

VueLink for SharePoint

***An interface between
AutoVue Client-Server Edition and
Microsoft SharePoint Server***

User Manual

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Introduction

VueLink for SharePoint provides an interface between Windows SharePoint Services/SharePoint Portal Server (SharePoint) and AutoVue Client Server Edition. This interface enables you to add powerful viewing and markup capabilities to your SharePoint via a Web browser in an intranet or the Internet.



VueLink and AutoVue will 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, as well as the markups of your co-workers.
- Security linking to SharePoint in NTLM or basic authentication mode.

This manual is intended for the users of VueLink.

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 and AutoVue SolidModel Professional.

AutoVue Professional and AutoVue SolidModel Professional provide markup/annotation/redlining features. Refer to the AutoVue documentation for further information about the specific features and file formats supported by each AutoVue product.

Functional Overview

VueLink for SharePoint adds document viewing and markup capabilities to SharePoint server. It provides a seamless interface between SharePoint server and AutoVue Server via a web browser in and Intranet/Internet environment.

Markups/Annotations/Redlines are automatically saved in the Library defined in SharePoint during VueLink installation and are available for other 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 markup Library.

VueLink for SharePoint and AutoVue provides 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 more than 450 2D, EDA, 3D Engineering, and Business document formats.
- Simultaneously work with multiple markup layers and files.
- Create markups/redlines/annotations 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, Master and Consolidated markup files.
- Associate 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 header, footers and watermark information queried from specified document attributes.

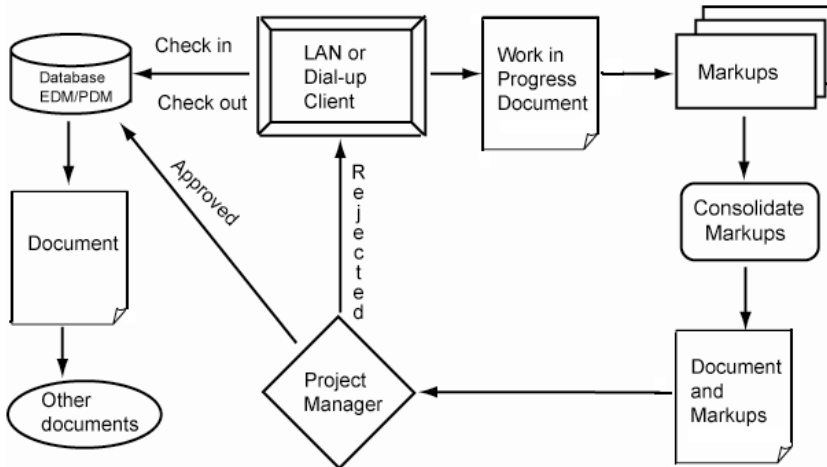
VueLink for SharePoint also provides you with a basis to which other powerful functions can be added via custom designed tools to further enhance your SharePoint installation. Custom designed tools offer many possibilities. For example, you could create 'intelligent' custom stamps such as an Engineering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

In addition, custom applications could be created to extract relevant information from an AutoCAD or MicroStation file, and automatically link it with information from your SharePoint library or other system. This brings the concept of intelligent drawings to a new level.

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 SharePoint 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.



At 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 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 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 versions of the document may be produced during this process.
- **Users of documents:** Once the review cycle is complete, possibly involving several versions 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 SharePoint Library. 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 multiple markup files simultaneously. If the document currently displayed has registered markups, a red lightbulb button 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

With the Compare 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 displays in a third viewing window. This feature is very useful for finding similarities and differences in different versions of a drawing.

Conversion

Documents can be converted from any of the AutoVue-supported file formats to popular graphics formats such as TIFF.

Engineering Documents

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

Cached Metafiles

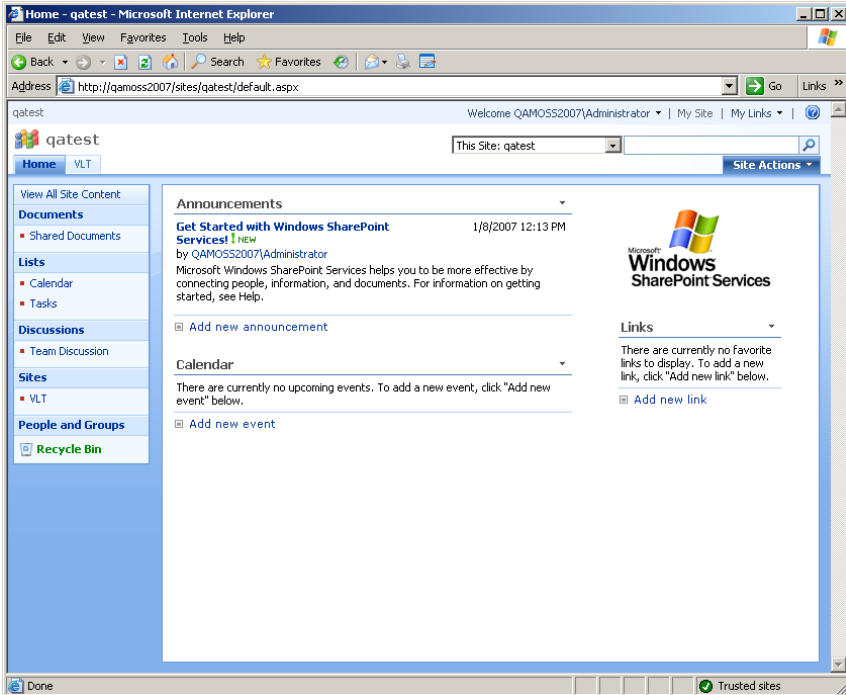
With AutoVue Server, it is possible to enhance the viewing performance of large drawings by using cached metafiles. A *metafile* is a lightweight format developed by Cimmetry, and represents a true replica of the original format.

Every time you view a file with AutoVue and you close the applet window or view another file, AutoVue automatically generates a metafile and checks it into SharePoint Library as a rendition to the original format (the location inside SharePoint is set during VueLink installation).

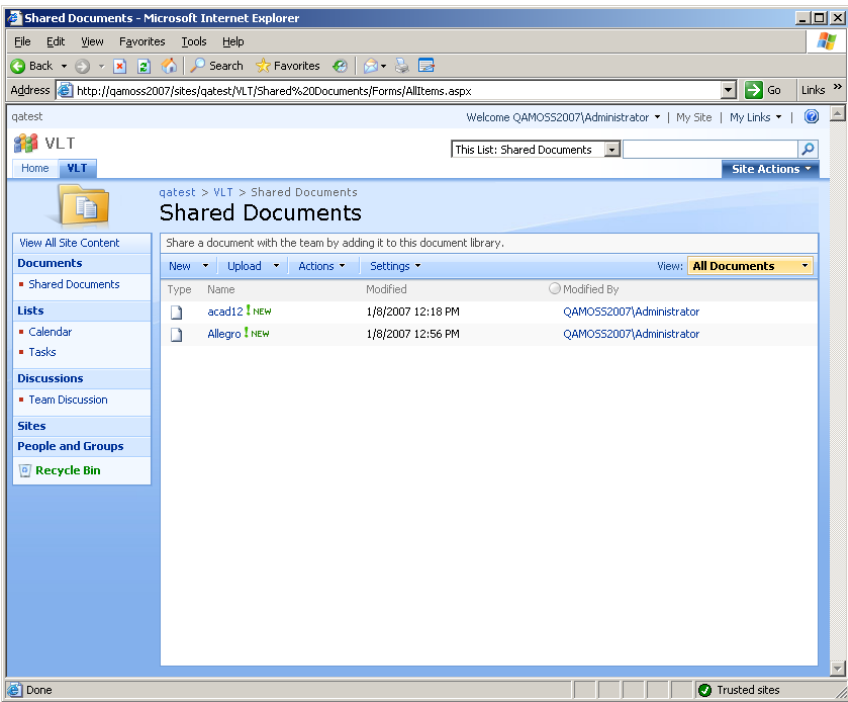
When viewing a file, AutoVue checks if a cached metafile rendition exists inside SharePoint Library. If there is one, AutoVue checks it out instead of the native file.

Viewing Documents

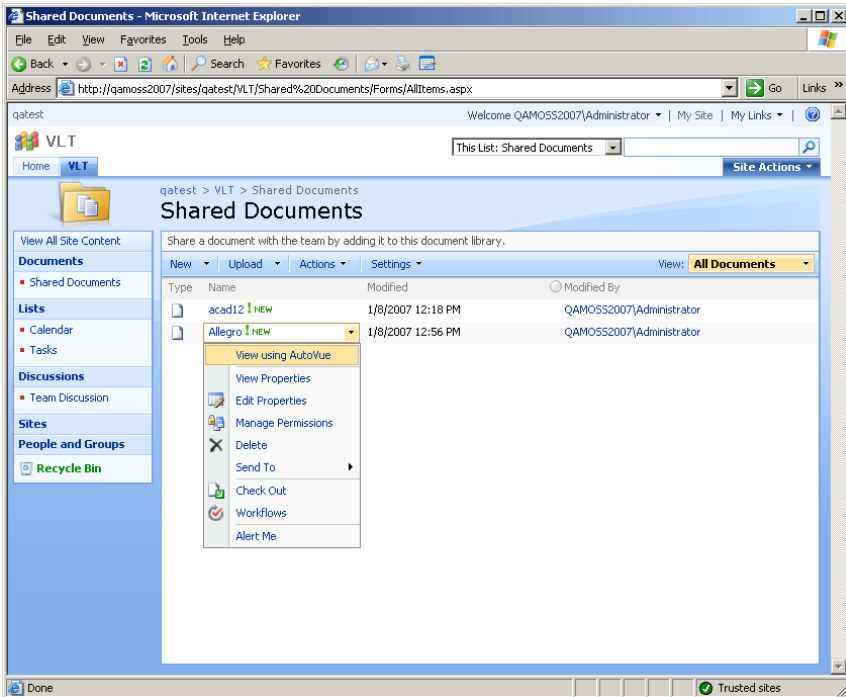
- 1 Run your Web browser, and then go to the Top Level site home page.
For example (default Top Site): <http://myserver/>
For example: <http://myserver/sites/mytopsite>
- 2 If it is required, login by entering your User Name and Password.



3 Choose a List from anywhere inside the Top Site (e.g. Shared Documents).

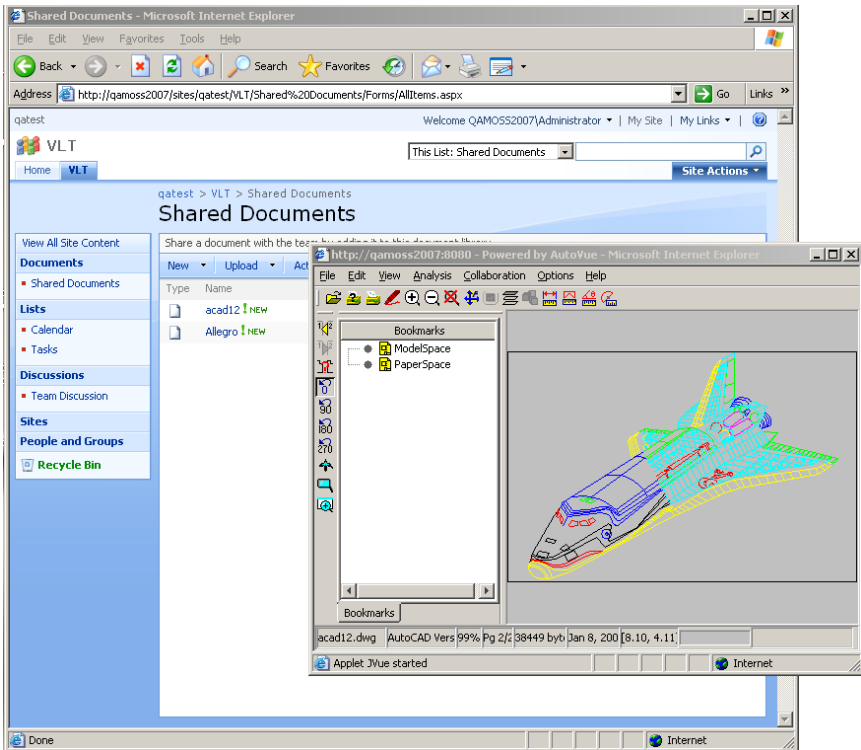



- To view the document's current version, move the mouse over the document's name in the Name column, click the arrow that opens the content menu, then select **View using AutoVue**.





- AutoVue applet is launched and it prompts for login information. Enter the user name and password.
Note AutoVue prompts for logon only once per session.

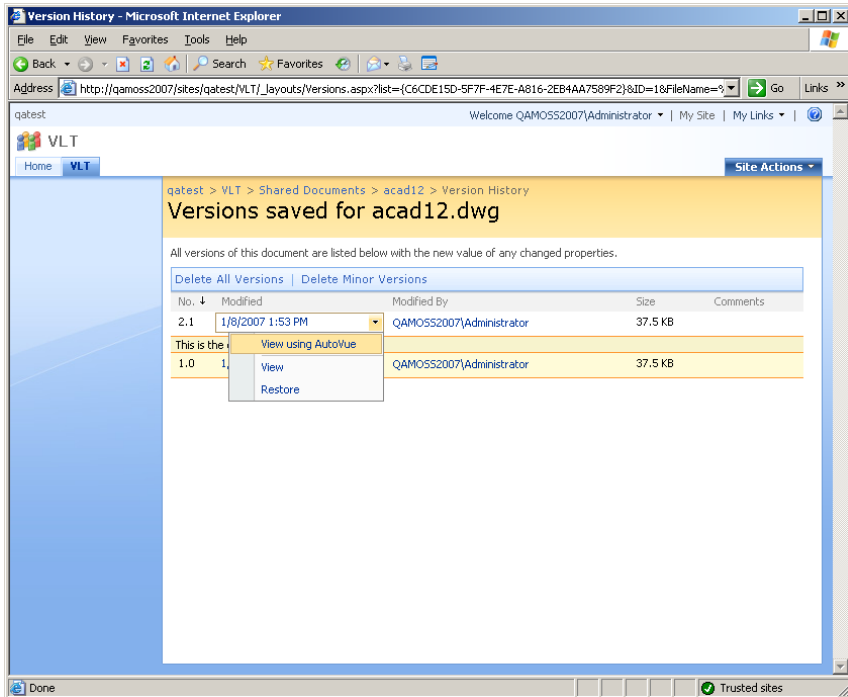
The selected file displays in the AutoVue Client.



Note To view a file from a local disk or network drive, select a file with the File Open  button.

- A red light bulb 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.
- 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.

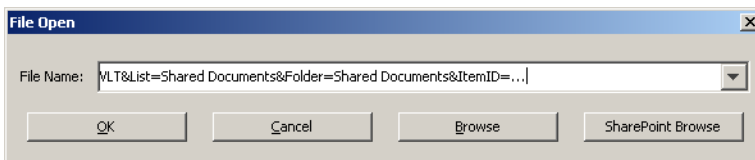
- To view a specific version of a Document, click the Version History menu to go into Version History Page. Then bring up the content menu for desired version and select **View using AutoVue**.



Accessing DMS Files

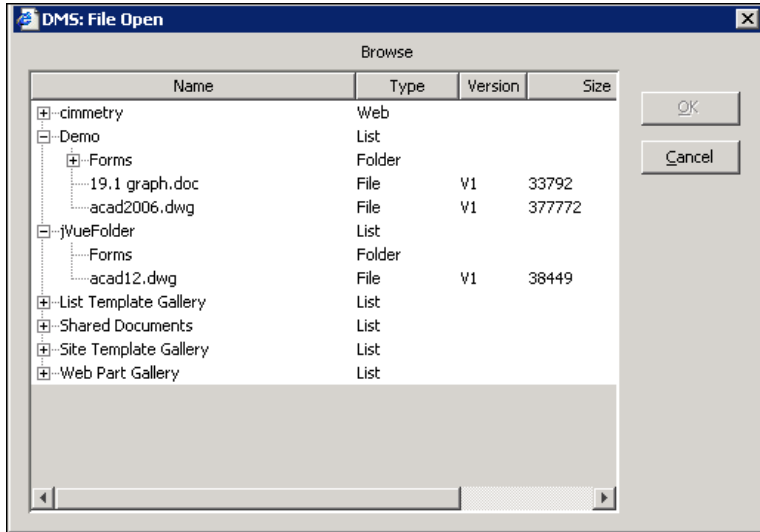
AutoVue lets you access files that are in the SharePoint library from within the AutoVue window. You can use **SharePoint Browse** to browse through the SharePoint library.

If any operation requires you to open files, the **File Open** dialog box lets you browse the SharePoint library.



SharePoint Browse


- 1 Click on the SharePoint Browse button in the **File Open** dialog. A dialog box appears that lets you browse the SharePoint library.
- 2 Browse through the repository and select a file. Click **OK** to open the selected file.

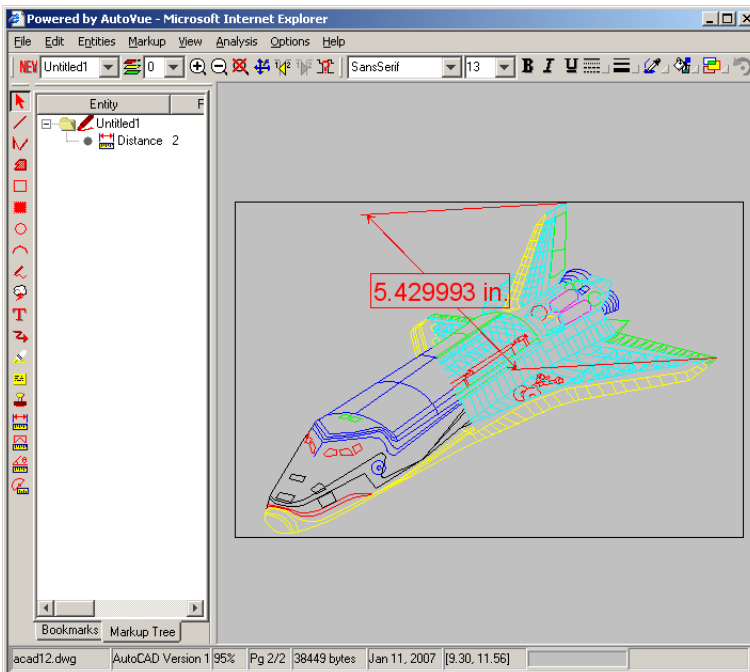


Markup File Management

Creating Markups


- 1 Display a document within the AutoVue Server.
- 2 Enter Markup mode by selecting **File > Markup** or **RMB > Markup**.

The Markup  button is also available in the Toolbar.

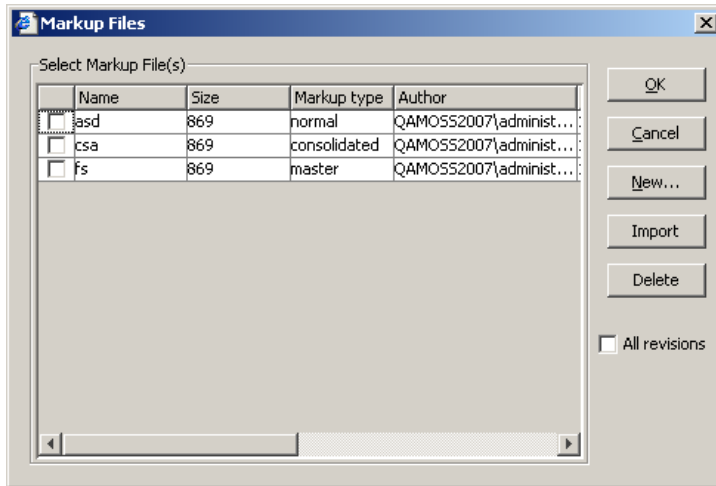


The current active document displays in Markup mode ready for you to create markups.

Note If you have just finished creating a markup file and you would like to create a new markup file, select **File > New**.

The New  button is also available in the Toolbar.

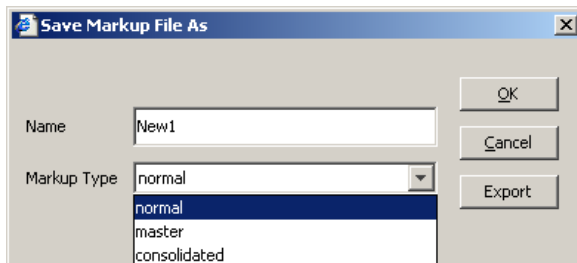
- 3 If there are existing markups, you will be prompted with the Open Markup dialog box. Click the **New** button.



Saving Markups

To save a new markup file:

- 1 Select **File > Save**.
The Save Markup File dialog box appears.



- 2 Complete the **Name** and **Title** boxes.
- 3 Select the **Markup Type**. There are three types: normal (default), master and consolidated.
- 4 Click **OK**.
The markup file is saved and remains in the AutoVue viewing window.

To save an existing markup file:


- 1 Select **File > Save**.

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

Displaying Existing Markups

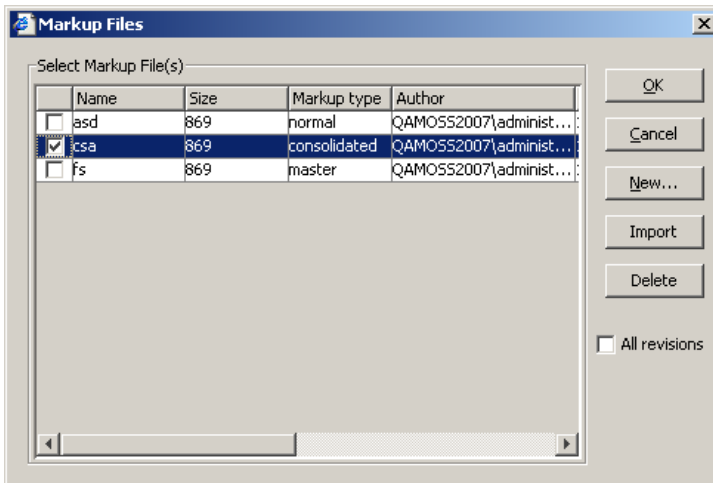
After the selected file displays in AutoVue Server:

- 1 Enter Markup mode by selecting **File > Markup** or **RMB > Markup**.

The Markup  button is also available in the Toolbar.

- 2 Select **File > Open**.

The Open Markup dialog box appears.




- 3 Select the markup file(s) to view, and then select the active markup.
- 4 Click **OK**.

Promoting Markups

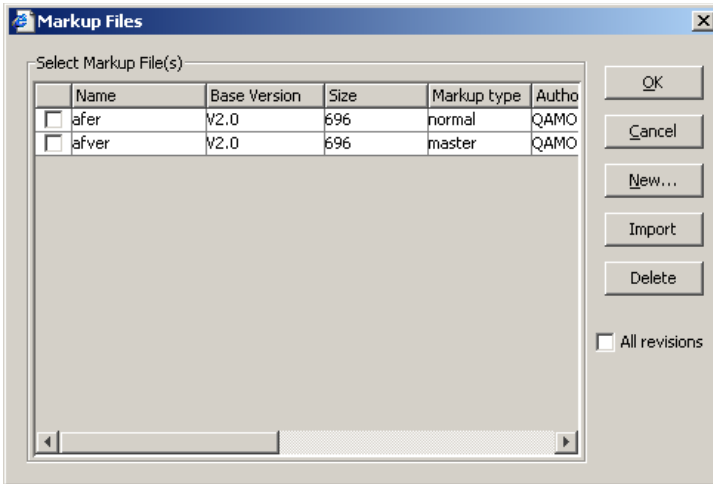
It is possible to promote markups from an earlier version of a document to the current version. When markups are promoted, they are saved against the new version of the document.

After displaying a file with AutoVue Client Server:

- 1 Enter Markup mode by selecting **File > Markup** or **RMB > Markup**. The

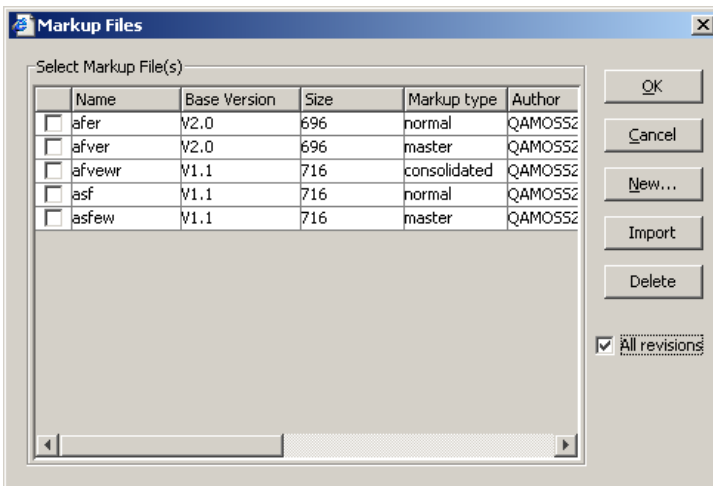
Markup  button is also available in the Toolbar.

The Open Markup dialog box appears.



- To display the markup files from previous versions of the base file, click the **All revisions** check box.

The previous markup files display for the previous version of the base file. Refer to the following figure (Note: Some columns were moved to show the Base File Version column):




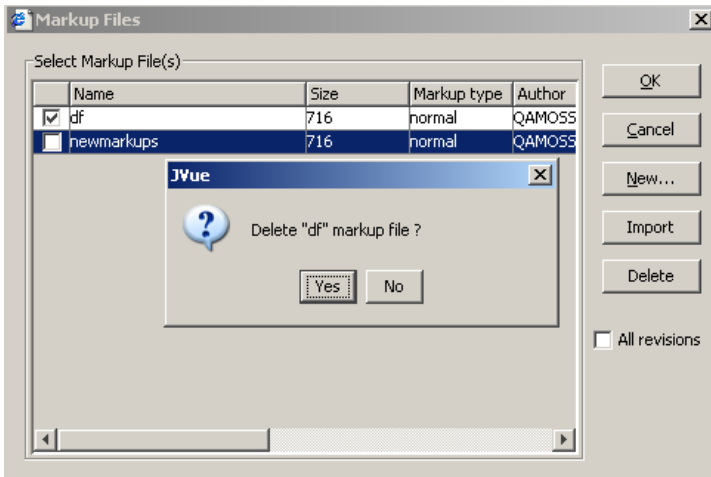
- Select one markup file from the previous version, such as version 1 in the example. The markup file is shown with the current version base file.

- 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 displaying a file with AutoVue Server:

- Enter Markup mode by selecting **File > Markup** or **RMB > Markup**. The Markup  button is also available in the Toolbar. The Open Markup dialog box appears.
- Select one or more markups from the list.
- Click the **Delete** button. A prompt message appears as shown to let you confirm the deletion of the desired markups.

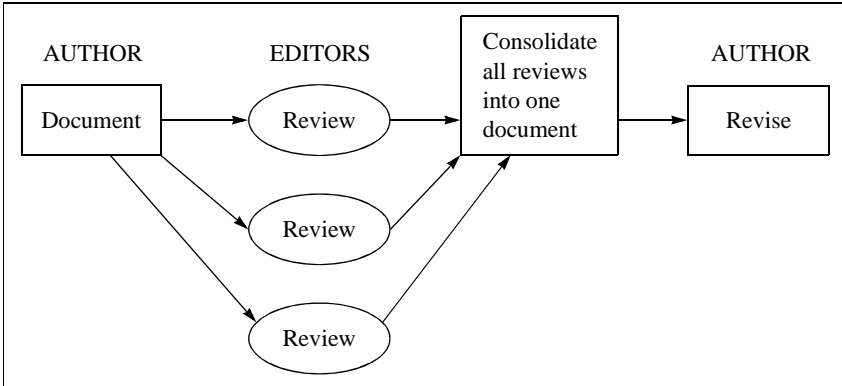


- Click **Yes**. The selected markup files are deleted from the list of markups in the Open markup dialog box. The Open markup dialog box displays the remaining markup files.

Consolidating Several Markups into a single Markup

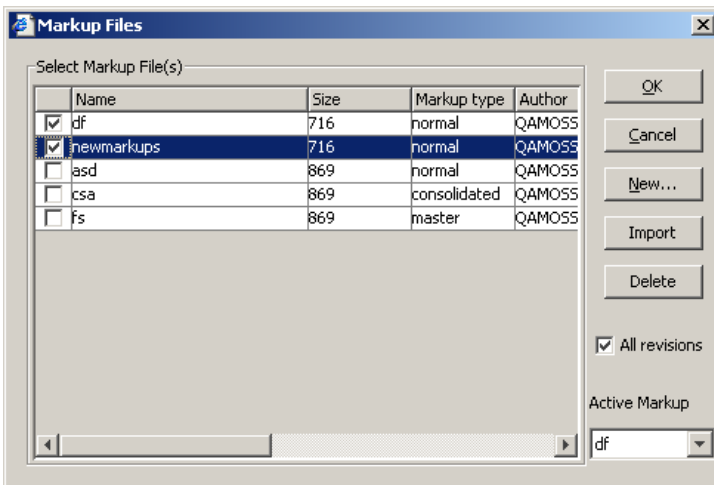
The Consolidate option allows you to create a new markup file that combines copies of selected parts of different markup files. This option is available only if

multiple files have been loaded using the Multi-load option. During the review cycle, consolidation simplifies document revisions by providing the author with one consolidated markup file rather than several markup files.



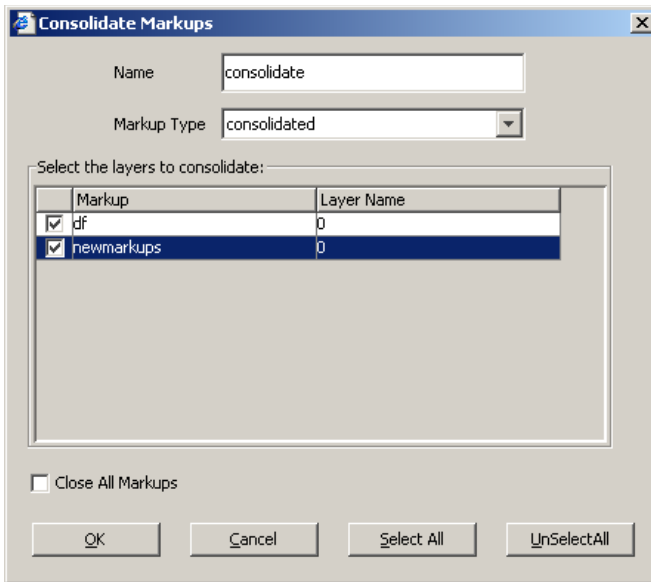
After the selected file displays with the AutoVue Applet:

- 1 In Markup mode, select **File > Open**. The List of Markup File(s) dialog box appears.
- 2 Select some markup files to view, then select the active markup file. Your new markups will be saved to the latter.



- 3 Click **OK**.
All the selected markup files display simultaneously.
- 4 Select **File > Consolidate**.

The Consolidated Markups dialog box appears.



- 5 Select the markup layers that you would like to consolidate, then enter the name of the consolidated markup file.
 - 6 Click **OK**.
 - 7 Enter Markup Name and Title.
 - 8 Click **OK**.
- The consolidated markup file is saved.

Saving as Master Markups

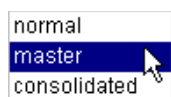
Master markups immediately display when their base document displays. When viewing a document, Master markups automatically load and display in Markup mode. Although non-owners can view Master markups, they are not able to change the Master markups or create their own markups based on them.

AutoVue tags markup files as normal, consolidated or master.

After you have finished marking up a document, complete the following steps to save a newly created markup file as a Master markup:

- 1 Select **File > Save** or **File > Save As**.
The **Save Markup File** dialog box appears.
- 2 Complete the **Name** field

- 3 Select **master** for Markup file type.



- 4 Click **OK**.

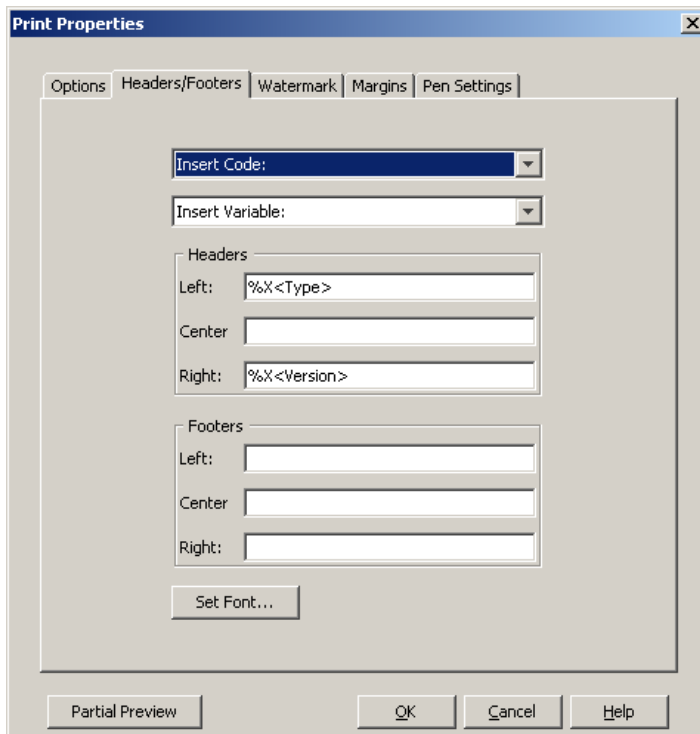
The Master markup file is created and stored in the Markup database.

Now when another user logs on and views this file, AutoVue Markup mode automatically launches, loads your Master markups, and displays them.

Printing Headers, Footers and Watermarks

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

- 1 Select **File > Print**.
The **Print Properties** dialog box appears.
- 2 Customize the Print Properties (see the following figure).



Headers/Footers Group

The Headers/Footers 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** boxes or select from the **Insert Code** drop-down list to set the information for headers and footers.
- 3 When you have finished, click **OK**.

Watermarks Group

A watermark prints faintly and transparent 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 the **Font** button to customize the font.
- 4 Click **OK** when you are done.

Conversion

With AutoVue Client Server, it is possible to convert documents to other formats, such as TIFF and BMP. When you convert to TIFF, AutoVue lets you check the converted document back into SharePoint as a rendition of the original document.

Note Only the TIFF format is supported by VueLink to be saved back in DMS as a rendition. Other formats can be saved to the file system.

After displaying a file with AutoVue Server:

- 1 Select **File > Convert** from main menu.
The Convert dialog box appears.
- 2 Select the desired format from the **Convert To Format** drop-down list.
- 3 If you selected the TIFF format, the **Output: Rendition** checkbox is enabled. Select the **Output: Rendition** checkbox if you wish to save the TIFF as a rendition in the SharePoint library.
- 4 Modify the options for **Scale, Size, Region, Pages** and **Color Depth** if required.
- 5 Click **OK** to start conversion.
AutoVue converts the file to the selected format. If you enabled the **Output:Rendition** checkbox, the converted TIFF is checked into the SharePoint library in the same location as the native file.

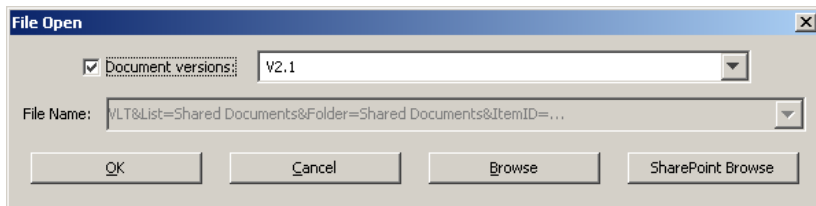
File Compare

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 displays in a third window. This feature is very useful for finding similarities and differences in revisions of a drawing.

With AutoVue Server, you can compare the current version of a document with any of its past versions.

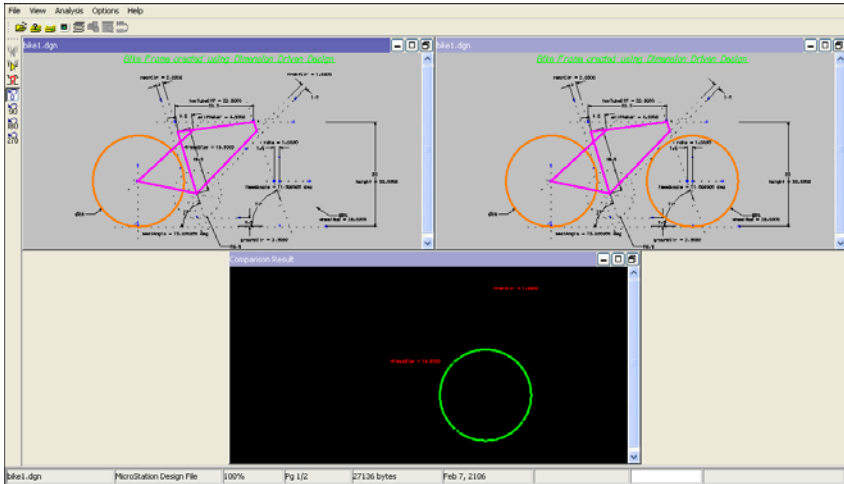
After displaying a file with AutoVue Server:

- 1 Select **Analysis > Compare**.
The Compare dialog box appears.
- 2 Select a version from the **Document versions** drop down list.



- 3 To select a file from the SharePoint library, click **SharePoint Browse**.
The **SharePoint Browse** dialog box appears. Browse through the SharePoint library and select a file.
- 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.
AutoVue displays the files in comparison mode.
AutoVue Server displays 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.

In the window with the comparison result, additions are green, deletions are red, and unchanged parts are blue.

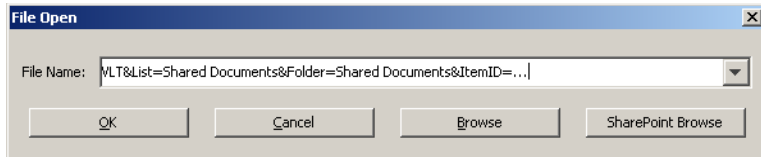


File Overlays

With AutoVue, it is possible to specify a file saved in the SharePoint Library for an overlay.

- 1 Select **Analysis > Overlay**.

The File Open dialog box appears.



- 2 To select a file from the SharePoint library, click **SharePoint Browse**. The **SharePoint Browse** dialog appears. Browse through the SharePoint library and select a file.
- 3 To select a local file, click **Browse**. Browse through the local file system and select a file.
- 4 To specify a URL, type in the URL in the **File Name** field.
- 5 Click **OK** after you select a file.

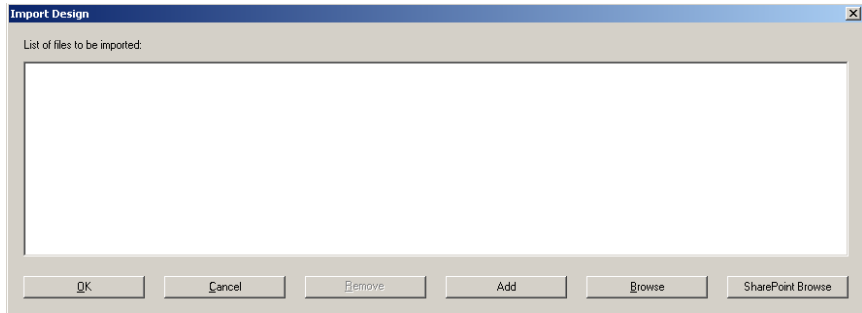
Note For help on accessing the SharePoint library using SharePoint Browse, see [Accessing DMS Files](#).

MockUp

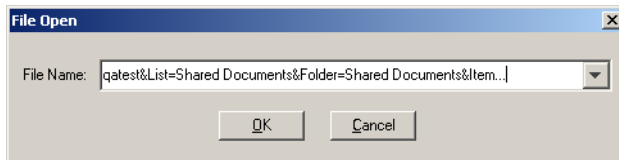
With AutoVue, it is possible to import 3D files that are within the SharePoint library or to browse the local file system to select a file for import.

- 1 View a 3D document from SharePoint in AutoVue.
- 2 Select **Analysis > Mockup**.

The **Import Design** dialog box appears.



- 3 Click **Add** to add files. In the **File Open** dialog box that appears, select the file and click **OK**.



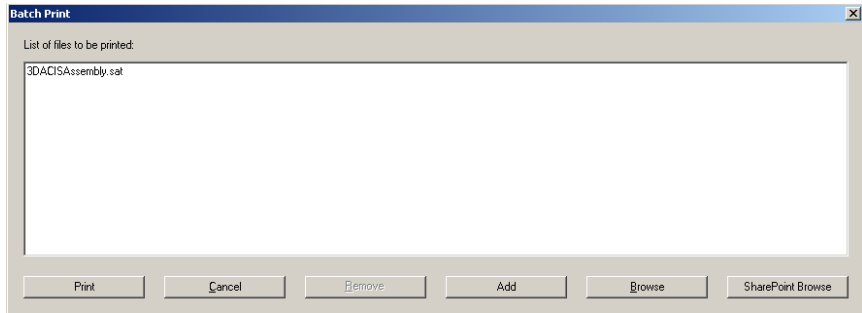
- 4 To select a local file, click **Browse** in the Import Design dialog box. Browse through the local file system and select a file.
- 5 Click **SharePoint Browse** to select a file from the SharePoint library. The **SharePoint Browse** dialog appears. Browse through the SharePoint and select a file.
- 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 the SharePoint library using SharePoint Browse, see [Accessing DMS Files](#).

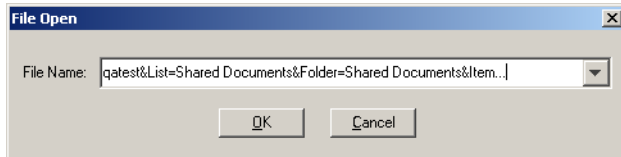
Batch Printing

With AutoVue, it is possible to print a set of files in a single batch. It is possible to select files that are in the repository to add to the list of files to be printed.

- 1 Select **File > Batch Print**.
The **Batch Print** dialog box appears.



- 2 Click **Add** to add files to the **List of files to be printed**. In the **File Open** dialog box that appears, select the file and click **OK**.



- 3 In the Batch Print dialog box, click **Browse** to select a local file. Browse through the local file system and select a file.
- 4 Click **SharePoint Browse** to select a file from the SharePoint library. The **SharePoint Browse** dialog appears. Browse through the SharePoint 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.

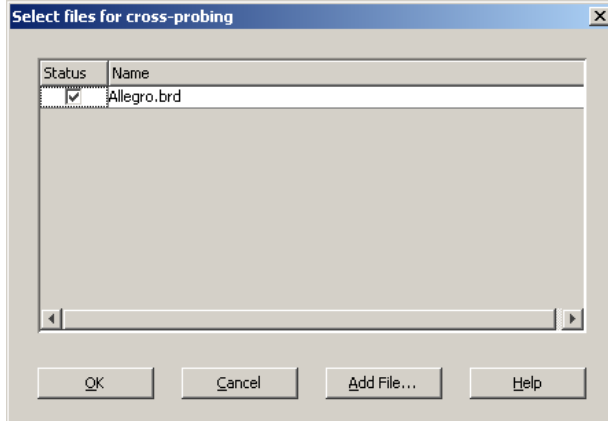
Note For help on accessing the SharePoint library using SharePoint Browse, see [Accessing DMS Files](#).

Cross Probing

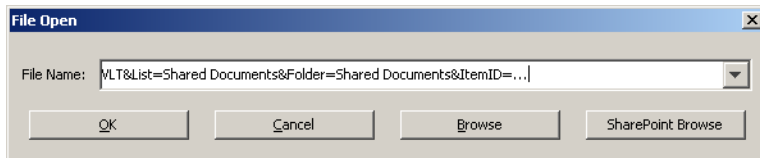
With AutoVue, it is possible to specify files saved in the SharePoint library for cross probing.

- 1 Select **Analysis > Cross Probe**.

The **Select files for cross-probing** dialog box appears.



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



- 3 To select a file from the SharePoint library, click **SharePoint Browse**. In the **SharePoint Browse** dialog that appears, browse through the SharePoint and select a file.
- 4 Click **Browse** to select a local file. 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 the SharePoint library using SharePoint Browse, see [Accessing DMS Files](#).

Feedback

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

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