

# User Interface

Authoring and viewing Technical Document content is done using the Technical Document Form.

The window for Items of type Technical Document has two views: Form and Editor. These Views are accessed using a sidebar menu displayed in the left margin.

The screenshot shows the 'Form' view of a Technical Document. At the top is a menu bar with 'File', 'Edit', 'Views', 'Actions', 'Reports', 'Tools', and 'Help'. Below the menu bar is a toolbar with icons for 'Create a New Item', 'Save Item', 'Delete Item', 'Refresh Item', 'Printable View', 'Export To Excel', 'Export To Word', 'Lock Item', 'Unlock Item', 'Undo Changes on Item', and 'Promote Item'. The main area is divided into two sections. The top section has three columns: 'Document Number' (containing 'TD-UG-Chapter3'), 'Revision' (containing 'A'), and 'State' (containing 'In Work'). The bottom section has a 'Name' field (containing 'Technical Documentation Creating Content') and a 'Type' field (containing 'User's Guide').

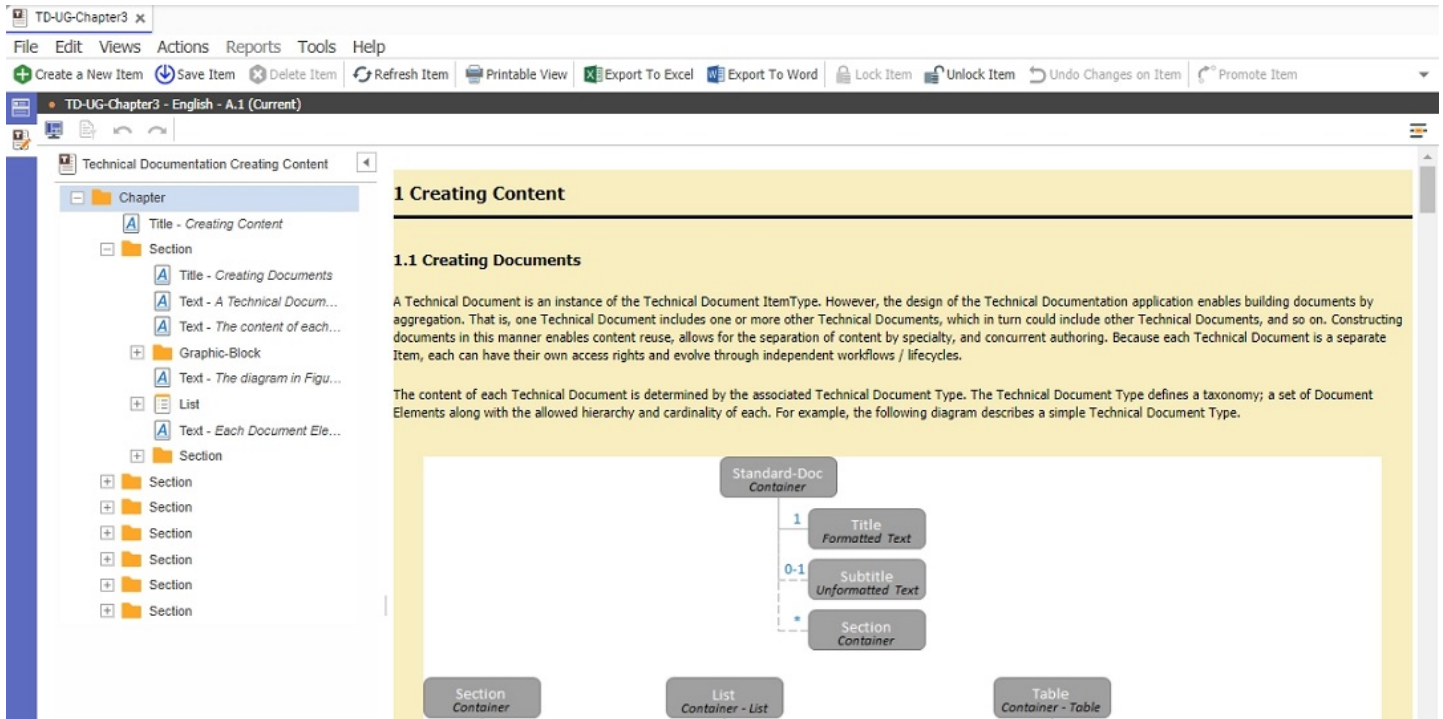
Click the Form Button null in the sidebar menu to display the Form. The Form shows all the properties of the Technical Document that have been exposed. If there are any related Items added to the Technical Document, they appear as separate tabs in the lower portion of the window as is usual for ItemType Forms.

## Important

Relationship Item Tabs are turned off by default. Update the ItemType to display Relationship tabs as required.

Click the Editor Button null in the sidebar menu to display the Technical Documentation Framework.



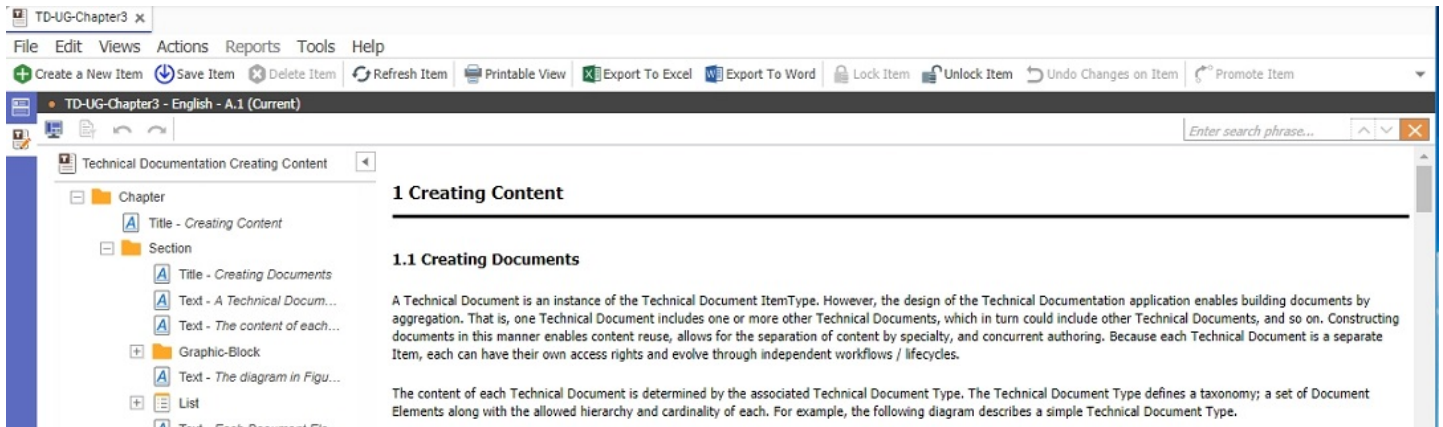


The Technical Documentation Framework contains three main panes: Toolbar, Navigation Pane, and the Content Viewer/Editor. The toolbar contains various buttons to invoke separate functions for viewing and content editing. The buttons exposed on the toolbar are context-sensitive based on the currently selected Document Element. The navigation pane (sometimes called Structure Tree) displays individual 'nodes' each representing the hierarchy of Document Elements that comprise the document. Selecting the '+' icon at various levels expands the tree by displaying all the *child* Document Elements. Selecting a node in the navigation pane causes the corresponding content associated with that node to be scrolled and highlighted in the Content Viewer/Editor.

The Content Viewer/Editor displays the content of the document and represents the canvas on which content is added and modified by the author. Selecting content in the editor/viewer causes the corresponding Document Element node in the navigation pane to be scrolled and highlighted.

## Searching for Text

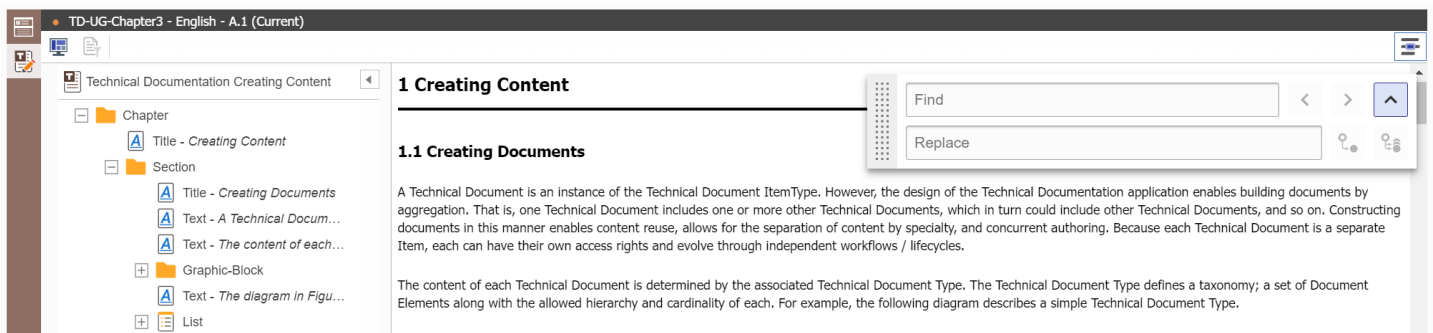
You can search for words or phrases within the document by clicking the icon null that appears in the upper right corner of the document window. The icon is replaced by a search box. Enter your search term in the box and press Enter. If the search term you specified is contained in the document, all instances of the term appear in a different font color.



You can scroll through the document by clicking on the up/down arrows in the Search box. The currently active match is highlighted as you scroll. The search box also displays the ordered position of the highlighted search term. If the document does not contain the search term you specified, the phrase “no matches are found” is displayed.

## Replacing Text

To replace text, select the down arrow in the upper right corner of the Search/Replace dialog. Doing so will expose the Replace portion of the dialog. Select ‘Replace Next’ icon null to step through the searched text results and replace with the text entered in the ‘Replace’ text box. Select the Replace All icon null to replace all found search strings in the document. Note that only editable portions of the document can have the text updated.

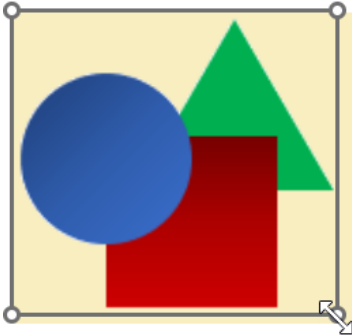


## Resizing Images

Images in a Technical Document can be resized dynamically using the left mouse button while selecting/dragging the image ‘resize handles’. Resize handles are shown in the Editor when the document is in Edit mode and the Image Document Element is selected.

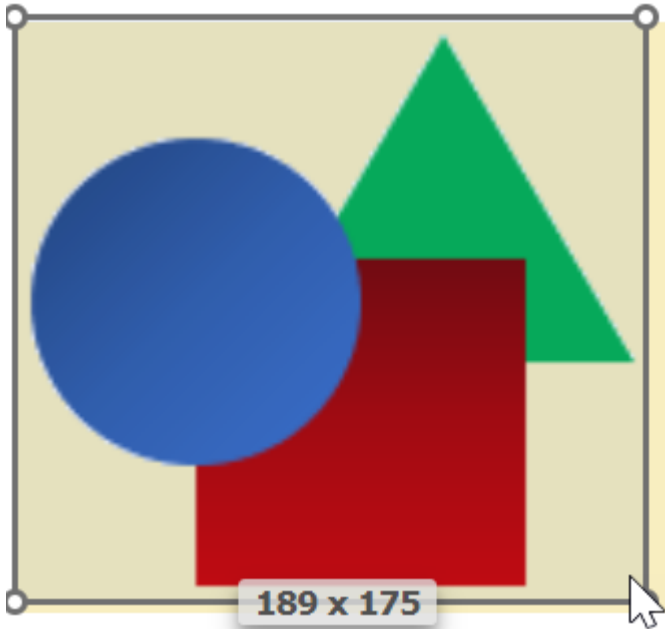


Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna. Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci. Aenean nec lorem.



In porttitor. Donec laoreet nonummy augue. Suspendisse dui purus, scelerisque at, vulputate vitae, pretium mattis, nunc. Mauris eget neque at sem venenatis eleifend. Ut nonummy. Fusce aliquet pede non pede. Suspendisse dapibus lorem pellentesque magna. Integer nulla. Donec blandit feugiat ligula. Donec hendrerit, felis et imperdiet euismod, purus ipsum pretium metus, in lacinia nulla nisl eget sapien.

Resize handles are small, circular icons rendered at each corner of a selected image. When the mouse is placed over any of the resize handles, the cursor image is switched to a two-sided arrow signifying that if the user presses and holds down the left mouse button while dragging, the image size will be dynamically updated. As the user drags the mouse, the actual image size (height and width values, in pixels) is displayed below the image.

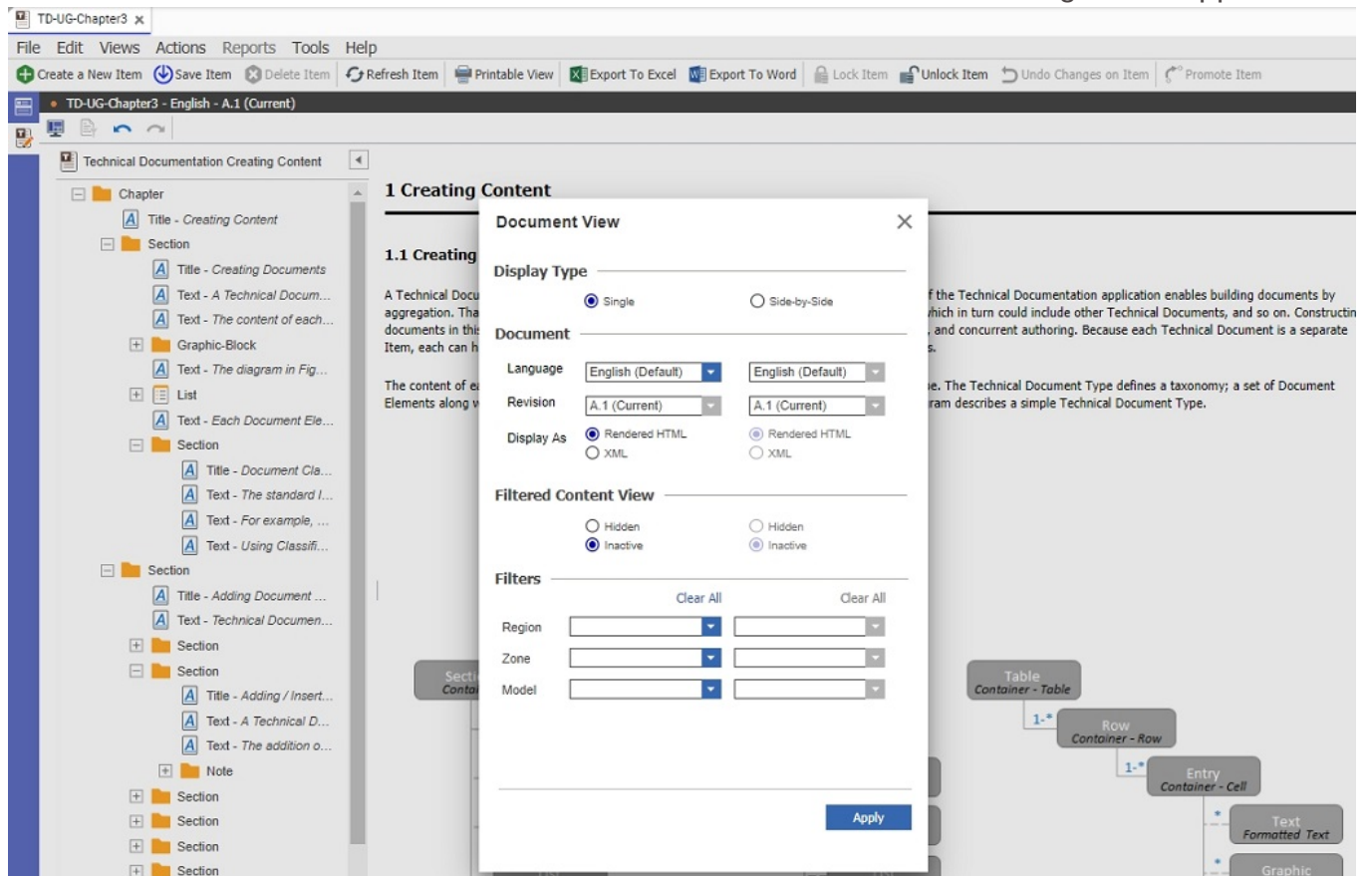


Lifting the left mouse after dragging to resize will result in the image being resized. Note that the image is resized dynamically as the user drags the mouse and image size updates retain the original aspect ratio. The updated image size will be saved with the document content. The system will not allow a resize in either dimension of less than 10 pixels.

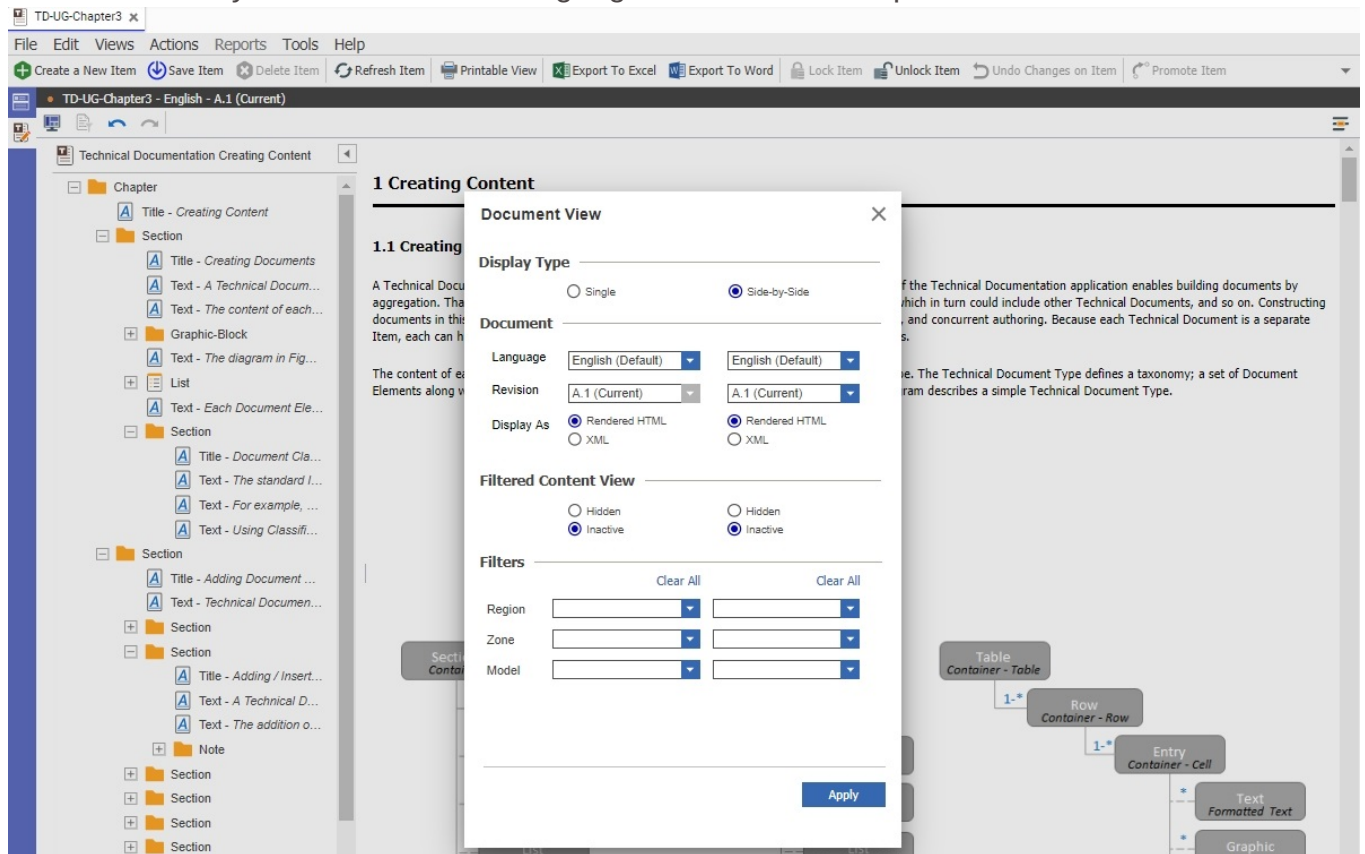
## Viewing Documents Side-by-Side

You can view different versions of the same document simultaneously using the following procedure:

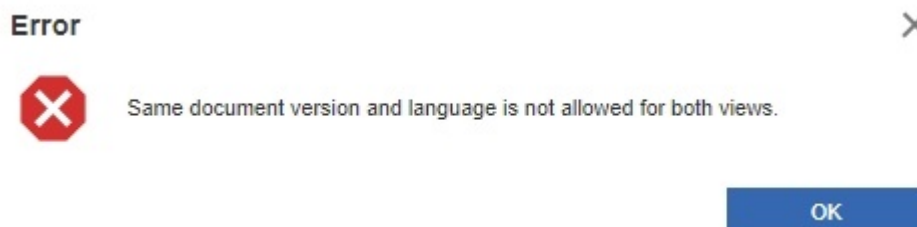
1. Click the Document View icon null in the toolbar. The Document View dialogue box appears.



2. Click the Side-by-Side button. The Language and Revision dropdowns are activated.

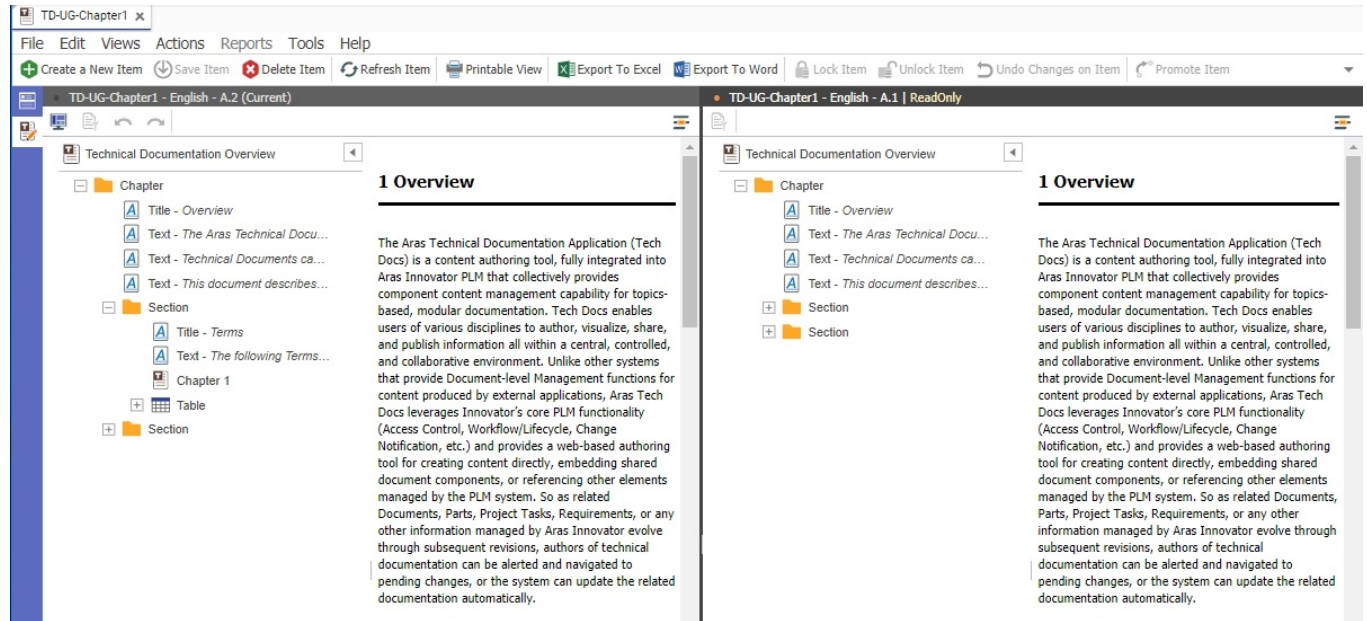


3. Select the Language and the document version for both documents. You cannot specify the same document version and language for both documents. If you do an error message similar to the following appears:



4. Specify how the documents appear by selecting either **Rendered HTML** or **XML**. You can also select the filters to use for each document.

5. Press **Apply**. Both documents appear side-by-side.



The left side contains the document that you opened first in the main grid. The document that appears on the right is the one you selected in the Document View dialog box.

You can only edit the document that appears on the left side view which is marked as Current. The document on the right side is marked as ReadOnly. The context menus for each document are different. The context menu for the editable document displays the following items:

- Add
- Remove
- Copy
- Cut
- Convert to External
- Change Condition

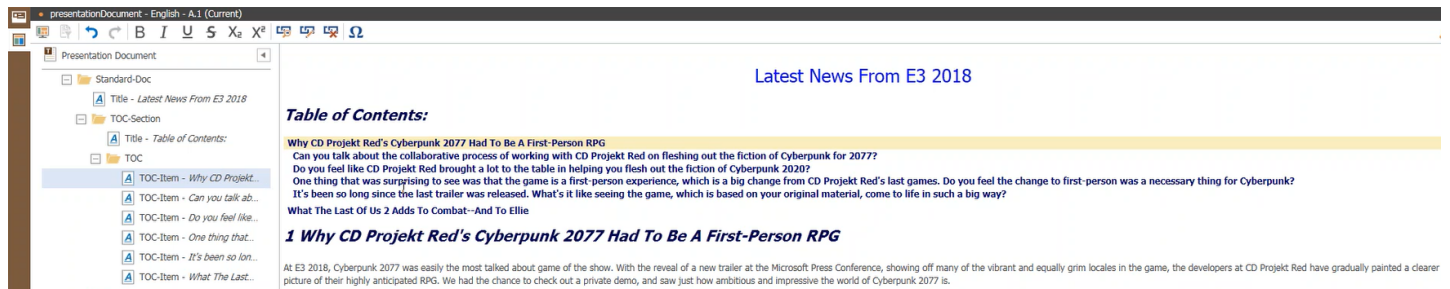
The context menu for the read-only document displays the following items:

- Copy
- View Condition

## Generating a Table of Contents



The Content Generator enables you to automatically generate a Table of Contents using the TOC-Section Document Element. The Content Generator for the TOC child Document Element iterates through a document and adds all the Chapter and Section document headings to the Table of Contents as shown here:



## Important

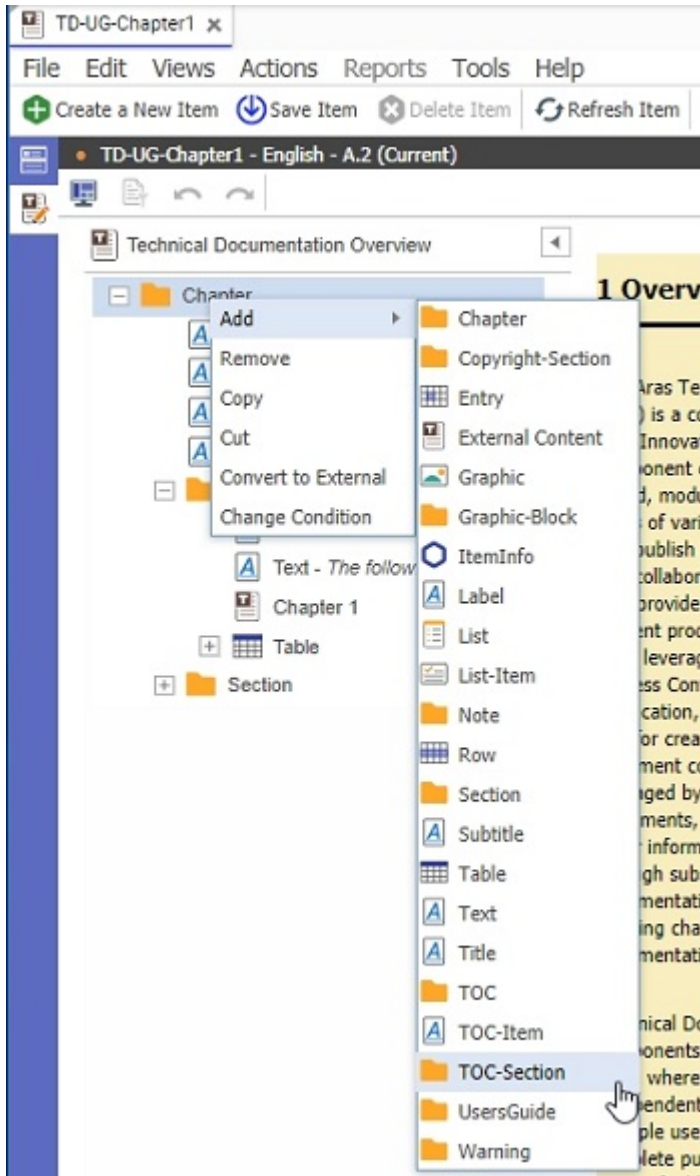
You can customize the number of headings displayed in the TOC by editing the TOC Item. For more information, refer to the Aras Innovator 40 – TDF Administrator's Guide.

## Adding a Table of Contents

Use the following procedure to add sections to the Table of Contents:

6. Right-click the Standard Doc folder in the Navigation pane. Select **Insert>TOC-Section** from the context menu.





A TOC-Section folder appears in the Navigation pane.

Select the Title Element and enter a title for the Table of Contents, as shown here:

TD-UG-Chapter1 x

File Edit Views Actions Reports Tools Help

Create a New Item Save Item Delete Item Refresh Item Printable View Export To Excel Export To Word Lock Item Unlock Item Undo Changes on Item Promote Item

TD-UG-Chapter1 - English - A.2 (Current)

Technical Documentation Overview

- TOC-Section
  - Title - Table of Contents
- Chapter
  - Title - Overview
  - Text - The Aras Technical Docu...
  - Text - Technical Documents ca...
  - Text - This document describes...
- Section
- Section

## Table of Contents

### 1 Overview

The Aras Technical Documentation Application (Tech Docs) is a content authoring tool, fully integrated into Aras Innovator PLM that collectively provides component content management capability for topics-based, modular documentation. Tech Docs enables users of various disciplines to author, visualize, share, and publish information all within a central, controlled, and collaborative environment. Unlike other systems that provide Document-level Management functions for content produced by external applications, Aras Tech Docs leverages Innovator's core PLM functionality (Access Control, Workflow/Lifecycle, Change Notification, etc.) and provides a web-based authoring tool for creating content directly, embedding shared document components, or referencing other elements managed by the PLM system. So as related Documents, Parts, Project Tasks, Requirements, or any other information managed by Aras Innovator evolve through subsequent revisions, authors of technical documentation can be alerted and navigated to pending changes, or the system can update the related documentation automatically.

Technical Documents can be composed of individual components (sections, paragraphs, illustrations, tables, etc.), where each component can change independently; and optionally created/managed by multiple users. The aggregated information forms the complete published document. This Structured Content is specified by a user-defined data model that identifies the elements of each component, their relationships and cardinality, and any restrictions on data type and value limitations. The built-in authoring User Interface directs the author as to the types of document elements that can be inserted, constantly validating the document as it is created. Candidate documents for release can be routed through workflow and published on final acceptance.

This document describes the functions and features of the Technical Documentation application. It is meant to be companion to the Technical Document Author ([Section 5.2.1](#)) as they use the software to author technical content. Section 1 provides an overview of the features of the software. [Section 2](#) describes the User Interface. [Section 3](#) describes how you use the software to create technical content. [Section 4](#) describes how to publish/export content in various formats. [Section 5](#) discusses how Technical Documents are managed in the Innovator environment.

#### 1.1 Terms

The following Terms are used throughout this document:

| Term                         | Definition                                                                                                                                                                                                     |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Business Object              | Refers to any Item in Innovator that contains information, which may be referred to in a Technical Document.                                                                                                   |
| Cascading Style Sheets (CSS) | Industry standard text-based format for controlling the position, color, size, etc. of web-based content. It is used by the Technical Documentation application to control the format of HTML and PDF content. |
| Content Filters              | Metadata (name/value pairs) that are defined by the Technical Document Administrator and chosen by the Technical Document Author to characterize Document Elements within a Technical Document.                |

Right-click the Title Element and select **Add>TOC** from the context menu to add entries to the Table of Contents.



presentationDocument - English - A.1 (Current)

Standard-Doc

- Title - Latest News From E3 2018

TOC-Section

- Title - Table of Contents:

TOC

- TOC-Item - Why Cl...projekt...
- TOC-Item - Can you talk ab...
- TOC-Item - Do you feel like...
- TOC-Item - One thing that...
- TOC-Item - It's been so lon...
- TOC-Item - What The Last...

D-00005 x

File Edit Views Actions Reports Tools Help

D-00005 - English - A.1 (Current)

Overview

- TOC-Section
  - Title - Table of Contents
- TOC
  - TOC-Item - Overview
  - TOC-Item - The Aras Technic...
  - TOC-Item - Creating Technic...
  - TOC-Item - Generating a Tabl...
- Chapter
  - Title - Overview
  - Text - The Aras Technical Docume...
  - Text - Technical Documents can b...
  - Text - This document describes ho...

## Table of Contents

**Overview**

The Aras Technical Documentation Application

Creating Technical Documents

Generating a Table of Contents

### 1 Overview

The Aras Technical Documentation Application (Tech Docs) is a content authroing tool, fully integrated into Aras Innovator PLM that collectively provides component content mamangement capability for topics-based, modular documentation. Tech Docs enables users of various disciplines to author, visualize, share, and publish information all within a central, controlled, and collaborative environment. Unlike other systems that provide Document-level Management functions for content produced by external applications, Aras Tech Docs leverages Aras Innovator's core PLM functionality (Access Control, Workflow/Lifecycle, Change Notification, etc.) and provides a web-based authoring tool for creating content directly, embedding shared document components, or referencing other elements managed by the PLM system. So as related Documents, Parts, Project tasks, Requirements, or any other information managed by Aras Innovator evolve through subsequent revisions, authors of technical documentation can be alerted and navigated to pending changes, or the system can update the related documentation automatically.

Technical Documents can be used for a variety of things.

This document describes how to create Technical Documents.

