VueLink for Oracle UCM User's Manual

Release 19.2 E12171-01

An Integration between AutoVue Web Edition and Oracle Universal Content Management Server

VueLink for Oracle UCM User Manual

E12171-01

Copyright © 2008, Oracle and/or its affiliates. All rights reserved.

The Programs (which include both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose. If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software-Restricted Rights (June 1987). Oracle Corporation, 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy, and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

Contents

INTRODUCTION	5
Functional Overview	5
Why does the UCM User Need a Viewing and Markup Tool?	7
Markup File Management	8
Other Useful Features	8
VIEWING DOCUMENTS	9
Viewing from the Search Results Page	11
Viewing from the Content Information Page	12
Viewing a Revision	14
MANAGING MARKUP FILES	15
Creating Markups	15
Saving Markups	16
Saving a new Markup file	16
Saving an existing Markup file	16
Displaying Existing Markups	17
Promoting Markups	17
Deleting Markups	18
PRINTING HEADERS, FOOTERS,	
AND WATERMARKS	20
Headers/Footers Group	21
Watermarks Group	21
FILE COMPARE	22
APPENDIX	25
Creating XRefs Based on CAD Folio Template	25
Linking Master File to Folio	34
FEEDBACK	39
General Inquiries	39
Sales Inquiries	39
Customer Support	39

Introduction

VueLink for Oracle UCM provides an interface between the Oracle Universal Content Management (UCM) server and AutoVue Web Edition. 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 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.

Throughout this manual the Autovue family of products is referred to as AutoVue. These products include AutoVue Office, AutoVue 2D Professional, AutoVue 3D Professional Advanced, AutoVue EDA Professional, and AutoVue Electro-Mechanical Professional.

Refer to the AutoVue documentation for information about the specific features and file formats supported by each AutoVue product.

Functional Overview

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, 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.

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 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.

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 **Red Light** button is displayed 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

🤗 Guest Home Page - Windows Internet Explorer	
🚱 🗣 🖻 http://effeltower/idc/ 🛛 😽 🗙 Google	•
File Edit View Favorites Tools Help	
😪 🎄 🗖 Guest Home Page 👘 🚺 🔹 🗟 🔹 📾 🔹 🔂 Page 🔹 🎯 Tools 👻 🔞	»
ORACLE [®] Welcome to Content Server	~
FULL ACCESS	
Log in to use the content server with your full access privileges	
Login	
Use the navigation items below to access public content only.	
Search	
Home	
Library	
Search	
[Login] [Home] [Likran/] [Search]	
[Loqin][nome][Liorary][Search]	
	\checkmark
Succel intranet 🔍 100%	•

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

The Search page appears.

🖉 Home Page for sysadmin - Windows Internet Explorer		
Google - 🖸 http://effeltower/idc/idcplg?IdcService= 🛛 🐓 🗙 Google	÷	P -
File Edit View Favorites Tools Help		
🛠 💠 🗖 Home Page for sysadmin	🕶 💮 Tools 👻 🔞	• »
ORACLE' Content Server 🛛	Quick Search	
Home Search New Check In My Profile Help		
▼ My Content Server ▼ Browse Content ▼ Content Management ▼ Admir	nistration	
Search		
Title		
Content ID		
Release Date: From To]	
	_	
Sort By: Release Date 💌 Descending 💌 Search		
		\sim
Done 🧐 Local intranet	🔍 100	% •

3 Enter the Title, Content ID, or Release Date 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** E. From the menu that appears, select **View in AutoVue.**

🖉 Search Resu	lts - Windows Intern	et Explorer				×
()) - ()	http://effeltower/idc/idc	plg?IdcService=GET_SEARCH_RESULTS&QueryTe> 💙 🗲	, x G	oogle	<u>م</u>	•
File Edit Vie	File Edit View Favorites Tools Help					
🚖 🏟 🗖 Se	earch Results		N •	🚽 🔹 🔂 Page 🕶 🎯	Tools 🕶 🕜 🕶	»
ORACLE	Content Server			Q	uick Search	^
Home Sea	rch New Check In	My Profile Help				
✓ My Content 5	Gerver 👻 Browse Co	ntent 🔷 Content Management 🔷 Administrati	ion			
Search Rec	ults Items 21-40 of	e0				
Sedicitikes	arts items 21-40 or			Change View 🛛 🔻 Q	uery Actions	
		😧 Page 2 🕶 of 3 🕒				
▼ Actions						
	ID	Title	Date	Author	Actions	
	000183	BOARD.ipt	1/31/	Content Informat	on 🛅 🛈	
	000182	ARROW.ipt	1/31/	Check Out	i	
	000181	ilearn_asm.iam	1/31/	Check In Similar	1	
	000176	word	1/30/	Send link by e-ma	ail 🔳 🛈	
	000178	testt	1/29/0	8 sysadmin	t) • 🗉 🛈	
	000177	vue.jsp	1/28/0	8 sysadmin	1	
	000175	pdf	1/25/0	8 sysadmin	1	
	000174	folio without master file	1/25/0	8 sysadmin	1 🗐 🚍	
	000173	Folio 7 Main	1/25/0	8 sysadmin	1 🗊 🚍	
	000168	Folio 5 main.dwg	1/23/0	8 sysadmin	1 🗊 🚍	
	000167	Folio 4 main.dwg	1/22/0	8 sysadmin	1 🗐	
	000165	Folio 3 Main.dwg	1/21/0	8 sysadmin	1 🗊 🚍	
	000164	MY MAIN.DWG FOLIO	1/18/0	18 sysadmin	1 🗊 🚍	~
				Local intranet	🔍 100% 🔹	

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

Note: It is important to note the following:

• A **Red Light** button indicates that one or more Markup files are associated with the current document.

- A **Resource** button **1** 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 from the Content Information Page

1 To the right of the document you want to view, under the Actions column, click **Info** (1).

The Content Information page appears.

Content Information for 'bik	e - view from version and comp	are' - Windows Internet Explorer				
😋 🕤 👻 🖸 http://effeltower/	idc/idcplg?IdcService=DOC_INF0&dID=1	4 🕶 😽 🗙 Google	P -			
File Edit View Favorites To	ools Help					
🚖 🏟 🦲 Content Information for 'bike - view from version 🦳 📩 🐂 🔊 🖓 🗮 🐑 🖓 Page 🔹 🎯 Tools 🔹 🔞 🔹						
ORACLE [®] Content Ser	ver		Quick Search			
Home Search New Chec	k In My Profile Help					
▼ My Content Server ▼ Brows	se Content 🛛 👻 Content Manageme	ent - Administration				
Content Information						
		✓ Content Action	is 🔻 E-mail			
Conter	nt ID: 000074					
Revi	ision: 3					
1	Type: ADACCT - Acme Accounting [Department				
	Title: bike - view from version and o	compare				
Au	thor: sysadmin					
Comm	ents: Only: FALSE					
apxInibitMetadataUp	date: FALSE					
apxTrashDeleteOldN	ame:					
apxTrashDeleteLoca	ation: 0					
apxFo	older: 0					
apxTrashDel	leter:					
apxHic	Iden: FALSE					
Markup_Base	edID:					
Security G	roup: Public					
Checked Ou	ıt By:					
Status: Released						
Formats: Application/dgn						
Linke						
LIIKS						
Web Location: ht	tp://effeltower/idc/groups/public/docu	ments/adacct/000074.dqn				
Native File: bi	<u>ke2.dqn</u>					
Folio Membership Show						
Archived Folio Membership Show						
Archived Folio Hembership Show						
Revision Release	Date Expiration Dat	e Status	Actions			
[3] 1/10/08 12:29 P	M None	Released	Delete			
2 12/18/07 3:16 P	M None	Released	Delete			
1 12/18/07 3:15 P	M None	Released	Delete			
			~			
http://effeltower/idc/idcplg?IdcService=	GET_DOC_PAGE&Action=	🧐 Local intranet	🔍 100% 🔹 💡			

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.**

Managing Markup Files

Creating Markups

- 1 Open a document in AutoVue.
- 2 From the **File** menu, select **Markup** to enter Markup mode. Alternately, right-click the workspace and select **Markup**.

Note: From the toolbar, you can also click 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 NEY.

3 If there are exiting markups, from the status bar, click the **Red Light** button2 If the Markup Files dialog box appears.

🛎 M	arkup Files			×
Sel	ect Markup File(s)			OK
	Name	Author	Revision	Cancel
	review1	sysadmin	2	
	review2	sysadmin	2	New
				Import
				Delete
<	Ш		>	All revisions

4 Click New.

Saving Markups

Saving a new Markup file

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

🍰 Sav	e Markup File As	×
		ОК
Name	review3	Cancel
		Export

- 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 File 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 **File** menu, select **Markup** to enter Markup mode. Alternately, right-click the workspace and select **Markup**.

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

2 From the **File** menu, select **Open**. The Markup Files dialog box appears.

4	Ma	rkup File			×
ſ	Sele	ct Markup File(s)			ОК
		Name	Author	Revision	Capcel
	 Image: A start of the start of	review2	sysadmin	3	Cancor
		review1	sysadmin	3	New
					Import Delete
					All revisions
					Active Markup
l	<			>	review2 💌

- 3 To view a Markup file or files, select their respective check boxes.
- 4 If multiple Markup files are selected, select the active Markup file from the Active Markup list.
- 5 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:

 From the File menu, select Markup to enter Markup mode. Alternately, right-click the workspace and select Markup. The Markup Files dialog box appears.

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

2 From the **File** menu, select **Open**. The Markup Files dialog box appears.

4	Ma	rkup Files			
ſ	Sele	ct Markup File(s)			ОК
		Name	Author	Revision	Capcal
		review3	sysadmin	2	
		review1	sysadmin	2	New
		review2	sysadmin	2	
		lkjh	sysadmin	1	Import
		awefasd	sysadmin	1	
					Delete
					All revisions
	<			>	

- 3 Select the **All Revisions** check box. The Markup files from previous versions of the base files appear in the list.
- 4 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.
- 5 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:

 From the File menu, select Markup to enter Markup mode. Alternately, right-click the workspace and select Markup. The Markup Files dialog box appears.

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

- 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.

JVue	×
Delete "review3" markup file ?	
Yes No	

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.

With AutoVue and 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:

Print Properties	×
Options Headers/Foo	ters Watermark Margins Pen Settings
Inser	t Code:
%X<1	Is Web Format >
%X<\	Workflow State>
%X<0	Comments> 45 💻
%X <e< th=""><th>Extension></th></e<>	Extension>
^{%X<1}	-lie Name>
Cent	er %X <release date=""></release>
Righ	t: %X <file name=""></file>
Foo	oters
Left:	%X <publish state=""></publish>
Cent	er %X <created date=""></created>
Righ	t: %X <status></status>
Sel	t Font
Al	lign To Margins
Partial Preview	OK Cancel Help

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.

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 the 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 box appears.

File Open]
🔽 Docume	ent versions:	bike - view from version and compare - Ver.3	l
		bike - view from version and compare - Ver.3	N
File Name:	bike2.dgn	bike - view from version and compare - Ver.1]
		OK Cancel Browse	J

- 2 Select a version from the Document Versions list.
- 3 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.

4 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.



Use the following table to interpret the comparison results:

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

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.

🖉 Home Page for sysadmin - Windows Internet Explorer	
🚱 🕤 🔻 🖸 http://effeltower/idc/idcplg?IdcService= 🔽 🚱 🗙 Google	· •
File Edit View Favorites Tools Help	
🙀 🏟 🦲 Home Page for sysadmin 👘 🖓 🔹 🔝 🔹 🖶 🔹 Page 🤜	🎯 Tools 🔻 🕢 🎽
ORACLE' Content Server 🔁	Quick Search
Home Search New Check In My Profile Help	
▼ My Content Server ▼ Browse Content ▼ Content Management ▼ Admini	stration
Search	
Title	
Content ID	
Release Date: From To	
Sort By: Release Date 💙 Descending 💙 Search	•
Done Social intranet	🔍 100% 🔻 🛒

4 Click Search.

C Search Results	- Windows Intern	et Explorer				
🚱 🗸 🗖 hi	http://effeltower/idc/idc	plg?IdcService=GET_SEARCH_RESULTS&QueryTe> 😪	67 🗙 G	ogle		P -
File Edit View	Favorites Tools	Help				
🚖 🏟 🖸 Searc	th Results			🖣 🔹 🔂 Page 👻 🍈	Tools 👻 🔞 🗸	»
	Content Server	→ 8		Q	uick Search	
Home Search	New Check In	My Profile Help				
▼ My Content Serv	ver 🛛 🔻 Browse Co	ntent 🔹 Content Management 👻 Administra	tion			
Search Result	ts Items 21-40 of (50				
			▼C	hange View 🛛 🔻 Q	uery Actions	
		€ Page 2 v of 3 €				
▼ Actions						
	ID	Title	Date	Author	Actions	
0	000183	BOARD.ipt	1/31/	Content Informati	on 📒 🛈	_
□ 0	000182	ARROW.ipt	1/31/	Check Out	i	
0	000181	ilearn_asm.iam	1/31/	Check In Similar	1	
□ 0	000176	word	1/30/	Send link by e-ma	ail 🗉 🛈	
0	000178	testt	1/29/08	8 sysadmin		
□ 0	000177	vue.jsp	1/28/08	B sysadmin	1	
0	000175	pdf	1/25/08	B sysadmin	1	
0	000174	folio without master file	1/25/08	B sysadmin	1 🗊	
0	000173	Folio 7 Main	1/25/08	B sysadmin	1 🗊	
0	000168	Folio 5 main.dwg	1/23/08	8 sysadmin	1 🗊	
0	000167	Folio 4 main.dwg	1/22/08	8 sysadmin	1 🗊	-
0	000165	Folio 3 Main.dwg	1/21/08	B sysadmin	1 🗐	
0	000164	MY MAIN.DWG FOLIO	1/18/08	8 sysadmin	1 🗐	~
			- - 	ocal intranet	a 100%	•

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.

🥙 Search Results - Windows Internet Explorer						
🚱 🕤 🔻 📴 http://effettower/idc/idcplg?IdcService=GET_SEARCH_RESULTS&QueryText=&SortField=dInDate 💌 🚱 🗙 Google 🖉 🖓						
File Edit Viev	w Favorites Tools	Help				
🚖 🏟 🖸 Sea	arch Results		S - 🖶 •	🔂 Page 👻 🍏	Tools 🕶 🔞 🕶	»
▼ Actions						^
Add to active	e Content Basket	Title	<u>Date</u>	Author	Actions	
Add items to	folio	BOARD.ipt	1/31/08	sysadmin	1	
	000182	ARROW.ipt	1/31/08	sysadmin	1	
	000181	ilearn_asm.iam	1/31/08	sysadmin	1	
	000176	word	1/30/08	sysadmin	1	
	000178	testt	1/29/08	sysadmin	1	
	000177	vue.jsp	1/28/08	sysadmin	1	
	000175	pdf	1/25/08	sysadmin	1	-
	000174	folio without master file	1/25/08	sysadmin	🍋 🛈 🕽	
	000173	Folio 7 Main	1/25/08	sysadmin	1 🔁 🗊	
	000168	Folio 5 main.dwg	1/23/08	sysadmin	1 🗐	
	000167	Folio 4 main.dwg	1/22/08	sysadmin	1 🗊	
	000165	Folio 3 Main.dwg	1/21/08	sysadmin	1 🗐	
	000164	MY MAIN.DWG FOLIO	1/18/08	sysadmin	1 🗊	
	000163	Folio 2 main.dwg	1/18/08	sysadmin	1 🗊	
	000160	Folio main.dwg	1/17/08	sysadmin	1 🗊	
v	000155	xref-1.dwg	1/17/08	sysadmin	1	
V	000157	xref-3.dwg	1/17/08	sysadmin	1	
v	000156	xref-2.dwg	1/17/08	sysadmin	1	
~	000158	xref-4.dwg	1/17/08	sysadmin	1	
✓	000154	main.dwg	1/17/08	sysadmin	1	~
			Second Second	ntranet	a 100%	•

6 From the **Actions** menu, select **Add items to folio.** The Add Item To Folio dialog box appears.

🤌 http://effeltower/idc/idcplg?ldcService=GET_DOC_PAGE&Action=GetTemplatePa 🔳 🗖	X
	<u>^</u>
Add Items To Folio	
You can either put the selected items into an existing folio, or create a new folio.	
Next >	
New folio	
C Existing folio	
	\sim

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

http://effeltower/idc/idcplg?ldcService=GET_DOC_PAGE&Action=GetTemplatePa	
	J
Pick Folio Type	
A Simple Folio is a flat, unstructured container for collecting content items. The Advanced Folio option provides additional functionality and allows the collection space to be organized into a folder-like hierarchy. The structure of an Advanced Folio can be user-defined, or based upon a pre-defined template.	
Back Load folio	
🔘 Simple Folio	
Advanced Folio Advanced Advanced	
Folio Template: Folio Template for CAD with XRefs 👻	
×	

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.

http://effeltower/idc/idcplg?ldcService=LOAD_NEW_TEMPLATE_FOLIO&templat	teName=000215&item_0=212, - Windows Inter 🔳 🗖 🔀
COO - Ohttp://effeltower/idc/idcplg?IdcService=LOAD_NEW_TEMPLATE_FOLIO&templateNa	ame=0002158 💙 🗲 🗙 Google
File Edit View Favorites Tools Help	
* * Dhttp://effeltower/idc/idcplg?IdcService=LOAD_NEW	🏠 👻 🔝 🝸 🖶 👻 Page 🗸 🎯 Tools 👻 🚱 👻 🂙
ORACLE' Content Server	Duick Search
Home Search New Check In My Profile Help	
▼ My Content Server ▼ Browse Content ▼ Content Management ▼ Administratio	n
Edit Folio	and at least
	duck help ▼Actions
	▼ Element Info
CAD Folio Root	
	▼ Source Items 📲
	Search Clear
	Collected Items
	(j) xref-1.dwg
	(i) xref-3.dwg
	(i) xref-2.dwg
	U xrer-4.dwg
	×
Done	Succal intranet 🔍 100% 👻 🛒

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.

http://effeltower/idc/idcplg?ldcService=LOAD_NEW_TEMPLATE_FOLIO&template	Name=000215&item_0=212, - Windows Inter 🔳 🗖 🔀
COO - Ohttp://effeltower/idc/idcplg?IdcService=LOAD_NEW_TEMPLATE_FOLIO&templateNam	ne=0002158 💙 🗲 🗙 Google
File Edit View Favorites Tools Help	
🛠 🐼 🗖 http://effeltower/idc/idcpig?IdcService=LOAD_NEW	🏠 🔹 🔂 🔹 🖶 🔹 🔂 Page 🗸 🎯 Tools 👻 🌒 🔹 👋
	Description of the search Contract of the sea
Home Search New Check In My Profile Help	
▼ My Content Server ▼ Browse Content ▼ Content Management ▼ Administration	
Edit Folio	quick help ▼Actions
	▼ Element Info /Ⅲ
CD Folio Root	CAD Folio Root CAD Folio Root Description: Templas for CAD with XRefs Attributes:
	▼ Source Items (E) Search Clear Collected Items (a) xref-1.dwg (a) xref-3.dwg (b) xref-2.dwg (c) xref-4.dwg (c) main.dwg
Done	🖌 😌 Local intranet 🔍 100% 👻 🏢

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.

Cocie	P -
File Edit View Favorites Tools Help	
🛊 🏟 🖸 http://effekower/idc/idcplg?IdcService=LOAD_NEW	»
ORACLE' Content Server 20 Quick Search	-
Home Search New Check In My Profile Help	
My Content Server Frowse Content Content Management Administration	
Edit Folio quick hel Vursaved Changes	
● Element Info '	
CAD Folio Root Insert XRefs Insert XRefs	
Done 😪 Local intranet 🛞 100%	•

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

	▼ Actions
▼ Element Info	Save folio
undefined(Empty)	
Name:	
Description:	=
undefined slot	
Content id: 000158	
Create date:	~

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

🖉 Content Che	ck In Form - Windows Internet Explorer	
ORACLE		
Set Folio Pr	ofile	
Select a conten	t profile to be applied to the new folio, or leave set to 'none' to check in without a profile.	
	Next >	
Profile:	None	
		~

14 Click Next.

The Folio Check In page appears.

🖉 Content Check I	n Form - Windows Internet Explorer	
ORACLE		<u>^</u>
Folio Check In Use the form below t	to check the folio into the Content Server.	—
Туре	ADENG - Acme Engineering Department	^
Title	Folio for Main.dwg	
Author	sysadmin sysadmin 🗸	
Security Group	Secure	
Content ID		
Revision	1	=
Comments		
Markup_BasedID		
Release Date	2/20/08 4:14 PM	
Expiration Date		
	Reset	
		~ ~

- 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.

http://w2k3oucm103/idc/idcplg?ldcService=CHECKIN_FOLIO_CONFIRM&dID=59	×
ORACLE	
Folio Check In Confirmation	
The following folio has been successfully checked into Content Server. Select a navigation option below and click Finish.	
(Finish >)	
Content ID: 000054 Title: Folio for Main.dwg	
Title: sysadmin	
Continue editing the folio	
View content information for the folio	
View the folio	
	~

18 Click Finish.

View the newly created Folio in AutoVue.

For our example, the AutoCAD design displays as in the following image. Note that annotations are for illustrative purposes only and are used to identify XRefs.



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** (1).

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*.

Content l	Information for 'folio for acterna' - Window	vs Internet Explorer	
() -	http://w2k3oucm103/idc/idcplg?IdcService=DOC	_INFO&d <mark>(D=15</mark> &dDocName=000012	
File Edit	View Favorites Tools Help		
* * 🕻	Content Information for 'folio for acterna'		
ORACLE [®] Content Server			
Home Sea	earch New Check In My Profile Help		
Home Sea	earch New Check In My Profile Help nt Server V Browse Content V Content Managem	ent v Administration	

- 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** (1). The Content Information Page appears.
- 6 From the **Content Actions** menu, select **Update.**

The Info Update Form page appears.

🖉 Info Update Form for 'acterna proe base' - Windows Internet Explorer	×
🚱 🕤 🔻 🖻 http://w2k3oucm103/idc/idcplg?IdcService=GET_UPDATE_FOI 🗹 🐓 🗙 Google	•
File Edit View Favorites Tools Help	
🚖 🏟 🧧 Info Update Form for 'acterna proe base'	»
	^
VMy Content Server VBrowse Content V Content Management VAdministration	
Info Update Form for 'acterna proe base'	
Content ID 000010	
Type ADACCT - Acme Accounting Department	
Title acterna proe base	
Author sysadmin v	
Security Group Public	
Revision 2	
Comments	
M	
Folio_dID 15	
Markup_BasedID 0	
Release Date 3/5/08 4:00 PM	
Expiration Date	
Submit Update Reset Quick Help	~
Done 😌 Local intranet 🔍 100% 👻	

- 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.

🖉 Content Information for 'acterna proe base' - Windows Internet Explorer	×
🚱 🕞 🔻 🗖 http://w2k3oucm103/idc/idcplg?IdcService=DOC_INF0&dID= 🕶 😚 🗙 Google	•
File Edit View Favorites Tools Help	
😪 🏟 🔁 Content Information for 'acterna proe base'	»
ORACLE Content Server 20 Quick Search	^
Home Search New Check In My Profile Help	
✓ My Content Server ✓ Browse Content ✓ Content Management ✓ Administration	
Content Information	
∨ Content Actions ∨ E-mail	
Content ID: 000010	
Revision: 2	
Type: ADACCT - Acme Accounting Department	
Title: acterna proe base	
Author: sysadmin	
Comments:	
Folio_dID: 15	
Markup_BasedID: 0	
Security Group: Public	
Checked Out By:	
Status: Released	
Formats: Application/drw	
Links	5
Web Location: http://w2k3oucm103/idc/groups/public/documents/adacct/000010.drw	
Native File: <u>9545_0304_00.drw</u>	
Discussion: Create Discussion	
Folio Membership <u>Show</u>	~
🔍 Local intranet 🔍 100% 🔻	

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 VueLink for Oracle UCM, call or email us. Your input is an important part of the information used for revision.

General Inquiries

Telephone:	+1 514-735-3219
Fax:	(514) 735-6440
E-mail:	info@cimmetry.com
Web Site:	http://www.oracle.com/applications/autovue/index.html

Sales Inquiries

- **Telephone:** +1 514-735-3219 or 1-800-361-1904
- **Fax:** (514) 735-6440
- E-mail: sales@cimmetry.com

Customer Support

Telephone: +1 514-735-9941

Web Site: http://www.cimmetry.com/support