



**Test Suite for the  
CAX Implementor Forum  
Round 43J**

September 2018 – March 2019

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## Document History

| Release | Date       | Change                  |
|---------|------------|-------------------------|
| 1.0     | 2018-12-20 | Initial Release         |
| 1.1     | 2019-02-07 | Updates to SP7 and PDM2 |
|         |            |                         |

# 1 Introduction

This document describes the suite of test cases to be used for the forty-third round of testing in the Mechanical CAD domain of the CAX Implementor Forum (CAX-IF). The CAX-IF is a joint testing forum, organized and facilitated by AFNeT, PDES, Inc., and the prostep ivip Association. The test rounds of the CAX-IF concentrate primarily on testing the interoperability and compliance of STEP processors based on AP242.

The test rounds in general combine testing of synthetic and production models. Production models will in most cases be provided by the member companies of the organizations AFNeT, PDES, Inc., and prostep ivip Association. When production models are not available from the member companies, “production-like” models will be solicited from the various CAX-IF participants.

This test suite includes synthetic models for testing the following capabilities: Product Manufacturing Information (PMI), both as Graphic Presentation and as Semantic Representation, 3D Tessellated Geometry, Composite Materials, Kinematics, and Assembly Structure with External References in AP242 BO Model XML format.

## 1.1 Functionality tested in this round

Functionality tested in this round relates to:

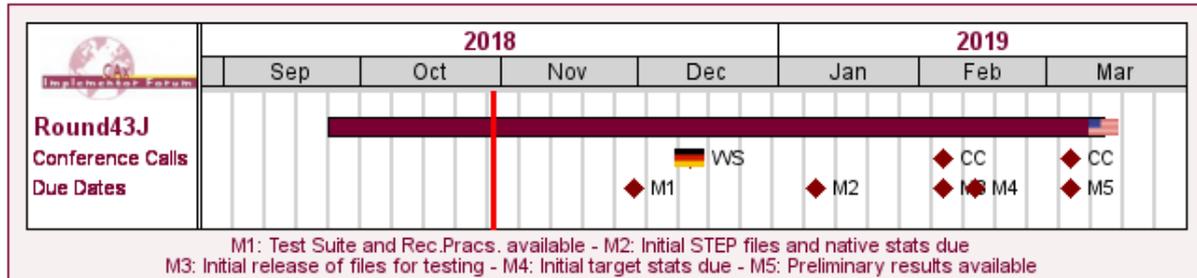
- **Product Manufacturing Information (PMI)** describes the capability to embed information about dimensions, tolerances and other parameters which are necessary input for the manufacturing and measuring of the part from the 3D model. This round, the focus will be on the two approaches for the transfer of PMI in the 3D model:
  - “Tessellated Presentation” refers to breaking down each annotation into tessellated elements as supported by AP242 and exchanging them as geometry. This preserves the exact shape of the annotation but is human readable only. The test will include section views as well.
  - “Semantic Representation” refers to the intelligent transfer of PMI data in an associative and re-usable way. This scenario aims towards driving downstream usage and later modifications of the model. The data is machine-readable, but not necessarily visible in the 3D model. The test also includes additional presentation data, which can be linked to the corresponding PMI representation.
- **Tessellated Geometry** is a simplified representation for the part shape, where the geometry is not given as an exact B-Rep model, but as a collection of simple planar faces (triangles) which can be easily and efficiently created and applied in specific use cases. The scope includes watertight tessellation and compressed STEP files.
- **AP242 BO Model XML Assembly Structure** is an implementation format introduced with AP242, and the designated process format for many applications in the aerospace and automotive industries. It will be used in combination with geometry formats matching the respective requirement. In the CAX-IF, the geometry files will be in STEP Part 21 format. The XML files contain the assembly structure and part master information.
- **Composite Materials** are made by layering various plies of material on top of each other. They can be defined in an implicit-precise way, by giving the laminate tables, ply boundaries, orientation, materials, and laminated cores; or in an explicit-tessellated way by calculating the resulting 3D Tessellated Solid. Both representations can be linked to each other.
- **Kinematics** is a capability in AP242 that allows describing the motion of parts over time and in relation to each other. This includes the definition of mechanisms with joints and constraints, defining the kinematic relationships between the parts, as well as motions, which are defined by capturing the positions of the moving parts at discrete points in time.

## 1.2 General testing instructions for this round

The general procedures for communication of models and statistics are outlined in a separate document, named 'General Testing Instructions'. The document can be retrieved from the CAX Implementor Forum web sites. The latest version is v1.13, dated September 29, 2017.

## 1.3 Testing Schedule

The following schedule has been agreed on for Round 43J:



| Date                                     | Action  |
|--|---|
| 30 Nov 2018 (Fri)                        | Test Suite and Rec.Pracs. available   |
| 12 Dec 2018 (Wed)                        | CAX-IF Technical Workshop in Darmstadt, Germany                               |
| 9 Jan 2019 (Wed)                         | Initial STEP files and native stats due                                       |
| 6 Feb 2019 (Wed)                         | 1st CAX-IF Round43J Conference Call /<br>Initial release of files for testing |
| 13 Feb 2019 (Wed)                        | Initial target stats due  |
| 6 Mar 2019 (Wed)                         | 2nd CAX-IF Round43J Conference Call /<br>Preliminary results available        |
| 11 Mar 2019 (Mon) -<br>13 Mar 2019 (Wed) | CAX-IF Round43J Review Meeting in<br>Asheville, NC, USA                       |

Figure 1: CAX-IF Round43J Schedule

The CAX-IF Technical Workshop will be held in conjunction with a LOTAR meeting. Conference calls and web sessions will also be available.

The CAX-IF R43J Review meeting will take place in conjunction with the PDES, Inc. Spring Offsite meeting and a LOTAR workshop. In addition, conference calls and web sessions will be available for those not attending the meeting to dial in.

## 1.4 Copyrights on Test Cases

### 1.4.1 CAX-IF

None of the production test cases which were provided by the AFNeT, PDES, Inc. and prostep ivip member companies may be publicly released for any purpose. The test cases can be freely distributed among the CAX-IF members and can be used for any purposes that are related to CAX-IF testing (i.e. testing, documentation of testing efforts, etc.), if a reference to the originating company is made.

The test cases must not be used for any purposes other than CAX-IF testing or outside of AFNeT, PDES, Inc. and prostep ivip. Test cases provided by the LOTAR project for testing of specific capabilities are applicable to the same restrictions and may not be used outside LOTAR or the CAX-IF.

## 1.4.2 NIST

The test cases developed at the National Institute of Standards and Technology (NIST) are not subject to copyright protection and are in the public domain. NIST assumes no responsibility for the components of the test system for use by other parties and makes no guarantees, expressed or implied, about their quality, reliability, or any other characteristic. The use of the CAD systems to create the Test Models does not imply a recommendation or endorsement by NIST.

For more details, read the disclaimer at <http://go.usa.gov/mGVm>

## 2 Synthetic Test Case Specifications

### 2.1 Test Case SP7: Semantic PMI Representation

All information about this test case can also be viewed in CAESAR on its Information page.

#### 2.1.1 Motivation

Product Manufacturing Information (PMI) is required for a number of business use cases in the context of STEP data exchange. Among others, it is a prerequisite for long-term data archiving. In addition, PMI can be used to drive downstream applications such as coordinate measuring and manufacturing.

Semantic PMI Representation relates to the capability to store PMI data in the STEP file in a computer-interpretable way, so that it can be used for model redesign or downstream applications. Though the definition of the data is complete, it is by itself not visible in the 3D model.

Additional presentation capabilities are needed to display the data in a way that it is visible to the user in the 3D model. The presentation data will not be formally evaluated in the SP7 test case, as this is the scope of the TGP3 test case (see section 2.2).

A wide variety of test models is available from NIST as well as prostep ivip, each containing a different selection of PMI elements. In the past, the overall success of PMI transfer was evaluated. In Round 43J, a focus scope will be defined for each model, and evaluation of the tests will concentrate on the characteristics of these particular PMI elements.

#### 2.1.2 Approach

The approach to be used is described in the latest version (at least v4.0.4, dated September 1, 2016) of the “Recommended Practices for Representation and Presentation of PMI (AP242)”, which can be found in the CAX-IF member area under “Information on Round38J of Testing”.

Within the PMI domain, the following functionalities are in scope of Round 43J:

- Semantic PMI Representation
- Graphic PMI Presentation (Polyline or Tessellated)
- Correct implementation and definition of the Saved Views (view layout and contents)
- Linking of PMI Representation to Presentation
- Transfer of editable PMI text as User Defined Attributes
- Semantic PMI Representation Validation Properties

The AP242 schema to be used is the AP242 Edition 2 DIS schema, which is available in the CAX-IF member area under “Information on Round 42J of Testing”.

As a fallback solution, the “trial” schema distributed together with the Recommended Practices v4.0.4 can be used as well. This is the minimum requirement to support Semantic PMI Validation Properties.

### 2.1.3 Testing Instructions

The tests will be performed based on a verified set of test models, each with set of well-defined PMI elements. In Round 43J, the models developed in the context of the “MBE PMI Validation and Conformance Testing” project will be used again, as they have been designed with emphasis on particular PMI capabilities.

#### 2.1.3.1 NIST Test Model Overview

The NIST models are constantly updated to the latest CAD software releases by the respective system vendors, in order to improve the definition of the models using the latest CAD system capabilities.

The links to the test model definitions, the NIST web page for the MBE PMI Validation and Conformance Testing Project, and illustrations of the 11 test cases can be found at the end of this document in Annex B.

#### 2.1.3.2 NIST Test Model Access

The updated native CAD files can be downloaded using the hyperlinks in the list below:

- [CATIA V5R26](#) (all CTC models; FTC models 6, 8, 9)
- [Creo 4](#) (all CTC and all FTC models – *NEW!*)
- [NX 11](#) (all CTC and all FTC models)
- [SolidWorks MBD 2018](#) (all CTC and all FTC models)
- [Inventor 2018](#) (all CTC and all FTC models)

Even though many updates have already been made by the respective system vendors, a number of verification issues remain to be solved. Should new native models with further updates become available during the test round, they will be distributed and announced accordingly.

#### 2.1.3.3 NIST Test Model Selection

A subset of the NIST test cases has been selected for Round 43J. Furthermore, for each test case, specific focus capabilities have been defined which will be the main objective for test evaluation this round:

- **CTC-2:** Datum Targets (points), Hole feature for multiple holes
- **CTC-4:** Dimensions, Tolerances for circular features
- **CTC-5:** Datum targets (rectangular), Spherical diameter, Good mix of geometric tolerances and modifiers
- **FTC-6:** Datum targets (lines and curves), radius, more holes
- **FTC-9:** Perpendicularity on hole diameter (every vendor had a different solution)

**Note:** CTC-1 has been removed from this list since most of the issues identified with this test case turned out to be modeling issues which have been fixed with the newly available Creo 4 models.

### 2.1.4 Test Model Configuration

The following functionality shall be included in the test files provided for this round of testing, as far as it has been implemented by the CAX-IF participants and is described in the Recommended Practices:

- **PMI Representation** – the re-usable representation of PMI data should be included in all SP7 models to the extent supported by the native system.

- PMI Graphic Presentation – Many CAD systems require some minimal presentation information to be able to handle the PMI data in a model. Usually, both PMI representation and presentation data are included in the same file. Thus, some form of presentation information shall be included in the SP7 test case as well.
- Definition of “Saved Views” – as far as supported, include the saved views defined in the models, which contain a subset of annotations in the file, and provide a pre-defined position of the model in the design space.
  - All models have multiple Saved Views defined. In the test case definition documents, each page of the PDF document represents one Saved View.
  - For each view, a screenshot showing the model layout (displayed elements, orientation, zoom) shall be provided.

**Note** that it is possible to attach several screenshots to one set of statistics in CAESAR. The name of the view shall be given as description for the screenshot.

  - Both “basic” and “advanced” view implementations are allowed.
  - The Saved Views shall also correctly show (or hide) the part geometry, as well as the non-solid Supplemental Geometry contained in some of the models (see section 9.4.2 / Figure 86 in the PMI Rec. Practices v4.0.4. An additional document pointing out important supplemental geometry elements for the NIST test cases is available in the CAx-IF member area, under “Information on Round 42J of testing”).
- Editable PMI Text – Some information relevant for PMI is not encoded in semantic entities, but given as plain text, such as the title block information or additional text on feature control frames. In the context of semantic data exchange, this content needs to be editable in the target system. The approach to be used for this is based on the transfer of User Defined Attributes, and its application in the context of PMI is described in section 7.4 of the PMI Recommended Practices v4.0.4.
- Linking PMI Representation to Presentation – If a model contains PMI Representation information as well as Presentation data, the corresponding elements shall be linked together, so that a Representation element “knows” which annotation it is being presented in the model. The approach to create this link is described in section 7.3 of the PMI Rec. Pracs. (v4.0.4).
- Validation Properties – All participants providing STEP files for this test case are encouraged to include validation properties as far as supported. In particular, for vendors already working on the topic, validation properties for Semantic PMI Representation should be included in the test files, based on section 10.1 in the PMI Recommended Practices v4.0.4.

Also refer to Annex A for test model translation configuration considerations.

### 2.1.5 Statistics

For each STEP file exported or imported for the SP7 test case, vendors must submit the corresponding statistics. To do so, go to the [ SP7 Data Sheet ], and either fill in the web form, or upload a comma-delimited file (.csv) with the data as listed below.

#### Native Statistics

When exporting a STEP file, report what data importing systems should expect to find. For numeric statistics, enter the respective value or 'na' if not supported. For other statistics, select either 'full support' (i.e. test case and Rec. Pracs. definitions are fulfilled), 'limited support' (meaning the implementation does not meet all criteria and issues may be expected on import), or 'na' if not supported.

## Target Statistics

When importing a STEP file, report the results after processing the file as described below.

### Screenshots

If presentation information is contained in the test files, it shall be accompanied by corresponding screenshots. Note that CASEAR allows the addition of multiple screenshots per dataset.

**Note** that in order to count the GD&T elements for the statistics, per agreement during the R22J Review Meeting, the actual STEP entity types (`datum`, `datum_target`...) shall be considered.

**Note** that based on the Round 35J results, a new count has been added for Composite Tolerances as defined in section 6.9.9. of the PMI Rec. Pracs. (v4.0.4).

**Note** that all statistics – native and target – shall be based on the Semantic PMI Representation data only, and not take any presentation into account.

**Note** that for evaluation of the aforementioned focus capabilities, the spreadsheets generated by the STEP File Analyzer and Viewer will be amended with corresponding aggregations of relevant counts and charts derived therefore.

### Data Sheet Columns

| column name                  | description  |
|------------------------------|--|
| <b>model</b>                 | The name of the test model, here 'sp6', with one of the following suffixed: 02, 05, 06, base, cheek, pole, spindle, vice.  |
| <b>system_n</b>              | The system code of the CAD system creating the STEP file   |
| <b>system_t</b>              | The system code of the CAD system importing the STEP file. For native stats, select 'stp'  |
| <b>scope</b>                 | A short designation for the contents of the model as defined in the Test Suite. This is for information only; there will be no results for this field.                                 |
| <b>dimensions</b>            | The number of dimensions processed   |
| <b>datums</b>                | The number of datums processed   |
| <b>datum_targets</b>         | The number of datum targets processed  |
| <b>tolerances</b>            | The number of tolerances (all types combined) processed, regardless of composition.  |
| <b>compos_tols</b>           | The number of composite tolerances processed (number of instances of <code>geometric_tolerance_relationship</code> per section 6.9.9. in the PMI Rec. Pracs. v4.0).                    |
| <b>labels</b>                | The number of labels processed   |
| <b>pmi_semantic_txt</b>      | all/partial/none – whether 'semantic' (editable) PMI text was transferred correctly (content and associativity)  |
| <b>pmi_semantic_val-prop</b> | all/partial/none – whether the validation properties for Semantic PMI Representation matched for all, some or none of the semantic PMI elements.                                       |
| <b>saved_view</b>            | The name of the Saved View which is the basis for the view-related statistics  |
| <b>view_annot</b>            | The number of annotations included in the specified saved view.  |
| <b>view_pos</b>              | pass/fail, whether the model orientation and zoom factor stored for the Saved View could be restored successfully.   |
| <b>elem_visibility</b>       | all/partial/none – whether all, some, or none of the elements to be displayed in the indicated saved view were mapped correctly into the corresponding <code>draughting_model</code> . |

| column name                 | description   |
|-----------------------------|---|
| <b>pmi_graphic_pres</b>     | all/partial/none – whether the graphic PMI annotations included in the file could be processed correctly                                      |
| <b>pmi_present_val-prop</b> | all/partial/none – whether the validation properties for Graphic PMI Presentation matched for all, some or none of the presentation elements. |
| <b>pmi_linked_pres_rep</b>  | all/partial/none – whether the Semantic PMI Representation elements and (Graphic) PMI Presentation elements were linked correctly together.   |
| <b>date</b>                 | The date when the statistics were last updated (will be filled in automatically)  |
| <b>issues</b>               | A short statement on issues with the file   |

## 2.2 Test Case TGP3: 3D Tessellated Geometry & Tessellated PMI Presentation

All information about this test case can also be viewed in CAESAR on its Information page.

### 2.2.1 Motivation

In addition to use cases that require a fully defined, precise, semantic definition of the part geometry and associated PMI, as is the focus of the SP7 test case described above, there are also scenarios where the presentation of the data – geometry and annotations – for visual consumption are the primary goal. In such cases, a simplified and optimized version of the model is sufficient.

For this purpose, AP242 introduced a data model for tessellated geometry, which can be used for tessellated part geometry, and also for graphic presentation of PMI in a much more efficient way than was the case with Polylines – especially in the case of filled characters. Tessellated PMI Presentation has been tested in combination with precise B-Rep geometry during previous test rounds; in Round 43J, the focus is a pure visualization scenario, where the part shape as well as the graphic PMI are given as tessellated geometry.

### 2.2.2 Approach

The approach to be used for Tessellated PMI Presentation is described in the latest version (at least v4.0.4, dated September 1, 2016) of the “Recommended Practices for Representation and Presentation of PMI (AP242)”, which can be found in the CAx-IF member area under “Information on Round38J of Testing”.

The approach to be used for the definition of the part shape is defined in the “Recommended Practices for Tessellated 3D Geometry” (v1.0; 2015-12-17), available on the public CAx-IF web sites under “Joint Testing Information”.

The preferred AP242 schema to be used is the AP242 Edition 2 DIS schema, which can be found in the CAx-IF member area under “Information on Round 42J of testing”. As a fallback, the AP242 Edition 1 IS version can be used. It can be found on the public CAx-IF web sites under “Joint Testing Information”.

### 2.2.3 Testing Instructions

The tests will be performed based on a subset of the NIST test models; see test case SP7 for details.

#### 2.2.3.1 Test Model Overview

- See section 2.1.3.1 above, as well as Annex B.

### 2.2.3.2 Test Model Access.

- See section 2.1.3.2 above.

### 2.2.3.3 Test Model Selection

In order to reduce the workload for the participating vendors, not all eleven models shall be tested in Round 43J. The following five models have chosen:

- CTC 2 & 5
- FTC 6, 8 & 9

This selection still covers a wide range of PMI elements, while reducing the number of exchanges to be done for each interface vendor.

**Note:** CAX-IF participants are requested to provide STEP files for as many NIST models as feasible. All files will be checked in detail by Bob Lipman using the latest version of the STEP File Analyzer and Viewer (SFA). Only the five models listed above will be fully checked through CAESAR, in order to keep the total effort required at a reasonable level.

### 2.2.3.4 Test Model Configuration

The following functionality shall be included in the test files provided for this round of testing, as far as it has been implemented by the CAX-IF participants and is described in the respective Recommended Practices:

- Tessellated 3D Geometry – include the part shape as tessellated geometry. If supported, water-tight tessellation shall be used.
- Tessellated Presentation – include the PMI elements as tessellated annotations. Stroked, outline, and filled fonts (and combinations) are allowed, as well as styling of the annotations (colors).
- Definition of “Saved Views” – as far as supported, include the saved views defined in the models, which contain a subset of annotations in the file, and provide a pre-defined position of the model in the design space.
  - All models have multiple Saved Views defined. In the test case definition documents, each page of the PDF document represents one Saved View.
  - For each view, a screenshot showing the model layout (displayed elements, orientation, zoom) shall be provided.

**Note** that it is possible to attach several screenshots to one set of statistics in CAESAR. The name of the view shall be given as description for the screenshot.

- Both “basic” and “advanced” view implementations are allowed.
- The Saved Views also shall correctly show (or hide) the part geometry, as well as the non-solid Supplemental Geometry contained in some of the models (see section 9.4.2 / Figure 86 in the PMI Rec. Practices v4.0.4). An additional document pointing out important supplemental geometry elements for the NIST test cases is available in the CAX-IF member area, under “Information on Round 42J of testing”.
- Cross-highlighting of annotations and annotated shape – if supported, include in the STEP file the information necessary to maintain the association between annotations and the annotated shape elements in a way, that after import, when highlighting an annotation, the shape elements annotated by it are highlighted too, and vice versa.
- Validation Properties for Tessellated Geometry and Presentation – as far as supported and applicable, include validation properties for tessellated 3D geometry as well as tessellated PMI presentations in the files, making sure they are associated with the

correct target elements and do not interfere with each other, and evaluate these after import.

Also refer to Annex A for test model translation configuration considerations.

**Note** that for the creation of the Equivalent Unicode String, the mapping as defined by the “Unicode String Project” report (Revision J) shall be used. This document is available on the public CAX-IF homepages, under “Joint Testing Information”.

**Note** that for the PMI validation properties, the new optimized implementation structure for validation properties can be used. This is currently defined in section 4.11 of the “Recommended Practices for Geometric and Assembly Validation Properties” (Release 4.4, dated August 17, 2016), which can be found on the CAX-IF homepages, under “Joint Testing Information”.

### 2.2.3.5 Statistics

For each STEP file exported or imported for the TGP3 test case, vendors must submit the corresponding statistics to CAESAR. To do so, go to the [ TGP3 Data Sheet ], and either fill in the web form, or upload a comma-delimited file (.csv) with the data as listed below.

#### View-related Statistics

Several of the Statistics for this test case are view-related (e.g. number of annotations, positioning/scaling). The statistics cannot evaluate this for all views in the model. Hence, the idea is to select one specific (interesting) view on export and publish its name in the “Saved View” field of the statistics. It is recommended to use the first view (by name, alphabetized) in the model. Then, fill in the other view-related statistics with the values as valid for this particular view. After import, select the view with the name given in the native statistics and again provide the values valid for this view.

#### Native Statistics

When exporting a STEP file, report what data importing systems should expect to find. For numeric statistics, enter the respective value or 'na' if not supported. For other statistics, select either 'full support' (i.e. test case and Rec. Pracs. definitions are fulfilled), 'limited support' (meaning the implementation does not meet all criteria and issues may be expected on import), or 'na' if not supported.

#### Target Statistics

When importing a STEP file, report the results found after processing the file as described in the table below.

#### Screenshots

For each Saved View in the model, provide one screenshot, which illustrates the layout (displayed geometry and annotation, model orientation, and zoom factor). Give the name of the view as the description of the screenshot.

**Note** that in order to count the PMI elements for the statistics, per agreement during the Round 22J Review Meeting, the names of the `tessellated_geometric_set` shall be considered.

See section “Indicating the Presented PMI Type” in the PMI Rec. Practices for details.

#### Data Sheet Columns

| column name | description  |
|-------------|--|
| model       | The name of the test model, here: 'TGP3' followed by the model index; e.g. 'TGP3-03'.    |
| system_n    | The system code of the CAD system creating the STEP file                                 |
| system_t    | The system code of the CAD system importing the STEP file. For native stats, enter 'stp' |

|                         |  |
|-------------------------|--|
| <b>dimension</b>        | The number of dimensions processed   |
| <b>datums</b>           | The number of datums processed   |
| <b>datum_targets</b>    | The number of datum targets processed  |
| <b>tolerances</b>       | The number of tolerances processed   |
| <b>labels</b>           | The number of labels processed   |
| <b>saved_view</b>       | The name of the Saved View which is the basis for the view-related statistics  |
| <b>view_annot</b>       | The number of annotations included in the specified saved view.  |
| <b>view_pos</b>         | pass/fail, whether the model orientation and zoom factor stored for the Saved View could be restored successfully.   |
| <b>elem_visibility</b>  | all/partial/none – whether all, some, or none of the elements to be displayed in the indicated saved view were mapped correctly into the corresponding draughting_model. |
| <b>highlight</b>        | all/partial/none – whether the cross-highlighting for annotations and annotated shape elements works correctly   |
| <b>tess_pmi_area</b>    | all/partial/none – whether the surface area of the Tessellated PMI annotations was validated successfully for all, some or none of the given annotations.                |
| <b>tess_pmi_clength</b> | all/partial/none – whether the total length of segments per Tessellated PMI annotation was validated successfully for all, some or none of the given annotations.        |
| <b>tess_pmi_c</b>       | all/partial/none – whether the centroids of the Tessellated PMI annotations were validated successfully for all, some or none of the given annotations.                  |
| <b>eq_unicode</b>       | all/partial/none - if the encoding of the equivalent Unicode string was correct for all, some or none of the given annotations.  |
| <b>valid_tess_vp</b>    | pass/fail, is the instantiation of the validation properties for Tessellated Geometry in the STEP file per the recommended practices?                                    |
| <b>affected_geo</b>     | all/partial/none – whether the affected geometry could be validated correctly for all, some or none of the PMI statements in the model.                                  |
| <b>date</b>             | The date when the statistics were last updated (will be filled in automatically)   |
| <b>issues</b>           | A short statement on issues with the file  |

### 2.3 Test Case PDM4: AP242 BO Model XML PDM Interoperability

All information about this test case can also be viewed in CAESAR on its Information page.

#### 2.3.1 Motivation

The AP242 BO Model XML is the designated standard process format for the automotive and aerospace industries. As such, it is being used in a variety of use cases. One of its main application scenarios is the exchange of Product Data Management (PDM) information. To develop the specific capabilities needed for this, the PDM-IF has been launched, and has just concluded its sixth round of testing.

The Recommended Practices for AP242 BO Model XML Product & Assembly Structure are a joint publication of the PDM-IF with the CAx-IF and the JT-IF.

CAx-PDM Interoperability has been tested in previous rounds of CAx-IF and PDM-IF testing and led to improvements in the Recommended Practices as well as the participating interfaces. During the December 2018 PDM-IF meeting, user interest in this topic has been confirmed with the presentation of the “Visual Issue Management” (VIM) test case, which contains actions to be taken on both sides.

The following process steps (as shown in Figure 2 below) are relevant for PDM4:

1. Import data (AP242 XML Structure + AP242 Part 21 Geometry) provided by the PDM-IF (step 7). Note that markups / redlining is out of scope this round.
2. Introduce changes (e.g., change position of components, add (duplicate) part instances in a different location etc.) (step 8)
3. Re-export the data to AP242 XML + AP242 Part 21 Geometry. This re-exported data will be handed back to the PDM-IF (step 9).

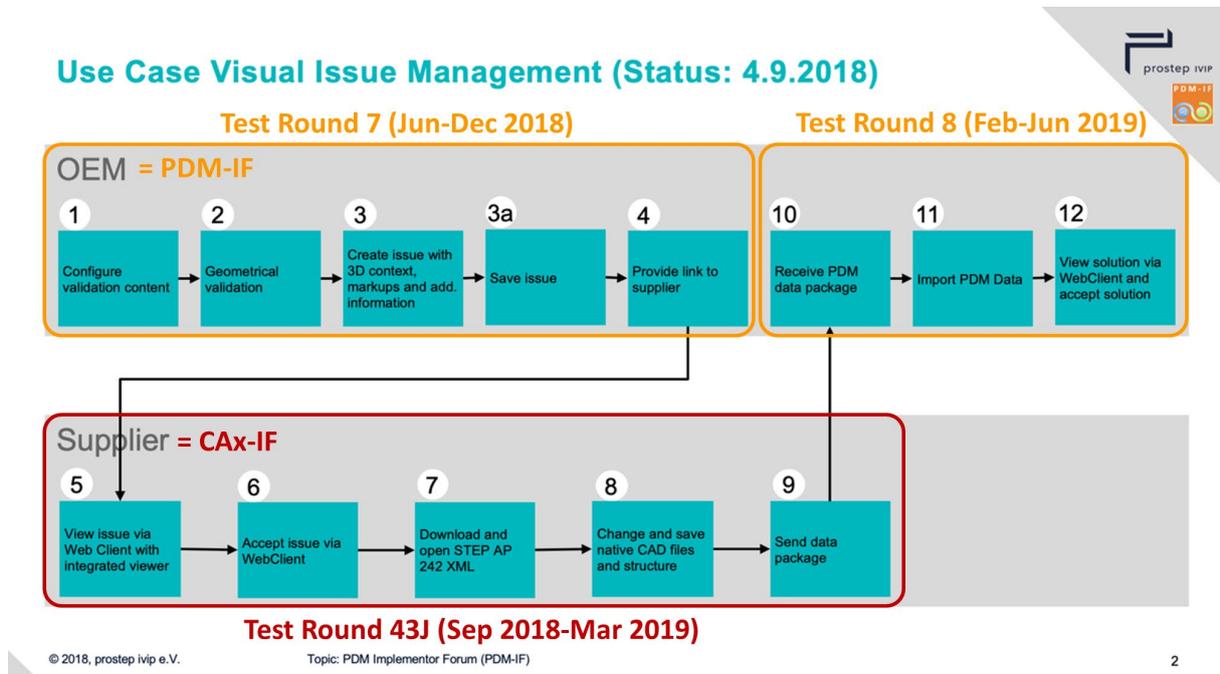


Figure 2: Overview of the PDM-IF "Visual Issue Management" Use Case

### 2.3.2 Approach

The following schemas and documents shall be used for this test:

- AP242 Business Object Model XML – for schema location, see the corresponding Rec. Practices listed below.
- Recommended Practices for AP242 (TC) Business Object Model XML Assembly Structure, version 2.0, dated October 30, 2018
- AP242 IS Longform Schema (v1.36), dated May 22, 2014

All documents are available on the CAx-IF homepage under "Joint Testing Information".

As result of the PDM interoperability tests recently carried out in the CAx-IF, PDM-IF and JT-IF, a new section "CAx-PDM Interoperability Guide" has been added as section 15 to the AP242 XML Recommended Practices for Product and Assembly Structure (v2.0). It gives specific guidelines how to handle additional PDM information upon import into a CAD system.

### 2.3.3 Testing Instructions

Data from PDM-IF Test Round 7 is available in the CAx-IF member area under "Information on Round 43J" of testing. The data is based on two test cases:

- CONF4: Configuration Management
  - Revision Effectivities
  - Occurrence Effectivities

- Combinations of Effectivities
- VDA
  - Multiple Part IDs
  - Multiple Languages

The ZIP package with the test data also contains two PDFs with more detailed information on the two test cases.

Data for both test cases is available from two vendors:

- Dassault Systèmes (3DEXperience)
- PTC (Windchill)

The tasks for the CAX-IF participants in Round 43J are to:

- Import the data, following the recommendations provided in the “CAX-PDM Interoperability Guide” (AP242 XML Recommended Practices section 15).
- Report the results on importing the data (see section 2.3.4 below)
- Introduce a PDM-relevant change in the model, e.g.
  - a change in the assembly structure (adding / moving / deleting a component)
  - modification of the part geometry (generating a new part file)
  - Please provide short documentation (e.g. a presentation slide) of the changes
- Re-export the data as AP242 XML + AP242 Part 21 Geometry
  - For this test to work, it is essential that the original Part IDs from the PDM system are preserved and re-exported, see sections 4.6.6 and 5.1.6 on “exchange identification information” in the Rec. Practices

### 2.3.4 Statistics

For each STEP file imported for the PDM4 test case, vendors must submit the corresponding statistics to CAESAR. To do so, go to the [ PDM4 Data Sheet ], and either fill in the web form, or upload a comma-delimited file (.csv) with the data as listed below.

#### Target Statistics

When importing a STEP file, report the results found after post-processing the file as described in the table below.

#### Data Sheet Columns

| column name           | description   |
|-----------------------|---|
| <b>model</b>          | The name of the test model, here: 'PDM2'  |
| <b>system_n</b>       | The system code of the CAD system creating the STEP file  |
| <b>system_t</b>       | The system code of the CAD system importing the STEP file. For native stats, enter 'stp'  |
| <b>fref_found</b>     | all/partial/none - indicates if all, some or none of the references to the external files can be found in the assembly structure file(s), and if they are correctly associated with the respective nodes in the assembly structure. |
| <b>fref_processed</b> | all/partial/none - indicates if all, some or none of the referenced files were processed correctly to successfully construct the overall model.   |

|                        |   |
|------------------------|---|
| <b>assem_struct</b>    | pass/fail - if the model structure (assembly tree) was transferred correctly, i.e. no nodes have been added or removed, and all elements are on the correct hierarchical level. |
| <b>assem_place</b>     | all/partial/none - whether the placement of assembly components is correct  |
| <b>children</b>        | pass/fail, indicates whether the number of children for each node in the assembly tree matches the AVP value given in the STEP file   |
| <b>valid_child</b>     | pass/fail, is the instantiation of the validation property 'number of children' in the STEP file as per the recommended practices for validation properties?                    |
| <b>notional_solids</b> | all/partial/none, whether the position of all, some or none of the assembly components in the model could be validated through the 'notional solids' AVP.                       |
| <b>valid_notion</b>    | pass/fail, is the instantiation of the validation property 'notional solids' in the STEP file as per the recommended practices for validation properties?                       |
| <b>date</b>            | The date when the statistics were last updated (will be filled in automatically)  |
| <b>issues</b>          | A short statement on issues with the file   |

## 2.4 Test Case KM1: Kinematics

All information about this test case can also be viewed in CAESAR on its Information page.

### 2.4.1 Motivation

CAD methods have been used for many years now to design individual parts and assemblies of all sizes across all industries, from a single rivet to an entire airplane. Classically, the main focus is to ensure that the part can be manufactured correctly.

Products such as cars or planes are not static, however, contain many moving components: engine, power windows, foldable roof, windshield wipers, cargo doors, etc. Thus, Kinematics are used to ensure they move correctly, and also to illustrate the behavior of the finished product. The use cases range from the definition of the Kinematic Mechanism, providing all relationships and constraints between the elements so that their definition can be changed in the receiving application, to Kinematic Motion, which works like a movie by providing discrete positions of the components over time.

The goal is to use a neutral standard format – AP242 BO Model XML – for the definition of the Kinematic mechanisms and motion, with external references to the applicable geometry format for the respective use case.

### 2.4.2 Approach

The approaches for “Kinematic Mechanism” and “Kinematic Motion” are described in the “Recommended Practices for STEP AP242 TC Business Object Model XML Kinematics”, Version 0.8 (dated August 14, 2018), which can be found in the CAD member area of the CAx-IF web sites under “Information on Round 42J of Testing”.

During the development of these capabilities, several new entity types have been defined to improve the implementation structure. This will be included in AP242 with the DIS release of Edition 2. To enable immediate testing, a trial XSD schema is available, which is built by extending the AP242 TC schema with these new entities. It is available at the following URL:

[https://www.cax-if.de/xml-schema/3001/20170810/bom\\_20170810.xsd](https://www.cax-if.de/xml-schema/3001/20170810/bom_20170810.xsd)

The corresponding name space definition is given in the aforementioned Recommended Practices, Section 1.1.2.

The Kinematic capabilities for AP242 XML are developed jointly by the CAX-IF and the JT-IF, thus supporting Aerospace as well as Automotive requirements, and also broadening the scope of participating CAD systems. File sets created for the KM1 test case in Round 43J will be traded with the JT-IF Test Round 17 (February - June 2019). To ease the exchange of the files, the part geometry files for the KM1 test model are available in STEP AP242 Part 21 as well as ISO JT (JT v9.5) format, so the AP242 XML file references can easily be adapted for the preferred geometry format.

### 2.4.3 Testing Instructions

A set of sample models is provided for this first Kinematics test. The mechanism can best be described as a single-cylinder piston engine. The model is available in the following native formats:

- CATIA V5R21
- Creo 3.0
- NX 11

The files can be found in the File Repository inside the CAX-IF member area, in the folder “/CAD/Round 41J/Kinematics”.

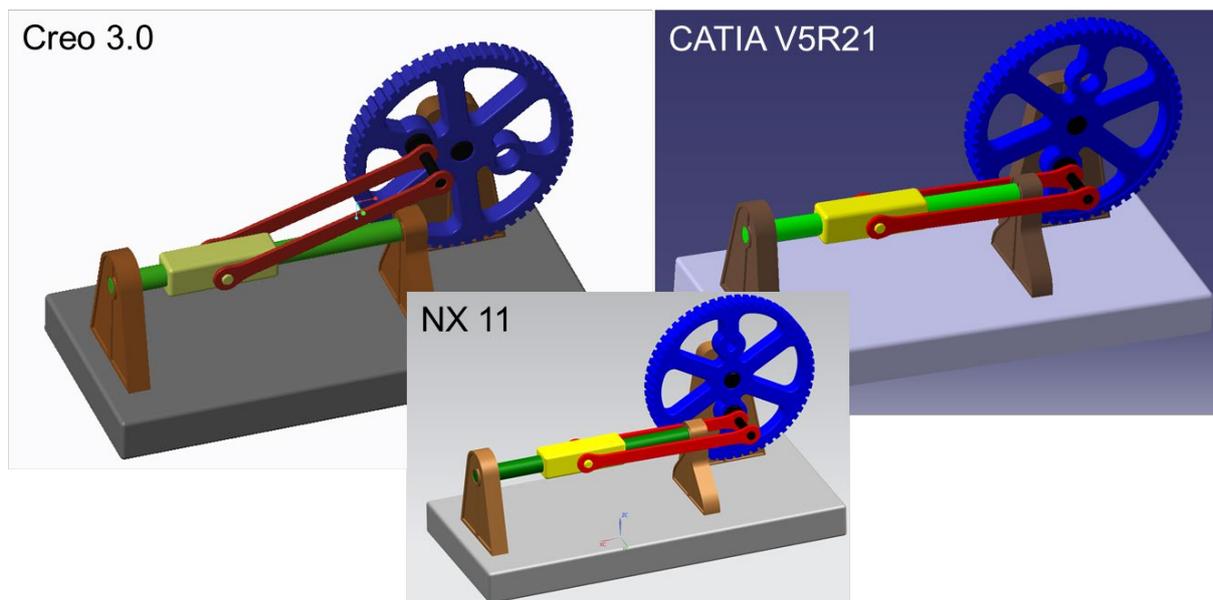


Figure 3: Illustration of the KM1 test models

The following is in scope of Round 43J:

- Kinematic Motion provides discrete positions of the moving components with a time index and can be played back similar to a stop-motion animation. This capability is aimed mostly at viewing and long-term archiving scenarios, because it does not require the target application to have a kinematic solver.
- Kinematic Mechanism includes the definition of kinematic pairs (joints and constraints) and actuators. The goal is that the mechanism is editable in the target system, while preserving the dependencies defined in the original system.
- Assembly & Kinematic Data shall be provided in a single AP242 BO Model XML file.
- Geometry shall be included as STEP AP242 Part 21 precise B-Rep files.

**Note** that the Kinematic capabilities (Mechanism as well as Motion) are tested in cooperation with the JT Implementor Forum, in order to increase the number of participating systems and to enable exchange of data between different systems. This requires replacing the geometry files as well as the file references in the AP242 XML file but has no impact on the actual Kinematic capabilities.

## 2.4.4 Statistics

For each STEP file exported or imported for the KM1 test case, vendors must submit the corresponding statistics. To do so, go to the [ KM1 Data Sheet ], and either fill in the web form, or upload a comma-delimited file (.csv) with the data as listed below.

### Native Statistics

When exporting a STEP file, report what data importing systems should expect to find. For numeric statistics, enter the respective value or 'na' if not supported. For other statistics, select 'full support' (i.e. test case and Rec. Pracs. definitions are fulfilled), 'limited support' (meaning the implementation does not meet all criteria and issues may be expected on import), or 'na' if not supported.

### Target Statistics

When importing a file, report the results found after processing the file as described below.

### Kinematics-specific Statistics

For more detailed information about and discussion of in the Kinematics-specific statistics, please refer to section 4.12 of the Kinematics Recommended Practices mentioned above.

### Data Sheet Columns

| column name             | description   |
|-------------------------|---|
| <b>model</b>            | The name of the test model, here 'SM2'  |
| <b>system_n</b>         | The system code of the CAD system creating the STEP file  |
| <b>system_t</b>         | The system code of the CAD system importing the STEP file. For native stats, select 'stp'   |
| <b>assem_struct</b>     | pass/fail - if the model structure (assembly tree) was transferred correctly, i.e. no nodes have been added or removed, and all elements are on the correct hierarchical level. |
| <b>kin_motions</b>      | The number of Kinematic Motions defined in the model  |
| <b>kin_motion_paths</b> | The number of paths defined for a Kinematic Motion  |
| <b>kin_mechanisms</b>   | The number of Kinematic Mechanisms defined in the model   |
| <b>kin_mech_pairs</b>   | The number of low/high order Kinematic Pairs defined for a Kinematic Mechanism  |
| <b>kin_mech_acts</b>    | The number of Kinematic Pairs that have a non-zero value in the attribute 'actuation', i.e. where an initial movement can occur   |
| <b>date</b>             | The date when the statistics were last updated (will be filled in automatically)  |
| <b>issues</b>           | A short statement on issues with the file   |

## 2.5 Test Case CO2: Composite Materials (Ply Contour)

All information about this test case can also be viewed in CAESAR on its Information page.

### 2.5.1 Motivation

For several years, some STEP composite interfaces have been available in several CAD tools such as CATIA V5, FiberSIM and in CT CoreTechnologie tools, with a certain level of maturity proven by LOTAR pilot projects.

The goal of including Composite Materials in a CAX-IF test round is to align these implementations and provide an official framework for composite materials implementation tests as STEP AP 242e1 since it includes this capability.

### 2.5.2 Approach

The scope of this test case is the “exact implicit” representation of composites where the ply geometry is based on surfaces and contours. “Basic” composite validation properties at the part level are also in scope of this test case. The approximate explicit representation of composite plies, where there is a 3D tessellated solid for each ply, is out of scope for this test case.

The approach is to export and to import composite information in STEP AP242 based on the:

- AP242 Edition 2 DIS Longform Express Schema, available in the CAX-IF member area under “Information on Round 42J of Testing”.
- The “AP242 Edition 1 MIM Longform EXPRESS Schema with Composite Patch” can be used as a fallback
- Recommended Practices for Composite Materials; Version 3.4; June 13, 2017
- Draft Recommended Practices for Composite Structure Validation Properties; Release 0.9; June 8, 2017

Unless otherwise noted, the documents are available in the member area of the CAX-IF homepages, under “Information on Round 40J of Testing”.

As the validation properties recommended practices have not been completely agreed upon, some tests will be done by end user checks.

### 2.5.3 Testing Instructions

The test case CPD\_PUBLIC\_LOTAR.CATPart will be used. The model has been provided by Airbus Helicopter.

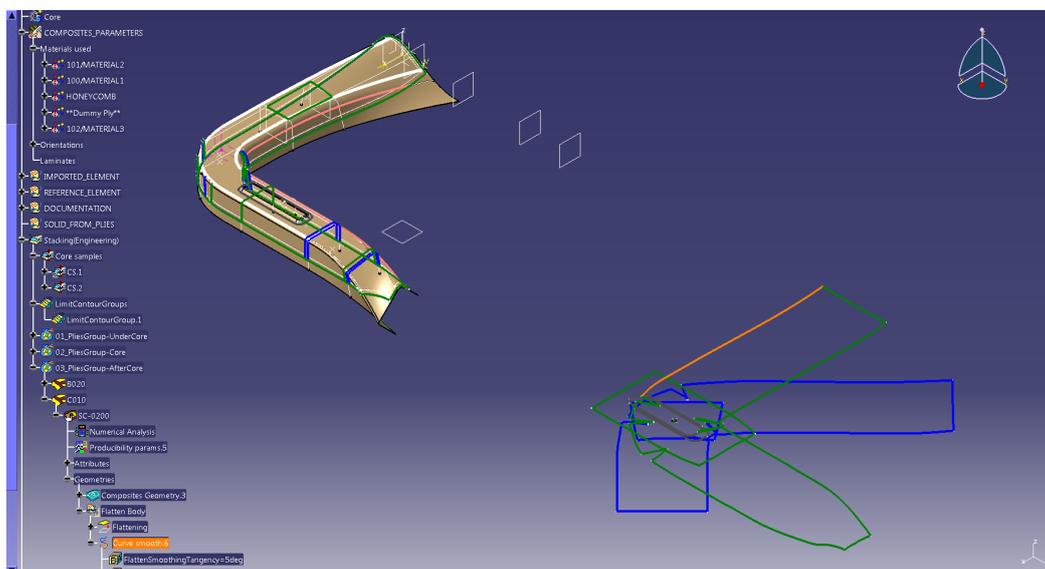


Figure 4: Illustration of the CO2 Test Case

The test case is available in the member area of the CAx-IF homepages, under "Information on Round 40J of Testing".

## 2.5.4 Statistics

For each STEP file exported or imported for the CO2 test case, vendors must submit the corresponding statistics. To do so, go to the [ CO2 Data Sheet ], and either fill in the web form, or upload a comma-delimited file (.csv) with the data as listed below.

### Native Statistics

When exporting a STEP file, report what data importing systems should expect to find. For numeric statistics, enter the respective value or 'na' if not supported. For other statistics, select either 'full support' (i.e. test case and Rec. Pracs. definitions are fulfilled), 'limited support' (meaning the implementation does not meet all criteria and issues may be expected on import), or 'na' if not supported.

### Target Statistics

When importing a file, report the results found after processing the file as described below:

### Ply-related Statistics

Several of the Statistics for this test case are related to a specific ply within a specific sequence (e.g., material, orientation, rosette). The statistics cannot evaluate this for all plies in the model. Hence, the idea is to select one specific (interesting) sequence and ply on export, and to publish its name in the "Composite Ply Sequence" field of the statistics. Then, fill in the other ply-related statistics with the values as valid for this particular sequence and ply. After import, select the sequence and ply with the name given in the native statistics, and again provide the values valid for this particular sequence and ply.

The sequence and ply to be used for evaluating the CO3 test case in Round 40J is:

PLY SC-0035 of SEQUENCE A035

### Statistics for Core Sample Point

The position of the point for the Core Sample shall be given for:

CORE SAMPLE CS1

### Statistics for Flatten Pattern

The length of the curve contour of the flatten pattern shall be given for:

PLY SC0200 of SEQUENCE C010

### Data Sheet Columns

These statistics will be enhanced in future test rounds, especially with the release of newer versions of the Recommended Practices for Composite Structure Validation Properties.

| column name   | description   |
|---------------|---|
| model         | The name of the test model, here 'CO3'  |
| system_n      | The system code of the CAD system creating the STEP file                                  |
| system_t      | The system code of the CAD system importing the STEP file. For native stats, select 'stp' |
| unit          | The unit the model is designed in   |
| compos_tables | The number of Composite Tables in the Model   |
| sequences     | The number of Sequences in the model  |
| plies         | The total number of plies in the file   |
| num_materials | Total number of Materials defined   |

| column name                    | description  |
|--------------------------------|--|
| <b>compos_table_name</b>       | The name of the Composite Table of the model   |
| <b>ply_sequence</b>            | The ID of the Sequence and the ID of the Ply within that Sequence for all ply-related statistics; e.g., "Ply.P4 of Sequence.S4".                       |
| <b>seq_ply_number</b>          | The total number of Plies defined within the Sequence as listed in the "Composite Ply Sequence" column of the data sheet.                              |
| <b>seq_ply_material</b>        | The name of the Material of the specific Ply and Sequence as listed in the "Composite Ply Sequence" column of the data sheet.                          |
| <b>seq_ply_mat_type</b>        | The type of Material of the specific Ply and Sequence as listed in the "Composite Ply Sequence" column of the data sheet.                              |
| <b>seq_ply_orient</b>          | pass/fail - whether the orientation of the specific Ply and Sequence as listed in the "Composite Ply Sequence" column of the data sheet was correct    |
| <b>seq_ply_rosette</b>         | The name of the Rosette of the specific Ply and Sequence as listed in the "Composite Ply Sequence" column of the data sheet.                           |
| <b>ply_surface_area</b>        | The value of the area of the specific Ply and Sequence as listed in the "Composite Ply Sequence" column of the data sheet.                             |
| <b>num_core_samples</b>        | The total number of core samples in the file   |
| <b>cs_pointx</b>               | Position of the point for the Core Sample indicated in the Test Suite.   |
| <b>cs_pointy</b>               |  |
| <b>cs_pointz</b>               |  |
| <b>fp_length</b>               | The length of the curve contour of the Flatten pattern of the ply and sequence indicated in the Test Suite document.                                   |
| <b>validation_c_tables</b>     | Total number of Composite Tables in the model, as received via the validation properties capability  |
| <b>validation_sequences</b>    | Total number of Sequences as received via the validation properties capability   |
| <b>validation_plies</b>        | Total number of Plies (entire assembly) as received via the validation properties capability   |
| <b>validation_c_materials</b>  | Total number of Materials as received via the validation properties capability   |
| <b>validation_c_orient</b>     | pass/fail, indicates whether the Number of Orientations per part in the model matches the Composite validation property value given in the STEP file   |
| <b>validation_ply_area</b>     | pass/fail, indicates whether the sum of all ply surface areas in the part matches the Composite validation property value given in the STEP file       |
| <b>validation_ply_centroid</b> | pass/fail, indicates whether the sum of all ply geometric centroids in the part matches the Composite Validation Property value given in the STEP file |
| <b>valid_cvp</b>               | pass/fail, is the instantiation of the validation properties for Tessellated Geometry in the STEP file as per the recommended practices?               |

| column name | description  |
|-------------|--|
| date        | The date when the statistics were last updated (will be filled in automatically) |
| issues      | A short statement on issues with the file  |

## 2.6 Test Case CO3: Composite Materials (3D Explicit Ply Representation)

All information about this test case can also be viewed in CAESAR on its Information page.

### 2.6.1 Motivation

For several years, some STEP composite interfaces have been available in several CAD tools such as CATIA V5, FiberSIM and in CT CoreTechnologie tools, with a certain level of maturity proven by LOTAR pilot projects.

The goal of including Composite Materials in a CAX-IF test round is to align these implementations and provide an official framework for composite materials implementation tests as STEP AP 242e1 includes this capability.

### 2.6.2 Approach

The scope of this test case is the “3D tessellated” representation for each ply. The approximate explicit representation of composite plies includes a 3D tessellated solid for each ply.

The approach is to export and import the composite information in STEP AP242 based on the Recommended Practices for Composite Materials; Version 3.4; June 13, 2017. The document is available in the member area of the CAX-IF homepages, under “Information on Round 40J of Testing”.

Implementation requires at least using the “AP242 Edition 1 MIM Longform EXPRESS Schema with Composite Patch”, which is available in the same location.

The recommended schema to use, though, is the “AS242 Edition 2 DIS Longform EXPRESS Schema”, which is available under “Information on Round 42J of Testing” in the member area.

Refer to Annex C for further information on the extended data model.

As the validation properties recommended practices have not been completely agreed upon, the tests will be done by end user checks.

### 2.6.3 Testing Instructions

The test case ASME\_Y14.37\_RosetteType2.CATPart will be used. The model has been provided by The Boeing Company.

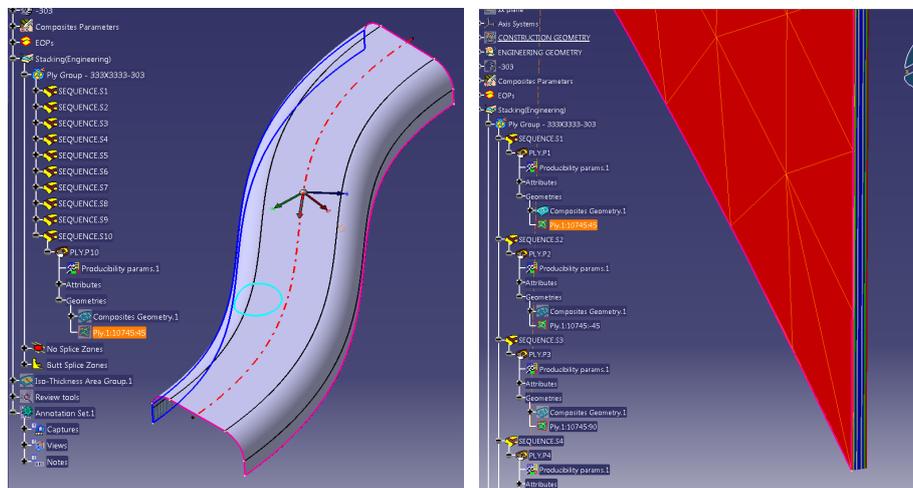


Figure 5: Illustration of the CO3 Test Case

The test model contains the 3D tessellated representation of each ply.

The test case is available in the member area of the CAx-IF homepages, under "Information on Round 40J of Testing".

## 2.6.4 Statistics

For each STEP file exported or imported for the CO3 test case, vendors must submit the corresponding statistics. To do so, go to the [ CO3 Data Sheet ], and either fill in the web form, or upload a comma-delimited file (.csv) with the data as listed below.

### Native Statistics

When exporting a STEP file, report what data importing systems should expect to find. For numeric statistics, enter the respective value or 'na' if not supported. For other statistics, select either 'full support' (i.e. test case and Rec. Pracs. definitions are fulfilled), 'limited support' (meaning the implementation does not meet all criteria and issues may be expected on import), or 'na' if not supported.

### Target Statistics

When importing a STEP file, report the results found after processing the file as described in the table below.

### Ply-related Statistics

Several of the Statistics for this test case are related to a specific ply within a specific sequence (e.g., material, orientation, rosette). The statistics cannot evaluate this for all plies in the model. Hence, the idea is to select one specific (interesting) sequence and ply on export, and to publish its name in the "Composite Ply Sequence" field of the statistics. Then, fill in the other ply-related statistics with the values as valid for this particular sequence and ply. After import, select the sequence and ply with the name given in the native statistics, and again provide the values valid for this particular sequence and ply.

The sequence and ply to be used for evaluating the CO3 test case in Round 40J is:

**PLY.P4 of SEQUENCE S.4**

### Data Sheet Columns

| column name              | description   |
|--------------------------|---|
| <b>model</b>             | The name of the test model, here 'CO3'  |
| <b>system_n</b>          | The system code of the CAD system creating the STEP file                                  |
| <b>system_t</b>          | The system code of the CAD system importing the STEP file. For native stats, select 'stp' |
| <b>unit</b>              | The unit the model is designed in   |
| <b>compos_tables</b>     | The number of Composite Tables in the Model   |
| <b>compos_table_name</b> | The name of the Composite Table of the model  |
| <b>sequences</b>         | The number of Sequences in the model  |
| <b>plies</b>             | The total number of plies in the file   |
| <b>num_materials</b>     | Total number of Materials defined   |
| <b>num_saved_views</b>   | The number of Saved Views defined in the model  |
| <b>num_annotations</b>   | The total number of Annotations defined in the model.                                     |

| column name              | description  |
|--------------------------|--|
| <b>ply_sequence</b>      | The ID of the Sequence and the ID of the Ply within that Sequence for all ply-related statistics.<br>For CO3, use: "Ply.P4 of Sequence.S4".                                    |
| <b>seq_ply_number</b>    | The total number of Plies defined within the Sequence as listed in the "Composite Ply Sequence" column of the data sheet.  |
| <b>seq_ply_material</b>  | The name of the Material of the specific Ply and Sequence as listed in the "Composite Ply Sequence" column of the data sheet.  |
| <b>seq_ply_mat_type</b>  | The type of Material of the specific Ply and Sequence as listed in the "Composite Ply Sequence" column of the data sheet.  |
| <b>seq_ply_orient</b>    | pass/fail - whether the orientation of the specific Ply and Sequence as listed in the "Composite Ply Sequence" column of the data sheet was correct                            |
| <b>seq_ply_rosette</b>   | The name of the Rosette of the specific Ply and Sequence as listed in the "Composite Ply Sequence" column of the data sheet.   |
| <b>ply_rosette_type</b>  | The type of the Rosette of the specific Ply and Sequence as listed in the "Composite Ply Sequence" column of the data sheet.   |
| <b>ply_contour_area</b>  | The surface area of the ply contour of the specific Ply and Sequence as listed in the "Composite Ply Sequence" column of the data sheet.                                       |
| <b>facets</b>            | The number of facets in the Tessellated model  |
| <b>ply_explicit_area</b> | The surface area of the 3D explicit representation (tessellated geometry) of the specific Ply and Sequence as listed in the "Composite Ply Sequence" column of the data sheet. |
| <b>date</b>              | The date when the statistics were last updated (will be filled in automatically)   |
| <b>issues</b>            | A short statement on issues with the file  |

## Annex A NIST Model Translation Configuration Considerations

Based on data translation issues identified in the NIST Phase 2 project (requiring multiple dataset submission iterations to resolve), the following translator configuration considerations have been derived for the PMI-related test cases (SP6 and TGP3) in Round 42J:

- Include annotations, coordinate systems, model properties, and PMI views
- Include supplemental geometry (non-solid surfaces, curves, points)
- Preserve annotation associations with both product and supplemental geometry
- Preserve annotation semantic PMI properties
  - Clearly point out if these are intentionally not translated
- Preserve annotation text
  - Creo should be configured to display dimension tolerances (tol\_display on)
  - Do not drop leading zeros or add trailing zeros
- Preserve annotation units
  - CTC 01, 02, and 04 are defined in millimeters
  - CTC 03 and 05 are defined in inches
  - FTC 06 through 09 models are defined in inches
  - FTC 10 and 11 models are defined in millimeters
- Preserve display names of annotations and coordinate systems
  - Point out if you use NX 9 or newer since this will change some of the annotation names (see Figure 6 below)
- Preserve display colors of product geometry, supplemental geometry, and annotations
- Preserve view-specific visibility of annotations, coordinate systems, and supplemental geometry:
  - In the ZIP files with the test case specifications (see links in section 2.1.3), there is a PDF named "*nist\_[ctc/ftc]\_suppl\_elem\_visibility.pdf*" which gives a detailed definition of which elements shall be visible in which view, and which not.
  - Note that for each test case, there is a second PDF document included in the ZIP files, named "*...\_elem\_ids.pdf*" which contains the element ids for unambiguous identification of all PMI.
- Preserve view frustum (orientation and zoom level) definition:
  - JT model views should be defined so they are listed in the "Model Views" menu of JT2Go and work properly when selected
- Do not export extraneous information
  - Only CATIA Captures (not Views) should be exported to STEP Saved Views
  - Creo sketch dimensions should only be included when visible in a Combined View

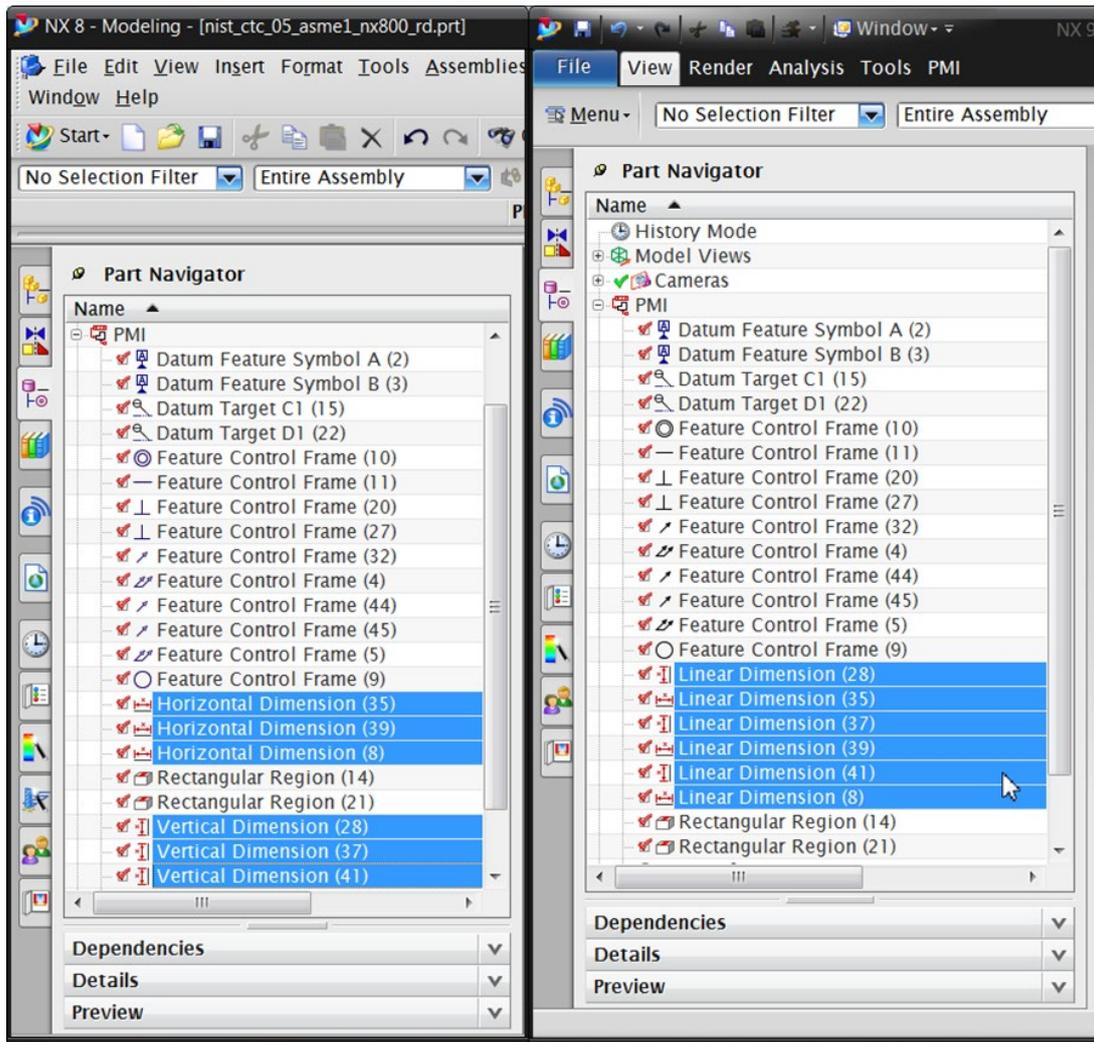


Figure 6: NX 8 vs. NX 9 Dimension Display Names

## Annex B NIST Model Definitions

This section provides an overview of the test models used for testing of PMI capabilities in Round 42J, namely SP6 (see section 2.1) and TGP3 (see section 2.2). All of these models have been developed in the course of NIST's "MBE PMI Validation and Conformance Testing Project". Information on this project and related activities can be found on internet at <https://pages.nist.gov/CAD-PMI-Testing/>

The full suite of models consists of two data sets:

First, the so-called Complex Text Cases (CTC). These are the models with indices 01-05. They contain a collection of basic PMI constructs. Download the definitions from:

[https://s3.amazonaws.com/nist-el/mfg\\_digitalthread/NIST\\_CTC\\_Definitions\\_Dec\\_2016.zip](https://s3.amazonaws.com/nist-el/mfg_digitalthread/NIST_CTC_Definitions_Dec_2016.zip)

Second, the so-called Fully-toleranced Test Cases (FTC). These are the models with indices 06-11. They are fully defined models, providing all information required to actually manufacture and inspect the models. Download the definitions from:

[https://s3.amazonaws.com/nist-el/mfg\\_digitalthread/NIST\\_FTC\\_Definitions\\_Dec\\_2016.zip](https://s3.amazonaws.com/nist-el/mfg_digitalthread/NIST_FTC_Definitions_Dec_2016.zip)

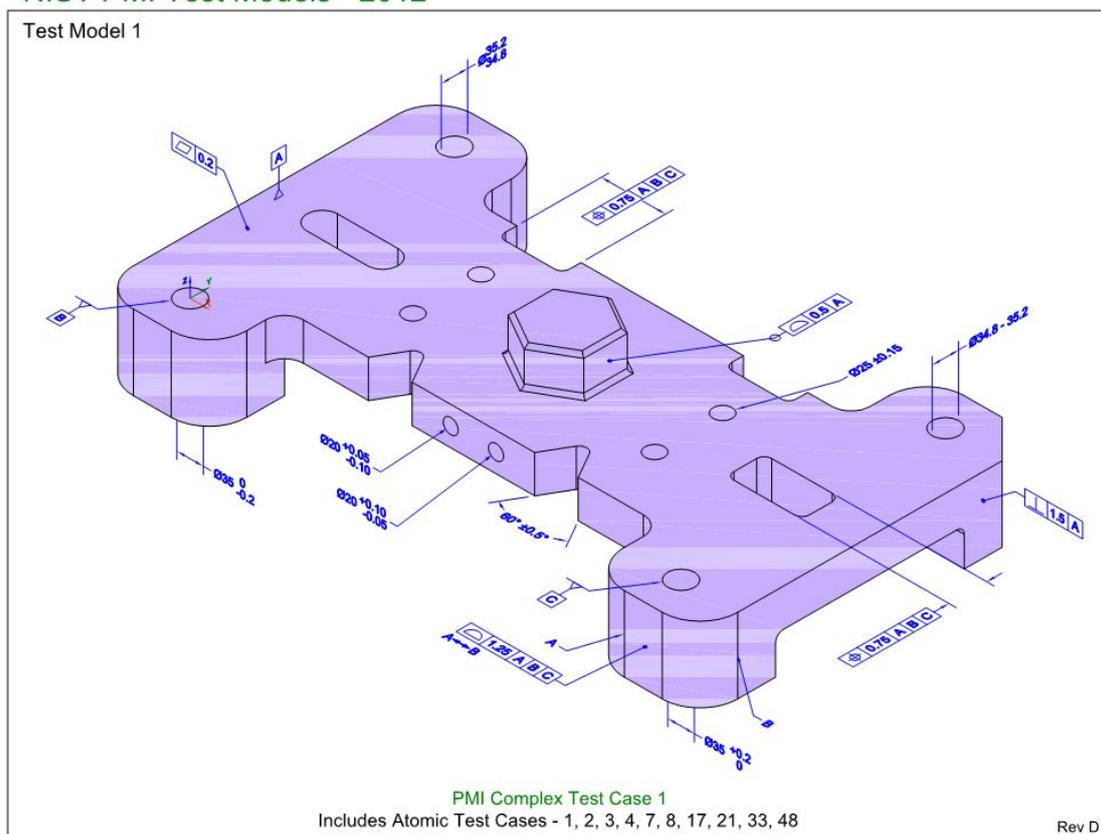
In order to reduce the workload for the participating vendors, not all eleven models shall be tested in Round 42J. The following five models have chosen:

- CTC 2 & 5
- FTC 6, 8 & 9

This selection still covers a wide range of PMI elements, while reducing the number of exchanged to be done for each interface vendor. The models are indicated with a label below.

The illustrations below show the first page of the PDF document for each test model.

### NIST PMI Test Models - 2012







### NIST PMI Test Models - 2014

NOTES (UNLESS OTHERWISE SPECIFIED):

- CAD MODEL \_\_\_\_\_ REV. \_\_\_ IS REQUIRED TO COMPLETE PRODUCT DEFINITION.
- DIRECTLY-TOLERANCED DIMENSIONS AND BASIC DIMENSIONS DEFINED ON THE DRAWING TAKE PRECEDENCE OVER DIMENSIONAL DATA DEFINED BY THE MODEL. OBTAIN ALL OTHER DIMENSIONAL DATA FROM THE MODEL. THE MODEL REPRESENTS BASIC DIMENSIONAL DATA UNLESS OTHERWISE SPECIFIED.
- APPLICABLE STANDARDS:  
 ASME Y14.41-2003 APPLIES TO DATASET.  
 ASME Y14.5M-1994 APPLIES TO DIMENSIONING AND TOLERANCING.
- $\text{[Symbol: Flatness]} .05 \text{ [A] [B] [C]}$  APPLIES TO ALL UNTOLERANCED SURFACES.
- UNITS: INCHES

Feature and Specification Index

R43J

**PMI Fully-Toleranced Test Case 6 - View A**  
 Includes Atomic Test Cases - 52, 53, 72, 87, 88, 89

Rev D

nist\_ftc\_06\_asme1\_rd

### NIST PMI Test Models - 2014

NOTES (UNLESS OTHERWISE SPECIFIED):

- CAD MODEL \_\_\_\_\_ REV. \_\_\_ IS REQUIRED TO COMPLETE PRODUCT DEFINITION.
- DIRECTLY-TOLERANCED DIMENSIONS AND BASIC DIMENSIONS DEFINED ON THE DRAWING TAKE PRECEDENCE OVER DIMENSIONAL DATA DEFINED BY THE MODEL. OBTAIN ALL OTHER DIMENSIONAL DATA FROM THE MODEL. THE MODEL REPRESENTS BASIC DIMENSIONAL DATA UNLESS OTHERWISE SPECIFIED.
- APPLICABLE STANDARDS:  
 ASME Y14.41-2003 APPLIES TO DATASET.  
 ASME Y14.5M-1994 APPLIES TO DIMENSIONING AND TOLERANCING.
- $\text{[Symbol: Flatness]} .06 \text{ [A] [B] [C]}$  APPLIES TO ALL UNTOLERANCED SURFACES.
- FEATURES IDENTIFIED AS STATISTICALLY TOLERANCED (ST) SHALL BE PRODUCED WITH STATISTICAL PROCESS CONTROLS OR TO THE MORE RESTRICTIVE ARITHMETIC LIMITS SPECIFIED. DETAILED PROCESS PLAN NEEDED TO COMPLETELY DEFINE STATISTICAL PARAMETERS AND REQUIREMENTS.
- UNITS: INCHES

Feature and Specification Index

nist\_ftc\_07\_asme1\_rd\_fsi.pdf

**PMI Fully-Toleranced Test Case 7 - View A**  
 Includes Atomic Test Cases - 84, 85

Rev D

nist\_ftc\_07\_asme1\_rd

### NIST PMI Test Models - 2014

NOTES (UNLESS OTHERWISE SPECIFIED):

- CAD MODEL \_\_\_\_\_ REV. \_\_\_\_ IS REQUIRED TO COMPLETE PRODUCT DEFINITION.
- DIRECTLY-TOLERANCED DIMENSIONS AND BASIC DIMENSIONS DEFINED ON THE DRAWING TAKE PRECEDENCE OVER DIMENSIONAL DATA DEFINED BY THE MODEL. OBTAIN ALL OTHER DIMENSIONAL DATA FROM THE MODEL. THE MODEL REPRESENTS BASIC DIMENSIONAL DATA UNLESS OTHERWISE SPECIFIED.
- APPLICABLE STANDARDS:  
 ASME Y14.41-2003 APPLIES TO DATASET.  
 ASME Y14.5M-1994 APPLIES TO DIMENSIONING AND TOLERANCING.
- $\text{[Surface Symbol]} \text{[Tolerance]} \text{[A|B|C]}$  APPLIES TO ALL UNTOLERANCED SURFACES.
- DIMENSIONING AND TOLERANCING APPLY WITH PART RESTRAINED AS FOLLOWS, EXCEPT AS INDICATED.  
 PLACE DATUM FEATURE A AGAINST DATUM FEATURE SIMULATOR A.  
 ENGAGE DATUM FEATURES B AND C WITH DATUM FEATURE SIMULATORS B AND C RESPECTIVELY.  
 APPLY LOAD TO PART TO RESTRAIN DATUM FEATURE A AGAINST ITS SIMULATOR.  
 DETAILED INSPECTION PLAN NEEDED TO COMPLETELY DEFINE RESTRAINT.
- UNITS: INCHES

Feature and Specification Index  
R43J

PMI Fully-Toleranced Test Case 8 - View A  
 Includes Atomic Test Cases - 66, 90

Rev C

nist\_ftc\_08\_asme1\_rc

### NIST PMI Test Models - 2014

NOTES (UNLESS OTHERWISE SPECIFIED):

- CAD MODEL \_\_\_\_\_ REV. \_\_\_\_ IS REQUIRED TO COMPLETE PRODUCT DEFINITION.
- DIRECTLY-TOLERANCED DIMENSIONS AND BASIC DIMENSIONS DEFINED ON THE DRAWING TAKE PRECEDENCE OVER DIMENSIONAL DATA DEFINED BY THE MODEL. OBTAIN ALL OTHER DIMENSIONAL DATA FROM THE MODEL. THE MODEL REPRESENTS BASIC DIMENSIONAL DATA UNLESS OTHERWISE SPECIFIED.
- APPLICABLE STANDARDS:  
 ASME Y14.41-2003 APPLIES TO DATASET.  
 ASME Y14.5M-1994 APPLIES TO DIMENSIONING AND TOLERANCING.
- DIMENSION AND TOLERANCE VALUES SHOWN IN SQUARE BRACKETS [XXX] ARE MILLIMETERS.
- MATERIAL: (.1195 THICK) 11 GA 304 SST SHT, ASTM A240.
- UNITS: INCHES

Feature and Specification Index  
R43J

PMI Fully-Toleranced Test Case 9 - View A  
 Includes Atomic Test Cases - 59, 61

Rev D

nist\_ftc\_09\_asme1\_rd

### NIST PMI Test Models - 2014

NOTES (UNLESS OTHERWISE SPECIFIED):

- CAD MODEL \_\_\_\_\_ REV. \_\_\_ IS REQUIRED TO COMPLETE PRODUCT DEFINITION.
- DIRECTLY-TOLERANCED DIMENSIONS AND BASIC DIMENSIONS DEFINED ON THE DRAWING TAKE PRECEDENCE OVER DIMENSIONAL DATA DEFINED BY THE MODEL. OBTAIN ALL OTHER DIMENSIONAL DATA FROM THE MODEL. THE MODEL REPRESENTS BASIC DIMENSIONAL DATA UNLESS OTHERWISE SPECIFIED.
- APPLICABLE STANDARDS:  
 ASME Y14.41-2003 APPLIES TO DATASET AND MOVABLE DATUM TARGETS.  
  
 ASME Y14.5M-1994 APPLIES TO DIMENSIONING AND TOLERANCING.
- FULL DIAMETER OF EACH INDICATED HOLE MUST INTERSECT WITH THE CROSS-DRILLED HOLE AT ITS BOTTOM. INDICATED HOLES MUST NOT CONTACT FAR SIDE OF CROSS-DRILLED HOLES.
- $\text{1.5} | A | B | C$  APPLIES TO ALL UNTOLERANCED SURFACES.
- UNITS: MILLIMETERS

Feature and Specification Index  
 nist\_ftc\_10\_asme1\_rb\_fsi.pdf

PMI Fully-Toleranced Test Case 10 - View A  
 Includes Atomic Test Cases - N/A

Rev B

nist\_ftc\_10\_asme1\_rb

### NIST PMI Test Models - 2014

NOTES (UNLESS OTHERWISE SPECIFIED):

- CAD MODEL \_\_\_\_\_ REV. \_\_\_ IS REQUIRED TO COMPLETE PRODUCT DEFINITION.
- DIRECTLY-TOLERANCED DIMENSIONS AND BASIC DIMENSIONS DEFINED ON THE DRAWING TAKE PRECEDENCE OVER DIMENSIONAL DATA DEFINED BY THE MODEL. OBTAIN ALL OTHER DIMENSIONAL DATA FROM THE MODEL. THE MODEL REPRESENTS BASIC DIMENSIONAL DATA UNLESS OTHERWISE SPECIFIED.
- APPLICABLE STANDARDS:  
 ASME Y14.41-2003 APPLIES TO DATASET.  
  
 ASME Y14.5M-1994 APPLIES TO DIMENSIONING AND TOLERANCING.
- NON-RIGID PART. DIRECTLY-TOLERANCED DIMENSIONS AND TOLERANCES APPLY IN FREE STATE.
- UNITS: MILLIMETERS

Feature and Specification Index  
 nist\_ftc\_11\_asme1\_rb\_fsi.pdf

PMI Fully-Toleranced Test Case 11 - View A  
 Includes Atomic Test Cases - 55, 100

Rev B

nist\_ftc\_11\_asme1\_rb

## Annex C Composite Data model for Rosette Type 2

This section gives some additional information provided by Dassault Systèmes on the CO3 test case, see section 2.6.

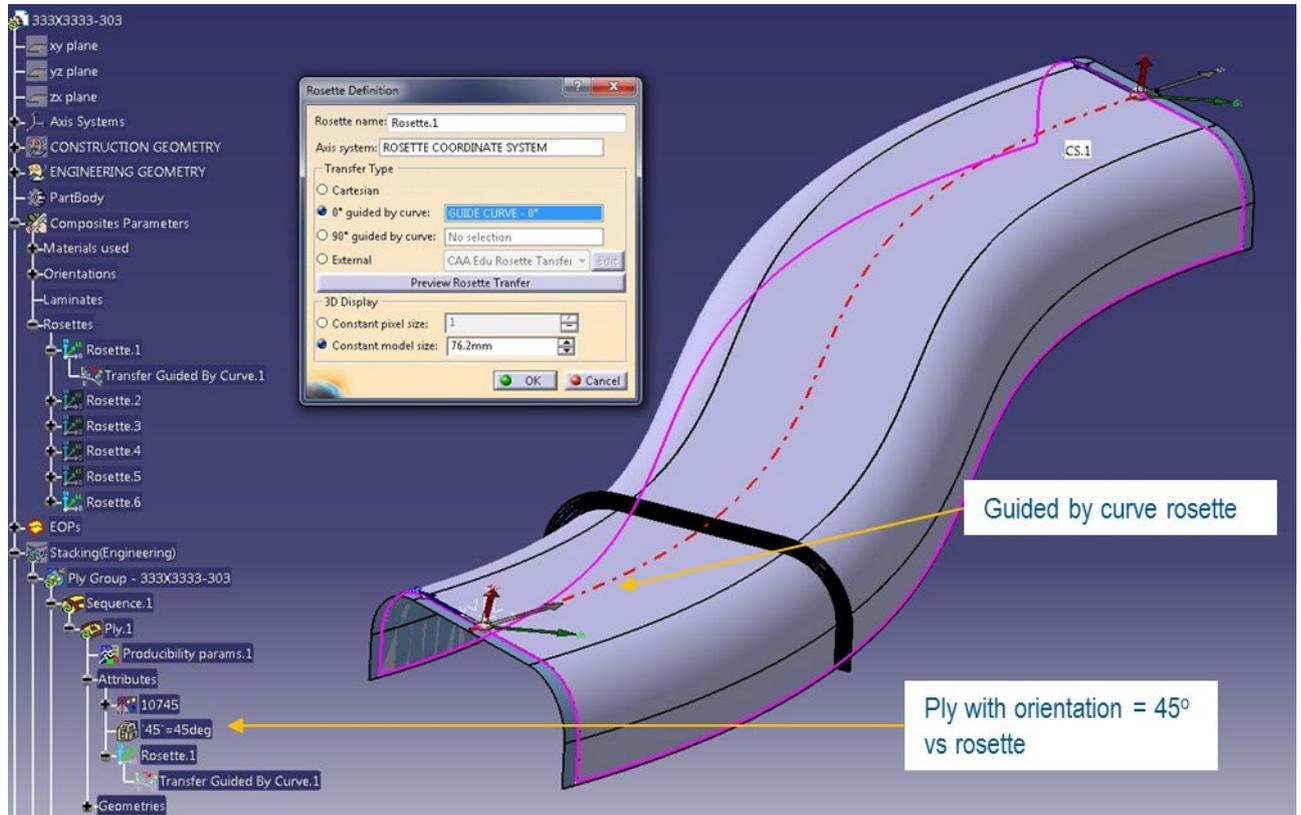


Figure 7: ASME\_Y14.37\_RosetteType2.CATPart

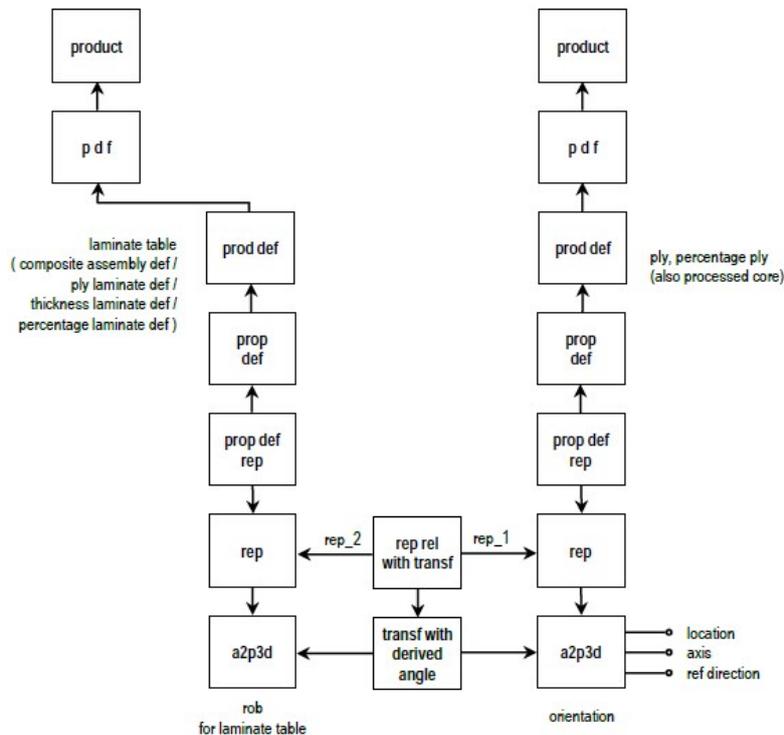
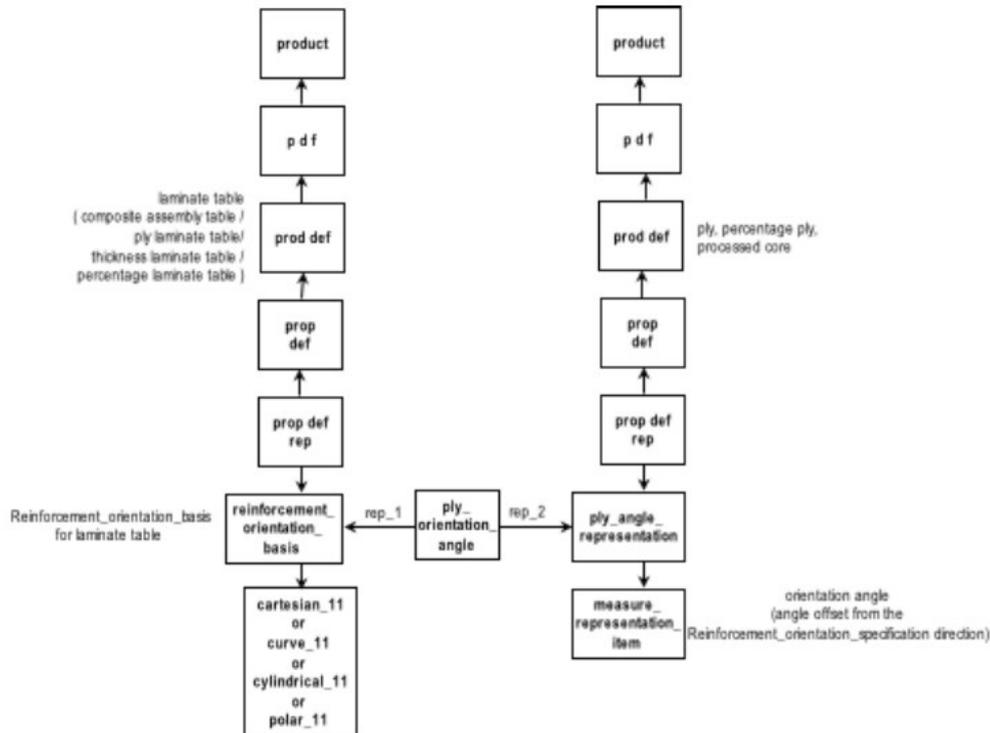


Figure 15: Ply Orientation by Simple Rosette

Figure 8: Old Recommendation from AP203e2

In AP203 Edition, the 2<sup>nd</sup> axis2\_placement\_3d provided the orientation angle (same axis, angle between ref\_directions (= x-axis)) as shown in Figure 8 above. However, this only works for cartesian rosette.

In AP242e2, the orientation angle is explicitly defined, as shown in Figure 9 below. This works for cartesian, curve guided, cylindrical, polar etc. rosettes.



**Figure 15: Ply Orientation Angle by Cartesian Placement, Curve, Cylindrical, or Polar 11 Basis Direction**

*Figure 9: New Recommendations AP242 E2*

The new entities developed to support this are described below. They are contained in the “AP242 Edition 1 MIM Longform EXPRESS Schema with Composite Patch”, which is available in the CAX-IF member area under “Information on Round 40J of Testing”.

```

ENTITY reinforcement_orientation_basis
    SUBTYPE OF (representation);
    SELF\representation.items : SET[1:1] OF basis_11_direction_member;
END_ENTITY;

TYPE basis_11_direction_member = SELECT
    (cartesian_11,
     curve_11);
END_TYPE;

ENTITY cartesian_11
    SUBTYPE OF (geometric_representation_item);
END_ENTITY;
    
```

```
ENTITY cartesian_1l
  SUBTYPE OF (geometric_representation_item);
END_ENTITY;

ENTITY curve_1l
  SUBTYPE OF (geometric_representation_item);
END_ENTITY;

ENTITY ply_angle_representation
  SUBTYPE OF (representation);
  self\representation.items : SET [1:1] OF measure_representation_item;
END_ENTITY;

ENTITY ply_orientation_angle
  SUBTYPE OF (representation_relationship);
  SELF\representation_relationship.rep_1 : reinforcement_orientation_basis;
  SELF\representation_relationship.rep_2 : ply_angle_representation;
END_ENTITY;

ENTITY draped_orientation_angle
  SUBTYPE OF (ply_orientation_angle);
END_ENTITY;

ENTITY laid_orientation_angle
  SUBTYPE OF (ply_orientation_angle);
END_ENTITY;
```