



IBM Cúram Social Program Management

Cúram Online Help System Development and Deployment Guide

Version 6.0.4

Note

Before using this information and the product it supports, read the information in Notices at the back of this guide.

This edition applies to version 6.0.4 of IBM Cúram Social Program Management and all subsequent releases and modifications unless otherwise indicated in new editions.

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Chapter 1

Introduction

1.1 Introduction

Welcome to the Cúram Online Help System Development and Deployment Guide.

1.2 About This Guide

The Cúram Online Help system allows for the embedding of help information in the Cúram client. The help system can be customized and built into HTML help format to be deployed with the Cúram application. This guide describes the structure of the help system, how to customize it, and how to build and deploy it.

1.3 Who Should Read This Guide?

This guide is intended for all those who will be developing the Cúram Online Help System using the tools provided by IBM Corporation, or deploying an application including online help.

1.4 Prerequisites

This guide assumes the that reader is familiar with:

- Starting a command prompt and running DOS commands
- The basics of Cúram application development
- Using a text editor

Chapter 2

Key Features of Cúram Online Help

2.1 Introduction

The Cúram Online Help System has a number of key features that simplify the development and use of the online help. The following subsections describe these features.

2.2 Support for Multiple Content Types

The help framework is composed of the help entries that are located within the application property files. These entries provide help about specific properties – i.e., fields and actions – in the application. Within property files, help entries are situated on the line immediately following the corresponding property. When the online help output is generated, the property entries and corresponding help entries are listed side-by-side in an easy-to-understand table format.

2.3 Help Tools

The help generation tools are composed of scripts and custom tools that assist in help generation.

The help toolset is incorporated within the Cúram application development environment. This means that no extra tools are needed to develop online help, and no additional third-party software is required.

These tools perform the following tasks:

- Create “starter” help files for newly created application pages - these files contain blank help entries for new application properties
- Build preview pages that display help output in the same window as the associated application page

- Build the help system, either a full build, or a quicker build which updates help content that has changed
- Transform help entries into DocBook XML format



Important

The building of the help system is currently only supported for Windows-based platforms. However, the system may be deployed on any platform supported by Cúram.

2.3.1 DocMaker

DocMaker is a custom-built Cúram tool that renders DocBook XML into an online help format.

2.4 Single Source Development

The online help is developed within application property files. Each application property contained in a property file is immediately followed by a corresponding help entry. This enables help developers to easily compare and update application properties and help entries. In addition, having application properties and help within the same file removes the need to maintain and synchronize a separate set of files for the help system.

2.5 Integrated Localization

Online help localization is integrated with application localization. When localized properties files are created for a particular locale, those properties files will contain localized entries for both the application properties and the application help. For more information on localizing the help, see Section 4.6, *Help Localization*.

2.6 Automatic Generation

Once the help content is added into the relevant property files, the Cúram Online Help System can be generated automatically by running the appropriate command. For a summary of the online help build commands, see Section 4.3, *Build Targets*.

Automatic Generation ensures that:

- Help developers do not need to spend time on boilerplate text or formatting
- Help pages automatically appear consistent

2.7 Full-Featured Help Applet

The final output format of the online help is a help applet that contains many user-friendly features. Access to each help page is provided in a context-sensitive manner; i.e., when a user presses the help icon on an application page, the help applet links directly to the corresponding help page.

In addition the help applet includes a search tool which allows users to perform full-text and partial-text searches on help for application pages.

2.8 Accessibility Features

Cúram online help contains accessibility features that enable the help to be accessed by users with disabilities. The following accessibility features are used:

Alternative Text

Alternate text allows screen readers to provide additional descriptions for non-text elements. Alternate text is provided for all help links and help buttons.

Keyboard Functionality

Keyboard functionality allows the help to be accessed via key commands (rather than a mouse or pointing device). For information on using a keyboard to navigate the help system, see Section 6.4, *Using the Keyboard to Navigate the Help Applet* .

Chapter 3

Cúram Online Help Development

3.1 Introduction

This chapter contains all the information essential to developing the Cúram Online Help System. It describes:

- The format of the online help source
- How to use the tools to begin creating help
- How to update help

It also gives some tips regarding viewing and testing the help outside the scope of a deployed application.

3.2 Elements of Online Help

3.2.1 Introduction to Cúram Client Pages

Full Cúram developer knowledge is not necessary to develop Cúram Online Help content, but a basic familiarity with the development structure is required. Client pages are installed in the `webclient/components` directory of the Cúram installation. Each page has a UIM (User Interface Metadata) file associated with it that defines its content - links, buttons, fields. The UIM file does not contain any actual text - it uses externalized properties files, which map property names to text strings. UIM files may also import VIM files. VIM files are in the same format as UIM files, they basically define a fragment of a UIM file. They also have properties files. The association between the UIM/VIM and the property file is simple - they have the same name, apart from the file extension.

The format of client pages is described fully in the *Cúram Web Client Reference Manual*.

The online help content is composed of extra entries embedded in client property files (the advantages of this are described in Chapter 2, *Key Features of Cúram Online Help*). Properties are lines of text of the form:

```
PropertyName=Value of Property
```

If a button on a page is labeled in the UIM file with the property `Button.Save`, the following properties file entry will exist

```
Button.Save=Save
```

To explain this in the online help, create another property called `Button.Save.Help`

```
Button.Save.Help=Use this button to save.
```

The online help tools are responsible for generating this into the online help format. The rest of this chapter describes fully the structure of the help content.

3.2.2 Page Descriptions

Use the `Help.PageDescription` property to provide a high-level overview of what the page is for. This should not be used to provide details for each field or button - this can be done elsewhere.

```
Help.PageDescription=This page allows you to view a clause record. Clauses describe the precedents for a decision made on an appeal and the legal articles that affect it. These clauses can be dynamically inserted into decision documents.
```

3.2.3 Links and Actions

If there are any labeled links or action controls on the page, a help entry can be provided with a description for them. When creating help entries, the online help system will create a table for them, complete with title and abstract.

```
ActionControl.Label.Save=Save  
ActionControl.Label.Save.Help=The Save action creates a new record from the information entered on the page.
```

3.2.4 Fields and Columns

Help entries can also be provided for labeled fields or columns on a page. The online help system will generate a separate table for these help entries.

```
Field.Label.Language=Language  
Field.Label.Language.Help=The language for the clause from the drop-down list of languages, e.g., English, French.
```

3.2.5 Table Abstracts

The tables for the links and actions and fields and columns have default table abstracts for accessibility reasons. The default values are simply "Links and Actions" and "Fields and Columns".

These abstracts can be overridden for a page to provide a more useful summary. Use the properties:

```
Help.Fields.Abstract  
Help.Links.Abstract
```

```
Help.Links.Abstract=Standard set of Save and New buttons.  
Help.Fields.Abstract=Describes fields related to creating  
a new Clause.
```



Note

Note that these properties are not generated by starter help or added in by any tools. If they are not present, the help will contain the default table abstracts.

3.3 Creating Help

The Online Help system contains some tools for generating help for pages which do not have any. They can be used when creating new client pages while customizing the application. They create a new version of the .properties file with an initial set of help properties (which should then be copied over the existing file and update).

For instance, say there is a new page located at webclient/components/custom/NewPage.uim with a properties file webclient/components/custom/NewPage.properties and online help is required for it.

Run the help.starter command and open the directory webclient/build/help/starter/custom.

Two files should be visible:

```
NewPage.properties
```

```
NewPage.properties.unlabeledactioncontrols
```

NewPage.properties will be the same as the original file except with the addition of:

```
Help.PageDescription
```

and for each property X that already existed in the file, a property called X.Help (except for titles, which do not require help).

Copy this file over the existing properties file and replace the help starter text (Double_click_to_enter_text) with the actual help text. If help is not required for a particular link, button, field or column, just remove the starter

help property entry.

NewPage.properties.unlabeledactioncontrols may be empty, in which case it can be ignored. If it is not, then it means that the UIM file has one or more action controls that have an associated image but not a label. The unlabeledactioncontrols file lists the images which cannot be used to identify such action controls on the page. To associate help with these action controls, add a label to the action control in the UIM file, then add it and the help property to the .properties file (or regenerate the starter help as above).

3.4 Updating Help

It is easy to update help for pages which already have some help content, as no commands are required. Help can also be added for any new properties within the existing property file. However before updating online help it is important to read the chapter on 'Domain Specific Controls' in the Cúram Web Client Reference Manual.

3.4.1 Updating Help for non 'Domain Specific Controls'

In order to update the online help, the following steps should be followed:

1. Identify the correct property file to edit, in order to update the online help:

The help text for a particular page in the application is contained in the property file with the same name. For example, if the online help for the 'Person Search' in the application needs to be updated then this means that some property/properties referenced by the Person_search.uim file will have to be customized. In this case, these properties are contained in a file named Person_search.properties.

2. Location where to update online help

The property file that is being updated should be modified in the 'webclient/components/custom' directory only. E.g. If the 'webclient/components/core/Person/Search/Person_search.properties' needs to be updated, then copy this file straight in to the 'webclient/components/custom' directory. The 'Person/Search' directories don't need to be created in the custom directory.

3. Modify the relevant property file as described in the earlier sections of this chapter.
4. Build the online help using the following build command in the webclient folder: build help.build.



Note

The online help build requires that successful client and server builds have been run. A summary of all the help related command line arguments can be found in the table, in the next

chapter.

5. Viewing the updated help in the application.

Re-deploy the help, this is described in the next chapter. Refresh the project, restart the servers, launch the application and navigate to the web-page that has been updated.



Note

The online help can also be tested locally rather than having to view the changes in the application. Refer to Section 5.2, *Testing the Help Locally* for more information on how to test the online help locally.

3.4.2 Updating Help for 'Domain Specific Controls'

The address elements for a particular type of address would be a good example of a Domain Specific Control. The field elements that are displayed on a page in the application depend on the locale that is specified. For instance the format of the address elements displayed for an address in the US would be different from those displayed in the UK. For this reason, the online help cannot be specified for each of the elements within an address. For example, in the 'Register Employer' page in the application there is a registered address and a business address. The name of the properties file which relates to this page is *Employer_registerView.properties*. In order to update the online help regarding the Employer's business address and registered we could add help properties as follows:



Note

Look at the comments for adding help properties regarding the registered and business address

```
# ADDING HELP HERE FOR REGISTERED ADDRESS
Field.Label.RegisteredAddress.Help=The Employer can enter their
registered address in the fields displayed. The format of the
Employers registered address will depend on the Country in which
they reside.
Field.Label.BusinessAddress=Business Address
# ADDING HELP HERE FOR BUSINESS ADDRESS
Field.Label.BusinessAddress.Help=The Employer can enter their
business address in the fields displayed. The format of the
Employers business address will depend on the Country in which
they reside.
```

Chapter 4

Building and Deploying the Online Help System

4.1 Introduction

This chapter discusses how to build the help system, both for the purposes of checking modifications to the help content and for deploying the help.

4.2 Installation and Prerequisites

The Cúram Online Help System is generated from the same files as the Cúram client application. To build the help system for deployment requires that the Cúram client is first built. The client in turn requires the Cúram server to be built as a prerequisite.

At a minimum, *Apache Ant* and *Oracle Java* must be installed. An integrated development environment, modelling tools, or a database are not required if using a Cúram installation solely for creating online help. For information on installing Cúram, see the *Cúram Installation Guide*.

Refer to the Cúram server and client development guides for instructions on configuring properties and building the client and server.

4.3 Build Targets

The main target for building the Cúram help output is **help.build**, which is invoked from the webclient project. The output of this target is the default help.war file, located in the webclient\build\help\war directory.

The following table is a summary of the build targets for the Cúram Online Help System:

Target	Description	When this target should be run
help.build	Builds the online help for deployment with an application.	When a full build is needed in order to produce help for deployment (or testing). The help output is copied to the webclient\build\help\multivolumehelp\output\help folder, and the help.war is copied to webclient\build\help\war.
help.html	Builds HTML preview pages. These pages are an approximation of the fully built help output and this target is a convenience to save time. The HTML help pages are the pages seen from the checker pages, described below.	Run if using help checker pages and have updated the content.
help.checker	Build 'checker' pages (previews and HTML) which allows the page preview to be viewed side-by-side with HTML help preview pages. The checker pages can be found in the webclient/build/help/checker folder.	Run once initially and rerun when new pages are added. Remember to also run the help.html target, and the client-with-previews CDEJ target (requires server application to be built).
help.starter	Builds starter help pages. See more complete description in the Section 3.3, <i>Creating Help</i> link.	When creating 'starter' help for pages that did not previously have help.

Table 4.1 Documentation Center Build Targets

4.4 Deployment

Once help has been customized and built, the next step is to deploy it into a running application.

When building the application for deployment in an application server this order of targets should be used:

- The Cúram server
- The Cúram client
- The Cúram Online Help system
 - When building online help for multiple locales, multiple help builds are required for each locale, in addition to an extra build setting. See Section 4.6, *Help Localization* .
- The Cúram ear file
 - When building the Cúram ear file if the help content has been previously built, it is automatically picked up and a CuramHelp.ear file is created. Alternatively, an application server specific help EAR target is available.

Building Cúram is beyond the scope of this document, but the *Cúram Server Developers' Guide* and the *Cúram Deployment Guides* for the supported platforms contain more information on the subject.

4.4.1 Deploy Curam Help EAR Application

The target to install Curam Help application (in the form of an EAR file) is **installapp** and requires the following options:

- `-Dserver.name`
The name of the server to install the application on.
- `-Dear.file`
The fully qualified name of the EAR file to install.
- `-Dapplication.name`
The name of the Cúram Help application.

```
build installapp
-Dserver.name=CuramServer
-Dear.file=D:/ear/CuramHelp.ear
-Dapplication.name=CuramHelp
```

Example 4.1 Example of Usage

4.5 Accessing Help

In a deployed application, help is accessed using the help link from the main application banner or from the help link in the content area of a tab. For English users (en, en_GB, en_US) the default help URL is used, e.g. `http://machine:port/help/index.html` .

For non-English users, e.g. de or fr_CA, a locale specific URL is used, e.g. `http://machine:port/help_de/index.html` . See Section 4.6, *Help Localization* for more information.

4.6 Help Localization

4.6.1 Introduction

The default locale for Cúram is en_US. Unless otherwise specified (using the instructions in the following sections), this is the locale in which online help will be built. The following sections describe how to localize online help content for other languages and subsequently deploy it.



Note

The instructions in the following sections are for adding additional locales to online help other than the Cúram default locale. Any reference to “for each locale” in the following instructions only refers to the additional locales, not the default. For example, if online help is required for en_US, fr_CA, and de locales, only use the following instructions for the fr_CA and de locales.

4.6.2 Localizing the Page Specific Help

Specifying page help in client properties files is described in Section 3.2, *Elements of Online Help* . To localize page specific help, create a locale specific version of the properties file by using an underscore and the locale as a suffix. For example, `Person_home_fr_CA.properties` for the “fr_CA” locale. Update each property in the file with the locale specific text.

4.6.3 Localizing Online Help Tools Resources

There are additional resources provided by the tools used to build and generate online help content that also need to be localized. For example, the text on the buttons used for navigating and searching through online help. These resources vary in type including DocBook XML, properties files and HTML files. The following sections describe each of these different resources and how they are localized.

The `<helptools_110n>` reference in the following sections refers to the directory where the help tools localized content can be placed. There are two options for this directory:

1. The content can be placed in the `webclient\helptools_110n\` directory.

When this directory is used, all the localized content is combined under the one folder structure.

- The content can also be placed in the `webclient\helptools\helptools_110n\<locale>` directory. Where `<locale>` indicates the language being localized.

When this directory is used, each `<locale>` folder contains the content specific to that locale only.



Note

Where the `webclient\helptools_110n` directory exists, it will always be used in preference to the `webclient\helptools\helptools_110n\<locale>` directories.

Default DocBook XML

The following instructions describe how to localize customizations to default DocBook XML resources.

- Create the following folder structure:
`<helptools_110n>\docbook\default`.
- Copy the following files to the newly created folder:

```
%DOCMAKER_HOME%\lib\docbook-xsl\common\110n.dtd
%DOCMAKER_HOME%\lib\docbook-xsl\common\110n.xml
```

- The Cúram DocMaker tool is based on the DocBook standard. DocBook tools come with resources localized into a number of languages. For each additional locale being added to the online help build, copy the appropriate file from `%DOCMAKER_HOME%\lib\docbook-xsl\common` to `<helptools_110n>\docbook\default` and rename the file to match the locale *exactly*. For example for the `fr_CA` locale, copy `%DOCMAKER_HOME%\lib\docbook-xsl\common\fr.xml` to `<helptools_110n>\docbook\default\fr_CA.xml`. The language attribute of the root element must be updated to match the locale code also. The file can then be left as-is or updated if further customizations are required. If a DocBook file is not available for the locale being added, copy, rename and localize the English version (`en.xml`). The text can be customized or localized by changing the text attribute of the `gentext` elements.
- Update `<helptools_110n>\docbook\default\110n.xml` so that it contains only references to the XML files for each locale in the build. For example, note the ENTITY declaration and subsequent `&fr_CA` inclusion in the following example:

```
<?xml version='1.0'?>
<!DOCTYPE l:i18n SYSTEM "110n.dtd" [
<!ENTITY fr_CA SYSTEM "fr_CA.xml">
]>
<l:i18n xmlns:l="http://docbook.sourceforge.net/xmlns/110n/1.0">
&fr_CA;
</l:i18n>
```

Cúram DocBook XML

The following instructions describe how to localize Cúram specific customizations to DocBook text resources.

1. Create the following folder structure:
`<helptools_110n>\docbook\curam.`
2. Copy the following file to the newly created folder:
`%DOCMAKER_HOME%\lib\xsl-custom\common\110n.xml`
3. Change the language attribute of the 110n element to the appropriate locale. The text can be localized by changing the text attribute of the gentext elements. To add additional locales, copy the entire 110n element and repeat this step to localize the text.

Miscellaneous Online Help User Interface resources

The following instructions show how to localize various resources that make up the online help user interface. For example, button text for is displayed when navigating and searching through online help.

1. Create the following folder structure
`<helptools_110n>\properties\curam\docmaker\tools\help.`
2. Extract HelpUI.properties from
`%DOCMAKER_HOME%\lib\help-applet.jar` and place it in the newly created folder.
3. Rename the file to create a locale specific version using an underscore and the locale as a suffix. e.g. HelpUI_fr_CA.properties for the fr_CA locale. Repeat this for each locale.
4. Update the properties in each properties file.
5. Create the following folder structure
`<helptools_110n>\properties\curam\help\tools\anttasks.`
6. Extract message.properties from
`%CURAMCDEJ%\lib\curam\jar\helptools.jar` and place it in the newly created folder.
7. Rename the file to create a locale specific version using an underscore and the locale as a suffix. e.g. message_fr_CA.properties for the fr_CA locale. Repeat this for each locale.
8. Update the properties in each properties files.
9. Create the following folder structure
`<helptools_110n>\template\<locale>` for each locale. For

example, `<helptools_110n>\template\fr_CA` for the `fr_CA` locale.

10. Copy the files from `webclient\helptools\template` to the newly created folder for each locale. These files are partial DocBook templates used when generating online help. Update the text in each appropriately for each locale.
11. Create the following folder structure `<helptools_110n>\web\<locale>` for each locale. For example, `<helptools_110n>\web\fr_CA` for the `fr_CA` locale.
12. Copy the following files from DocMaker installation to the specified newly created folder `help-logo.html` and `help-splash.html`. Then create a further sub folder `\images` and copy the following files into it `green-logo.gif`, `help-splash.gif`. These files are partial DocBook templates used when generating online help. Update the text in each appropriately for each locale.

4.6.4 Building and Deploying Online Help for multiple locales

For each additional locale to be built the **help.build** target should be invoked, passing an additional parameter `prp.help.locale`. For example

```
build help.build -Dprp.help.locale=fr_CA
```

This target will use the localized files, as described in the previous sections, and create a separate help war file. This file is located in the `webclient\build\help\war` directory and will contain the locale in the file name, e.g. `help_fr_CA.war`.



Note

The localisation of online help does not support any fallback mechanism. As a result, if users have a mix of both `fr` and `fr_CA` locales, an online help war will need to be built for both locales.

Once all localized versions of help have been built, including the default, the `CuramHelp.ear` can be created as described in Section 4.4, *Deployment*. The `CuramHelp.ear` file packages up all `help.war` files, including the locale specific ones, and contains the necessary information to deploy all localized online help applications. For each locale deployed, the context root of the help is set to `/help_<locale>`, e.g. `/help_fr_CA`.

For non-English users, their default locale is used when accessing the help URL, which ensures the correctly localized help is presented. For English users (`en`, `en_US` and `en_GB`), the default help URL is used.



Note

As mentioned previously, the default help locale is `en_US` and all English users (`en_US`, `en` and `en_GB`) are directed to this default

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help. If a default help in another locale is required the - **Ddefault.help.build=true** setting can be used.

Chapter 5

Testing the Help

5.1 Introduction

The Cúram Online Help System can be tested in two ways. It can be tested locally on a machine, which is a quick process allowing testing of the new help content without having to build a full help system. Alternatively, help can be tested fully by building the Cúram help applet.

5.2 Testing the Help Locally

There are two options for testing the help locally on a machine. The first option is to run the target **help.html** . This will output the HTML help pages in the `webclient/build/help/html` folder in a structure similar to the source files. This content can be browsed and any help pages can be directly opened to test the help content. Remember to build the client fully first.

The second option is to run the target **help.checker** . This will output a view of the HTML help alongside a view of a screen preview for the application page that the help content describes. This allows for a more thorough testing of the help; however, it takes longer to build because a full server and client-with-previews build must first be performed. The target **help.html** must be run before running **help.checker** . The checker pages can be found `web-client/build/help/checker` folder.

5.3 Testing with the Help Applet

Later in the project cycle to test the full help system as it would be deployed in the application, build the Cúram help applet as described in Chapter 4, *Building and Deploying the Online Help System* .

Once the build has completed, open the help by going to the URL, `web-client/`

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`build/help/multivolumehelp/output/help/index.html` .

Then add to the URL in the web browser the “?” character followed by the name of the help page to test.

For example, to test the page, `Activity_acceptRecurringInvitation.uim`, use something like:

```
c:/Curam/webclient/build/help/multivolumehelp/output/  
help/index.html?Activity_acceptRecurringInvitation.
```

Chapter 6

Using the Help System

6.1 Introduction

The online help system is designed to be simple and accessible to use. It is composed of two major parts: a set of HTML pages containing the help content on the right side of a browser, and a navigation applet, the most of which is on the left side of a browser, with some navigation features above the help content.

The following subsections provide specific information related to accessing and using the help system.

6.2 Context Sensitivity

The help is context-sensitive, meaning that when first accessed from a particular application page the help related to that page is displayed. The Cúram application provides a link to the help system from each page of the application, via the question-mark icon on the top right hand corner of the content panel of a tab. If no help can be found for the page, which should rarely be the case, it will default to the title page for the help applet.

6.3 Navigation in the Cúram Help Applet

The Cúram Help Applet contains a Search pane displayed on the left-hand side of the applet. The Search pane allows users to perform full-text and partial-text searches on help for application pages.

In order to conduct a search, simply click the search tab (or, if required, access it via keystrokes) and enter the desired search term in the field provided. To locate the actual occurrence of the search text, simply select the topic in the help pane that most closely reflects the desired search result.

6.4 Using the Keyboard to Navigate the Help Applet

The keyboard can be used in a number of ways to navigate the Cúram Help Applet. The Tab key can be used to move the focus between the controls. In the Search tab, the Up and Down arrow keys can be used to select entries in the list.

Additionally, the keyboard can be used to change the size of the font used in the Cúram Help Applet: use Ctrl-- to decrease the font size and Ctrl+= to increase it.

When first accessing the Cúram Help System, the keyboard functionality is not yet activated. Any action performed with a mouse in the help system will activate the keyboard functionality. Alternatively, the keyboard functionality can be activated without the use of a mouse. The *Give Keyboard Focus to Applet* button is provided at the top of the applet frame that, when activated, will cause the input focus to change to the Cúram Help Applet. The access key for this button is A.

For accessibility purposes, each navigation feature in the Cúram Help Applet has an associated access key that can be used to change the input focus to that button without using the mouse. To activate a button using an access key, press the Alt key and the access key together to change the focus to the button and then press the Enter key. In some browsers, pressing the access key will immediately activate the link and the user will not have to press Enter.

The following is a list of the access keys for the Cúram Help System navigation features:

Previous Page

The access key for this button is P.

Next Page

The access key for this button is N.

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