

Customizing Technical Documents

It is possible to customize Technical Documents to suit business requirements. Most customizations include modifications to the **tp_Block** ItemType.

The screenshot shows the configuration interface for the **tp_Block** ItemType. The top section contains various settings grouped into categories like Name, History Template, Versioning, Search, and Implementation Type. The bottom section is a table with properties for the ItemType.

Name	Label	Data Type	Data Source	Len	Prec	Scale	Requi	Unique	Indexed	Hidden	Hidden2	Alignment	Width	Sort Or	Keyed Name	Order By
classification	Type	String		512			☐	☐	☐	☐	☐	Left	200	3968		
condition	Condition	Text					☐	☐	☐	☒	☒	Left		3328		
config_id		Item	tp_Block				☒	☐	☐	☒	☒	Left		2688		
content	content	Multilingual String		4000			☐	☐	☐	☒	☒	Left		128		
created_by_id		Item	User				☒	☐	☐	☒	☒	Left		640		
created_on		Date					☒	☐	☐	☒	☒	Left		512		

Possible customizations include:

- **Specifying a class structure:** Aras Technical Documentation Application includes the ability to specify XML schemas and CSS styles that apply to specific classes. It is possible to specify a class structure for **Technical Documents** to fit business requirements.
- To specify a required class structure, open the **tp_Block** ItemType item for editing and click the **Class Structure** button.
- **Changing Permissions and Life Cycles:** The Aras Technical Documentation solution comes with default Life Cycle and a set of Permissions. These may be edited to suit business requirements.
- Permissions and Life Cycles can be changed on the **tp_Block** ItemType.



- **Adding properties:** It is possible to add properties to Technical Documents to suit business requirements.
- Required properties should be added to the **tp_Block** ItemType.
- **Adding items that a Technical Document can reference:** It is possible to add/edit items that a **Technical Document** can reference. The list of allowed ItemTypes is controlled by the **tp_Item** Poly Item.

To add items that a **Technical Document** can reference, add the appropriate ItemType to **tp_Item** as a Poly Source.

The screenshot displays the configuration interface for the **tp_Item** ItemType. The top section contains various configuration options:

- Name:** tp_Item
- Singular Label:** Document Item
- Plural Label:** Document Items
- Versioning:** Versionable (checkbox), Discipline (Automatic), Revisions (Default)
- Search:** Auto Search (checkbox), Default Page Size, Max Records
- Permissions:** Unlock On Logout, Dependent, Is Relationship, Enforce Discovery (checked), Use Src Access, Allow Private Permissions (checked)
- Implementation Type:** Single Item, Poly Item (selected), Federated Item
- Enable for Secure Social:** (checkbox)

The bottom section shows a table of properties for the **tp_Item** ItemType:

Name	Label	Data Type	Data Source [...]	Len...	Preci...	Scale	Requi...	Unique	Indexed	Hidden	Hidden2	Alignment	Width	Sort Or...	Keyed Name ...	Order By
classification	Classification	String		512			☐	☐	☐	☒	☒	Left		256		
config_id		Item	tp_Item				☒	☐	☐	☒	☒	Left		2816		
created_by_id		Item	User				☒	☐	☐	☒	☒	Left		768		
created_on		Date					☒	☐	☐	☒	☒	Left		640		
css		Text					☐	☐	☐	☒	☒	Left		2432		
current_state		Item	Life Cycle State				☐	☐	☐	☒	☒	Left		1408		
operation		Text					☐	☐	☐	☒	☒	Left		768		

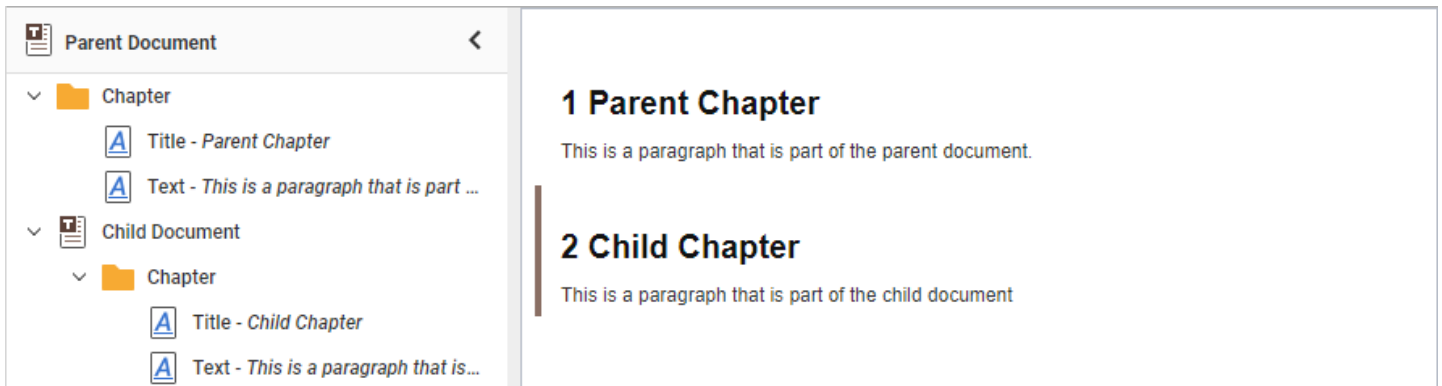
Important

Adding new ItemTypes to **tp_Item** may also require updates to **Content Generator** methods. See [Content Generation](#) for more details.

Enabling the Ability to Edit Child Documents

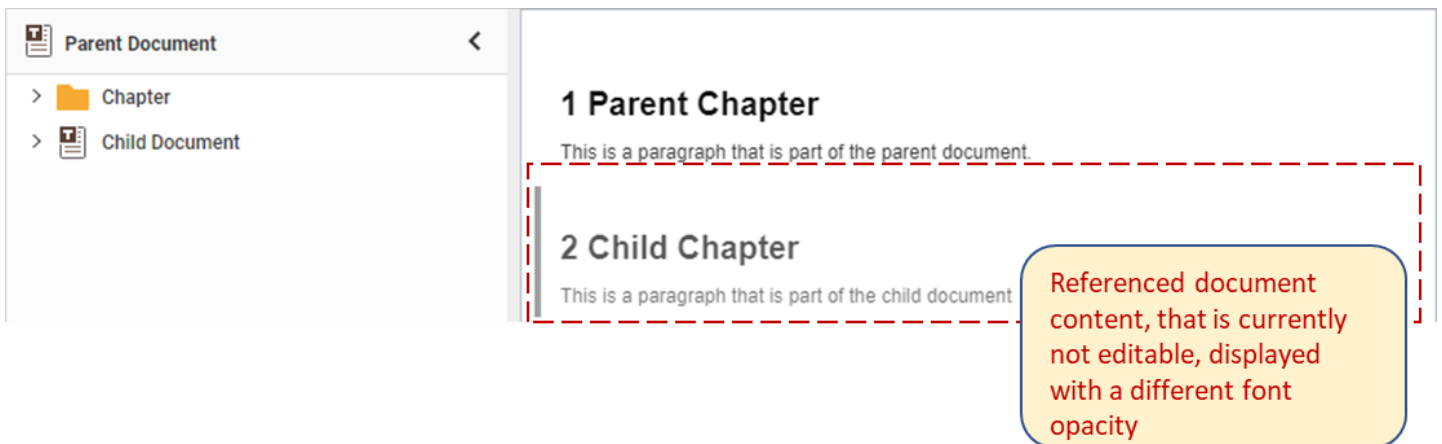


By default, referenced document content within a *parent* technical document is not editable. However, it is possible to enable editing for this *child* content directly. Doing so will allow authors to edit all document content, that they have the access rights to, within a single editor instance regardless of whether this content exists within a separate Technical Document Item.



Example Technical Document with Referenced Document Content

In the example figure, a Technical Document – Parent Document – includes referenced document content – Child Document. Referenced document content is distinguished visually by a solid bar displayed to the left of all content within the referenced document. In addition, when referenced document is editable, the content will be displayed in the same font color and opacity as all other content that exists within the opened Document. By contrast, when referenced document content is not editable, it will be displayed in a different opacity, which appears to the user as a slightly different color.



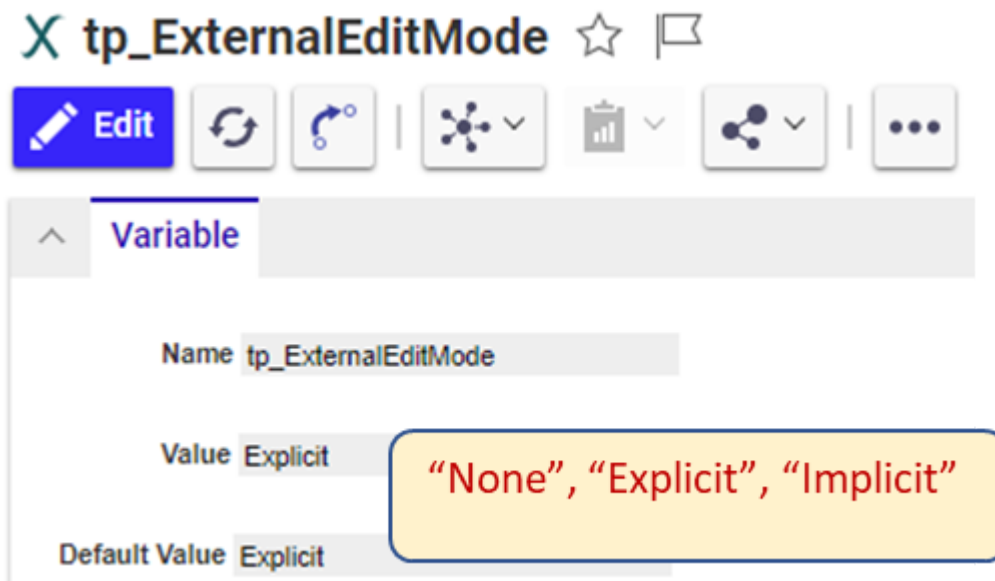
Example Technical Document with Non-editable Referenced Document Content

Edit Modes

Enabling external editing can be done in one of 2 Modes: Implicit or Explicit. Implicit Edit Mode will allow an author to edit referenced content without the need to *explicitly* lock that content for editing. Explicit Edit Mode will require an author to lock that content before any edits are made. Referenced Documents would then need to be unlocked by the author when changes are completed to make that Technical Document Item available for other users to edit. The Edit Mode will apply to all Technical Documents, for any Document Type.

Configuring an Edit Mode

The Edit Mode for a Technical Document is determined by the value of the Variable with name '**tp_ExternalEditMode**'. By default, the value of this Variable is set to '**None**', which means that no referenced document content can be edited. Setting the value to '**Explicit**' enables the Explicit Edit Mode. Setting the value to '**Implicit**' enables the Implicit Edit Mode. Users will need to re-login for any changes to take effect.



tp_ExternalEditMode Variable Setting

Update Presentation Configuration

In addition to setting the Edit Mode Variable, it's important to check the Presentation Configuration for the **tp_Block** ItemType to ensure that the proper Method Logic is set when saving a Technical

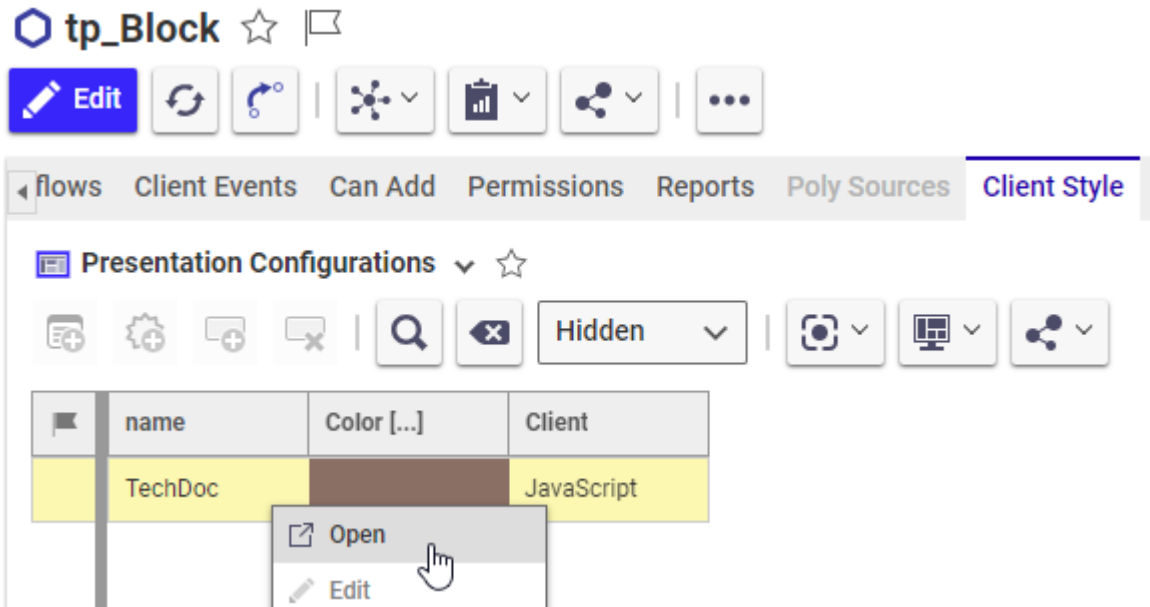
Document. This functionality is necessary for Implicit Mode to properly warn the Author when changes have been made to referenced content after the content within the opened document was last opened or saved.

Important

Without the Presentation Configuration settings, Authors who save changes to referenced content in Implicit Mode will overwrite any changes made by another user without any warning.

Changes to the Presentation Configuration must be done by an Administrator. To check or ensure that the proper Presentation Configuration changes are set:

1. Open the tp_Block ItemType and select the Client Style Tab



2. Open the related 'TechDoc' Presentation Configuration
3. Set, or ensure, the TDF.SaveItem CUI Command as shown

^ Presentation Configuration

Color

Name

TechDoc

^ Command Bar Section cui_PresentConfigWinSection

Presentation Command

Commands

Hidden

	Name	Execute [...]	Can Execute [...]	Location [...]	Command Alias [...]
	TDF.SaveItem	cui_command...	cui_command...		SaveItem

Make sure that the Name and Command Alias are set as shown.

