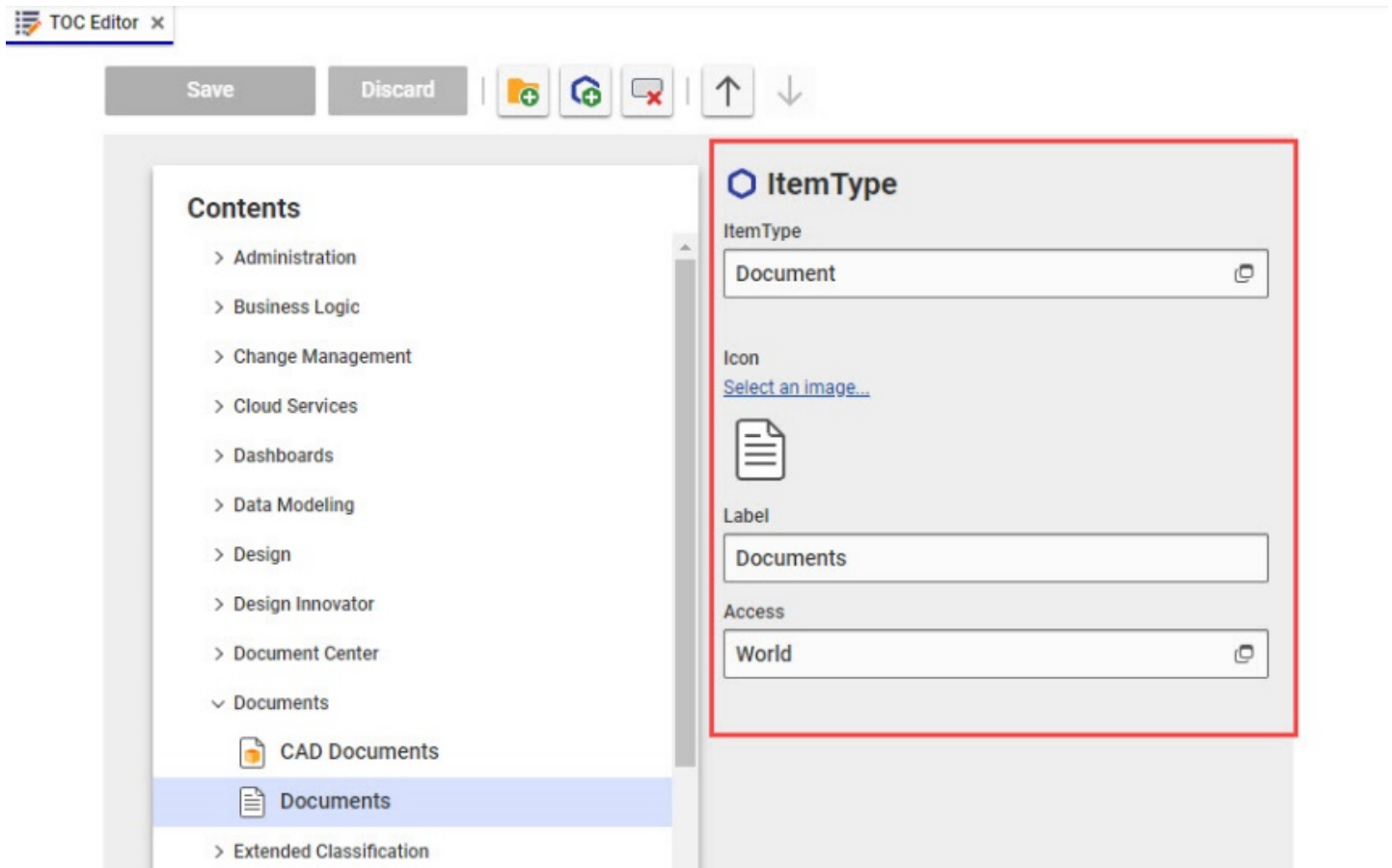


Properties for the selected Category

- **Label:** This multilingual property defines the text that is shown for the Category in the TOC.

ItemType Button Selected

When an ItemType button is selected in the Contents Pane, the Details Pane shows a form for viewing and editing the properties of that ItemType button.



Properties for the selected ItemType button

- **ItemType:** Sets the ItemType associated with the button. When the button is clicked in the TOC, the Navigation Pane will display the user's favorite searches, favorite items, and common actions for that ItemType.
- **Icon:** Defines the icon that appears on the button in the TOC.
- **Label:** This multilingual property defines the text that is shown on the button in the TOC.
- **Access:** Defines which Identity members will see this button in the TOC.

Important

Each button can only be configured for a single Identity. To display an ItemType in the TOC for multiple Identities, either create a separate button for each Identity or use a group Identity that encompasses all individuals or groups who should see that ItemType in the TOC.

Item Button Selected



When an Item button is selected in the Contents Pane, the Details Pane shows a form for viewing and editing the properties of that Item button.

The screenshot displays the Aras Innovator user interface. At the top is a header bar with the 'aras INNOVATOR' logo, a search bar, and navigation icons. Below the header is a 'TOC Editor' tab. A toolbar contains buttons for 'Save', 'Discard', and various file management actions. The main area is divided into two panes. The 'Contents' pane on the left shows a tree structure with categories like Library, My Innovator, Package Innovator, Portfolio, Programs, Projects, Customers, Part Submission Warrants, Locations, and Engineering Dashboard (which is selected and highlighted in blue). Below the 'Contents' pane is a 'View As' button. The 'Details' pane on the right, titled 'Item', shows the properties for the selected 'Engineering Dashboard'. The properties include: 'ItemType' (cui_Dashboard), 'Item' (Engineering Dashboard), 'Icon' (a chart icon with a link to 'Select an image...'), 'Label' (Engineering Dashboard), and 'Access' (All Employees). The 'Details' pane is highlighted with a red border.

Properties for the selected ItemType button

- **ItemType:** Defines the type of item that can be selected as the context item for the Item button.
- **Item:** Defines the specific item that will be displayed in a new tab when a user clicks the Item button.



- **Icon:** Defines the icon that appears on the button in the TOC.
- **Label:** This multilingual property defines the text that is shown on the button in the TOC.
- **Access:** Defines which Identity members will see this button in the TOC.

Important

Each button can only be configured for a single Identity. To display an Item in the TOC for multiple Identities, either create a separate button for each Identity or use a group Identity that encompasses all individuals or groups who should see that Item in the TOC.

Form Button Selected

When a Form button is selected in the Contents Pane, the Details Pane shows a form for viewing and editing the properties of that Form button.

The screenshot shows the TOC Editor interface. On the left, the 'Contents' pane lists various items, with 'My Identity Map' selected. On the right, the 'Form' details pane is open, showing the following properties:

- Form:** Identity Map
- Icon:** Select an image... (with a blue person icon below it)
- Label:** My Identity Map
- Access:** Administrators

Properties for the selected ItemType button



- **Form:** Sets the Form associated with the button. When the button is clicked in the TOC, the Form will display in a new Aras Innovator tab.
- **Icon:** Defines the icon that appears on the button in the TOC.
- **Label:** This multilingual property defines the text that is shown on the button in the TOC.
- **Access:** Defines which Identity members will see this button in the TOC.

Page Button Selected

When a Page button is selected in the Contents Pane, the Details Pane shows a form for viewing and editing the properties of that Page button.

The screenshot shows the TOC Editor interface. On the left, the 'Contents' pane lists various items, with 'My Dashboard' selected. On the right, the 'Details' pane shows the properties for the selected 'Page' button. The properties include:

- Start Page:** A text field containing './Dashboard.html'.
- Parameters:** A text field containing 'dashboardName=Design To Goal'.
- Icon:** A section with a 'Select an image...' link and a bar chart icon.
- Label:** A text field containing 'My Dashboard'.
- Access:** A text field containing 'Administrators'.

Properties for the selected ItemType button

- **Start Page:** Specifies the path of an HTML page to display when the button is clicked. This should be an HTML file in the code tree, and the path should be relative to the *Innovator/Client/scripts* directory.

- **Parameters:** Optional. Passes parameters for the HTML page to use.
- **Icon:** Defines the icon that appears on the button in the TOC.
- **Label:** This multilingual property defines the text that is shown on the button in the TOC.
- **Access:** Defines which Identity members will see this button in the TOC.

Importing and Exporting

Packaging Aras Innovator configuration data to share changes between developers or different environments, like test and production. This section provides information on how to handle packages that include TOC configuration data.

Exporting TOC Elements

The TOC Editor manages the underlying CUI items that define and render the TOC controls in the Aras Innovator web client. These CUI items need to be packaged to export the TOC configuration to another Aras Innovator instance.

ItemType Buttons

The TOC Editor automatically adds each ItemType button to the package that contains its associated ItemType. For ItemTypes that belong to package definitions, admins can simply export the packages and import them into another environment. If an ItemType button references an ItemType that does not belong to a package, there are a couple options. One option is to remove the button from the TOC, package the ItemType, and then recreate the button in the TOC Editor. This will automatically package the button. The second option is to manually package the CUI items that define the ItemType button. The following steps demonstrate how to manually package a custom “Part” ItemType button.

Important

To simplify these steps, it's recommended to download and install the [CUI Add to Package](#) community project from the Aras Labs GitHub page. It's possible to perform the same tasks without the project's helpful “Add to Package” action. However, this requires adding the CommandBarSection and CommandBarMenuButton ItemTypes to the TOC and searching for the relevant items to package.

1. Navigate to **Administration > ItemTypes** in the TOC.
2. Search for the *Part* ItemType and open it.
3. Click the **Client Style** relationship tab and open the Presentation Configuration item.



4. In the Command Bar Section grid, open the **Part_TOC_Content** item.
5. In the Command Bar Item grid, open the Menu Button item that corresponds with the custom ItemType button in the TOC. The format of the name will resemble `com.aras.innovator.cui_default.toc_Part_ <GUID>`.
6. Click the “...” button in the toolbar and select **Add to Package Definition**.
7. **Choose the package** from the list that the Menu Button will be assigned to.
8. **Close** the Menu Button item, Command Bar Section item, Presentation Configuration item, and ItemType tabs.

The custom ItemType button is now packaged and can be exported with the export utility.

Important

The CUI items that define ItemType buttons should be packaged with the ItemType they're assigned. If they are assigned to a different package, that package definition must have a “depends on” relationship to the package definition containing the ItemType.

Categories

Since Categories are not explicitly assigned an ItemType, they must be packaged manually. The following steps demonstrate how to package a custom Category called “Design Pros”.

Important

To simplify these steps, it's recommended to download and install the [CUI Add to Package](#) community project from the Aras Labs GitHub page. It's possible to perform the same tasks without the project's helpful “Add to Package” action. However, this requires adding the CommandBarSection and CommandBarMenuButton ItemTypes to the TOC and searching for the relevant items to package.

1. Navigate to **Administration > Configuration > Client Presentation** in the TOC.
2. Click the **Search** button to run the Client Presentation search.
3. Click the **Global** item property in the single search result.
4. In the Command Bar Section grid, open the **com.aras.innovator.cui_default.toc** item.
5. In the Command Bar Item grid, open the Menu item that corresponds with the custom Category in the TOC. The format of the name will resemble `com.aras.innovator.cui_default.toc_ <GUID>`.
6. Click the “...” button in the toolbar and select **Add to Package Definition**.
7. **Choose the package** from the list that the Menu will be assigned to.



8. **Close** the Menu item, Command Bar Section item, Presentation Configuration item, and ItemType tabs.

The custom Category is now packaged and can be exported with the export utility.

Important

The CUI items that define Categories should be packaged in the `com.aras.innovator.cui_default` package or a package definition with a “depends on” relationship to the `com.aras.innovator.cui_default` package.

Importing TOC Elements

Packages Containing TOC Access or TOC View

Prior to Aras Innovator Release 14, admins defined the TOC using the legacy TOC Access and TOC View relationships on ItemTypes. These relationships are no longer used as of Release 14, however, packages exported from Aras Innovator 12 SP20, or earlier releases may still include this data. These packages can be imported into Release 14+, but they will need a few updates to properly capture the TOC configuration.

Important

Subscribers upgrading to Aras Innovator Release 14+ from an earlier release of Aras Innovator will not need to perform these steps for any packages in the scope of an Aras Upgrades service project. For questions about the Aras Upgrade subscription benefit, please contact Aras Support at the Aras Subscriber Portal.

The following steps are required to update a package that contains TOC Access or TOC View data.

1. Import the package into Aras Innovator (Release 14 or greater).
2. For each TOC Access relationship in the package, create a new ItemType button using the TOC Editor. The “Access” property of each button should match the Identity related to the TOC Access relationship in the package.

Important

The TOC Access and TOC View relationships will not be visible on the ItemType form in the Aras Innovator web client. To find this data, review the AML files in the ItemType subdirectory of the package.



3. For each TOC View relationship in the package, create a new Form or Page button following the steps in 4.4.7 or 4.4.8 in this guide.
4. Export the package using the export utility.

The package can now be imported to Aras Innovator Release 14+ without additional manual steps.

