Oracle VueLink 19.3 for Oracle UCM

User's Manual

An Integration between Oracle Universal Content Management and AutoVue Web Version

ORACLE

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Introduction

Oracle VueLink for Oracle UCM provides an interface between the Oracle Universal Content Management (UCM) server and AutoVue Web Version. This interface enables you to add powerful viewing and markup capabilities to your UCM via a Web browser in an intranet or the Internet.

VueLink and AutoVue provide you with the following functionality:

- Document viewing of native formats.
- Graphically marking up documents using a rich set of graphical and textual tools.
- Reviewing your markups and the markups of your coworkers.
- Create a Mobile Pack for a file that can include all the resources and associated markups.
- Full security linking to the Docbase access control list (ACL).

Note:

- Throughout this manual the family of AutoVue Products is referred to as AutoVue. The AutoVue family of products includes AutoVue Office, AutoVue 2D Professional, AutoVue 3D Professional Advanced, AutoVue EDA Professional, and AutoVue Electro-Mechanical Professional.
- Refer to the *AutoVue Supported File Formats* document for further information about the specific features and file formats supported by each AutoVue product.

Functional Overview

Oracle VueLink for Oracle UCM adds document viewing and markup capabilities to the UCM server. Through the use of a web browser in an intranet/internet environment, Oracle VueLink for Oracle UCM provides a seamless interface between the UCM server and the AutoVue server.

Markups/annotations/redlines are automatically saved in the library defined in UCM during the VueLink installation and are available for others users to edit or view depending on their access level to that library. This means users can save markups for documents for which they have read-only access if the permission is granted for the markup library.

Oracle VueLink for Oracle UCM and AutoVue provide users with the following powerful features and capabilities, locally or remotely via a web browser:

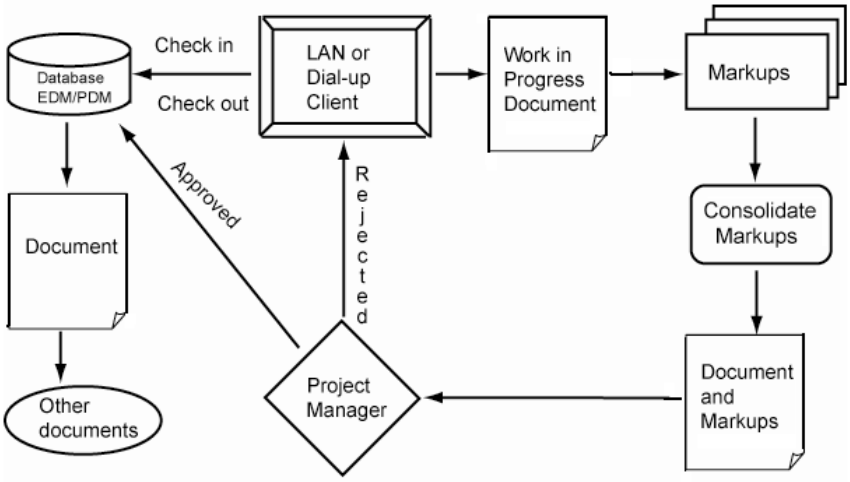
- Securely view documents in their native format without editing them.
- View hundreds of 2D, EDA, 3D Engineering, and Business document formats.
- Simultaneously work with multiple markup layers and files.
- Create a Mobile Pack for a file that can include all the resources and associated markups.
- Create markups/annotations/redlines 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.
- Associated markups with a specific document revision. Markups may be migrated to new revisions as required.
- Graphically compare different revisions of engineering drawings or 3D Assemblies.
- Print documents with headers, footers, and watermark information queried from specified document attributes.

Oracle VueLink for Oracle UCM also provides you with a basis to which other powerful functions can be added via custom designed tools to further enhance your UCM installation. Custom designed tools offer many possibilities. For example, you can create an “intelligent” custom stamp, such as an Engineering stamp, that queries for information that can be included as markups.

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 our designing a tool to meet your specific needs.

Why does the UCM 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 figure shows an example of a possible workflow cycle.



As a minimum, there are three types of people who interact with a document:

- **Creator or 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 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, along with other material, is then sent to a supervisor who reviews the material—possibly 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 version of the document may be produced during this process.
- **Users of document:** Once the review cycle is complete, possibly involving several version of the document, the document is published. The final document is made available to those requiring view-only access to the document. 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 UCM library. There are different types of markup entities offered in addition to hyperlink capabilities.

Markup File Management

More than one Markup file can be attached to a document. In addition. users have the options of displaying multiple

Markup files simultaneously. If the document currently displayed has registered markups, a **Markup Indicator** displays in the lower left corner of the status bar, alerting the user to the existence of one or more Markup files. Markup files also 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.

Other Useful Features

Compare

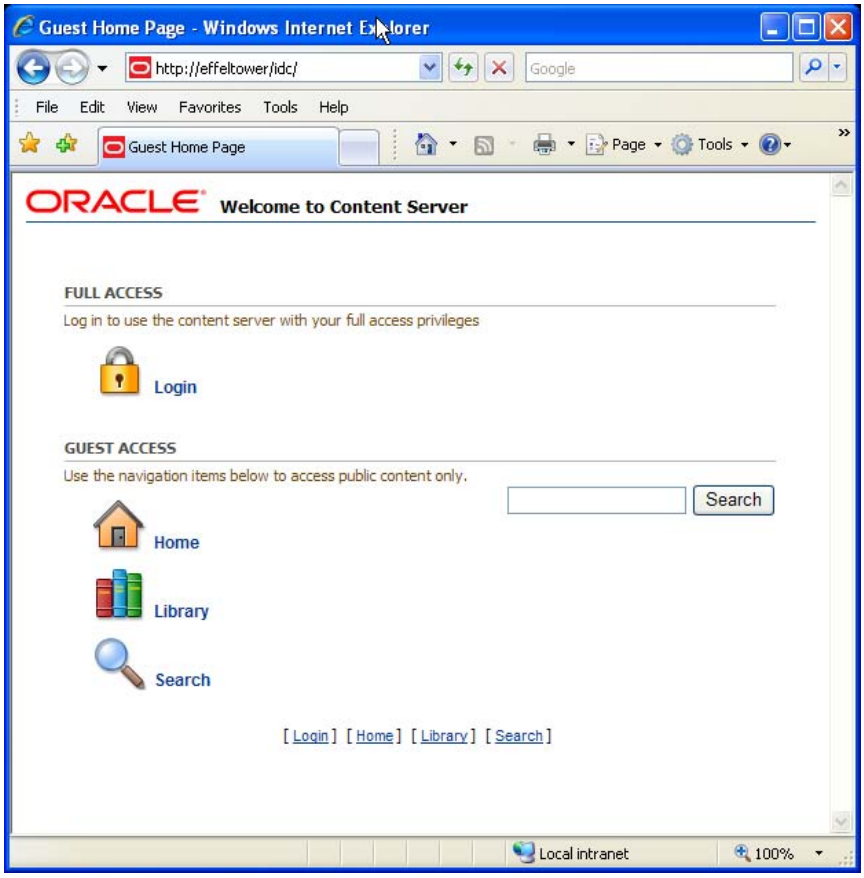
The Compare feature is a very useful for finding similarities and differences in different version of a drawing. With this feature, documents of the same type—raster, vector, or 3D—are visually compared. The two selected files display simultaneously in their own windows while the comparison findings display in a third viewing window.

Engineering Documents

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

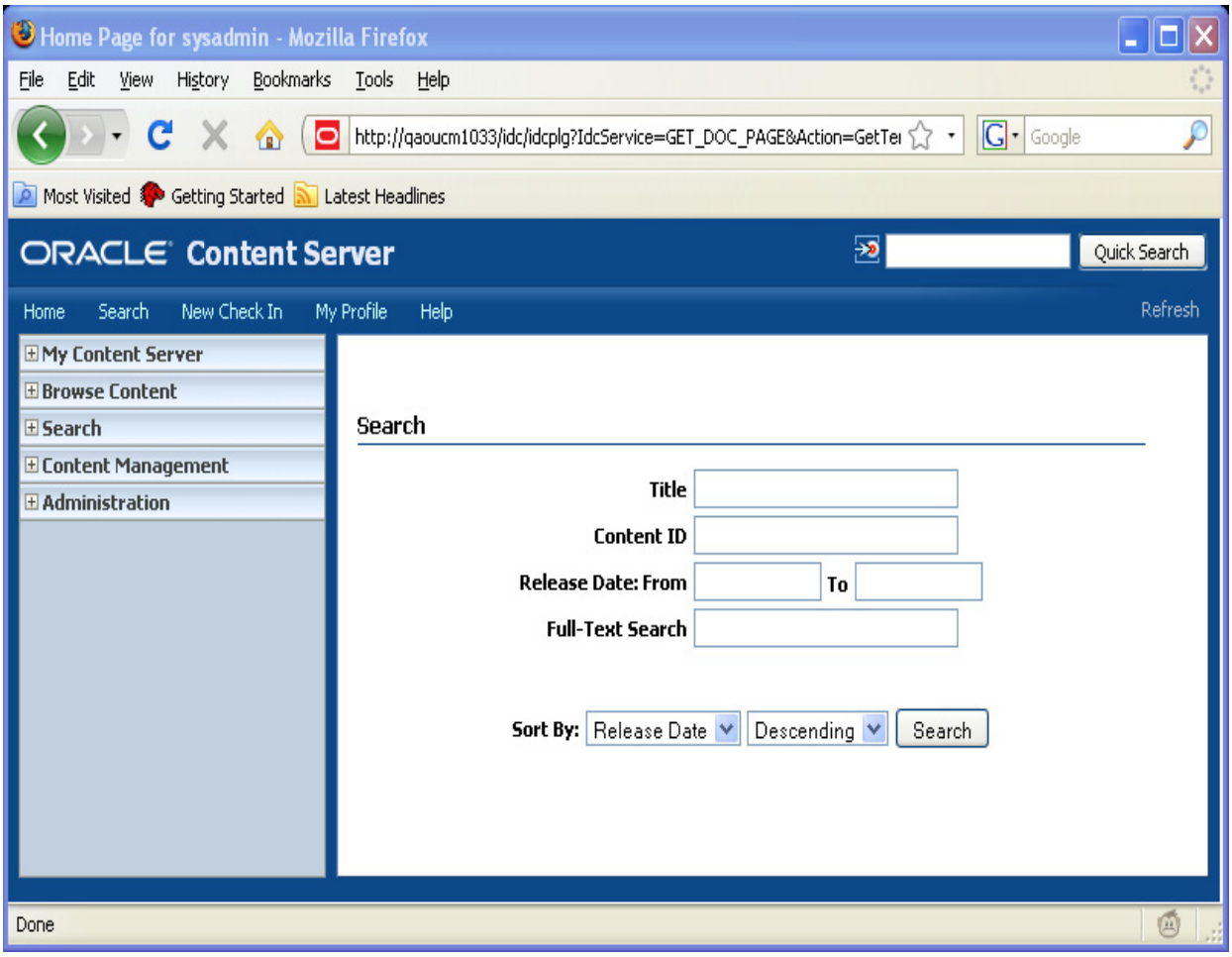
Viewing Documents

1 Run your web browser, and then go the UCM home page.
For example: `http://myserver/idc`



2 Click **Login.** If prompted, enter your username and password.

The Search page appears.



3 Enter the Title, Content ID, Release Date or Full-Text Search of the document in their respective fields, and then click **Search.**

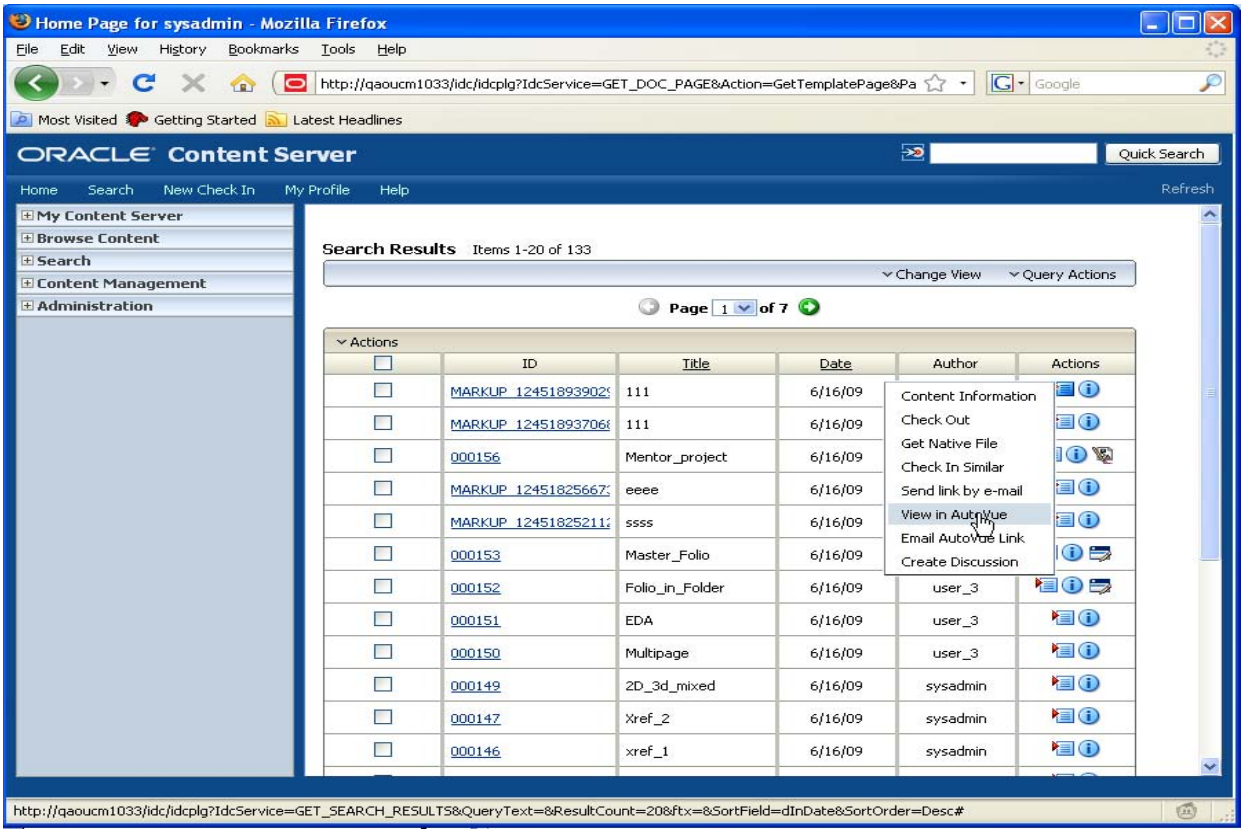
Note: To view the complete library, leave all the fields empty and click **Search.**

The Search Results page appears.

The following sections provide alternate ways in which to view a document.

Viewing from the Search Results Page

To the right of the document you want to view, under the Actions column, click **Actions** . From the menu that appears, select **View in AutoVue.**



An AutoVue applet is launched, and the selected document displays in the AutoVue client.

Note: It is important to note the following:

- The Markup Indicator on the left side of the AutoVue status bar indicates that one or more Markup files are associated with the current document.
- A Resource button 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 button for 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 fields as well.
- XRefs are supported through the use of Folios. Refer to the **Appendix** to learn how to associate XRefs with master files based on the CAD Folio template.
- To view a file from a local disk or network drive, click **File Open** .

Viewing Markups with the Markup Icon

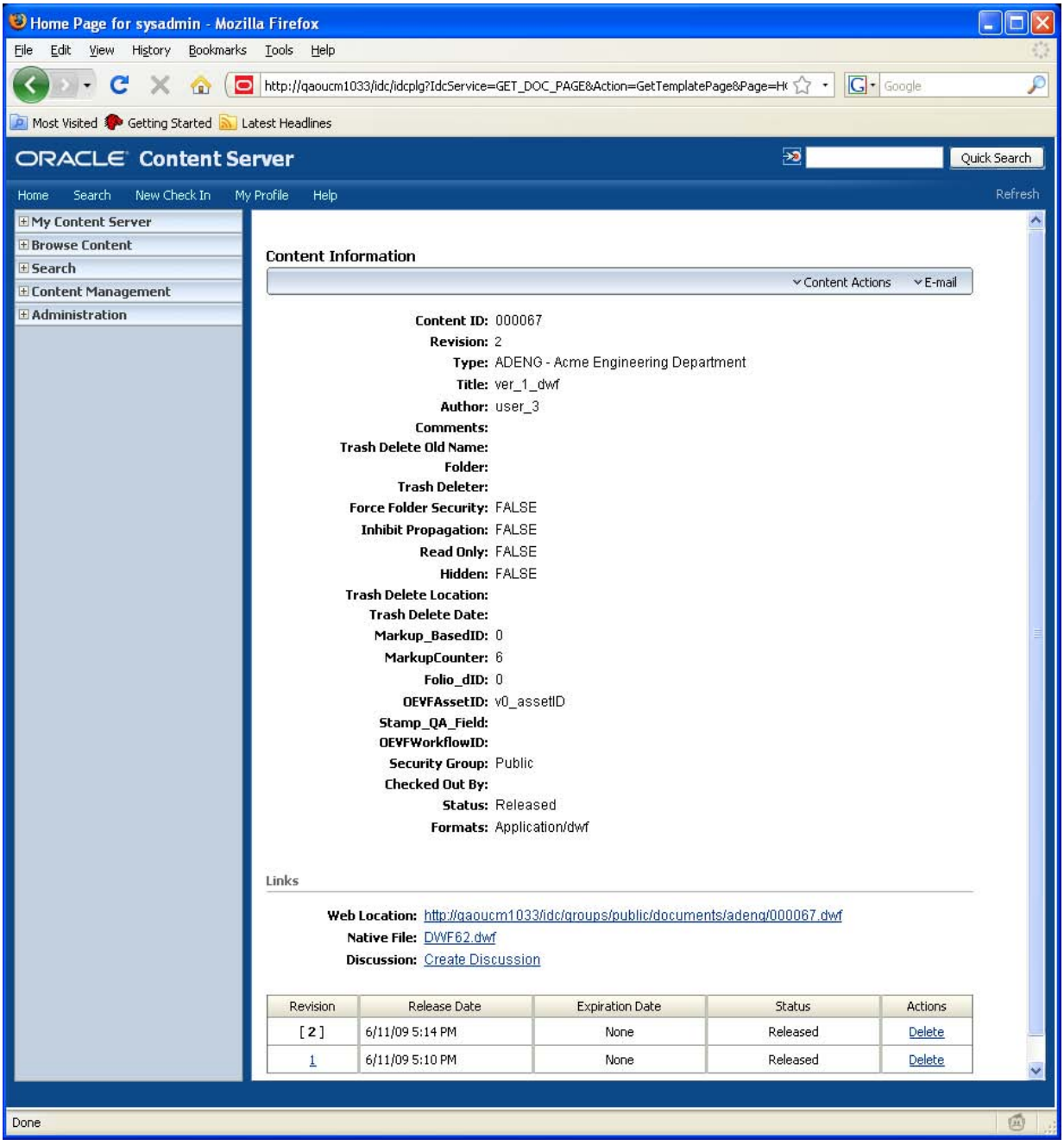
If a file has associated markups, a **Markup** icon appears to the right of the **Info** . icon.

To view how many markups are in the file, you can hover the mouse cursor over the markup icon to view tooltips.

When you click on the Markup icon, all markups that belong to the file display in the Search Results page.

Viewing from the Content Information Page

1 To the right of the document you want to view, under the Actions column, click **Info** .
The Content Information page appears.



2 From the **Content Actions** menu, select **View in AutoVue.**

Viewing a Revision

To view a specific revision of a document, do the following:

1 Scroll to the bottom of the Content Information page, and under the Revision column, click the link to go to that particular revision content information page.

The Content Information page loads the specified revision.

2 To view the document, from the **Content Actions** menu, select **View in AutoVue.**

Emailing AutoVue Link

You can email the AutoVue link from either the Search Results or Content Information page by selecting the **Email AutoVue Link** option.

Note: When a user clicks on the link, if there is not an active UCM session on the machine, the login page appears. After the user enters the login information and clicks on the link again, the file displays in the AutoVue client.

Email AutoVue Link in Search Results Page

To the right of the document you want to view, under the Actions column, click **Actions** . From the menu that appears, select **Email AutoVue Link**.

The default mail client opens with a link to the document in the body of the message and the name of the document in the email subject.

Email AutoVue Link in Content Information Page

To the right of the document you want to view, under the Actions column, click **Info** . The Content Information page appears.

From the **Content Actions** menu, select **Email AutoVue Link**.

Accessing Files Stored in the Backend UCM System from AutoVue

UCM Search allows you to access files that are in the backend UCM system from within the AutoVue window. Using UCM Search from within the repository, you can open files for viewing, comparison, cross-probing, mockup, bath printing, overlays and hyperlink markups. When opening an file, the File Open dialog appears to enable you to search the repository.

Note:

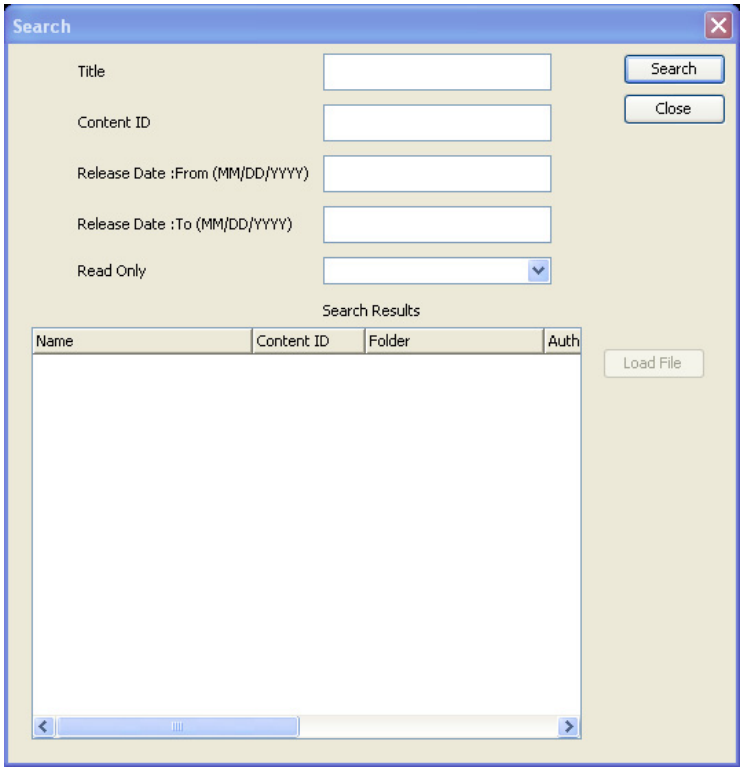
- To open files that are on the local file system, from the AutoVue client, click the **File** menu and then select **Open Local File**.
- To open URLs from the Autovue client, click the **File** menu, select **Open URL**, and then enter the desired URL to display.

UCM Search

To access files using UCM search, perform the following:

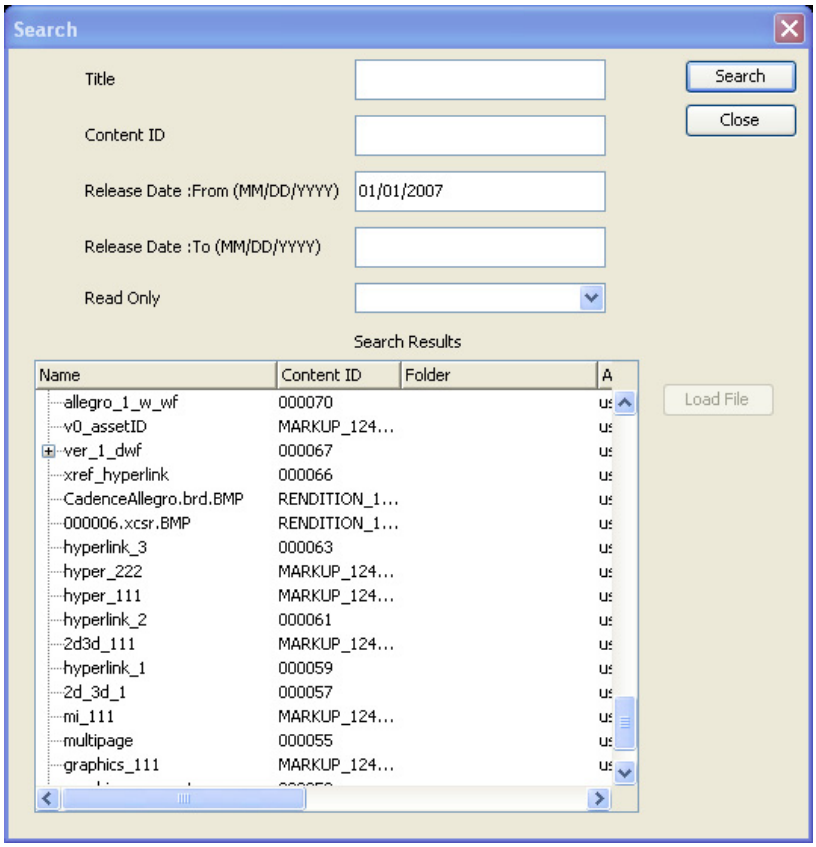
1 From the **File** menu, select **Open URL**.
The File Open dialog appears.

1 Click **UCM Search.**
The Search dialog appears.



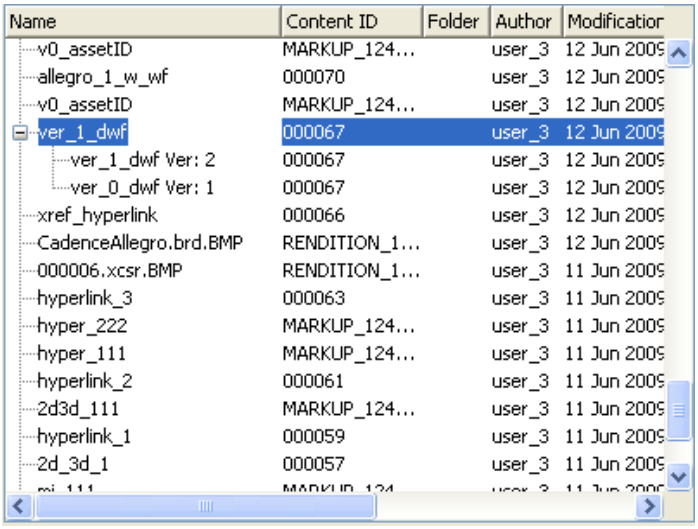
2 To search for a file in the UCM, enter the **Content ID**, **Release From Date**, **Release To Date**, and/or other search attributes of the file in the UCM Search dialog.

3 Click **Search**.
AutoVue looks for all documents in the repository that matches the search criteria and populates the Search results section.



4 From the Search Results section, select a file and then click **Load File** to display the file in AutoVue.

Note: If a file has multiple versions, it appears as a root node in Search Results with the file revisions as child nodes. Expand the file to view the revisions and corresponding information (for example, Author and Modification Date).

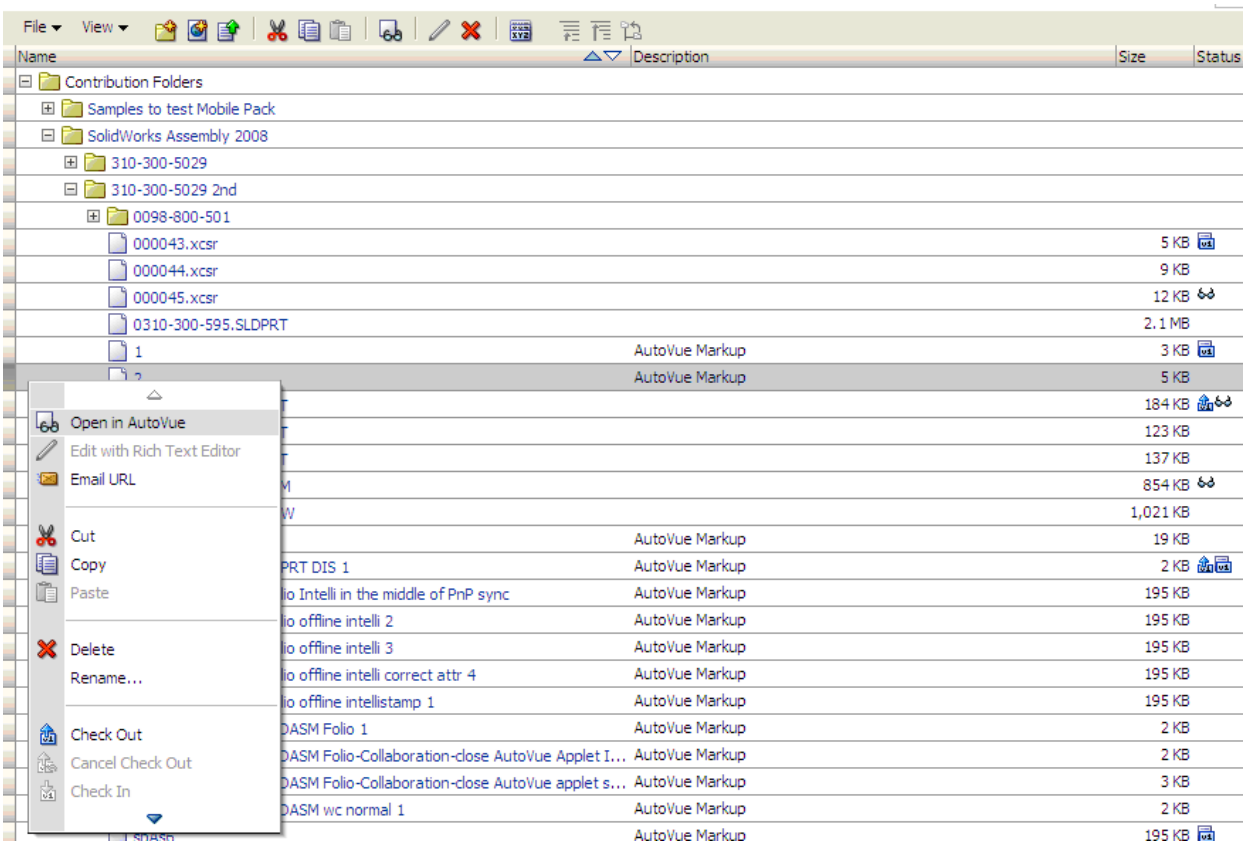


Viewing Documents from Oracle Web Center Suite

If you have an integration for Oracle Web Center Suite (OWCS) and Oracle VueLink for Oracle UCM, you can view documents from the OWCS user interface.

Go to the OWCS home page and enter your login information. For example: http://hostname:port/webcenter

From the OWCS user interface, right-click a file (any file except am AutoVue Markup File) and select **Open in AutoVue**.

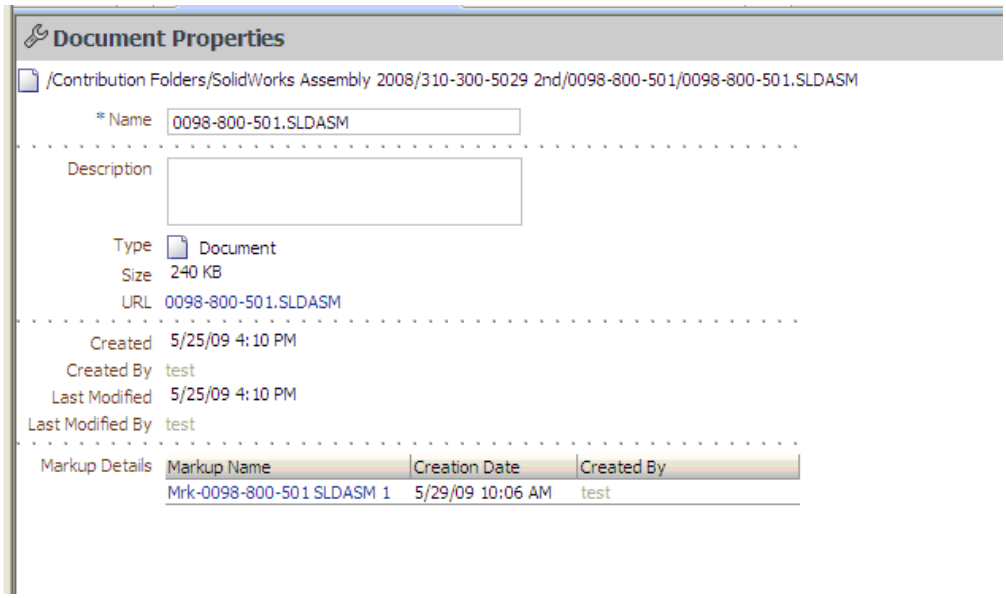


Note: You can also select the file and from the toolbar click **Open in AutoVue** .

Loading Documents with Markups

OWCS also allows you to load a base file along with the associated Markup file.

1 Select a file with markups and from **File** menu select **Properties**.
The Document Properties page appears.



2 From the Markup Name column, click on the markup link to load the base file and associated markup in AutoVue.

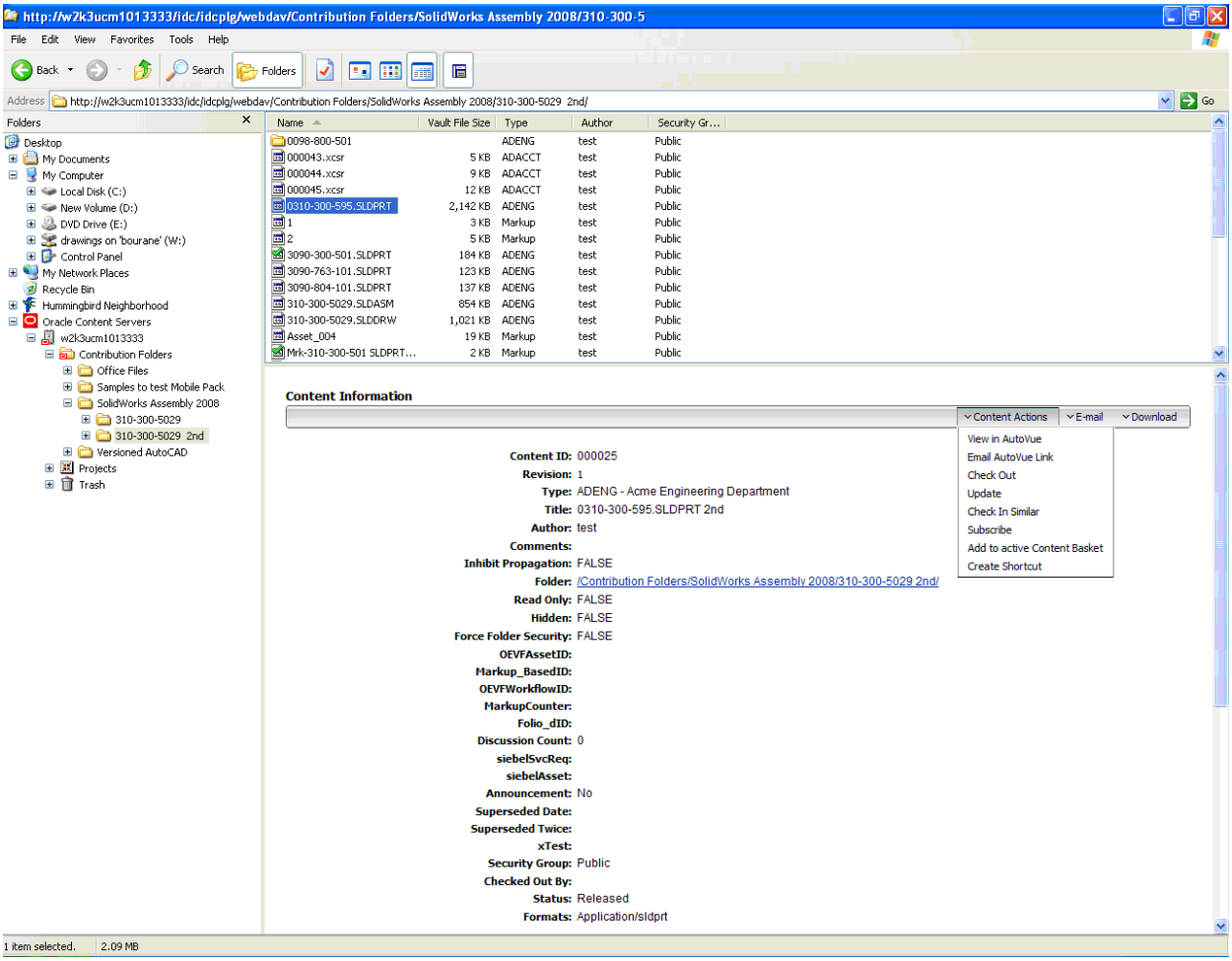
The OWCS user interface displays a OWCS Markup Indicator Icon for documents that have an associated Markup file.When a cursor hovers over the OWCS Markup Indicator, a tooltip appears listing the number of Markup files the document has.

Note: If a UCM session is not active on the machine, you are directed to the login page. After providing the login information, the file can be open the AutoVue client.

Viewing Documents for Oracle UCM Desktop Integration Suite

Oracle VueLink for Oracle UCM supports viewing from Oracle UCM Desktop Integration Suite (DIS). To do so, perform the following:

1 Open Windows Explorer or Microsoft Outlook (if you have Microsoft Office installed) and browse to the **Oracle Content Servers** directory.



2 From the **Oracle Content Servers** directory, select one backend UCM system to connect to and enter login information and password.
The folders contained within the repository appear.

3 Browse the folders to select the file you want to view.
The Content Information page appears in the lower part of the window.

4 From the **Content Actions** menu, select **View in AutoVue**.
The file opens in the AutoVue client.

Note: The Content Actions menu also allows you to select **Email AutoVue Link**. Refer to **Emailing AutoVue Link** for more information.

Managing Markup Files

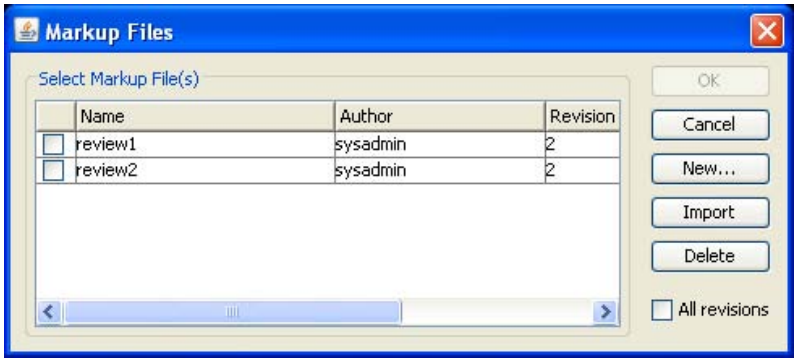
Creating Markups

1 Open a document in AutoVue.
2 From the **Markup** menu, select **New** to enter Markup mode.

Note: From the toolbar, you can also click **New Markup** .
The current active document displays in Markup mode ready for you to create markups.
If you have just finished creating a Markup file and you would like to create a new Markup file, from the **File** menu, select **New.**

Note: From the toolbar, you can also click **New Markup** .

3 If there are exiting markups, from the status bar, click the **Markup Indicator** button . The Markup Files dialog appears.

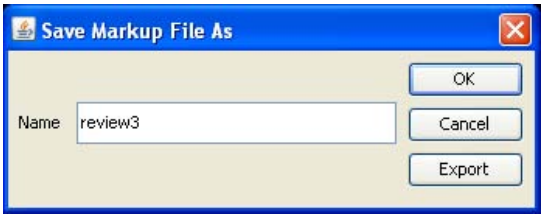


4 Click **New.**

Saving Markups

Saving a new Markup file

1 From the **Markup** menu, select **Save.**
The Save Markup File As dialog appears.



2 In the **Name** field, enter a name for the Markup file.
3 Click **OK.**
The Markup file is saved and remains in the AutoVue viewing window.

Saving an existing Markup file

From the **Markup** menu, select **Save.**

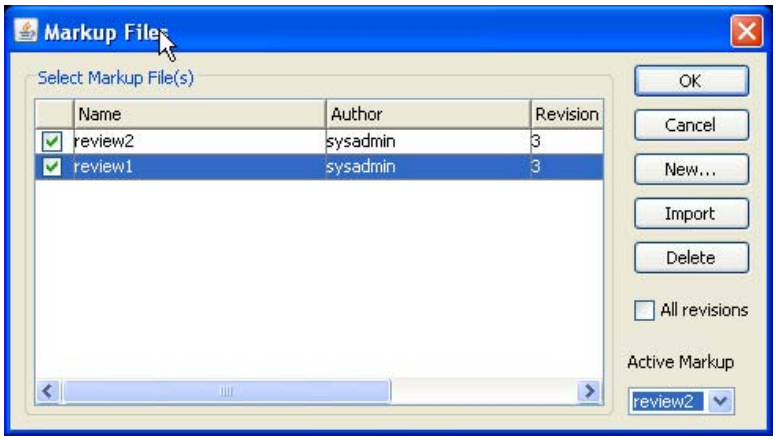
The Markup file is saved and remains in the AutoVue viewing window.

Displaying Existing Markups

To view markups after opening a document in AutoVue, do the following:

1 From the **Markup** menu, select **Open**.

Note: From the toolbar, you can also click **Open Markup** .
The Markup Files dialog appears.



2 To view a Markup file or files, select their respective check boxes.
3 If multiple Markup files are selected, select the active Markup file from the Active Markup list.
4 Click **OK.**

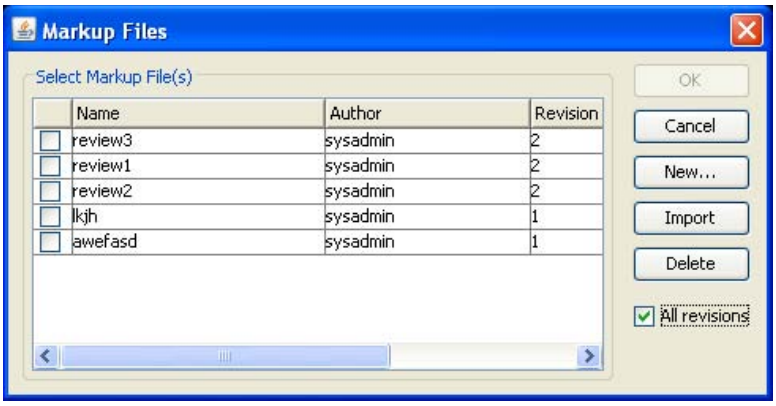
Promoting Markups

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.

After opening a document in AutoVue, do the following:

1 From the **Markup** menu, select **Open**.
The Markup Files dialog appears.

Note: From the toolbar, you can also click **Open Markup** .



2 Select the **All Revisions** check box. The Markup files from previous versions of the base files appear in the list.
3 Select the check box to the left of one Markup file from the previous version.
The Markup file is shown with the current version base file.
4 When you save the selected markup (with or without any modifications), it is saved as the markup of the current base file version.

Deleting Markups

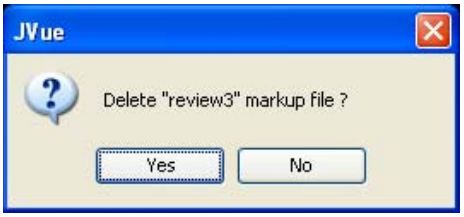
After opening a document in Autovue, do the following:

1 From the **Markup** menu, select **Open**.
The Markup Files dialog appears.

Note: From the toolbar, you can also click **Open Markup** .

2 Select one or markups from the list.

3 Click **Delete.**
A message prompt appears as shown to let you confirm the deletion of the desired Markup file or files.

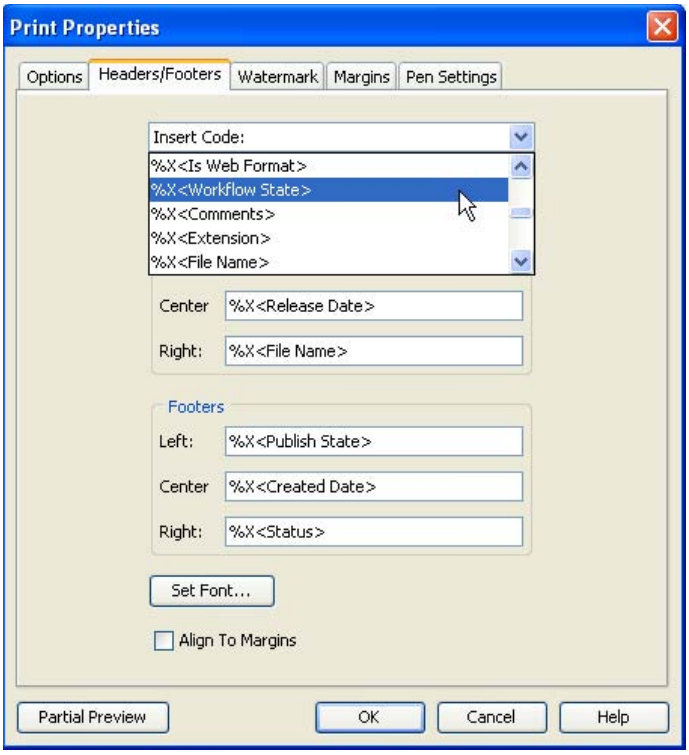


4 Click **Yes.** The selected Markup file or files are deleted from the list of markups. The Markup Files dialog box displays the remaining Markup files.

Printing Headers, Footers, and Watermarks

With AutoVue and Oracle VueLink for Oracle UCM, it is possible to print document attributes in a header, a footer, or as a watermark.

1 From the **File** menu, select **Print.**
The Print Properties dialog box appears.
2 Customize the print properties as shown in the following figure:



Headers/Footers Group

The Headers/Footers group defines the headers and footers to be included on every printed page of the document.

1 Select the **Headers/Footers** tab.
2 To set the header and footer content, enter text in the **Header** and **Footer** fields or select text from the **Insert Code** and **Insert Variables** lists.
3 Click **Font** to customize the font.
4 Click **OK** when finished.

Watermarks Group

A watermark prints faintly on 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 Click **Font** to customize the font.
4 Click **OK** when finished.

Converting Documents to Other Formats

You can use AutoVue to convert documents to other formats (for example, TIFF) and then check-in the converted document back into the UCM repository as a separate file.

Note: TIFF, PDF, and BMP are the currently supported formats for saving to the backend UCM system.

1 Open a document in AutoVue.

2 From the **File** menu, select **Convert**.
The Convert dialog appears.

3 From the **Convert to Format** list, select the **TIFF** format.

4 Select the **Rendition** option.

5 Modify any other options as required.

Click **OK**.
File conversion begins. AutoVue converts the file to the TIFF format and checks it into the UCM repository as a separate file.

File Compare

With the Compare feature, you can visually compare documents of the same type—raster, vector, or 3D. The two selected files display simultaneously in their own windows while the comparison findings display in a third window. This feature is very useful for finding similarities and differences in revisions of a drawing.

With AutoVue, you can compare any two versions of a document.

After opening a document in AutoVue, do the following:

1 From the **Analysis** menu, select **Compare.**
The File Open dialog appears.

2 Select a version from the Document Versions list.

Note: To select a file through **UCM Search** or **Browse**, rather than select a version from the Document Version list, deselect the Document Versions check box.

3 To search through the backend UCM system, click **UCM Search**, specify the search criteria, and then 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.
Note: To specify a URL, enter the URL in the **File Name** field.

5 Click **OK** after you select a file.
In comparison mode, AutoVue displays the files in three windows: the first window contains the original document, the second window contains the version to compare against, and the third window displays the comparison result.
The comparison result window uses a color scheme to communicate the result of the file comparison:

Color	Description
Green	An addition to the document.
Red	A deletion from the document.
Blue	No changes.

Cross Probing

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

1 Display a document with AutoVue.

2 From the **Analysis** menu, select **Cross Probe**.
The Select Files for Cross Probing dialog appears.

3 Click **Browse** to select a file from the local file system.

4 Click **UCM Search** to select a file from the backend UCM system.

Note: To specify a URL, enter the URL in the **File Name** field.

5 Click **OK**.

For more information on accessing the backend UCM system using UCM Search, refer to **Accessing Files Stored in the Backend UCM System from AutoVue**.

Mockup

With AutoVue, you can import 3D files from the backend UCM system into the current AutoVue window.

1 View a 3D document with AutoVue.

2 From the **File** menu, select **Import File For Mockup**.
The Import Design dialog appears.

3 To add files, click **Add**.
The File Open dialog appears.

4 To search through the backend UCM system, click **UCM Search**, specify the search criteria, and then select a file from the search results.

5 Click **Browse** to select a file from the local file system.

Note: To specify a URL, enter the URL in the **File Name** field.

6 Click **OK**.

Batch Print

With AutoVue, you can print a set of files in a single batch. You can also select files that are in the backend UCM system to add to the list of files to be printed.

1 From the File menu, select Batch Print.
The Batch Print dialog appears.

2 Click Add to add files to the list of files to be printed.
The File Open dialog appears.

3 To search through the backend UCM system, click **UCM Search**, specify the search criteria, and then select a file from the search results.

4 Click **Browse** to select a file from the local file system.

Note: To specify a URL, enter the URL in the **File Name** field.

5 Click **OK**.
The selected files appear in the list of files to be printed.

6 To print these files, click **Print**.

File Overlays

AutoVue allows you to specify a file saved in the backend UCM system for an overlay.

1 Open the file you want to use as the base file for the overlay.

2 From the **File** menu, select **Import File as Overlay**.
The Overlay dialog appears.

3 Click **Add**.
The Please Select an Overlay dialog appears.

4 Select a file to overlay and then click **Open**.

5 To add another file to overlay, repeat steps 3 through 4.

6 When done, click **OK**.
The base file displays with the selected overlays.

For more information on accessing the UCM repository using UCM Search, refer to **Accessing Files Stored in the Backend UCM System from AutoVue**.

Mobile Pack

Using the AutoVue Mobile feature in AutoVue, you can create a Mobile Pack (a "packaged" file that contains the base file, all the external resources—fonts, XRefs—needed to fully display the file, and existing markups for the file).

When you are finished working with the Mobile Pack, you can update your changes to the backend UCM system. You can synchronize all of the markups created in the Mobile Pack to your backend system. These markups will be associated with the file in the backend system from which you originally created the Mobile Pack.

For more information on Mobile Pack, refer to the *AutoVue Web Version User's Manual*.

Intellistamp

One of the new supported markup entities is Intellistamp. The Intellistamp markup entity lets you create a stamp that includes document and user information (metadata) pulled directly from the backend UCM system.

When an Intellistamp is added, it automatically retrieves the current value of the attributes from the document records. However, it is possible to change these values and set the new values back into the system through the Intellistamp.

To use the Intellistamp, a stamp definition and background image should be setup by the administrator. Oracle VueLink for Oracle UCM comes with a predefined stamp and image. The default stamp includes the following:

- Document's Title
- Document's Author
- Document's Creation Date
- Document's Revision

For information on adding and creating an Intellistamp, refer to the “Creating an Intellistamp” section of the *AutoVue Web Version User’s Manual*.

Appendix

Creating XRefs Based on CAD Folio Template

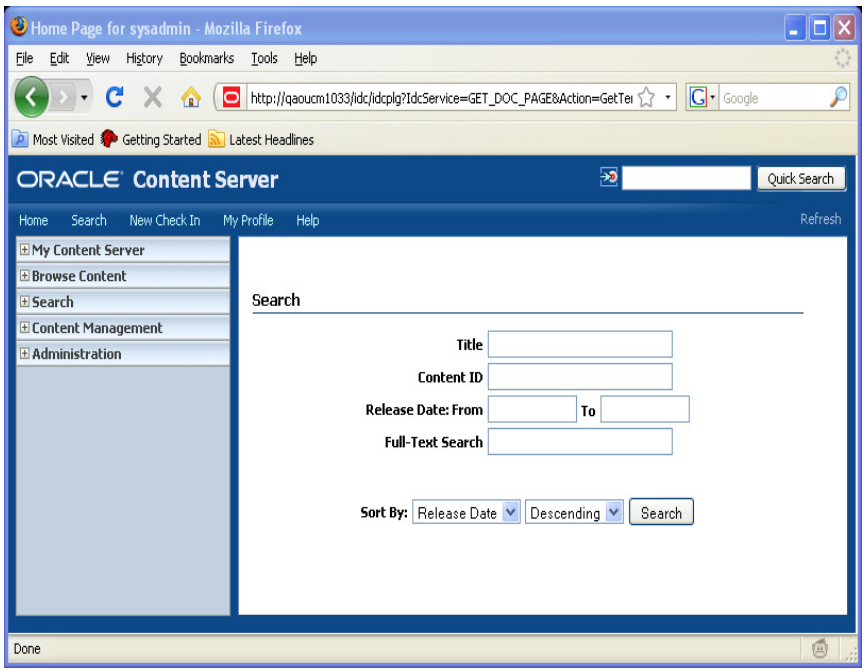
The following steps explain how to create external references (XRefs) based on the CAD Folio template. For demonstrative purposes, a 2D AutoCAD design example is provided. For our example, the master file is *main.dwg*, and it's associated XRefs are xref-1.dwg, xref-2.dwg, xref-3.dwg, and xref-4.dwg.

1 Run your web browser.

2 Login to the Oracle UCM.

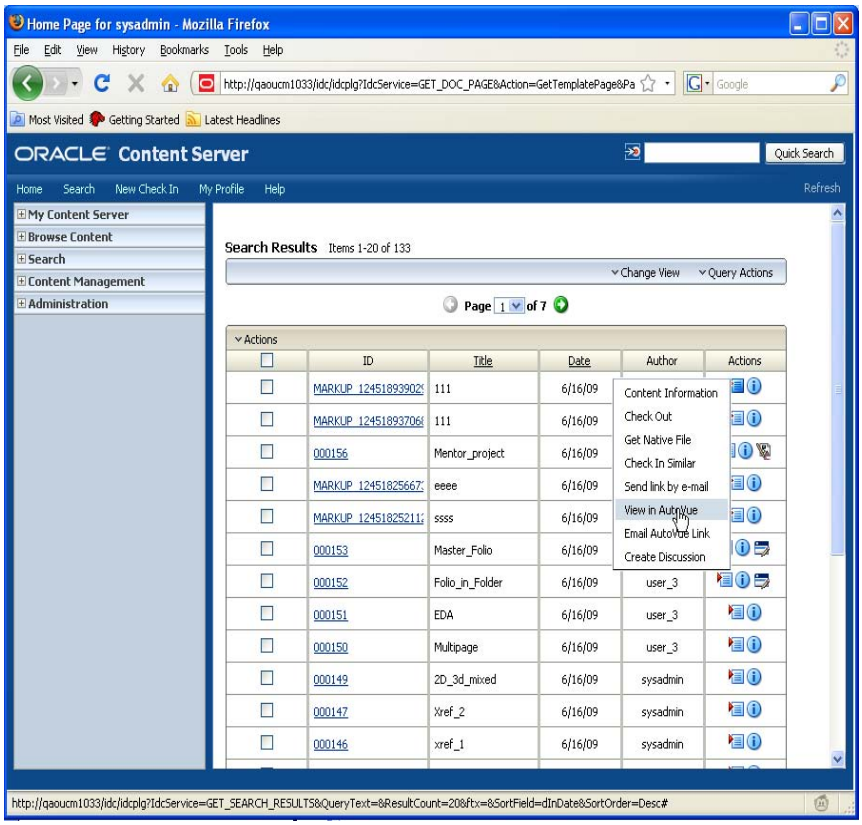
3 If required, enter your username and password.

The Search page appears.



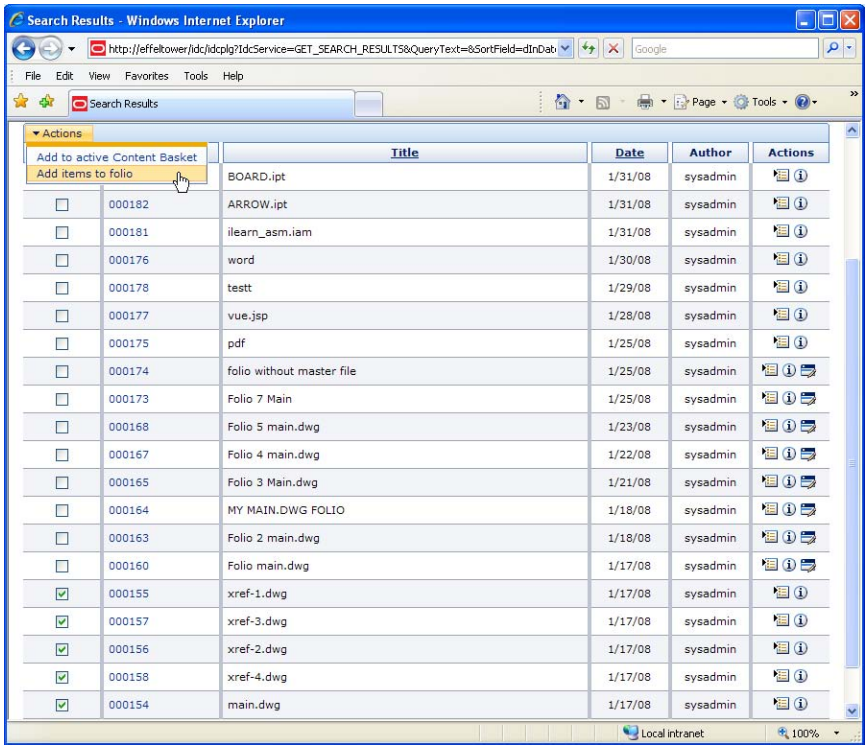
4 Click **Search.**

The Search Results page appears.



5 Scroll down the page and select the check boxes to the left of the master file and it's associated XRefs.

For our example, the **main.dwg, xref-1.dwg, xref-2.dwg, xref-3.dwg,** and **xref-3.dwg** check boxes are selected.



6 From the **Actions** menu, select **Add items to folio.**

The Add Item To Folio dialog box appears.

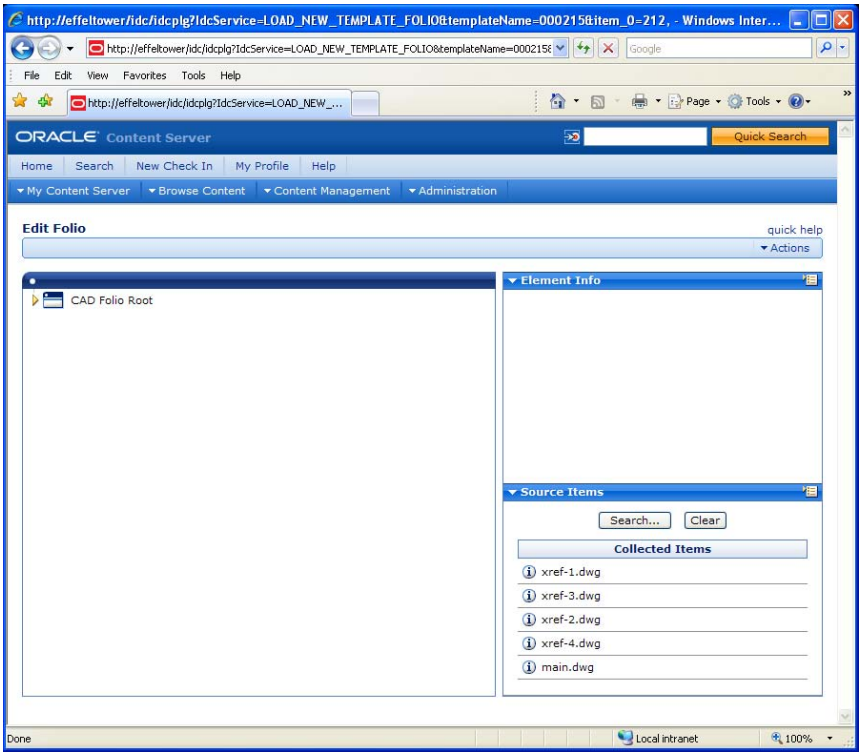
7 Select the **New folio** option, and then click **Next.**

The Pick Folio Type page appears in the dialog box.

8 Select the **Advance Folio** option, and then from the Folio Templates list, select **Folio Template for CAD with XRefs.**

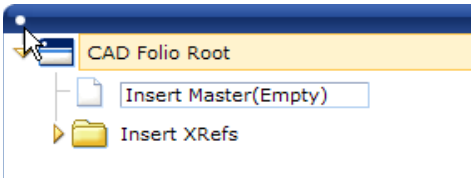
9 Click **Load folio.**

The dialog box closes and the Edit Folio page appears in the browser. The folio template appears on left side of the page and the selected master file and XRefs appear in the Source Items window.



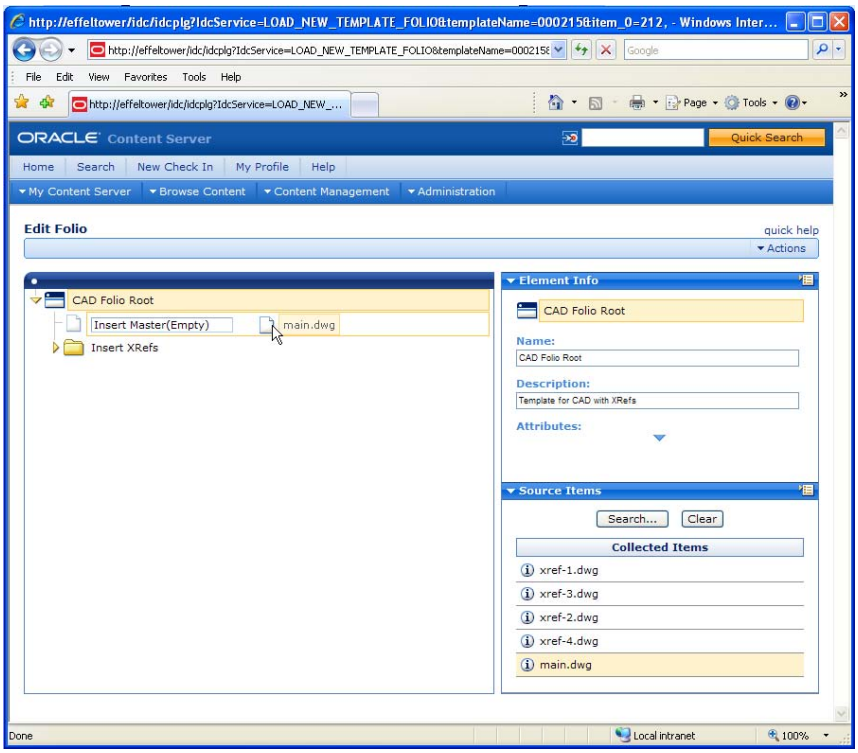
10 Click **CAD Folio Root** to expand.

Insert Master(Empty) and Insert XRefs appear as subdirectories of CAD Folio Root.



11 From the Source Items window, move the master file from the Source Items window into **Insert Master(Empty)** file using a drag-and-drop operation. The file is assigned the name of the master file.

For our example, *main.dwg* is dragged from the Source Items window into the Insert Master(Empty). The file is renamed to main.dwg.

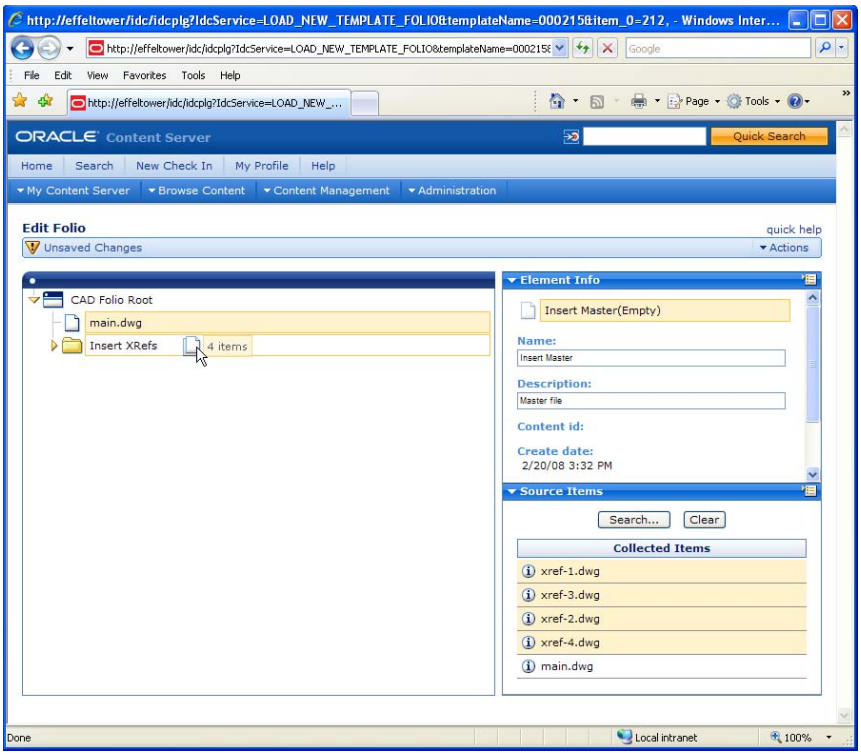


Note: In the Element Info panel, do not change the default name. For example, “Insert Master”

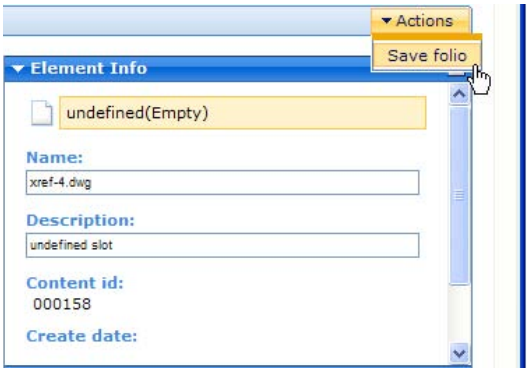
12 From the Source Items window, move the associated XRefs to the **Insert XRefs** folder using a drag-and-drop operation.

Note: To select multiple files from the Source Items window, press the **Shift** or **Control** keys while selecting.

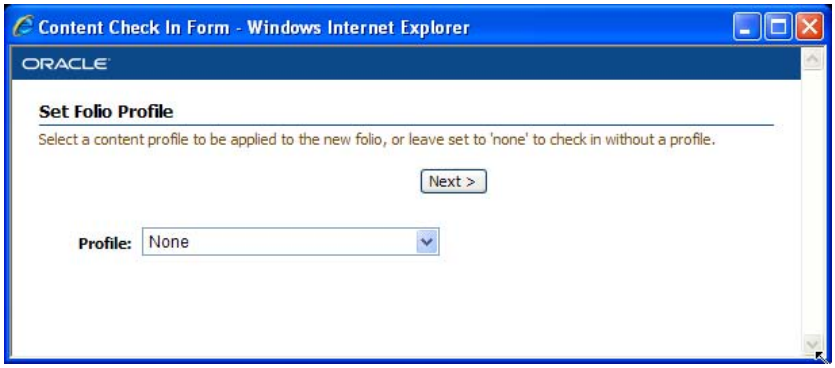
For our example, xref-1.dwg, xref-2.dwg, xref-3.dwg, and xref-3.dwg are dragged from the Source Items window into the Insert XRefs folder.



13 To save the folio, from the **Actions** menu, select **Save folio.**

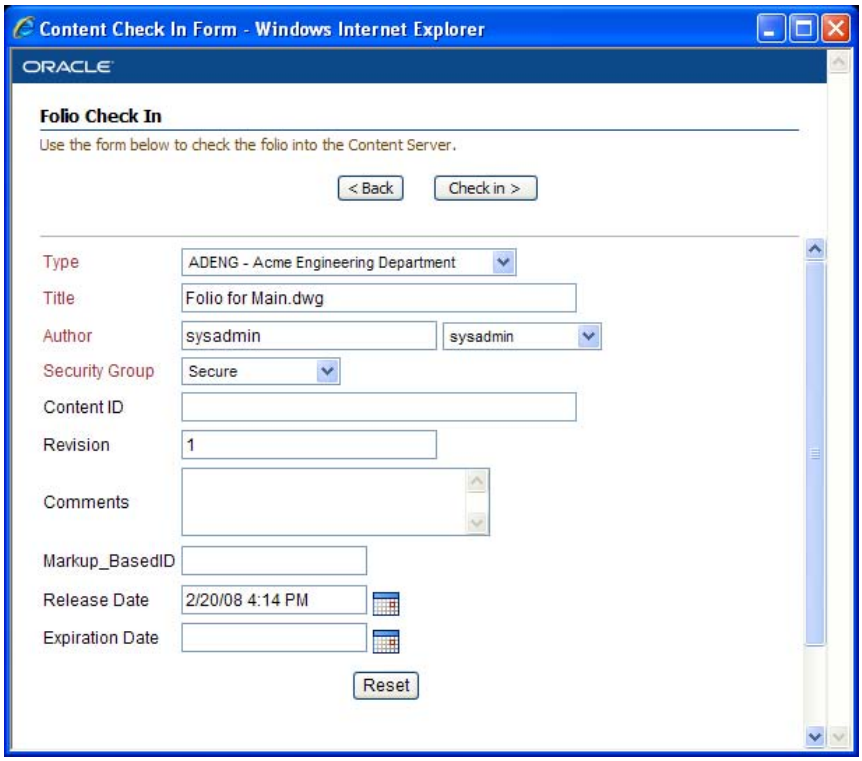


The Content Check In Form dialog box appears with the Set Folio Profile page loaded.



14 Click **Next.**

The Folio Check In page appears.



15 From the Type list, select a type.

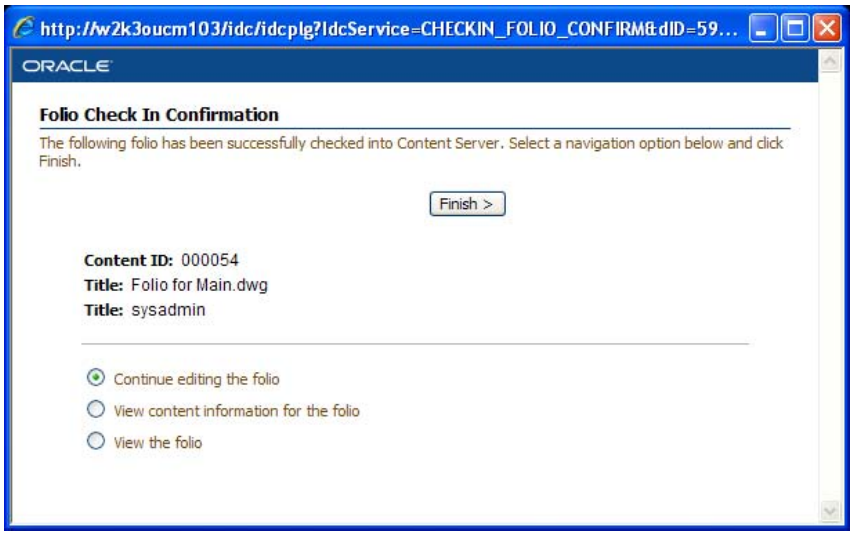
For our example, ADENG - Acme Engineering Department is selected.

16 Enter a title name in the **Title** field.

For our example, the title is Folio for Main.dwg.

17 Click **Check In.**

The Folio Check In Confirmation dialog box appears.



18 Click **Finish.**

View the newly created Folio in AutoVue.

Linking Master File to Folio

You can also link a master file to its folio so that the XRefs are retrieved and displayed when you view the master file.

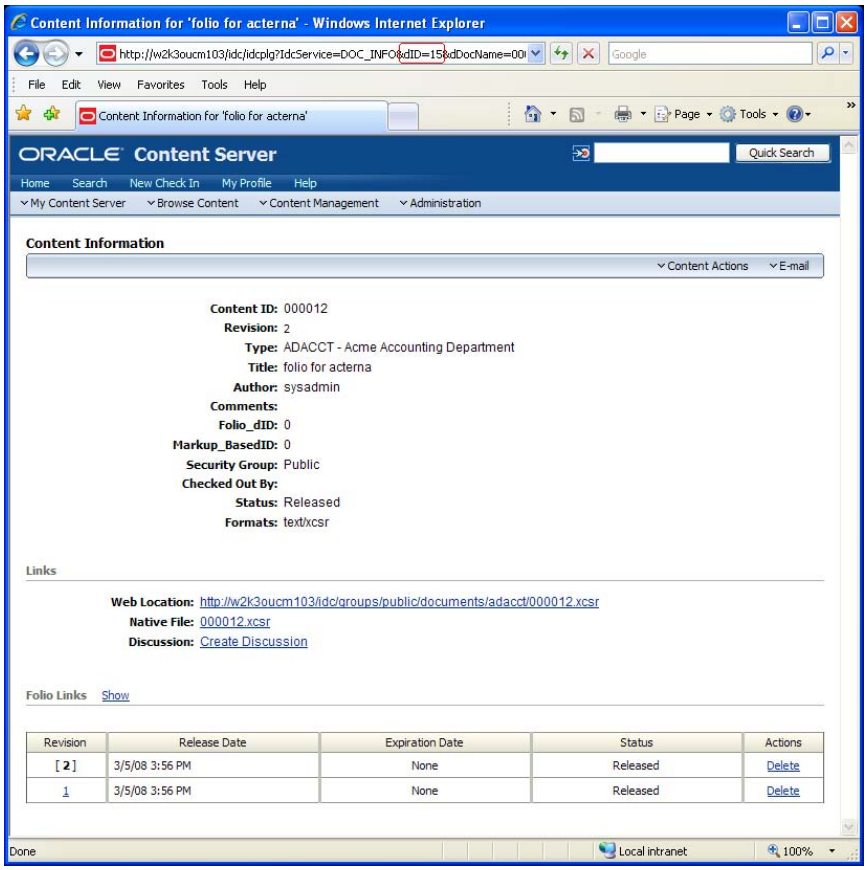
Assuming a master file and its XRefs are checked into UCM and an XRef folio is created using the CAD Folio template—see **Creating XRefs Based on CAD Folio Template—**do the following:

1 Go to the Search Results page.

See Viewing Documents

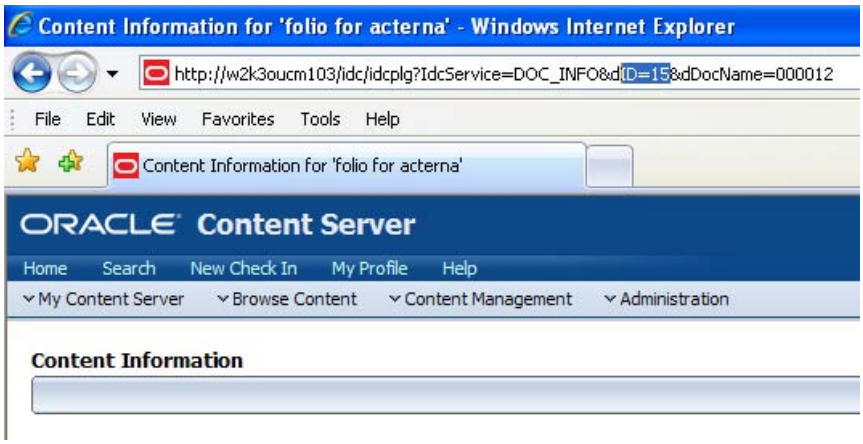
2 To the right of the *XRef folio,* under the Actions column, click **Info** .

The Content Information page appears.



3 From the Address bar, note the dID value of the folio.

For our example, the dID value is *15.*



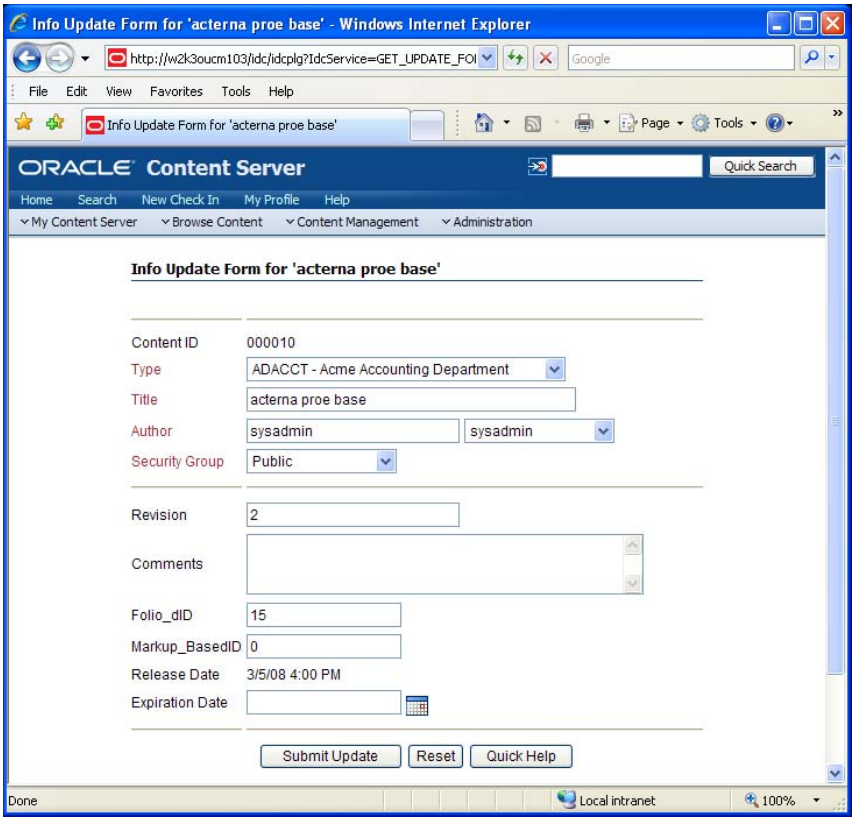
4 Click the **Back** button on the web browser toolbar to return to the Search Results page.

5 To the right of the *master file,* under the Actions column, click **Info** .

The Content Information Page appears.

6 From the **Content Actions** menu, select **Update.**

The Info Update Form page appears.

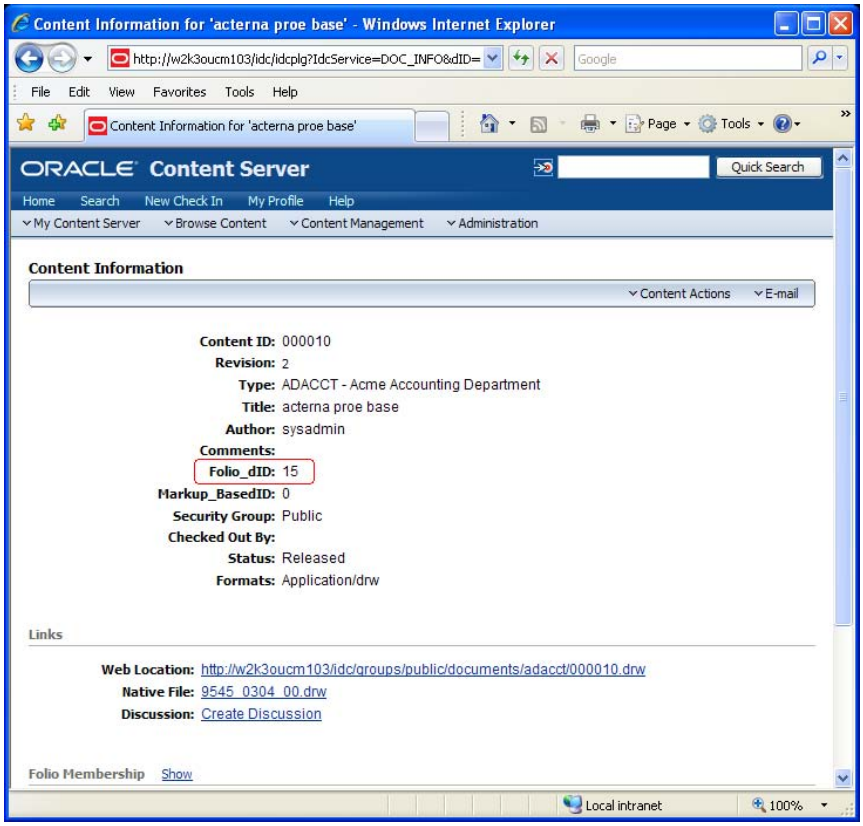


7 In the **Folio_dID** field, enter the folio dID.

For our example, “15” is entered in the field.

8 Click **Submit Update.**

The Content Information page of the master file appears with the updated Folio_dID.



9 From the **Content Actions** menu, select **View in AutoVue.**

AutoVue opens and displays the master file and XRefs defined in folio.

Note: It is important to keep a 1:1 relation between a master file and its XRef folio. This means that every time a new revision of the master file is created, it must be linked to a new revision of folio and vice versa.

Feedback

Oracle products are designed according to your needs. We would appreciate your feedback, comments or suggestions. If at any time you have questions or concerns regarding Oracle VueLink for Oracle UCM, call or email us. Your input is an important part of the information used for revision.

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