Aras Innovator 2023

Release

Configurable InBasket

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Document Conventions

Convention	Description				
Bold	Indicates the names of menu items, dialog boxes, dialog box elements, and commands.				
	Example: Click OK .				
Code	Code examples appear in courier font. It may represent text you type or data you read.				
Yellow highlight	Code highlighted in yellow draws attention to the code that is being indicated in the content.				
Yellow highlight with red text	Red text highlighted in yellow indicates the code parameter that needs to be changed or replaced.				
Italics	Reference to other documents.				
Note:	Notes contain additional useful information.				
Warning	Warnings contain important information. Pay special attention to information highlighted this way.				
Successive menu choices	Successive menu choices appear with a greater than sign (>) between the items that you will select consecutively.				
	Example: Navigate to File> Save> OK.				

The following table highlights the document conventions used in the document:



1 Overview

My InBasket, the destination for Workflow assignments, is now configurable, customizable, and searchable. The new features are:

- Search and filter InBasket: You can search and filter InBasket Items. All the search modes: Simple, Advanced, AML and Hide Search Criteria are now available for InBasket items.
- Saved Search: You can save searches that can be used to retrieve searches that have been created previously.
- Configuration (administrators only): You can add additional source items to the InBasket query, beyond the currently supported items (Workflow Activities Items).
- Customization (administrators only): You can customize the InBasket to add columns to the InBasket display, hide existing columns, re-label columns, and change column widths and order.

Warning Make sure that you do not use any of the InBasket tasks as related source id or data source or data property in the relationship grid.



2 Filtering Tasks/Assignments

2.1 Searching and Filtering Tasks/Assignments

You can now use the search toolbar and the various search modes to search and filter assignments in the InBasket. Using the search toolbar, you can specify different search criteria and filter assignments in the search grid. You can also use these search modes: Hide Search Criteria, Simple Search, Advanced Search, and AML Search to create different search criteria.

M	InBasket									
s	earch 🔇 🛠 Clear	Simple	▼ Current ∨	Today		-	· 🖳 ·			
i	Туре	Source Item	Activity	Start Date	Due Date	Status	Assigned To []	Instructions	Work Item	My Assignme
t	Workflow Ta:					Active				1
	Workflow Task	ECO-00001001	Submit ECO	1/21/2019	1/21/2019	Active	Innovator Admin	Please fill out and submit the ECO	ECO-00001001	
	Workflow Task	ECO-00001002	Submit ECO	1/21/2019	1/21/2019	Active	Innovator Admin	Please fill out and submit the ECO	ECO-00001002	
h	Workflow Task	ECO-00001003	Submit ECO	1/21/2019	1/21/2019	Active	Innovator Admin	Please fill out and submit the ECO	ECO-00001003	

Figure 1.

To perform a simple search, type search terms into the blue search bar. You can use * or % as wildcards.

For example, the term 'a*b' in the Activity column searches for any Item beginning with 'a' and ending with 'b'. You can use * on its own to select non-blank values. For columns with checkboxes, use 0 or 1, where 0 means not-checked.

2.2 Saved Search

The Saved Search enables you to retrieve searches that have been created previously.

Whenever you create a search, the Search Mode and search terms are saved automatically, when a user returns to an item the last search is automatically restored. After you have made a Search, you may save the Search, giving it a name, so that it can be retrieved and re-used, with or without modification, in the future. Each user can execute Saved Searches they have made in addition to searches shared by other users.

2.3 End User Configurability

You can configure the InBasket grid similar to other search grids. The configuration includes rearranging, resizing, and hiding or showing columns in the grid. The changes you make are stored as preferences.



3 Claiming and Unclaiming a Task

You can claim () or unclaim a task if you have the required access rights to the task. When you claim a task, it prevents other users from claiming the task. After you unclaim the task, you or another user may claim the task to submit additional changes to the task.

lcon	Description
F	Claimed by you. Other users are prohibited from claiming the task you have claimed.
	Claimed by others. You cannot claim or complete a task claimed by another user.
Fix	Claimed by Anyone. This icon appears in the grid.

Table 1: Different icons for search criteria and their descriptions.

Claiming a Task

When you claim () a task, other users are prevented from claiming that task. Similarly, you cannot claim a task claimed by another user.

There are multiple ways to claim a task. From the grid, select the task to be claimed, and then opt for one of the following choices:

- Click on the down arrow in the first grid column and select From the context menu.
- Use the right mouse button (right-click) to open the context menu and click Claim Task.

Unclaiming a Task

You can only unclaim a task that is claimed by you. You cannot unclaim a task that is claimed by another user. From the grid, right-click on the task to be unclaimed, and select **Unclaim Task** from the context menu.



4 Completing a Task

4.1 Completing Workflow Activity/Task

When a Workflow Activity becomes active, it is immediately sent to all of the assignees, specified in the **Assignments** tab of the Activity. The identities who receive these activities can then view all of their assigned activities in their InBasket.

To update Workflow Activity

- 1. Log on to Aras Innovator.
- 2. Navigate to My Innovator --> InBasket.
- 3. Select the Activity to be updated from the main grid, right-click and select **Complete Task** from the context menu that pops up.

The Workflow Activity Completion window appears.

		Mandallan Astinita Comunication	
		Workflow Activity Completion	
		Workflow: ECO-00001001 Activity: Submit ECO	
Tasks Sequence	Required	Description	Complete
1		Identify all affected items and specify change actions	
2		Submit the ECO to implementation planning	
Vote	:	Delegate to:	•••
Comments	:		
Authoritoption		E-Signature:	
Authentication Password:			

Figure 2.

- 4. Complete the Activity:
 - a. Select the **Complete** check box for the tasks that you have completed.



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- **Note:** If the **Required** check box is selected for a task, it implies that it is mandatory for you to complete the task. If you try to vote and complete the Workflow Activity without completing the Required Task, an error appears.
 - b. Submit your vote by selecting the appropriate choice from the Vote drop-down. The voting options are dynamically built based on the Workflow Process definition.
 - c. If required, enter your Password and/or E-Signature for authentication. Depending on the configuration by the administrator, you may have to provide either a Password or an E-Signature or both for authentication purposes.

The Workflow Activity Completion provides a location to collect Authentication such as passwords and e-signatures and a location to vote an Exit Path. The result of this vote is then used by the Workflow Process to determine the next set of actions to perform.

- 5. Click one of the following:
 - **Complete**: Checks the activity (to make sure that all required tasks have been checked, variables entered, etc.), marks the activity as complete, and continues the Workflow.
 - Save Changes: Saves all information entered on the form, but does not process the activity.

This is a useful option for activities having a long list of tasks, where an assignee wishes to keep track of what has been completed. Also, if the activity is assigned to a group, then different members of the group may work on different tasks. Once a task is completed, marked as complete, and saved, all members of that group see this information on their Worksheets, thereby reducing duplication of effort.

• **Cancel**: Closes the form without saving any of the changes made to it since it was opened or last saved.

Before the Activity moves to the next state, the Activity needs to be unlocked.



5 Configuring InBasket

5.1 Viewing Others' Assignments/Tasks

Users can now easily view tasks that are not assigned to them directly. Users can search for tasks in other users' **InBasket**.

By default, only members of the *Administrators* group have the permissions necessary to see others' tasks.

Viewing Others' Assignments

- 1. Log on to Aras Innovator with administrative privileges.
- 2. Select **My Innovator** --> **My InBasket** in the TOC. Click the magnifying glass icon to access the Search grid.
- 3. Clicking the My Inbasket icon in the TOC causes the following menu to appear:





By default, the search grid displays tasks assigned to you with 'Active' status.

Se	earch 🐼 Clea	Simple	✓ Current ✓	Today		=	C ~ 🗳 <	~		
i.	Туре	Source Item	Activity	Start Date	Due Date	Status	Assigned To []	Instructions	Work Item	My Assignme
	Workflow Ta:					Active				1
	Workflow Task	ECO-00001001	Submit ECO	1/21/2019	1/21/2019	Active	Innovator Admin	Please fill out and submit the ECO	ECO-00001001	
1	Workflow Task	ECO-00001002	Submit ECO	1/21/2019	1/21/2019	Active	Innovator Admin	Please fill out and submit the ECO	ECO-00001002	
	Workflow Task	ECO-00001003	Submit ECO	1/21/2019	1/21/2019	Active	Innovator Admin	Please fill out and submit the ECO	ECO-00001003	



^{4.} Click in the grid to filter the search criteria. A menu similar to the following appears:

My InBasket	~								
						a I 💷 📔 🔹			
Search 🗙 Clea	ar Simple	✓ Current ∨	Today		= [8		×		
і Туре	Source Item	Activity	Start Date	Due Date	Status	Assigned To []	Instructions	Work Item	My Assignme.
Workflow Ta:					Active		•		1
Clear Criteria k	ECO-00001001	Submit ECO	1/21/2019	1/21/2019	Active	Innovator Admin	Please fill out and submit the ECO	ECO-00001001	
Claimed By Me k	ECO-00001002	Submit ECO	1/21/2019	1/21/2019	Active	Innovator Admin	Please fill out and submit the ECO	ECO-00001002	
Claimed By Others	ECO-00001003	Submit ECO	1/21/2019	1/21/2019	Active	Innovator Admin	Please fill out and submit the ECO	ECO-00001003	



- Clear Criteria erases any search criteria that you entered.
- Claimed by Me displays a list of the tasks that you have claimed.
- Claimed by Others displays a list of tasks that have been claimed by other users.
- Claimed by Anyone displays tasks claimed by you along with tasks claimed by other people.
- 5. Click to view the search results. The InBasket search grid now displays all the tasks.



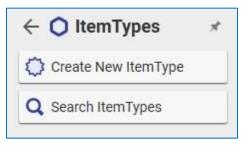
5.2 Creating InBasket Task ItemType

By default, the configurable InBasket supports Workflow Tasks. However, you can now create and add new Task/Activity ItemTypes to the InBasket Task.

Let us consider an example of creating a Meeting Task ItemType and adding it to the InBasket Task Item. Creating InBasket Task ItemType involves four main procedures. The procedures are described in the following sections.

5.2.1 Creating an ItemType

- 1. Log on to Aras Innovator with administrative privileges.
- 2. Select Administration > ItemTypes. The following menu appears:





3. Select Create New ItemType. The ItemType window appears.

ttemType 1 ×															
♦ Save ✓ D ♦ ItemType	one Delete														
Name Singular Label Show Parameters Tab When Populate Control Class Structure	History Template	Discipl Autom Revisio	atic ns		earch Page Size ecords		Dep	ock On Lo, eendent elationshi orce Disco Src Acces w Private	p very IS		plementatio Single Ite Poly Item Federate	em i d Item	al		
 ^ Properties R Properties √ Q 		Views Server			Workfl	ows T	OC Acce	ess TC	C View	Client	Events	Can Add	I Permi	ssions Report	s
Name †	Label	Data Type	Data Source []	Le Pr.	. Sc	Req	Uni	Inde	Hid	Hid	Align	Width	Sort	Keyed Name	. (

Figure 7.





. In the Properties tab, click the New

Enter Meeting in the Name field and click

Property icon and add the **Meeting** ItemType properties as defined in Table 3.

Table 2: The Meeting ItemType properties

Property Name	Label	Data Type	Data Source	Length
assigned_to	Assigned To	item	Identity	
container	Source Item	item	Document	
container_type_id	Container Type	item	ItemType	
due_date	Due Date	date		
instructions	Instructions	string		1024
item	Work Item	item	Part	
item_type_id	Item Type	item	ItemType	
my_assignment	My Assignment	boolean		
name	Activity	string		128
start_date	Start Date	date		
status	Status	String		64
icon	lcon	Image		
language_code_filter	Language Code Filter	String		3

- 5. In the **TOC Access** tab, add users (Identities), who should be able to see the ItemType in the TOC Pane so that they can select the Item.
- 6. In the **Can Add** tab, add users (Identities), who can add a new Item of this type to the database.
- 7. In the **Permissions** tab, add users (Identities) to indicate the access rights to the ItemType.
- 8. Click the **Save** and **Done** buttons to save and unlock.



Edit

to add a new related Item. The Select Items ItemTypes

to

5.2.2 Configure InBasket Task ItemType (Meeting Task ItemType)

6

- 1. Log on to Aras Innovator with administrative privileges.
- 2. Navigate to Administration --> ItemType.
- From the grid, search for InBasket Task Item, double-click on it and then click open the Item for editing.
- 4. In the **Poly Sources** tab, click search dialog box appears.

		300	li chi ulan	Jy DUX a	рреа	13.												
Sele	ct Item	IS																×
0	ltem1	Types ~																
Q	€	Simple	~															
			Singular Label	Plural Label	Versio	Depen	Relatio	c.	Use Src	Description	Help Url	Help Item []	History Tem	Allow Privat	MaxRecords			
< P	rev N	lext > Pa	ge: 1 •••• [1]	25 👤														
																ОК	Cancel	

Figure 8.

5. Enter **Meeting** in the Name field to search for the Meeting ItemType. In our example, we create a Meeting Task Item as a related Item with the following properties on the **Properties** tab

Table 3: The Meeting ItemType properties

Property Name	Label	Data Type	Data Source	Length
assigned_to	Assigned To	Item	Identity	
container	Source Item	Item	NULL (or any value)	
container_type_id	Source Item	Item	ItemType	
due_date	Due Date	Date		
instructions	Instructions	String		1024

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Property Name	Label	Data Type	Data Source	Length
item	Work Item	Item	NULL (or any value)	
item_type_id	Item Type	Item	ItemType	
my_assignment	My Assignment	Boolean		
name	Activity	String		128
start_date	Start Date	Date		
status	Status	String		64
icon	lcon	Image		
language_code_filter	Language Code Filter	String		3

6. Add the following forms to the **Views** tab.

Table 4:The Views tab forms

Form Name	Туре	Description
Meeting Task	Default	Form to be displayed to the user for actions such as View, Edit, and so on related to the Meeting ItemType.
Meeting Task Complete	Complete	An empty form/or a placeholder used when the Meeting Task is Complete.

- 7. In the **TOC Access** tab, add users (Identities), who should be able to see the ItemType in the TOC Pane so that they can select the Item.
- 8. In the **Can Add** tab, add users (Identities), who can add a new Item of this type to the database.
- 9. In the **Permissions** tab, add users (Identities) to indicate the access rights to the ItemType.
- 10. Click Class Structure. Add a node for Meeting Task.
- 11. Click Save and Done to save and unlock the ItemType.

5.2.3 SQL Table and View Execution

- 1. Log on to Aras Innovator with administrative privileges.
- 2. Navigate to Administration --> SQLs.
- 3. Create a SQL View to drop the Meeting table:
 - a. Click File --> New or use the right mouse button (right-click) and select New SQL from the context menu.



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b. The SQL window appears. Configure the following properties:

```
Name = Meeting_Task_Step1_Drop
Type = Table
Execution Flag = Manual
SQL:
IF EXISTS (SELECT * FROM sys.tables WHERE object_id =
OBJECT_ID(N'[innovator].[Meeting_Task]'))
DROP TABLE [Meeting_Task]
IF EXISTS (SELECT * FROM sys.views WHERE object_id =
OBJECT_ID(N'[innovator].[Meeting_Task]'))
DROP VIEW [Meeting_Task]
```

- c. Click Save and click Unlock to save and unlock the SQL Item.
- d. Navigate to Actions --> SQL Execute in the SQL window.
- e. Verify and ensure that table [innovator].[Meeting Task] is dropped from your database.
- 4. Create a temporary view for Meeting Task ItemType
 - a. Navigate to Administration --> SQLs.
 - b. Click File --> New or use the right mouse button (right-click) and select New SQL from the context menu.
 - c. The SQL window appears. Configure the following properties:

```
Name = <u>Meeting_Task</u>_Step02_Create_Tmp_View
Type = View
Execution Flag = Manual
```

SQL:

```
CREATE VIEW [Meeting Task Step02 Create Tmp View]
AS
  SELECT STUFF (MEETING TASK.id, 13, 1, '0') AS ID,
         MEETING TASK.ASSIGNED TO     AS ASSIGNED TO,
         MEETING TASK.ITEM
                                   AS ITEM,
         MEETING TASK.Item TYPE ID AS ITEM TYPE ID,
         MEETING TASK.START DATE
                                   AS START DATE,
         MEETING TASK.Due DATE
                                   AS DUE DATE,
         MEETING TASK.INSTRUCTIONS AS INSTRUCTIONS,
         11
                               AS MY ASSIGNMENT,
         MEETING TASK.NAME,
         MEETING TASK.CONTAINER AS CONTAINER,
         MEETING TASK.CONTAINER TYPE ID AS CONTAINER TYPE ID,
         MEETING TASK.STATUS
                                      AS STATUS,
MEETING TASK.Agenda AS AGENDA,
```

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it.open icon AS ICON, MEETING TASK.CLASSIFICATION, <mark>MEETING TASK</mark>.KEYED NAME, MEETING_TASK.CREATED_ON, <mark>MEETING TASK</mark>.CREATED BY ID, MEETING_TASK.OWNED_BY_ID, MEETING TASK.MANAGED BY ID, MEETING TASK.MODIFIED ON, MEETING TASK.MODIFIED BY ID, MEETING TASK.CURRENT STATE, MEETING TASK<mark>.</mark>STATE, MEETING TASK.LOCKED BY ID, MEETING_TASK.IS_CURRENT, MEETING TASK<mark>.</mark>MAJOR REV, MEETING TASK.MINOR REV, MEETING TASK.IS RELEASED, MEETING TASK.NOT LOCKABLE, MEETING TASK.CSS, MEETING TASK.GENERATION, MEETING TASK.NEW VERSION, MEETING TASK.CONFIG ID, MEETING TASK.PERMISSION ID, <mark>MEETING TASK</mark>.TEAM ID, lang.code

AS language_code_filter

FROM innovator.Meeting AS MEETING TASK

INNER JOIN innovator.ITEMTYPE AS it on it.name = N'Meeting Task'

LEFT OUTER JOIN innovator.LANGUAGE AS lang

ON lang.ID is NOT NULL

- d. Click **Save** and **Done** to save and unlock the SQL Item.
- e. Navigate to Actions --> SQL Execute in the SQL window.
- f. Make sure that temporary View with name **Meeting_Task_Step02_Create_Tmp_View** is created in your database.
- 5. Rename view for Meeting Item Type.
 - a. Navigate to Administration --> SQLs.
 - b. Click File --> New or use the right mouse button (right-click) and select New SQL from the context menu.



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c. The SQL window appears. Configure the following properties:

```
Name = Meeting_Task_Step03_Rename_View
Type = Table
Execution Flag = Manual
SQL:
sp_rename 'Meeting_Task_Step02_Create_Tmp_View', 'Meeting_Task'
```

- d. Click Save and Done to save and unlock the SQL Item.
- e. Navigate to Actions --> SQL Execute in the SQL window.
- f. Make sure that temporary view Meeting_Task_Step02_Create_Temp_View is renamed to Meeting.

5.2.4 Viewing New InBasket Task ItemType

- 1. Log on to Aras Innovator with administrative privileges.
- 2. Click **Meetings** in the TOC. In our example, we created a Meeting ItemType. The following menu appears:

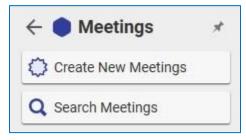


Figure 9.

- 3. Click **Create New Meeting** to create an instance of Meeting ItemType.
- 4. Provide the required information for the Meeting ItemType:
 - **Container**: Document
 - Name: Meeting Task
 - Start Date: Today
 - Due Date: Today+1
 - o Status: Active
 - Assigned to: Administrators
 - o Instructions: Activity Instructions 1
 - Item: Doc_1 (create if necessary)
- 5. Click Save, Done and Close.
- 6. Navigate to My Innovator --> InBasket.
- 7. Execute search.



The Meeting Task appears in the InBasket.

	Туре	Source Item	Activity	Start Date [Due Date [Status	Assigned To []	Instructions	Work Item	My Assignment
•	· · · · · · · · · · · · · · · · · · ·	•••					•••		•••	
	Workflow Task	PR-100001	Verify PR			Pending	Owner	Please verify the Problem Report	PR-100001	
	Workflow Task	PR-100001	Approve PR			Pending	Change Specialist I	Please approve the Problem Report	PR-100001	
	Workflow Task	ECO-00001001	Change Review			Pending	Change Control Board	Review changes made by the ECO	ECO-00001001	
	Workflow Task	DCO-00001001	Final Review			Pending	Change Control Board	Review document changes	DCO-00001001	
	Workflow Task	ECO-00001002	Change Review			Pending	Change Control Board	Review changes made by the ECO	ECO-00001002	
	Workflow Task	DCO-00001002	Final Review			Pending	Change Control Board	Review document changes	DCO-00001002	
	Workflow Task	ECO-00001001	Submit ECO	10/15/2014	10/15/2014	Active	Innovator Admin	Please fill out and submit the ECO	ECO-00001001	~
	Workflow Task	ECO-00001002	Submit ECO	10/15/2014	10/15/2014	Active	Innovator Admin	Please fill out and submit the ECO	ECO-00001002	~
	Workflow Task	DCO-00001001	Planning	10/15/2014	10/15/2014	Active	Innovator Admin	Perform DCO Planning	DCO-00001001	~
	Workflow Task	PR-100001	Review PR	10/15/2014	10/15/2014	Active	Change Specialist I	Please Review the Problem Report	PR-100001	
	Workflow Task	DCO-00001002	Planning	10/15/2014	10/15/2014	Active	Change Control Board	Perform DCO Planning	DCO-00001002	
_	Monting Tack	Dec 1	Activity Tort 1	10/15/2014	10/17/2014	Donding	CDB	Activity Instructions 2	Dec 1	
	Meeting Task	Doc 1	Activity 1	10/16/2014	10/22/2014	Active	Administrators	Activity Instructions 1	Doc 1	~

Figure 10.

5.3 Adding a New Column to the InBasket

The InBasket Task is a Poly Source Item. To add a new column or a new property to any of the Poly Source Items, you need to add the column or the property to all the other Poly Source Items as well as to the InBasket Task Item.

Adding a new column to the InBasket involves five main procedures, which are described in the following sections.

Let us consider the example of adding a column named Agenda to the newly created Meeting ItemType.

Note: If you add a column or a property to any of the Poly Source Items, ensure that it is added to other Poly Source Items and the InBasket Task Item. Else, an error is displayed.

5.3.1 Adding a new column to the New InBasket ItemType

- 1. Log on to Aras Innovator with administrative privileges.
- 2. Navigate to Administration --> ItemTypes.
- 3. Search for the newly created InBasket ItemType in the search grid. Select the Item and open for editing.



In our example, we have created the **Meeting** ItemType. Let us open the **Meeting** ItemType for editing. The Item window appears.

Meeting >	-																
	una 🛸																
Edit		1.															
	£ (<u>*</u> <u>*</u> ~	 ~ .	•••													
^ Item1	Туре																
Name		History Template	Versioning		Searc	:h				ck On Log	rout	-Im	plementatior	Type			
Meeting Singular La	shel	Default Plural Label	Version Discipli	ne		uto Searc efault Pag			Dep	endent elationship		(Single Iter Poly Item 				
Meetings	ameters Tab		Automa Revisio v Default	provide a second s	Ma	ax Recor	rds	1	M Enfo	rce Disco Src Acces	very) Federated				
When Pop	and the second se	Tabs Off								w Private I		ns ^{Er}	able for Se	cure Soci	al		
Class St	structure	Small Icon	Large Icon														
																	_
Prope	erties R	elationshipTypes	Views Server	Events Actions	_ife Cycl	les V	√orkflo	ws TO	OC Acce	ss TO	C View	Client E	Events C	an Add	Permiss	ions Reports	F
🔳 Prope	erties 🗸	☆															
5		Hidden	~ O	· 🖳 · 🗟 · ·													
Name 🕇		Label	Data Type	Data Source []	Le	Pr	Sc	Req	Uni	Inde	Hid	Hid	Align	Width	Sort	Keyed Name	
assigned_	_to	Assigned To	ltem	<u>Identity</u>									Left		3072		
classifica	ation	Classification	String		512								Left		128		
config_id			Item	Meeting				~					Left		2688		
4.	Click	🖍 Edit	to unloc	k the ItemT	vne												
6.	relation		•	ck 5 to	o crea	ate									d in the		
6.	relatio Provi colun	onship grid de the requ	uired infor		o crea	ate											
6.	relation Provi colum	onship grid de the requ nn.	uired infor <mark>nda</mark>		o crea	ate											
6.	relation Provi colun o N o L	onship grid de the requ nn. lame : <mark>age</mark>	uired infor <mark>nda</mark> nda		o crea	ate											
6.	relation Provi colun o N o L	onship grid de the requ nn. lame : <mark>age</mark> .abel : Ager	uired infor <mark>nda</mark> nda Text		o crea	ate											

- 1. Log on to Aras Innovator with administrative privileges.
- 2. Navigate to Administration --> ItemTypes.
- 3. From the grid, search for InBasket Task Item and open the Item for editing.



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4. Click the Poly Sources tab.

The Poly Source Items appear.

O InBasket Task x
O InBasket Task ☆ ■
Save Vone S Discard & C X V III V V III V V III V V V V V V V V
^ ItemType
Name History Template InBasket Task Implementation Type Singular Label Plural Label InBasket My InBasket Show Parameters Tab Default Structure View Tabs Off Implementation Type Ctarss Structure Select an image
Properties RelationshipTypes Views Server Events Actions Life Cycles Workflows TOC Access TOC View Client Events Can Add Permissions Reports Poly Sources Poly Sources
O ItemTypes ∽ ☆
Name † Description []
Workflow Task
Project Task
Meeting Task

Figure 12.

You need to edit and add the property to each of the Poly Source Items. Start with the **Workflow Task** Item.

5. Right-click on the **Workflow Task**, click **Open**. The Workflow Task Item window appears.

🖍 Edit 😏	° *~ 🖬	 ∼ <														
Name Workflow Task Singular Label Workflow Task Show Parameters Ta When Populatec Class Structure	History Template Plural Label Workflow Tasks Default Structure View Tabs Off	Discip Autor Revisi	nable		rch uto Searc lefault Paj lax Recor	ge Size	Dep	ock On Log endent elationshi orce Disco : Src Acces w Private	p very SS		plementation Single Iter Poly Item Federated	m I Item	al			
		Views Serve		Life Cy	cles V	Vorkflows 1	OC Acce	ess TC	IC View	Client	Events	Can Add	l Permis	isions Reports	s Poly Se	our
Properties Properties	RelationshipTypes ú			Life Cy	cles V Pr	Vorkflows 7 Sc Req	OC Acce	ess TC	C View	Client Hid	Events Align	Can Add	Permis	ksions Report:	S Poly St	our
Properties	RelationshipTypes	~ I 🖲	<u>~</u> <u>∎</u> ~		1 1		1		1	1	1	1		P	1	
Properties Properties ~ Name †	RelationshipTypes	✓ ↓ ● Data Type	<u>~</u> <u>∎</u> ~		1 1	Sc Req	Uni	Inde	Hid	Hid	Align	1	Sort	P	1	

Figure 13.

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- Click Edit to unlock the Workflow Task Item for editing.
- 7. In the **Properties** tab, click to create a new property.

A blank row is added in the relationship grid.

- 8. Provide the required information for the property. Here we add the details for Agenda column.
 - o Name: agenda
 - Label: Agenda
 - o Data Type: Text
- 9. Click Save, Unlock and Close on the Workflow Task Item window.
- 10. Repeat step 5 to step 9 for Meeting Task.
- 11. Close the InBasket Task Item window.

Note: If adding a property of type Item, the behavior of this property must be set to *Fixed* on **InBasket** Task and all of its **Poly Sources**.

5.3.3 Rebuilding SQL Views

5.3.3.1 Rebuilding SQL View for New InBasket ItemType

- 1. Log on to Aras Innovator with administrative privileges.
- 2. Navigate to **Administration --> SQLs**.
- 3. Search for the Drop SQL View that we created for the new ItemType.

In our example, we created <code>Meeting_Task_Step1_Drop SQL View</code>. For more information, refer to section 5.2.3 SQL Table and View Execution.

- 4. Select Meeting_Task_Step1_Drop in the search grid, right-click and select SQL Execute from the context menu.
- 5. Search for the Create Temp SQL View that we created for the new ItemType.

In our example, we created <code>Meeting_Task_Step02_Create_Temp_view</code>. For more information, refer to section 5.2.3 SQL Table and View Execution.

6. Select Meeting_Task_Step02_Create_Temp_view in the search grid, right-click and select Edit from the context menu.

The SQL Meeting_Task_Step02_Create_Temp_view window is displayed.



7. Add the following line to the SQL field.

MEETING TASK.Agenda AS AGENDA

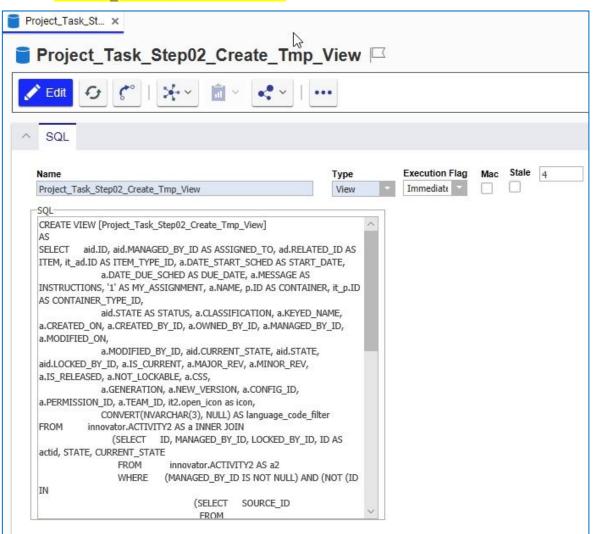


Figure 14.



to save and unlock the SQL Item.

- 9. Click Actions --> SQL Execute in the SQL window and then close the SQL window.
- 10. Search for the Rename SQL View that we created for the new ItemType.

In our example, we created Meeting_Task_Step03_Rename_View. For more information, refer to section 5.2.3 SQL Table and View Execution.

11. Select Meeting_Task_Step03_Rename_View in the search grid, use right mouse button (right-click) and select SQL Execute from the context menu.

5.3.3.2 Rebuilding SQL View for Other Poly Source Items

1. Log on to Aras Innovator with administrative privileges.

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- 2. Navigate to Administration --> SQLs.
- 3. Rebuild SQL view for Workflow Item Task.
 - a. From the search grid, search Workflow_Task_Step01_Drop.
 - b. Select Workflow_Task_Step01_Drop in the search grid, right-click and select SQL Execute from the context menu.
 - c. From the search grid, open Workflow_Task_Step02_Create_Tmp_View.
 - Edit Click d. to edit the Workflow Task Step02 Create Tmp View. e. In SQL field, add the following line: CONVERT (NVARCHAR (128), NULL) AS AGENDA, Workflow_Task... × 2 Workflow_Task_Step02_Create_Tmp_View 💻 (Save 🛞 Discard ***** * / Done £ ** al ... SQL

Name		Туре	Execution Flag	Mac	State	1	_
Workflow_Task_Step02_Create_Tmp_V	iew	View	Timmediate				
SQL			7				
CREATE VIEW [Workflow Task Step02	Create Tmp View]	~					
AS							
SELECT act_asgn.ID,							
act_asgn.RELATED_ID	AS ASSIGNE	D_TO,					
wfl.SOURCE_ID	AS ITEM,						
wfl.SOURCE_TYPE	AS ITEM_TYP	E_ID,					
act.ACTIVE_DATE	AS START_DA	TE,					
Dateadd(day, Isnull(act.EXPECTE	D_DURATION, 0), act.ACTIVE_DA	TE) AS					
DUE DATE,							
COALESCE(CASE WHEN lang.COE	E='en' THEN act.MESSAGE END,						
act.MESSAGE) AS INSTRUCTIONS,							
'1'	AS MY_ASSIGNMENT,						
COALESCE(CASE WHEN lang.COE	E='en' THEN act.label END, act.la	abel,					
act.NAME) AS NAME,							
wfl_proc.ID	AS CONTAINER,						
it.ID	AS CONTAINER_TYP	E_ID,					
STATUS =		204-024					
CASE							
WHEN act_asgn.CLOSED_0	N IS NULL THEN act.STATE						
ELSE 'Closed'							
END,							
act.CLASSIFICATION,							
act.KEYED_NAME,							
act ason.CREATED ON.		~					

Figure 15.



to save and unlock the SQL Item.

- g. Click SQL Execute from the Actions menu.
- h. Close the window.



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- i. From the search grid, search Workflow Task Step03 Rename View.
- j. Select Workflow_Task_Step03_Rename_View in the search grid, use the right mouse button (right-click) and select SQL Execute from the context menu.

5.3.4 Adding the column to the InBasket Task Item

- 1. Log on to Aras Innovator with administrative privileges.
- 2. Navigate to Administration --> ItemType.
- 3. From the grid, search for Workflow Task Item and click
- 4. Save, unlock, and close the Workflow Task Item.
- 5. Repeat steps 3 and 4 for the Meeting Task Item.

Note: InBasket Task won't let you edit and save the Item Type until after you've saved, unlocked, and closed the Poly Items connected to it.

6. From the grid, search for InBasket Task Item and click



🧪 Edit



7. In the Properties tab, click to create a new property.

A blank row is added in the relationship grid.



- 8. Provide the required information for the property. In our example, we add the details for Agenda column.
 - Name: agenda
 - o Label: Agenda
 - o Data Type: Text

O InBasket Task ☆ ■														
🕑 Save 🗸 Dor	ne 😢 Discard	9 (°	** 💼 *	~ ~										
/ ItemType														
		Versioning												
InBasket Task Singular Label InBasket Show Parameters Tab When Populate: T Class Structure	History Template Plural Label My InBasket Default Structure View Tabs Off Small Icon Select an image	Version Discipl Autom Revisio	nable ine atic nns t	Search Auto Searc Default Pag 25 Max Recon	e Size			ident ationship ce Discove rc Access	ery	0	ementation Single Ite Poly Item Federate ble for Se	em 1	ı	
 Properties Reli 		views Server	Events Actions	Life Cycles W		100	; Access	100	view 0		ents C	an Add		
Properties V V	Hidden	v @ .	· 🖳 · 🔍											
	Hidden			Length	Pr	Sc	Reg	Uni	Inde	Hid	Hid	Align	Width	Sort
		V O	✓ 🕎 ✓ 💽 ✓	Length	Pr	Sc	Req	Uni	Inde	Hid	Hid	Align	Width	Sort 2048
Name †	Hidden	Data Type		0.75	Pr	Sc							Width	
Name †	Hidden	Data Type	Data Source []	0.75	Pr	Sc	U		U		M	Len	Width	2048
Name † minor_lev modified_by_id modified_on	Hidden	Data Type Sumg Item	Data Source []	0.75	Pr	Sc						Left	Width	2048
Name † Q Mame † Q modified_by_id modified_on my_assignment	Label	Data Type Sunng Item Date	Data Source []	0.75		Sc						Left Left	Width	2048 1280 1152
Name † Q Mame † Q modified_by_id modified_on my_assignment	Hidden Label My Assignment	Data Type Suring Item Date Boolean	Data Source []			Sc						Left Left Center		2048 1280 1152 1152
Name † Q	Hidden Label My Assignment	Data Type Suring Item Date Boolean String	Data Source []			Sc						Lent Left Left Center Left		2048 1280 1152 1152 384
Name † Q	Label My Assignment Activity	Data Type String Item Date Boolean String Boolean	Data Source []			Sc						Lent Left Left Center Left Left Left		2048 1280 1152 1152 384 2688
Name † Minior_rev modified_by_id modified_on my_assignment name new_version not_lockable	Label My Assignment Activity	Data Type Suring Item Date Boolean String Boolean Boolean	Data Source [] User			Sc						Left Left Center Left Left Left Left		2048 1280 1152 1152 384 2688 2304
Name † mmor_rev modified_on modified_on name name new_version not_lockable owned_by.jd permission_jd	Label My Assignment Activity	Data Type Suring Item Date Boolean String Boolean Boolean Item	Data Source [] User User Identity			Sc						Left Left Center Left Left Left Left Left		2048 1280 1152 1152 384 2688 2304 896
Name † mmor_rev modified_on modified_on name name new_version not_lockable owned_by.jd permission_jd	Label My Assignment Activity Not Lockable	Data Type Suring Item Date Boolean String Boolean Item Item	Data Source [] User User Identity			Sc						Lent Left Left Center Left Left Left Left Left Left	-160	2048 1280 1152 1152 384 2688 2304 896 2944
Name † Immor_rev modified_on modified_on modified_on name new_version not_lockable owmed_by_id permission_id start_date state	Label My Assignment Activity Not Lockable	Data Type Suring Item Date Boolean String Boolean Boolean Item Item Date	Data Source [] User User Identity			Sc						Left Left Center Left Left Left Left Left Left Left	-160	2048 1280 1152 1152 384 2688 2304 896 2944 512
Name † minor_rev modified_opi_d modified_on my_assignment name new_version not_lockable owned_by_id permission_id start_date state status	Label My Assignment Activity Not Lockable Start Date	Data Type Suring Item Date Boolean String Boolean Item Item Item String	Data Source [] User User Identity			Sc						Left Left Center Left Left Left Left Left Left Left Left	160	2048 1280 1152 1152 2688 2304 896 2944 512 1536

Figure 16.

9. Click Save, Unlock and Close in the InBasket Task Item window.

5.3.5 Viewing the New Column in Configurable InBasket

- 1. Log on to Aras Innovator with administrative privileges.
- 2. Navigate to **My Innovator** --> **My InBasket**.



The InBasket search grid displays the newly added column. In our example, we can now see the newly added column **Agenda** [...].

	Type	Source Item	Activity	Start Date [Due Date [Status	Assigned To []	Instructions	Work Item	My Assignment	Agenda []
•											
	Workflow Task	19.100001	Verify IR			Pending	Queen	Please werity the Problem Report	PR: 100005		
	Workflow Task	FR-20003	Approve PR			Pending .	Charlos Seeclebra 2	Please approve the Problem Report	EB-10001		
	Workflow Task	ECD-0000500EL	Change Review			Pending	Charlos Caritral Based	Review changes made by the ECO	ECD-00003301		
	Workflow Task	000-20021001	Final Review			Pending	Charson Control Board	Review document changes	000-00001001		
	Walkflow Task	BCD-OPOCADE2	Change Review			Pending	Change Control Board	Review changes made by the ECO	000-00003202		
	Workflow Task	000-0001002	Final Review			Pynding	Change Cartox Buerl	Ravies document changes	DCD-00010002		
	Workflow Task	800-00064.081	Subevit ECD	10/15/2014	10/15/2014	Active	Innesitar, Admin	Please fill out and submit the ECO	202-20203303	12	
	Workflow Task	102-00012012	Submit ECO	10/15/2004	10/15/2014	Active	Instantion Administ	Please fill out and submit the ECO	800-00003007	12	
	Workflow Task	DCD-00001001	Planning	10/15/2014	10/15/2014	Active	Insuitor Athen	Perform DCO Plenning	DCD-00001012	R	
	Workflow Task	19.20000	Review PR	10/15/2014	10/15/2014	Active	Change Speciality, J	Please Review the Problem Report	Ph-social		
	Workflow Task	000-00001002	Ranning	10/15/2014	10/15/2014	Active	Changes Construit Brand	Perform DCO Planning	202-00003282		
	Meeting Task	Doc.1	Activity Test 1	10/15/2014	10/17/2014	Pending	CRB	Activity Instructions 2	Doc.3		
	Meeting Task	Doc.1	Advity 1	10/16/2014	10/22/2014	Adlve	Strictistop .	Activity Instructions 1	Dos.1	2	

Figure 17.



5.4 Creating an Import Package to add a Column

When creating an import package that adds a column to the Configurable InBasket you must ensure that the order in which the property is added to the PolyItems is correct or the import will fail.

In the example below there are steps on how to create a package that will add a column that shows the Part_Number of an InBasket task.

- 1. From the source database, use the Export tool to export the Workflow_Task and InBasket_Task ItemTypes, and their corresponding SQL queries
 - The Workflow_Task and InBasket_Task ItemTypes, and SQL queries are located in the com.aras.innovator.inbasket package definitions

Export	_		×
Export Settings Exit About			
Innovator Server			-
Server: http://mharney01/support/110SP15-7113/ Username: root			
Database: 110SP15-7113 Password: ********			
	Lo	gin	
Export Options			
Export To: C:\Temp	Level:	1 🗄	I
Export Referenced Items:			
References to Unknown Packages: C Remove Silently C Remove with Warning © Don	't Remov	re	
Available for Export			
Packages: Items:			
Image: Commarastring of the story Image: Commarastring of the story Image: Commarastring of the story			
□ com.aras.innovator.inbasket			
🗖 Action			
□ Form ☑ ItemType			
- Method			
A com aras innovator license			
completed			

Figure 18.

2. From the InBasket_Task.xml you will need to remove the following lines (typically located near the end of the file):



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	C7977377FFF40D59FF14205914E9C71" action="edit">
<relationships></relationships>	
<iten action="add" id="</td><td>9657383E16C64B86ABD6E17CDD20AE23" type="Morphan"></iten>	
<related_id keyed_name*"<br=""><sort_order>128<td>Workflow Task" type="ItemType" name="Workflow Task">321BD822949149C597FD596B1212B85Cder></td></sort_order></related_id>	Workflow Task" type="ItemType" name="Workflow Task">321BD822949149C597FD596B1212B85Cder>
<source_id keyed_name="I
</Item></td><td>nBasket Task" name="InBasket Task" type="ItenType">BC7977377FFF40D59FF14205914E9C71</source_id>	
<item action="edit" id="B</td><td>C7977377FFF40D59FF14205914E9C71" type="ItemType"></item>	
<relationships></relationships>	
«Item type="Morphae" id="	DE32C0E3C356403A096D36443CB0A200" action="add">
<pre></pre>	aBasket Task" type="ItemType" name="InBasket Task">BC7977377FFF40D59FF14205914E9C71
(/Item)	

Figure 19.

Note: It is recommended you copy and paste the above lines for future use in the upcoming steps.

3. From the InBasket_Task.xml you will need to remove the new column property (shown below) to avoid errors during the import.





- 4. In the new import package folder, create an ... /Imports/Fixes folder
- 5. Inside the fixes folder you will add the xml files shown below:
 - Workflow_Task.xml
 - InBasket_Task.xml

a. 1 Workflow_Task.xml will look something like the following:

```
<AML>
<Item type="ItemType" id="321BD822949149C597FD596B1212B85C"</pre>
action="edit">
  <Relationships>
   <Item type="Property" id="EB9B7F4B06064C378EF5CEC3E94FB58E"</pre>
action="add">
    <column alignment>left</column alignment>
    <data type>string</data type>
    <is hidden>0</is hidden>
    <is hidden2>0</is hidden2>
    <is indexed>0</is indexed>
    <is keyed>0</is keyed>
    <is multi valued>0</is multi valued>
    <is required>0</is required>
    <label xml:lang="en">test</label>
    <range inclusive>0</range inclusive>
    <readonly>0</readonly>
    <sort order>4608</sort order>
```

```
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```



```
<source id keyed name="Workflow Task" type="ItemType"</pre>
name="Workflow Task">321BD822949149C597FD596B1212B85C</source id>
   <stored length>32</stored length>
   <track history>0</track history>
   <name>test</name>
  </Item>
 </Relationships>
 </Item>
<Item type="ItemType" id="BC7977377FFF40D59FF14205914E9C71"</pre>
action="edit">
 <Relationships>
   <Item type="Morphae" id="9657383E16C64B86AB06E17CDD20AE23"</pre>
action="add">
    <related id keyed name="Workflow Task" type="ItemType"
name="Workflow Task">321BD822949149C597FD596B1212B85C</related id>
    <sort order>128</sort order>
    <source id keyed name="InBasket Task" type="ItemType"</pre>
name="InBasket Task">BC7977377FFF40D59FF14205914E9C71</source id>
  </Item>
 </Relationships>
</Item>
 </AML>
```

The code highlighted in yellow is taken from the exported Workflow_Task.xml where the information is that of the property that will be used for the new column. The code highlighted in green is taken from the deleted lines of the InBasket_Task.xml.

b. 3 Inbasket_task.xml will only include code to add the new column property as shown below:

```
<AML>
<Item type="ItemType" id="BC7977377FFF40D59FF14205914E9C71"</pre>
action="edit">
  <Relationships>
   <Item type="Property" id="6DCBE94B46044404B74F15A613A02811"</pre>
action="add">
    <column alignment>left</column alignment>
    <data type>string</data type>
    <is hidden>0</is hidden>
    <is hidden2>0</is hidden2>
    <is indexed>0</is indexed>
    <is keyed>0</is keyed>
    <is multi valued>0</is multi valued>
    <is required>0</is required>
    <label xml:lang="en">test</label>
    <range inclusive>0</range inclusive>
    <readonly>0</readonly>
    <sort order>1024</sort order>
    <source id keyed name="InBasket Task" type="ItemType"
name="InBasket Task">BC7977377FFF40D59FF14205914E9C71</source id>
    <stored length>1024</stored length>
    <track history>0</track history>
    <name>test</name>
```

```
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```



```
</Item>
</Relationships>
</Item>
</AML>
```

Note: You will need to generate a new ID for the added property. To do this you can go through the following steps:

- a. From a browser, go to http://localhost/innovator/client/scripts/nash.aspx
- b. Fill in Login information for the appropriate target database
- c. Under Action select generateNewGUID
- d. Click on Submit
- e. Copy the newly generated ID and add that to the 3 Inbasket_Task.xml file in the highlighted area above
 - 6. To ensure that the fixes folder is imported with the import tool, you will need to add the path as follows:

```
<package name="com.aras.innovator.solution.InBasketFix"
path="InBasketFix\Import">
        <dependson name="com.aras.innovator.inbasket" />
        </package>
```

5.5 Managing Language Preferences

It is possible to set up the Configurable InBasket to handle multiple languages so that it selects the values appropriate to the client environment.

The following sample shows how to adjust the InBasket to handle the German locale:

- 1. Edit the Workflow_Task_Step02_Create_Tmp_View SQL item.
 - a. Open the Workflow Task Step02 Create Tmp View SQL item for editing.
 - b. Change the query for Instructions column:

```
From:
COALESCE(CASE WHEN lang.CODE='en' THEN act.MESSAGE END, act.MESSAGE) AS
INSTRUCTIONS,
```

```
To:
COALESCE(CASE WHEN lang.CODE='en' THEN act.MESSAGE
WHEN lang.CODE='de' THEN act.MESSAGE_DE END,
act.MESSAGE) AS INSTRUCTIONS,
```

c. Change the query for Activity column:

```
From:
COALESCE(CASE WHEN lang.CODE='en' THEN act.label END, act.label, act.NAME) AS
NAME,
To:
COMMENT AND A CODE to the THEN of LADED
```

```
COALESCE(CASE WHEN lang.CODE='en' THEN act.LABEL
WHEN lang.CODE='de' THEN act.LABEL_DE END,
```



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act.LABEL, act.NAME) AS NAME,

- d. Save, unlock, and close the $\texttt{Workflow}_\texttt{Task}_\texttt{Step02}_\texttt{Create}_\texttt{Tmp}_\texttt{View}$ SQL item.
- 2. Rebuild SQL view for Workflow Item Task.
 - a. From the search grid, search for Workflow Task Step% SQL items.
 - b. Right-click on Workflow_Task_Step01_Drop in the search grid and select SQL Execute from the context menu.
 - c. Right-click on Workflow_Task_Step02_Create_Tmp_View in the search grid and select SQL Execute from the context menu.
 - d. Right-click on Workflow_Task_Step03_Rename_View in the search grid and select SQL Execute from the context menu.

