

SMART Annotate

User guide

Copyright since 2017, B&W Software GmbH

Weisse-Herz-Str. 2a

91054 Erlangen

Germany

www.buw-soft.de

December, 17th 2021

Contents

.....	3
Introduction.....	7
About SMARTAnnotate.....	8
The Ribbon UI.....	8
Using SMARTAnnotate.....	11
The User Dialog.....	12
Working with the Filter Structure.....	12
User Favorites.....	13
Language and Format Management.....	15
Using the Meta Data Management.....	19
Applying Std-Annotations.....	21
Placing Notes.....	25
Placing Stack Notes.....	28
Placing Symbols.....	38
Placing Tables.....	41
Manipulating existing Objects.....	43
Notifications.....	45
Using the Notification Center.....	46

1

Introduction

About SMARTAnnotate.....	8
The Ribbon UI.....	8

About SMARTAnnotate

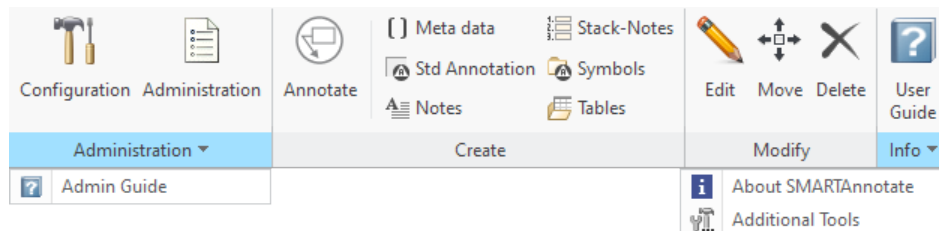
Generally **SMARTAnnotate** is designed to support **users and administrators** with **placing, harmonizing and managing Standard annotations** in **2D drawings** and **3D models**

The software provides the following functions:

- User dialog to easily select and place annotations
- Multi-language support for all kinds of annotation
- Drawing Format Management
- Meta Data management.
- Administrator dialog to comfortably organize the annotation elements and structure

The Ribbon UI

All **SMARTAnnotate** commands are accessible from the ribbon tab **SMARTAnnotate**. The ribbon is available in the modes: Part, Assembly and Drawing. The content of the ribbon is the same for all modes.



- **Administration:**
 - Configuration — (Admin mode only) opens the configuration dialog
 - Administration — (Admin mode only) opens the administrator dialog
 - Font Alignment — (Admin & drawing mode only) auto-creates necessary data to properly align Stack-Notes vertically if a non-mono-spaces font is used
 - Admin Guide — (Admin mode only) opens software documentation created for the administrators
- **Create:**

-
- Annotate — opens the user dialog to initially place annotations
 - Shortcuts to all tabs within the user dialog
 - **Modify:**
 - Edit — Edit any item that originally was placed with **SMARTAnnotate**
 - Move — Move any item that originally was placed with **SMARTAnnotate**
 - Delete — Delete any item that originally was placed with **SMARTAnnotate**
 - **Info:**
 - User Guide— opens software documentation created for the users
 - About SMARTAnnotate — shows copyright and version information
 - Additional Tools — Check out the other great Creo tools provided by B&W Software GmbH


2

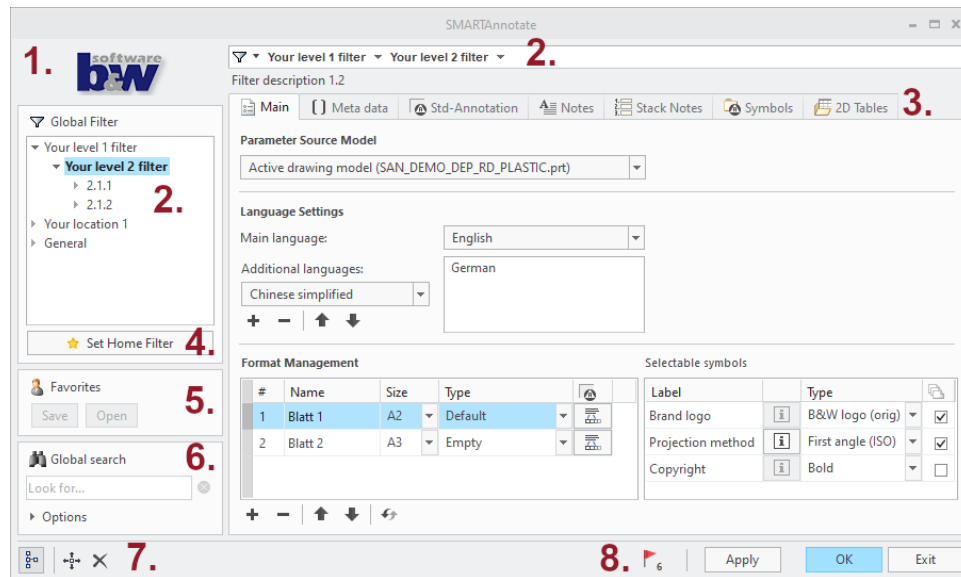
Using SMARTAnnotate

The User Dialog	12
Working with the Filter Structure	12
User Favorites	13
Language and Format Management	15
Using the Meta Data Management.....	19
Applying Std-Annotations.....	21
Placing Notes.....	25
Placing Stack Notes	28
Placing Symbols.....	38
Placing Tables	41
Manipulating existing Objects	43

The User Dialog

The User dialog within **SMARTAnnotate** allows you to easily select objects and place them on the drawing or within a 3D model.

1. Select **Annotate**  from the **SMARTAnnotate** tab
 - The **User** dialog opens

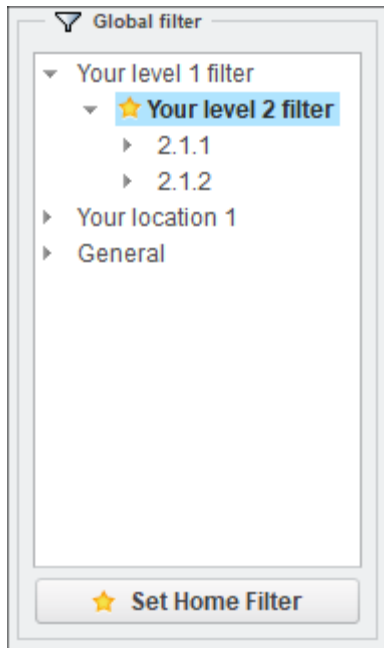


1. Company logo
2. Global filter tree
3. Content tabs
4. Home-Filter control
5. User Favorites
6. Global search
7. Control bar
8. Notification center


Working with the Filter Structure

The filter structure is the main mechanism to distinguish different settings like notes, formats, symbols for user selection and display.

You can browse through the structure using the **Global Filter** tree:



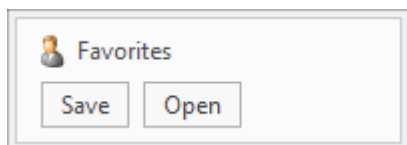
The selected filter node is highlighted and indicates that you are now looking at content related to this node.

The **Home Filter**  is related to the **Global Filter Parameter** and its value defined in the administration dialog. When opening the user dialog the software looks for this parameter and its value in the related 3D model. If the parameter exists and the value matches with a filter definition the structure is expanded up to this node and the yellow star is placed next to it.

You may use the **Set Home Filter** button to apply the home filter to any node. This will write the respective parameter value back to the active Creo model.

User Favorites

The **Favorites** capability provides the ability to save and retrieve user related settings manually. You may save multiple selections including its values.



It is available for the following areas:

- Std-Annotations
- Stack-Notes
- Symbols

Saving Favorites

1. Activate the **Std-Annotations** tab or the **Stack-Notes** tab
2. Select **Save** from the **Favorites** layout
 - In case of Std-Annotations you will be prompted to select the intended annotation sets.
3. Enter a name and save the .xml file to any folder location
 - The .xml file is saved and contains the current selection of your Std-Annotations or Stack Notes.

Retrieving Favorites


1. Activate the **Std-Annotations** tab or the **Stack-Notes** tab
2. Select **Open** from the **Favorites** layout
3. Browse to the previously saved .xml file and open the file
 - In case of **Std-Annotations** you will be informed about the status of the import and prompted to select the sheet(s) where the annotations shall go to.
 - In case of **Stack-Notes** you will be informed if any entities are already in your selection list and not imported. Place the stack as usual.

Additionally, the software saves the latest selection and the latest used languages by default.

It is available for the following areas:

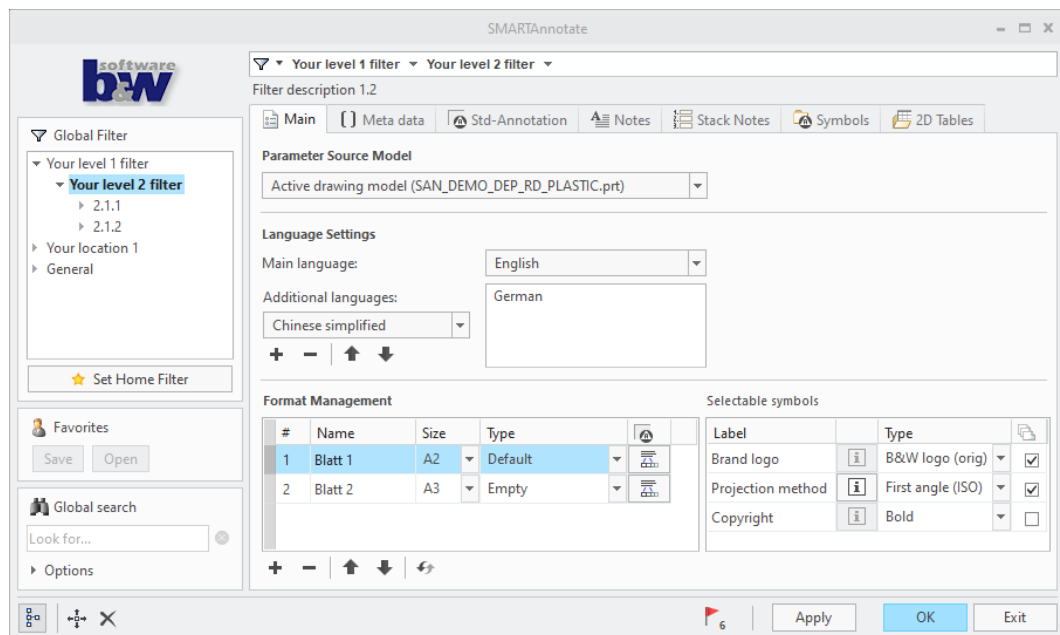
- Std-Annotations
- Stack-Notes
- Symbols
- Languages in Main tab

Latest used settings

1. When leaving the **User dialog** with **OK**, latest used settings are saved to your local machine automatically.
 - A structure of .xml files is created in `C:\Users\\AppData\Roaming\SmartAnnotate`
 - Recently used **Languages, Std-Annotations, Symbols** and **Stack-Notes** are stored
2. Retrieve these selections with the  icon from the Std-Annotation or Stack-Notes tab.
3. For new objects the latest used languages are resumed from the settings.

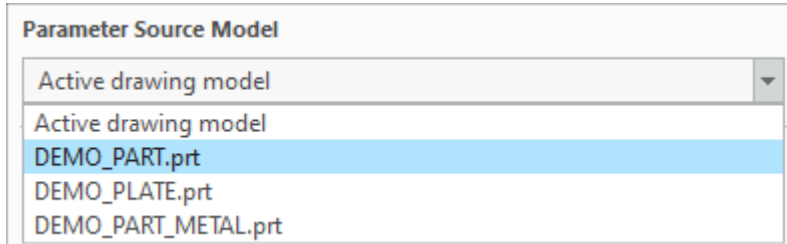
Language and Format Management

When opening **SMARTAnnotate** the **Main**  tab is displayed.



Parameter Source Model

The displayed model name indicates where parameter values are called out from.



- In part or assembly mode the current active solid model name is displayed.
- In drawing mode you may have multiple drawing models and you can choose from the two options:
 - **Active Solid Model** (default) — the parameter values will switch when you change the active drawing model and update the format tables.
 - Any selected drawing model — The parameter values are permanently called out from the selected model.

Entry first row first column	Entry first row second column
Entry second row first column	Entry second row second column

Language Settings

To use the language settings the following requirements need to be valid:

- You must have a valid license for the multi-language option
- The config option to enable multi-language must be set
- Other languages need to be configured

Switch the **Main language** to another language by selecting another entry from the pull-down menu. The language will be exchanged in all your texts, symbols, formats as far it is configured for language change.

Add or remove **Additional languages** from the pull-down menu. This will add a 'Translation' to your existing text using the main language.

 **Note**

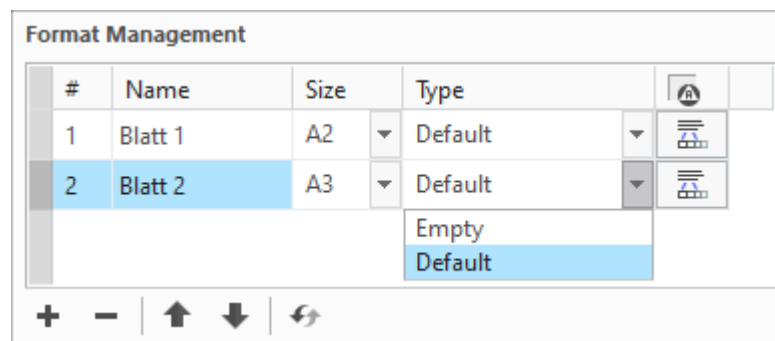
This needs to be configured within your symbols, pattern files and formats to take effect.

 **Note**


For non-roman language types you may need to install the necessary font.

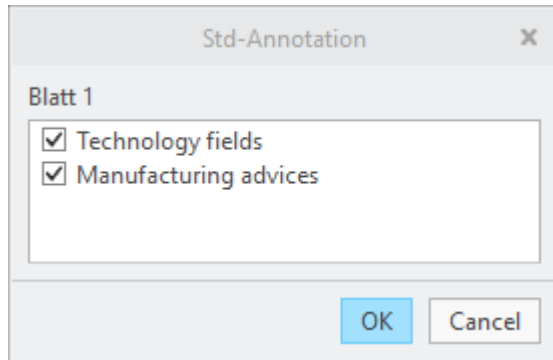
Format Management






Available in **Drawing mode**  only!



- Select a paper **Size** from the pull-down menu.
- Select a format **Type** from the pull-down menu. **Empty** removes the format from your drawing or indicates that no format is used. This option is not available for **Custom** format sizes.





- Use the **Sheet Placement**  icon to define on which sheet the software will apply the Std-Annotations on.
 - The **Placement** dialog opens.



- Select or deselect the Annotation-Sets from the list.
- You can **Add**  or **Remove**  Sheets.
- Sort the Sheets using  and .
- The **Update**  button updates all information related to the formats.

Selectable Format Symbols

In order to provide a maximum on flexibility your administrator has enabled the ability to choose from a symbol instance in the **Selectable Symbols** table.

Selectable symbols			
Label		Type	
Brand logo		B&W logo (orig) ▼	<input checked="" type="checkbox"/>
Projection me...		First angle (ISO) ▼	<input checked="" type="checkbox"/>
Copyright		- ▼	<input type="checkbox"/>

- Select a symbol instance from the drop-down list
- Use the adjacent check box to specify if this symbol instance shall be applied to
 - All drawing sheets (box is checked)
 - This particular sheet (box is unchecked)
- If an image of the symbol is provided from the administration, you may click on the **Info** button and see a preview image of the respective symbol instance.

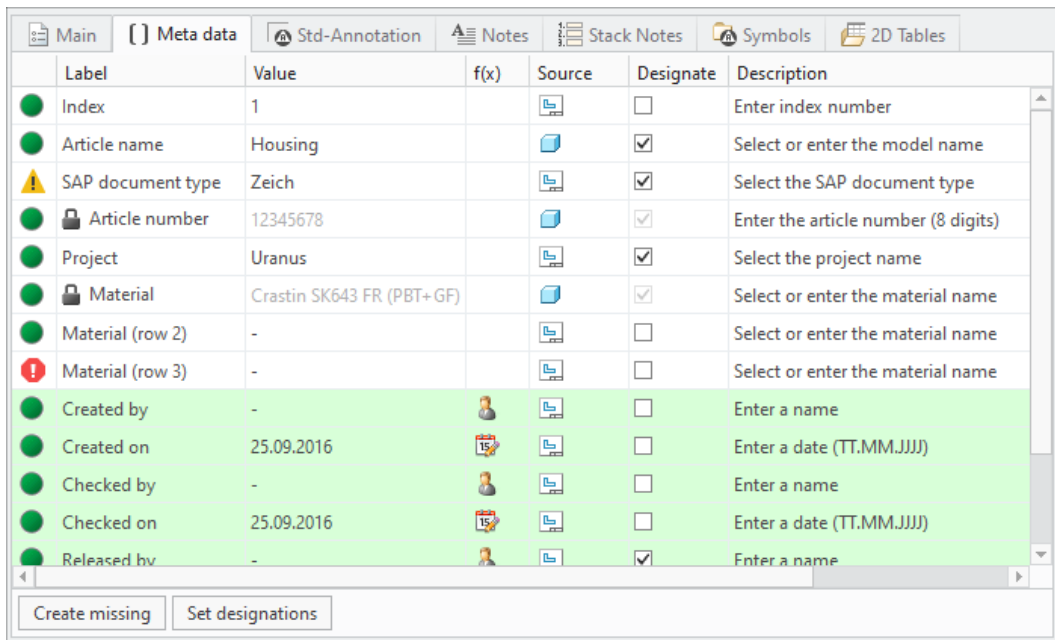
Note

When adding a new sheet to your drawing the settings of the previous symbols will be evaluated to set the symbol instance. If you select a different format type the default from the configuration is used.

Using the Meta Data Management

The **Meta data** [] tab displays all **Parameter Set** definitions that are associated with the current filter node or the drawing format. The sets may have different background colors.



The complete tab can be hidden via a configuration setting if you do not want to use this functionality.



The screenshot shows a software interface with a tabbed menu at the top. The 'Meta data' tab is active. Below the menu is a table with columns: Label, Value, f(x), Source, Designate, and Description. The table contains several rows, some with green backgrounds and some with red backgrounds. At the bottom of the table are two buttons: 'Create missing' and 'Set designations'.

Label	Value	f(x)	Source	Designate	Description
Index	1			<input type="checkbox"/>	Enter index number
Article name	Housing			<input checked="" type="checkbox"/>	Select or enter the model name
SAP document type	Zeich			<input checked="" type="checkbox"/>	Select the SAP document type
Article number	12345678			<input checked="" type="checkbox"/>	Enter the article number (8 digits)
Project	Uranus			<input checked="" type="checkbox"/>	Select the project name
Material	Crastin SK643 FR (PBT+GF)			<input checked="" type="checkbox"/>	Select or enter the material name
Material (row 2)	-			<input type="checkbox"/>	Select or enter the material name
Material (row 3)	-			<input type="checkbox"/>	Select or enter the material name
Created by	-			<input type="checkbox"/>	Enter a name
Created on	25.09.2016			<input type="checkbox"/>	Enter a date (TT.MM.JJJJ)
Checked by	-			<input type="checkbox"/>	Enter a name
Checked on	25.09.2016			<input type="checkbox"/>	Enter a date (TT.MM.JJJJ)
Released by	-			<input checked="" type="checkbox"/>	Enter a name

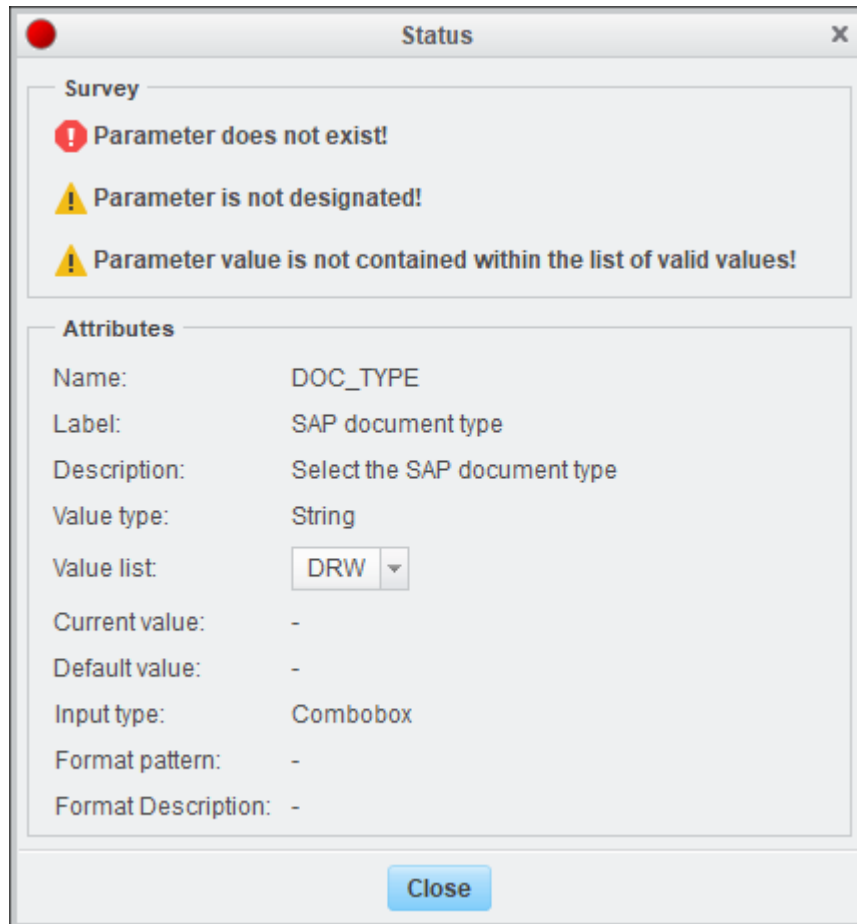
- The **Label** column indicates the parameter label. It may not be equal to the parameter name.
- Use the **Value** column to enter a value or chose from a pull-down list
- The function column **f(x)** provides special functions to fill the value.
 - — Inserts your current Login-Name
 - — Inserts Today's date

-
- The **Source** column indicates the source of the parameter value..
 -  — Drawing
 -  — Solid model
 - The **Description** column provides a little extra information for filling the value.
 - Use the **Create missing** button to create all missing parameters automatically.
 - Use the **Set designations** button to correct all wrong designation states.

 **Note**

When leaving the dialog with **OK**, all missing parameters are created and all designations are set.


- The **Status** column provides a quality status. Click on the bullet and a status window will open.



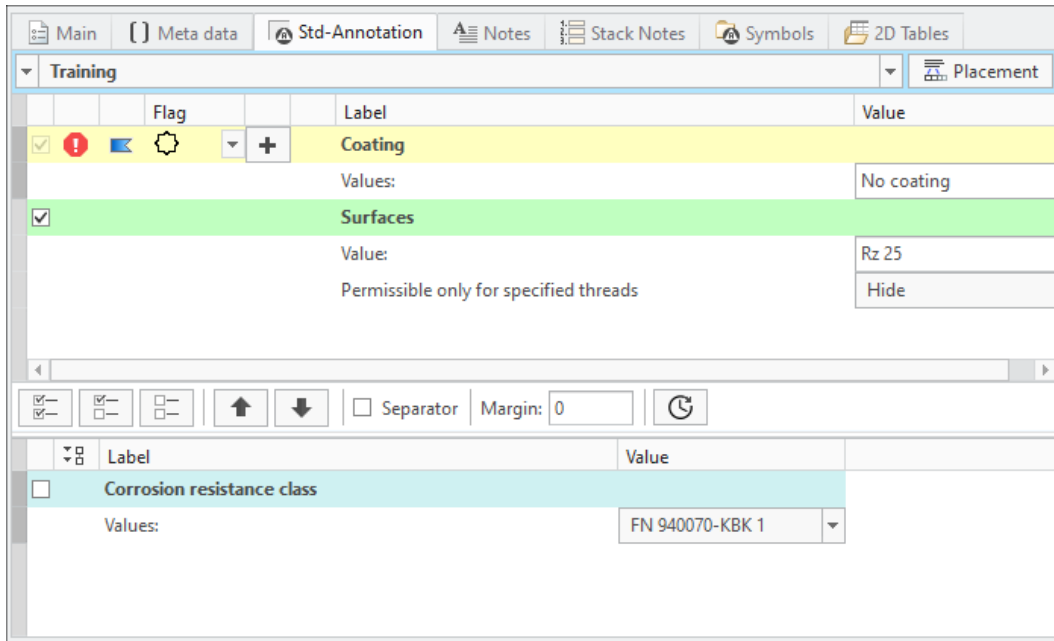
It lists the current issues and the attribute definition. It will help to correct the issues quickly.




- Use the **Apply** button or the **OK** button of the dialog to see the values appear in the call out areas.

Applying Std-Annotations





The **Std-Annotation**  tab provides a pull-down menu for all **Std-Annotation Set** definitions that are associated with the current filter node or the drawing format. The content of the current set is displayed.

The complete tab can be hidden via a configuration setting if you do not want to use this functionality.



- The display is split into two areas.
 - **Pool area** (Lower display) — Available entries associated with the filter node are listed here
 - ◆ You may expand  or collapse  the value rows and column to improve the visibility
 - **Collection area** (Upper display) — All selected items and its values are displayed here
- The **Label** column displays the Std-Annotation label itself and the label of the corresponding values.
- The **Value** column provides the ability to enter values or choose from pull-down lists.
- The **Flag** column indicates if a flag is assigned to the annotation definition.
- The **Flag Placement** column provides the **Plus**  button to place one or multiple flags for the selected row. It appears when the flag is set to active only.
- The **Flag Status** column shows a Warning symbol, if no flags have been placed for an active flag symbol.
- The **Flag symbol** column allows to choose the flag symbol.







Selection

1. Choose the **Std-Annotation Set** from the pull-down at the very top of the display.
2. Select entries from the **Pool area** one-by-one, all  or mandatory and required items  to add them to the preview area.
 - The selected Std-Annotations are displayed in the **Collection area**.
 - You can sort the entries with the   buttons.
 - To separate the entries you may use a **Separator** or a **Margin**.
 - One entry may contain multiple rows. A headline and several value or choice rows. The complete entry is marked with a dark bar when selected.

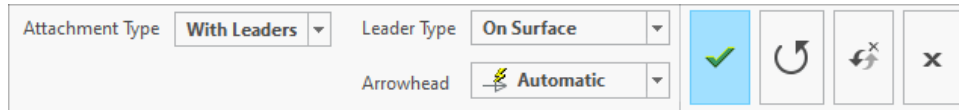
Note

'Mandatory' items cannot be deselected from the **Collection area**. Only the administrator can change this setting.

(Optional) Flag Activation and Placement

1. Click on the little flag symbol to activate the **Flag** indication
 -  — Flag inactive
 -  — Flag active
 - A new entry will be created automatically within the **Flag**  tab and the **Stack Notes** sub-tab. Start flag symbol placement from there.
 -  — Flag indication (`option LISTING_FLAG_ENABLES_MIXED_STATE = YES`)
 - No entry will be created automatically within the **Flag**  tab and the **Stack Notes** sub-tab.
2. Choose the **Flag symbol** from the pull-down list.
3. Use the **Plus**  in the respective row to start placing the flag.




- The **SMARTAnnotate** dialog will disappear and the **Settings** tab in the Ribbon will open.




4. Choose the **Attachment Type** from the pull-down menu.
 - Free — Unattached placement
 - At vertex — Select a vertex
 - Normal to entity — Placement normal to selected geometry
 - With Leaders — Select one or multiple attachment points
 - On Entity — Select a geometry item that the note will placed on
 - Offset — Select a 2D item and chose an offset from there.

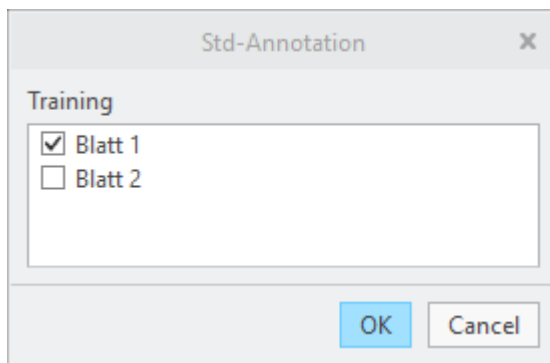
Note

The available options are defined during symbol definition and might vary.

5. Choose the **Leader Type** from the pull-down menu
6. Choose the **Arrowhead** style from the pull-down menu
7. Select the attachment references (if required) and place with LMB.
 - Select **OK** from the little popup menu or use MMB to finish the placement.
8. Finish the placement
 - Select **Redo**  from the dashboard UI to redo the current placement.
 - Select **OK**  from the dashboard UI or MMB to finalize the placement.
 - The **SMARTAnnotate** dialog will re-open automatically and you can continue with another flag placement.
 - Select **Cancel**  from the dashboard UI to discard the placement.
 - The **SMARTAnnotate** dialog will re-open automatically and you can continue with another flag placement.

Placement

1. Select the **Placement**  button to define or verify the drawing sheets where the Annotation set goes to.
 - The Placement dialog opens.




- Select or deselect from the list of Sheets.
 - Close the dialog with **OK**.
2. Select the **Apply** button or the **OK** button of the dialog.
 - For every **Std-Annotation Set** a stack of **Std-Annotations** is build up automatically.

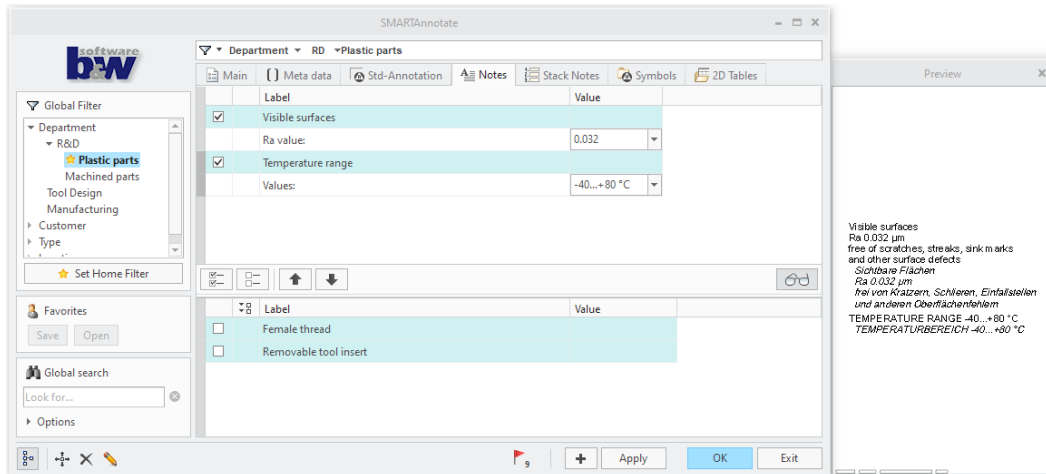
Note



Do not forget to set the check box for Std-Annotations in the **Main tab** ► **Format Management** in the intended sheet!

Placing Notes




The **Notes**  tab provides a selection UI for all **Note** definitions that are associated with the current filter node.


The complete tab can be hidden via a configuration setting if you do not want to use this functionality.




- The display is split into three areas.
 - **Pool area** (Lower display) — Available entries associated with the filter node are listed here
 - ◆ You may expand  or collapse  the value rows and column to improve the visibility
 - **Collection area** (Upper display) — All selected items and its values are displayed here
 - **Preview area** (Attached to the right) — Live preview of your Note configuration including all values and choices (2D mode only)
- The **Label** column indicates the Notes label. It may not be equal with the containing text. When you move the mouse over the text label, a tooltip with the complete text will appear.
- The **Value** column is for entering values or choosing from pull-down lists.

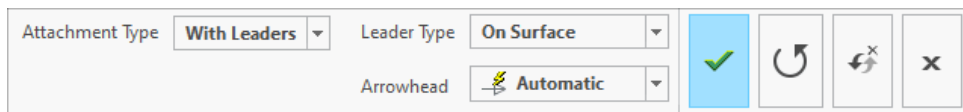
Selection





1. Select entries from the **Pool area** one by one or all  .
 - The selected notes are displayed in the **Collection area**.
 - You can sort the entries with the   buttons.

- (Optional) Open the **Preview area**  and view the live status of your note configuration (2D mode only)
 - One entry may contain multiple rows. A headline and several value or choice rows. The complete entry is marked with a dark bar when selected.
2. (Optional) Enter a value or chose from a pull-down list if necessary.
 - The Preview is updated according to your selection and choices. Use the return-key to finish an entry.

Placement

1. Use the **Plus**  to start placing the notes.
 - The **SMARTAnnotate** dialog will disappear and the **Settings** tab in the Ribbon will open.




2. Chose the **Attachment Type** from the pull-down menu.
 - Free — Unattached placement
 - With Leaders — Select one or multiple attachment points
 - On Entity — Select a geometry item that the note will placed on
 - Offset — Select a 2D item and chose an offset from there.
3. Chose the **Leader Type** from the pull-down menu
4. Chose the **Arrowhead** style from the pull-down menu
5. Finish the placement
 - Select **OK**  or use MMB to finish the placement.
 - The **SMARTAnnotate** dialog will re-open automatically and you can continue with another set of notes.
 - Select **Cancel**  to cancel the placement.
 - The **SMARTAnnotate** dialog will re-open automatically and you can continue with another set of notes.
 - Select **Redo**  to start over with the placement.
 - Select **Repeat**  to keep the current instance of the note and add another one

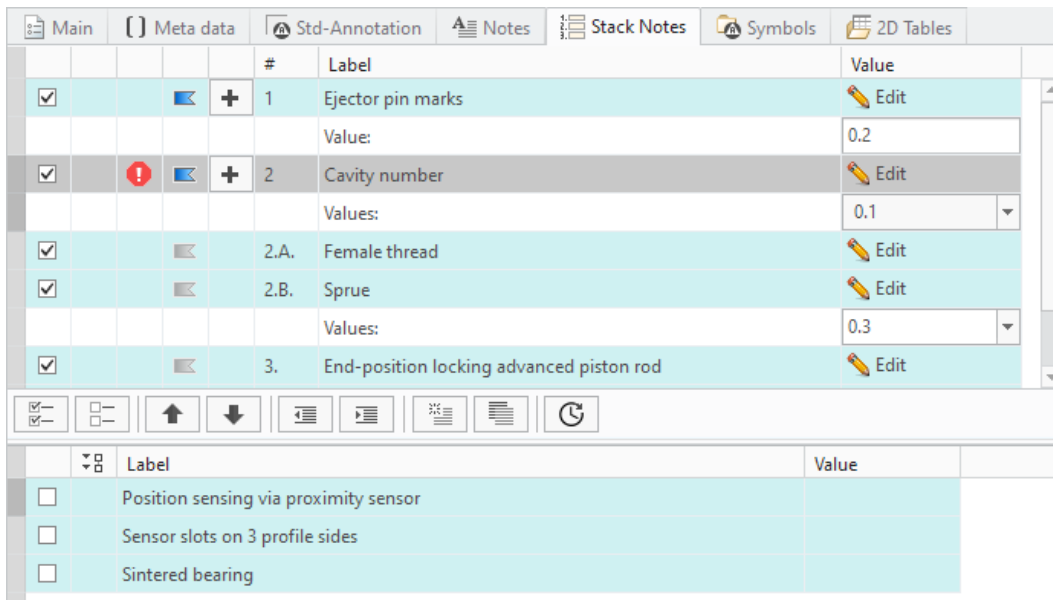
Note













If you have selected multiple note items, they are merged into a single note during placement.









Placing Stack Notes



The **Stack Notes**  tab provides a selection UI for all **Stack Note** definitions that are associated with the current filter node.


The complete tab can be hidden via a configuration setting if you do not want to use this functionality.






<input checked="" type="checkbox"/>			#	Label	Value
<input checked="" type="checkbox"/>			1	Ejector pin marks	 Edit
				Value:	0.2
<input checked="" type="checkbox"/>				2	Cavity number
				Values:	0.1
<input checked="" type="checkbox"/>			2.A.	Female thread	 Edit
<input checked="" type="checkbox"/>			2.B.	Sprue	 Edit
				Values:	0.3
<input checked="" type="checkbox"/>			3.	End-position locking advanced piston rod	 Edit

<input checked="" type="checkbox"/>	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>							
								


- The display is split into two areas.
 - **Pool area** (Lower display) — Available entries associated with the filter node are listed here
 - ◆ You may expand  or collapse  the value rows and column to improve the visibility

-
- **Collection area** (Upper display) — All selected items and its values are displayed here
 - The **Label** column indicates the Stack Notes label. It may not be equal with the containing text. When you move the mouse over the text label, a tooltip with the complete text will appear.
 - The **Value** column is for entering values or choosing from pull-down lists.
 - The **# (Number)** column applies an automatic numbering scheme. You can deactivate numbering using the configuration option `NOTE_LISTING_TYPE`. There are several more options to control the formatting of **Stack Notes**. Please see the Configuration Chapter for more details.
 - The **Flag** column indicates whether an entry is marked as flagged. Find more information [here on page 30](#).
 - The **Flag Placement** column provides the **Plus**  button to place one or multiple flags for the selected row. It only appears when the flag is set to active.
 - The **Flag Status** column shows a warning notification symbol, if no flags have been placed for an active flag symbol.

Selection

1. Select entries from the **Pool area** one by one or all .
 - The selected notes are displayed in the **Collection area**.
 - You can sort the entries with the   buttons.
 - One entry may contain multiple rows. A headline and several value or choice rows. The complete entry is marked with a dark bar when selected.
2. (Optional) Enter a value or chose from a pull-down list if necessary.

Placement


1. Use the **Plus**  to start placing the notes.

-
- The **SMARTAnnotate** dialog will disappear and the notes stack will stick to your cursor for placement.
 2. Click LMB to drop the stack
 3. Move your mouse over the notes stack.
 - Watch more and more notes appear as you hover down the stack.
 - All notes will appear immediately if you move the mouse over the top of the stack.
 4. Use LMB again to drop those notes that are currently displayed.
 - The stack will break at this point and allows you to continue with the next column the same way until all notes are dropped.
 - A horizontal snap line will help aligning the columns will placing the notes.
 5. The placement finishes automatically when all notes are dropped.
 - The **SMARTAnnotate** dialog will re-open automatically.
 - The selected notes will remain in the **Collection area**.

 **Note**

You can only place one stack of notes. The notes will remain separate notes after placement.


(Optional) Flag Activation and Placement

1. Click on the little flag symbol to activate the **Flag** indication
 -  — Flag inactive

```

1. END-POSITION LOCKING WITH ADVANCED PISTON
   ROD
   ENDLAGENVERRIEGELUNG BEI AUSGEFAHRENER
   KOLBENSTANGE
2. PNEUMATIC CUSHIONING. ADJUSTABLE AT BOTH
   ENDS
   PNEUMATISCHE DÄMPFUNG. BEIDSEITIG
   EINSTELLBAR
3. PNEUMATIC CUSHIONING. SELF-ADJUSTING AT BOTH
   ENDS
   PNEUMATISCHE DÄMPFUNG. BEIDSEITIG
   SELBSTEINSTELLEND


```

-  — Flag active
 - The note number will be marked as flagged within the note text in the model/drawing.

```

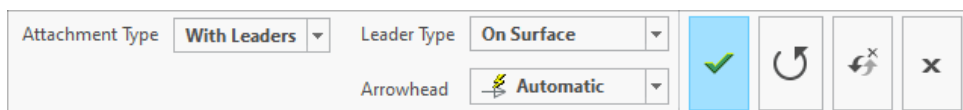
1 1. END-POSITION LOCKING WITH ADVANCED PISTON ROD
   ENDLAGENVERRIEGELUNG BEI AUSGEFAHRENER
   KOLBENSTANGE
2. PNEUMATIC CUSHIONING. ADJUSTABLE AT BOTH
   ENDS
   PNEUMATISCHE DÄMPFUNG. BEIDSEITIG
   EINSTELLBAR
3 3. PNEUMATIC CUSHIONING. SELF-ADJUSTING AT BOTH
   ENDS
   PNEUMATISCHE DÄMPFUNG. BEIDSEITIG
   SELBSTEINSTELLEND

```

-  — Flag indication (option LISTING_FLAG_ENABLES_MIXED_STATE = YES)
 - Same as active state, except that no warning notification will be shown if there was no flag note placed yet within the model/drawing.





2. Use the **Plus**  in the respective row to start placing the flag.

- The **SMARTAnnotate** dialog will disappear and the **Settings** dashboard within the ribbon is shown.

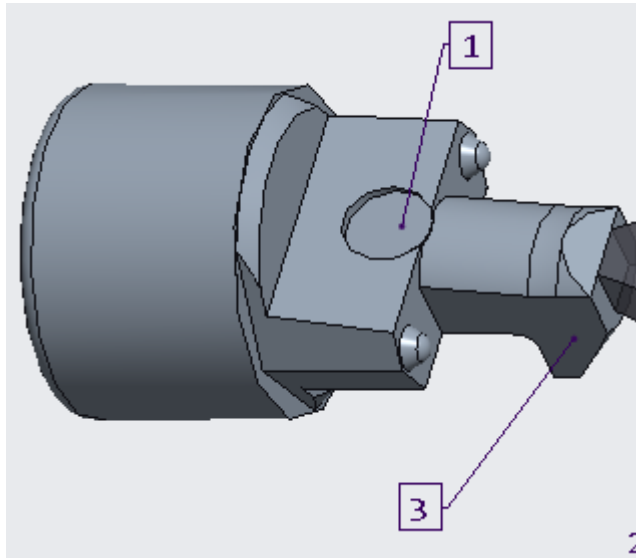


3. Chose the **Attachment Type** from the pull-down menu.

- Free — Unattached placement
- At vertex — Select a vertex


-
- Normal to entity — Placement normal to selected geometry
 - With Leaders — Select one or multiple attachment points
 - On Entity — Select a geometry item that the note will placed on
 - Offset — Select a 2D item and chose an offset from there.
4. Chose the **Leader Type** from the pull-down menu
 5. Chose the **Arrowhead** style from the pull-down menu
 6. Select the attachment references (if required) and place with LMB.
 - Select **OK** from the little popup menu or use MMB to finish the placement.
 7. Finish the placement
 - Select **Redo**  from the dashboard UI to redo the current placement.
 - Select **Repeat**  from the dashboard to keep the current instance and add another one.
 - Select **OK**  from the dashboard UI or MMB to finalize the placement.
 - The **SMARTAnnotate** dialog will re-open automatically and you can continue with another flag placement.
 - Select **Cancel**  from the dashboard UI to discard the placement.
 - The **SMARTAnnotate** dialog will re-open automatically and you can continue with another flag placement.

The created flags may look like this:



In 3D mode, the user-placed flags will be stored as elements within an annotation feature. The following parameters are created for these elements:

- **FLAG_NOTE:** Value is the name of the annotation element that corresponds to the note within the stack with the same number which the flag is referencing.
- **BUW_FLAG_TEXT:** Value is the actual number for instance “1” or “3”.
- **BUW_PREFIX:** This parameter gets called-out within the flag note text. If its value is non-empty, the value text is shown in front of the flag text.
- **BUW_SUFFIX:** This parameter gets called-out within the flag note text. If its value is non-empty, the value text is shown behind the flag text.

The prefix and suffix text can be changed using the edit function . After a flag note was selected, the following dialog will appear:

If the configuration option `ENABLE_FLAG_NOTE_PROTECTION` is set to `NO`, then the flag notes can also be edited interactively. On the one hand, the annotation element parameters can be changed by opening the

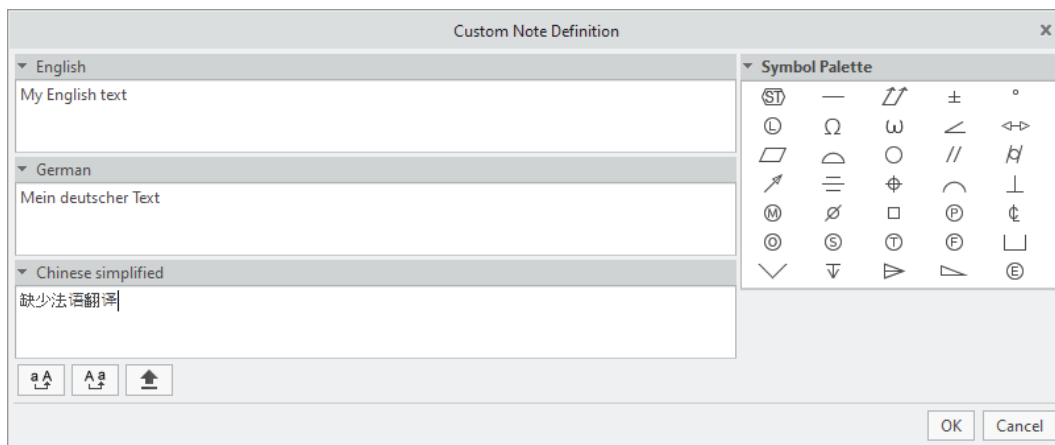
corresponding Creo parameters dialog. On the other hand, the note text can be selected and by double-clicking on the parameter call-outs, Creo shows an input panel that allows to edit the parameter values as well.

‘Custom Notes’ for individual user modifications

Custom Notes are a possibility for the user to add individual notes to the stack. This adds a lot of flexibility and individualism to this kind of note type, but also has its limitations.

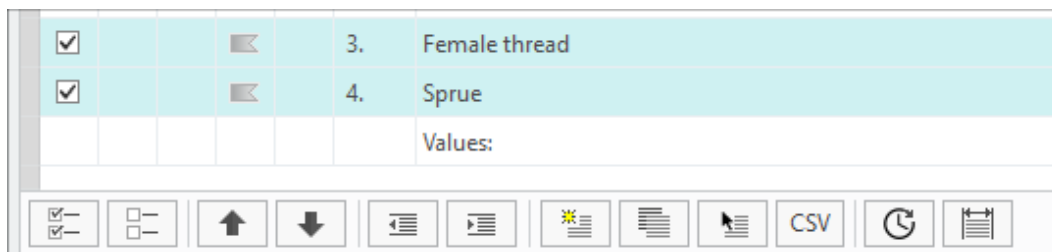
- **Custom Notes** do not support automatic translation
- Converting an existing **Stack Note** entry into a **Custom Note** is a point of no return
- No support for drop-down menus or Input fields.

Custom notes can be created in single or multi language manner in respect to the corresponding configuration setting. In single language mode, there’s just one text area for text input while in multi language mode, there’s a text area for every language that was selected. For instance if three languages are chosen, the dialog will appear like this:




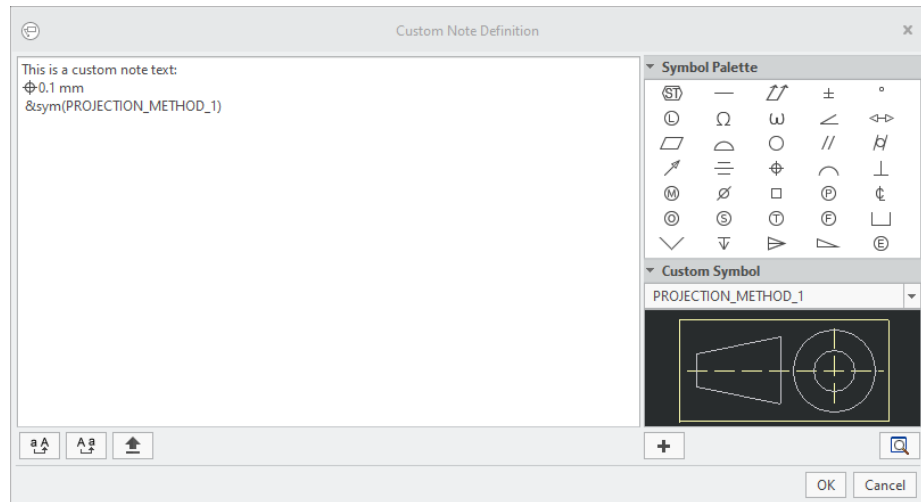
The following illustrations will show the custom note dialog used in single language mode.




There are different options to create a **Custom Note** that you can turn on or off individually through the configuration.



1. Create from scratch

- a. Select  from the icon bar within the **Stack Notes** tab
 - The Custom Note Definition dialog opens












- b. Enter any text into the large text area. You will have to enter your own translations here, if intended. Use the following buttons to control your input.
 -  — Converts all selected characters to **Upper Case**
 -  — Converts all selected characters to **Lower Case**
 -  — Caps lock key
- c. (Optional) Select a symbol from the symbol palette.
- d. (Optional) Select a custom symbol to be called out within the text from the drop-down list.

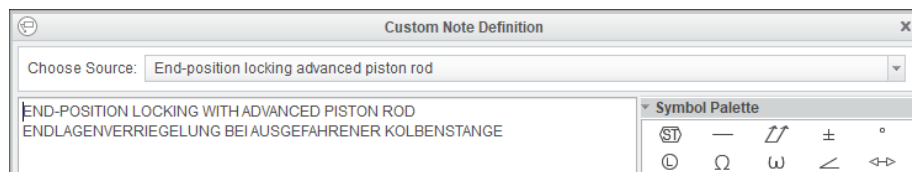
 **Note**




The symbols appearing in the list are the symbols that are already included in the drawing or model




- e. Click **OK** and the new **Custom Note**  will be added to notes stack.

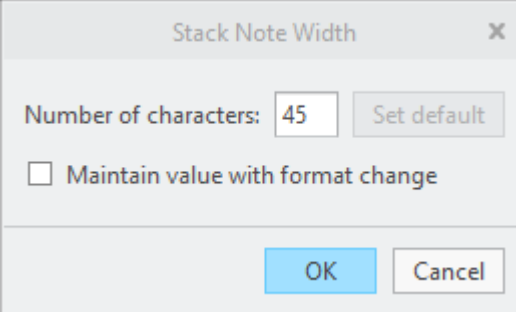
<input checked="" type="checkbox"/>		3.	Female thread	 Edit
<input checked="" type="checkbox"/>		4.	Sprue	 Edit
			Values:	0.3 
<input checked="" type="checkbox"/>			5.	New custom note  Edit

2. Create by copying an existing note entry
- a. Select  from the icon bar within the **Stack Notes** tab
- The **Custom Note Definition** dialog opens





- b. Choose an existing notes entry from the drop-down list. The original text appears within the text area.
- c. Modify the existing text as you like
- d. Click **OK** and the new **Custom Note**  will be added to notes stack.
3. Create by selecting an existing text from the drawing or model
- a. Use option *CUSTOM_NOTES_CHOP_RULE* to define a regular expression that will cause the selected note to be split up into separate notes at each occurrence of specific characters.
- b. Select  from the icon bar within the **Stack Notes** tab
- The Custom Note Definition dialog opens
- c. Modify the existing text as you like
- d. Click **OK** and the new **Custom Note**  will be added to notes stack.
4. Create by importing from a CSV file
- a. Use option *CUSTOM_NOTES_CHOP_RULE_CSV* to define a regular expression that will split up the text from CSV file into separate notes at each occurrence of specific characters.
- b. Select **CSV** from the icon bar within the **Stack Notes** tab

-
- The **File Open** dialog opens
- c. Select the intended CSV file from your folder structure
 - The content gets loaded into the **Custom Note Definition** dialog
 - According to the definition within your Configuration, the content is split into separate entities that you can walk through with the little arrows at the bottom.
 - d. Modify the existing text of each entity as you like
 - e. Click **OK** and the new **Custom Notes**  will be added to notes stack.
5. Use the **Recent**  button to load the custom notes from your local 'recent notes' stack.
 6. Define the character width of the stack notes column.
 - a. Use the **Width**  button to define the width of the stack
 - A dialog opens to enter an integer value for the maximum characters in a row of the stack.



The image shows a dialog box titled "Stack Note Width" with a close button (X) in the top right corner. Inside the dialog, there is a text input field labeled "Number of characters:" containing the value "45". To the right of the input field is a button labeled "Set default". Below the input field is a checkbox labeled "Maintain value with format change", which is currently unchecked. At the bottom of the dialog are two buttons: "OK" and "Cancel".


- Check the box to maintain the width even in the event of a format change.
7. Edit an existing note entry
 - a. Select **Edit**  from within the existing line item in the list
 - You will be prompted if you really want to convert this entity into a **Custom Note**.
 - The **Custom Note Definition** dialog opens showing the original text.
 - b. Modify the existing text as you like
 - c. Click **OK** and the existing note will turn into a **Custom Note**  .

Note

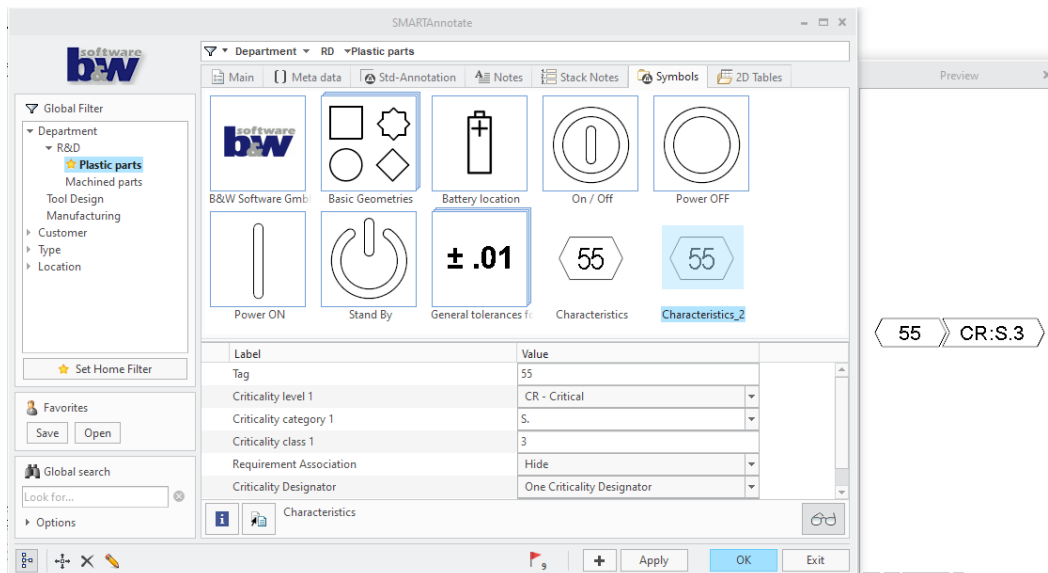
There are multiple Configuration options that control the display and formatting of the **Custom Notes**.

By default all empty lines will be removed automatically. Please contact your administrator for changing the respective option.

Placing Symbols

The **Symbols**  tab provides a graphical selection UI for all **Symbol** definitions that are associated with the current filter node.


The complete tab can be hidden via a configuration setting if you do not want to use this functionality.




- The display is split into four areas.
 - **Graphical Selection area** — Available symbols associated with the filter node
 - **Value area** — Value and Group choices
 - **Description area** — Link to a large image and description of the symbol

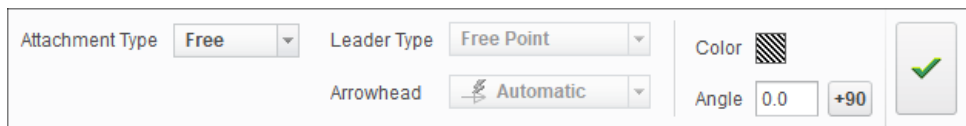
-
- **Preview area** — (attached to the right) Live preview of your symbol instance including the chosen groups and values

Selection and configuration

1. Select one entity from the **Graphical Selection area** .
 - A description is displayed in the **Description area**.
 - Use the **Info** icon to open up a larger preview or description image.
 - Open the **Preview area**  to receive a live preview of your symbol instance configuration.
2. (Optional) Enter a value or chose a group from a pull-down list if necessary. Use the Return-key to finish your input.
 - The live preview will be updated accordingly

Placement

1. Use the **Plus**  to start placing the symbol.
 - The **SMARTAnnotate** dialog will disappear and the **Settings** tab in the Ribbon will open.






The image shows the SMARTAnnotate Settings dialog box. It contains several controls: 'Attachment Type' set to 'Free', 'Leader Type' set to 'Free Point', 'Arrowhead' set to 'Automatic', 'Color' with a hatched pattern, 'Angle' set to '0.0' with a '+90' button, and a green checkmark button on the right.

2. Chose the **Attachment Type** from the pull-down menu.
 - Free — Unattached placement
 - At Vertex— Select a geometry vertex that the symbol will be placed next to.
 - Offset — Select a 2D item and chose an offset from there.

Note




The available options are defined during symbol definition and might vary.

3. (Optional) Chose the **Leader Type** from the pull-down menu

-
4. (Optional) Chose the **Arrowhead** style from the pull-down menu
 5. (Optional) Chose a **Color** for the symbol instance.
 6. (Optional) Rotate the symbol instance by an **Angle** or in **+90** degree steps
 7. Select the attachment references (if required) and place with LMB.
 8. Finish the placement
 - Select **Confirm**  from the little popup menu or use MMB to finish the placement.
 - You are in a loop and can continue to place more instances.
 - Select **Discard**  from the little popup menu to redo the current placement.
 - Select **OK**  from the ribbon UI or use RMB to finalize the placement.
 - The **SMARTAnnotate** dialog will re-open automatically and you can continue with another symbol placement.


Reusing a configured symbol instance

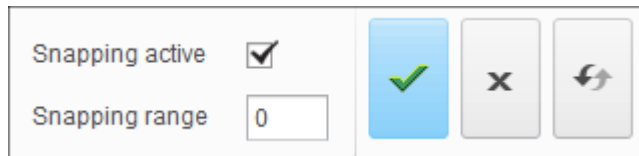
There are two options to reuse your final configured symbol

- Saving as a **Favorite**
 1. When your symbol definition is ready and placed in your model or drawing, use the **Save** button from the **Favorites**  area
 2. Pick the symbol instance from your model or drawing
 - You will be prompted to save the XML file to your local machine
 3. To retrieve the saved instance, use **Open** from the **Favorites**  area
 - Select the intended XML file
 - The saved symbol instance with all settings is brought into the dialog
 - Modify any values ore groups to your intend and place the instance.
- **Copy** function
 1. Use **Copy symbol**  from the dialog
 2. Select any symbol that has been placed by SMARTAnnotate
 - You will be automatically put into placement mode and can place the new symbol instance

- A description is displayed in the **Description area**.
- Use the **Info** icon to open up a larger preview or description image.
- (Optional) Open the **Preview area** to display the selected table including all variable texts.

Placement


1. Use the **Plus**  to start placing the symbol.
 - The **SMARTAnnotate** dialog will disappear and the **Settings** tab in the Ribbon will open.





2. Chose the **Attachment Type** from the pull-down menu.
 - Free — Unattached placement
 - At Vertex— Select a geometry vertex that the symbol will be placed next to.
 - Offset — Select a 2D item and chose an offset from there.

Note

The available options are defined during symbol definition and might vary.

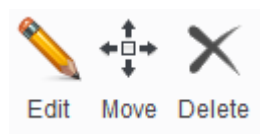
3. (Optional) Uncheck the **Snapping Active** check box to disable table snapping.
4. (Optional) Enter a **Snapping range**.
5. Place the table with LMB.
 - Use RMB to switch to the next snapping origin while dragging the table.
6. Finish the placement
 - Select **OK**  or use MMB to finish the placement.

- The **SMARTAnnotate** dialog will re-open automatically and you can continue with another table.
- Select **Cancel**  to cancel the placement.
- The **SMARTAnnotate** dialog will re-open automatically and you can continue with another table.
- Select **Redo**  to start over with the placement.


Manipulating existing Objects

By default **SMARTAnnotate** does not allow you to select objects that previously have been created via the software.

To manipulate these objects you have to use the Edit functions from the **SMARTAnnotate** ribbon or from within the dialog.



Edit objects

1. Click the **Edit**  icon and select an object that was created via **SMARTAnnotate**.
 - The **SMARTAnnotate** dialog will open to allow any kind of editing.
2. Select **Apply** or **OK** to see the changes in the graphics area..

Move Objects

1. Click the **Move** icon and select an object that was created via **SMARTAnnotate**.
 - The object is attached to your cursor for dragging.
 - In case of **Stack Notes** you will get prompted if you want to move only the selected column or the entire stack. You will have to replace the column or entire stack.
2. Drop the object at its new location with LMB.

 **Note**

This is not available for **Formats** and **Std-Annotations**.

Delete objects

1. Click the **Delete** icon and select any object.
 - The object will be deleted.
 - There is not multiple selection for this command for safety reasons.

3

Notifications

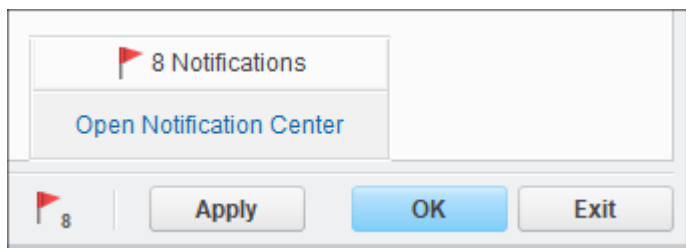
Using the Notification Center	46
-------------------------------------	----

Using the Notification Center

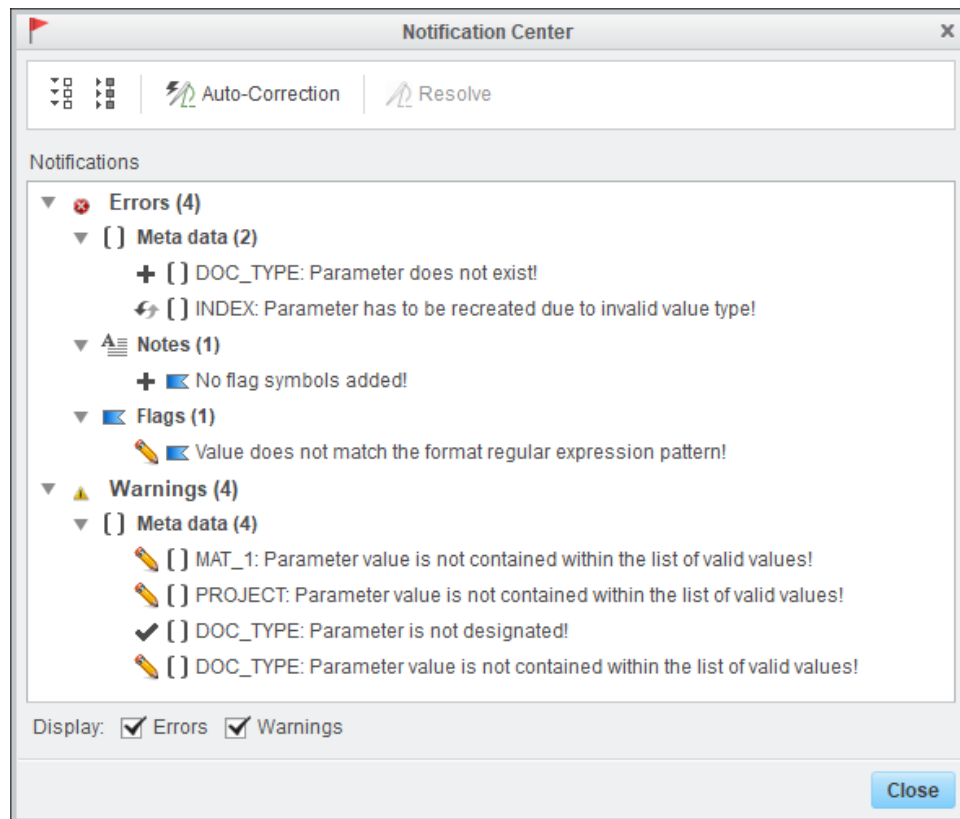
The Notification center within **SMARTAnnotate** is designed to point out Errors and Warnings that the software detects while working in the dialog. It will help correcting the issues as far as possible.

Displaying Warning and Errors

1. Select **Open Notification Center**  from the bottom panel of the user dialog.





- The **Notification Center** dialog opens



 **Note**

The dialog is not available if there are no warnings or errors.

Resolving Errors

1. Select a single Warning or an Error from the **Notifications** list.
2. Select the **Resolve**  icon.
 - The software will take you directly to the place where you can solve the issue manually (i.e. bring you into the tab to correct a value that does not match, starts placing a flag that was not added) or even resolves the issue automatically (i.e. creating a missing parameter automatically).
3. (Optional) Select the **Auto-Correction**  icon.
 - The software will try to resolve the issues automatically. The corrected issues will disappear from the list. Work on the remaining issues manually.

Ease of use

1. Tooltip for every entry in the message list
2. Cross reference highlighting when selecting a note type message in the dialog
3. Listing numbers of stack notes are included in message lines