



AutoVue for Agile PLM

Installation and User Guide

Version 19.3.2

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Preface

The Agile PLM documentation set includes Adobe® Acrobat PDF files. The [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technology/documentation/agile.html) <http://www.oracle.com/technology/documentation/agile.html> contains the latest versions of the Agile PLM PDF files. You can view or download these manuals from the Web site, or you can ask your Agile administrator if there is an Agile PLM Documentation folder available on your network from which you can access the Agile PLM documentation (PDF) files.

Note To read the PDF files, you must use the free Adobe Acrobat Reader version 7.0 or later. This program can be downloaded from the [Adobe Web site](http://www.adobe.com) <http://www.adobe.com>.

The [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technology/documentation/agile.html) <http://www.oracle.com/technology/documentation/agile.html> can be accessed through **Help > Manuals** in both Agile Web Client and Agile Java Client. If you need additional assistance or information, please contact [support](http://www.oracle.com/agile/support.html) <http://www.oracle.com/agile/support.html> (<http://www.oracle.com/agile/support.html>) for assistance.

Note Before calling Oracle Support about a problem with an Agile PLM manual, please have the full part number, which is located on the title page.

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Readme

Any last-minute information about Agile PLM can be found in the Readme file on the [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technology/documentation/agile.html) <http://www.oracle.com/technology/documentation/agile.html>

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Go to the [Oracle University Web page](http://www.oracle.com/education/chooser/selectcountry_new.html) http://www.oracle.com/education/chooser/selectcountry_new.html for more information on Agile Training offerings.

Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

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Installing and Upgrading the Agile Viewer

AutoVue for Agile Version 19.3.2 Installer updates the Agile PLM Application Server and File Manager components for Agile PLM version 9.3, 9.2.2.x, or 9.2.1.x on all platforms. It also installs the Agile PLM View Server version 19.3.2 on Windows or Linux.

You must run the AutoVue for Agile Version 19.3.2 Installer on the Application Server and all File Managers as well as the machine where you wish to install the View Server. Select the **Agile Viewer** option in the installer if you wish to install the View Server and select the **Upgrade Viewer 19.3 Client Libraries** option if you are running the installer on an Application Server or File Manager. If your Application Server or File Manager is installed on the same machine as the View Server, then both the **Agile Viewer** and the **Upgrade Viewer 19.3 Client Libraries** options should be selected in the installer.

To install AutoVue for Agile Version 19.3.2:

1. Download Oracle AutoVue 19.3.2 from [Oracle E-Delivery](http://edelivery.oracle.com) (<http://edelivery.oracle.com>) to a temporary directory.
2. From the temporary directory, run the setup file for your platform

Windows: setup_av_win.exe

Solaris: setup_av_sol.bin

Linux: setup_av_lin.bin

AIX: setup_av_aix.bin

Solx86: setup_av_solx86.bin

The Install window appears.

3. For information about any screen in the installer, click **Help**.
4. Click **Next** to proceed through the installer.

Note If you are installing on an Application Server or File Manager, check the **Upgrade Viewer 19.3 Client Libraries** option on the Choose Install Components panel.

5. Click **Done** to finish the installation.

After installing on the Application Server:

You must redeploy the application.ear file and restart the application server after you have updated the client libraries. For instructions on restarting the application server, see either the *Installing Agile PLM on Oracle Application Server* or the *Installing Agile PLM on Oracle WebLogic Server* manual.

After installing on the File Manager:

You must redeploy the webfs.far file on the File Manager after you have updated the client libraries. Stop the file server and any additional Agile processes. Redeploy the File Manager:

- a. Change to the AGILE_HOME\Tomcat\webapps directory.

- b. Verify there is a directory named Filemgr under the webapps directory.
- c. If the Filemgr directory exists, then perform the following:

```
cd ..
```

```
mkdir webapps.old
```

Windows: move webapps\Filemgr webapps.old

UNIX: mv webapps/Filemgr webapps.old

- d. Start Tomcat.

A backup of the application.ear and webfs.war files is made before the client libraries are upgraded to version 19.3.2. If you are upgrading to version 19.3.2, the Profiles folder is also backed up and a new Profiles folder is created with the latest GUI files.

If you are upgrading from version 19.x:

You must remove the CMF files of the previous version on the file vault. To remove the CMF files, use the MetaFilesRemover utility located at agile_home\agileDomain\tools. The MetaFilesRemover utility removes metafiles from the file vault.

Unzip the MetaFilesRemover.zip file, then run the utility to remove the previous CMF files.

Usage: java -jar MetaFilesRemover.jar [-delete <value>] [-age <value>] [-size <value>] -basedir <value> -prefix <value> -serverURL <value> -username <value> -password <value>

where

- **delete** deletes the metafiles.
- **age** specifies the last access time (day).
- **size** specifies file size (KB).
- **basedir** is the file vault location where the metafiles are removed.
- **prefix** is the file name prefix.
- **serverURL** is the location of the DMS service, for example, <http://server.company.com:80/Agile/services/DmsService>.
- **username** is the DMS service username.
- **password** is the DMS service password.

Configuring Agile Viewer

This chapter includes the following:

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Overview

AutoVue for Agile allows users to view and mark up documents, drawings, and CAD files using a Web browser.

AutoVue for Agile consists of three installation components:

- AutoVue for Agile server
- AutoVue for Agile servlet
- AutoVue for Agile applet

AutoVue for Agile requires no maintenance on the client computer. A Web browser downloads the applet from the File Manager and stores it in the browser cache. The next time the AutoVue for Agile is launched, the applet is loaded from the cache, unless a new version is found on the File Manager.

The AutoVue for Agile servlet (VueServlet) is packaged and deployed as part of the File Manager installation. The VueLink Servlet is also deployed on the File Manager and tunnels the requests to the Agile Application Server using HTTP protocol. Because of this communication, each File Manager should have an associated Viewer on the same machine or separate machines. No additional configuration is required except that specified for the Agile Web client and the caching Viewer. The VueServlet is used to access AutoVue for Agile across firewalls from external clients, such as the Agile Web client, on standard HTTP/HTTPS ports.

Client Requirements

Client computers require a Java-compatible browser running on Windows 2000 Professional with SP4 or Windows XP Professional. Additionally, Java Clients require JRE 5.0.

Architecture

AutoVue for Agile was designed to provide server scalability to support increasing demand for file

viewing and markup on intranets and the Internet. Doubling the capacity is as simple as adding one more computer. The servers automatically divide up the load in a “peer-to-peer” fashion to avoid any bottlenecks.

AutoVue for Agile embeds several different rendering schemes to accommodate multiple environments. These schemes allow the server to take into account issues such as network bandwidth, load balancing between server and client, server configuration and performance, intranet/extranet/Internet use, and file size and format to be viewed. However, in all rendering options, AutoVue for Agile keeps all necessary information for querying purposes; the “intelligence” of drawings is preserved. For example, users can perform text searches on text and CAD files, or perform queries based on drawing attributes in a CAD file.

Depending on your network configuration (for example, existing firewalls, DMZ, secure connections, and proxy servers), a client is able to connect to the AutoVue for Agile server using direct sockets or the HTTP/HTTPS protocol (through a Java servlet) and avoid any security breach in your system.

Security

During the viewing process, documents available for viewing are rendered on AutoVue for Agile, and an intelligent and displayable data stream is delivered to the client. In this way, the AutoVue for Agile implementation eliminates any concerns about security since the original document is not transferred to the client computer. While the viewable data is being transmitted, AutoVue for Agile uses compression and streaming algorithms to achieve a quick and responsive feedback to the client side for large and multi-page documents.

The server has complete control over the functions available to clients. For example, users may be granted or denied rights to perform printing, redlining, or any other functions depending on their access permissions.

AutoVue for Agile uses cookies to track the number of users. The cookie is a unique number assigned to each browser that defines a user as a single session, regardless of the number of files a user consecutively or simultaneously opens.

Note	If you disable or refuse cookies in your browser, AutoVue for Agile will continue to work. However, each new instance of the browser creates a new session in AutoVue for Agile.
-------------	--

HTTPS can be used for secure communications if you tunnel all communications between the viewer client and the server through HTTPS, which uses SSL. The applet must communicate with the AutoVue for Agile server through the AutoVue for Agile servlet. Any Agile communications that are tunneled are encrypted using SSL.

Verifying the Firewall Configuration

The firewall on the Agile PLM side must be configured to allow:

- Incoming HTTP/HTTPS connections from the Internet to the Web server.
- Outgoing TCP/IP connections from the Web server in the DMZ to the Application Server inside the firewall on port 7001 or 7002 (SSL) for BEA WebLogic, port 7777 or 8888 (SSL) for Oracle Application Server, and port 8009 for the File Manager.

Starting AutoVue for Agile

Note After installation, the AutoVue Server service is set to Manual. To start AutoVue for Agile when the machine boots, set the service to Automatic.

To start the AutoVue for Agile on Windows:

Start the **AutoVue Server** service or Choose **Start > All Programs > AutoVue for Agile PLM > Start AutoVue Server**.

To start AutoVue for Agile on Linux:

1. In a console window, go to the `AGILE_HOME/AVS/bin` directory.
2. Type the following command to initialize the server:

```
jvueserver &
```

Testing the VueServlet

Note The Agile View servlet (VueServlet) is packaged and deployed as part of the File Manager installation. The VueLink Servlet is deployed on the File Manager and tunnels the requests to the Agile Application Server using HTTP protocol. No additional configuration is required.

The VueServlet is used to access Agile Viewer across firewalls from external clients on standard HTTP/HTTPS ports.

On the Application Server, you must make sure that the VueServlet has been loaded from the AutoVue for Agile home directory and that the VueServlet communicates with the Viewer. Open a browser and type the following URL in the location bar:

http://FileManager_hostname or `LoadBalancer:port/Filemgr/VueServlet`

A message should appear indicating that JVueServer is up and running. The sample page should appear that includes information about servlet tunneling and licensing.

- On Windows, if you receive the message “The page cannot be displayed,” make sure the World Wide Web server service is running on the computer. If it is not running, start the service from the Services window.
- If you specify this URL in the browser and receive the message “Page not found,” check the following:
 - Make sure that the Web server is accessible.
 - Check the web proxy configuration to ensure the virtual path and port number are correct. On Oracle Application Server, check the `9ias.conf` file. On WebLogic, check the `iisproxy.ini` file.

Managing Multiple Viewers for Load Balancing

AutoVue for Agile is designed to provide server scalability to support increasing demand for file viewing and markup on intranets and the Internet. It can run in a process pool on a single computer that improves the responsiveness for simultaneous connections and balances the load across a multi-CPU computer.

The default process pools four concurrent services. It is specified in the `javueserver.properties` file located in the AutoVue for Agile home folder at [\AGILE_HOME\AVS\bin](#):

```
javueserverx.nt.processPoolSize=4
```

As a general rule, you should allow approximately 50 MB for each process in the pool. A process pool size of four services requires approximately 200 MB of RAM. On a computer with 256 MB of RAM, this allows the remaining RAM to run the operating system and other services. Increasing the RAM on a computer allows you to increase the number of services using the process pool.

The system allows you to add servers to support more users while the servers are online, without restarting or disconnecting existing servers. Doubling the capacity is as simple as adding another computer. When using multiple viewers, the load can be efficiently balanced across the servers by manually directing the viewer client requests to different viewers.

Dynamic and static load balancing are supported. For more information, see the *AutoVue Client-Server Edition Installation and Administration Manual* mentioned in [Additional Agile Viewer Documentation](#) on page 15.

Multiple viewer functionality must be configured as follows:

- Each viewer computer acts independently.
- Each viewer computer can point to the same Agile Application Server computer or to a different Agile Application Server computer in a single or distributed Agile PLM system.
- The viewers are not clustered, so there is no single entry point computer for all Java clients to connect into any viewer.

For Agile Web clients outside the corporate firewall, the functionality for multiple viewers must be configured as follows:

- The AutoVue for Agile client applet can communicate across firewalls on a standard HTTP/HTTPS port.
- Each AutoVue for Agile computer acts independently.
- Each AutoVue for Agile computer can point to the same Agile Application Server computer or to a different Agile Application Server computer in a single or distributed Agile PLM system.
- External Agile Web clients are given different URLs that point to different Web servers hosting an Agile Web client with an AutoVue for Agile client and an AutoVue for Agile servlet. In turn, each AutoVue for Agile client and AutoVue for Agile servlet points to the different viewer to distribute the load.
- The viewers are not clustered, so there is no single entry point computer for all Agile Web clients to connect into any viewer.

To configure AutoVue for Agile server and AutoVue for Agile client communication across firewalls on specific ports, you should use standard HTTP ports.

Client-Server Communications

For AutoVue for Agile, the issue of using IP addresses for client-server communication at runtime (rather than hostnames or DNS names) is resolved because the Application Server also hosts the VueServlet. The VueServlet acts as a proxy for AutoVue for Agile, and it is placed on the intranet with other Agile server components. In addition, since the VueServlet is running on the Application Server with an Agile Web client, the Web server proxies also forward external requests to the intranet. The VueServlet comes as part of the File Manager installation.

Removing AutoVue for Agile

Follow these instructions to remove AutoVue.

To remove AutoVue for Agile on Windows:

1. Stop the AutoVue service.
 - a. Open the Services dialog box.
 - b. Select **AutoVue Server** and stop the service.
 - c. Close the Services dialog box.
2. Choose to **Start > Settings > Control Panel**.
3. Double-click **Add/Remove Programs**.

The Add/Remove Programs Properties dialog appears.
4. Scroll down the window and select **AutoVue Web Edition**.
5. Click **Change/Remove**.
6. Click **Uninstall**, and Click **OK** to confirm the deletion.
7. Click **Exit**.

To remove AutoVue for Agile from the Start menu:

1. Choose **Start > All Programs > AutoVue for Agile PLM > Setup > Uninstall AutoVue**.
2. Select and delete the installation folders from the location of Agile home directory.

To remove AutoVue for Agile on Linux:

1. Stop the AutoVue server by clicking **Shutdown** on the View Server applet or killing the `jvueserver` process.
2. Go to the `VIEWER_HOME/AVS/_uninst` directory.
3. Run the `uninstall_linux2.bin` file to uninstall AutoVue for Agile.

Troubleshooting AutoVue for Agile

This section contains information for troubleshooting your AutoVue for Agile installation.

AutoVue for Agile Errors

This section describes the errors that you may encounter when using AutoVue for Agile.

Java Client or the Web Client Cannot Connect

If you receive the following error messages when the Java Client or the Web Client tries to start AutoVue for Agile PLM, follow the directions provided in the solution:

- “jVue not found” appears because of the following:
 - Viewer Content URL in **Admin > Server Settings > Locations > File Manager** is incorrect.
 - Incorrect client applet alias specified instead of mandatory “jVue.”

Solution: Confirm that the Viewer Content URL is accessible and the jVue.jar file is listed.
- “An error occurred while connecting to the server. Restart the applet?” appears because of the following:
 - AutoVue for Agile or File Manager is down.
 - Incorrect View Server URL in **Admin > Server Settings > Locations > File Manager**.
 - AutoVue for Agile is configured incorrectly, or is unavailable.

Solution: Confirm that the Viewer Server URL is accessible and returns a successful connection status.

File Manager is Not Available

If you receive the following error message when the Java Client or the Web Client tries to connect to a file manager, follow the directions provided in the solution:

- “File not found” appears because of the following:
 - The file manager is down.
 - The VueServer.ini file points to incorrect file manager.

Solution: Confirm that the file manager is up and running.

Font Not Appearing Correctly

If an attachment uses special fonts, the computer where Viewer is installed must have those special fonts installed locally. Otherwise, a file error may occur or an incorrect font substitution may occur with viewing or printing the attachment.

For fonts other than the ones used by the operating system, the user's profile should include a reference to the location of the fonts in the XFONTPATHS parameter.

Changing Port Numbers

Some AutoVue for Agile PLM port numbers can be changed in the event of a port conflict. It is important to change the port number in all referenced locations.

- Port 5099 is used for communication between AutoVue for Agile PLM and its clients.

For AutoVue for Agile PLM, go to the \AVS\bin folder and open the jvueserver.properties file. Locate the following port information:

* Socket port number

jvueserver.socket.port=5099

You can change port 5099 to another available port number.

If you are changing the AutoVue for Agile port, update the port number in the vueservlet section of the web.xml file located at *AGILE_HOME\Tomcat\Tomcat\webapps\<FilemgrVirtualPath>\WEB-INF* on all viewer clients.

- Port 2001 is used for RMI.

For AutoVue for Agile PLM, go to the \AVS\bin folder and open the jvueserver.properties file. Locate the following port information:

* RMI Registry port number

jvueserver.rmi.port=2001

You can change port 2001 to another available port number.

Additional AutoVue for Agile PLM Documentation

On the computer where you installed AutoVue for Agile PLM, the *AutoVue Installation and Administration Manual* (install.pdf) is installed in the following location:

\AVS\docs

Please refer to the *AutoVue Installation and Administration Manual* for the following information:

- How to use the AutoVue Server Console.
- How to enable debugging information (logging) for AutoVue for Agile PLM.
- How to further configure AutoVue for Agile PLM.

Using AutoVue for Agile

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How to Use this Manual

This manual is a supplement to AutoVue online Help. It is intended to be used in conjunction with the viewer online help and other Oracle manuals.

AutoVue for Agile has been integrated into the Agile system to make use of the Agile's ability to manage attached files by using Agile system features. The integration also streamlines the viewer menus, toolbars, and shortcuts. The following table shows where you can find information about Agile features and concepts which you may find useful.

Feature or concept	Contained in this document
Java Client Navigation	<i>Getting Started with Agile PLM User Guide</i>
Web Client Navigation	<i>Getting Started with Agile PLM User Guide</i>
Relationships and rules between objects	<i>Getting Started with Agile PLM User Guide</i>
Attachment files	<i>Getting Started with Agile PLM User Guide</i>
Working with file folder objects	
File folder mass update	
Routing and reviewing file folders	
File validation (Handle Check Sum)	
Viewing and redlining file folder contents	
Redlining through ECOs, MCOs and SCOs	<i>Product Collaboration User Guide</i>

Getting Help

To get help at any time, choose **Help > Contents** in the AutoVue for Agile menu bar. The AutoVue online help is displayed; it includes detailed information about using viewer features.

Note See [Agile-specific Features and Functions](#) on page 25 for a complete list of features and user interface details described in the viewer online Help that have been modified in order to integrate AutoVue for Agile with the Agile system.

About AutoVue for Agile

AutoVue for Agile can display many different file formats without their authoring applications. You can view files from many database, graphic, spreadsheet, word-processing, and 2D CAD applications. Even archived files can be listed and viewed without the need to decompress them. It isn't necessary for you to identify the file type; AutoVue for Agile automatically identifies the type of file you are requesting it to read. An Agile administrator determines which types of files can be viewed by setting the Supported File Types property or, for Advanced Viewer, the Valid Model File Type property.

Important To view files through the Advanced Viewer, you need Agile Discovery, Read, and ViewFile privileges. To redline files through the Advanced Viewer, you need the Attachment Redlines privilege.

The action of attaching your comments, notes, and drawings to a document is known as *marking up*, also commonly known as annotating or redlining. A *markup* refers to the change being made to a document by attaching a markup object. You can use AutoVue for Agile to mark up files as well as view them.

Note Agile Java Client and Agile Web Client support attachment redlining. Markups for ECOs can be made on the **Redline Attachments** tab in Java Client and Web Client. You access the appropriate redline tab on the **Affected Items** tabs of ECOs. Markups for a file folder object can be made on the **Files** tab of the file folder object in Java Client and Web Client and do not require an ECO (Ad Hoc Markup).

Some of AutoVue for Agile's features are:

- **Flexible user-defined objects** — AutoVue for Agile offers a vast selection of markup objects, including circles, clouds, polygons, and arrows. Text can be attached to objects, and lengthier comments can be contained in embedded notes.

See AutoVue for Agile online help for a detailed discussion of markup objects. Choose **Help > Contents** in the AutoVue for Agile menu bar.
- **Storage of unedited original documents** — Original documents are never changed. All your notes and drawings are saved in a separate file called a markup file, although when viewed they appear to be part of the main document. You do not have to manage the storage and retrieval of markup files; Agile does that for you.
- **Support for non-English languages and operating systems** — AutoVue for Agile works with many non-English languages, and has been tested on Japanese, Chinese, French, German, Hebrew, and Swedish operating systems.


AutoVue for Agile Window

You can start AutoVue for Agile from either the item **Attachments** tab or the file folder **Files** tab.

To start AutoVue for Agile in Java Client:

Double-click the attachment row.

Or


1. Select one or more rows.
2. Click the **View File(s)** button's drop-down arrow and select **View**  from the menu.

Note If the **View** icon is visible on the button, you can simply click the button.

To start AutoVue for Agile in Web Client:

Click the file name link in the table.

Or

1. Select one or more rows.
2. **9.2.2.x or 9.2.1.x:** Click the **View File(s)** button's drop-down arrow and select **View**  from the menu.

Or

9.3: Click the **View** button's drop-down arrow and select **View** from the menu.

Note If the **View** icon is visible on the button, you can simply click the button.

When you start AutoVue for Agile, the main AutoVue for Agile window appears.

Note For more information about starting AutoVue for Agile, see [Opening Agile Attachment Files in AutoVue for Agile](#) on page 25.

Viewing an Attachment Tab Row with Multiple Files

When viewing files from the **Attachments** tab of an Agile business object in version 9.2.2.x or 9.2.1.x, if you view a single row that refers to a multiple-file file folder, the Select Files window appears. The Select Files window lists the files in that file folder and allows you to select one or more files that you want to view. In version 9.3, you can select the link of each individual file you want to view.

Note For more information about starting AutoVue for Agile, see [Opening Agile Attachment Files in AutoVue for Agile](#) on page 25.

Understanding AutoVue for Agile

The following sections describe the main AutoVue for Agile window and performance modes, plus

other information needed to use AutoVue for Agile.

Performance Modes

AutoVue for Agile has two performance modes: View and Markup.

View Mode

When a document is first opened from business object's **Attachments** tab or file folder **Files** tab, the menu bar and toolbars are those of View mode. View mode is AutoVue for Agile's default mode. Documents can be edited or marked up only from Markup mode, described in the next section.

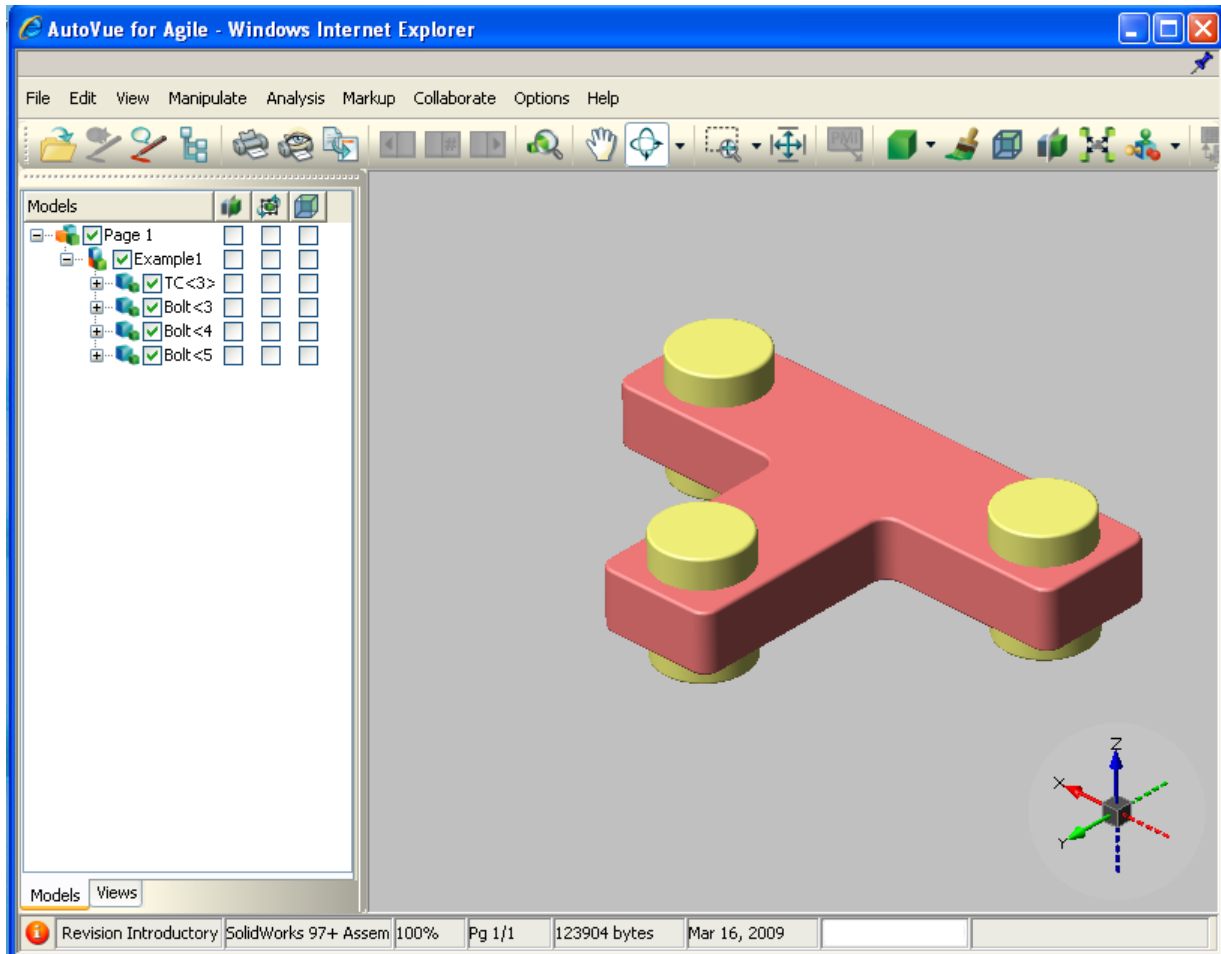
Markup Mode

When AutoVue for Agile is in Markup mode, the currently displayed document can be marked up. That is, you can redline or annotate it. Available markup objects include various shapes, notes, symbols, and text. When you open AutoVue for Agile from the **Redline Attachments** tab or **Files** tab in a file folder object, AutoVue for Agile opens either in View or Markup mode, depending on whether the attachment has a saved markup and the privileges assigned to the user. If the attachment is checked out, then the redlining will not be allowed, however, you can change to Markup mode to display saved markup. For instructions on how to enter Markup mode from View mode, see [Guidelines for Marking Up or Redlining Attachments](#) on page 27. When you open a markup file, Markup mode starts automatically.

Note	Markup mode is available only when the viewer is opened from tabs where markups are allowed: from a change order's Redline Attachments tab and from the Files tab of a file folder. In addition, you must have the appropriate Attachment Redlines for Self privilege. Contact your Agile administrator if you have questions about your assigned roles and privileges.
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AutoVue for Agile Window Components

There are a few basic components to the AutoVue for Agile work environment, shown in the following figure. These differ according to whether AutoVue for Agile is in View mode or Markup mode.



Menu Bar

The menu bar at the top of the window is the main access to all of the menu commands. The selection of available commands changes according to the mode the viewer is in and the task that you are performing.

Toolbars

The tool buttons under the menu bar offer easy access to the basic commands presented in the menu bar. As with menu commands, the selection of available toolbar buttons changes according to the mode the viewer is in and the task that you are performing.

Status Bar

In both View mode and Markup mode, there is a status bar located at the bottom of the main window. The fields from left to right for each mode's status bar are as follows: markers (see the following list), current active file name, file type, zoom factor, current page and total number of pages, current active file size, date of the file's creation, and the pointer's coordinate position.

The following types of markers can appear on the status bar:

- A **pen with an exclamation mark** indicates that the current active file has saved markup files. While in View mode, choose **Open** from the **Markup** menu to view the Markup Files dialog box. Then select a markup file or group of markup files to open. When you open a markup file, Markup mode starts automatically.
- A **red exclamation mark** indicates that some main resources required to properly read the current active document are not available (for example, missing fonts or missing CAD files). To quickly identify the missing resources, click the red exclamation mark, and the File Properties dialog box appears.

Moving Objects

You can use the left mouse button to click and drag.

- **In View mode** — By default, drag to perform an autozoom of all supported file formats (including raster and vector files). Select the area you want to enlarge.
- **In Markup mode** — If objects are selected, drag to modify and move objects. If no objects are selected, drag to perform an autozoom (same as in View mode).

To select an object, click it. Selected objects are framed by a text box. Modify the size of the object by dragging the frame handles. To move an object, move the cursor to the borders (the edges) of the markup entity until the cursor turns into a hand pointer. Drag the hand pointer to a new location.

Accessing Commands with Shortcut Menus

The easiest and quickest way to access most of AutoVue for Agile's functions is using the shortcut menus. Simply right-click with the pointer over the View window to access appropriate commands.

In View mode, use these commands:

- **Zoom Fit** — to automatically fit the document to the width of the view window.
- **Zoom Previous** — to automatically return to your previous zoom level.
- **Zoom Page Width** — to automatically fit the document to the width of the view window.
- **Markup/Exit Markup** — to enter and exit Markup mode and open an existing markup or create a new one. The **New Markup** command is available in View mode only when markups are allowed.

In Markup mode, use these additional commands:

- **Line Style** — to select a style of line to use in your markup.
- **Line Thickness** — to select a line thickness for use in your markup.

- **Fill Type** — to select the type of fill to apply to your markup object: Solid Fill, No Fill, or Transparent Fill.
- **Entity Color** — to select a color for your markup object.
- **Order** — to select the overlay order when several markups are being displayed simultaneously.
- **Markup Layers** — to select which layers are visible or active, change layer color, add new layers, and rename existing layers.

Canceling an Operation in Progress

To cancel an operation in progress, click the right mouse button. The current operation is canceled immediately. For example, if while drawing a box you realize that you would prefer to draw a cloud, right-click while drawing the box and the box is canceled.

If you have already drawn a box, you can either choose Edit > Undo from the menu bar or select the box and press the Delete key on your keyboard. What has already been drawn is erased.

Agile-specific Features and Functions

This chapter includes the following:

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Opening Agile Attachment Files in AutoVue for Agile


You can view files from either the **Attachments** tab of a business object or from the **Files** tab of a file folder object.


Viewing Files from Java Client

To view a file from Java Client, **Attachments** tab:

1. Go to the **Attachments** tab of a business object that references the file.
2. Double-click the attachment row.
 - If the attachment row refers to a file folder with only one file, AutoVue for Agile opens and displays that file.
 - If the attachment row refers to a multiple-file file folder, the Select Files window appears. Select one or more files to view and click **OK**. AutoVue for Agile opens and displays the files you selected.


Or, you can use the **Attachment** tab **View File(s)** button:


3. Go to the **Attachments** tab of a business object that references the file.
4. Select one or more attachment rows.
5. Click the **View File(s)** button's drop-down arrow and select **View**  from the menu.

Note If the **View**  icon is visible on the button, you can simply click the button.

- If you selected one attachment row that refers to a file folder with only one file, AutoVue for Agile opens and displays that file.
- If you selected one attachment row that refers to a multiple-file file folder, the Select Files window appears. Select one or more files to view and click **OK**. AutoVue for Agile opens and displays the files you selected.
- If you selected more than one attachment row, AutoVue for Agile opens and all the files in all the selected rows are displayed in the viewer. The Select Files window does not appear.

To view a file from Java Client, Files tab:

1. Go to the **Files** tab of a file folder object containing the files you want to view.
2. Double-click the filename in the file table.
AutoVue for Agile opens and displays the file.
3. Or, select one or more file rows.
4. Click the tab menu **View File(s)** button's drop-down arrow and select **View**  from the menu.

Note If the **View**  icon is visible on the button, you can simply click the button.

AutoVue for Agile opens and displays the selected files.

Viewing Files from Web Client

To view a file from Web Client, Attachments tab:

1. Go to the **Attachments** tab of a business object that references the file.
2. Click the file name link in the attachments table.
 - If the attachment row refers to a file folder with only one file, AutoVue for Agile opens and displays that file.
 - If the attachment row refers to a multiple-file file folder in version 9.2.2.x or 9.2.1.x, the Select Files window appears. Select one or more files to view and click **Finish**. AutoVue for Agile opens and displays the files you selected. In version 9.3, you can select the link of each individual file you want to view.

Or, you can use the **Attachment** tab **View** button:

3. Go to the **Attachments** tab of a business object that references the file.
4. Select one or more attachment rows.
5. Click the **View** button's drop-down arrow and select **View** from the menu.
 - If you selected one attachment row that refers to a file folder with only one file, AutoVue for Agile opens and displays that file.
 - If you selected one attachment row that refers to a multiple-file file folder, the Select Files window appears. Select one or more files to view and click **OK**. AutoVue for Agile opens and displays the files you selected.
 - If you selected more than one attachment row, AutoVue for Agile opens and all the files in all the selected rows are displayed in the viewer. The Select Files window does not appear.

To view a file from Web Client, Files tab:

1. Go to the **Files** tab of a file folder object containing the files you want to view.
2. Click the filename link in the file table.
AutoVue for Agile opens and displays the file.
3. Or, select one or more file rows.
4. Click the tab menu **View** button's drop-down arrow and select **View** from the menu.
AutoVue for Agile opens and displays the selected files.

Ad Hoc Markups

Ad hoc 2D, 3D, and EDA/ECAD markup can be done from the **Files** tab in the file folder object. Change order-controlled 2D, 3D, and EDA/ECAD markup can be done from the **Redline Attachments** tab in the ECO. When you view a markup file, the original document, also known as the base file, opens too.

Note Change order-controlled and ad hoc markups are independent from each other.

To view change order-controlled markups, open the redlined file from the appropriate revision of the item **Attachments** tab or from the change order **Redline Attachments** tab (see [Viewing ECO Redlines from the Attachments Tab of the Item Pending Revision](#) on page 30).

To view ad hoc markups, open the redlined file from the file folder object **Files** tab.

Marking Up — How It Works

Marking up refers to drawing and writing in an electronic document. With AutoVue for Agile, your original document remains unchanged because your markups are saved in separate markup files. When you view a markup file, AutoVue for Agile loads the markups into memory and lays them over the original document.

There can be as many markup files as you wish for a document because each has its own unique filename. This allows several individuals to mark up the same document at the same time because a unique markup file is created for each person's work. With the markup information attached to each markup file, you can even tell who created each markup.

Markup files are divided into uniquely named layers. Create, name, and color the layers to organize your work as you like. For example, different colors could indicate time priorities, and each layer could contain markups relating to a common purpose. Markup files are stored with other attachment files in the file vault, part of Agile File Manager. Markup files are managed by Agile and are automatically retrieved and presented when you view the redlined document.

Guidelines for Marking Up or Redlining Attachments

With appropriate privileges, you can redline Microsoft Office documents, 2D, 3D, and EDA files on the **Files** tab of a file folder object and redline 2D, 3D, and EDA files on the **Redline Attachments** tab,

accessible from the **Affected Items** tab of an ECO.


Note You can create and edit file markups only through the **Affected Items** tab of an ECO or the **Files** tab of a file folder object. Your Agile administrator must give you privileges that allow you to mark up or redline attachments. For more information about ECOs and file folder objects, see the *Getting Started with Agile PLM User Guide*.


Java Client ECO Markups


To mark up or redline an attachment file from an ECO in the Java Client:

1. If you have not already done so, add an item with an attachment to the **Affected Items** tab of an unreleased ECO. The item now has a pending revision associated with the unreleased ECO.

When redlining an attachment through an ECO, the pending revision attachment Folder Version must be set to a specific version number; if the Folder Version is set to **LATEST-x**, you will not be able to create redline markups. However, you can edit the Folder Version on the **Attachments** tab of the pending revision so that it refers to a specific Folder Version.



For example, if the pending revision of the item refers to Folder Version **LATEST-7** of the file folder, select that row on the **Attachments** tab, click the **Edit**  button and use the **Folder Version** drop-down list in the Edit dialog box to select 7. Click **OK** to complete the edit process. You will now be able to create redline markups for that attachment. Select the added item on the **Affected Items** tab of the ECO.

On the **Redline Attachments** tab, select the row containing the file you want to redline and click the Do Redlining  icon.

2. When the AutoVue for Agile appears, click the **New Markup**  button. (This button is available only when markups are allowed.)
3. Use the tools described in the online Help to redline the attachment. To view online Help, choose **Help > Content** in the menu bar.


Note ECO markups are saved against and associated with the pending revision of the item. If the ECO is released without first replacing the file, the markups appear against the released revision of the item..

To ad hoc mark up or redline an attachment file from a file folder object in the Java Client:

1. Select the row containing the file you want to redline and click the Do Redlining  icon.
2. When AutoVue for Agile appears, click the **New Markup**  button. (This button is available only when markups are allowed.)
3. Use the tools described in the online Help to redline the attachment. To view online Help, choose **Help > Content** in the menu bar.

Note ECO markups are saved against and associated with the pending revision of the item. If the ECO is released without first replacing the file, the markups appear against the released revision of the item.

Web Client ECO Markups for Agile PLM 9.3

Note If the item or file has already been redlined, then the **Has been redlined**  icon will be displayed.

To mark up or redline an attachment file from an ECO in the Web Client:

1. If you have not already done so, add an item with an attachment to the **Affected Items** tab of an unreleased ECO. The item now has a pending revision associated with the unreleased ECO.

When redlining an attachment through an ECO, the pending revision attachment Folder Version must be set to a specific version number; if the Folder Version is set to **LATEST-x**, you will not be able to create redline markups. However, you can edit the Folder Version on the **Attachments** tab of the pending revision so that it refers to a specific Folder Version.

For example, if the pending revision of the item refers to Folder Version **LATEST-7** of the file folder, select that row on the **Attachments** tab, click the **Edit** button and use the **Folder Version** drop-down list to select 7. Click **Save** to complete the edit process. You will now be able to create redline markups for that attachment. On the **Affected Items** tab, click the **Do Redlining** icon for that item to open the Redlines page.

2. On the **Affected Items** tab, select the row of the Item you want to redline. The redline tabs for the selected item are displayed in the lower section of the Affected Items tab.
3. On the **Redline Attachments** tab, select one or more rows and click the **Redline** button.
4. Use the tools described in the viewer online Help to redline the attachment. To view online Help, choose **Help > Content** in the menu bar.


ECO markups are saved against and associated with the pending revision of the item. If the ECO is released without first replacing the file, the markups appear against the released revision of the item.

To ad hoc mark up or redline an attachment file from a File Folder object in the Web Client:

1. On the **Files** tab of a file folder object, select one or more rows and click the **Redline** button.
2. Use the tools described in the viewer online Help to redline the attachment. To view online Help, choose **Help > Content** in the menu bar.

Ad hoc markups are saved against and associated with the version of the file folder object.

Web Client ECO Markups for Agile PLM 9.2.2.x or 9.2.1.x





Note If the item or file has already been redlined, then the **Has been redlined** icon  will be displayed in the place of the Do Redlining icon.

To mark up or redline an attachment file from an ECO in the Web Client:

1. If you have not already done so, add an item with an attachment to the **Affected Items** tab of an unreleased ECO. The item now has a pending revision associated with the unreleased ECO.



Note When redlining an attachment through an ECO, the pending revision attachment Folder Version must be set to a specific version number; if the Folder Version is set to LATEST-x, you will not be able to create redline markups. However, you can edit the Folder Version on the Attachments tab of the pending revision so that it refers to a specific Folder Version.

For example, if the pending revision of the item refers to Folder Version **LATEST-7** of the file folder, select that row on the **Attachments** tab, click the **Edit** button and use the **Folder Version** drop-down list to select 7. Click **Save** to complete the edit process. You will now be able to create redline markups for that attachment. On the **Affected Items** tab, click the **Do Redlining** icon for that item to open the Redlines page.

2. On the **Affected Items** tab, click the **Do Redlining** icon  (or **Has been redlined** icon ) next to the item to open the Redlines page.
3. On the **Redline Attachments** tab, click the **Do Redlining** icon  (or **Has been redlined** icon ) on the row of the file you want to redline. (This icon is available only when markups are allowed.)
4. Use the tools described in the online Help to redline the attachment. To view online Help, choose **Help > Content** in the menu bar.

Note ECO markups are saved against and associated with the pending revision of the item. If the ECO is released without first replacing the file, the markups appear against the released revision of the item

To ad hoc mark up or redline an attachment file from a File Folder object in the Web Client:

1. On the **Files** tab of a file folder object, click the **Do Redlining** icon  (or **Has been redlined** icon ) on the row of the file you want to redline. (This icon is available only when markups are allowed.)
2. Use the tools described in the viewer online Help to redline the attachment. To view online Help, choose **Help > Content** in the menu bar.

Note Ad hoc markups are saved against and associated with the version of the file folder object.




Redlining Markups for Change Orders

The change order redlines of 2D, 3D, and EDA files are based on the pending revision of the item. The markup changes are visible from either the change order's **Redline Attachments** tab or from the pending revision item **Attachments** tab.

3D features and access to 3D files are available only with AutoVue Electromechanical Pro. Features for schematic and PCB files, also referred to as EDA files, are available only with AutoVue Electromechanical Pro. For more information about purchasing or installing AutoVue Electromechanical Pro, contact Oracle Consulting – Agile Practice.


Viewing ECO Redlines from the Attachments Tab of the Item Pending Revision

You can view the change order markup redlines of the pending revision by displaying the **Attachments** tab of the item pending revision, for example, revision (C) **ECO000453**. The redlined file is indicated by the **Has been redlined** icon.




- In Java Client, select the redlined file you want to view and click the **Has been redlined**  icon.
- In Web Client, click the **Has been redlined** () for versions 9.2.2.x and 9.2.1.x,  for version 9.3) icon in the row of the file you want to view.

If you have checked out the redlined file and checked in a new version from the **Attachments** tab, the **Has been redlined** icon does not appear on the Attachments table.

To view the redlines of previous versions in Java Client:

1. On the **Attachments** tab of the pending revision, select the row you want to view.
2. Click the **Show Versions** button. The Versions dialog appears.
3. On the version row for which you want to view redlines, click the **Has been redlined**  icon.

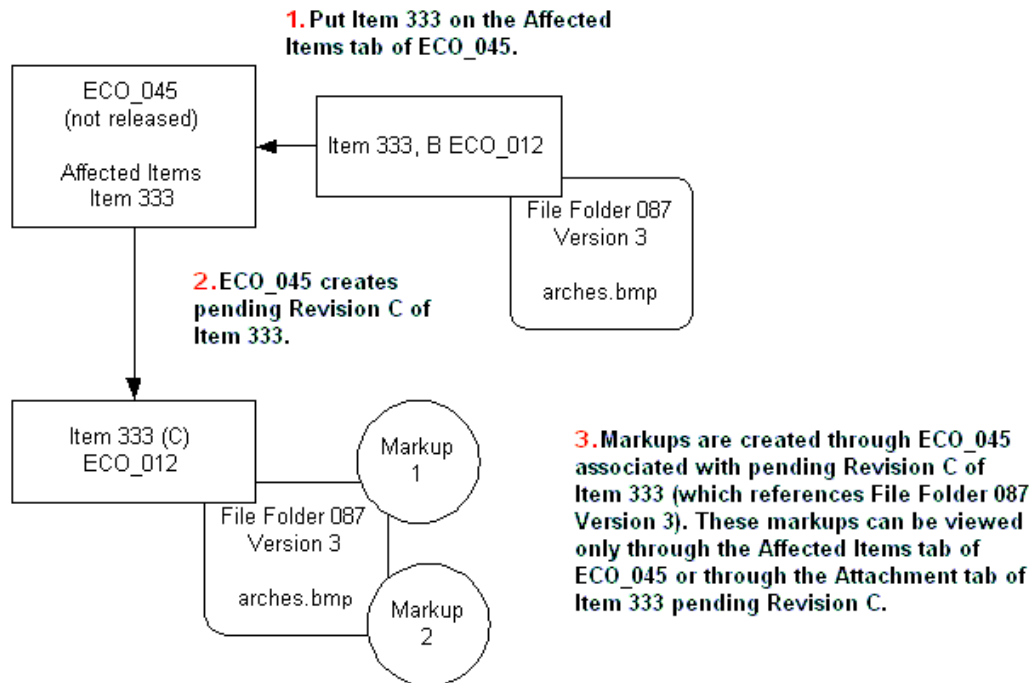
To view the redlines of previous versions in Web Client:

1. **9.2.2.x/9.2.1.x:** On the **Attachments** tab of the pending revision, click the **Show Versions**  icon in the row you want to view. The Versions dialog appears.
9.3: Select **View Versions** from the Actions menu.
2. On the version row for which you want to view redlines, click the **Has been redlined** () for versions 9.2.2.x and 9.2.1.x,  for version 9.3) icon.

Note If you need to determine which file folder version is associated with the change order redlines, refer to the change order **History** tab.

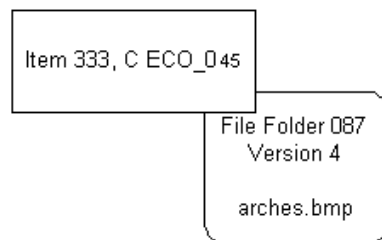
However, if the attachment file on the pending revision item is not replaced prior to the change order release, the redlines will be accessible from the released revision of the item. The following diagram shows an example of the change order attachment redlining process.

See also *Product Collaboration User Guide* and *Getting Started with Agile PLM*.



4. ECO_045 is reviewed, approved, and released.
File arches.bmp in File Folder 087 is not yet updated and remains at Version 3 with markups. Released Item 333 Revision C includes attachment markups viewable from the released item's Attachments tab..

5. arches.bmp is checked out, modified, and checked in. File Folder 087 is updated to Version 4. Now released Item 333 Revision C does not include attachment markups.



6. To view the redlined version 3 of arches.bmp, use the Show Versions feature on the Attachments tab of Released Item 333 Revision C or on the Redline Attachments tab of ECO_045. Click (Web Client) or double-click (Java Client) the Has Been Redlined icon in the version history dialog table to view arches.bmp, Version 3, and its markups.

Marking Up Documents

For information about working with markups, including markup layers and markup objects, refer to the viewer online help. Choose **Help > Contents** in the AutoVue for Agile menu bar.

Tips for Marking Up Documents

If you exit AutoVue for Agile without saving, you will lose any redline you have added to the attachment.

Attaching Information to Markup Files

In Markup mode, the **Markup > Properties** command displays the Markup Information dialog box with five information fields attached to the current active markup file.

Object Rotate

Object Rotate allows you to rotate symbol markup objects.

To rotate a symbol markup object:

1. Select the symbol markup object you want.
2. Click the **Rotate** button, or choose **Markup > Object > Rotate**.
When this feature is activated, the **Rotate** button appears as a recessed button (light gray) on the toolbar.
3. Place the cursor on one of the corner squares that indicate the selected object.
4. When you see the crossed-arrows cursor (pointing in four directions), hold down the left mouse button and adjust the rotation angle of the object.
5. Release the mouse button when you are finished adjusting the rotation angle.

2D Features and Functions

For information about working with 2D files, including CAD views and measuring objects, refer to the viewer online help. Choose **Help > Contents** in the AutoVue for Agile menu bar.

EDA Features and Functions

AutoVue for Agile EDA features include:

- Ability to view all relevant EDA formats including artwork formats, PCB/IC layouts, schematics and manufacturing formats
- Cross probe between a PCB layout and related schematics (see [Cross Probing](#) on page 36).

- Verify design by testing for manufacturability or design violation.
- Generate and export Bills of Material in a variety of formats.

For detailed information about all the EDA features, refer to the viewer online help. Choose **Help > Contents** in the AutoVue for Agile menu bar.

Important EDA features and access to EDA files are available only with AutoVue Electromechanical Pro. Features for schematic and PCB files, also referred to as EDA files, are available only with AutoVue Electromechanical Pro. For more information about purchasing or installing AutoVue Electromechanical Pro, contact Oracle Consulting – Agile Practice.

3D Features and Functions

For information about working with 3D files, including light settings and models, refer to the viewer online help. Choose **Help > Contents** in the AutoVue for Agile menu bar.

Important 3D features and access to 3D files are available only with AutoVue Electromechanical Pro. For more information about purchasing or installing AutoVue Electromechanical Pro, contact Oracle Consulting – Agile Practice. The following AutoVue for Agile Actions can be used from the Cross Probing, Comparing Files, Overlaying Files, and Digital Mock Up functions:

- Browse – Opens the File Open window. From this window, system files can be loaded and viewer actions (Cross Probing, Comparing Files, Overlaying Files, and Digital Mock Up) can be done.
- Agile Browse - Opens the Bookmark window. From this window, you can do book marked business objects viewer actions.
- Agile Search - Opens the Agile Search window. From this window, you can load attachments from business objects to do AutoVue for Agile actions.

Understanding 3D Basics

3D CAD assemblies are made up of many files dependent one upon another. For example, a SolidWorks or Pro/E CAD design consists of at least one assembly file and one or more part files. The 3D files are used primarily in manufacturing departments for drawing the blueprint of the new instrument. 3D files may be added to the **Files** tab in one or several file folder objects.

- One File Folder

All files in one CAD assembly are added to the Files tab of one file folder. When you view the assembly, Agile prompts you to identify the top file in the assembly and the complete assembly is displayed in AutoVue for Agile.
- One Design

Assembly Files are added to the Files tab and parts files can be referenced from the Design

added to the Structure tab.

▫ **Multiple File Folders**

The assembly file is added to the **Files** tab in one file folder object, and parts files can be referenced by adding other file folder objects containing the files as relationships with no rules to the **Relationships** tab of the assembly's file folder object.

3D files can be redlined both through a change order (Redline Attachments) and on the **Files** tab of the file folder object.


Viewing 3D CAD Assemblies in a Multiple-file File Folder from Java Client

To view a CAD assembly from Java Client, Attachments tab:


1. Go to the **Attachment** tab of the business object that references the assembly.
2. Double-click the multiple-file attachment row that references the CAD assembly. The Select Files window appears.

Note A multiple-file attachment row is indicated by a file folder icon in the **Filename** field, followed by the filenames of all the files in the file folder.

Or use the **Attachment** tab **View File(s)** button:

- a. On the business object **Attachments** tab, click to select the multiple-file attachment row.
 - b. Click the **View File(s)** button's  drop-down arrow and select **View** from the menu.
3. In the Select Files window, click the radio button to select the option **View all files as an assembly, starting from the selected file**.
 4. Click to select the file row of the assembly file that indicates the top or starting file of the assembly.
 5. Click **OK**.

To view a CAD assembly from Java Client, Files tab:

1. Go to the **Files** tab of a file folder object containing the CAD files for the assembly that you want to view.
2. Click to select the row for the top or starting file of the assembly.
3. Click the **View File(s)** button's  drop-down arrow and select **View**.

Viewing 3D CAD Assemblies in a Multiple-file File Folder from the 9.3 Web Client

To view a CAD assembly from Web Client, Attachments tab:

1. Go to the **Attachment** tab of the business object that references the assembly.
2. Click the multiple-file attachment row that references the CAD assembly.

Note A multiple-file attachment row is indicated by a file folder icon in the **Filename** field, followed by the filenames of all the files in the file folder.

Use the **Attachment** tab **View** button:

- a. On the business object **Attachments** tab, click to select the multiple-file attachment row.
- b. Click the **View** button's drop-down arrow and select **View** from the menu.

To view a CAD assembly from Web Client, Files tab:

1. Go to the **Files** tab of a file folder object containing the CAD files for the assembly that you want to view.
2. Click to select the row for the top or starting file of the assembly.
3. Click the **View** button's drop-down arrow and select **View** menu.


Viewing 3D CAD Assemblies in a Multiple-file File Folder from the 9.2.2.x or 9.2.1.x Web Client

To view a CAD assembly from Web Client, Attachments tab:


1. Go to the **Attachment** tab of the business object that references the assembly.
2. Double-click the multiple-file attachment row that references the CAD assembly. The Select Files window appears.

Note A multiple-file attachment row is indicated by a file folder icon in the **Filename** field, followed by the filenames of all the files in the file folder.

Or use the **Attachment** tab **View File(s)** button:

- a. On the business object **Attachments** tab, click to select the multiple-file attachment row.
- b. Click the **View File(s)** button's  drop-down arrow and select **View** from the menu.
3. In the Select Files window, click the radio button to select the option **View all files as an assembly, starting from the selected file**.
4. Click to select the file row of the assembly file that indicates the top or starting file of the assembly.
5. Click **Finish**.

To view a CAD assembly from Web Client, Files tab:

1. Go to the **Files** tab of a file folder object containing the CAD files for the assembly that you want to view.
2. Click to select the row for the top or starting file of the assembly.
3. Click the **View File(s)** button's  drop-down arrow and select **View As Assembly** from the menu.

Cross Probing

Cross probing is also described in the viewer online Help. In Agile, this feature is initiated from either the business object **Attachments** tab or the file folder **Files** tab rather than from the viewer menus. For detailed information about cross probing features, see the online help. Choose **Help > Contents** in the AutoVue for Agile menu bar.

Important Cross probing features are available only with AutoVue Electromechanical Pro. In order to use these features, you must have AutoVue Electromechanical Pro. For more information about purchasing or installing AutoVue Electromechanical Pro, contact Oracle Consulting – Agile Practice.

Important Use cross probing to interrogate ECAD schematic and layout files in separate viewer windows.

Note The Agile administrator should specify the ECAD file extension in the **Valid Model File Type** field for you to view the ECAD files.

You can select both needed files from the same **Attachments** tab or the same file folder **Files** tab from which you launch the Cross Probe action. Or, you can select one file on the current tab and then search for the remaining file from the attachments of any other object.

The **View > By Search > Crossprobe** option allows you to find other files in the system, which you may want to use to cross probe, without having to select two files from the same **Attachments** tab or **Files** tab; that is, you can search and select one attached file from Part 234 and another attached file from Part 765.

Alternatively, you can view a single ECAD file then initiate cross probing within the viewer by adding another file from your desktop.

To run Cross Probing:

1. Display the **Attachments** tab or the **Files** tab.
2. Select both file rows you want to work with and choose:
 - Java Client: **View File(s) > Cross Probe**.
 - 9.2.2.x or 9.2.1.x Web Client: **View > Cross Probe**.

Each file is displayed in a separate viewer window.

3. Begin cross probing.

See AutoVue for Agile online help for more information about cross probing. Choose **Help > Contents** in the AutoVue for Agile menu bar.

Cross Probing in Java Client and Web Client

To run Cross Probing:

1. Display the **Attachments** tab or the **Files** tab.
2. Select both file rows you want to work with and choose:
 - Java Client: **View File(s) > Cross Probe**.
 - 9.2.2.x or 9.2.1.x Web Client: **View > Cross Probe**.
 - 9.3 Web Client: **View**. The file opens in AutoVue for Agile, then choose **Analysis > Cross Probe**.

Each file is displayed in a separate viewer window.

3. Begin cross probing.

See the online help for more information about cross probing. Choose **Help > Contents** in the AutoVue for Agile menu bar.

To run Cross Probing By Search:

1. Display the **Attachments** tab or the **Files** tab.
2. Select a file row you want to work with and choose:
 - Java Client: **View File(s) > By Search > Cross Probe**.
 - 9.2.2.x or 9.2.1.x Web Client only: **View > By Search > Cross Probe**.

The Select Files dialog appears, with three Search tabs.

3. The search dialog allows you to search for any business object (for example, items or manufacturer parts) and select the attachments of those objects to use to Cross Probe.

Use any of the following search methods:

- **Search** tab lets you create a simple search or an advanced search. You can check to search attachment contents, too.
- **Saved Searches** tab opens to your navigation pane where you can browse in search folders, select a search, and run it. Again, returned results may be moved to the **Selected Items** table, and click **OK**.
- **Shortcuts** tab opens to your navigation pane where you can select objects from **My Bookmarks** or **Recently Visited**. The system displays shortcuts to only those objects that are appropriate to the operation you are performing.

Only business objects with attached files appear in the search results table. For example, a business object that you viewed recently will not appear on the Recently Visited list of the Shortcuts tab if it has no attachments.

4. When the results of your search are returned, select a row in the Results table, and the related files for that object appear in the Related Files table.
5. In the Related Files table, select and move attachments to the Selected Files table.
6. You can continue to run multiple searches or shortcuts until you are finished selecting the attachments you want.
7. When you are finished, click **OK**.

Each file is displayed in a separate viewer window.

8. Begin cross probing.

See the online help for more information about cross probing. Choose **Help > Contents** in the AutoVue for Agile menu bar.

Comparing Files

Comparing files is also described in the AutoVue for Agile online Help. In Agile, rather than initiating file compare from the viewer menus, you initiate file compare from either the file folder **Files** tab or the business object **Attachments** tab.

For detailed information about file comparison features, see the online help. Choose **Help > Contents** in the AutoVue for Agile Menu bar.

Compare file features are available only with AutoVue Electromechanical Pro. For more information about purchasing or installing AutoVue Electromechanical Pro, contact Oracle Consulting – Agile Practice.

Markups and Comparing Files

Markups (redlines) are not supported in the AutoVue for Agile compare mode.

Comparing Files in Java Client and Web Client

You can select and compare two files from a single file folder **Files** tab or a single business object **Attachments** tab.

To initiate comparing files:

1. Display the **Attachments** tab or the **Files** tab.
2. Select both files you want to work with and choose:
 - Java Client: **View File(s) > Compare**
 - Web Client: **View > Compare**

The files and the comparison results are displayed in a single viewer window.

For more information about compare file features and options, choose **Help > Contents** in the AutoVue for Agile menu bar.

Comparing Files By Search

The **View > By Search > Compare** command allows you to

- Compare files from different released revisions of an item.
- Compare files from different file folder versions.
- Select any file on any business object **Attachments** tab or on any file folder **Files** tab, and then search for a file to use for comparison.

Depending on your search, you can select a business object, and then select a file from the list of related files for that object. Or, if you have the appropriate privileges, you can search for file folder objects, and then select a file from the list of related files for the selected file folder.

Note For item objects, Introductory revisions and unreleased pending revisions do not appear in the related files list.

To initiate comparing files by Search:

1. Display the **Attachments** tab or **Files** tab.
2. Select a file row you want to work with and choose:
 - Java Client: **View File(s) > By Search > Compare**
 - 9.2.2.x or 9.2.2.a Web Client: **View > By Search > Compare**
 - 9.3 Web Client: **View > Compare by Search** (A search dialog allows you to search for the

object.)

The following steps apply to the Java Client and 9.2.2.x and 9.2.1.x Web Client only:

3. The Compare Files by Search dialog allows you to search for any business object (for example items or manufacturer parts) and select the attachments of those objects to compare.

Use any of the following search methods:

- **Search** tab lets you create a simple search or an advanced search. You can check to search attachment contents, too.
- **Saved Searches** tab opens to your navigation pane where you can browse in search folders, select a search, and run it. Again, returned results may be moved to the Selected Items table, and Click **OK**.
- **Shortcuts** tab opens to your navigation pane where you can select objects from **My Bookmarks** or **Recently Visited**. The system displays shortcuts to only those objects that are appropriate to the operation you are performing.

Only business objects with attached files appear in the search results table. For example, a business object that you viewed recently will not appear on the Recently Visited list of the **Shortcuts** tab if it has no attachments.

4. When the results of your search are returned, select a row in the results table, and the related files for that object appear in the Related Files table.
5. In the Related Files table, select the file you want.
 - If the selected search object is a file folder, use the **Version** drop-down list in the Related Files table to select the file folder version you want.
 - If the selected search object is an item, the Related Files table displays item attachments for each released revision of the item (the file name followed by the revision number or letter, for example, `widget.dwg - A` and `widget.dwg - B`).

Note For item objects, Introductory revisions and unreleased pending revisions do not appear in the related files list.

- If the selected search object is a business object, check the **Show Matching File Types Only** checkbox to display only the related files that are the same file type as the file with which you want to compare.
6. When you are finished, click **OK**.

You can continue to run multiple searches or shortcuts until you are finished selecting the attachments you want.

The files and the comparison results are displayed in a single viewer window. For more information about compare file features and options, choose **Help > Content** in the AutoVue for Agile menu bar.

Overlaying Files

Overlaying files is also described in the viewer online Help. In Agile, this feature is initiated from the file folder **Files** tab rather than from the viewer menus. For detailed information about file overlay features, see the viewer online help. Choose **Help > Contents** in the AutoVue for Agile menu bar.

Overlaying files features are available only with AutoVue Electromechanical Pro. For more information about purchasing or installing AutoVue Electromechanical Pro, contact Oracle

Consulting – Agile Practice.

Overlaying Files in Java Client and Web Client

To initiate overlaying files:

1. Display the **Attachments** tab or the **Files** tab.
2. Select both file rows you want to work with and choose:
 - Java Client: **View File(s) > Overlay**.
 - Web Client: **View > Overlay**.

The files are displayed in a single viewer window, one on top of the other. For more information about overlay file features (for example, **File > Overlays** in the menu bar) and options, choose **Help > Contents** in the AutoVue for Agile menu bar.

To initiate overlaying files By Search:

1. Display the **Attachments** tab or the **Files** tab.
2. Select a file row you want to work with and choose:
 - Java Client: **View File(s) > By Search > Overlay**.
The Select Files dialog appears, with three Search tabs.
 - 9.2.2.x or 9.2.1.x Web Client: **View > By Search > Overlay**.
The View Files by Search dialog appears, with three Search tabs.
 - 9.3 Web Client: **View**. The file opens in AutoVue for Agile, then choose **File > Import File as Overlay**.

The following steps apply to the Java Client and 9.2.2.x and 9.2.1.x Web Client only:

3. The search dialog allows you to search for any business object (for example, items or manufacturer parts) and select the attachments of those objects to use to overlay.

Use any of the following search methods:

- **Search** tab lets you create a simple search or an advanced search. You can check to search attachment contents, too.
- **Saved Searches** tab opens to your navigation pane where you can browse in search folders, select a search, and run it. Again, returned results may be moved to the **Selected Items** table, and click **OK**.
- **Shortcuts** tab opens to your navigation pane where you can select objects from **My Bookmarks** or **Recently Visited**. The system displays shortcuts to only those objects that are appropriate to the operation you are performing.

Only business objects with attached files appear in the search results table. For example, a business object that you viewed recently will not appear on the Recently Visited list of the Shortcuts tab if it has no attachments.

4. When the results of your search are returned, select a row in the Results table, and the related files for that object appear in the Related Files table.
5. In the Related Files table, select and move attachments to the Selected Files table.
6. You can continue to run multiple searches or shortcuts until you are finished selecting the

attachments you want.

7. When you are finished, click **OK**.

The files are displayed in a single viewer window, one on top of the other. For more information about overlay file features (for example, **File > Import File as Overlay** in the menu bar) and options, choose **Help > Contents** in the AutoVue for Agile menu bar.

Working with Schematic and PCB Files

Important	Features for schematic and PCB files, also referred to as EDA files, are available only with AutoVue Electromechanical Pro. For more information about purchasing or installing AutoVue Electromechanical Pro, contact Oracle Consulting – Agile Practice. For information about these features, refer to the viewer online help. Choose Help > Contents in the AutoVue for Agile menu bar.
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Real-Time Collaboration

For detailed information about collaboration features, refer to the viewer online help. Choose **Help > Contents** in the AutoVue for Agile menu bar. The following sections discuss AutoVue for Agile server information and Agile privileges that affect collaboration sessions.

Real-time collaboration features are available only with AutoVue Electromechanical Pro. For more information about purchasing or installing AutoVue Electromechanical Pro, contact Oracle Consulting – Agile Practice.

Overview of Collaboration Sessions

The Collaborate feature lets multiple users team up and review documents interactively and simultaneously, thus shortening an otherwise lengthy review process where documents are passed back and forth. The Collaborate feature is available to all users who have Agile Discovery, Read, and Attachment Redlines privileges.

From the **Collaborate** menu, anyone with the required Agile privileges can initiate a Collaboration session and act as host, or join a Collaboration session if invited by the host.

Important	If you plan to host a Collaboration session, ensure that all intended participants have Discovery, Read, and Attachment Redlines privileges. If they can view and redline a file, they have the necessary privileges. If they cannot, contact your Agile administrator, who can grant them the necessary privileges, <i>before</i> you attempt to initiate the Collaboration session.
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In order to participate in the collaboration session, all the collaborators must be logged into Agile and viewing a file in the viewer when you start the collaboration session. They do not need to view the file you are going to review in the collaboration session; they can view any file. For this reason, they may choose to view a small file that will load quickly.

When the host initiates a Collaboration session, a session object is created on the server, which is maintained for the duration of the Collaboration session. Session information is available from the

Collaborate menu during a Collaboration session. It displays the session subject (the name assigned to the Collaboration session), the session ID (each session subject is assigned a unique session ID), the name of the base file viewed, the host, and the list of users participating.

A session markup file is created during the Collaboration session to which all participants can add markup entities. Participants are assigned different layer colors for the session so that the markup entity from each participant is identifiable. The host for the session owns the markup file and is the only one who can save it.

Note All users must connect to the same AutoVue for Agile server to use the collaboration feature. Remote users may have to change their preferred File Manager profile setting in a distributed File Manager environment.

Digital Mockup

In 3D mode, you can use the Mockup feature (DMU) to test alignment and interference of multiple assemblies. You can save the mockup as a redline markup entity.

Digital Mockup in Java Client and Web Client

To initiate Digital Mockup of files:

1. Display the **Attachments** tab or the **Files** tab.
2. Select all the file rows you want to work with and choose:
 - Java Client: **View File(s) > Digital Mockup**.
 - 9.2.2.x or 9.2.1.x Web Client: **View > Digital Mockup**.
 - 9.3 Web Client: **View > View**. After AutoVue for Agile opens, chose **File > Import file for Mockup**.
3. Manipulate the models using the viewer features including the features in the **Analysis** menu, for example User Defined Coordinate Systems, Manipulators, Interference Checking, and Part Alignment.

For information about these features, refer to the viewer online help. Choose **Help > Contents** in the AutoVue for Agile menu bar.

To initiate Digital Mockup of files By Search:

1. Display the **Attachments** tab or the **Files** tab.
2. Select a file row you want to work with and choose:
 - Java Client: **View File(s) > By Search > Digital Mockup**.
The Select Files dialog appears, with three Search tabs.
 - 9.2.2.x or 9.2.1.x Web Client: **View > By Search > Digital Mockup**.
The View Files by Search dialog appears, with three Search tabs.
 - 9.3 Web Client: **View > View**. After AutoVue for Agile opens, choose **File > Import file for Mockup**.

The following steps apply to the Java Client and 9.2.2.x and 9.2.1.x Web Client only:

3. The search dialog allows you to search for any business object (for example, items or manufacturer parts) and select the attachments of those objects to use for the mockup.

Use any of the following search methods:

- **Search** tab lets you create a simple search or an advanced search. You can check to search attachment contents, too.
- **Saved Searches** tab opens to your navigation pane where you can browse in search folders, select a search, and run it. Again, returned results may be moved to the **Selected Items** table, and click **OK**.
- **Shortcuts** tab opens to your navigation pane where you can select objects from **My Bookmarks** or **Recently Visited**. The system displays shortcuts to only those objects that are appropriate to the operation you are performing.

Only business objects with attached files appear in the search results table. For example, a business object that you viewed recently will not appear on the Recently Visited list of the Shortcuts tab if it has no attachments.

4. When the results of your search are returned, select a row in the Results table, and the related files for that object appear in the Related Files table.
5. In the Related Files table, select and move attachments to the Selected Files table.
6. You can continue to run multiple searches or shortcuts until you are finished selecting the attachments you want.
7. When you are finished, click **OK**.

The files are loaded into the same AutoVue for Agile workspace.

8. Manipulate the models using the viewer features including the features in the **Analysis** menu, for example User Defined Coordinate Systems, Manipulators, Interference Checking, and Part Alignment.

For information about these features, refer to the viewer online help. Choose **Help > Contents** in the AutoVue for Agile menu bar.

Modified and Unavailable Viewer Features

This chapter includes the following:

▪ User Interface Modifications	45
▪ File Storage and Management Modifications	45
▪ Opening Files Features	46
▪ Working with Hyperlinks	46
▪ Viewer Modes	46

User Interface Modifications

The following features described in the viewer online Help have been modified or have been suppressed and are not available.

- **Window** menu and its options for viewing multiple files (**New**, **Cascade**, **Tile Horizontally**, and **Tile Vertically**) are not available.
- The ability to click and drag toolbars to move them is not available.
- Mnemonic letter shortcuts (ALT+letter) are not available and are not displayed as underlined letters in the menus.
- Tooltips Quick Menu is not available.
- The **Customize > Options** menu selection does not include toolbar and tooltip settings.

File Storage and Management Modifications

Because the Agile system manages and controls access to attached files and markups (redline files), the following features described in the viewer online Help may have been modified or are not available to you.

Many of these modifications relate to how files are opened, saved, and where they are stored. Instead of using viewer features (for example, **File > Open**, as described in the viewer online Help) to view files, the files are selected via the Agile object **Attachments** tab and the file folder **Files** tab, and retrieved from the file vault, part of Agile File Manager. The files are then displayed in the viewer window. When you create and save markup files, they are also saved in the file vault. (See [Opening Agile Attachment Files in AutoVue for Agile](#) on page 25 and [Guidelines for Marking Up or Redlining Attachments](#) on page 27.)

If you need more information about a viewer feature, see the viewer online Help. To view online Help, choose **Help > Content** in the AutoVue for Agile menu bar.

Opening Files Features

These features described in the viewer online Help are not available:

- Viewer Startup view (empty viewer window).
- Drag and drop files from Windows Explorer onto the viewer window to open them.
- The following viewer **File** menu selections are not available in AutoVue Electromechanical Pro: **Open**, **Browse**, **Next File**, **Previous File**, **Load File**, **Open URL**, and **Close**.
- Archive file directory displayed in viewer window.
- Import and Export Markup files feature is not available. Import and Export 3D Models is not available.

Access to all files, including markup files, is managed by the Agile system. For more information about markup files in Agile, see [Marking Up — How It Works](#) on page 27 and [Guidelines for Marking Up or Redlining Attachments](#) on page 27.

Working with Hyperlinks

Refer to the AutoVue for Agile online help for details about working with and creating hyperlinks. To view the online help, choose **Help > Contents** in the viewer menu bar.

Although you can create hyperlink markup entities, you cannot create hyperlinks to other files in the Agile file vault.

The purpose of this viewer feature is to gather or link related information together. This functionality is provided by Agile features such as **Attachments** tabs (which may have multiple attached file folder objects) and **Relationships** tabs. For more information about file folder objects and attachments see *Getting Started with Agile PLM*.

Viewer Modes

The viewer modes Startup View and Thumbnails Mode described in the online Help are not available.

This chapter includes the following:

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▪ Headers/Footers Group in Print Properties	47
▪ Watermarks and Banners in Print Properties	48
▪ Stamps Group in Print Properties	49
▪ Printing DGN Files	49

Printing Documents from within the Viewer

For detailed information about printing attachments from the file folder object **Files** tab, see the *Getting Started with Agile PLM* manual, Chapter 9, "Working with Attachments", and Chapter 10, "Working with File Folders."

For detailed information about printing from the viewer, see the viewer online Help. To view online Help, choose **Help > Content** in the AutoVue for Agile menu bar.

For information about how the Agile administrator can customize the AutoVue for Agile print options, see [Viewer Administration Tasks](#) on page 51.

The following sections describe print features that have been modified to integrate the viewer with the Agile system.

Headers/Footers Group in Print Properties

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

Note These settings are maintained and modified by your Agile administrator.

To view the header and footer settings:

Select the **Headers/Footers** tab.

A literal percentage mark is indicated by %%. Other codes are as follows:

- %f = full path of document (for example, D:\PICS\TIFF\CTROK.TIF)
- %v = document drive
- %d = document directory (for example, D:\PICS\TIFF)
- %b = document base name (for example, CTROK)
- %e = document file extension (for example, TIF)

- %n = total number of document pages
- %p = current page number
- %N = total number of tiled pages
- %P = current tile number
- %r = newline
- %F = Excel native print settings
- %Y = date: year
- %M = date: month
- %D = date: day
- %W = date: day of week
- %H = time: hour
- %U = time: minute
- %S = time: second

Watermarks and Banners in Print Properties

The Print Properties dialog box includes a **Watermark** tab. This tab cannot be modified in the AutoVue for Agile Print Properties dialog box.

Watermark and Banner settings are defined and maintained in Agile Administrator. The Agile Administrator watermark and banner settings determine whether banners and watermarks appear on printouts of files attached to Agile objects and the content of those banners and watermarks. These banners and watermarks appear on files printed with AutoVue for Agile.

Watermarks on attachments are inserted under the file. Therefore, file types that are in “solid” formats (for example, PDF, BMP) will not show the watermark. It will show only on “transparent” file types (for example, CAD).

Watermarks

A faint and transparent watermark appears on the current document’s contents.

Note	For high resolution black and white printing, the transparent watermark is printed on the current document’s contents. For low resolution black and white printing, the watermark is printed on the current document’s contents, but it is not transparent.
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The watermark settings are maintained and modified by your Agile administrator; see the *Administrator Guide*. For more information, see [Viewer Administration Tasks](#) on page 51.

Stamps Group in Print Properties

Note This feature is not available in this implementation of AutoVue for Agile.

Printing DGN Files

AutoVue for Agile can be configured to print files with a DGN extension in the same manner as MicroStation. This option must be configured on the server side; please contact your Agile system administrator for assistance.

Viewer Administration Tasks

This chapter includes the following:

▪ Setting the Print Options.....	51
▪ Adding Fonts.....	53
▪ Viewing Excel Files.....	53

Note For information about Agile PLM Administrator settings related to AutoVue for Agile (for example, **Supported File** and **Valid Model File Type** settings), see *Administrator Guide*, “Viewer and Files” section of the “General System Settings” chapter.

Setting the Print Options

Some file formats require configuring specific print settings to print properly. In general, you can change these settings for all users or for individual users:

- To change the print settings for all users, you need to modify some of the parameters in the AVS\bin\allusers.ini file.
- To change the print settings for individual users, you need to modify some of the parameters in *each* user's .ini file under AVS\bin\profiles.

Caution When you modify options in the allusers.ini file, the existing user profiles are not automatically modified. Because editing every individual user profile is impractical, in the procedures below you are instructed to delete the existing user profiles when you modify allusers.ini. The next time a user opens AutoVue for Agile, a new user profile is created which includes the new allusers.ini options settings. You may want to notify your users in advance to let them know that their user profiles will be reset.

To change the way that the watermark, border, and header (banner) appear when printed, you will need to modify the following .ini file parameters:

- [OPTIONS] – HPBACKGROUND, KEEPORIGINALCOLORS, and SWSHOWVIEWPORTBORDER
- [PRINTWATERMARK] – FONTNAME, FONTSIZE, ORIENTATION, and FONTSTYLE
- [PRINTHEADERS] – FONTNAME, FONTSIZE, ORIENTATION, and FONTSTYLE

The following sections describe the procedures for printing watermarks and borders, and for modifying the headers and watermarks.

Printing Watermarks in .hpg and .plt Files

To print watermarks correctly in .hpg and .plt files, you must set the background color correctly.

Note If the watermark image or the color used in the watermark image is not transparent, the watermark will not be visible.

To set the background color:

1. Shut down the JVue server.
2. On the drive where the AutoVue for Agile Server is installed, find the AVS\bin\Profiles folder.
3. Delete all the user profiles in this folder (Example: John Smith.ini).
4. Edit the allusers.ini file (AVS\bin\allusers.ini).
5. In the [OPTIONS] section, add or update the following two lines:

HPBACKGROUND = 0

KEEPORIGINALCOLORS = 1

Printing Viewport Borders in SolidWorks Files

To print viewport borders correctly in SolidWorks files, you must enable the viewing/printing of viewport borders.

To enable the option:

1. Shut down the JVue server.
2. On the drive where the AutoVue for Agile Server is installed, find the AVS\bin\Profiles folder.
3. Delete all the user profiles in this folder (Example: John Smith.ini).
4. Edit the allusers.ini file (AVS\bin\allusers.ini).
5. In the [OPTIONS] section, add or update the following line:

SWSHOWVIEWPORTBORDER = 1

Modifying the Header and Watermark Font Settings

Note The watermark may be truncated if the font size is too large or if there are too many characters in the watermark text. Truncation ensures that the watermark does not distort the image.

To set the watermark font size:

1. Shut down the JVue server.
2. On the drive where the AutoVue for Agile Server is installed, find the AVS\bin\Profiles folder.
3. Delete all the user profiles in this folder (Example: John Smith.ini).
4. Edit the allusers.ini file (AVS\bin\allusers.ini).

5. In the **[PRINTHEADERS]** section and in the **[PRINTWATERMAK]** section, update the lines for Fontname, Fontsize, Orientation, and Fontstyle. For example:

FONTNAME = Serif

FONTSIZE = 24

ORIENTATION = 1

FONTSTYLE = 2

Note ORIENTATION can be specified as 1 (portrait) or 2 (landscape).

Adding Fonts

To ensure that specific fonts are recognized by AutoVue for Agile, you can add the font path to the allusers.ini configuration file.

To add fonts:

1. Shut down the JVUE server.
2. On the drive where the AutoVue for Agile Server is installed, find the AVS\bin\Profiles folder.
3. Delete all the user profiles in this folder (Example: John Smith.ini).
4. Edit the allusers.ini file (AVS\bin\allusers.ini).
5. In the **[OPTIONS]** section, update the following line:
XFONTPATHS = {paths}
6. Add the full paths of the font files to the line. Separate the paths with a semicolon.
7. Save the allusers.ini file.
8. Clear your web browser's cache.
9. Restart the JVUE server.

Viewing Excel Files

When viewing Excel files in AutoVue for Agile, the number of pages listed in the viewer status bar is the number of Excel worksheet and the AutoVue for Agile menu command **View > Page** selects a different Excel worksheet to view.

