



Agile Viewer Supplement

Release 9.2.1

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PREFACE

The Agile documentation set includes Adobe® Acrobat™ PDF files. The [Oracle Technology Network \(OTN\) Web site](#) contains the latest versions of the Oracle|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 Oracle|Agile Documentation folder available on your network from which you can access the Oracle|Agile documentation (PDF) files.

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 www.adobe.com.

The [Oracle Technology Network \(OTN\) Web site](#) can be accessed through **Help > Manuals** in both the Agile Web Client and the Agile Java Client. If applicable, earlier versions of Oracle|Agile PLM documentation can be found on the www.agile.com/support.

If you need additional assistance or information, please contact support@agile.com or phone (408) 284-3900 for assistance.

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

Readme

Any last-minute information about Oracle|Agile PLM can be found in the Readme file on the [Oracle Technology Network \(OTN\) Web site](#).

Agile Training Aids

Go to the [Agile Training Web page](#) for more information on Agile Training offerings.

CHAPTER 1

Introducing Agile Viewer

This chapter introduces Agile Viewer and provides basic information about it. Topics discussed include:

- ❑ *How to Use this Manual*
- ❑ *Getting Help*
- ❑ *About Agile Viewer*
- ❑ *What's New in This Release*
- ❑ *Understanding the Agile Viewer*

How to Use this Manual

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

The viewer 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.

Table 1-1: Where to find related information

Feature or concept	Contained in this document	How to find the document
Java Client navigation	<i>Getting Started with Agile PLM</i> , Chapter 2, "Navigation in Java Client"	Choose Help > Manuals in the Java Client or Web Client menu bar. On the documentation web page, click Getting Started Guide in the list of user manuals.
Web Client navigation	<i>Getting Started with Agile PLM</i> , Chapter 3, "Navigation in Web Client"	
Relationships and references between objects	<i>Getting Started with Agile PLM</i> , Chapter 5, "Working with Business Objects"	
Attachment files	<i>Getting Started with Agile PLM</i> , Chapter 9, "Working with Attachments" and Chapter 10, "Working with Files File Folders"	
Working with file folder objects		
File folder mass update		
Routing and reviewing file folders		
File validation (Handle Check Sum)		
Viewing and redlining attachment files		
Viewing and redlining file folder contents		
Redlining through ECOs, MCOs and SCOs	<i>Product Collaboration User Guide</i> , Chapter 5, "Changes"	Choose Help > Manuals in the Java Client or Web Client menu bar. On the documentation web page, click Product Collaboration in the list of user manuals.

Getting Help

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

Note See Chapter 2, “Agile-specific Features and Functions” for a complete list of features and user interface details described in the viewer online Help that have been modified in order to integrate the viewer with the Agile system.

About Agile Viewer

Agile Viewer 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 archive files can be listed and viewed without the need to decompress them. It isn't necessary for you to identify the file type; Agile Viewer 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 Files 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 Agile Viewer 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.

Some of Agile Viewer's features are:

- ❑ **Flexible user-defined objects** — Agile Viewer 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 Agile Viewer online help for a detailed discussion of markup objects. Choose **Help > Contents** in the Agile Viewer 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** — Agile Viewer works with many non-English languages, and has been tested on Japanese, Chinese, French, German, Hebrew, and Swedish operating systems.

What's New in This Release

The following new features have been added to this release:

- ❑ Support for AutoVue Professional and AutoVue Solid Model Professional, Version 19.
- ❑ Ad Hoc redline markups can be saved when performing cross probing, Compare, and Digital Mockup from the **Files** tab of file folder object.

Understanding the Agile Viewer

The following sections describe the main Agile Viewer window and performance modes, plus other information needed to use Agile Viewer.


Agile Viewer Window

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

To start the Agile Viewer in Java Client:

Double-click the attachment row.

Or


- 1 Select one or more rows.
- 2 Click the **View Files** 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 the Agile Viewer in Web Client:

Click the file name link in the table.

Or

- 1 Select one or more rows.
- 2 Click the **View Files** 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 Agile Viewer, the main Agile Viewer window appears, as shown in Figure 1-1 on page 1-4.

Note For more information about starting the Agile Viewer, see “Opening Agile Attachment Files in the Viewer” on page 2-1.

Viewing Multiple Files

You can select multiple files to view, and the Agile Viewer opens all the selected files in a single window. In the menu bar, choose **View > Multicontent** to select which file you want to view.

Agile Viewer Modes

Agile Viewer 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 Agile Viewer's default mode. Documents can be edited or marked up only from Markup mode, described in the next section.

Markup Mode

When Agile Viewer 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 Agile Viewer from the **Redline Attachments** tab or **Files** tab in a file folder object, Agile Viewer 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 Agile Viewer 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 2-2. When you open a markup file, Markup mode starts automatically.

Note Markup mode is available in the viewer 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.

Agile Viewer Window Components

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

Menu Bar

The menu bar 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’re performing.


Toolbars

The tool buttons 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’re 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 **red light bulb marker** indicates that the current active file has associated markup files. While in View mode, click the markup from the **File** 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.
- The **Join Session**  button, which indicates that you have been invited to join a Collaboration session.

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 Agile Viewer'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 **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

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 erased from the display.

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 describes Agile-specific viewer features and functions. Topics discussed include:

- ❑ *Opening Agile Attachment Files in the Viewer*
- ❑ *Marking Up — How It Works*
- ❑ *Guidelines for Marking Up or Redlining Attachments*
- ❑ *Marking Up Documents*
- ❑ *2D Features and Functions*
- ❑ *EDA Features and Functions*
- ❑ *3D Features and Functions*
- ❑ *Cross Probing*
- ❑ *Comparing Files*
- ❑ *Overlaying Files*
- ❑ *Working with Schematic and PCB Files*
- ❑ *Real-Time Collaboration*
- ❑ *Digital Mockup*

Opening Agile Attachment Files in the Viewer

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

To view a file from Java Client:

- ❑ Go to the **Attachments** tab of a business object that references the file and:
 - Double-click the attachment row.
 - Or
 - Select one or more attachment rows and click the **View Files** button's drop-down arrow and select **View**  from the menu. If the **View**  icon is visible on the button, you can simply click the button.
- ❑ Go to the **Files** tab of a file folder object containing the file, select one or more file rows and
 - Click the **View Files** button's drop-down arrow and select **View**  from the menu. If the **View**  icon is visible on the button, you can simply click the button.

To view a file from Web Client:

- ❑ Go to the **Attachments** tab of a business object that references the file and click the file name link in the attachments table.

- Go to the **Files** tab of a file folder object containing the file and click the filename link in the file table, or select one or more file rows and click the **View** button in the tab menu.

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 2-4).

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 Agile Viewer, your original document remains unchanged because your markups are saved in separate markup files. When you view a markup file, Agile Viewer 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 (AFM). 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 *Getting Started with Agile PLM*.

Java Client

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.

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 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.

2 On the **Redline Attachments** tab:

- Select the row containing the file you want to redline and click the **View** button.

Or

- Double-click the row containing the file you want to redline.

3 When the Agile Viewer appears, click the **Markup** button. (This button is available only when markups are allowed.)

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.

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 Double-click the row containing the file you want to redline.

2 When the Agile Viewer appears, click the **Markup** button. (This button is available only when markups are allowed.)

3 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.

Web Client

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 . Click either  or  to initiate redlining.



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 **Redline Attachments** tab, click the **Do Redlining** button  (or **Has been redlined** button ) on the row of the file you want to redline. (This button is available only when markups are allowed.)

3 On the **Affected Items** tab, click the **Do Redlining** icon next to the item to open the Redlines page.

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.

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** button  (or **Has been redlined** button ) on the row of the file you want to redline. (This button 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 orders's **Redline Attachments** tab or from the pending revision item **Attachments** tab.

Important 3D features and access to 3D files are available only with Agile Advanced Viewer. Features for schematic and PCB files, also referred to as EDA files, are available only with the Agile Advanced Viewer. In order to use these features, your company must have the View and Mark Up (3D) server license, which provides access to Advanced Viewer functions. For more information about server licenses, see the *Administrator Guide*. Contact your Agile Account Executive or reseller to obtain a license.


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 **View Files**  button.
- In Web Client, click the **Has been redlined** button 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, double-click the **Has been redlined**  button.

To view the redlines of previous versions in Web Client:

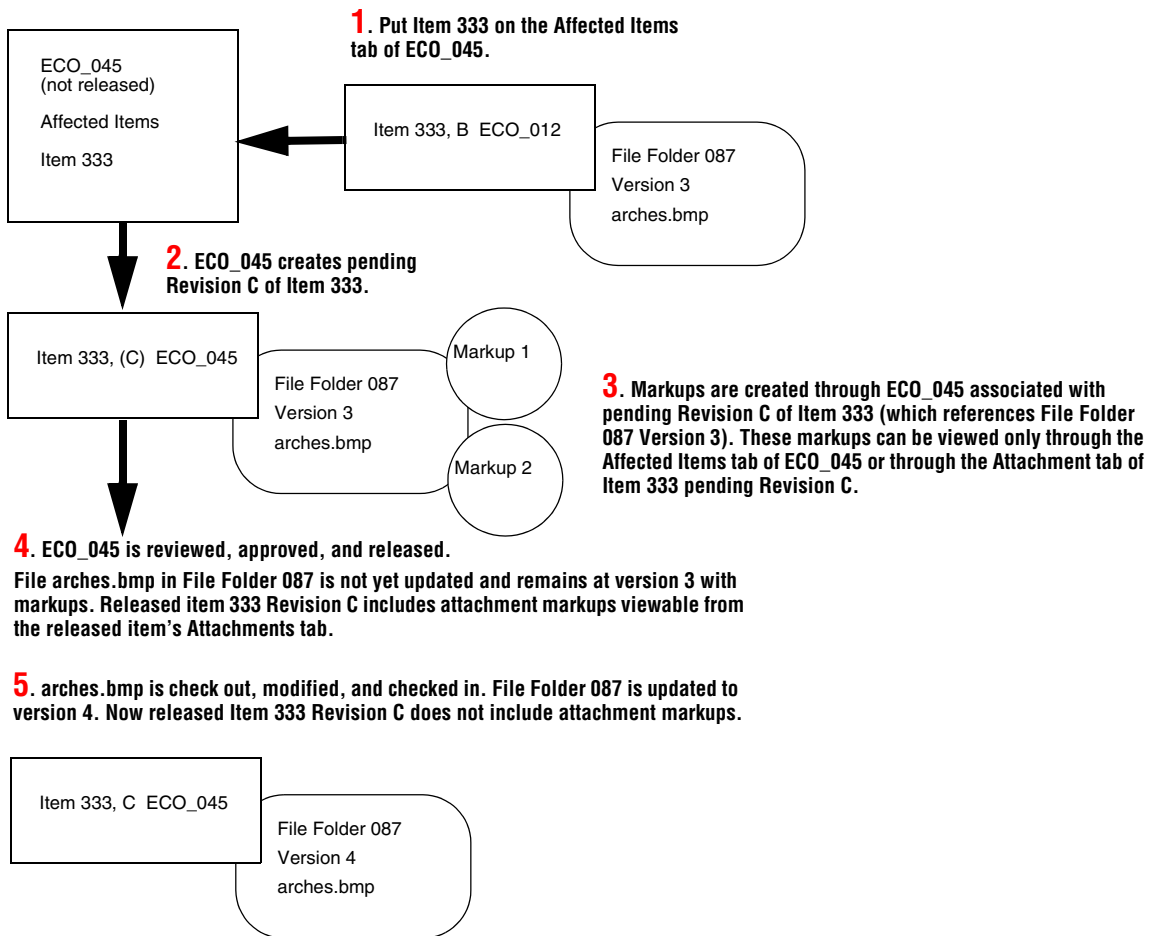
- 1 On the **Attachments** tab of the pending revision, click the **Show Versions** button in the row you want to view. The Versions dialog appears.
- 2 On the version row for which you want to view redlines, double-click the **Has been redlined**  button.

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*.)

Figure 2-1: Change order redline markup flow chart



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_45. 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 Agile Viewer menu bar.

Tips for Marking Up Documents

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

Attaching Information to Markup Files

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

Entity Rotate

Entity 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 Entity** button, or choose **Markup > Entity Rotate**.
When this feature is activated, the **Rotate Entity** 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 Agile Viewer menu bar.

EDA Features and Functions

Agile Advanced Viewer 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 2-7).
- 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 Agile Viewer menu bar.

Important EDA features and access to EDA files are available only with Agile Advanced Viewer. In order to use these features, your company must have the View and Mark Up (3D) server license, which provides access to Advanced Viewer functions. For more information about server licenses, see the *Administrator Guide*. Contact your Agile Account Executive or reseller to obtain a license.

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 Agile Viewer menu bar.

Important 3D features and access to 3D files are available only with Agile Advanced Viewer. In order to use these features, your company must have the View and Mark Up (3D) server license, which provides access to Advanced Viewer functions. For more information about server licenses, see the *Administrator Guide*. Contact your Agile Account Executive or reseller to obtain a license.

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. 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 to the **References** 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.

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 Agile Viewer online help. Choose **Help > Contents** in the viewer menu bar.

Important Cross probing features are available only with Agile Advanced Viewer. In order to use these features, your company must have the View and Mark Up (3D) server license, which provides access to Advanced Viewer functions. For more information about server licenses, see the *Administrator Guide*. Contact your Agile Account Executive or reseller to obtain a license.

Use cross probing to interrogate ECAD schematic and layout files in separate viewer windows. You can make markups in the files as described in "Saving Cross Probing Markups" below.


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.

Saving Cross Probing Markups

When you initiate cross probing from the file folder object **Files** tab, you can make markups in the files in any of the opened windows and save them. The marked up file attachments can be identified in the file folder object **Files** tab by the **Has been redlined** icon  in its row in the table. This feature can be used only with ECAD files.

The following rules apply to creating cross probing markups:

- ❑ You must have the appropriate privilege to create the redline markups:
 - Attachment Redlines for Self privilege mask for file folders.
- ❑ The cross probe viewing operation has been initiated from the **Files** tab of a checked-in file folder.
- ❑ For cross probe markups, the markup is associated to the file in the opened viewer window where it is created. For example, when you cross probe between a PCB file and a schematic file, a viewer window opens for each file. You can cross probe from either open viewer window. In addition, you can create a markup in either open viewer window. If you create and save a markup on the PCB file, the markup is associated only to the PCB file.
- ❑ The cross probe session is not saved in the markup file. When you view a file that has associated cross probe markups, the Agile viewer does *not* automatically enter cross probe mode.

Cross Probing in Java Client

To run Cross Probing in Java Client:

- 1 Display the **Attachments** tab or the **Files** tab.
- 2 Select both file rows you want to work with and choose **View Files > Cross Probe**.

Each file is displayed in a separate viewer window.

- 3 Begin cross probing.

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

To run Cross Probing By Search in Java Client:

- 1 Display the **Attachments** tab or the **Files** tab.
- 2 Select a file row you want to work with and choose **View Files > By Search > Cross Probe**.

The Select Files dialog appears, with three Search tabs.

- 3 This 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.

You can continue to run multiple searches or shortcuts until you are finished selecting the attachments you want.
- 6 When you are finished, click **OK**.

Each file is displayed in a separate viewer window.

- 7 Begin cross probing.

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

Cross Probing in Web Client

To run Cross Probing in Web Client:

- 1 Display the **Attachments** tab or the **Files** tab.
- 2 Select both file rows you want to work with and choose **View > Cross Probe**.
Each file is displayed in a separate viewer window.
- 3 Begin cross probing.
See Agile Viewer online help for more information about cross probing. Choose **Help > Contents** in the Agile Viewer menu bar.

To run Cross Probing By Search in Web Client:

- 1 Display the **Attachments** tab or the **Files** tab.
- 2 Select a file row you want to work with and choose **View > By Search > Cross Probe**.
The View Files by Search dialog appears, with three Search tabs.
- 3 This 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 Files 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.
You can continue to run multiple searches or shortcuts until you are finished selecting the attachments you want.
- 6 When you are finished, click **OK**.
Each file is displayed in a separate viewer window.
- 7 Begin cross probing.
See Agile Viewer online help for more information about cross probing. Choose **Help > Contents** in the Agile Viewer menu bar.

Comparing Files

Comparing 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 comparison features, see the Agile Viewer online help. Choose **Help > Contents** in the viewer menu bar.

Important Compare file features are available only with Agile Advanced Viewer. In order to use these features, your company must have the View and Mark Up (3D) server license, which provides access to Advanced Viewer functions. For more information about server licenses, see the *Administrator Guide*. Contact your Agile Account Executive or reseller to obtain a license.

Markups and Comparing Files

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

Comparing Files in Java Client

To initiate comparing files in Java Client:

- 1 Display the **Attachments** tab or the **Files** tab.
- 2 Select both file rows you want to work with and choose **View Files > 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 viewer menu bar.

To initiate comparing files By Search in Java Client:

- 1 Display the **Attachments** tab or the **Files** tab.
- 2 Select a file row you want to work with and choose **View Files > By Search > Compare**.

The Select Files dialog appears, with three Search tabs.

- 3 This 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 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 and move attachments to the Selected Files table.

You can continue to run multiple searches or shortcuts until you are finished selecting the attachments you want.
- 6 When you are finished, click **OK**.

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 viewer menu bar.

Comparing Files in Web Client

To initiate comparing files in Web Client:

- 1 Display the **Attachments** tab or the **Files** tab.
- 2 Select both file rows you want to work with and choose **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 viewer menu bar.

To initiate comparing files By Search in Web Client:

- 1 Display the **Attachments** tab or the **Files** tab.
- 2 Select a file row you want to work with and choose **View > By Search > Compare**.

The View Files by Search dialog appears, with three Search tabs.

3 This 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 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 Files 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.

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

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


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 viewer 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 Agile Viewer online help. Choose **Help > Contents** in the viewer menu bar.

Important Overlaying files features are available only with Agile Advanced Viewer. In order to use these features, your company must have the View and Mark Up (3D) server license, which provides access to Advanced Viewer functions. For more information about server licenses, see the *Administrator Guide*. Contact your Agile Account Executive or reseller to obtain a license.

Saving File Overlay Markups

You can create markups in the file that was opened first when you initiated viewing in overlay mode. The marked up file attachments can be identified by the **Has been redlined** icon  in its table row on the file folder object **Files** tab. This feature can be used only with ECAD files.

The following rules apply to creating overlay markups:

- You must have the appropriate privilege to create the redline markups:
 - Attachment Redlines for Self privilege mask for file folders.
- The overlay viewing operation has been initiated from the **Files** tab of a checked-in file folder.
- For overlay markups, the markup is associated to the file that was opened first.

For example, when you overlay File A1 and File B2, regardless of which file you selected first, if File B2 was the first file that was opened (displayed in the viewer window), then any markups you create and save are associated with File BB.
- The overlay session is not saved in the markup file. When you view a file that has associated overlay markups, the Agile viewer does *not* automatically enter overlay mode.

Overlaying Files in Java Client

To initiate overlaying files in Java Client:

- 1 Display the **Attachments** tab or the **Files** tab.
- 2 Select both file rows you want to work with and choose **View Files > 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 viewer menu bar.

To initiate overlaying files By Search in Java Client:

- 1 Display the **Attachments** tab or the **Files** tab.
- 2 Select a file row you want to work with and choose **View Files > By Search > Overlay**.

The Select Files dialog appears, with three Search tabs.

- 3 This 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.
You can continue to run multiple searches or shortcuts until you are finished selecting the attachments you want.
- 6 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, **Analysis > Overlays** in the menu bar) and options, choose **Help > Contents** in the viewer menu bar.

Overlaying Files in Web Client

To initiate overlaying files in Web Client:

- 1 Display the **Attachments** tab or the **Files** tab.
- 2 Select both file rows you want to work with and choose **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 viewer menu bar.

To initiate overlaying files By Search in Web Client:

- 1 Display the **Attachments** tab or the **Files** tab.
- 2 Select a file row you want to work with and choose **View > By Search > Overlay**.

The View Files by Search dialog appears, with three Search tabs.

- 3 This 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 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 Files 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.

You can continue to run multiple searches or shortcuts until you are finished selecting the attachments you want.
- 6 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 > Overlays** in the menu bar) and options, choose **Help > Contents** in the viewer 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 the Agile Advanced Viewer. In order to use these features, your company must have the View and Mark Up (3D) server license, which provides access to Advanced Viewer functions. For more information about server licenses, see the *Administrator Guide*. Contact your Agile Account Executive or reseller to obtain a license.

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

Real-Time Collaboration

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

Important Real-time collaboration features are available only with Agile Advanced Viewer. In order to use these features, your company must have the View and Mark Up (3D) server license, which provides access to Advanced Viewer functions. For more information about server licenses, see the *Administrator Guide*. Contact your Agile Account Executive or reseller to obtain a license.

Overview of Collaboration Sessions

The Collaboration 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 Collaboration feature is available to all users who have Agile Discovery, Read, and Attachment Redlines privileges.

From the **Collaboration** 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, *before* you attempt to initiate the Collaboration session.

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 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 Collaboration 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 Agile Viewer server to use the collaboration feature.

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.

To initiate Digital Mockup of files in Java Client:


- 1 Display the **Attachments** tab or the **Files** tab.
- 2 Select all the file rows you want to work with and choose **View Files > Digital Mockup**.

The files are loaded into the same Agile Viewer workspace.

- 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 Agile Viewer menu bar.

Saving Digital Mockup Markups

You can make markups in the file that was opened first when you initiated viewing in Digital Mockup mode. The marked up file attachments can be identified by the **Has been redlined** icon  in its table row on the file folder object **Files** tab. This feature can be used only with ECAD files.

The following rules apply to creating Digital Mockup markups:

- You must have the appropriate privilege to create the redline markups:
 - Attachment Redlines for Self privilege mask for file folders.
- The Digital Mockup viewing operation has been initiated from the **Files** tab of a checked-in file folder.
- For Digital Mockup markups, the markup is associated to the file that was opened first.

For example, when you mockup File A1, File B2, and File C3, regardless of which file you selected first, if File B2 was the first file that was opened (displayed in the viewer window), then any markups you create and save are associated with File B2.
- The Digital Mockup markup file includes information about how to fetch all the files used in the DMU session.

When you view a file that has associated DMU markups, the Agile viewer automatically enters DMU mode when the DMU markup is opened. The DMU session is automatically recreated.

Digital Mockup in Java Client

To initiate Digital Mockup of files By Search in Java Client:

- 1 Display the **Attachments** tab or the **Files** tab.
- 2 Select a file row you want to work with and choose **View Files > By Search > Digital Mockup**.

The Select Files dialog appears, with three Search tabs.
- 3 This 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.
You can continue to run multiple searches or shortcuts until you are finished selecting the attachments you want.
- 6 When you are finished, click **OK**.
The files are loaded into the same Agile Viewer workspace.
- 7 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 Agile Viewer menu bar.

Digital Mockup in Web Client

To initiate Digital Mockup of files in Web Client:

- 1 Display the **Attachments** tab or the **Files** tab.
- 2 Select all the file rows you want to work with and choose **View > Digital Mockup**.
The files are loaded into the same Agile Viewer workspace.
- 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 Agile Viewer menu bar.

To initiate Digital Mockup of files By Search in Web Client:

- 1 Display the **Attachments** tab or the **Files** tab.
- 2 Select a file row you want to work with and choose **View > By Search > Digital Mockup**.
The View Files by Search dialog appears, with three Search tabs.
- 3 This 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 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 Files 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.
You can continue to run multiple searches or shortcuts until you are finished selecting the attachments you want.
- 6 When you are finished, click **OK**.

The files are loaded into the same Agile Viewer workspace.

- 7 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 Agile Viewer menu bar.

Modified and Unavailable Viewer Features

This chapter describes features and user interface elements described in the viewer online help that have been modified in order to seamlessly integrate the viewer with the Agile system. Some features are unavailable. Topics discussed include:

- ❑ *User Interface Modifications*
 - ❑ *File Storage and Management Modifications*
 - ❑ *Opening Files Features*
 - ❑ *Working with Hyperlinks*
 - ❑ *Viewer Modes*
-

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. (See “Viewing Multiple Files” on page 1-3.)
- ❑ 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 (AFM). 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 the Viewer” on page 2-1 and “Guidelines for Marking Up or Redlining Attachments” on page 2-2.)

If you need more information about a viewer feature, see the viewer online Help. To view online Help, choose **Help > Content** in the 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 the Agile Advanced Viewer: **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 2-2 and “Guidelines for Marking Up or Redlining Attachments” on page 2-2.

Working with Hyperlinks

Refer to the Agile Viewer 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 in Agile PLM*.

Viewer Modes

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

CHAPTER 4

Printing

This chapter describes viewer print features that have been modified for use in Agile. Topics discussed include:

- ❑ *Printing Documents from within the Agile Viewer*
 - ❑ *Print Preview*
 - ❑ *Headers/Footers Group in Print Properties*
 - ❑ *Watermarks and Banners in Print Properties*
 - ❑ *Stamps Group In Print Properties*
 - ❑ *Printing DGN Files*
-

Printing Documents from within the Agile 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 viewer menu bar.

For information about how the Agile administrator can customize the Agile Viewer print options. see Chapter 5, "Viewer Administration Tasks."

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

Print Preview

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

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 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 Agile Viewer 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 the Agile Viewer.

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.

The watermark settings are maintained and modified by your Agile administrator; see the *Administrator Guide*. For more information, see Chapter 5 of this manual, “Viewer Administration Tasks.”

Stamps Group In Print Properties

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

Printing DGN Files

Agile Viewer 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 describes how the Agile administrator or the system administrator can customize the Agile Viewer print options.

- *Setting the Print Options*
 - *Adding Fonts*
-

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

For more information about the Agile View Server, including where to find additional Agile View Server documentation, see the appropriate Agile installation guide for your Agile PLM system; refer the chapter about configuring the Agile View Server. See also “The Agile documentation set includes Adobe® Acrobat™ PDF files. The Oracle Technology Network (OTN) Web site contains the latest versions of the Oracle|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 Oracle|Agile Documentation folder available on your network from which you can access the Oracle|Agile documentation (PDF) files.” on page -vii of this manual.

Setting the Print Options

Some file formats require configuring specific 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 the Agile Viewer, 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 Agile Viewer 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 Agile Viewer 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 Agile Viewer 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 the Agile Viewer, 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 Agile Viewer 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 the Agile Viewer, all pages may not be displayed. View the file in its native application to verify the correct number of pages in the file.

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