VueLink for Open Text

An Integration between AutoVue Client-Server Edition and

Open Text Livelink

User Manual

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Introduction

VueLink for Open Text provides an interface between the Livelink package of Open Text and the AutoVue family of products. This interface enables you to add powerful viewing and Markup capabilities to your Livelink client software, in a Web browser in an intranet or the Internet.

VueLink with AutoVue or Office lets you:

• View documents of native formats.
• Mark up documents graphically using a rich set of graphical and textual tools.
• Review your own Markups and the Markups of your co-workers.

This manual is intended for VueLink users and the System Administrator or other individuals who perform the VueLink setup.

Note:

• Throughout this manual the family of AutoVue Products is referred to as AutoVue. The AutoVue family of products includes AutoVue, AutoVue Professional, AutoVue SolidModel, AutoVue SolidModel Professional and Office. These products are available in Windows, UNIX or JAVA.
• AutoVue Professional, AutoVue SolidModel Professional and Office provide Markup/annotation/redlining features. Refer to the Introduction in the online help for further information about the specific features and file formats supported by each AutoVue product.

Functional Overview

VueLink for Open Text adds document viewing and Markup capabilities to the Livelink client. VueLink provides a seamless user interface between the Livelink clients and AutoVue, and tightly integrates at both the client and the server levels. Livelink clients are supported in both client/server configuration, and intranet/Internet through a Web browser.

Markups are automatically saved in the current Library and are available for other users to edit and/or view depending on their document access level.

VueLink for Open Text and AutoVue provide you with the following powerful features and capabilities - locally or remotely via a Web browser:

- View documents securely in their native format without editing them.
- View more than 400 document formats including MS Office, PDF, and TIFF.
- Work with multiple Markup layers and files simultaneously.
- Create Markups directly on stored documents or renditions using a rich set of annotation tools.
- Create hyperlink connections to other related documents.
- Consolidate several Markup files (perhaps from different reviewers) into a single Markup file.
- Control access to Regular, Read only, Master, and Consolidated Markup files.
- Associate Markups with a specific document revision (Markups may be migrated to new revisions as required).
- Compare different revisions of engineering drawings graphically.
- Print documents with header, footers, and watermark information queried from specified document attributes.

VueLink for Open Text also provides you with a basis to which other powerful functions can be added via custom-designed tools, to further enhance your Livelink installation. Custom-designed tools offer many possibilities. For example, you could create "intelligent" custom stamps that query for information that can be included as Markups.

All these features are available from your Web browser by using Cimmetry's AutoVue Client-Server Edition.

AutoVue is fully configurable for you to customize your own tools. If you prefer, contact your account manager or our customer support representatives to discuss the possibilities of having us design a tool to meet your specific needs.

Why does the Livelink User need a Viewing and Markup Tool?

Typically, in an organization, a document has a life cycle and is routed to several people as part of a workflow cycle. The following is an example of a possible workflow cycle.
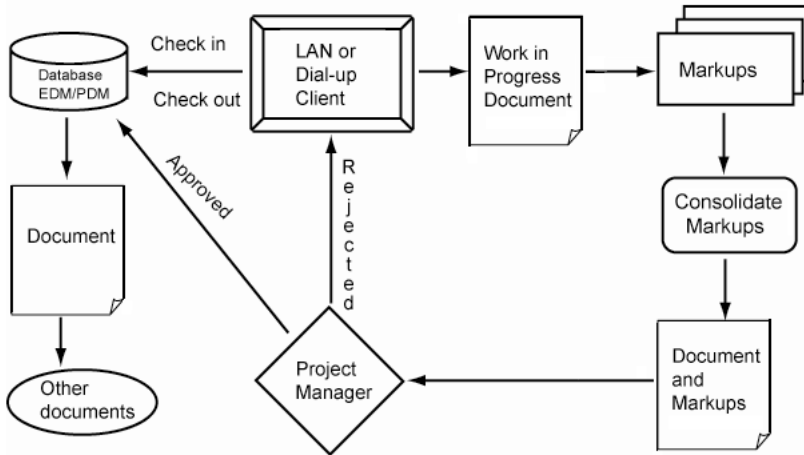
There is a minimum of three types of people that interact with a document:

- **Creator/Author of a document**: The creator is usually the person responsible for creating or modifying a document with an editing application such as Microsoft Word or AutoCAD.
- **Reviewer of document**: This individual usually reviews a document and provides comments to the author or other reviewer. In a paper-based environment, the document is printed on paper and sent to a list of reviewers. Each reviewer provides feedback in several ways, annotates the paper output directly using a pen, attaches sticky notes, and creates one or more annotation documents. The annotated document and any other material is then sent to a supervisor who reviews the material, which is perhaps from several reviewers, and may consolidate the comments into one set. This set is then passed back to the creator to modify the document. Several revisions, or versions of the document may be produced during this process.
- **Users of documents**: Once the review cycle is complete, which possibly involved several versions of the document, the document is published. The final document is made available to those requiring View-only access to it.

At this stage, the document may be provided for viewing either in its native format or as a print rendition.

VueLink provides the capability of marking up a document and storing Markup information as an annotation file in the vault. There are different types of markup entities offered in addition to hyperlinking capabilities.

Markup File Management

More than one Markup file can be attached to a document. In addition, users have the option of displaying one or more Markup files simultaneously.

If the currently displayed document has registered Markups, a red light bulb icon displays in the lower left corner of the status bar, alerting you to the existence of one or more Markup files.

Markup files automatically track the revisions of a document so that each revision has a distinct set of related Markup files. When Markups are valid for a subsequent revision they can be promoted to that particular revision.

Engineering Documents

VueLink is fully equipped to handle complex engineering documents that may consist of external references, layers, and blocks.

Cached Metafiles

With AutoVue, it is possible to enhance the viewing performance of large drawings by using cached metafiles. A metafile is a lightweight format developed by Cimmetry, and represents a true replica of the original format.

Every time you view a file with AutoVue and you close the client window or view another file, AutoVue automatically generates a metafile and checks it into the Livelink repository in the Viewables folder.

When viewing a file, AutoVue checks if a cached metafile exists inside the Livelink repository. If a cached metafile exists, AutoVue checks it out instead of the native file.

VueLink Features

The section covers the features that VueLink adds to AutoVue Client-Server Edition:

- **Viewing documents**
- **Accessing DMS files**
- **Markups**
  - **Creating Markups**
  - **Saving Markups**
  - **Displaying Markups**
  - **Promoting Markups**
  - **Deleting Markups**
  - **Consolidating several Markups into a single Markup**
  - **Saving as master Markups**
- **Converting documents to other formats**
- **Comparing files**
- **File overlays**
- **Crossprobe**
- **Mockup**
- **Batch Printing**
- **Printing document attributes as headers, footers or watermarks**

Viewing Documents

1   Launch your Web browser and start Livelink.
    Example: http://webserver/livelink/livelink.exe
2   Log on to Livelink.

Viewing with Livelink

To view a document, select **AutoVue** from the drop-down **Function** link corresponding to the document.

Note: If your system administrator chooses to update Core Livelink html pages during installation, you can launch AutoVue by clicking on the file link.

AutoVue displays the selected file.
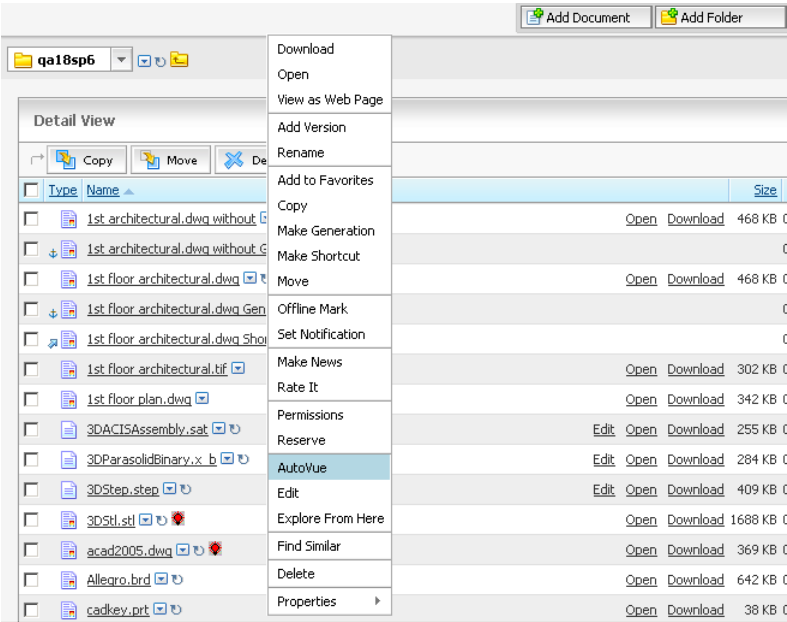
Viewing with Livelink Atlas

To view a document from Livelink Atlas, right-click the document link and select **AutoVue** from the function list. AutoVue displays the selected file.
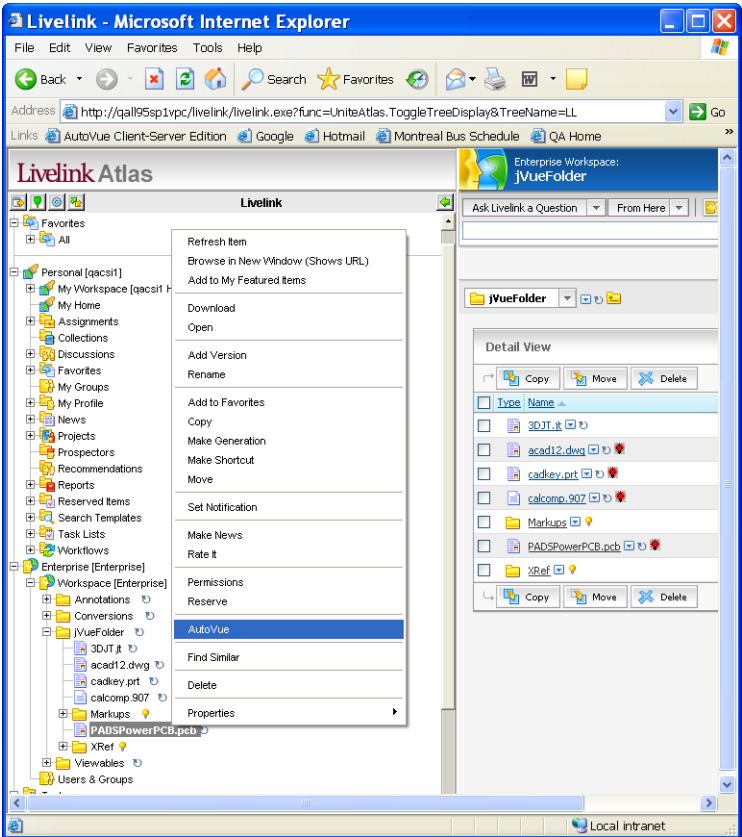
Viewing with Livelink Explorer Pro

To view a document from Livelink Explorer Pro, right-click the document link and select AutoVue from the function list. **AutoVue** displays the selected file.
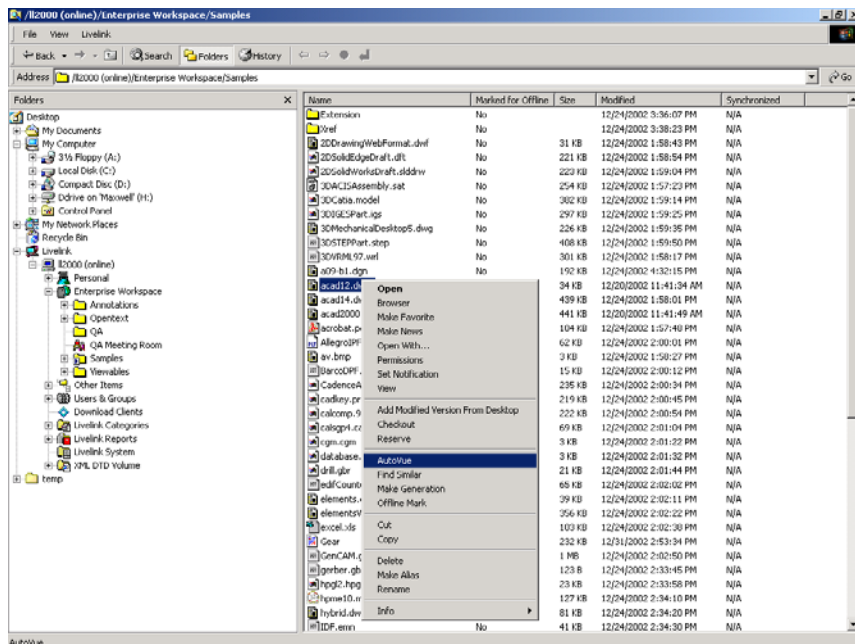
CADManager

VueLink supports AutoCAD/MicroStation External Reference (XRefs) stored by CADManager integration in the Livelink repository. If you are viewing an AutoCAD drawing that has XRefs checked into the Livelink repository, VueLink recognizes these XRefs and checks them out to the AutoVue server for complete viewing of the drawing.

Compound Documents

VueLink supports XRef drawings stored in Compound Documents in the Livelink repository. Recursive compound documents are also supported.

Remote Cache

VueLink supports viewing documents in an environment where Livelink Remote Cache is installed.
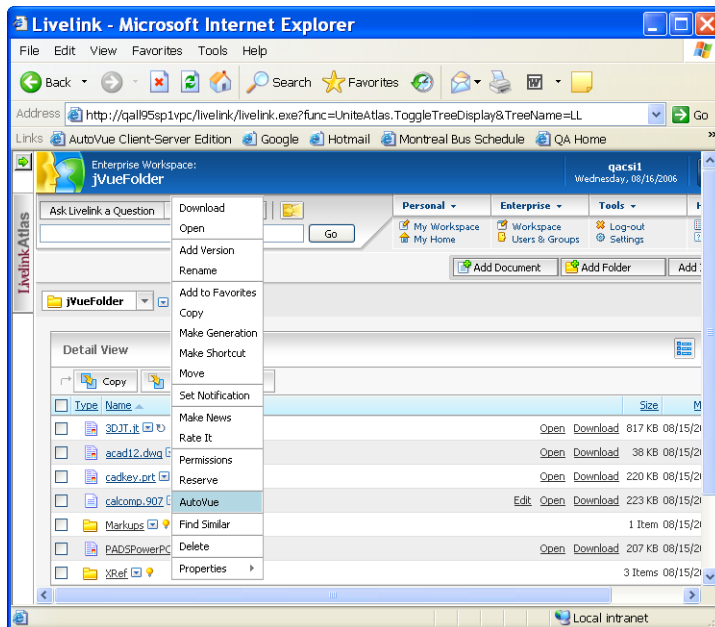
Livelink Servlet

VueLink supports viewing documents in an environment where Livelink is deployed as J2EE Web application.

Directory Services

VueLink supports viewing documents in an environment where Livelink is set up with Directory Services using either NTLM or LDAP Authentication.

AutoVue client displays the selected file.

Note:

*   To launch AutoVue for a file in the livelink workspace, browse to the file in the Livelink workspace and click the file link. Alternatively, select **AutoVue** from the **Functions** menu.

- To view a file from a local disk or network drive, click the File Open icon 📂 to select a file. The selected file displays in AutoVue.

- To open URLs from AutoVue, select **File > Open URL** from the menu. Type the URL you want to display.

- A red light bulb icon 💡 on the left side of the AutoVue status bar indicates that one or more Markup files are associated with the document you are viewing.

- A resource icon 🛈 on the left side of the AutoVue status bar indicates that one of the components required to accurately and fully display the document is missing. Resources consist of fonts, External Reference files (XRefs), and other resources. Click this icon for the details about the missing information.

- If a document has other files associated with it, as is the case with XRefs, AutoVue checks out all the associated files as well.

Accessing DMS Files from Auto-Vue

AutoVue provides two ways to access files that are in the livelink repository from within the AutoVue window: Livelink Browse and Livelink Search. You can use these ways to select files from within the repository when you need to open files for viewing, comparison, cross-probe, Mockup, batch printing or Overlays.
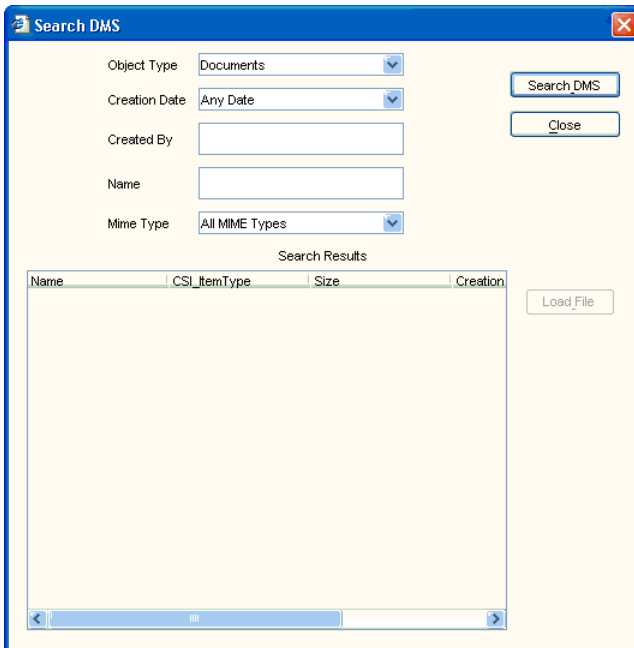
If any operation requires you to open files, the File Open dialog box lets you search or browse the repository.
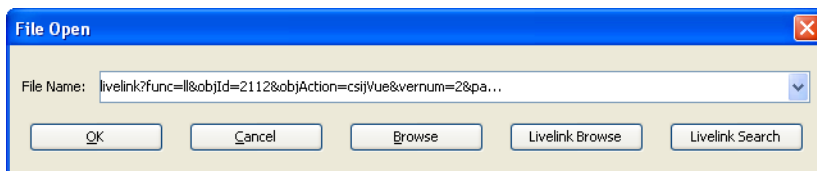
Livelink Search

1   Click the **Livelink Search** button in the File Open dialog box. A dialog box appears that lets you specify a search criteria.

2 Specify the search criteria and click **Search DMS**.

The search results are listed in the **Search Results** section.

3 Select a file from **Search Results** and click **Load File** to open the file in AutoVue.

Livelink Browse

1 Click the **Livelink Search** button in the **File Open** dialog box.

2 In the dialog box that appears, browse through the repository, select a file, and click **OK**. You can also browse for files stored inside Livelink projects.
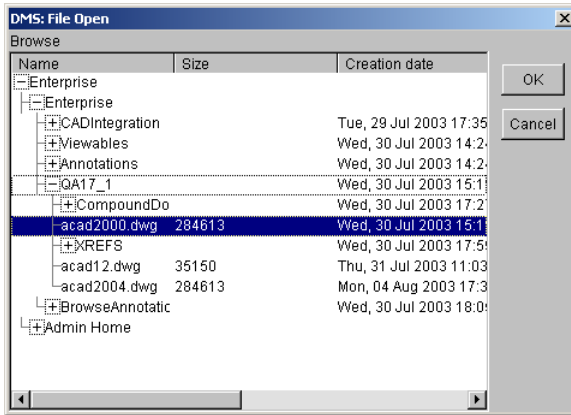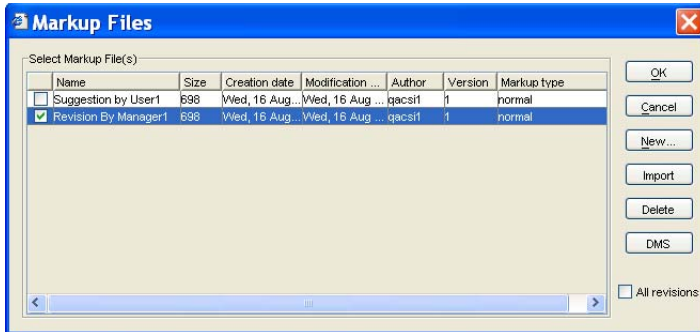

Markups

Creating Markups

1 Display a document in AutoVue.
2 Enter Markup mode by selecting **Markup** from the **File** menu or by right-clicking and selecting **Markup**. The Markup icon ![markup icon] is also available from the Toolbar.
The current active document is displayed in Markup mode ready for you to create Markups.

Note:

• If you have just finished creating a Markup and you want to create a new Markup, select **File > New** from the menu. The New icon **NEW** is also available from the Toolbar.
• If there are existing Markups and you enter Markup mode, you will be prompted with the **Open Markup** dialog box. Click **New** to create a new Markup.
• If you want to select a Markup that is saved in another location within the Livelink repository, click **DMS**. Browse for the Markup and click **OK**.

- VueLink supports saving and retrieving Markups in an environment where Livelink Remote Cache is installed.

Saving Markups

Saving a New Markup File

1 Select **File > Save** from the menu bar.
  The **Save Markup File As** dialog appears.
2 Complete the **Markup Name** field.
3 Select the **Markup Type**. There are three types: **normal** (default), **master**, and **consolidated**.
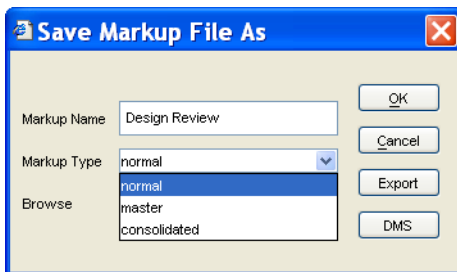
4 Click **OK**.
  The Markup file is saved and remains displayed in the AutoVue viewing window.

Saving Markups in a Different Location within the Livelink Workspace

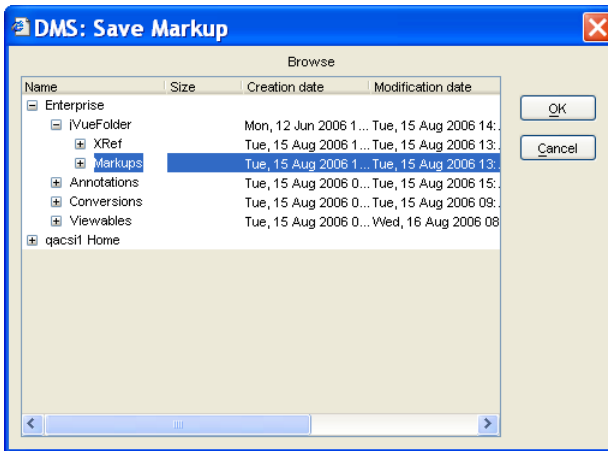1   To save Markups in a different location within the Livelink repository, click the **DMS** button in the **Save Markup File** dialog.
    The **DMS: Save Markup** dialog appears.

2   Select the location where you want Markups to be saved, and click **OK**.

3   Enter the Markup name and click **OK** in the **Save Markup File As** dialog box.

Saving a Newly Created Markup File as a Master Markup

Master Markups are immediately displayed when their base document is displayed. When viewing a document, Master Markups are automatically loaded and displayed in Markup mode. Although non-owners can view Master Markups, they cannot modify the Master Markups or create their own Markups based on them.

1   After you have finished marking up a document, select **File > Save** or **File > Save As** from the menu bar.

The **Save Markup File** dialog appears.
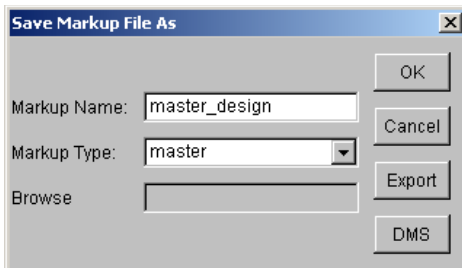
2   Complete the **Markup Name** field.
3   Select **master** for **Markup Type**.
4   Click **OK**.
    The Master Markup file is created and stored in the same library that the
    base document is in. Now when another user logs on and views this file,
    AutoVue Markup mode automatically launches, loads your Master Markups,
    and displays them.

Displaying Existing Markup Files

1   After the selected file displays in AutoVue, enter Markup mode by selecting
    Markup from the **File** menu or right-clicking and selecting **Markup**.
    AutoVue enters Markup mode.
    Note: The Markup icon is also available in the Toolbar.
2   Select **File > Open** from the menu bar.

The **Open Markup** dialog appears.
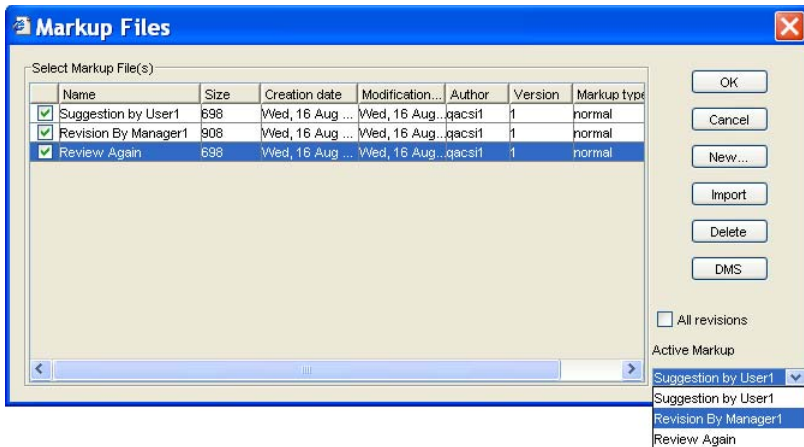
3 Select the Markup file(s) to view, select the active Markup and click **OK**.

4 To open Markups saved elsewhere in the Livelink repository, click **DMS** and browse through the repository. Select the Markup you want to display.

Promoting Markups

It is possible to promote Markups from an earlier version of a document to the current version. When Markups are promoted, they are saved against the new version of the document.

1 After displaying a file with AutoVue, enter Markup mode by selecting **File > Markup** from the menu bar or by right-clicking and selecting **Markup**.
The **Open Markup** dialog box appears.

The Markup icon ![markup icon] is also available from the Toolbar.
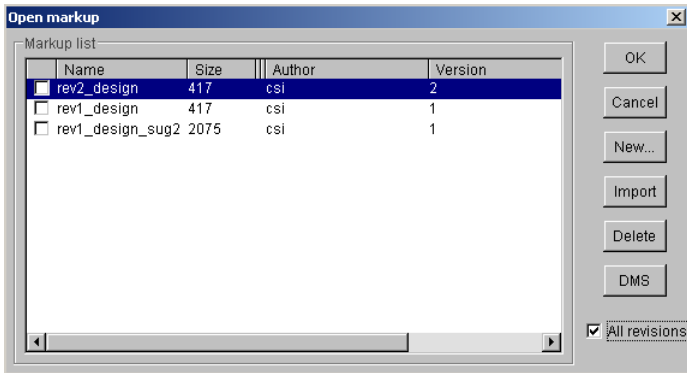
Note: Some columns were narrowed to show the **Version** column.

2 To display the Markup files from previous base file versions, select **All revisions**.

AutoVue lists Markup files for all previous versions of the base file.

3 Select a Markup file from the previous version.

The Markup file is shown with the current version base file. When you save the selected Markup (with or without any modification), it is saved as the Markup of the current base file version.
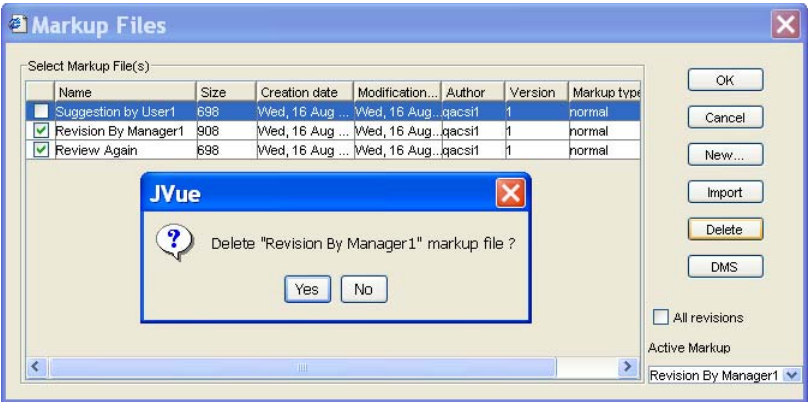
Deleting Markups

1 After displaying a file with AutoVue, enter Markup mode by selecting **File > Markup** from the menu bare or by right-clicking and selecting **Markup**.

The **Open Markup** dialog appears.

Note: The Markup icon ![markup icon] is also available from the Toolbar.

2 Select one or more Markups from the list.

3 Click **Delete**.

A dialog box appears asking you to confirm the deletion of the Markups.

4   Click **Yes**.

The selected Markup(s) are deleted from the list of Markups in the **Open markup** dialog box. The **Open markup** dialog box displays the remaining Markup files.

Consolidating Several Markups into a Single Markup

The **Consolidate** option allows you to create a new Markup that combines copies of selected parts of different Markups. This option is available only if multiple Markups are loaded. During the review cycle, consolidation simplifies document revisions by providing the author with one consolidated Markup rather than several Markup files.
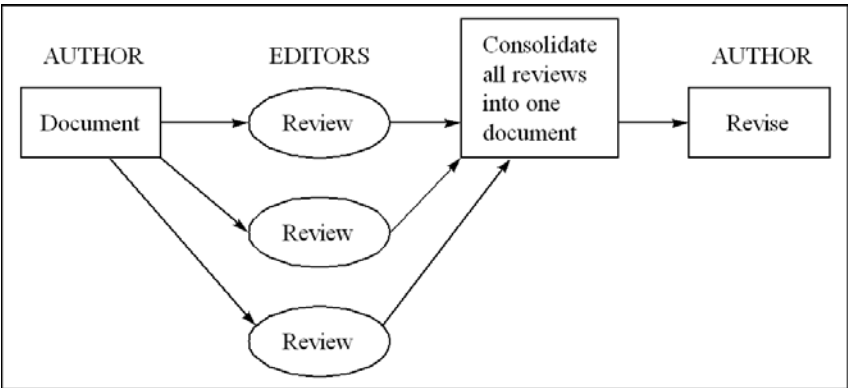
1   Display the two or more Markup files to be consolidated.
2   Select **Consolidate** from the Plug-in **File** menu. The **Consolidated Markups** dialog appears.
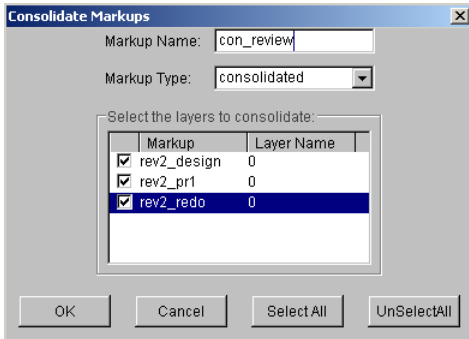
3   Enter a name for the consolidated Markup file.
4   Select one or more layers to be displayed in the consolidated Markup file.
5   For **Markup Type**, select **consolidated**, and click **OK**.

Conversion

With AutoVue, it is possible to convert documents to other formats, such as TIFF, and check the converted file into the Conversions folder in the Livelink repository.

Note: Only the TIFF format is currently supported for saving as a rendition.

1   After displaying a file with AutoVue, select **Convert** from the **File** menu. The **Convert** dialog appears.
    The converted file is checked into the Conversions folder in the Livelink repository.

Printing

With AutoVue it is possible to print document business object attributes in a header, footer, or as a watermark.

1   Select **File > Print** from the AutoVue menu bar.
    The **Print Properties** dialog box appears
2   Customize the **Print Properties**.
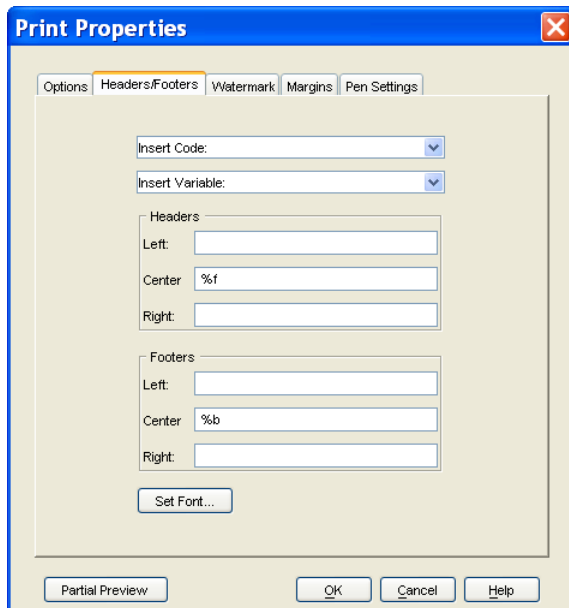
Headers/Footers

This group defines the headers and footers to be included on every page printed of the document.

1   Select the **Headers/Footers** tab.

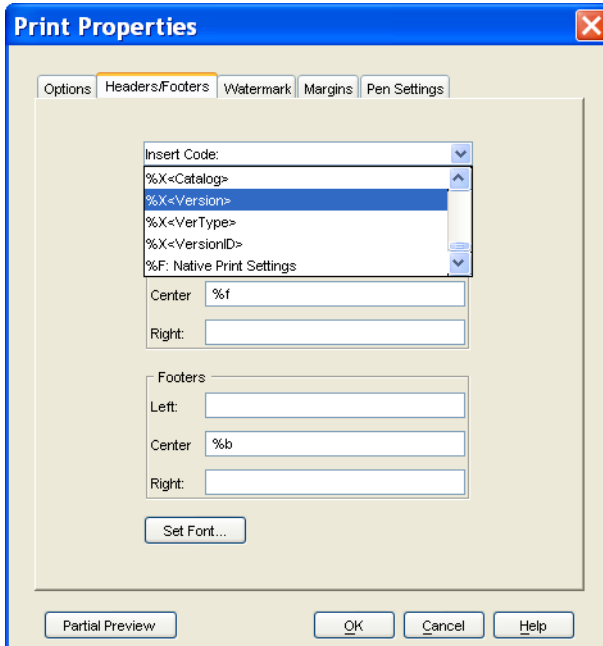2   Enter text manually in the **Header** and **Footer** fields or choose from the
    Insert Code drop-down list to set the information for headers and footers.

3   When you have finished, click **OK**.

Watermarks

A watermark prints faintly and transparent under the current document's
contents. With the **Watermarks** group, the watermark is defined as it will
appear on the printed document.

1   Select the **Watermarks** tab.
2   Enter the text in the **Watermark Text** box. The text displays as it will
    appear on the document.
3   To customize the font, click **Font**.
4   When you are finished, click **OK**.

Batch Printing

VueLink for OpenText and AutoVue provide users with two options for batch
printing. Users can either search in the Livelink workspace and print from the

result list or use the Batch Printing menu option (now available in AutoVue client) to search or browse through the Livelink repository.

# Batch Printing from Livelink Search Results

The VueLink for Open Text configures batch printing of documents selected from the **Search Results** page in Livelink. You can print multiple documents from the **Search Results** page.

1   From Livelink, search for the documents you want to print.
2   Select the check box for the documents you want to print. You can click on top level check boxes to select or deselect all documents.
3   Click **Batch Print**.
     AutoVue prints selected files.

Batch Printing from AutoVue

AutoVue lets you print a set of files in a single batch. You can select files that are in the repository and add them to the list of files to be printed.

1   From the **File > Batch Print** from the menu bar. The **Batch Print** dialog box appears.
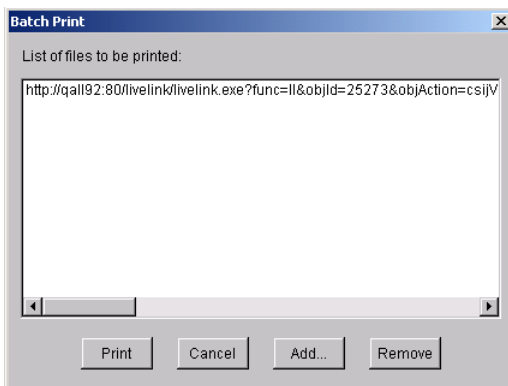
2   Click **Add** to add files to the **List of files to be printed**. The **File Open**
     dialog box appears.
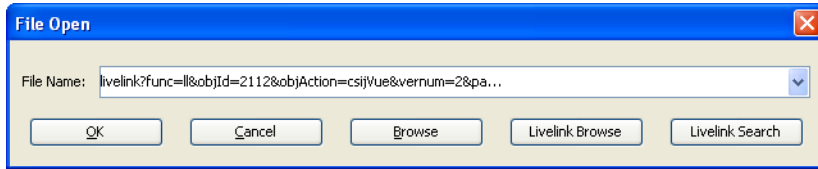
3   To select files from the Livelink repository, click **DMS**. The Livelink
     Browse dialog box appears. Browse through the DMS and select a file.
4   To search through the Livelink repository, click **Livelink Search**. Specify a
     search criteria and select a file from the Search Results.
5   To select a local file, click **Browse**. Browse through the local file system
     and select a file.
6   To specify a URL, type in the URL in the **File Name** field.
7   Click **OK** after you select a file.
8   The selected file(s) appear in the **List of Files to be printed**. To print
     these files, click **Print**.

Note: For help on accessing Livelink, using Livelink Search and Livelink
Browse, refer to section **Accessing DMS and local files**.

Comparing Files

The Compare feature lets you visually compare documents of the same type
(raster or vector). The two selected files display simultaneously in their
respective windows with the comparison findings displayed in a third viewing
window. This feature is very useful for finding similarities and differences in
revisions of a drawing. To compare two versions of a document, open one
version, select **File > Compare** from the menu bar, and select the file to which
you want to compare the one that is open. AutoVue highlights the sections that
have been added, removed, or remain the same.

AutoVue lets you compare a document with any of its previous versions or with
another file that is in the Livelink repository.

1   After displaying a file in AutoVue, select **File > Compare** from the menu
     bar.
     The **Compare** dialog box appears.

2   To compare with a previous version of a document, select a version from the
    Document versions drop-down list.
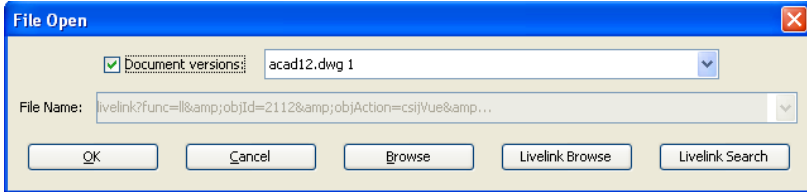
3   To search through the Livelink repository, click **Livelink Search**. Specify a
    search criteria and select a file from the Search results.
4   To browse through Livelink and select a file, click **DMS**. The Livelink
    Browse dialog box appears. Browse through the DMS and select a file.
5   To select a local file, click **Browse**. Browse through the local file system
    and select a file.
6   To specify a URL, type in the URL in the **File Name** field.
7   Click **OK** after you select a file.
    AutoVue displays three windows: the first contains the original document,
    the second contains the version to compare against, and the third window
    contains the comparison result. Additions appear in green, deletions in red
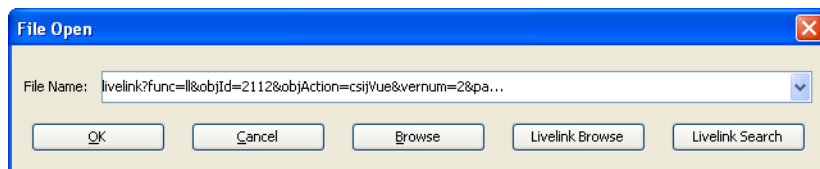   and unchanged parts in blue.
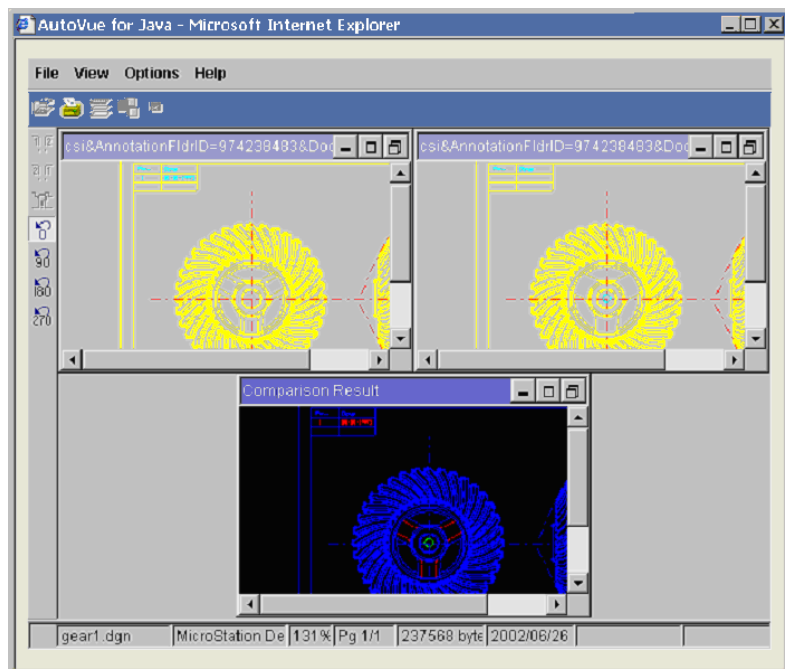
Note: For help on accessing the Livelink repository using Livelink Search and Livelink Browse, refer to section **Accessing DMS and local files**.

File Overlays

AutoVue lets you specify a file saved in the Livelink repository for an overlay.

1 Select **File > Overlays** from the menu bar. The **File Open** dialog box appears.

2 To select a file from the Livelink repository, click **DMS**. The Livelink Browse dialog appears. Browse through the DMS and select a file.

3   To search through the Livelink repository, click **Livelink Search**. Specify a search criteria and select a file from the Search Results.
4   To select a local file, click **Browse**. Browse through the local file system and select a file.
5   To specify a URL, type in the URL in the **File Name** field.
6   Click **OK** after you select a file.
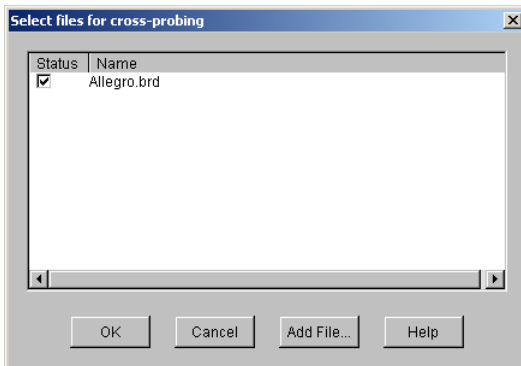
Note: For help on accessing Livelink, using Livelink Search and Livelink Browse, refer to section **Accessing DMS and local files**.

Cross Probing

AutoVue lets you cross probe EDA drawings. Cross probing is the ability to select elements in the schematic and have them mapped to the corresponding components in the layout drawings and vice versa. You can also cross probe between the 2D View and the 3D View of the same document.

AutoVue lets you specify files saved in the Livelink repository for cross probing.

1   Select **File > Crossprobe** from the menu bar. The **Select Files for Cross-Probing** dialog box appears.

2   To add files, click **Add File**.The **File Open** dialog box appears.
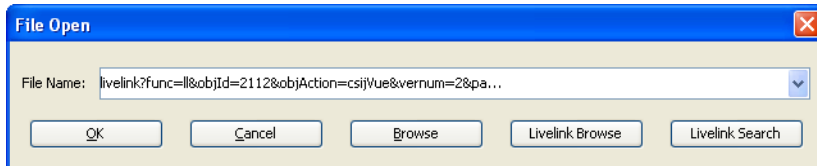
3   To select a file from the Livelink repository, click **DMS**. The Livelink Browse dialog box appears. Browse through the DMS and select a file.

4   To search through the Livelink repository, click **Livelink Search**. Specify a
     search criteria and select a file from the Search Results.
5   To select a local file, click **Browse**. Browse through the local file system
     and select a file.
6   To specify a URL, type in the URL in the **File Name** field.
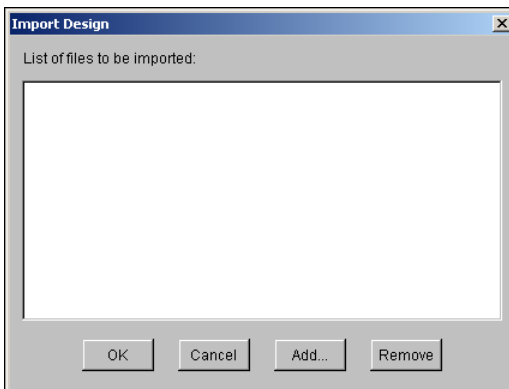7   Click **OK** after you select a file.

Note: For help on accessing Livelink, using Livelink Search and Livelink
Browse, refer to section **Accessing DMS and local files**.

MockUp

AutoVue provides Digital MockUp capability. Mockup is the ability to import
and combine any number of native CAD files, regardless of file format, to create
a virtual assembly. These file formats include: CATIA, Pro/E, UG, SolidWorks,
Inventor, JT, Solid Edge, and so on.

With AutoVue, it is possible to import 3D files that are within the Livelink
repository or to browse the local file system to select a file for import.

1   View a 3D document from Livelink.
2   Select **File > Mockup** from the menu bar. The **Import Design** dialog
     appears in AutoVue.

3   To add files, click **Add**.The **File Open** dialog box appears.
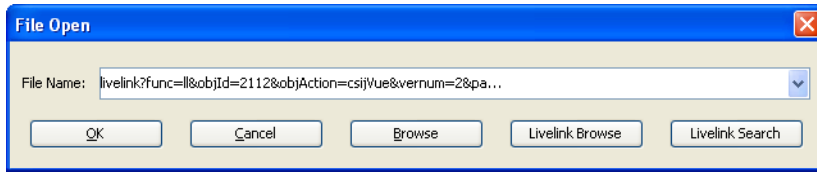
4   To select a file from the Livelink repository, click **DMS**. The Livelink
      Browse dialog appears. Browse through the DMS and select a file.
5   To search through the Livelink repository, click **Livelink Search**. Specify a
      search criteria and select a file from the Search Results.
6   To select a local file, click **Browse**. Browse through the local file system
      and select a file.
7   To specify a URL, type in the URL in the **File Name** field.
8   Click **OK** after you select a file.

Note: For help on accessing Livelink, using Livelink Search and Livelink
Browse, refer to section **Accessing DMS and local files**.

Feedback

Cimmetry Systems products are designed according to your needs. We would appreciate you feedback, comments or suggestions. Contact us by fax, e-mail or telephone. We added a feedback button to our Web page that activates an easy-to-use feedback form. Let us know what you think!

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