



# **Agile Product Lifecycle Management**

Viewer Supplement

v9.2.2.4

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# Preface

The Oracle|Agile documentation set includes Adobe® Acrobat™ PDF files. The [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technology/documentation/agile.html) (<http://www.oracle.com/technology/documentation/agile.html>) contains the latest versions of the 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.

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

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

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

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## Readme

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

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## Agile Training Aids

Go to the [Oracle University Web page](http://www.oracle.com/education/chooser/selectcountry_new.html)

([http://www.oracle.com/education/chooser/selectcountry\\_new.html](http://www.oracle.com/education/chooser/selectcountry_new.html)) for more information on Agile Training offerings.

## Accessibility of Code Examples in Documentation

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

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## Introducing Viewer

**This chapter includes the following:**

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## 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 Oracle|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.

Feature or concept	Contained in this document
Java Client Navigation	<i>Getting Started with Agile PLM User Guide</i> , Chapter 2, "Navigating in Agile Java Client"
Web Client Navigation	<i>Getting Started with Agile PLM User Guide</i> , Chapter 3, "Navigating in Agile Web Client"
Relationships and rules between objects	<i>Getting Started with Agile PLM User Guide</i> , Chapter 5, "Working with Business Objects"
Attachment files Working with file folder objects File folder mass update Routing and reviewing file folders File validation (Handle Check Sum) Viewing and redlining file folder contents	<i>Getting Started with Agile PLM User Guide</i> , Chapter 9, "Navigating in Agile Web Client" and Chapter 10, "Working with File Folders"
Redlining through ECOx, MCOs and SCOs	<i>Product Collaboration User Guide</i> , Chapter 5, "Changes"

**Note** To find an Agile PLM document, choose Help > Manuals in the Java Client or the Web Client to display the Agile PLM documentation web page.

## 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.

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**Note** See “[Agile-specific Features and Functions](#) (on page 17)” 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.

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## About Viewer

Viewer can display many different file formats without their authoring applications. You can view files from many database, graphic, spreadsheet, word-processing, and 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; Viewer automatically identifies the type of file you are requesting it to read. The Agile administrator determines which types of files can be viewed by setting the Supported File Types property and Structured File Types property in the Agile Administrator module in Java Client.

**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 appropriate privileges that allow you to redline attachment files (for example, the Agile default role Markup for Self).

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 Viewer to mark up files as well as view them.

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**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.

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Some of Viewer's features are:

- **Flexible user-defined objects** — 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 Viewer online help for a detailed discussion of markup objects. Choose Help > Contents in the 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** — 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:

- Viewing Structured CAD Designs

This Agile PLM release supports the ability to view data, such as CAD data, stored in Agile as item structures. The typical use case is for viewing mechanical or electronic CAD assemblies saved into "DocuBOM" structures in Agile using the Engineering Collaboration (EC) CAD Connectors. See [Viewing File Folder Structured File Types](#) on page 21.

- Ability to Search and Browse Agile Data from within the Viewer

In previous releases, when entering the viewer for a more complex operation such as Compare, Cross Probe, or Digital Mockup, it was necessary to select all desired files in Agile PLM prior to the viewer starting. This release provides new Agile Search and Agile Browse buttons within the viewer commands, to retrieve additional files from within the viewer itself. See [Opening Agile Attachment Files from the Viewer Window](#) (on page 19).

- The Compare function has extended so the user can initiate the Agile PLM View command to view a particular file and the Viewer Compare command will contain a pre-loaded list of additional revisions or versions of the file to be compared against. This provides a simple process to perform repetitive Compare commands against multiple revisions or versions without leaving the viewer window. See [Comparing Revisions or Versions of a File](#) (on page 21).

## What's New in Agile PLM 9.2.2.4

- File folders and attachments:

- Bulk download of business object attachments in Web Client by using Get All Files button to download a zip file of all the Attachment table rows. Bulk download of file folder files in Web Client by using Actions > Get All Files to download a zip file of all the Files table rows. When using Advanced File Productivity components, the user can choose to either download the files to a specified directory or download a zip file.
- File folder Routing Slip tab is version-specific; each version can have a different set of approvers and observers.
- In Web Client, file folder Actions > Version Browser feature opens a version browser window which lists information about all versions of the file folder. You can select files in the Version Browser window to view or compare.
- The Checkin User field is available on the File Folders Title Block tab and the business object Attachments tab. Identifies the user who checked in the specified version.
- The Designs class is added to the File Folders base class to support an Agile PLM Engineering Collaboration (EC) CAD integration.
- Attached URLs can be up to 255 characters in length.
- A Version Browser is added to the Web Client File Folder class objects and Design class objects Actions menu. The Version Browser displays information about all versions of the File Folder or Designs object. You can select Version Browser rows to view or compare.

- Agile Viewer:

- Markup promotion for change-based redline markups allows you to promote or copy redline markups from previous versions to the current version.
- Markup promotion for Ad Hoc markups allows you to promote or copy Ad Hoc markups from previous version to the current version.
- Agile Viewer can view Design objects and their corresponding Design Structures in order to view 3D models.


## Viewer Window

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


### To start the Viewer in Java Client:

Double-click the attachment row.

Or

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

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

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### To start the Viewer in Web Client:

Click the file name link in the table.

Or

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

---

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

---

When you start Viewer, the main Viewer window appears.

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Note For more information about starting the Viewer, see [Opening Agile Attachment Files in the Viewer](#) (on page 17).

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## Viewing an Attachment Tab Row with Multiple Files

When viewing files from the Attachments tab of an Agile business object, if you view a single row that refers to a multiple-file file folder, the Select Files window appears. The Select Files window lists the files in that file folder and allows you to select one or more files that you want to view.

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Note For more information about starting the Agile Viewer, see [Opening Agile Attachment Files in the Viewer](#) (on page 17).

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## Understanding the Viewer

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

## Viewer Modes

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 25)". When you open a markup file, Markup mode starts automatically.

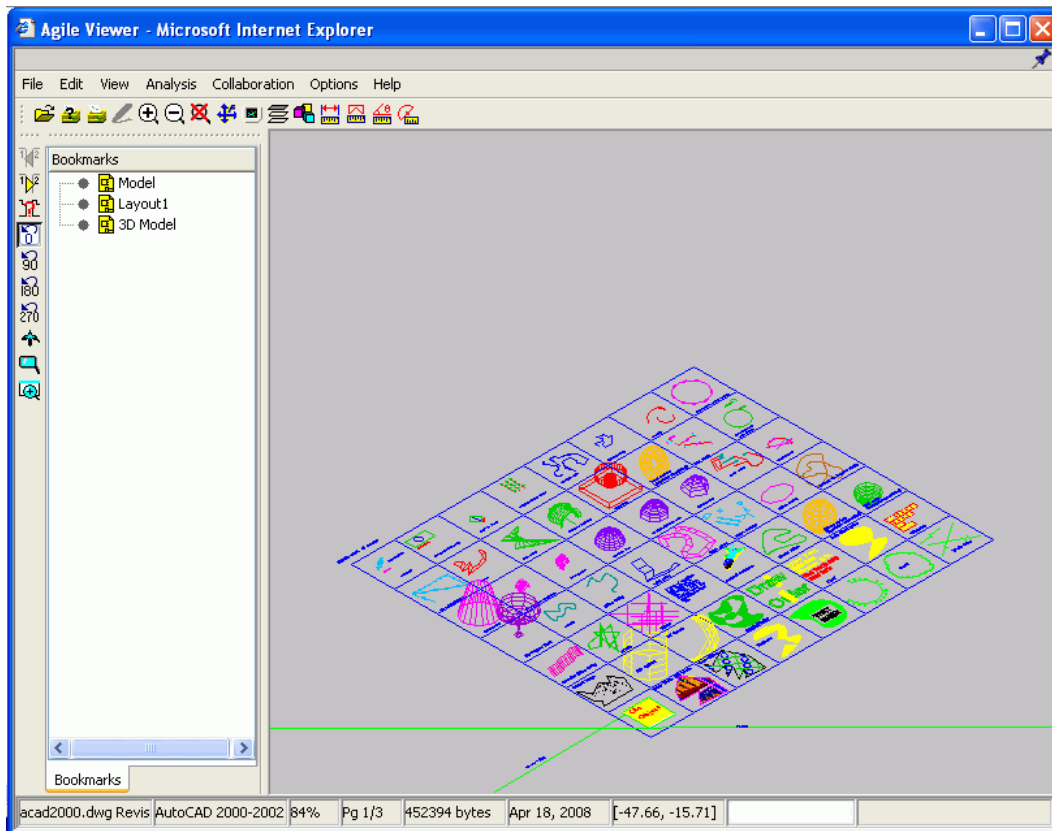
---

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 privileges that allow you to redline attachment files (for example the Agile default role, Markup for Self). Contact your Agile administrator if you have questions about your assigned roles and privileges.
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## Viewer Window Components

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



### Menu Bar

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


### Toolbars

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

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## 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.

### Viewing Files From Java Client


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

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

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

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


---

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


---

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

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

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

---

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

---


The Viewer opens and displays the selected files.

## Viewing Files From Web Client


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

1. Go to the Attachments tab of a business object that references the file.
2. Click the file name link in the attachments table.
  - If the attachment row refers to a file folder with only one file, the Viewer opens and displays that file.
  - If the attachment row refers to a multiple-file file folder, the Select Files window appears. Select one or more files to view and click Finish. The Viewer opens and displays the files you selected.

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

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


---

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


---

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

**To view a file from Web Client, Files tab:**

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

---

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

---

The Viewer opens and displays the selected files.

## Opening Agile Attachment Files from the Viewer Window

When the Viewer window is open, you can use the Viewer menus to select a different Agile attachment file to view without using the Java Client or Web Client Attachments tab commands.

The specific Viewer menu choices that are available to allow you to select an Agile attachment file depend upon the function you originally chose in Agile PLM when you opened the viewer (View, Cross Probe, Compare, Overlay, or Digital Mockup) and the file type of the currently viewed file.

---

**Note** Because the list of available Viewer menu selections for attachment file selection can vary, some of the following menu selections may not be available for you to choose in a specific Viewer session.

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The possible available Viewer menu selections that allow you to select another attachment file include:

- File | Open URL
- Analysis | Compare
- Analysis | Overlay
- Analysis | DMU
- Analysis | Cross Probe

When you choose one of these menu selections, in order to select the file you want to view or to add to the current analysis view, a File Open dialog appears. The Agile Browse button in the File Open dialog allows you to use your Agile Bookmarks to select a file. The Agile Search button in the File Open dialog allows you to perform a quick search and select the a file.

**To use your Agile Bookmarks to select an attachment file:**

1. Choose an available Viewer menu option:
  - File | Open URL
  - Analysis | Compare
  - Analysis | Overlay
  - Analysis | DMU
  - Analysis | Cross Probe
2. Follow any dialog prompts until the File Open dialog appears.

3. Click the Agile Browse button in the File Open dialog to display the DMS: File Open dialog. The DMS: File Open dialog displays your Agile Bookmarks in a tree structure.

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Note	If you have not defined any Bookmarks in Agile PLM, the Agile Browse button does not appear in the File Open dialog.
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4. Click + to expand a bookmark and display its item revisions or its file folder versions.
5. Click a revision or version row to highlight the file you want to view.
6. Click OK in the DMS: File Open dialog.  
The selected file name appears in the File Name field of the File Open dialog.
7. Click OK in the File Open dialog.  
The Viewer opens the selected file, or, if appropriate, adds the selected file to the current analysis function.

**To perform a quick search to select an attachment file:**

1. Choose an available Viewer menu option:
  - File | Open URL
  - Analysis | Compare
  - Analysis | Overlay
  - Analysis | DMU
  - Analysis | Cross Probe
2. Follow any dialog prompts until the File Open dialog appears.
3. Click the Agile Search button in the File Open dialog to display a Search dialog which allows you to run a quick search.
4. Define your search and click the Search button:
  - Class - Select an object class, for example, Items.
  - Search Parameter - Enter a text string or a number.  
  
 Agile PLM searches the object ID number attribute and the object Name or Description attribute. A Quick search behaves like a Contains search for text strings. The search criteria is treated as a single string and Agile PLM searches for names or descriptions that contain the search parameter string. In the case of ID numbers, Agile PLM searches for an exact match, however, you may use wildcard characters to specify part of an ID number as a search criteria.
  - Search Attachment Content - Set this parameter to Yes to search the contents of the attachment files as well.
5. In the Search Results table, click the + next to the object number to expand the list of attachment files for that object.
6. Click a revision row or a version row to select the file you want to view.
7. Click the Load File button.  
The selected file name appears in the File Name field of the File Open dialog.
8. Click OK in the File Open dialog.  
The Viewer opens the selected file, or, if appropriate, adds the selected file to the current

analysis function.

## Comparing Revisions or Versions of a File

You can view a file from an item Attachments tab or a file folder Files tab then select, from the Viewer window, other item revisions or file folder versions of the file to compare against. After comparing one revision or version, you may select another, comparing multiple revisions or versions of the file from within the Viewer window.

### To compare multiple item revisions of an attached file:

1. On the item Attachments tab, select the file you want to compare.
2. Choose View from the tab menu. The Viewer opens, displaying the selected file.
3. In the Viewer menu, choose Analysis | Compare. The File Open dialog appears.
4. Check the Document Versions checkbox, if it is not already checked.
5. Use the drop-down menu to select another revision of the file for comparison.

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Note	Only released item revisions appear in the drop-down list. To compare the attachment of a pending revision, view the pending revision file, then use Analysis   Compare to select released revisions for comparison.
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6. Click OK. The Viewer opens the selected version in second window and displays the differences between the two files in a third window.
7. To compare another revision, choose File | Exit Compare Mode in the Viewer menu.
8. Repeat steps 3 through 6 to select another item revision.

### To compare multiple file folder versions of a file:

1. On the file folder Files tab, select the file you want to compare.
2. Choose View from the tab menu. The Viewer opens, displaying the selected file.
3. In the Viewer menu, choose Analysis | Compare. The File Open dialog appears.
4. Check the Document Versions checkbox, if it is not already checked.
5. Use the drop-down menu to select another file folder version of the file for comparison.
6. Click OK. The Viewer opens the selected version in second window and displays the differences between the two files in a third window.
7. To compare another file version, choose File | Exit Compare Mode in the Viewer menu.
8. Repeat steps 3 through 6 to select another file folder version.

## Viewing File Folder Structured File Types

### Viewing Structured File Types

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Note	Viewing structured data in a File folders class object relies on the DocuBOM or the Relationships tab to resolve related objects in the structure.
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CAD data can be stored in Agile PLM using document object BOM structures. This is usually accomplished automatically when Agile PLM and EC are integrated using EC CAD connectors. A

CAD *assembly* file is attached to an Agile document object, and the subordinate CAD *part* files are also attached to Agile document objects. The *part* file document objects appear on the BOM tab of the CAD assembly document object, thus creating a hierarchical file structure for the attached files.

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Note	Files types that are used in structured file hierarchy are specified in Agile Administrator as Structured File Types. All other file types are specified as Supported File Types.
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When you open an Structured File Type assembly attachment, Agile PLM automatically opens the subordinate *part* files in the Viewer also, allowing you to view the entire CAD design. This process is seamless and requires no action by the user other than initiating the view function for the assembly file.

The following list provides details about how Agile PLM extracts Structured File Type files from the document BOM structure for CAD design viewing:

- Agile PLM extracts only Structured File Type files. If an attached file type is specified on the Supported File Types list, Agile PLM does not traverse the document structure to find other files.
- If the file type is on the Structure File Type list, then Agile PLM will traverse all levels of the document hierarchy, starting with the selected file, and extract other files necessary to build the complete model.
- In order to avoid pulling out unnecessary files, the viewing logic makes use of the Attachment Type attribute on the document's Attachments tab. If there is a value in this attribute (such as SOURCE) for the originally selected file attachment, then only files whose Attachment Type attribute matches this value will be extracted. If there is no value in the Attachment Type attribute, then all files within the structure hierarchy will be extracted.
- If there are multiple file attachments with the matching value of Attachment Type on the same document, they will all be extracted and sent to the Viewer. This includes the document from which the view operation was initiated.
- If any given document in the hierarchy does not have any file attachments, or any with the correct value of Attachment Type, the extraction process does not stop but simply continues down the tree.
- The Agile administrator may have configured Agile PLM to use the CAD Revision BOM attribute. This is a technique, principally used by the standard Agile EC CAD Connectors, to provide an As Saved fixed BOM resolution for CAD designs. If this is enabled, when you view a past revision of a design it will appear exactly as it was saved. If not, the view may differ slightly if child components have been revisioned in the meantime (that is, standard Agile BOM resolution logic is followed).
- You may select any document revision for viewing, including a pending revision. If the CAD Revision attribute is enabled, then viewing a pending Rev will display any active pending Revs within the structure that were saved from CAD.
- All Agile Viewer operations support structured file types, including View, Markup, Compare, Cross Probe, Overlay, and Digital Mockup.

## Viewing Design Object Structures

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Note	Viewing structured data in a Design data model class object relies on the the Structure tab to resolve related objects in the structure.
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When you open a CAD assembly file in a Design object, Agile PLM also automatically opens the subordinate CAD part files in the Viewer, allowing you to view the entire CAD design. Agile PLM uses the assembly structure, as defined on the Structure tab of the Design object and the Structure tabs of its child Design objects.

This process is seamless and requires no action by the user other than initiating the view function for the assembly file.

The following list provides details about how Agile PLM extracts Structured File Type files from the Design object and its Structure table for CAD design viewing:

- The file type of the Design object selected file must be included in the Structured File Types list in Agile Administrator.
- The structure used to extract files is explicitly set on the Design object Structure tab.
- Agile PLM identifies which Design objects files to extract by the following methods:
  - If the value of the Category attribute from any file row of a child Design matches the Category value of the starting file, the file is extracted.
  - If the selected starting Design object file has no value for Category, then all files in all child Designs are extracted, including the starting Design object.
- If multiple file rows on a Design object structure have the same Category value as the starting file, they are all extracted, at any level in the tree.
- If the user selects multiple Design object files and chooses View, each selected file is interpreted separately, based on Design structure viewing logic.
- When a Design object is from a business object's Attachment tab, Agile PLM uses the rules for viewing Designs, not DocuBOMs. That is, Design object viewing rules are always applied to Design objects whether the viewing action is initiated from a Design object or from the business object Attachments tab.

## Using the Version Browser

When a File Folder object is open, you can view information about all versions of the File Folder in the Version Browser.

When a Design object is open, you can view information about all versions of the Design in the Version Browser.

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**Note** The Version Browser is available only in Web Client.

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### To open the Version Browser:

1. In the Actions menu, choose Version Browser. The Version Browser opens.

The Version Browser displays the following information about each version:

Version Browser Column	Description
Approval	An <b>Awaiting Approval</b> icon  in this column indicates that the version is awaiting approval; the Routing Slip for that version lists users who have not yet signed off.
Version	The version number.

Version Browser Column	Description
Checkin Date Checkin User	The date the version was checked in and the user who performed the checkin. When the version is checked out, these fields are blank.
Change Info	indicates how the version was modified before it was checked in.  <b>Files</b> indicates that the object's files were modified, for example, files were replaced, added, or deleted.  For Design objects, <b>Structure</b> indicates that the Design's <b>Structure</b> tab was modified.
Label, Revision, Revision Date	These are version-specific editable fields used with Design data model objects.


**Actions you can initiate in the Version Browser:**

- View Files: Select any version row and click View to view the file or files in the Agile Viewer.
- Compare Files: For single-file versions, select two version rows, and choose Compare in the View button drop-down list. The selected files are compared in the Agile Viewer.



## Accessing Different File Versions from the Business Object Attachments Tab

You can get, open, view, and print any version of an attachment file from the Attachments tab of the business object.

You can easily access history without clicking through to the File Folder object. This is useful when a single file is being modified and accessed by multiple people/different functions. For instance, user can easily trace and identify which versions another user made their edits in - this is identified from version create date and checkout user.


The Versions dialog displays, for each version, the Version Creation Date (date the version was created), whether that version has redlines (indicated by the Has Been Redlined  icon), and the Checkout User (user who created that version). This allows you to easily see the history of an attachment from the Attachments tab, including who modified the file, and when it was modified.

**To switch between versions of file folders from an object's Attachments tab in Java Client:**

1. On the Attachments tab, select one or more attachment row that you want to access.
2. Click the Show Versions button . The Versions dialog appears.
3. Select the version row or rows that you want to access.
4. Click the appropriate action button (Get, Open, View, or Print).
5. Optionally, click the Has Been Redlined  icon to open the viewer and display the redlines.
6. Optionally, select two version rows, then choose Compare or Overlay in the View action button drop-down menu.



**To switch between versions of file folders from an object's Attachments tab in Web Client:**

1. On the Attachments tab, click the Show Versions button  in the attachment row you want and the Versions dialog appears.
2. In the version row that you want to access, click the appropriate action button (Get, View, or Print).
3. Optionally, select two version rows, then choose Compare or Overlay in the View action button drop-down menu.

## Ad Hoc Markups

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

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

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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 28)).

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.

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.
2. When the 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** 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

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### 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 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 Affected Items tab, click the Do Redlining button  (or Has been redlined button ) next to the item to open the Redlines page.
3. 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.)
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 File(s)  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.

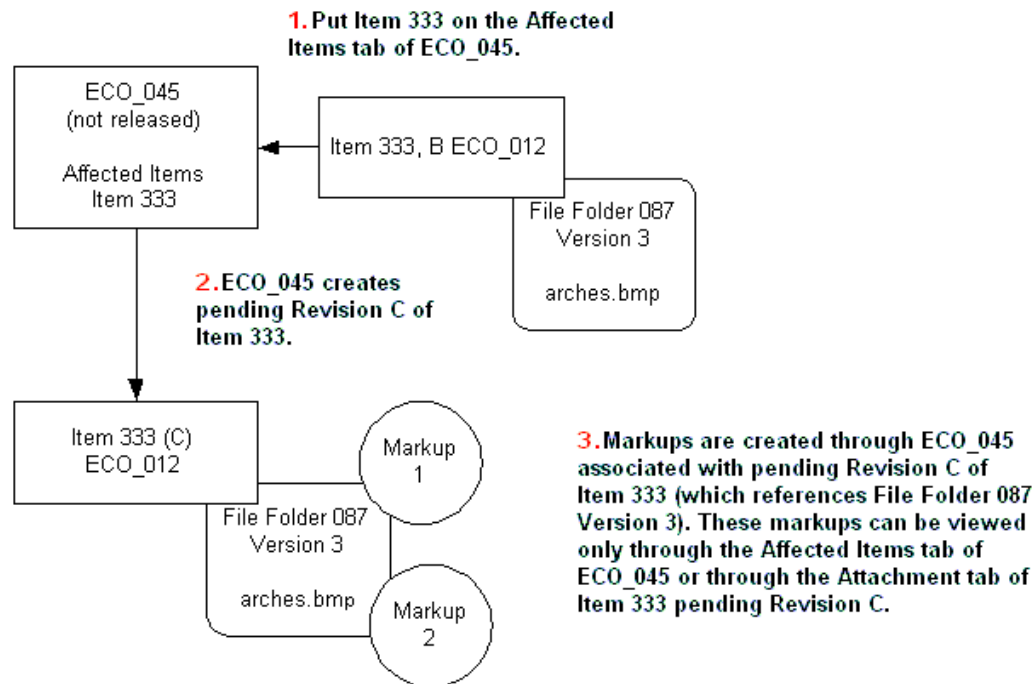
---

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

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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.

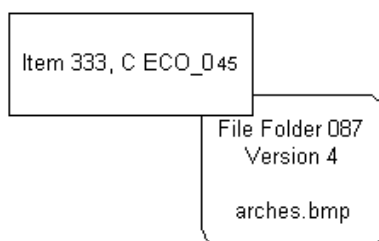
See also *Product Collaboration User Guide* and *Getting Started with Agile PLM User Guide*.



**4. ECO\_045 is reviewed, approved, and released.**

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

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



**6. To view the redlined version 3 of arches.bmp, use the Show Versions feature on the Attachments tab of Released Item 333 Revision C or on the Redline Attachments tab of ECO\_045. Click (Web Client) or double-click (Java Client) the Has Been Redlined icon in the version history dialog table to view arches.bmp, Version 3, and its markups.**

# Marking Up Documents

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

## Markup Promotion

Markup promotion is the ability to bring forward, or promote:

- Change-based markups from previous change orders to the current change order.
- Ad-Hoc markups from older file folder versions to the newer versions.

This allows you to revalidate older markups against a new design.

## Markup Promotion for Change-Based Markups





### To promote change-based markups in Java Client:

1. Open the change order and display the Affected Items tab.
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 Viewer opens, enter Markup mode. In the Viewer File menu, choose the Markup command.
  4. In the Viewer File menu, choose the Open command.  
The Markup Files dialog appears
  5. Click the All Revisions checkmark and all valid markups are displayed.  
The available markups are associated to files that have the same file extension as the file you are viewing.
  6. Select the markup files you want to promote to the current markup.
  7. Click OK.
  8. The promoted markups are displayed in the file you are currently viewing.
  9. To save the promoted markups with the change order revision, save the markups in the Viewer before exiting the Viewer.

#### To promote change-based markups in Web Client:

1. Open the change order and display the Affected Items tab.
2. On the Affected Items tab, click the Do Redlining button  (or Has been redlined button ) next to the item to open the Redlines page.
3. 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.)
4. When the Viewer opens, enter Markup mode. In the Viewer File menu, choose the Markup command.
5. In the Viewer File menu, choose the Open command.  
The Markup Files dialog appears
6. Click the All Revisions checkmark and all valid markups are displayed.  
The available markups are associated to files that have the same file extension as the file you are viewing.
7. Select the markup files you want to promote to the current markup.
8. Click OK.
9. The promoted markups are displayed in the file you are currently viewing.
10. To save the promoted markups with the change order revision, save the markups in the Viewer before exiting the Viewer.



## Markup Promotion for Ad-Hoc Markups

#### To promote file folder ad hoc mark ups in Java Client:

1. Open the file folder object and display the Files tab.
2. 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. When the Viewer opens, enter Markup mode. In the Viewer File menu, choose the Markup command.
4. In the Viewer File menu, choose the Open command.  
The Markup Files dialog appears.
5. Click the All Revisions checkmark and all valid markups are displayed.  
The available markups are associated to files that have the same file extension as the file you are viewing.
6. Select the markup files you want to promote to the current markup.
7. Click OK.  
The promoted markups are displayed in the file you are currently viewing.
8. To save the promoted markups with the current file folder version, save the markups in the Viewer

**To promote file folder ad hoc mark ups in Web Client:**

1. Open the file folder object and display the Files tab.
2. 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. When the Viewer opens, enter Markup mode. In the Viewer File menu, choose the Markup command.
4. In the Viewer File menu, choose the Open command.  
The Markup Files dialog appears.
5. Click the All Revisions checkmark and all valid markups are displayed.  
The available markups are associated to files that have the same file extension as the file you are viewing.
6. Select the markup files you want to promote to the current markup.
7. Click OK.  
The promoted markups are displayed in the file you are currently viewing.
8. To save the promoted markups with the current file folder version, save the markups in the Viewer before exiting the Viewer.
9. before exiting the Viewer.

## 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 33).
- 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 Viewer menu bar.

## 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 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.

For details about about how Agile PLM views 3D CAD assemblies, see:

- [Viewing File Folder Structured File Types](#) on page 21.
- [Viewing Design Object Structures](#) on page 22.

## 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 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.

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

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<b>Note</b>	The Agile administrator must specify the ECAD file extension in the Supported Files Types list in Agile Administrator for you to view the ECAD files.
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You can select both needed files from the same Attachments tab or the same file folder Files tab from

which you launch the Cross Probe action. Or, you can select one file on the current tab and then search for the remaining file from the attachments of any other object.

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

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

**To run Cross Probing:**

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

Each file is displayed in a separate viewer window.

3. Begin cross probing.

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

## Cross Probing in Java Client and Web Client

**To run Cross Probing:**

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

Each file is displayed in a separate viewer window.

3. Begin cross probing.

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

**To run Cross Probing By Search:**

1. Display the Attachments tab or the Files tab.
2. Select a file row you want to work with and choose:
  - Java Client: View File(s) > By Search > Cross Probe.  
The Select Files dialog appears, with three Search tabs.
  - Web Client: View > By Search > Cross Probe.

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

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

Use any of the following search methods:

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

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

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

Each file is displayed in a separate viewer window.

8. Begin cross probing.

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

## Initiate Cross Probing in the Agile Viewer

To initiate cross probing in the Agile Viewer, you must first select and view an appropriate file, that is, a file type that can be used for cross probing analysis.

### **View an appropriate file for cross probing:**

1. Display the Attachments tab or the Files tab.
2. Select a file row you want to work with and choose:
  - Java Client: View Files(s)
  - Web Client: View

The Agile Viewer opens and displays the selected file.

3. In the Agile Viewer Analysis menu, choose Cross Probe.

The Agile Viewer File Open dialog appears.

4. Use one of the following File Open dialog methods to select a file for cross probing:
  - Browse to browse your local directories to select and open files from the Agile Viewer window.
  - Agile Browse to use Agile bookmarks to open files from the Agile Viewer window.
  - Search to perform an Agile Quick Search to select an open files from the Agile Viewer window.

**Browse to browse your local directories to select an attachment file:**

1. Click the Browse button in the File Open dialog to display File Open dialog.
2. Use the Look in: drop-down list to select the directory you want.
3. Select the file you want and click Open.
4. Click OK in the File Open dialog.

The Viewer opens the selected file, or, if appropriate, adds the selected file to the current analysis function.

**Agile Browse to use your Agile Bookmarks to select an attachment file:**

1. Click the Agile Browse button in the File Open dialog to display the DMS: File Open dialog.
2. The DMS: File Open dialog displays your Agile Bookmarks in a tree structure.

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Note	If you have not defined any Bookmarks in Agile PLM, the Agile Browse button does not appear in the File Open dialog.
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3. Click + to expand a bookmark and display its item revisions or its file folder versions.
4. Click a revision or version row to highlight the file you want to view.
5. Click OK in the DMS: File Open dialog.

The selected file name appears in the File Name field of the File Open dialog.

6. Click OK in the File Open dialog.

The Viewer opens the selected file, or, if appropriate, adds the selected file to the current analysis function.

**Agile Search to perform a quick search to select an attachment file:**

1. Click the Agile Search button in the File Open dialog to display a Search dialog which allows you to run a quick search.
2. Define your search and click the Search button:
  - Class - Select an object class, for example, Items.
  - Search Parameter - Enter a text string or a number.

Agile PLM searches the object ID number attribute and the object Name or Description attribute. A Quick search behaves like a Contains search for text strings. The search criteria is treated as a single string and Agile PLM searches for names or descriptions that contain the search parameter string. In the case of ID numbers, Agile PLM searches for an exact match, however, you may use wildcard characters to specify part of an ID number as a search criteria.

- Search Attachment Content - Set this parameter to Yes to search the contents of the attachment files as well.
3. In the Search Results table, click the + next to the object number to expand the list of attachment files for that object.
  4. Click a revision row or a version row to select the file you want to view.
  5. Click the Load File button.

The selected file name appears in the File Name field of the File Open dialog.

6. Click OK in the File Open dialog.

The Viewer opens the selected file, or, if appropriate, adds the selected file to the current analysis function.

## Comparing Files

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

For detailed information about file comparison features, see the 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 and Web Client

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

### To initiate comparing files:

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

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

For more information about compare file features and options, choose Help > Contents in the viewer menu bar.

## Comparing Files By Search

The View > By Search > Compare command allows you to

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

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

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Note	For item objects, Introductory revisions and unreleased pending revisions do not appear in the related files list.
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**To initiate comparing files by Search :**

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

The Compare Files By Search dialog appears with three search tabs.

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

Use any of the following search methods:

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

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

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

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Note	For item objects, Introductory revisions and unreleased pending revisions do not appear in the related files list.
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- If the selected search object is a business object, check the Show Matching File Types Only checkbox to display only the related files that are the same file type as the file you with which you want to compare.
6. When you are finished, Click OK.

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

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

information about compare file features and options, choose Help > Content in the viewer menu bar.

## Initiate Compare in the Agile Viewer

To initiate comparing files in the Agile Viewer, you must first select and view an appropriate file, that is, a file type that can be used for compare analysis.

### View an appropriate file for compare:

1. Display the Attachments tab or the Files tab.
2. Select a file row you want to work with and choose:
  - Java Client: View Files(s)
  - Web Client: View

The Agile Viewer opens and displays the selected file.

3. In the Agile Viewer Analysis menu, choose Compare.

The Agile Viewer File Open dialog appears.

4. Use one of the following File Open dialog methods to select a file to compare:
  - Browse to browse your local directories to select and open files from the Agile Viewer window.
  - Agile Browse to use Agile bookmarks to open files from the Agile Viewer window.
  - Search to perform an Agile Quick Search to select an open files from the Agile Viewer window.

### Browse to browse your local directories to select an attachment file:

1. Click the Browse button in the File Open dialog to display File Open dialog.
2. Use the Look in: drop-down list to select the directory you want.
3. Select the file you want and click Open.
4. Click OK in the File Open dialog.

The Viewer opens the selected file, or, if appropriate, adds the selected file to the current analysis function.

### Agile Browse to use your Agile Bookmarks to select an attachment file:

1. Click the Agile Browse button in the File Open dialog to display the DMS: File Open dialog.
2. The DMS: File Open dialog displays your Agile Bookmarks in a tree structure.

Note	If you have not defined any Bookmarks in Agile PLM, the Agile Browse button does not appear in the File Open dialog.
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3. Click + to expand a bookmark and display its item revisions or its file folder versions.
4. Click a revision or version row to highlight the file you want to view.
5. Click OK in the DMS: File Open dialog.

The selected file name appears in the File Name field of the File Open dialog.

6. Click OK in the File Open dialog.

The Viewer opens the selected file, or, if appropriate, adds the selected file to the current

analysis function.

**Agile Search to perform a quick search to select an attachment file:**

1. Click the Agile Search button in the File Open dialog to display a Search dialog which allows you to run a quick search.
2. Define your search and click the Search button:
  - Class - Select an object class, for example, Items.
  - Search Parameter - Enter a text string or a number.

Agile PLM searches the object ID number attribute and the object Name or Description attribute. A Quick search behaves like a Contains search for text strings. The search criteria is treated as a single string and Agile PLM searches for names or descriptions that contain the search parameter string. In the case of ID numbers, Agile PLM searches for an exact match, however, you may use wildcard characters to specify part of an ID number as a search criteria.

- Search Attachment Content - Set this parameter to Yes to search the contents of the attachment files as well.
3. In the Search Results table, click the + next to the object number to expand the list of attachment files for that object.
  4. Click a revision row or a version row to select the file you want to view.
  5. Click the Load File button.

The selected file name appears in the File Name field of the File Open dialog.

6. Click OK in the File Open dialog.

The Viewer opens the selected file, or, if appropriate, adds the selected file to the current analysis function.

## Overlaying Files

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

## Overlaying Files in Java Client and Web Client

**To initiate overlaying files:**

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



- Web Client: View > Overlay.

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

#### **To initiate overlaying files By Search:**

1. Display the Attachments tab or the Files tab.
2. Select a file row you want to work with and choose:
  - Java Client: View File(s) > By Search > Overlay.  
The Select Files dialog appears, with three Search tabs.
  - Web Client: View > By Search > Overlay.  
The View Files by Search dialog appears, with three Search tabs.
3. The search dialog allows you to search for any business object (for example, items or manufacturer parts) and select the attachments of those objects to use to overlay.

Use any of the following search methods:

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

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

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

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

## **Initiate Overlay in the Agile Viewer**

To initiate overlaying files in the Agile Viewer, you must first select and view an appropriate file, that is, a file type that can be used for overlay analysis.

#### **View an appropriate file for overlay analysis:**

1. Display the Attachments tab or the Files tab.
2. Select a file row you want to work with and choose:

- Java Client: View Files(s)
- Web Client: View

The Agile Viewer opens and displays the selected file.

3. In the Agile Viewer Analysis menu, choose Overlay.

The Agile Viewer File Open dialog appears.

4. Use one of the following File Open dialog methods to select a file to overlay:
  - Browse to browse your local directories to select and open files from the Agile Viewer window.
  - Agile Browse to use Agile bookmarks to open files from the Agile Viewer window.
  - Search to perform an Agile Quick Search to select an open files from the Agile Viewer window.

**Browse to browse your local directories to select an attachment file:**

1. Click the Browse button in the File Open dialog to display File Open dialog.
2. Use the Look in: drop-down list to select the directory you want.
3. Select the file you want and click Open.
4. Click OK in the File Open dialog.

The Viewer opens the selected file, or, if appropriate, adds the selected file to the current analysis function.

**Agile Browse to use your Agile Bookmarks to select an attachment file:**

1. Click the Agile Browse button in the File Open dialog to display the DMS: File Open dialog.
2. The DMS: File Open dialog displays your Agile Bookmarks in a tree structure.

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Note	If you have not defined any Bookmarks in Agile PLM, the Agile Browse button does not appear in the File Open dialog.
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3. Click + to expand a bookmark and display its item revisions or its file folder versions.
4. Click a revision or version row to highlight the file you want to view.
5. Click OK in the DMS: File Open dialog.

The selected file name appears in the File Name field of the File Open dialog.

6. Click OK in the File Open dialog.

The Viewer opens the selected file, or, if appropriate, adds the selected file to the current analysis function.

**Agile Search to perform a quick search to select an attachment file:**

1. Click the Agile Search button in the File Open dialog to display a Search dialog which allows you to run a quick search.
2. Define your search and click the Search button:
  - Class - Select an object class, for example, Items.
  - Search Parameter - Enter a text string or a number.

Agile PLM searches the object ID number attribute and the object Name or Description

attribute. A Quick search behaves like a Contains search for text strings. The search criteria is treated as a single string and Agile PLM searches for names or descriptions that contain the search parameter string. In the case of ID numbers, Agile PLM searches for an exact match, however, you may use wildcard characters to specify part of an ID number as a search criteria.

- Search Attachment Content - Set this parameter to Yes to search the contents of the attachment files as well.
3. In the Search Results table, click the + next to the object number to expand the list of attachment files for that object.
  4. Click a revision row or a version row to select the file you want to view.
  5. Click the Load File button.  
The selected file name appears in the File Name field of the File Open dialog.
  6. Click OK in the File Open dialog.  
The Viewer opens the selected file, or, if appropriate, adds the selected file to the current analysis function.

## 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 Viewer menu bar.

## Real-Time Collaboration

For detailed information about collaboration features, refer to the viewer online help. Choose Help > Contents in the 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 the appropriate privileges that allow you to redline attachment files (for example, the Agile

default role Markup for Self).

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 the appropriate privileges that allow them to redline attachment files (for example, the Agile default role Markup for Self). 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.

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<b>Note</b>	In order to use the collaboration feature all users must connect to the same Agile Viewer server. All users must specify, in their user profile, Preferences tab, under System Preferences, the same Preferred File Manager setting.
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## Digital Mockup

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

### Digital Mockup in Java Client and Web Client

#### To initiate Digital Mockup of files:

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

The files are loaded into the same 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 Viewer menu bar.

**To initiate Digital Mockup of files:**

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

The files are loaded into the same 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 Viewer menu bar.

**To initiate Digital Mockup of files By Search:**

1. Display the Attachments tab or the Files tab.
2. Select a file row you want to work with and choose:
  - Java Client: View File(s) > By Search > Digital Mockup.  
The Select Files dialog appears, with three Search tabs.
  - Web Client: View > By Search > Digital Mockup.

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

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

Use any of the following search methods:

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

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

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

The files are loaded into the same Viewer workspace.

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

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

## Initiate Mockup (DMU) in the Agile Viewer

To initiate DMU analysis of files in the Agile Viewer, you must first select and view an appropriate file, that is, a file type that can be used for DMU analysis.

### View an appropriate file for DMU analysis:

1. Display the Attachments tab or the Files tab.
2. Select a file row you want to work with and choose:
  - Java Client: View Files(s)
  - Web Client: View

The Agile Viewer opens and displays the selected file.

3. In the Agile Viewer Analysis menu, choose DMU.

The Agile Viewer File Open dialog appears.

4. Use one of the following File Open dialog methods to select files for DMU analysis:
  - Browse to browse your local directories to select and open files from the Agile Viewer window.
  - Agile Browse to use Agile bookmarks to open files from the Agile Viewer window.
  - Search to perform an Agile Quick Search to select an open files from the Agile Viewer window.

### Browse to browse your local directories to select an attachment file:

1. Click the Browse button in the File Open dialog to display File Open dialog.
2. Use the Look in: drop-down list to select the directory you want.
3. Select the file you want and click Open.
4. Click OK in the File Open dialog.

The Viewer opens the selected file, or, if appropriate, adds the selected file to the current analysis function.

### Agile Browse to use your Agile Bookmarks to select an attachment file:

1. Click the Agile Browse button in the File Open dialog to display the DMS: File Open dialog.
2. The DMS: File Open dialog displays your Agile Bookmarks in a tree structure.

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Note	If you have not defined any Bookmarks in Agile PLM, the Agile Browse button does not appear in the File Open dialog.
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3. Click + to expand a bookmark and display its item revisions or its file folder versions.
4. Click a revision or version row to highlight the file you want to view.

5. Click OK in the DMS: File Open dialog.

The selected file name appears in the File Name field of the File Open dialog.

6. Click OK in the File Open dialog.

The Viewer opens the selected file, or, if appropriate, adds the selected file to the current analysis function.

**Agile Search to perform a quick search to select an attachment file:**

1. Click the Agile Search button in the File Open dialog to display a Search dialog which allows you to run a quick search.

2. Define your search and click the Search button:

- Class - Select an object class, for example, Items.
- Search Parameter - Enter a text string or a number.

Agile PLM searches the object ID number attribute and the object Name or Description attribute. A Quick search behaves like a Contains search for text strings. The search criteria is treated as a single string and Agile PLM searches for names or descriptions that contain the search parameter string. In the case of ID numbers, Agile PLM searches for an exact match, however, you may use wildcard characters to specify part of an ID number as a search criteria.

- Search Attachment Content - Set this parameter to Yes to search the contents of the attachment files as well.

3. In the Search Results table, click the + next to the object number to expand the list of attachment files for that object.
4. Click a revision row or a version row to select the file you want to view.
5. Click the Load File button.

The selected file name appears in the File Name field of the File Open dialog.

6. Click OK in the File Open dialog.

The Viewer opens the selected file, or, if appropriate, adds the selected file to the current analysis function.





# Modified and Unavailable Viewer Features

**This chapter includes the following:**

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▪ Viewer Modes .....	50

## 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 in the Agile Viewer”.)
- 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 17) and [Guidelines for Marking Up or Redlining Attachments](#) (on page 25).)

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 25) and [Guidelines for Marking Up or Redlining Attachments](#) (on page 25).

## 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.

# Printing

**This chapter includes the following:**

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## Printing Documents from within the Viewer

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

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

For information about how the Agile administrator can customize the Viewer print options, see [Viewer Administration Tasks](#) (on page 55).

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

## Headers/Footers Group in Print Properties

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

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**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.

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Note	For high resolution black and white printing, the transparent watermark is printed on the current document’s contents. For low resolution black and white printing, the watermark is printed on the current document’s contents, but it is not transparent.
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The watermark settings are maintained and modified by your Agile administrator; see the *Administrator Guide*. For more information, see [Viewer Administration Tasks](#) (on page 55).

## Stamps Group In Print Properties

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Note	This feature is not available in this implementation of Agile Viewer.
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## 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 includes the following:**

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▪ Viewing Excel Files.....	57

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**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.

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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.

## 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, KEEPPORIGINALCOLORS, 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.

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

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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.
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### To set the watermark font size:

1. Shut down the JVue server.
2. On the drive where the 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).

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## 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, the number of pages listed in the viewer status bar is the number of Excel worksheet and the Viewer menu command View > Page selects a different Excel worksheet to view.

