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DISCOVER INNOVATOR  
RELEASE 3.5  
USER'S GUIDE

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**Version 1.0**

# Discover Innovator User's Guide

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## 1 INNOVATOR LAYOUT

Discover Innovator provides the user with a simple Google-like interface to quickly and easily find Documents, Parts and other Innovator items. The following section describes the layout and behavior of the as-installed user interface.

The screenshot displays the Discover Innovator web application interface. The browser address bar shows the URL <http://192.168.238.131/> and the page title is "Aras Innovator - Windows Internet Explorer". The local time is Friday, August 29, 2014, at 1:27 PM. The application header includes the "aras INNOVATOR" logo and a "NorthRidge SOFTWARE" logo. The main navigation menu on the left includes "Administration", "Change Management", "Cloud Services", "My Innovator", "Portfolio", "Sourcing", "Templates", and "Discover Innovator". The "Discover Innovator" section is highlighted. The main content area is divided into a "Search" section and a "Results" section. The "Search" section has a search term of "controller" and a "Find" button. The "Results" section displays a list of search results, including "SP-00000044 2011 T Express" and "P00000043 CONTROLLER". Callouts point to the "Search Section", "Results Section", "Selection Section", and "Filter Section".

Discover Innovator is accessed by selecting the link from the Innovator TOC. The default configuration places a Discover Innovator item at the first level of the TOC. Your system administrator may change both of those conditions.

## 2 DISCOVER INNOVATOR PAGE LAYOUT

The Discover Innovator page is separated into 4 sections.

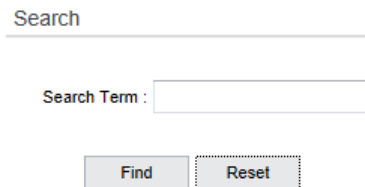
- Search - the user enters the search term from this section
- Filter - this section displays properties from which the user can filter the result list
- Results - all items that meet the search criteria are displayed in this section
- Selections - this section presents the list of currently selected filters

### 2.1 SEARCH SECTION

The Search section of the UI is where the user provides the search terms used to generate results.

#### 2.1.1 AS-INSTALLED FIELDS

The default installation of this section contains a single *Search Term* field as shown below.



The screenshot shows a search interface. At the top, the word "Search" is displayed above a horizontal line. Below this, the text "Search Term:" is followed by a rectangular input field. Underneath the input field are two buttons: "Find" and "Reset".

The value entered in this field searches against file content and an subset of Innovator properties. The *Item Name*, *Created By* and *Description* properties are included in the search by default. Additional properties can be included by the NS-Discover administrator.

#### **Functions**

1. Find - selecting the Find button will execute the search as defined by the values entered into the search fields. If Filter selections have been made, executing a find request will include the filter selections in the search.
2. Reset - selecting the Reset button will set the Search fields and Filter fields back to their default, empty values. The results list will be refreshed so that no results are displayed.

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## Search Tips

The following table provides tips for enhancing the user's search capabilities. These rules apply to **text** type fields, of which Search Term is one example.

Term Type	Example	Finds all content where ...
Single Word	controller	<i>controller</i> is included the word. The word must be preceded and followed by white spaces.
Multiple Words	controller GTS	<i>controller</i> OR <i>GTS</i> is included anywhere in the content. This query will always return the same number of more results than either of the individual words.
Quoted Words	"controller GTS"	<i>controller</i> is followed immediately in the content by <i>GTS</i>
Proximity Search	"controller GTS"~5	<i>controller</i> and <i>GTS</i> are found within 5 words of each other in the content
Match All Words	controller AND GTS	both <i>controller</i> and <i>GTS</i> are included in the content. This query will always return the same number of fewer results than either of the individual words.
Wildcard	control*	the word to be matched begins with <i>control</i> . In this example, <i>controller</i> , <i>controlling</i> and <i>controls</i> would all match.
Single Character Match	bl?ck	replacing the ? with one character will match. In this example, black and block would match.
Fuzzy Search	controller~	the words found are very close to <i>controller</i> (i.e. <i>contoller</i> ). This is a very effective way to find documents where the search term may have been misspelled.
Grouping	golf (controller AND GTS)	<i>golf</i> is included in the content OR, <i>controller</i> AND <i>GTS</i> are included in the content.
Property Search	author:Mike	the field <b>author</b> includes the value <i>Mike</i> . All the rules shown above related to the word combinations apply to the value.
Numeric Range	Quantity:[2 TO *]	the field <b>quantity</b> has a value greater than 1.
Date Range	modified_on:[* TO 2007-03-06T00:00:00Z]	the field <b>modified_on</b> was any date before March 6, 2007.

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## 2.1.2 MULTIPLE SEARCH FIELDS

Discover Innovator allows the system administrator to include additional fields in the search section. If additional fields are included in the Search section, queries will be executed using values from all the populated fields as described below.

1. Any fields that contain values will be included in the search criteria
2. The default Search Term field behaves as described in the previous section
3. Values in any of the other fields will be applied against the associated Innovator property. For instance, you enter A into the Revision field, only items whose revision is equal to A are returned.
4. Results need to match each of the fields with values

If, for example, you enter search criteria as shown below, the query logic will be as described below.

Search

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Search Term :

Title :

Modified On :

Results will be included for items that:

- include *stepstruder* in the content, AND
- were modified between 11/5/2013 and 8/11/2014

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## 2.2 FILTER SECTION

The filter section is used to reduce the number of results currently displayed in the results section by allowing the user to select field values by which to filter the results. The following is a sample filter section.

Filter

Item Type : [ ]

Classification : [ ]

Status : [ ]

Modified By : [ ]

Manufacturer :  Innovator Admin (640)  
 Data Administrator (266)  
Revision  Demo User (185)  
 Terry Adams (145)  
Author  Super User (80)  
 Aras PLM (44)  
 Guest 2 Demo (3)  
 Tony Norton (1)

The list of filters is dynamically generated based on the current list of documents in the results list. A filter field will only be displayed if it includes two or more values in the current list of documents in the results.

Clicking on the down arrow of a Filter will display all of the values that are included in at least one of the results. Each listed value will include next to it a count in parenthesis that reflects how many documents in the results set share that property value.

The user can select one or more values from the list. The user must click somewhere outside of the list to complete the selection. The results list will be updated to reflect the filter selection immediately the completion of each filter selection.

NOTE: The counts displayed for each filter value reflect the total number of results that meet the specified search criteria. The number of items in the results section may be less than the total count for any one filter. This is because the results list filters out items to which the current user does not have at least read permission. This is not true of the filter list.

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## 2.3 SELECTIONS SECTION

Upon selection of each filter field value(s), that selection is displayed in the Selection section as shown below.

### Selections

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- Item Type: Part,CAD
- Modified By: Innovator Admin
- Status: Preliminary

The example above will reduce the result set to include only items that have.

- Innovator Admin as the Modified By user
- an Item Type of Part or CAD
- Status of Preliminary

The user can remove any of the filters by clicking on the checkbox to the left of the selection. This will remove the filter and update the results list accordingly.



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## 2.4 RESULTS SECTION

The Results section displays all the items that matched the search criteria. The following is a sample results page for a general search.

The screenshot displays the 'Discover Innovator' search interface. At the top right is the 'NorthRidge SOFTWARE' logo. The search bar contains the term 'controller'. The results section shows a list of items, each with a gear icon, a title, a description, and a 'Last Modified' date and user. The first result is 'SP-00000044 2011 T Express' with a detailed description of its features and a PDF link '2009\_ST\_Express\_ELEC\_TECH\_SPEC.pdf'. The second result is 'P00000043 CONTROLLER' with a description and a 'Last Modified' date of Dec 18, 2009 by Demo User. The third result is 'P00000084 CONTROLLER' with a description and a 'Last Modified' date of Dec 18, 2009 by Demo User. The fourth result is 'D-10200 Extruder Controller PCBA' with a description and a 'Last Modified' date of Mar 19, 2012 by Terry Adams. The fifth result is 'CAD-00001130 CONTROLLER' with a description and a 'Last Modified' date of Mar 19, 2012 by Terry Adams. The page also includes a 'Filter' section on the left with dropdown menus for Item Type, Classification, Status, Modified By, Manufacturer, Revision, and Author. At the bottom, there is a 'Page Size' dropdown set to 20 and a 'Help' icon.

Upon execution of the search, all results are included in the results area with a scroll bar to extend the scope of the display. The default page includes 20 results. Searches that return more than 20 results will allow access to additional documents by navigating to subsequent pages.

### Heading

The heading of the results page presents the user with information on the number of returned documents in the format X - Y, where:


- X is the rank of the first result on the displayed page. For instance, X is equal to 1 for the initial results page for a search.
- Y is the rank of the last result displayed on the page.

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## Toolbar

Results

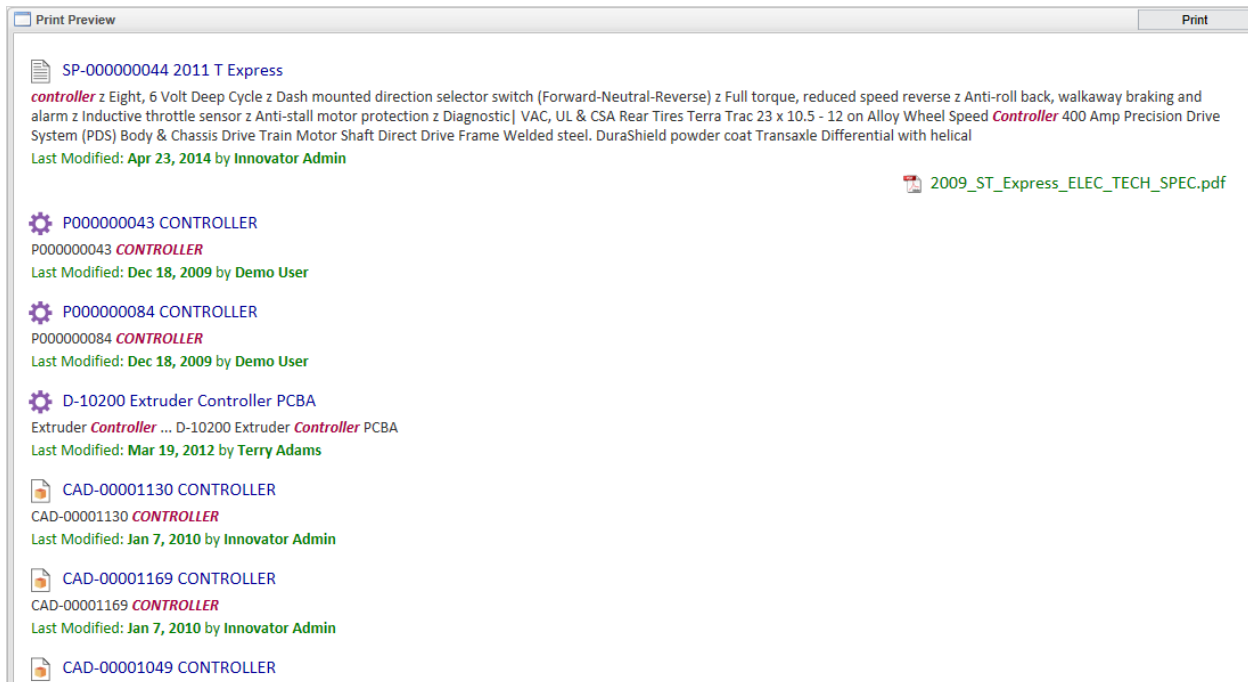
1 - 20

 Print  Charts

 Help

The Toolbar includes the following functions.

1. Print - selecting the Print button will present the user with a preview of the print page as shown below.

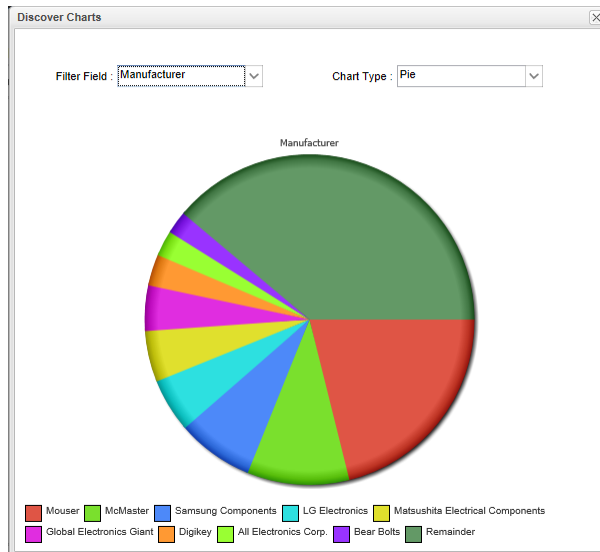


- a. Print - selecting this button will bring up the Windows Print dialog
- b. X - selecting this button will close the Print Preview screen and return the user to the Results page.

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2. Charts – selecting the Charts button will present the user with a chart that reflects the distribution of results for one of the filter values displayed in the Filter section.



- a. Filter Field – selecting this pop up allows the user to select from any of the filters available for the executed search.
  - b. Chart Type – the user can select from 4 different chart types.
3. Help - selecting the Help button will open this document.

## **Body**

The body of the results page is presented as a list of results each of which includes one or more of the following elements. Your display may be different as the complete presentation of results can be modified by the Discover Innovator administrator.

- 1) Icon – the icon for a each item is determined by:
  - a) Its item type as defined in Innovator
  - b) If its type is unknown, a generic icon will be presented
- 2) Title – the title displays the Keyed Name property of the Innovator item
  - a) Selecting on the Title will open the Item's form
- 3) Snippet – Snippets are only included in the display when a keyword search matches textual content or item properties mapped to content
  - a) The snippet presents the textual content that is relevant to the keyword
  - b) The keyword is highlighted everywhere that it occurs in the snippet
- 4) Change Information – the last user to modify the item and the date that it was last modified are displayed in green directly below the Snippet.
- 5) File Name – this link appears in green below the change information if a related file exists for the item. Only one file that includes content in the search term will appear for items that are related to multiple files.
  - a) Selecting on the File Name will open the file

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## **Functions**

The following functions are available at the bottom of the page.

- 1) Page Size
  - a) The user can control the number of results that are displayed on each results page. The default value is 15.
- 2) Paging
  - a) Next – A next link is presented at the bottom of the page when more results are available beyond the current page size. Selecting this link will display the next page of results.
  - b) Previous – A previous link is presented at the top of the page on all pages other than the first. Selecting this link will display the previous page of results.