TEAMCENTER

Content Management on Rich Client — Usage

Teamcenter 2412

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1. What is Content Management?

Content Management is a component content management system for the creation of technical documentation. Technical publications consist of XML and SGML text components, which are stored in the Teamcenter database along with any referenced graphics used in the publications. The structure and content of a publication is validated by schemas, such as DITA or Docbook. The publication layout is implemented with stylesheets, which allows the same content to be formatted for different media, such as print, web, or interactive applications. Content developed as individual topics may be reused by reference in multiple publications.

Content Management works in conjunction with several publishing and editing tools, which enable publications to be generated for both online and print formats. Content Management includes support for multiple language versions and includes the ability to manage topics through translations and release cycles.

Three types of Content Management solutions are available:

- Base Content Management, which can be used with traditional and custom DTDs and schemas such as DocBook and Structured Product Labeling (SPL).
- S1000D Content Management, which enables management of documentation for either issue 2.2/2.3, 4.0, 4.1, 4.2, or 5.0 of the S1000D standard.
- DITA Content Management, which enables management of documentation for the DITA standard, through version 1.3, including specialization and support for DITA Open Toolkit (OT) version 2.4.6.

> Note:
>
> Editing tools are supported only on Windows clients. S1000D issue 2.3 is supported only on Linux and Windows. DITA publishing is supported only on Linux and Windows.

Separate from the Content Management solution, the document management functionality in Teamcenter enables you to manage documents created by other software applications, such as Microsoft Word, Microsoft Excel, and other programs.

Before Content Management can be used for authoring publications, the application administrator must complete several tasks to prepare Content Management for authors.

Pre-configured administration data is included in the *TC_ROOT***contmgmtbase_data\data**, *TC_ROOT***contmgmts1000d_data\data**, *TC_ROOT***contmgmts1000d40_data\data**, and *TC_ROOT***contmgmtdita_data\data** folders.

Two types of users access Content Management:

- Content Management administrators create and manage objects that enable content authoring.

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- Content authors use Content Management to create and manage technical documentation.

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2. Steps administrators must perform before you can use Content Management

- Set the appropriate access privileges to define the data objects that users can access in the application.
- Install Content Management.
- Prepare Content Management for authors.

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3. Using Teamcenter XMetaL Client to manage content

Teamcenter XMetaL Client is an optional application that integrates XMetaL Author with Content Management for authoring and managing technical publications. Authors log in to Teamcenter using the XMetaL interface and can perform most authoring tasks and the workflow signoff task, without using the Teamcenter interface.

To install XMetaL Client, download and unzip*TC_INSTALL_DIR\additional_applications\xmetal_install.zip*. Open the *xmetal_install*folder and run *setup.exe*.

For configuration instructions, see the *Teamcenter XMetaL Client Administrator's Guide* located on the local drive where XMetaL Client is installed, for example: *c*:**\Program Files (x86)\Siemens\Teamcenter10\XMetaLPlugin\XMetal\CRCL\adapters \Teamcenter\docs**. For instructions on using Teamcenter XMetaL Client, see the *Teamcenter XMetaL Client Help* available from the **Help** menu in Teamcenter XMetaL Client.

If you are using Teamcenter XMetaL Client, do not install the XMetaL plugin in the Teamcenter interface.

> Note:
>
> Once installed, this plugin requires the user to associate the XMetaL application to the *aw___* file that is downloaded to the browser. A browser update may be needed. After that, the file should automatically launch into XMetaL without requiring the user to double click the *aw___*.

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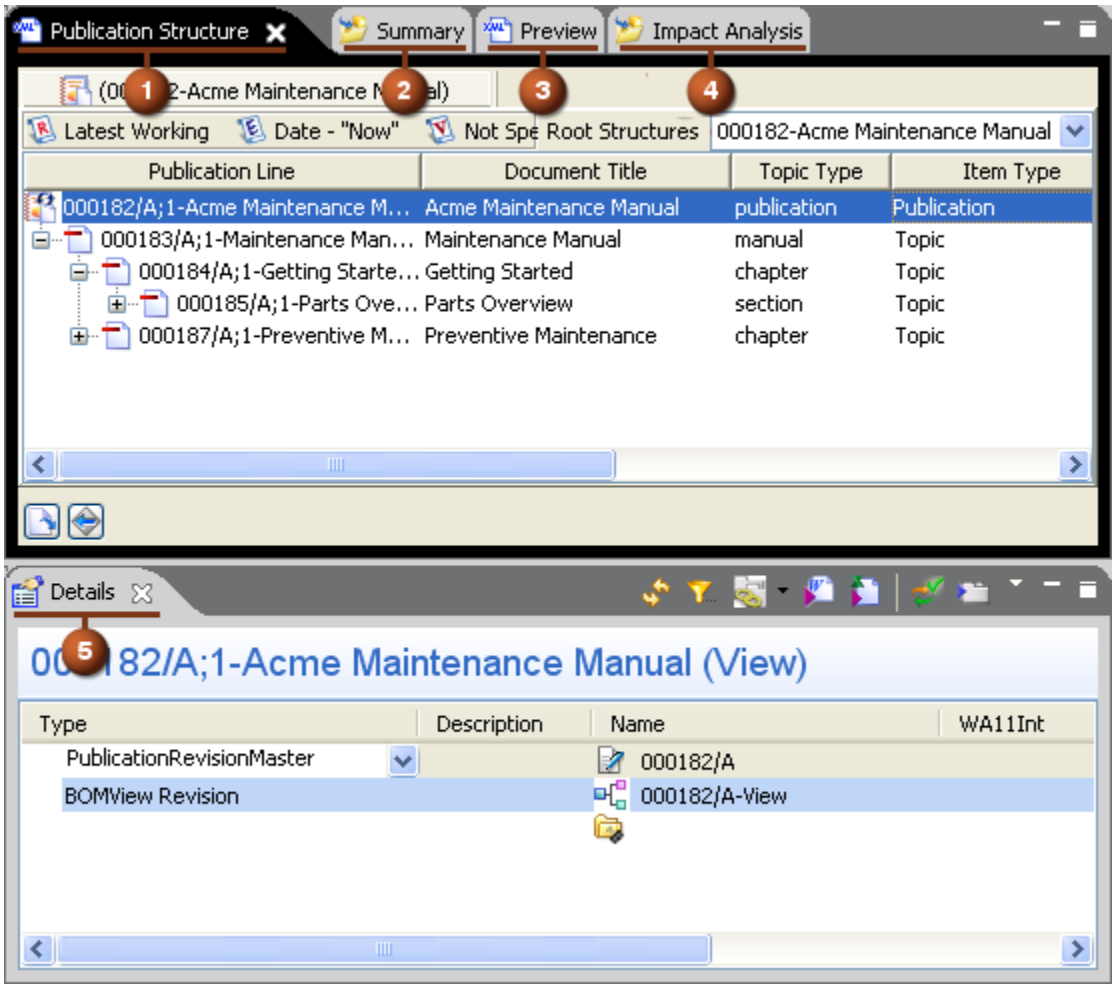
4. Content Management interface

Content Management views



1	**Publication Structure** view	Enables you to navigate, create, and maintain the structure of a publication with XML or SGML components, by adding, relating, removing, and moving topics. The state of the **Publication Structure** view may be set to persist between logins using the **ctm0RestoreStateOfPubStructure** preference.
2	**Summary** view	Displays the property information of the selected object. The **Summary** view is also used with other Teamcenter solutions.

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3	**Preview** view	Used to display either published content (**Publish Content**) or the XML or SGML markup of a publication (**Show Content**).
4	**Impact Analysis** view	Provides graphical where-used and where-referenced search capabilities for topics, graphics, and administrative objects. The **Impact Analysis** view is also used with other Teamcenter solutions.
5	**Details** view	When a component is selected in the **Home** component view or the **Publication Structure** view, displays the objects at the level below the selected object, which may be system objects used to support the selected object. The **Details** view is also used with other Teamcenter solutions.

Content Management icons

Icon	Description
	Comparing tool
	Composed document
	Composed document revision
	DITA Base
	DITA Concept
	DITA Dynamic Map
	DITA Reference
	DITA Static Map
	DITA Task
	DITA Topic
	Editing tool
	Graphic

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Icon	Description
	Graphic attribute mapping
	Graphic revision
	Graphic option
	Graphic option revision
	Graphic priority list
	Graphic translation
	Graphic translation revision
	Language item
	Procedure
	Publication
	Publication revision
	Publication type
	Publishing tool
	Reference topic type
	Reviewer document
	Reviewer document revision
	Schema
	Schema revision
	Style type
	Stylesheet
	Stylesheet revision

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Icon	Description
	Topic
	Topic type
	Transformation policy
	Translation
	Translation revision
	Translation delivery
	Translation delivery revision
	Translation office
	Translation office revision
	Translation order
	Translation order revision
	Viewing tool
	XML attribute mapping
	XML schema
	XML schema revision

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5. Basic concepts for using Content Management

Understanding the following basic concepts will help you use the features of Content Management.

Data objects are unique in Content Management

Items and item revisions are the fundamental data objects used to manage information in Teamcenter. Content Management uses specific types of items and item revisions, including topics, topic revisions, publications, and publication revisions in Base Content Management, and S1000D and DITA items in those solutions. Content Management also uses administration objects for defining the authoring environment, such as topic types, XML attribute mappings, and schemas.

Some administration objects—stylesheets, schemas, procedures, and translation offices—have item revisions. Content Management objects are managed like other Teamcenter objects.

You perform some tasks with these objects in the **Home** component view; however you use the **Publication Structure** view to create and maintain the contents of publications.

Topics are the basic component of publications

In Base Content Management, a topic is a component that may be part of one or more publications. A topic may contain text, tables, graphics, and subtopics. The term *topic* is also used in Content Management to refer to certain S1000D and DITA objects.

Content versions track edits to a topic

In addition to the revision ID and sequence ID appended to topics, each topic revision has a content version. The content version is a number that increases each time the content of the topic is edited. When a topic is first created, its content version is -1. After the content is edited once, the content version increases to 0, and then to 1, and so on. The content version of a topic revision is displayed in the **Summary** view. When a topic has a translation, you can compare the content version of the topic to the content version of the translation to determine if the topic has changed since the topic was translated. When you edit the content of a topic, you can save it without increasing the content version, which is useful when a topic has a related translated topic and you want the versions of the two to remain synchronized.

Publications are the complete structure and content of technical documents

In Base Content Management, a publication object holds all the contents of a traditional XML publication. A publication contains topics and subtopics, such as the cover page, back page, header, footer, and sections or chapters. DITA and S1000D Content Management solutions have unique publication-type objects that are used to create technical documentation.

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The type of topics you can add to specific locations in a publication is defined by the Content Management administrator in an underlying hierarchical structure of publication types and topic types created according to the schemas your company uses.

Schemas define the building blocks of XML and SGML documents

Schemas define the basic structure of elements and attributes used in structured documents. When you relate publication and topic types to schemas in Content Management, the XML or SGML content is validated against the schema files that are defined by the Content Management administrator. A DTD is an example of a schema type.

Stylesheets control the format of documents

A *stylesheet* contains formatting information used to render, edit, or transform a topic or document. A *style type* is used to organize and manage the stylesheets associated with publications. These objects are defined by the Content Management administrator.

A graphic item may have several graphic options

A *graphic* item is the main object representing a set of different file types, or *graphic options*, for the same illustration. For example, a graphic item may be named *piston*, and it may have several associated graphic options named piston.jpg, piston.gif, and piston.bmp, which all represent the same illustration in different formats.

When you start an editing or publishing process, the Content Management system selects the applicable graphic option from the graphic, based on how the graphic options are defined by your application administrator. For example, during the publishing process, the graphic option selected may be a high-resolution .eps file registered with the **PDF** usage in the topic; and if the graphic item has a .png file registered with the **VIEW** usage, Content Management may display it in the topic for editing.

Integration with third-party tools enable you to author content

Content Management integrates tools, which are installed on each client, to support the following authoring tasks:

- **Publishing**

  Publishing tools render content to PDF, HTML, XHTML, and other proprietary formats, based on the stylesheets and applications you have available.

- **Editing**

  Editing tools are used to author and edit XML and SGML content and are launched when topics are opened for editing.

- **Comparing**

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Comparing tools are used to compare differences in topics.

- **Viewing**

  Viewing tools are used to run an external tool to view topics. This is useful when a quick or remote preview session is needed, without the processing time required to generate a PDF document or other process-intensive stylesheet.

> Note:
>
> Cortona3D Teamcenter Integration is a third-party tool that provides the capability to author publications that are linked with assembly and part data in Teamcenter. The Cortona3D tool utilizes Content Management software but provides its own interface.

Composed documents assemble documents for reviewing

A composed document is created when you publish content. It contains a publication or topic with all its child topics collected in one file. A reviewer document is the same type of document, named differently so that it can be used to distinguish documents between those that have been processed through the review process (composed documents) and those that have not (reviewer documents). These documents can be exported and imported for content review outside of the system.

Workflows can aid in document review

You can design Teamcenter workflow process templates that incorporate your company's business practices and procedures. Your company can use these workflows to process topics through release cycles and between participants.

You can use Teamcenter workflows for document reviews by using Workflow Designer and Workflow Viewer.

You can manage content in different languages

Content Management manages multiple language versions of topics and publications, for example: English, Russian, and Simplified Chinese.

Several object types are used for translations:

- **Translations**

  A translation is an object created with the content of a topic in a different language than the original. Translations indicate the language and topic for which they are created. A translation is related to the source topic from which it is derived.

- **Translation orders**

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A translation order is an object in the translation process used to provide information to the translator. It contains basic information, such as the translation office assigned and the requested delivery date.

- **Translation deliveries**

  A translation delivery contains the translation topics and has an associated .zip file that can be exported and sent to the translation company.

- **Graphic translations**

  Graphic translations are objects that are created when graphic options are imported. They store the language property associated with a graphic option when it is imported. Graphic translations are related to the original (master language) graphic items and to the graphic options with the associated translation languages.

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6. Search for Content Management objects

You can use system defined searches to search in Teamcenter for existing content, graphics, and administration objects.

1. Choose **Advanced** from the quick **Search** menu at the top of the navigation pane.

2. On the **Search** pane toolbar, click to select a search type.

3. Click **More** to display the system defined searches.

4. Under **System Defined Searches**, select the object you want to search for.

   Content Management objects are listed with the **Content Management** prefix.

5. Click **OK**.

   The dialog box that contains the object properties appears.

6. Type the values for the object properties that you want to search for.

7. Click to search.

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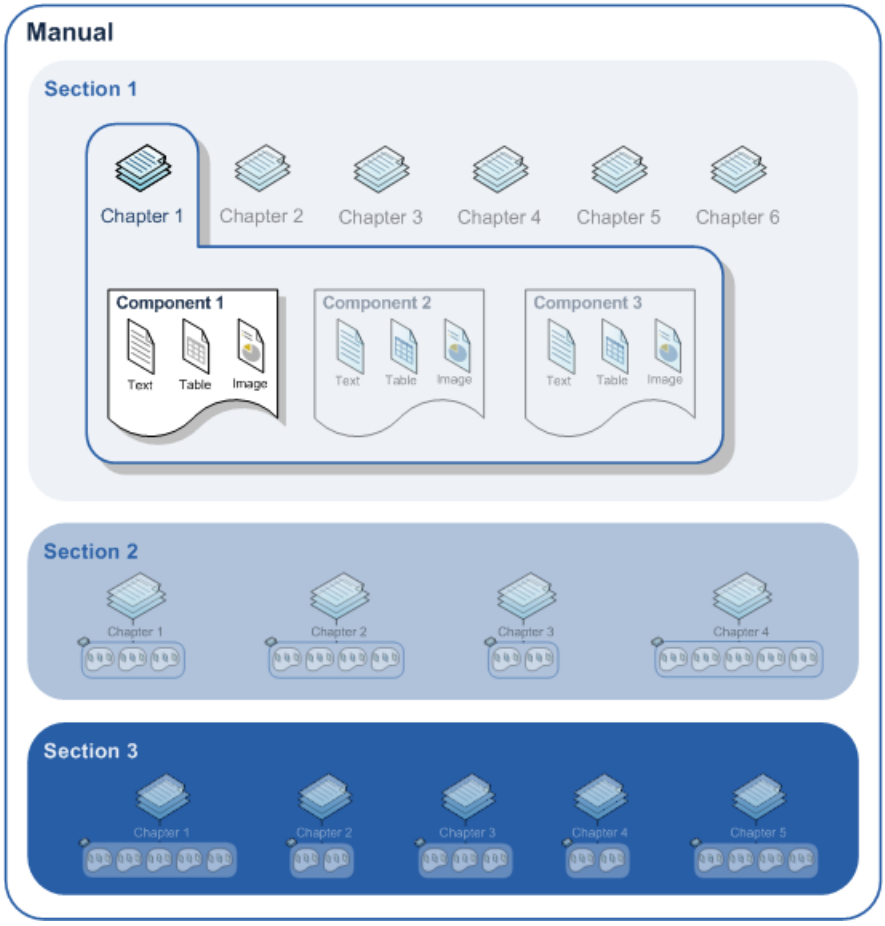
7. Creating Base Content Management content

Overview of Base Content Management content

The Base Content Management solution is used to work with traditional XML or SGML topics and publications. You can create topic and publication objects directly in Content Management, and you can create topics in an editing tool.

A publication is the root level topic in a document structure and contains topics and subtopics. Depending on the topic types available in your schema and defined by your application administrator, the publication you create may contain such topics as a cover page, back page, header, footer, and manual contents, which may consist of several subtopics such as sections or chapters. You may also create standard topics, such as legal notices or warranty statements, which can be reused in all your publications.

Here is an example of a publication structure:



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Create a topic or template in Base Content Management

> Note:
>
> You can also create a new topic by adding the valid XML elements in another topic that is open in an editing tool. When you save and check in edited content, new topics are created in Content Management with the appropriate relationships to the publication structure you are working in.

1. Select either a folder, publication, or topic in which you want to create the new topic, and then either click **New Author Item...** , or choose **File→New→New Author Item**.

   > Note:
   >
   > You can select a folder in the **Home** component view or a publication or topic in either the **Home** component view or the **Publication Structure** view.

2. In the **New Author Item** dialog box, expand **Complete List**, click **Topic**, and then click **Next**.

3. Enter the following:

In this box	Do this
Select Topic Type	Select the topic type to associate with the new topic. The topic type determines which schema is used to validate the topic and which stylesheets are used when a tool is launched to edit or publish the topic. If you are creating a topic in an existing publication from the **Publication Structure** view, the list of topic types is limited to the topic types that are valid for the associated schema. Note: • The topic type may already be selected, or the options may be limited to a specific topic type group, depending on how the **ctm0TopicTypeGroup** preference is set. • If no options are listed, your administrator must create topic types.
ID	Either type an ID for the topic, or leave the box blank so that the next available item ID is automatically assigned.
Revision	Either type a revision number for the topic, or leave the box blank so that the next available revision is automatically assigned.
Name	Type the item name for the topic.
Document Title	Type the document title of the topic.

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In this box	Do this
Master Language Reference	Select the master language of the topic.
Is this a template	Select whether this topic will be used as a topic template: **True** = This topic is a topic template. **False** = This topic is not a topic template.
Reference only	Store a value to indicate whether this topic should be copied or referenced when it is referenced by another topic that is used as template. **True** = This topic should be a reference to its original when it is referenced by another topic that is used as template. **False** = This topic should be copied when it is referenced by another topic that is used as template. Example: You are creating topic A which will be used in publication F. Publication F is used as a template to create publication G. If this option is set to **True** for topic A, publication G should contain topic A as a reference. If this option is set to **False** for topic A, publication G should contain topic B, which is copy of topic A. Note: Use this only to store a value; the system does not read this value during the creation of content from a template topic.

4. Click **Finish**.

   The dialog box clears so you can create another topic.

5. When you are done creating topics, close the dialog box.

Create a publication or template in Base Content Management

1. Select a folder in the **Home** component view in which you want to create the new publication, and then either click **New Author Item...** , or choose **File→New→New Author Item**.

2. In the **New Author Item** dialog box, expand **Complete List**, click **Publication**, and then click **Next**.

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3. Enter the following:

In this box	Do this
Select Publication Type	Select the type of publication, from the list of those defined in your system. Note: If no options are listed, your administrator must create publication types.
ID	Either type an ID for the topic, or leave the box blank so that the next available item ID is automatically assigned.
Revision	Either type a revision number for the topic, or leave the box blank so that the next available revision is automatically assigned.
Name	Type the item name for the topic.
Document Title	Type the title of the publication.
Master Language Reference	Select the publication's master language.
Is this a template	Select whether this topic will be used as a publication template: **True** = This topic is a publication template. **False** = This topic is not a publication template.

4. Click **Finish**.

   The dialog box clears so you can create another publication.

5. When you are done creating publications, close the dialog box.

Create a new topic based on an existing topic revision

1. Select the topic revision from which you want to create the new topic, and then choose **File→Save As→Item(Revision)**.

2. In the **Save Topic Revision As** dialog box, enter the following:

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For this option	Do this
Name	Type the name for the new topic revision.
Document Title	Type the document title of the topic revision.
Is this a template	Select whether this topic will be used as a topic template: **True** = This topic is a topic template. **False** = This topic is not a topic template.
Reference only	Store a value to indicate whether this topic should be copied or referenced when it is referenced by another topic that is used as template. **True** = This topic should be a reference to its original when it is referenced by another topic that is used as template. **False** = This topic should be copied when it is referenced by another topic that is used as template. Example: You are creating topic A which will be used in publication F. Publication F is used as a template to create publication G. If this option is set to **True** for topic A, publication G should contain topic A as a reference. If this option is set to **False** for topic A, publication G should contain topic B, which is copy of topic A. Note: Use this only to store a value; the system does not read this value during the creation of content from a template topic.

3. Click **Next**.

4. For the **Define Attached Objects** step, click **Next** to accept the selected values.

   Caution:

   Do not modify the **Copy Option**.

5. For the **Related Objects information** step, enter the properties for the new dataset and topic:

   a. Expand the dataset and the topic information.

   b. Type the **Name** for the new dataset and new topic.

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> Tip:
>
> This is the topic item level, not the topic revision.

c. (Optional) Type a **Description** for the new dataset and new topic.

d. (Optional) Type an ID or click **Assign** to create an ID for the topic.

e. Click **Next**.

6. (Optional) For the **Assign Project Page** step, assign the topic revision to one or more projects.

7. Click **Finish**.

Create a new publication based on an existing publication revision

When you create a new publication using the **Save As** option, you create a new publication and publication revision with references to the same topics as in the original publication.

1. Select the publication revision from which you want to create the new publication, and then choose **File→Save As→Item(Revision)**.

2. In the **Save Publication Revision As** dialog box, enter the following:

For this option	Do this
Name	Type the name for the new publication revision.
Document Title	Type the document title of the publication revision.
Is this a template	Select whether this topic will be used as a publication template: **True** = This topic is a publication template. **False** = This topic is not a publication template.

3. Click **Next**.

4. For the **Define Attached Objects** step, click **Next** to accept the selected values.

5. For the **Related Objects information** step, enter the properties for the new publication:

   a. Expand the publication information.

   b. Type the **Name** for the new publication.

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> Tip:
>
> This is the publication item level, not the publication revision.

c. (Optional) Type a **Description** for the new publication.

d. (Optional) Type an ID or click **Assign** to create an ID for the publication.

e. Click **Next**.

6. (Optional) For the **Assign Project Page** step, assign the publication revision to one or more projects.

7. Click **Finish**.

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8. Creating DITA content

Overview of DITA content

DITA (Darwin Information Typing Architecture) is an XML-based architecture for developing technical publications. It includes an architectural specification, language specification, and DTD and schema implementations of the language. If you have installed the DITA Content Management solution, you can manage documentation for the DITA architecture. The DITA solution also includes Base Content Management features. The way you relate, create, and edit content differs between the Content Management solutions; however you can use the **Publication Structure** view to organize DITA content. For more information about DITA, see **OASIS Standards**.

Content Management supports these objects through DITA version 1.3:

> Note:
>
> DITA publishing is supported only on Linux and Windows.
>
> The contents of **anchorref** elements are not included in documents published with DITA Open Toolkit 2.4.6 publishing tools.

- **DITA maps**

  A DITA map is an object that contains references to DITA topics and organizes the topics into hierarchies, tables, or groups. Maps can also be used to produce outlines or tables of contents. A map can contain any combination of references to DITA topics, DITA tasks, DITA concepts, DITA references, and other DITA maps. A DITA map includes metadata to describe properties such as audience, platform, and product. Maps are used to create documents that result in separate XML files in output processing. The `<map>` element is used in the XML to define a map. You can import existing DITA maps to the Content Management application, which includes any references to DITA topics they may contain. You can work with two types of maps:

  - **DITA Dynamic Map**

    You can add, delete, and organize topics in a DITA dynamic map in Content Management and edit contents in an editing tool. A DITA bookmap is a special type of dynamic map, used to organize DITA content into a book format. The `<bookmap>` element is used in the XML to define a bookmap.

  - **DITA Static Map**

    You can edit topic references in a DITA static map in an editing tool but not in Content Management. In version 9.0 and later, static maps are primarily used only for content migrated from earlier versions.

- **DITA Base**

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A DITA base object, also referred to as a DITA composite object, is a top-level container for multiple topics used to create documents that result in one XML file in output processing. A DITA base object can contain any combination of DITA topics, DITA tasks, DITA concepts, and DITA references. A DITA base object can be opened for editing XML content. The content opens in the editing tool as one XML file containing all its related files. The `<dita>` element is used in the XML to define a DITA base object.

- **DITA topics**

  A DITA topic is one unit of content that contains the information for a single subject. The DITA architecture includes the following four topic types:

  - **DITA Topic**

    A DITA topic, also referred to as a *generic* or *unspecialized* topic type, provides the base for specialized topic types and does not meet the definition of a concept, reference, or task topic.

  - **DITA Concept Topic**

    A DITA concept topic is a specialized topic type that provides background information to aid in the understanding of a product, interface, or task.

  - **DITA Reference Topic**

    A DITA reference topic is a specialized topic type that provides quick access to facts.

  - **DITA Task Topic**

    A DITA task topic is a specialized topic type that provides step-by-step instructions for completing a task.

Create a DITA item

1. Select the location in which you want to create the new DITA item, and then either click **New Author Item...** , or choose **File→New→New Author Item**.

   > Note:
   >
   > You can select a folder in the **Home** component view or a DITA map or topic in either the **Home** component view or **Publication Structure** view.

2. In the **New Author Item** dialog box, expand **Complete List** and click one of the following:

   - **DITA Base**

   - **DITA Concept**

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- **DITA Dynamic Map**

  Note:

  Use this option to create a DITA bookmap.

- **DITA Reference**
- **DITA Static Map**
- **DITA Task**
- **DITA Topic**

3. Click **Next**.

4. In the **New Author Item** dialog box, enter the following:

In this box	Do this
Select Topic Type	Select the topic type to associate with the new object. The topic type determines which schema is used to validate the object and which stylesheets will be used when a tool is launched to edit or publish the content. Note: • The topic type may already be selected, or the options may be limited to a specific topic type group, depending on how the **ctm0TopicTypeGroup** preference is set. • If no options are listed, your administrator must create topic types.
ID	Either type an ID for the object, or leave the box blank so that the next available item ID is automatically assigned.
Revision	Either type a revision number for the object, or leave the box blank so that the next available revision is automatically assigned.
Name	Type the item name for the object.
Document Title	Type the document title of the object.
Master Language Reference	Select the master language of the object.
Is This A Template	Select whether this object will be used as a template:

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In this box	Do this
	True = This object is a template. **False** = This object is not a template.
Reference only	Use this indicator to set whether this object will be copied or referenced when it is referenced by another object that is used as template. **True** = This object will be a reference to its original when it is referenced by another object that is used as template. **False** = This object will be copied when it is referenced by another object that is used as template.
DITA Audience	Select the audience to assign to this object.
DITA Importance	Select the level of importance to assign to this object.
DITA Other Properties	Select other properties to assign to this object.
DITA Platform	Select the platform to assign to this object.
DITA Product	Select the product to assign to this object.
Relation Selection (appears only when you are relating a DITA topic to another topic of the same type from the **Publication Structure** view)	Select the type of relationship to create between the parent and child topics: • **Composable Reference** When a composable reference appears in the editing tool, you see only a reference to the topic. However, when a topic is published with a composable reference to another topic, the published topic includes all the content from the referenced topic. • **Topic to Topic** When a topic-to-topic relation appears in the editing tool, you see all the content from the related topic. Additionally, when a topic is published with a topic-to-topic relation to another topic, the published topic includes all the content from the related topic.
Reference Topic Type (appears only when the value of the **Relation Selection** is **Composable Reference**)	Select the type of reference to create between the two objects: Example: • **Topicset map to topic** Use when defining a topicset element that references a set of topics.

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In this box	Do this
	• **Topicref map to topic** Use when adding topics to maps, using the topicref element. When the map is published, the topics appear in the output. • **Keydef map to topic** Use when adding topics to maps, using the keydef element. By default, when the map is published, the topics do not appear in the output, although you can configure them to appear.
Key Name	Type the value to assign to the **keys** attribute.

5. Click **Finish**.

Create a new DITA item based on an existing one

1. Select the revision of the DITA item from which you want to create the new DITA item, and then choose **File→Save As→Item(Revision)**.

2. In the **Save As** dialog box, enter the following:

For this option	Do this
Name	Type the name for the new DITA item.
DITA Audience	Select the audience to assign to this item.
DITA Importance	Select the level of importance to assign to this item.
DITA Other Properties	Select other properties to assign to this item.
DITA Platform	Select the platform to assign to this item.
DITA Product	Select the product to assign to this item.

3. Click **Next**.

4. For the **Related Objects information** step, enter the properties for the new dataset and item:

   a. Expand the dataset and the item information.

   b. Type the **Name** for the new dataset and new item.

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> Tip:
>
> This is the item level, not the item revision.

c. (Optional) Type a **Description** for the new dataset and new item.

d. (Optional) Type an ID or click **Assign** to create an ID for the item.

5. Click **Finish**.

Working with DITA content references (conrefs)

What are DITA conrefs?

When you have DITA content that must appear in more than one DITA topic or map, you can use DITA conrefs to reuse the content. When you publish, referenced content appears in the elements you create in topics or maps. When you edit content, the modifications are reflected everywhere it is referenced.

You can reference an entire topic or an element from a topic.

When you import a document with a DITA conref, the filename in the conref must be in the format **item_id.dita** for topics and **item_id.ditamap** for maps.

> Example:
>
> `conref="X000001.dita#X000001"`
>
> `conref="X000001.dita#X000001/para1"`
>
> `conref="X000124.ditamap"`
>
> `conref="X000124.ditamap#topic1"`

Add a DITA conref to reference an element

1. **Open** the topic or map that contains the content you want to reuse in another topic or map.

2. In the editing tool, add an ID to the element of the content you want to reference. For example, if you want to reference the text of a paragraph, create an ID in the **id** attribute of the paragraph element.

3. Save the change to the topic or map.

4. **Open** the topic or map in which you want the referenced content to appear.

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5. Add a new element where you want the reference to appear, and leave it empty. For example, if you are referencing the text of a paragraph, create a new paragraph element.

6. In the **Publication Structure** view, right-click the topic or map you want to reference, in which you just created the ID, and choose **Copy for Editor→DITA Content Reference**.

7. In the editing tool, paste the reference in the empty element in the content, and replace the placeholder text with the ID of the element you are referencing. The way you paste the reference depends on the type of tool you are using:

   - In a plain text editor or an XML editor with a plain text view, when you paste the reference, it appears within the element as in this example of a reference to a topic:

     ```
     conref="X000006.dita#X000006/<?replace_with_element_id?>"
     ```

     Or in this example of a reference to a map:

     ```
     conref="X000124.ditamap#<?replace_with_element_id?>"
     ```

     You replace the placeholder text. For example:

     ```
     conref="X000006.dita#X000006/para1"
     ```

     ```
     conref="X000124.ditamap#topic1"
     ```

   - If you are working in an XML editor view showing XML as tags, the reference is pasted as text instead of markup, so you must edit it accordingly. In XMetaL Author, you can paste the reference in the element's **conref** attribute in the **Attribute Inspector**, and edit it to appear as follows:

conref	X000006.dita#X000006/para1

8. Add the attributes to set whether the conref is fixed or floating. For example:

   - In a plain text editor:

     ```
     conref="X000006.dita#X000006/para1" rev="A" base="fixed"
     ```

     ```
     conref="X000006.dita#X000006/para1" rev="CURRENT" base="floating"
     ```

   - In an XML editor:

base	floating
rev	CURRENT

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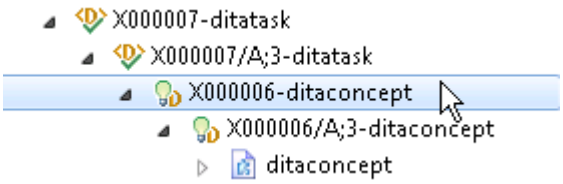
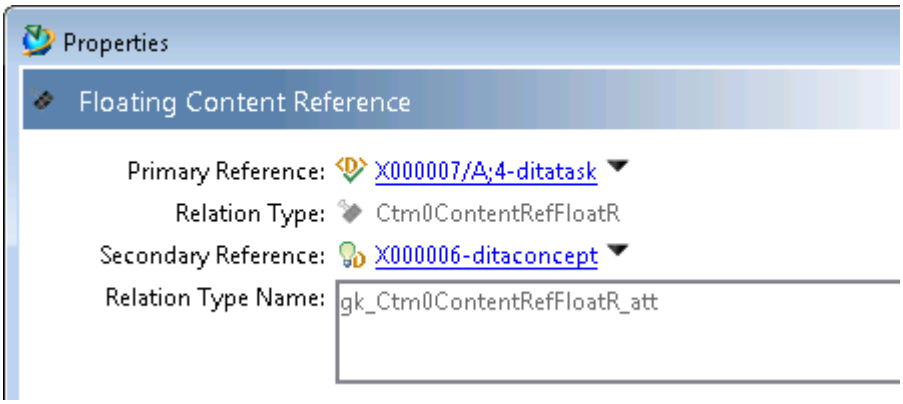
base	fixed
rev	A

9. Save the changes to the topic or map.

10. To view the relationship between the topics, in the **Home** component view, right-click the referenced topic and choose **Properties On Relation**.



The **Properties** dialog box shows the relation type between the topics.



Add a DITA conref to reference another topic

1. In the **Publication Structure** view, right-click the topic you want to reference and choose **Copy for Editor→DITA Content Reference**.

2. Open the topic or map in which you want the referenced content to appear.

3. In the editing tool, paste the reference in the topic element in the content. The way you paste the reference depends on the type of tool you are using:

   - In a plain text editor or an XML editor with a plain text view, when you paste the reference, it appears within the element as in this example:

     ```
     conref="X000001.dita#X000001/<?replace_with_element_id?>"
     ```

     Or in this example of a reference to a map:

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```
conref="X000124.ditamap#<?replace_with_element_id?>"
```

In this case, you remove the placeholder text. For example:

```
conref="X000001.dita#X000001"

conref="X000124.ditamap"
```

- If you are working in an XML editor view showing XML as tags, the reference is pasted as text instead of markup, so you must edit it accordingly. In XMetaL Author, you can paste the reference in the element's **conref** attribute in the **Attribute Inspector**, and edit it to appear as follows:

conref	X000001.dita#X000001

4. Add the attributes to set whether the conref is fixed or floating. For example:

   - In a plain text editor:

```
conref="X000001.dita#X000001" rev="A" base="fixed"

conref="X000124.ditamap" rev="CURRENT" base="floating"
```

   - In an XML editor:

base	floating
rev	CURRENT

base	fixed
rev	A

5. Save the changes to the topic.

Relate DITA topics

If you are using the DITA 1.2 or 1.3 administration data included with Content Management, multiple reference topic types are available for topics and maps. When you relate a DITA 1.2 or 1.3 topic to another topic or map, you must select the reference topic type. You may also use this feature if you are not using the DITA 1.2 or 1.3 administration data but your administrator has defined multiple reference topic types for DITA topics.

1. Relate a topic to another topic or map by dragging it to the other topic or map in the **Publication Structure** view.

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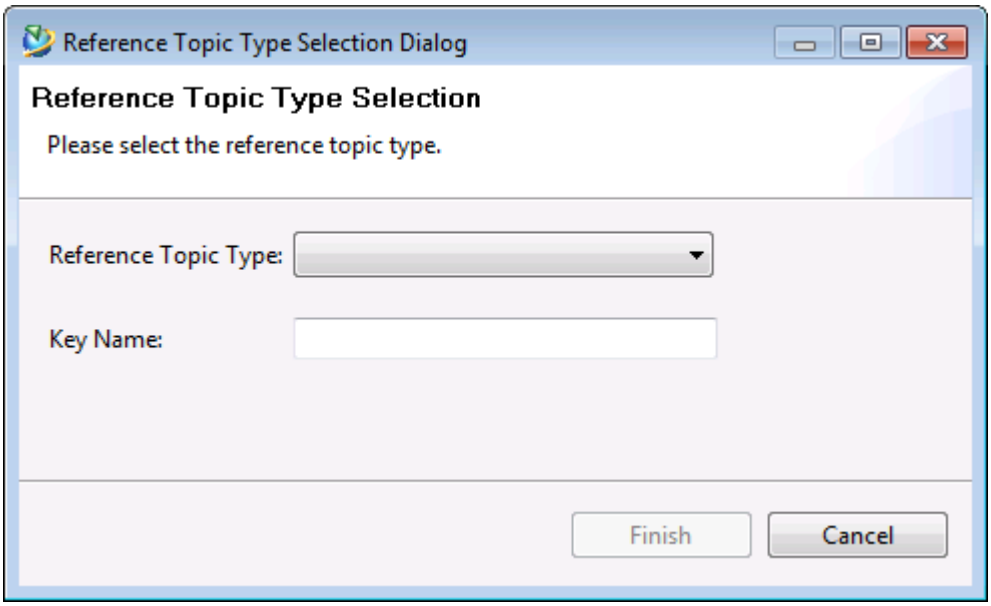
> Note:
>
> If you select a topic item, not a topic *revision*, the most current revision is moved.



2. From the **Reference Topic Type** list, select the type of reference to create between the two objects.

3. In the **Key Name** box, type the value to assign to the **keys** attribute.

4. Click **Finish**.

Add topics to a DITA relationship table

The DITA relationship table (reltable) enables you to manage related topic links in publications using a single map. The relationships defined in the table appear in lists of related topics in the published output. For more information about relationship tables, see **OASIS Standards**.

1. In a DITA dynamic map in an editing tool, use standard DITA elements and attributes to create a relationship table.

2. For each topic you want to add to the table, in the **Publication Structure** view, right-click the topic, and choose **Copy for Editor→Reference To DITA Map**.

3. In the editing tool, paste the reference in the **relcell** element in the relationship table.

   The cell is populated with the tag name from the type of topic you copied the reference from, for example: **topicref**. The **href**, **navtitle**, and **type** attributes are populated in the element.

4. Edit the tag if it is not the correct element.

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5. Add more attributes, if necessary, such as **linking**.

   The output creates related links to topics in the same row, but not the same cell.

Example:

Type = "task"	Type = "concept"
topicref Replacing the Battery /topicref	topicref Types of Batteries /topicref topicref Tools Needed /topicref topicref Expected Battery Life /topicref

The output for the task topic looks like this:

Replacing the Battery

1. Remove the screw from the back of the case, using a small Phillips screwdriver.
2. Remove the existing batteries from the case.
3. Place the new batteries in the case, ensuring that the orientation of positive and negative ends match the diagram in the case.
4. Replace the battery cover.

Related Concepts

Types of Batteries

Tools Needed

Expected Battery Life

The output for one of the concept topics looks like this:

Expected Battery Life

The batteries in your remote control are expected to last about two years. The precise expectancy depends on the amount of use. When the batteries are low, the battery indicator light blinks.

Related Tasks

Replacing the Battery

Working with DITA keyrefs

DITA keyrefs are an indirect addressing mechanism available in DITA 1.2 and 1.3, in which you store symbolic names for topic file paths in one map. When you change a topic's path in this one place, all references to the topic are automatically updated.

To use the **keyref** attribute, you define the **keys** attribute in a map on an element that references another topic or map, such as the **topicref** or **keydef** elements. You can define keys in the same map you use for your deliverable, or you can create and reference a map specifically for defining keys. In the **keys** attribute you define a name for a topic's file and in the **href** attribute you define the file's path.

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Example:

```
<topicref keys="tools" href="tools_needed.dita"/>

   or

   <keydef keys="tools" href="tools_needed.dita"/>
```

To create references to the topic from another topic, you use the **keyref** attribute.

Example:

```
<link keyref="tools"/>
```

In the above example, the link defined by the keyref goes to the **tools_needed.dita** file. If the location of the file changes later, you update the **keys** definition in the map, and all the references in all the topics with the **tools** keyref automatically point to the new file location.

For more information about DITA keyrefs, see the **DITA XML.org** website.

In Content Management, you can define keyrefs in several ways:

- When you **create a new topic** in a selected map, in the **New Author Item** dialog box you define the **Reference Topic Type** and **Key Name**, which is the value of the **keys** attribute.
- When you **relate DITA topics**, you drag the topic for which you want to define the keys to the map in which you want to define it. In the **Reference Topic Type Selection** dialog box, select the **Reference Topic Type** and type the **Key Name**, which is the value of the **keys** attribute.
- When you edit the content in an editing tool, you can add the XML elements and attributes to define keyrefs.

Validate DITA keyrefs

When you **define DITA keyrefs** and create references to them, you can validate the keyrefs to make sure they are set up correctly.

You can also set the **Cdi0KeyrefValidation** preference to **true** so that keyrefs used in topics referenced in maps are always validated during import and when you save changes and close the file in an editing session.

1. Select the map that defines the keys for the keyrefs.
2. Choose **Tools→Reference Validation**.

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The validation finds keyrefs used in the map's topics and verifies that the keys are defined in the map.

A message appears indicating whether the keyrefs are valid.

Create DITA value filter using a Ditaval topic

DITA value filters are used to filter topics in a DITA map when you publish it, based on certain attributes in the topics. For example, you can exclude topics whose audience attribute is advanced or expert, so that the map includes only those topics whose audience is beginner.

Your administrator may create DITA value filters that you can apply to content when you publish it. In Content Management for DITA 1.3, you may also create your own DITA value filters by creating topics with the **Ditaval** topic type.

Create a DITA value filter

1. Create a **DITA Topic**.
   - For the topic type, select **DITA 1.3 Ditaval**.
   - Enter only the required values. Do not select value filters at the bottom of the dialog box.
2. Edit the topic, and define the value filters using the DITA **val** element according to the **OASIS Standards**.
3. Drag the DITA value filter topic to any place in the structure of a map in the **Publication Structure** view.

Apply DITA value filters when publishing

1. Begin the steps to **publish the map**.

   DITA value filters created by your administrator appear in the **DITA Value Filters** list.
2. Choose **Find DITAVALs**.

   The DITA value filter topics that were added to the map appear in the **DITA Value Filter Topics in the Map** list.
3. Select or clear the check boxes for the DITA value filters, from either list, that you want to use to publish the map.

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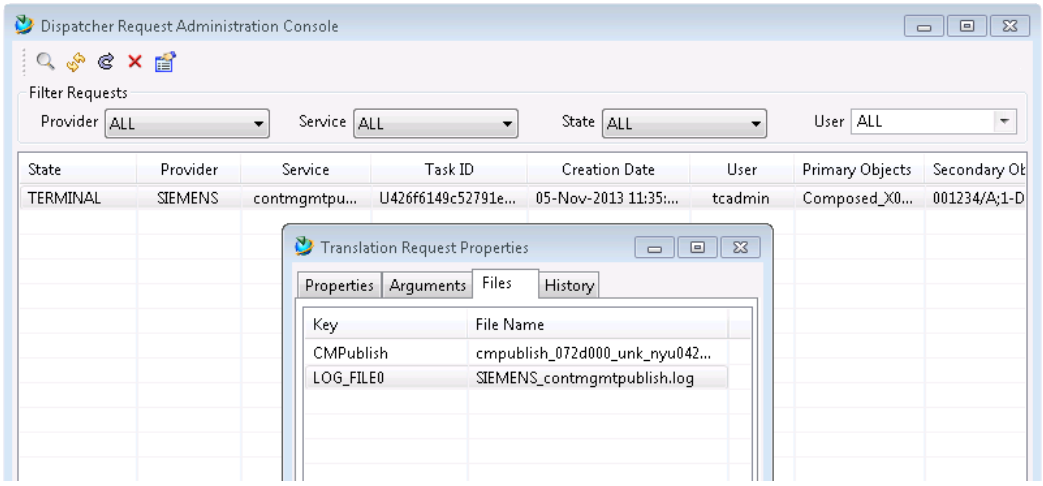
Review broken links in DITA OT output

When you publish content, a log file is created. If you publish with a DITA Open Toolkit (OT) tool, you can review the log file for any errors with broken references or links between topics.

1. After you publish content, choose **Translation→Administration Console**.

2. In the **Dispatcher Request Administration Console**, select the line containing the publish request and click .

3. In the **Translation Request Properties** dialog box, click the **Files** tab.



4. Select the log file and click **Export**.

5. In the **Save As** dialog box, select the location to save the log file.

6. Open the log file with a text editor, and search for the errors that provide the information about the broken links.

```
conref:
   [conref] Transforming into D:\apps\Siemens\tc10_0228\dispatcher\Stage\DC\U426f6149c52791e6d1018\temp
   [conref] Processing D:\apps\Siemens\tc10_0228\dispatcher\Stage\DC\U426f6149c52791e6d1018\temp\X000072.xml
   [conref] Loading stylesheet D:\apps\Siemens\tc10_0228\dispatcher\Module\Translators\contmgmtpublish\lib\di
   [conref] [DOTX010E][ERROR]: Unable to find target for conref="X000073.xml#X000073/X000073_step1". Check to
     [move] Moving 1 file to D:\apps\Siemens\tc10_0228\dispatcher\Stage\DC\U426f6149c52791e6d1018\temp
```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9. Creating S1000D content

Overview of S1000D content

If you have installed the S1000D Content Management solution, you can manage documentation for the S1000D standard. The S1000D solution also includes base Content Management features. The way you relate, create, and edit content differs between the Content Management solutions. You can use the **Publication Structure** view to organize S1000D content.

> Note:
>
> To import SGML data for authoring in the S1000D solution, the **Content Management S1000D SGML Parser** feature must be selected in Teamcenter Environment Manager (TEM) when you install Teamcenter.

The dialog boxes you use to create S1000D objects contain all the data required by the S1000D specification. These items become elements in the resulting SGML or XML object. For example, the SGML or XML files contain the elements of the identification and status section that is required in certain objects. The content of the objects is created in an editing tool.

To download sample content that you can view or import, see *www.S1000D.org*, which includes the sample XML content and illustrations for a fictional bike for the most recent S1000D versions.

Content Management supports these objects for S1000D version 2.3 (SGML objects) and issues 4.0, 4.1, 4.2, and 5.0 (XML objects):

> Note:
>
> S1000D issue 2.3 is supported only on Linux and Windows.

- **Data Module**

  A data module is a self-contained information unit. Every data module contains an identification and status section and a content section that contains text and illustrations. Content Management supports the standard S1000D data modules types, including BREX, procedural type, and descriptive type.

- **Data Module List (DML)**

  A data module list (DML) identifies the data modules in a project. It contains an identification and status section and the data module requirement list content. The DML object can be related to data module objects, but it is not required. When you relate data modules to it, the DML can be used to group data modules together in a compiled dataset.

- **Data Dispatch Note (DDN)**

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A data dispatch note (DDN) contains information about the sender, receiver, and content of a dispatch. It can be related to many data modules. When the relation to a data module is made, additional SGML or XML code is automatically added to the DDN about the data module. A data module can be related to many DDNs.

- **Publication Module**

  A publication module defines the content and the structure of a publication. It contains an identification and status section and a content section that contains references to data modules, other publication modules, and legacy technical publications. The publication module for S1000D content is not the same type of object as the publication topic type used in Base Content Management.

- **Commentary**

  A commentary, or comment, is used to report issues on data modules during the verification process and the in-service phase of the product. It contains an identification and status section and a content section that contains the original comment and/or a response to a comment. A comment can be related to a data module, publication module, DML, or DDN; it must have at least one of these relations.

- **In Process Review Form**

  An in-process review form contains the review of data modules by the customer or the contractor.

- **SCORM Content Package**

  A SCORM content package contains the content and metadata for e-learning developed in accordance with the Sharable Content Object Reference Model (SCORM) standard.

- **Standard Numbering System (SNS)**

  An S1000D standard numbering system (SNS) structure defines the numbering scheme used in data modules for specific S1000D projects.

Create an S1000D item

1. Select the location in which you want to create the new S1000D object, and then either click **New Author Item...** , or choose **File→New→New Author Item**.

   > Note:
   >
   > You can select a folder in the **Home** component view or an S1000D object in either the **Home** component view or **Publication Structure** view.

2. In the **New Author Item** dialog box, expand **Complete List** and click the item you want to create. All S1000D items are listed with the **S1000D** prefix.

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3. Click **Next**.

4. In the **New Author Item** dialog box, enter the data for the object you are creating, according to the S1000D standard.

   For more information on the S1000D standard, see *www.S1000D.org*.

   > Note:
   >
   > When you create an S1000D 2.3 data module, you must enter one of the two following groups of options, even though they may not be marked as required:
   >
   > - **System Difference Code**, **Chapter Number**, **Section Number**, **Subsection**, and **Subject**
   > - **Support Equipment Variant Code**, **Equipment Category and Sub-Category Code**, **Equipment Identification Code**, **Component Identification Code**, **Extension Code**, and **Extension Producer**

5. Click **Finish**.

   If any of the attributes that comprise the item ID are not valid for the associated schema, a message box appears indicating which fields are invalid. For example, when creating a data module, the **Model Identifier** and **System Code** values are validated, but the **Security Class** value is not.

Create a new S1000D item based on an existing one

1. Select the revision of the S1000D item from which you want to create the new S1000D item, and then choose **File→Save As→Item(Revision)**.

2. In the **Save As** dialog box, modify the data for the new item you are creating, according to the S1000D standard.

   For more information on the S1000D standard, see *www.S1000D.org*.

   > Note:
   >
   > Any changes you make to the codes that comprise the **Export File Name** are automatically updated in the **Export File Name** when the new item is created. For example, if you change the **Item Location Code**, that character in the **Export File Name** is updated when the item is saved to the database.

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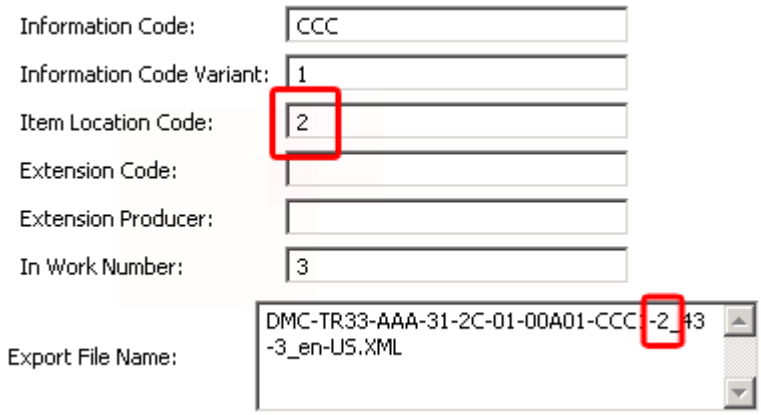

When you create an S1000D 2.3 data module, you must enter one of the two following groups of options, even though they may not be marked as required:

- **System Difference Code**, **Chapter Number**, **Section Number**, **Subsection**, and **Subject**
- **Support Equipment Variant Code**, **Equipment Category and Sub-Category Code**, **Equipment Identification Code**, **Component Identification Code**, **Extension Code**, and **Extension Producer**

3. Click **Next**.
4. For the **Define Attached Objects** step, click **Next** to accept the selected values.
5. For the **Related Objects information** step, enter the properties for the new S1000D item:
   a. Expand the dataset and the S1000D item information.
   b. Type the **Name** for the new dataset and new S1000D item.

      Tip:
      This is the item level object, not the revision.

   c. (Optional) Type a **Description** for the new dataset and new S1000D item.
   d. (Optional) Type an ID or click **Assign** to create an ID for the S1000D item.
   e. Click **Next**.
6. (Optional) For the **Assign Project Page** step, assign the S1000D item to one or more projects.
7. Click **Finish**.

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If any of the attributes that comprise the item ID are not valid for the associated schema, a message box appears indicating which fields are invalid. For example, when creating a data module, the **Model Identifier** and **System Code** values are validated, but the **Security Class** value is not.

Adding data modules to DMLs, DDNs, and publication modules

You can **relate** data modules to a data module list (DML), a data dispatch note (DDN), or a publication module (PM) to group data module references together in one document. When you relate a data module to a DML, DDN, or PM in Content Management, SGML, or XML elements from the data module are added to the DML, DDN, or PM.

To relate data modules to DMLs, PMs, and DDNs in S1000D 4.0, 4.1, 4.2, and 5.0, you must create a content topic as a child of the DML, PM, or DDN. Also, for PMs and DDNs, you must then create an additional topic.

Example:

Publication Line	Document Title	Topic Type	Occurrence Type
S1000D-C0419-S-2012-00003/...	Data Module List	DML-4-0	
000277/A;1-DML Content	DML Content	dmlContent	DC_TopicTopicR

Publication Line	Document Title	Topic Type	Occurrence Type
S1000D-C0410-K0999-2012-0...	Data Dispatch Note	DDN-4-0	
000271/A;1-Data Dispatch...	Data Dispatch Note ...	ddnContent-4-0	DC_TopicTopicR
000272/A;1-DDN Deliv...	DDN Delivery List	DDNDeliveryList-4-0	DC_TopicTopicR

Publication Line	Document Title	Topic Type	Occurrence Type
E2-K0378-00001-00/A;1-Publi...	Publication Module	PM-4-0	
000274/A;1-PM Content (...	PM Content	PM-4-0 content	DC_TopicTopicR
000275/A;1-PM Entry	PM Entry	PM-4-0 Entry	DC_TopicTopicR

To relate data modules to DMLs in S1000D 2.2/2.3, you relate the data modules directly to the DMLs. For DDNs, you must create a topic with a delivery list topic type as a child of the DDN. You then relate data modules to the delivery list topic.

You can also **create an S1000D data module list** by using a saved search.

Note:

Once any data module is related to a data module list, the saved search is no longer used for that data module list.

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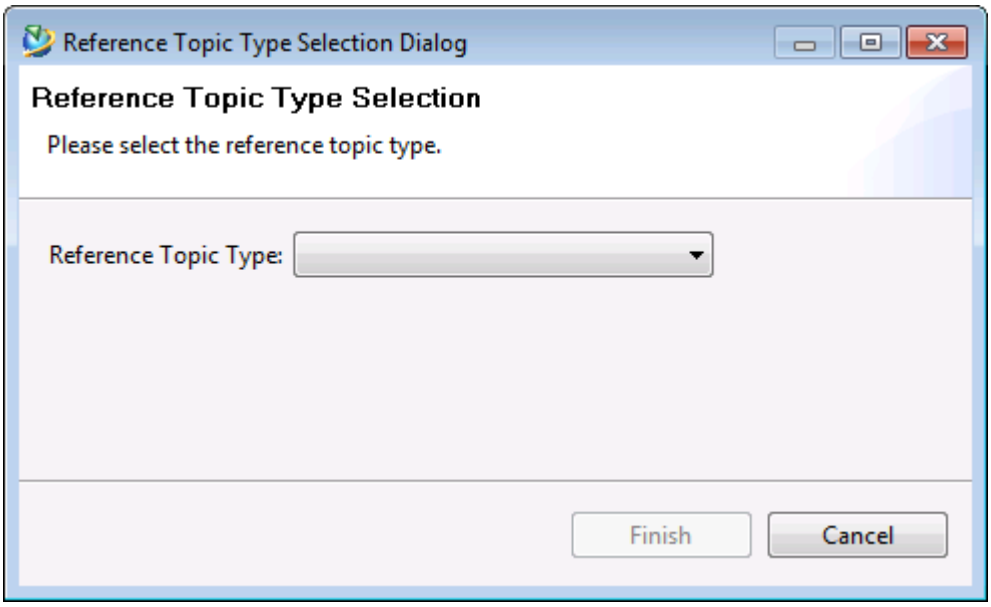
Relate data modules

You can relate data modules to a data module list (DML), a data dispatch note (DDN), or a publication module (PM).

1. Right-click the data module, and choose **Copy for Editor→Data Module Reference**.

   If more than one reference type is defined in your system, the **Reference Topic Type Selection** dialog box appears.



2. From the **Reference Topic Type** list, select the type of reference to create between the data module and the object you are relating it to.

3. Click **Finish**.

4. Click in a valid location in the content in the editing tool, and choose **Paste**.

Creating the structure of an S1000D publication module

To create the structure of an S1000D publication module, you assemble the hierarchy of objects, such as in this example.

Example:

- Publication Module

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- PM Content topic
  - PM Entry topic
    - Front Matter data module (title page appears as first page)
  - PM Entry topic
    - Other supported data module type (see list below)
  - PM Entry topic
    - Other supported data module type (see list below)

Publication Line	Document Title	Topic Type	Item Type
S1000DLIGHTING-C3002-EPWG1-00/A;1-Topic (View)		PM-4-1	S1000D Publication Module 4.0/...
000918/A;1-Topic (View)		PM Content 4-1	Topic
001096/A;1-Topic (View)		PM Entry 4-1	Topic
S1000DBIKE-AAA-D00-00-00-00AA-001A-A/A;4-Bicycle - Title ..	Bicycle - Title page	Front Matter-4-1	S1000D Data Module 4.0/4.1
000905/A;1-Topic (View)		PM Entry 4-1	Topic
S1000DLIGHTING-AAA-D00-00-00-00AA-040A-A/A;3-Electrical s...	Electrical system - Descripti..	Description-4-1	S1000D Data Module 4.0/4.1
000911/A;1-Topic (View)		PM Entry 4-1	Topic
S1000DLIGHTING-AAA-D00-00-00-00AA-341A-A/A;2-Lights - Ma.	Lights - Manual test	Procedural-4-1	S1000D Data Module 4.0/4.1
000913/A;1-Topic (View)		PM Entry 4-1	Topic
S1000DLIGHTING-AAA-D00-00-00-00AA-700A-A/A;2-Lighting - ...	Lighting - Assemble, install..	Procedural-4-1	S1000D Data Module 4.0/4.1
000914/A;1-Topic (View)		PM Entry 4-1	Topic
S1000DLIGHTING-AAA-D00-00-00-00AA-921A-A/A;2-Lighting - ...	Lighting - Remove and inst..	Procedural-4-1	S1000D Data Module 4.0/4.1
001135/A;1-Topic (View)		PM Entry 4-1	Topic
S1000DBIKE-AAA-D00-00-00-00AA-042A-A/A;2-Bicycle - Descrip..	Bicycle - Description of fun..	Description-4-1	S1000D Data Module 4.0/4.1
000917/A;1-Topic (View)		PM Entry 4-1	Topic
S1000DLIGHTING-AAA-D00-00-00-02AA-012A-A/A;2-Lights - C...	Lights - Caution repository	Common Inform...	S1000D Data Module 4.0/4.1

With the S1000D stylesheets provide upon installation, you can create the following types of S1000D publication modules for publishing to PDF or XHTML format. Your administrator can also create stylesheets for publishing additional S1000D publication types. The objects you add to the hierarchy and the stylesheets you use determine the **contents of the publication modules**.

- Service bulletin publication module - references service bulletin data modules
- Illustrated parts publication - references illustrated parts data modules
- General publication module - references one or more types of data modules. The following types are supported. If you include unsupported data modules in the publication module, the output includes text explaining that the type is unimplemented.

  Descriptive

  Fault

  Illustrated parts data

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Procedure

Schedule

Service bulletin

Front matter

Air crew

Contents of published S1000D publication modules

You can **publish** three types of S1000D publication modules to PDF or XHTML format. If you use the stylesheets provided upon installation and assemble the publication modules with the following structure, the published content contains the following:

Service bulletin publication module

- Front matter content:

  Title page

  Table of contents for each referenced data module in the publication module

  List of effective pages

  List of effective data modules

  Highlights, which includes reasons for updates and changes

- Content for each service bulletin data module:

  Table of contents

  List of tables

  List of figures

  Service bulletin content

- Acronym and term indices

Illustrated parts publication module

- Front matter content:

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Title page

Table of contents for each referenced data module in the publication module

List of effective pages

List of effective data modules

Highlights, which includes reasons for updates and changes

- Content for each description data module:

  Description content

- Content for each illustrated parts data module:

  Illustrated parts content

- Acronym and term indices

General publication module

- Front matter content:

  Title page

  Table of contents for each referenced data module in the publication module

  List of effective pages

  List of effective data modules

  Highlights, which includes reasons for updates and changes

- Content for each referenced data module:

  Table of contents

  List of tables

  List of figures

  Data module content

- Acronym and term indices

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Using saved searches to create data module lists

You can use saved searches to generate S1000D data module lists. If you use a saved search in a data module list, when you export or publish the data module list, the data modules in the saved search will be included, as if they were related to the data module list. This is particularly useful for large data module lists.

> Note:
>
> The saved search must be related to the topic in the data module list that contains the data module references. For example, in an S1000D 4.0 data module list this is the topic of the topic type **dmlContent**. In the **Home** component view, the saved search is related to the **dmlContent** topic revision.

When you relate data modules to data module lists using a saved search, they are related only as references. In the **Publication Structure** view, the data modules do not appear under the data module list. However, if you open the data module list for edit, and then save it, any data modules referenced from the saved search will be directly related to the data module list and will appear under the data module list in the **Publication Structure** view.

> Note:
>
> Once any data module is related to the data module list, the saved search is no longer used for that data module list.
>
> You cannot use a saved search to compose non-S1000D objects.

Create a data module list using a saved search

1. Search for the data modules you want to include in the data module list.
2. Create a saved search that includes the data modules.
3. In the **Home** component view, drag the saved search to the appropriate object:
   - For S1000D 2.3, drag it to the data module list revision.
   - For S1000D 4.0, 4.1, 4.2 and 5.0, drag it to the topic under the data module list that stores all the references.

   > Note:
   >
   > The data module must be a valid one for the data module list, as defined by your organization’s schemas. If it is not valid, the data module is not added to the data module list when published.

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Apply project-specific standard numbering system (SNS) codes to a new data module

An S1000D standard numbering system (SNS) structure defines the numbering scheme used in data modules for specific S1000D 4.0, 4.1, 4.2 and 5.0 projects. Your administrator creates an SNS structure for you to use. When you create a new data module in Content Management, you select a node of an SNS structure to apply its *data module code* (DMC) values and other data module detail values to the data module.

When you import a data module or graphic that use SNS codes, they are related to the appropriate note in the SNS structure based on their SNS. Objects that don't use an SNS, such as data dispatch notes, publication modules, and graphics with commercial and government entity (CAGE) codes, are related to the top node of the SNS structure.

Nodes in an SNS structure define the values for systems, subsystems, assemblies, and disassemblies.

1. Right-click the SNS structure in the **Home** component view or **Search Results** view, and choose **Show in Publication Structure**.

2. In the **Publication Structure** view, select the node of the structure whose values you want to use for the data module you are creating.

3. **Create the data module**.

   Values in **New Author Item** dialog box are populated from the SNS structure node you selected.

Import a data management requirement list

A data management requirement list (DMRL) identifies the data modules planned for a specific project. You can import a DMRL to Content Management to create data module objects for all data modules identified in the DMRL. You can import the data modules to a selected folder or as objects associated with a standard numbering system (SNS) structure.

To import a DMRL:

1. Prepare the .csv file.

2. Import the DMRL.

Prepare the .csv file

1. Use a text editor to create a .csv file to create a DMRL that lists the data modules you want to create in Content Management. Microsoft Office Excel is not recommended for this, since it may remove leading zeros.

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A sample .csv file is included in the administration data provided with the Content Management installation:

*TC_ROOT***contmgmts1000d40_data\data\admin\bulkImportDataModule.csv**

2. Include the following values, in the order listed. Use a comma for any optional value that is blank.

   Model identification code

   System difference code

   System code

   Subsystem code

   Sub-subsystem code

   Assembly code

   Disassembly code

   Disassembly code variant

   Information code

   Information code variant

   Item location code

   Language

   Extension code (optional)

   Extension Producer (optional)

   Learn Code (optional)

   Learn Event Code (optional)

   Technical Name

   Information Name (optional)

   Security classification

   Topic type

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Originator name

Originator CAGE code

Responsible partner company name

Responsible partner company CAGE code

Example:

This is one line representing a data module:

```
S1000DBIKE, TEMP, DA2, 0, 0, 00, 00, AB, 042, A, A, English US, , , , ,
Temp System,
Temp Description, 01, Description-4-1, ORG Name, ORG41, RPC Name, RPC41
```

Import the DMRL

1. Do one of the following:

   - Select the folder in which you want to place the imported DMRL.
   - Associate the DMRL with an SNS structure:

     a. In the **Home** component view or **Search Results** view, right-click the SNS structure to which you want to associate the DMRL, and choose **Show in Publication Structure**.

     b. In the **Publication Structure** view, select the node of the structure whose values you want to use for the DMRL you are importing.

2. Choose **Tools→Import→S1000D Project Data→Data Management Requirement List (DMRL)**.

3. In the **Bulk Import** dialog box, browse to and select the .csv file containing the DMRL.

4. Click **OK**.

   If you did not choose an SNS structure to associate the DMRL with, the **Import Status** dialog box appears, indicating that no SNS node was selected. Click either **Continue** to continue with the import or **Cancel** to cancel the import.

   When the import is complete, the **Import Results** dialog box appears, indicating the import completed successfully.

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Create a data module delivery

The data dispatch note (DDN) and data module list (DML) are used to create a delivery to transfer a set of project data modules between organizations. You create a delivery by first choosing a DML. During the process of creating the delivery, a DDN is created in Content Management, and a .zip file is created with the contents of the delivery. The DDN provides the metadata and the list of data modules in a CSDB transfer package.

When you create a delivery for a project, you can choose to deliver all data modules, only released data modules, only those not in last official delivery, or all data modules that have changed since the last delivery.

1. Select the DML for which you want to create a delivery, and choose **Tools→Export→Incremental Delivery**.

2. In the **Incremental Delivery** dialog box, do the following:

For this option	Do this
Language	Select the language you want to use for the exported content.
Graphic Mode	Select one of the following to indicate how the content references the graphic names: Caution: If you are using the S1000D administration data provided in the Content Management installation, select **Public ID**. • **Public ID** The public identifiers of the graphics are used in the content to reference the graphics. • **Import Original Name** The original names of the graphics are used in the content to reference the graphics. These are the file names of the graphics before they are imported into Content Management. • **XML Number**

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For this option	Do this
	The XML numbers of the graphics are used in the content to reference the graphics. When you choose this option, graphics are included in the export. • **Graphic Name** The names of the graphics are used in the content to reference the graphics. The graphic name is the name of the imported file without the file suffix. This option can be used when you want to import the publication or topic including graphics into another Content Management environment. When you choose this option, graphics are included in the export.
Graphic Priority (For graphic modes **Public ID** or **Import Original Name** only)	Select the graphic priority to determine in what order the topic's **graphic options** are selected for the output, based on the graphic usages set on the graphic option. Note: Graphic usages are set when a graphic is **imported**.
Transform Policy	If you would like to apply an XML transformation policy to the content you are exporting, select it from the list. A transformation policy can be used to modify content when it is published or exported. For example, it could convert units of measure, such as US standard to metric. Your administrator must create a transform policy before it is available for you to use from this dialog box.
Content	Select any of the following to choose the contents of the .zip file: • **Include Supporting Data** Includes the schemas for the exported topics. • **Include Graphic Data** Includes the graphics embedded in the exported topics.
Delivery	Select one of the following to choose the data modules to include in the delivery: • **Full Official**

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For this option	Do this
	Includes only the data modules that have been released. • **Full Unofficial** Includes all data modules. • **Incremental Official** Includes all released data modules not in the last full official delivery. • **Incremental Unofficial** Includes any data modules that changed since the last full official delivery.

3. Click **Next**.

4. In the **Data Dispatch Note for Incremental Delivery** dialog box, enter the data for the delivery you are creating.

   Tip:

   For the **Document Title**, enter a title that helps you identify the contents, for example, include *Full Official* in the title if it is a full official delivery.

5. Click **Next**.

6. In the next **Data Dispatch Note for Incremental Delivery** dialog box, enter the contact information for the delivery you are creating.

7. Click **Finish**.

8. In the **Save As** dialog box, select the folder in which to save the .zip file for the delivery.

   The DDN is created and related to the DML.

Validate data modules against a BREX data module

When authoring using the S1000D standard, you validate data modules against a business rules exchange (BREX) data module to verify that the data modules conform to a project's business rules. Content Management provides a validation tool, with which you can validate a single data module,

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a group of selected data modules, or all data modules in a data module list, data dispatch note, or publication module.

Your administrator can integrate a third-party editing tool through the **ContMgmtS1000D40Service** SOA service to validate a data module against a BREX data module from within the tool. Information about SOA services is provided in the *Services Reference*.

> Note:
>
> To access the *Services Reference*, install the Teamcenter developer references when you install Teamcenter online help, or go to https://support.sw.siemens.com.

1. Select one or more data modules, a data dispatch note, or a publication module, choose **Tools→BREX Validation**, and then choose one of the following:

   - **Run In Background**

     Runs the validation while you perform other tasks in Teamcenter. When the validation is completed, a log file is attached to each data module you selected.

   - **Wait for Results**

     Runs the validation while you wait for it to be completed. You cannot perform other tasks in Teamcenter while it is running. When the validation is completed, a log file is created.

   When the validation is completed, the **BREX Validation** dialog box appears, providing you with the option to view the log file. The log file lists the number of data modules that passed and failed the validation.

2. Click either **Yes** to show the log file, or **No** to close the dialog box without showing the log file.

S1000D workflow templates

Teamcenter provides workflow templates to automate processes for the S1000D 4.0, 4.1, 4.2, or 5.0 standard. You can modify the templates to meet your organization's requirements. The workflows can be used only for the Content Management objects specified below.

Content Management Comment Process

Use with: Commentary 4.0/4.1/4.2/5.0 objects

S1000D commentaries, or comments, are used to report issues for data modules, publication modules, data module lists, and data dispatch notes. After a comment is created and related to the object with the issue, this workflow is created with the comment as an attachment and is used to track the review and acceptance or rejection of the comment.

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In the provided workflow template, a task is assigned to the Engineering Designer resource pool. Most likely, your application administrator will modify this to a resource pool created for your organization. A resource pool is a group/role combination to which members can be subscribed. When a task is sent to a resource pool, a notification is sent to its members. Notification is sent to all members, subscribed members, or none based on the **EPM_resource_pool_recipients** preference. Once a member of the resource pool claims the task, it is removed from all other resource pool members' tasks and appears in the assigned member's task list.

Content Management Data Module Process

Use with: Data Module 4.0/4.1/4.2/5.0 objects

This workflow manages the data module development process, including assigning an author and various reviewers, authoring the data module, and reviewing the data module.

Data module properties such as **Issue Number**, **In Work**, and **Quality Assurance Status**, are updated during the workflow steps according to the S1000D specification. For example, the **Quality Assurance Status** of the data module, stored in the <qa> element, is updated when the data module completes first verification. The <firstVerification> element includes an attribute to indicate the type of verification: table top (tabtop), on object (onobject), or both (ttandoo). The **In Work** attribute is incremented each time the data module is sent back to the author to update.

This workflow requires these participants to be assigned: author, peer reviewer, engineering reviewer, and editorial reviewer.

Content Management Exchange Export Process

Use with: Data Dispatch Note 4.0/4.1/4.2/5.0 objects

Data dispatch notes are created to exchange data modules with partners or OEMs. This workflow manages the process of validating the S1000D objects in the data dispatch note and exporting the S1000D objects.

Content Management ICN Process

Use with: Illustration Request topics

As you develop publications, you may include illustrations in the content. This workflow manages the graphic creation process, including determining if an existing or new graphic is to be used, requesting a graphic, assigning an illustrator, and approving the graphic.

This workflow requires participants to be assigned. The lead author must be assigned at the start of the workflow. The illustrator is assigned during the workflow only if a new graphic is required. Since this workflow uses the dynamic participants, illustrator and lead author, you must route a topic in the workflow. This can be a topic type created by your organization or the provided illustration request topic modified to meet your needs.

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To enable the creation of illustration request topics, the administrator must import the illustration request topic type, available in the *TC_ROOT***contmgmts1000d40_data\data\admin** folder.

To create an illustration request topic:

1. Choose **File→New→New Author Item**, and select **Topic**.

2. In the **New Author Item** dialog box, choose **Illustration Request** from the **Select Topic Type** list.

Content Management Publication Module Plan

Use with: Publication Module 4.0/4.1/4.2/5.0 objects

Publication modules define the content and structure of a publication. This workflow manages the development, review, and approval of a publication module.

Content Management Publication Module Ready for Release

Use with: Publication Module 4.0/4.1/4.2/5.0 objects

This workflow manages the review and approval of a publication module as an entire document. The publication module properties **Issue Number**, **In Work**, and **Quality Assurance Status** are updated during the workflow steps according to the S1000D specification.

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10. Create a topic or publication from a template

1. In the **Publication Structure** view, click **Open Topic By ID** .
2. In the **ID** box, type a string to find the template's ID.
3. From the **Is Template** list box, select **true**.
4. Click **Find** .
5. Double-click the template in the result list to open it in the **Publication Structure** view.
6. Select the topic or publication, and choose **File→Duplicate** to **create a new topic or publication**.

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11. Copying content

Copy a topic

You can copy a topic in several ways. Copying is a quick way to create new topics or reuse the same topics in different locations.

You can copy a topic with or without its related topics in either the **Home** component view or the **Publication Structure** view. You can also copy topics into content in an editing tool, by either creating a new copy of a topic or by creating a reference to a source topic.

The location you are copying the topic to must be valid for the schema.

Do one of the following to copy a topic:

To copy this way	Do this
Copy a topic or topic revision and its related topics, and paste it either in a folder in the **Home** component view or in a structure in the **Publication Structure** view, creating another instance of the same topic and the same related topics. Note: When you paste a topic item, not a topic *revision*, in the **Publication Structure** view, the most current revision of the topic is used.	1. Right-click the topic, and choose **Copy**. 2. Right-click the location where you want to insert the topic and choose **Paste**. Note: If more than one reference type is defined in your system for the object type, the **Reference Topic Type Selection** dialog box appears. Select the reference type, and click **Finish**.
Copy the content of a topic and any related topics from the **Publication Structure** view into another topic in an editing tool, creating new content without a reference(s) to the source topic(s).	1. In the **Publication Structure** view, right-click the topic, and choose **Copy For Editor→Composed Content as Clone**. 2. Click in a valid location in the content in the editing tool, and choose **Paste**.
Copy a topic and any related topics from the **Publication Structure** view into another topic in an editing tool, creating a reference(s) to the source topic(s).	1. In the **Publication Structure** view, right-click the topic, and choose **Copy For Editor→Composed Content as Reference**. 2. Click in a valid location in the content in the editing tool, and choose **Paste**.

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To copy this way	Do this
	Note: You create the same result by dragging the topic into the **Publication Structure** view from another view.
Duplicate an existing publication or topic structure to create a new structure. You can create the new structure with new objects, references to existing objects, or a combination of both.	1. In the **Publication Structure** view, right-click the structure, and choose **File→Duplicate**. 2. Use the **Duplicate** dialog box to select the options for the new structure. 3. Click **OK**.

Duplicate a publication or topic structure

Duplicate an existing publication or topic structure to create a new structure based on all or portions of the existing structure. You can create the new structure with new objects, references to existing objects, or a combination of both. You can duplicate an entire publication structure or a structure of topics and subtopics within a publication.

> Note:
>
> This feature cannot be used for S1000D structures.

When you duplicate a structure that contains a topic with a reference to another topic, the reference is preserved between the new topics when both target and source topics are duplicated.

> Example:
>
> If you duplicate the 000132/B;1-headlamp_parts structure and its two topics, and the 000133/A;1-overview topic contains a link to the 000135/A;1-lightbulb topic, in the new structure 000160/A;1-headlamp_parts, the 000161/A;1-overview topic will contain a link to 000162/A;1-lightbulb. However, if you choose to duplicate 000132 and 000135, but not 000133, the link in 000133 will continue to point to 000135 and not 000162, so the 000133 topic may need to be modified to work correctly where it exists.

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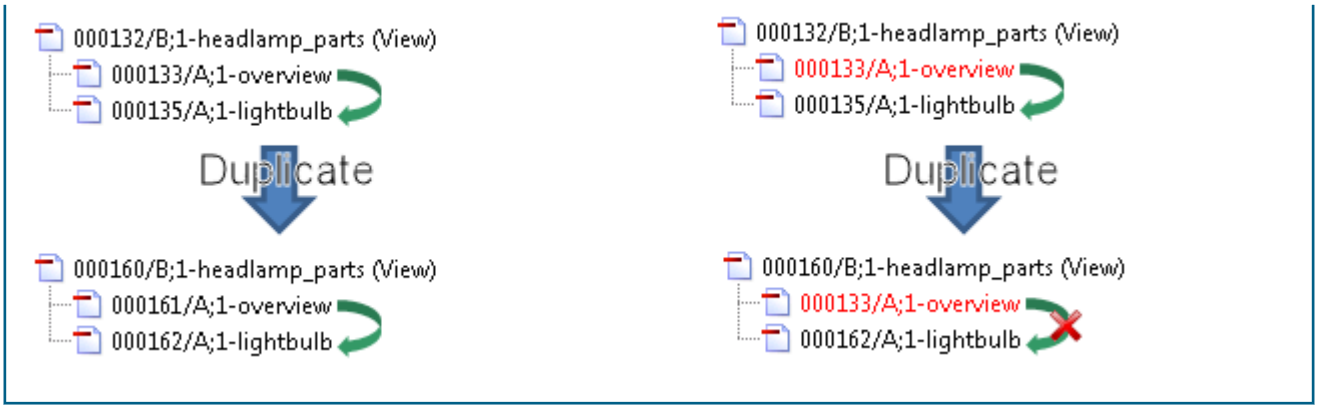
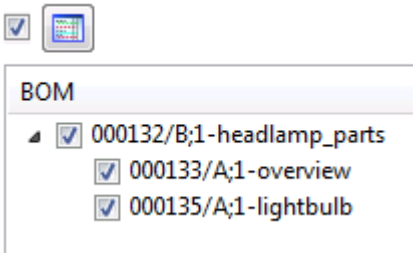


1. Open the publication or topic structure in the **Publication Structure** view.

2. Select the top line of the structure, and choose **File→Duplicate**.

3. In the **Duplicate** dialog box, select or clear the check box for each line to select the contents of the new structure:



   - If an item is selected, the item is copied to create a new object in the new structure.
   - If an item is not selected, a reference to the original object is created in the new structure.

   > Tip:
   >
   > To select all objects in the structure, select the **Duplicate all items** check box.

4. Choose one of the following methods to assign IDs to the duplicated items that are included in the new structure:

   - **Automatically assign new IDs to all items.**

     Do nothing in the **New Item ID by Selection** and **Default ID Mapping** sections.

   - **Assign new IDs by selecting the items you want to assign them to.**

     a. Use the **Ctrl** key and click to select the items in the structure to which you want to assign IDs.

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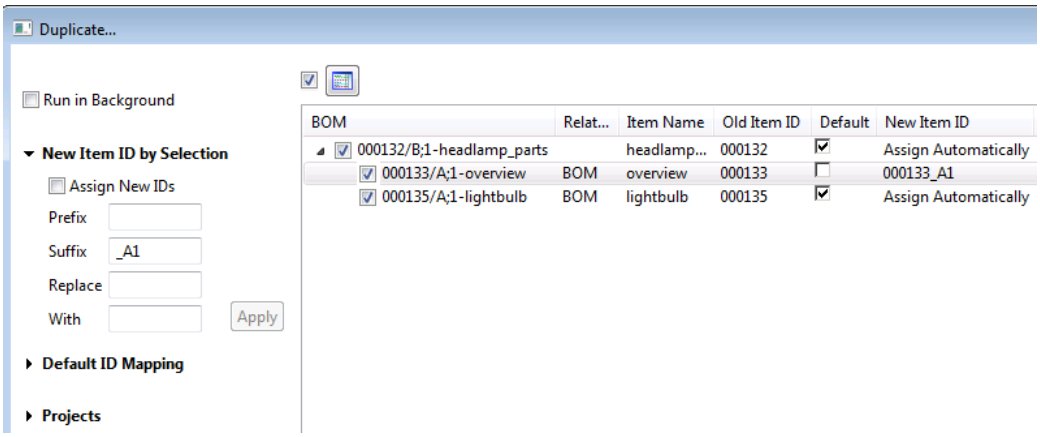
b. In the **New Item ID by Selection** section, either select **Assign New IDs** to automatically assign IDs, or enter one or more of the following:

Prefix	Adds a prefix to the original ID of each duplicated item, for example, **new_**.
Suffix	Adds a suffix after the original ID of each duplicated item, for example **_A1**.
Replace **With**	Replaces a specified substring in the original ID with another defined string in the duplicated ID. For example, you could replace **template** with **new**.

c. Click **Apply**.



- **Assign new IDs by using the Default check boxes in the structure.**

a. Select the **Default** check box for each item in the structure to which you want to assign IDs.

b. In the **Default ID Mapping** section, either select **Assign New IDs** to automatically assign IDs, or enter one or more of the following:

Prefix	Adds a prefix to the original ID of each duplicated item, for example, **new_**.
Suffix	Adds a suffix after the original ID of each duplicated item, for example **_A1**.
Replace **With**	Replaces a specified substring in the original ID with another defined string in the duplicated ID. For example, you could replace **template** with **new**.

c. Click **Apply**.

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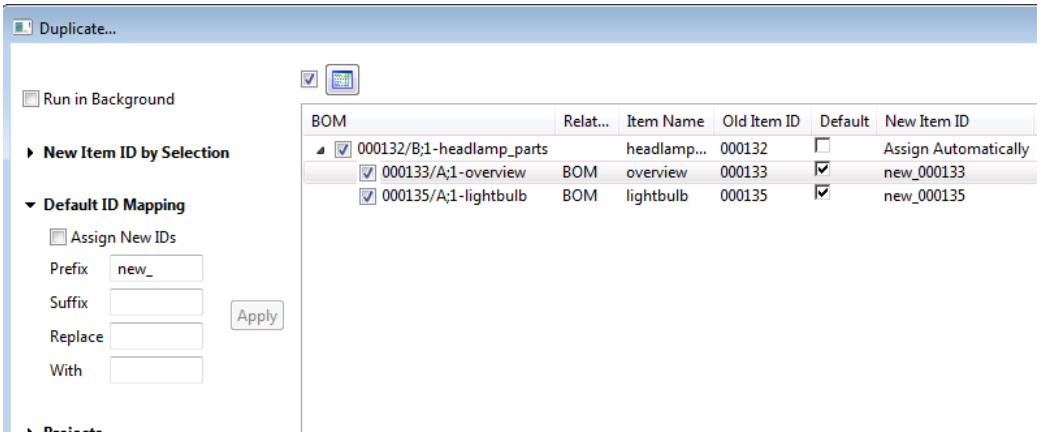

5. Assign items to projects as desired.

6. Click **OK**.

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12. Create a new revision of a topic

When you want to save a topic as it is and also work on a new version of the topic, you create a new *revision* of the topic using the **Revise** menu command and dialog box. The new revision has an incremented revision number.

- To create a revision for one topic:

  1. Select the topic revision and choose **File→Revise**.

  2. Use the **Revise** dialog box to further define the new topic revision.

- To create revisions for multiple topics:

  1. Use the Ctrl key to select the topics and then choose **File→Revise**.

  2. Use the **Multiple Object Revise** dialog box to edit the names of the new topic revisions.

> Note:
>
> To enable the ability to edit names of new topic revisions using the **Multiple Object Revise** dialog box, the **Multiple_revise_dialog_visible** preference must be set to **true**. If this preference is set to **false**, you may still revise multiple topics, but you cannot edit the names.

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13. Working with a publication structure

Working in the Publication Structure view

Use the **Publication Structure** view to create and maintain the contents of publications.

From the **Publication Structure** view, you can:

- **Add and move topics** to build the structures of publications
- **Remove** topics from publications
- **Open publications and topics for editing**
- **Publish publications and topics**

Add publications to the Publication Structure view

- Add topics, topic structures, and publications to the **Publication Structure** view using one of the following methods:

  > Note:
  >
  > If you select a topic or publication item, not a topic or publication *revision*, the most current revision is selected.

  - In the **Home** component view, double-click the publication or topic.
  - Use the **Show In Publication Structure** command.
    - Right-click the publication or topic in the **Home** component view, **Impact Analysis** view, or **Search Results** view, and choose **Show In Publication Structure**.
  - Click the **Open Topic by ID** button.
    1. In the **Publication Structure** view, click **Open Topic By ID** .
    2. In the **ID** box, type a string to find the ID of the publication or topic in the structure.
    3. Click **Find** .
    4. Double-click the topic or publication in the result list.
  - Click the **Most Recently Used (MRU)** button.

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This button opens any of the last four publication structures you opened. This list is saved across sessions.

1. In the **Publication Structure** view, click **Most Recently Used (MRU)** .

2. Click the topic or publication you want to open.

- Click a link.

  - Click a link in the **Open Items**, **History**, or **Favorites** sections of the navigation pane.

Add and move topics to build publications

> Caution:
>
> Do not attempt to modify the **Occurrence Type** assigned to topics. This may cause content processing functions to fail.

> Note:
>
> When you **add and move some DITA topics** to another topic or map, you must select the reference topic type.

- Add and move topics in the following ways:

  - In the **Publication Structure** view, drag topics within publications.

    > Note:
    >
    > When you move a topic to a new location in a publication, the location must be valid for the type of topic you are moving and the defined schema. If a location you point to is not valid, a message appears.

  - In the **Publication Structure** view, drag topics and create specific **relationship types**:

    > Note:
    >
    > Depending on the topic types you are working with and how they are configured in your system, this method may not be available.

    1. Select the topic you want to relate to another topic, and begin dragging it.

    2. Press and hold Ctrl+Shift.

    3. When the topic is over the topic you want to relate it to, release the mouse button, and then release Ctrl+Shift.

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4. In the **Relation Selection** dialog box, from the **Relation Selection** list box, select the relation type.

5. If you want the selected relation type to be the default in this dialog box for future relation selections, select **Save selection to preferences.**

6. Click **Finish**.

- Drag topics from the **Home** component view to publications in the **Publication Structure** view.

> Note:
>
> If you select a topic item, not a topic *revision*, the most current revision is moved.

- Cut and paste objects using Teamcenter functionality.

- Add or edit the XML elements in the publication when it is **open in an editing tool**.

Remove a topic from a publication in the Publication Structure view

When you remove a topic from a publication, its child topics are also removed.

1. In the **Publication Structure** view, right-click the topic you want to remove, and choose **Remove**.

2. In the **Remove** dialog box, click **Yes**.

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14. Working with topic relationships

Types of topic relationships

When you create the structure of a publication and place topics within other topics, parent and child topics are related. You can relate a topic to many parent topics, creating multiple instances of the same topic. Whenever the topic is modified at one location, the modifications are reflected in all locations where the topic is referenced.

Relationships between topics are created when topics are created or **moved** in the **Publication Structure** view. The following two types of relationships exist between topics in Content Management. However, depending on the reference types created by your administrator and the topic types you are working with, *you may have only one of these types in your system*.

- **Topic-to-topic relation**

  When a topic-to-topic relation appears in the editing tool, you see all the content of the related topic. Also, when a topic is published with a topic-to-topic relation to another topic, the published topic includes all the content of the related topic. The **Occurrence Type** in the **Publication Structure** view appears as **DC_TopicTopicR** for this relation type.

  > Note:
  >
  > This relationship type is also created when topics are **copied** using the **Copy For Editor→Composed Content as Reference** function in the Teamcenter client and then pasted in the editing tool.

- **Composable reference**

  When a composable reference appears in the editing tool, you see only a reference to the topic. However, when a topic is published with a composable reference to another topic, the published topic includes all the content of the referenced topic. The **Occurrence Type** in the **Publication Structure** view appears as **DC_ComposableReferenceR** for this relation type.

Viewing related objects

Ways to view related Content Management objects

Objects are related to other objects for different purposes. For example, parent and child topics are related, and topics have related graphics, documents, and translations. You can view related objects in these ways:

- **View related topics in the Publication Structure view**. This is a specialized view of Content Management objects and their relationships to other Content Management objects.

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- **View all related objects in the Relation Browser view**. This view graphically displays objects and their related items. It is available for multiple Teamcenter applications.

- **View all related objects in the Impact Analysis view**. This view graphically displays objects and their related items and can be used to perform where-referenced analyses. For example, it can be used to understand the impact of change. It is available for multiple Teamcenter applications.

View related topics in the Publication Structure view

1. In the **Home** component view, right-click the topic or publication, or the specific revision, and choose **Show In Publication Structure**.

   > Note:
   >
   > If you select a topic or publication item, not a topic or publication *revision*, the most current revision is selected.

2. In the **Publication Structure** view, right-click a topic and choose one of the following expand options:

   - **Expand**

     Displays one level below the topic you selected.

   - **Expand Below**

     Displays all levels below the topic you selected.

   - **Expand Below...**

     Displays a dialog box for you to select the number of levels you want to display.

   - **Collapse Below**

     Hides all the levels below the topic you selected.

View related objects in the Relation Browser

- Right-click the object you want to view in the **Relation Browser** and choose **Send To→Relation Browser**.

View related objects in the Impact Analysis view

- Select the object you want to view, and click the **Impact Analysis** tab.

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Validate content references

When you import content that references another object, such as a topic that references another topic, and the referenced object does not exist in Content Management, then the reference is unresolved. If you later import the referenced content, you can resolve the broken reference between the two objects.

The reference validation tool checks content for any broken references in Base, DITA, and S1000D content and creates references between topics that are imported or created at different times. You can validate references on a selected object or on a selected structure for all topics in the structure.

- Select the object revision and choose **Tools→Reference Validation**.

State of the content references	Result
No unresolved references are found or resolved.	The **Reference Validation Successful** message box appears.
Unresolved references are found, and Content Management resolves all the references between all objects.	The references are created and you can see the objects related to one another in Content Management.
Unresolved references are found, and Content Management cannot resolve one or more of the references.	The **Reference Validation** message box appears listing the content references that cannot be resolved.

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15. Editing content

Using an editing tool to edit content

The XML or SGML content of topics, including S1000D and DITA objects, is created and edited in an editing tool. You can also create a new topic within an existing topic by using an editing tool. Examples of editing tools compatible with Content Management include: XMetaL Author, FrameMaker, and XMLSpy. The editing tool that is launched when you open a topic, structure of topics, or publication depends on the tool selected in the **Edit preferences**.

When the content opens with the editing tool, it is saved in a local folder. Your editing tool can be disconnected from Teamcenter and your work with the content performed offline. While the editing tool is disconnected from Teamcenter, functions such as **Teamcenter CMS→Save and Close** are not available. To save edited and newly created topics to the database, the editing tool must be connected to Teamcenter. Editing tools are connected to Teamcenter when they are launched from the Teamcenter rich client. The local folder is typically:

C:\Documents and Settings*user name***\Teamcenter\contmgmt***version number***\edit***editing tool*

> Note:
>
> Editing tools are supported only on Windows clients.

Create and edit content in an editing tool

You edit the content of topics in an editing tool. You can also create new topics by adding the valid XML elements to topics that are open in an editing tool. When you save and check in edited content, new topics are created in Content Management with the appropriate relationships to the publication structure you are working in.

> Note:
>
> If you save a topic with a graphic that does not exist in Teamcenter, a warning message appears indicating the graphic cannot be found. The next time you edit the topic the graphic name in the XML is appended with **.error**.
>
> The **Teamcenter CMS** menu is not available in all editing tools.

1. In the **Publication Structure** view, do one of the following:

   - Edit a topic:

     a. Right-click the topic, and choose **Edit→Edit Topic**.

     b. In the **Check-Out** dialog box, click **Yes**.

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- Edit a topic without downloading referenced topics:

  > Tip:
  >
  > For topics with many references, this saves time.

  a. Right-click the topic, and choose **Edit→Edit Topic Without Referenced Topics**.

  b. In the **Check-Out** dialog box, click **Yes**.

- Edit a structure of topics:

  a. Right-click the parent topic, and choose **Check-out Structure**.

  b. In the **Check-Out** dialog box, click **Yes**.

  c. Right-click the main topic you are working with, and choose **Edit→Edit Topic**.

The content opens with the editing tool and is saved in a local folder. In the **Publication Structure** view, the topics you check out appear as checked out , and the topic you choose to edit appears in edit mode . The **Teamcenter CMS** menu appears in the editing tool's menu bar.

2. In the editing tool, edit the content and create new topics as necessary, as the schema structure allows.

3. When you are done editing the content and creating new topics within the topic, do one of the following:

   > Note:
   >
   > If you try to save and close a topic that references another topic that was removed, Teamcenter displays a message warning you that you cannot save the topic.

To do this	Do the following	For this result
Save your changes without closing the file.	Use the editing tool's options for saving files.	The file you are editing is updated on your local drive, the file remains unchanged in the database, and the content version of edited topics is not changed.
Save your changes and close the file.	Do one of the following: • In the editing tool, choose **Teamcenter CMS→Save and Close**.	The editing tool closes the file, the edited file is updated in the database, and its **content version** increases. Any new topics are created, the relationships between topics are created, and the new topics appear in the **Publication Structure** view.

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To do this	Do the following	For this result
	• Use the editing tool's options for saving files, and then in the **Publication Structure** view, right-click the topic, and choose **Edit→Save And Close Edit**.	
Save your changes, close the file, and maintain the translations.	Do one of the following: • In the editing tool, choose **Teamcenter CMS→Save with same Translation and Close**. • Use the editing tool's options for saving files, and then in the **Publication Structure** view, right-click the topic, and choose **Edit→Save With Same Translation and Close Edit**.	The editing tool closes the file and the edited file is updated in the database, but the **content version** of edited topics *does not* increase. This is useful when a topic has a related translated topic and you want the versions of the two to remain synchronized. Any new topics are created, the relationships between topics are created, and the new topics appear in the **Publication Structure** view.
Close the file without saving your changes.	Do one of the following: • Choose **Teamcenter CMS→Close**. • In the **Publication Structure** view, choose **Edit→Cancel Edit**.	The editing tool closes the file, the file remains unchanged in the database, and the content version of edited topics is not changed.

4. In the **Publication Structure** view, right-click the topmost topic, and choose **Edit→Check-in Structure**.

Set editing tool preferences

Use the **Edit** preferences to select the editing tool you use to edit content. Before you can set these preferences, your editing tool must be installed, and your application administrator must set up the tools for editing content.

These preferences apply to only your user account on your client computer. They do not affect other users' client computers or your user account on other computers. These preferences do not affect other Teamcenter applications.

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Note:

- Editing tools are supported only on Windows clients.
- If the editing tool is not starting after you set these preferences, click **Restart Tool Message Server** in the **Preferences** dialog box to assign a new port for the editing tool.

1. Choose **Window→Preferences**.
2. In the **Preferences** dialog box, expand **Teamcenter**, expand **Content Management**, and expand and select **Edit**.

   Tip:

   Use the **type filter text** box to list preferences you are looking for by typing the name or part of the name of the preference. Click to clear the box.

3. From the **Editor** list, select the editing tool to start when you choose to edit a topic.

   Note:

   If the editing tool has been installed and set up by your application administrator but it does not appear in the list, click **Reload Tools**, click **OK** to close the **Preferences** dialog box, and then re-open the dialog box and begin again.

4. Select one of the following editing tools, which you are setting the preferences for:
   - **Other Editors**
   - **Framemaker**
   - **XMLSpy**
   - **XMetal**
5. In the **Path** box, if the path to the tool's start file is different on this client than the one defined for the tool path in the editing tool object, type or browse to and select the path to the location of the start file on this client. For example: C:\Program Files\XMetaL 9.0\Author.
6. Click **Install** to install on the client any required plug-in for the tool. Typically, this installation is required only once per client.

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> Note:
>
> This applies only to FrameMaker, XMLSpy, and XMetaL.

7. Click **Apply**.

8. Click **OK** to close the **Preferences** dialog box.

Teamcenter CMS menu options

When you work with content in one of the following editing tools, the **Teamcenter CMS** menu appears on the toolbar.

- Altova XMLSpy
- Adobe Structured FrameMaker
- JustSystems XMetaL Author

The following describes the actions that can be performed from the **Teamcenter CMS** menu:

> Tip:
>
> If you are using XML Spy and the **Teamcenter CMS** menu does not appear on the toolbar, in **Edit preferences**, for the XML Spy tool, click **Uninstall** and then click **Install** to reinstall the required plug-in. Then in XML Spy, choose **Tools→Customize→Toolbars**, and then select **Reset All**.

Menu option	Function
Close	Closes the editing tool without saving changes. The topic is no longer in edit mode in Content Management. The edit icon no longer appears in front of the topic in the **Publication Structure** view.
Save and Close	Saves all changes and closes the editing tool. The **content version** of edited topics is increased. The saved file is stored in the database. The topic is no longer in edit mode in Content Management. The edit icon no longer appears in front of the topic in the **Publication Structure** view.
Save with same Translation and Close	Functions like **Save and Close**, except that the **content version** of edited topics is not increased, so its version remains the same as the version of any related translated topics.
Publish	Saves all changes and displays the **Publish** dialog box for the object.

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16. Working with links between topics

Types of topic links

A navigation link is text within a published topic, which when clicked, accesses another topic or another location within the same topic. You can insert two types of navigation links into a topic:

- **Floating navigation link**

  A floating navigation link enables you to create a link to the most current version of a topic.

- **Fixed navigation link**

  A fixed navigation link enables you to create a link to a specific version of a topic.

For both types of links, you can create a link to content below the topic level, for example, to a table or figure within a topic. When you do this, you can create a link to another topic or to another location within in the same topic.

Before you can use navigation links, your application administrator must enable this functionality.

Add a navigation link to a topic

1. In the **Publication Structure** view, right-click the topic you want to link to, choose **Copy For Editor**, and then choose one of the following:

   - **Floating Navigation Link**, to create link that always links to the most current version of the selected topic.

     > Example:
     >
     > At the time you create a link to a topic, the topic's version is A.1, and the link accesses version A.1 of the topic. Later, when the topic's version increases to B.1, the link then accesses version B.1 of the topic.

   - **Fixed Navigation Link**, to create a link to the version of the topic it exists at now.

     > Example:
     >
     > At the time you create a link to a topic, the topic's version is A.1, and the link accesses version A.1 of the topic. Later, when the topic's version increases to B.1, the link still accesses version A.1 of the topic.

2. **Open the topic** in which you want to insert the link, if it is not already open.

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3. In the editing tool, click in a valid location in the content, and choose **Paste**.

   In Content Management, the link is related to the topic as a content reference, and the link appears in the content. For example:

   Floating navigation link:

   ```
   <xref href="X000151.xml" linktyp="floating" version=
   "CURRENT">Creating a topic</xref>
   ```

   Fixed navigation link:

   ```
   <xref href="X000151.xml" linktyp="fixed" version="B">Creating a
   topic</xref>
   ```

   In the **Publication Structure** view, links appear in the structure with an **Occurrence Type** of **Topic Content Reference** or **Topic Cross Reference**, depending on how your application administrator set up navigation links.

Add a link to content within a topic

1. **Open the topic** that you want to create a link to, if it is not already open.

2. Go to the location in the topic that you want to create a link to, for example a title, table, or paragraph tag, and add an ID value to the tag. The value must begin with a letter.

   > Example:
   >
   > ```
   > <title id="addrecord">Adding a record</title>
   > ```
   >
   > In this example, you use the ID that you are attaching to the title to create a link to this topic that goes directly to this title.

3. In the **Publication Structure** view, right-click the topic you want to link to (the one you just added the ID to), choose **Copy For Editor**, and then choose one of the following:

   - **Floating Navigation Link**, to create link that always links to the most current version of the selected topic.

     > Example:
     >
     > At the time you create a link to a topic, the topic's version is A.1, and the link accesses version A.1 of the topic. Later, when the topic's version increases to B.1, the link then accesses version B.1 of the topic.

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- **Fixed Navigation Link**, to create a link to the version of the topic it exists at now.

  Example:

  At the time you create a link to a topic, the topic's version is A.1, and the link accesses version A.1 of the topic. Later, when the topic's version increases to B.1, the link still accesses version A.1 of the topic.

4. **Open the topic** in which you want to insert the link, if it is not already open.

5. In the editing tool, click in a valid location in the content, and choose **Paste**.

6. In the href value of the link, at the end of the XML number, add a forward slash and the ID you created in step 2, which you are creating the link to.

   Example:

   ```
   <xref href="X000152.xml/addrecord" linktyp="floating" version=
   "CURRENT">Adding a record</xref>
   ```

   In Content Management, the link is related to the topic as a content reference.

   In the **Publication Structure** view, links appear in the structure with an **Occurrence Type** of **Topic Content Reference** or **Topic Cross Reference**, depending on how your application administrator set up navigation links.

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17. Importing and exporting documents

Prerequisites for importing documents

If you have existing XML or SGML content outside of the Content Management application, you can import it to Content Management from a local or network drive.

Prerequisites for importing documents are as follows:

- All graphics referenced in the document must be imported to the database.
- The structure of the document must match the topic type structure (and its schemas) defined in the application.
- The document must have the language attribute defined in order to relate it to other documents and graphics. If the language attribute is not defined before you import a document, you can define the language attribute after the import by modifying the document's properties.
- (Optional) When the structure of the document is different from the topic type structure (and its schemas) defined in Content Management, an XSLT stylesheet that converts the document(s) being imported into a valid structure can be used. To use this stylesheet on import, it must exist in Content Management.
- When you import a document with a DITA **conref**, the filename in the conref must be in the format **item_id.dita** for topics and **item_id.ditamap** for maps.

  Example:

  ```
  conref="X000001.dita#X000001"

     conref="X000001.dita#X000001/para1"

     conref="X000124.ditamap"

     conref="X000124.ditamap#topic1"
  ```

- To import SGML data for authoring in the S1000D solution, the **Content Management S1000D SGML Parser** feature must be selected in Teamcenter Environment Manager (TEM) when you install Teamcenter.

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Import a document

> Note:
>
> When importing, if your property values contain non-ASCII characters, you may get an error about exceeding the allowed length even though your property value is within the length limit. This is due to the fact that non-ASCII characters may take more storgae space depending on the encoding used, for example, if you use the UTF-8 encoding, all ASCII characters are one byte but most Japanese characters are three bytes.

Import existing XML or SGML content to work with it in the Content Management application. Imported documents are placed in a folder according to how your user interface (UI) options are set.

1. Complete the **prerequisites** for importing documents.
2. Choose **Tools→Import→Document**.
3. In the **Import Documents from File** dialog box, do the following:

For this option	Do this
From Directory	Browse to and select the folder containing the document you want to import.
File names	a. (Optional) Select the **Show all Files** check box to show the hidden files in the folder. b. Select the check box for each document that you want to import. Tip: Click **Select All** or **Deselect All** to select or deselect all files listed.
Stylesheet	If the content being imported must be transformed, either because it is not valid for any existing topic type or because data in the content must be changed, select a stylesheet to use for the import. If this option is not available, then no stylesheet of this type exists. When the XML document being imported matches the structure of a topic type and its related schema defined in the system, select **(No StyleSheet)** because no part of the document is to be transformed before import.

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For this option	Do this
Graphic Attribute Mapping	Select the appropriate graphic attribute mapping defined by your application administrator.
Graphic Mode	If the XML document contains references to graphics, select one of the following options to indicate how the document references the graphic names: Note: You must import the graphics to be referenced before importing the document that refers to the graphics. How these graphics are imported and named determines which option you choose. • **Public ID** The public identifiers of the graphics are used in the XML document to reference graphics. • **Import Original Name** The names of the graphics when imported are used in the XML document to reference graphics. • **XML Number** The XML numbers of the graphics are used in the XML document to reference graphics. • **Graphic Name** The names of the graphics with or without the file extensions are used in the XML document to reference graphics.
Reuse Existing Topic	Select the following options to indicate how the import searches for and handles topics already existing in the database or if you want to use the ID or XML number of the imported topic as its item ID in Teamcenter. Note: If none of these options are selected, all topics are imported as new objects with new item IDs, regardless

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For this option	Do this
	of whether topics with identical item IDs or content already exist in the database. • **Find by XML Number** Select this option to search the database for a topic with the same item ID as the ID or XML number of topics in the document you are importing. If a topic is not found with the same item ID, then the ID or XML number of the topic is used as the item ID instead of being auto-generated. Also, the imported file name is stored in the topic's **Original Imported Name** property. If your documents use content references, you must select this option to ensure content references are preserved for Base Content Management and DITA documents, since content references use item ID/XML numbers. • **Overwrite existing** If a topic exists in the database with the same item ID as the ID or XML number of the topic being imported, selecting this option causes the topic in the database to be replaced with the one that is being imported. If this option is not selected, a message appears indicating that a topic with the same ID already exists in the database. Use this option to preserve content references, since references use the item ID. Note: This option can be selected only when the **Find by XML Number** option is selected. • **Find by Content** Select this option to search the database for topics with the same content as that in any of the topics you are importing. When a topic is found with the exact content, (including tags and attribute values) as the one being imported, the topic is not imported.

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For this option	Do this
	Topic content includes attributes, such as a revision. For example, if you import a topic with the same ID and choose **Find by Content** with a change in the revision attribute in the topic content, Teamcenter creates a new topic.

4. Click **Finish**.

Import a DITA map

Import a DITA map to bring the map into the Content Management application. When you import a DITA map, the DITA topics it references are also imported. Imported objects are placed in a folder according to how your user interface (UI) options are set in the rich client.

> Note:
>
> When importing, if your property values contain non-ASCII characters, you may get an error about exceeding the allowed length even though your property value is within the length limit. This is due to the fact that non-ASCII characters may take more storgae space depending on the encoding used, for example, if you use the UTF-8 encoding, all ASCII characters are one byte but most Japanese characters are three bytes.

When you import a document with a DITA **conref**, the filename in the conref must be in the format **item_id.dita** for topics and **item_id.ditamap** for maps.

> Example:
>
> `conref="X000001.dita#X000001"`
>
> `conref="X000001.dita#X000001/para1"`
>
> `conref="X000124.ditamap"`
>
> `conref="X000124.ditamap#topic1"`

1. Choose **Tools→Import→DITA Map**.

2. In the **Import DITA Map from File** dialog box, do the following:

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For this option	Do this
From Directory	Browse to and select the folder containing the maps you want to import.
File names	a. (Optional) Select the **Show all Files** check box to show the hidden files in the folder. b. Select the check box for each document that you want to import. Tip: Click **Select All** or **Deselect All** to select or deselect all files listed.
Stylesheet	If the map being imported must be transformed, either because it is not valid for any existing topic type or because data in the content must be changed, select a stylesheet to use for the import. If this option is not available, it indicates that stylesheet of this type does not exist. When the XML document being imported matches the structure of a topic type and its related schema defined in the system, select **(No StyleSheet)** because no part of the document must be transformed before import.
Graphic Attribute Mapping	Select the appropriate graphic attribute mapping defined by your application administrator.
Graphic Mode	If the content being imported contains references to graphics, select one of the following options to indicate how the content references the graphic names: Note: You must import the graphics to be referenced before importing the document that refers to the graphics. • **Public ID** The public identifiers of the graphics are used in the content to reference graphics. • **Import Original Name** The names of the graphics when imported are used in the content to reference graphics.

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For this option	Do this
	• **XML Number** The XML numbers of the graphics are used in the content reference graphics. • **Graphic Name** The names of the graphics with or without the file extensions are used in the content to reference graphics.
Reuse Existing Topic	Select the following options to indicate how the import searches for and handles topics already existing in the database, or if you want to use the ID or XML number of the imported topic as its item ID in Teamcenter. Note: If none of these options are selected, all topics are imported as new objects with new item IDs, regardless of whether topics with identical item IDs or content already exists in the database. • **Find by XML Number** Select this option to search the database for a topic with the same item ID as the ID or XML number of topics in the document you are importing. If a topic is not found with the same item ID, then the ID or XML number of the topic is used as the item ID instead of being autogenerated. • **Overwrite existing** If a topic exists in the database with the same item ID as the ID or XML number of the topic being imported, selecting this option causes the topic in the database to be replaced with the one that is being imported. If this option is not selected, a message appears indicating that a topic with the same ID already exists in the database. Use this option to preserve content references as references use the item ID.

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For this option	Do this
	Note: This option can be selected only when the **Find by XML Number** option is selected. • **Find by Content** Select this option to search the database for topics with the same content as any of the topics you are importing. When a topic is found with the *exact* content (including tags and attribute values) as the one being imported, the topic is not imported.

3. Click **Finish**.

Export a topic or publication

Export an XML or SGML document to transfer it from one Content Management system to another or to work with it in another application. When you export a document, it is saved in a .zip file.

1. Select the topic or publication you want to export, and choose **Tools→Export→Document**.

2. In the **Export Composition** dialog box, do the following:

For this option	Do this
Language	Select the language you want to use for the exported content.
Graphic Mode	Select one of the following to indicate how the content references the graphic names: Note: • The way you export graphics impacts whether the references to graphics can be resolved when the exported content is imported into another system. • To include graphics in the export, select either **Public ID** or **Import Original Name**. If you select **XML Number** or **Graphic Name**, graphics are not exported.

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For this option	Do this
	• These characters are invalid in the public ID or original import name of graphics: `/|~`',;:\"*?<>`. When you export a topic containing graphics with these characters, they are converted to an underscore (_). • **Public ID** The public identifiers of the graphics are used in the content to reference the graphics. • **Import Original Name** The original names of the graphics are used in the content to reference the graphics. These are the file names of the graphics before they are imported into Content Management. • **XML Number** The XML numbers of the graphics are used in the content to reference the graphics. • **Graphic Name** The names of the graphics are used in the content to reference the graphics. The graphic name is the name of the imported file without the file suffix. This option can be used when you want to import the publication or topic including graphics into another Content Management environment.
Graphic Priority (For graphic modes **Public ID** or **Import Original Name** only)	Select the graphic priority to determine in what order the topic's **graphic options** are selected for the output, based on the graphic usages set on the graphic option. Note: Graphic usages are set when a graphic is **imported**.
Transform Policy	If you would like to apply an XML transformation policy to the content you are exporting, select it from the list. A transformation policy can be used to modify content when it is published or exported. For example, it could convert units of measure, such as US standard to metric.

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For this option	Do this
	Your administrator must create a transform policy before it is available for you to use from this dialog box.
Content	Select any of the following to choose the contents of the .zip file: • **Include Main Content** Includes the XML files for the topic content. • **Include Supporting Data** Includes the schemas for the exported topics. • **Include Graphics Data** Includes the graphics embedded in the exported topics.
References	Select any of the following to choose the content to include in the export: • **Include Content References** Includes topics that are referenced by the topic or publication you are exporting. • **Include Compose References** Includes topics that are referenced by composable reference relations. Composable topic references are created by relating topics in the Teamcenter client. This reference type is typically used to enable the creation of DITA dynamic maps and S1000D data dispatch notes, data module lists, and publication modules.

3. Click **Finish**.

4. In the **Save As** dialog box, select the folder in which to save the exported content.

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18. Publishing and previewing content

Overview of publishing and previewing content

When you publish a topic or publication, Content Management renders it to the selected output format, based on the stylesheets and applications you have available. This may be HTML, XHTML, PDF, or a proprietary format.

To view content in the **Preview** view, you publish it using the **InternalViewer** tool. You may also view topics with viewing tools installed on the client and set up in Content Management by the application administrator. These are useful when a quick or remote preview session is needed, without the processing time required to generate a PDF document.

You can set **Publish Content preferences** to specify the default publishing tool, style type, and language displayed in the **Publish** dialog box when you select a topic to be published.

When you publish content through a publishing server, you can use the Dispatcher request administration console to monitor the publishing progress.

Before you publish a topic or publication, you can **view the estimated file size**.

Set publishing preferences

Use the **Publish Content** preferences to set window preferences for how items are published.

These preferences apply to only your user account on your client computer. They do not affect other users' client computers or your user account on other computers. These preferences do not affect other Teamcenter applications.

1. Choose **Window→Preferences**.

2. In the **Preferences** dialog box, expand **Teamcenter**, and then expand **Content Management**.

3. Click **Publish Content**.

4. From the **Default Publish Tool** list, select the default publishing tool displayed in the **Publish** dialog box when you select a topic to be published.

5. From the **Default Style Type** list, select the default style type displayed in the **Publish** dialog box when you select a topic to be published.

6. From the **Default Language** list, select the default language displayed in the **Publish** dialog box when you select a topic to be published.

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7. Click **Apply**.

8. Click **OK** to close the **Preferences** dialog box.

Publish and preview output

1. Do one of the following:

   - In Teamcenter right-click the topic, publication, or map revision, and choose either **Publish Content** or **Tools→Publish Content**.

   - With the topic, publication, or map revision open in an editing tool, choose **Teamcenter CMS→Publish**.

2. In the **Publish** dialog box, do the following:

For this option	Do this
Tool	Select the publishing tool for the type of output you are generating. The available tools depend on the tools that have been installed on your computer and set up in the system by your application administrator.
StyleType	Select the style type (collection of stylesheets) to be used to publish the content. The style types are set up by your application administrator.
Language	Select the language in which to publish the resulting output. Note: If the translation of the selected language does not exist, Content Management publishes the content in the master language. Or, if a **Fallback Language** is defined and a translation is available, the content is published in that language.
Compose Version Selection	Select the version of the content to be published. Note: This option is not available when you publish from the **Publication Structure** view, as the content is published with the revision rule in effect for the view. However, you can apply a different revision rule in the view.

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For this option	Do this
Translation Version Selection	Select the translated version of the content to be published when a language other than the master language is selected: • **Match Topic** If the latest **content version** in the master language is the same as the latest content version of the translation, the translation is selected for publishing. Otherwise the master language is used. • **Latest Received** The latest received translation in the selected language is selected for publishing regardless of the **content version** in the master language. However, if no translation exists for the selected language, the master language is used. • **Received** The latest received translation in the selected language with a **content version** older than or equal to the master language version is selected for publishing. If all translation content versions are newer, or if no translation exists for the selected language, the master language is used. This option is typically used when you publish an older version of the content and you do not want to include translations that have newer content.
Resulting File Folder	Browse to and select the folder in which the published document will be stored. This path is saved and is displayed the next time the **Publish** dialog box appears. This option is available only for client-side publishing tools other than **InternalViewer**.
Resulting File Name	Type the name of the file (without a suffix). By default, the XML number of the topic, document, or map is used. This option is available only for client-side publishing tools other than **InternalViewer**.
Register Result (Not available with all tools)	If you want to create a composed or reviewer document, select the type: • **Composed Document** A composed document that has completed the review process. • **Reviewer Document**

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For this option	Do this
	A composed document that must be submitted to a workflow for review.
Transform Policy	If you would like to apply an XML transformation policy to the content you are publishing, select it from the list. A transformation policy can be used to modify content when it is published or exported. For example, it could convert units of measure, such as US standard to metric.
Schema Validation	Select how publication should be done based on the schema validation results. You can select from the following options: • **Publish with validation errors** • **Do not publish on validation errors** • **Publish without validation** Note that the schema validation options that you see may differ depending on how your administrator has configured it.
DITA Value Filter Topics in the Map	To use **author-defined DITA value filters**: a. Click **Find DITAVALs**. b. Select the filters to apply to the map.
DITA Value Filters	To use DITA value filters defined by your administrator, select the filters to apply to the map.
Publish to File System	Note: This option appears only if your application administer has enabled publishing to a file system. Select the check box to publish the output to a folder on your network. If you do not know the location of the publish folder, contact your application administrator. Note: If you select this option, you must also select **Register Result**.
View	Select the check box to display the output in the **Preview** view.

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For this option	Do this
	This option is not available for all tools and output types. The check box is selected automatically when you use a tool that displays output in the **Preview** view.

3. To display the estimated size of the published file before you publish it, click **Estimate Size**.

   The size is estimated from the XML and any included graphics file sizes. This can be different from the final output size since different file formats have different compression schemes.

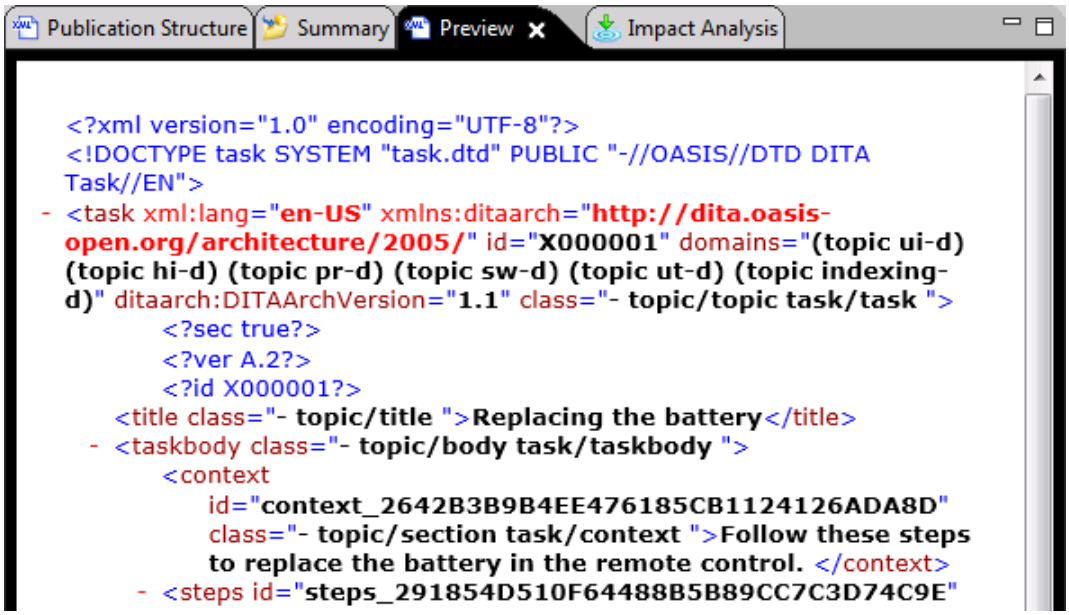
4. Click **Finish**.

Preview content in XML or SGML

You can view the XML or SGML markup of a topic or publication without opening it in an editing tool.

- In the **Home** component view, right-click the topic or publication and choose **Show Content**.

  The content's XML or SGML appears in the **Preview** view.



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Understanding publishing results

> Note:
>
> When you publish content through a publishing server, you can use the Dispatcher request administration console to monitor the publishing progress.

Content published to the Preview view

When you publish content using the **InternalViewer** tool, it appears in the **Preview** view.

Content in composed and reviewer documents

You can create a **composed or reviewer document** when you publish content. The composed document revision or reviewer document revision is related to the topic you selected for publishing, and the dataset (.zip file) created by the process is related to the composed or reviewer document revision. For certain types of output, such as PDF, the output file is also related to the composed or reviewer document revision as a dataset. The **owner** of the output file is the same as the **owner** of the document revision. You may need to refresh the file structure after publishing to see the composed or reviewer document related to the publication or topic.

When you publish the same content multiple times, newer composed or reviewer documents overwrite existing ones if you select the same options when you publish. However, if you publish content with one or more different options selected in the **Publish** dialog box, an additional composed or reviewer document revision is created and related to the topic or publication you selected for publishing. These options include: **Language**, **Compose Version Selection**, **Style Type**, **DITA Filter Value**, and **Transform Policy**.

Additional composed or reviewer documents are also created each time you publish content with different **variants**.

Content published to a file system

You can publish output to a file system if your application administrator has configured your system to support that. Each time you publish the same revision of a topic or publication, the output file replaces the one stored in the system folder. However, if you revise content that you published to the file system, and then publish it again, the system creates a folder for the newly revised files. The folder structure contains folders for: the content type of the renditions (such as HTML or PDF), the item ID of the topic or publication, the language, and a subfolder for each revision published. The first time you publish the topic or publication it is saved in folder A. After you revise and publish it again, it is saved in folder B, and so on. The most recent revision of the published content is also saved in a folder named CURRENT. The folder names *do not* necessarily correspond to revision levels of the content they contain.

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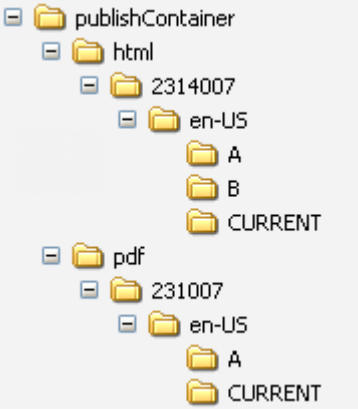
Note:

To publish output to a file system, your application administer must configure your system to enable publishing to a file system.

Example:



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19. Using variants for publications

The process for using variants in Content Management

Variants allow you to create publications that include topics based on the variant configuration you set on the publication and the variant conditions you set on the items in the publication. For example, you can create a car owner manual for various trim levels, **S** (standard), **LX** (luxury sedan), and **LE** (limited edition), and include topics for the features included with the trim levels, such as power seats, navigation system, and sunroof. When you publish the publication, the resulting composed document in the **Home** component view indicates the variants that were selected when it was published.

Variants in Content Management work for publications in a similar way as they do for product structures in Structure Manager. In fact, in Content Management you can use options that are defined in Structure Manager.

Although Teamcenter provides you with two methods to create variants, modular or classic, only classic variants are supported in Content Management. To ensure that the variant mode always opens in the classic mode, set the **PSEVariantsMode** preference to **legacy**.

To configure variants for publications, you follow this process:

1. **Create or find options to use for the configuration of the publication.**
2. **Add variant conditions to topics in the publication.**
3. **Set variant rules for the different variations of the publication structure.**

Create variant options for publications

The first step in configuring variants for a publication is creating the options for the publication structure.

Example:

You are creating a publication for a car owner manual. The car is manufactured with the following trim levels:

- S (standard), which includes a 2.0 L engine, manual transmission, cloth seats, and 4-speaker sound system.
- LS (luxury sedan), which includes a 2.4 L engine, automatic or manual transmission, cloth or leather seats, and 6-speaker sound system.

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- LE (limited edition), which includes a 2.4 L engine, automatic transmission, leather seats, and a premium sound system.

Instead of creating new options, you could choose options created in the product structure in Structure Manager. The *Structure Management on Rich Client — Usage* provides an example of a product structure from which you could choose options.

Options have a string type or a numeric type and a name. The type of option you can create depends on the settings of the **PSM_classic_variants_text_families** and **PSM_classic_variants_numeric_families** preferences.

Note:

Since Content Management supports only classic variants, ensure the **PSEVariantsMode** preference is set to **legacy**.

1. Open the publication in the **Publication Structure** view.

2. Choose **View→Show/Hide Data Panel** or click **Show/Hide Data Panel** .

3. In the data pane, click the **Variants** tab and select the line representing the owning publication or topic revision to store the variant data. Typically this is the top-level item in the structure, in this example, a publication for the car owner manual. You can also create variants at different levels of the publication structure, as you might in the product structure.

4. Click the **Options** branch in the variant data tree.

5. In the **Option** dialog box, enter the necessary options, for example:

   a. In the **Name** box, type **trim level**.

   b. Optionally, enter the information about the trim level option in the **Description** box.

   c. In the **Value** box, type an allowed value (**LE**) and press Enter or **+** (plus).

      The value appears in the list of allowed values.

   d. Enter the other allowed values, typing each and then pressing Enter for each one (**S**, **LS**).

6. Click **Create** to create the option. A **+** (plus) symbol appears against the **Options** branch in the variant data tree indicating that Teamcenter created the options.

7. Repeat steps 5 and 6 to define other options on the publication, for example **model year** (**2013**, **2014**, **2015**).

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8. Click **Save** to save the changes. If you forget to do this, Teamcenter prompts you when you select another line in the publication.

   True appears in the **Has Classic Variant Data (HCVD)** column for the publication line.

9. Repeat steps 3 through 8 to define options on other topics in the structure. For example, you could create a section of the manual for the operation of a trailer towing package, and set options on the section for the different types of towing packages.

Copying and modifying options

Create new options from existing options

When an option has values similar to those on an existing option, it may be quicker to create the new option values from those of the existing option:

1. If necessary, choose **View→Show/Hide Data Panel** or click the **Show/Hide Data Panel** button on the toolbar.

   Teamcenter opens the data pane.

2. Click the **Variants** tab and select the option to copy in the **Options** branch of the variant data tree.

   Teamcenter displays the **Option** dialog box, prepopulated with the values and name of the original option.

3. In the **Option** dialog box, type a new name for the option (duplicate names within an item are not allowed) and modify the values as required.

4. Click **Create** to create the new option.

5. Click **Save** to save the changes.

Change option values

1. If necessary, choose **View→Show/Hide Data Panel** or click the **Show/Hide Data Panel** button on the toolbar.

   Teamcenter opens the data pane.

2. Click the **Variants** tab and select the structure line with the item revision that owns (stores) the option whose values you want to change. If you are unsure of the owning item, you can identify this from the **Variant Rule** dialog box.

3. Expand the **Options** branch in the variant data tree.

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4. Select the option whose values you want to change.

   Teamcenter displays the allowed values in the **Option** dialog box.

5. In the **Option** dialog box, do one of the following:

   - Enter another allowed value and press the Enter key.
   - Select the value and click **–** (minus button) to remove an allowed value from an option.

6. Click **Modify** and Teamcenter updates the contents of the selected option.

7. Click **Save** to save the changes.

> Note:
>
> Any variant data that references removed option values can no longer be set as these values are not available for selection. You typically create a new revision of the item if you need to preserve the historic data.
>
> You can set the **PS_variant_value_protect** preference to protect variant values from unauthorized modifications.
>
> If a value is obsolete but is still referenced by a variant rule, default, derived default, or variant condition, it is represented by a **<?>** icon.

Rename an option

1. If necessary, choose **View→Show/Hide Data Panel** or click the **Show/Hide Data Panel** button on the toolbar.

   Teamcenter opens the data pane.

2. Click the **Variants** tab and select the option to rename in the **Options** branch of the variant data tree.

3. Type a new name and click **Modify** to modify the option.

4. Click **Save** to save the changes.

> Note:
>
> You cannot rename an option that is used in more than one revision of the item or in any expression.

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Also, you cannot rename an option that is shared between sites in a Multi-Site Collaboration environment.

Remove an option

To remove an option from its owning item revision:

1. If necessary, choose **View→Show/Hide Data Panel** or click the **Show/Hide Data Panel** button on the toolbar.

   Teamcenter opens the data pane.

2. Click the **Variants** tab and select the option to remove in the **Options** branch of the variant data tree.

3. Click **Delete** in the **Option** dialog box.

Note:

You cannot remove an option that is used in any expression.

Deleting an option

When you delete (remove) an option, you remove it only from the item revision. When you remove the option from the last item revision that owns it, you are (in effect) deleting the option.

- You cannot remove an option from an item revision to which you do not have write access.
- You cannot delete an option that is used in a variant condition. If you attempt to do this, Teamcenter displays an error message that lists all the revisions that have occurrences with variant conditions referencing that option.

Working with option defaults

Default options allow you to preset option values in the variant rule. The preset value may be:

- Fixed

  A fixed default value is a value that you specify. For example, the option **engine** could have a default value set to **2.0 L**.

- Derived

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A derived default is a value that is set to a value that depends on a condition. For example, the option **seats** could have a value set to **leather** if **trim level = LX**.

Defaults are owned by an item revision, like other variant data. Use the **Variant Rule** dialog box to identify the item a default was set on and whether the default is fixed or derived.

You can identify if an item has variant data attached by viewing the **HVD - Has Variant Data** column in the **Publication Structure** view.

You can override option values or reinstate them as necessary.

You specify fixed and specify derived option defaults for publications in a similar way as you do in Structure Manager.

Add variant conditions to topics in the publication

After you define the options for the publication structure, you add variant conditions to the topics in the publication. For example, if you have a topic for the operation of the manual transmission you can assign a condition to the topic that will include it in the owner manuals for the cars with a manual transmission.

You create variant conditions in the scope of a specific option. If you move the structure line out of the scope of the option referenced in the variant condition, the variant condition is not retained.

1. Ensure you have displayed the **Variant Formula** column in the **Publication Structure** view.

2. Select the topic for which you want to create variant conditions.

3. Click **Variant Condition**, or double-click either the **Variant Conditions** or **Variant Formula** property cells.

   Teamcenter displays the **Variant Condition** dialog box. The upper part of the dialog box shows the individual clauses that comprise a variant condition. You can use the buttons to move clauses up or down, delete a clause, or bracket clauses. The lower part of the dialog box allows you to define a clause, and you can use the following buttons to control how a clause is added to the list in the upper area:

   - Replace
   - Insert
   - Append
   - Clear

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4. Click next to the **Option** box, to view the available options, and click the option you want to work with, for example, **trim level**. Only the options currently loaded in the **Publication Structure** view are listed, because their owning item is loaded or they are used in a variant condition in the structure.

   The **(Owning) Item** box is automatically populated.

5. Use the following operators to construct a variant condition:

=	Equal to
! =	Not equal to
>	Greater than
> =	Greater than or equal to
<	Less than
< =	Less than or equal to

> Note:
>
> If you use **>**, **> =**, **<**, or **< =** operators, the values of the associated option must be numeric and only decimal values are permitted.
>
> **Not (!)** is higher than **AND (&)**; **AND (&)** higher than **OR (|)**. That is, **A OR B AND A = A OR (B AND A)**.

6. From the **Value** list, select the value for the option, for example, **LS**.

7. Click **Append** .

   The clause is added to the list. It clears the **Value** box and shows the option's owning item.

8. To add to the list of clauses, click either **AND** or **OR**, and repeat the above steps to select another option.

   Teamcenter displays the second clause in the list in the upper part of the dialog box.

   Teamcenter constructs a variant condition from the defined clauses joined by **AND** and **OR** operators. When a configuration depends on more than one option, you can configure complex variant conditions.

> Note:
>
> If you are only specifying one clause in a condition, you can set the **AND** switch or the **OR** switch.

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9. Click **OK** to create the variant condition on the occurrence.

Modifying variant conditions

Insert a clause before another clause

1. Specify the new clause.

2. Select the clause before which you want to insert the new clause.

3. Click **Insert** .

   Teamcenter inserts the new clause above the selected clause.

Replace a clause

Replacing a clause can be very useful with large compound conditions containing many clauses because this action does not change the order. Preserving clause order maintains the algebra and makes scanning for occurrences with similar conditions easier.

1. Specify the replacement clause.

2. Select the clause to replaced in the list.

3. Click **Replace** .

   Teamcenter replaces the original clause with the new one.

Copy a clause

1. Select the clause to copy and click **Copy** . You can also double-click the clause. This action copies the option name, value, and operator setting to the boxes and sets the **And / Or** button in the lower part of the dialog box.

2. Edit the value and/or operator, set the appropriate **AND** or **OR** button, and append the clause.

3. Select an existing clause and click **Replace** to replace the existing clause. You can also click **Insert** to place the clause above the selected clause.

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> Note:
>
> You can use **Copy** in conjunction with **Replace**, as a convenient way to edit variant conditions.

Remove a clause

To remove a clause, select the clause and click **Delete** ✕ .

Move a clause

To change the position of a clause within a condition, select the clause and click **Up** ↑ or **Down** ↓.

You can move multiple clauses in a single operation by selecting a range of clauses before clicking the appropriate arrow button.

Group a clause

You can change the grouping of clauses by adding and removing brackets, as follows:

> Note:
>
> Teamcenter supports multiple levels of grouping.

To add brackets around a range of clauses, select the range of clauses and click **(...)**.

To remove brackets from around a range of clauses, select the range of clauses, including the lines that contain both the opening and closing brackets, and click **(...)**.

Remove a variant condition from an occurrence

1. Select the structure line representing the occurrence and click **Edit Variant Condition** on the toolbar.

   Teamcenter displays the **Variant Condition** dialog box.

2. Select all of the clauses in the **Variant Condition** dialog box and click **Delete** ✕ to remove all the clauses.

3. Click **OK** to apply the change to the occurrence (that is, effectively remove the variant condition).

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Setting variant rules on publications

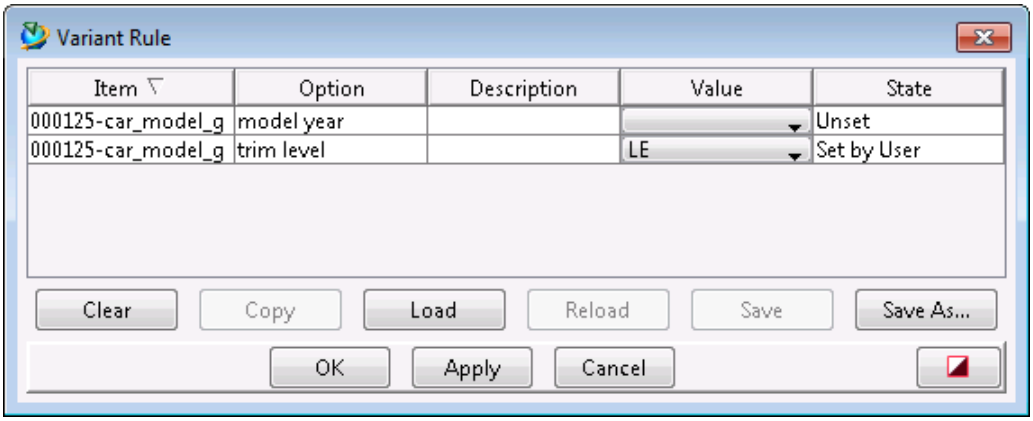
Set a variant rule

After you create options and variant conditions, you can set a variant rule on a publication structure to create a configuration of the publication based on the selected options.

1. Select the top level line in the publication in the **Publication Structure** view.

2. Click **Variant Rule** or choose **Tools→Variants→Configure Variants**.

   The **Variant Rule** dialog box appears. If the **Configure** dialog box appears instead, click .



3. Find the option you want to set (for example, **trim level**), and from the **Value** list, select the value for the option (for example, **LE**).

   The state of the option changes from **Unset** to **Set by User**.

4. Repeat step 3 to set additional options on the publication.

   To see the variant rule applied to the publication as you select the options, click **Apply**.

5. When you are done setting the variant rule, click **OK**.

   The variant rule is applied to the publication, and the topics are included or excluded based on the rule.

Unset a variant rule

1. Select the top level line in the publication in the **Publication Structure** view.

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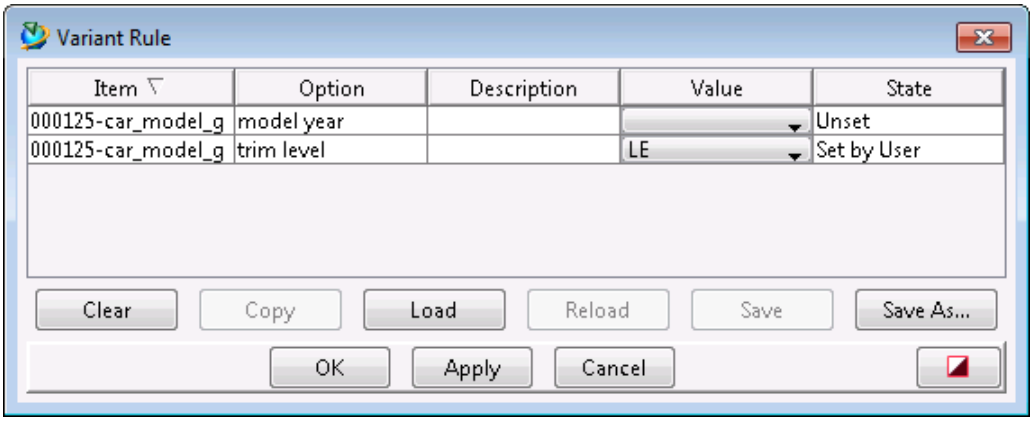
2. Click **Variant Rule** or choose **Tools→Variant Rule**.

   The **Variant Rule** dialog box appears. If the **Configure** dialog box appears instead, click .



3. Find the option you want to unset (for example, **trim level**), and from the **Value** list, select a blank value.

   The state of the option changes from **Set by User** to **Unset**.

4. Repeat step 3 to unset additional options on the publication.

   To see the variant rule applied to the publication as you unset the options, click **Apply**.

5. When you are done working with the variant rule, click **OK**.

   The variant rule is applied to the publication, and the topics are included or excluded based on the rule.

Working with variant rule checks

Variant rule checks allow you to define combinations of option values that are not allowed. A variant rule check consists of a condition (for example, **trim level = LX AND transmission = manual**) and an error message (for example, **Incompatible trim level and transmission**). Teamcenter displays an error message containing the condition and message if the rule check is triggered when you set values in the variant rule.

Set variant rule check

1. Open the data pane by choosing **View→Show/Hide Data Panel** or clicking **Show/Hide Data Panel** .

2. On the data pane, click the **Variants** tab.

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3. Select the line representing the owning publication or topic revision on which you want to set the rule check.

4. Select the **Rule Checks** branch in the variant data tree.

   Teamcenter displays the **Rule Check** dialog box.

5. In the **Warning Text** box, enter an error message, for example, **Incompatible trim level and transmission**.

6. Define the relevant variant condition, for example, **trim level = LX AND transmission = manual**.

7. Click **Create** .

   Teamcenter creates the rule check.

8. Expand the **Rule Check** branch and verify the new rule check is added below any that already existed, for example:

   ```
   ERROR Incompatible trim level and transmission IF trim level = LX
   AND transmission = manual
   ```

9. If you need to change the rule check, select it in the **Rule Check** branch of the variant data tree. Teamcenter displays the **Rule Check** dialog box, allowing you to change any of the boxes.

10. Click **Modify** to apply the changes.

11. Click **Save** to save the changes.

    A **Y** appears in the **Has Variant Data (HVD)** column of the properties table, if variant data was not already created.

Modify a rule check

1. Select the rule check you want to change in the **Rule Check** branch of the variant data tree.

   Teamcenter displays the **Rule Check** dialog box containing details of the rule check.

2. In the dialog box, change the appropriate boxes.

3. Click **Modify** to apply the changes.

4. Click **Save** to save the changes.

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Delete rule checks

1. Select the rule check to delete in the **Rule Check** branch of the variant data tree.

   Teamcenter displays the **Rule Check** dialog box.

2. In the dialog box, click **Delete** ✕ and the selected rule check disappears.

3. Click **Save** to save the changes.

Show and hide unconfigured components

When you are working with the publication structure, you can choose to show all the topics in the structure or hide the topics with variant conditions that are not configured for the current variant rule.

The ability to show or hide unconfigured components is determined by the setting of the **PSEShowUnconfigdVarPref** preference.

1. With the publication in the **Publication Structure** view, show or hide all unconfigured components by clicking **Show Unconfigured Variants** or by choosing **View→Show Unconfigured Variants**, to toggle between the two settings.

2. Use the **VOC - Variant Occ. Config'd** column to identify the configured components. This column shows a **Y** if the component is configured, is blank if it is not configured, or **?** if Teamcenter cannot determine if it is configured. The **?** indicator appears when a variant condition contains options that are unset in the variant rule.

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20. Comparing topics

How topics are compared in Content Management

You can use a third-party comparing tool to view the differences between two topics. You can compare different topics or two revisions of the same topic; however the topics you compare must be the same topic type. If your comparing tool supports the merging of content, you can perform the merge in the tool and then save the changes to the database.

When you compare two revisions of the same topic and open them at the same time, the latest revision is selected as the *left side* topic, which means that it appears on the left side of the window in the comparing tool. If you are merging content, the left side topic is the one that receives and stores the merged content. When you open topics individually for comparing, the first topic you select is the left side.

Compare two revisions of the same topic

When you use this method to compare two revisions of the same topic, the one with the latest revision is selected as the left topic.

1. In the **Home** component view, hold the Shift key as you click each of the two topic revisions you want to compare, so that they are both selected. Then right-click one of the topic revisions and choose **Compare/Merge→Launch Compare**.

2. If you do not have the left side topic checked out, the **Compare: Selection** dialog box appears. Do one of the following:

   - If you will not be saving merged content, select **Continue Compare**.

   - If you want the option to save merged content, select **Cancel Compare**, and then check out the left side topic.

   Depending on the how your comparing tool is set up, both topics may open in the comparing tool, or a dialog box may appear so that you can select the files to open.

3. Use the comparing tool to view the differences in the topics and merge any differences if necessary (if the tools supports merging of the contents).

4. If you merged the topics, save the changes in the comparing tool, and in Teamcenter, right-click the topic that is checked out and choose **Compare/Merge→Save Merged Result**.

5. Check in the topic.

6. Close the comparing tool.

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Compare two different topics

Use this method to compare two different topics. You can also use this method to compare two revisions of the same topic if you want to select which of the two revisions is opened as the left topic.

1. In the **Home** component view, right-click the topic revision of the first topic you want to compare, and choose **Compare/Merge→Select as Left Side to Compare**.

2. If you do not have the topic checked out, the **Compare: Selection** dialog box appears. Do one of the following:

   - If you will not be saving merged content, select **Continue Compare**.

   - If you want the option to save merged content, select **Cancel Compare**, and then check out the left side topic.

   Depending on the how your comparing tool is set up, the topic may open in the comparing tool, or a dialog box may appear so that you can select the file to open.

3. Right-click the topic revision for the second topic in the comparison, and choose **Compare/Merge→Launch Compare**.

4. Use the comparing tool to view the differences in the topics and merge any differences if necessary (if the tools supports merging of the contents).

5. If you merged the topics, save the changes in the comparing tool, and then in Teamcenter, right-click the topic that is checked out and choose **Compare/Merge→Save Merged Result**.

6. Check in the topic.

7. Close the comparing tool.

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21. Working with documents for review

Overview of composed and reviewer documents

Composed and reviewer documents contain all the contents of a topic, topic structure, or publication you select to publish. You can use composed and reviewer documents to distribute content to subject matter experts or other reviewers or to retain the published documents' compiled XML for future use. Composed and reviewer documents contain the same content; they are named differently so you can choose an appropriate name for the business practice you are using it for.

You can use Teamcenter workflows for document reviews by using Workflow Designer and Workflow Viewer.

The composed document revision or reviewer document revision is related to the topic or publication you selected for publishing, and a dataset (.zip file) created by the process is related to the document revision. The .zip file contains the XML file and all supporting files, such as schemas and stylesheets. For certain types of output, such as PDF, the output file is also related to the composed or reviewer document revision as a dataset.

When you publish the same content multiple times, newer composed or reviewer documents overwrite existing ones if you select the same options when you publish. However, if you publish content with one or more different options selected in the **Publish** dialog box, an additional composed or reviewer document revision is created and related to the topic or publication you selected for publishing. These options include: **Language**, **Compose Version Selection**, **Style Type**, **DITA Filter Value**, and **Transform Policy**.

Additional composed or reviewer documents are also created each time you publish content with different **variants**.

> Example:
>
> In this example the topic was published three times with different languages selected (am=US English, and fr=French) or with different variants, which are shown under **ConfigurationContext**.

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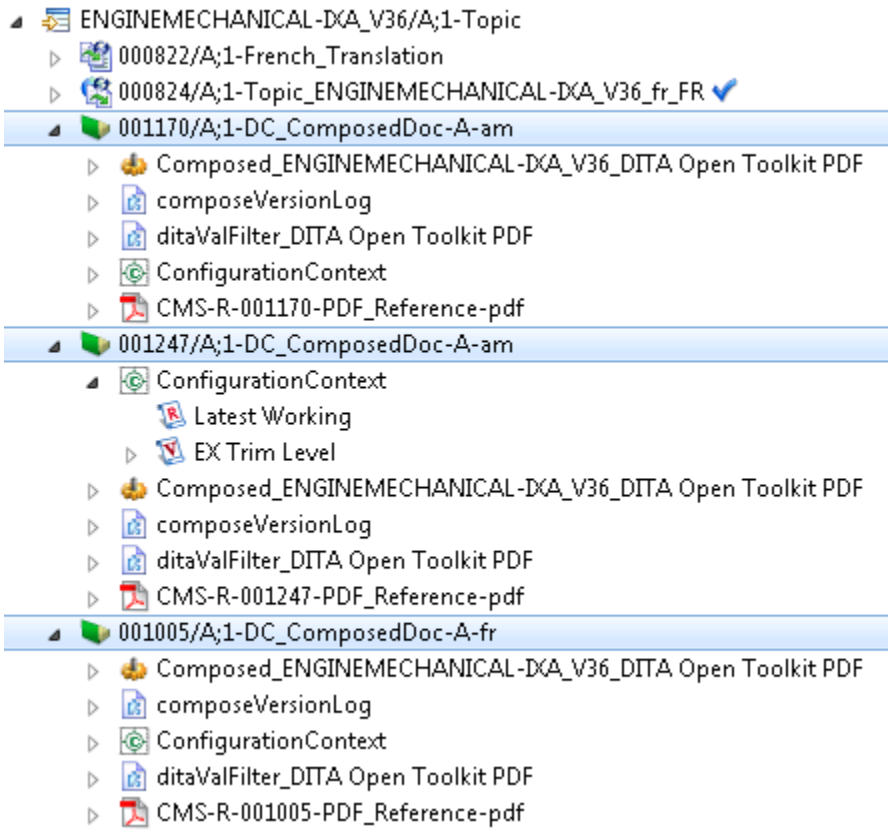

Create a composed or reviewer document

To create a composed or reviewer document:

- Select the desired **Register Result** option when you **publish content**.

View a composed or reviewer document

If a topic has a composed or reviewer document, you can view it with a tool you have installed. You must have markup capabilities enabled and the markup privilege.

- Select the document revision and choose **File→View/MarkUp**.

Exporting and importing composed documents

If a topic has a composed (or reviewer) document, it has a related .zip file that contains the XML file and all supporting files.

You can export the .zip file and unzip and edit its contents outside of Teamcenter, and then import it back to the system. You can import the content either as a composed document in a .zip file or as an

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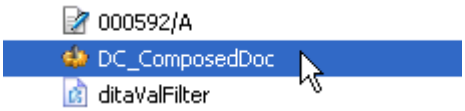
XML document. When you import an XML document, the edited topic content replaces the content in the system. When you import a .zip file, the topic content is not replaced.

Export a composed document

1. Right-click the composed or reviewer document you want to export, and choose **Named References**.



2. In the **Named References** dialog box, select the .zip file for the document and click **Download...**.

3. In the **Downloading File** dialog box, browse to and select the location where you want to save the .zip file, and click **Download**.

4. Close the **Named References** dialog box.

Import a composed document as an XML document

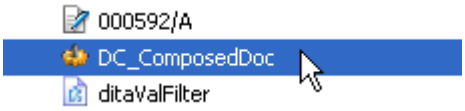
Import the content of a composed document as an XML document if you made changes to the composed document after you exported it and you want to import the changes to the appropriate topics.

- Follow the steps to **import a document**, being sure to:
  - Browse to and select the .xml file containing the composed document.
  - Select the **Find by XML Number** option.

Import a composed document as a named reference

Import a composed document as a named reference if you do not want to import changes to the content of the composed document's components.

1. Right-click the composed or reviewer document you want to import, and choose **Named References**.



2. In the **Named References** dialog box, select the .zip file for the document and click **Upload...**.

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3. In the **Upload File** dialog box, browse to and select the .zip file you want to import, and click **Upload**.

4. Close the **Named References** dialog box.

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22. Using graphics in your content

Overview of graphics in Content Management

To use graphics that are created in graphic editing programs, you must import them to Content Management. To edit an imported graphic, you must check it out and edit it in the graphic editing program.

A *graphic* item is a top level graphic object that has one or more graphic files related to it. Graphic objects related to the graphic item are called *graphic options*. Graphic options have related graphic files, or images. You can import multiple graphic images for different uses. For example, you can import a higher-resolution image, such as an .eps file, for publishing to PDF, and a smaller resolution image, such as a .png file, for displaying the graphic in the XML edit tool during an editing session. Beginning in Teamcenter 10.0, you can import JT files to use as graphic options in Content Management.

When you import a graphic option, you select the language to associate with it, which is imported as its **Language Reference** property. If you choose more than one language, a graphic option is imported for each language. You can also select **Multilanguage** for the **Language** option for a graphic that can be used for any language translation.

Note:

- The naming convention used for graphics impacts whether you can resolve the graphic references when you import XML content that contains those references. Your Content Management administrator should provide guidelines for working with graphics to match the configuration enabled in XML attribute mappings.
- The S1000D standard does not require you to associate a language with graphics, and the sample S1000D graphic attribute mapping does not support multiple languages for graphics.
- DITA OT publishing tools support the following image formats, although .tif and .png formats may not be supported for PDF output:

  .jpg

  .gif

  .bmp

  .tif

  .eps

  .svg

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.png

Set tagging preferences for graphics

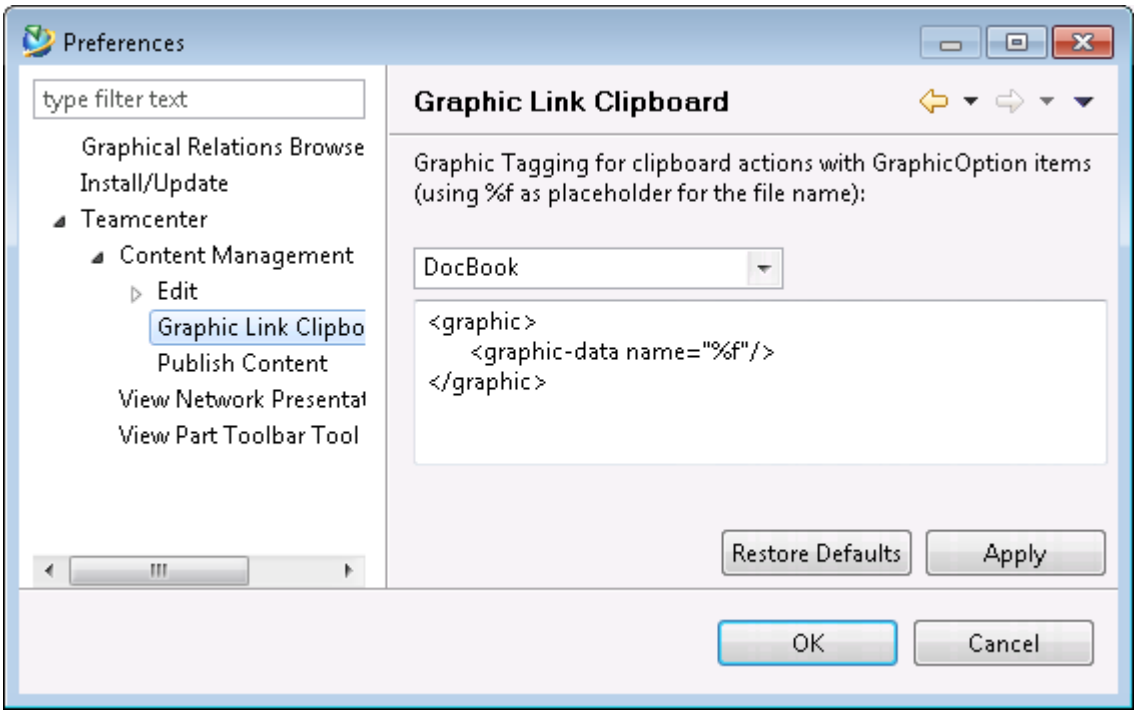
Use the **Graphic Link Clipboard** preference to set the tagging to be used in the editing tool when a graphic is copied and pasted from Content Management to the editing tool. When graphic options are pasted into content and the content is saved to the database, the content is decomposed and the graphic option is substituted with the graphic item, so that other graphic options can be used when the content is subsequently composed.

This preference applies to only your user account on your client computer. It does not affect other users' client computers or your user account on other computers. This preference does not affect other Teamcenter applications.

1. Choose **Window→Preferences**.

2. In the **Preferences** dialog box, expand **Teamcenter**, and then expand **Content Management**.

3. Click **Graphic Link Clipboard**.



4. From the list box, select the option for the publication standard you are using:

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> Note:
>
> If a new option must be added to the list or an existing option must be updated, contact your administrator to update the graphic tagging options.

- **DocBook** (for the DocBook standard or a similar XML standard)
- **DITA**
- **S1000D 4.x**

The text box displays the tagging used in the editing tool when a graphic is copied from Content Management and pasted to content in the editing tool.

5. Click **Apply**.
6. Click **OK** to close the **Preferences** dialog box.

Import graphics

To use graphics that are created in graphic editing programs, you must import them to Content Management. Imported graphics are placed in a folder according to how your user interface (UI) options are set in the rich client.

1. Choose **Tools→Import→Graphic**.
2. In the **Import Graphic Options** dialog box, do the following:

For this option	Do this
From Directory	Browse to and select the folder from which graphics are to be imported.
File names	Select the check box for each graphic file that you want to import. Tip: Click **Select All** or **Deselect All** to select or deselect all files listed.
Graphic Usage	Do one of the following: • Select the **Use Graphic Usages from Graphics Mapping** check box to use the graphic usages defined in the **ctm0GraphicUsagePref** preference.

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For this option	Do this
	• Select the graphic usages that you want to assign to this graphic option: Caution: Each graphic option of the same graphic file must have unique usages. For example, do not import piston.png and piston.gif both with the **VIEW** option. **If the graphic will be used for this purpose** / **Select this graphic usage** Icon in published output — **ICON** High-resolution graphic in printed output — **PDF** Graphic in a resolution appropriate for the printer where it will be printed — **PRINT** Small-scale image — **THUMBNAIL** Low-resolution image, typically for viewing only — **VIEW** Image to appear in a Web browser — **WEB**
Graphic Attribute Mapping	Select the appropriate graphic attribute defined by your application administrator.
Graphic Classname	Select one of the following: • **Graphic**—for non-S1000D content. • **S1000D Graphic**—for S1000D content.
Language	Select the languages for the graphics being imported, or choose **Multilanguage** if the graphics have no specific language associated with them. A separate graphic option will be imported for each language you choose. Note: For S1000D graphics, select the site master language. The S1000D standard does not require you to associate a language with graphics, and the sample S1000D

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For this option	Do this
	graphic attribute mapping does not support multiple languages for graphics.
Overwrite Mode	Select one of the following: Note: If you select neither overwrite mode, the graphic will be imported as a new graphic if a graphic option with the same **Original Imported Name** property and graphic usage does not already exist in the system. • **Skip existing** The graphics are not imported if they already exist in Content Management. • **Overwrite existing** If the graphics already exist in Content Management, they are overwritten. If you select **Overwrite existing**, select one of the following usage handling options: Tip: To view the usages associated with an existing graphic option, right-click the graphic option revision, and choose **View Properties**. Note: Edit, publish, and export functions always use the latest revision of graphic options. If you revise a graphic, the new revision appears in all content that references the graphic. If you want to change a graphic but you do not want the graphic updated in all content, you must import the changed graphic as a new graphic with a different name. • **Keep** The usages of the existing graphics are retained.

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For this option	Do this
	• **Merge** The usages of the existing graphics are retained, and the new usages selected for this import are added to the graphics. For example, if a graphic being imported already exists with the VIEW and WEB usages, and the selected usages in the **Import Graphic Options** dialog box are THUMBNAIL and ICON, the graphic is saved with the VIEW, WEB, THUMBNAIL, and ICON usages after the import. • **Overwrite** The usages of the existing graphics are removed and replaced by the usages selected in the **Import Graphic Options** dialog box.

3. Click **Finish**.

Preview a graphic

- Preview graphics in the following ways:
  - Select the graphic option or graphic option revision and open the **Summary** view. The graphic appears in the **Preview** area.
  - Right-click the graphic option revision, and choose **Show Content**.
  - Right-click the graphic option or graphic option revision, and choose **Open with→Image Preview**.

Insert a graphic into a topic

You can insert a **graphic option** reference into a topic that is open in the editing tool.

In the **Publication Structure** view, the graphic appears in the structure with an **Occurrence Type** of **Content Graphic Reference** or **Composable Graphic Reference**.

> Note:
>
> When you paste a graphic option into content and you save the content to the database, the content is decomposed and the graphic option filename is substituted with the graphic item, so

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that other graphic options can be used when the content is subsequently composed. The graphic tag that is pasted is dependent on the **Graphic Link Clipboard** preference.

If you save a topic with a graphic that does not exist in Teamcenter, a warning message appears indicating the graphic cannot be found. The next time you edit the topic the graphic name in the XML is appended with **.error**.

1. Search for the graphic.

2. Right-click the appropriate graphic option revision, and choose **Copy For Editor→Graphic Content**.

3. In the editing tool, right-click the valid position where you want to insert the graphic, and choose **Paste**.

   The graphic reference is inserted in the topic's XML, using the tag information from your Graphic Link Clipboard preference and the identifying information for the graphic file.

4. (Optional) To use a version of the graphic other than the current version, add the appropriate value to the version attribute in the editing tool.

Add a Lifecycle Visualization graphic to a topic

You can save 2D images or 3D models in Teamcenter lifecycle visualization so that they can be used as 2D graphics in print and online publications that are managed in Content Management. You insert the graphics into topics when they are open in the editing tool from Content Management.

If the 3D model changes, you can recapture the image in Teamcenter lifecycle visualization to update it in Content Management.

1. In Teamcenter, send a 2D image or 3D model to the standalone application viewer or the Lifecycle Viewer.

2. In Teamcenter lifecycle visualization, choose **File** tab→**Publish 2D graphic to Teamcenter Content Management**.

   Note:

   This option is available only if the graphic is stored in Teamcenter.

3. In the **Graphic Option** dialog box, do the following:

For this option	Do this
Name	Type a name for the graphic.
Graphic Usage	Do one of the following:

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For this option	Do this
	• Select the **Use Graphic Usages from Graphics Mapping** check box to use the graphic usages defined in the **ctm0GraphicUsagePref** preference. • Select the graphic usages that you want to assign to this graphic option: Caution: Each graphic option of the same graphic file must have unique usages. For example, do not use piston.png and piston.gif both with the **VIEW** option. **If the graphic will be used for this purpose** / **Select this graphic usage** Icon in published output. / **ICON** High-resolution graphic in printed output. / **PDF** Graphic in a resolution appropriate for the printer where it will be printed. / **PRINT** Small-scale image. / **THUMBNAIL** Low-resolution image, typically for viewing only. / **VIEW** Image to appear in a Web browser. / **WEB**
Graphic Attribute	Select the appropriate graphic attribute defined by your application administrator.
Graphic Classname	Select one of the following: • **Graphic**—for non-S1000D content. • **S1000D Graphic**—for S1000D content.
Language	Select the languages for the graphics being saved, or choose **Multilanguage** if the graphics have no specific language associated with them. A separate graphic option will be saved for each language you choose.

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For this option	Do this
	Note: For S1000D graphics, select the site master language. The S1000D standard does not require you to associate a language with graphics, and the samplesample S1000D graphic attribute mapping does not support multiple languages for graphics.
Overwrite Mode	Select one of the following: Note: If you select neither overwrite mode, the graphic will be saved as a new graphic if a graphic option with the same **Original Imported Name** property and graphic usage does not already exist in the system. • **Skip existing** The graphics are not saved if they already exist in Content Management. • **Overwrite existing** If the graphics already exist in Content Management, they are overwritten. If you select **Overwrite existing**, select one of the following usage handling options: Tip: To view the usages associated with an existing graphic option, right-click the graphic option revision, and choose **View Properties**. Note: Edit, publish, and export functions always use the latest revision of graphic options. If you revise a graphic, the new revision appears in all content that it is referenced in. If you want to change a graphic but you do not want the graphic updated in all

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For this option	Do this
	content, you must save the changed graphic as a new graphic with a different name. • **Keep** The usages of the existing graphics are retained. • **Merge** The usages of the existing graphics are retained, and the new usages selected for this save are added to the graphics. For example, if a graphic being saved already exists with the VIEW and WEB usages, and the selected usages in the **Graphic Options** dialog box are THUMBNAIL and ICON, the graphic is saved with the VIEW, WEB, THUMBNAIL, and ICON usages. • **Overwrite** The usages of the existing graphics are removed and replaced by the usages selected in the **Graphic Options** dialog box.

4. Click **Next**.

5. In the **Export Image** dialog box, adjust the settings as needed.

   Tip:

   A resolution of 72 DPI is suitable for images to display on a monitor (email and web pages). Use a resolution of at least 300 DPI for print content.

6. Click **Finish**.

   Note:

   If your organization uses watermarks, a watermark page may appear before you can click **Finish**.

The graphic is saved in Teamcenter.

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7. In Content Management, search for the graphic, and then move it to the folder where you want to store it.

8. Right-click the graphic option revision, and choose **Copy For Editor→Graphic Content**.

9. In the editing tool, right-click the valid position in the topic where you want to insert the graphic, and choose **Paste**.

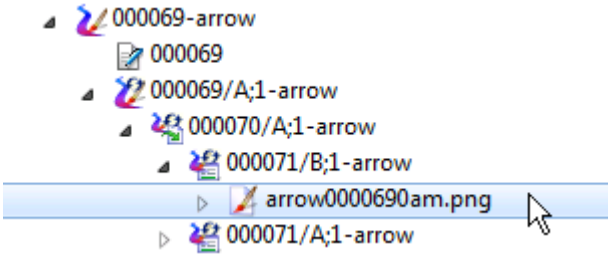
   The graphic reference is inserted in the topic's XML, using the tag information from your Graphic Link Clipboard preference and the identifying information for the graphic file.

Edit a graphic option

To edit a graphic, you must check it out and edit it in a graphic editing program. However, you can do this without re-importing the graphic.

> Note:
>
> Edit, publish, and export functions always use the latest revision of graphic options. If you revise a graphic, the new revision appears in all content that it is referenced in. If you want to change a graphic but you do not want the graphic updated in all content, you must **import** the changed graphic as a new graphic with a different name.

1. Double-click the graphic option image you want to edit.



   The graphic is checked out and opens in the default program for the file type.

2. Edit the graphic and save the changes.

3. Close the program you used to edit the graphic.

   The graphic is checked in.

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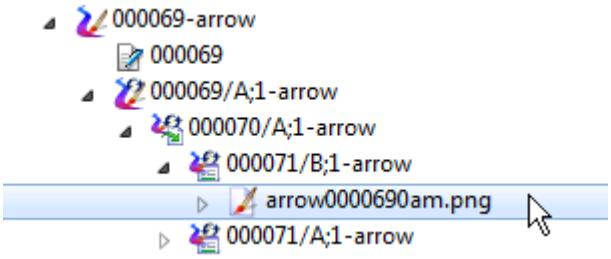
Update a graphic option using Named References

If a graphic changes or you want to change the graphic usage or graphic language, you can update the graphic option image using the **Named References** option. When you update a graphic option, it is updated in every topic in which it is referenced.

1. If you want to retain the original graphic option, select the graphic option revision, and choose **File→Revise**, and then follow these steps with the new graphic option revision.

   Edit, publish, and export functions always use the latest revision of graphic options. If you revise a graphic, the new revision appears in all content that it is referenced in.

2. Right-click the graphic option image you want to update, and choose **Named References**.



3. In the **Named References** dialog box, select the graphic name and click ✕ to delete the referenced file.

4. Click **Upload...**.

5. In the **Upload File** dialog box, browse to and select the new graphic file to replace the one you deleted.

6. Click **Upload**.

7. When the new referenced file appears in the **Named References** dialog box, click **Close**.

Update the graphic usage for a graphic option

Graphic usages are assigned to graphic options when you import them, but you can update the usages for an existing graphic option.

> Caution:
>
> Each graphic option of the same graphic item must have unique usages. For example, do not import piston.png and piston.gif both with the **VIEW** option.

1. Right-click the graphic option revision, and choose **Edit Properties**.

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2. Click **Yes** to confirm the checkout.
3. Click **All** to show all properties.
4. In the **Graphic Usages** box, edit the graphic usages.
5. Click **Save and Check-In**, and click **Yes** to confirm the check-in.

Perform a where-used search for a graphic option

A where-used search identifies all the publications that contain a specific graphic option.

1. Select the graphic option revision in the **Home** component view.
2. Select the **Impact Analysis** view.
3. Select **Used** from the **Where** option list, located in the upper left of the pane.

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23. Managing content in different languages

Content translation process

You can manage translations of individual topics or topics at any level in a publication structure. Managing a translation begins with creating a translation order, in which you choose the translation office that will perform the translation. Then you create a translation delivery to select the languages and create a .zip file to contain the content to be translated and any supporting files. You export the .zip file, and send it to the translator. When the content is translated and returned, you import it back into the system.

If necessary, you can use a Teamcenter workflow to manage translations according to your organization's business practices.

Once a translation exists in the system, you can work with a translated topic as you would any other topic. Each translated topic is related to the original topic in the master language. **Content versions** are used to determine if content has changed since it was translated.

When creating a translation delivery, you can choose to include the graphics associated with the topics to be translated.

> Note:
>
> Graphics are not managed the same way topics are during the translation process. Graphic options have an associated language property. When you edit and publish content in a language other than the master language, the graphics that match the language are selected. When a graphic does not exist for the language, the master language graphic option is used.

View the status of translation order content

You can use a report to review the status of a translated topic or publication to determine if translated content is at the same **content version** as the master language content. If the master language content has been edited since the translation order was created, the translation order content will have a different content version than the master language content.

1. In either the **Home** component view or the **Publication Structure** view, right-click the topic or publication revision that has the related translation order, and choose **Translation Status**.

2. In the **Browse** dialog box, browse to the location where you want to save the report, which is a .csv file, and click **Save**.

3. Open the .csv file in Microsoft Excel to review the translation statuses for the topics in the translation order.

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The report shows each topic's master language content version and translated language content version. The **In Sync?** column reports **Y** or **N** to indicate whether the two versions are out-of-sync. Out-of-sync versions indicate updates were made to the master language content since the translation order was created.

	A	B	C	D	E	F	G
1	Topic ID	Topic Title	Master Language Content Version	Translation ID	Language	Translated Language Content Version	In Sync?
2	X000012	Replacing the Battery	-1	000703	German	-1	Y
3	X000013	Types of Batteries	0	000704	German	-1	N
4	X000014	Tools Needed	-1	000705	German	-1	Y
5	X000015	Expected Battery Life	2	000706	German	-1	N

Create a translation order

The first step in managing the translation process in Content Management is to create a translation order, which provides information to the translator about the translation service being requested.

1. Do one of the following to display a dialog box to create the translation order:

   - In either the **Home** component view or the **Publication Structure** view, right-click the topic or publication revision to be translated, and choose **Translation Order**.

   - In the **Home** component view, select the topic or publication revision to be translated, and then either click **New Author Item...** , or choose **File→New→New Author Item**.

     In the **New Author Item** dialog box, expand **Complete List**, click **Translation Order**, and then click **Next**.

2. In the dialog box, do the following:

For this option	Do this
ID	Either type an ID for the translation order, or leave the box blank so that the next available item ID is automatically assigned.
Revision	Either type a revision for the translation order, or leave the box blank so that the next available revision is automatically assigned.
Name	Type a name for the translation order.
Order Title	Type a title for the translation order.
Order Description	Type a description of the translation order.

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For this option	Do this
Translation Office Reference	Select the translation office responsible for translating this order.
Request Delivery Date	Click the calendar button, and then select the date that you want the translation returned.

3. Click **Finish**.

4. (Optional) Submit the translation order to a Teamcenter workflow.

5. *Create the files for content delivery to a translator*.

Create the files for content delivery to a translator

To deliver content to a translator, you create a translation delivery. A translation delivery collects into a .zip file all the files that a translator needs to translate the content. When you create a translation delivery, the following objects are created in Content Management:

- Translation delivery, related to the translation order
- Translations, related to the translation delivery and the original topic
- A .zip file containing the content to be translated and any selected supporting files, which you can export and send to the translation company

1. Right-click the translation order revision and choose **Create Translation Delivery**.

2. In the **Create Translation Delivery** dialog box, do the following:

For this option	Do this
Includes	Select the items to include in the translation delivery .zip file: • **Include Graphics** Includes the graphics that are referenced in the content. • **Include Supporting Data** Includes the schemas with which the XML files can be validated. • **Include Published Content**

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For this option	Do this
	Includes related composed documents.
Delivery Modes	Select the items that you want to include in the translation delivery .zip file: • **Deliver Composed Topic** Includes the content in one composed document. • **Deliver Decomposed Topic** Delivers the content as separate topics. • **Deliver Out-of-Sync Topics Only** Delivers only topics that were modified since the last translation. (The content version of the translated topic is not current with the master language version and the content version is greater than **-1**.) When you select this option, the topics must be delivered decomposed, so you cannot select this option along with the **Deliver Composed Topic** option. You can **view the status of translation order content** to determine if the content has out-of-sync topics. • **Deliver Topics Already Out for Translation** Includes all out-of-sync topics, even those that have already been sent for translation. If this is not selected, only the topics that have not yet been sent for translation will be included. This option is only available when you select the **Deliver Out-of-Sync Topics Only** option.
Available Languages	Select each language you want the content translated to, and then click to move the languages to the **Selected Languages** list.
Selected Languages	Select each language, and then select **Review** next to each language that you would like to flag for a review when translated content is returned.

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3. Click **Finish**.

   The **Delivery Type** property for the translation delivery is set to **Submittal**.

4. *Export the translation delivery*.

Export the translation delivery

You export the translation delivery .zip file to a local or network drive, so that you can send the files to be translated to the translator.

1. Select the translation delivery revision, and choose **Tools→Export→Translation**.

2. In the **Browse** dialog box, browse to the location where you want to save the .zip file, and click **Save**.

3. Send the .zip file to the translation office for **translating**.

Tasks performed by the content translator

When a translator receives the translation delivery as a ZIP file, it contains the following:

- A .txt file listing the topics to be translated and the languages they are to be translated in.
- The **...original** folder containing the topics (as XML files) to be translated in the master language.
- The **...translated** folder as a placeholder for the translated topics.
- The **...translationSource** folder containing the topics to be translated.
- The **...supportingData** folder containing the schemas with which the XML files can be validated.
- The **...graphics** folder containing the graphics referenced in the content, if graphics were included in the translation order when it was created.

The translation process is as follows:

1. The translators translate the topics in either the **translated\decompose** or the **translated\compose** folder. If both the **decompose** and **compose** folders were included in the delivery, they delete the one that they are not using.

   The topics are edited using an editing tool. These files may be validated with the respective schemas included in the translation order.

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2. When the translation of the files is completed, they create a ZIP file with the same organization structure as the original ZIP file and with the translated content in the appropriate objects and folders.

3. Once completed, the send the ZIP file back to the appropriate Content Management user.

Import translated content

When you receive translated files from the translator, you import the translated data into Content Management. The translations can then be tested by previewing or publishing them in the appropriate language.

1. When you receive a translation from a translator, save the attached .zip file to a local or network drive.

   > Note:
   >
   > The .zip file from the translator must contain the original folder structure of the translation delivery and the translations results contained in the **translated** folder, as described in *Tasks performed by the content translator*.

2. Choose **Tools→Import→Translations**.

3. In the **Receive Translations** dialog box, click ... to browse to and select the folder containing the .zip file you received from the translation office.

4. In the **Translation zip files** box, select the check box for each .zip file you want to import.

   > Tip:
   >
   > Click **Select all** or **Deselect all** to select or deselect all files listed.

5. Click **Finish**.

   The translations are updated with the translated content, and the **Translation Received** property on the translations is set to **TRUE**. Also, a new translation delivery object is created with the **Delivery Type** property set to **Delivery**. A check mark appears next to received translations.

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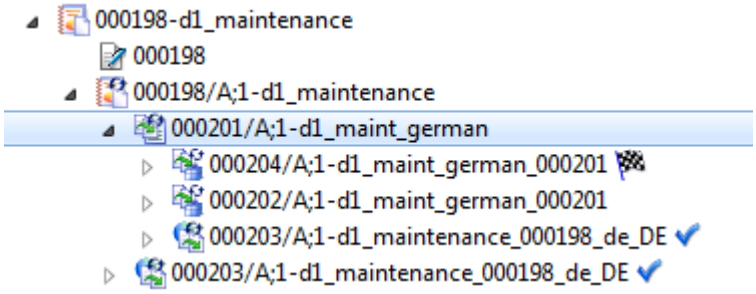

Edit a translation topic

You can edit a translation topic before you send it the translator (in the master language) or after it is received from the translator and imported to Content Management (in the translated language). Once you save and check in your edits, the **Content Version Reference** on the translation is set to the **Content Version** of the master language topic.

> Caution:
>
> If you edit translation content after it is sent to the translator but before it is returned and imported, once you import the translated content, any edits you made to the source will be overwritten.

1. In the **Home** component view, right-click the translation revision, and choose **Edit→Edit Translation**.

2. In the **Check-Out** dialog box, click **Yes**.

   The topic opens with the editing tool and is saved in a local folder. The topic appears as checked out , and in edit mode . The **Teamcenter CMS** menu appears in the editing tool's menu bar.

3. In the editing tool, edit the content as necessary, as the schema structure allows.

4. When you are done editing the topic, do one of the following:

To do this	Do the following	For this result
Save your changes and close the file.	Do one of the following: • In the editing tool, choose **Teamcenter CMS→Save and Close**. • Use the editing tool's options for saving files, and then in the **Home** component view, right-	The editing tool closes the file, the edited file is updated in the database, and its content version reference is set to the **content version** of the master language topic.

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To do this	Do the following	For this result
	click the translation revision, and choose **Edit→Save and Close Edit**. Then right-click the translation revision, and choose **Check-In/Out→Check In**.	
Close the file without saving your changes.	Do one of the following: • Choose **Teamcenter CMS→Close**. • In the **Home** component view, right-click the translation revision, and choose **Edit→Cancel Edit**. Then right-click the translation revision, and choose **Check-In/Out→Cancel Checkout**.	The editing tool closes the file, the file remains unchanged in the database.

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