

# Composite Document Generation

- CD9 -



## ***Installation Guide – V1***

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**BPA Delivery 6 for V5R19 (V5.6)**

# Modification Tracking

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Version	Date	Done by	Modification
	15 Sep 2008	NJZ	Document creation
D6W42.3	15 Oct 2008	NJZ/CBZ	Document verification
D6W48.1	24 Oct 2008	NJZ/CBZ	Update screen shots D6-SP2 delivery

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# 1. Introduction

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This document describes the installation procedure for the BPA Composite Document Generation.

This document is divided into the following sections:

- Composite Document Generation installation
- Configuring Composite Document Generation
- Modifying or uninstalling Composite Document Generation

## 1.1. Related Documentation

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- Collaborative Systems Engineering – License Use Management (CSE\_LicenseUseManagement\_R19D6.doc)
- Collaborative Systems Engineering – Data Model Documentation (CSE\_DataModel\_Documentation\_R19D6.doc)
- ENOVIA SmarTeam – V5R18 Hardware and Software Requirements
- ENOVIA SmarTeam - Editor Installation Guide
- ENOVIA SmarTeam - Editor Administrator Guide
- ENOVIA SmarTeam - Editor User Guide
- ENOVIA SmarTeam - Foundation Installation Guide
- ENOVIA SmarTeam - Foundation Administrator Guide
- ENOVIA SmarTeam - Foundation User Guide

### 1.1.1. Glossary

Name	Definition
BPA	Business Process Accelerator
PDIR	Program Directory
CSE	Collaborative System Engineering

Table 1 - Glossary

## 1.2. Prerequisite for Composite Document Generation Installation

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### 1.2.1. Hardware requirements

ENOVIA SmarTeam installation is the main prerequisite for CSE installation. Refer to 'ENOVIA SmarTeam V5R18 Hardware and Software Requirements' documentation to obtain all pre requisites regarding SmarTeam.

## 1.2.2. *Software requirements*

ENOVIA SmarTeam installation is the main prerequisite for CSE installation. Refer to 'ENOVIA SmarTeam V5R18 Hardware and Software Requirements' documentation to obtain all pre requisites regarding SmarTeam.

The BPA Composite Document Generation is based on **ENOVIA SmarTeam's** advanced object oriented database capabilities and provides the overall combination of classes, objects, properties, methods, parent-child and peer to peer relationships supporting advanced Requirements Management processes.

The BPA Composite Document Generation requires the installation of the following ENOVIA SmarTeam components:

### - ENOVIA SmarTeam SEG + Word integration

#### Information

The installation of the CD9 BPA requires that the following software to be installed:  
Operating Systems

- Microsoft Windows XP Professional SP2

Software Requirements:

- Microsoft Office 2003 SP2
- ENOVIA SmarTeam V5R19 GA minimum - SmarTeam Engineering configuration (SEG) with SmarTeam R19 compatible DataBase
- By default ENOVIA SmarTeam V5R18 SP5 - SmarTeam Engineering configuration (SEG) with SmarTeam R18 compatible DataBase
- Shall be installed for CE9 and CP9 configurations

## 2. Composite Document Generation installation

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### 2.1. *Before Installing*

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#### Information

If a previous version of Composite Document Generation BPA has been installed on the client with the Inno Setup installation package (BPA CDG Delivery 1 or Delivery 2), you have to uninstall manually this version before to proceed to the installation of BPA CDG delivery 6.

#### Notes

If you want to install Composite Document Generation BPA, you must install ENOVIA SmarTeam Foundation and Editor **first**.

Also, VC Redistributable should be installed first. The patch is given in User package in ToolKits.

When installing, make sure that you have administrator privileges.

Close all other applications on the computer before proceeding with the installation.

### 2.2. *Composite Document Generation package description*

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#### 2.2.1. *User package*

The user package is composed of these folders:

- Documentation (PDF documentation)
- SetUp
- ToolKits

#### 2.2.2. *SetUp files*

The Composite Document Generation package is including:

- The composite document code
- The integration and demonstration templates (WORD)
- The application's icons and adds-on.

The setup is an InstallShield setup file containing the BPA code (dll, scripts).

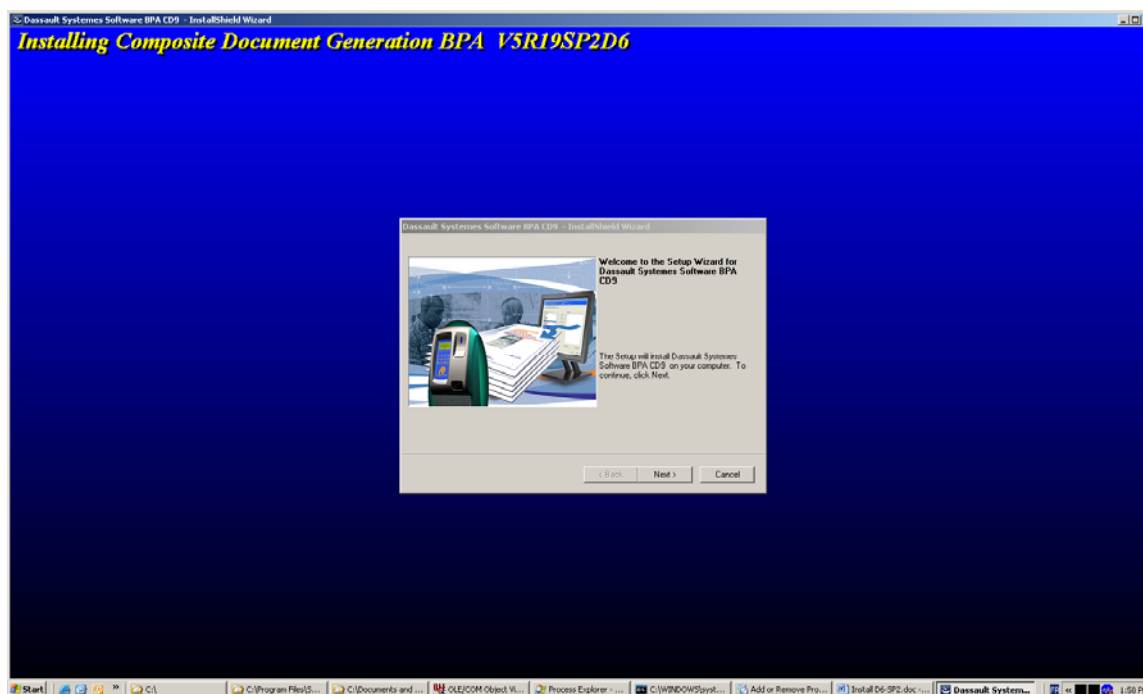


### 2.2.3. ToolKits file

- The ToolKits folder contains VC Redistributable.

## 2.3. Composite Document Generation Installation

1. Launch the CD9.exe file



2. After reading the contents of the Welcome window, click Next to proceed to the next window, Customer Information.

#### Note:

At any stage of the installation you may click on the Back button to review and modify your previous selection. Clicking cancel will give you the option to abort the installation, without modifying anything on the installed computer.

**Dassault Systemes Software BPA CD9 - InstallShield Wizard**

**Customer Information**  
Please enter your information.

Please enter your name and the name of the company for which you work.

User Name:  
Dassault Systemes

Company Name:  
Dassault Systemes


InstallShield

< Back   Next >   Cancel

### 3. Destination Folder

**Dassault Systemes Software BPA CD9 - InstallShield Wizard**

**Choose Destination Location**  
Select folder where setup will install files.


 Install Dassault Systemes Software BPA CD9 to:  
 C:\Program Files\SMARTTEAM

Change...

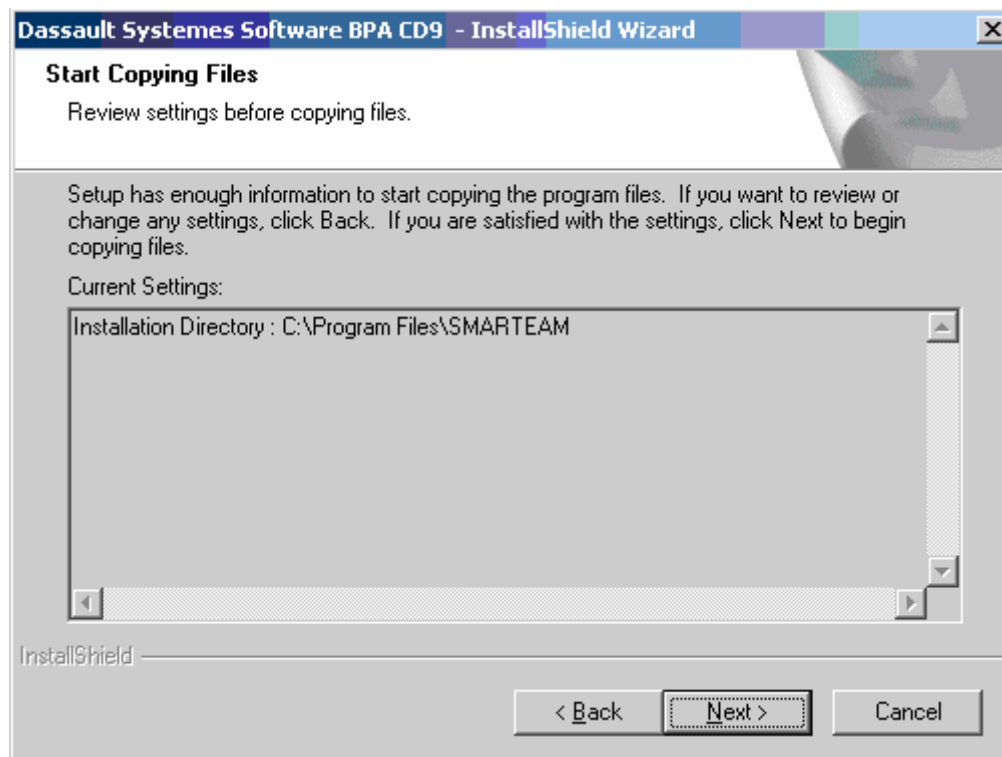
InstallShield

< Back   Next >   Cancel

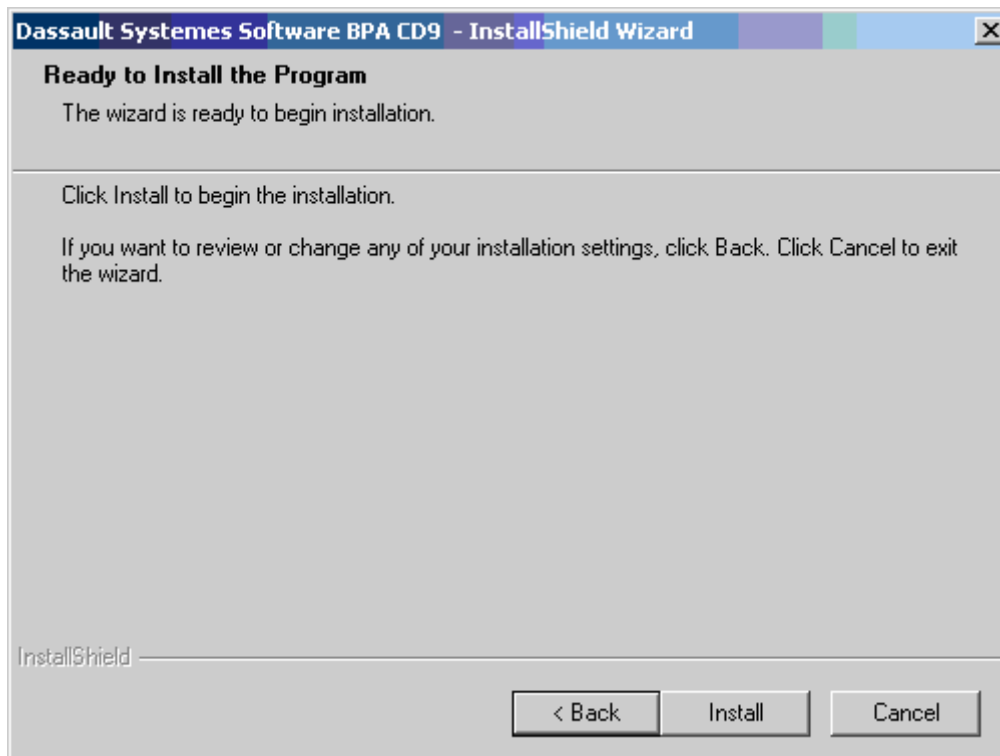
The Destination Folder area shows the destination directory for the program files. By default this path will point to the ENOVIA SmarTeam installation directory. You may specify another path by clicking on Browse and selecting a different folder.

Click on Next to proceed to the next window, Copying Files

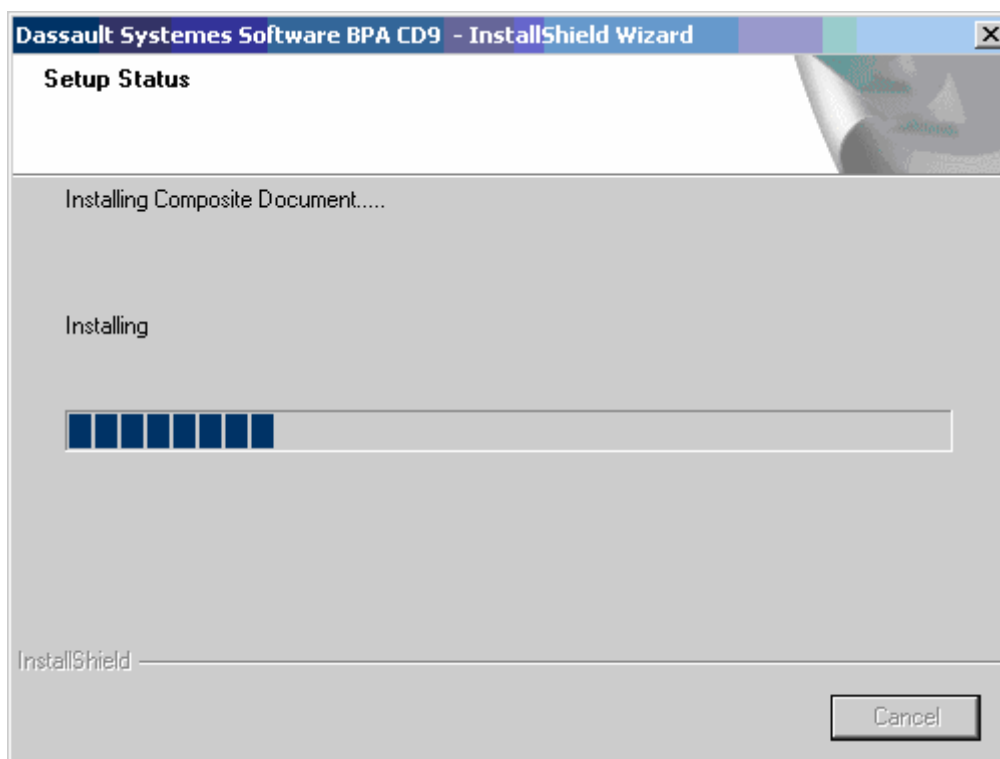
#### 4. Copying Files



Click the Next button to proceed to the next window.

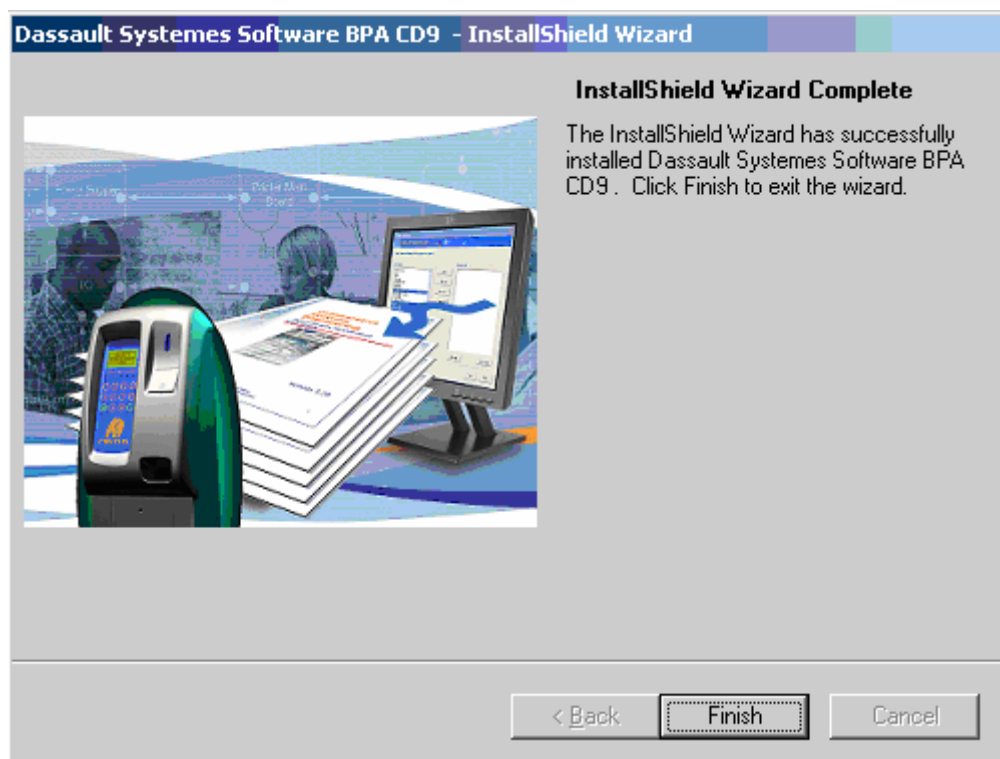


5. Click Install to proceed with the installation. Click Back to return to a specific window to review and change any incorrect settings before continuing.



6. The installation process will now copy the selected files into the designated folders on your computer. Progress is shown on the screen via the Setup Status graphics bar window.

7. At the end the setup window will change:



Select Finish.

The installation is now complete, please read on to view the post-installation tasks.

## 3. Configuring Composite Document Generation

### 3.1. Composite Document Generation Configuration

#### 3.1.1. Setting the Word Integration for the BPA Composite Document

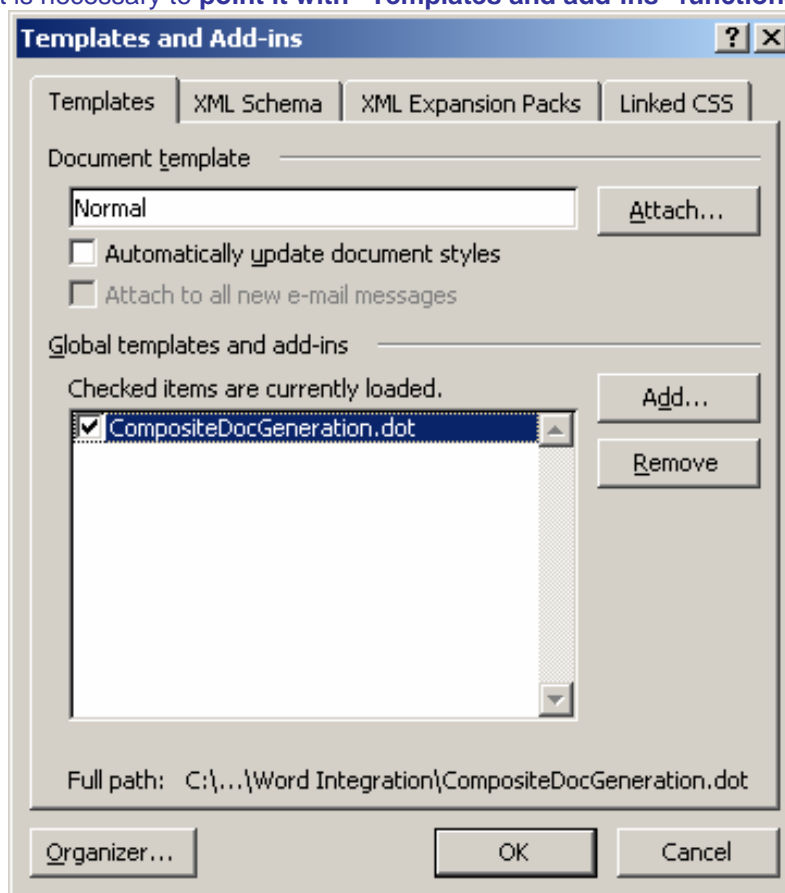
Composite Document module provides Word integration through a specific toolbar, used for generating documents. This integration is supported for Microsoft Office 2003 or higher.

To use these capabilities it must first be added to the word interface.

The toolbar is provided inside a word template file which is copied to the system during the installation phase. Following the installation the file can be found in the following path:

<Installation Directory>\CSE Solution\Word Integration\CompositeDocGeneration.dot

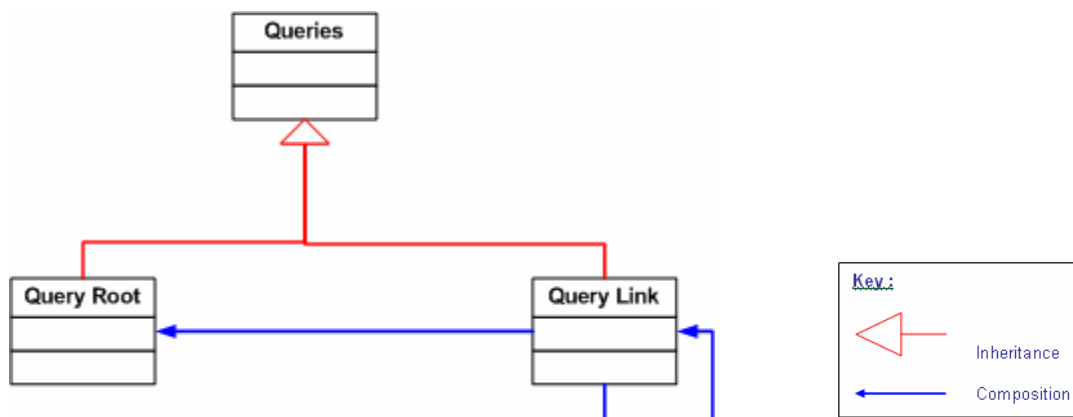
To use this toolbar, it is necessary to **point it with “Templates and add-ins” functionality.**



## 3.2. Starting a new data set / new database

### 3.2.1. Launch ENOVIA SmarTeam Data Model Design

Implement the following super class into your SmarTeam data model using Data Model Designer:



CLASSNAME	TABlename	CLASSTYPE	ENABLED TOP LEVEL ASSIGNMENT	INDEX UNIQUE
Queries	TN_QUERIES	SuperClass	FALSE	TRUE
Query Root	TN_QUERY_ROOT	SubClass	TRUE	TRUE
Query Link	TN_QUERY_LINK	SubClass	FALSE	TRUE

### 3.2.2. Setting up the attributes

#### Queries (TN\_QUERIES)

ATTRIBUTE EXTERNAL NAME	ATTRIBUTE INTERNAL NAME	ATTRIBUTE TYPE	IS PRIMARY IDENTIFIER	MANDATORY	OBLIGATORY	READ ONLY	REFERENCED CLASS	SIZE
Unique Identifier	CN_ID	Char	TRUE	FALSE	FALSE	FALSE		21
State	STATE	LookUpTable	FALSE	FALSE	TRUE	TRUE	State (STATE)	4
Creation Date	CREATION_DATE	TimeStamp	FALSE	FALSE	TRUE	FALSE		8
Created by:	USER_OBJECT_ID	RefToClass	FALSE	FALSE	TRUE	TRUE	Users (USERS)	4
Modified by:	USER_ID_MOD	RefToClass	FALSE	FALSE	TRUE	TRUE	Users (USERS)	4
Last modification date and time	MODIFICATION_DATE	TimeStamp	FALSE	FALSE	TRUE	FALSE		8
Description	TDM_DESCRIPTION	Char	FALSE	FALSE	FALSE	FALSE		256
Selection Class ID	TDMX_SELECTION_CLASS_ID	SmallInt	FALSE	FALSE	FALSE	FALSE		2
Parent Class ID	TDMX_PARENT_CLASS_ID	SmallInt	FALSE	FALSE	FALSE	FALSE		2
Query XML	TDMX_QUERY_XML	Memo	FALSE	FALSE	FALSE	FALSE		16
Query Title	TDMX_QUERY_TITLE	Char	FALSE	FALSE	FALSE	FALSE		201

#### Query Root (TN\_QUERY\_ROOT)

No specific attributes

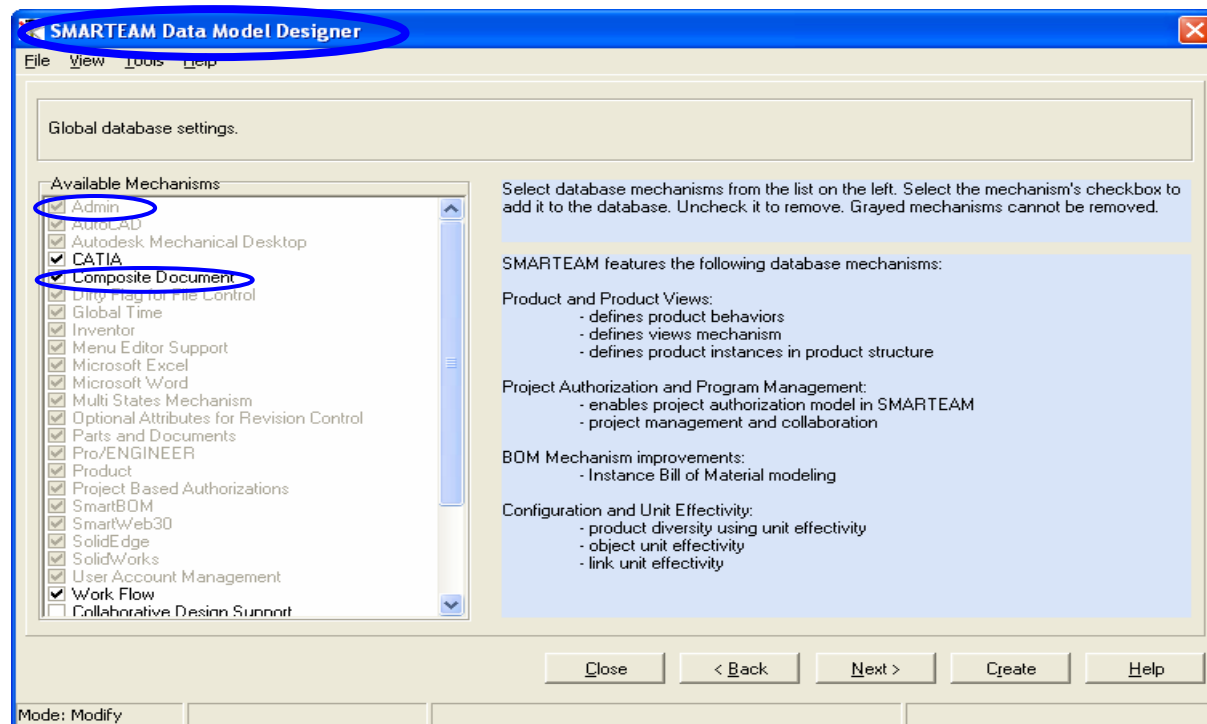
#### Query Link (TN\_QUERY\_LINK)

No specific attributes

### 3.2.3. Setting up the database mechanisms

Launch now the Data Model Designer tool.

In the DMD, you can now choose which mechanisms you wish to add :

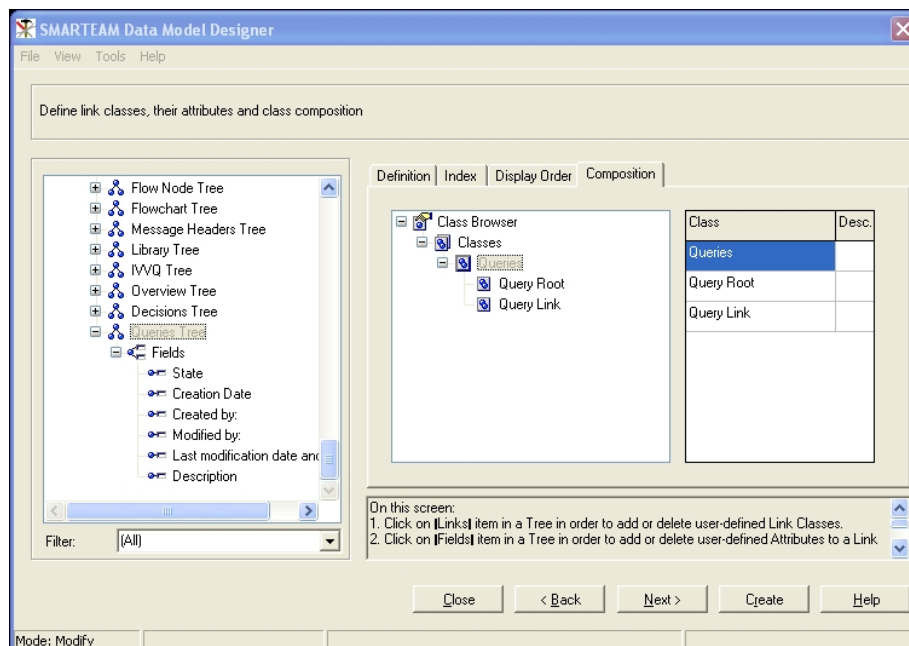


**Choose the mechanisms you wish**

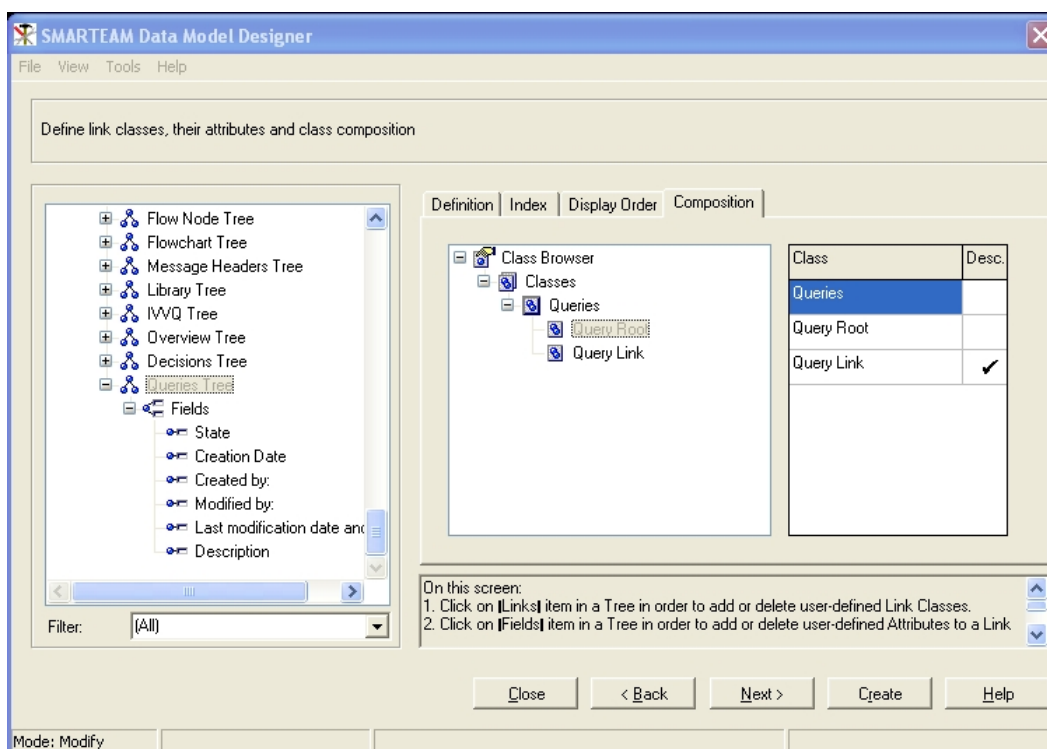


### 3.2.4. Create composition rules

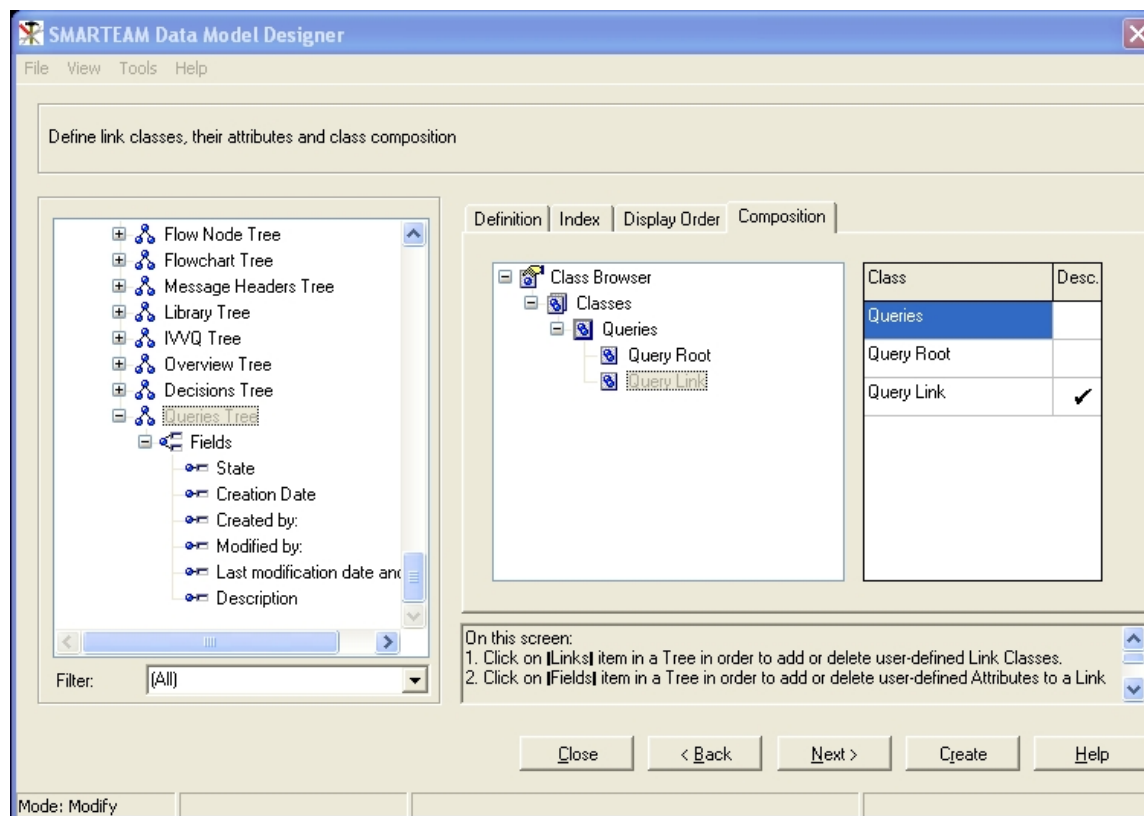
For queries



For query root



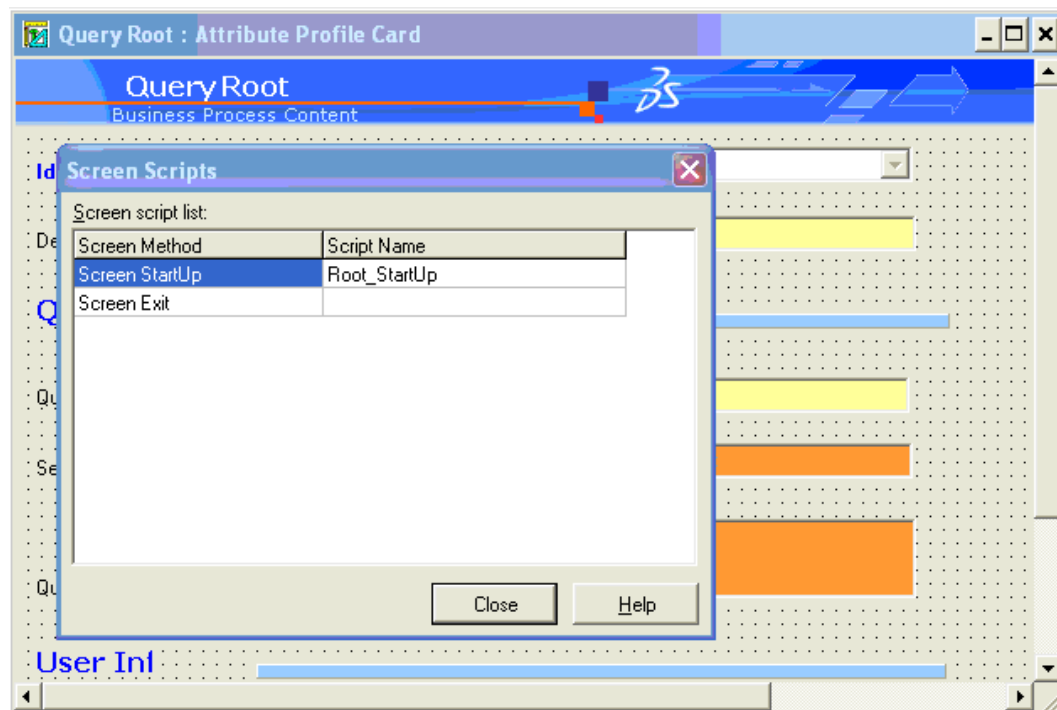
For query link



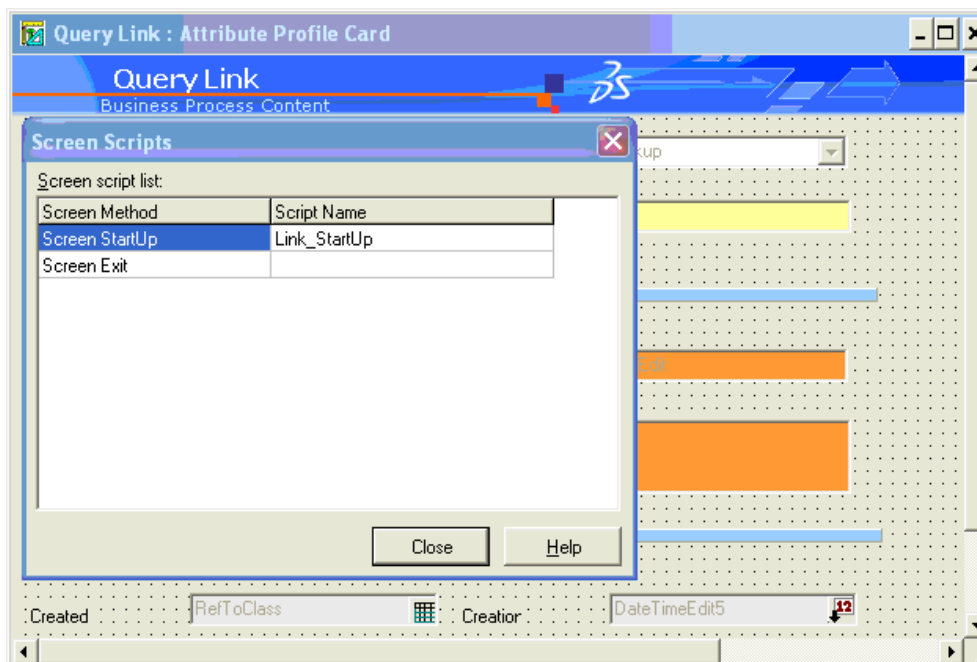
### 3.2.5. Hook

This section describes how to fill Hook.

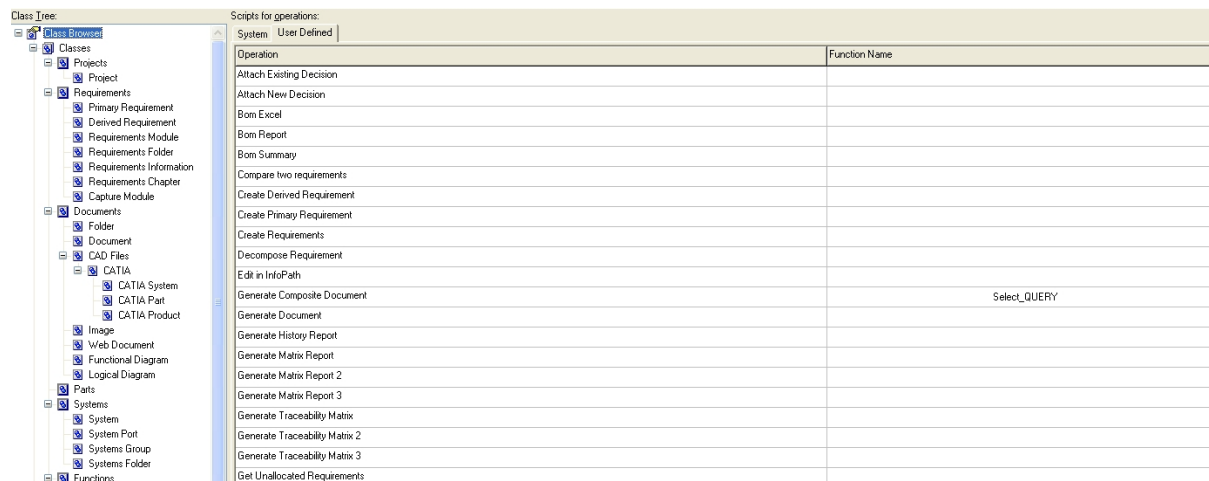
This is the hook to query root:



This is the hook to query link:

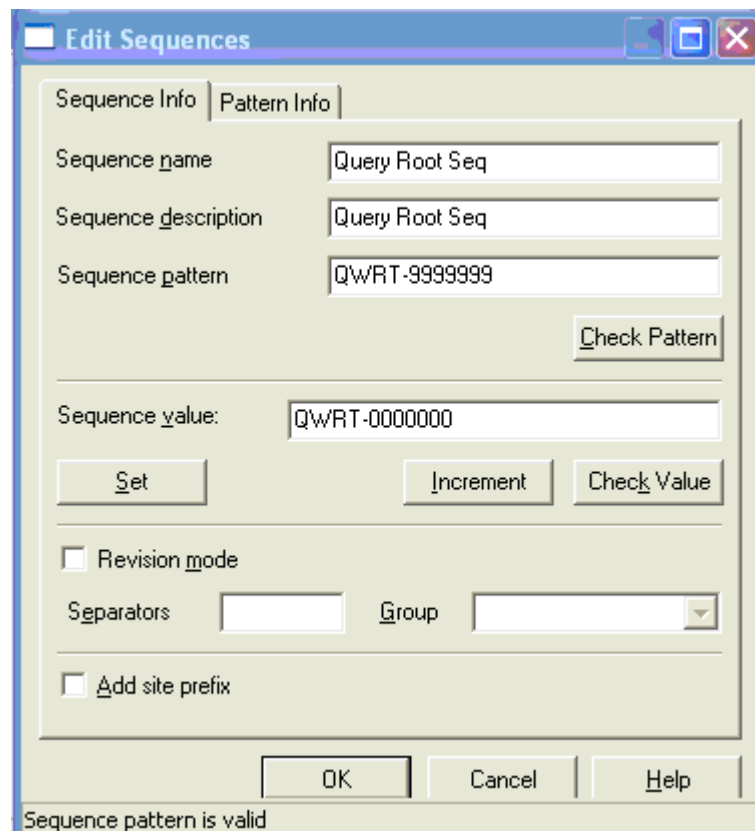


Hook to user defined tools:



### 3.2.6. Create sequences

Create sequence for query Root and Query link like



And



**Edit Sequences**

Sequence Info | Pattern Info

Sequence name: Query Link Seq

Sequence description: Query Link Seq

Sequence pattern: QWLK-9999999

Check Pattern

Sequence value: QWLK-0000000

Set Increment Check Value

☐ Revision mode

Separators: Group:

☐ Add site prefix

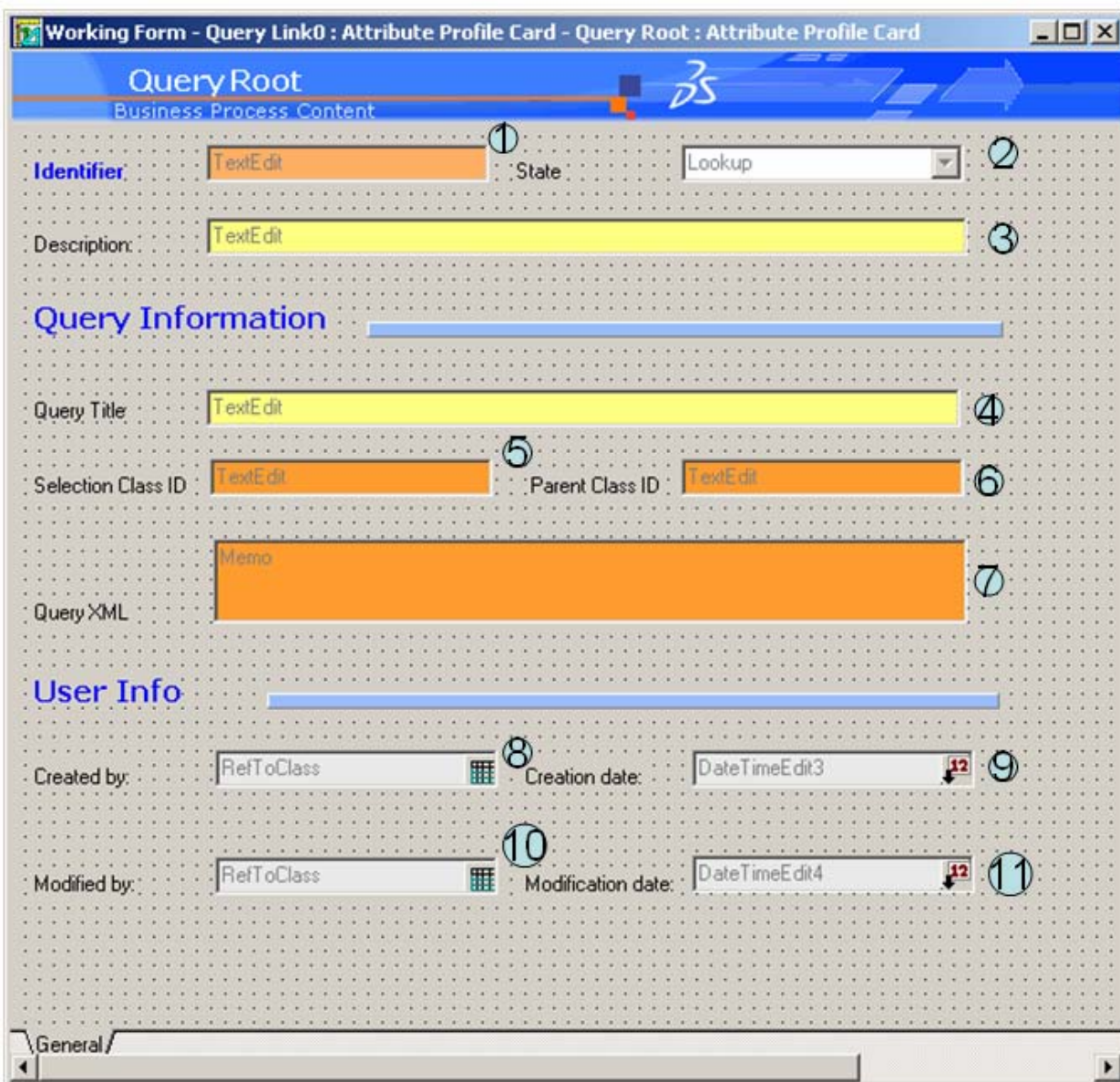
OK Cancel Help

Sequence pattern is valid

### 3.2.7. Creation Form

In order to create the finalize form Query Root and Query Link starting from forms already created and not yet finalized in Data Model Designer, user load intermediate forms in Form Designer.

To create form Query Root, modify labels and colors, add banner and panels, rename tab in 'General' as above:



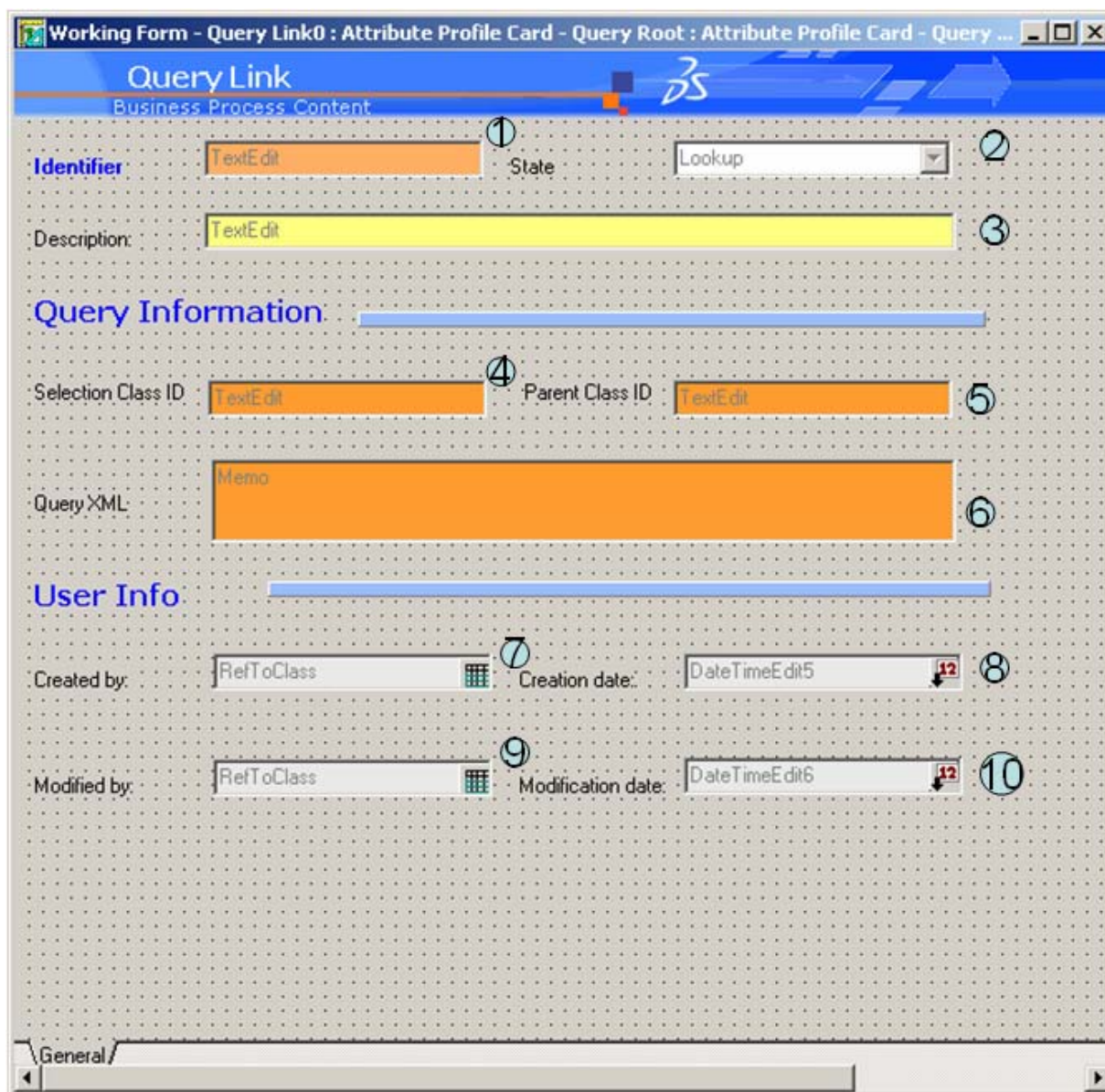
In case of manual queries tree creation, the type of the control and the associated attributes follows in the list:

For the field (1) identifier, the type of control is a TextEdit and joined attribute is CN\_ID,

(2) state	Lookup	STATE,
(3) Description	Textedit	TDM_DESCRIPTION.
(4) Query Title	Textedit	TDMX_QUERY_TITLE,
(5) Selection Class ID	Textedit	TDMX_SELECTION_CLASS_ID,
(6) Parent Class ID	Textedit	TDMX_PARENT_CLASS_ID,
(7) Query XML	Memo	TDMX_QUERY_XML,
(8) Created by	RefToClass	USER_OBJECT_ID,
(9) Creation date	DateTimeEdit	CREATION_DATE,
(10) Modified by	RefToClass	USER_ID_MODE,
(11) Modification date	DateTimeEdit	MODIFICATION_DATE.



To create form Query Link, modify labels and colors, add banner and panels, rename tab in 'General' as above:



In case of manual queries tree creation, the type of the controls and the associated attributes are in following list:

For the field (1) identifier, the type of control is a TextEdit and joined attribute is CN_ID,		
(2) state	Lookup	STATE,
(3) Description	Textedit	TDM_DESCRIPTION.
(4) Selection Class ID	Textedit	TDMX_SELECTION_CLASS_ID,
(5) Parent Class ID	Textedit	TDMX_PARENT_CLASS_ID,
(6) Query XML	Memo	TDMX_QUERY_XML,
(7) Created by	RefToClass	USER_OBJECT_ID,
(8) Creation date	DateTimeEdit	CREATION_DATE,
(9) Modified by	RefToClass	USER_ID_MODE,

(10) Modification date

DateTimeEdit

MODIFICATION\_DATE.

To verify the result of Query Root function using SmarTeam, select add Query Root for a project. The form Query Root is displayed.

To verify the result of Query Link function using SmarTeam, select add Query Link for a project. The form Query Link is displayed.

### 3.2.8. Copy Form (optional)

In order to get appropriate profile cards, the best way is to copy the profile cards from the DB provided for tests and the DB where is done the customization.

To do so, user can use a tool called CopyForm, which can be found on the following forum:

<http://www.plmdb.smartuserforum.com/>

## 3.3. Admin settings list

Composite Document Section

**SECTION**  
COMPOSITE\_DOCUMENT

**SUBJECT**  
FILTERED\_CLASSES

### INSTRUCTIONS

Define the super classes that are filtered in the "Composite Doc" wizard. Use this admin setting to filter super classes that are not relevant for the user.

1

N/A

2

N/A

3

N/A

4

N/A

**Long Field**

Users, Parts, Contacts, History, Admin, Overview, Queries

**SECTION**  
COMPOSITE\_DOCUMENT

**SUBJECT**  
FILTERED\_ATTRIBUTES

### INSTRUCTIONS

Define the attributes that are filtered in the "Composite Doc" wizard. Use this admin setting to filter attributes that are not relevant for the user.

1

N/A

2

N/A

3

N/A

4

N/A

**Long Field**

TDMX\_SOURCE\_IMAGE, TDMX\_IMAGE, TDM\_SECURED\_BY,  
TDM\_APPROVED\_BY, TDMX\_SUBMITTED\_BY, USER\_OBJECT\_ID,  
USER\_ID\_MOD, TDMX\_OWNER



**SECTION**  
**COMPOSITE\_DOCUMENT**

**SUBJECT**  
**DEFAULT\_SORT\_ROOT**

**INSTRUCTIONS**

The reordering is only when creating the query, not by using the query.  
Define the default attribute to be used as the default sorting reference for query root objects. The first value is the name of the attribute with a 'L.' prefix for link's attribute and 'S.' for class's attribute.  
The second value defines the way to sort the result (TRUE=ascending, FALSE=descending)

<b>1</b>	L.TDMX_ORDERING
<b>2</b>	TRUE
<b>3</b>	N/A
<b>4</b>	N/A
<b>Long Field</b>	N/A

**SECTION**  
**COMPOSITE\_DOCUMENT**

**SUBJECT**  
**DEFAULT\_SORT\_LINK**

**INSTRUCTIONS**

The reordering is only when creating the query, not by using the query.  
Define the default attribute to be used as the default sorting reference for query link objects. The first value is the name of the attribute with a 'L.' prefix for link's attribute and 'S.' for class's attribute.  
The second value defines the way to sort the result (TRUE=ascending, FALSE=descending)

<b>1</b>	L.TDMX_ORDERING
<b>2</b>	TRUE
<b>3</b>	N/A
<b>4</b>	N/A
<b>Long Field</b>	N/A

### **3.4. Setting the licensing mechanism for Composite Document Generation**

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Ask for a license and copy or enroll licenses according to the "CSE\_LicenseUseManagement\_R19D6" guide.

## 4. Modifying or uninstalling Composite Document Generation

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### 4.1. *Before modifying or uninstalling*

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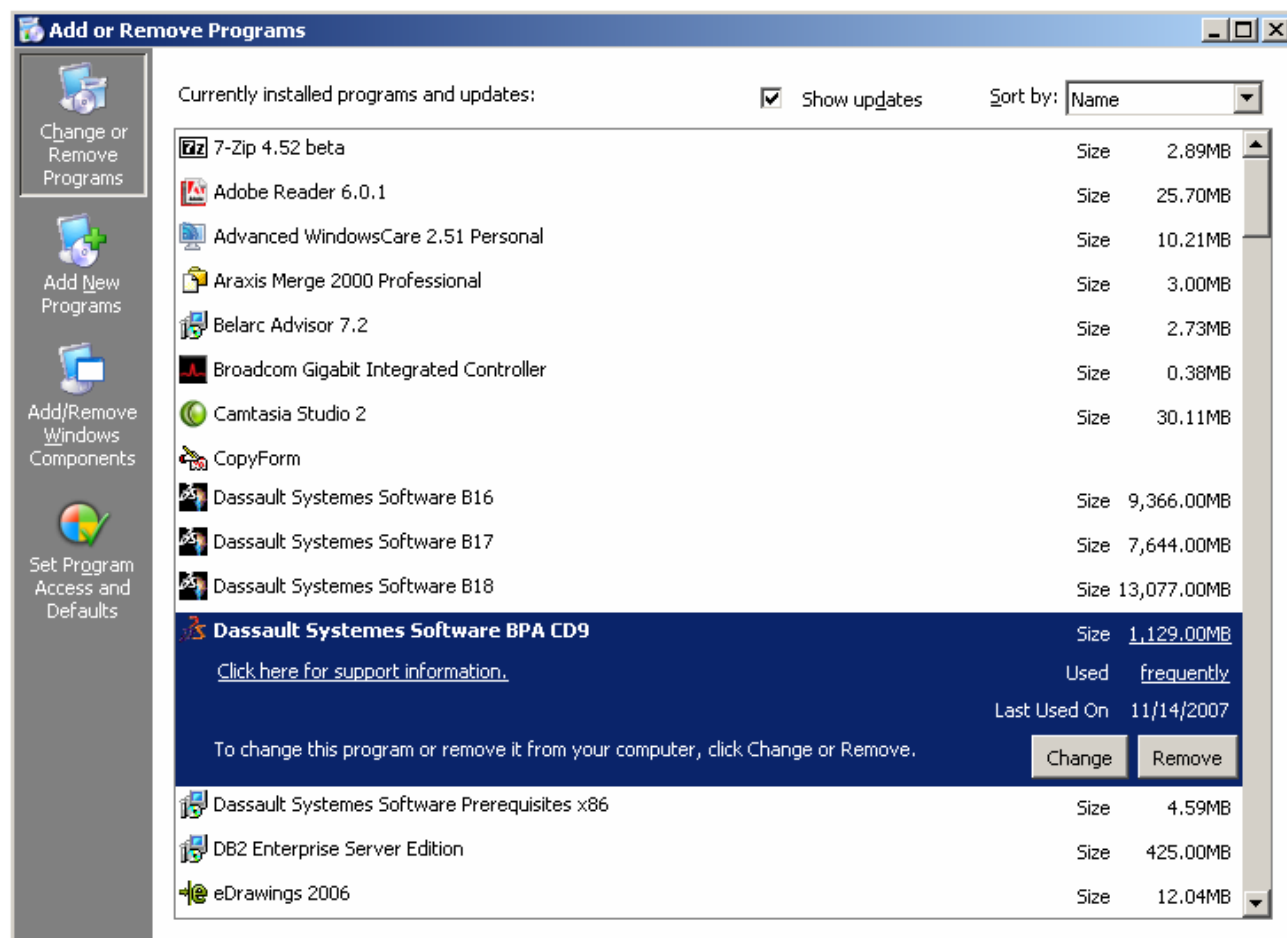
#### Note

- In order to prevent the unintentional loss of data, Uninstalling Composite Document does not automatically detach or delete the connected database which was installed with the solution. If you wish to detach the Composite Document database, you need to do so manually using the database connection manager tool. Consequently you will be able to delete the database file from its location (the location will be indicated during the detachment operation)
- If you wish to reinstall Composite Document and start again with the original database you must detach the database using the database connection manager **and** delete the \*.ldf file located in the same directory as the database file

### 4.2. *Uninstalling Composite Document Generation*

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In order to uninstall Composite Document BPA, the user must launch Add or Remove Programs utility of Windows and select Composite Document.  
Then select "Remove"



### 4.3. Starting Composite Document Generation

Launch the ENOVIA SmarTeam client application.

The default login used for demo purpose is "joe" without any password.

Switch to the appropriate database if it's not your default database (Click on **file-> Switch to database**).

**SmarTeam - [Projects: ]**

File Edit Actions View Tree SmartFlow Tools Window Help

Projects Tree

- Admin Settings

Attribute Link Comment

**Project**  
Business Process Content

**Identifier** Admin Settings

Description: Admin Setting Project

Project status:  Budget:  Project leader:

Start date:  Finish date:

**User Info**

Created by: joe Creation date: 04/20/2004 15:24

Modified by: joe Modification date: 10/14/2004 14:48

General

Login: joe