

VueLink for Documentum

***An Integration between
AutoVue Web Edition
and Documentum***

User Manual

Contents

INTRODUCTION	1
Functional Overview	1
Why does the Documentum user need a Viewing/Markup tool?	3
Markup File Management	4
Other Useful Features	4
Compare	4
Conversion	4
Engineering documents	5
Cached metafiles	5
VUELINK FEATURES	6
Viewing documents	6
Viewing a document in Documentum Webtop	6
Virtual Documents	10
Viewing renditions in	
Documentum for Webtop	10
Viewing multi-content documents	10
Viewing pages in a multi-page Content file	10
Accessing DMS files	11
DMS Search	11
DMS Browse	13
Markups	14
Creating Markups	15
Saving Markups	15
Displaying existing Markups	16
Promoting Markups	17
Deleting Markups	19
Consolidating several Markups into a single Markup	19
Saving as Master Markup	21
Printing document attributes as headers,	
footers or watermarks	22
Printing in headers and footers	23
Printing as a watermark	24
Converting a document to another format	25
Comparing files	26
Cross Probing	28

MockUp 29
Batch Print 30
File Overlays 31
FEEDBACK 35
General Inquiries 35
Sales Inquiries 35
Customer Support 35

Introduction

VueLink for Documentum provides an interface between the Documentum Webtop and the AutoVue family of products. This interface enables you to add powerful Viewing and Markup capabilities to your Documentum Webtop via web browser in an intranet or the Internet.



VueLink and AutoVue will provide you with the following functionality:

- 1 Document viewing of native formats.
- 2 Graphically marking up documents using a rich set of graphical and textual tools.
- 3 Reviewing your Markups and the Markups of your coworkers.
- 4 Full security linking to the Docbase access control list (ACL).

This manual is intended for the users of VueLink, as well as, the System Administrator or other individual who performs 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 features. Refer to the User's manual for further information about the specific features and file formats supported by each AutoVue product.

Functional Overview

VueLink for Documentum adds document Viewing and Markup capabilities to Documentum Webtop. It provides a seamless user interface between Webtop clients and AutoVue. All Webtop clients are supported via a Web browser in an intranet/Internet environment. Markups are automatically saved on the Docbase server and are available for other users to edit or view depending on their document access level.

VueLink and AutoVue are also available with special handling capabilities for CAD documents created with AutoCAD or MicroStation directly from Documentum under the CADLink Review product name. If your needs include AutoCAD and/or MicroStation, please contact your Documentum account representative for more information. CADLink Review is developed by CADSpace Inc., a Documentum Signature Partner.

VueLink for Documentum 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 more than 200 2D, EDA & 3D Engineering and Business document formats.
- View multi-content objects.
- Simultaneously work with multiple Markup layers and files.
- 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.
- Graphically compare different revisions of engineering drawings.
- Print documents with header, footers and watermark information queried from specified document attributes.
- Create and store Adobe Acrobat PDF renditions of documents and associated Markups directly from your workstation (Adobe Acrobat Distiller required).

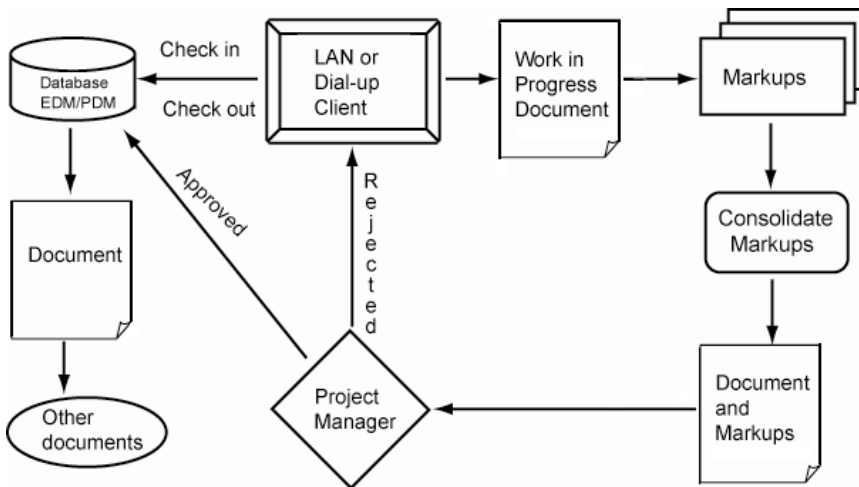
VueLink for Documentum also provides you with a basis to which other powerful functions can be added via custom designed tools to further enhance your Documentum installation. Custom designed tools offer many possibilities. For example, you could create 'intelligent' custom stamps such as an engineering stamp that 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 Documentum Docbase or other system. This brings the concept of intelligent drawings to a new level. All these features are available from your Web browser by using the AutoVue Web Edition.

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

Why does the Documentum user need a Viewing/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.



At minimum, there are 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 would be printed and sent to a list of reviewers. Each reviewer would provide feedback in several ways, directly annotate the paper output using a pen, attach sticky notes to the paper output, and create one or more annotation documents. The annotated document along with other material is then sent to a supervisor who will review the material, possibly from several reviewers and may consolidate the comments into one set. This set is then passed

back to the creator for making modifications to 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 in an annotation file in the Docbase server. 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 or a rendition. In addition, users have the option of displaying one or more Markup files simultaneously. If the currently displayed document 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 revision.

Other Useful Features

Compare

With the Compare feature, documents of the same type (raster or vector) are visually compared. The two selected files are simultaneously displayed in their own 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.

Conversion

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

Engineering documents

VueLink is fully equipped to handle complex engineering documents that may consist of external references (XRefs), 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 Oracle and represents a true replica of the original format.

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

There are two ways you can generate metafiles and cache them as renditions inside Documentum:

- [Online caching of metafiles](#)
- [Offline caching of metafiles](#)

Online caching of metafiles

Every time you view a file with AutoVue and you close the client or view another file, AutoVue automatically generates a metafile and checks it into Documentum as a rendition of the original format.

Offline caching of metafiles

Oracle has developed a utility that uses AutoVue server as a rendition tool to generate and check in metafiles into Documentum. For instructions on how to install and configure the offline utility, refer to readme.doc (“Utility for Caching Metafile Renditions for Documentum”) in:

<vuelink install folder>\metafile_utility.

VueLink Features

This section covers the following tasks or features in AutoVue and VueLink for Documentum:

- [Viewing documents](#)
- [Viewing renditions in Documentum for Webtop](#)
- [Viewing multi-content documents](#)
- [Accessing DMS files](#)
 - [DMS Search](#)
 - [DMS Browse](#)
- [Markups](#)
 - [Creating Markups](#)
 - [Saving Markups](#)
 - [Displaying existing Markups](#)
 - [Promoting Markups](#)
 - [Deleting Markups](#)
 - [Consolidating several Markups into a single Markup](#)
 - [Saving as Master Markup](#)
- [Printing document attributes as headers, footers or watermarks](#)
- [Converting a document to another format](#)
- [Comparing files](#)
- [Cross Probing](#)
- [MockUp](#)
- [Batch Print](#)
- [File Overlays](#)

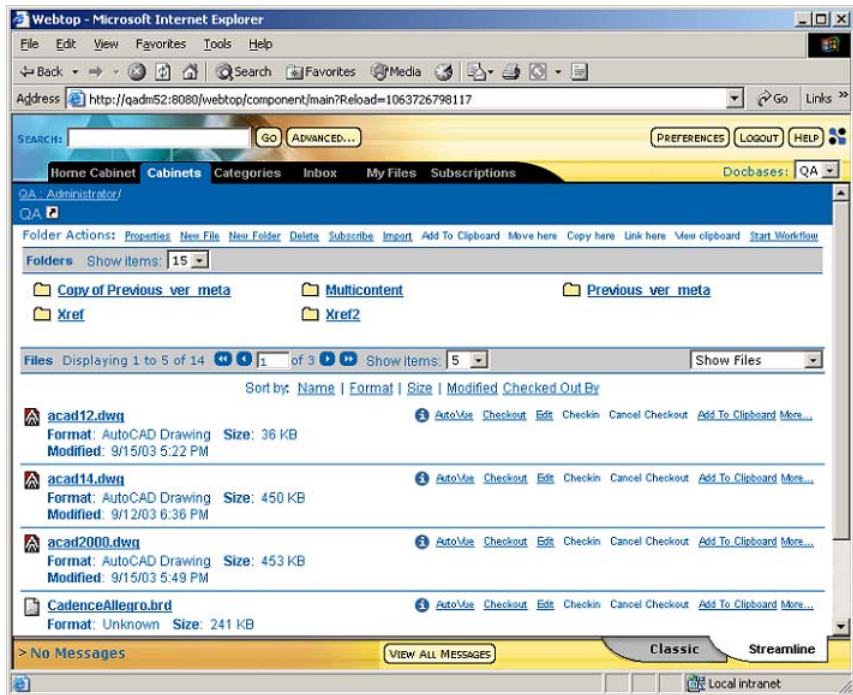
Viewing documents

To view documents from within Documentum and from within AutoVue, follow the appropriate instructions for Webtop.

Viewing a document in Documentum Webtop

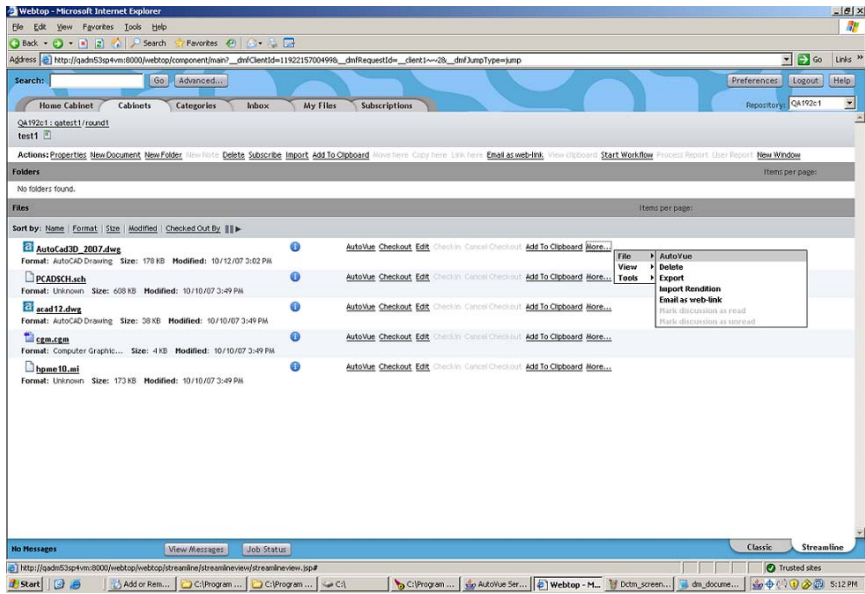
- 1 Open your Web browser and go to the Webtop home page.
Example: <http://doc42:8080/webtop>
- 2 Log on and go to the stream line interface.

3 Browse to the folder from where you want to view a file.

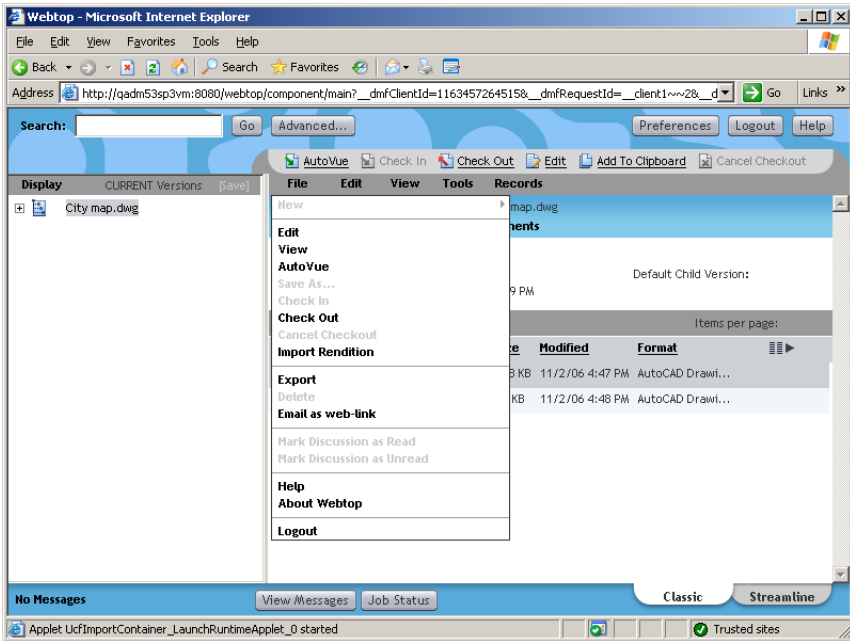


4 Click the AutoVue link next to the file.
AutoVue client loads the file.




Note: You can also launch AutoVue by clicking **File > AutoVue**.



In Classic View, you can also launch AutoVue by clicking **File > AutoVue**.



Note:

- To view a file from a local disk or network drive, select a file with the File Open icon .
- A red lightbulb button  on the left side of the AutoVue client 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 client status bar indicates that one of the components required to accurately and fully display the document is missing. 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.

Virtual Documents

VueLink for Documentum supports the XRef schema defined as virtual documents. If the relationship between the base file and the XRef file is defined, VueLink downloads and displays all XRefs for the base document.

Viewing renditions in Documentum for Webtop

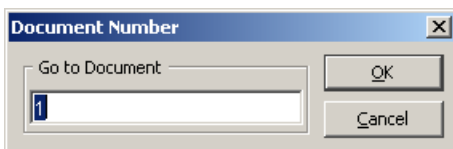
AutoVue displays all renditions from the list of supported file formats.

- 1 Select **View** and then **Renditions** for the file you want to view.
- 2 Click the rendition you want to view.
AutoVue client launches and displays the file you selected.

Viewing multi-content documents

Multi-content documents contain several files known as Content files. Complete the following steps for viewing a content file in a multi-content document.

- 1 Display a multi-content file in AutoVue.
- 2 From the **View** menu, select **MultiContent**.
- 3 Select **Next Document**, **Previous Document**, or **Document Number**.
If you selected **Document Number** the **Document Number** dialog box appears.

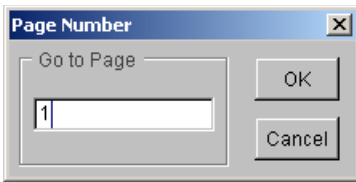


- 4 Enter the number of the Content file and click **OK**.
The Content file whose number you entered displays.

Viewing pages in a multi-page Content file

- 1 Display a file in AutoVue.
- 2 Select **View > Page**.
- 3 Select **Next**, **Previous**, or **Page Number**.

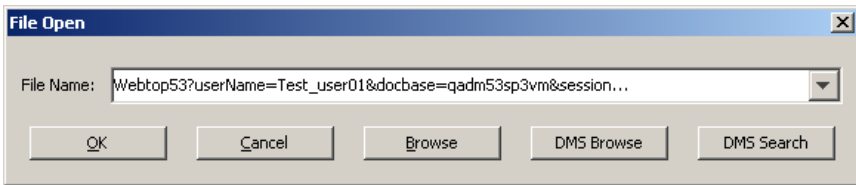
If you selected **Page Number** the **Page Number** dialog box appears.



Accessing DMS files

AutoVue provides two ways to access files that are in the docbase from within the AutoVue window: DMS Browse and DMS 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.



DMS Search

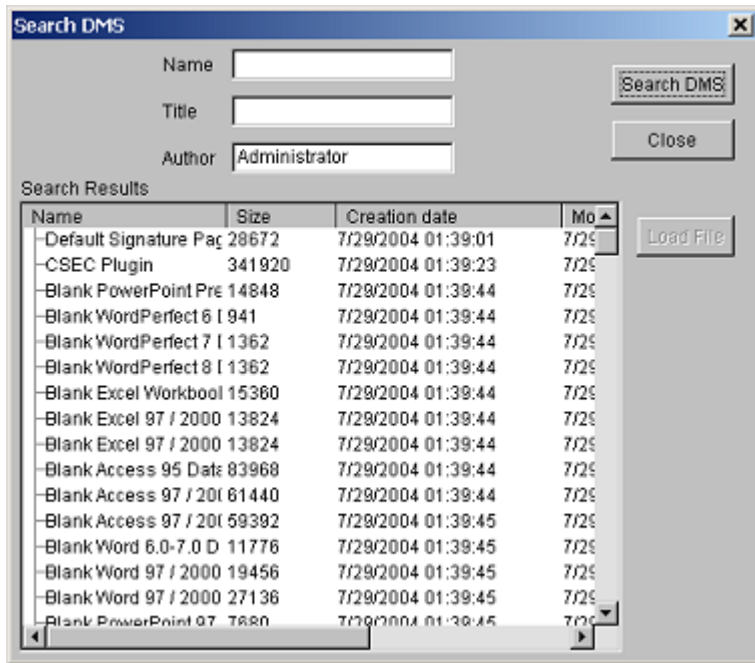
- 1 Click the **DMS Search** button in the File Open dialog box.

A dialog box appears that lets you specify a search criteria.

Name	Size	Creation date	Modifi
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- 2 To search for a file in the DMS, enter the Name, Title and/or Author of the file in the DMS search dialog box.
- 3 When you finish specifying your search criterion, click **Search**.

- 4 AutoVue looks for all documents in the repository that match the search criteria and populates the Search results section with the search results.

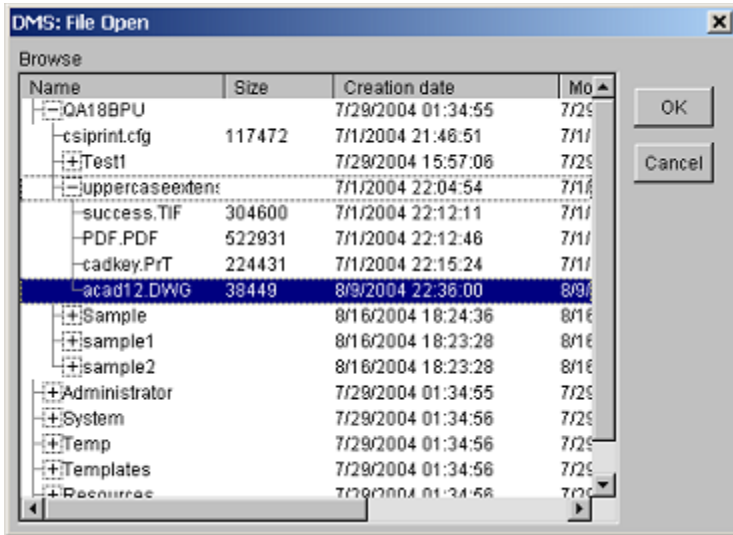


- 5 Select a file from the Search results section and select Load File to display the file in AutoVue.

DMS Browse

- 1 Click the **DMS Browse** button in the **File Open** dialog box.

A dialog box appears that lets you browse through the repository.



- 2 Browse through the repository and click **OK** to select a file.

Markups

The three types of Markup files are normal Markups, consolidated Markups and Master Markups.

Normal or regular Markups: The default Markup when using a brand new setup.

Consolidated Markups: You can load several files simultaneously and edit them to create a consolidated Markup where the contents of all files consolidate to display as one file. This type of Markup is especially helpful when you want to group reviews from various individuals to forward collectively to another person or group of reviewers.

Master Markups: Markup files that display automatically when you open a document. This type of Markup alerts the viewer that important changes were made to the document content. This benefits the workflow cycle when changes to a document need to be noted but the document itself has not been modified in the authoring application.

Creating Markups

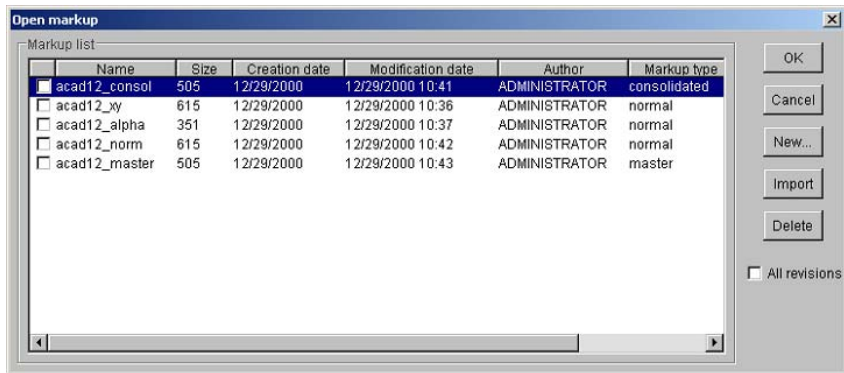
- 1 Display a document within AutoVue. (Refer to the section on Viewing documents.)
- 2 Select **File > Markup** to enter Markup mode.
You can also right-click and select **Markup**, or click the **Markup** button




in the toolbar.

The current active document is displayed in Markup mode, unless there are existing Markups.

If there are existing Markups, the **Open Markup** dialog box appears when you try to enter Markup mode.



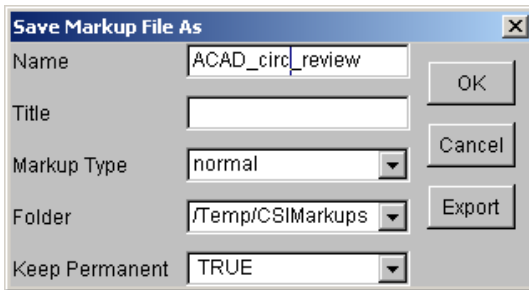
- 3 To create a new Markup file, click **New** in the **Open Markup** dialog box.
The current active document is displayed in Markup mode. You are ready to create Markups.
- 4 If after you have finished creating a Markup you want to create another one, select **File > New**.

You can also click the **New** button  in the toolbar.

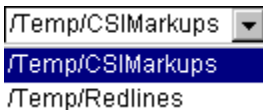
Saving Markups

- 1 Select **File > Save** to open the **Save Markup File As** dialog box.

Note: For existing Markup files, **Save** is enabled only when the Markup file has been modified.





- 2 Enter the Markup **Name**.
- 3 From the drop-down list, select the **Markup Type**.
- 4 From the drop-down list, select the **Folder** where you want the Markup file saved.



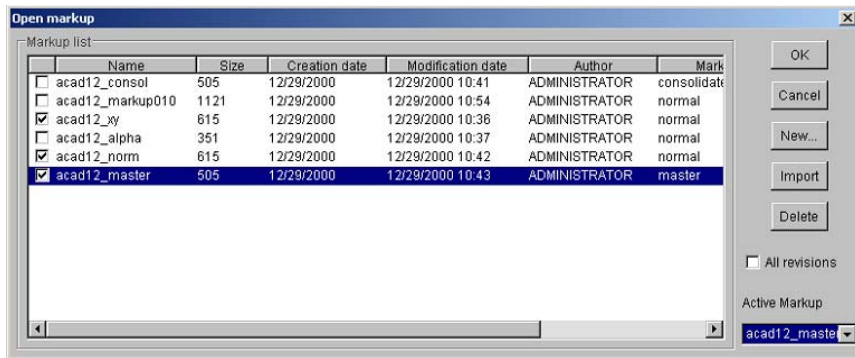
- 5 Set **Keep Permanent** to **TRUE** to automatically promote Markups to newer revisions of the base document.
- 6 Click **OK**.
The Markup file is saved and remains displayed in AutoVue.

Displaying existing Markups

When you are viewing a base file that has one or more Markup files, a red lightbulb button  displays on the AutoVue client status bar.

- 1 Display a base document that you know has Markup files.
- 2 Select **File > Markup** to enter Markup mode.
Alternatively, you can right-click and select **Markup**, or click the **Markup** button  in the toolbar.
The current active document is displayed in Markup mode unless there are existing Markups.

If there are existing Markups, the **Open Markup** dialog box appears.



- 3 From the **Markup list**, select one or more Markup files you want to view.
- 4 From the drop-down list, select the Active Markup.

Note: If you did not select more than one Markup in step 3, the **Active Markup** option does not appear
- 5 Click **OK**.
All the Markups you selected are displayed simultaneously.

Promoting Markups

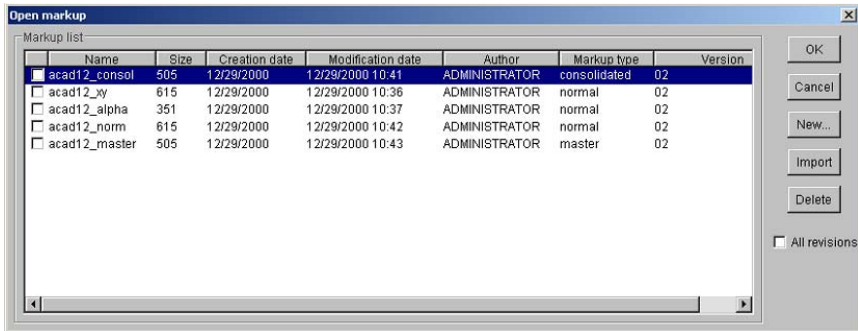
You can promote Markups from an earlier version of a document to the current version. When you promote a Markup, essentially you are saving it as a Markup for the latest version of a document.

- 1 Display a document with AutoVue.
- 2 Select **File > Markup** to enter Markup mode.
You can also right-click and select **Markup**, or click the **Markup** button



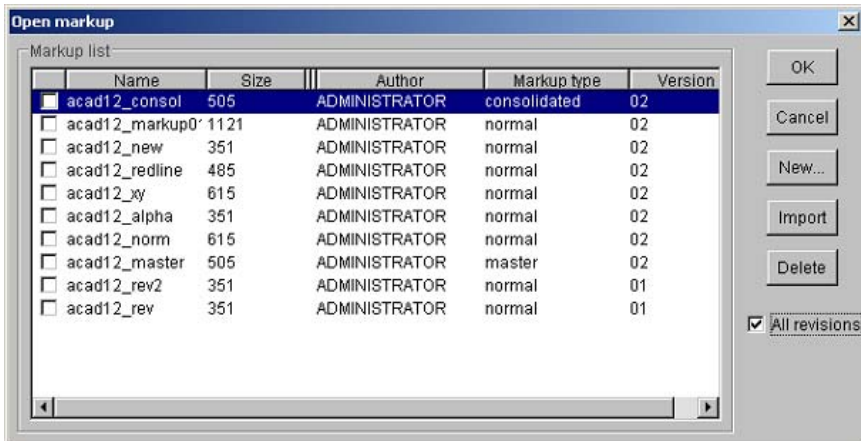
in the toolbar.

The **Open markup** dialog box appears.



- 3 Select **All revisions** to display the Markup files from previous versions of the base file.
(If previous versions of the file has Markups, AutoVue lists all the Markups.)
All the previous Markup files for previous versions of the base file are displayed.

Note: In the following image, some columns were narrowed to show the **Version** column.



- 4 Select the Markup file for the previous version of the base file that you want to promote.
- 5 Click **OK**.
The Markup file is displayed with the latest version of the base file.
- 6 Click **File > Save** to save the Markup as a Markup for the latest version of the base file.
The Markup is saved as the Markup of the latest version of the base file.

Note: Save is only enabled if you have made modifications. To save without modifications, click **Save As**.

Deleting Markups

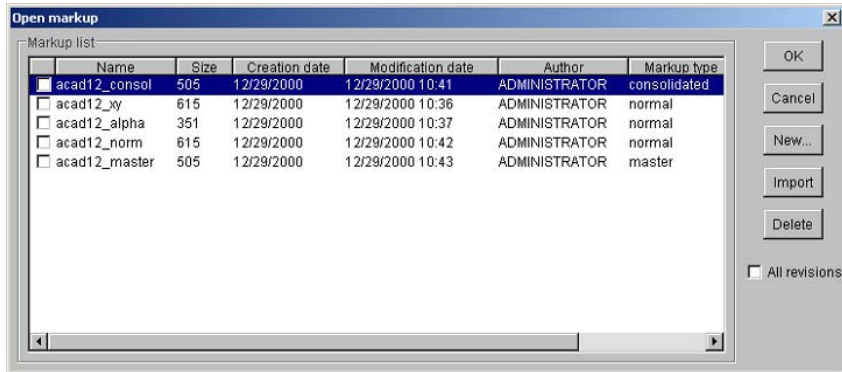
- 1 Display a document with AutoVue.
- 2 Select **File > Markup** to enter Markup mode.
You can also right-click and select **Markup**, or click the **Markup** button



the toolbar.

The **Open markup** dialog box appears.

- 3 From the **Markup list**, select one or more Markup file(s) that you want to delete.

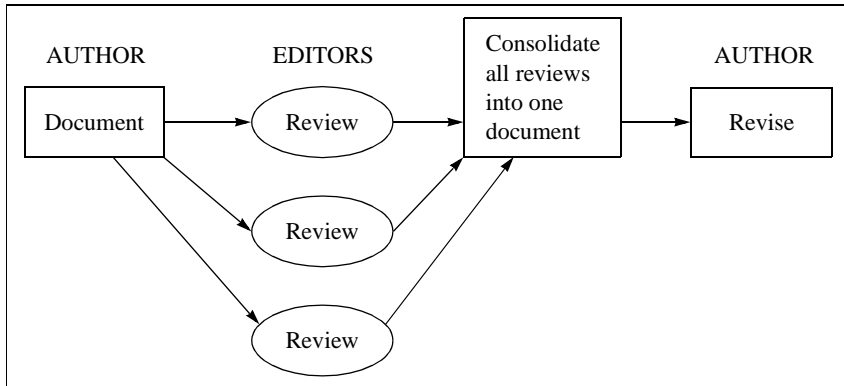



- 4 Click **Delete**.
For each Markup file that you selected to delete, you are prompted to confirm deletion.
- 5 Click **Yes** to delete the Markup.
The selected Markup files are deleted from the **Markup list** in the **Open markup** dialog box.

Consolidating several Markups into a single Markup

The consolidate option allows you to create a new Markup file that combines copies of selected parts, or layers, of different Markup files. It is only available if multiple Markup files have been loaded using the multi-load option. (The multi-load option enables you to open several Markup files at the same time.) During

the review cycle consolidation simplifies document revisions by providing the author with one combined markup file instead of several Markup files.

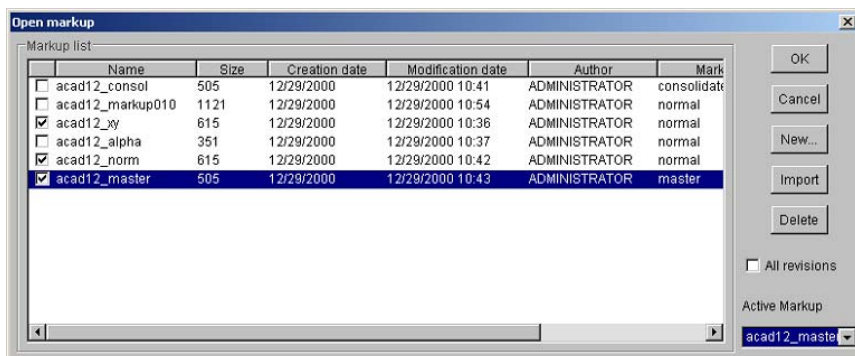


- 1 Display a document with AutoVue.
- 2 Select **File > Markup** to enter Markup mode.
You can also right-click and select **Markup**, or click the **Markup** button  in the toolbar.

The **Open markup** dialog box appears.

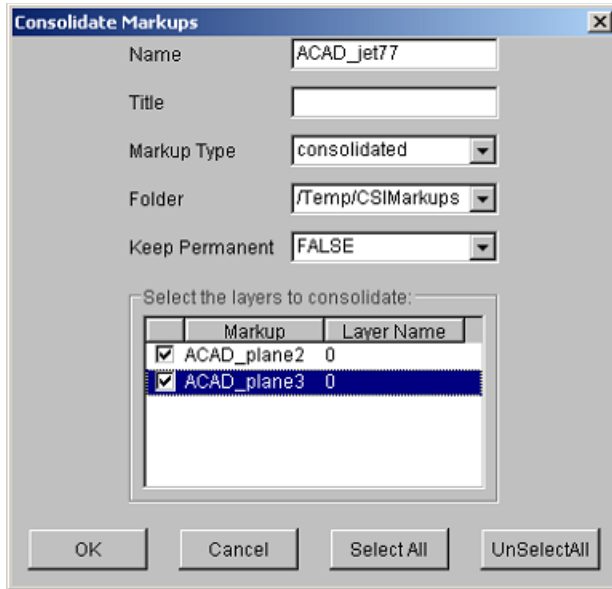
- 3 Select more than one Markup file to view.
- 4 From the drop-down list, select the **Active Markup**.

Note: If you did not select more than one Markup in step 3, the **Active Markup** option does not appear.



- 5 Click **OK**.
All the Markup files you selected are simultaneously displayed.
- 6 Select **File > Consolidate**.

The **Consolidated Markups** dialog box appears.



- 7 Select the Markup layers you want to consolidate.
- 8 Enter a **Name** for the consolidated Markup file.
- 9 Click **OK**.

The consolidated Markup file is saved.

Saving as Master Markup

Master Markups are instantly 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 are not able to change them or create Markups based on Master Markups.

After you have finished marking up a document, complete these steps to save a newly created Markup file as a Master Markup.

- 1 In AutoVue, select **File > Save or Save As**.

The **Save Markup File As** dialog box appears.

- 2 Enter the Markup **Name**.
- 3 For **Markup Type**, select **master** from the drop-down list.

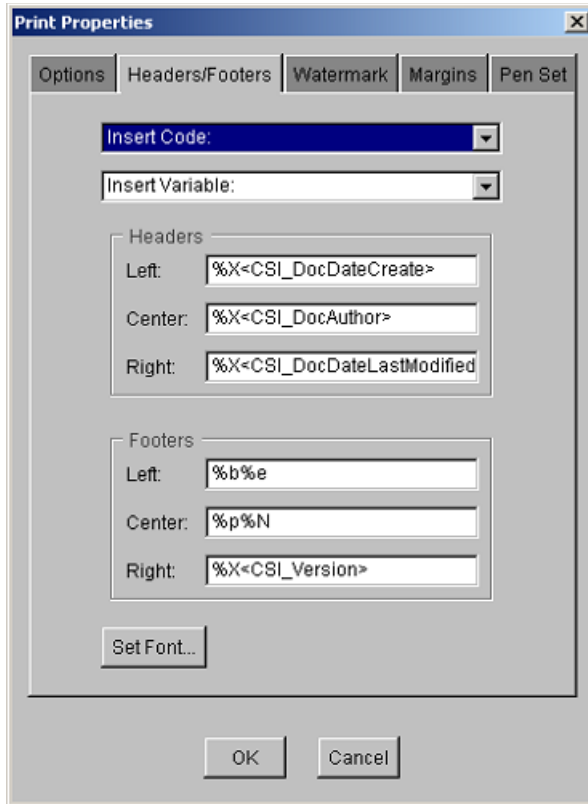
- 4 Click **OK**.
The Master Markup file is created and stored in the Markups database.
The next time a user logs on and views this file, AutoVue will launch in Markup mode and display the Master Markups.

Printing document attributes as headers, footers or watermarks

With AutoVue you can print document business object attributes in a header, footer or as a watermark.

- 1 In AutoVue, select **File > Print**.
The **Print Properties** dialog box appears.

- 2 Customize the Print Properties by taking the steps in sections [Printing in headers and footers](#) and [Printing as a watermark](#).

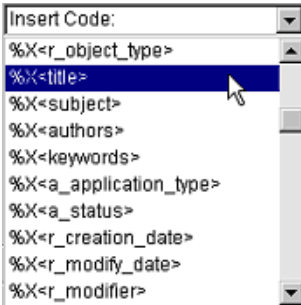


Printing in headers and footers

With the headers/footers group you can define what will be included on every page of your document.

- 1 In the **Print Properties** dialog box, click the **Headers/Footers** tab.
- 2 To input information for the headers and footers, enter text under **Headers** and under **Footers**.
You can also select a code in the **Insert Code** drop-down list.

- 3 Click **OK** when you are done.

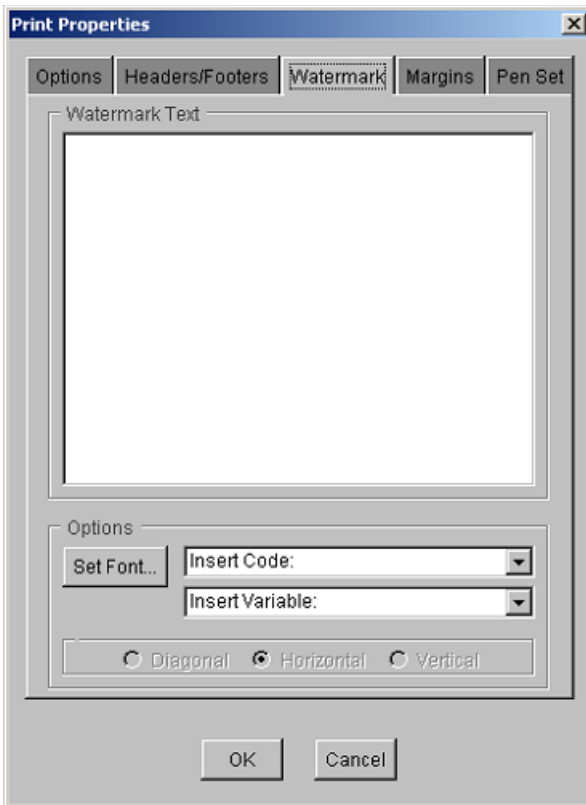


Printing as a watermark

A watermark prints faint and transparent characters “under” the current document's content. With the Watermark group, you can define what you want to appear on your printed document.

- 1 In the **Print Properties** dialog box, click the **Watermark** tab.
- 2 Enter text under **Watermark Text**.

The text displays as it will appear in the document.



- 3 Click **Font** to customize the font.
- 4 Click **OK** when you are done.

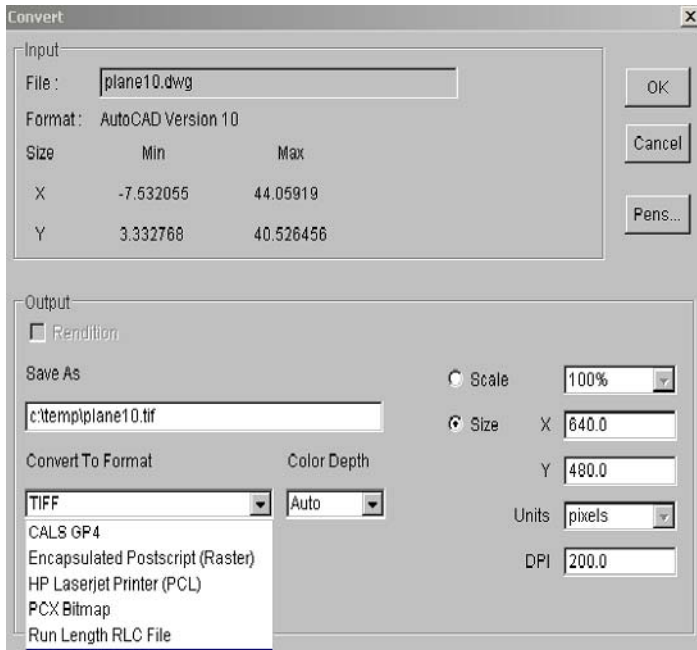
Converting a document to another format

You can use AutoVue to convert documents to other formats such as TIFF and then check in the converted document back into Documentum as a rendition of the original.

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

- 1 Display a document with AutoVue.
- 2 Select **File > Convert**.

The **Convert** dialog box appears.



- 3 From the **Convert to Format** drop-down list, select the TIFF format.
- 4 Check the **Rendition** option under **Output**.
- 5 Modify any other options if you need to.
- 6 Click **OK**.

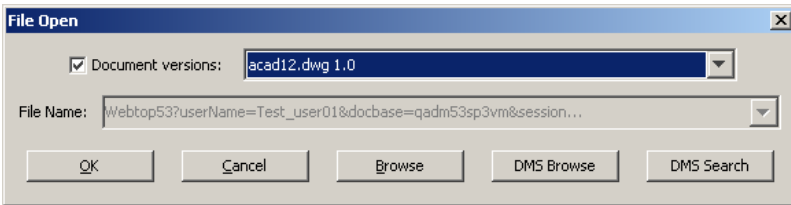
File conversion begins. AutoVue converts the file to the TIFF format and checks it into Documentum as a rendition of the original file.

Comparing files

You can use AutoVue to compare the current version of a document with any of its past versions.

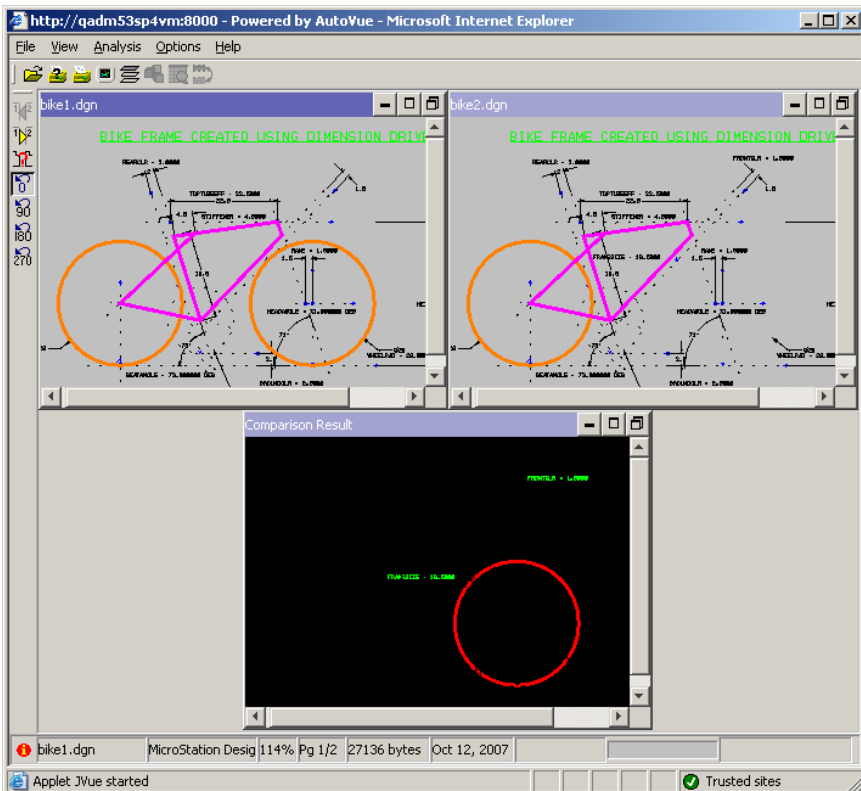
- 1 Display a document with AutoVue.
- 2 Select **File > Compare**.

The **File Open** dialog box appears.



- From the **Document Versions** drop-down list, select the version to which you want to compare the file viewed in step 1.

AutoVue displays three windows, the first containing the original document viewed in step 1, the second containing the version you compared the original against, and the third the comparison result window.



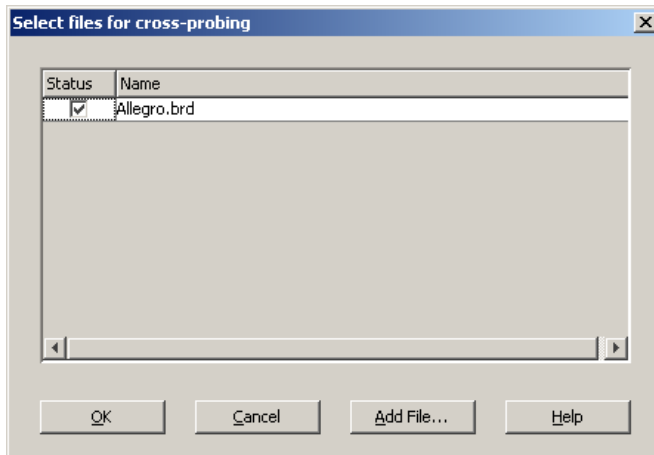
Note: The comparison result window uses color to communicate the result of the file comparison:

- **Green** is for additions.
- **Red** is for deletions.
- **Blue** is for no change.

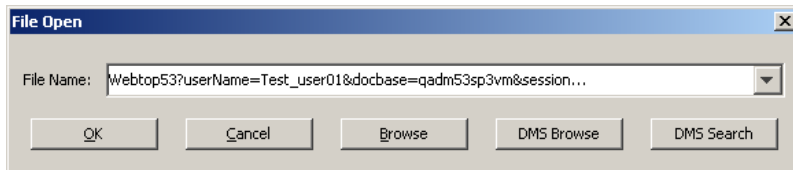
Cross Probing

AutoVue lets you specify files saved in the docbase for crossprobing.

- 1 Display a document with AutoVue.
- 2 Select **File > Cross Probe**.
- 3 In the **Cross Probe** dialog box that appears, select **Add File**.



The **File Open** dialog box opens



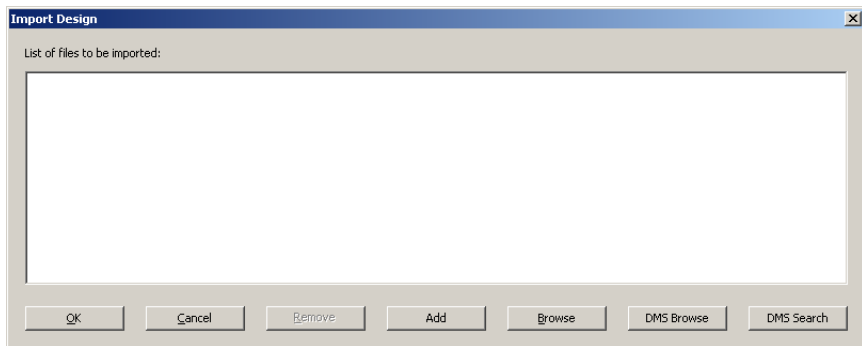
- 4 Click **Browse** to select a local file. Browse through the local file system and select a file.
- 5 Click **DMS Browse** to select a file from the docbase. Browse through the DMS and select a file. See [Accessing DMS files](#) for more information regarding DMS Browse.

- 6 Click **DMS Search** to search the docbase for a file. Select a file from the search results. See [Accessing DMS files](#) for more information regarding DMS Browse.
- 7 To specify a URL, type the URL in the **File Name** field.
- 8 Click **OK** when you finish selecting a file.

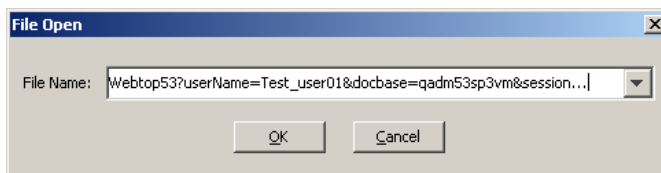
MockUp

With AutoVue, it is possible to import 3D files from Docbase into the current AutoVue window.

- 1 Display a 3D document in AutoVue.
- 2 Select **File > MockUp**.
- 3 The **Import Design** dialog box appears.



- 4 To specify a URL:
 - a. Click **Add** in the Import Design dialog box.
 - b. In the **File Open** dialog box that appears, type the URL in the **File Name** field, then click **OK**.



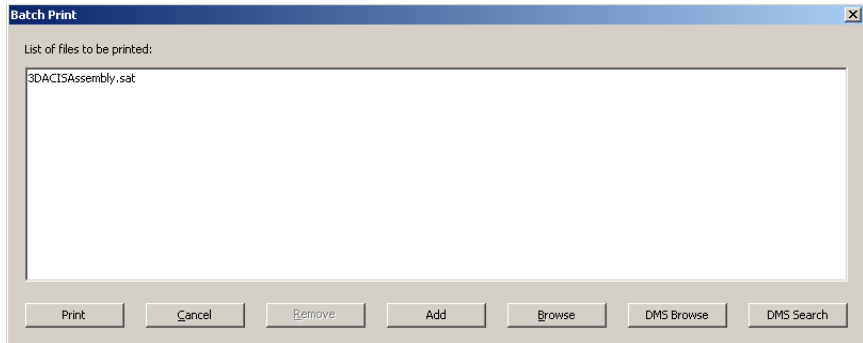
- 5 Click **Browse** in the Import Design dialog box to select a local file. Browse through the local file system and select a file.
- 6 Click **DMS Browse** in the Import Design dialog box to select a file from the Docbase. Browse through the DMS and select a file. See [Accessing DMS files](#) for more information regarding DMS Browse.

- 7 Click **DMS Search** in the Import Design dialog box to search the docbase for a file. Select a file from the search results. See [Accessing DMS files](#) for more information regarding DMS Browse.
- 8 Click **OK** when you finish selecting a file.

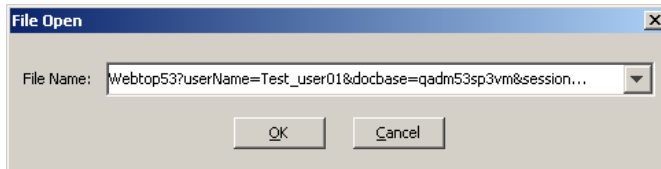
Batch Print

You can use AutoVue to print a set of files simultaneously instead of printing one at a time.

- 1 Display a document in AutoVue.
- 2 Select **File > Batch Print**.
The **Batch Print** dialog box appears.



- 3 To specify a URL:
 - a. Click **Add** in the Batch Print dialog box.
 - b. In the **File Open** dialog box that appears, type the URL in the **File Name** field, then click **OK**.



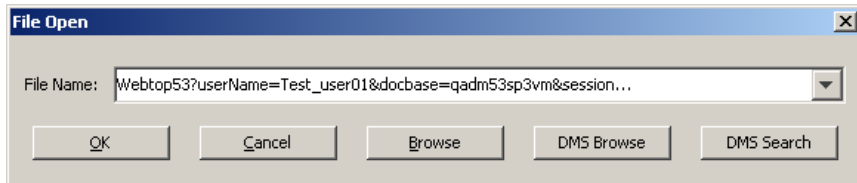
- 4 Click **Browse** in the Batch Print dialog box to add a file from the local file system. In the **File Open** dialog box that appears select the file you want to add to the print list.
- 5 Click **DMS Browse** in the Batch Print dialog box to browse through the repository. In the dialog box that appears, browse through the repository and click **OK** to select a file.
Note: See [Accessing DMS files](#) for more information.
- 6 Click **DMS Search** in the Batch Print dialog box to search through the DMS. In the **Search** dialog box that appears, specify a search criteria and select the file from the search results to add it to the print list
Note: See [Accessing DMS files](#) for more information.

- 7 When you finish selecting files, click **Print**. The selected files are printed.

File Overlays

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

- 1 Select **File > Overlay**.
The **File Open** dialog box appears.



- 2 Click **Browse** to select a local file. Browse through the local file system and select a file.
- 3 Click **DMS Browse** to select a file from the Docbase.
The DMS Browse dialog box appears. Browse through the DMS and select a file.
- 4 Click **DMS Search** to search through the docbase. Specify a search criteria and select a file from the Search Results.
- 5 Type the URL in the **File Name** field to specify a URL.
- 6 Click **OK** after you select a file.

Feedback

Oracle products are designed according to your needs. We would appreciate your feedback, comments or suggestions. Contact us by fax, e-mail or telephone. There is a feedback button on our Web site that activates an easy-to-use feedback form. Please let us know what you think!

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