Oracle AutoVue VueLink 20.0 for Oracle UCM

System Administrator Manual

An Integration between Oracle Universal Content Management and Oracle AutoVue, Client/Server Deployment

Contents

1 Preface

The *Oracle AutoVue VueLink 20.0 for Oracle UCM System Administrator Manual* describes the installation and configuration steps for the VueLink.

For the most up-to-date version of this document, go to the AutoVue Documentation Web site on the Oracle Technology Network at **http://www.oracle.com/technetwork/documentation/autovue-091442.html**.

1.1 Audience

The *Oracle AutoVue VueLink 20.0 for Oracle UCM System Administrator Manual* is intended for third-party developers who want to integrate their UCM system with the AutoVue Web Version family of products.

1.2 Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible to all users, including users that are disabled. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at `http://www.oracle.com/accessibility/`.

1.2.1 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.

1.2.2 Accessibility of Links to External Web Sites in Documentation

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1.3 Related Documents

For more information, refer to the following documents:

- *User Manual*
- *Developer's Guide*
- *Release Notes*

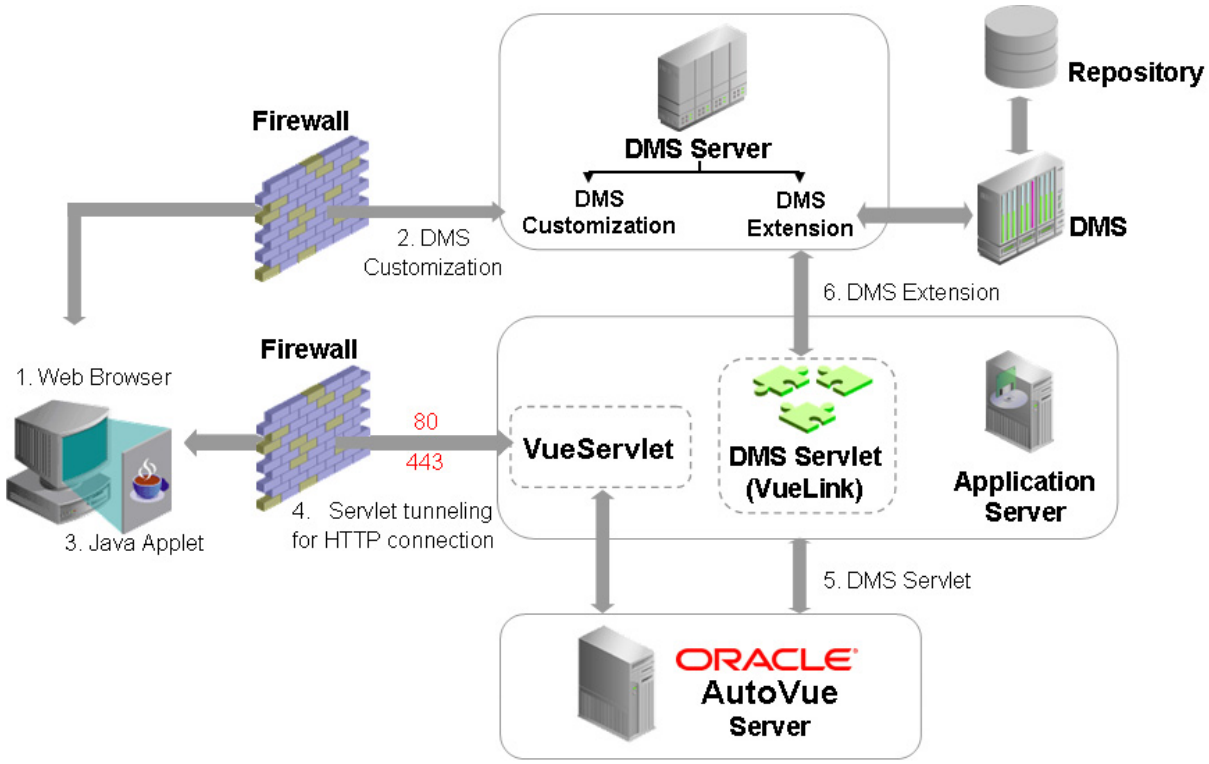
1.4 Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in the text.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

2 Introduction

The Oracle AutoVue VueLink for Oracle UCM[1] Servlet allows AutoVue to communicate with Oracle Universal Content Management (UCM) using standard HTTP protocol. The following diagram and steps describe a typical configuration of how AutoVue integrates with UCM (DMS Server in the diagram).



1 Log onto the DMS through a Web browser.

2 With DMS customization in place, a link for the viewer appears next to each file stored in the DMS.

3 When you click this link, the AutoVue client is launched and you may view that file inside the Web browser window.

4 Depending on AutoVue's configuration, the AutoVue client communicates with the AutoVue server either through *servlet tunnelling for HTTP connection* or through *direct socket connection*.

5 The AutoVue server communicates with the VueLink Servlet (DMS Servlet in the diagram) using a standard HTTP connection.

6 With DMS Extension installed on the server, the DMS Servlet can communicate with the DMS to handle any request made by the AutoVue server such as file "fetching."
For example, a DMS extension consists of the dependent components of the DMS Servlet that act as a bridge between the AutoVue server and the backend DMS.

Note: In addition to using a standard HTTP connection, the AutoVue client and AutoVue server may also use an HTTPS connection.

To display a composite file (a file with external references), the VueLink Servlet retrieves the file along with all its component files from the DMS and makes them available to the AutoVue server. Then AutoVue processes them and the AutoVue client displays the composite file. From here you can redline the file, create new Markups, save Markups into DMS and open Markups from DMS.

1. In this document, *Oracle AutoVue VueLink for Oracle UCM* is also referred to as *VueLink*.

3 System Requirements

- Oracle AutoVue, Client/Server Deployment 20.0
- Oracle Universal Content Management (UCM) server 11gR1 (11.1.1.3.0) with Oracle patch 9725318 on one of the following:
  - Windows 2008 SP2 (32-bit)
  - Oracle Enterprise Linux 5 (UL3)
- Oracle Content Integration Suite 11gR1 (11.1.1.3.0) with Oracle patch 9725318
  - For customers licensing Oracle AutoVue VueLink Integration - Oracle Universal Content Management: Limited use of the Content Integration Suite (CIS) functionality of Oracle Universal Content Management Enterprise Edition, limited to use with Oracle AutoVue VueLink Integration - Oracle Universal Content Management.
- Application Server/Servlet Engine

  Generally, VueLink should work with any application server/servlet engine. The following are certified:

  - Oracle WebLogic Server 11gR1 (10.3.3+)

Note: The VueLink will also work with adaptors for UCM such as WebCenter, EBS, Peoplesoft, and so on. Refer to the documentation for these adaptors for additional information.

4 Installation Prerequisites

Before integrating AutoVue with Oracle UCM, ensure UCM, Oracle AutoVue, Client/Server Deployment, and the application server are properly installed and configured on your system according to the manufacturer's instructions. It is recommended to test both UCM and AutoVue independently to verify that the installation has been successful and that all functions are available and produce the expected results.

5 Manual Installation

This section describes the steps necessary to install the VueLink manually. In order for Oracle AutoVue, Client/ Server Deployment and UCM to work properly, you must perform the following steps in the order listed:

1 "Unpacking Oracle AutoVue VueLink for Oracle UCM"
2 "Configuring VueLink"
3 "Installing the CIS Client"
4 "Deploying the VueLink Web Application"
5 "Customizing UCM"
6 "Adding a Markup Schema"
7 "Optional Configurations"
8 "Upgrading to a Newer Version of VueLink"
9 "HTTPS/SSL Deployment"

The following sections explain these steps in further detail.

5.1 Unpacking Oracle AutoVue VueLink for Oracle UCM

From the media pack, unzip **VLForUCM.zip**.

5.2 Configuring VueLink

The following sections explain how to configure VueLink.

5.2.1 Updating adapterconfig.xml

This section describes how to edit adapterconfig.xml so that the VueLink is able to connect to UCM.

1 In a text editor such as Notepad, browse to the <VueLink Unzip Folder>\Vuelink_war\vuelink\WEB-INF\lib folder and open adapterconfig.xml.
2 Perform a search in adpaterconfig.xml for the “host” and replace it’s property value with the host name where UCM is installed.

Note: Verify that the port specified matches the one specified on the UCM server in the *config.cfg* file on the server.

For example:

```
<?xml version="1.0" ?>
<config>
<adapter default="true" name="myadapter">
<config>
<property name="port">4444</property>
<property name="host">localhost</property>
<property name="type">socket</property>
</config>
<beans template="classpath:/META-INF/resources/
adapter/adapter-services-scs.jxml"/>
</adapter>
</config>
```

3 Save and close the text editor.

5.2.2 Updating config.cfg

This section describes how to edit config.cfg so that UCM can receive requests from the VueLink machine.

1 In a text editor such as Notepad, browse to the <UCM installation>\server\config folder and open config.cfg.

2 Perform a search in config.cfg for `SocketHostAddressSecurityFilter`. The result will display with list of IP addresses assigned to it.

3 Add to this list the IP address of the machine where VueLink is installed.

Note: Use the "|" character to separate the IP addresses.

For example:

```
SocketHostAddressSecurityFilter=127.0.0.1|10.26.1.171|
10.26.6.47
```

4 Save and close the text editor.

5.2.3 Updating autovue_environment.cfg

This section describes how to update autovue_environment.cfg so that UCM is able to communicate with VueLink when it is installed on another machine.

Note: Skip this update if the VueLink is deployed on the same application server as UCM (recommended), and is running on port 7001.

1 In a text editor such as Notepad, browse to the <UCM installation>\server\custom\AutoVue folder and open autovue_environment.cfg.

2 In autovue_environment.cfg, perform a search for the following:

- **VueLinkPort**: Set it to the port number where Application is running.
- **VueLinkHostName**: Set it to the host name where Application is running.
- **VueLinkContext**: Set it to the context name that VueLink is deployed.

For example:.

```
VueLinkPort=7001
VueLinkHostName=avserver
VueLinkContext=vuelink
```

3 Save and close the text editor.

Note: As of VueLink 20.0, the AutoVue address (host/port) is stored inside web.xml as part of the VueServlet configuration. AutoVue socket connection entries that were stored inside *autovue_environment.cfg* are no longer supported.

5.2.4 Updating web.xml

This section describes how to update web.xml in order to configure settings in the VueLink. For example, you can set verbosity, the AutoVue server host name, UCM search criteria, and so on.

1 In a text or XML editor, open the web.xml file located in the <VueLink Unzip Folder>\Vuelink_war\vuelink\WEB-INF directory.

2 Locate the JVueServer parameter under the VueServlet initialization parameters section.

3 In this section, perform the following specify the host name of the machine that the AutoVue server is running on and the port that AutoVue is listening to for connection. These values must be specified in the following format:

`hostname:port`

The default value for the AutoVue port is 5099. It must be the same as the *jvueserver.socket.port* parameter inside *jvueserver.properties* in the AutoVue bin directory.

For Example:

```
<init-param>
<param-name>JVueServer</param-name>
<param-value>AutoVueMachineName:5099</param-value>
</init-param>
<init-param>
```

Note: The vuelink.properties file no longer exists. It has been consolidated into the web.xml file.

The rest of the parameters inside web.xml are preconfigured based on the VueLink package.The following table contains brief descriptions of these parameters:

Property	Description	Default
UCM/CIS Parameters **Note:** These parameters should not be changed if you are not changing the packaging of VueLink Web application.		
UCPM_Mode	Client connection mode to UCM. Used internally be CIS (should not be modified) **Note:** This parameter should not be changed if you are not changing the packaging of VueLink Web application.	Standalone
UCPM_AdapterConfigXml	Path to CIS configuration file to UCM.	\WEB-INF\lib\adapterconfig.xml

Property	Description	Default
UCPM_InitializationProperties	Optional initialization string for CIS. Currently not used in VueLink.	
VueLink Logging Parameters		
log4jInitFile	Settings file used by VueLink logging tool (log4j).	\WEB-INF\lib\log4j.properties
Markup Parameters		
CSI_IntellistampDefLocation	Specify the location of the Intellistamp definition file which is either the relative path to the Web application or absolute path to a local file. For more information on Intellistamp configuration, refer to the Intellistamp section. Syntax: CSI_IntellistampDefLocation =\WEB-INF\lib\dmstamps.ini or c:temp\dmstamps.ini For more information on configuring Intellistamp, refer to **"Configuring Intellistamp"**.	
CSI_MarkupPolicyDefLocation	The location of the Markup Policy file which is either the relative path to the Web application or the absolute path to a local file. Syntax: CSI_MarkupPolicyDefLocation =WEB-INF\lib\MarkupPolicy.xml or c:\temp\MarkupPolicy.xml Markup Policy is used when creating a Mobile Pack. For more information Mobile Pack policy, refer to the Oracle *AutoVue Installation and Administration Manual*.	\WEB-INF\lib\MarkupPolicy.xml
CSI_BlankMarkupLocation =	The location of the blank markup which is either the relative path to the Web application or the absolute path to a local file. Syntax: CSI_BlankMarkupLocation =\custom\jvue\BlankMarkup.mrk or c:\temp\BlankMarkup.mrk Blank markup is used internally by VueLink for OEVF use cases.	\WEB-INF\lib\BlankMarkup.mrk
UCM Search Parameters **Note:** These parameters should not be changed if you are not changing the packaging of VueLink Web application.		
MaxSearchResults	Specify the maximum number of result display on VL for UCM search page. Syntax: MaxSearchResults=100	
AdvanceSearch	Semi-colon separated the search criteria and each search criteria should have three values (name, type, Label) which is separated by comma ",". The attributes which are support for VueLink for UCM Search are listed in Appendix B. Syntax: AdvanceSearch= dDocType,text,Type;dCollectionID,list,Folder	

Property	Description	Default
DCOLLECTIONID	The UCM attribute name that is used by the "COLLECTION_BROWSE" service to list UCM folders. Syntax: DCOLLECTIONID=dCollectionID	dCollectionID
XCOLLECTIONID	The UCM attribute name that is used by the GET_SEARCH_RESULTS service in UCM to list the contents of a given folder. Syntax: XCOLLECTIONID=xCollectionID	xCollectionID
Oracle Enterprise Visualization Applications (OEVA) Parameters		
OEVFAssetID	For Enterprise Application, corresponding name of asset in UCM and the separator of asset values. Semi-colon separates the UCM asset attribute name and values separator. This attribute is used to support Oracle Enterprise Visual Applications (OEVA). If it is not used, please comment out this line. For more information about OEVA, refer to the *Oracle Enterprise Visual Applications Developer's Guide.* Syntax: OEVFAssetID=xsiebelAsset;,	
OEVFWorkflowID	For Enterprise Application, corresponding name of workflow in UCM and the separator of workflow values. Semi-colon separates the UCM workflow attribute name and values separator. This attribute is used to support Oracle Enterprise Visual Applications. If it is not used, please comment out this line. For more information about OEVA, see *Oracle Enterprise Visual Applications Developer's Guide*. Syntax: OEVFWorkflowID=xsiebelSvcReq;,	
Other Parameters **Note:** These parameters should not be changed if you are not changing the packaging of VueLink Web application.		
Renditions	Semi-colon separated list of allowed formats used as renditions. This is a list of conversion formats that enable saving the result of conversion back into UCM. To disable saving conversion back to UCM set this variable empty. By conversion to TIFF, windows Bitmap and PDF will give the user option to save the conversion back to UCM. Syntax: Renditions =PCRS_TIF;PCRS_BMP;PCVC_PDF	
saveAttempt	Specify the number of attempts when saving files to the backend UCM system and checking the file existence.	20

4 Save the configuration file and close the text editor.

5.3 Installing the CIS Client

VueLink uses the Content Integration Suite (CIS) to communicate with the backend UCM system. CIS has a built-in initial default pool size of 40 and a default max pool size of 200. The initial pool and max pool sizes can be increased to accommodate a higher number of AutoVue users. These settings are modified in the adapterconfig.xml file in the VueLink deployment folder: /vuelink/WEB-INF/lib.

For more information on CIS initial and max pool sizes, refer to the *CIS Administration Guide* that is available on the Oracle Technology Network at **http://www.oracle.com/technetwork/indexes/documentation/index.html**.

The following steps describe how to install the CIS client.

1 Locate the cis-client-11g.jar file in the UCM distribution directory.
For example: <ucm-home>\Distribution\CIS

2 Copy the cis-client-11g.jar file to the <VueLink Unzip folder>Vuelink_war\vuelink\WEB-INF\lib directory.

5.4 Deploying the VueLink Web Application

After conducting the manual steps, archive the VueLink application to a WAR file and deploy the WAR file according to the deployment instructions in your application server documentation.

The same application server that hosts the UCM Web application (for example, WebLogic) can be used to host the VueLink Web application as long as VueLink is deployed in a separate context.

Security plays an important role in communication between applications. It is highly recommended to deploy the VueLink in a secure fashion. **"HTTPS/SSL Deployment"** provides the step on how to deploy the VueLink with SSL/HTTPS settings.

It is also important to limit the VueLink Web application's access to the server machines that host UCM and the AutoVue server. Refer to appendix "Restricting Access to a VueLink Web Application".

5.4.1 Verification

To make sure that the deployment of the VueLink WAR file is successful, and that the application is ready to server, you must verify the availability of the following two servlets.

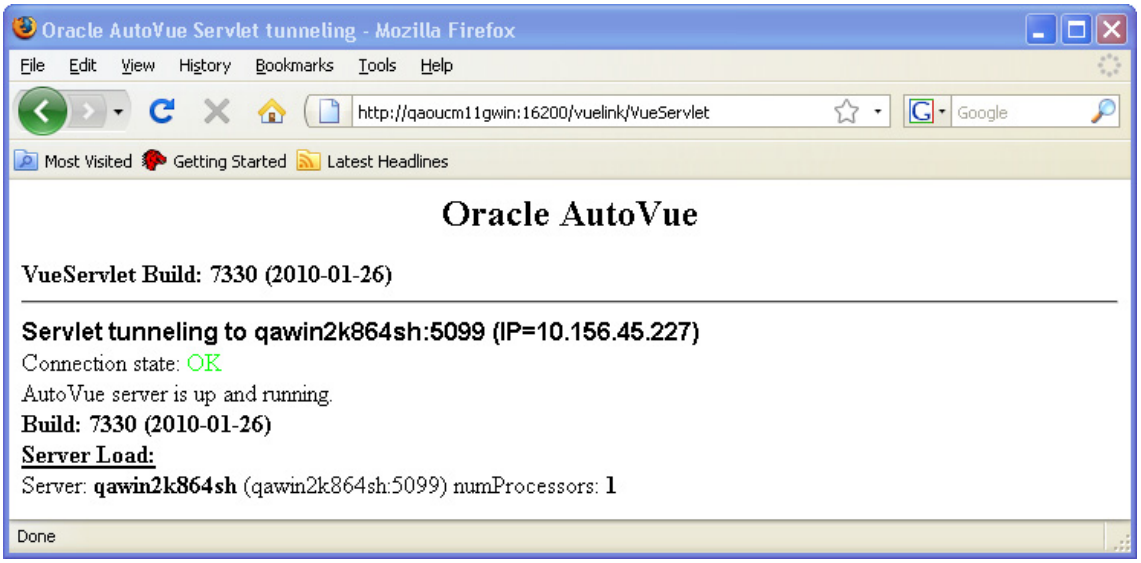
5.4.1.1 Verifying that VueServlet is Running Properly

To verify that the VueServlet is running properly, from the VueLink's server machine, launch a Web browser and enter the URL pointing to the VueServlet alias name, which is defined inside web.xml (by default it is VueServlet) of the VueLink Web application.

Here is an example of a URL:

`http://<Vuelink Host Machine>/vuelink/VueServlet`

A green *OK* message should appear on the screen with some information about the build number and date of VueServlet along with the hostname of the AutoVue server and its port number.



5.4.1.2 Verifying that VueLink is Running Properly

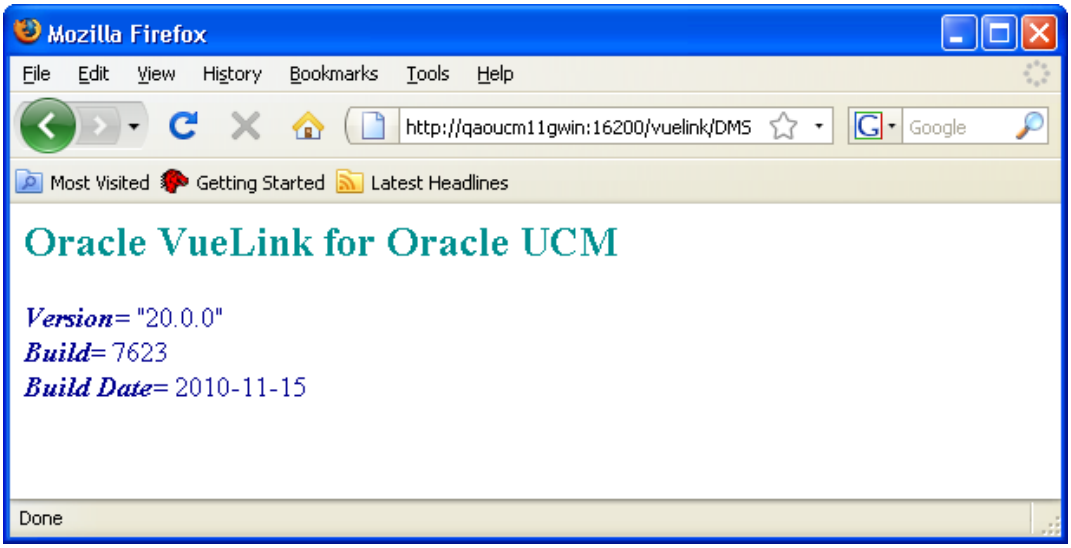
To verify that the VueLink Servlet (com.cimmetry.vuelink.ucm.DMS) is running properly, from the AutoVue server, launch your Web browser and enter the URL pointing to the Servlet alias name, which you assigned when installing VueLink.war into the application server.

The following is an example of a URL:

`http://<VueLink Host Machine>/vuelink/DMS`

The following screenshot shows a sample response if VueLink is running properly. If you do not get a response similar to the one shown, verify that the VueLink Servlet is installed and deployed properly and that your application server is running and functioning properly.

Note: The build number and build date are shown in the response.



5.5 Customizing UCM

This section provides information on how to register the AutoVue component with UCM. When you successfully complete this task, the *View in AutoVue* menu should appear in the UCM interface.

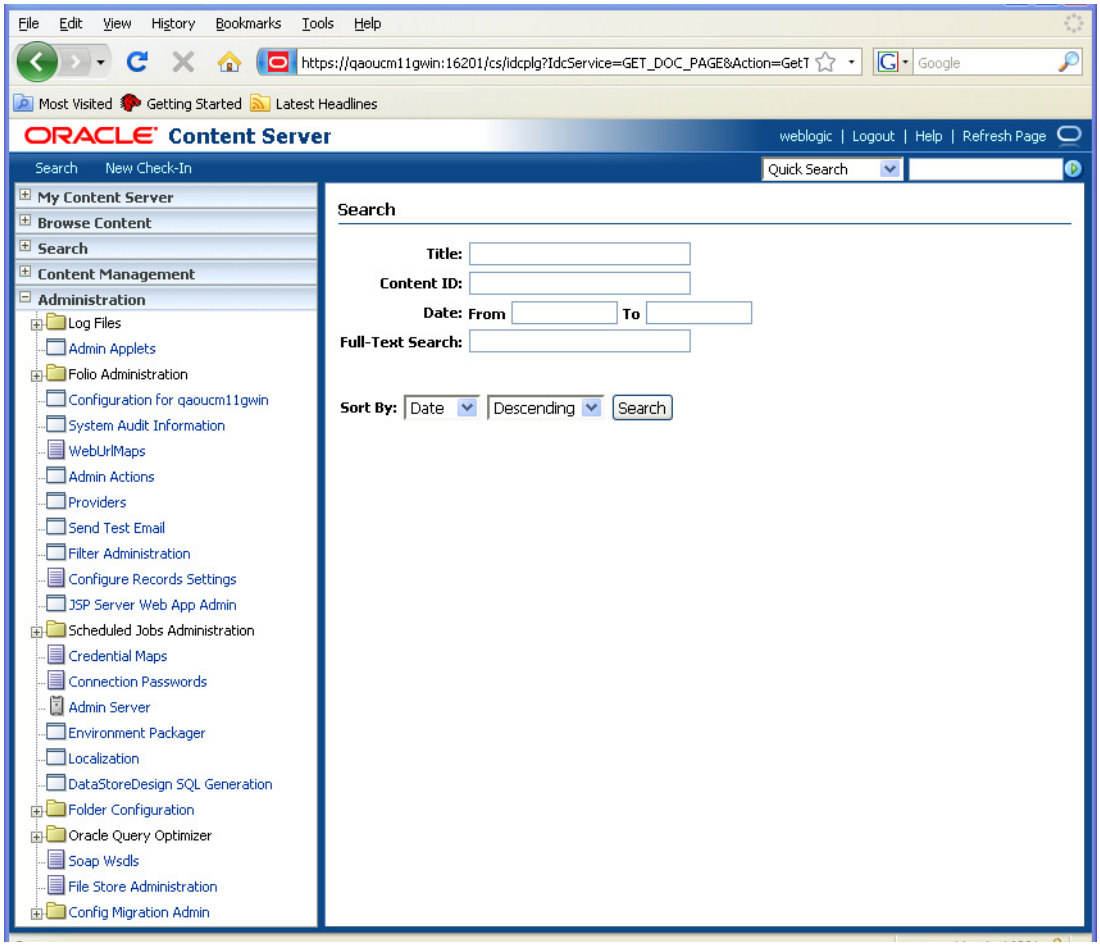
To install the VueLink module (AutoVue component) for UCM, perform the following:

1 Verify that UCM is installed properly.

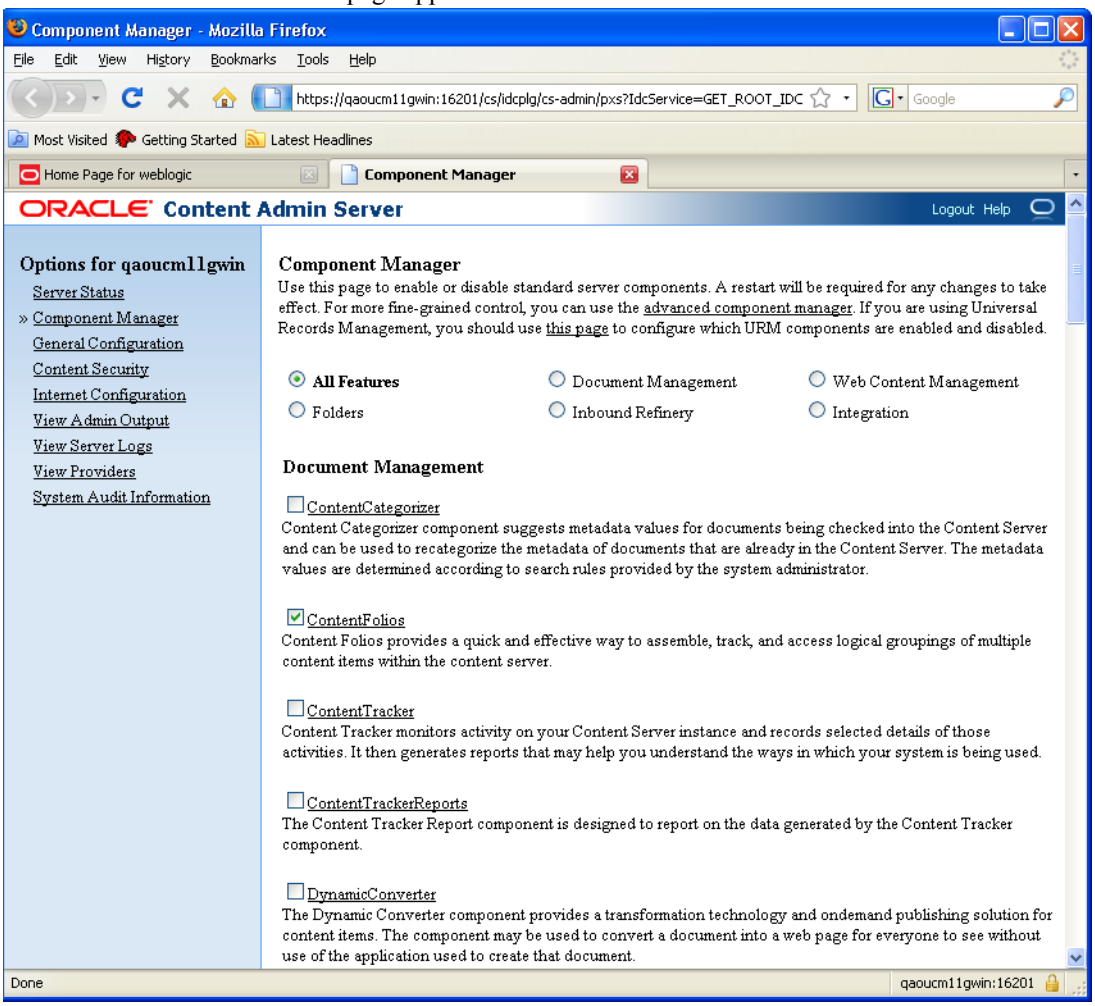
2 Run a Web browser.

3 Login to Oracle UCM as Administrator.

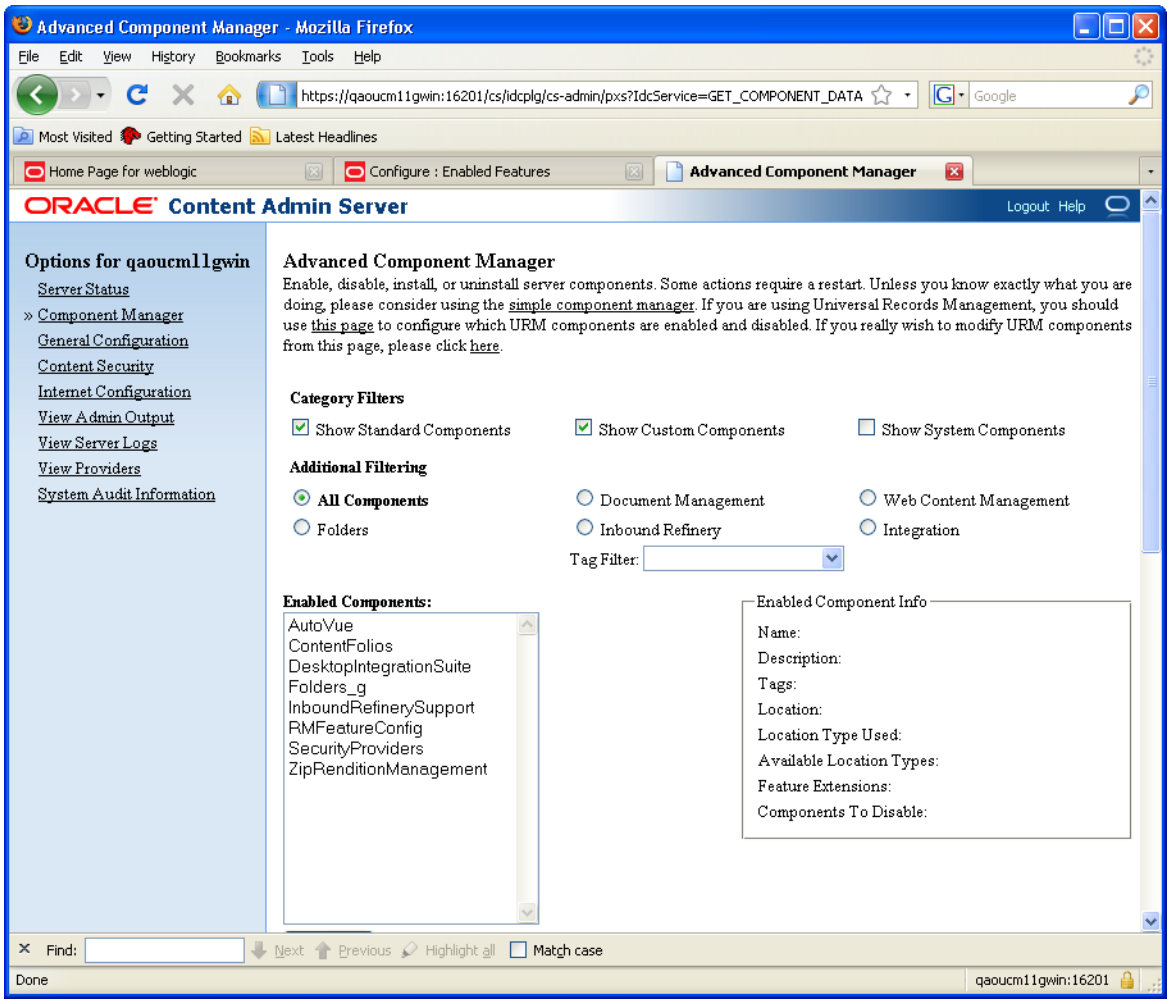
4 From the **Administration** menu, and then select **Admin Server.**



The Content Admin Server page appears.



5 From the main page, click on the link for **advanced component manager**.
The Advanced Component Manager appears.



6 To install a new component, scroll to the bottom of the page, and then click **Browse** in the Install New Component section.

The File Upload dialog appears.

7 Navigate to the folder containing the VueLink module for UCM, and select AutoVue.zip.

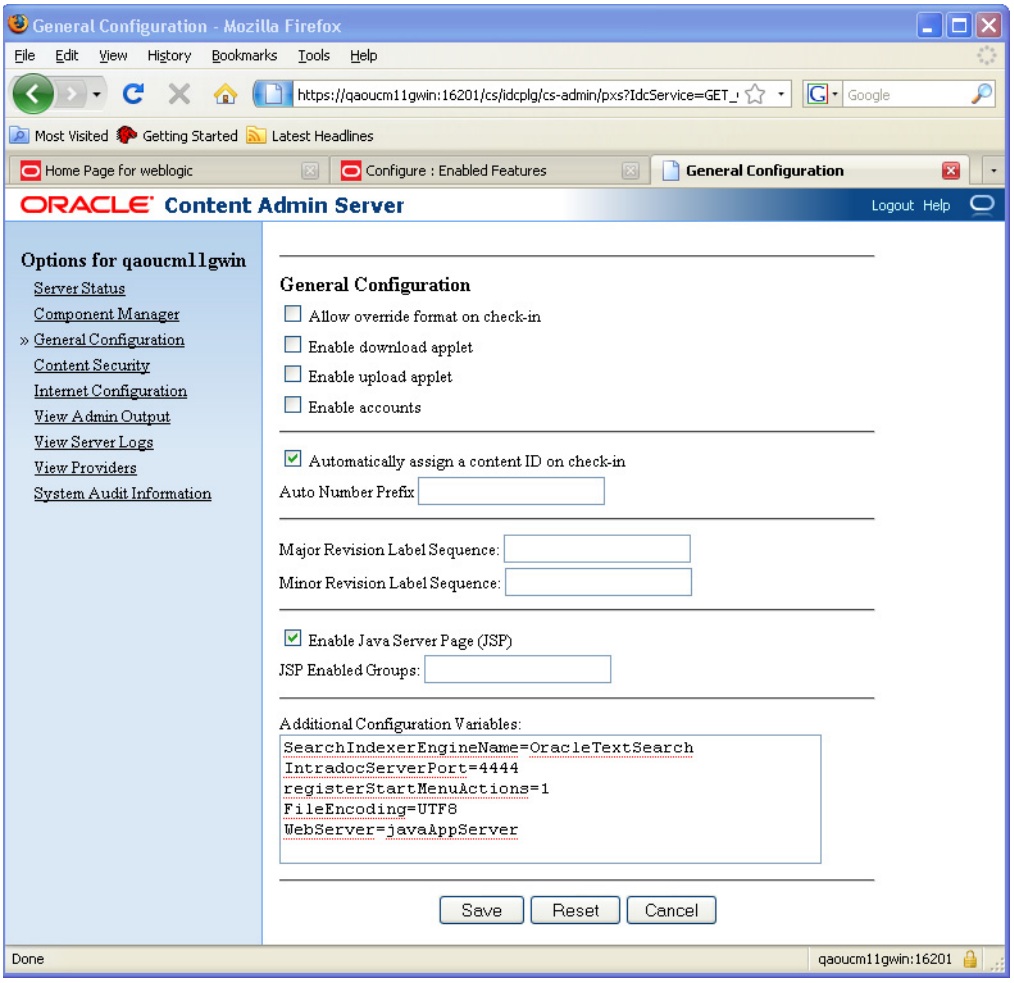
Note: This file is usually found on the media pack under the <VueLink Unzip Folder>\dms_customization folder.

8 Click **Install.**

Note: If the AutoVue component is listed as a disabled component, select it and click **Enable.**

9 From the Options panel, click **General Configuration.**

The General Configuration page appears.



10 Select the **Enable Java Server Page (JSP)** check box.

11 If a security group is specified in the **JSP Enabled Groups** field, make sure that the group exists.

12 To automatically assign a content ID, select the **Automatically assign a content ID on check in** check box.

13 Click **Save.**

14 Restart the UCM service.

This completes the customization.

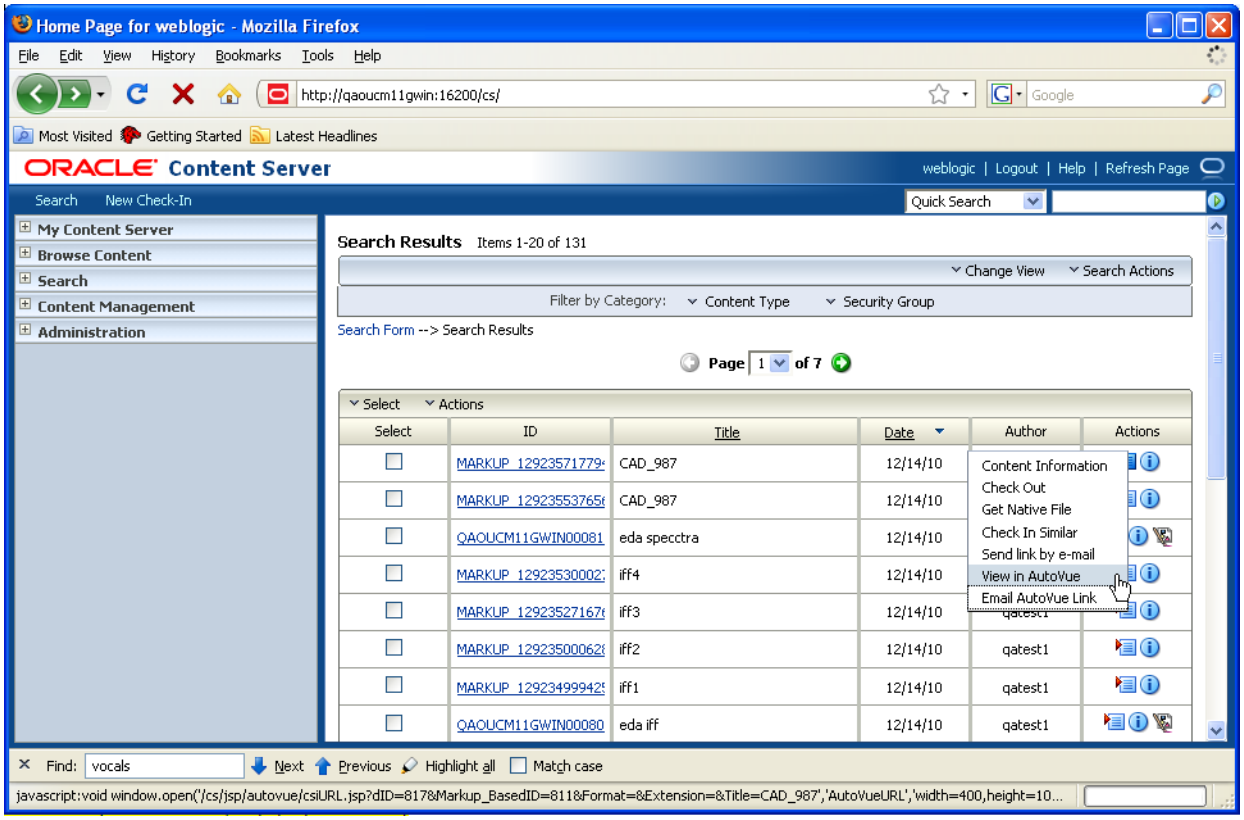
5.5.1 Verification

To verify that the AutoVue component has been installed in the UCM, perform the following steps:

1 Login to Oracle UCM as Administrator.
The Search page appears.

2 Click **Search**.
The Search Results page appears.

3 From the actions column click .
The View in AutoVue and Email AutoVue Link menu options should appear.



Once the AutoVue component is installed in UCM, you may configure it.

5.6 Adding a Markup Schema

In order for VueLink to support markup functionality, the administrator must first configure UCM by adding the following two schema elements:

- A new field called **Markup_BasedID.**
- A new field called **MarkupCounter**.

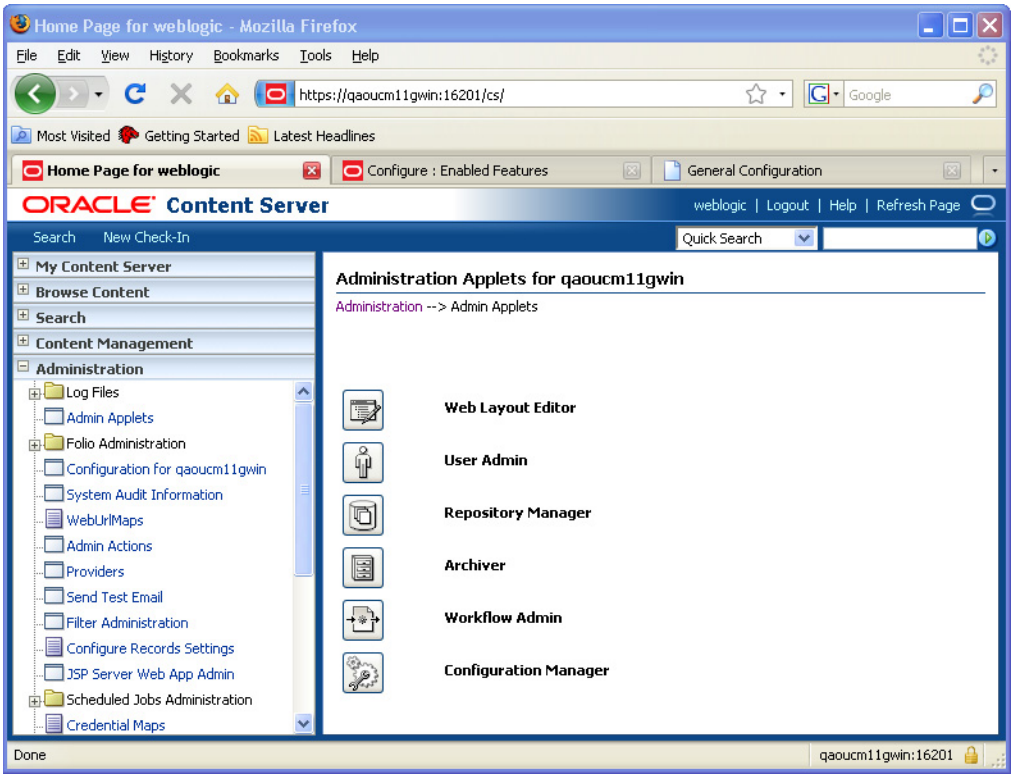
  Note: The field names are case sensitive.

To do so, follow these steps:

1 Run a Web browser.

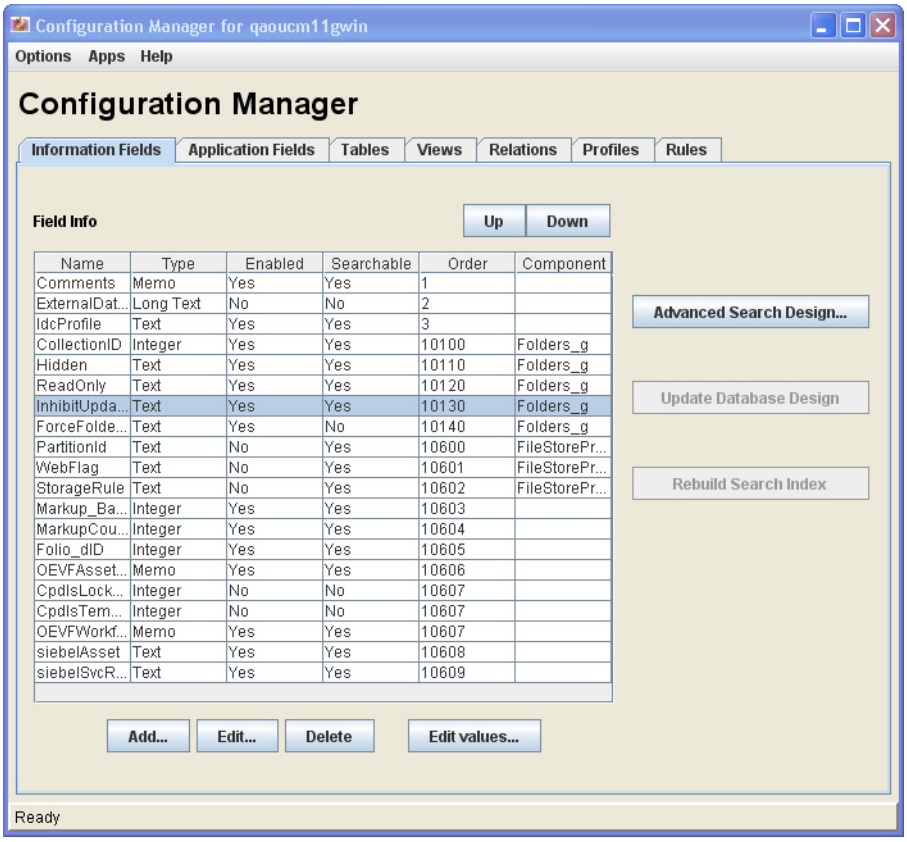
2 Login to Oracle UCM as Administrator.

3 From the **Administration** menu, and then select **Admin Applets.**
The Administration Applets for idc page appears.

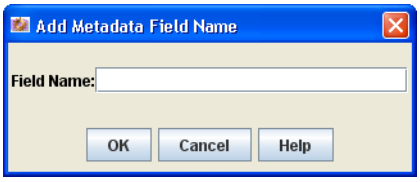


4 Click **Configuration Manager** .

The Configuration Manager dialog appears.



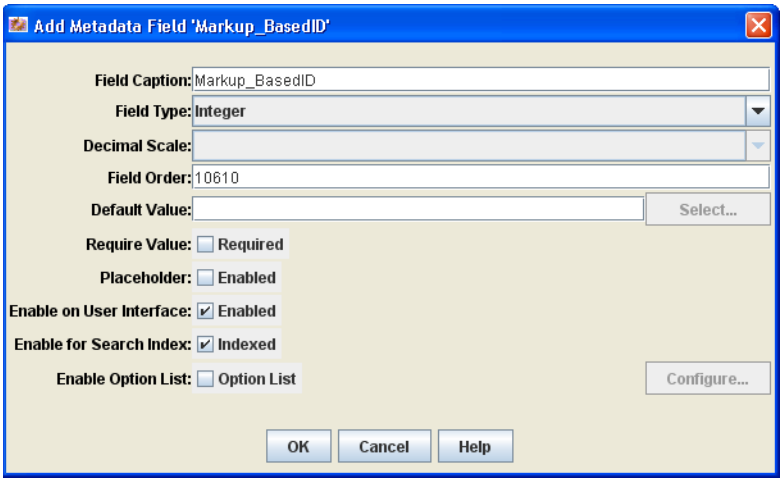
5 From the **Information Fields** tab, click **Add.**
The Add Metadata Field Name dialog appears.



6 Enter *Markup_BasedID* in the **Field Name** field and then click **OK.**

Note: It is important to match the case of the field name as it is case sensitive.

The Add Metadata Field Name 'Markup_BasedID' dialog appears.



7 Enter the following information in the dialog:

- From the Field Type list, select **Integer.**
- Accept the pre-populated value in the **Field Order** field.
- Select the **Enable on User Interface** check box.
- Select the **Enable for Search Index** check box.

8 Click **OK.**
The dialog closes and Markup_BasedID is added to the Field Info list.

9 Repeat steps 5 through 8 for Markup Counter except enter "MarkupCounter" in the Field Name field.

10 Click **Update Database Design.**

11 Click **Rebuild Search Index**.

5.7 Optional Configurations

This section provides information on optional configurations.

5.7.1 Working With XRefs

VueLink supports External Reference Files (XRefs) that are associated with a document with the use of **Folios**. Before UCM users can view CAD files with XRefs, the administrator must first create a Folio template as outlined below.

Note: Only folios based on this template will be interpreted as XRefs by VueLink.

For more information on how the XRef folios are created using the template, refer to the "Creating XRefs Based on CAD Folio Template" appendix of the *Oracle AutoVue VueLink for UCM User Guide*.

5.7.1.1 Importing a CAD Folio Template

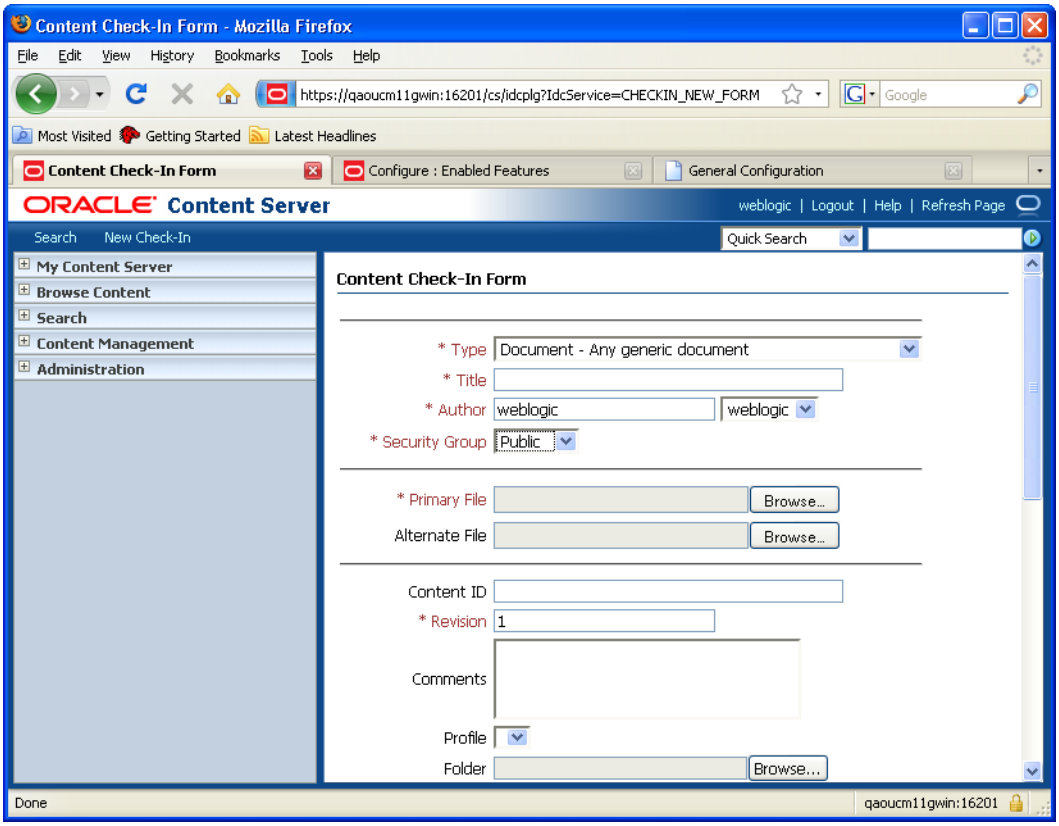
The CAD Folio Template is included as part of VueLink. It is recommended that you import the template into your UCM. The following steps explain how to import and edit a template.

Note: In the event you run into problems importing the template, you can create it by following the steps outlined in the **"Creating a CAD Folio Template"**.

1 Run a Web browser.

2 Login to Oracle UCM as Administrator.

3 Click **New Check-In.** The Content Check In Form page appears.



4 From the Type list, select a type.

5 Enter *Folio Template for CAD with XRefs* in the **Title** field.

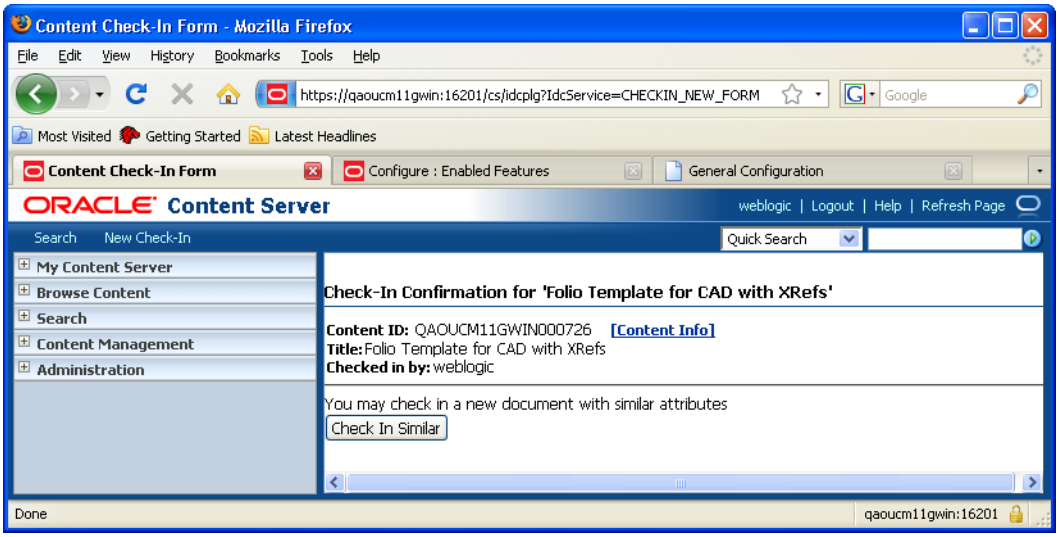
6 From the Security Group list, select **Public** or **Secure.**

Note: The security group defines the user read/write permissions. The administrator should select a security group that allows only users with administrative privileges to modify the template.

7 To the right of the **Primary File** field, click **Browse.**
The Choose File dialog appears.

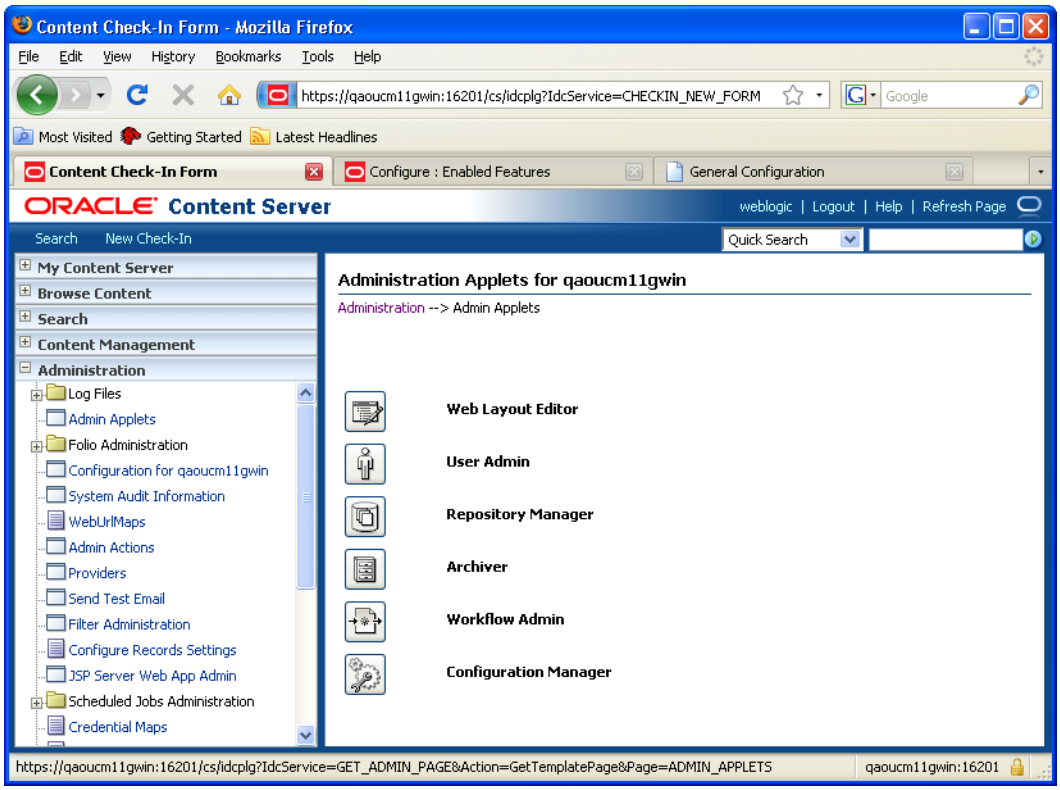
8 Browse to the dms_extension folder on the VueLink media pack and select the **XRefsFolioTemplate.xcst** file.

9 Scroll to the bottom of the page and click **Check In.**
The Check In Conformation page appears. The CAD Folio template is imported into your UCM. Note the Content ID of the CAD Folio template.



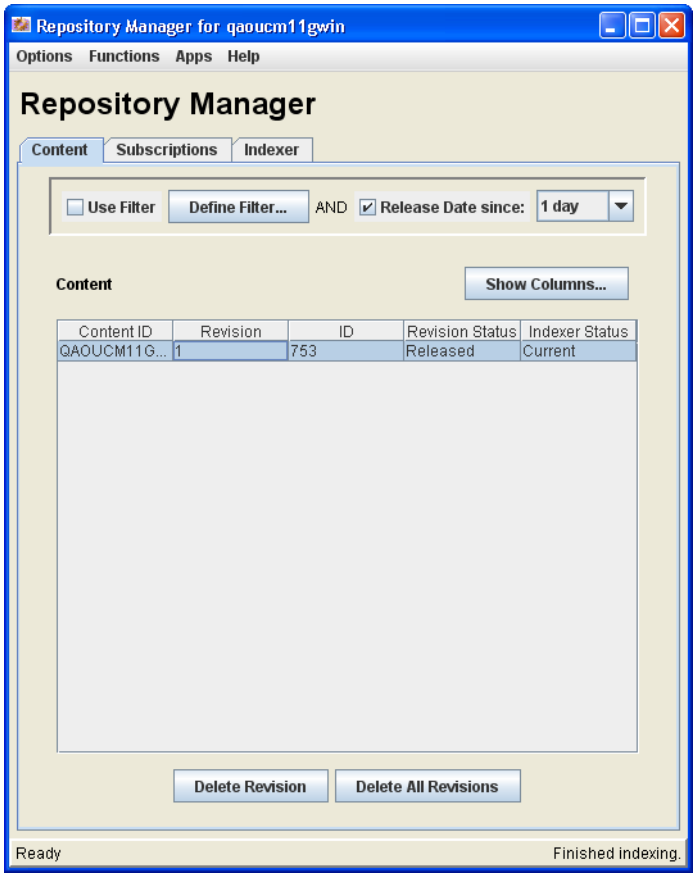
10 From the **Administration** menu, select **Admin Applets.**

The Administration Applets page appears.



11 Click **Repository Manager** .

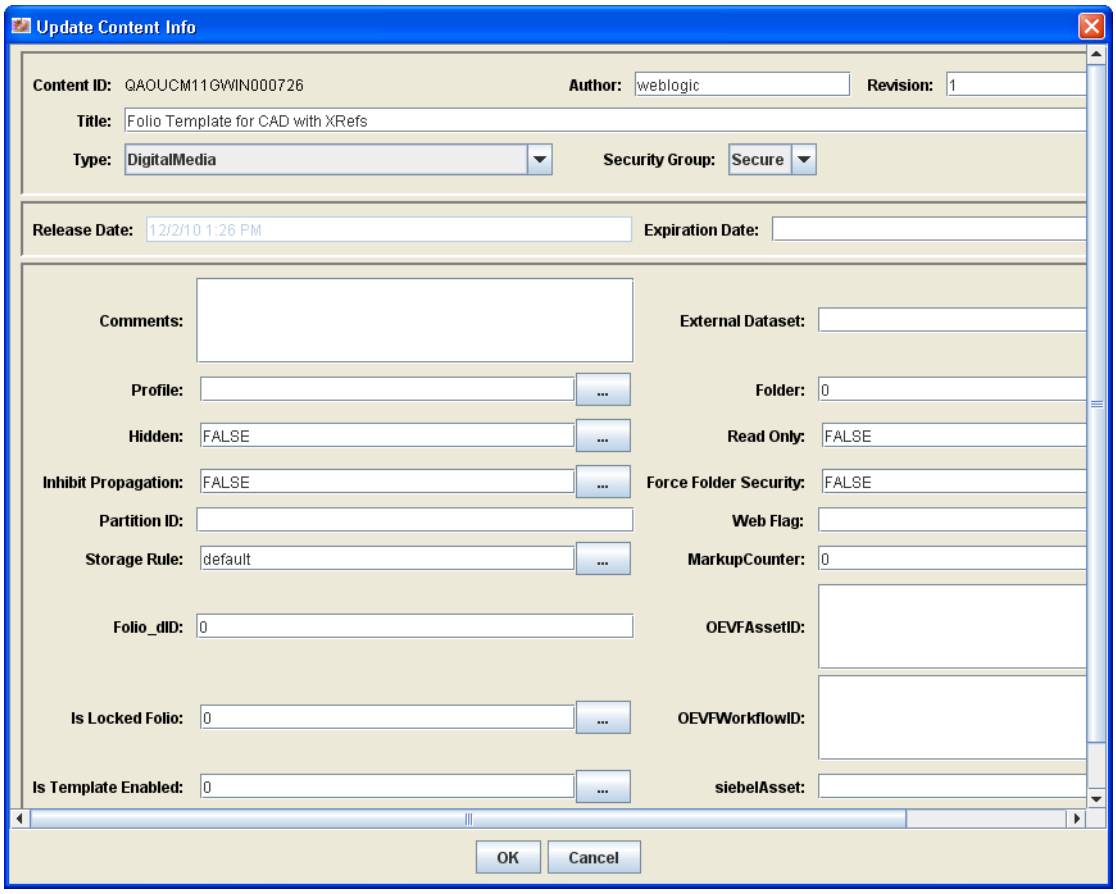
The Repository Manager dialog appears.



12 Scroll down to the Content ID of your CAD Folio template.

13 Right-click the template, and select **Update.**

The Update Content Info dialog appears.



14 Enter *1* in the **Is Template Enabled** field.

15 Click **OK.**

The Update Content Info dialog closes.

16 From the **Options** menu of the Repository Manager, click **Exit.**

The Repository Manager dialog closes.

17 At the top right of the page, click on the arrow to the right of the Quick Search field.

The Search Results page appears.

18 Click on the content ID for the folio template.

The Edit Folio template page appears.

19 From the Action menu, select **Save Changes**.

Note: When the template is checked in to UCM, it should have the format *text/xcst*.

Users can now create folios based on this template.

5.7.1.2 Adding the Folio_dID Field

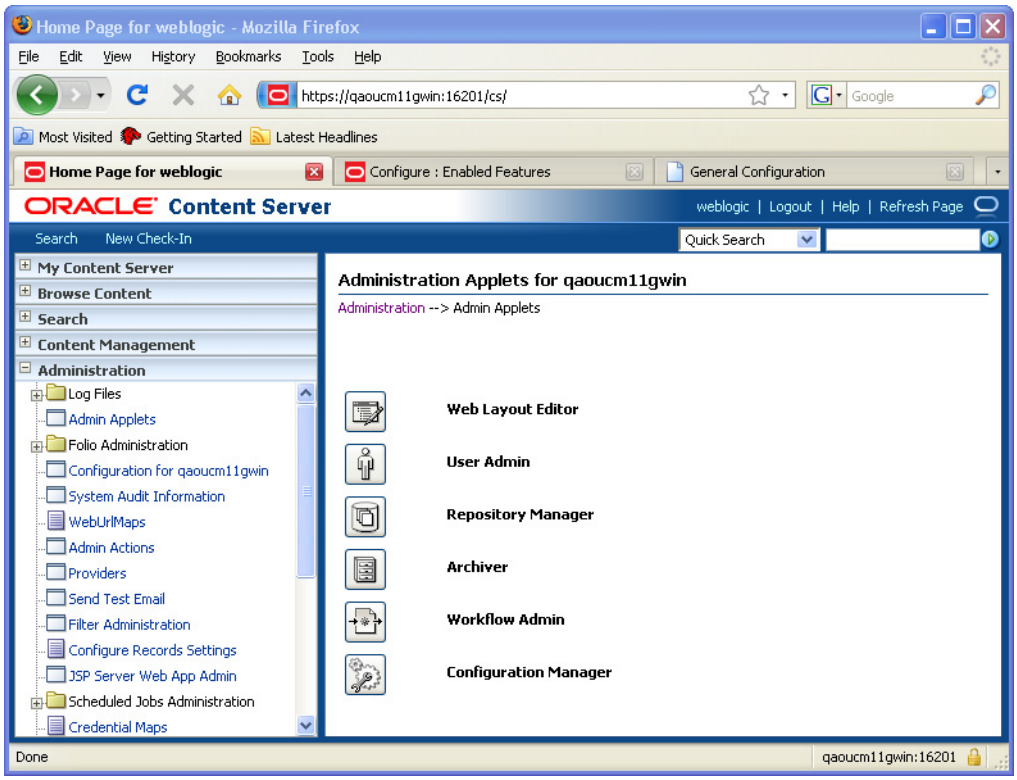
This section describes the required steps to add the metadata field, Folio_dID, to the structure of a document. This field is used to establish a connection from the master file to the XRef folio that contains data about the master file

and its XRefs. By setting this link, you can view the XRefs whenever viewing the master file. For additional information on how to link the master file to the XRef folio, see *VueLink for Oracle UCM User's Manual.*

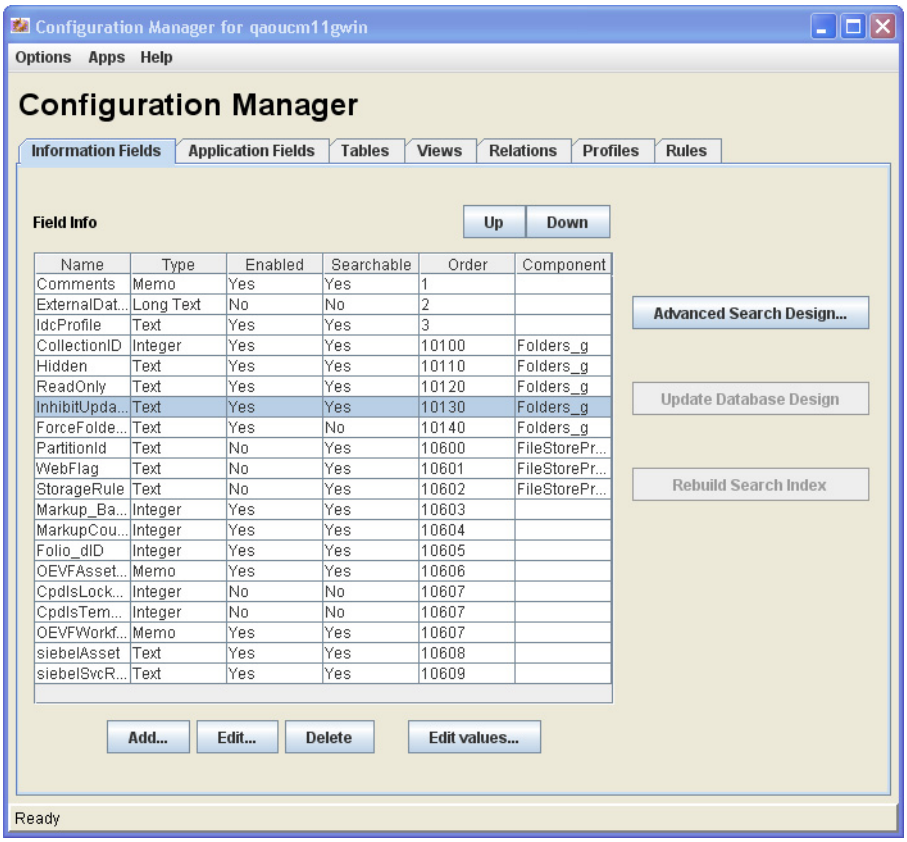
1 Run a Web browser.

2 Login to Oracle UCM as Administrator.

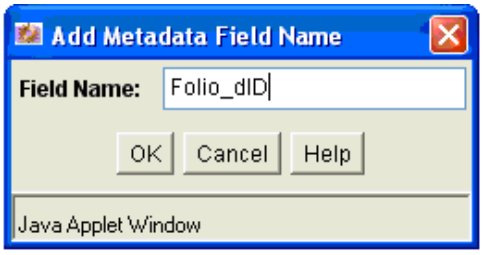
3 From the **Administration** menu, select **Admin Applet.** The Administration Applets page appears.



Click **Configuration Manager** **.** The Configuration Manager dialog appears.

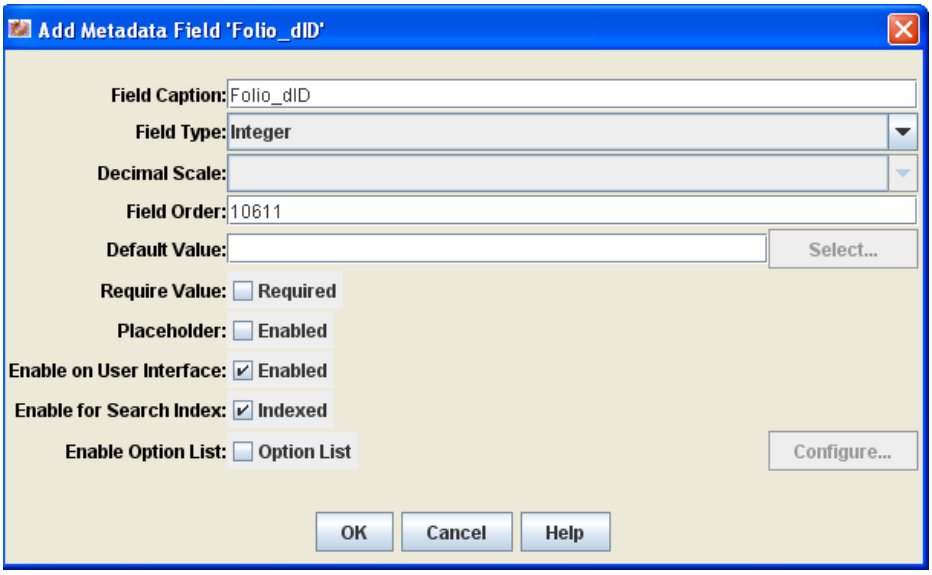


4 From the **Information Fields** tab, click **Add.**
The Add Metadata Field Name dialog appears.



5 Enter *Folio_dID* in the **Field Name** field and then click **OK.**

The Add Metadata Field Name ‘Folio_dID’ dialog appears.

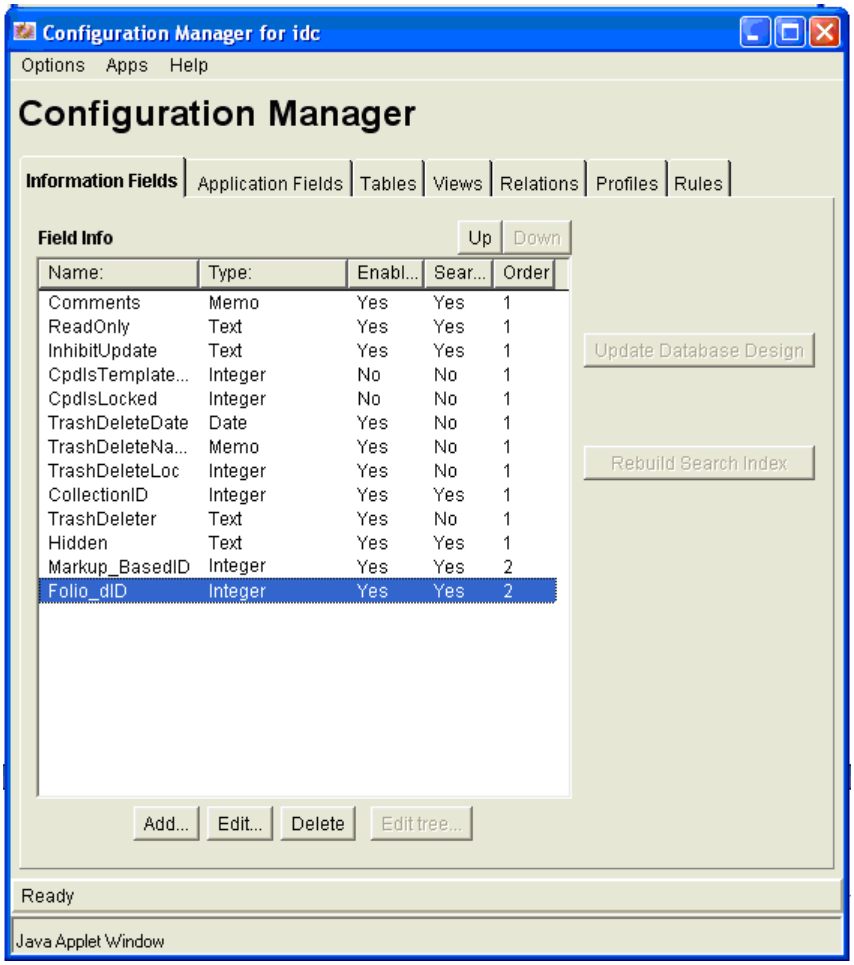


6 Enter the following information in the dialog:

- From the Field Type list, select **Integer.**
- Accept the pre-populated value in the **Field Order** field.
- Select the **Enable on User Interface** and **Enable for Search Index** check boxes.

7 Click **OK.**

The dialog closes and Folio_dID is added to the Field Info list.



8 Click **Update Database Design**.

9 Click **Rebuild Search Index**.

5.7.1.3 Configuring XRefs using Folios

Before proceeding with steps outlined below, ensure that your UCM installation has the Folios component (ContentFolios) deployed.

1 Launch a Web browser.

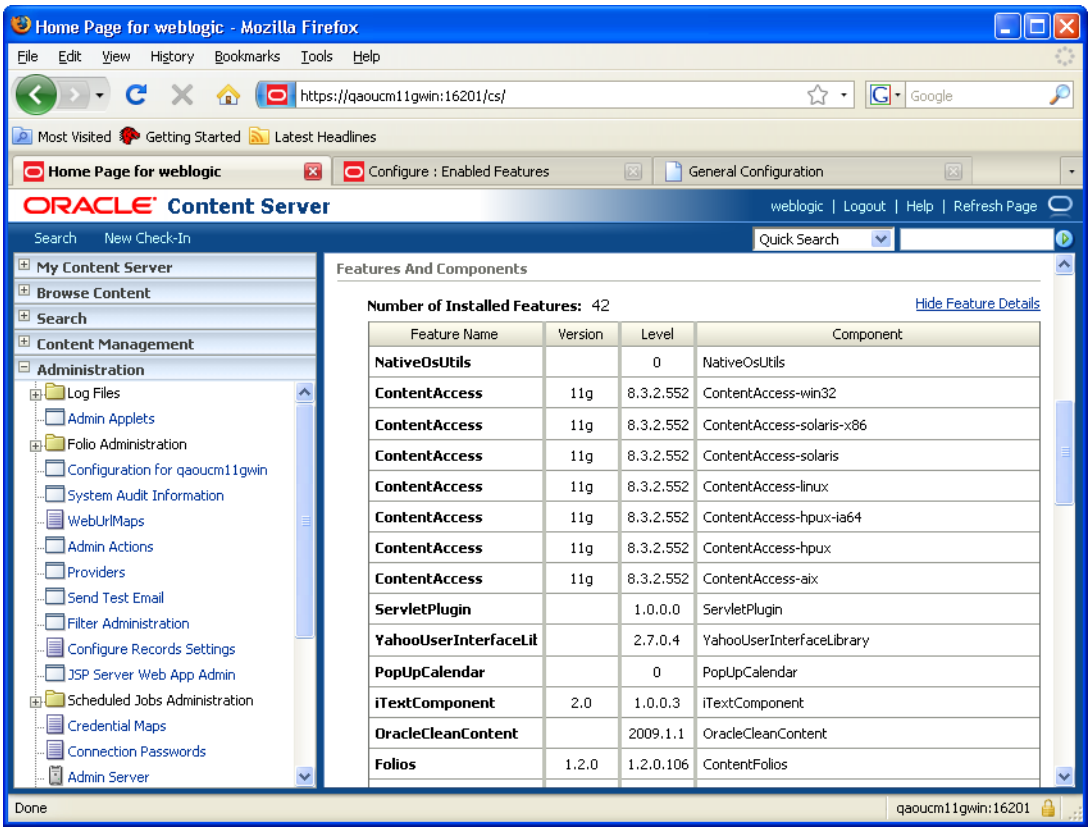
2 Login to Oracle UCM as Administrator.

3 From the **Administration** menu, select **Configuration for *<server name>*.**
The Server Configuration Information page appears.

4 Click the **Feature Details** link to expand the Features and Components table.

5 Under the Feature Name column, verify that *Folios* is listed.

Note: If Folios is not listed, please verify your Folios installation.

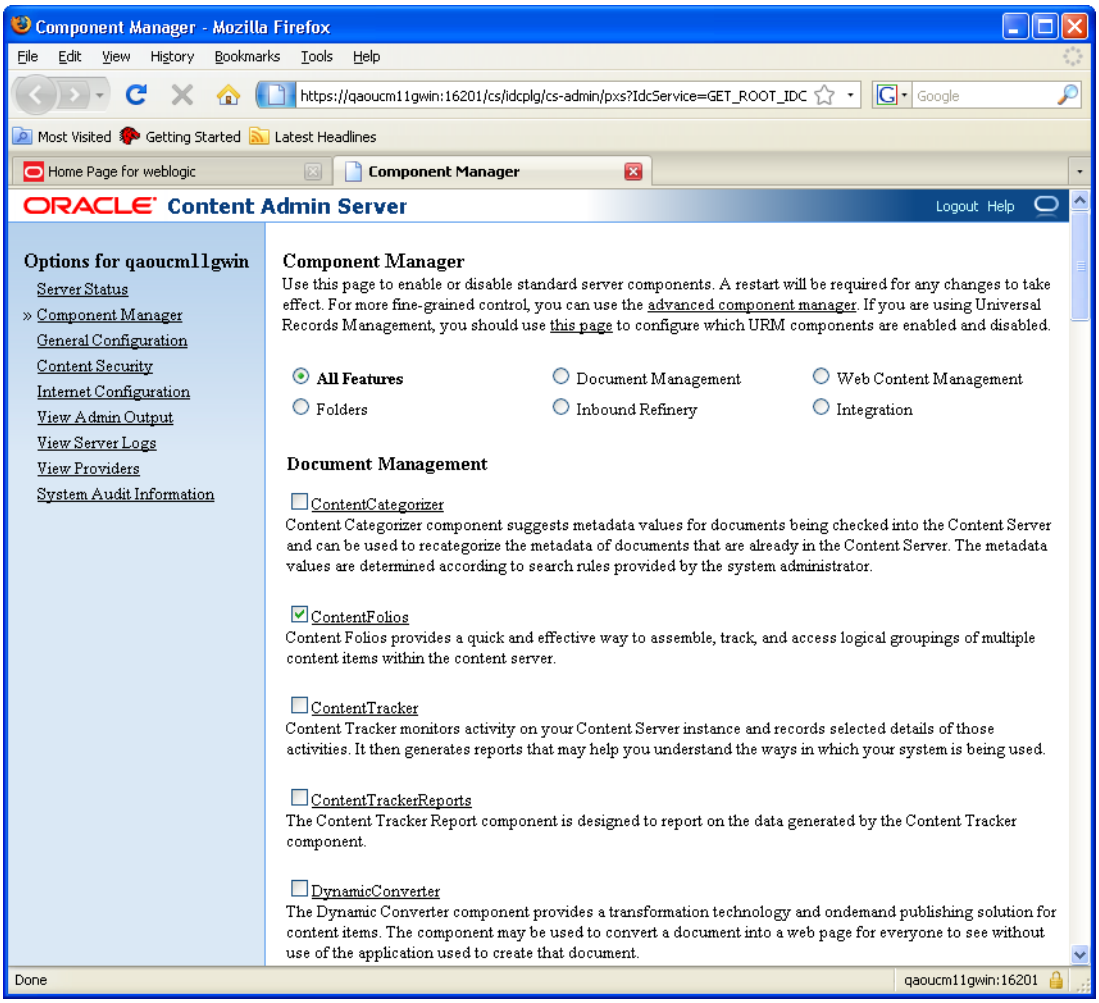


5.7.1.4 Allowing Users with Read Permission to View a File

To allow users with a read permission to view a file, do the following:

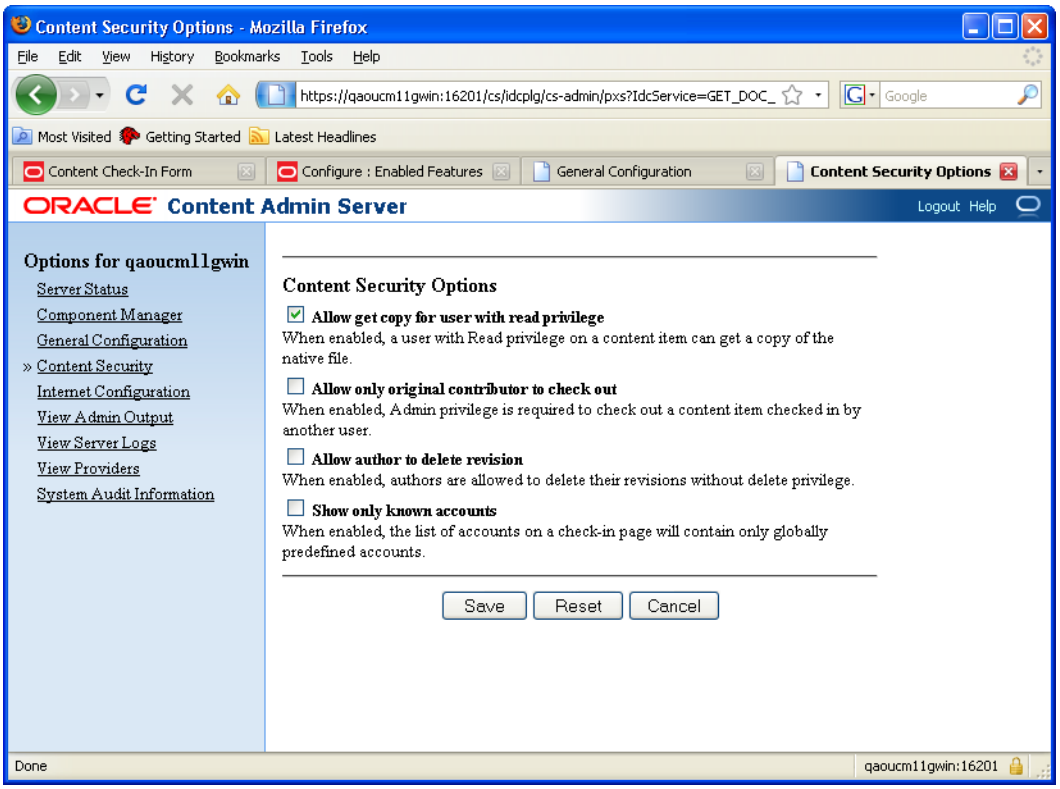
1 From the **Administration** menu, select **Admin Server.**

The Administration for Servers page appears.



2 Under Option, click **Content Security.**

The Content Security Options page appears.



3 Select the **Allow get copy for user with read privilege** check box.

4 Click **Save.**

5.7.2 Configuring System Locale

If the UCM server uses a locale other than English-US, the English-US locale must be enabled in order to view a file in AutoVue. This is due to the following limitation in Content Integration Suite (CIS) of UCM:

- When a non English-US formatted date is sent to Content Sever via CIS, an error is thrown. By default, CIS forces communication with Content Server in English-US locale.

To resolve this issue, English-US locale must be enabled on the Content Server:

1 From the **Start** menu of the UCM server machine, select **All Programs**, select **Oracle Content Server**, select **idc**, select **Utilities**, and then select **System Properties**.

2 Select the **Localization** tab and then enable English-US.

3 Restart the UCM server.

5.7.3 Localizing Email from Email AutoVue Link

To translate the email from the Email AutoVue Link option to a language other than English:

1 From the <UCM-Deployment-Domain>\ucm\cs\custom\AutoVue\idcautopublish\jsp\autovue directory, open the csiURL.jsp file.

2 Translate the message.

3 Save the file.

4 Manually publish the static layout files. Refer to "Modifying csiApplet.jsp" for more information.

5.7.4 Modifying csiApplet.jsp

In order to change AutoVue client applet parameters, you may modify the csiApplet.jsp file:

1 From the <UCM-Deployment-Domain>\ucm\cs\custom\AutoVue\idcautopublish\jsp\autovue directory, open csiApplet.jsp in a text editor.

2 Modify the file as required.

3 You must now publish static layout files. To do so:

a. Run a Web browser.

b. Login to Oracle UCM as Administrator.

c. From the **Administrator** menu, click **Admin Actions**.
The Admin actions status page appears.

d. Click **publish static layout files**.

Alternately, you can publish static layout files from the Configuration Manager:

a. Run a web browser.

b. Login to Oracle UCM as Administrator.

c. From the **Administrator** menu, click **Admin Applets**.
The Administration Applet page appears.

d. Click **Configuration Manager**.
The Configuration Manager dialog appears.

e. From the **Options** menu, select **Publish static layout files**.

5.8 Upgrading to a Newer Version of VueLink

This sections describes how to migrate settings from previous versions of Oracle AutoVue VueLink for Oracle AutoVue to the newest version.

5.8.1 Markup Counter Synchronization

The MarkupCounter field keeps count of the number of markups related to a document, and automatically updates when adding or deleting markups. If you have upgraded Oracle AutoVue VueLink for Oracle UCM from an earlier version and have markups saved in the backend UCM system, then a Markup Counter synchronization is required. To perform the synchronization, you must run the runMarkupCounterSync tool.

5.8.1.1 Executing the runMarkupCounterSync Tool

After installing VueLink and completing the required manual configurations (for example, adding the MarkupCounter field, updating the SCS Adapter file, and copying the CIS client package), from the command line, execute runMarkupCounterSync.bat (or runMarkupCounterSynch.sh for Linux) that is located in the VueLink installation folder.

Note: The relative path inside the script is based on the default folder structure in the VueLink installation folder. This batch file runs an internal code that relies on certain libraries (for example, cis client) and configuration files (for example, adapterconfig.xml) to be available and configured properly. As a result, if any change has been made in the folder structure, or a file is missing, the batch file must be updated by updating the classpath of the libraries and/or the path to the xml configuration file (if needed). Note that the content of the batch file is a one-line JAVA command.

1 From the command line, execute the runMarkupCounterSync tool.

2 Enter the UCM Administrator username and password and click **OK**.
The script performs a query on all records and their revisions inside the backend UCM system and then displays whether each record has either been verified or updated.

At the end of the query, the script exits to the command line. Synchronization of the MarkupCounter fields for all records is complete.

Take note of the following:

- If the tool is executed again, it should only display a verification for each record.
- If the MarkupCounter field does not exist, the tool displays a notification and exits. There is a similar occurrence if the path to adapterconfig.xml is broken or an incorrect UCM Administrator username/password is entered.
- Make sure to run this tool only after all manual configuration steps are completed.

5.8.1.2 Migration of Options from vuelink.properties to Web.xml

As of this version of VueLink, all configuration options from vuelink.properties have been moved to Web.xml. As a result, the vuelink.properties file no longer exists.

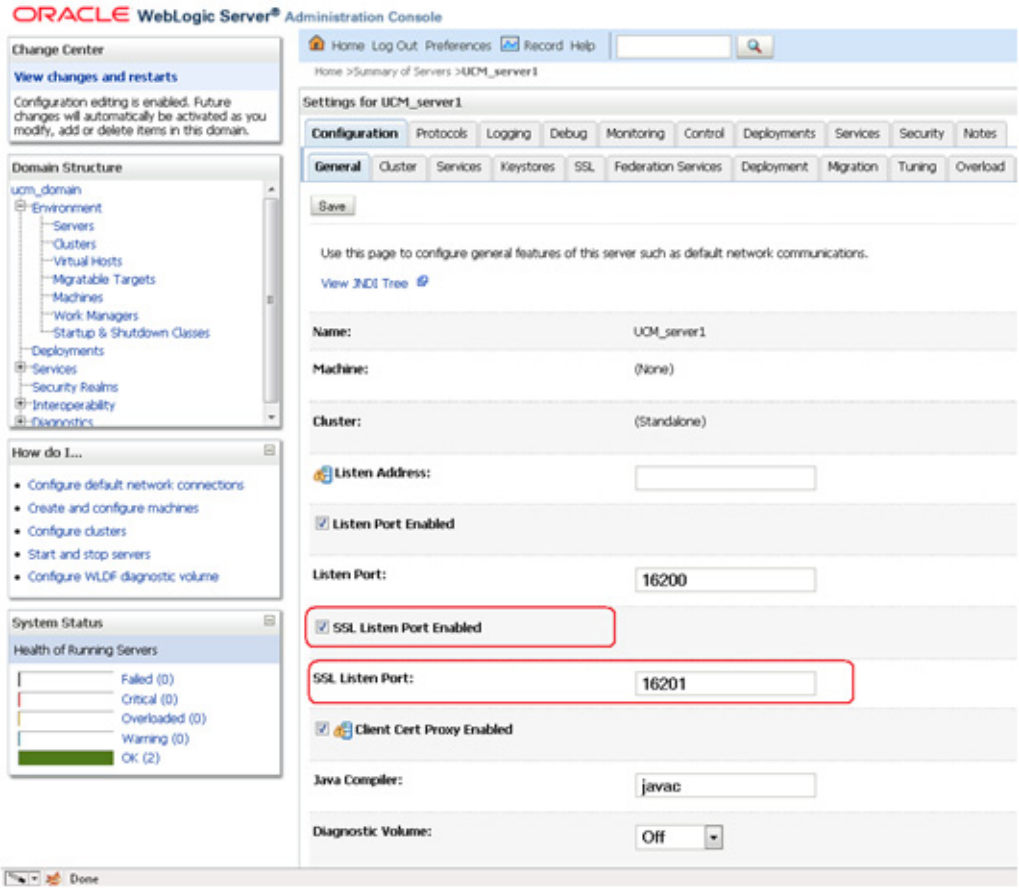
5.9 HTTPS/SSL Deployment

When establishing secure communication between VueLink and AutoVue it is necessary to set up an HTTPS configuration. Since VueLink is only certified with Oracle Weblogic, the following steps describe the setup based on Weblogic Application server.

1 You must first enable the HTTPS on the application server.

- In the Weblogic administration console, select the server that the VueLink is deployed on.
- From the General Configuration tab, select **SSL Listen Port Enabled**.

- Set the port number.
  By default in Weblogic, but not mandatory, the HTTPS port is one number higher than the HTTP port.



2 Weblogic includes a demo certificate. If you have your own certificate, you must refer the Weblogic *Administration Guide* for information on how to replace the demo certificate.

3 Verify the certificate and that the HTTPS connection is working by accessing the VueLink URL through HTTPS protocol and port.

For Example: https://<*VueLink host server name*>:<*HTTPS port* >/vuelink/DMS

If the certificate is not trusted, the browser prompts you to accept it. If you do not accept it, the certificate is stored automatically in the browser certificate repository.

4 Import the certificate into the AutoVue Java Virtual Machine (JVM).

The application server certificate must be imported into the JMV that AutoVue is using. To do so:

a. Obtain a copy of the application server's certificate by exporting it from the browser that you used to verify the VueLink HTTPS URL.

b. Save the copy of the certificate as a `.DER` format certificate file.

c. Use the JAVA keytool to import the certificate from the file into the JVM that is used by the AutoVue server.
For Example:

```
keytool -import -file <path to the .DER file> -keystore <path to the java cacerts file>
```

Make sure to restart the AutoVue server after importing the certificate.

5 Make sure to login to the UCM via HTTPS. If UCM is not leveraging the same application server as VueLink, then follow step 1 to enable SSL on the application server that UCM is using.

Appendix A: Creating a CAD Folio Template

If you run into problems importing the CAD Folio template shipped with VueLink, you can create the template with the following steps:

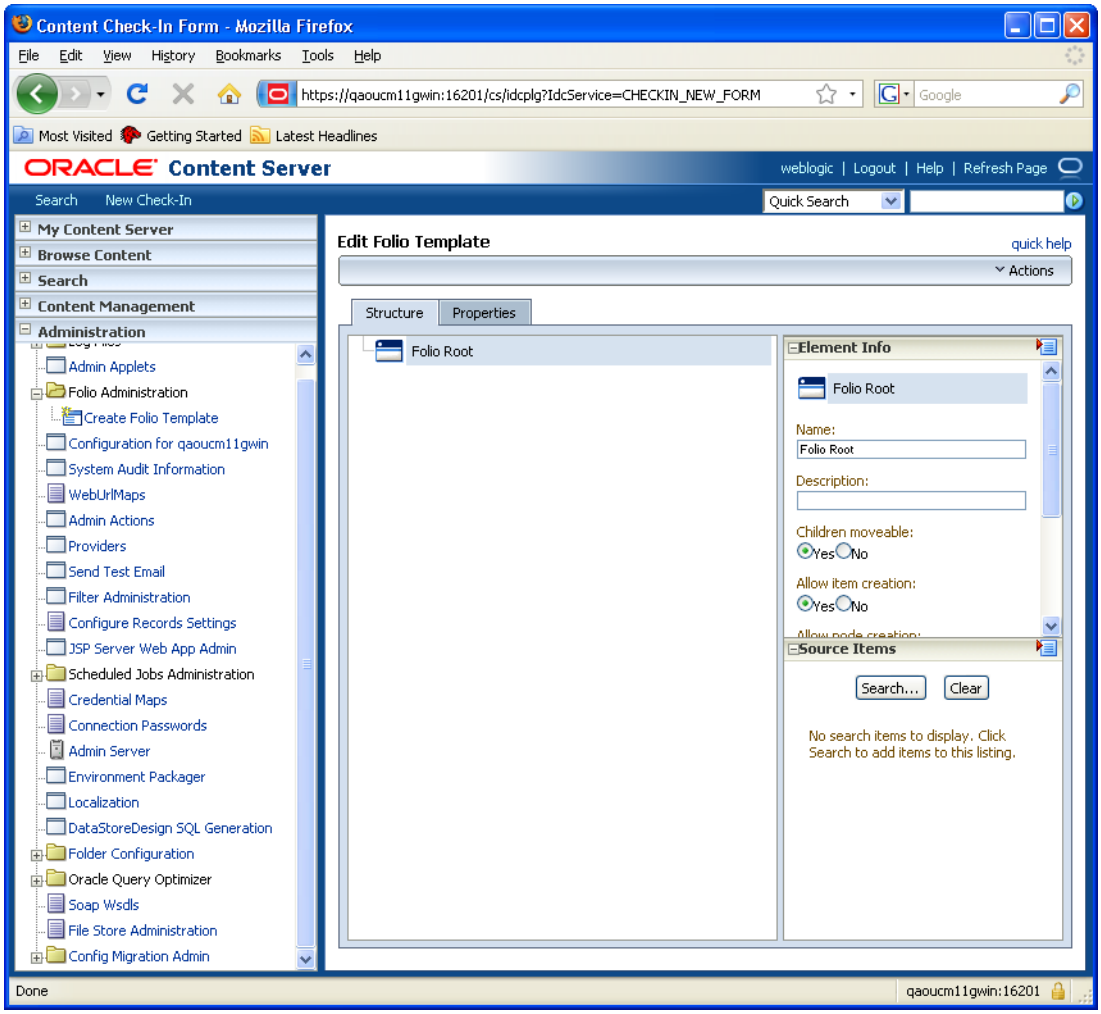
1 Verify that your UCM is installed properly.

2 Run a Web browser.

3 Login to Oracle UCM as Administrator.

4 From the **Administration** menu, select **Folio Administration,** and then select **Create Folio Template.**

The Edit Folio Template page appears.



5 Under the **Element Info** table on the right-section of the page, do the following:

a. Enter *CAD Folio Root* in the **Name** field.

b. Enter *Template for CAD with XRefs* in the **Description** field.

c. For the Children Moveable option, select **No.**

d. For the Allow Item Creation option, select **No.**

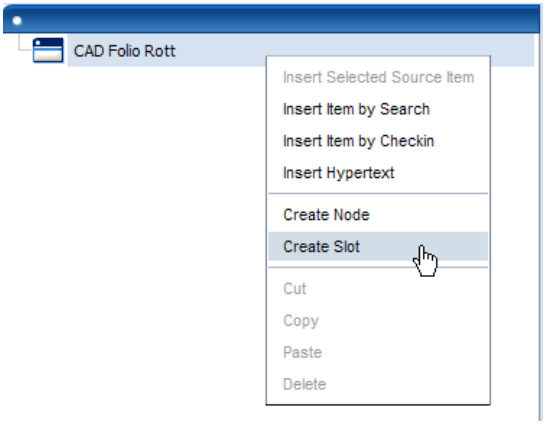
e. For the Allow Node Creation option, select **No.**

f. Enter *100* in the **Maximum Items** field.

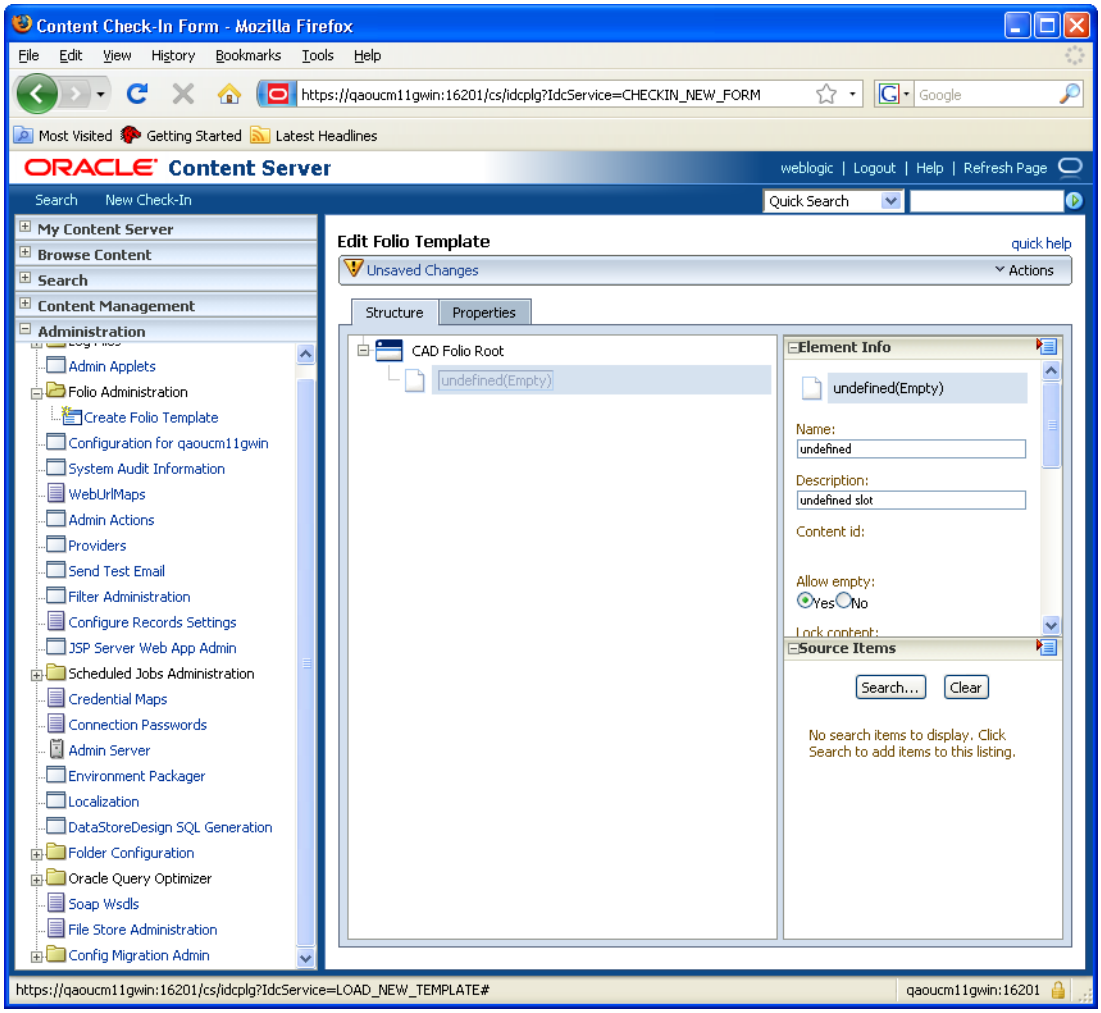
g. Enter *100* in the **Maximum Nodes** field.

The CAD Folio Root tree appears in the left section of the Structure tab and is assigned the new values.

6 Right-click the CAD Folio Root node**,** and select **Create Slot.**



An new slot appears as a child of the tree.



7 Under the **Element Info** table on the right-section of the page, do the following:

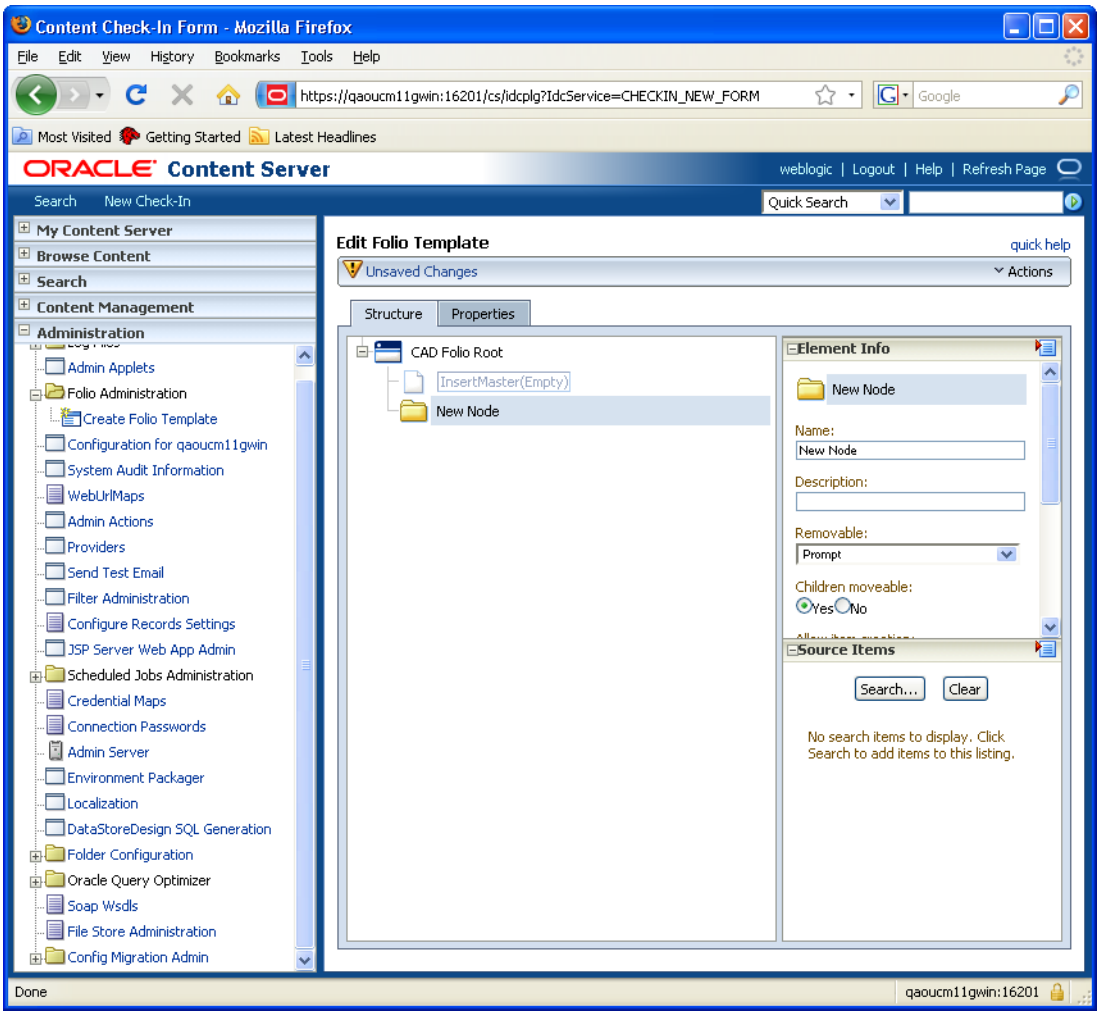
a. Enter *Insert Master* in the **Name** field.
b. Enter *Master File* in the **Description** field.
c. For the Allow Empty option, select **No.**
d. For the Lock Content option, select **No.**
e. For the Removable option, select **No.**
f. For the Allow External option, select **No.**
g. For the Allow Folio option, select **No.**
h. For the Clone Item option, select **No.**

The slot is renamed to Insert Master and is assigned the new values.

In a CAD structure, this slot will hold information about the top level file (for example, the master file for 2D or assembly file for 3D).

8 Right-click CAD Folio Root node, and select **Create Node.**

A new child node appears.



9 Under the **Element Info** table on the right-section of the page, do the following:

a. Enter *Insert XRefs* in the **Name** field.
b. Enter *XRefs* in the **Description** field.

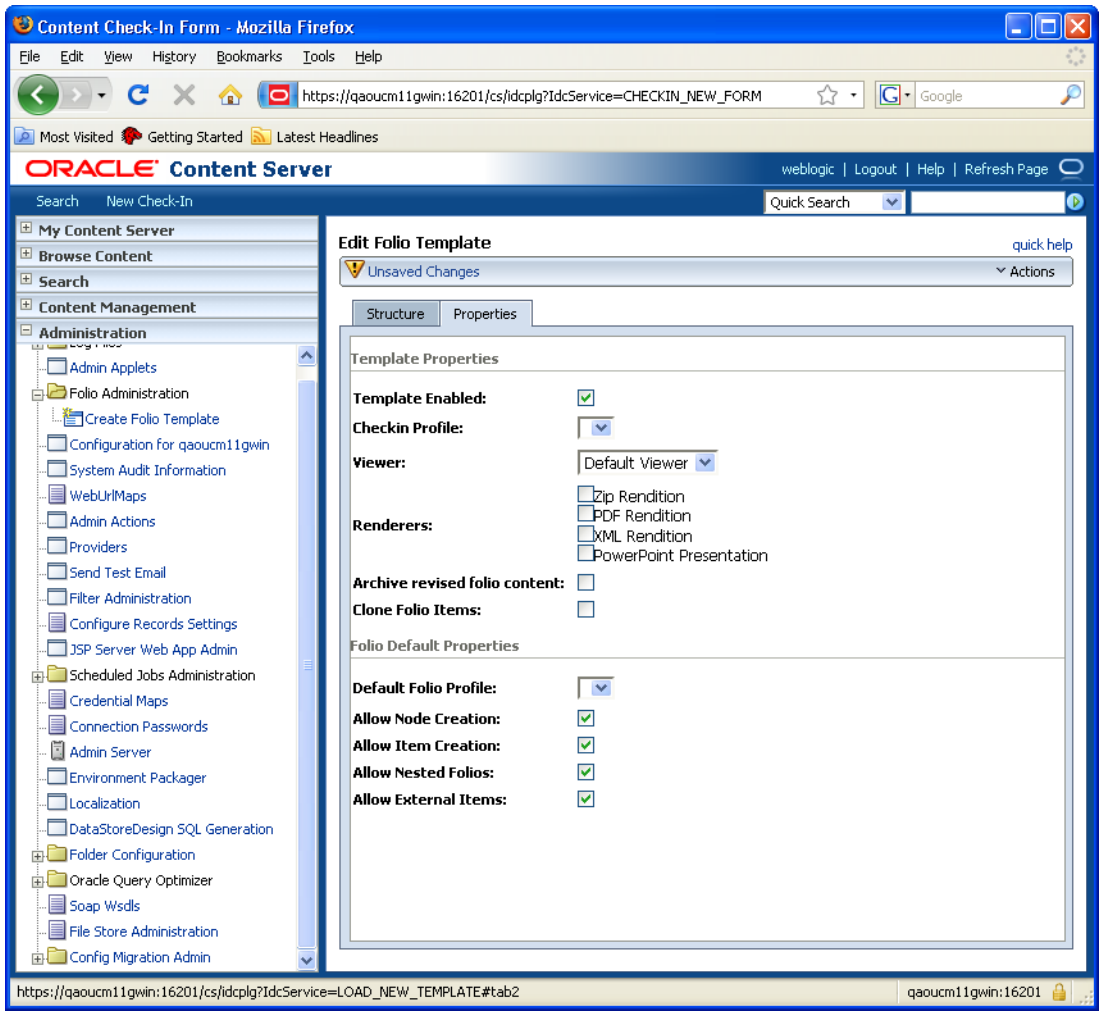
c. From the Removable list, select **Prompt.**
d. For the Children Moveable option, select **No.**
e. For the Allow Item Creation option, select **Yes.**
f. For the Allow Node Creation option, select **No.**
g. Enter *100* in the **Maximum Items** field.
h. Enter *100* in the **Maximum Nodes** field.

The node is renamed to Insert XRefs and is assigned the new values.

In a CAD structure, this node will hold information about files associated with the top level file (for example, parts for 3D).

Note: This node cannot contain other nodes or other Folios.

10 Click the **Properties** tab.



11 Enter the following information:

a. Select the **Template Enable** check box.

b. From the Viewer list, select **Default Viewer.**

c. For the Renderers option, select **zip rendition, pdf rendition,** and **XML rendition.**

d. Select the **Allow Node Creation, Allow Item Creation**, and **Allow Nested Folios** check boxes.

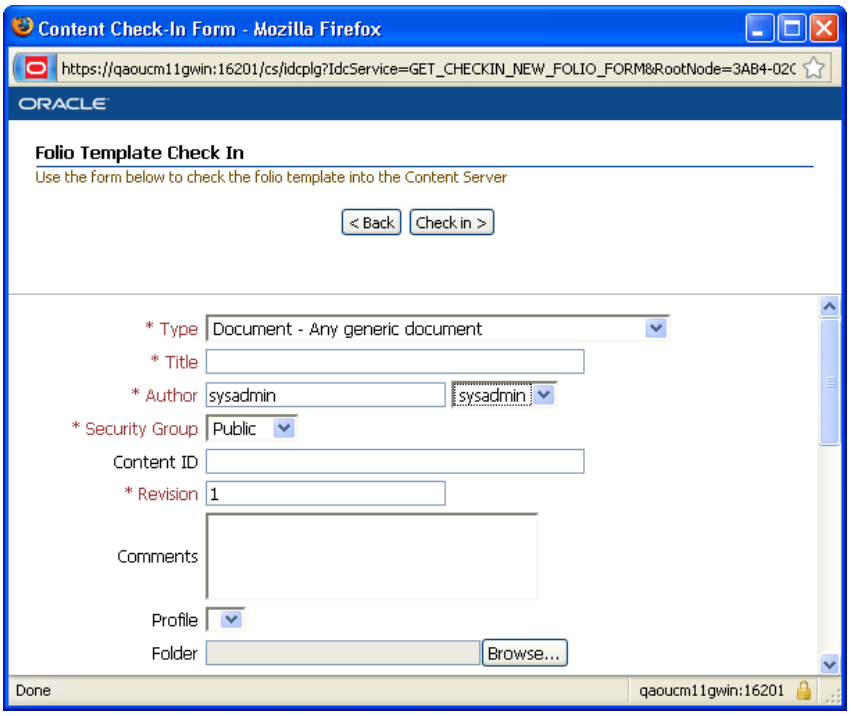
e. Make sure the Archive Revised Folio Content, Cone Folio Items, and Allow External Items check boxes are not selected.

12 From the **Actions** menu**,** select **Save Template.**

The Content Check in Form dialog appears.

13 From the Profile list, select **None,** and then click **Next.**

The Folio Template Check In page appears.



14 Enter the following information:

a. From the Type list, select a type.

b. Enter *Folio Template for CAD with XRefs* in the **Title** field.

c. Optionally, in the **Author** field, enter *sysadmin*, and from the Author list, select **sysadmin.**

d. From the Security Group list, select **Secure** or **Public.**

15 Click **Check in.**

Once the template is created, users will be able to create folios based on this template.

Appendix B: Supported Search Attributes

The following attributes, which are specified in web.xml, can be used as VueLink Advanced Search criteria:

Name	Type	Label	Description
dCollectionID	list	Folder	Searches for the ID of a folder inside UCM.
dDocType	text	Type	Searches for a document type inside UCM.
dSecurityGroup	text	Security Group	Searches for the UCM security group of the document.
dDocAuthor	text	Author	Searches for the author name of the document inside UCM.
xComments	text	Comments	Searches for comments inside documents records
dOutDate	Date	Expiration Date	Searches for the expiration date of a document in UCM.
xMarkup_BasedID	integer	Markup_BaseID	Searches for the document ID of the markup's base file inside UCM.
xMarkupCounter	integer	MarkupCounter	Searches for the number of markups inside UCM.
xReadOnly	boolean	Read Only	Searches the read-only status of the document inside UCM.

Appendix C: Configuring Intellistamp

Oracle AutoVue VueLink for Oracle UCM comes with a predefined stamp called **Oracle-sample** (a background image with the Oracle logo as a watermark). The stamp definition file, dmstamps.ini, is stored inside the WEB-INF\lib directory along with an additional image, stampimage.bmp.

You can create a new stamp with the Stamp Designer tool that is included in the **bin** directory of Oracle AutoVue, Client/Server deployment. Alternately, you can open dmstamp.ini in a text editor and change the attribute names or image file name.

If you move the dmstamp.ini file to a new location, you must update the stamp definition file path inside VueLink's web.xml (CSI_IntellistampDefLocation). You must also verify that the background image in dmstamp.ini matches the location change. The sample stamp image should be in the same folder as dmstamp.ini, but it can be moved to another directory. The dmstamp.ini file path can be absolute or relative to the VueLink application folder. the image path inside dmstamp.ini should be absolute or just a filename if the image is in the same folder as dmstamp.ini.

For more information on configuring CSI_IntellistampDefLocation, refer to **"Updating web.xml"**.

Make sure the account that is running the VueLink application has the read permission to the location that the stamp file and its associated images are stored.

Appendix D: Troubleshooting

Markups Cannot be Saved in Applet

When working in a file from UCM, you can add and save Markups. However, in the event a Markup file cannot be saved in the applet (it appears as *Untitled* in the Markup tree), you must re-index the UCM. To do so:

1 Login to Oracle UCM as Administrator.

2 From the **Administration** menu, select **Admin Applets**.

3 From the main page, select **Repository Manager**.
The Repository Manager dialog appears.

4 Select the Indexer tab.

5 In the Automatic Update Cycle section, click **Start**.
When the State field changes to *Finished*, proceed to the next step.

6 In the Collection Rebuild Cycle section, click **Start**.
The cycle is complete when the State field changes to *Finished*.

You may now add and save new markups to a file in UCM.

Running VueLink in Debug Mode

VueLink uses the apache log4j package for logging. The default configurations are set in the log4j.properties configuration file located in the WEB-INF\lib folder of the VueLink application. You can change the level and location of the output by modifying this file.

The following table shows the different levels of logging available.

Will Output Messages Of Level

Logger Level	DEBUG	INFO	WARN	ERROR	FATAL
DEBUG					
INFO					
WARN					
ERROR					
FATAL					
ALL					
OFF					

: No

: Yes

- If you set Logger Level to FATAL, then only output messages of level FATAL are logged in log4j file.
- If you set Logger Level to ERROR, then only output messages of level ERROR or FATAL are logged in log4j file.
- If you set Logger Level to DEBUG, then output messages of any level are logged in log4j file.]

For example, if you want to elevate the log to the DEBUG level, then set **`log4j.logger.com.cimmetry.vuelink`**=`DEBUG` inside the log4j.properties file.

VueLink messages are logged inside the file pointed to by the `log4j.appender.R.File` entry in log4j.properties.

For more information on log4j capabilities, refer to log4j documentation.

Appendix E: Restricting Access to a VueLink Web Application

The VueLink servlet does not require public access, it only needs to be accessed by UCM and the AutoVue server. To prevent unauthorized access to the VueLink servlet, it is recommended to tighten the deployment and limit access to the VueLink either through one of the following:

- A firewall in your environment
- An HTTP server (for example, Apache, IIS, and so on)
- A mechanism provided by the application server

If a firewall or an HTTP server is used, refer to their respective documentation on how to limit access to a resource to certain IP addresses. In this case, only access to the VueLink servlet, not the VueServlet, must be restricted.

The WebLogic application server includes a filtering mechanism to filter connections to the application server. The filter provided with WebLogic allows you to write a custom code for filtering. To use the filter, the VueLink servlet must be deployed on a different port than the one UCM is on and can be on the same or different domain of the WebLogic application server.

The follow are detailed steps on how to configure the filtering mechanism.

1 Open a Web browser.

2 Enter login credentials for the WebLogic Admin Console.

3 From the left page, select the domain that you want to configure (the domain that VueLink is deployed on).

4 Select **Security** and then **Filter**.

5 Select the Connection Logger Enabled checkbox to enable the logging of accepted messages. The Connection Logger logs successful connections and connection data in the server. This information can be used to debug problems relating to server connections.

6 In the Connection Filter field, specify the connection filter class to be used in the domain.

To configure the default connection, specify `weblogic.security.net.ConnectionFilterImpl`

7 In the Connection Filter Rules field, enter the syntax for the connection filter rules. The syntax is as follows:

```
targetAddress localAddress localPort action protocols
```

The following is the recommended rule set (assuming that the VueLink is deployed on port 7001):

```
# Allow access from the UCM machine (can be the VueLink host)
<ucm IP or hostname> * 7001 allow
# Allow access from the AutoVue machine
<autovue IP or hostname> * 7001 allow
# Refuse the http and https access for all other machines
<IP range to be restricted> * 7001 deny http https
```

Replace the `<ucm IP or hostname>` and `<autovue IP or hostname>` wit the actual hostname or IP address of the machines.

Replace the `<IP range to be rested>` with the range of IPs that should be prohibited from accessing the port that the VueLink is running on. If your network provides IPv6, it is recommended to use it instead of IPv4.

For more information on connection filter rules and syntax, refer to “Using Network Connection Filters” in the WebLogic documentation.

8 Click **Save**.

9 Restart the WebLogic Server so that your changes can take effect.

For more information, refer to the “Configuring Security for a WebLogic Domain” in the WebLogic documentation.

Note: If you accidentally enter rules that completely block access to the WebLogic server, and are no longer able to access the admin console, you must locate the config.xml file inside the WebLogic server machine (under the domain directory) and remove the `<connection-filter-rule>` parameters that deny access to the server from legitimate machines.

Feedback

Oracle products are designed according to your needs. We would appreciate your feedback, comments or suggestions. If at any time you have questions or concerns regarding Oracle VueLink for Oracle UCM, call or email us. Your input is an important part of the information used for revision.

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