



CAX-IF Recommended Practices

for the

Representation and Presentation of Product Manufacturing Information (PMI) (AP242)

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Document History

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1.0	May 1, 2006	Dave Briggs, Tom Hendrix	Initial Merge of GD&T and DT Recommended Practices
1.1	May 18, 2006	Steve Yates	Completed merging documents
1.2	July 10, 2006	Steve Yates	Revised some diagrams and added better specification for line and rectangular target areas
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2.0	Dec. 23, 2008	Tony Ranger	Update shape_aspect to geometry linkage to use geometric_item_specific_usage and shape_aspect to draughting_callout linkage to use draughting_model_item_association
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3.8b	August 6, 2014	Ed Paff	Added description for between in Table 8, updated Figure 5, added section 4.2 and various updates from evaluation paper for NIST project. Also modified figure 35 for datum referencing multiple features.
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4.0	October 13, 2014	Jochen Boy	Added note for view scaling to 8.4.2. Fixed order of attributes for relating Saved Views in 8.4.4. Updated Annex B. Updated 9.3.2.3 to separate centroids for tessellated curves and surfaces. Editorial changes for publication
4.0.1	June 9, 2016	Jochen Boy	Updated definitions for Dimensional Location (5.1.1), Groups of PMI (5.1.8), Dimension Modifiers (5.3), Decimal Qualifiers (5.4), Default Tolerance (6.3), Datum Target Types (6.6.1), Composite Tolerances (6.9.9), Graphic Presentation (8), Tessellated Presentation (8.2), Part-level Annotations (9.3.2).
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			(9.4.2.2); Updated Semantic PMI Validation Properties (10.1.1.2)
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1 Introduction

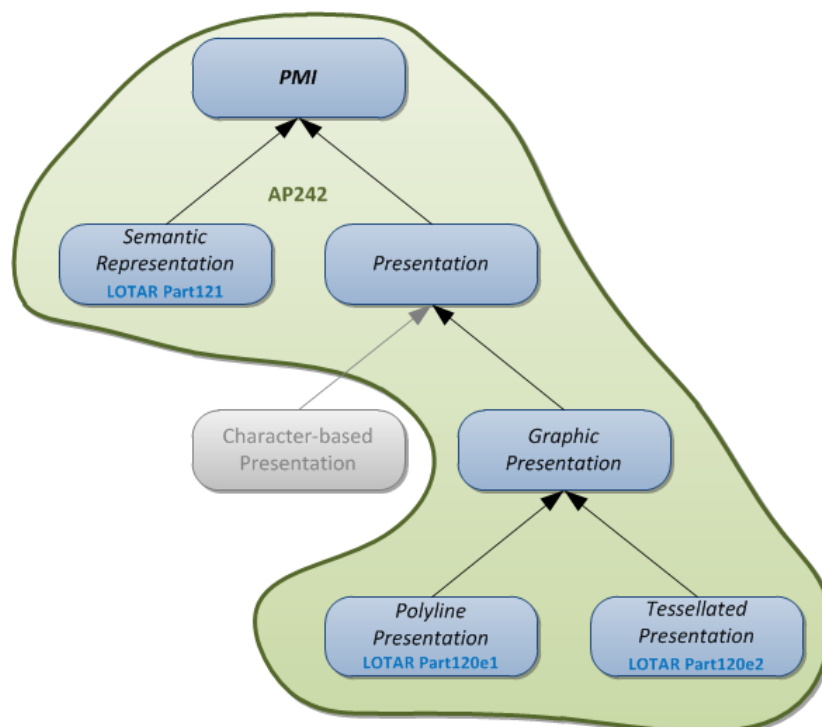
Product and Manufacturing Information (PMI) is used in 3D Computer-aided Design (CAD) systems to convey information about the definition of a product for manufacturing, inspections and sustainment, which supplements the geometric shape of the product. This includes – but is not limited to – data such as dimensions, tolerances, surface finish, weld symbols, material specifications, 3D annotations and user defined attributes.

In the context of this document, the term PMI is used synonymously with the term Geometric and Dimensional Tolerances (GD&T), as they are the main type of PMI currently in the focus of work within the CAX-IF and LOTAR projects. Other types of PMI may be covered in future extensions of this document or are covered by other already existing Recommended Practices (Material Identification and Density, User Defined Attributes).

There are several different approaches for how to convey PMI data in a STEP file. The two main classes to be distinguished are:

- **Semantic Representation:** the PMI data is stored in a machine-consumable way and includes all information required to understand the specification without the aid of any presentation elements. It facilitates the automated consumption of the data, e.g., for re-use and design updates, or for manufacturing, measurement, inspection, and other downstream applications. In STEP, Semantic Representation of PMI data as described in this document is supported by AP242 only.
- **Presentation:** the PMI data is displayed in a human-readable way, i.e., it is visible in the 3D model in an organized fashion. It facilitates comprehension of the design in order to manufacture, inspect, assemble or maintain the product described by the data. Correct interpretation of the data requires that the reader is familiar with the general type of information being presented. In STEP, there are several ways to present information in the 3D model, supported by a range of APs including AP203 Ed.2, AP214 Ed.3 and all editions of AP242. This document concentrates on the presentation approaches as supported by AP242.

The following figure gives an overview on the various approaches to convey PMI data and how they relate to each other and outlines the scope of this document. For a full definition of the terms used, please refer to Annex B.



It should be noted that this document does not adhere to any specific standard for the definition or presentation of GD&T data. The document provides recommendations as to how specific data constructions may be defined using STEP entities within a STEP Part 21 file based on AP242. If the original data adheres to a standard in the way it is defined, then the STEP definition should also adhere to that standard.

This document is not intended as a primer on geometric tolerancing. The explanations included are only provided to relate common tolerancing techniques to the STEP entity structures. This is not a comprehensive coverage of any existing Geometric Product Specification standard but does provide a capability to exchange a variety of typical models. Future versions of this document will address additional capabilities, such as the application of GD&T at the assembly level.

1.1 Document Genealogy

This document replaces several previous CAX-IF documents:

1. GD&T Usage Guide, Version 2;
published 6 December 2004
2. Recommended Practices for Dimensions, Dimensional and Geometric Tolerances;
published 6 December 2006
3. PMI Usage Guide;
published 12 June 2008
4. Recommended Practices for PMI Polyline Presentation, Version 1.0;
published 16 June 2008

This document is mostly based on the “Recommended Practices for Dimensions, Dimensional and Geometric Tolerances” listed as number 2 above. That document described the recommended practices for implementing dimensions, dimensional and geometric tolerances. It incorporated the content of the “Recommended Practices for Dimensions and Dimensional Tolerances” written by Markus Hauser, Mike Strub and Tom Hendrix, dated 18 April 2000 and the “Recommended Practices Guide for Geometric Tolerances” written by David Briggs and Tom Hendrix dated 14 March 2003. These two documents were combined to ensure a consistent approach to dimensioning and tolerancing, and conformed to the agreements reached by the Tolerance Harmonization team representing AP203, AP214, AP224, AP238 and AP240.

The current document provides additional practices to define presentation elements for GD&T data. It also incorporates updates to the method by which `shape_aspect` is linked to the geometric items of the shape definition.

Note – for PMI Polyline Presentation, this document describes the updated approaches as to be implemented using AP242. There is also new Version 2.3 of the Recommended Practices for PMI Polyline Presentation, which describes the updated approaches for AP203 Ed.2 and AP214 Ed.3.

1.2 Document Identification

For validation purposes, STEP processors shall state which Recommended Practice document and version have been used in the creation of the STEP file. This will not only indicate what information a consumer or target system can expect to find in the file, but even more important where to find it in the file.

This shall be done by adding a predefined ID string to the `description` attribute of the `file_description` entity in the STEP file header, which is a list of strings. The ID string consists of four values delimited by a triple dash ('---'). The values are:

Document Type---Document Name---Document Version---Publication Date

The string corresponding to this version of this document is:

**CAX-IF Rec.Pracs.---Representation and Presentation of Product
Manufacturing Information (PMI)---4.1---2024-06-20**

It will appear in a STEP file as follows:

```
FILE_DESCRIPTION(('...', 'CAX-IF Rec.Pracs.---Representation and Presentation of  
Product Manufacturing Information (PMI)---4.1---2024-06-20'), '2;1');
```

1.3 Availability of Test Data

Testing the correct translation and transfer of the information described in this document is a delicate task, since the success of the data exchange to a large extent depends on correct modeling of the information in the authoring tool.

To help developers achieve their tasks, the National Institute for Standards and Technology (NIST; www.nist.gov) has developed a set of test models that can be used for the development and testing of STEP interfaces for PMI.

A representative collection of PMI concepts commonly used in practice were selected from ASME Y14.5-1994 (Dimensioning and Tolerancing) and ASME Y14.41-2003 (Digital Product Definition Data Practices) from which a set of test cases were developed for determining whether CAD software correctly implements the PMI concepts. ASME Y14.5 defines the symbology used for specifying PMI. ASME 14.41 specifies how to present PMI in 2D and in 3D.

The Test Cases were peer-reviewed by several GD&T experts to ensure that PMI concepts were correctly specified according to the ASME Y14 standards, that appropriate concepts were covered, and to minimize errors and misunderstandings. The Test Cases are not intended to represent best practice in how to apply GD&T to a part. Simpler GD&T strategies could have been used. The Test Cases are intended to exercise valid presentations of GD&T defined in the ASME Y14 standards.

There are two tiers of test cases:

- **Combined Test Case (CTC)** - A Combined (or Complex) Test Case (CTC) is a combination of individual PMI annotations to be tested. The CTCs are not complete specifications of the parts' PMI, but rather contain only the PMI needed to specify enough context information to understand the respective concepts. Typically, this means one or more examples of each PMI, along with any datum features referenced. Although useful for conformance testing, they are not "realistic" in that they include only certain types of PMI in each model.
- **Fully-Toleranced Test Case (FTC)** - An FTC is a fully-toleranced Test Case where the intent is to have all the geometric features fully toleranced in the context of GD&T. This means that each tolerancing feature on a model is adequately controlled and constrained by tolerances that comply with the applicable dimensioning, tolerancing, and modeling standards. Each FTC includes as many annotation types and constructs needed to fully control and constrain each feature relative to one or more datum reference frames.
- **Simplified Test Cases (STC)** – The STCs were derived from the FTCs by removing PMI constructs that had no direct mapping to either the native CAD systems or the STEP data model, i.e., where an exact transfer was not achievable. The models instead focus on common-practice PMI.

There are five different CTC models (CTC-01 to CTC-05), six different FTC models (FTC-06 to FTC-11), and five different STC models (STC-06 to STC-10).

Each model is available in the respective native formats for varying versions of the following CAD systems:

- Autodesk; Inventor
- Dassault Systèmes; CATIA V5-6
- Dassault Systèmes; SolidWorks
- PTC; Creo
- Siemens PLM; NX

The models can be downloaded from <https://go.usa.gov/mGVm>.

2 Scope

The following are within the scope of this document:

- Definition of PMI data (namely GD&T) as Semantic Representation applied to boundary representation (B-Rep) solid models (precise geometry)
- Transfer of PMI data as Graphic Presentation, i.e., Polyline or Tessellated, as supported by AP242
- Organization of Presentation elements in Saved Views
- Linking of Semantic Representation data structures to Graphic Presentation data structures for the same PMI elements
- Specification of PMI-related Validation Properties:
 - for Graphic Presentation
 - for Semantic Representation
 - for Editable Text Notes

The following are out of scope for this document:

- Application of Semantic Representation data for PMI to tessellated geometry
- Definition of User Defined Attributes (see separate document)
- Specification of Material Properties (see separate document)
- Transfer of PMI data as Graphic Presentation, i.e., Polyline, as supported by AP203 Ed.2 and AP214 Ed.3 (see separate document)
- Specification of Validation Properties for other aspects of the model which are described in separate Recommended Practices, such as:
 - Geometry and Assembly Structure
 - User Defined Attributes
 - 3D Tessellated Geometry

3 Fundamental Concepts

There are two main methods of tolerancing: dimensional tolerancing and geometric tolerancing.

3.1 Dimensional Tolerancing

Dimensional tolerancing is the least complex of the two methods of applying tolerances. It is also called “direct tolerancing of dimensions” because a tolerance can be specified only where a dimension is defined. Direct dimensioning and tolerancing address the acceptable range of values of an individual dimension of a manufactured object. Direct tolerancing amounts to generalizing the single value of a dimension to be a range.

3.2 Geometric Tolerancing

Geometric tolerances are the more complex of these two types. A geometric tolerance specifies a geometric region, such as an area or a volume, in which the realized feature must lie in order to meet the design criteria. Geometric tolerancing separates the specification of tolerance from the dimensioning, thus allowing more flexibility and allowing more precise controls that relate more directly to the form, fit and function of the part. This document covers the recommended usage and implementation of geometric tolerances defined in Application Integrated Construct (AIC) 519.

A tolerance describes a constraint on the acceptable deviation of an engineered object from the ideal design. Tolerances are applied to the geometric aspects or features of a part, such as edges, faces and holes.

The fundamental principles of geometric tolerances can be found in national and international standards such as ANSI Y14.5M or ISO 5459.

3.3 STEP Entity Types

There are several subtypes of the `geometric_tolerance` entity, which are not mutually exclusive. For example, tolerances that reference datums are of type `geometric_tolerance_with_datum_reference`. Tolerances that include a modifier such as maximum material condition are of type `geometric_tolerance_with_modifiers`. Many typical engineering tolerances combine these. In these cases, complex entities instances will occur in the Part 21 file.

3.4 Representation and Presentation of Information

This document defines two aspects for the definition of such data within a Part 21 file. The two aspects are representation and presentation. “Representation” provides the semantic, computer interpretable aspects of the data. Presentation describes how the data can be displayed in a viewing application and is human readable.

Note: PMI Representation (semantic) data shall only be used when exchanging exact geometry. It is not intended to be associated with tessellated geometry.

Two forms of presentation data are in general defined for PMI data within STEP: Graphic Presentation and Character-based Presentation. This document describes Graphic Presentation, which means that the display characteristics of the data are defined with simple geometric entities – polylines and arcs, or tessellated geometry.

3.5 Dimension and Tolerance

Dimension is a term for a specification of the value of a parameter of some aspect of the shape of a mechanical part or assembly. A dimension can be implied by the geometric model, or it can be explicitly modeled, which is what this guide covers. The term dimension can also refer to the numerical value itself; however, in this document the term value is used.

Tolerance is a general term for the permitted variations in the shape of manufactured parts. Tolerance establishes the limits for how the actual form or measurements of a manufactured object can vary from the ideal design intent.

3.6 Dimensions and Dimensional Tolerances

The dimensions and dimensional tolerances addressed in this document are:

- directional dimensions
- location dimensions such as angular, curved, or linear distances
- size dimensions such as angular, thickness, or other
- the association of dimensions with geometry
- the representation of dimensional tolerances including:
 - plus or minus deviations
 - maxima, minima, and nominal dimensions
 - limits and fits
 - significant digits
- the association of dimensional tolerances with dimensions

3.7 Geometric Tolerances

The geometric tolerances addressed in this document are:

- Angularity
- Circular Runout
- Circularity/Roundness
- Coaxiality/Concentricity
- Cylindricity
- Flatness
- Parallelism
- Perpendicularity
- Position
- Profile of a line
- Profile of a surface
- Straightness
- Symmetry
- Total Runout

Tolerance modifiers such as maximum and minimum material condition, regardless of feature size and projected tolerance zone, are also addressed.

3.8 Feature Entities and Attributes

Dimensions and dimensional tolerances are applied to aspects of the product shape. The product and product shape are modeled as in other geometry and PDM applications.

GD&T features in STEP are modeled as `shape_aspect` entities. The term “feature” in some dimensioning standards is reserved for definitional elements that lie in the surface of the part. In such cases, a term such as “derived element”, is used for derived geometry. In computing systems and in some dimensioning standards, either is called a feature, and these are distinguished as “integral” feature and “derived” feature. In this recommendation, all are modeled as shape aspect. For integral features, `shape_aspects.product_definitional=.T.` (TRUE). For derived elements it is `shape_aspects.product_definitional=.F.` (FALSE).

3.9 Identifying Features

The surface of a part can be partitioned into many smaller features, to which dimensions are applied. Normally a feature boundary corresponds to a locus of discontinuities of surface curvature, as when a straight side encounters a corner fillet. For the purposes of GD&T, every point on the surface is either in the interior of one feature or on the boundary of two or more features. When a finished part is measured, each point of the surface belongs to exactly one feature.

It is sometimes convenient to treat as a single feature as a union of these natural geometric features. Unions can be disjoint, for example:

- a pattern of holes
- a surface that is “interrupted” by a slot.
- the two sides of a slot

Unions can be made of contiguous features for example:

- the all-around shape of an irregular hole.

Similarly, it may be necessary to identify a restricted region of a feature, for example:

- where a tighter tolerance is required
- to indicate how a finished piece is mounted on an inspection fixture

3.9.1 Data Elements of the Representation of GD&T Features and Derived Elements

It is recommended that when available the `advanced_face` be used for representing a feature, since its topology is well-defined.

Derived center elements such as points, curves, and surfaces may be unbounded and can be represented by geometry primitives. In GD&T the derived elements are implicitly bounded where they intersect another feature of a part. Any `geometric_representation_item` or `topological_representation_item` could potentially be incorporated into a feature or derived element’s representation.

3.10 Datum Systems

Some types of tolerances refer to one or more datums to represent the requirements on the shape. Datum systems provide a reference system for describing requirements on the product shape. This section provides a definition of terms; see sections 6.5 and 0 for the implementation of datum, datum features and datum targets in AP242.

3.10.1 Datums

A datum is a theoretically exact geometric reference, i.e., an exact point, line or plane, to which tolerance features are related. A datum is the origin from which the location or geometric characteristics of features of a part are established. A datum may be based on one or more datum features of a part.

3.10.2 Datum Features

Datum Features are tangible features of a part, for example a face that provides a reference system for measurements of the actual part. Datum Features must lie on the physical boundary of the shape. Consequentially, Datum Feature entities are related to topological entities that represent those boundaries in the solid model such as an `advanced_face`.

3.10.3 Datum Targets

A datum Target designates a specific point, line or area of contact on a part that is used in establishing a data reference frame (definition from ANSI Y14.5). It differs from a datum feature in that it identifies a restricted region of a feature, i.e., a point, line or area of a surface rather than a topological feature. Typically, two or more datum target elements are used to define a theoretical datum.

4 Defining the Dimensioning Standard

Different dimensioning standards define the visual representation and interpretation of the symbolology of the tolerances. For the receiving system to create the correct visual representation of the tolerance, the dimensioning standard must be known. This information is captured as an `applied_document_reference` which applies the referenced document, i.e., the dimensioning standard, to the `product_definition` of the part. In addition, an `application_context` is required when there is geometric dimension and tolerance information present in the physical file. These concepts are shown in Figure 1 and Figure 2.

```
#8640=APPLIED_DOCUMENT_REFERENCE(#8632,'',(#8629));
#8632=DOCUMENT(' ',' ',' ',#8631);
#8631=DOCUMENT_TYPE('configuration controlled document version');
#8629=PRODUCT_DEFINITION_CONTEXT('',#8627,'design');
#8627=APPLICATION_CONTEXT('geometrical dimensioning and tolerancing representation');
```

Note: if an ASME standard is specified, the tolerance principle is assumed to be the envelope requirement unless otherwise specified. Likewise, if an ISO standard is specified, the tolerance principle of independence is assumed. See Table 5 in section 5.2.1 for details.

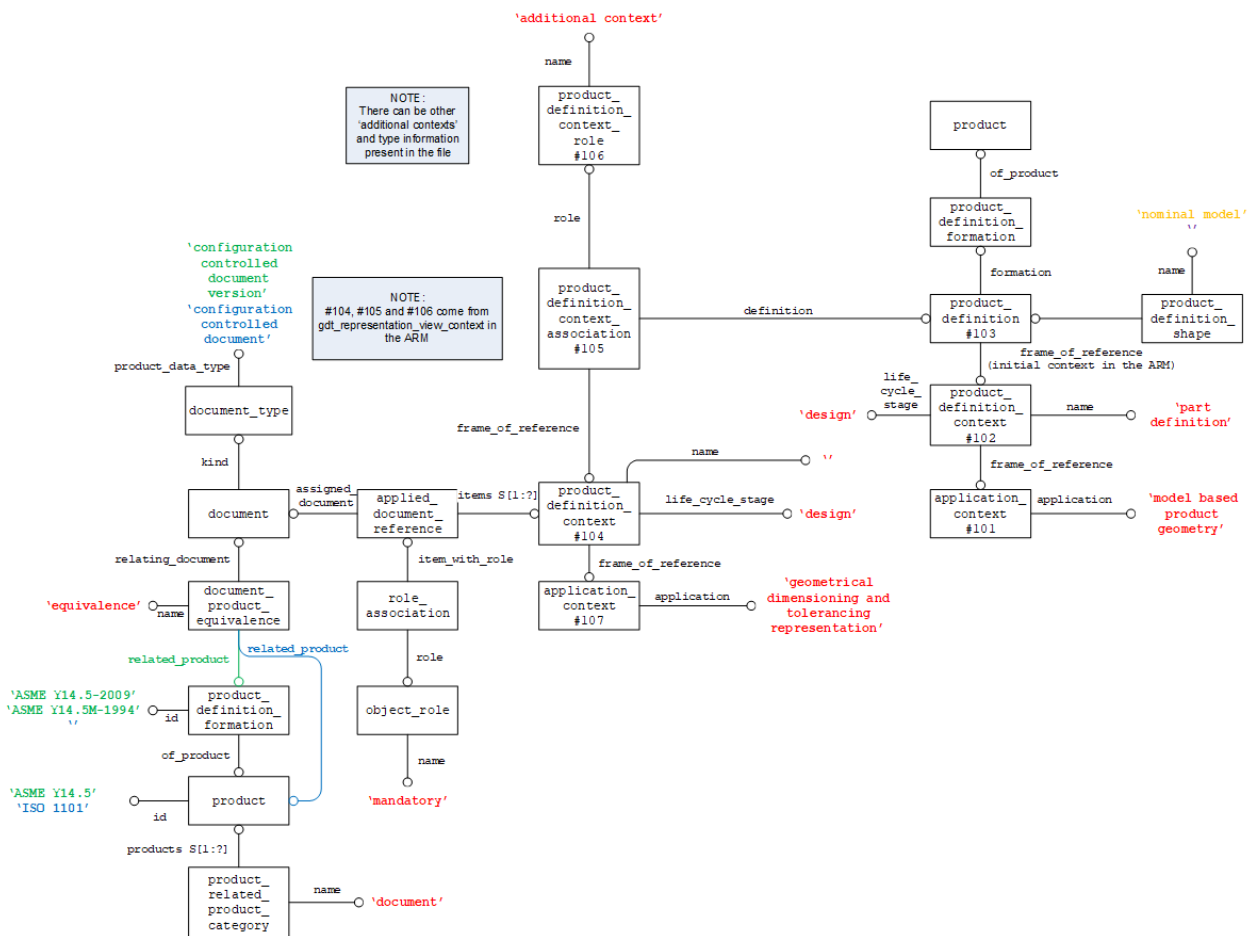


Figure 1: Choice of Dimensioning Standard (representation)

4.1 Default Tolerance Decimal Places

The construct to convey the default tolerance decimal places to be used for the product is illustrated below in Figure 3.

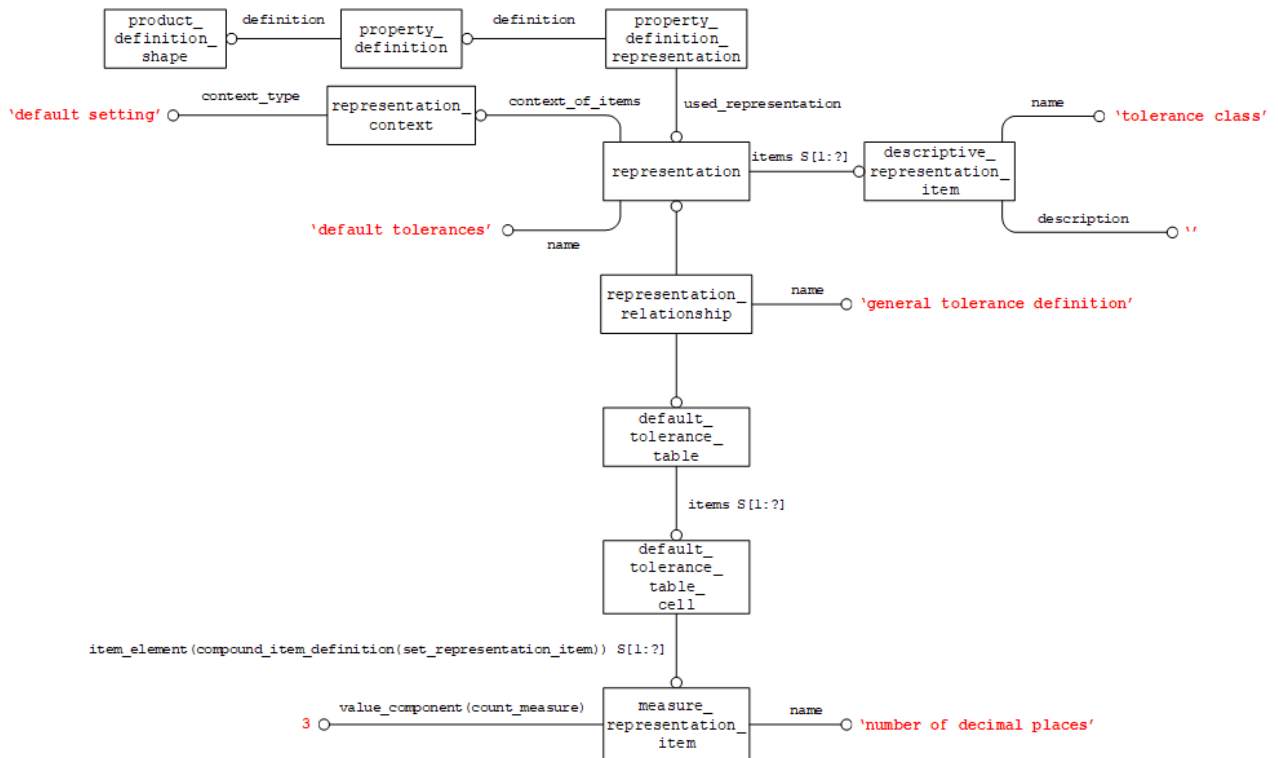


Figure 3: Default Tolerance Decimal Places

The number of decimal places specified above (i.e., 3) will be applied to all dimension values unless otherwise specified (see section 5.4).

Some CAD systems will interpret only qualified values and ignore all values without a specified number of decimal places on import. The following hierarchy applies for the definition of the precision:

- Check for precision defined at tolerance value (see section 5.2.3, Figure 19)
- If none is given, check precision defined at nominal value (see section 5.4)
- If no qualification is given, use the default value (see Figure 3 above).

4.1.1 A Note on Rounding

The number of decimal places is set to restrict the length of decimal number to a meaningful number of digits. Giving a dimension of 1.618033988749895 inches might be mathematically precise, but pointless from an engineering point of view. So, whenever a value has more digits after the decimal point than defined by the parameter above, the number needs to be rounded or truncated. And this introduces a potential for errors, as there are different, conflicting rules for how to do that.

- ASME standards generally prefer rounding to an even number. In the case of 9/16 for instance, which is 0.5625, the correct value to show with three decimal places would be 0.562. The same would be true if the original value were 0.5615.
- ISO standards typically round to the nearest number, i.e., if the last digit is a 5, round to the next higher number. In the case of 9/16, the correct value to show with three digits would be 0.563.
- However, ISO standards technically allow both ways; it is a business decision which rule to follow.

So, depending on how the standards are applied, it is easy to imagine a case where the sending system shows 0.562 and the receiving system shows 0.563, but still, both would be correct. However, resolving this ambiguity is out of scope of this document.

4.2 Global Uncertainty

The modeling tolerance is specified by a global uncertainty defining the maximum value for when 2 points are considered equal. An example Part 21 snippet of this construct is illustrated below:

Part 21 Example

```
#12=(LENGTH_UNIT()NAMED_UNIT(*)SI_UNIT(.MILLI.,.METRE.));  
#13=(NAMED_UNIT(*)PLANE_ANGLE_UNIT()SI_UNIT($,.RADIAN.));  
#14=(NAMED_UNIT(*)SI_UNIT($,.STERADIAN.)SOLID_ANGLE_UNIT());  
#15=UNCERTAINTY_MEASURE_WITH_UNIT(LENGTH_MEASURE(0.005),#12,  
  'distance accuracy value',$) ;  
#16=(GEOMETRIC_REPRESENTATION_CONTEXT(3)  
  GLOBAL_UNCERTAINTY_ASSIGNED_CONTEXT((#15))  
  GLOBAL_UNIT_ASSIGNED_CONTEXT((#12,#13,#14))  
  REPRESENTATION_CONTEXT('','')) ;
```

5 Implementation Guidelines for Dimensional Tolerances

5.1 Associating Dimensions with Features or Geometry

Dimensional tolerances are attached to the items of geometry or topology that the dimension applies to. This is done by means of a subtype of the `shape_aspect_relationship` Entity, i.e., `dimensional_location`, or by means of a `dimensional_size` entity. The identification of the type of tolerance is done via a specified string in the “name” attribute of the Dimensional Location or Dimensional Size entities. Note that Angular Dimensions are an exception to this, being defined by the Angular Location and Angular Size entities. The mappings for the Dimensional Tolerance types to the required string are shown in Table 1 and Table 3.

Note the combination of the `shape_aspect` entity, `geometric_item_specific_usage` entity and the `geometric_representation_item`, i.e., `advanced_face`, are unique. If another geometric dimension or tolerance references the same `advanced_face` entity, the same `shape_aspect` entity and `geometric_item_specific_usage` should be used as well. This rule should be followed for all such relationships throughout this document.

Note: In AP242, there is a uniqueness rule on each of `shape_aspect`, `dimensional_location`, `dimensional_size` and `shape_aspect_relationship` which requires the attribute pair (`id`, `of_shape`) to be unique if the `id` attribute exists. There is also a global rule requiring uniqueness of the `id` attribute across the population of a collection of the above entity types if the `id` attributes exist. The `id` attribute is derived, i.e., it is populated by adding an instance of `id_attribute`, which has the `id` string as its `attribute_value` and any of the aforementioned entity types as `identified_item` while observing the uniqueness rule for all `ids` defined on the same shape.

There are a few exceptions to the recommendation for adding `id_attributes` to each `shape_aspect`, most notably `general_datum_reference` and all its subtypes, as `general_datum_reference`'s where rules WR1, WR2 and WR3 require the `name`, `description` and `id` attributes inherited from `shape_aspect` to be empty or unset.

Figure 4 illustrates the instantiation of the `id_attribute`:

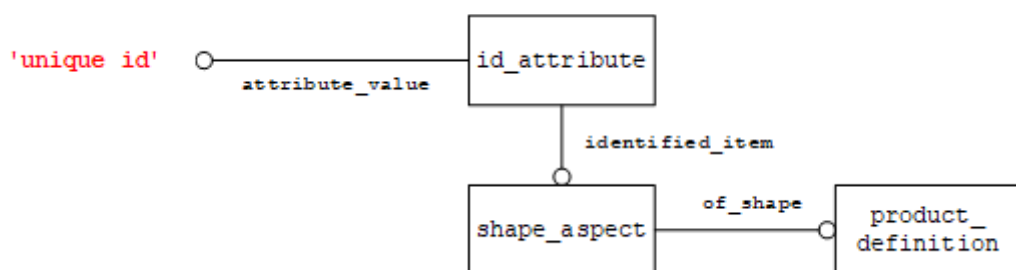


Figure 4: Unique Id Instantiation

Note if a single feature is made up of multiple `geometric_representation_item` entities, the structure illustrated in Figure 5 should be used. An example use of this concept is a cylindrical hole represented by 2 faces, where each face represents half of the cylindrical hole.

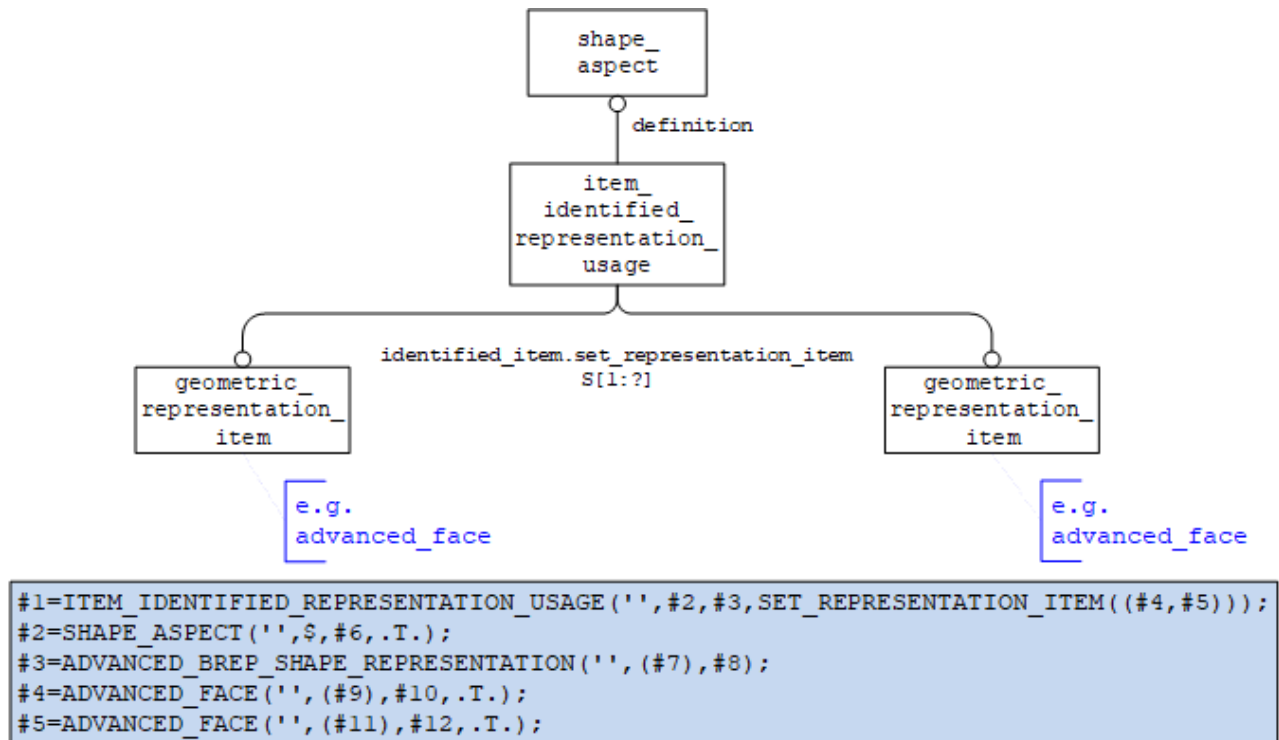


Figure 5: Multiple Geometric Items Representing Single Feature

This rule should be followed for all such relationships throughout this document. A preferred alternate approach for this relationship, favored by some postprocessors, would be to combine the multiple `advanced_face` entities representing the single geometric feature into a single `advanced_face`. This operation would be performed by the preprocessor before exporting to STEP. Otherwise, postprocessors might combine neighboring `advanced_face` entities of the same underlying surface into one.

5.1.1 Dimensional Location

For the `dimensional_location` entity, the items between which the dimension applies are defined by `shape_aspects`. This is shown in Figure 6.

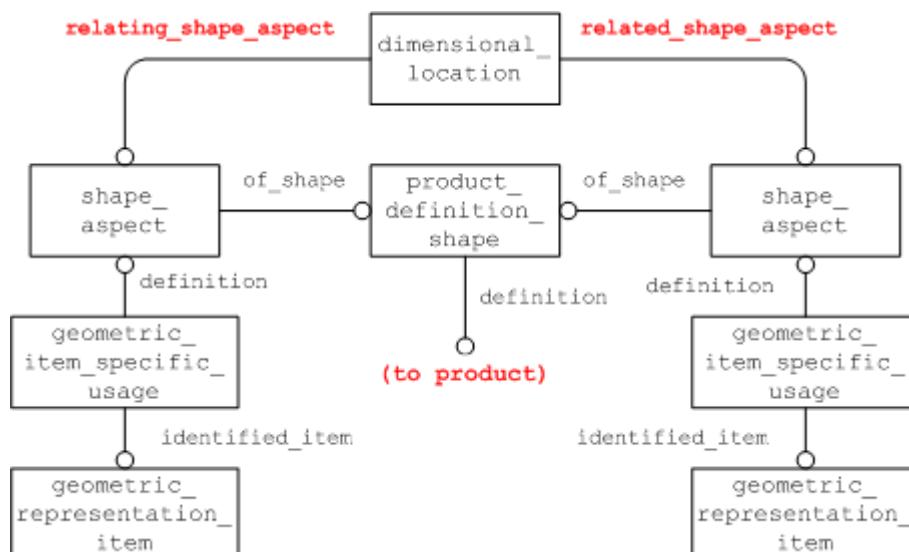


Figure 6: Attaching to Dimensioned Entities

Note this is only applicable if the shape aspects are unambiguous, otherwise refer to section 5.1.4.

Note also that the same structure is applied for the specialized subtypes of Dimensional Location, namely “Dimensional Location with Path” and “Directed Dimensional Location”. The former of these provides a “path” for the measurement to follow by means of a `shape_aspect` (see Figure 13), the latter provides additional semantics to the “Related” and “Relating” attributes of the `dimensional_location`, i.e., the measurement is to occur in the direction from the “relating” shape aspect to the “related” shape aspect.

Dimensions that map to a Dimensional Location are:

Dimensional Location	<code>dimensional_location.name</code>
Curved Distance	'curved distance'
Linear Distance	'linear distance'

Table 1: Dimensional Location Types (no circular cross-section)

The values listed in Table 1 are to be used when the objects being dimensioned do not have a circular cross-section. For a dimension between objects with a circular cross-section the values in Table 2 should be used to differentiate between the desired locations. An example of this type of dimension is illustrated in Figure 7.

For the mixed case, defining a dimension between one circular feature and one non-circular feature such as an edge for instance, the last three values listed in Table 2 apply.

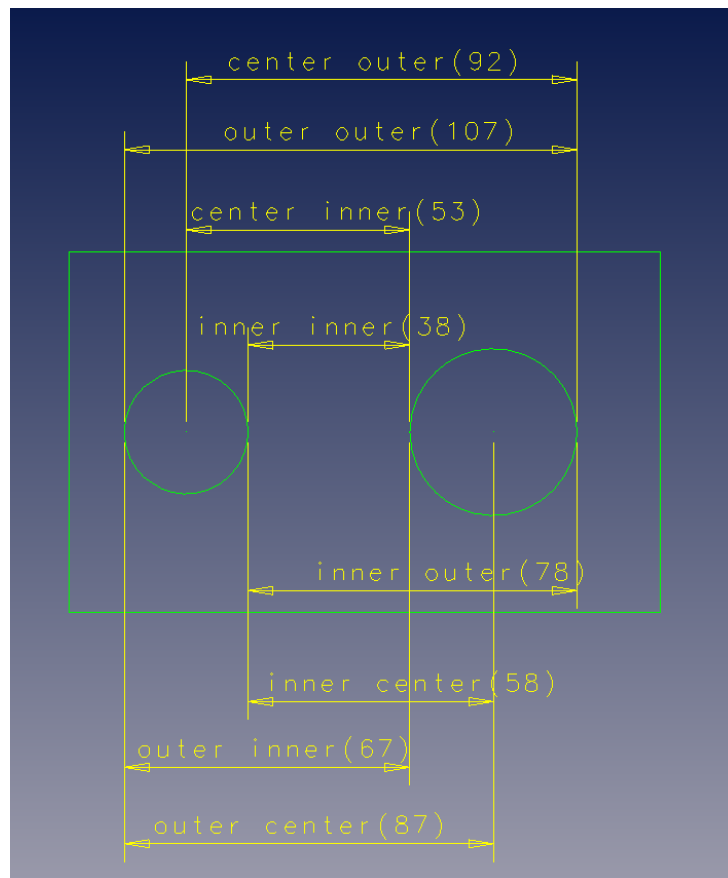


Figure 7: Dimensional Location Examples (with diameter)

Dimensional Location	dimensional_location.name
From center to outer	'linear distance centre outer'
From center to inner	'linear distance centre inner'
From outer to center	'linear distance outer centre'
From outer to outer	'linear distance outer outer'
From outer to inner	'linear distance outer inner'
From inner to center	'linear distance inner centre'
From inner to outer	'linear distance inner outer'
From inner to inner	'linear distance inner inner'
From or to center	'linear distance centre'
From or to inner	'linear distance inner'
From or to outer	'linear distance outer'

Table 2: Dimensional Location Types (circular cross-section)

Note: By default, a dimensional location between objects with a diameter is defined from each center point so the value 'linear distance' is used.

5.1.2 Angular Location

To define an angular dimension between 2 features, the subtype `angular_location` of `dimensional_location` should be used. There is an additional attribute named `angle_selection` that defines the measured angle as an enumeration with valid values of `.EQUAL.`, `.LARGE.`, and `.SMALL.`

Note: If the specified angle is equal to or less than 180 degrees, the interpretation is direct. If the specified angle is larger than 180 degrees, the interpretation is the reflex angle.

5.1.3 Oriented Dimensional Location

To define a `dimensional_location` in a certain orientation the structure illustrated in

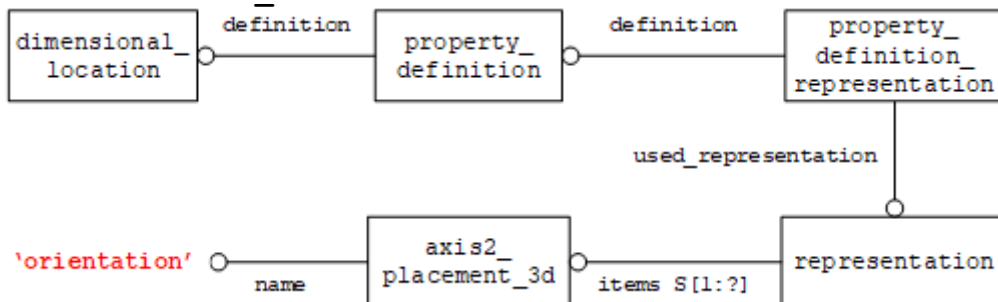


Figure 10 should be used. The direction defined by the x axis of the `axis2_placement_3d` entity is the orientation of the `dimensional_location` entity. This concept is useful to distinguish between the two dimensions illustrated below:

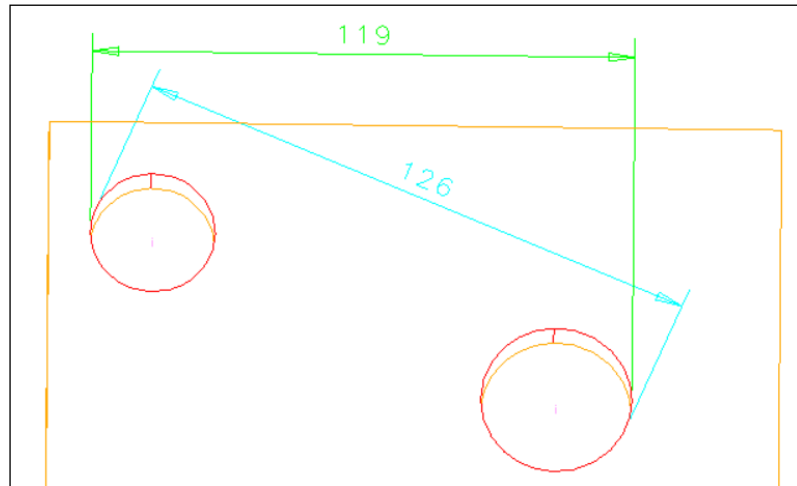


Figure 8: Example Oriented Dimensional Location

The dimension in cyan is the default orientation between the outer sides of the two cylindrical features. However, the dimension in green has a user defined orientation. Figure 9 illustrates the recommended instantiation:

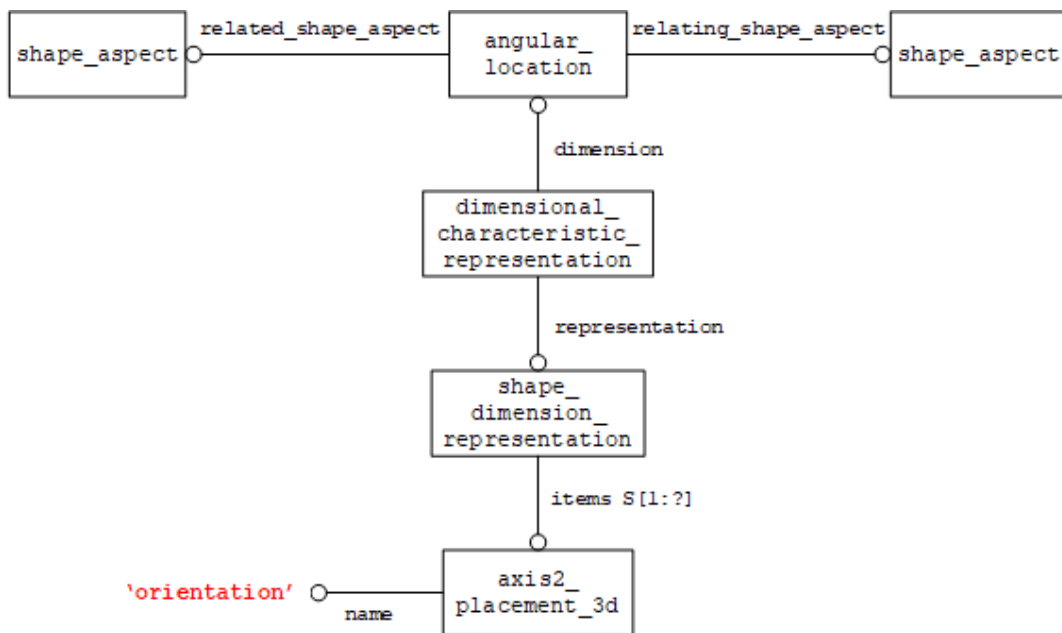


Figure 9: Oriented Angular Location Instantiation

Note: Older implementations may use the instantiation shown in

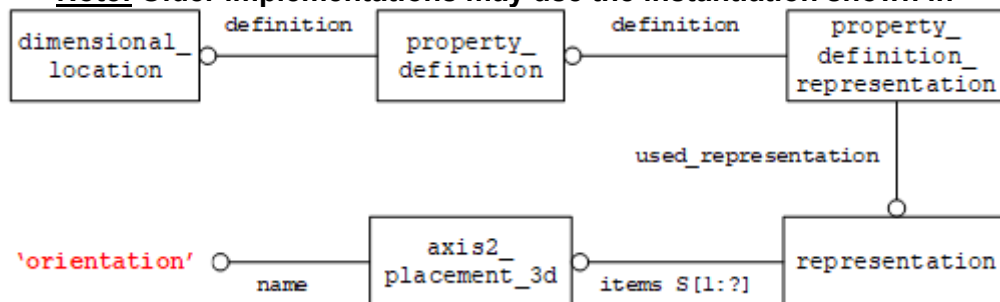


Figure 10 below. This structure is not recommended for export but must be supported on import for compatibility reasons.

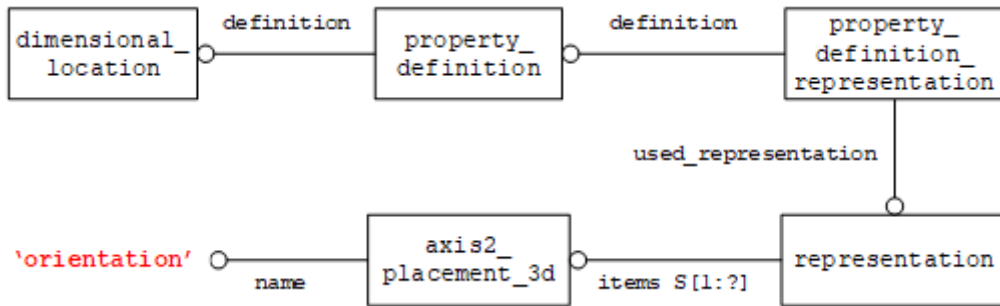


Figure 10: Oriented Dimensional Location Instantiation

5.1.4 Derived Shapes

The preceding figure (Figure 6) shows the attachment of the Representation Items that form either end of the `dimension_location` to the Geometric or Topological entities at those points. In some cases, a Representation Item may not exist for that location in the model, e.g., the centre of a hole, so in this case a `derived_shape_aspect` will need to be created to provide an anchor point. In these cases, the additional entities required are shown in Figure 11.

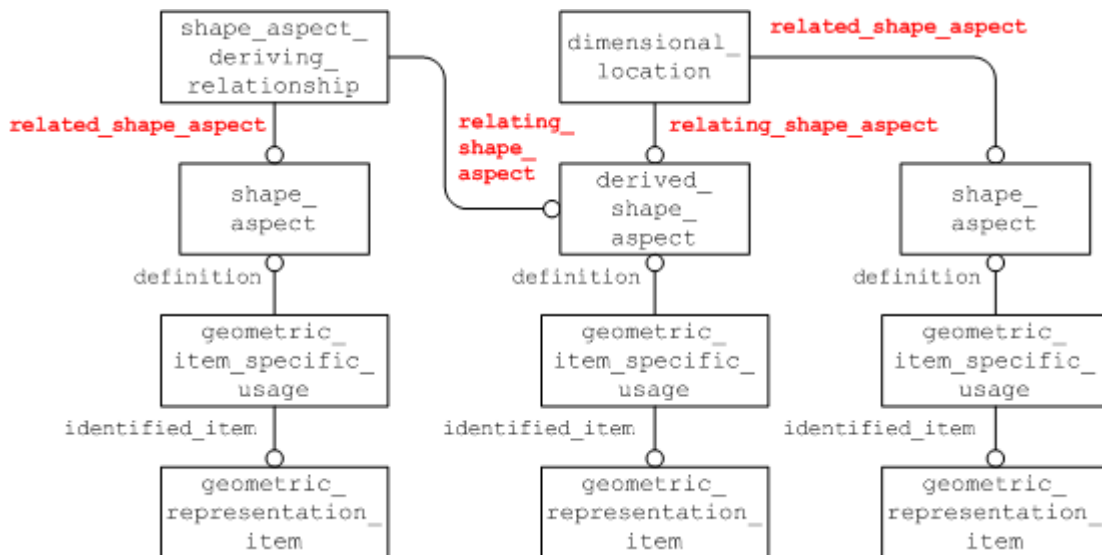


Figure 11: Derived Shape Aspect Instantiation

Note that this illustration is a change from that of the original document which can be found in Appendix 1.

Under certain conditions, a specialized subtype of the `derived_shape_aspect` should be used. These conditions are listed in Table 3. Under any other conditions, the plain `derived_shape_aspect` entity should be used. It is recommended, but not obligatory, that a meaningful string for the type of derivation be entered in the “name” attribute of this entity.

Condition	STEP Entity Used
Apex of a Cone	apex
Centre of a Symmetrical Feature	centre_of_symmetry
Geometric Alignment of two Features	geometric_alignment
Perpendicular to Feature	perpendicular_to
Spatial Extension to Feature	extension
Tangential to Feature	tangent
Parallel Offset from Feature	parallel_offset

Table 3: Types of Derived Shape

Note the derived `geometric_representation_item` entities should be placed into a `constructive_geometry_representation` entity. This concept is covered in the Recommended Practices for Supplemental Geometry.

Important Note: One area where this concept will be used frequently is dimensioning between holes or shafts and identifying locations on the surfaces to dimension between. In this case the simplest method to use would be to define two `cartesian_point` entities as `derived_shape_aspect` entities related to the `advanced_face` entities referencing the `cylindrical_surface` entities. Referencing supplemental geometry in dimensions is an important concept and will be critical to ensure association of all geometric dimensions and tolerances to their respective features.

5.1.5 Dimensional Size

The Dimensional Size Entity is used where the measurement only applies to one object, rather than being a measurement between two distinct geometric or topological features. Note that this “one object” can, under certain circumstances, be a composite of several `shape_aspect` entities. This will be illustrated in a later section. Figure 12 shows how a Dimensional Size Entity is attached to the representation object of which it is a dimension.

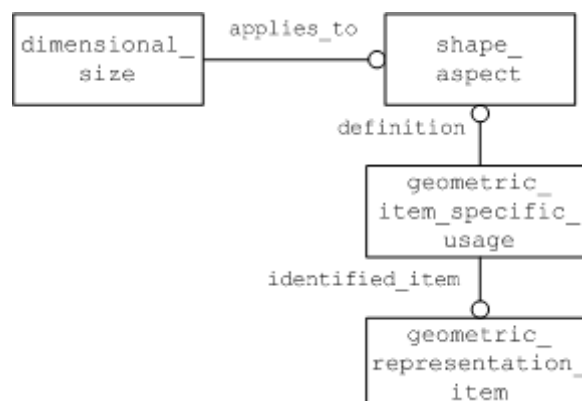


Figure 12: Dimensional Size Instantiation

Note that the same structure is applied for the specialized subtype of Dimensional Size, namely “Dimensional Size with Path”. This provides a “path” for the measurement to follow by means of a `shape_aspect` (see Figure 13).

Dimensions that map to Dimensional Size are:

Dimensional Size	<code>dimensional_size.name</code>
Curve Length	'curve length'
Diameter	'diameter'
Spherical Diameter	'spherical diameter'
Radius	'radius'
Spherical Radius	'spherical radius'
Toroidal Minor Diameter	'toroidal minor diameter'
Toroidal Major Diameter	'toroidal major diameter'
Toroidal Minor Radius	'toroidal minor radius'
Toroidal Major Radius	'toroidal major radius'
Toroidal High Major Diameter	'toroidal high major diameter'
Toroidal Low Major Diameter	'toroidal low major diameter'
Toroidal High Major Radius	'toroidal high major radius'
Toroidal Low Major Radius	'toroidal low major radius'
Thickness	'thickness'

Table 4: Dimensional Size Types

5.1.6 Angular Size

To define an angular dimension on a single feature, the subtype `angular_size` of `dimensional_size` should be used. There is an additional attribute named `angle_selection` that defines the measured angle as an enumeration with valid values of `.EQUAL.`, `.LARGE.` and `.SMALL.`

Note: If the specified angle is equal to or less than 180 degrees, the interpretation is direct. If the specified angle is larger than 180 degrees, the interpretation is the reflex angle.

5.1.7 Dimensional Location/Size with Path

For some measurements, a path for the measurement needs to be defined, for example, when measuring the linear distance between two points on a curved surface. In this case, the measurement would need to follow the curve of the surface and not be the shortest straight-line distance between the two points. In order to convey this information, this specialized subtype has an additional attribute, "path", which points to a `shape_aspect` defining the path the measurement is to take. The instantiation of this is shown in Figure 13.

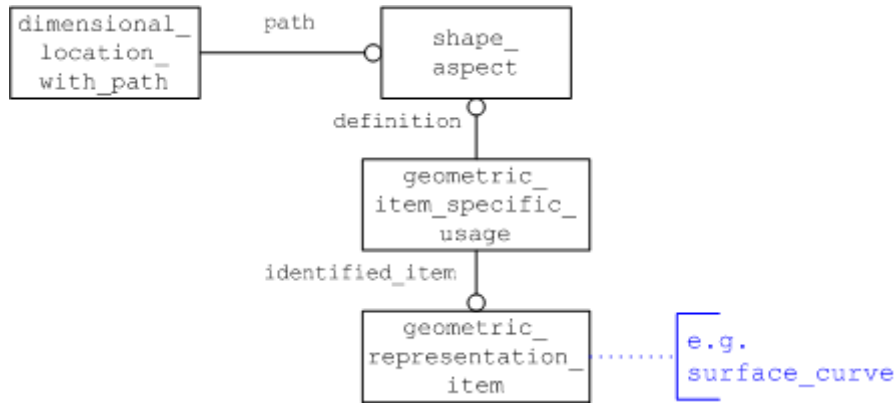
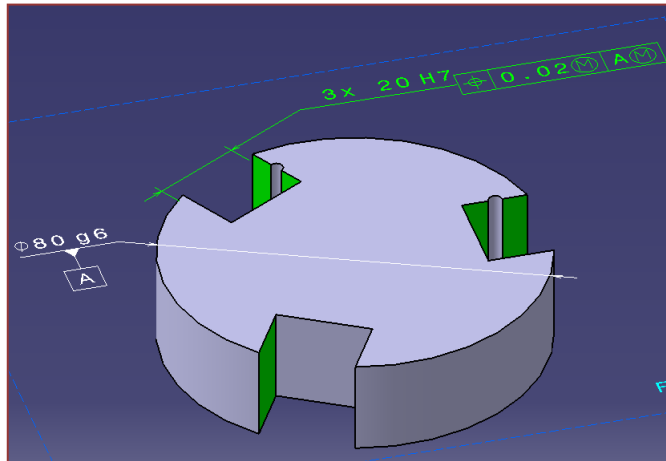


Figure 13: Dimension With Path Instantiation

5.1.8 Dimension Applied to Pattern of Tabs/Slots

Several PMI features can be grouped into a pattern, so that the dimension needs to be defined only once but applies to all constituents in the same way. This implies all elements in the pattern need to have the same specification.



The instance diagram for how to apply a dimension to a pattern of tabs/slots is illustrated below in Figure 14.

Note that there is a slightly different instantiation in case the dimension is combined with a datum. This is defined in section 6.5 below.

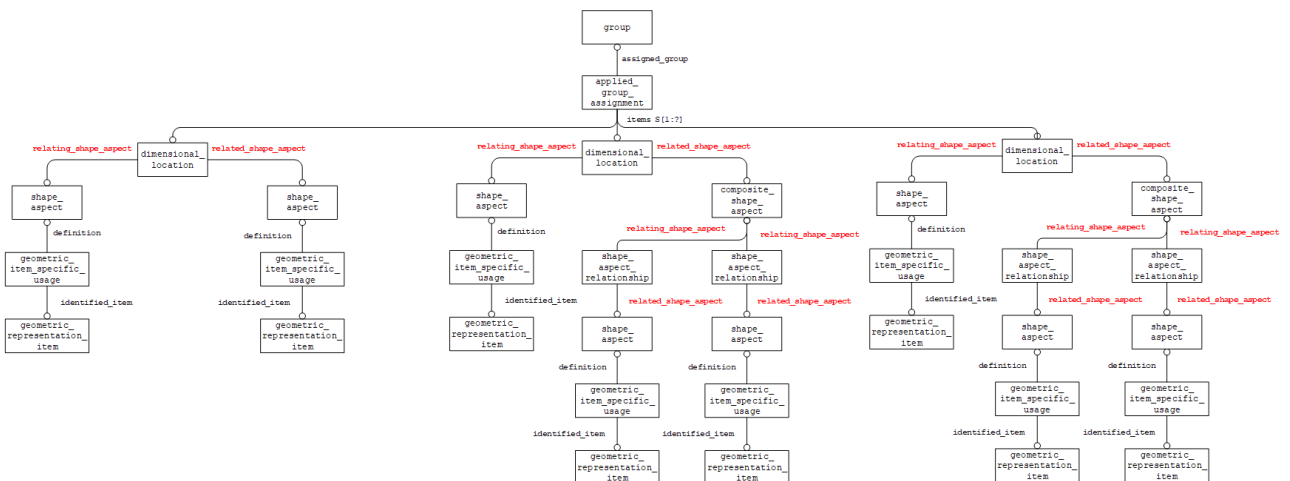


Figure 14: Dimension Applied to Pattern of Tabs/Slots

5.1.9 Dimensions Applied to Compound Features

Compound features such as countersunk and counterbore are modeled in STEP as machining features. Since machining features are not covered in this document and not fully supported by AP242 edition 1, a workaround is required to apply dimensions to these constructs. The agreed upon method for semantic representation of a compound feature dimension is to create multiple dimensions. Each dimension defines a specific characteristic of the compound feature. As an example, a counterbore would be represented as two separate dimensions, one defining the bore diameter and the other defining the bore depth. For countersunk and tapered counterbore, an additional dimension would be added to define the angle. Currently there is no relationship between the dimensions defining a compound feature.

5.2 Application of Values to Identified Tolerances

Once you have identified the tolerance and attached it to the relevant pieces of geometry or topology as shown in the previous section, you can assign the tolerance value. The types of values and modifiers/qualifiers that can be applied are:

- nominal value
- nominal value with qualifier
- nominal value with plus/minus bounds
- value range
- tolerance class

5.2.1 Nominal Value

The structure for a dimension with a nominal value is illustrated in Figure 15. It is identified by the `measure_representation_item.name = "nominal value"`. This value shall always be given, even if no value range is defined (see section 5.2.4 below).

Note that the `dimensional_location` referred to in the diagram could also be a `dimensional_size` entity.

Note the `length_measure_with_unit` could also be a `plane_angle_measure_with_unit` entity.

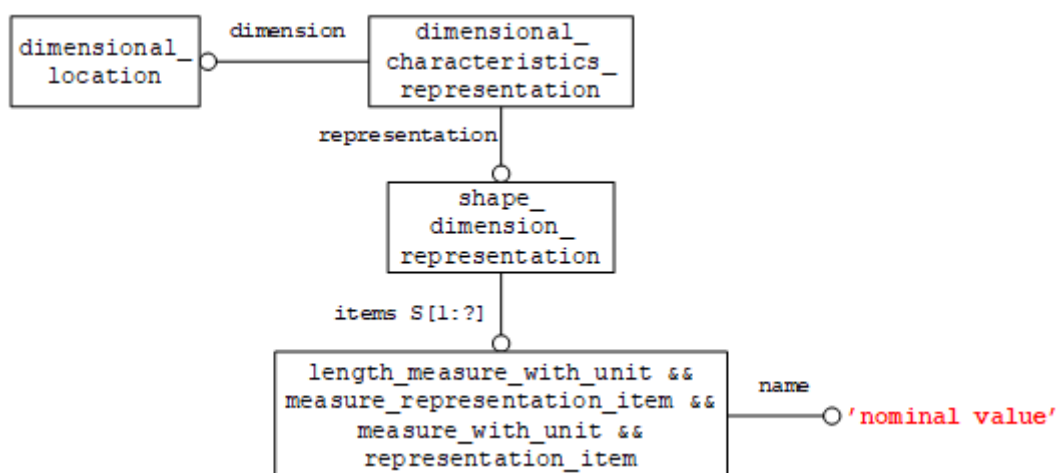


Figure 15: Nominal Value Instantiation

The name attribute in `shape_dimension_representation` carries significance in its value as defined below in Table 5 for the tolerance principle used.

Tolerance Principle	<code>shape_dimension_representation.name</code>
Independency (ASME) [D]	'independency'
Envelope Requirement (ISO) [E]	'envelope requirement'
Use default as specified in section 4	" (empty string)

Table 5: Tolerance Principle

5.2.2 Nominal Value with Qualifier

In this case, a nominal value is applied to the dimension, i.e., a set value for the measurement, without any tolerance bounds. However, the value can be limited as to whether it is a Maximum value or Minimum Value. There may be other limits allowed, and as the limit maps to a String in the Part21 Instantiation, there is no restriction on what value can be entered. An example of this type of dimension is illustrated below:

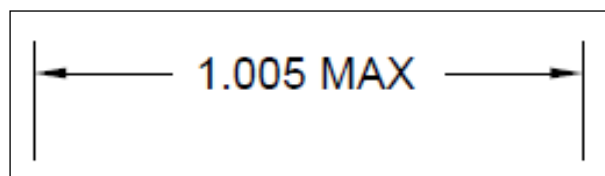


Figure 16: Example Nominal Value with Qualifier

The entity used to apply a qualifier to a dimension value is `type_qualifier` and it has a single attribute of type string as illustrated in Figure 17. A `qualified_representation_item` is required to reference this new entity.

Note the `dimensional_location` referred to in the diagram could also be a `dimensional_size` entity.

Note the `length_measure_with_unit` referred to in the diagram could also be a `plane_angle_measure_with_unit` entity.

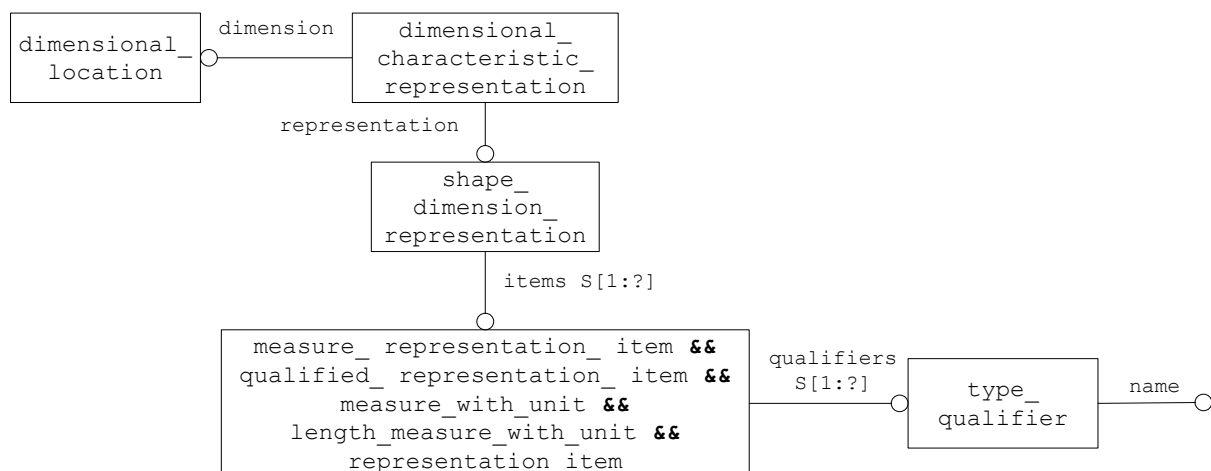


Figure 17: Nominal Value with Qualifier Instantiation

The types of qualifiers and the valid values for the `name` attribute are illustrated in Table 6.

Value Qualifier	<code>type_qualifier.name</code>
Maximum Value	'maximum'
Minimum Value	'minimum'
Average Value	'average'

Table 6: Value Qualifiers

5.2.3 Nominal Value with Plus/Minus Bounds

If a tolerance is represented as a Nominal value with a set of plus and minus deviations or bounds to that tolerance, then the entities shown in Figure 19 are used to instantiate the STEP file. An example of this type of dimension is illustrated below:

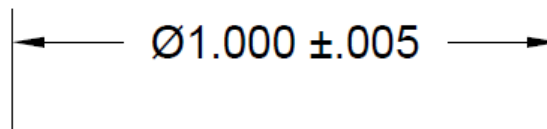


Figure 18: Example Nominal Value with Plus/Minus Bounds

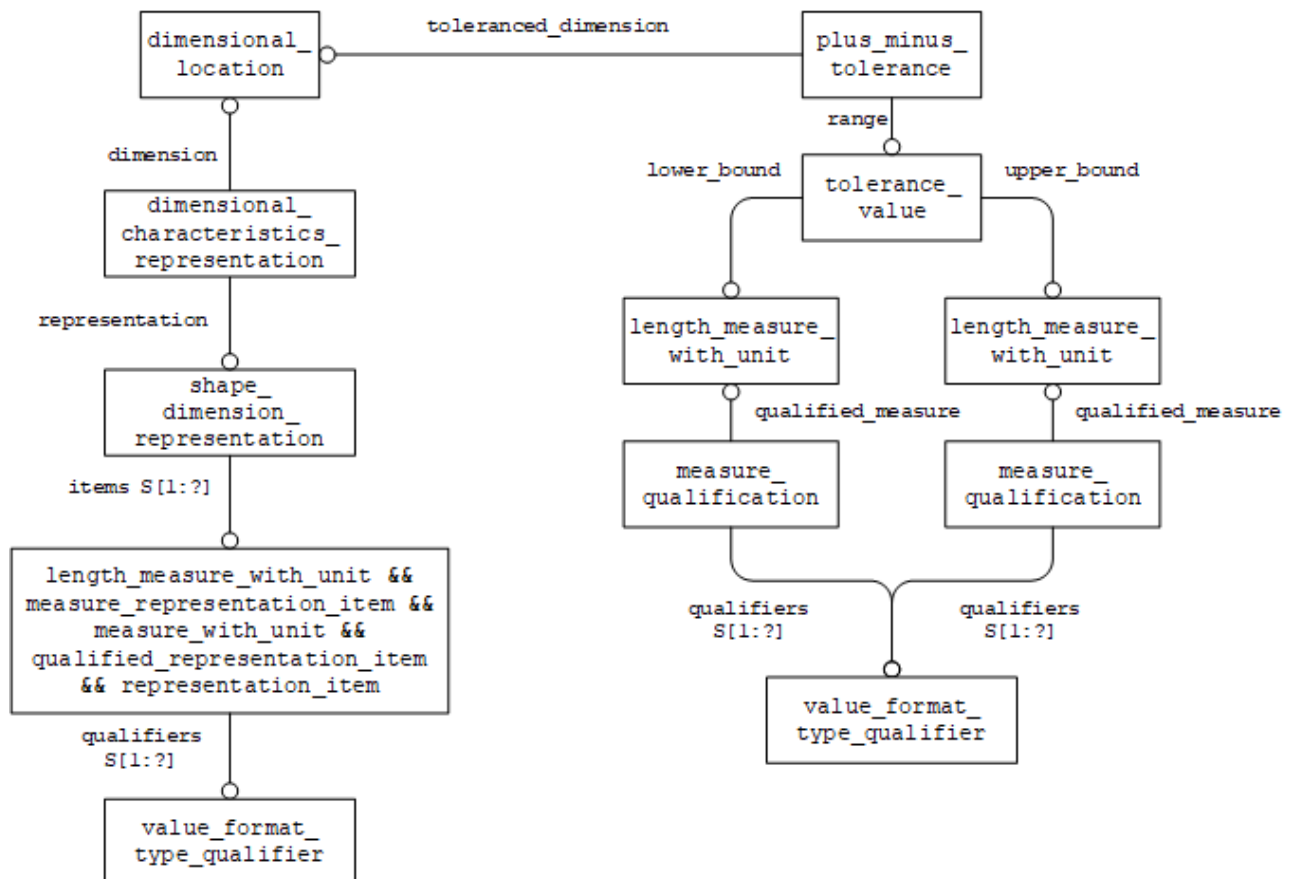


Figure 19: Nominal Value with Plus/Minus Bounds Instantiation

The values of the plus/minus tolerance are found in the `measure_with_unit` entities referred to by the “upper” and “lower” attributes of the `tolerance_value` entity. In order to define the number of decimal places for the tolerance values, instances of `measure_qualification` can be attached linking to the applicable qualifiers. The tolerance values can have their own definitions or share the value format type qualifier from the nominal value.

Note that for clarity, even though it is given that the `tolerance_value` is an upper or lower limit, the value should still be given as an offset from the nominal. For example, the lower limit should usually be a negative number and the upper limit a positive number.

Note that it is possible to have two positive numbers or two negative numbers. The only requirement is that the upper bound value is greater than the lower bound value.

5.2.4 Value Range

An alternative way of presenting, rather than representing the dimension, is as a range of values that is the extents of the tolerance applied. As originally mapped in the Standard, this would give two values, one for the upper limit and one for the lower limit. Upon implementation, however, it was found that the majority of CAD systems hold the tolerance value as a nominal, with a plus/minus deviation, and handle the presentation of this data separately, thus the lack of a nominal value through this method caused problems for re-importing the data, as this value was lost. In order to alleviate this, a third value, representing the nominal value was added to the mapping. An example of this type of dimension is illustrated below:

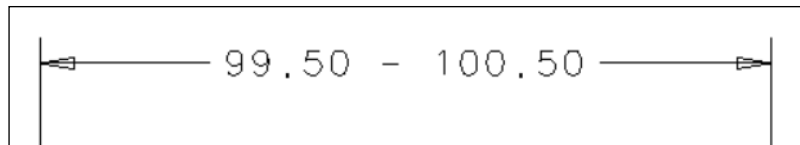


Figure 20: Example Value Range

The STEP instantiation of this is shown in Figure 21.

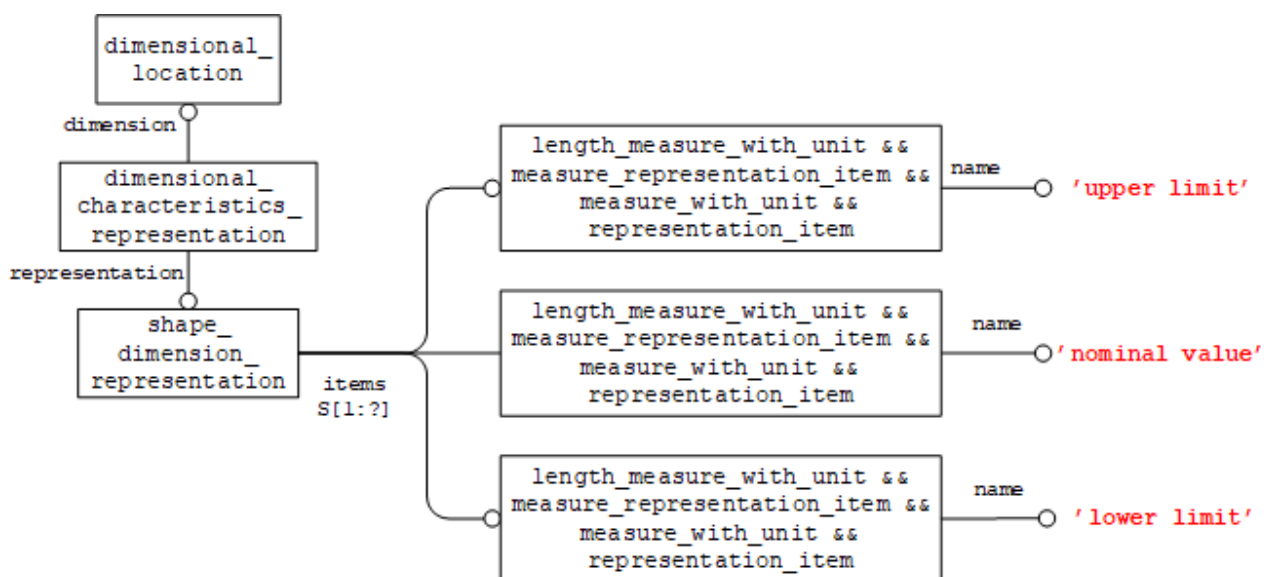


Figure 21: Value Range Instantiation

To determine which of the `measure_representation_items` denotes which value, they shall be identified by one of the following strings used for the `representation_item.name` attribute: “nominal value”, “upper limit”, and “lower limit”.

5.2.5 Tolerance Class

An example of a tolerance class dimension is illustrated below:

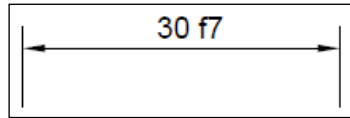


Figure 22: Example Tolerance Class

The implementation of this type of dimension uses the `limits_and_fits` entity as illustrated in Figure 23. The `form_variance` attribute represents the fundamental deviation or “position letter” of the ISO 286 limits-and-fits tolerance classification. Only symbols defined in ISO 286 shall be provided. The symbols “A” to “ZC” for holes or “a” to “zc” for shafts may be used to classify deviation. The `zone_variance` attribute represents the kind of fitting to which the tolerance applies. The value of this attribute need not be specified. Normally the tolerance applies to an external or internal feature.

Where applicable, the following values shall be used:

“hole”: the tolerance applies to an internal feature

“shaft”: the tolerance applies to an external feature

Whether the tolerance applies to an interior or exterior feature can be determined from the position letter of the fundamental deviation, therefore `zone_variance` need not be specified. The `grade` attribute represents the quality or the accuracy grade of a tolerance. Only symbols defined in ISO 286 shall be provided. The `grade` is one of the 18 international standard tolerance grades defined in ISO 286. The `source` attribute is not populated at this time.

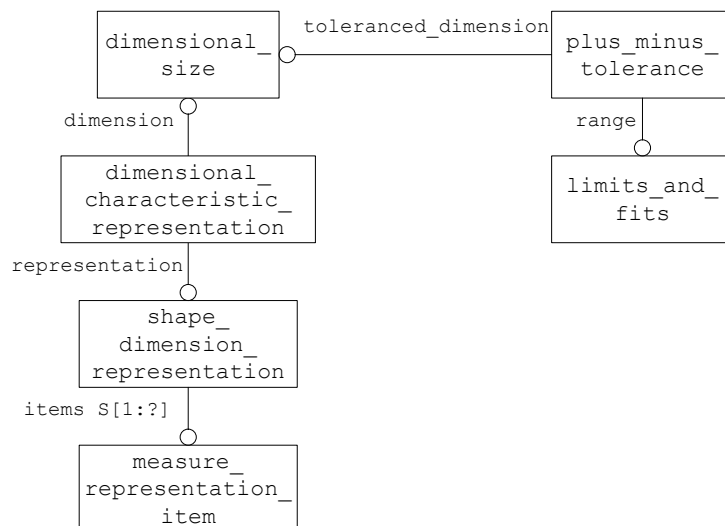


Figure 23: Tolerance Class Instantiation

5.3 Dimension Modifier

Examples of dimensions with modifiers are illustrated below:

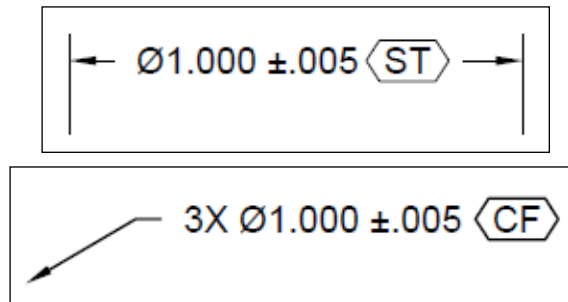


Figure 24: Example Dimension Modifier

To describe these dimension modifiers, a `descriptive_representation_item` entity can be used as illustrated in Figure 25.

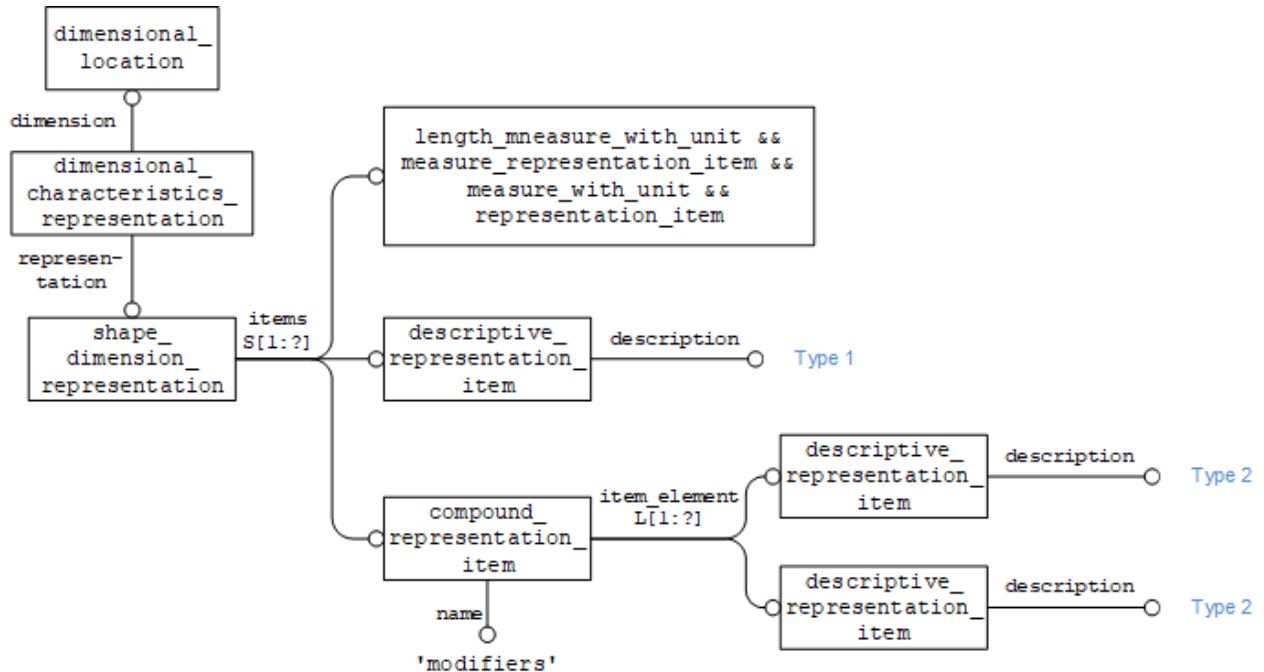


Figure 25: Dimension Modifier Instantiation

Note the `dimensional_location` referred to in the diagram could also be a `dimensional_size` entity.

Note the `length_measure_with_unit` referred to in the diagram could also be a `plane_angle_measure_with_unit` entity.

Note `representation_item.name` should be set to 'dimensional note'

















Note `compound_representation_item.name` shall be 'modifiers' and its `list_element` shall be of type `list_representation_item`.

As you may notice, there are two types of modifiers used for dimensions, the first type is limited to the kind of dimension it is. There can be only one `descriptive_representation_item` (type 1) entity associated with a dimension. The types of modifiers and valid values for the type 1 description attribute are shown in Table 7.

Dimension Modifier (type 1)	descriptive_representation_item.description
Basic (ASME) / Theoretical (ISO)	'theoretical'
Reference (ASME) / Auxiliary (ISO)	'auxiliary'

Table 7: Dimension Modifiers (type 1)

There can be multiple type 2 modifiers associated with a single dimension so the `compound_representation_item` entity is used to group them. The types of modifiers and valid values for the type 2 description attribute are shown in Table 8.

Dimension Modifier (type 2)	Symbol	descriptive_representation_item.description
Controlled Radius ¹	CR	'controlled radius'
Square ²	□	'square'
Statistical Tolerance		'statistical'
Continuous Feature		'continuous feature'
Two Point Size		'two point size'
Local size defined by a sphere		'local size defined by a sphere'
Least-squares association criterion		'least squares association criteria'
Maximum inscribed association criterion		'maximum inscribed association criteria'
Minimum circumscribed association criterion		'minimum circumscribed association criteria'
Circumference diameter (calculated size)		'circumference diameter calculated size'
Area diameter (calculated size)		'area diameter calculated size'
Volume diameter (calculated size)		'volume diameter calculated size'
Maximum size		'maximum rank order size'
Minimum size		'minimum rank order size'
Average size		'average rank order size'
Median size		'median rank order size'
Mid-range size		'mid range rank order size'
Range of sizes		'range rank order size'
Any restricted portion of feature	/Length	'any part of the feature'
Any cross section	ACS	'any cross section'
Specific fixed cross section	SCS	'specific fixed cross section'

Dimension Modifier (type 2)	Symbol	descriptive_representation_item.description
Common tolerance	CT	'common tolerance'
Free-state condition	ⓕ	'free state condition'
United feature of size	UF	'united feature of size'
Between	↔	Not a modifier, see section 6.4.3

Table 8: Dimension Modifiers (type 2)

Notes:

1. 'Controlled Radius' represents an important requirement. However, while most of the modifiers listed in Table 8 are suffixes for presentation, CR is a prefix.
2. 'Square' is just a presentation construct to state that the same dimension shall be applied twice perpendicularly. The semantic representation for it are two dimensions at a 90° angle.

5.4 Applying Number of Decimal Places

The displayed tolerance value can be truncated to a given number of decimal places, by specifying a Value Format Type Qualifier which holds the tolerance value. This is done using a complex entity for the `measure_representation_item`, containing the `qualified_representation_item` entity, which in turn points to a `value_format_type_qualifier`, which specifies the number of places to the right and left of the decimal point by its `format_type` attribute.

Note: The correct number format for display is to some extent given by the applied dimension standard (see section 4.1.1) and the unit system used for the PMI elements. For instance, metric values shall be displayed as '0.5', while imperial values shall be displayed as '.5'.

Note: The Value Format Type Qualifier is not only for presentation; its information can be used for other purposes as well.

This may lead to cases where the implied number format, and the one explicitly given by the value format type qualifier, are contradicting. However, some companies may have their own presentation standards which are not line with international standards. The recommendation is that an explicitly defined number format shall always overrule the one implicitly defined by the dimensioning standard and the units of measure.

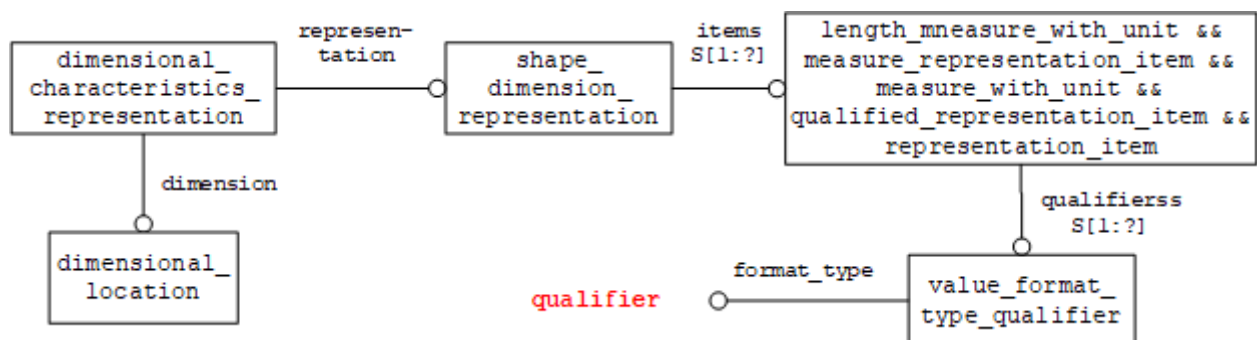


Figure 26: Decimal Places

The values for x and y in Figure 26 define the number of places to the left and right of the decimal point respectively, as defined in ISO 13584-42.

Notes:

- NR2 stands for a real number with no exponent.
- y always truncates the value
- Some qualifiers are more appropriate depending on applied ASME or ISO standards
- Signed qualifier (NR2S) suggested for dimension tolerances

Qualifier	Note	Value	Example	Result
NR2 x.y	Adds trailing and leading zeros	0.5625	NR2 1.3	0.562
		0.5625	NR2 0.3	.562
		0.25	NR2 1.3	0.250
NR2..x.y	No trailing and leading zeros	1.25	NR2..3.3	1.25
		0.5625	NR2..3.3	.562
NR2S x.y	Same as 'NR2 x.y', may include sign	1.5	NR2S 1.3	+1.500
NR2S..x.y	Same as 'NR2..x.y', may include sign	-1.5	NR2S..3.3	-1.5

Table 9: Value Format Type Qualifier Examples

Note that the NIST STEP File Analyzer and Viewer can interpret the truncation as rounding instead which might be appropriate for some models or company standards.

6 Implementation Guidelines for PMI Representation

The following sections will provide recommendations on how to associate with tolerances with

1. Features
2. Dimensions
3. At the Part level
4. Multiple Features

6.1 Associating Tolerances with Features

In STEP, the tolerance entities are associated with a `shape_aspect` that identifies the tolerance feature. The feature is identified by a `shape_aspect`. In the case of a solid boundary representation model, the feature of the part is represented by one or more `geometric_representation_items` such as `advanced_face` entities. For a single item, `geometric_item_specific_usage` will be used to define the shape aspect, as shown in Figure 27 below.

Note: CAD systems supporting multiple bodies per part might also associate tolerances at the body-level but need to consider that this information might get lost during exchange with other CAD systems that do not support this structure.

A feature can be made up of more than one geometric element, for example a through hole in a solid model might be represented by two semi-circular surfaces, each an `advanced_face` entity. In this case, an instance of `item_identified_representation_usage` is used to combine multiple `geometric_representation_items` into a single `shape_aspect`. Figure 5 in section 5.1 above shows an example for this structure.

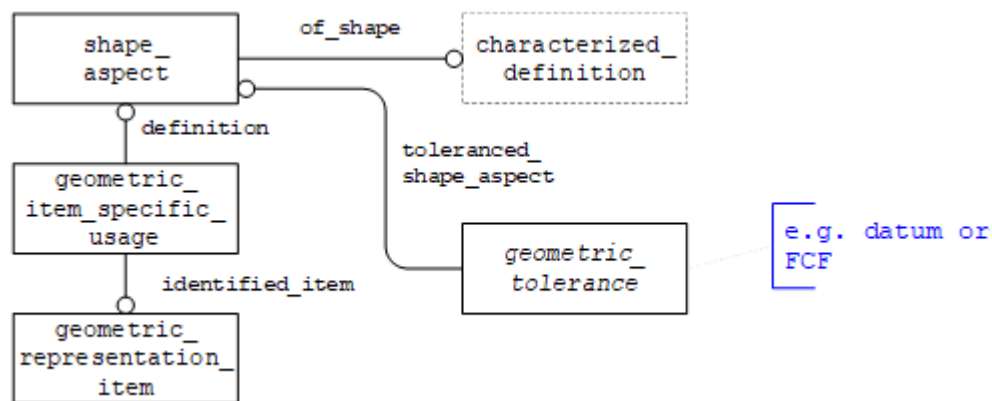


Figure 27: Defining Toleranced Features using Shape_Aspect

Part 21 Example

```
#187=ADVANCED_FACE('feature face',(#181),#186,.T.);
#252=PRODUCT_DEFINITION_SHAPE('',$,#17);
#315=SHAPE_ASPECT('',$,#252,.T.);
#316=GEOMETRIC_ITEM_SPECIFIC_USAGE('','flatness tolerance face',
    #315, #199, #187);
#320=FLATNESS_TOLERANCE('#320',$,#319,#315);
```

6.2 Associating Tolerances with Dimensions

Instead of referencing a `shape_aspect` entity, a tolerance may reference a `dimensional_location` entity or a `dimensional_size` entity to represent the concept illustrated below:

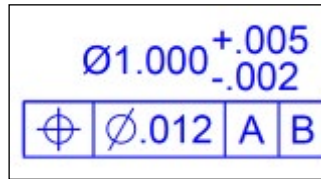


Figure 28: Example Tolerance with Dimension

6.3 Associating Tolerances with Part (All-Over / Default Tolerance)

There are two approaches to support the concept of “all-over” as illustrated below. Which one applies depends on the applied dimensioning standard, wording in the title block, and sometimes the CAD system. In some cases, the “all-over” tolerance is presented as FCF on the 3D model, as shown in Figure 29:

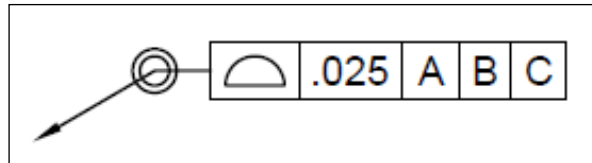



Figure 29: Example Tolerance with Part (all-over)

In other cases, the information is given in the title block or similar textual information on the model, as indicated by item number 4 in Figure 30, which is taken from NIST’s FTC-06 test model (see section 1.3):

3. APPLICABLE STANDARDS:
 ASME Y14.41-2003 APPLIES TO DATASET.
 ASME Y14.5M-1994 APPLIES TO DIMENSIONING
 AND TOLERANCING.
4.  .05 A B C APPLIES TO ALL
 UNTOLERANCED SURFACES.
5. UNITS: INCHES

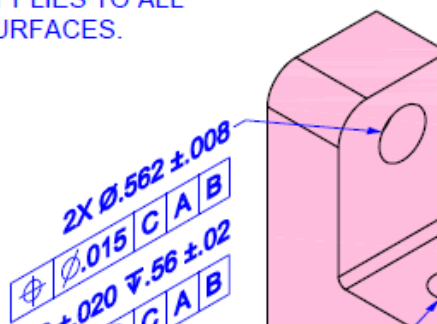


Figure 30: Definition of a default tolerance in the title block

Implementation in STEP:

- If the wording is “applies to all surfaces”, the tolerance shall be applied at part level, i.e., the `geometric_tolerance` entity will point to the respective `product_definition_shape`.
- If the wording is “applies to all untoleranced surfaces” or “unless otherwise specified”, all surfaces for which no other tolerance of the same type is defined shall be collected in a `composite_group_shape_aspect` in the same way as when tolerancing multiple features, as described in section 6.4 below.

6.4 Associating Tolerances with Multiple Features

There are many cases where a Tolerance or Datum needs to be associated with more than one feature, for example, when a face based on the datum geometry has been split by a slot or other feature. In these cases, the associated features are combined under a `composite_group_shape_aspect`. Figure 31 shows the STEP Entities required to implement this functionality. In order to distinguish this case from the “Pattern of Features” case (see below), the name attribute of the `composite_group_shape_aspect` shall be set to the string “multiple elements”.

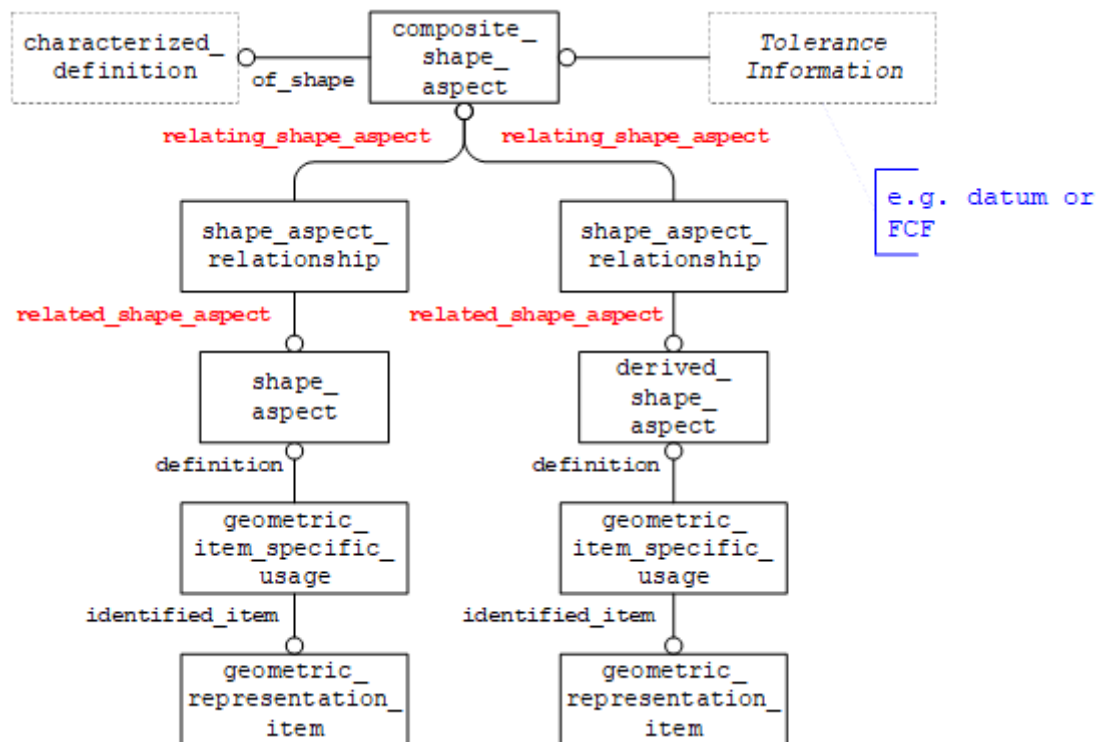


Figure 31: Multiple Feature Construct

Part 21 Example

```
#10341=PRODUCT_DEFINITION_SHAPE('', $, #17);
#10396=SHAPE_ASPECT('', $, #10341, .T.);
#10403=GEOMETRIC_ITEM_SPECIFIC_USAGE('', 'single feature', #10396,
#5500, #5423);
#10400=SHAPE_ASPECT('', $, #10341, .T.);
#10403=GEOMETRIC_ITEM_SPECIFIC_USAGE('', 'single feature', #10400,
#5500, #5411);
#10404=COMPOSITE_GROUP_SHAPE_ASPECT('', 'multiple elements',
#10341, .T.);
#10405=SHAPE_ASPECT_RELATIONSHIP('', $, #10404, #10396);
#10406=SHAPE_ASPECT_RELATIONSHIP('', $, #10404, #10400);
```

6.4.1 Associating tolerances with a Pattern of Features

One of the uses of the Multiple Feature construct is allowing the exchange of Tolerances applied to a pattern of features. In order to differentiate this from the normal case, the string “pattern of features” is used to populate the `composite_group_shape_aspect.description` attribute.

For example: `#299=COMPOSITE_GROUP_SHAPE_ASPECT('', 'pattern of features', #246, .T.);`

6.4.2 Applying All Around Modifier

There is a subtype of the `composite_shape_aspect` entity called `all_around_shape_aspect` which can be used to represent the concept illustrated below:



Figure 32: Example Tolerance with All Around Modifier

6.4.3 Applying Between Modifier

There is another subtype of the `composite_shape_aspect` entity called `between_shape_aspect` which is used to convey the concept illustrated below:

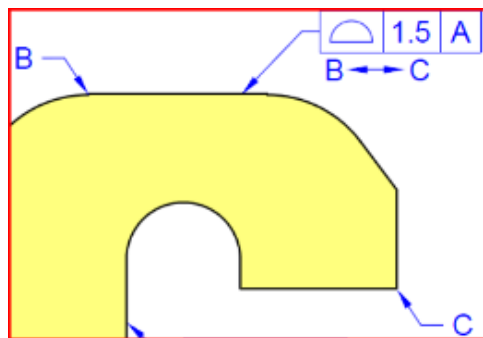


Figure 33: Example Tolerance with Between Modifier

A sample instantiation of this construct is illustrated in Figure 34. The approach in general is to not relay the instructions “from here to here”, but to define the resulting restricted area. The start and end features may be given in addition when they apply. The start and end features defined by the `geometric_representation_item` would typically be an `edge_curve` but could be an `advanced_face`. Other implementations could reference supplemental geometry to define the start and end features. To define the restricted area and to satisfy the case when the affected area spans multiple faces, the `connected_face_set` is used. The final implementation of the between modifier is dependent on the CAD system representation.

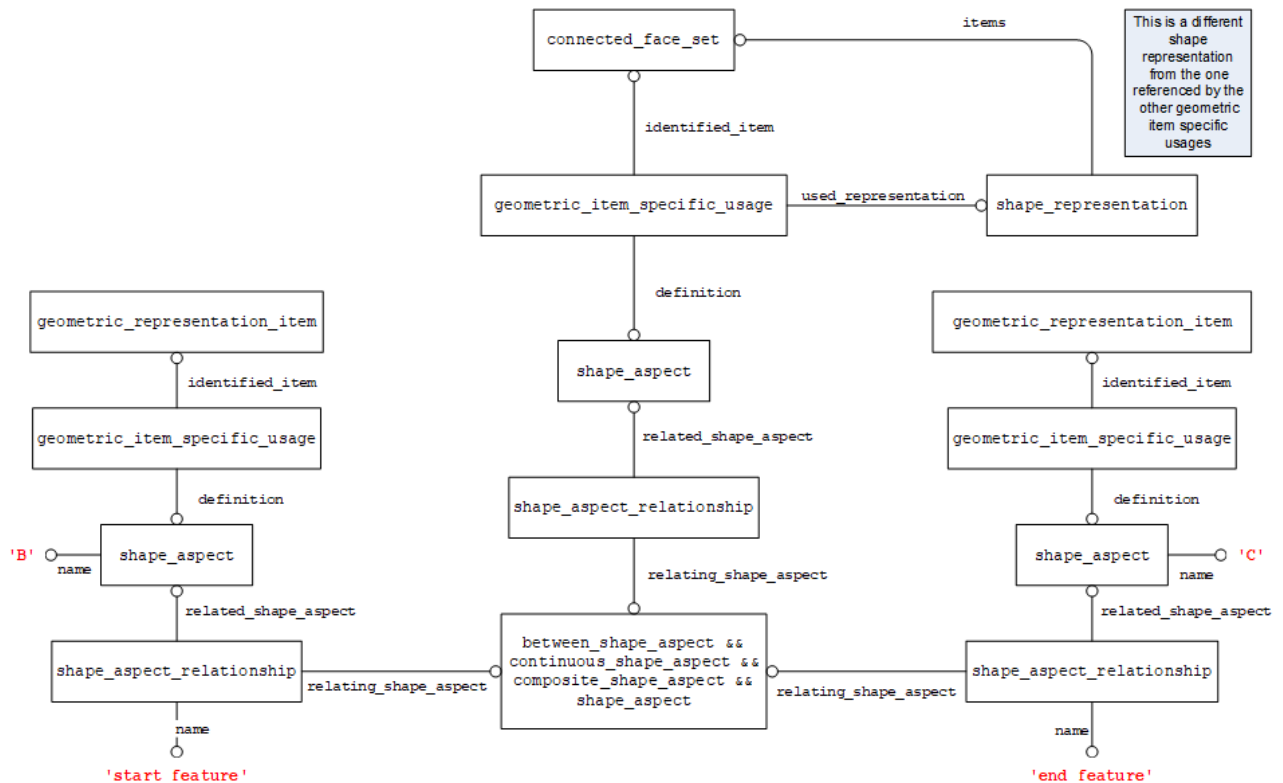


Figure 34: Tolerance with Between Modifier Instantiation

6.5 Definition of Datums

This section of the document deals with the implementation of Datums for geometric tolerancing in the STEP file. For a description of the meaning of Datums in the context of tolerancing see section 0.

In STEP, a datum_feature is a specialization of the shape_aspect entity. It needs to attach to the feature (or features) of the model which represents the datum. Note that the Datum Identifier is stored as an alphanumeric string in the datum.identification attribute.

6.5.1 Definition of Datums on a single feature

A feature is an indivisible model element that a datum applies to. Nonetheless, this datum can consist of several geometric elements. The best-known case for this is a cylinder that is made up of two half-cylinders, but it could just as well be the two opposing planar faces of a slot.

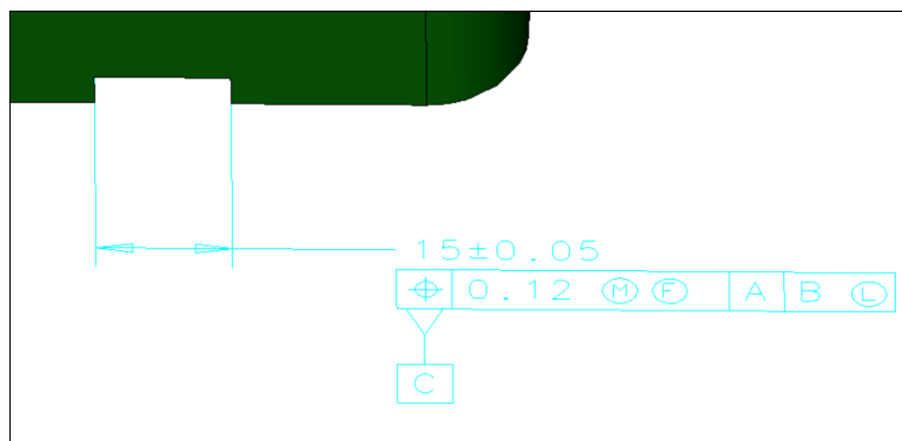


Figure 35: Datum referencing a feature made up of several geometric elements

In any case, all the geometric elements defining a single feature are gathered in a single `shape_aspect`. There is a slight difference in the instantiation depending on whether there is one or several geometric entities attached to the `shape_aspect`. Figure 36 below illustrates both variants in a single diagram.

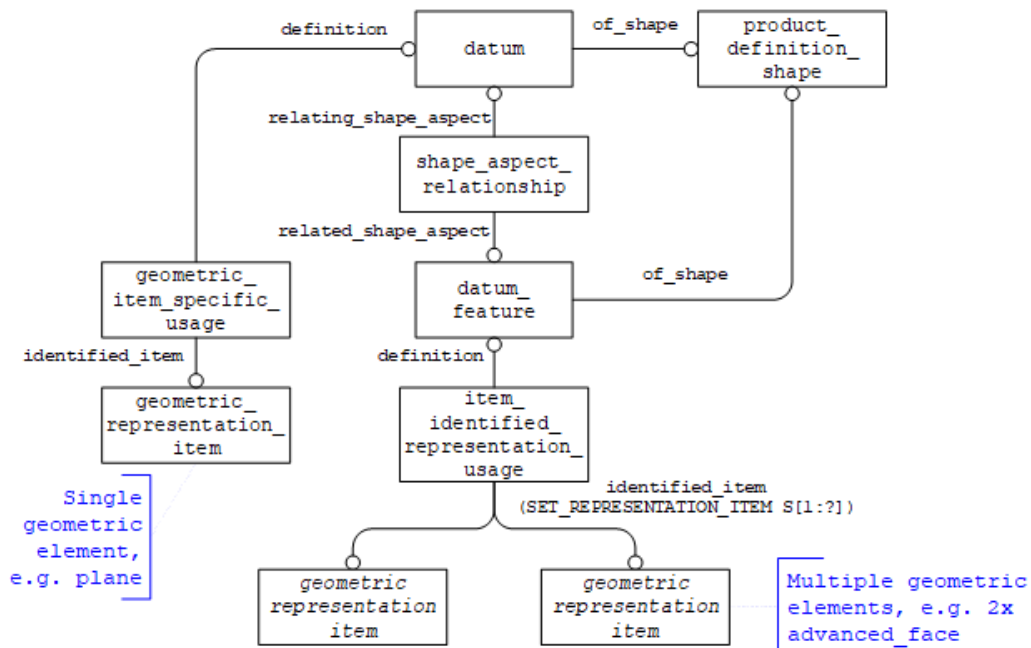


Figure 36: STEP entities for defining Datums

Part 21 Example

```
#265=DATUM('',$,#246,.F.,'B');
#269=DATUM_FEATURE('',$,#246,.T.);
#270=SHAPE_ASPECT_RELATIONSHIP('',$,#269,#265);
#273=GEOMETRIC_ITEM_SPECIFIC_USAGE('','datum plane',#265,#246,#275);
#275=PLANE('',$,#274);
#280=ITEM_IDENTIFIED_REPRESENTATION_USAGE('','datum feature',#269,#246,SET_REPRESENTATION_ITEM(#281,#282));
#281=ADVANCED_FACE('',( #283 ), #285, .T.);
#282=ADVANCED_FACE('',( #284 ), #286, .T.);
```

6.5.2 Definition of Datums on multiple features

Another case when a datum is represented by multiple features is illustrated below by a pattern of features forming a group. An example is illustrated in Figure 37 below.

An important distinction has to be made whether the datum applies to the group of features as a whole, or to each constituent individually. In STEP, this is determined by using either the “union” (for the first case) or the “group” (in the second case) subtype of `composite_shape_aspect`.

Note that by definition, a `datum_feature` is a `composite_unit_shape_aspect`.

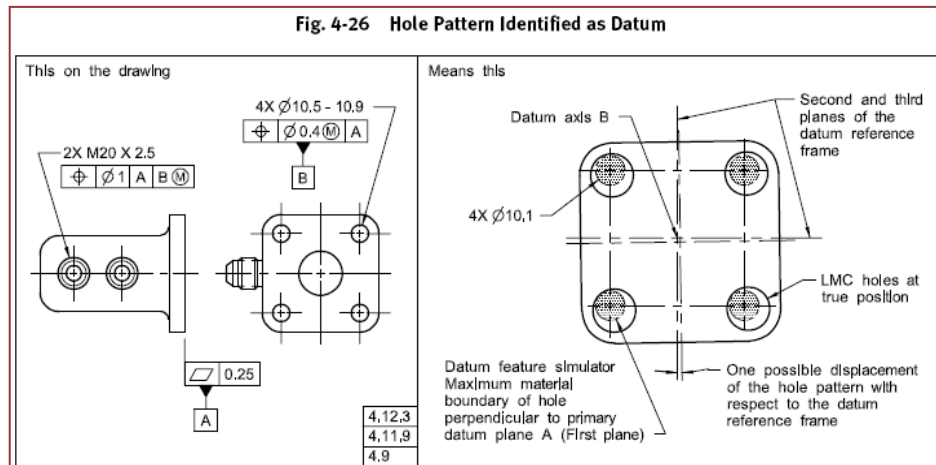


Figure 37: Hole pattern identified as Datum

To apply a datum as well as additional information to a pattern of features as a whole, a `datum_feature` is instantiated which is then referenced by `shape_aspect_relationships` linking it to the `shape_aspects` defining the constituent features. See 6.5.1 above for notes on their implementation.

Additional elements such as tolerances can reference the `datum_feature` as well; all this information then applies to the pattern of features as a whole.

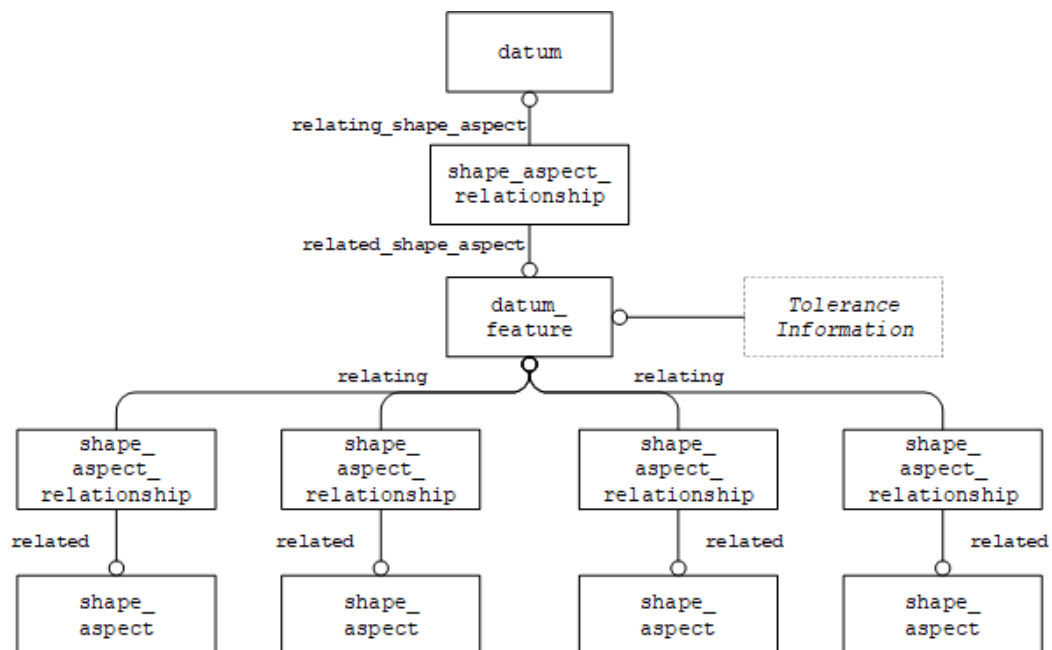


Figure 38: Datum and additional properties applying to group of features as a whole

The second case is where all the defined characteristics apply to each constituent feature of the pattern individually. This is conveyed by instantiating the `datum_feature` shown in Figure 38 above as a complex instance with `composite_group_shape_aspect`. The rest of the entity structure remains unchanged.

Note that in older versions of this document (older than 4.0.6), the `composite_group_shape_aspect` was instantiated separately and linked to the `datum_feature` by means of a `shape_aspect_relationship`, with the `datum_feature` as its `relating_shape_aspect`. Additional data such as tolerance information would link to the `composite_group_shape_aspect`. This approach is no longer recommended for export but must be supported on import for compatibility reasons.

6.5.3 Definition of a Datum combined with a Dimension

Whenever a datum is specified together with a dimension, the corresponding STEP entities can be combined to greatly simplify the entity structure required to represent the information.

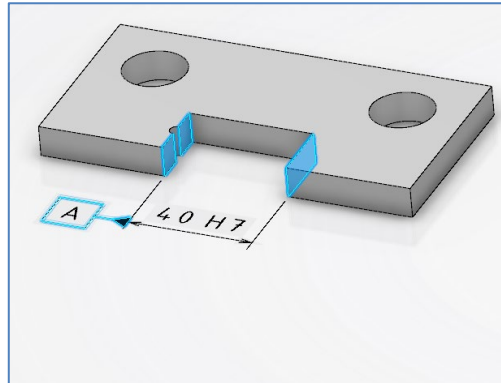


Figure 39: Example for a Datum and a Dimensional Location defined on a slot feature

To avoid creating redundant data structures in this case, the special entity type `dimensional_location_with_datum_feature` is available. As the name suggests, it is a common subtype of `dimensional_location` and `datum_feature`. Figure 40 illustrates the instantiation of the example shown above.

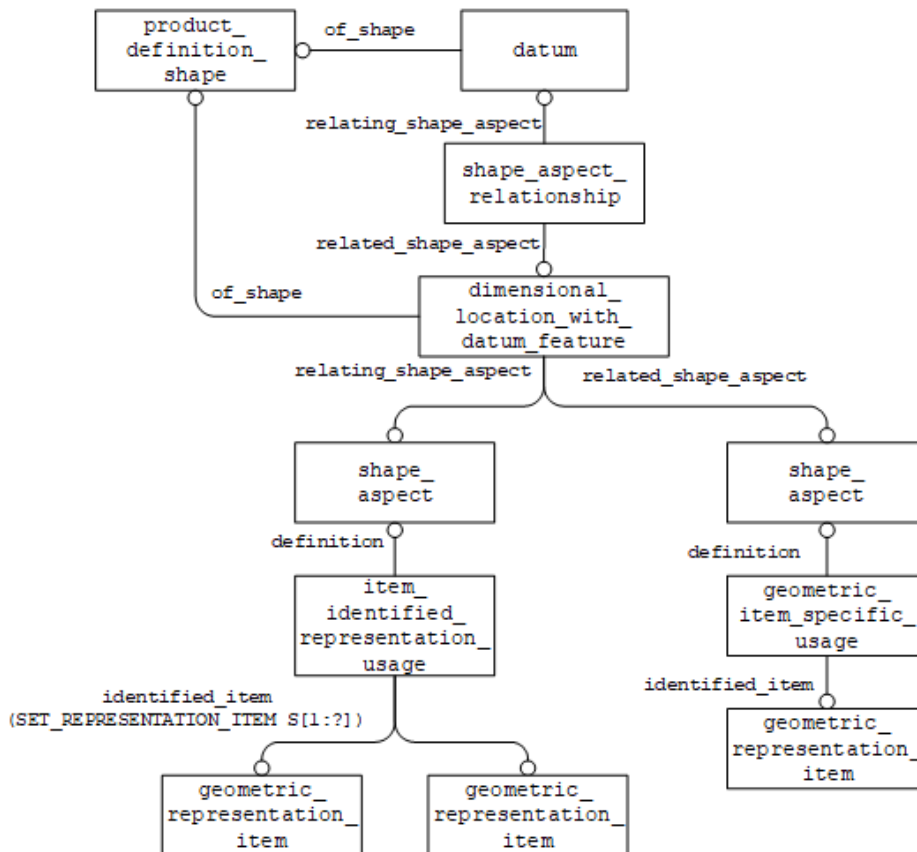


Figure 40: Instantiation of a Dimensional Location with Datum Feature

A similar solution is available for the case of a dimension on a cylindrical hole with a datum attached to it. The example shown in Figure 41 is taken from the NIST FTC-09 model (see section 1.3).

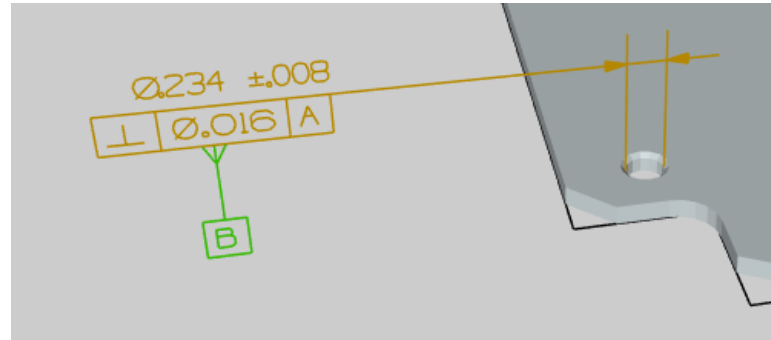


Figure 41: Example for a Datum and a Dimensional Size defined on a hole

The solution for this case uses the common subtype `dimensional_size_with_datum_feature` that works in the exact same way as its sister entity. Figure 42 illustrates the instantiation of the example taken from FTC-9:

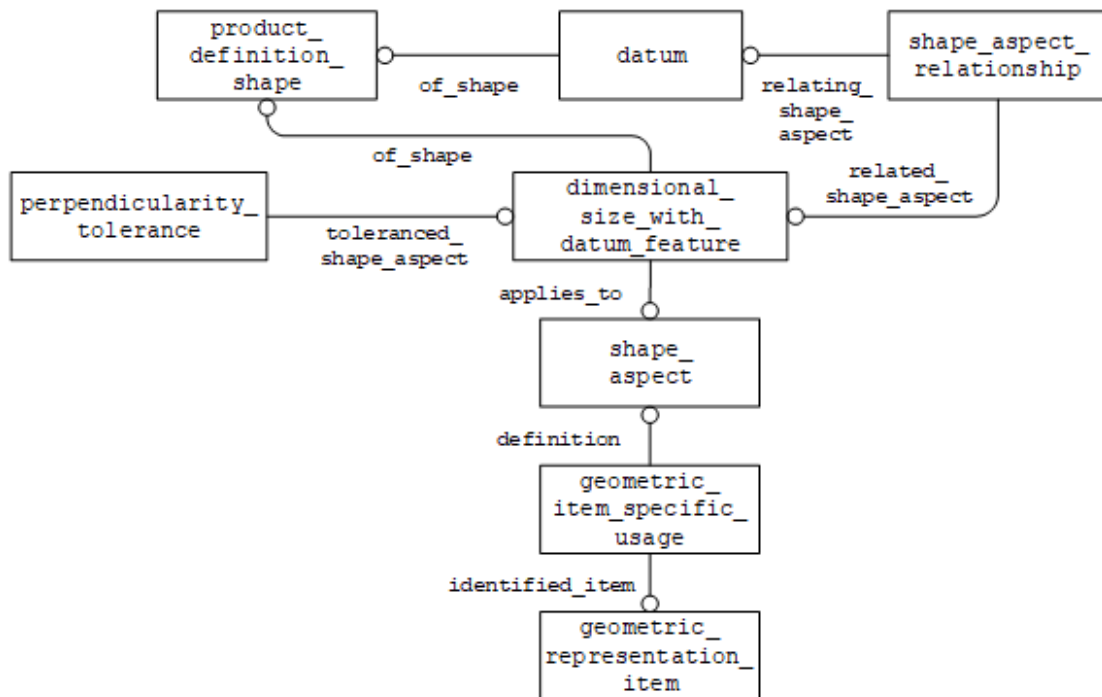


Figure 42: Instantiation of a Dimensional Size with Datum Feature

6.6 Implementing Datum Targets

A Datum Target is a point, line, curve, or limited area of the part surface that is used in the construction of a Datum, when it is not practical to use either an entire feature or a substantial region. A Datum is constructed from one or more Datum Targets and may be offset from the part surface. The implementation of Datum Targets is done by relating the `placed_datum_target_feature` or `datum_target` to the Datum of which it is part of the definition, by means of a `shape_aspect_relationship`.

Placed datum targets specify the geometry implicitly by means of an `axis2_placement_3d` and additional `length_measures` as applicable for the respective target type. This is defined in section 6.6.1

Placed datum targets can optionally also refer to geometric faces as defined in section 6.6.3 below.

6.6.1 Implicit Datum Target types

The geometric representation that forms the Datum Target is defined by the shape representation with parameters, as well as by the `placed_datum_target_feature.description` field. Each of these require specific `representation_items`, complete with predefined strings, in the `shape_representation_with_parameters` that convey the target geometry.

Note that it is possible to provide an additional explicit representation of the datum target as well, using an appropriate type of `geometric_representation_item` linked to the `placed_datum_target_feature` by means of a `geometric_item_specific_usage`.

Table 10 below defines all implicit datum target types with their relevant entities and values as required.

Target Type	Representation Entities
Circle	A placement entity (A2PL3D) with a name of “orientation” plus a complex instance of <code>measure_representation_item</code> and <code>length_measure_with_unit</code> entities with a name of “target diameter”. The origin of the A2PL3D defines the circle center and the Z axis of the placement denotes the normal of the surface, pointing away from the material. This implies the enclosed area, see Figure 43.
Circular Curve	A placement entity (A2PL3D) with a name of “orientation” plus a complex instance of <code>measure_representation_item</code> and <code>length_measure_with_unit</code> entities with a name of “target diameter”. The origin of the A2PL3D defines the circle center, with the circle being defined in the X-Y plane of the placement. In contrast to ‘circle’, the ‘circular curve’ defines only the outline of the circle. See Figure 43.
Line	A placement entity (A2PL3D) with a name of “orientation” plus a complex instance of <code>measure_representation_item</code> and <code>length_measure_with_unit</code> entities with a name of “target length” denoting the length along the “X” axis of the placement. The “Z” axis of the placement denotes the normal of the surface pointing away from the material, see Figure 43.
Point	A placement entity (A2PL3D) with a name of “orientation”. The “Z” axis of the placement denotes the normal of the surface pointing away from the material, see Figure 43.

Target Type	Representation Entities
Rectangle	A placement entity (A2PL3D) with a name of “orientation” plus two complex instances of <code>measure_representation_item</code> and <code>length_measure_with_unit</code> entities with names of “target length” and “target width”. The length is along the placement “X” axis and the width along the derived “Y” axis, with the placement itself positioned at the center of the rectangle. The “Z” axis of the placement denotes the normal of the surface pointing away from the material, see Figure 43. This implies the enclosed area.

Table 10: Instantiation of implicit DATUM TARGET types

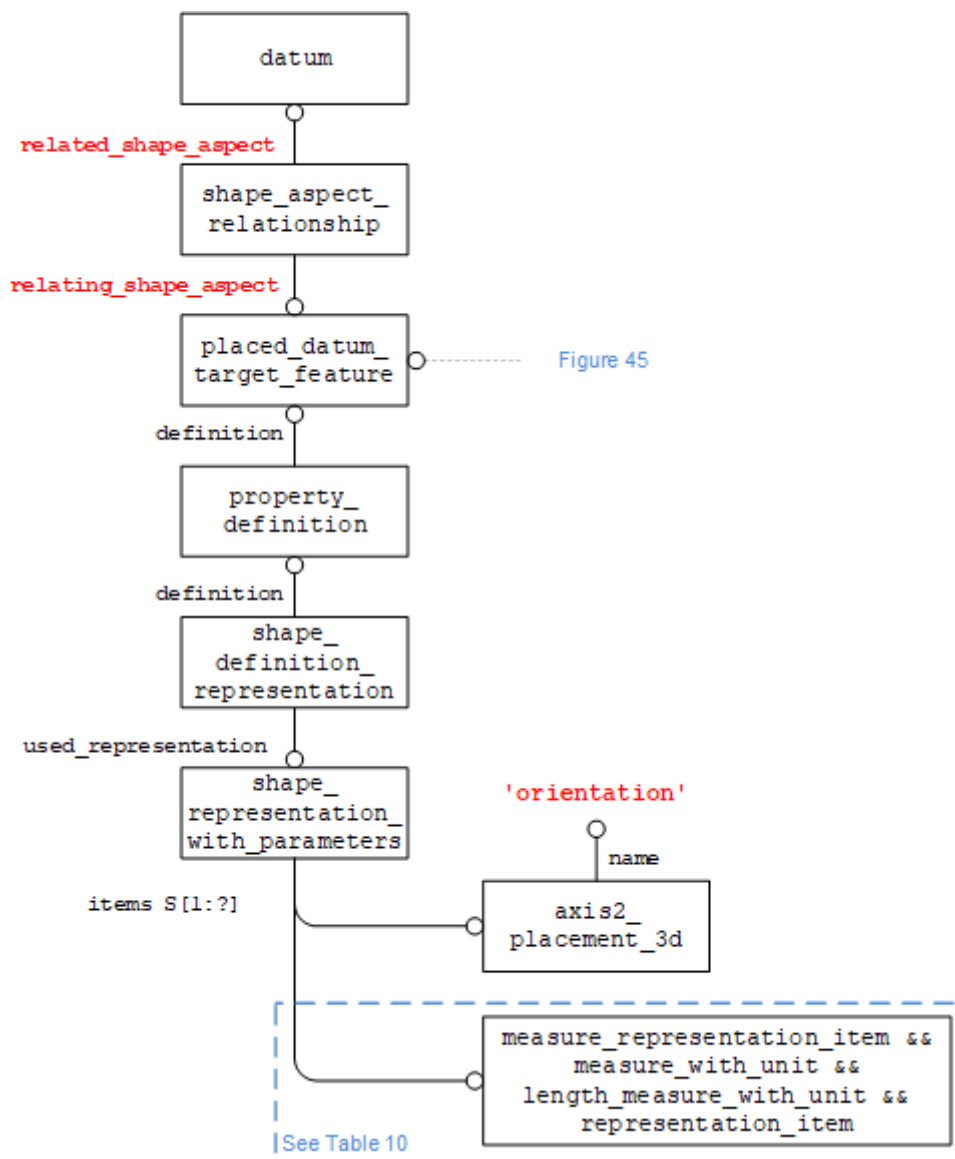


Figure 43: Datum Target Instantiation

The identification of the Datum Target is stored in the `placed_datum_target_feature.target_id` attribute.

Note: To avoid confusion and duplication, only the numeric portion of the identification is stored here, i.e., for Datum Target “A1”, the string “1” is stored. The letter portion of the Datum Target, i.e., “A”, is stored in the `datum.identification` attribute.

Note: Due to the rules defined for `placed_datum_target_feature`, using the function `get_shape_aspect_property_definition_representations` it is not possible to update the linkage between the `shape_aspect` and the `geometry` using `geometric_item_specific_usage`.

Note: The path from the `placed_datum_target_feature` entity to the `shape_representation_with_parameters` entity must be resolvable. This means there is a one-to-one relationship between these entities preventing any ambiguity when post-processing.

Note: The `context_of_items` attribute of the `shape_representation_with_parameters` entity must reference the same context as the `shape_representation` associated with the product definition.

Part 21 Example

```
#277=DATUM('', $, #252, .F., 'A');
#278=PLACED_DATUM_TARGET_FEATURE('', 'circle', #252, .T., '1');
#279=SHAPE_ASPECT_RELATIONSHIP('', 'datum target', #278, #277);
#280=PROPERTY_DEFINITION('', $, #278);
#281=CARTESIAN_POINT('', (1.0, 2.0, 0.5));
#282=DIRECTION('', (1.0, 0.0, 0.0));
#283=DIRECTION('', (0.0, 0.0, 1.0));
#284=AXIS2_PLACEMENT_3D('', #281, #283, #282);
#285=(LENGTH_MEASURE_WITH_UNIT()MEASURE_REPRESENTATION_ITEM()
    REPRESENTATION_ITEM('target diameter')
    MEASURE_WITH_UNIT(LENGTH_MEASURE(0.75), #6));
#286=SHAPE_REPRESENTATION_WITH_PARAMETERS('', (#284, #285), #246);
#287=SHAPE_DEFINITION_REPRESENTATION(#280, #286);
```

6.6.2 Explicit Datum Target types

Datum Targets of type ‘area’ and ‘curve’ are not placed features and require explicit geometry. The corresponding instantiation is shown in Figure 44 below.

Table 11 provides an overview on all explicit Datum Target types and their respective instantiation.

Target Type	Representation Entities
Area	See Figure 44. The <code>geometric_representation_item</code> needs to define an area, by means of an <code>advanced_face</code> .
Curve	See Figure 44; with the obvious differences that <code>datum_target.description</code> has to be ‘curve’, and the <code>geometric_representation_item</code> has to be a type of curve.

Table 11: Instantiation of explicit DATUM TARGET types

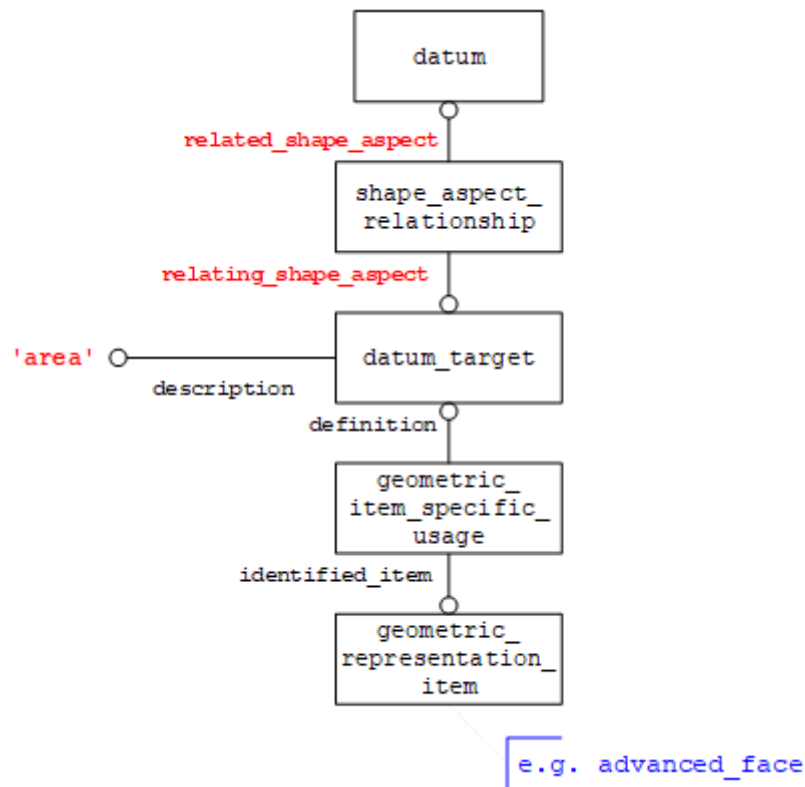


Figure 44: Area Datum Target

6.6.3 Relating Datum Target to Feature

To relate a placed datum target to a feature, the structure illustrated in Figure 45 should be used. Note there should be at most one `feature_for_datum_target_relationship` entity referencing a `placed_datum_target_feature` entity.

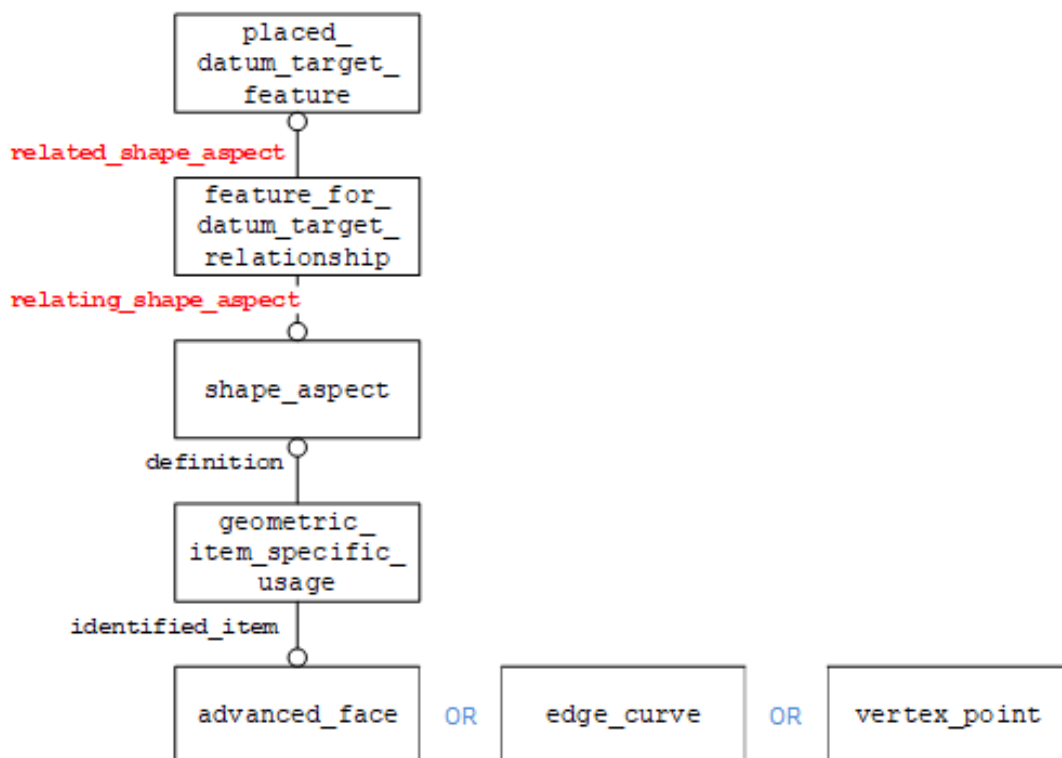


Figure 45: Relating Datum Target to Feature

6.6.4 Movable Datum Target

An example of a movable datum target is illustrated below:

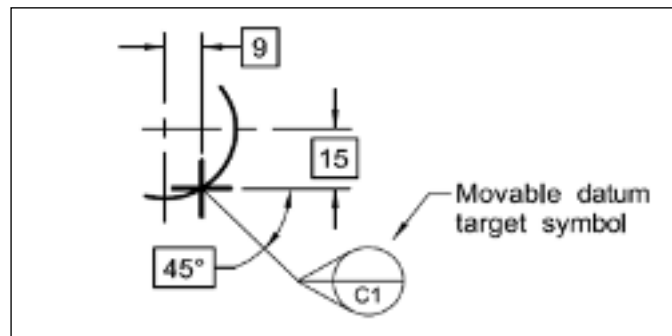


Figure 46: Example Movable Datum Target

A `direction` entity is used with a string value of “movable direction” for the `direction.name` attribute to indicate the datum target is movable. This `direction` entity would be included in the set of `items` in the `shape_representation_with_parameters` entity.

6.7 Feature Control Frames

This section defines the instantiation requirements for the Feature Control Frames which define the Geometric Tolerance. A Feature Control Frame takes the form shown in Figure 47 below, in order to define the type and value of the tolerance that has been applied to the feature.

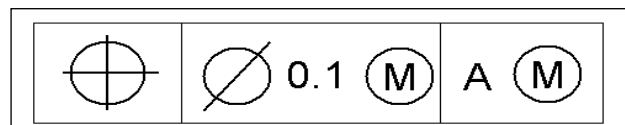


Figure 47: Feature Control Frame

Reading from left to right, Figure 47 shows:

- In the first box, the type of the tolerance, in this case, a position tolerance. See Table 12 for the full list of tolerance types supported.
- The second box defines the tolerance value itself (0.1) along with any tolerance modifiers.
- The third and subsequent boxes specify datum references along with any datum modifiers.

6.8 Supported Tolerance Types

The following table shows the Geometric Tolerance types supported by STEP. The table lists the tolerance name, the STEP entity, which is used to represent it, and additionally any restrictions on the number of datum references that apply in the STEP schema to that tolerance type.

Tolerance type	STEP Entity	Datums
Angularity	angularity_tolerance	1, 2 or 3
Circular Runout	circular_runout_tolerance	1, 2 or 3
Circularity / Roundness	roundness_tolerance	None
Coaxiality	coaxiality_tolerance	1, 2 or 3

Tolerance type	STEP Entity	Datums
Concentricity	concentricity_tolerance	1, 2 or 3
Cylindricity	cylindricity_tolerance	None
Flatness	flatness_tolerance	None
Parallelism	parallelism_tolerance	1, 2 or 3
Perpendicularity	perpendicularity_tolerance	1, 2 or 3
Position	position_tolerance	None, 1, 2 or 3
Profile of a Line	line_profile_tolerance	None, 1, 2 or 3
Profile of a Surface	surface_profile_tolerance	None, 1, 2 or 3
Straightness	straightness_tolerance	None
Symmetry	symmetry_tolerance	1, 2 or 3
Total Runout	total_runout_tolerance	1, 2 or 3

Table 12: Supported Tolerance Types

6.9 Feature Control Frames

The STEP file implementation of the Geometric Tolerances makes use of the entities shown in the sections below, each section showing the entities required for the different cases, i.e., tolerance without modifiers or datums, tolerance with datums and modified tolerances. Note that the linkage to the Feature(s) being toleranced is covered in Figure 31 and Figure 36.

Note: All `geometric_tolerance` entities have an optional attribute named `description` to be used for text associated with the tolerance otherwise not covered by a semantic value or modifier.

Note that the way the value provided by `geometric_tolerance.magnitude` is displayed can be qualified by extending the `length_measure_with_unit` to a complex entity with `qualified_representation_item`. See section 5.4 for details. This applies to all types of `geometric_tolerance` described in this section.

This section covers the following types of feature control frames:

- 6.9.1: Geometric Tolerance without Modifiers or Datums
- 6.9.2: Tolerance Zone (including affected plane, projected, and non-uniform tolerance zones)
- 6.9.3: Geometric Tolerance with Modifiers
- 6.9.4: Unequally Disposed Geometric Tolerance
- 6.9.5: Geometric Tolerance with Maximum Value
- 6.9.6: Unit-Basis Geometric Tolerance
- 6.9.7: Geometric Tolerance with Datums
- 6.9.8: Common Datums (ISO) or Multiple Datum Features (ASME)

0:

- Composite Geometric Tolerances

6.9.1 Geometric Tolerance without Modifiers or Datums

This case can only occur for the following Tolerance types:

- Circularity (Roundness)
- Cylindricity
- Flatness
- Position
- Profile of a Line
- Profile of a Surface
- Straightness

For this example, we will show a Position Tolerance. The `length_measure_with_unit` entity is used to convey the Tolerance Value:

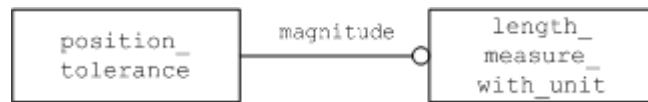


Figure 48: Tolerance without Modification or Datums

Part 21 Example

```
#274=LENGTH_MEASURE_WITH_UNIT(LENGTH_MEASURE(0.1),#4);  
#277=POSITION_TOLERANCE('',$,#274,#264);
```

6.9.2 Tolerance Zone

The entities `tolerance_zone` and `tolerance_zone_form` must be used to convey additional information about the tolerance value. Figure 49 illustrates how these entities are used in relationship with a geometric tolerance entity, i.e., `position_tolerance`.

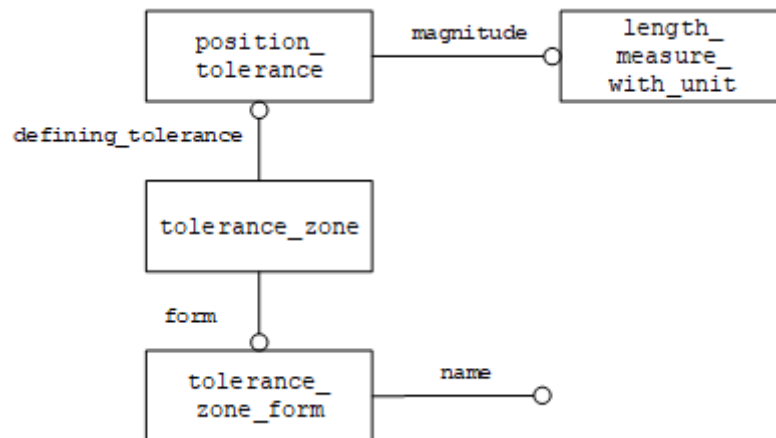


Figure 49: Tolerance Zone

Examples of the types of tolerances with special symbols are illustrated below:



Figure 50: Example Tolerance Zones

The valid values for the `name` attribute are listed in Table 13. They are defined in ISO 1101:2017 and ASME Y14.5-2018 respectively. There are many types of tolerance zones, but only some have a special symbol associated with them. Other string values may be used for the `name` attribute to convey additional information if required or the string may be empty. Examples of other tolerance zones are illustrated below in Figure 51.

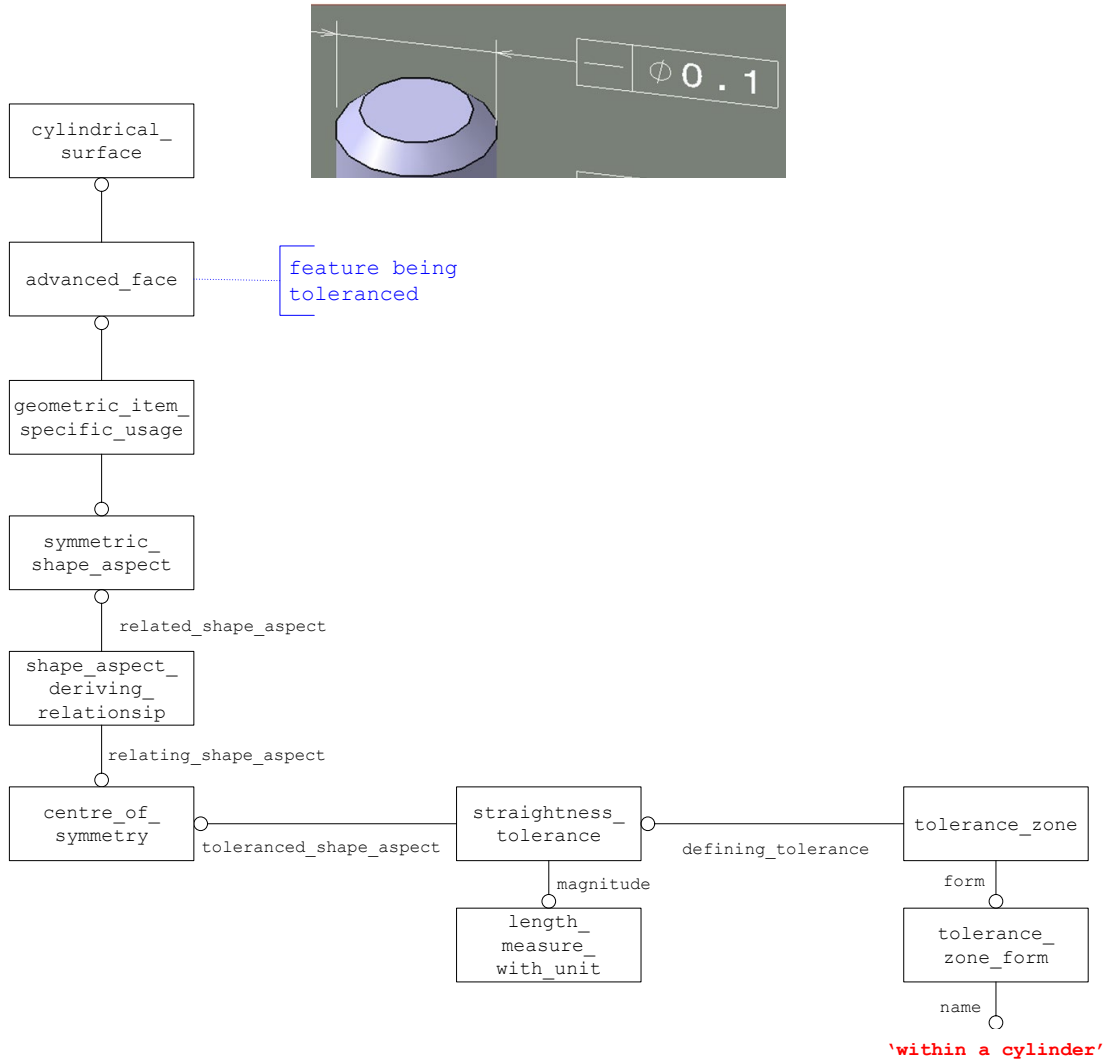
Any of the names imply that it is 'the space between/within ...', i.e., 'the space within a cone'. The only exception is the 'spherical' value, which is why 'within a sphere' is included as well. The space between/within also includes the bounding entity.

Note: Unless otherwise specified, the attribute `tolerance_zone_form.name` should have a value of 'unknown' when not defined by geometry or known by the user.

Tolerance_zone_form.name	Associated Symbol
'within a circle'	Diameter [∅]
'within a cylinder'	Diameter [∅]
'cylindrical or circular'	Diameter [∅]
'spherical'	Spherical Diameter [s∅]
'within a sphere' *	
'between two concentric circles'	
'between two equidistant curves'	
'between two coaxial cylinders'	
'between two equidistant surfaces'	
'non uniform'	
'between two parallel circles on a conical surface' *	
'between two parallel circles of the same diameter' *	
'between two equidistant complex lines or two parallel straight lines' *	
'between two non-equidistant complex lines or two non-parallel straight lines' *	
'within a cone' *	
'within a single complex surface' *	
'between two equidistant complex surfaces or two parallel planes' *	
'between two non-equidistant complex surfaces or two non-parallel planes' *	
'unknown'	

Table 13: Tolerance Zones

Note: Values indicated by a * have been added with AP242 Edition 2. Since `tolerance_zone_form.name` is a string value, these entries can be used with AP242 Edition 1 as well but will trigger a where rule violation.



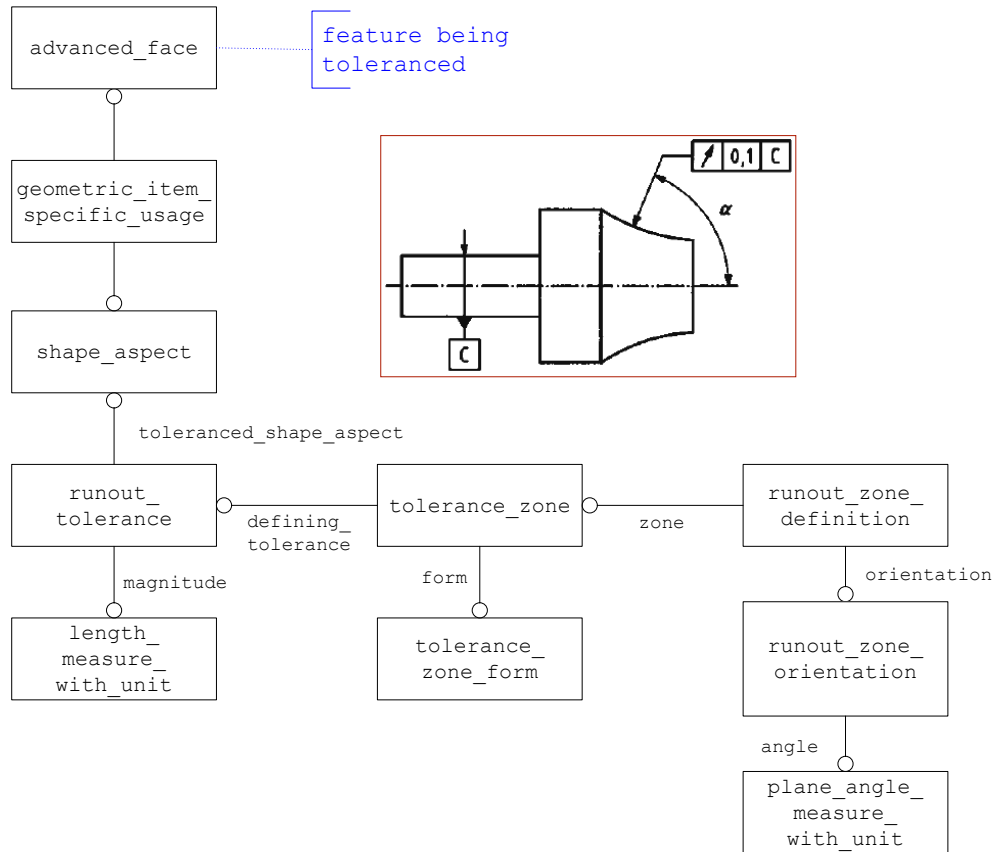


Figure 51: More Tolerance Zones

6.9.2.1 Affected Plane Tolerance Zone

Some tolerance zones are defined by orientation planes or intersection planes. An example of an intersection plane used to define a tolerance zone is illustrated below:

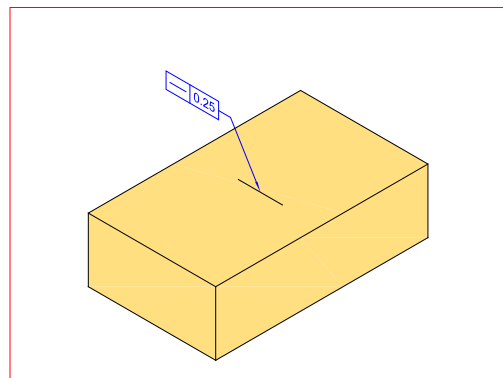


Figure 52: Example Affected Plane Tolerance Zone

The `shape_aspect_relationship` entity is used to convey this concept as illustrated in Figure 53. The `description` attribute value should contain the string value of “affected plane association”.

The affected plane is defined by the perpendicular intersection of the line element with the feature being tolerated.

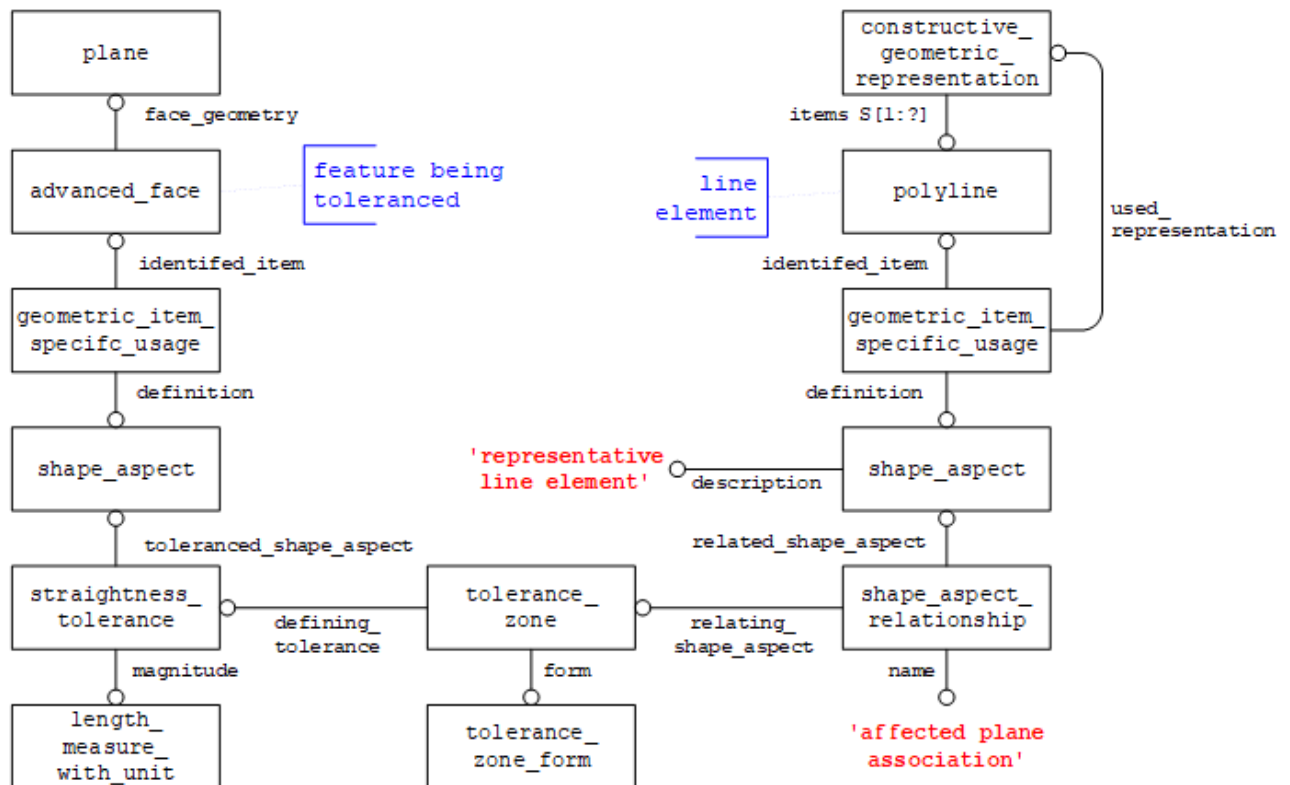


Figure 53: Intersection Plane Affected Tolerance Zone

Note that instead of a `polyline` used to represent the line element, an `axis2_placement_3d` entity may be used instead to represent the plane element. The x-y plane defined in the `axis2_placement_3d` entity is the actual intersection plane to use in this case and the `shape_aspect.description` attribute will have the string value of “representative plane element”.

Another example of affected plane association is illustrated in Figure 54 below. An orientation plane used to define a tolerance zone created by a tolerance referencing a dimension to indicate the affected plane. The affected plane in this case is defined by a plane parallel to the two dimension lines passing through the center of the feature being tolerated. As with the intersection plane, the x-y plane defined in the `axis2_placement_3d` entity is the actual affected plane to use.

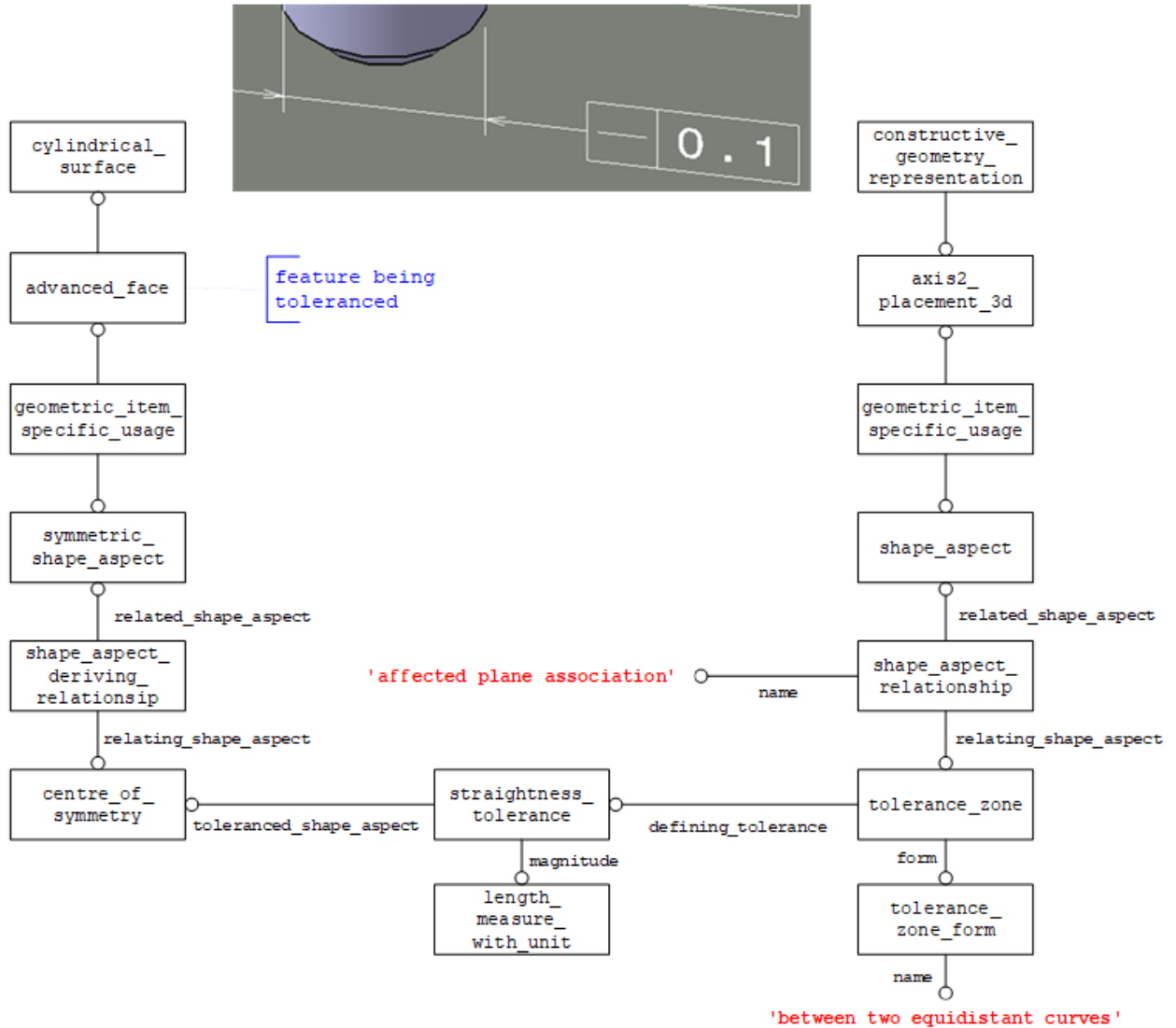


Figure 54: Orientation Plane Affected Tolerance Zone

6.9.2.2 Projected Tolerance Zone

An example of a projected tolerance in a feature control frame is illustrated below:

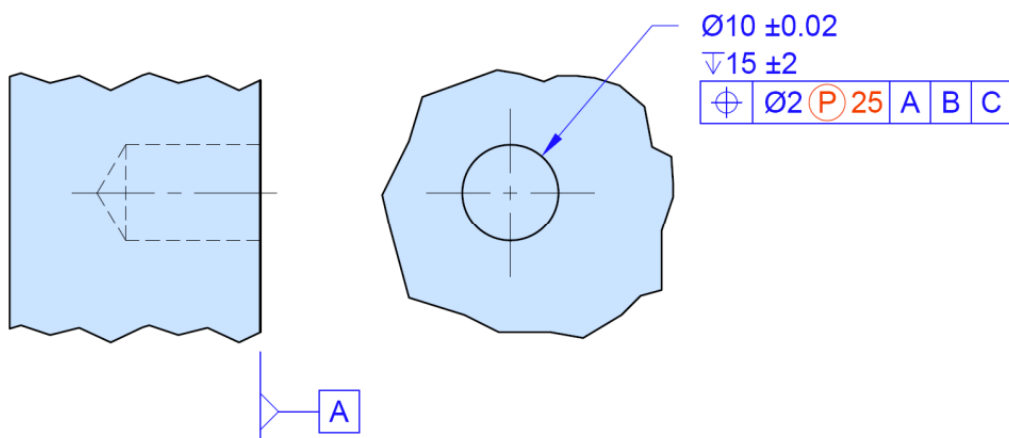


Figure 55: Example of a Positional Tolerance with Projected Tolerance Zone

A special symbol comprised of the letter P with a circle around it is used to convey projected tolerance. The entity `projected_zone_definition` along with the `tolerance_zone` entity described in section 6.9.2 are used to represent this concept as illustrated in Figure 56.

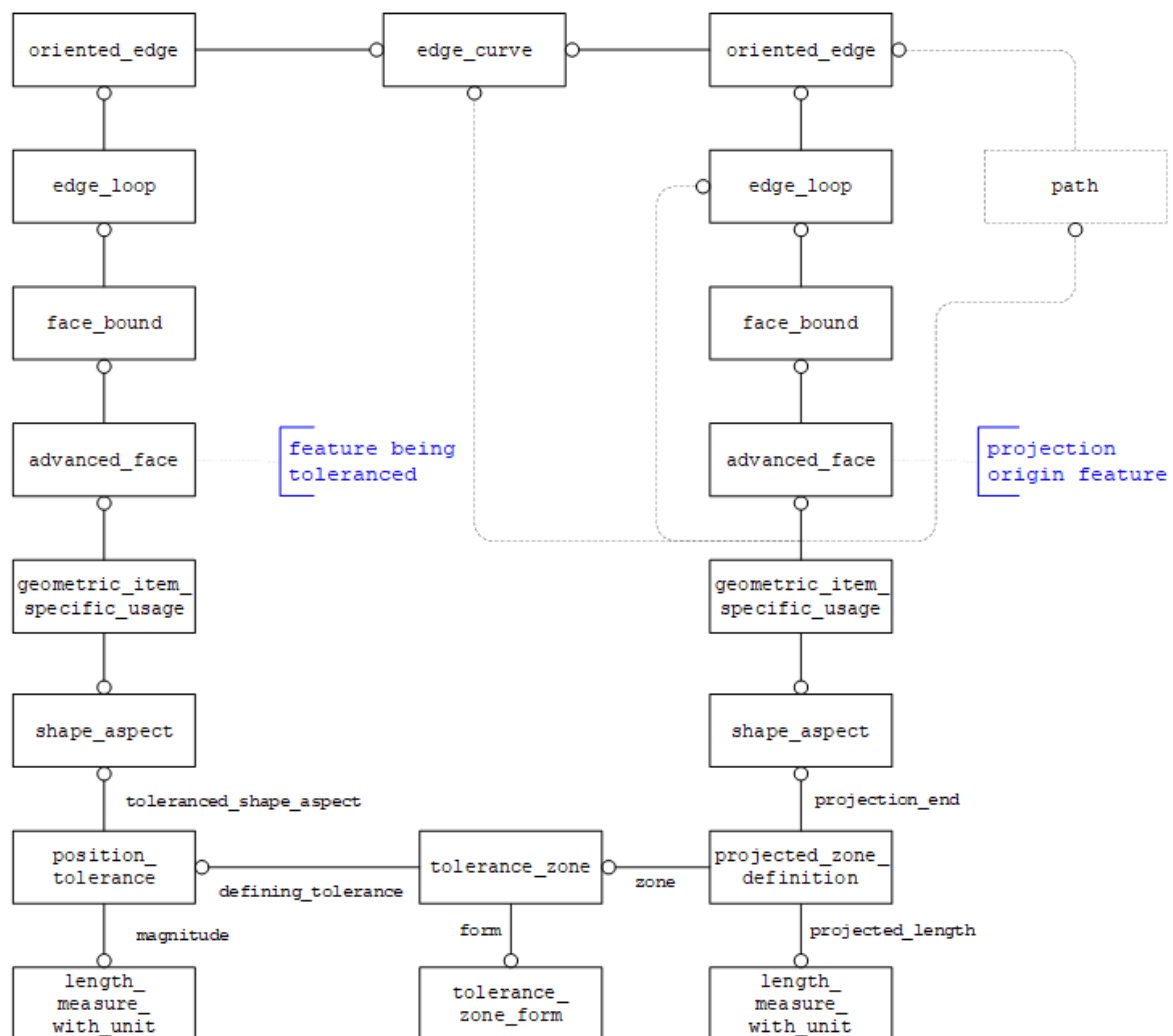


Figure 56: Projected Tolerance Zone

The `length_measure_with_unit` entity is used to capture the projected length via the `projected_length` attribute of the `projected_zone_definition` entity. The feature used as the origin of the projection is related to the geometric tolerance via the `projection_end` attribute of the `projected_zone_definition` entity.

As an example, a cylindrical hole through a planar surface with a projected tolerance as shown in Figure 55 above would be represented as follows: The feature being toleranced would be an `advanced_face` referencing a `cylindrical_surface` and the projection origin feature would be an `advanced_face` referencing the plane that intersects with the `cylindrical_surface`.

Notice the shared `edge_curve` entity between the feature being toleranced and the projection origin feature. This shared `edge_curve` entity is the boundary that defines the intersection between the feature being toleranced and the projection origin feature. Currently, the `boundaries` attribute of the `projected_zone_definition` entity is not used.

Note the relationship between the `shape_aspect` entity and associated topology, i.e., `advanced_face`, is one-to-one so there should not be any other such relationships defined in the context of this shape representation.

Part 21 Example

```
#74=(BOUNDED_SURFACE()B_SPLINE_SURFACE(2,1,((#53,#60),(#54,#61),
(#55,#62),(#56,#63),(#57,#64),(#58,#65),(#59,#66)),
.CYLINDRICAL_SURF.,.T.,.F.,.U.)B_SPLINE_SURFACE_WITH_KNOTS((3,2,
2,3),(2,2),(0.0,1.732050807568900,3.464101615137800,
5.196152422706600),(0.0,1.0),.UNSPECIFIED.)
GEOMETRIC_REPRESENTATION_ITEM()RATIONAL_B_SPLINE_SURFACE(((1.0,
1.0),(0.500000000000000,0.500000000000000),(1.0,1.0),
(0.500000000000000,0.500000000000000),(1.0,1.0),
(0.500000000000000,0.500000000000000),(1.0,1.0)))
REPRESENTATION_ITEM('F1')SURFACE());
#121=ADVANCED_FACE('F1',(#120),#74,.F.);
#891=QUASI_UNIFORM_SURFACE('F10',1,1,((#887,#889),(#888,#890)),
.PLANE_SURF.,.F.,.F.,.U.);
#931=ADVANCED_FACE('F10',(#913,#927,#930),#891,.T.);
#1244=SHAPE_ASPECT('FC5',$,#41,.T.);
#1247=GEOMETRIC_ITEM_SPECIFIC_USAGE('FC5',$,#1244,#42,#121);
#1639=SHAPE_ASPECT('FC5',$,#41,.T.);
#1642=GEOMETRIC_ITEM_SPECIFIC_USAGE('FC5',$,#1639,#42,#931);
#1752=(GEOMETRIC_TOLERANCE('FC5',$,#1747,#1244)
GEOMETRIC_TOLERANCE_WITH_DATUM_REFERENCE((#1751))
GEOMETRIC_TOLERANCE_WITH_MODIFIERS(.MAXIMUM_MATERIAL_REQUIREMENT.)
POSITION_TOLERANCE());
#1753=TOLERANCE_ZONE_FORM('cylindrical or circular');
#1754=TOLERANCE_ZONE('FC5',$,#41,.F.,(#1752),#1753);
#1755=LENGTH_MEASURE_WITH_UNIT(LENGTH_MEASURE(60.5),#28);
#1756=PROJECTED_ZONE_DEFINITION(#1754,(),#1639,#1755);
```

6.9.2.3 Non-Uniform Tolerance Zone

An example of a non-uniform tolerance zone is illustrated below:

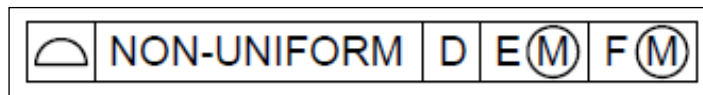


Figure 57: Example Non-Uniform Tolerance Zone

The step entity used to represent this concept is called `non_uniform_zone_definition` and it is used by referencing the `tolerance_zone` entity similar to how the `projected_zone_definition` entity references the `tolerance_zone` entity as illustrated above.

6.9.3 Geometric Tolerance with Modifiers

A modified geometric tolerance is mapped to STEP as a complex entity, containing the geometric tolerance entity and a `geometric_tolerance_with_modifiers` entity. The `modifiers` attribute of this entity defines the type of modification applied to the tolerance, and is an enumeration with the following allowable values:

Geometric Tolerance Modifier Value	Symbol	Notes
.CIRCLE_A.	Ⓐ	ISO 1101
.MAXIMUM_MATERIAL_REQUIREMENT.	Ⓜ	ISO 1692
.LEAST_MATERIAL_REQUIREMENT.	Ⓛ	ISO 1692
.RECIPROCITY_REQUIREMENT.	Ⓡ	ISO 1692
.ANY_CROSS_SECTION.	ACS	ISO 1101
.FREE_STATE.	ⓕ	ISO 10579
.COMMON_ZONE.	CZ	ISO 1101
.MINOR_DIAMETER.	LD	ISO 1101
.MAJOR_DIAMETER.	MD	ISO 1101
.PITCH_DIAMETER.	PD	ISO 1101
.LINE_ELEMENT.	LE	ISO 1101
.NOT_CONVEX.	NC	ISO 1101
.STATISTICAL_TOLERANCE.	<ST>	ASME Y14.5-2009
.TANGENT_PLANE.	Ⓣ	ASME Y14.5-2009 Note: ISO 1101 uses ASSOCIATED_MAXIMUM_-INSCRIBED_FEATURE
.EACH_RADIAL_ELEMENT.	EACH RADIAL ELEMENT	ASME Y14.5-2009
.SEPARATE_REQUIREMENT.	SEP REQ	ASME Y14.5-2009
.UNITED_FEATURE.	UF	ISO 1101
.ASSOCIATED_MINMAX_FEATURE.	Ⓒ	ISO 1101 (Chebyshev)
.ASSOCIATED_LEAST_SQUARE_FEATURE.	Ⓖ	ISO 1101 (Gaussian)
.ASSOCIATED_MINIMUM_-INSCRIBED_FEATURE.	Ⓝ	ISO 1101
.ASSOCIATED_TANGENT_FEATURE.	Ⓣ	ISO 1101 Note: ASME Y14.5-2009 uses TANGENT_PLANE
.ASSOCIATED_MAXIMUM_-INSCRIBED_FEATURE.	Ⓧ	ISO 1101
.REFERENCE_MINIMAX_FEATURE_-WITHOUT_CONSTRAINT.	C	ISO 1101 (Chebyshev)
.REFERENCE_MINIMAX_FEATURE_-WITH_EXTERNAL_MATERIAL_CONSTRAINT.	CE	ISO 1101 (Chebyshev)

Geometric Tolerance Modifier Value	Symbol	Notes
.REFERENCE_MINIMAX_FEATURE_- WITH_INTERNAL_MATERIAL_CONSTRAINT.	CI	ISO 1101 (Chebyshev)
.REFERENCE_LEAST_SQUARE_FEATURE_- WITHOUT_CONSTRAINT.	G	ISO 1101 (Gaussian)
.REFERENCE_LEAST_SQUARE_FEATURE_- WITH_EXTERNAL_MATERIAL_CONSTRAINT.	GE	ISO 1101 (Gaussian)
.REFERENCE_LEAST_SQUARE_FEATURE_- WITH_INTERNAL_MATERIAL_CONSTRAINT.	GI	ISO 1101 (Gaussian)
.REFERENCE_MINIMUM_CIRCUMSCRIBED_- FEATURE.	X	ISO 1101
.REFERENCE_MAXIMUM_INSCRIBED_- FEATURE.	N	ISO 1101
.TOTAL_RANGE_DEVIATION.	T	ISO 1101
.PEAK_HEIGHT.	P	ISO 1101
.VALLEY_DEPTH.	V	ISO 1101
.STANDARD_DEVIATION.	Q	ISO 1101

Table 14: Geometric Tolerance Modifier Values

In the following example, position tolerance is used for illustration purposes:

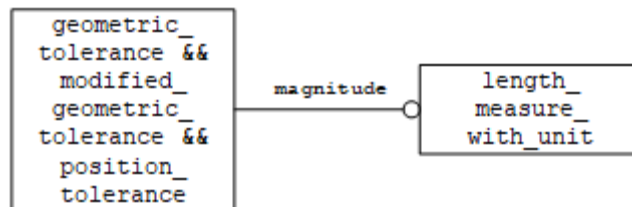


Figure 58: Geometric Tolerance with Modifiers

Part 21 Example

```
#274=LENGTH_MEASURE_WITH_UNIT(LENGTH_MEASURE(0.1), #4);
#277=(GEOMETRIC_TOLERANCE('',$, #274,#264)
GEOMETRIC_TOLERANCE_WITH_MODIFIERS((.MAXIMUM_MATERIAL_REQUIREMENT.
)) POSITION_TOLERANCE());
```

6.9.4 Unequally Disposed Geometric Tolerance

An example of this kind of tolerance is illustrated below:

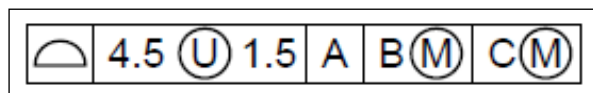


Figure 59: Example Unequally Disposed Tolerance

The symbol circle-U is used to define an unequally-disposed geometric tolerance. The step entity used to represent this concept is called `unequally_disposed_geometric_tolerance` which is a subtype of `geometric_tolerance` with an additional attribute called `displacement` to hold the additional value.

6.9.5 Geometric Tolerance with Maximum Value

An example of this kind of tolerance is illustrated below:

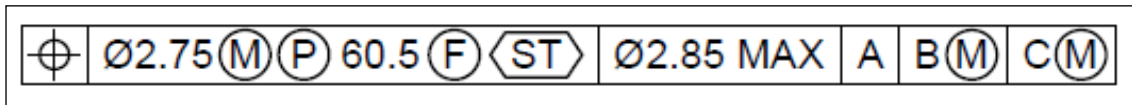


Figure 60: Example Tolerance with Maximum Value

The `geometric_tolerance_with_maximum_tolerance` entity is a subtype of `geometric_tolerance_with_modifiers` because there has to be a least one material condition specified as a modifier before specifying a maximum value. The additional attribute to hold this maximum value is called `maximum_upper_tolerance`.

6.9.6 Unit-Basis Geometric Tolerance

An example of this kind of tolerance is illustrated below:

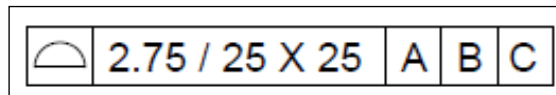


Figure 61: Example Unit-Basis Tolerance

There are two forms of a unit-basis geometric tolerance, one is based on a length unit and the other is based on an area unit, as shown in the example above. The step entities used to represent these two forms are `geometric_tolerance_with_defined_unit` and `geometric_tolerance_with_defined_area_unit` respectively. The `geometric_tolerance_with_defined_unit` entity has a single attribute called `unit_size` to hold the value. The `geometric_tolerance_with_defined_area_unit` entity is a subtype of `geometric_tolerance_with_defined_unit` with additional attributes named `area_type` and `second_unit_size`. The `area_type` attribute is an enumeration with the following valid values:

- .CIRCULAR.
- .RECTANGULAR.
- .SQUARE.

6.9.7 Geometric Tolerance with Datums

Most Geometric Tolerances require one or more Datums in order to specify from where the tolerance is measured. A feature control frame with this condition is shown in Figure 62.

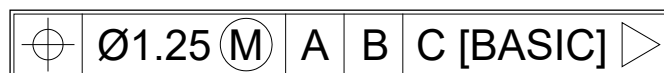


Figure 62: Example Geometric Tolerance with Datums

In the STEP file, this is represented by a complex entity of `geometric_tolerance` and `geometric_tolerance_with_datum_reference`, as shown in Figure 63.

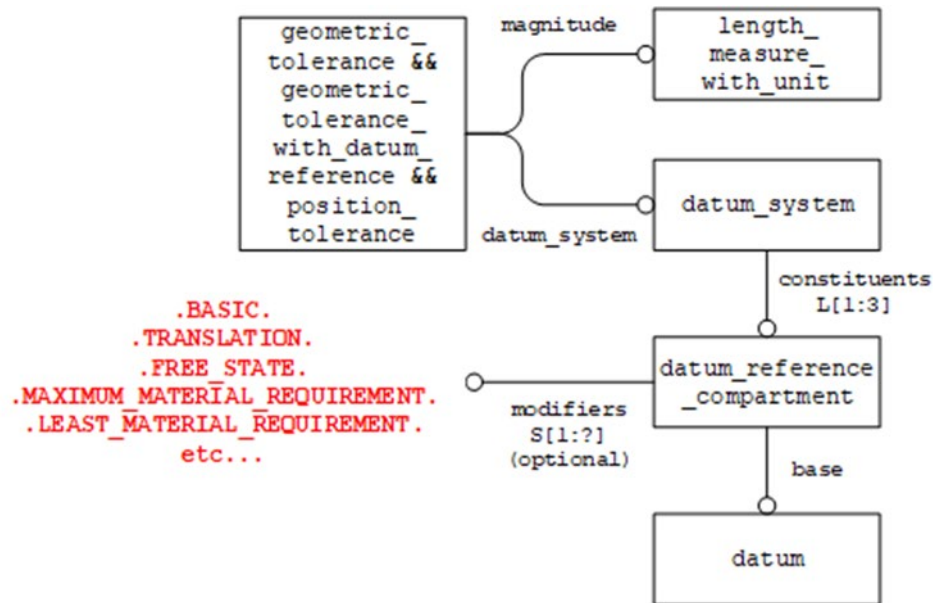


Figure 63: Tolerance with Datum Reference

In the Feature Control Frame, the datums, if present, appear in a specific order, i.e., primary, secondary, and tertiary. The STEP implementation of this uses the `constituents` attribute of the `datum_system` entity as an ordered LIST. The precedence of the Datum in the tolerance is therefore given by the order of the `datum_reference_compartment` entities referenced by the `datum_system` entity.

Notes on the uniqueness of Datum Systems:

- Each `datum_system` (for example A|B|C) must be unique. If there are several tolerances using A|B|C, they shall reference the same instance of `datum_system`.
- A|B|C is not the same as A|C|B. The order of datums is relevant.
- A|B|C is not the same as A|BⓂ|C. The addition of `general_datum_reference.modifiers` cause a new instance of `general_datum_reference` to be populated. That will cause a different `datum_system` instance to be populated.
- Every instance of `datum_reference_compartment` can be used only once. If there are two `datum_systems` A|B|C and A|D|E, there need to be two instances of `datum_reference_compartment` for datum A.

If a degree of freedom constraint modifier is used, the datum reference frame axis system is defined as illustrated below:

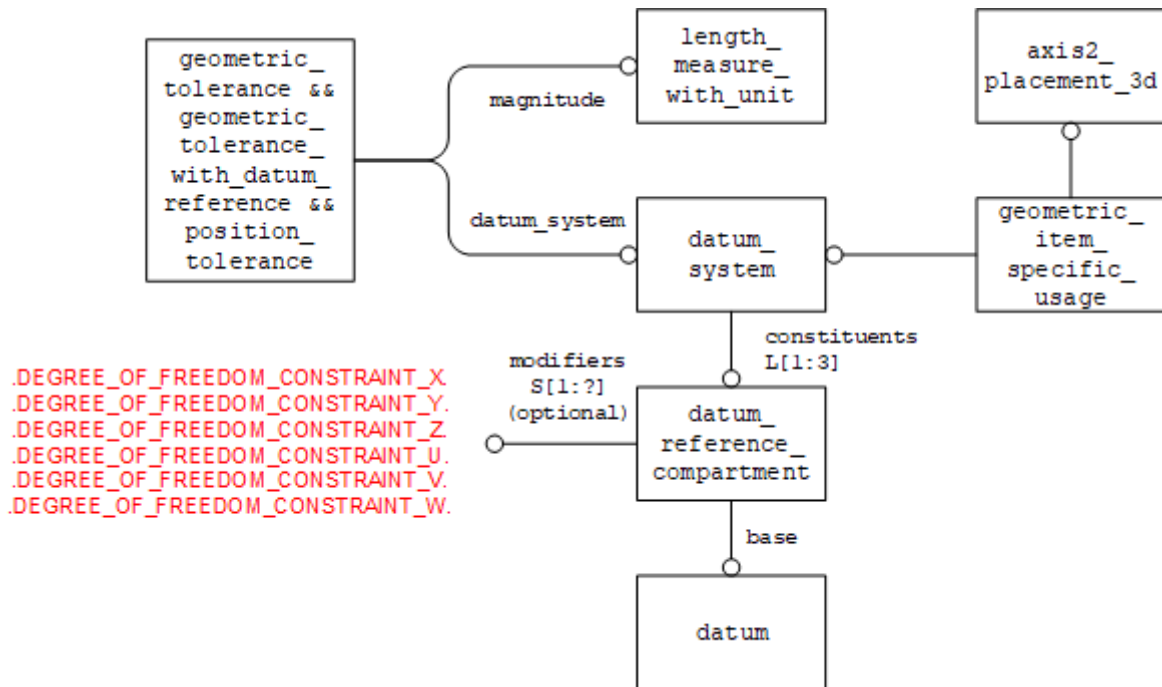


Figure 64: Tolerance with Datum Reference and Axis System

Note that if the datum reference is modified, as shown in Figure 47, then the optional `modifiers` attribute of the `datum_reference_compartment` entity will be populated with a list of appropriate modifiers. The allowable enumerated values for the `modifiers` attribute are listed below:

Datum Reference Modifier Value	Symbol	Notes
.FREE_STATE.	ⓕ	ISO 10579
.BASIC.	BSC or BASIC	ASME Y14.5-2009
.TRANSLATION.	▷	ASME Y14.5-2009
.LEAST_MATERIAL_REQUIREMENT.	Ⓛ	ISO 2692
.MAXIMUM_MATERIAL_REQUIREMENT.	Ⓜ	ISO 2692
.POINT.	[PT]	ISO 5459. See Figure 66 below.
.LINE.	[SL]	ISO 5459. See Figure 66 below.
.PLANE.	[PL]	ISO 5459. See Figure 66 below.
.ORIENTATION.	><	ISO 5459
.ANY_CROSS_SECTION.	[ACS]	ISO 5459
.ANY_LONGITUDINAL_SECTION.	[ALS]	ISO 5459

Datum Reference Modifier Value	Symbol	Notes
.CONTACTING_FEATURE.	[CF]	ISO 5459
.DISTANCE_VARIABLE.	[DV]	ISO 5459
.DEGREE_OF_FREEDOM_CONSTRAINT_X.	[x]	ASME Y14.5-2009
.DEGREE_OF_FREEDOM_CONSTRAINT_Y.	[y]	ASME Y14.5-2009
.DEGREE_OF_FREEDOM_CONSTRAINT_Z.	[z]	ASME Y14.5-2009
.DEGREE_OF_FREEDOM_CONSTRAINT_U.	[u]	ASME Y14.5-2009
.DEGREE_OF_FREEDOM_CONSTRAINT_V.	[v]	ASME Y14.5-2009
.DEGREE_OF_FREEDOM_CONSTRAINT_W.	[w]	ASME Y14.5-2009
.MINOR_DIAMETER.	[LD]	ISO 5459
.MAJOR_DIAMETER.	[MD]	ISO 5459
.PITCH_DIAMETER.	[PD]	ISO 5459

Table 15: Simple Datum Reference Modifier Values

Part 21 Example

```
#1635=DATUM('D1', $, #41, .F., 'A');
#1672=DATUM_REFERENCE_COMPARTMENT('', $, #41, .F., #1635, $);
#1673=DATUM('D2', $, #41, .F., 'B');
#1709=DATUM_REFERENCE_COMPARTMENT('', $, #41, .F., #1673, $);
#1710=DATUM('D3', $, #41, .F., 'C');
#1746=DATUM_REFERENCE_COMPARTMENT('', $, #41, .F., #1710,
    (SIMPLE_DATUM_REFERENCE_MODIFIER(.BASIC.),
    SIMPLE_DATUM_REFERENCE_MODIFIER(.TRANSLATION)));
#1747=LENGTH_MEASURE_WITH_UNIT(LENGTH_MEASURE(1.25), #28);
#1751=DATUM_SYSTEM('DS1', $, #41, .F., (#1672, #1709, #1746));
#1752=(GEOMETRIC_TOLERANCE('FC5', $, #1747, #1244)
    GEOMETRIC_TOLERANCE_WITH_DATUM_REFERENCE((#1751))
    GEOMETRIC_TOLERANCE_WITH_MODIFIERS(.MAXIMUM_MATERIAL_REQUIREMENT.)
    POSITION_TOLERANCE());
```

Note that it is possible to have both datum references with and/or without modifiers.

Note the modifiers attribute is a select type so the concept illustrated below can be represented:

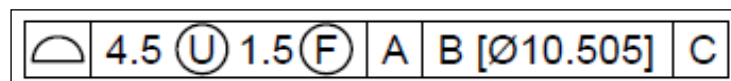


Figure 65: Example Datum Reference Modifier with Value

In this case the datum_reference_modifier_with_value entity is used in the datum_reference_compartment entity instead of the simple_datum_reference_modifier type to define this value modifying the datum reference.

When a datum is established, for example, on a complex surface, the datum consists of a plane, a straight line, or a point, or a combination thereof. The modifier [PL], [SL] or [PT], or a combination thereof, can be attached to the datum letter to limit the situation feature(s) considered relative to the surface.

In STEP, this is represented by using the `simple_datum_reference_modifier` value(s) `.PLANE.`, `.LINE.` or `.POINT.` respectively, and associating the geometry for the situation feature as illustrated in Figure 66 below.

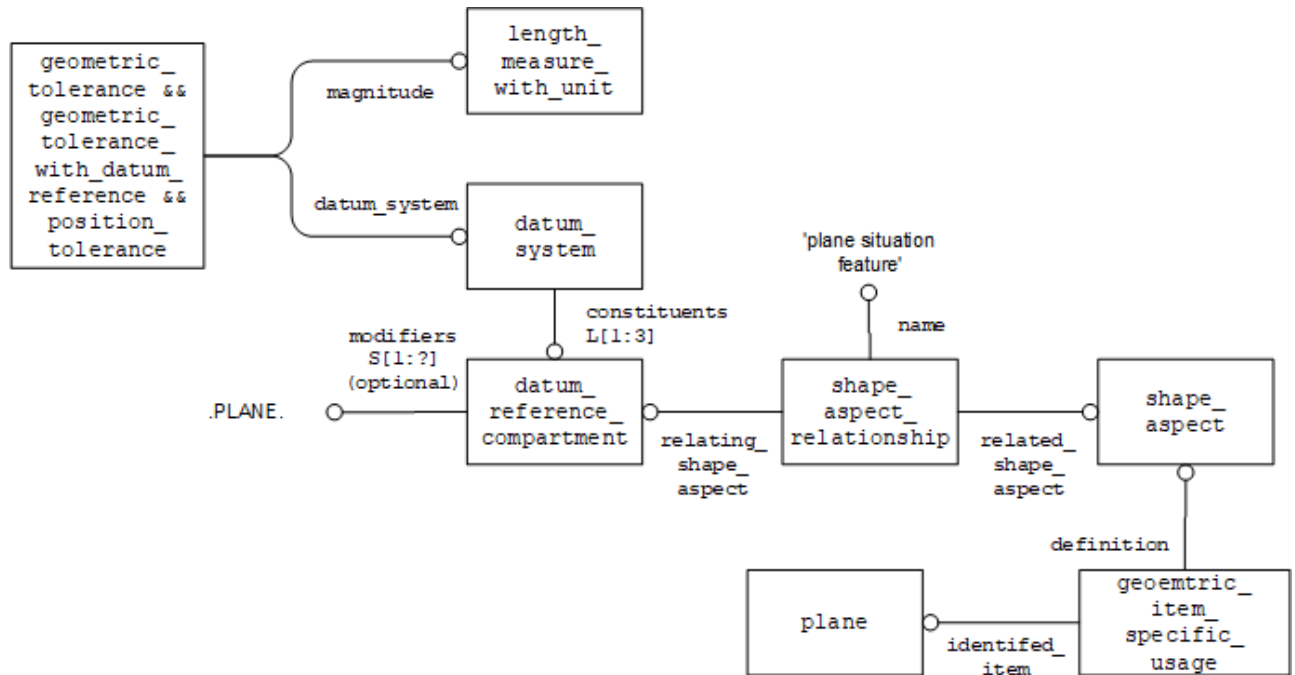


Figure 66: Example for [PL] datum modifier with associated situation feature

6.9.8 Common Datums (ISO) or Multiple Datum Features (ASME)

It is possible for two or more Datums (ISO) or Datum Features (ASME) referenced in the same compartment to have equal importance when specifying the Datum References. A feature control frame with this condition is shown in Figure 67.

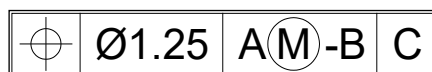


Figure 67: Common/Multiple Datum

In the STEP file, this is implemented using the `datum_reference_element` entity for each datum, The `datum_reference_compartment` entity is used to collect the “equal weight” datum references together using the `common_datum_list` type within the `base` attribute, which is an ordered list with at least two elements. An instantiation of this is shown in Figure 68.

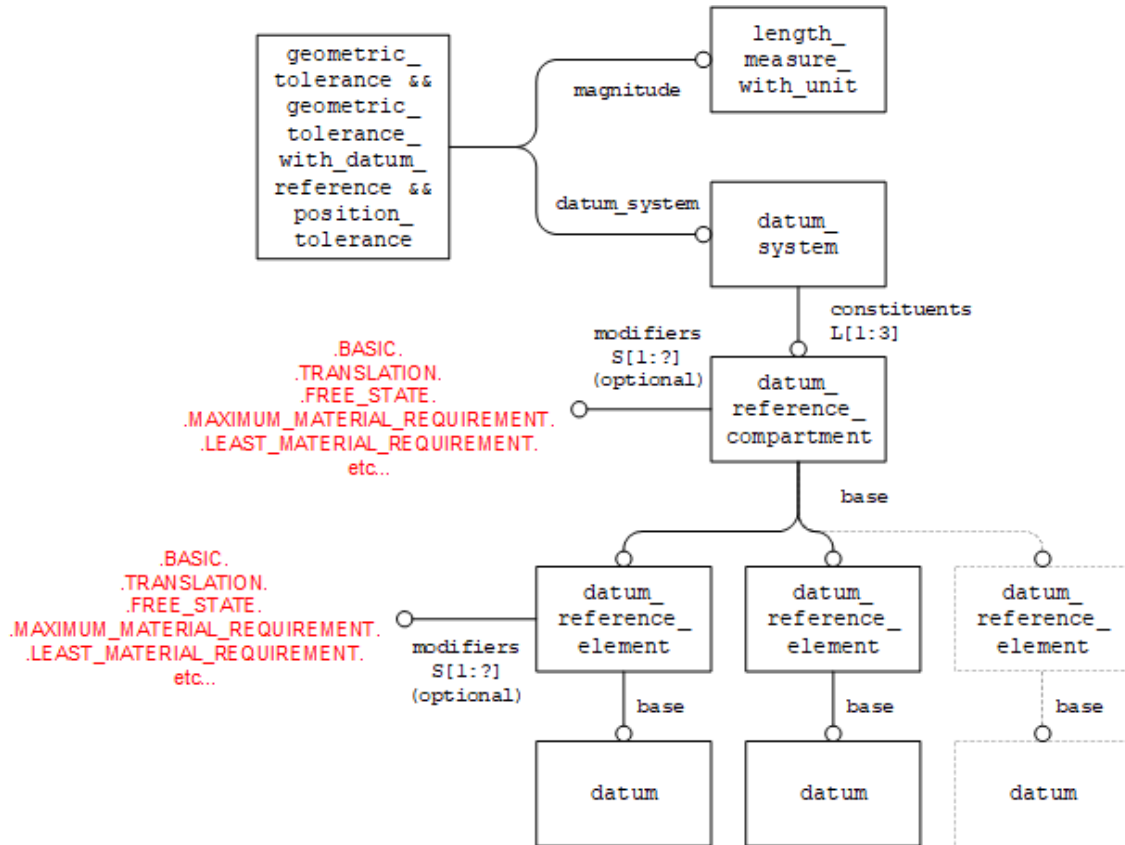


Figure 68: Common/Multiple Datum Instantiation

This structure enables modifiers to be applied to an individual datum reference using the optional modifiers attribute of the datum_reference_element entity as well as to the combined datum reference using the optional modifiers attribute of the datum_reference_compartment entity.

Note that the datum_reference_element entity can reference itself to support the concept of nested common/multiple datums. This structure also enables the optional modifiers attribute of the datum_reference_element entity to be used at any level in the nesting.

Part 21 Example

```
#1635=DATUM('D1', $, #41, .F., 'A');
#1672=DATUM_REFERENCE_ELEMENT('', $, #41, .F., #1635, (SIMPLE_DATUM_REFERENCE_MODIFIER(.MAXIMUM_MATERIAL_REQUIREMENT.)));
#1673=DATUM('D2', $, #41, .F., 'B');
#1709=DATUM_REFERENCE_ELEMENT('', $, #41, .F., #1673, $);
#1710=DATUM('D3', $, #41, .F., 'C');
#1736=DATUM_REFERENCE_COMPARTMENT(#1710, $);
#1746=DATUM_REFERENCE_COMPARTMENT(COMMON_DATUM_LIST(#1672, #1709), $);
#1747=LENGTH_MEASURE_WITH_UNIT(LENGTH_MEASURE(1.25), #28);
#1751=DATUM_SYSTEM('DS1', $, #41, .F., (#1746, #1736));
#1752=(GEOMETRIC_TOLERANCE('FC5', $, #1747, #1244)
    GEOMETRIC_TOLERANCE_WITH_DATUM_REFERENCE((#1751))
    GEOMETRIC_TOLERANCE_WITH_MODIFIERS(.MAXIMUM_MATERIAL_REQUIREMENT.)
    POSITION_TOLERANCE());
```


6.9.9 Composite Geometric Tolerances

Some tolerances have multiple requirements as represented by a multiple frame tolerance control frame whose visual representation is shown in Figure 69.

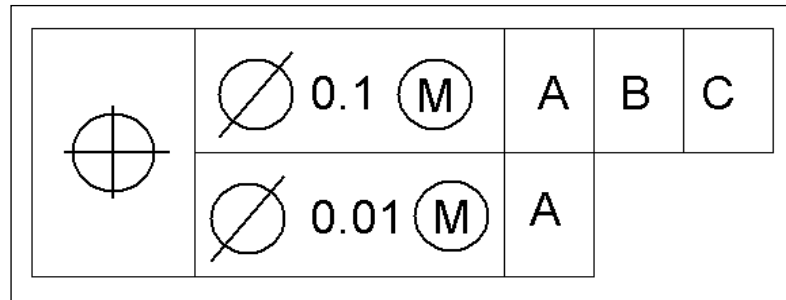


Figure 69: Composite Geometric Tolerance

This is implemented by creating the appropriate `geometric_tolerance` entity for each frame. The `geometric_tolerance` entities are then related via a `geometric_tolerance_relationship` entity. See Figure 70 for the structure of the tolerance depicted in Figure 69.

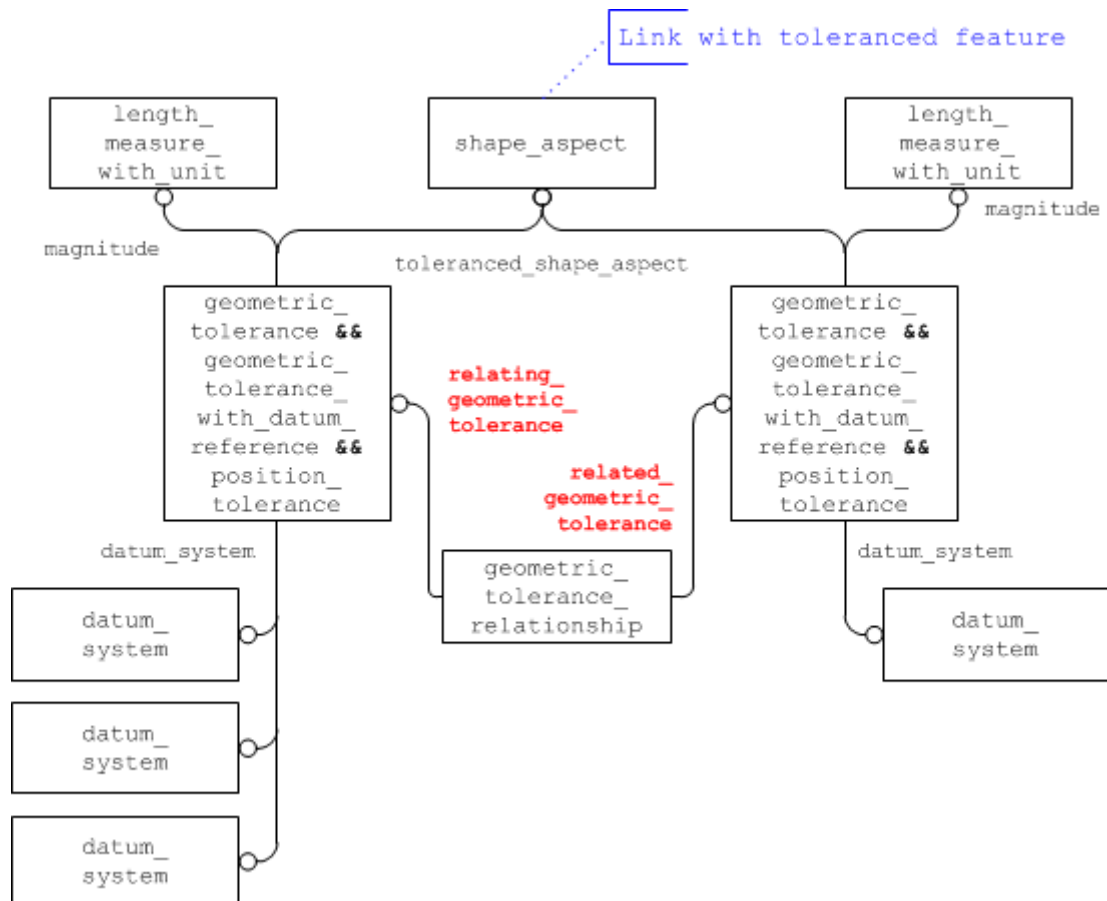


Figure 70: Composite Tolerance Structure

In the `geometric_tolerance_relationship` entity, the upper frame is the “relating” reference and the lower frame is the “related” reference. For tolerances with more than two frames, multiple `geometric_tolerance_relationship` entities are used to relate the frames together. For example, a tolerance with three frames would require two `geometric_tolerance_relationship` entities: one relating the top (“relating”) and middle frames (“related”), the second relating the middle (“relating”) and the bottom (“related”) frames. These relationships will allow the receiver to reconstruct the semantic relationships as well as the visual representation.

The `geometric_tolerance_relationship.name` attribute shall have the value of “composite”. Other valid values for this attribute include “simultaneity” and “precedence”. The meaning of these values is as follows:

- **composite:** For two adjacent segments the relating `geometric_tolerance` is the upper one, while the related one is the lower one. A chain of `geometric_tolerance_relationships` may be used to construct a composite of `geometric_tolerances` with more than two elements. This capability is to be used for representing composite positional tolerancing as defined in ASME Y14.5-2009.
- **precedence:** The relating `geometric_tolerance` is of higher priority than the related. Not recommended for use.
- **simultaneity:** The relating and the related `geometric_tolerance` shall be met simultaneously, when they reference the same datum system. Not recommended for use.

However, these apply to ASME PMI only, as within the ISO standards the “independence principle” applies: all PMI apply in the same way, independently from each other.

Part 21 Example

```
#307=SHAPE_ASPECT('',$,#223,.T.);
#310=GEOMETRIC_ITEM_SPECIFIC_USAGE('','tolerance
feature',$,#307,#199,#185);
#311=LENGTH_MEASURE_WITH_UNIT(LENGTH_MEASURE(0.2),#4);
#313=(GEOMETRIC_TOLERANCE('',$,#311,#307)
      GEOMETRIC_TOLERANCE_WITH_DATUM_REFERENCE((#1751))
      SURFACE_PROFILE_TOLERANCE());
#314=LENGTH_MEASURE_WITH_UNIT(LENGTH_MEASURE(0.1),#4);
#315=SURFACE_PROFILE_TOLERANCE('',$,#314,#307);
#316=GEOMETRIC_TOLERANCE_RELATIONSHIP('composite','',#313,315);
#1635=DATUM('D1',$,#41,.F.,'A');
#1672=DATUM_REFERENCE_ELEMENT('',$,#41,.F.,#1635,(SIMPLE_DATUM_REF
ERENCE_MODIFIER(.MAXIMUM_MATERIAL_REQUIREMENT.)));
#1673=DATUM('D2',$,#41,.F.,'B');
#1709=DATUM_REFERENCE_ELEMENT('',$,#41,.F.,#1673,$);
#1710=DATUM('D3',$,#41,.F.,'C');
#1736=DATUM_REFERENCE_COMPARTMENT(#1710,$);
#1746=DATUM_REFERENCE_COMPARTMENT(COMMON_DATUM_LIST(#1672,#1709),
$);
#1751=DATUM_SYSTEM('DS1',$,#41,.F.,(#1746,#1736));
```

7 Presentation of PMI Data

The previous sections in this document explained in detail how to define PMI data, i.e., dimensions, tolerances, datums and the like, in an intelligent, associative, machine-readable – hence reusable – way. This approach is referred to as “(Semantic) PMI Representation”. Though it provides all the necessary knowledge about the PMI, the information is by itself not visible for the user in the 3D model. This is where the Presentation capability comes in.

7.1 Basic Principles

Presentation refers to the capability to display and organize the PMI data in the 3D model in a way that it can be read and interpreted by humans. Presentation data may also be associative, so that the geometry a PMI element is related to becomes highlighted when the user selects that PMI element.

Three levels of PMI Presentation can be distinguished:

1. Graphic Presentation
2. Presentation Placeholders
3. Character-based Presentation

In **Graphic Presentation**, the PMI data as displayed on the source system is converted into geometric elements such as Polylines or Tessellated wireframes. The main intention of this approach is to preserve the appearance of any annotation. This approach is described in detail in Section 8.

A **Presentation Placeholder** will not provide an actual presentation of a PMI element itself, but it will provide a target system with authoring capabilities with all the necessary information to create the presentation for a PMI element in the correct location and with the correct associations to geometry and Saved Views. This approach is described in detail in Section 7.2.

Character-based Presentation is a fully defined presentation approach that uses actual 3D Text mechanisms to display the PMI data. It uses STEP entities such as `text_literal`, `leader_curve` or `pre_defined_terminator_symbol` to build the presentation for a PMI element. This is a very powerful mechanism, as it comprises styling information such as font, font size, curve style, and many others. The approach was described in older versions of this document and is still available in the Recommended Practices for Associative 3D Text, available on the CAX-IF homepages under “Joint Testing Information”.

However, discussions in LOTAR, the CAX-IF and related projects showed that this approach is very difficult to handle. The main challenges are character spacing and positioning as well as alignment of the associated geometry (e.g., the lines that build the feature control frame), since different CAD systems and also different user companies often use different fonts. It was therefore decided, at least for the time being, to concentrate on the Graphic Presentation capability and put the handling of Character-based Presentation on hold.

7.2 Presentation Placeholder

7.2.1 Requirements and Approach

The Presentation Placeholder, as the name suggests, is not an actual Presentation approach, as it will not display anything in the 3D model. It provides a placeholder, with information about the position, orientation, and organization of an annotation. Thus, a target system with PMI authoring capability will be able to (re-)create the actual presentation of a PMI element based on its Semantic Representation data. It intends to provide a minimal set of presentation information to CAD systems, which require information such as the leader line attachment point on the part geometry in order to create the corresponding Semantic PMI Representation elements.

The original working title for this capability was “Minimal Presentation”, but that term was found to be too confusing and hence was changed to “Presentation Placeholder”.

It can be used on its own, which will provide no immediate presentation of the PMI data in the STEP file, i.e., it will not show up in a viewing application, but it will provide the necessary starting point to create the presentation in a capable target application in a semi-automated way. It can also be combined with Graphic Presentation, where it will provide helpful additional information in case the PMI data is updated in the target application. This makes it necessary to replace the previous graphic annotation with a new one, maintaining positioning and view assignment.

A Presentation Placeholder consists of:

- One `axis2_placement_3d`, which defines the location and orientation for the annotation, according to the following convention:
 - The x axis indicates the reading direction
 - The y axis points upward from the base to the top of the characters
 - The z axis points towards the reader
 - The origin is at the left side vertical center of the annotation, as indicated in Figure 71 below.
- Optional: a `planar_box` indicating the extent of the annotation, i.e., the text or feature control frame without leader and witness lines.
 - The intent is that the target system can make the actual content generated for the placeholder fit inside that box, in order to avoid overlapping annotations.
 - This information could also be used to support auto-mirroring / auto-rotation of annotations.
- Optional: one or more `cartesian_points`, which can be used to convey additional positional information.
 - **Note:** In versions 4.0.7 and earlier of this document, the `cartesian_points` were used to indicate the position and routing of the leader line(s). The amendment of AP242 Edition 2 introduces a dedicated mechanism for that, see section 7.2.4.
- Optional: one or several `annotation_text`. This is not used in the context of this document; however, it is included in the entity definition to provide compatibility with character-based annotation (see Recommended Practices for 3D Associative Text).

Figure 71 below illustrates the information a Presentation Placeholder provides relative to a Graphic PMI Annotation:

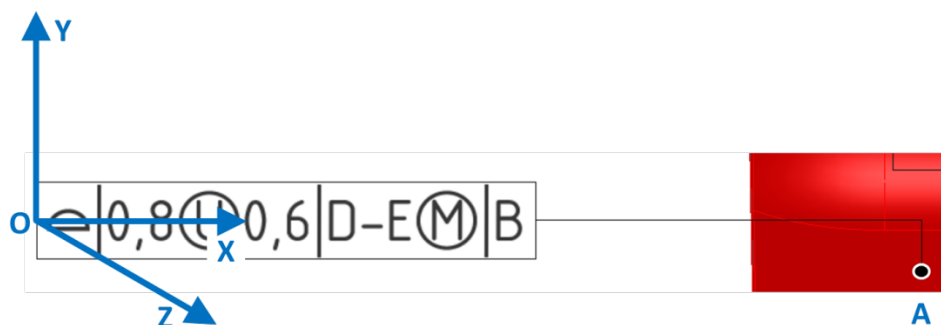


Figure 71: Presentation Placeholder Conceptual Sketch

Even though the Presentation Placeholder by itself does not appear on screen, it can convey a range of presentation-relevant data because it inherits the characteristics of an `annotation_occurrence`:

- Assignment to Saved Views
- Association with `annotation_planes`
 - to ensure that the X-Y plane of the placement is parallel to the definition of the `annotation_plane`
- Linked to Geometry
- Linked to Semantic PMI Representation
 - **Note:** in order to satisfy the specific requirements for using a placeholder with PMI data, there is a specific way to create this link. See section 7.2.3 for details.
- Assignment of PMI Validation Properties (Affected Geometry; see section 10.2.3.3.2)
- Implementation in a way that is consistent with the other types of PMI presentation, so that the placeholder can be used in conjunction with Polyline or Tessellated annotations (see section 8.3).

7.2.2 Implementation of the Presentation Placeholder

In AP242 Edition 3, a new entity type named `annotation_placeholder_occurrence` (APO) has been created, which works in the same way as the other `annotation_occurrence` subtypes for Polyline and Tessellated Presentation.

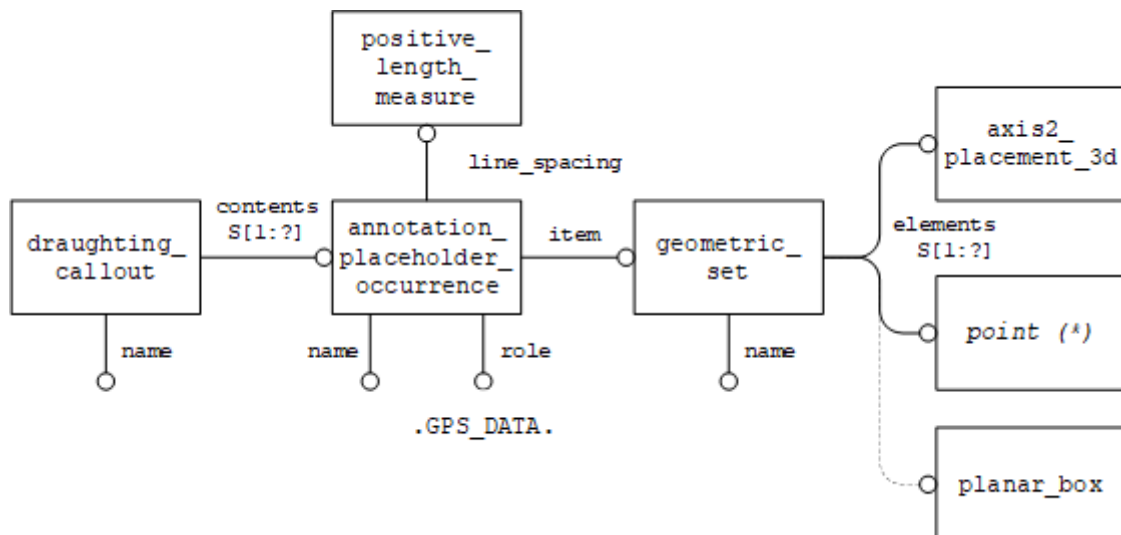


Figure 72: Presentation Placeholder Instance Diagram

Attribute population:

- `draughting_callout.name` and `APO.name` carry the user name of the annotation, e.g., 'Linear_Size.1'.
- `APO.role` can be either `.GPS_DATA.` or `.ANNOTATION_TEXT.` For use with Semantic PMI, `.GPS_DATA.` must be used.
- `APO.character_height` is a `positive_length_measure` indicating the distance along the y-axis of the axis placement included in the `geometric_set`, between the top of one character instance on one line, and the top of another instance of the same character on the line above (below) the first character instance. Thus, this measure actually provides a line distance, from which the character height can be derived. It is intended to improve the rendering of multi-line text.

Note: the `positive_length_measure` for the `APO.line_spacing` is a simple `POSITIVE_LENGTH_MEASURE`.

- `geometric_set.name` indicates the PMI type, as defined in section 8.4, Table 18.
- `point` can be `cartesian_point`, `point_on_curve`, or `point_on_surface`; one for each attachment point to the part geometry.
- `planar_box` is optional.
- The population of `APO.name` and `geometric_set.name` in a way that is consistent with the recommendations given in section 8.1.1 and 8.2 respectively is important, especially in case the placeholder is combined as a subset together with graphic presentation elements into a `draughting_callout`, see section 8.3. Also see the related Note in section 7.2.3 below.

7.2.3 Linking the Placeholder to PMI Data

In general, the pattern to link a Presentation Placeholder with its underlying Semantic PMI Representation information works in the same way for any other type of PMI Presentation, described in section 7.2.5 below.

However, it needs to be ensured that for each Placeholder, there actually is a Semantic PMI element that provides the content information for this placeholder. This is done by using a new subtype of `draughting_model_item_association`, called `draughting_model_item_association_with_placeholder` (DMIAPW). It has one additional attribute, which points to the `APO`. Vice versa, there is an `INVERSE` relationship defined on `APO` that requires it to be referenced by a `DMIAPW`.

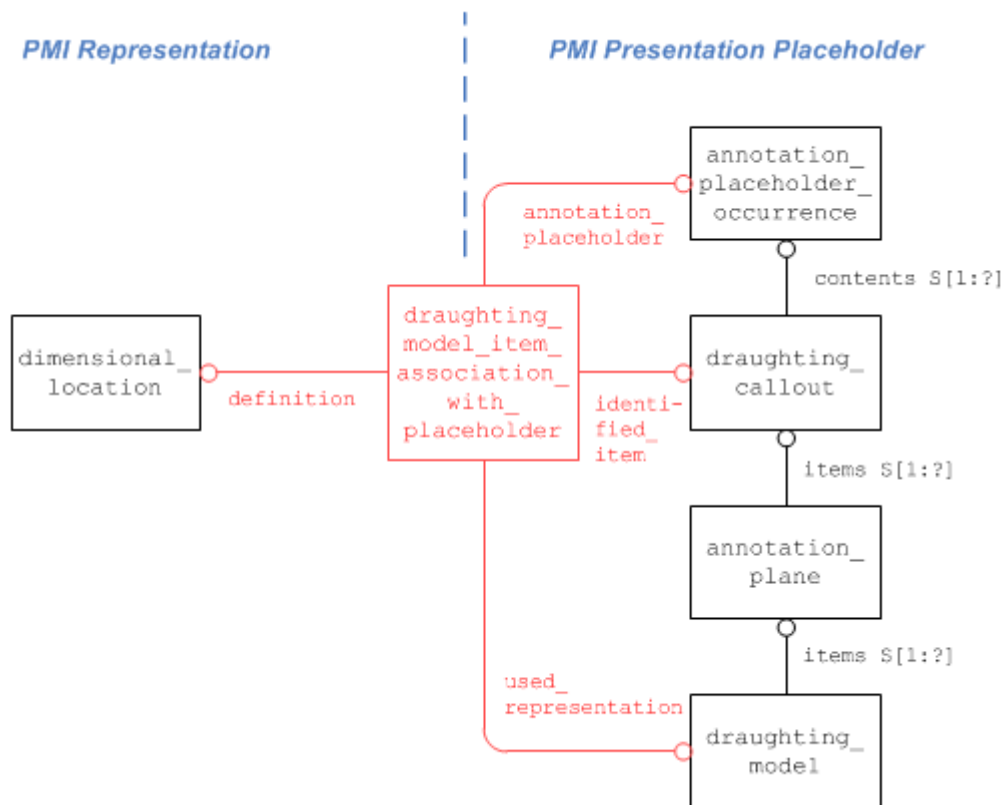


Figure 73: Linking PMI Representation to Presentation Placeholder

Note: It will be a task for pilot projects to work out the exact relationships between APO, DMIAWP, and the related Semantic PMI elements. Special cases of interest include stacked and composite tolerances, i.e., where more than one Semantic PMI element is displayed in the same annotation. This causes difficulties when trying to match the value of `geometric_set.name` with the type of PMI element linked to it. Another question to yet determine is whether there can be only one placeholder per annotation (= `draughting_callout`), or if several are allowed (and what that means).

7.2.4 Placeholder Leader Lines

Leader lines, dimension lines, extension lines or witness lines are important parts of an annotation as they provide information to what model elements the annotation applies, and in which way. Hence, in order to successfully recreate the annotation from the placeholder in the target system, additional information needs to be given.

AP242 Edition 3 introduced the new subtype `annotation_placeholder_occurrence_with_leader_line`, which has an additional attribute for a set of leader lines. Different types of leader lines are available.

Each leader line is defined by an ordered list of `apl1_points`. These are subtypes of `cartesian_points` with additional rules and conditions for use in leader lines. They also have an attribute `symbol_applied`, which is an enumeration (`TYPE des_apl1_point_symbol`) allowing to define typical symbols occurring along leader lines, such as arrow heads or circles.

For leader lines ending on the part shape, the subtype `apl1_point_with_surface` has an additional attribute `associated_surface`, which references the respective `face_surface` in the model.

Three types of leader lines can be defined:

- `annotation_to_model_leader_line`: starts at the annotation the placeholder is for, ends on the model (near a surface or curve). The last point in the list must be an `apl1_point_with_surface`.
- `annotation_to_annotation_leader_line`: starts at the annotation the placeholder is for, ends at another annotation (e.g., a datum on a feature control frame).
- `auxiliary_leader_line`: starts at an arbitrary location in free space, ends on the model, and complements an `annotation_to_model_leader_line`. The last point in the list must be an `apl1_point_with_surface`.

Figure 74 below illustrates the first two types:

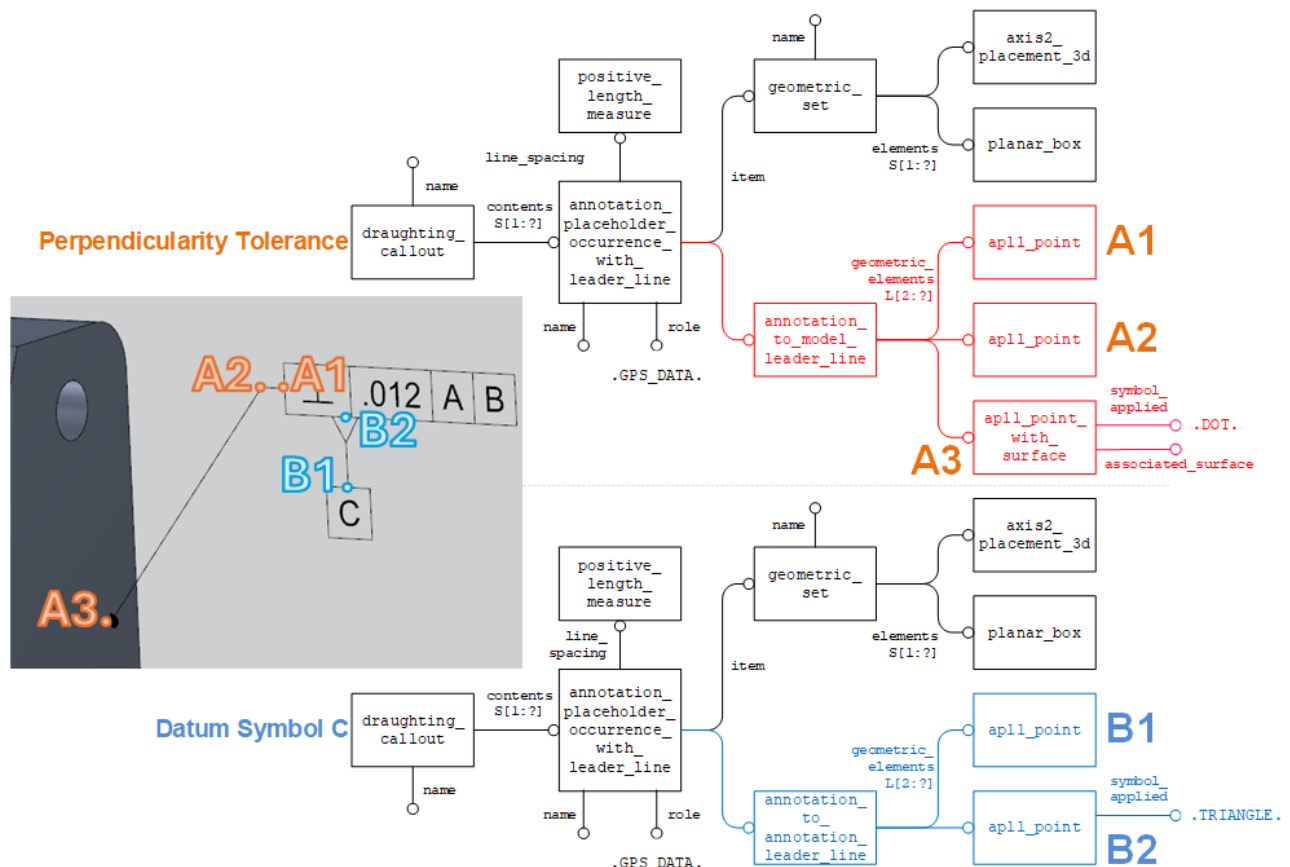


Figure 74: Presentation Placeholder with Leader Lines Example

7.2.5 Combining Placeholder with Graphic Presentation

In many cases, Presentation Placeholders will be used in combination with Graphic Presentation. This provides an ad-hoc display of the information provided in the model as well as the means to recreate the annotations in the target system if updates are made.

The mechanism to implement this is basically the same as the one presented for “Graphic Annotation Subsets” further down below, in section 8.3. The `annotation_placeholder_occurrence` and the `tessellated_annotation_occurrence` are combined in the same `draughting_callout`.

In consequence, only one `draughting_callout` shall be used per PMI element, collecting all presentation-related information.

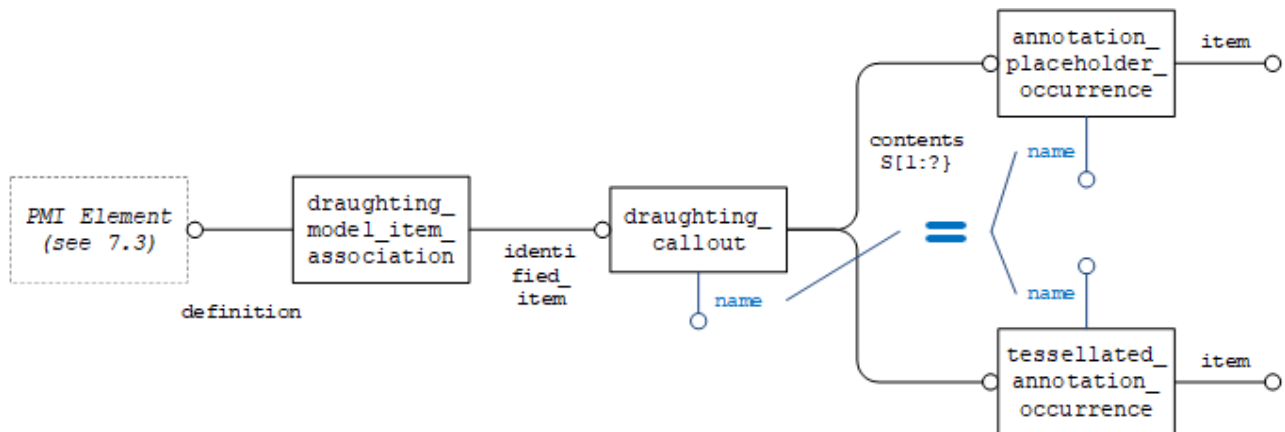


Figure 75: Combining Placeholder and Graphic Presentation

7.3 Linking PMI Representation to Presentation

While the two basic approaches to transfer PMI data – Representation and Presentation – can exist in an unrelated, parallel way in a STEP file even though each of them is fully defined, there is a lot to be gained when the two are linked together.

STEP files which contain PMI Representation and Presentation in a linked way can be applied in downstream processes using the Representation, as well as for documentation purposes using the Presentation. But even more important, they allow for updating of individual Presentation elements when the model is modified at a later point in time.

In this case, the Representation provides the editable definition of the PMI, while the Presentation linked to it provides the data concerning position, styling and organization of the displayed element, so that a new Presentation element for the updated data can be created to replace the old one while preserving its behavior.

Links between Representation and Presentation often create n:m relationships, as several Representation elements may be presented in one Presentation element (e.g., a dimension with a datum attached), and vice versa there may be several Presentation elements for one Representation element if it is displayed in different ways in different views for instance.

The core entity to create these links is `draughting_model_item_association` (DMIA), with its attributes used in the following way:

DMIA.attribute	Usage
name	'PMI representation to presentation link'
description	(optional)
definition	The PMI Representation element
used_representation	The 'global' draughting_model (see section 9.2)
identified_item	The PMI Presentation element (<code>draughting_callout</code> or <code>annotation_occurrence</code>)

Table 16: Usage of DMIA to link Representation with Presentation

On the Presentation side, the target entity will always be either a `draughting_callout` or an `annotation_occurrence`. They serve as “anchor” for any presentation element, independent of whether it is a graphic presentation or a full semantic presentation (3D Text).

On the Representation side, the following entity types (and complex instances of) can be referenced by the definition attribute:

- `dimensional_location` (`shape_aspect_relationship`)
 - `dimensional_location_with_path`
 - `dimensional_location_with_datum_feature`
 - `angular_location`
- `dimensional_size`
 - `dimensional_size_with_path`
 - `dimensional_size_with_datum_feature`
 - `angular_size`
- `geometric_tolerance`
 - `geometric_tolerance_with_defined_unit`
 - `geometric_tolerance_with_defined_area_unit`
 - `geometric_tolerance_with_modifiers`
 - `geometric_tolerance_with_maximum_tolerance`
 - `modified_geometric_tolerance`
 - `unequally_disposed_geometric_tolerance`
 - `cylindricity_tolerance`
 - `flatness_tolerance`
 - `line_profile_tolerance`
 - `position_tolerance`
 - `roundness_tolerance`
 - `straightness_tolerance`
 - `surface_profile_tolerance`
 - `geometric_tolerance_with_datum_reference`
 - `angularity_tolerance`
 - `circular_runout_tolerance`
 - `coaxiality_tolerance`
 - `concentricity_tolerance`
 - `parallelism_tolerance`
 - `perpendicularity_tolerance`
 - `symmetry_tolerance`
 - `total_runout_tolerance`
- `datum_feature` (`shape_aspect`)
- `placed_datum_target_feature` (`datum_target<=shape_aspect`)

7.4 Transfer of Editable Text for Notes

7.4.1 Background and Motivation

When looking closely at the definitions of the Semantic PMI Representation elements in the previous sections, and the Graphic PMI Presentation capabilities in the following sections, it becomes evident that there are some gaps between the two worlds.

The semantic PMI elements supported in AP242 are all based on the respective dimensioning standards and can convey the often-complex data structures associated with a dimension, tolerance or datum.

Graphic presentation, however, can carry any information – such as is defined in a dimensioning standard, but also arbitrary text notes. However, such text notes may not be so arbitrary after all – they can contain title block information and other instructions that cannot be conveyed with a few formalized symbols, but all highly relevant in a PMI context. Transferring these notes only as graphic presentation results in a loss of information, as they cannot be imported into the appropriate data fields, much less edited in the target system.

In the PMI entities described in this document thus far, such text notes do not have a “semantic” counterpart. The term “semantic” must be used here with caution, however, as these notes are typically not aimed at fully automated computer consumption but require human interpretation. The important point is that they need to be editable in the target system.

Character-based Presentation as mentioned in section 7.1 above is a theoretical solution to this problem, as it contains the textual content of the note as an actual string value. It is, however, not practical because it requires a large set of presentation information and is also known to cause issues with different fonts. The interested reader can find details in the Recommended Practices for 3D Associative Text, available on the CAX-IF homepages under “Joint Testing Information”.

7.4.2 Recommended Approach

Since in the context of this document all necessary presentation information is already conveyed by means of either Graphic Presentation (section 8) or the Presentation Placeholder (section 7.2) – or both – all that is needed is to transfer the content of the note as a text string.

This will be done using the User Defined Attributes (UDA) approach. See section 7.1 (Descriptive / String Attribute) of the Recommended Practices for User Defined Attributes, which are available on the CAX-IF homepages under “Joint Testing Information”.

The entity used to anchor the editable text to the model is a `property_definition`, which means that such text strings can be attached anywhere a validation property, or a UDA can be attached. Refer to section 6 of the UDA Recommended Practices for attachment at the part or geometry level, and section 10.1 below for attachment at semantic PMI elements. Figure 77 below illustrates the case of linking the note to a portion of the part shape.

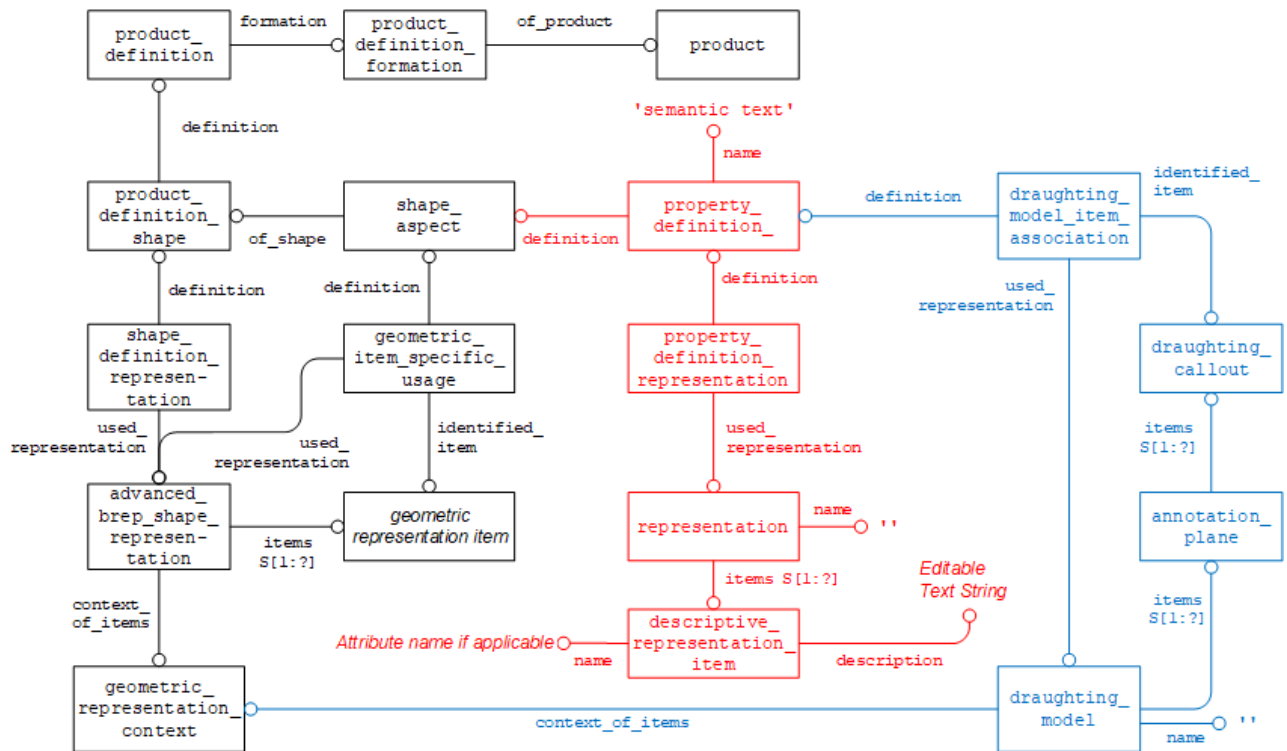


Figure 77: Editable Text at Geometry Level (red) with Graphic Presentation (blue)

The `property_definition.name` shall be set to “semantic text” to clearly identify the purpose of the subsequent data. In case the editable string is stored in a variable with a given name, that name can be conveyed in `descriptive_representation_item.name`, while its `description` attribute holds the actual string.

In the case of notes comprised of several lines of text, it is recommended to create one `descriptive_representation_item` for each line of text.

Each attribute, taken as a “semantic” element, can be linked to its presentation using the mechanism defined in section 7.2.5 above. The definition of any UDA starts with a `property_definition`, which can be directly referenced by `draughting_model_item.definition` (see Figure 76). This is another way of identifying semantic text strings.

7.4.3 Semantic Text Validation Properties

As such text notes can carry relevant production and manufacturing information, it needs to be ensured that none get lost during any data exchange, including archiving and retrieval scenarios. Hence, a set of validation properties will be defined.

In a first step, these consist of a set of counts cumulated at the part level, see section 10.1.1, Figure 107 for implementation details. The `property_definition` holding the validation property value shall have a `name` of ‘pmi validation property’. As each validation property is a count, they are all represented by `integer_representation_items`. The table below provides an overview of the magic string to be used in its `name` attribute along with a definition of what this property represents.

Note that for validation purposes, the ‘notes’ to be counted are defined by a `property_definition` with `name = 'semantic text'`. The count does not apply to the constituent `descriptive_representation_items`, as those might be split and merged differently by different system (also see 7.4.4 below).

<code>integer_representation_item.name</code>	Validation Property Definition
'number of semantic text notes'	The total number of semantic text notes defined on this part. This includes all notes defined on the part directly as well as any subordinate element (geometry, PMI...)
'number of semantic text notes on part'	The number of semantic text notes defined directly on the part, i.e., <code>property_definition.definition</code> → <code>product_definition_shape</code>
'number of semantic text notes on geometry'	The number of semantic text notes defined on geometric elements
'number of semantic text notes on PMI'	The number of semantic text notes defined on PMI elements

Table 17: List of Validation Properties for Editable Text for Notes

As usual with such counts, if any count amounts to zero because there are no semantic text notes defined on PMI elements in the model, then this count shall not be omitted, but included with a value of “0.” This indicates that nothing was lost.

7.4.4 Open Discussions

Title block information may consist of a mixture of arbitrary text and semantic PMI elements, as shown in this example taken from the title block in NIST’s FTC-06 test case (see section 1.3):



This can be broken down to:

- UDA: “4.”
- Semantic Profile Tolerance
- UDA: “APPLIES TO ALL UNTOLERANCED SURFACES.”

There are three representation elements, which can be linked to the same presentation element. What is not preserved by this is the order of the representation elements. It has not yet been decided if that order is important, or how important it is; in other words, whether it needs to be stored and how.

One proposal for this case is to store two lines of text, the first line being “4. APPLIES TO ALL”, with blanks inserted to provide space for the feature control frame, and the second line being “UNTOLERANCED SURFACES”.

Another, but closely related, topic is that of text notes directly related to feature control frames, such as “BOUNDARY” or “4x INDIVIDUALLY”. Such additional text can be in one of four locations relative to the FCF: above, right, below or left. It will be helpful to indicate this relative location.

There is no agreed upon solution for this yet; a tentative proposal is to use `descriptive_representation_item.name` and populate it with the user name of the PMI element represented by the FCF and the relative location, for instance “Flatness.2 above”.

8 Graphic Presentation

This section deals with the presentation of PMI elements and annotations in graphical form. The two related capabilities available in AP242 are “Polyline Presentation” and “Tessellated Presentation”. This means that the information to be displayed is broken down into geometric elements. The advantages of Graphic Presentation are that since it is rendered, it is presented in the STEP file exactly as it was in the CAD system. Since the instantiation is done using basic geometric entities, basically every viewer or CAD system which finds the link in the file structure can display it.

The “Polyline Presentation” approach was originally developed with AP203e2 and AP214e3. It is used with these APs even though there are some restrictions and differences in the implementation approaches. This is described in a separate document, the “Recommended Practices for Polyline Presentation” [1]. The following sections in this document deal exclusively with the implementation of Graphic Presentation based on AP242 (DIS and later).

The information to be presented can be converted to geometry in different ways, which have an impact on how they will become instantiated in the STEP file. The main characteristics are:

- **Outline Characters:** Elements are shown by their outline.
- **Filled Characters:** Elements are shown as solid or filled.
- **Stroked Characters:** Elements are defined by their centerline
- **Geometric Elements:** These include leader and witness lines, bounding boxes of feature control frames, and arrows (which may be filled).

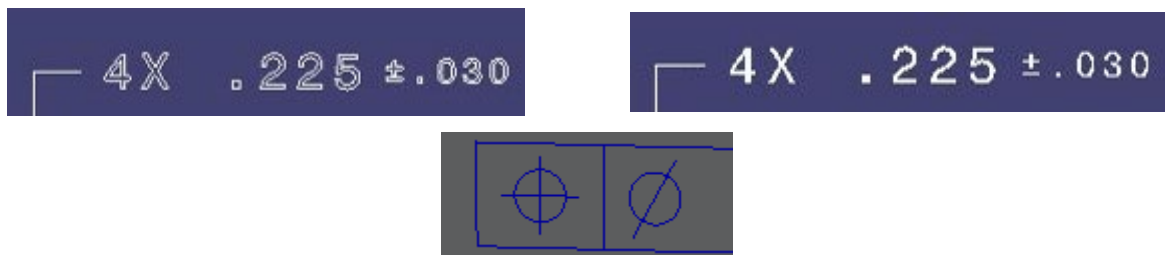


Figure 78: Outline Characters (upper left), Filled Characters (upper right), Stroked Characters and Geometric Elements (below)

Independent from this, Graphic Presentation elements can be styled and arranged in Saved Views (see section 9.3.2) to provide the relevant set of PMI data to the user in the format defined on export. The definition of various validation properties (see section 0) help to ensure the correctness and completeness of the information displayed.

Independent from the actual graphic presentation approach – basic polylines, filled polylines, or tessellated – the assumption is always that all elements within the respective geometric set for one annotation are coplanar. However, there are CAD systems (NX, for instance) that allow the definition of annotations where the leader line is not in the same plane as the annotation. Technically, the STEP data model supports this case, but there are CAD systems not supporting this capability for graphic presentation of PMI (such as CATIA and Creo). In this case, these systems will project the leader line onto the annotation plane. As a result, the leader line will no longer be attached to the target geometry, making correct interpretation difficult.

Preprocessor Recommendations

Create all annotations in the native system so that they are coplanar, including their leader lines. “Restricted area” is a special case, which is handled best using Supplemental Geometry for presentation.

Postprocessor Recommendations

If non-coplanar annotations are encountered, project them onto the annotation plane.

8.1 Polyline Presentation

A polyline is a line created by a series of short straight-line segments. The entity `polyline` is defined in Part 42.

Using this type of entity, each PMI feature and 3D annotation can be exported as a `geometric_curve_set` of `polylines`, `circles` and `trimmed_curves` where the basis curve is a `circle` (circular arcs). Polylines are defined by a list of `cartesian_points`. The use of `composite_curves` is also allowed; see section 8.1.2 below for details.

Note that these shall be located in a plane parallel to the definition plane of the `annotation_plane` the PMI element is assigned to, as described in section 9.1 below. Each Polyline annotation must be in set of elements of an `annotation_plane`.

8.1.1 Basic Polylines

The following figure illustrates the basic structure for a PMI element presented by Polylines. This can be used to handle stroked and outline characters, as well as geometric elements:

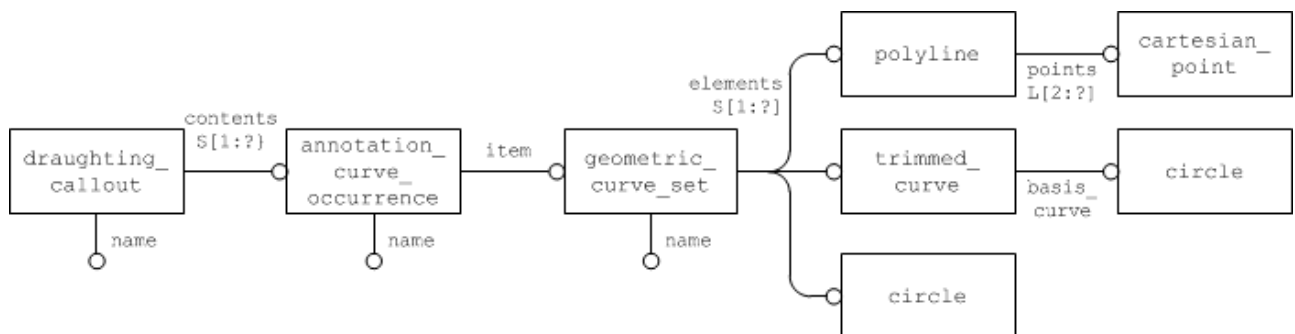


Figure 79: Basic Polyline Definition

Part 21 Example

```
#576=DRAUGHTING_CALLOUT('Simple Datum.1', (#581));
#581=ANNOTATION_CURVE_OCCURRENCE('Simple Datum.1', (#580), #577);
#577=GEOMETRIC_CURVE_SET('datum', (#582, #592, #597, #600, #606));
#582=POLYLINE('Simple Datum.1', (#583, #584, #585, #586, #587, #588, #589, #590, #591));
#592=POLYLINE('Simple Datum.1', (#593, #594, #595, #596));
#597=POLYLINE('Simple Datum.1', (#598, #599));
#600=POLYLINE('Simple Datum.1', (#601, #602, #603, #604, #605));
#606=POLYLINE('Simple Datum.1', (#607, #608, #609, #610));
```

Preprocessor Recommendations

The starting point for every annotation shall be a `draughting_callout`. Though technically this is not mandatory, it is highly recommended to create it so, that:

- `draughting_callout` is the starting point for each annotation, regardless of the technical approach used to present this annotation (i.e., Polyline, Tessellated or Character-based Presentation). This way, all capabilities that relate to annotations (e.g., annotation validation properties, linking annotations to geometry / other annotations / PMI representation) can be defined independently from the actual presentation approach.
- `draughting_callout` is the collector for all constituents of an annotation, i.e., what is one annotation in the CAD system shall be one `draughting_callout` in the STEP file, even

or especially when the annotation is split into several subsets for text and geometry or stroked and filled elements (see section 8.3).

- `draughting_callout.name` is the “user name” of the annotation. In most cases, this name is automatically assigned by the system; it is the name by which the annotation is known to the user e.g., in the model tree.
- `annotation_curve_occurrence.name` repeats the “user name” of the annotation, in order to maintain compatibility with implementations not using the `draughting_callout`.
- `geometric_curve_set.name` indicates the presented type of PMI; see section 8.4 below for details.

Postprocessor Recommendations

In cases where a `draughting_callout` is not present, the `annotation_curve_occurrence` is the starting point for the Polyline annotation. This is the case e.g., for all AP214e3 and AP203e2 implementations of Polyline Presentation (see [1] for details).

8.1.2 Filled Polylines

The next figure shows the definition of a set of filled polylines. Note that the geometric definition of the boundaries is the same as above. The specific subtype of `annotation_occurrence` carries the information that these characters are to be filled.

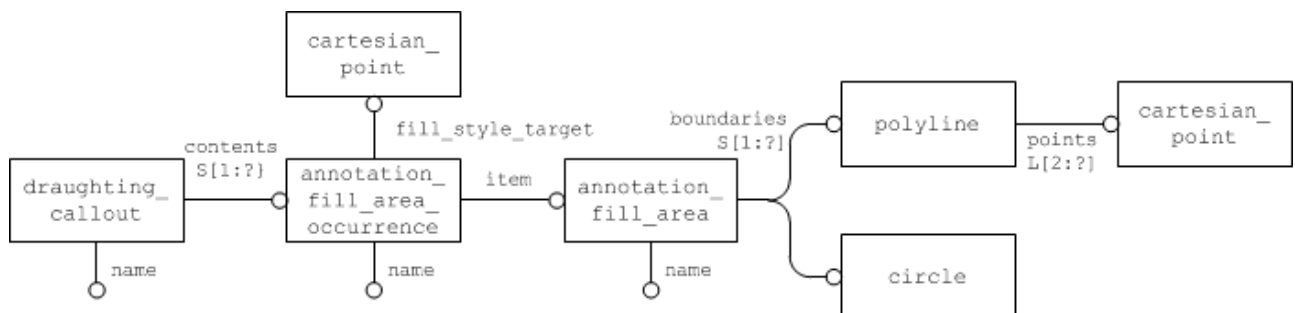


Figure 80: Filled Polyline Definition

Preprocessor Recommendations

The curves referenced as boundaries of the `annotation_fill_area` need to fulfill the following requirements:

- Each boundary must be a closed curve
- No two of these closed curves may intersect
- All boundaries must be coplanar.

It can have several outer boundaries in one set, so an entire text string can be presented with one `annotation_fill_area`. One “inner point” needs to be defined to indicate where the filling shall start. Even though efficient algorithms are available to determine the filled and unfilled portions of the annotation, the following convention can help to simplify the process, if the STEP processor can manipulate the `polylines` this way:

- outer boundaries (enclosing a filled area) shall be oriented in a positive sense, i.e., counter-clockwise (by giving the points defining the polyline in the appropriate order)
- inner boundaries (enclosing an unfilled area) shall be oriented the opposite way, i.e., clockwise.

Note that due to the various algorithms that exist to determine the inner and outer boundaries in a set of closed curves like this, geometrically it would be most efficient to have only one outer boundary per `annotation_fill_area`. But that would inflate the STEP file structure and make evaluation and specifically validation much more complicated, if not impossible. It is therefore strongly recommended to not split up annotations below the granularity corresponding to the “Equivalent Unicode String” (see section 10.2.3.2). For instance, all boundaries belonging to the presentation of the real value “3.200” have to be in the same `annotation_fill_area`.

The use of Composite Curves

Especially for the support of Filled Polylines, it can be meaningful to group geometric elements together in order to describe more complex boundaries consisting of Polylines as well as trimmed curves (circular arcs). This allows to render complex characters in a more exact way, e.g., to construct the shape of a ‘D’ from a polyline and a half circle.

Hence, each boundary can be described as a `composite_curve`. Each portion of the boundary is declared as a `composite_curve_segment`, and the `transition` attribute helps to satisfy the requirements for the boundaries of an `annotation_fill_area` as listed above.

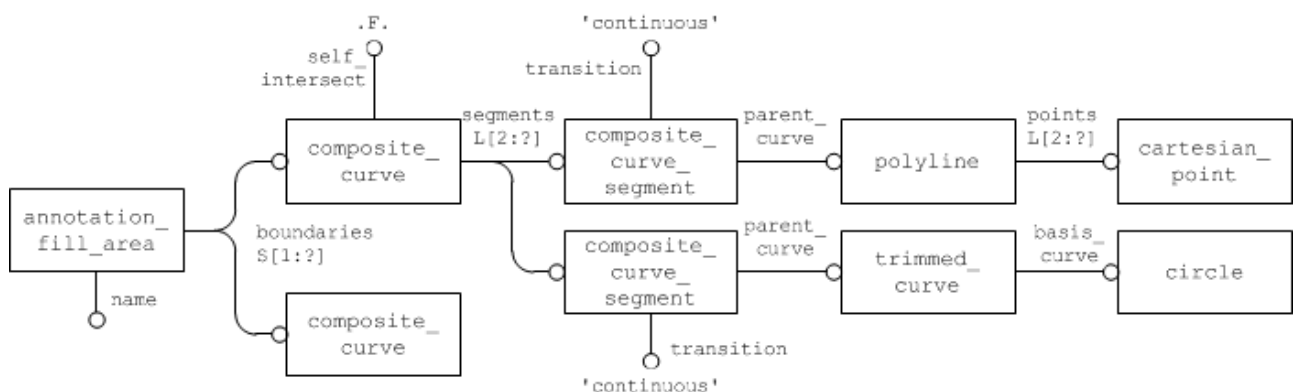


Figure 81: Definition of boundaries using composite_curves

Concerning the attribute values of `composite_curve` and `composite_curve_segment`, the following recommendations are given:

- `composite_curve.self_intersect` strictly must be `FALSE` for the boundaries of Filled Polylines
- `composite_curve_segment.transition` shall always be `'continuous'` with one exception: it may be `'discontinuous'` for the last segment of a `composite_curve` to indicate it is open, e.g., when using it for stroked font or geometric elements in an annotation.
- `composite_curve_segment.same_sense` can be used to manipulate the boundary orientation, hence indicating inner and outer boundaries as described above.

Postprocessor Recommendations

In case an importing STEP processor capable of handling only basic polylines (see 8.1.1) encounters a file with filled polylines (as defined in 8.1.2), these can still be imported by re-interpreting them in the following way:

- treat the `annotation_fill_area_occurrence` as if it were an `annotation_curve_occurrence`. The `cartesian_point` given as fill style target as well as any `fill_area_styles` shall be ignored. `curve_styles`, however, can be processed as usual.
- treat the `annotation_fill_area` as if it were a `geometric_curve_set`.

8.2 Tessellated Presentation

Starting with AP242 DIS, the new data model for tessellated geometry is available, and provides an alternative approach for graphic presentation. The implementation structure itself is very similar to the Polyline approach described above, with the simplification that it is not necessary to distinguish between filled and unfilled elements, as they can be mixed in one tessellated annotation. The general conception is that especially for filled characters, the use of tessellated elements is much more efficient than the original approach described in 8.1.2.

The general approach to using tessellated geometry in STEP AP242 is described in the Recommended Practices for 3D Tessellated Geometry.

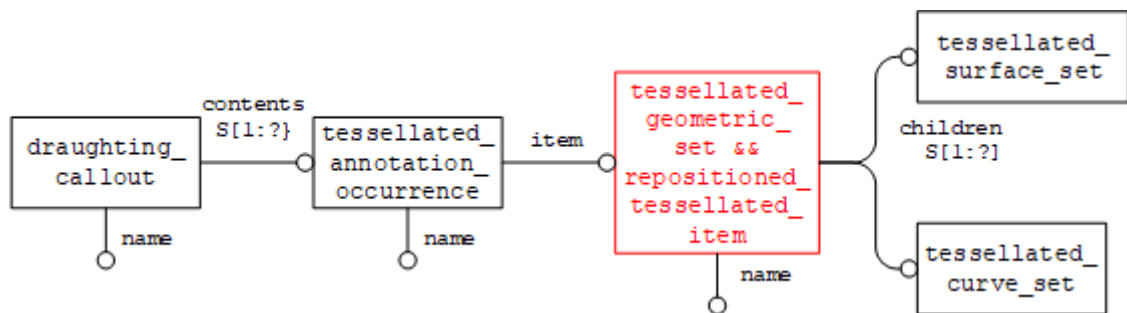


Figure 82: Definition of a Tessellated Presentation

The following rules apply for the creation of a tessellated annotation:

- The starting point for each tessellated annotation shall be a `draughting_callout` so that it can be universally referenced by other capabilities
- The `draughting_callout.name` and `tessellated_annotation_occurrence.name` carry the “user name” of the annotation (same as for Polylines)
- The `tessellated_geometric_set.name` indicates the presented PMI type; see section 8.4 below for details.
- All filled elements of the annotation are collected by `tessellated_surface_set`.
 - **Note:** this used to be restricted to `complex_triangulated_surface_set`. Older STEP interface implementations may support only this type for filled elements.
- All stroked and outline elements of the annotation are collected by `tessellated_curve_set`.
- All `coordinates_lists` contain 3D coordinates.
- In order to make the implementation more efficient from a data size point of view, and based on the fact that within each annotation all geometric elements are coplanar, it is recommended to create a complex instance of `tessellated_geometric_set` with `repositioned_tessellated_item` (see highlighted entity in Figure 82) so, that for all coordinates in the referenced `coordinates_lists`, the third coordinate equals 0.

Important note: the `coordinate_lists` of tessellated items are defined as set of `REAL` elements, whereas the coordinates for geometric items such as `cartesian_points` are defined as list of `length_measure` elements. This means that in order to ensure correct interpretation of the tessellated coordinates, a global unit definition is required. This can be achieved by including all instances of `tessellated_annotation_occurrence` in the set of items of a `tessellated_shape_representation`.

In AP242 Edition 1, this must be created as an independent entity, as only `tessellated_items` are allowed in its set.

From AP242 Edition 2 on, this can be simplified by creating a complex entity for the global `draughting_model` (see section 9.2 below) together with `tessellated_shape_representation`. This is because the requirements have been relaxed so that there needs to be at least one `tessellated_item` in the set, but other elements (such as `annotation_planes` or `axis2_placement_3d`) can be included as well.

Part 21 Example:

```
#42 = DRAUGHTING_CALLOUT('pmi.2', (#43));  
#43 = TESSELLATED_ANNOTATION_OCCURRENCE('pmi.2', (#62), #44);  
#44 = (REPOSITIONED_TESSELLATED_ITEM(#46)  
      REPRESENTATION_ITEM('linear dimension')  
      TESSELLATED_GEOMETRIC_SET((#45))  
      TESSELLATED_ITEM());  
#45 = TESSELLATED_CURVE_SET(#47, ([...]));  
#46 = AXIS2_PLACEMENT_3D('', #63, #64, #65);  
#47 = COORDINATES_LIST('', [...]);
```

8.3 Graphic Annotation Subsets

There are several reasons why a presentation element that is a single annotation in the source system may get split into several annotations during export to STEP. For instance with Polylines it is clear that stroked/outlined elements will be in a separate annotation from filled elements due to the different required entity types (see 8.1.1 and 8.1.2), or a processor may decide to distinguish between textual and graphical elements of an annotation.

Basically, all kinds of graphic presentation can be combined into a single annotation; it is thinkable to have the filled characters of the text as tessellated elements, in combination with basic polylines for the leader lines and other geometric elements.

Preprocessor Recommendations

In all cases, the collector for all subsets of an annotation is the `draughting_callout`. The following rules apply:

- For each annotation, there shall be exactly one `draughting_callout` collecting all its subsets
- The values of the `name` attributes of `draughting_callout` and of each applicable instance of `annotation_occurrence` subtype in its set of `contents` shall be identical. This is once again to guarantee interoperability with implementations not relying on `draughting_callout`.
- The values of the `name` attributes of the subsequent `geometric_curve_set`, `annotation_fill_area` and `tessellated_geometric_set`, indicating the presented PMI type, must be identical as well.

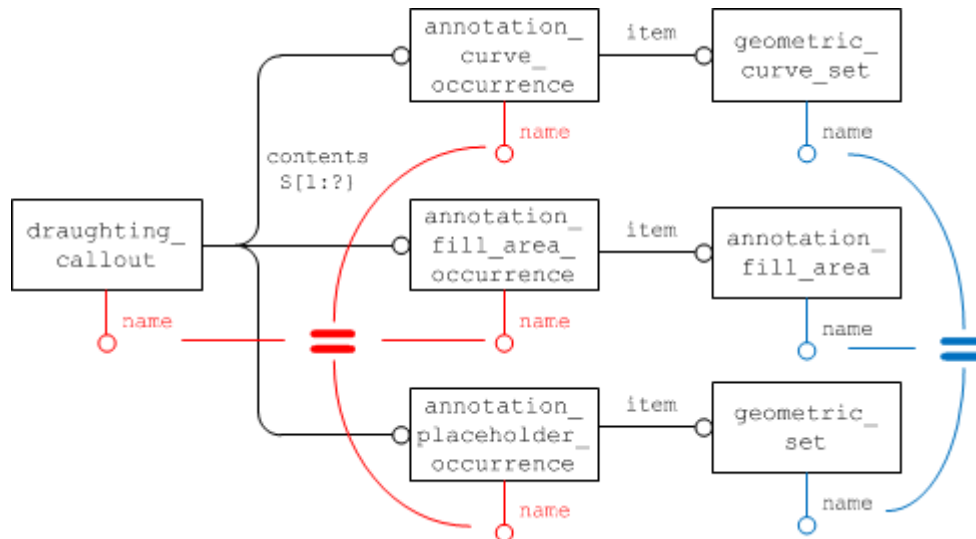


Figure 83: An annotation comprised of different graphic presentation elements

Important Note

While it is technically possible to create a STEP file that contains Polyline Presentation and Tessellated Presentation, even mixed in one annotation, it is recommended that in one STEP file, only one Graphic Presentation approach (Polylines or Tessellated) shall be used.

Postprocessor Recommendations

When importing an annotation comprised of several subsets, this shall be done so that in the target system, the result for the user is again a single element in the model tree.

When importing older files (AP214e3, AP203e2) with Polyline presentation, in which `draughting_callout` was not yet used to collect the subsets of an annotation, the grouping was done using `annotation_occurrence_relationships` which linked the respective instances of `annotation_occurrence` subtypes together. The rules concerning the identical naming for the annotation's "user name" and "presented PMI type" as stated above already applied back then, and can be used as an additional indication for the grouped elements (see [1] for details).

8.3.1 Handling of Annotations with non-coplanar Leader Lines

A special scenario for Graphic Annotation Subsets is the case where an annotation has non-coplanar leader lines. The definitions for creating graphic annotations using Polylines or tessellated elements in sections 8.1 and 8.2 respectively require all elements defined within one `annotation_occurrence` to be in the same plane.

Several CAD systems, however, allow for creating leader lines that are not in that plane. To manage this case properly, the recommendation is to split such an annotation into coplanar subsets, combined into the same draughting callout. Figure 84 illustrates this case.

As a convention to improve interoperability with older implementations, the first `annotation_occurrence` in the set of `contents` of the `draughting_callout` shall always be the main content part of the annotation and be parallel to the underlying `annotation_plane`.

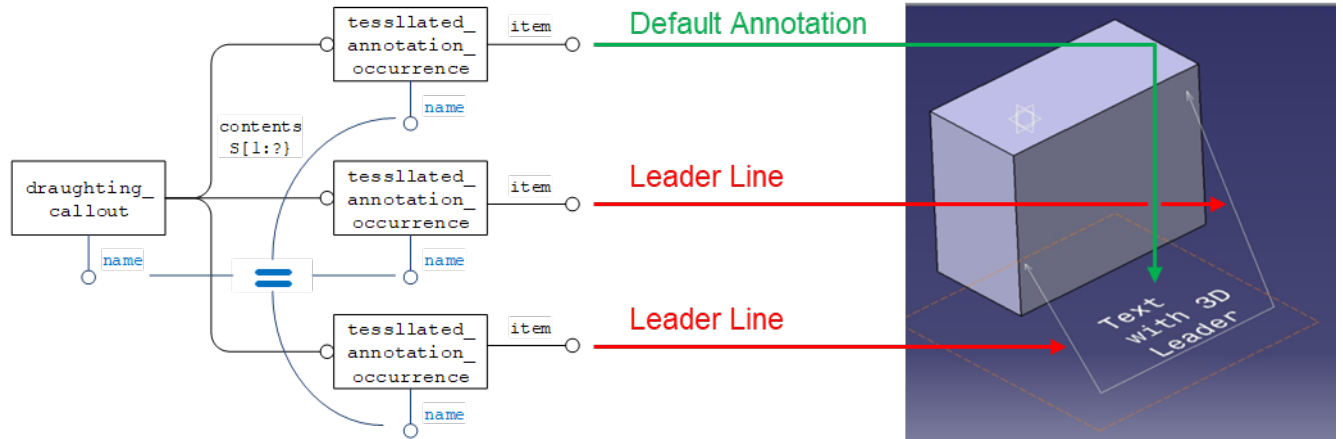


Figure 84: Graphic Annotation Subsets for non-coplanar Annotations

8.4 Indicating the Presented PMI Type

It is recommended that the name of the `geometric_curve_set` (for Basic Polylines), the `annotation_fill_area` (for Filled Polylines) or the `tessllated_geometric_set` (for Tessellated Presentation) to be included in the STEP file is taken from the list given below. These are based on the ANSI/ISO standards NF EN ISO 1101. The intention is to provide the user with a harmonized list of names for display in the feature tree or as a property.

Note that the name of the `geometric_curve_set` / `annotation_fill_area` / `tessllated_geometric_set` is not intended to transport any intelligent (semantic) PMI information.

Tolerance Types	Dimension Types	Datum Types	Other
angularity	linear dimension	datum	note
circular runout	radial dimension	datum target	label
circularity	diameter dimension		surface roughness
coaxiality	angular dimension		weld symbol
concentricity	ordinate dimension		general note ^(*)
cylindricity	curve dimension		
flatness	general dimension		
parallelism			
perpendicularity			
position			
profile of line			
profile of surface			
roundness			
straightness			
symmetry			
total runout			
general tolerance			

Table 18: List of names to be used to indicate the presented PMI type

(*) Note: The value “general note” was added to this table with version 4.0.2 of the document, in order to better support CATIA’s “NOA” functionality.

8.5 Styling the Annotation

Each annotation transformed into graphic presentation form must preserve its graphic characteristics (color, line type and width) and optional attributes (type of annotation, layer). The graphical attribute can be global for the annotation.

The style for the presentation will be defined at the applicable `annotation_occurrence` subtype, which in turn is a subtype of `styled_item`. The styles defined at this level shall be applied to all entities in the annotation.

Basically, all definitions given for the styling of surfaces and curves given in the “Recommended Practices for Model Styling and Organization” apply to graphic presentation as well. This also means that each annotation shall have at least one style assigned, either directly as described here or indirectly via a `draughting_model` it is contained in (see section 9 below).

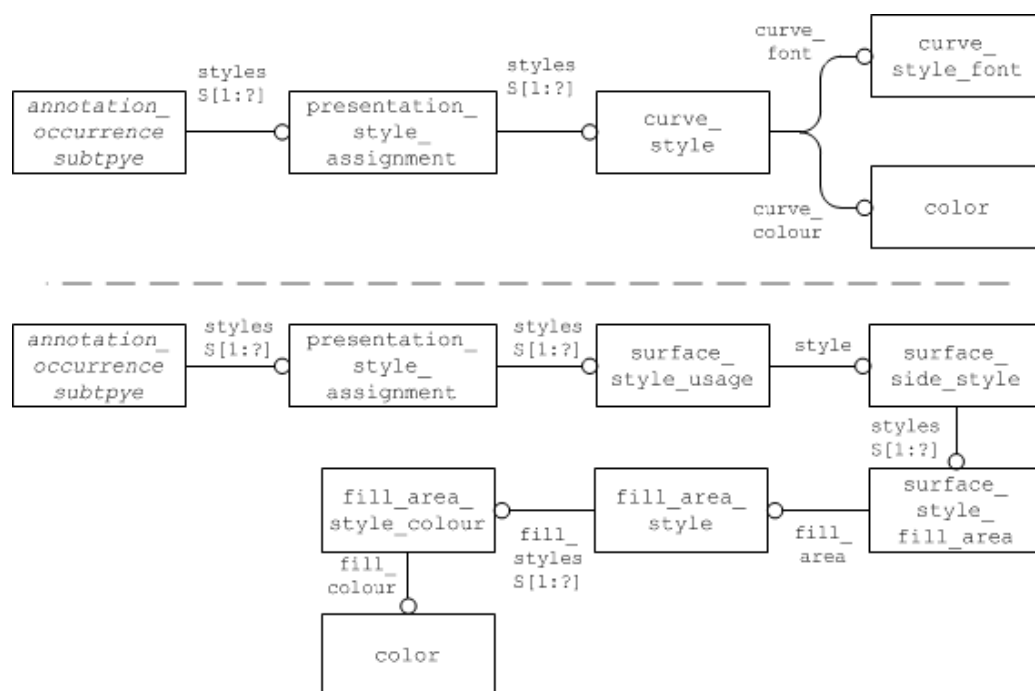


Figure 85: Styling a Graphic Annotation for outline/stroked (top) and filled (bottom) Elements

Note that in the case of Filled Polylines, a `fill_area_style` as well as a `curve_style` may be defined. In order to guarantee interoperability with systems not supporting filled characters, the `curve_style` shall always be given if the presentation is styled.

Note that in the case of Tessellated Presentation, where a `tessellated_annotation_occurrence` may contain tessellated curves as well as tessellated surfaces, it is recommended to provide a `curve_style` as well as a `surface_style_usage` (with `surface_side = .BOTH.`) to apply the intended color. To ensure interoperability, the `curve_style` shall always be given if the annotation is styled, and also applied to any tessellated surfaces within the annotation if no surface style is given.

If certain elements within a graphically presented annotation shall have a different style (e.g., the text shall have a different color than the frame), this will be applied through a complex entity composed of `over_riding_styled_item` and the applicable `annotation_occurrence` subtype.

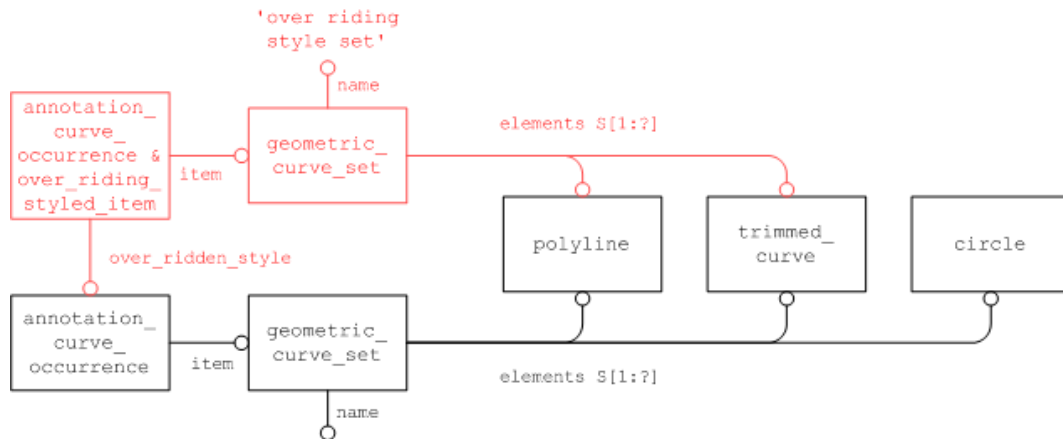


Figure 86: Definition of the overriding style for a Polyline annotation

Figure 86 illustrates this for a Basic Polyline. The concepts described in the “Recommended Practices for Model Styling and Organization” for overriding styles apply here as well. Since the portion of the presentation to be re-styled will in general consist of many constituents, an additional geometric set is needed to collect these. This shall reference the relevant subset of the geometric elements that are contained within the full set of presentation data for this PMI element and have the name “over riding style set” so that it is clear that it is no PMI element by itself (compare section 8.4).

9 Presentation Organization

Regardless of the presentation approach used (Polyline / Tessellated / Semantic), the presented data can be organized in various ways. The main approaches for this are the use of annotation planes, saved views, and the capability to link annotations with the associated geometry they provide information about.

9.1 Annotation Planes

In order to position PMI data and 3D annotations on the screen, users usually work with annotation planes. Each graphic annotation has to be assigned to a reference plane and positioned parallel to that, at a specific position related to the geometry. In some systems, the assignment of an annotation to an annotation plane also has an organizational aspect in addition to positioning the annotation in 3D space.

This position must be preserved after conversion of PMI and 3D annotations. In the case of Polyline Presentation, the three-dimensional `cartesian_points` defining the `polylines` shall be located in a plane that is parallel to the definition plane of the `annotation_plane`. The same applies to the entries in the `coordinates_lists` of a Tessellated Presentation element.

Note that the orientation of the `annotation_plane` should be chosen so that it also indicates the reading direction of the annotations assigned to that plane, i.e., the underlying axis placement shall be defined so, that

- The x axis is the “line that is being written on”, indicating the reading direction
- The y axis points upward from the base to the top of the characters
- The z axis points towards the reader

The same applies for the measuring direction of dimensions given as Graphic Presentation – this should also be taken from the orientation of the `annotation_plane`, if not from the order of related geometric elements.

Note that the definition plane of the `annotation_plane` can be given in two different ways: as an (infinite) `plane`, defined by an axis placement, or as a `planar_box`, defined by an axis placement, a size in x and a size in y (relative to the axis placement). Each preprocessor may choose which definition fits its internal data structure best; both definitions shall be supported on import.

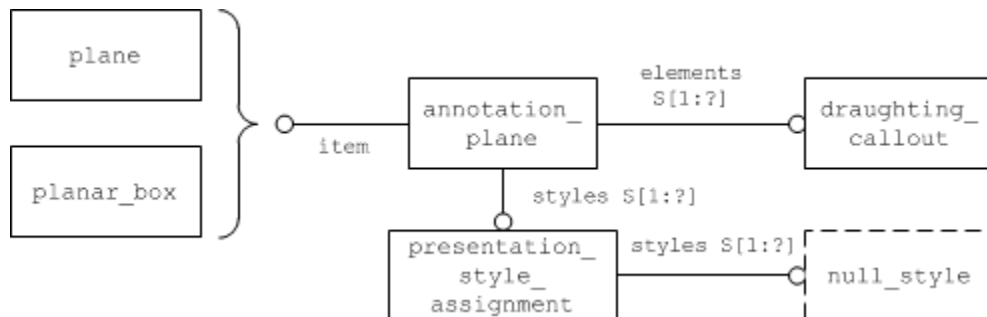


Figure 87: Definition of the view plane

Part 21 Example

```
#571=PLANE('Front View.1',#570);
#572=ANNOTATION_PLANE('Front View.1',(#573),#571, (#580,#613));
#573=PRESENTATION_STYLE_ASSIGNMENT((NULL_STYLE(.NULL.)));
#580=DRAUGHTING_CALLOUT('Simple Datim.1',(#581));
#581=ANNOTATION_CURVE_OCCURRENCE('Simple Datum.1',(#582),#577);
#613=DRAUGHTING_CALLOUT('Circularity.1',(#614));
#614=ANNOTATION_CURVE_OCCURRENCE('Circularity.1',(#615),#611);
```

Note that due to the way annotations are created and handled in many CAD systems, the elements describing an annotation must be in a plane parallel to the plane defining the `annotation_plane`, and not necessarily exactly on that plane.

9.2 Global Draughting Model

In order to correctly include all the annotations in the STEP file structure so that they can be easily found and organized later, they will be collected in one `draughting_model`. Since this `draughting_model` relates to all annotations in the file, it is called the “global” `draughting_model`.

It references all `annotation_planes` in the file, which, in turn, include all `draughting_callouts` in their sets of elements:

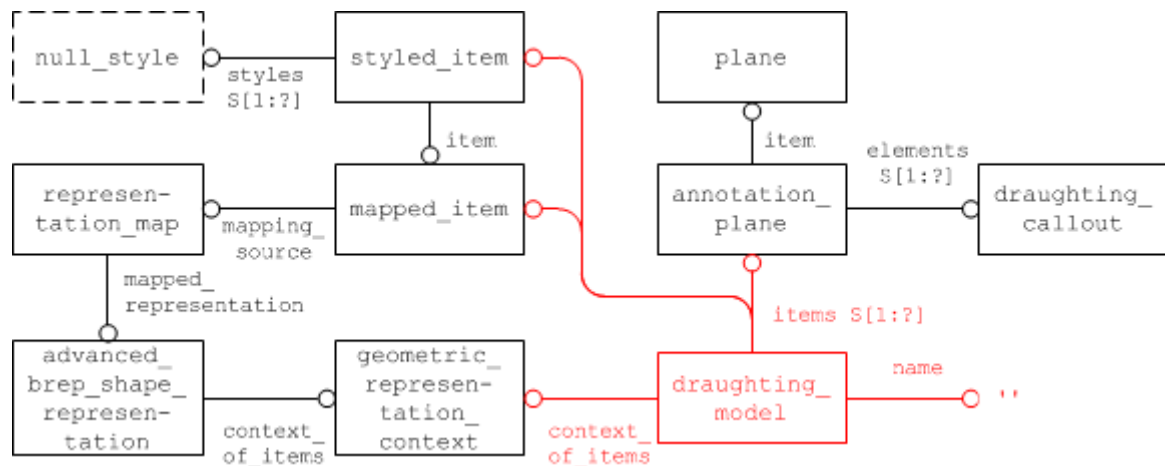


Figure 88: Linking the Annotations together

This global `draughting_model` also contains references to all geometry that shall be displayed when viewing the model. Details about the application and interpretation of styles are described in the “Recommended Practices for Model Styling and Organization”, section 4.1 (“Global Styling Container”), and also in this document, section 9.3.2 (“Saved Views”).

9.3 Linking Annotations with other Elements

Though annotations by themselves already provide a lot of valuable information to the consumer of a model, their usefulness can be vastly enhanced by putting them in context, i.e., linking them with other elements in the file.

Four “targets” are of interest:

1. Linking PMI Presentation with Representation (see section 7.2.5 above)
2. Linking Annotations with Geometry (“cross-highlighting”)
3. Linking Annotations to other Annotations (grouping)
4. Linking Annotations with a Component Instance (Assembly PMI)

9.3.1 Linking Annotations with Geometry (“Cross-Highlighting”)

3D annotations in general and PMI elements in particular are usually linked with geometry, i.e., a specific portion of the geometric shape. For the user, this is typically evident by the fact when a face or edge on the model is selected (highlighted), all associated annotations become highlighted as well, and vice versa. This capability is referred to as “cross-highlighting”.

In order to define the portion of the geometry the annotation relates to, at first the corresponding geometric element must be identified. In the example in Figure 89 below, this is an `advanced_face` linked through some chain of elements to the `advanced_brep_shape_representation` defining the geometric shape. Next, a `shape_aspect` will be defined so that the face can be referred to. The link between the `shape_aspect` and the `advanced_face` is created via an entity of type `geometric_item_specific_usage`:

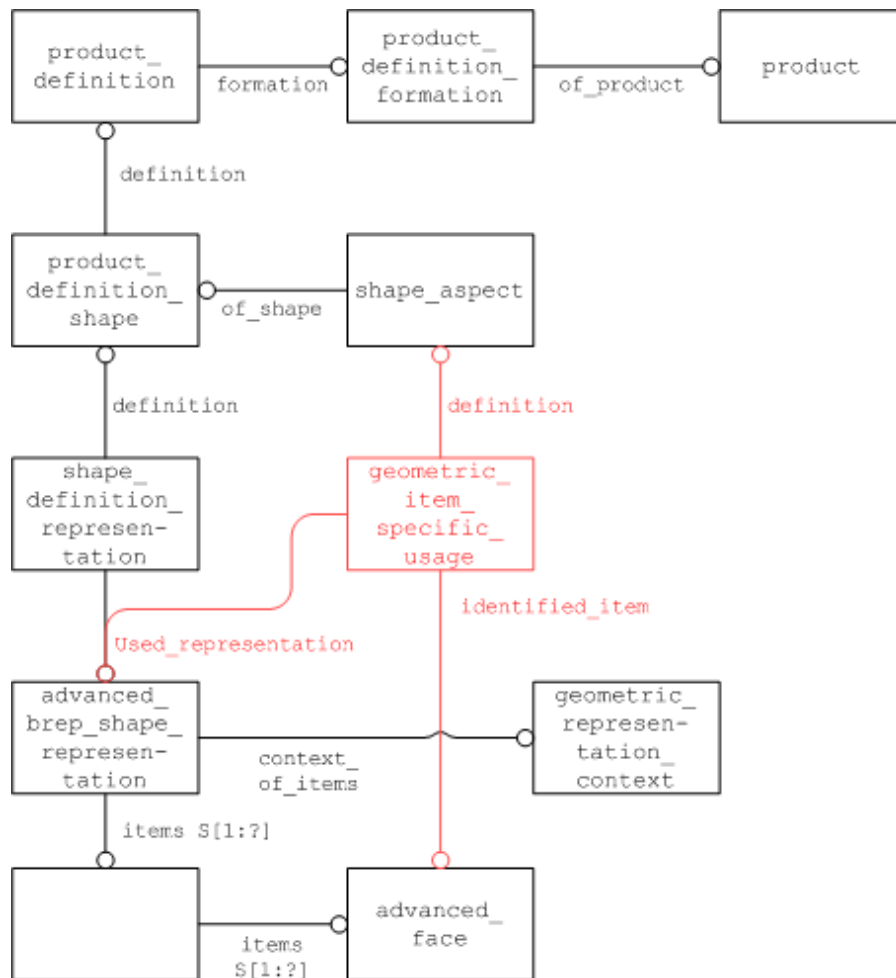


Figure 89: Identification of the relevant portion of Geometry

Part 21 Example

```
#15=PRODUCT_DEFINITION_SHAPE('', '#14');
#21=(GEOMETRIC_REPRESENTATION_CONTEXT(3)GLOBAL_UNCERTAINTY_ASSIGNED_CONTEXT((#20))GLOBAL_UNIT_ASSIGNED_CONTEXT((#16,#17,#19))REPRESENTATION_CONTEXT('', ''));
#24=ADVANCED_BREP_SHAPE_REPRESENTATION('NONE', (#26), #21);
#25=SHAPE_DEFINITION_REPRESENTATION(#15, #24);
#26=MANIFOLD_SOLID_BREP('PartBody', #35);
#35=CLOSED_SHELL('Closed Shell', (#75, #124, #136, #180, #211, #266, #290, #350, #410, #432, #439, #461, #468, #492, #509, #526, #543));
#350=ADVANCED_FACE('PartBody', (#313, #331, #349), #295, .T.);
#1180=SHAPE_ASPECT('', 'GDT', #15, .F.);
#1181=GEOMETRIC_ITEM_SPECIFIC_USAGE('', 'GDT', #1180, #24, #350);
```

The next step is to link the draughting_callout for the annotation to the identified geometry. This is done using a draughting_model_item_association, which references the “global” draughting_model, the identified item and the shape_aspect that relates to the portion of the geometry that the annotation relates to, as defined above.

Note that there might be an n:m relationship between `draughting_callout` and `advanced_face`, as one annotation might cross-highlight more than one face, and vice versa there might be more than one annotation linked to the same face. The role of the common `shape_aspect` is merely to allow a user in the receiving system to see the same cross-highlighting available in the source system.

Figure 90 below illustrates the complete structure to identify the relevant portion of geometry and link the annotation to it. The entire path for the link is highlighted:

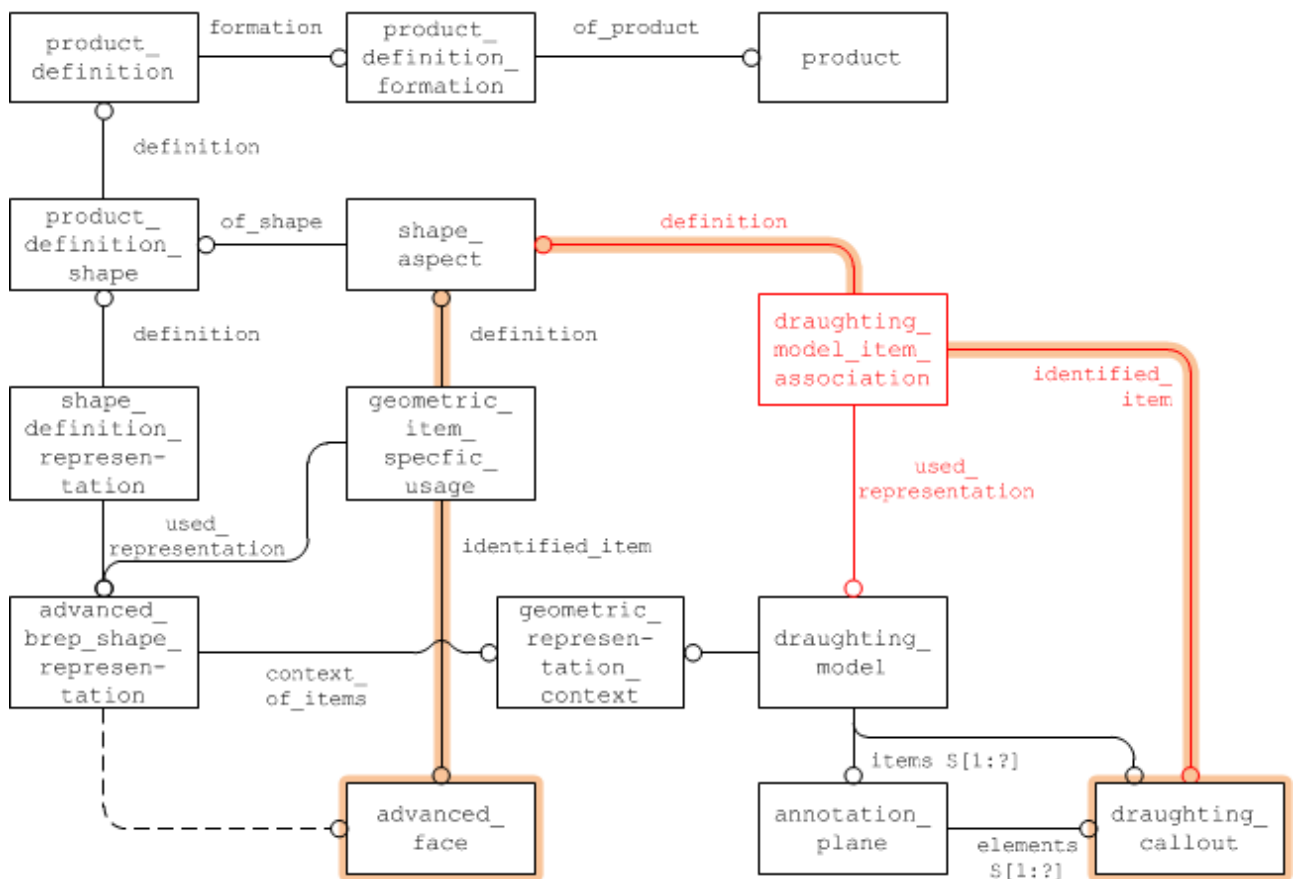


Figure 90: Associating the Annotation with the Geometry

Part 21 Example

```
#566=DRAUGHTING_MODEL('', (#572, #887), #21);
#572=ANNOTATION_PLANE('Front View.1', (#573), #571, (#580, #613));
#580=DRAUGHTING_CALLOUT('Simple Datum.1', (#581));
#581=ANNOTATION_CURVE_OCCURRENCE('Simple Datum.1', (#582), #577);
#1180=SHAPE_ASPECT('', 'GDT', #15, .F.);
#1182=DRAUGHTING_MODEL_ITEM_ASSOCIATION('', '', #1180, #566, #580);
```

9.3.2 Linking Annotation with entire Part (“Cross-Highlighting”)

The basic concept is the same as described above for linking an annotation to its target geometry but supports the use case where a PMI element applies to the entire part. This corresponds to the concept of “all-over” on the semantic representation level, as described in section 6.3.

In this case, the draughting_model_item_association will link the draughting_callout directly to the product_definition_shape instead of a shape_aspect:

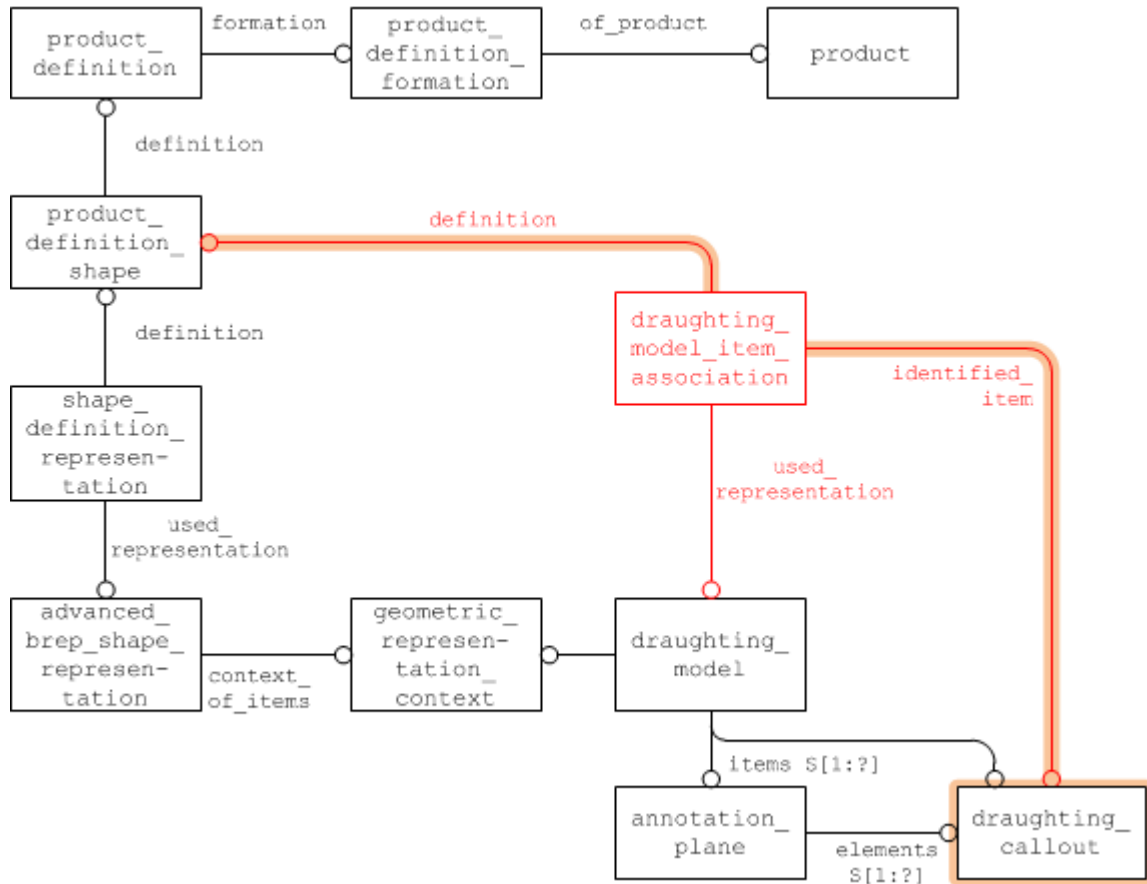


Figure 91: Associating the Annotation with the entire Part

Part 21 Example

```

#15=PRODUCT_DEFINITION_SHAPE('', '#14');
#21=(GEOMETRIC_REPRESENTATION_CONTEXT(3)GLOBAL_UNCERTAINTY_ASSIGNED_CONTEXT((#20))GLOBAL_UNIT_ASSIGNED_CONTEXT((#16, #17, #19))REPRESENTATION_CONTEXT('', ''));
#24=ADVANCED_BREP_SHAPE_REPRESENTATION('NONE', (#26), #21);
#25=SHAPE_DEFINITION_REPRESENTATION(#15, #24);
#566=DRAUGHTING_MODEL('', (#572, #580), #21);
#572=ANNOTATION_PLANE('Front View.1', (#573), #571, (#580, #613));
#580=DRAUGHTING_CALLOUT('Simple Datum.1', (#581));
#1185=DRAUGHTING_MODEL_ITEM_ASSOCIATION('', '#15, #566, #580);
    
```

9.3.3 Linking Annotations to other Annotations

9.3.3.1 Grouping using draughting_callout_relationship

There are scenarios where it is useful to put annotations in a relationship with each other. For instance, for the “cross-highlighting” capability described above it shall be possible to link an annotation presenting a datum reference to the annotation presenting the datum.

Since, as mentioned several times before, `draughting_callout` is the “anchor” entity for any annotation regardless of its implementation approach, this linking is done using `draughting_callout_relationship`.

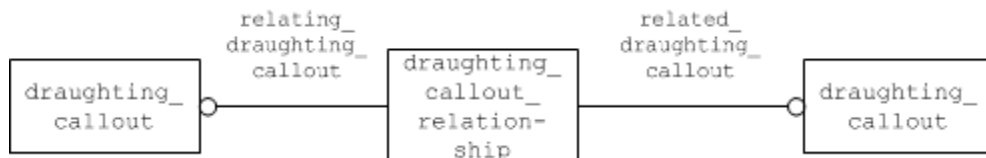


Figure 92: Linking Annotations to other Annotations

Note that the link established by `draughting_callout_relationship` carries no other (semantic) meaning besides the fact that the two annotations are related to each other. So, with cross-highlighting, when one of the two annotations is selected, the other shall be highlighted as well.

The relationship shall have no further effect, e.g., on the visibility of the linked annotations in views.

9.3.3.2 Grouping using Annotation Planes

As described in section 9.1 above, each graphic presentation annotation is bound to one `annotation_plane`. The primary objective of this relationship is to provide information about location and orientation of the annotation. Some CAX also interpret annotation entities which are defined on the same `annotation_plane` as a means of grouping the data.

As a result, the convention is that, if an `annotation_plane` is contained in the set of items of a `draughting_model`, all elements contained in the set of elements of the `annotation_plane` are also contained (visible) in the `draughting_model`.

The use of `annotation_plane` to group `draughting_callouts` is shown in Figure 93 below. This is appropriate for full model definition (see 9.2) or saved view definition (see 9.4.2)

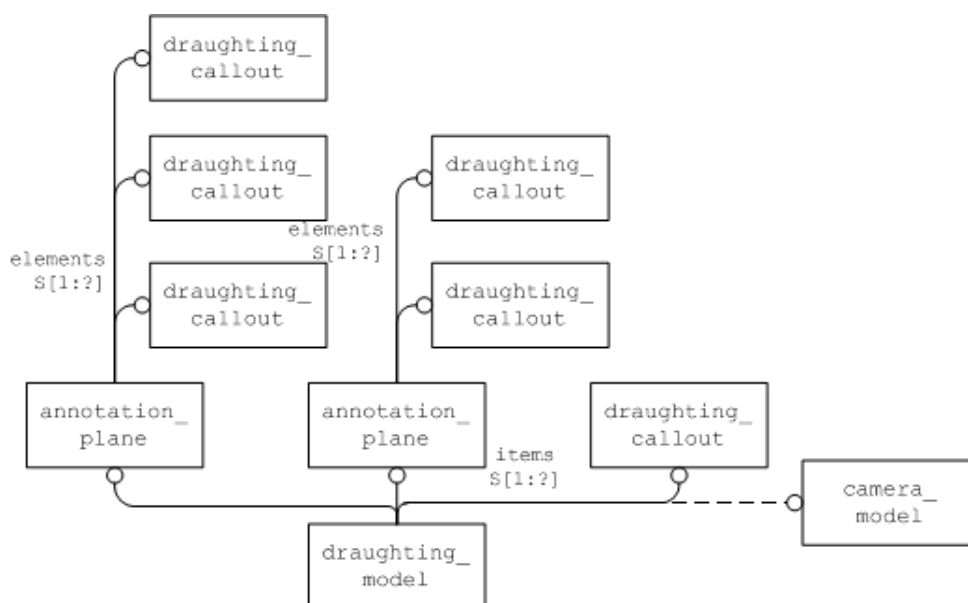


Figure 93: The use of annotation_plane to group some of the draughting_callout

9.3.4 Linking Annotations with Component Instances (Assembly PMI)

All PMI elements and the ways they are applied to the model respectively as described in this document is based on single-piece parts. It is clear, however, that many of the concepts can be applied in an assembly context as well. A dimension can be defined not only between two faces of a single part, but in the same way between two faces of two different parts – or part instances – to define their exact placement in an assembly.

This poses an additional challenge in the implementation, since specifying the path from the relative root node that defines the context for the assembly PMI down to the target component instance has to be added to the relationship between annotation and geometric element.

This is done using the `component_path_shape_aspect` (CPSA) entity. It is a subtype of `shape_aspect` with two additional attributes:

- `component_shape_aspect` points to the `shape_aspect` which identifies the target geometry on the component part.
- `location` points to an instance of `multi_level_reference_designator` (MLRD). This is a subtype of `assembly_component_usage` which identifies the path from the relative root node down to the target component instance by listing all intermediate instances of `next_assembly_usage_occurrence` (NAUO).

There are certain rules on how the two entities, CPSA and MLRD, work together.

- MLRD's root node is defined as the `product_definition` referenced as `relating_product_definition` by the first NAUO in the `MLRD.location` list.
- MLRD's leaf node is defined as the `product_definition` referenced as `related_product_definition` by the last NAUO in the `MLRD.location` list.
- The CPSA itself must be defined in the context of the root node.
- The `shape_aspect` referenced by `CPSA.component_shape_aspect` must be defined in the context of the leaf node.

This makes it possible to define a dimension between two occurrences of the same face in two different instances of the same part, as illustrated by Figure 94:

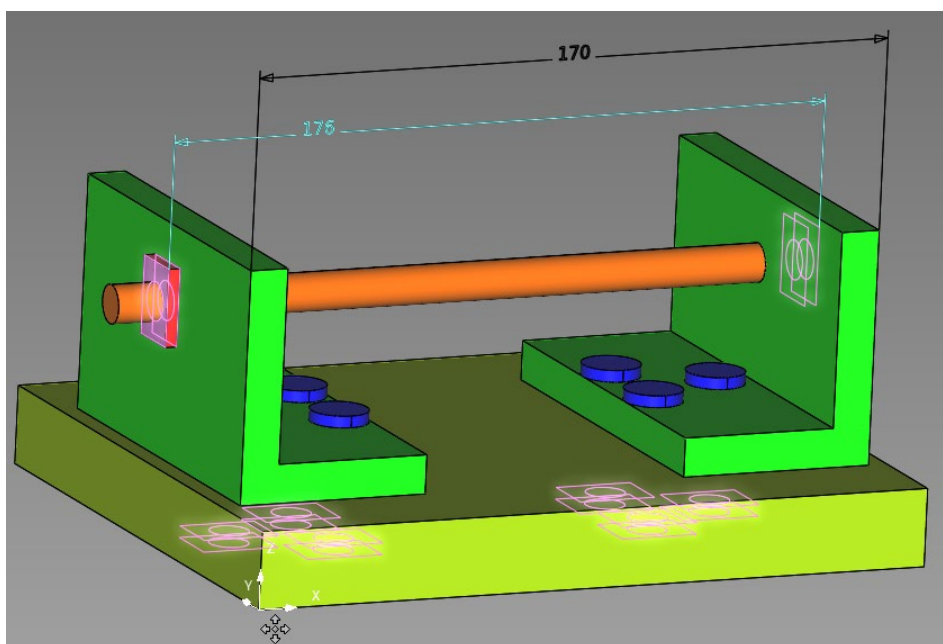


Figure 94: Assembly PMI Illustration, based on AS1

The structure shown in Figure 95 below is also based on the AS1 example and illustrates how to link an annotation to its target geometry in an assembly. When comparing this with the single-part scenario described above in section 9.3.1, Figure 90, it becomes clear how *CPSA* is inserted between the *draughting_model_item_association* and the *shape_aspect* defined at part level. It also shows how *MLRD* defines the unambiguous path from root to leaf.

Note that Figure 95 is a simplified diagram that does not show all involved entity instances. For better readability, only the most relevant entities and attributes are shown.

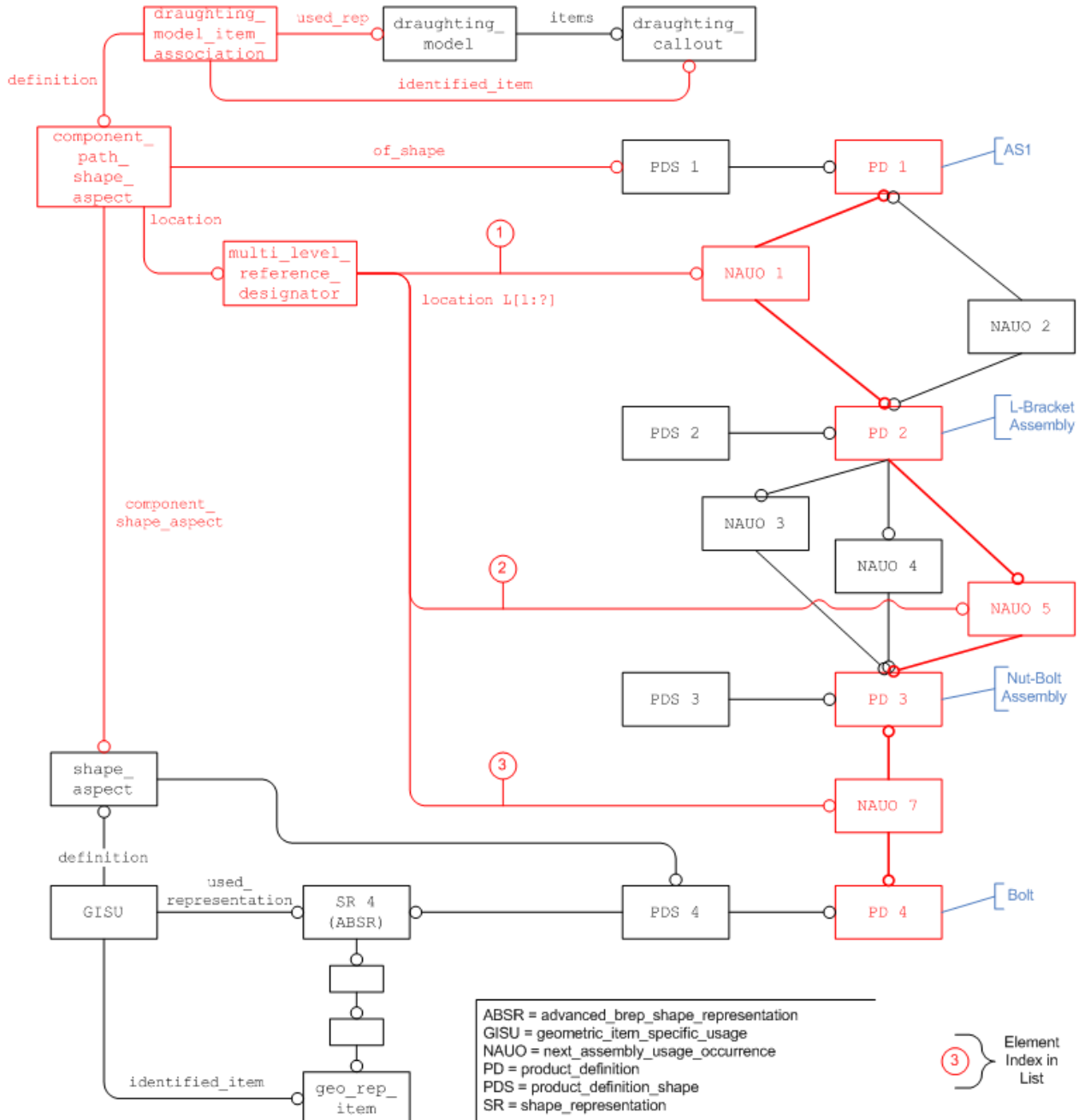


Figure 95: Linking annotation to a component instance in an assembly

The approach as described here covers the scenario where all information (assembly structure, geometry, PMI) is contained in a single STEP file. The two new entity types, *CPSA* and *MLRD*, have been designed specifically to support the scenario of External Element References as well, where this information is distributed across several files. This will be covered in detail in a future version of the CAX-IF Recommended Practices for External References.

Part 21 Example

```
/* Root Node: AS1 */
#41=PRODUCT('as1','as1',' ',(#11));
#46=PRODUCT_DEFINITION_FORMATION_WITH_SPECIFIED_SOURCE(' ', ' ', #41, .NOT_KNOWN.);
#51=PRODUCT_DEFINITION('design',' ',#46,#16);
#111=PRODUCT_DEFINITION_SHAPE(' ', ' ',#51);
/* L-Bracket Assembly */
#831=PRODUCT('l-bracket-assembly','l-bracket-assembly',' ',(#11));
#836=PRODUCT_DEFINITION_FORMATION_WITH_SPECIFIED_SOURCE(' ', ' ', #831, .NOT_KNOWN.);
#841=PRODUCT_DEFINITION('design',' ',#836,#16);
/* Leaf Node: L-Bracket */
#1486=PRODUCT('L-BRACKET','L-BRACKET',' ',(#11));
#1491=PRODUCT_DEFINITION_FORMATION_WITH_SPECIFIED_SOURCE(' ', ' ', #1486, .NOT_KNOWN.);
#1496=PRODUCT_DEFINITION('design',' ',#1491,#16);
/* Shape Aspect for Face on L-Bracket */
#1501=SHAPE_ASPECT(' ', $, #1557, .T.);
#1557=PRODUCT_DEFINITION_SHAPE(' ', ' ',#1496);
#1592=GEOMETRIC_ITEM_SPECIFIC_USAGE(' ', $, #1501, #1612, #4362);
#1612=ADVANCED_BREP_SHAPE_REPRESENTATION('L-BRACKET', (#4012), #92);
#1617=SHAPE_DEFINITION_REPRESENTATION(#1557, #1612);
/* NAUO for L-Bracket in L-Bracket Assembly */
#1621=NEXT_ASSEMBLY_USAGE_OCCURRENCE('L-BRACKET_1', ' ', 'L-BRACKET_1', #841, #1496, ' ');
/* NAUO for L-Bracket Assembly in AS1 */
#1771=NEXT_ASSEMBLY_USAGE_OCCURRENCE('l-bracket-assembly_1', ' ', 'l-bracket-assembly_1', #51, #841, ' ');
/* Linking Annotation to Face on Instance of L-Bracket in AS1 */
#2366=(CHARACTERIZED_OBJECT(*,*)CHARACTERIZED_REPRESENTATION()DRAUGHTING_MODEL()REPRESENTATION(' ', (#3266), #2016));
#3231=ANNOTATION_CURVE_OCCURRENCE('Dimension.1', (#3226), #3221);
#3271=MULTI_LEVEL_REFERENCE_DESIGNATOR('Dimension.1', ' ', 'Dimension.1', *, *, ' ', (#1771, #1621));
#3277=DRAUGHTING_MODEL_ITEM_ASSOCIATION('Dimension.1', $, #3281, #2366, #3231);
#3281=COMPONENT_PATH_SHAPE_ASPECT('Dimension.1', $, #111, .T., #3271, #1501);
/* Face on L-Bracket */
#4362=ADVANCED_FACE(' ', (#267, #357), #117, .T.);
```

9.4 Saved Views

9.4.1 Definition of Terms

A “saved view” in the context of PMI presentation in STEP as described in this document complies with the following definition taken from ISO 16792, section 5.6:

Saved Views

Saved views of a design model may be defined to facilitate presentation of the model and its annotation. A saved view shall have an identifier, be retrievable on demand, contain a model coordinate system that denotes the direction of the view relative to the model and may contain one or more of the annotation plane(s), a selected set of annotation, or a selected set of geometry.

The following list of equivalent terms might help in technical discussions:

- ISO 16792, ASME Y14.41-2003 - saved view
- CATIA V5/V6 - capture
- NX - work view
- Creo (Pro/Engineer) - combined state

Note: The terms are not 100% equivalent with the Saved View definition. Not all of the capabilities listed above require the definition of a viewing orientation, which is necessary for the full definition of a Saved View. The terms are given here for a better general understanding. 0 provides more details on how the corresponding CAD system mechanisms are translated to a Saved View in STEP.

9.4.2 Basic Saved View definition in STEP

From the model structure point of view, the definition of a Saved View can be broken down into three major characteristics:

- **what** is being displayed (geometry and annotations)
- **from where** it is being seen (model orientation)
- **an identifier for the unique combination** of the two.

For each of these, there is a key entity in STEP, starting at which the corresponding information can be retrieved:

- the **draughting_model** will define what is being displayed,
- the **camera_model** will define from where it is being seen,
- the **model_geometric_view** will define the combination of the two and carry the identifier.

The base entity to start the definition of a Saved View in STEP is the `draughting_model`. It will define the contents to be displayed. The `draughting_model` can collect `draughting_callout` entities in its set of items. Each of these callouts provides the presentation data for a dimension, geometric tolerance, or other item of annotation, and does it independently of the implementation approach taken for the annotation (Polyline, Tessellated, or Placeholder).

The `draughting_models` (the global `draughting_model` as well as those defining the scope of visible geometry and annotations for a Saved View) will share the same `geometric_representation_context` as the `shape_representations` defined for the part. See section 0 below for how these `draughting_models` are related to each other.

A `draughting_model` can also exist as a group of displayed annotations and geometry without an associated `camera_model`, which equals for instance the “capture” concept in CATIA V5. A

`draughting_model` may also have several `camera_models` associated to it, which will display the same set of elements from different positions in 3D space.

It is recommended that name attribute of the `draughting_model` should be used to convey an identifier for the selected subset of elements. In its set of items, it will reference the geometric and annotation elements to be displayed. One or more instances of `camera_model` will be included in its set of items, which will define the viewing point and the viewing orientation. Each camera may also have a name.

The name of the Saved View is stored in `model_geometric_view.name`. This entity type was introduced with AP242 Edition 2 and is a subtype of `characterized_item_within_representation`, thus identifying one specific `representation_item` in the context of a representation it is contained in. There also is a subtype of this entity which allows for defining one of the Saved Views as the default view to be activated when loading the model; see section 9.4.2.7.

The definition of Saved Views in general is not mandatory in most CAD systems. There also may be annotations that are not included in any Saved View, but they still are correctly included in the STEP file structure through the global `draughting_model`.

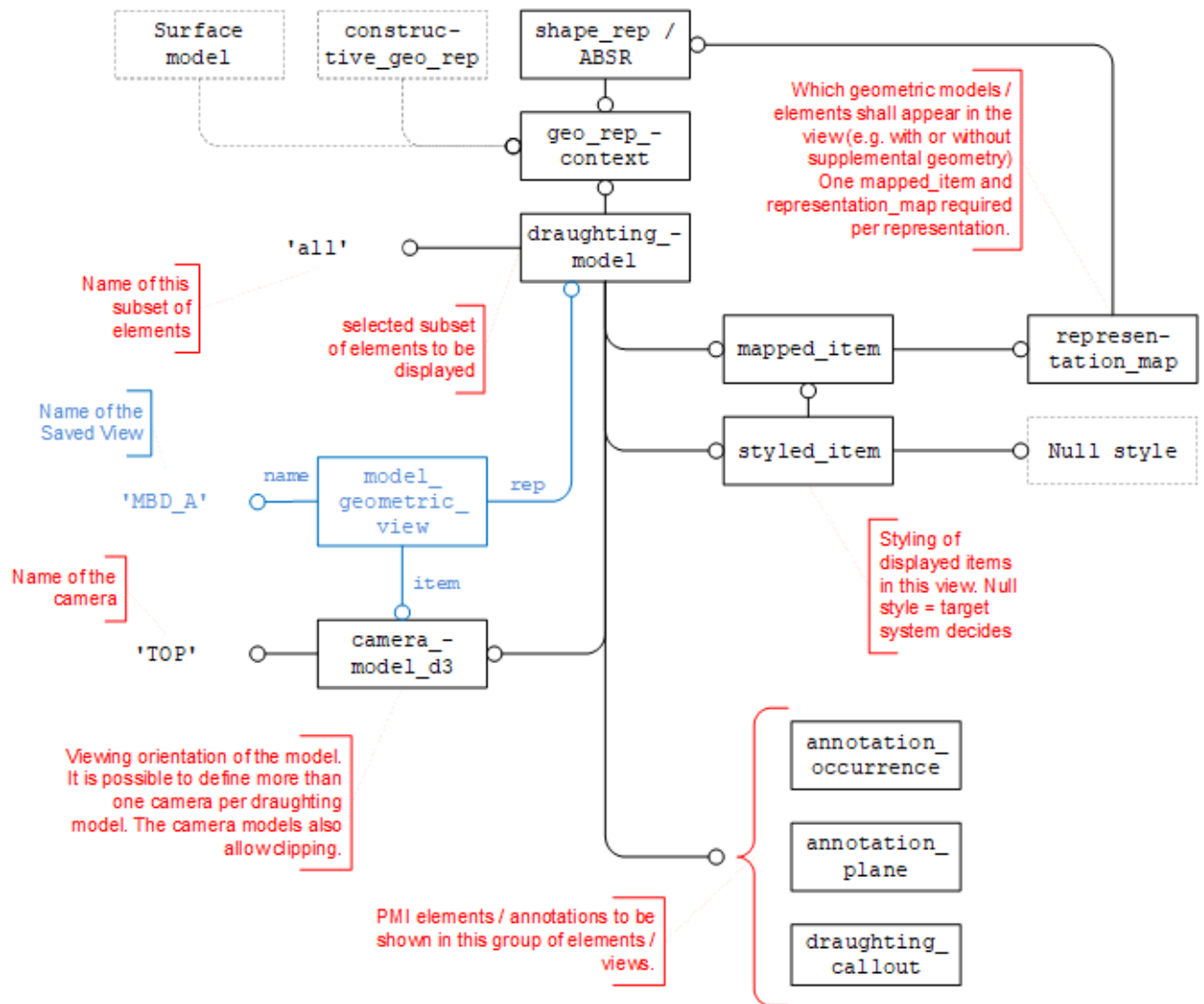


Figure 96: Defining a Saved View with `model_geometric_view`

Compatibility Note concerning the Saved View Name

Before version 4.0.12 of this document, it was recommended to store the name of the Saved View in `camera_model_d3.name`. This agreement was made before `model_geometric_view` was introduced, since putting the name on the camera worked better for most CAD systems. For these “content-led” system (e.g., CATIA), the content to be shown is the leading part of information, and it can then be viewed from different angles.

There are, however, also “camera-led” CAD systems (e.g., Creo), for which the viewpoint is the leading piece of information, and different contents can be viewed from there, so the previous agreement is ambiguous.

The following recommendations are given for reading and writing the Saved View name:

On import:

- First, look for the Saved View Name in `model_geometric_view.name`.
- If the name is empty, or if the entity does not exist for this Saved View, look in `camera_model_d3.name` (previous recommendation).
- Into content-led systems:
 - If several `camera_model_d3` instances with the same name are encountered in a STEP file, append the names of their respective parent `draughting_model` to create unique Saved View names.
 - If this still doesn't resolve all naming conflicts, add an index letter ('_A', '_B'...) where necessary.
- Into camera-led systems:
 - If several `camera_model_d3` instances with the same name and same definition (position, orientation, scaling) are encountered in a STEP file, combine them into one camera. If they have identical names but different definitions, follow the steps listed above to create unique camera names.
 - Take the name of the Saved View from `draughting_model.name` instead.

On export:

From content-led systems:

1. For each collection of elements (geometry and annotations) to be displayed, create a `draughting_model` with a name representing this collection. The name shall not be empty.
2. For each Saved View, add a viewpoint, i.e., an instance of `camera_model_d3`, to the respective content (`draughting_model`), with the name of the Saved View stored in the `camera_model_d3.name` attribute (previous recommendation, for compatibility with existing implementations).
3. Create an instance of `model_geometric_view` connecting the combination of `draughting_model` and `camera_model_d3` defining the Saved View and store the name of the Saved View in its `name` attribute as well.

From camera-led systems:

1. Duplicate cameras where necessary, so that each instance of `camera_model_d3` is contained in exactly one `draughting_model`. `camera_model_d3.name` carries the name of the camera. This means that there might be several camera instances with the same name and same definition (position, orientation, scaling) in the STEP file.
2. `draughting_model.name` identifies the displayed content (e.g., name of the combined state in Creo)

3. Create an instance of `model_geometric_view` connecting the combination of `draughting_model` and `camera_model_d3` defining the Saved View and store the name of the Saved View in its `name` attribute as well.

This will not resolve all issues, as some possible conflicts remain. It is not possible to unambiguously say where the actual view name is stored in all cases. The CAX-IF and AP242 PMI teams however agreed that this approach promises the highest degree of compatibility.

9.4.2.1 Definition of the Part Geometry to be displayed

In a Saved View – or a selected subset of the model in general – all or some of the geometric contents will be displayed. There may be more than one geometric representation describing the part. An often-seen combination is to have an `advanced_brep_shape_representation` (ABSR) for the solid part shape plus additional wireframe or surface representations, all sharing the same geometric context. Hence, it needs to be identified which of these representations shall be visible in the `draughting_model`, which is done via a `mapped_item` and a `representation_map` (see Figure 96) for each representation of interest. The `axis2_placement_3ds` referenced as `mapping_source` and `mapping_origin` shall define a unit transformation.

This allows defining a Saved View which for instance, only shows the solid part shape, but not any of the independent faces or curves, by mapping only the ABSR into the `draughting_model`.

As stated in Part 46, only styled items shall be displayed. Hence, in order to convey the information that the target system shall use either the styling defined for the part itself or use its own default styles if none are given in the STEP file, a NULL style shall be assigned to the `mapped_item`.

Note that as stated in 9.1, if the toolkit used in the STEP processor does not allow the creation of a NULL style, a style with an empty color should be created instead. By using this style, it is also possible to style the entire part differently in this specific view.

Also see the “Recommended Practices for Model Styling and Organization” for more information about the usage and interpretation of styles.

9.4.2.2 Definition of the Supplemental Geometry to be displayed

In general, visibility of Supplemental Geometry in a Saved view is managed in the same way as for part geometry, by mapping the `constructive_geometry_representation` (CGR) into the `draughting_model` as shown in Figure 96.

A complete model often contains many supplemental geometry elements of which only some shall be visible in the Saved View. However, some CAD systems rely on all supplemental geometry elements being gathered in a single dedicated container.

The recommended approach to support both requirements is to have a ‘global’ CGR that collects all supplemental geometry elements, as well as individual CGRs, where each CGR represents the supplemental geometry elements that shall be visible in a specific saved view. This CGR can then be mapped into the respective `draughting_model`.

Note that it is possible to include a supplemental geometry element in the set of items of more than one CGR in case it shall be visible in more than one Saved View.

Note that when relating supplemental geometry elements to `draughting_callouts` or `annotation_occurrences` to support cross-highlighting (see Figure 90), the `shape_aspect.product_definitional` attribute has to be set to `FALSE`.

9.4.2.3 Changing the Appearance of Assembly Components in a Saved View

The section above described the scenario for single piece parts, as well as for assemblies in case the entire assembly shall be displayed. Following the usual conventions in STEP, in case the

shape_representation mapped into the draughting_model in Figure 96 belongs to an assembly, all subsequent shape_representations for sub-assemblies and component parts are mapped into the draughting_model (i.e., displayed) as well.

For larger assemblies, it might make sense to display only some components in a particular Saved View, or to change the appearance of some components. For instance, in a gear box assembly, one might want to hide the casing and display some gears translucent to provide a clearer view on the parts in focus, while still providing context. In addition, one of the gears could be displayed in a different color than usual in this view to draw special attention to it.

This is realized using the “Assembly Component Instance Styling” approach described in the Recommended Practices for Model Styling and Organization, section 5.

In order to change the appearance of particular assembly component in a Saved View, as the first step map the entire assembly into the Saved View as shown in Figure 96. Then, for each component that shall be hidden or styled in a different way from its original definition, one instance of context_dependent_over_riding_styled_item (CDORSI) is created and set up as follows:

Attribute	Population
name	(no recommendation)
styles	Null style (for invisibility), or new style in context of this Saved View (different color and/or translucency) – see Recommended Practices for Model Styling and Organization for details.
item	The component or element to be displayed differently. This can be an entire (shape_)representation, or a particular representation_item.
over_ridden_style	The styled_item shown in Figure 96 and Figure 97
style_context	The path along the geometric assembly structure. Note that it does not call out the respective representations, but the relationships between them. It starts with the mapped_item mapping the top-level shape_representation into the draughting_model, and then walks down the representation_relationships to the target component in questions.

Table 19: CDORSI Attribute Population

Note that the CDORSI has to be in the set of items of the draughting_model for this particular Saved View. If it is included in the global draughting_model, the defined styles will affect all Saved Views!

Note this implementation currently violates CDORSI.WR1 which gives the following restriction: “There shall be only one representation_item or all style_contexts are mapped_items or all style_contexts are representation_relationships”. This is a known issue.

Part 21 Example

```
#1289=(GEOMETRIC_REPRESENTATION_CONTEXT(3)GLOBAL_UNIT_ASSIGNED_CONTEXT((#1308,#1725,#1977))REPRESENTATION_CONTEXT('MASTER','3D'));
#1939=(REPRESENTATION_RELATIONSHIP('#1149','l-bracket-assembly      :
nut-bolt-assembly',#1971,#1972)
```

```
REPRESENTATION_RELATIONSHIP_WITH_TRANSFORMATION(#2346)
SHAPE_REPRESENTATION_RELATIONSHIP());
#1947=(REPRESENTATION_RELATIONSHIP('#2000','MASTER : l-bracket-
assembly',#1972,#1976)
REPRESENTATION_RELATIONSHIP_WITH_TRANSFORMATION(#2354)
SHAPE_REPRESENTATION_RELATIONSHIP());
#1971=SHAPE_REPRESENTATION('#1106',(#99,#89,#98),#1286);
#1972=SHAPE_REPRESENTATION('#1147',(#103,#79,#100,#101,#102),#1287)
;
#1976=SHAPE_REPRESENTATION('#1997',(#61,#104,#124,#125,#135,#2182),
#1289);
#2180=DRAUGHTING_MODEL('Styled Model 1',(#2184,#2181,#2186,#2189,
#2192,#2195,#2211),#1289);
#2181=MAPPED_ITEM('',#2342,#2182);
#2182=AXIS2_PLACEMENT_3D('',#2183,$,$);
#2183=CARTESIAN_POINT('',(0.0,0.0,0.0));
#2184=STYLED_ITEM('',(#2185),#2181);
#2185=PRESENTATION_STYLE_ASSIGNMENT(NULL_STYLE(.NULL.));
#2189=CONTEXT_DEPENDENT_OVER_RIDING_STYLED_ITEM('',(#2190),#1971,
#2184,(#2181,#1947,#1939));
#2190=PRESENTATION_STYLE_ASSIGNMENT(NULL_STYLE(.NULL.));
#2191=INVISIBILITY((#2189));
#2195=CAMERA_MODEL_D3('Saved View 1',#2196,#2200);
```

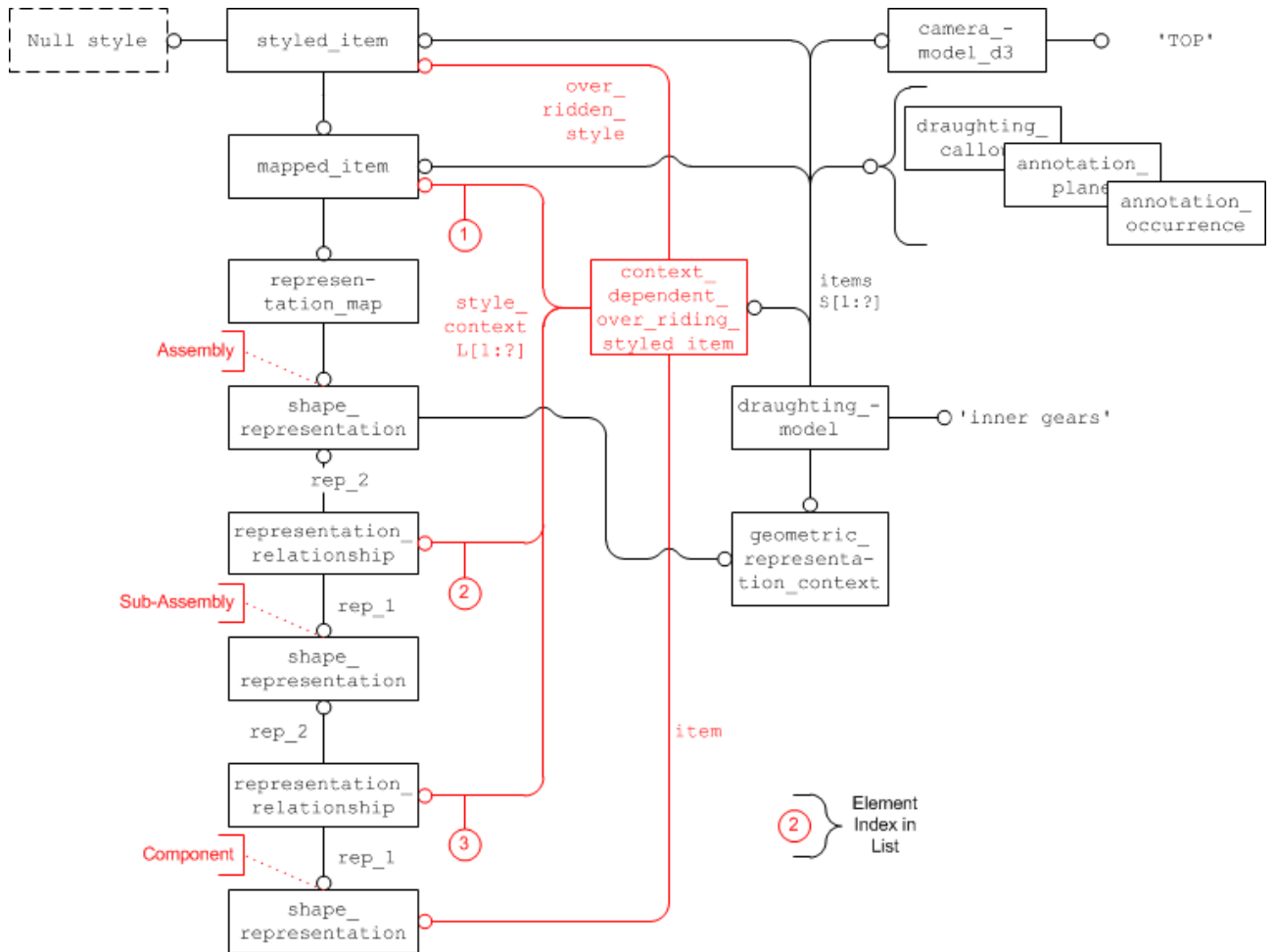


Figure 97: Changing the Display Style for one Assembly Component in a Saved View

9.4.2.4 Changing the Appearance of Components in a Saved View for a Nested Assembly

This capability combines the approaches for Assembly PMI (see section 9.3.4), changing the appearance of assembly components in a Saved View (see section 9.4.2.3) and External Element References (see “External Element References Document (Rev. 3.2, dated Oct. 12, 2012)”, available in the CAx-IF member area under “Information on Round 31J of Testing”).

The challenge is in the fact that while the Saved View shall be defined in the context of higher-level assembly node, the `shape_representation` for the component part which shall be hidden in the view (see bottom end of Figure 97) is located in a different file.

The original EER approach was designed to work only on the product assembly. It introduced `product_definition_reference` (PDR) to represent parts defined in external files, linked them together using instances of `next_assembly_usage_occurrence` (NAUO), and finally defined the path from the relative root node down to the target leaf node using `multi_level_reference_designator` (MLRD). The actual assembly structure would still be defined in the individual constituent files of the assembly; the ‘parallel’ structure built in the relative root node file solely serves the purpose of providing ‘navigation instructions’.

AP242 Edition 2 DIS extends this capability to the geometric assembly, following the same principles. The new entity type `representation_reference` and its subtype `shape_representation_reference` is the counterpart for PDR. These will be linked together using instances of `representation_relationship` (SRR) – note that no transformations are needed here, as again, this structure serves navigational purposed only. Repeating the transformations would introduce redundancy, and hence the risk for inconsistency. The role of MLRD will be taken over by CDORSI, as shown in Figure 97.

The catch here is that the `shape_representation` for the component part as well as any intermediate assembly nodes will be in external files, hence they will be represented by instances of SRR in the root file with the Saved View definition. For CDORSI to be able to include SRR in its `style_context` list, an extension of the `styled_item_target` SELECT type was required.

The diagram included below extends Figure 97 for the nested scenario. It shows how the ‘navigation structure’ for the geometric assembly is included in the root file, and how CDORSI uses this structure, with the eventual EER to the targeted `shape_representation`, which will be used to declare this component instance as invisible.

The general setup of the EER shall follow the definitions given in the EER document Revision 3.2.

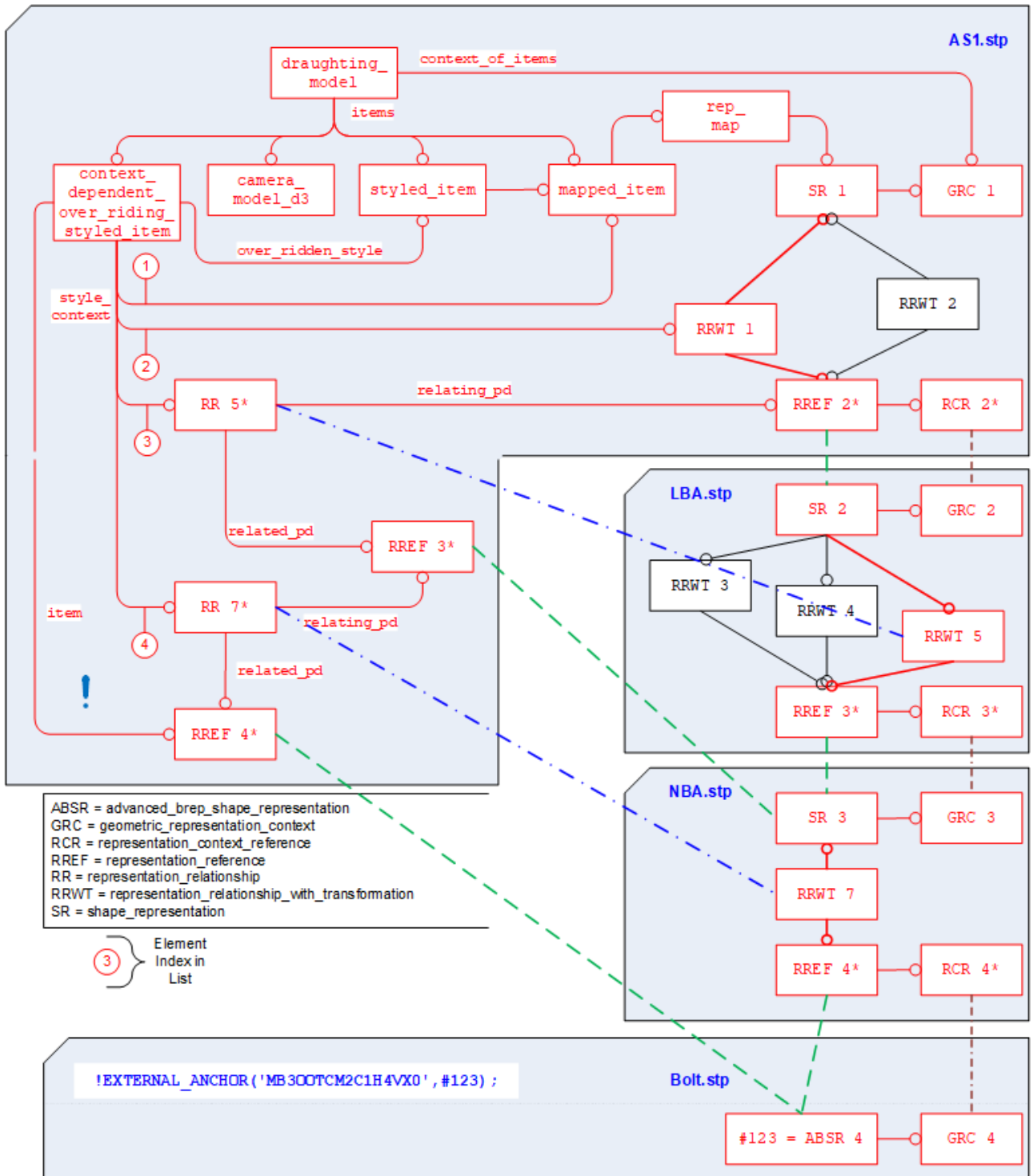


Figure 98: Changing the Display Style for a Component in a Nested Assembly

9.4.2.5 Definition of the Annotations to be displayed

The second main ingredient in the definition of a Saved View is which annotations – PMI as well as “plain” 3D Text – shall be displayed. This is done by including the desired annotation elements, i.e., the corresponding instances of:

- `draughting_callout` (or subtypes)
- `annotation_plane`

into the set of items of the `draughting_model`.

Note that while the first will include individual annotations, including an `annotation_plane` will by definition (see 9.3.3.2) include all annotations associated with that plane.

Note that some systems offer mechanisms to control the affiliation of items to a defined set using layer assignments and toggling the visibility of these layers rather than managing the individual elements. Though this document will not give a detailed description of this approach (at least for now), the following recommendations are given to ensure interoperability:

- Each layer shall be represented by an instance of `presentation_layer_assignment` with the respective name and the assigned annotations referenced in its set of items.
- The `context_dependent_invisibility` that controls which of the layers will be displayed in the selected set will reference the `draughting_model` as its presentation context.
- The actual displayed set of annotations, which is the result of combining all layer assignments and visibility definitions, shall be included in the set of items of the `draughting_model` in addition, as stated above.

This will allow all importing systems to directly access the information to be displayed, while at the same time preserving the layer definitions for those systems building on them.

9.4.2.6 Definition of the Viewing Orientation and Zoom Factor

As stated in its definition, a Saved View not only refers to a subset of the model geometry and the annotations to be displayed in the view, but also defines the viewpoint and direction of view relative to the model. In the STEP file, this is done by adding a `camera_model_d3` to the set of items of the `draughting_model`, as shown in Figure 99 below.

Note that it is this combination of `camera_model_d3` and `draughting_model` which defines a Saved View in STEP. There may be more than one `camera_model_d3` in the set of items of the `draughting_model`, meaning that the same contents will be displayed from different directions. Hence, the name of the saved view is stored in the camera model’s name attribute.

Part 21 Example

```
#276=PLANAR_BOX('#276',73.59058615,71.21669627,#275);  
#277=CARTESIAN_POINT('#277',(0.0,0.0,0.0));  
#278=VIEW_VOLUME(.PARALLEL.,#277,40.620193,40.620193,.T.,162.48078  
,.T.,.T.,#276);  
#282=AXIS2_PLACEMENT_3D('#282',#279,$,$);  
#283=CAMERA_MODEL_D3('TOP',#282,#278);  
#315=DRAUGHTING_MODEL('#315',(#307,#283,#295,#369,#371),#269);
```

Note that in the context of the revision of Part 46, changes have been made concerning the use of `camera_model_d3` and `view_volume`. This Recommended Practice already reflects the agreed changes.

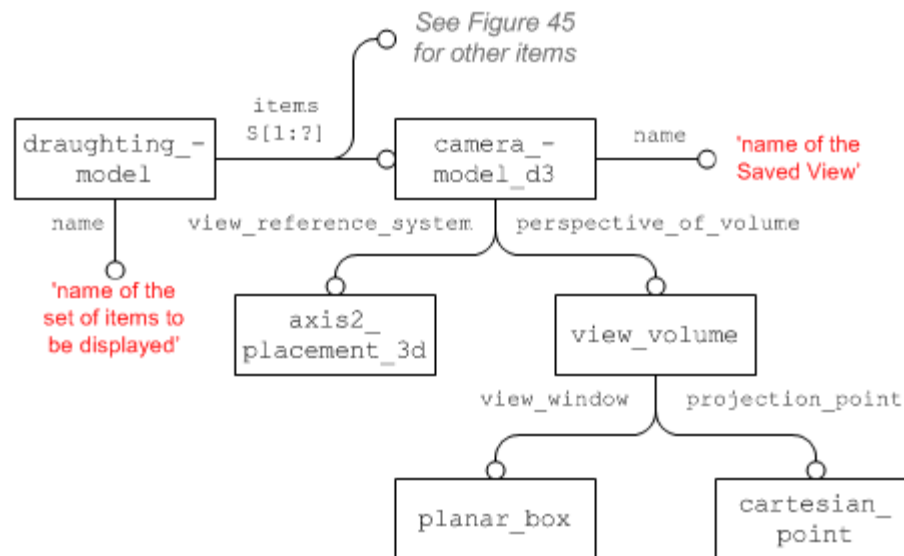


Figure 99: Camera definition for a Saved View

Recommendations for practical use:

- The `projection_point` shall be at the origin (0/0/0) of the `view_reference_system`.
- The `view_reference_system`'s z axis shall be the viewing direction, oriented from the camera to the target.
- The `view_window` placement shall not be rotated.
- The location of the `view_window`'s placement shall center the `view_window` on (0/0). The `planar_box.placement` location is the bottom left corner.
- The `view_window` shall be mapped to match the CAD system's window as far as possible while preserving the aspect ratio (see illustration below)
- `view_volume.front_plane_clipping` and `.back_plane_clipping` shall be set to `.F.` (false).
- The `view_volume.view_plane_distance` is always positive and determines the view distance – hence the zoom factor – of the model display.
- The `view_plane_distance` and the size of the `planar_box` must be defined with the unit of the `geometric_representation_context`.

The key agreement is that view reference system has its origin at the projection point. When this is applied to Figures 11 and 12 in Part 46 Edition 2 (ISO 10303-46:2008) section 4.4.36, it becomes clear that the view plane distance equals the distance from eye location to target.

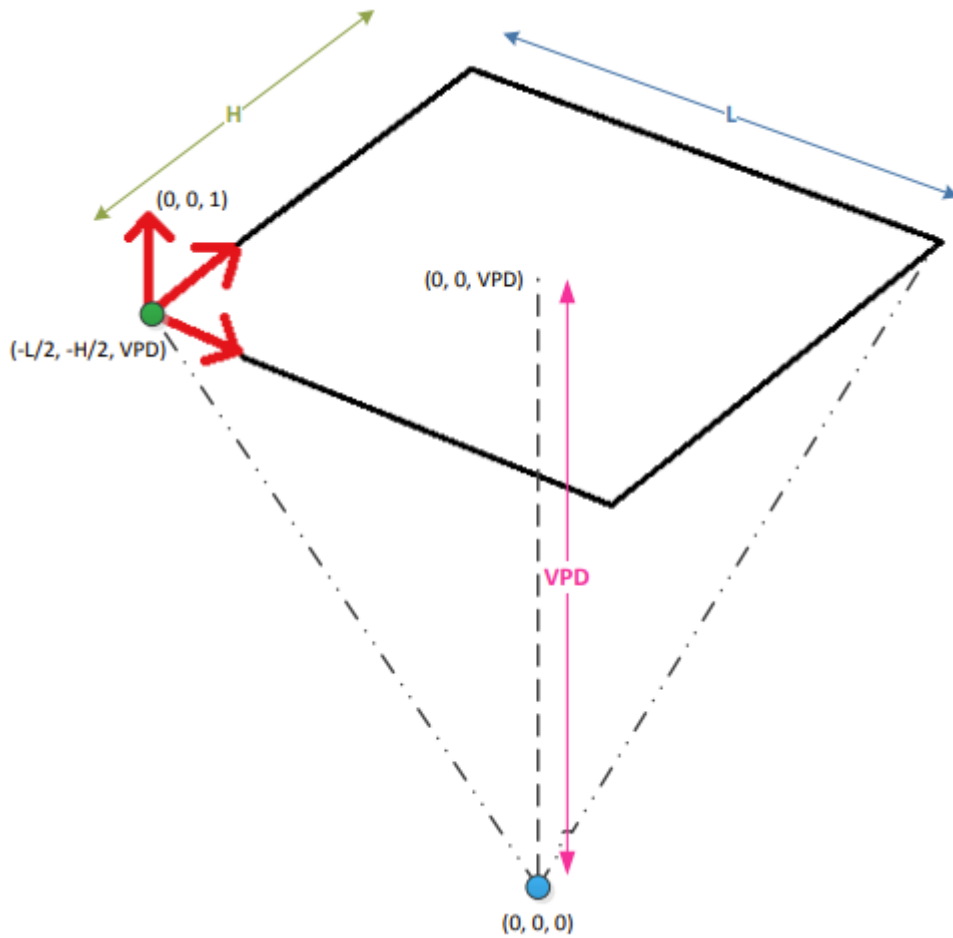


Figure 100: Illustration of the camera setup for a Saved View

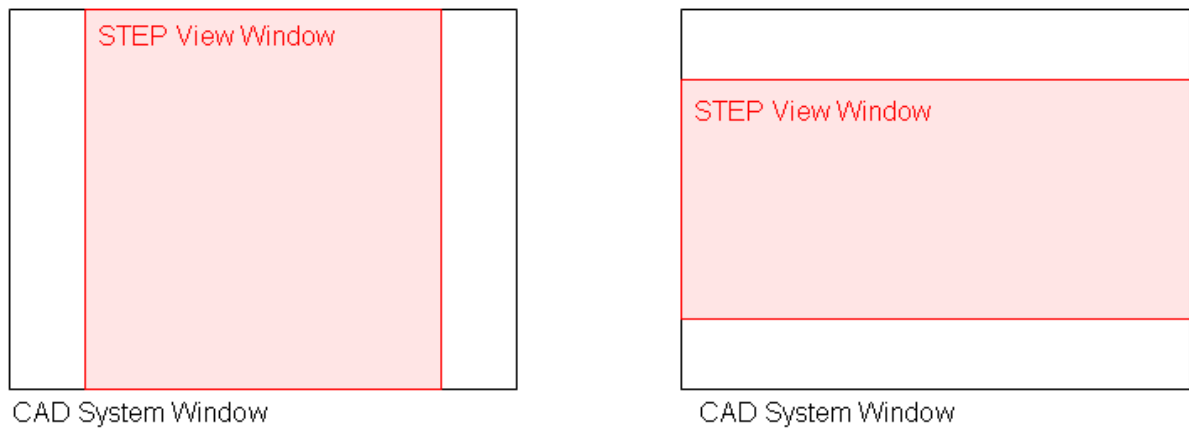


Figure 101: Mapping of the STEP view_window to the CAD system window

9.4.2.7 Definition of a Default Saved View

There are user requirements for the definition of a 'default' saved view. The intention is that this saved view shall be automatically activated when opening the model in a viewer or CAD system. This enables the immediate display of information on screen that is helpful for understanding and working with the model. ITAR statements are one use cases in this context.

Note that this capability does not relate to the so-called 'standard' saved views created by many CAD systems, such as 'top', 'left', 'front', etc.

As shown in Figure 96, a saved view in STEP is represented by a `model_geometric_view`. This combines a `draughting_model`, defining the contents of the view, and a `camera_model_d3`, providing the perspective.

The default view is defined using the subtype `default_model_geometric_view`, which was introduced with AP242 Edition 2. There are no further attributes; the presence of this entity defines the referenced saved view to be the default one. This entity type is also a subtype of `shape_aspect` and must reference the `product_definition_shape` of the part for which the view is defined. This is done to support a uniqueness rule that ensures that there can be only one default saved view per model.

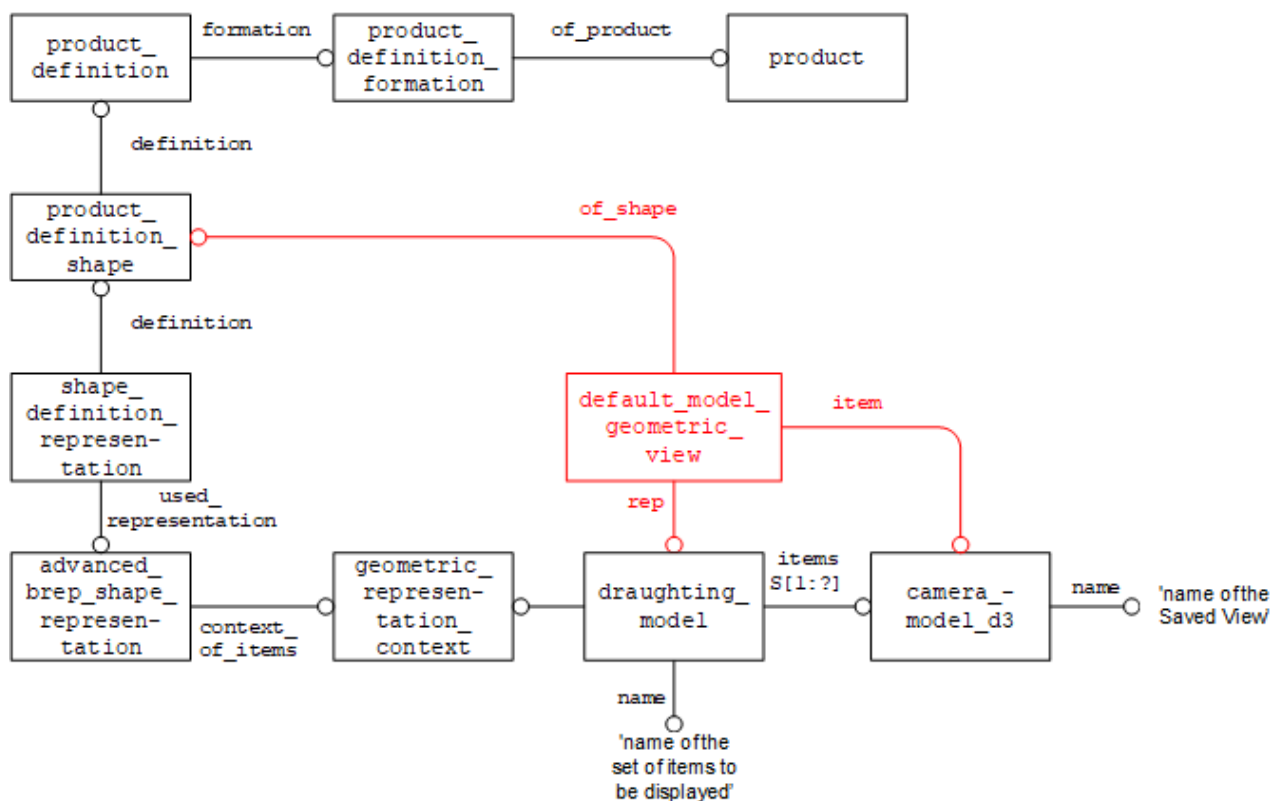
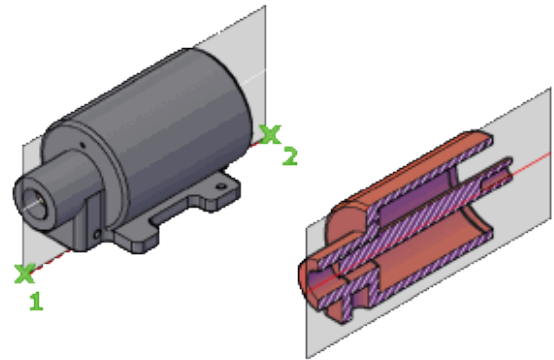


Figure 102: Definition of a default Saved View

9.4.3 Section Views

For a full 3D description of a part and especially its internal features, it may be necessary to define a Saved View which shows the model cut open in a certain way. PMI data attached to sections in a CAD model are an important way of providing manufacturing information, e.g., on holes.



This capability is usually referred to as “sectioning”. In STEP, it is called “clipping”. In this document, the two terms are used synonymously.

Note: This capability is supported only by AP203e2 and AP242, since the necessary camera model subtype, `camera_model_d3_multi_clipping`, is not in AP214 (neither IS nor 3rd Edition).

The `camera_model_d3` entity offers even more subtypes which allow for the implementation of further capabilities such as hidden line and surface removal (`camera_model_d3_with_hlshr`) or light sources (`camera_model_with_light_sources`). These may be considered in the remote future.

Using a single Plane

As stated above, a section view will be defined by using the `camera_model_d3_multi_clipping` entity type. All recommendations concerning viewing orientation and zoom factor given in 9.4.2 still apply. This subtype has an additional attribute to define the section geometry, which in the simplest case is a single plane. Figure 103 below shows the entity structure.

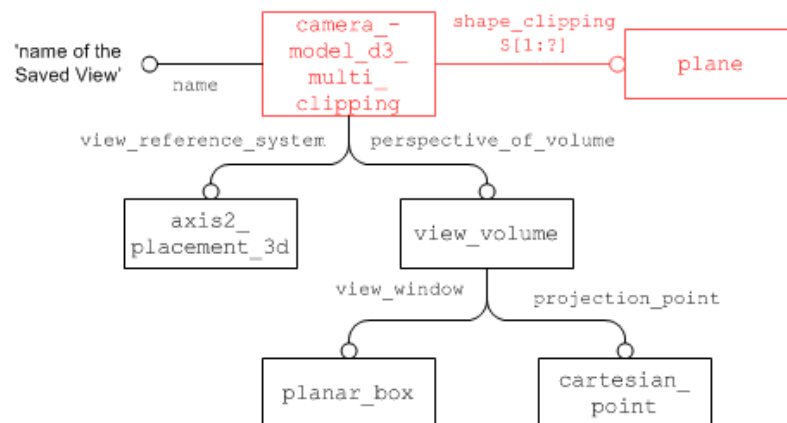


Figure 103: Definition of a Section View using a single Plane

The additional faces that are created in the model where the section geometry cuts the model open will not be transferred as explicit geometry but shall be determined by the target system. In a later edition of this document, recommendations will be given how these faces can be styled (e.g., with cross-hatching).

Defining advanced Sections

In many cases, more complex geometries are used for clipping. STEP provides a means of defining these by combinations (unions and intersections) of planes. This approach fulfills all requirements given by digital product definition standards (such as ISO 16792). In addition, discussion in the CAX-IF showed that all major CAD systems either use a similar approach, or one that can be unambiguously mapped to and from the STEP approach. In order to ensure interoperability, the following restriction shall be observed when using combinations of planes:

Note: all planes used in the definition of the section geometry for a view shall be perpendicular to one other plane.

This ensures that the resulting section geometry could also be created by extruding a polyline. Some CAD systems even allow arbitrary cutting geometry (e.g., a sphere). This is out of scope.

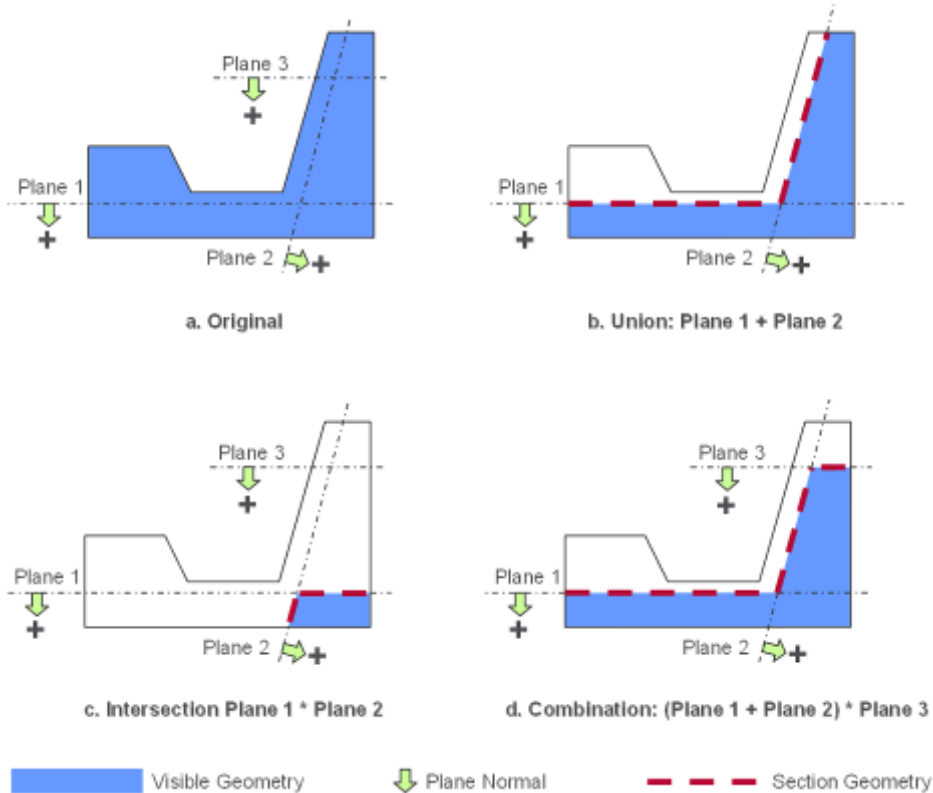


Figure 104: Schematic representation of possible clipping cases

Each plane defines two half spaces (positive and negative), where the positive side is the one the normal is pointing to, as illustrated in Figure 104 above. When the section is applied, the contents of the negative half spaces will be removed, while the contents of the positive half spaces remain visible. There are two operations which allow combining two or more planes:

- **Union:** any geometry contained in the positive half space of any of the referenced planes is displayed (see Figure 104b)
- **Intersection:** only geometry contained in the positive half space of all referenced planes combined is displayed (see Figure 104c).

The default operation applied by `camera_model_d3_multi_clipping` is intersection, as shown in Figure 104c. To apply a union as shown in Figure 104b, use the subtype `camera_model_d3_multi_clipping_union`. These operations can be combined to build more complex cases, such as the so-called “step”, see Figure 104d. It should be noted that using a mixture of several planes, especially when using intersections, may easily lead to an empty view (no part geometry remains in the resulting “positive” space), so this should be applied carefully. Also note that some CAD systems have a limit in the number of planes supported for a section view. For instance, NX and Inventor support at most two planes, so for these systems, example ‘d’ is out of scope.

Figure 105 below illustrates how to implement the examples from Figure 104.

Note the different cardinality of the `shape_clipping` attribute in `camera_model_d3_multi_clipping` and its union / intersection subtypes. It is of course also possible to define e.g., a union

of more than two planes at once, or to use several planes directly in the camera_model_d3_multi_clipping.

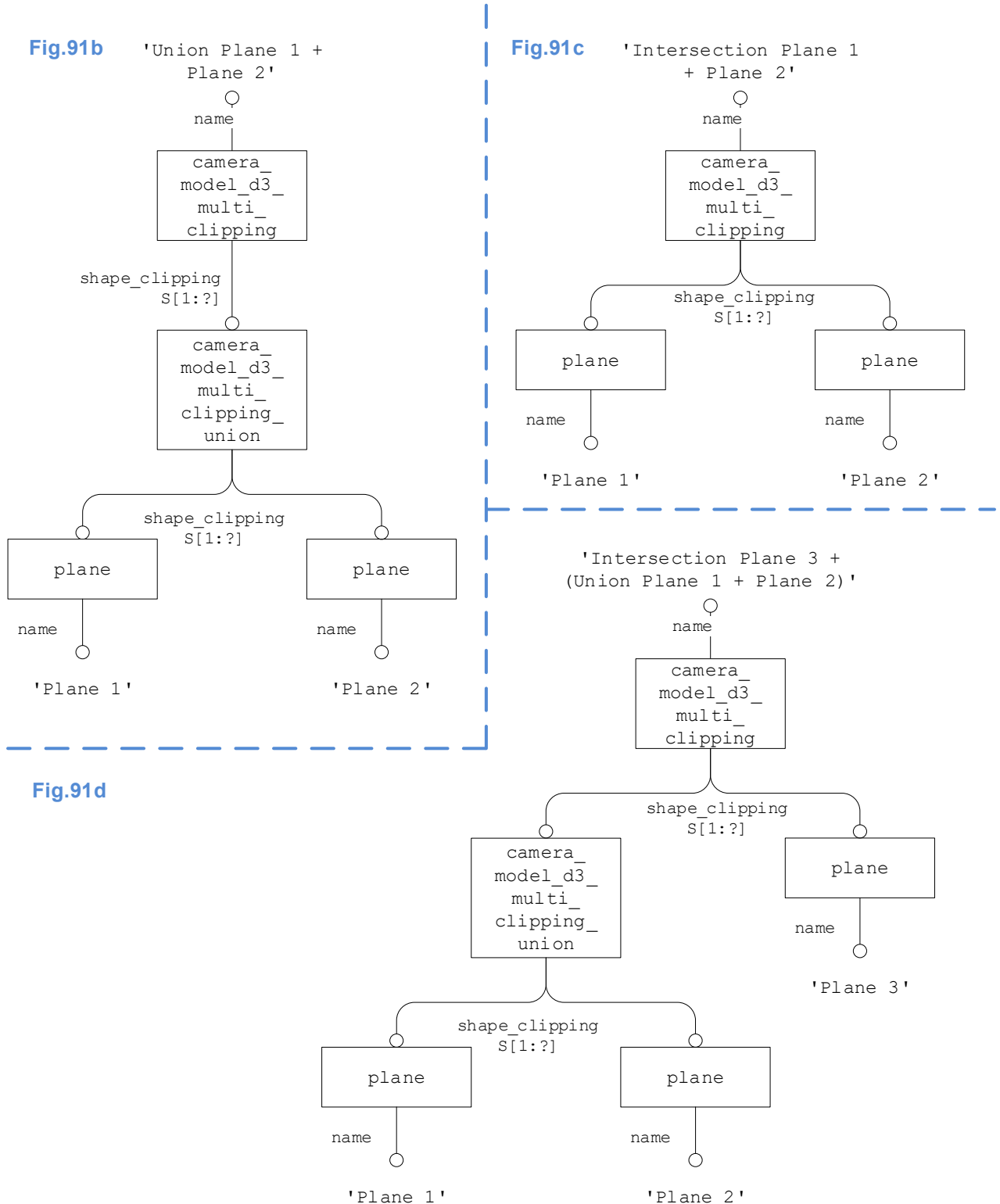


Figure 105: Definition of a Saved View using a Combination of Planes

9.4.4 Relating the draughting_models

As stated before, the named `draughting_model` defines a subset of the geometry and annotations defined in the file. If such a `draughting_model` references an `annotation_plane`, all the `draughting_callouts` in its set of elements are added to the set. Where reference is required for a subset of those annotations linked to an `annotation_plane`, the `draughting_model` references those specific `draughting_callouts` directly.

The global `draughting_model` (see 9.2) and those defining sets of displayed elements are also put in relation to each other.

Note that annotations may be contained in several Saved Views and hence will be referenced multiple times: once by the global `draughting_model`, and once for each set of items for display they are contained in. In the receiving system, these annotations still shall be displayed only once.

Each `draughting_model` for a selected set of items has to be related to the global `draughting_model` through a `mechanical_design_and_draughting_relationship` (MDADR; a subtype of `representation_relationship`), where the global view is always referenced in the `rep_2` attribute, and the saved view in `rep_1` (see Figure 106 below).

Note in earlier versions (before 4.0) of this document, the use of the attributes `MDADR.rep_1` and `rep_2` was reversed compared to the description given above. However, MDADR is also a subtype of `definitional_representation_relationship`, for with Part 43 states: “The representation indicated by `rep_1` is part of the definition indicated by `rep_2`”. Since there are more ways of differentiating the roles of the related `draughting_models` (see Table 20 below), it was decided to fix this definition and reverse the attributes with version 4.0 of this document.

Note that the entity type `mechanical_design_and_draughting_relationship` is not included in AP214 Edition 3. Hence, the use of the supertype `representation_relationship` is recommended for this purpose in AP214 files and has to be supported on import into AP242.

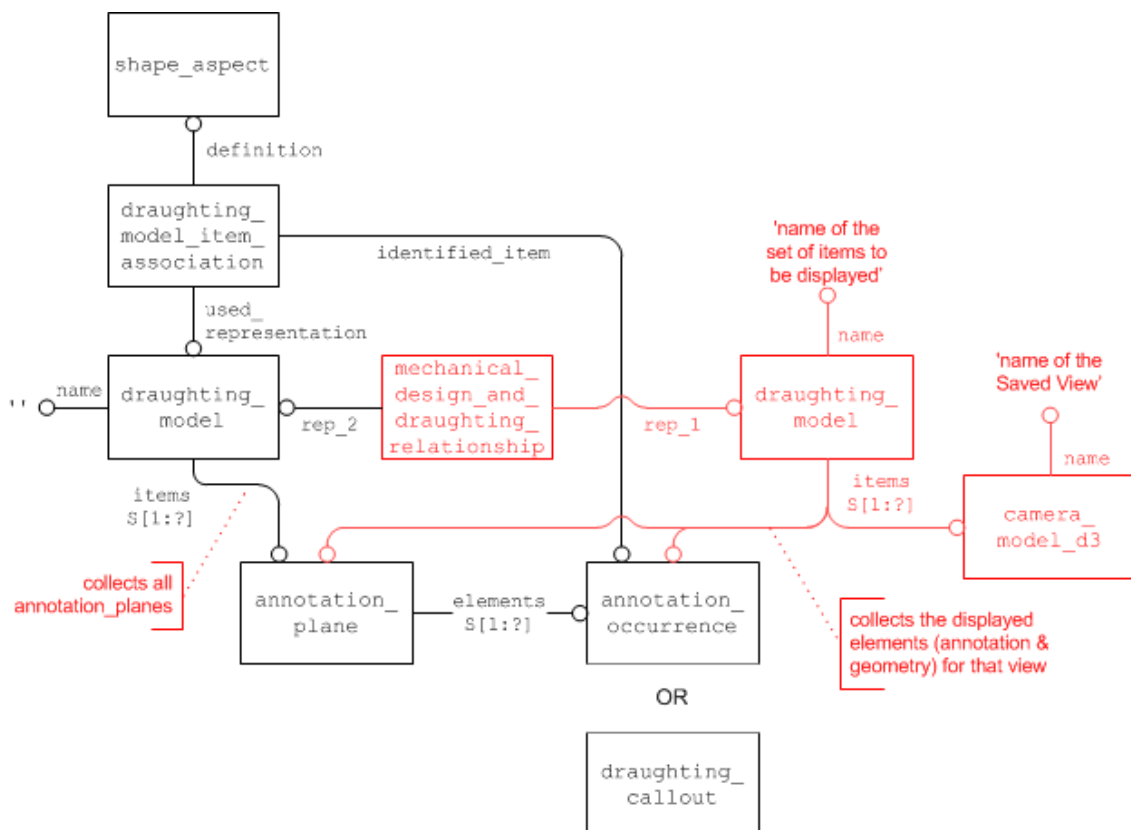


Figure 106: Relating the global and Saved Views

The following table illustrates the differences between the global `draughting_model` and that for a saved view:

Property	Global	Saved View
<code>draughting_model.name</code>	" (empty string)	Name for the set of elements display in the view
related annotations	all <code>annotation_planes</code>	Some <code>annotation_planes</code> and additional annotation elements as per the Saved View definition
<code>camera_model_d3</code>	none related	one or several in the set of items ^(*)
<code>camera_model_d3.name</code>		Name of the Saved View as defined in the CAD system
MDADR attribute	<code>rep_2^(**)</code>	<code>rep_1^(**)</code>
<code>draughting_model_item_association</code>	one for each annotation element	None

(*) = Though it is not mandatory to have a `camera_model_d3` in the `draughting_model`'s set of items, it is required to complete the Saved View definition. More than one `camera_model_d3` means that there are several Saved Views which display the same set of elements.

(**) = These two attributes were reversed in earlier versions (before 4.0) of this document.

Table 20: Global and Saved View draughting_model properties

9.4.5 Advanced Saved View Implementation

Note: This section has been removed since the described functionalities, such as the support for "flat to screen" annotations, require updates in the AP242 data model to be fully implementable and consistent with other presentation approaches. This section will be added back in once these updates are available. No target date is currently available for this.

10 PMI Validation Properties

This section concerns the definition of ‘validation properties’ for PMI data. Similar to the Geometric Validation Properties, they aim to add information about the PMI data contained in the model to the STEP file, so that an importing system has reference points to verify if all data has been processed correctly.

The exporting system will calculate the respective values based on the native model and write them as numerical or string values into the STEP file. The receiving system upon import will re-create the information from the file, and derive the same attributes based on the results. These will be compared the data given in the file, and if the values match, the import will be deemed successful. The approach used for implementation is based on the “general property” approach defined in Part 41, and widely used of other types of validation properties.

10.1 Validation Properties for Semantic PMI Representation

This section of the recommended practices contains the definition of ‘validation properties’ for Semantic PMI Representation data. As with all validation properties, the goal is to add information about the semantic PMI data contained in the model, to the STEP file in a way that will allow any consuming application to validate the completeness and correctness of the transferred data.

The PMI validation properties defined in this section apply to Semantic PMI Representation data only. Validation Properties for PMI Presentation are defined in section 10.2 below. If the STEP file contains both Representation and Presentation of PMI, and the two are linked together per section 7.2.5 of this document, the validation properties can also be used for cross-checking of the data as far as applicable.

Note: Many of the validation properties are element counts, hence integers. In a STEP file, the value of `integer_representation_item` has to be written as a REAL number, i.e., with trailing decimal point.

- In general, values of type INTEGER are represented in a Part 21 file as integers, i.e., no decimal point. The case of `integer_representation_item`, however, is special. `integer_representation_item` is a subtype of `int_literal`, which is a subtype of `literal_number`. The latter defines the attribute `the_value` as of type NUMBER; `int_literal` then re-declares that to restrict it to INTEGER. Part 21 defines that in the case of a re-declared attribute, the original (more generic) type shall be used for implementation, here: NUMBER. And NUMBER maps to REAL in Part 21, hence the decimal point. So basically, `integer_representation_item` is an integer with an identity crisis, but from the context (name of the entity) it is clear that the decimal point shall be ignored.
- For compatibility with existing data, `integer_representation_item` values without decimal points shall be supported as well on import.

10.1.1 Validation Properties on the Part/Product Level

In order to provide the user with a summary of the semantic PMI representation data, validation properties can be defined to each part (product) in the file. The primary intention of these is to act as a checksum for the specified sets of information.

Note that in the case of an assembly, the count of PMI elements shall not be accumulated, but only represent the number of PMI elements defined at that level.

10.1.1.1 Total number of Semantic PMI Elements per part

The value contains the total number of Semantic PMI elements defined on the part. This does not relate to the number of STEP entity instances related to Semantic PMI, but to the number of PMI constructs as defined in the authoring system.

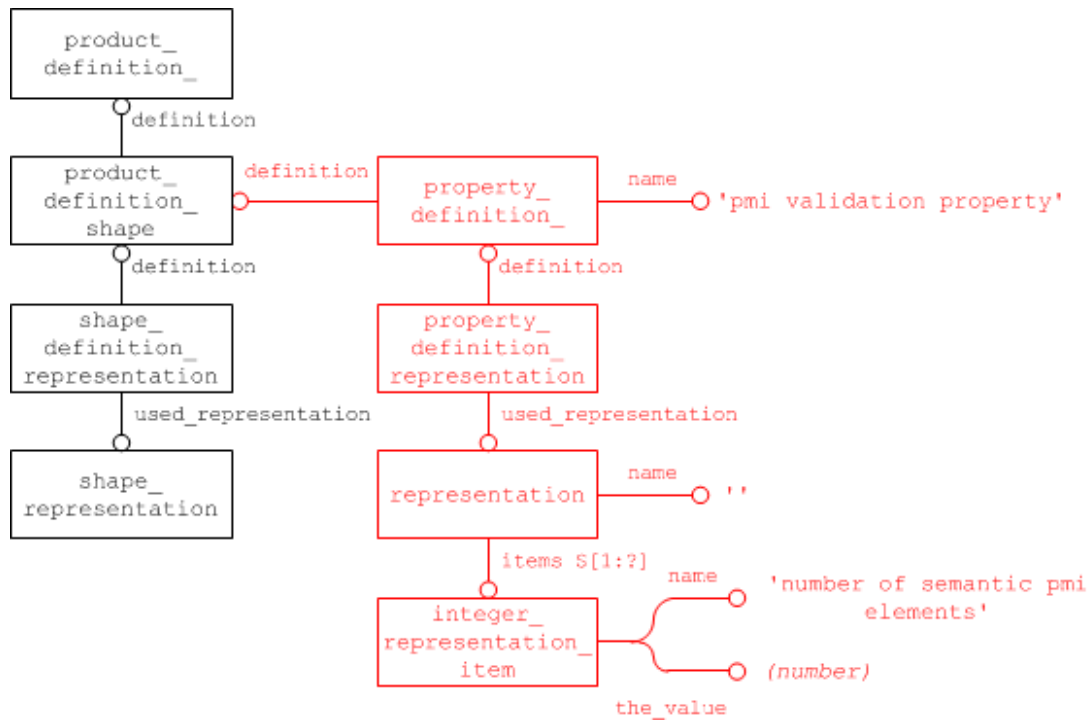


Figure 107: Validation Property for total number of Semantic PMI elements for a part

10.1.1.2 Total number of Semantic PMI Elements per PMI Type

To enable a more precise validation, counts of PMI elements will be broken down into the major PMI types. These are derived from the top level of the list given in section 7.2.5. The STEP file structure is the same as for the total number of PMI elements, see Figure 114. The only difference is the suggested strings for the name attributes, which are:

Attribute	Recommended value
property_definition.name	'pmi validation property'
representation.name	"
integer_representation_item.name	'number of <PMI Type>' (<i>ref. Table 22</i>)
integer_representation_item.the_value	(<i>number of views</i>)

Table 21: Attribute Values for the 'number of <PMI Type>' Validation Property

The “<PMI Type>” can be one of the values given in Table 22, corresponding to the number of instances of the respective entity type, or any of its subtypes.

Note that “semantic text” elements as defined in section 7.4 do not count as semantic PMI elements for the semantic PMI validation properties; they have their own count, given in 7.4.3.

PMI Type	STEP Entity Type (or Subtype)	integer_rep_Item.name
Dimensional Location	dimensional_location	'number of dimensional locations'
Dimensional Size	dimensional_size	'number of dimensional sizes'
Geometric Tolerance	geometric_tolerance	'number of geometric tolerances'
Composite Tolerance	geometric_tolerance_relationship (name='composite')	'number of composite tolerances'
Datum	datum	'number of datums'
Datum Target	placed_datum_target_feature	'number of datum targets'

Table 22: Relevant PMI Types for Validation Properties

The inclusion of subtypes means that an instance of `angularity_tolerance` will contribute to the 'Geometric Tolerance' count. Since the main purpose of the validation properties is to ensure completeness of the data, it was determined that counting the main types is sufficient. Counting further subtypes also bears the risk of introducing ambiguities in the case of complex entities when several tolerance types are combined into one, e.g., to add modifiers.

There is a notable difference between stacked tolerances, where several semantically independent tolerances are combined into one feature control frame simply to provide a convenient presentation, and composite tolerances, where the combination and order of tolerances does have a semantic meaning.

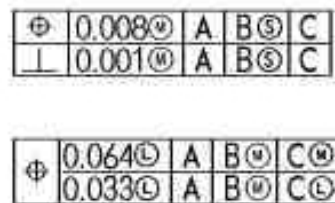


Figure 108: Stacked Tolerances (top) vs. Composite Tolerance (bottom)

In order to validate such compositions, a dedicated validation property was added for this purpose. Based on the definition of composite tolerances as given in section 0 of this document, the count will be based on instances of `geometric_tolerance_relationship` with a name of 'composite'. In the example given above in Figure 108, the geometric tolerances count is 4; the composite tolerances count is 1.

Note: Whenever Semantic PMI Representation Validation Properties are included, all values listed in Table 22 shall always be given. This means that if for instance no datum targets are defined in the model, the 'number of datum targets' count shall be instantiated with a value of 0, to explicitly state that there are none. This will help to detect unintended automatic creation of PMI elements by the target system.

Note: It seems to be a common practice that "blank dimensions" are used to create a desired set of extension lines; i.e., a dimension is created by the user, but the value is being hidden. In this case, the dimension does not carry the meaning of an actual dimension; it is just a means to an end (to create the extension lines). Hence, these "blank dimensions" shall not be exported as semantic dimensions, and consequently not counted as such in the validation properties.

Note that the initial definition of Semantic PMI Validation Properties per Table 22 contained a count for 'total number of datum features'. Version 4.0.7 of this document replaced that with the more meaningful 'number of datums'. The number of datum features is no longer recommended to be exported as a validation property but should be supported on import for compatibility.

Part21 Example

```
#100=PRODUCT_DEFINITION('design', $, #90, #25);  
#101=PRODUCT_DEFINITION_SHAPE('', $, #100);  
#102=SHAPE_DEFINITION_REPRESENTATION(#101, #103);  
#103=SHAPE_REPRESENTATION('#103', (#442, #447, #452), #26);  
#110=PROPERTY_DEFINITION('pmi validation property', '', #101);  
#120=PROPERTY_DEFINITION_REPRESENTATION(#110, #130);  
#130=REPRESENTATION('', (#140), #80);  
#140=INTEGER_REPRESENTATION_ITEM('number of semantic pmi  
elements', 4.);
```

10.1.2 Validation Properties on the PMI Element Level

While the PMI validation properties on the part/product level aim to validate that the set of PMI data as a whole is complete, similar validation properties can be defined on the PMI element level to ensure that each element remains fully defined after an exchange.

The validation properties will be defined for each of the five top-level semantic PMI elements (see Table 22 above), as they have different characteristics that can be validated.

10.1.2.1 Validation Properties for Dimensional_Size

The `dimensional_size` entity is used where the measurement only applies to one object, rather than being a measurement between two distinct objects. Details for its implementation are given in section 5.1.5.

While not supported in AP242e1, validation properties can be defined on `dimensional_size` in AP242e2, as it is a member of the newly introduced `characterized_item` select type, which in turn is now included in `characterized_definition`.

Figure 109 below illustrates the general structure for defining a validation property on a `dimensional_location`. Also see section 5.1.5, Figure 12 for comparison. The type of `representation_item` and the population of its attributes will depend on the actual validation property, as defined in section 10.1.3 below.

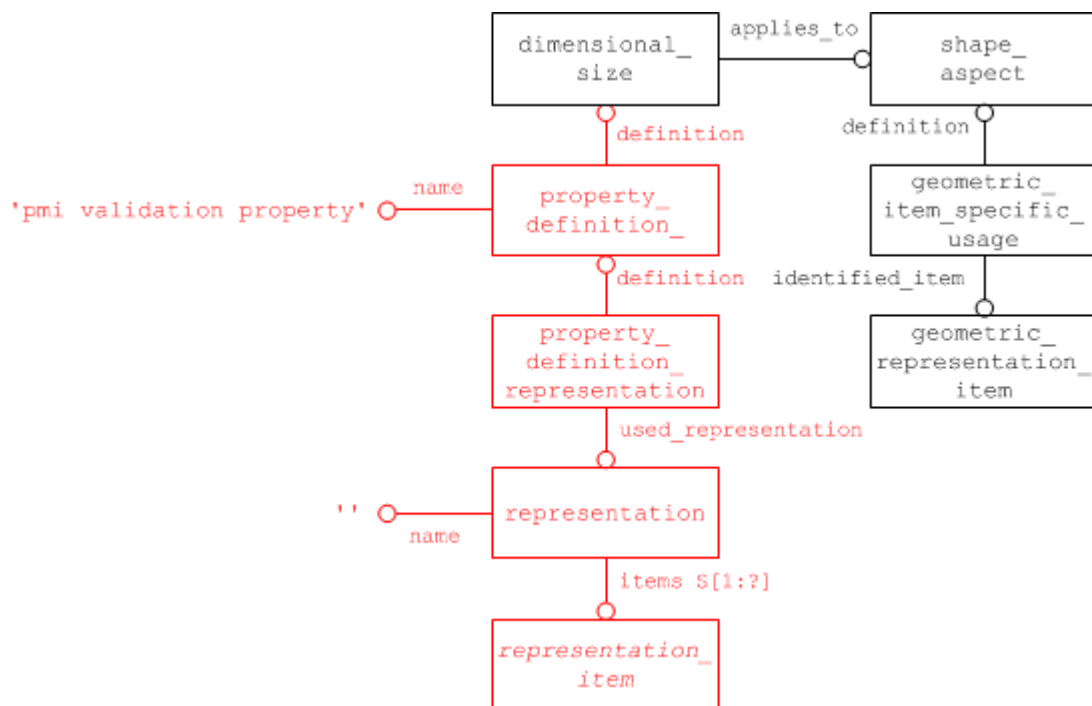


Figure 109: Validation Property for Dimensional Size

10.1.2.2 Validation Properties for Geometric_Tolerance

The purpose of tolerances is threefold:

1. The tolerances should be specified so that the part functions as intended.
2. The part tolerances should not make it too difficult to manufacture.
3. The part should not be so precise as to drive up manufacturing costs inordinately.

Section 0 defines how to apply tolerances to model features (e.g., flatness) or to dimension values.

Hence, from a validation point of view, it is important to ensure no tolerances are lost during the transfer, as well as safeguarding that all correct associations with the underlying features or values are maintained.

While not supported in AP242e1, validation properties can be defined on `geometric_tolerance` in AP242e2, as it is a member of the newly introduced `characterized_item` select type, which in turn is now included in `characterized_definition`. Note that typically, not `geometric_tolerance` itself is being instantiated, but its applicable subtype. Section 7.2.5 gives a concise listing of these subtypes.

Figure 110 below illustrates the general structure for defining a validation property on a `dimensional_location`. The type of `representation_item` and the population of its attributes will depend on the actual validation property, as defined in section 10.1.3 below.

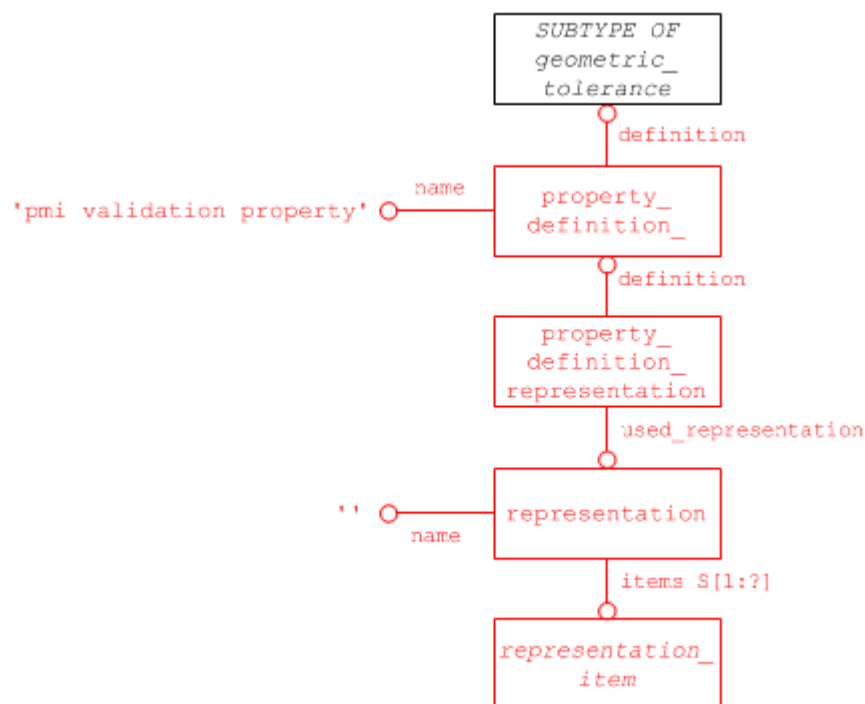


Figure 110: Validation Property for Geometric Tolerance

10.1.2.3 Validation Properties for Dimensional_Location

A `dimensional_location` is a type of `shape_aspect_relationship`, hence an element of the `characterized_definition_select` type used by `property_definition.definition`.

Figure 111 below illustrates the general structure for defining a validation property on a `dimensional_location`. Also see section 5.1.1, Figure 6 for comparison. The type of `representation_item` and the population of its attributes will depend on the actual validation property, as defined in section 10.1.3 below.

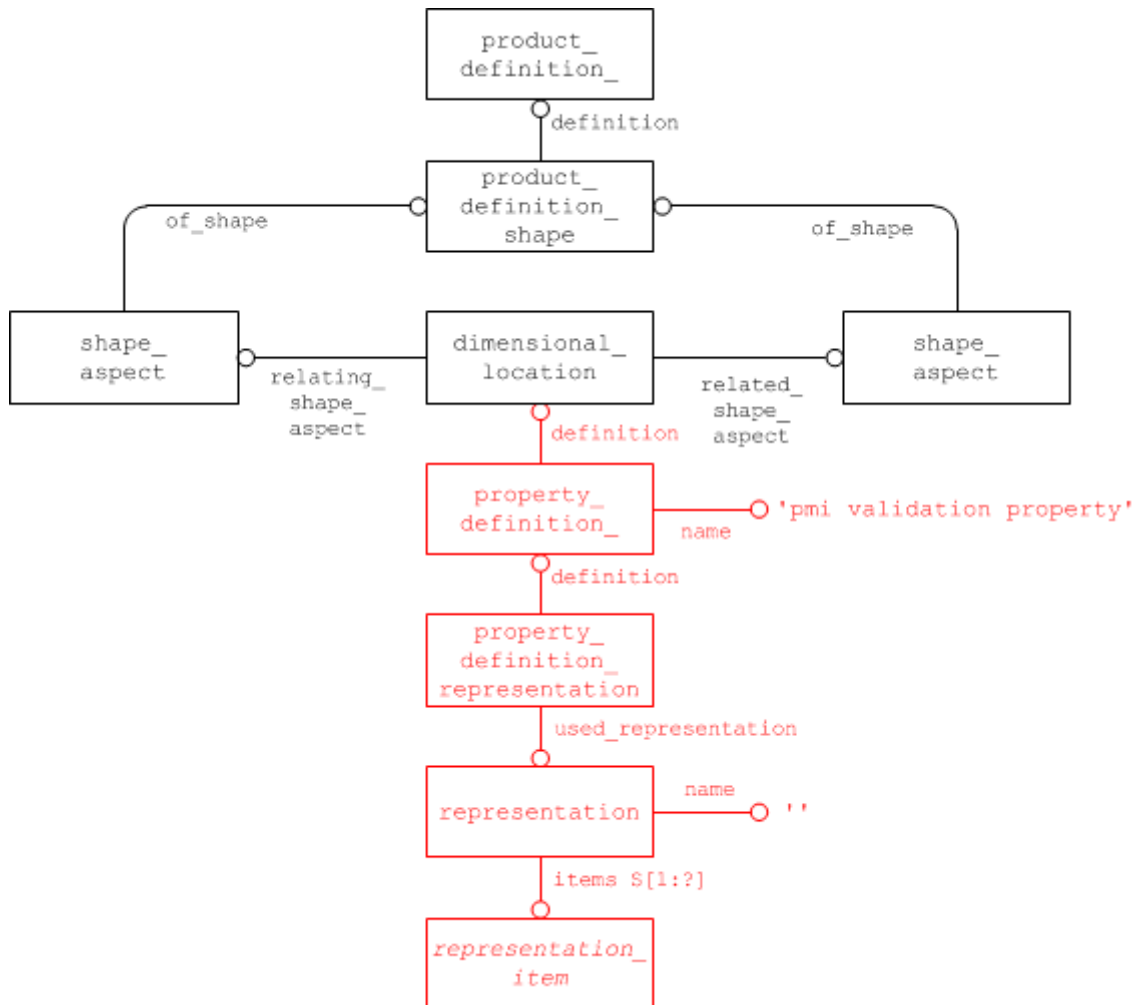


Figure 111: Validation Property for Dimensional Location

10.1.2.4 Validation Properties for Datum

A datum is a type of `shape_aspect`, hence an element of the `characterized_definition_select` type used by `property_definition.definition`.

Figure 112 below illustrates the general structure for defining a validation property on a datum. Also see section 6.5, Figure 36 for comparison. The type of `representation_item` and the population of its attributes will depend on the actual validation property, as defined below.

Note: In older versions of this document (before 4.0.6), the validation property was attached to the `datum_feature`. It has since been agreed to move it to the `datum` to avoid ambiguities.

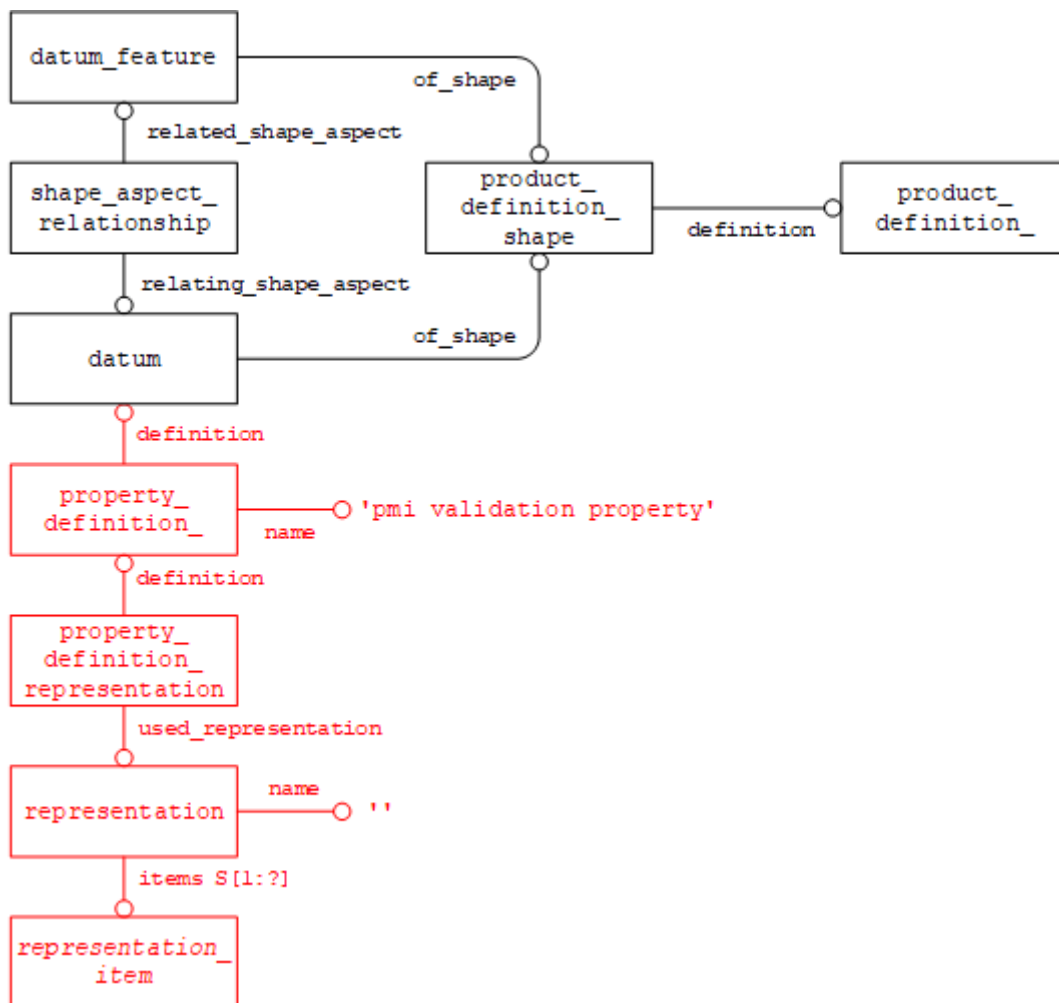


Figure 112: Validation Property for Datum Feature

10.1.2.5 Validation Properties for Placed_Datum_Target_Feature

A `placed_datum_target_feature` is a type of `shape_aspect`, hence an element of the `characterized_definition_select` type used by `property_definition.definition`.

Figure 113 below illustrates the general structure for defining a validation property on a `placed_datum_target_feature`. Also see section 6.6.1, Figure 43 for comparison. The type of `representation_item` and the population of its attributes will depend on the actual validation property, as defined below.

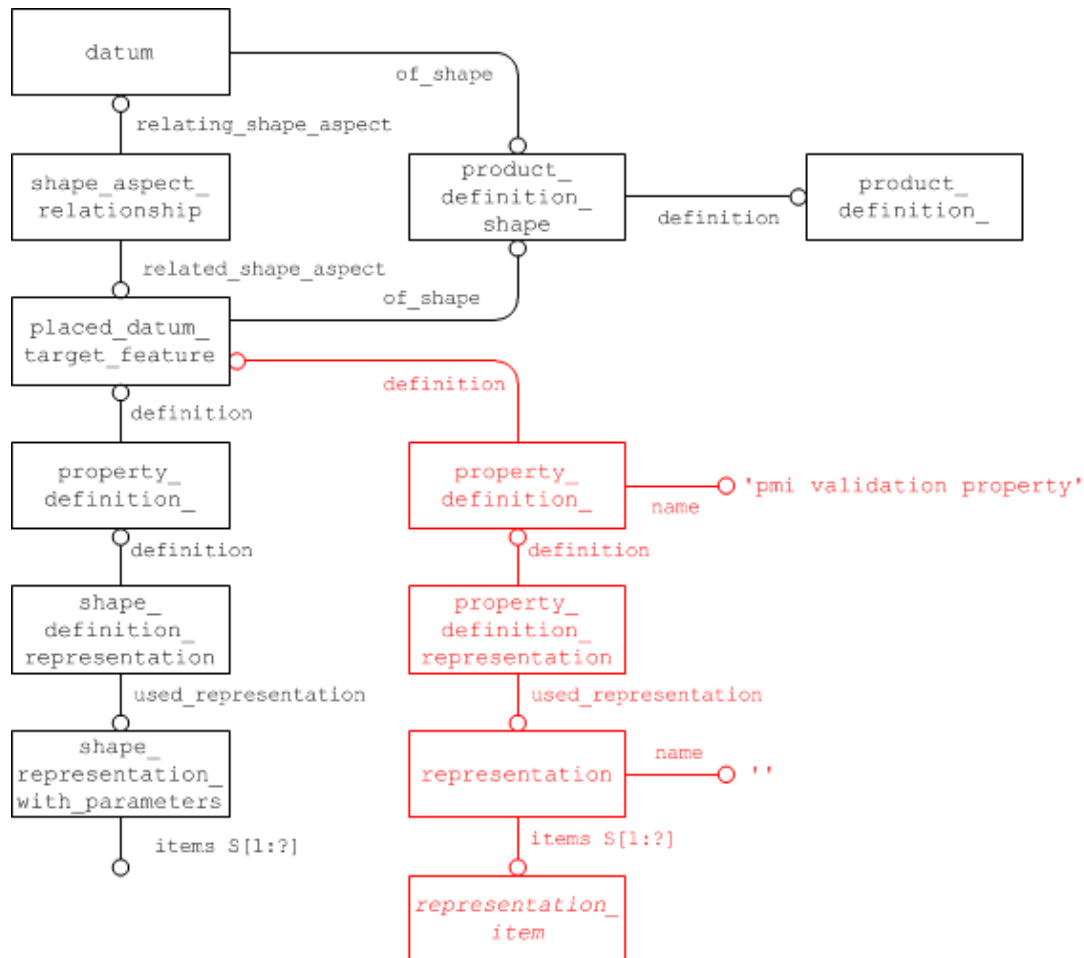


Figure 113: Validation Property for Placed Datum Target Feature

10.1.3 Applicable PMI Element Validation Properties

The following sections list which validation properties can be defined on semantic PMI elements, including a description of their respective purpose and the corresponding type and population of `representation_item`. The section at the end provides a matrix listing which validation properties apply to which of the five types of PMI elements described above.

10.1.3.1 Affected Geometry

An important aspect of the semantic definition of a PMI element is which portion of the geometric model shape the PMI statement applies to. Since there are a number of examples where the topologic definition of the model will change during the conversion to and from STEP (the most popular example being a cylinder becoming split into two half-cylinders), it is all the more important to provide a means of validating that the geometry affected by a PMI statement does not change.

Depending on the type of the respective PMI element, the “affected geometry” validation property will convey one of the following two values:

- The total surface area for PMI associated with faces (e.g., a flatness tolerance)
- The total curve length for PMI associated with edges or curves (e.g., a dimension).

Note that according to section 6.6.2, a PMI element does not necessarily apply to a whole feature of the model, but rather a specified target area. In this case, the validation property shall contain the length or area of the target geometry.

representation_item	Recommended value
Type	positive_length_measure
Name	'affected curve length'
Value	Total length of the curves and edges the PMI applies to, via the related shape_aspects
representation_item	Recommended value
Type	area_measure
Name	'affected area'
Value	Total surface of the faces the PMI applies to, via the related shape_aspects

Table 23: Affected Geometry Validation Property

10.1.3.2 List of Datum References

Geometric tolerances are usually associated with a number of Datums, as shown in section 6.8, Table 12. To ensure completeness of the data, the list of datum references in their correct order is a good validation property:

representation_item	Recommended value
Type	decriptive_representation_item
Name	'datum references'
Value	'none', or listing of datum references in correct order, e.g., 'D,E,F'.

Table 24: List of Datum References Validation Property

Note: Older version of this document (before 4.0.6) showed a simple count of datum references with an integer_representation_item. Based on pilot project feedback, it was decided to use the list instead.

10.1.3.3 Equivalent Unicode String

Semantic PMI data can be converted into an equivalent Unicode string, which basically reflects the contents of the corresponding PMI Presentation if it were defined. However, the equivalent Unicode string on the Semantic PMI side is completely independent from any Presentation. It does allow for validating Modifiers (e.g., “ $\text{\textcircled{M}}$ ”), multiple features (e.g., “4 x ...”), and others.

A guideline on how to derive an equivalent Unicode string for a specific PMI element can be found in the “PMI Unicode String Specification (Revision J)”, which can be found on the CAX-IF homepages under “Joint Testing Information”.

It will be instantiated as follows:

representation_item	Recommended value
Type	descriptive_representation_item
Name	'equivalent unicode string'
Value	Equivalent Unicode String

Table 25: Equivalent Unicode String Validation Property

10.1.3.4 Number of linked PMI Presentation Elements

If Semantic PMI Representation and PMI Presentation are defined in the same file, the corresponding definitions can be linked together as defined in section 7.2.5. To make sure the associativity is maintained, the number of linked PMI Presentation Elements (i.e., annotations) for a Semantic PMI element can be used for validation. According to section 7.2.5, this equals the number of instances of `draughting_model_item_association` where the `definition` attribute points to the Semantic PMI element in question and the `identified_item` is either a `draughting_-callout` or an `annotation_occurrence` subtype.

representation_item	Recommended value
Type	integer_representation_item
Name	'number of PMI presentation elements'
Value	<count>

Table 26: Number of Datum References Validation Property

10.1.4 Applicability of Semantic PMI Validation Properties to PMI Types

The following table gives an overview on which of the validation properties defined in section 10.1.3 apply to which of the PMI types defined in section 10.1.2 above:

Validation Property	PMI Type				
	dimensional_location	datum	placed_datum_target_feature	dimensional_size	geometric_tolerance
Affected Geometry	X	X	X	X	X
Number of Datum References					X
Equivalent Unicode String	X	X	X	X	X
Number of linked PMI Presentation Elements	X	X	X	X	X

Table 27: PMI Element Validation Property Applicability

10.1.5 Use of PMI Presentation Validation Properties for Semantic PMI

In addition to defining the dedicated validation properties for semantic PMI representation as defined in the sections above, it is to some extent also possible to harvest the validation properties for the corresponding PMI presentation elements and use them to crosscheck the semantic information in the file.

The prerequisite for this is of course that the semantic PMI representation and corresponding PMI presentation elements are linked together, as defined in the section 7.2.5.

Then, the “Affected Geometry” and “Equivalent Unicode String” validation properties can be utilized. However, it needs to be considered that if the relationship between representation and presentation are 1:1 or n:m – a PMI annotation can display information combined from several semantic entities, and the validation properties would have to be “distributed” accordingly. For instance, in the case of composite tolerances (see section 0), all geometric tolerances that are constituents of the composition will be linked to one and the same annotation for the composite feature control frame. It also needs to be considered that due to different internal data models in the various CAD systems, semantic definitions may get split or merged between system A and B, which may lead to additional inconsistencies even in the case of a correct data transfer.

10.2 Validation Properties for Graphic PMI Presentation

The following Validation Properties cover various aspects of Graphic PMI Presentation. Some of them are specific to whether the Polyline (see 8.1) or Tessellated (see 8.2) approach is used.

10.2.1 Validation Properties on the Part/Product level

In order to provide the user with a summary of PMI information, validation properties can be defined for each part (product) in the file. The primary intention of these is to act as a checksum for the specified sets of information.

Note that in the case of an assembly, the count of PMI elements shall not be accumulated, but only represent the number of PMI elements defined at that level.

10.2.1.1 Total number of annotations per file

The value contains the total number of annotations in the file, regardless of their semantic origin (PMI or other) and which views they are assigned to. The suggested strings to use in the name attributes are shown in Figure 114 below:

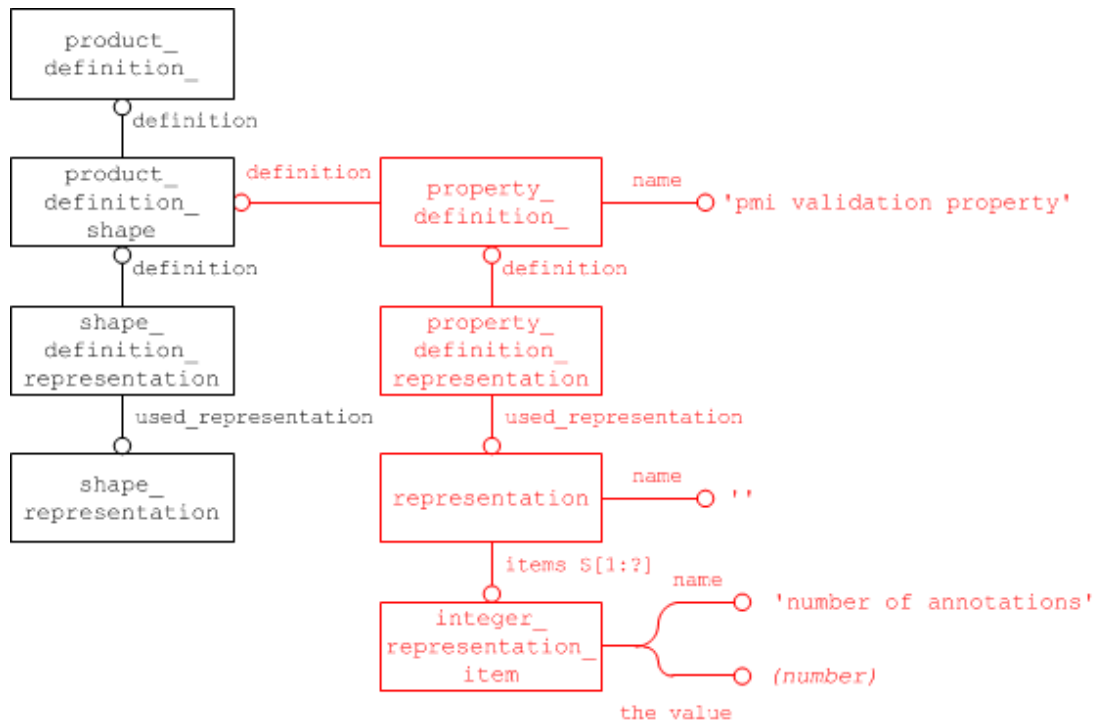


Figure 114: PMI Validation Property for total number of annotations per part

10.2.1.2 Total number of views

The total number of views for a part is also linked to the respective product in the file. The STEP file structure is the same as for the total number of annotations, see Figure 114. The only difference is the suggested strings for the name attributes, which are:

Attribute	Recommended value
property_definition.name	'pmi validation property'
representation.name	"
integer_representation_item.name	'number of views'
integer_representation_item.the_value	(number of views)

Table 28: Attribute values for the 'number of view' validation property

10.2.2 Validation Properties for Saved Views

A Saved View is defined by a combination of draughting_model and camera_model_d3, where the draughting_model specifies what can be seen on screen, while the camera_model_d3 provides the viewpoint. See section 9.4.2 for details. Thus, there are two ways of defining validation properties for Saved Views, depending on whether they address the contents or the perspective.

10.2.2.1 Associating Validation Properties to Saved Views

Validation properties related to the visible contents of the saved view are linked to the draughting_model, which must be created as a complex instance with characterized_object, using the entity type characterized_representation. Properties can be attached to this complex instance in the usual way, as shown in Figure 115 below. The characterized_object's name and description shall not be instantiated.

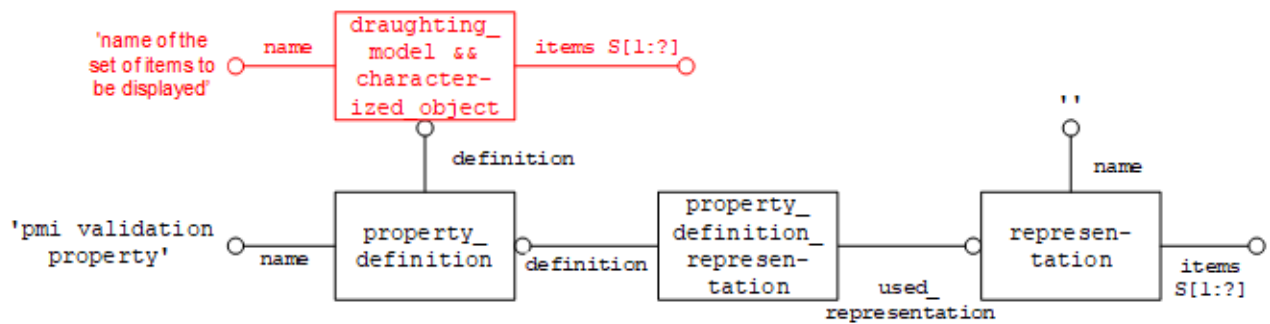


Figure 115: Defining PMI Validation Properties for the contents of a Saved View

Part21 Example

```
#100=(CHARACTERIZED_OBJECT(*,*) CHARACTERIZED_REPRESENTATION()
DRAUGHTING_MODEL() REPRESENTATION('MBD_A',(#150,#160,#170),#80));
#110=PROPERTY_DEFINITION('pmi validation property','',#100);
#120=PROPERTY_DEFINITION_REPRESENTATION(#110,#130);
#130=REPRESENTATION('',(#140),#80);
```

Note that `characterized_representation` is not in AP203 or AP214. Even though it violates a rule in EXPRESS (`characterized_object` and `draughting_model` have no common type in their inheritance tree, and thus are not allowed to be combined into a complex instance), it was agreed to use the approach with the complex entity nevertheless. This means that in #100 of the Part 21 Example above, the entry `characterized_representation` is missing. This must be supported for backwards compatibility. See [1], section 6.2, for details.

Validation properties related to the perspective of the view have to be attached to the combination of `draughting_model` and `camera_model_d3`. For this purpose, AP242 Edition 2 DIS introduced the new entity type `model_geometric_view`, which is a subtype of `characterized_item_within_representation` that restricts its `rep` and `item` attributes to reference only `draughting_model` and `camera_model` respectively. Any properties will then be attached to this entity, as shown in Figure 116 below.

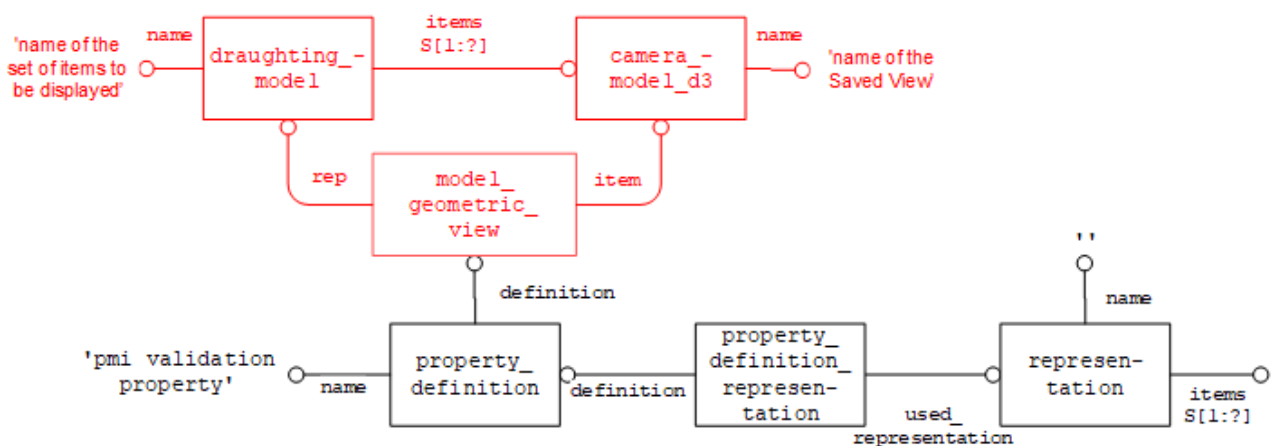


Figure 116: Defining PMI Validation Properties for the perspective of a Saved View

10.2.2.2 Validation Properties addressing Saved View Contents

To keep the documentation concise, this sections only states the type and attribute values of the `representation_items` to be included in the `representation` of the validation property as shown above in Figure 115 and Figure 116 respectively. For brevity, `rep_item` is used instead of `representation_item`.

Note: In the context of saved views, “visible” means that the referred item is included in the `draughting_model` either in its set of `items` or by means of `mapped_item` and `representation_map` (see Figure 96). It might be positioned outside of the screen area, though, and thus not actually visible to the user.

<code>rep_item.name</code>	<code>rep_item</code> subtype	Description
'number of annotations'	<code>integer_rep_item</code>	Total number of annotations (draughting callouts) visible in the Saved View.
'number of tolerance annotations'	<code>integer_rep_item</code>	The number of annotations presenting tolerance values, corresponding with the indicated PMI type per Table 18 (Section 8.4).
'number of dimension annotations'	<code>integer_rep_item</code>	The number of annotations presenting dimension values, corresponding with the indicated PMI type per Table 18 (Section 8.4).
'number of datum annotations'	<code>integer_rep_item</code>	The number of annotations presenting datum elements, corresponding with the indicated PMI type per Table 18 (Section 8.4).
'number of other annotations'	<code>integer_rep_item</code>	The number of annotations presenting other values, corresponding with the indicated PMI type per Table 18 (Section 8.4).
'visible geometry surface area'	<code>area_measure</code>	The total surface area of the model geometry visible in the saved view, not including supplemental geometry and annotations. (*)
'visible geometry curve length'	<code>length_measure</code>	The total length of independent curves visible in the saved view, not including supplemental geometry and annotations. (*)

(*): Supplemental geometry is not considered here as it is handled differently by different CAD systems, hence the results are not invariant. Annotations are not included in these properties as their geometric integrity is validated separately, see section 10.2.3 below.

Table 29: Attribute values for Validation Properties addressing Saved View Contents

10.2.2.3 Validation Properties addressing Saved View Position

As saved views are often defined to show a certain perspective on the model, it is important to validate the position of the camera. This includes the relative orientation of the camera and the model in 3D space. Section 9.4.2.6 explains how this is defined in STEP.

The camera position for a saved view will be validated by a pair of lists of points, which will test how the camera maps information from the world coordinate system to the view reference system and thus to the screen display.

The first list will represent points in the world coordinate system. These points will not consider any specific saved view information. The second list will contain the corresponding points in the projection space of the view reference system. For efficient implementation, each list is instantiated as a `coordinates_list`. The points within both lists shall be given in the same order, i.e., the third

point in the second list represents the coordinates obtained by mapping the third point of the first list from the world coordinate system into the view reference system.

It is recommended that the vertices of a 10x10x10 unit cube in the world coordinate system are used as the basis for the point generation, similar to the 'notional solids centroid' approach for assembly validation properties. These eight points will provide a common basis between parts and will eliminate the need to rely on calculations that could be different between CAD systems. These points should be consistently used even if there are outside of the camera's vision.

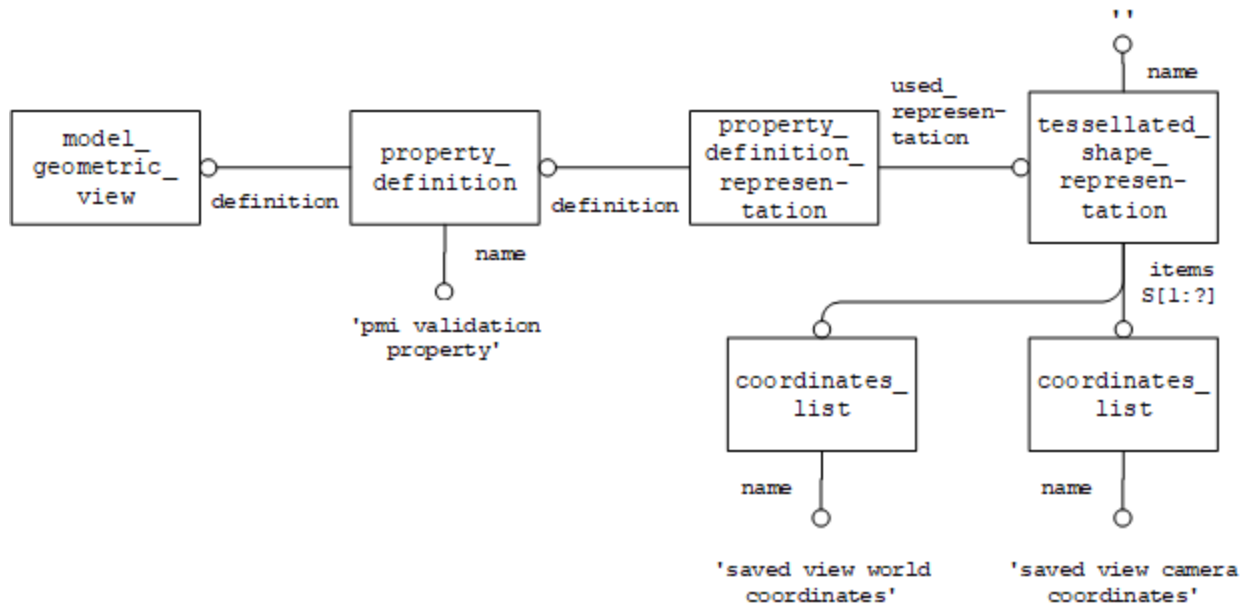


Figure 117: PMI Validation Property for Camera Position

Part 21 Example

```

#100=(CHARACTERIZED_OBJECT(*,*) CHARACTERIZED_REPRESENTATION()
DRAUGHTING_MODEL() REPRESENTATION('MBD_A',(#150,#160,#170),#80));
#170=CAMERA_MODEL_D3('MBD_A',#13955,#12);
#200=MODEL_GEOMETRIC_VIEW('','',#170,#100)
#210=PROPERTY_DEFINITION('pmi validation property','',#200);
#220=PROPERTY_DEFINITION_REPRESENTATION(#210,#230);
#230=TESSELLATED_SHAPE_REPRESENTATION('',( #240, #250),#80);
#240=COORDINATES_LIST('saved view world coordinates',8,
((0.,0.,0.),(10.,0.,0.),(10.,10.,0.),(0.,10.,0.),(0.,0.,10.),
(10.,0.,10.),(10.,10.,10.),(0.,10.,10.)));
#250=COORDINATES_LIST('saved view camera coordinates',8,
((0.,0.,0.),(0.25,0.,0.),(0.25,0.25,0.),(0.,0.25,0.),(0.,0.,0.25),
(0.25,0.,0.25),(0.25,0.25,0.25),(0.,0.25,0.25)));
    
```

10.2.2.4 Validation Properties addressing Saved View Scaling

In addition to the perspective on the model, the scaling or zoom factor is another important characteristic to validate. This determines whether the entire model or a specific detail will be shown on screen.

Based on the camera setup for a Saved View as given in section 9.4.2.6, the zoom factor for validation is defined as the ratio between the size of the view window over the distance of the camera to the viewing plane. This is illustrated in Figure 118 below:

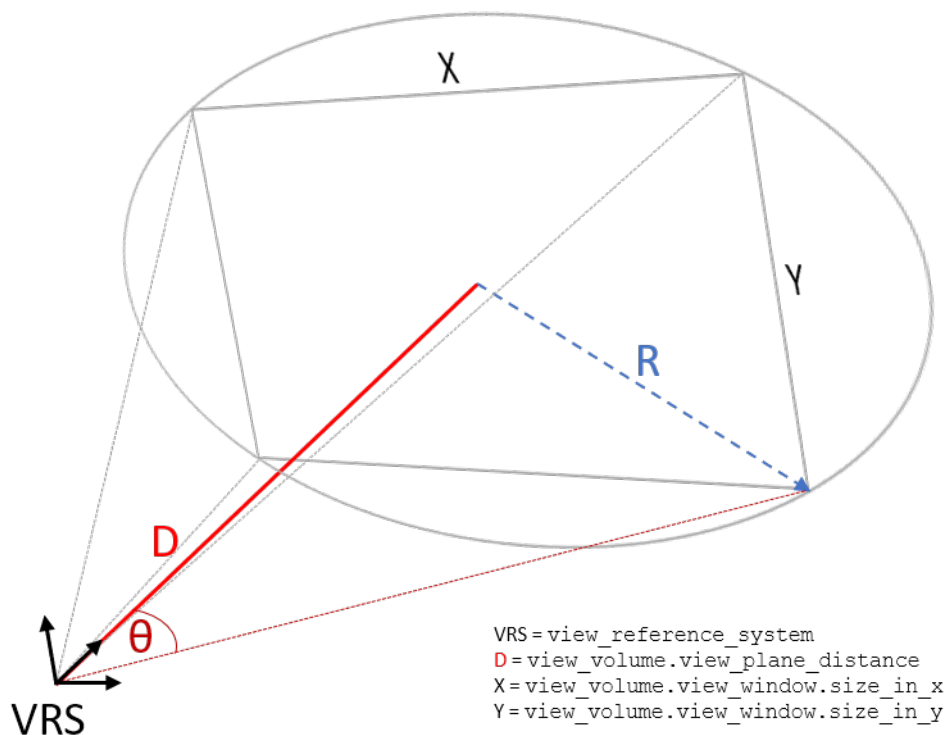


Figure 118: Determining the Zoom Factor for a Saved View

Agreement:

The zoom factor (scale) is defined by the ratio R / D , where:

- R is the radius of the circle enclosing the view window, where $R = \sqrt{X^2 + Y^2} / 2$
- D is the view plane distance
- **Scale = 100% is given at $R / D = 0.25$.**

This means the angle θ between the z axis of the view reference system and the cone defined by the origin of the view reference system and the circle enclosing the view window is 14° .

This is an arbitrary, but meaningful choice. Similar values are already used by many applications, e.g., in CATIA, a scale of 100% is defined at $\theta = 13.5^\circ$ ($R / D = 0.24$).

The instantiation of the scale validation property follows the pattern shown Figure 115 and Figure 116 respectively, with the following attribute values:

Rep_item.name	rep_item subtype	Description
'saved view scale'	real_rep_item	The scale factor " R / D " per Figure 118

Table 30: Attribute values for Validation Properties addressing Saved View Scaling

10.2.3 Validation Properties for Graphic Annotations

Because of their very nature, validation of Graphic Annotations information content is limited, since once they have been rendered, all information about their contents is lost. The validation properties provided for Graphic Presentation are therefore primarily of geometric nature. Content validation information can be supplied by using specific Unicode strings.

The anchor entity for a Graphic Annotation is the `draughting_callout`. Hence, all validation properties as far as they apply to the entire annotation, shall be attached at this level. Especially in the case when an annotation consists of several subsets, it is also possible to attach validation properties at the sub-set level, i.e., the applicable subtype of `annotation_occurrence`. If for example, a Polyline annotation is divided into two subsets, the “curve length” validation property would store the curve length for each subset at the corresponding `annotation_curve_occurrence`, while at the `draughting_callout` it would store the total curve length for both subsets.

In order to define a validation property on a `representation_item` in the context of a specific representation, the new intermediate entity `characterized_item_within_representation` was introduced with AP242 and will be used as shown in Figure 119 below.

Note that this entity type is not present in AP203 and AP214. Previously, an approach using a complex entity composed of `annotation_occurrence` and `characterized_object` was proposed, similar to the one used above to define validation properties per view. This does, however, violate the same rule in EXPRESS. See [1], section 6.3, for details.

10.2.3.1 Polyline Presentation Validation Properties

10.2.3.1.1 Polyline Curve Length

To make sure that no portions of the rendered annotation are lost, a validation property is defined which contains the total curve length, i.e., the sum of the length of all line segments and circular arcs making up the polyline annotation.

Part 21 Example

```
#100=DRAUGHTING_MODEL('', (#150,#160,#170,#180), #80);  
#150=ANNOTATION_PLANE('', (#151),#155, (#200,#220,#240));  
#200=ANNOTATION_OCCURRENCE('linear dimension', (#201),#202);  
#202=GEOMETRIC_CURVE_SET('linear  
dimension', (#206,#207,#208,#209));  
#205=CHARACTERIZED_ITEM_WITHIN_REPRESENTATION('', '#200,#100);  
#210=PROPERTY_DEFINITION('pmi validation property', '#205);  
#211=PROPERTY_DEFINITION_REPRESENTATION(#210,#212);  
#212=REPRESENTATION('', (#213), #80);  
#213=MEASURE_REPRESENTATION_ITEM('polyline curve length',  
POSITIVE_LENGTH_MEASURE(25.4), #50);
```

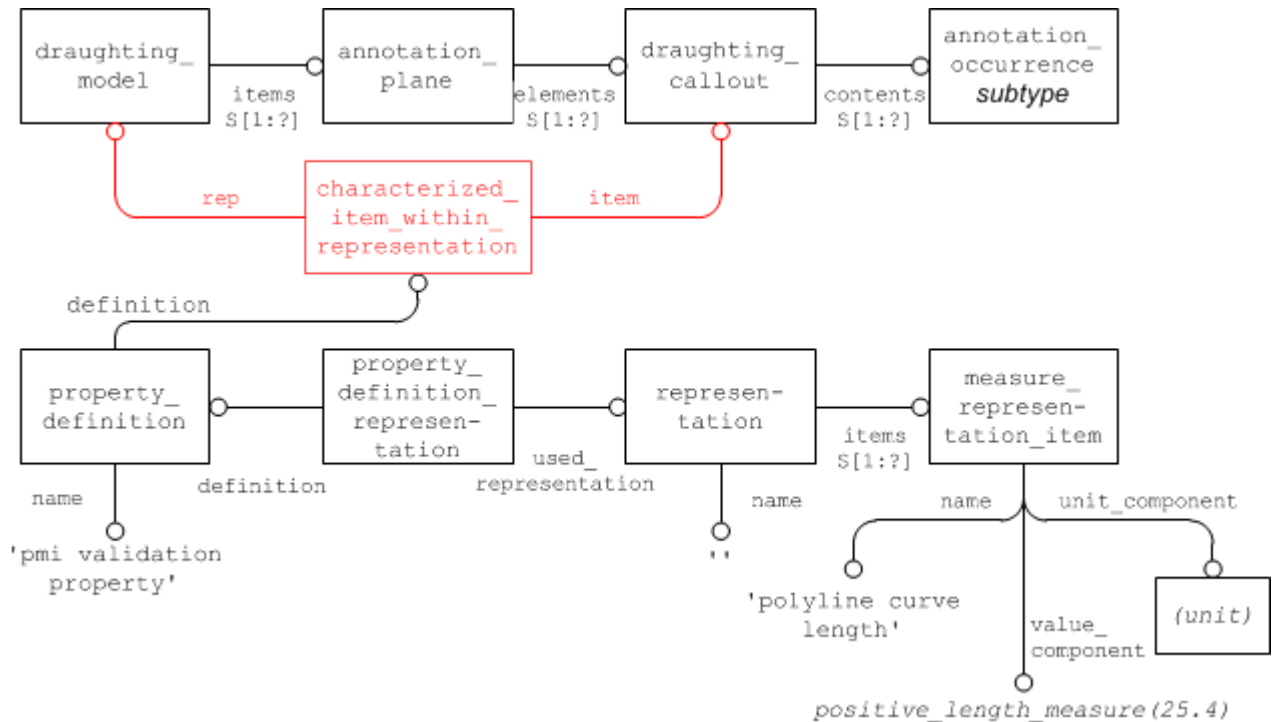


Figure 119: PMI Validation Property for Polyline Curve Length

10.2.3.1.2 Polyline Centroid

In order to verify the positioning of the Polyline annotation, a centroid shall be calculated for it, based on the following algorithm:

- Each Polyline annotation consists of line segments and circular arcs.
- The “centroid” of a line segment is the center point of the line.
- The “centroid” of a circular arc is on the radius joining the center of the arc at the position

$$p = \frac{radius * \sin(\frac{arc_angle}{2}) * 2}{arc_angle}$$

- For a set of line segments and arcs, the “centroid” is arrived at by a composition of all the element centroids, with the length of each line segment or arc as weight (similar as for a set of solids or surfaces).

Note that since the lengths of the line segments and arcs are used as weights to compose the Polyline centroid, calculating the Polyline Curve Length and the Polyline Centroid validation property at the same time is very efficient.

The approach and file structure used will be similar to the one defined in Section 10.2.3.1 for the Polyline Curve Length, with the difference that the item contained in the representation will be a `cartesian_point`, the name of which shall be ‘polyline centre point’:

Attribute	Recommended value
<code>property_definition.name</code>	'pmi validation property'
<code>representation.name</code>	"
<code>cartesian_point.name</code>	'polyline centre point'

Table 31: Attribute values for the 'polyline centroid' PMI Validation Property

10.2.3.2 Tessellated Presentation Validation Properties

The implementation structure for Tessellation Presentation validation properties equals those for Polyline Presentation. Depending on whether the `tessellated_geometric_set` (see Figure 82 in section 8.2) contains curves or surfaces, different validation properties apply:

- Tessellated curves: Number of Segments, Tessellated Curve Length, Centroid
- Tessellated surfaces: Number of Facets, Tessellated Surface Area, Centroid

Of course, a `tessellated_geometric_set` can contain both types of geometry, e.g., when a feature control frame with filled font text is presented. In this case, all the properties listed above apply, with a combined centroid.

More details on Tessellated Geometry and the corresponding validation properties are described in the Recommended Practices for 3D Tessellated Geometry.

Tessellated Presentation validation properties shall be attached to:

- The `draughting_callout`, with values corresponding to the entire annotation
- The `tessellated_annotation_occurrence`, in case annotation subsets are defined.

All validation properties in this section follow the pattern defined in Figure 119, which is therefore not repeated here.

Note that in all cases, the name of the `property_definition` is 'pmi validation property', and not 'tessellated validation property', which gives a clear distinction between validation properties applicable to the part shape and those applicable to annotations.

10.2.3.2.1 Number of Segments

All tessellated geometry is comprised of a number of basic geometric objects. In the case of curves or wires, these are represented by a set of connected line segments. The number of segments in every curve or wire is invariant and can therefore be used as a validation property.

Attribute	Recommended value
<code>property_definition.name</code>	'pmi validation property'
<code>representation.name</code>	"
<code>integer_representation_item.name</code>	'number of segments'
<code>integer_representation_item.the_value</code>	<i>(number of segments)</i>

Table 32: Attribute values for the 'number of segments' PMI Validation Property

10.2.3.2.2 Tessellated Curve Length

The total length of all segments in a tessellated curve or curve set can be validated to make sure the information was not lost during transfer. It is easily calculated by summing up the lengths of the individual straight segments.

Attribute	Recommended value
<code>property_definition.name</code>	'pmi validation property'
<code>representation.name</code>	"
<code>measure_representation_item.name</code>	'tessellated curve length'
<code>measure_representation_item.value_component</code>	<i>(positive_length_measure(value))</i>

Table 33: Attribute values for the 'tessellated curve length' PMI Validation Property

10.2.3.2.3 Tessellated Curve / Surface Centroid

A centroid is the center of a geometric extent. In the case of Tessellated Presentation, this extent can be defined by a surface (where the centroid is the balance point), or line segment (where the centroid is the center point of the segment). For a set of line segments, the centroid is arrived at by a composition of all the element centroids, with the length of each line segment as weight (similar as for a set of surfaces).

Since combining the centroids of different classes of geometry (surfaces and curves) into one point can lead to mismatches upon evaluation, it was agreed to keep the centroids separate and actually define two points, one for the surface content and one for the curve content. Of course, each point shall be defined only if the corresponding class of geometry is used in the respective annotation.

Note that since the lengths of the line segments and the areas of the surfaces are used as weights to compose the centroid, calculating the Tessellated Curve Length, Tessellated Surface Area and the Centroid validation property at the same time is very efficient.

Attribute	Recommended value
property_definition.name	'pmi validation property'
representation.name	"
cartesian_point.name	'tessellated surface centre point'
cartesian_point.name	'tessellated curve centre point'

Table 34: Attribute values for the 'tessellated centroid' PMI Validation Property

10.2.3.2.4 Number of Facets

All tessellated geometry is comprised of a number of basic geometric objects; in the case of surfaces, these facets are typically triangles. In contrast to exact geometry with topology, in tessellated geometry the number of elements in a body is invariant and can therefore be used as a validation property.

Attribute	Recommended value
property_definition.name	'pmi validation property'
representation.name	"
integer_representation_item.name	'number of facets'
integer_representation_item.the_value	<i>(number of facets)</i>

Table 35: Attributes values for the 'number of facets' PMI Validation Property

10.2.3.2.5 Tessellated Surface Area

For tessellated geometry, calculation of this value is done by simply summing up the individual area values of all facets contained in the surface set of annotation the validation property is defined for.

Attribute	Recommended value
property_definition.name	'pmi validation property'
representation.name	"
measure_representation_item.name	'tessellated surface area'
measure_representation_item.value_component	<i>(area_measure(value))</i>

Table 36: Attribute values for the 'tessellated surface area' PMI Validation Property

10.2.3.3 General Graphic Presentation Validation Properties

This section contains definitions of validation properties that apply to all kinds of Graphic Presentation.

10.2.3.3.1 Equivalent Unicode String

As PMI data, once rendered into Polylines, is no longer directly machine-readable, a means for validation of the displayed contents is required especially in the context of long-term archiving. Thence, an “equivalent Unicode string” validation property is introduced to support the following validation process:

- A PMI element is converted into a Unicode string. This conversion is independent from the designing CAD system and also the data exchange standard used.

Refer to the “**Unicode String Specification**” (Revision J) for the definition of the Unicode strings. It can be found on the CAX-IF web sites under “Joint Testing Information”:

http://www.cax-if.de/documents/rec_prac_unicode_strings_rev_j_2011-05-25.pdf

- The resulting string will be included as a validation property, typically at the `draughting_callout` for the PMI element as whole. In case the PMI element is split into several subsets (see section 7.2.5), a Unicode string can in addition be linked to each of the corresponding `annotation_occurrence` subtypes and shall contain the equivalent of what is contained in the respective subset.
- To validate the contents, character recognition software will be applied to the Polyline data, and its output will be compared to the Unicode string(s).
- In order to provide additional information to the character recognition software to achieve better results, it is recommended to also include the font name as defined in the source CAD system for that annotation.

The implementation in STEP is similar to 10.2.3.1 and 10.2.3.1.2; with a `descriptive_representation_item` having a name of ‘equivalent unicode string’, and the description attribute containing the Unicode string.

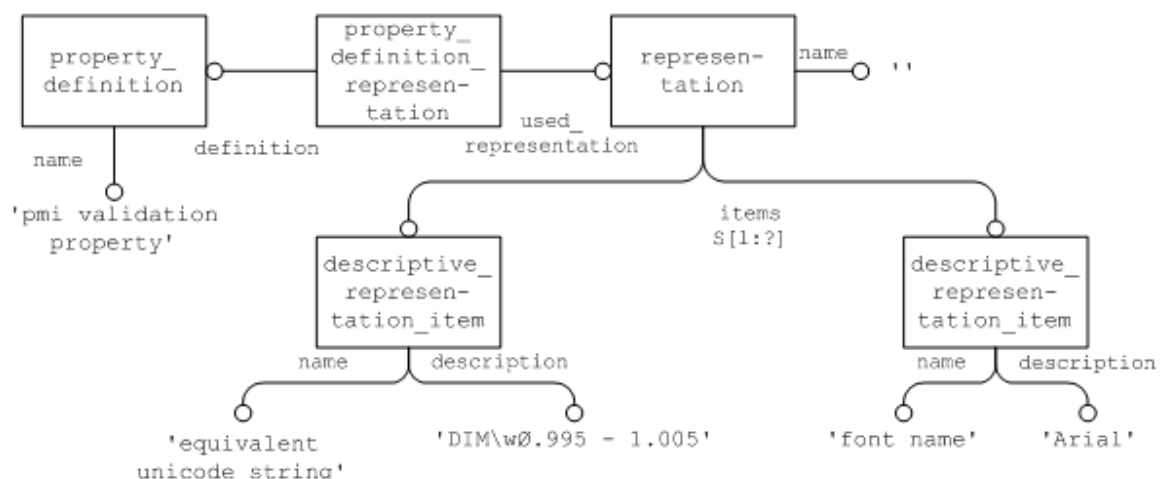


Figure 120: Equivalent Unicode String validation property

Note that discussions concerning this property are still ongoing. Since it is possible to include the information presented as Polylines also in intelligent form as Representation entities, it is for instance unclear how to handle the case where the Representation data and the information given in the equivalent Unicode string don’t match.

10.2.3.3.2 Affected Geometry

In addition to validation that the contents are complete, it is also an important of the PMI definition to which elements in the model a PMI statement applies. Since there are a number of examples where the topologic definition of the geometry changes during the conversion via STEP (the most popular example being a cylinder becoming split into two half-cylinders), it is important to provide a means of validating that the geometry affected by a PMI statement altogether remains unchanged.

Depending on the type of the underlying PMI statement, the “affected geometry” validation property will transfer either:

- the total surface area for PMI associated with faces (e.g., affected by a flatness tolerance)
- the total curve length for PMI associated with curves (e.g., a dimension).

The STEP file structure to define this validation property is the same as given in 10.2.3.1.1 for the Validation Property “Polyline Curve Length”, only that the name of the `measure_representation_item` shall be either 'affected area' or 'affected curve length'.

Notes: PMI Annotations can be attached to elements of Supplemental Geometry as well, for instance a reference plane (see corresponding Recommended Practices). The link between an annotation and supplemental geometry works in the same way as between an annotation and part geometry described in section 9.3.1 above.

In some CAD systems, reference planes and axes are defined as unbounded (infinite) elements. In such a case, the “affected geometry” validation property shall not be applied since it would not render meaningful results.

There are two scenarios: the elements are unbounded in the exporting system; then, the validation property shall not be created in the STEP file; second, the exporting system has bounded elements, hence creates the validation property in the file, but the importing system uses unbounded elements and discards the boundaries defined in the file, then it shall not evaluate the validation property.

Note that his validation property is also applicable to Semantic Presentation, but the corresponding STEP structure has not yet been defined.

10.2.3.3.3 Number of Linked Annotations

Section 9.3.3.1 described how to link different annotations together using `draughting_callout_relationship`. As these links provide information about a datum being linked to a feature control frame, a validation is defined to capture these.

The STEP file structure to define this validation property is the same as given in 10.2.3.2.1 for the number of tessellated segments, only that the name of the `integer_representation_item` shall be 'number of linked annotations'.

The count shall be done on both ends, i.e., the `relating_draughting_callout` as well as the `related_draughting_callout`. Hence, if the overall sum of all values of this validation property across the part is not even, this is an indication for inconsistent data.

10.3 Combining PMI Validation Properties for Efficient Implementation

Each of the PMI Validation Properties described above follows the exact same pattern for its definition: `property_definition ← property_definition_representation → representation → representation_item`. In a larger file, where there are many validation properties – especially if there are many PMI annotations, each with its own set of properties – this can result in a significant number of entities, especially representations, which may have an impact on system performance.

Hence it was agreed that under specific circumstances, multiple validation properties can be combined so they share the same `property_definition`, `property_definition_representation` and `representation`. The resulting structure is illustrated in Figure 121.

Validation properties can be combined in this way, if they are:

- of the same type (`property_definition.name`)
- attached to the same model element (`property_definition.definition`)

Note that the `representation.name` must be empty. The individual validation properties can be distinguished by their respective `representation_item.name`. Since each validation property is instantiated at most once per model element, this does not introduce any ambiguities.

Even though the example in Figure 121 is for Graphic PMI Presentation Validation Properties, the approach applies in exactly the same way for their Semantic PMI Representation counterparts.

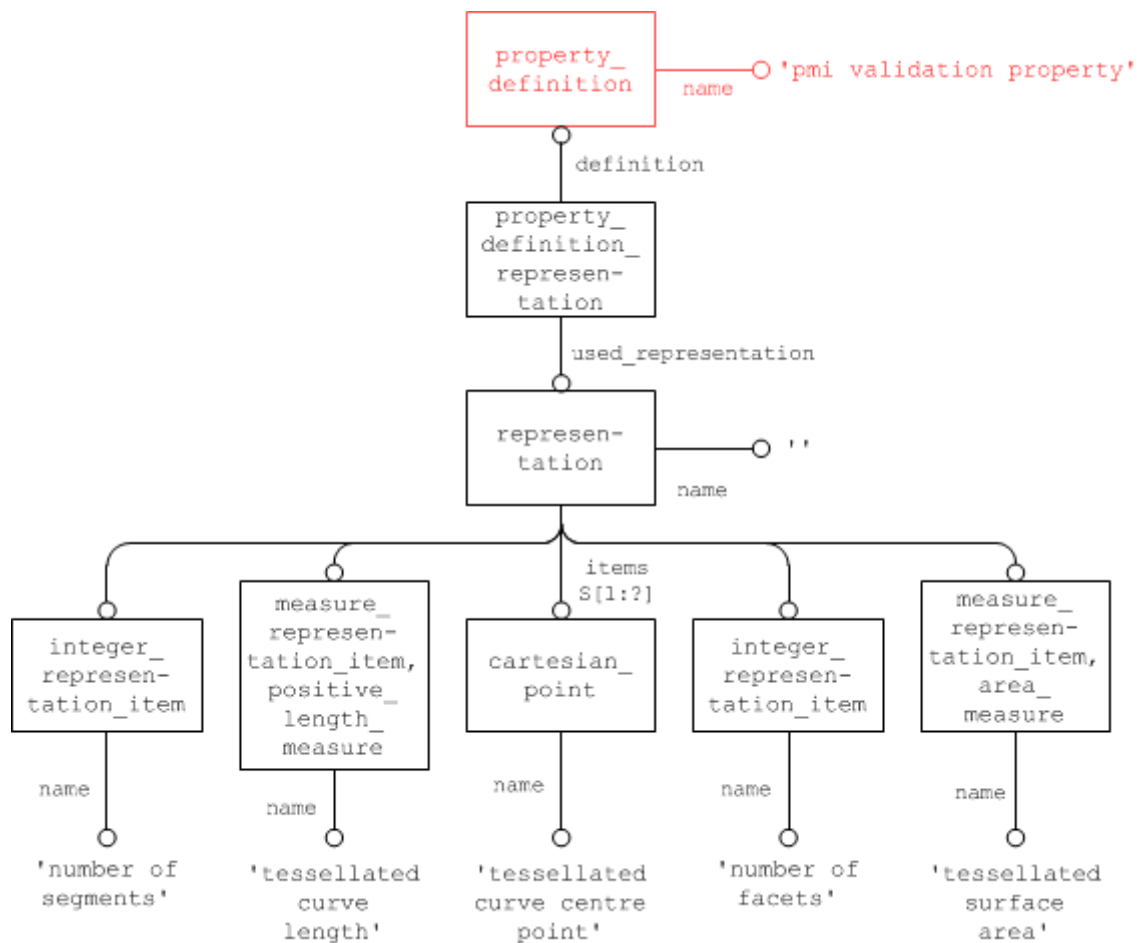


Figure 121: Combining several Validation Properties in one property_definition

Part 21 Example

```
#100=DRAUGHTING_MODEL('', (#150,#160,#170,#180), #80));  
#150=ANNOTATION_PLANE('', (#151), #155, (#200,#220,#240));  
#200=TESSELLATED_ANNOTATION_OCCURRENCE('linear  
dimension', (#201), #202);  
#205=CHARACTERIZED_ITEM_WITHIN_REPRESENTATION('', '', #200, #100);  
#210=PROPERTY_DEFINITION('pmi validation property', '', #205);  
#211=PROPERTY_DEFINITION_REPRESENTATION(#210, #212);  
#212=REPRESENTATION('', (#213, #214, #215, #216, #217), #80);  
#213=INTEGER_REPRESENTATION_ITEM('number of segments', 42);  
#214=MEASURE_REPRESENTATION_ITEM('tessellated curve length',  
POSITIVE_LENGTH_MEASURE(25.4), #50);  
#215=CARTESIAN_POINT('tessellated curve centre point',  
(2.4185923, 0.0582896, 12.492895));  
#216=INTEGER_REPRESENTATION_ITEM('number of facets', 17);  
#217=MEASURE_REPRESENTATION_ITEM('tessellated surface area',  
AREA_MEASURE(47.168146), #51);
```

10.4 PMI Validation Properties Attribute Summary

The following tables summarize the attribute values for all PMI validation properties defined above.

Note: The value of `integer_representation_item` always must be written as a REAL number, i.e., with trailing decimal point.

- In general, values of type INTEGER are represented in a Part 21 file as integers, i.e., no decimal point. The case of `integer_representation_item`, however, is special. `integer_representation_item` is a subtype of `int_literal`, which is a subtype of `literal_number`. The latter defines the attribute `the_value` as of type NUMBER; `int_literal` then re-declares that to restrict it to INTEGER. Part 21 defines that in the case of a re-declared attribute, the original (more generic) type shall be used for implementation, here: NUMBER. And NUMBER maps to REAL in Part 21, hence the decimal point.
- For compatibility with existing data, `integer_representation_item` values without decimal point shall be supported as well on import.

Validation Property	property_definition.name	property_definition.definition	representation_item.name and type
Total Number of Semantic PMI Elements	'pmi validation property'	product_definition_shape	'number of semantic pmi elements' integer_rep_item
Total Number of Dimensional Locations	'pmi validation property'	product_definition_shape	'number of dimensional locations' integer_rep_item
Total Number of Dimensional Sizes	'pmi validation property'	product_definition_shape	'number of dimensional sizes' integer_rep_item
Total Number of Geometric Tolerances	'pmi validation property'	product_definition_shape	'number of geometric tolerances' integer_rep_item
Total Number of Composite Tolerances	'pmi validation property'	product_definition_shape	'number of composite tolerances' integer_rep_item
Total Number of Datums	'pmi validation property'	product_definition_shape	'number of datums' integer_rep_item
Total Number of Datum Targets	'pmi validation property'	product_definition_shape	'number of datum targets' integer_rep_item
Number of Linked PMI Presentation Elements	'pmi validation property'	dimensional_location dimensional_size datum placed_datum_target_feature geometric_tolerance	'number of PMI presentation elements' integer_rep_item
Equivalent Unicode String	'pmi validation property'	dimensional_location dimensional_size datum placed_datum_target_feature geometric_tolerance	'equivalent unicode string' descriptive_rep_item

Validation Property	property_definition.name	property_definition.definition	representation_item.name and type
Affected Geometry	'pmi validation property'	dimensional_location dimensional_size datum placed_datum_target_feature geometric_tolerance	'affected area' area measure <i>or</i> 'affected curve length' positive_length_measure
List of Datum References	'pmi validation property'	geometric_tolerance	'datum reference' descriptive_rep_item

Table 37: Summary of Semantic PMI Representation Validation Property Attributes

Validation Property	property_definition.name	property_definition.definition	representation_item.name and type
Total Number of Annotations per Part	'pmi validation property'	product_definition_shape	'number of annotations' integer_rep_item
Total Number of Views per Part	'pmi validation property'	product_definition_shape	'number of views' integer_rep_item
Number of Annotations per Saved View	'pmi validation property'	draughting_model && characterized_repres.	'number of annotations' integer_rep_item
Number of Tolerance Annotations per Saved View	'pmi validation property'	draughting_model && characterized_repres.	'number of tolerance annotations' integer_rep_item
Number of Dimension Annotations per Saved View	'pmi validation property'	draughting_model && characterized_repres.	'number of dimension annotations' integer_rep_item
Number of Datum Annotations per Saved View	'pmi validation property'	draughting_model && characterized_repres.	'number of datum annotations' integer_rep_item
Number of other Annotations per Saved View	'pmi validation property'	draughting_model && characterized_repres.	'number of other annotations' integer_rep_item
Surface area of model geometry visible in a Saved View	'pmi validation property'	draughting_model && characterized_repres.	'visible geometry surface area' surface_area_measure
Curve length of model geometry visible in a Saved View	'pmi validation property'	draughting_model && characterized_repres.	'visible geometry curve length' length_measure
Saved View Camera Position	'pmi validation property'	model_geometric_view → camera_model_d3	'saved view world coordinates' coordinates_list
Saved View Camera Position	'pmi validation property'	model_geometric_view → camera_model_d3	'saved view camera coordinates' coordinates_list
Saved View Camera Scale	'pmi validation property'	model_geometric_view → camera_model_d3	'saved view scale' real_rep_item

Validation Property	property_definition.name	property_definition.definition	representation_item.name and type
Polyline Curve Length	'pmi validation property'	characterized_item_within_rep → draughting_callout	'polyline curve length' positive_length_measure
Polyline Centroid	'pmi validation property'	characterized_item_within_rep → draughting_callout	'polyline centre point' cartesian_point
Tessellated Number of Segments	'pmi validation property'	characterized_item_within_rep → draughting_callout	'number of segments' integer_rep_item
Tessellated Curve Length	'pmi validation property'	characterized_item_within_rep → draughting_callout	'tessellated curve length' positive_length_measure
Tessellated Curve Centroid	'pmi validation property'	characterized_item_within_rep → draughting_callout	'tessellated curve centre point' cartesian_point
Tessellated Surface Centroid	'pmi validation property'	characterized_item_within_rep → draughting_callout	'tessellated surface centre point' cartesian_point
Tessellated Number of Facets	'pmi validation property'	characterized_item_within_rep → draughting_callout	'number of facets' integer_rep_item
Tessellated Surface Area	'pmi validation property'	characterized_item_within_rep → draughting_callout	'tessellated surface area' area_measure
Equivalent Unicode String	'pmi validation property'	characterized_item_within_rep → draughting_callout	'equivalent unicode string' descriptive_rep_item
Equivalent Unicode String – OCR Font	'pmi validation property'	characterized_item_within_rep → draughting_callout	'font name' descriptive_rep_item
Affected Geometry	'pmi validation property'	characterized_item_within_rep → draughting_callout	'affected area' area_measure or 'affected curve length' positive_length_measure
Number of linked Annotations	'pmi validation property'	characterized_item_within_rep → draughting_callout	'number of linked annotations' integer_rep_item

Table 38: Summary of Graphic PMI Presentation Validation Property Attributes

Annex A Referenced Documents

The following documents are referenced throughout this document. They are available on the MBx-IF homepages at www.mbx-if.org under “CAX → Rec. Practices”:

- [1] “Recommended Practices for PMI Polyline Presentation (AP203/AP214)” – Version 2.3; 13 October 2014.
- [2] “PMI Unicode String Specification” – Version 1.0; 25 April 2023

Additional information on the AP242 and its capabilities can be found on www.ap242.org.

Annex B Definitions of Terms for PMI in CAX-IF / LOTAR

The following section provides a harmonized definition of PMI-related terms as they are understood and used within the CAX-IF and LOTAR projects.

B.1 Product and Manufacturing Information (PMI)

Product and Manufacturing Information (PMI) is used in 3D Computer-aided Design (CAD) systems to convey information about the definition of a product’s components for manufacturing, inspections and sustainment, which supplements the geometric shape of the product. This includes – but is not limited to – data such as dimensions, tolerances, surface finish, weld symbols, material specifications, 3D annotations and user defined attributes. The term PMI, used by itself, relates to a certain information content within a product definition, i.e., it indicates what information is being stored, independent from how it is being stored.

Though PMI is generally accepted to be the generic designation, the term Geometric Dimensions and Tolerances (GD&T; sometimes also listed as Geometric Dimensioning and Tolerancing) is often used synonymously, as it is the main type of PMI that is currently in focus. Other synonymously used terms are: General Tolerances and Annotations, Annotation, Smart Dimensions, Functional Tolerancing and Annotation (FT&A) or Geometric Product Specification (GPS). Some of these are specific to a particular CAD system. Industry standards for defining PMI include standards such as ASME Y14.5, ASME Y14.41 and ISO 1101, ISO 16792 respectively.

B.1.1 Geometric Dimensions & Tolerances (GD&T)

Geometric Dimensions & Tolerances (GD&T) are a type of Product and Manufacturing Information (PMI) that can be either computed automatically by a CAD system or entered manually by the user. The definitions below are additions to the terms mentioned in section 3.6 of EN/NAS9300-100:

- ***Explicit Tolerance:*** Any tolerance with a stated (numeric) value, regardless of how or where it is applied. Explicit tolerances can be applied through general notes, flag notes, PMI or tolerance dimensions. This must be attributable to a specific feature, feature set and/or datum reference (e.g., position, orientation). Standard +/- .03 notes may be explicit, depending on their use.
- ***Implicit Tolerance:*** Any tolerance where there is no stated value and acceptability of the feature is defined by engineering to be through visual comparison to the appearance in the CAD model. Standard +/- .03 notes may also be implicit, depending on their use.
- ***Explicit Dimension:*** The required nominal value is stated in the CAD model so that it can be obtained without interrogation.
- ***Implicit Dimension:*** The nominal value can only be obtained by interrogation (i.e., feature to feature measuring) of the CAD model.

B.2 Semantic Representation

Semantic Representation designates a certain way how information is being stored; it does not relate to the information content itself. Semantic Representation captures the meaning (intent) and relationships (context) of a character, word, phrase, sentence, paragraph, specification, or symbol without using any of the visual characters or constructs that are needed for a human to understand it – such as the letters, graphical symbols, lines and arrows used on engineering drawings.

The main purpose of Semantic Representation is to facilitate automated consumption of the data, e.g., for later re-use or for downstream applications. It applies to various types of data, such as PMI, Composite Material Definition, and others.

Example – The Semantic Representation of a Linear Dimension includes all of the information needed to understand the specification (the type of dimension, between which features it is defined...), without any of the graphic components such as dimension lines and extension lines, their direction, arrowheads and the dimension value.

B.3 Presentation

Presentation designates a certain way how information is being stored; it does not relate to the information content itself. Presentation defines the visual representation of a character, word, phrase, sentence, paragraph, specification, or symbol in way that is understandable by humans. Presentation is a generic term that applies to any form of human-readable information transfer; this can for instance be a handwritten note, an engineering drawing, or the display of a 3D CAD model on a computer screen.

The main purpose of Presentation is to facilitate human comprehension of the data, e.g., to manufacture, inspect, assemble or maintain the product described by the data. For a correct interpretation of the presented data, it is required that the reader is familiar with the alphabet used and the general type of information being presented.

In the context of 3D CAD, the term Presentation relates to elements that are visible in the display of a 3D model and are either located (positioned) in 3D space, i.e., they rotate and move with the model, or in a fixed 2D plane. Elements of Presentation can typically be styled (e.g., colored), organized (e.g., in specific views), and associated with other elements of the model. Presented types of data typically are geometry (3D shapes, surfaces, curves, points) and characters (letters, numbers, symbols).

B.3.1 Character-based Presentation

Character-based Presentation is a type of Presentation where the conveyed information is stored as characters (letters, numbers, and symbols). These characters are typically stored in a string variable that can be retrieved and edited in a consuming application. The appearance of Character-based Presentation depends on the font being used and may change if the originating system and the consuming application use different fonts. To ensure no characters are lost from creation to consumption, the alphabet (character encoding) used must be defined as well.

Example – In ASCII, the letter 'A' is stored as character code '0x41' (hexadecimal).

Character-based Presentation is often supplemented by geometric elements, such as leader lines, curves or terminator symbols.

B.3.2 Graphic Presentation

Graphic Presentation is a type of Presentation where the conveyed information is converted to geometric elements (lines, arcs, surfaces) by the source system in a way that preserves the exact appearance (color, shape, positioning) of the presented information. The arrangement of these geometric elements can be interpreted by a competent human by looking at them, while the information content is no longer directly computer accessible.

Example – A simple graphic presentation of the letter ‘A’ is given by three straight lines. A more complex graphic presentation could have ten straight lines and six circular arcs but would still be recognizable as an ‘A’ to a human familiar with the Latin alphabet. In both cases, a computer can only access the geometric definition of the individual elements (start and end coordinates for each line), but not the fact that it is the letter ‘A’ that is being presented.

Graphic Presentation does not require defining the font or alphabet (character encoding) originally used in the creation of the presented data. In the way Graphic Presentation data is stored, there is typically no distinction between geometric elements that are visual representations of characters, and geometric elements that are visual representations of other constructs, such as leader lines, curves or terminator symbols.

Note – An indirect way of accessing the information content stored as Graphic Presentation is the application of character recognition software that will attempt to identify the original characters from the geometric elements that make up their visual representation. Character recognition, however, has its limitations depending on the algorithms used, the fonts and alphabet involved, and the granularity of the Graphic Presentation geometry elements. Its results cannot be used with the same level of reliability as Character-based Presentation.

B.3.2.1 Polyline Presentation

Polyline Presentation designates a specific implementation form of Graphic Presentation that is supported by many STEP Application Protocols, including AP203e2 (ISO10303-203:2011), AP214e3 (ISO10303-214:2010) and AP242 (ISO10303-242:2020). It supports all the characteristics of Graphic Presentation. A Polyline is defined as an ordered list of 3D points, which are consecutively connected by straight line segments. Circles and circular arcs are the only other allowed geometric elements and can be used in combination with Polylines. Filled areas can be defined with the elements above as boundaries.

B.3.2.2 Tessellated Presentation

Tessellated Presentation designates a specific implementation form of Graphic Presentation that has been introduced during the development of STEP AP242 (ISO10303-242:2020). It supports all the characteristics of Graphic Presentation. It is based on data model for tessellated geometry and provides more efficient ways of storing the data, compared to Polyline Presentation. It supports curves (composed of straight-line segments) and surfaces (composed of triangles).

Annex C Availability of implementation schemas

C.1 AP242

The longform EXPRESS schemas of published editions of AP242 are publicly available on the MBX-IF homepage under “Resources → EXPRESS Schemas”:

- <https://www.mbx-if.org/home/mbx/resources/express-schemas/>

Development EXPRESS schemas supporting the latest capabilities in scope of CAx-IF testing will be shared within the team on the Nextcloud platform.

C.2 AP203/AP214

The capabilities as described in this document fully supported only by AP242.

While AP203 2nd Edition and AP214 3rd Edition provide some support for Semantic PMI Representation, the limitations of these data models were deemed to be too restricting. Thus, it was agreed that Semantic PMI Representation will be supported by the CAx-IF only for AP242.

AP203 Ed.2 and AP214 Ed.3 do support Polyline Presentation, but there are some significant implementation differences, hence this is described in a separate document, the “CAx-IF Recommended Practices for Polyline Presentation”, Version 2.0 or later.

Annex D Mapping of Saved Views

The following section provides an overview at a user-interface level on how the respective native CAD constructs can be mapped to and from a STEP Saved View (see section 9.4.2), considering the standardized definition.

The descriptions currently include Dassault Systèmes' CATIA V5/V6, Siemens' NX and PTC's Creo (previously Pro/Engineer) and can be extended to cover further systems in the future if needed.

Data Format	STEP AP 203e2, 214e3 & 242	CATIA V5/V6 (Dassault Systèmes)	NX (Siemens)	Pro/Engineer, Creo (PTC)
View Designation	Draughting Model with included Camera Model	View Annotation Plane Capture	Model View Camera	Combined States Views + Layers
Associated Data		Name of the camera	Drawing Reference x,y,z Vector	
	View Reference System	Point of view	Perspective Distance	Position (horizontal / vertical)
	Camera Model View Window View Volume	3D Shape orientation	Camera: - Camera Name - Camera Point - Target Point - Target Matrix - Magnification	Spin x,y,z
	View Plane Distance	Zoom factor	Display Scale	Zoom factor
	Draughting Model	Active View state		
	Camera Model Name	View Name String	View Name String	View Name String
Differences	Views are created by a combination of Draughting Model and Camera Model. The DM controls visibility of elements (PMI and geometry), the CM controls model orientation and zoom factor.	Views can be stored as "Annotation Views" or as "Capture Views". Specific PMI can be associated with both types. Captures can be associated with cameras, Annotation Views cannot.	There are Model Views and Cameras, which are both automatically created. In all camera positions all PMI are visible. Other cameras can be created by the user.	Only Views can be created. In contrast to other systems, the Views are not shown in the model tree. The PMI are not directly associated with the views; the association is done using Layers. Combined States are used to combine Views and Layers, hence PMI.

Table 39: General Overview on Views in STEP and major CAD systems

Remarks concerning CATIA V5/V6

When translating data from CATIA V5/V6 to STEP it is important to note that in CATIA, there are two constructs which can be mapped to saved views: Captures and Views/Annotation Planes.

When creating PMI (or annotations in general) in CATIA, each PMI belongs to one View, and one View only (the one active during the PMI creation). Views/Annotation Planes are specified around the geometry for automated generation of views, sections and cuts (with a 2D drawing in mind), i.e., each annotation is either on the associated annotation plane, or parallel to it.

Each PMI may belong to 0,1 or N Captures. Displaying a tolerance capture means showing annotations and/or annotation planes (hence all annotations associated with that annotation plane) according to a specific context. The user can record what is shown/not shown in the capture and can also define a point of view by associating a camera.

Views/Annotation Planes and Captures both can define section cut views by associating clipping planes.

Captures can be mapped to a fully defined Saved View (and vice versa), which also satisfies the definition per ISO 16792. This is the recommended approach.

Views/Annotation Planes can also be mapped to Saved Views but provide only a partial specification since a camera definition is missing. This means in STEP that the `draughting_model` could be fully populated but would miss a `camera_model_d3`. The definition of Annotation Plane renders a “view axis” (the normal vector of the plane) which could be used to “guess” a view point on that view axis, but as a result the zoom factor in STEP will almost always be different than in the native CATIA model, or the model is even seen as from behind.

On import into CATIA, the general approach is to automatically create an annotation plane for each annotation; i.e., in a CATIA – STEP – CATIA round-trip, the number and setup of Views/Annotation Planes will be different in the resulting model compared to the original model, but the Captures (visible elements, orientation, naming) should be preserved.

Remarks concerning NX

A set of standard Model Views (“Back”, “Front”, “Bottom”, “Isometric”, “Trimetric”, “Left”, “Right”, “Top”) is automatically created in NX when creating a part. These names cannot be changed, but additional model views can be created interactively, with user-defined names.

The camera is defined by the zooming and rotating the model to the desired position and saving the model view. NX will automatically add the camera to the model view. The camera handle can be selected and moved in space to setup an eye direction.

When PMIs are created, they are by default associated with the Model View that is currently set as active and will be visible in this view only.

Remarks concerning Creo / Pro/Engineer

In Creo and Pro/Engineer, two data structures need to be combined to generate a Saved View: Views and Layers:

- A View controls how the model is displayed, i.e., model orientation and zoom factor.
- Layers control which elements of the model (geometry, annotations...) are visible.

The View Manager in Creo / Pro/Engineer allows defining Combined States, which are composed of two or more display state elements such as Model orientation, Model style, Cross section, Layer state, and others.

This means that geometry and PMI (annotations in general) will be assigned to layers, and the layer state defines which of these are visible. This will then be stored in a Combined State, that also includes a view for orientation and zoom facture and can be given a user-defined name. The mapping of the layer approach to the `draughting_model` used in STEP is defined in section 9.4.2 under “Definition of the geometry to be displayed”.