Oracle® Fusion Middleware

User's Guide for Oracle Imaging and Process Management

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Oracle Fusion Middleware User's Guide for Oracle Imaging and Process Management, 11*g* Release 1 (11.1.1)

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Preface

Imaging and Process Management (Oracle I/PM) provides a way to easily access, track, and annotate documents across an enterprise. Different types of information can be tracked for different types of documents based on business use. For example, managing invoices and contracts require using different types of information. After a document is uploaded, its metadata can be used to search for and retrieve the document for printing or for viewing through a standard web browser. If you have the proper permissions, you can also add annotations which can be saved to a document for review. Annotations can be secured so that only people with the appropriate permissions are allowed to view specific annotations.

Audience

This guide is intended for users who must upload documents to the Oracle I/PM system or use Oracle I/PM to search, view, annotate, and retrieve documents.

Documentation Accessibility

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

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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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This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/support/contact.html or visit http://www.oracle.com/accessibility/support.html if you are hearing impaired.

I/PM User Interface Keyboard Shortcuts

The shortcuts listed in the following table are available in the Oracle I/PM user interface.

Keyboard Shortcut	Description
Alt + B (Internet Explorer, Safari) Shift + Alt + B (Firefox, Safari)	Focuses on and executes the Back button to move back through a navigation train when creating or modifying Searches, Applications, Inputs, or Connections.
Alt + E (Internet Explorer, Safari) Shift + Alt + E (Firefox, Safari)	Focuses on and executes the Next button to move back through a navigation train when creating or modifying Searches, Applications, Inputs, or Connections.
Ctl + Alt + P	Moves focus to the splitter bars in succession to adjust size of content region. Once focus is achieved, use the arrow keys to move the splitter bar up and down for horizontal bars, and left or right for vertical bars.

The shortcuts listed in the following table are available in the advanced viewer mode when the viewer has focus.

Keyboard Shortcut	Description
M	Exits the applet and changes the focus to the panels or menus at the top of the viewer page.
H	Adds a highlight.
R	Adds a redaction.
L	Adds a line.
S	Adds a sticky note.
T	Opens a new text annotation.
X	Places a stamp annotation.
Tab	Tabs forward through the toolbar and annotations.
Shift + Tab	Tabs backward through the toolbar and annotations.
N	Selects the next annotation.
P	Selects the previous annotation.
Arrows (or number pad arrows)	Moves the selected annotation.
Ctl + Tab	Navigates out of a text entry field when adding either a text annotation or sticky note annotation.
Shift + Arrows (or Shift + number pad arrows)	Sizes the selected annotation.

Keyboard Shortcut	Description
C	Copies the selected annotation.
V	Pastes the copied annotation.
Del	Deletes the selected annotation.
Z	Undoes the last deletion.
W	Rotates the document clockwise.
Q	Rotates the document counterclockwise.
E	Changes the magnification to fit the document's height.
F	Changes the magnification to fit the document's width.
1,2,3,4	Zooms to a quadrant on the document.
G	Opens the GoTo Page dialog box.

Related Documents

For more information, see the following documents:

- *Oracle® Fusion Middleware Administrator's Guide for Imaging and Process Management*
- *Oracle® Fusion Middleware Developer's Guide for Imaging and Process Management*

Conventions

The following text conventions are used in this document:

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

x

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Introduction

This section covers the following topics:

- "About This Guide" on page 1-1
- "About This Product" on page 1-1
- "Logging In" on page 1-3
- "Using Help" on page 1-3

1.1 About This Guide

This guide details how to use Oracle Imaging and Process Management (Oracle I/PM). The information contained in this document is subject to change as the product technology evolves and as hardware, operating systems, and third-party software are created and modified. Due to the technical nature of browsers, databases, web servers, and operating systems, Oracle cannot warrant compatibility with all versions and features of third-party products.

1.2 About This Product

Oracle Imaging and Process Management (Oracle I/PM) is one of the products contained within the Oracle Enterprise Content Management suite that specializes in providing features unique to the storage, classification, and utilization of scanned images of physical documents. Oracle I/PM is particularly well suited for storing the various document artifacts that are core to operation of many common business functions such as invoices, shipping documents, expense receipts, and other related documents.

By allowing you to convert physical documents into an electronic format, Oracle I/PM enables organizations to quickly integrate their content and processes directly with Oracle enterprise applications, such as Oracle E-Business Suite, PeopleSoft Enterprise, and JD Edwards EnterpriseOne. This allows you to proactively and automatically deliver critical invoices, checks, faxes, applications, resumes, expense forms, and reports where and when they are needed. Additionally, users will benefit from having a single source for all transaction-based content, eliminating the need for duplicating work.

The system applies metadata to documents that can be used to find and make them available to relevant users inside and outside the organization. To support business transaction needs, Oracle Imaging and Process Management manages many kinds of physical and electronic documents, including scanned documents, faxes, e-mail, HTML, XML, electronic forms, Microsoft Office documents, and others, all from a single user interface. The end result: document volumes are more predictable since

they are managed in one system instead of being mailed or faxed. Also, security and version control ensure that only the right users can edit or access content, and when used in conjunction with Oracle Universal Records Management, additional control of documents and legal retention policies can be used.

Oracle I/PM takes advantage of Oracle's Business Process Management Suite or Oracle BPEL Process Manager to integrate with process automation throughout the organization. BPEL provides enterprises with an industry standard for business process orchestration and execution. Using BPEL, a system administrator can design a business process that integrates a series of discrete services into an end-to-end process flow. This integration reduces the complexity of the process through improved productivity and decreased costs.

1.2.1 Supported Document Repository

Oracle I/PM leverages Oracle Content Server for storage of documents and metadata. Oracle Content Server is the foundation for a variety of Oracle content management products. It provides a flexible, secure, centralized, web-based repository that manages all phases of the content life cycle: from creation and approval to publishing, searching, expiration, and archival or disposition. Every contributor throughout the organization can easily contribute content from native desktop applications, efficiently manage business content via rich library services, and securely access that content anywhere using a web browser. All content, regardless of content type, is stored in the web repository or database for management, reuse and access. While stored in the repository, all types of content, ranging from e-mail, discussions, documents, reports, spreadsheets and records to images, multimedia or other digital formats, receive the same set of fundamental core services.

For more information about the integration of Oracle I/PM and Oracle Content Server, see *Oracle Fusion Middleware Administrator's Guide for Imaging and Process Management*.

1.2.2 Supported Databases

Oracle I/PM supports the following databases:

- Oracle
- SQL Server
- DB2

For more information about these databases and the storage mechanisms available for document content, see the *Oracle Fusion Middleware Administrator's Guide for Imaging and Process Management*.

1.2.3 Key Features and Benefits

Oracle I/PM improves your business with the following key features and benefits.

Key Features
- Apply metadata, security, and version control to documents
- Annotate and mark up documents
- Automate routing and approvals
- Allow easy and secure searching across different document types
- Apply record and retention management capabilities

- Integrates with leading document scanning and capture solutions

- Can work within a clustered environment to facilitate load balancing

- Certified integrations with ERP and LOB applications

- Supports high-volume applications for billions of items

Key Benefits

- Decreases business transaction cycle times for back-office operations

- Eliminates duplicate data entry

- Allows internal customers to check transaction status on their own

- Eliminates process bottlenecks

- Minimizes document error and loss

- Eliminates mailed and faxed documents

- Reduces physical storage space costs

- Finds and retrieves documents directly from ERP, CRM, and HR management systems

- Enhances customer and vendor satisfaction

1.3 Logging In

Oracle I/PM provides secure access to documents based on user and group rights. Like most systems, security starts with entering a user name and password for the system. As a web-based application, you access Oracle I/PM through a web browser by accessing the I/PM log in page. Once there, enter your user name and password to access Oracle I/PM. If you do not know your user name and password, or how to access the log in page, contact your system administrator.

1.4 Using Help

In addition to the *Oracle Fusion Middleware User's Guide for Oracle Imaging and Process Management*, you can access help about Oracle I/PM product functionality by using online help, context-sensitive tooltips, and keyboard shortcuts. The following subsections discuss these methods:

- Online Help

- Tooltips

1.4.1 Online Help

Click **Help** in the Oracle I/PM information bar displayed at the top of each page to view general information about the page currently displayed. If you are in a special window or section of a page, click **Help** to display context-sensitive help information.

1.4.2 Tooltips

When you hover the mouse cursor over a field label or icon in your web browser, context-sensitive information appears.

Figure 1–1   Download Icon Tooltip
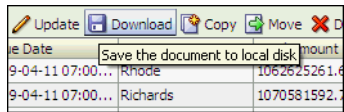
If a field requires a special format, such as a date, click the field to display a tooltip showing an example.

Figure 1–2   Date Format Tooltip

2
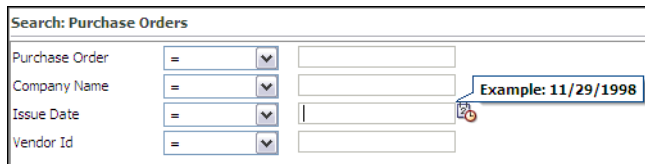
Understanding Applications and Metadata

This section explains what an application is and provides an overview of how metadata is defined and subsequently associated with documents managed by Oracle I/PM. It contains the following topics:

- "Understanding Applications" on page 2-1
- "Understanding Metadata" on page 2-1
- "Associating Metadata with Documents" on page 2-2
- "Searching Document Metadata" on page 2-3

2.1 Understanding Applications

Applications are the core of Oracle I/PM. Consider an application as a type of management container for documents. You select an application to use when uploading documents to Oracle I/PM and that application determines what information, or metadata, is associated with the uploaded document. The associated metadata may be visible to you and require you to input information into a form, such as entering an invoice number for the document, or the metadata may be invisible to you and used by the Oracle I/PM system, such as the security permissions required to retrieve the document. Each application has a different set of metadata, called a definition, which is determined by the person creating the application. An application definition is used to:

- Assign permissions: applications determine what security permissions are appropriate to access uploaded documents.
- Define indexing options: applications determine what information associated with a document is indexed and made available for searching.
- Set storage policy: applications determine how a document is handled in a repository and when it is archived.
- Define storage location and rules: applications determine the physical location of a document.
- Specify workflow processes to initiate as part of the document workflow: applications are used to manage interaction with other business systems to integrate documents with standard business processes.

2.2 Understanding Metadata

Metadata is the set of information associated with a document at the time the document is uploaded to Oracle I/PM and is specified by the application used to

upload the document. Metadata is different for each type of document because each type of document is uploaded using a different application. The metadata defined in each application is different because it is determined by the business need and agreed upon by the people responsible for the business process. Metadata can be visible to you, such as the information you enter when uploading or searching for a document, or it may be invisible to you and used by the Oracle I/PM system, such as security settings allowing access to the document, or a workflow that must be initiated when the document is uploaded.

2.2.1 Visible Metadata

Metadata can include invoice numbers, dates, company names, and any other information required by a business process. For example, invoice numbers may be tracked for invoices, but not for vendor contracts, job applications, or loan applications. The person creating the application determines the metadata fields used throughout the Oracle I/PM interface. This visible metadata is displayed on forms used when uploading documents, or on search forms used for retrieving documents. For example, the Accounting and Shipping departments for Corporate Car Rental may agree that lease metadata should include the following information which will allow both departments to access the required information to complete their jobs:

- Lease number
- Car Delivery Date
- Lease Expiration Date
- Amount Due

You would fill in values for these fields on a form used to upload lease documents, and the metadata can be indexed and used to search for and retrieve documents from the repository.

2.2.2 System Metadata

An application definition also includes information that you cannot see when uploading or searching for a document, but is necessary for the document to move through a business process. Such metadata includes permissions to retrieve and view a document, information regarding the document storage and archiving, and whether or not the document must go through a workflow. This metadata is not something you control, but is defined in the application by the person creating the application based on the needs of the business process for which the application is being used.

2.3 Associating Metadata with Documents

Each time a document is uploaded to Oracle I/PM, it is put into an application that has been designed for that type of document. If uploaded through a scanning station or other automated process, the metadata values are specified and populated during the upload process. If you are uploading the document manually, you choose the application to use and the application displays a form listing the metadata for which you can specify values. The values you specify in the form are the values for the metadata associated with the document as it is uploaded. Whether the metadata values are specified automatically during an automated upload or by you when you upload the document manually, the values are indexed and can then be used to search for and retrieve documents.

For example, when uploading an invoice, you might select an application named *Invoices*, which displays a form that includes a field for *Invoice Number*. When you

enter the invoice number into the field and upload the document, that value gets indexed. To retrieve the document, you can select *Invoices* under your *Searches* panel and enter the value into the *Invoice Number* field in the search form. Because the value was indexed when the document was uploaded, Oracle I/PM finds it and displays it in the viewer.

2.4 Searching Document Metadata

The metadata associated with documents when they are uploaded can be used as criteria to search for and retrieve documents from Oracle I/PM. All fields are searchable, but not all fields may be made available to you on a search form.

The person creating a search creates it in a way similar to creating an application. The person creating the search determines what metadata fields you see in a search form. Each search is displayed in the Searches panel of the Navigator pane. Clicking a search link displays a form requesting search parameter metadata associated with the type of documents you are searching for. Because an application determines the metadata to be used as search criteria, most search options in Oracle I/PM have a direct correlation with the application in which a document resides. For example, if there is an application named "Leases" for uploading leases, then there is likely a search named "Current Leases" that displays a search form to enter criteria to find lease documents within a certain date range. However if necessary, a single search form can be created to be used to search across multiple applications.

Depending on how Oracle I/PM is configured, document content (full text) may also be made available for searching. For example, text from a leasing contract may get indexed when the lease is uploaded to Oracle I/PM, enabling you to search for words or phrases from within the lease. Like metadata, searches for the full text of documents is done using a field on the search form when the search is created. If you are uncertain whether your version of Oracle I/PM supports full text searching, ask your system administrator.

3

Uploading Content

The upload process, also called ingestion, involves creating an electronic image of your document, using a predefined application in Oracle I/PM to associate metadata to the document, and manually assigning values to required metadata by completing fields on the Oracle I/PM document upload page.

This section covers the following topics:

3.1 Creating An Electronic Image

Before you can upload a document, it must be in an electronic format such as a TIFF or JPEG image, a PDF file, or a Microsoft Word business document. If your document is not in an electronic format, scan the document to create and capture an electronic image. You can use a desktop scanner or your company may have individuals or a department responsible for scanning all paper documentation.

After it has been scanned and before you can upload, you will need to know where the electronic copy of the document is. If you scanned the document yourself, you likely saved it to your local file system or to a networked file system to which you have access. If the document was scanned by someone else, talk to them to see if it was saved or could be moved to a networked file system to which you have access. You must be able to navigate to the electronic file from within the Oracle I/PM interface in order to upload the file.

3.1.1 Document Capture Options

Oracle offers two solutions for streamlining the capture process for paper and electronic documents:

- Oracle Document Capture

- Oracle Distributed Document Capture

Oracle Document Capture supports high volume production scanning from a central location while Oracle Distributed Document Capture provides a web interface that allows distributed enterprises to easily capture images from remote locations. Both solutions offer industry-standard images from document scanners, automated indexing options, flexible implementation methods, and are efficient ways to scan paper-based content into document images for use in Oracle I/PM. Both products are fully integrated with Oracle Imaging and Process Management and Oracle Content

Server to provide you with one system to capture, manage, store and electronically retrieve your mission critical business content. For more information about Oracle Document Capture and Oracle Distributed Document Capture, see the Oracle Document Capture web site.

3.2 Uploading a Document to Oracle I/PM

Once a document is captured and an electronic version available on a file system to which you have access, you can upload the document. You must have the rights to create a document in at least one application in order to upload a document. To upload a document, do the following:

1. Click **Tools** in the Navigation pane to expand it, then click **Upload Document**. The Upload Document Page is displayed. Note that if you do not have rights to create a document in at least one application, the Upload Document option is not displayed.

2. From the **Select an Application** field, choose the correct application for the type of document you are uploading. The correct application is determined by the business process in which the document type is used.

   Additional metadata fields are displayed on the Upload Document page when an application is selected. The additional fields are unique to each application and are defined by the person creating the application. The fields are determined by the type of document being uploaded and its associated business process. Required fields are noted with an asterisk (*). For more information about metadata fields, see "Understanding Metadata" on page 2-1.

3. Click **Browse** to locate the document image you want to upload. A standard dialog box opens for you to locate the document.

   > **Note:** If using your keyboard rather than your mouse to select the Browse button, use the **Space** bar to execute the Browse button function and open the dialog box. The Enter key does not execute the Browse button function.

4. Navigate to the document and click **Open**. The dialog box closes and the path to the document is shown in the Document Image field

5. Click **Upload**. A confirmation message displays after a successful upload.

   > **Note:** Oracle I/PM has been optimized to store files of sizes 200KB or smaller, but upload times can be affected by your document size as well as the speed of your network connection. If the documents you need to upload are larger than 200KB, contact your system administrator.

3.2.1 Previewing and Annotating When Uploading a Document

You can view and annotate an electronic document prior to uploading it by using the Viewer, provided you have the rights to do so. This can allow you to speed a process along, for example by stamping an invoice *Approved* with the Stamp Annotation prior to uploading the invoice. For detailed information on using the Viewer, see Chapter 5, "Viewing, Annotating, and Retrieving Documents".

To upload a document using the Viewer, do the following:

1. Click **Tools** in the Navigation pane to expand it, then click **Upload Document**. The Upload Document Page is displayed.

2. From the **Select an Application** field, choose the correct application for the type of document you are uploading. The correct application is determined by the business process in which the document type is used.

   Additional metadata fields are displayed on the Upload Document page when an application is selected. The additional fields are unique to each application and are defined by the person who created the application. The fields are determined by the type of document being uploaded and its associated business process. Required fields are noted with an asterisk (*). For more information about metadata fields, see "Understanding Metadata" on page 2-1.

3. Click **Open Viewer**. The viewer is opened in the advanced viewer mode.

4. Click the **Open a local file** icon in the Advanced Viewer Toolbar Options section of the Viewer Toolbar. A dialog box opens for you to locate the document.

5. Navigate to the document and click **Select the file to open**. The dialog box closes and the document is displayed in the viewer.

6. Add desired annotations and save them by clicking the Save icon in the Viewer Toolbar, then click **Upload**. A confirmation message displays after a successful upload. For detailed information on annotating a document, see "Creating Annotations" on page 5-7.

3.3 Updating Existing Content in Oracle I/PM

If you have a reason to change a document or update its metadata, you can do so provided that you have the proper permissions.

To update the document and document metadata, do the following:

1. Search for the document you want to update. For detailed information on how to search, see "Executing a Search" on page 4-2.

2. Click the row in the search results with the document you want to update to select it, and click **Update** in the Search Results Toolbar, or right-click on a document and select **Update** from the Search Results Contextual Menu. The Update Document Page window opens.

3. If you want to update the document, click **Browse** to locate the new document to upload. A standard dialog box opens for you to locate the document.

   > **Note:** If using your keyboard rather than your mouse to select the Browse button, use the Space bar to execute the Browse button function and open the dialog box. The Enter key does not execute the Browse button function.

   a. Navigate to the new document and click **Open**. The dialog box closes and the path to the document is displayed in the Document Image field. The new document creates a new revision of the original.

4. Update the information in the desired metadata fields.

5. Optionally, enable **Lock Document** or **Keep Lock**, depending on whether or not you have previously locked the document. It is recommended that you lock the document before updating it. Locking a document does not prevent others from viewing it, but ensures that no one else can update the document while you have

it locked. Once locked, a document can be unlocked either by the person that locked it, or someone with Lock Admin rights.

6. Click **Update**. A confirmation is displayed at the bottom of the Update Document page.

> **Note:** In some cases when updating a document you may receive an error stating that you are unable to lock the document. This is due to a permission error in the repository that stores the document and metadata and is not related to the Lock Document option. Contact your system administrator if you have questions about any error you receive if unable to update a document.

7. Close the Update Document Page.

3.3.1 Updating a Document From the Properties Panel

You can also update a document from the Properties Panel of the Viewer by doing the following:

1. With the document displayed in the Viewer, click **Update** in the Properties Panel. The metadata fields in the panel are enabled.

2. If you want to update the document, click **Browse** to locate the new document to upload. A standard dialog box opens for you to locate the document.

> **Note:** If using your keyboard rather than your mouse to select the Browse button, use the **Space** bar to execute the Browse button function and open the dialog box. The Enter key does not execute the Browse button function.

   a. Navigate to the new document and click **Open**. The dialog box closes and the path to the document is displayed in the Document Image field. The new document creates a new revision of the original.

3. Update the information in the desired metadata fields.

4. Optionally, enable **Lock Document** or **Keep Lock**, depending on whether or not you have previously locked the document. It is recommended that you lock the document before updating it. Locking a document does not prevent others from viewing it, but ensures that no one else can update the document while you have it locked. Once locked, a document can be unlocked either by the person that locked it, or someone with Lock Admin rights.

5. Click **Update**. A confirmation is displayed at the bottom of the Properties Panel.

4

Searching for Content

The application into which a document is uploaded contains metadata fields whose values can be indexed and used to find the document within Oracle I/PM. If a document contains textual information, that can be searched for as well, provided full text indexing is enabled on the Content Server repository and is enabled in the application used to upload the document.

To search for documents in Oracle I/PM, you use a predefined search set up by a user with Search Create permissions. Predefined searches are listed in the Searches panel of the navigator pane. Only searches to which you have view rights are displayed.

Clicking a predefined search in the Searches panel displays a tab in the page region with a search form where you can enter the criteria on which you want to search. For example, a search titled Invoices may allow you to enter an invoice number into the search form and return the invoice you need. The results of the search are listed underneath the original search form in the tab on the page region. Only documents to which you have security access are returned, ensuring that people only have access to what they have rights to see.

A new tab and search form is displayed each time you click on a predefined search in the Searches panel. Clicking a tab brings it to the front of the page region, allowing you to access and compare search results from multiple searches. For example, one tab can be used to search for purchase orders while another tab can be used to search for outstanding invoices. Individual tabs can be closed manually by selecting the search tab and clicking the *x* located on the tab. Right-clicking anywhere on a tab allows additional options of closing all search tabs or closing all but the currently selected search tab.

Searches can be defined to search across multiple applications. For example, a search may be set up that would allow you to search for a purchase order number across three applications: purchase orders, shipping receipts, and invoices. The results would list a purchase order you can view to make sure you ordered a particular item, a shipping receipt to verify the item was received, and an invoice that you can then authorize for payment.

> **Note:** Only users with create permissions can create a search. If you require a specific search to be defined, talk to the person who manages searching in Oracle I/PM.

This section contains the following topics:

4.1 Executing a Search

Searches to which you have View rights are listed in the navigator pane in the Searches panel. Clicking a search in the Searches panel opens a tab in the page region and displays a search form. An example of a typical search form is displayed in the section "Search Pages" on page A-6.

In some cases there may be a search defined where the search criteria is predetermined and does not require you to enter any search values. In that case, no search form would be necessary. For example, when searching for invoices from the last 5 days.

To execute a search, do the following:

1. Click **Searches** to open the panel in the navigator pane. All searches available to you are displayed.

2. Click the search that corresponds to the type of document you want to locate. For example, if you are looking for an invoice that has not been paid, there may be a search titled "Outstanding Invoices."

3. Enter the criteria you want to search for in the appropriate field on the search form if necessary. For example, when searching for an invoice there is likely an option to enter the invoice number. Required fields are noted with an asterisk (*). If the person creating the search provided additional instructions on how best to use the search, an Instruction area is displayed above the search area. Instructions are displayed by clicking the icon next to the instruction area title to expand the area. Depending on the display skin chosen on the preferences page, the icon could be a plus sign, an arrow, or some other indicator.

   If you leave a field blank, the search is executed without that condition, and the part of the search that uses the parameter will be omitted. If the blank field is a required field, an error message is displayed.

   > **Note:** Available fields are unique to each search and are determined by the person who created the search. The fields available to a person creating a search are determined by the applications that are included in the search. If you need a new search to be defined or available search criteria modified, contact the person who manages Oracle I/PM.

4. Optionally, select a search operator. In some cases a search may have multiple operators available for you to select against a specific field. This gives you greater flexibility on how you would like the search to be performed. For instance, a field may default to the *Equal to* (=) operator so that you can look for a specific value but also have the *Greater than* (>) and the *Less than* (<) operators available so that you can look for a range of values if needed. For additional information on search operators, see "Picklist Data Field Input Operators" on page A-7.

5. Click **Search** to return the results based off the criteria you specified. Search results are displayed in a table beneath the search form in the search tab. Note that once you have executed a search, clicking the Refresh link in the main banner refreshes the information on the page but does not execute the search again. If you or another user updates document metadata, the new metadata is not displayed in the search results table until you run the search again by clicking **Search**.

   An example of a typical search result is displayed in the section "Search Form Criteria and Search Results Table" on page A-8.

> **Note:** Broad search criteria can return many results, which may make it difficult to find the document you are looking for. You can refine your search by using additional search criteria to narrow and reduce the number of results returned. If you are unable to narrow the search down enough to find the document you are looking for then see the person who manages Oracle I/PM for help in refining the existing search or defining a new search.

4.2 Working with Search Results

You can modify how search results are displayed to suit your needs and perform actions on individual or multiple documents returned in a search. This section has the following topics:

- "Manipulating Search Results" on page 4-3
- "Manipulating Documents In a Search Results Table" on page 4-5

> **Note:** In some circumstances, a -1 may be listed in a number field on a search results table. This happens when an application containing documents is modified to have a number field. The new field displays a -1 on documents that were in Oracle Content Server prior to when the new field was added. When a new document is uploaded after the field is added and the number field is left blank, search results will display 0 for the number field value.

4.2.1 Manipulating Search Results

You can modify how search results are displayed to suit your needs and e-mail searches you have executed to others. Use the View menu on the Search Results Toolbar to show, hide, or reorder columns, and to detach the results and display them as a separate page. You can also reorder columns by clicking on them and dragging them to the position you want.

Sort on different columns by clicking the column title. Text fields are sorted alphabetically, number and date fields are sorted numerically. To view an example of a search results table, see "Search Form Criteria and Search Results Table" on page A-8.

This section has the following topics:

- Resizing Columns
- Showing or Hiding Columns
- Reordering Columns
- Detaching Search Results
- Sending Search Results by E-Mail

4.2.1.1 Resizing Columns

To resize columns, do the following:

1. In the search results table of a search tab, position your cursor between the titles of the columns you want to resize. The cursor arrow changes to display two arrows facing in opposite directions.

2. Click the divider line between the two field headings and drag to resize the columns.

4.2.1.2 Showing or Hiding Columns

Columns displayed in a search results table are dependent on the metadata fields assigned to the search when it was created. Each of the columns have fields from one or more of the applications searched. The Lock Document and MIME Type columns are included on each search result, but the remaining columns change. In some cases the number of columns displayed may be extensive and make it difficult to quickly access the information you want. To help, you can hide unwanted columns.

To hide columns in the search results table, do the following:

1. Select **View** then **Columns**. A listing of all available columns is displayed. Enabled columns have a check beside the name. By default, all are enabled.

2. Click the name of the enabled column you want to hide in the listing to disable it. The page refreshes and the column is hidden.

To unhide columns, repeat the steps but select the disabled column you want displayed. The column is enabled and the page refreshes to display the column. Alternately, you can select **View** then **Columns** then **Show All** to view all available columns in the table.

4.2.1.3 Reordering Columns

You can change the order of columns in a results table to make it easier to compare information in one of two ways. One way is by clicking the column header and dragging the column to the preferred location in the search results table. Alternately, to change column order, do the following:

1. In the search results table of a search tab, select **View** then **Reorder Columns**. The Reorder Columns Page is displayed.

2. Select the column or columns you would like to move and click the up or down arrow to reposition the column in the display order. Multiple columns can be selected and moved at the same time.

3. Click **OK**. The Reorder Columns Page closes and the page refreshes to display the search results table with the columns in the new order.

4.2.1.4 Detaching Search Results

Search results tables can be extensive depending on the number of documents returned, how much metadata is associated with the documents, and how many of the metadata fields are set to display in the predefined search. In addition to hiding and reordering columns to make viewing your results easier, you can also detach the results table from the search tab. This gives you more display room to see all of the results.

To detach the search results table from the search tab, do the following:

1. In the search results tool bar, click **Detach**. A new page opens displaying only the search results table.

2. To close the separate search results table page, click the *X* in the corner of the page, or click **Detach** in the search results table page. The search results table page closes.

> **Note:** The size of the new search results table page is determined by the original size of your browser page. Also, the new page is constrained by the original browser page. It cannot be moved outside of the original browser page. If you make the original browser page smaller after detaching the search results table, the results table page is masked by the original page border and you may not be able to see some of the results or close the results table page until you scroll using the browser scroll bars or make your original browser page larger than the results table page.

4.2.1.5 Sending Search Results by E-Mail

In some cases you may need to share the results of a search with a coworker. This may be to ask for their input on a problem or to have them monitor a process. You can e-mail a link to run a search using criteria you have specified without having them enter the criteria themselves, provided they have view rights to the search.

To send an e-mail containing a link to run a search you have made, do the following:

1. In the search results tool bar, click **Email**. An e-mail from your default e-mail client is displayed that contains a link to the results of your search.

2. Enter the e-mail address of the person to whom you want to send the results and send the e-mail.

> **Note:** To view the search results using the link in the e-mail, the recipient must have the necessary permissions to log into I/PM and have view access to the search.

4.2.2 Manipulating Documents In a Search Results Table

You can perform actions on individual or multiple documents in a search result by clicking a document to select it and then clicking the action you want to take on the Search Results Toolbar. Available actions on the toolbar are dependent on if you have a single document or multiple documents selected in the search results list. To select multiple documents listed consecutively, hold the shift key down while selecting the first and last document in the range. If you want to select multiple documents that are not consecutive, hold the Control (Ctl) key down while clicking each document in the list you want to select. The actions available in the Search Results Toolbar are also available by right-clicking on a document in the search result to display the Search Results Contextual Menu. Like the toolbar, available actions in the contextual menu are dependent on if you have selected one or multiple documents.

This section has the following topics:

- Opening a Document in the Viewer
- Locking and Unlocking a Document
- Updating a Document
- Downloading a Document
- Copying a Document
- Moving a Document
- Deleting a Document

4.2.2.1 Opening a Document in the Viewer

Documents are viewed using either the basic or the advanced viewer mode, depending on the preference set for Default Viewer Mode on the Preferences Page. If you regularly need to make or edit annotations, ensure the preference setting is set to use the advanced viewer mode. You can also switch between modes if necessary from within the viewer.

Note that multiple documents can be opened in the viewer to facilitate comparing documents. If multiple documents are opened, they are each displayed on their own tab. Each tab can be closed individually using the Close Current icon to the right of the open tabs, or options to close all tabs or all but the active tab can be selected from the Close menu next to the icon.

Multiple documents can be opened one at a time, or all at the same time by selecting multiple documents from a search results table before opening. Multiple documents can be selected using **Shift+click** for documents listed sequentially in a search results table, or **Ctl+click** documents not in sequence in a results table. Detailed information about the two viewers and their options is found in Chapter 5, "Viewing, Annotating, and Retrieving Documents".

To open a document in the viewer, do the following:

1. From a search results table, click the document icon in the MIME Type column next to the item you want to open. A separate page opens to display the document in the viewer.

Alternately, you can use **Open** from either the Search Results Toolbar or the Search Results Contextual Menu. To open a document in the viewer using the toolbar, do the following:

1. From a search results table, select the document or documents you want to open in the viewer.

2. Click **Open** in the toolbar. A separate page opens to display the document or documents in the viewer.

To open a document in the viewer using the contextual menu, do the following:

1. From a search results table, right-click on the document or documents you want to open in the viewer. A contextual menu is displayed with the options also available from the toolbar.

2. Select **Open** from the contextual menu options. A separate page opens to display the document or documents in the viewer.

4.2.2.1.1 Switching from Basic to Advanced Viewer Mode If your default is set to open a document in the basic viewer mode but you need to add or edit an annotation and have rights to do so, you can switch to the advanced mode by doing these steps:

1. With the document open in the basic viewer, select **View** then **Use Advanced Viewer**. The viewer changes to the advanced mode and the Advanced Viewer Toolbar Options are enabled.

4.2.2.2 Locking and Unlocking a Document

To keep other users from modifying a document's metadata or adding or editing a document's annotations, you can lock it. Once locked, only the person who locked it can update the metadata or add annotations. This is recommended to prevent two people from updating a document at the same time, causing a conflict. Once locked, only the person who locked the document or someone with Lock Admin document security can unlock it.

To lock a document, do the following:

1. In the search results table, select the document you want to lock and click **Lock** in the toolbar, or right-click on the document and select **Lock** from the contextual menu. An icon is displayed in the Locked column of the search results and the document or its metadata can no longer be modified until someone with the proper security unlocks it.

To unlock a document, do the following:

1. In the search results tool bar, select the document you want to unlock and click **Unlock** in the toolbar, or right-click on the document and select **Unlock** from the contextual menu. The icon is no longer displayed in the Locked column of the search results and the document or its metadata can now be modified.

> **Note:** Anyone granted Lock Admin document security in an application can unlock any document within that application.

4.2.2.3 Updating a Document

If a document or document metadata needs to be updated, you can do so from a search results table. For information on updating a document, see "Updating Existing Content in Oracle I/PM" on page 3-3.

4.2.2.4 Downloading a Document

You can download a document from a Search Form Criteria and Search Results Table using either the Search Results Toolbar or the Search Results Contextual Menu. To download a copy of the document in its original format without annotations, you must have the proper permissions to modify the annotations, or the download will be denied. You can also download a TIFF image of the document with annotations. For information on how to download a document, see "Downloading Documents" on page 5-12.

4.2.2.5 Copying a Document

You can copy an existing document, its metadata, and annotations into the same or a different application. You must have security rights to create a document in the application you select.

To copy a document, do the following:

1. From a search results table, select the document you want to copy.

2. Click **Copy** in the toolbar or right-click on the document and select **Copy** from the contextual menu. The Copy Document Page is displayed.

3. Select the application to use when copying the document. You must have security rights to create a document in the application you select. The metadata fields pertinent to the selected application are displayed. If the document is being copied to the same application, the metadata fields are populated with the values from the document you are copying. If the document is being copied to a different application, shared metadata fields are populated with the previous values and unique metadata fields are blank.

4. Enable the **Copy existing annotations** check box if you want annotations to be copied along with the file. When enabling this check box, Oracle I/PM attempts to copy the native file with the existing annotations as is. If you do not have security rights to modify an annotation being copied, Oracle I/PM permanently burns the

annotation into a TIFF version of the original document. If the original document is not in a TIFF format, Oracle I/PM converts the native document to TIFF.

5. Modify or enter the necessary metadata values for the new document and click **Copy**. A message is displayed at the bottom of the page confirming the document was copied successfully.

6. Close the Copy Document Page.

4.2.2.6 Moving a Document

You can move an existing document and its metadata from one application to another.

Note: To move a document between applications, you must have security rights to delete a document from the source application and security rights to create a document in the destination application. If the document is annotated, the user must have the same annotation security rights in both applications.

To move a document, do the following:

1. From a search results table, select the document you want to move.

2. Click **Move** in the toolbar or right-click on the document and select **Move** from the contextual menu. The Move Document Page is displayed.

3. Select the application to use when moving the document. The metadata fields pertinent to the selected application are displayed. Metadata fields shared between the initial application and the one the document is being moved to are populated with the previous values. Metadata fields unique to the application the document is being moved to are blank. You cannot move a document to the same application.

4. Modify or enter the necessary metadata values for the new document and click **Move**. A message is displayed at the bottom of the page confirming the document was moved successfully.

5. Close the Move Document Page.

4.2.2.7 Deleting a Document

If for any reason you no longer need a document, for example if a document has been uploaded twice by mistake, you can delete it provided you have the document security rights to delete a document from an application. Once deleted, a document cannot be recovered.

To delete a document, you can use **Delete** from either the Search Results Toolbar or the Search Results Contextual Menu. To delete a document using the toolbar, do the following:

1. From a search results table, select the document you want to delete.

2. Click **Delete** in the toolbar. A separate page opens asking you to confirm that you want to delete the document.

3. Click **Yes** and close the confirmation page. The document remains displayed in the search results table until the search is executed again.

To delete a document using the contextual menu, do the following:

1. From a search results table, right-click on the document you want to delete.

2. Select **Delete** in the contextual menu. A separate page opens asking you to confirm that you want to delete the document.

3. Click **Yes** and close the confirmation page. The document remains displayed in the search results table until the search is executed again.

5

Viewing, Annotating, and Retrieving Documents

Documents stored in Oracle I/PM are viewed using a document viewer. The document viewer displays a document in a separate window. In addition to the document, the viewer displays any annotations you have rights to view, as well as document properties and history. Document properties are a list all of the metadata associated with a document. Document history is a list of all actions that have occurred to a document while in Oracle I/PM.

The document viewer has two modes: basic and advanced. Both modes display the document, annotations, history and properties. The advanced mode also enables you to add or edit document annotations, provided you have the security rights to do so. In order to use the advanced viewer mode and add or edit annotations, Java version 1.6 must be installed on your computer and your browser must allow Java applets to run. Java is a free technology that expands the ability of your computer. If you do not have Java set to run the first time you use the viewer in advanced mode, you will be asked to install and approve the Java plug-in. You can do so by following the instructions presented by your web browser. If you are uncertain if you have Java installed and working on your computer, or if you need the advanced viewer mode and are unable to get it working, contact your system administrator.

The default viewer mode for opening documents is set on the Preferences Page and is initially defined when Oracle I/PM is installed. If you regularly need to make or edit annotations, ensure that the preference setting is set to use advanced viewer mode. You can also switch between modes easily from within the viewer if necessary.

> **Note:** Larger and more complex documents require larger amounts of memory to be available to the viewer. If using the viewer in advanced mode, it is recommended that you have a minimum of 768 megabytes of memory available. If you are uncertain if you have enough memory on your system, or are having difficulty viewing documents, contact your system administrator.

This section details the steps necessary to view and annotate documents. It contains the following topics:

- "Viewing Documents" on page 5-2
- "Retrieving Documents" on page 5-12
- "Viewing Document Information" on page 5-4
- "Working With Annotations" on page 5-6

5.1 Viewing Documents

Documents can be opened in the viewer from a Search Form Criteria and Search Results Table. To open a document in the viewer from a search results table, do the following:

1. From a search results table, click the document icon in the MIME Type column next to the item you want to open. A separate page opens to display the document in the viewer.

Alternately, you can use **Open** from either the Search Results Toolbar or the Search Results Contextual Menu. To open a document in the viewer using the toolbar, do the following:

1. From a search results table, select the document you want to open in the viewer.

2. Click **Open** in the toolbar. A separate page opens to display the document in the viewer.

To open a document in the viewer using the contextual menu, do the following:

1. From a search results table, right-click on the document you want to open in the viewer. A contextual menu is displayed with the options also available from the toolbar.

2. Select **Open** from the contextual menu options. A separate page opens to display the document in the viewer.

5.1.1 Switching Between Basic and Advanced Viewer Mode

You can easily switch between viewer modes from within the viewer. For example, if your default is set to open a document in basic viewer mode but you need to add or edit an annotation and have rights to do so, you would want to switch to the advanced mode. Or, if you are in the advanced viewer mode and you want to see how annotations will display for someone using the basic viewer mode, you would switch to the basic viewer mode.

To switch between viewer modes from within the viewer, do the following:

1. If in the Basic viewer mode, select **View** then **Use Advanced Viewer**. The document is displayed in the advanced mode and the Advanced Viewer Toolbar Options are enabled. If in the Advanced viewer mode, select **View** then **Use Basic Viewer**. The document is displayed in the basic mode and the Advanced Viewer Toolbar Options are disabled.

5.1.2 Rotating Documents

If a document has been uploaded in an incorrect orientation, or if you otherwise need to rotate the document orientation in the viewer, you can rotate a document by 90 degree increments either clockwise or counterclockwise.

If you rotate a document in the basic viewer mode, it does not stay rotated after you close it. The next time you open the document in either the basic or advanced viewer modes, you would need to rotate it again. Rotating a document in the advanced viewer mode maintains the new orientation provided that:

- you have at least Annotate Standard security rights to the document

- you save the changes to the document after rotating it.

Once rotated in the advanced viewer mode and the changes are saved, the document stays in the new orientation for you and all other users in both the basic and advanced viewer modes.

To rotate a document in the viewer, do the following:

1. With the document displayed in the viewer, click the **Rotate Counter Clockwise** icon or **Rotate Clockwise** icon on the Viewer Toolbar. The document is rotated 90 degrees in the requested direction.

5.1.3 Zooming Document Views

You can increase or decrease the size at which a document is displayed in several ways. The original size or resolution of the document in I/PM is not changed. Only the size at which the document is displayed is changed.

This section has the following topics:

- Zooming Incrementally
- Fitting Document View to Viewer Size
- Zooming Selection to Viewer Size

5.1.3.1 Zooming Incrementally

To incrementally change the displayed size of a document, do the following:

1. With the document displayed in the viewer, click the **Zoom In** icon on the Viewer Toolbar to increase the size, or click the **Zoom Out** icon to decrease the size. When the document is zoomed to the maximum or minimum size, the Zoom icon is disabled.

5.1.3.2 Fitting Document View to Viewer Size

You can quickly zoom a document to maximize the full width of the document, the full height of the document, or the full page of the document in the viewer.

To maximize the full width of a document, do the following:

1. With the document displayed in the viewer, click the **Fit Width** icon on the Viewer Toolbar. The document changes to the largest size possible while still seeing the full width of the document. Note that if the document is oriented so that it is taller than it is wide, the bottom part of the document is initially off of the page. You can scroll down the document to see the bottom part of the page.

To maximize the full height of a document, do the following:

1. With the document displayed in the viewer, click the **Fit Height** icon on the Viewer Toolbar. The document changes to the largest size possible while still seeing the full height of the document. Note that if the document is oriented so that it is wider than it is tall, one side of the document is off of the page. You can scroll the document to see the part off the page.

To maximize the document so that all of it is visible, do the following:

1. With the document displayed in the viewer, click the **Best Fit** icon on the Viewer Toolbar. The document changes to the largest size possible while still seeing both the full height and full width of the document.

5.1.3.3 Zooming Selection to Viewer Size

To quickly fill the viewer area with a small section of a document without having to zoom incrementally, do the following:

1. With the document displayed in the viewer, click the **Start Rubberband Zoom Mode** icon on Viewer Toolbar.

2. Click and drag the cursor over the area of the document you want to enlarge. A marquee is drawn to help with the selection. When a document has reached its maximum size, it will no longer be enlarged. Attempts to zoom further using the rubberband zoom will stay at the maximum size, but center the display on the selected area.

3. Release the mouse button to snap the selected area to the size of the viewer.

5.1.4 Navigating Multi-Page Documents

When viewing a multi-page document, you can navigate the document incrementally a page at a time, skip to the first or last page of a document, or select the page number of the document you want to view.

To navigate a document incrementally page by page, do the following:

1. With the document displayed in the viewer, click the **Go Forward One Page** icon on the Viewer Toolbar. The next page of the document is displayed.

2. With the document displayed in the viewer, click the **Go Back One Page** icon on the Viewer Toolbar. The previous page of the document is displayed.

To quickly navigate to the first and last page of a document, do the following:

1. With the document displayed in the viewer, click the **Go To Last Page** icon on the Viewer Toolbar. The last page of the document is displayed.

2. With the document displayed in the viewer, click the **Go To First Page** icon on the Viewer Toolbar. The first page of the document is displayed.

To quickly navigate to a specific page of a document, do the following:

1. With the document displayed in the viewer, select **Go to page** from the **Go To Page Number** menu on the Viewer Toolbar. A dialog box is displayed where you enter the number of page you want displayed.

2. Enter the page number you want displayed. The selected page of the document is displayed. If the page entered is not valid, an error is displayed.

Alternately, you may select a page number directly from the **Go To Page Number** menu on the Viewer Toolbar. Ten pages before and after the currently displayed page are available for selection.

5.2 Viewing Document Information

When a document is uploaded, the application used to upload it associates metadata with the document. You enter metadata manually into a form when you upload a single document. A system administrator specifies it automatically when uploading a large number of documents. When a document is viewed, the Properties Panel in the viewer lists all the metadata associated with it. Similarly, each action performed on a document in Oracle I/PM is tracked and displayed in the History Panel. The following events are tracked in the History Panel:

- When a document is created

- When a document is copied

- When a document is moved

- When a new version of document is made

- When document metadata is updated

- When a document has annotations added or modified

- Optionally, when a document is viewed

5.2.1 Viewing Document History and Properties

Document history and properties are displayed in the History Panel and Properties Panel of the viewer. The history and properties panels are displayed in either a bottom or side panel. On the Preferences Page you can specify the default display size of the panels, and you can resize the panels dynamically in the viewer by clicking and dragging the panel border. You can also select if and where each panel is displayed by default on the Preferences Page, and you can override the default setting temporarily for each document displayed in the viewer using the Viewer Menus.

This section has the following topics:

- Changing the Default Panel Display and Location

- Changing Panel Location While Viewing Documents

- Showing and Hiding Panels While Viewing Documents

5.2.1.1 Changing the Default Panel Display and Location

To change the default display and location of the history or properties panels, do the following:

1. Click **Preferences** in the banner region of the Oracle I/PM Home Page. The Preferences Page page is displayed.

2. From the **Placement of History Panel** or **Placement of Properties Panel** field under the Viewer Settings section, select one of the following:

   - **Hide**: Suppresses the display of the panel by default.

   - **Left Side**: Displays the panel in a panel to the left of the page region.

   - **Bottom**: Displays the panel in a panel on the bottom of the page region.

5.2.1.2 Changing Panel Location While Viewing Documents

You can change the location of the history and properties panels while viewing a document using the View menu. The change affects the current viewer session and any documents currently being viewed or opened in the current viewer session after making the change. Once the current viewer session is closed, the panel placement reverts to the preferences specified in the Viewer Setting Section of the Preferences Page.

To change the location of each panel while viewing the document, do the following:

1. With the document displayed in the viewer and a panel displayed on the bottom, select **View** then **History on Left** or **Properties on Left** to enable the menu item and display the panel on the left of the page region.

2. With the document displayed in the viewer and a panel displayed on the left, select **View** then **History on Left** or **Properties on Left** to disable the menu item and display the panel on the bottom of the page region.

5.2.1.3 Showing and Hiding Panels While Viewing Documents

You can show or hide the history and properties panels while viewing a document using the View menu. The change affects the current viewer session and any documents currently being viewed or opened in the current viewer session after making the change. Once the current viewer session is closed, the panel placement reverts to the preferences specified in the Viewer Setting Section of the Preferences Page.

To show or hide each panel while viewing the document, do the following:

1. With the document displayed in the viewer and a panel displayed on the left or bottom, select **View** then **Show History** or **Show Properties** to disable the menu item and hide the panel. If the panel is the last one displayed in the panel, the panel is also hidden.

2. With the document displayed in the viewer and a panel displayed on the left or bottom, select **View** then **Show History** or **Show Properties** to enable the menu item and display the panel. If the panel is the first one displayed in the panel, the panel is also displayed.

5.3 Working With Annotations

Provided you have the permissions to do so, you can add annotations to documents or view annotations added by others to make it easier to pass a document along through a process. Among other things, documents can be stamped *Approved*, have particular text highlighted, or have a note addressing a specific issue added. And security permissions can be set to hide an annotation to ensure that only the appropriate people have the rights to see it.

This section has the following topics:

- "Viewing and Hiding Annotations" on page 5-6
- "Creating Annotations" on page 5-7
- "Modifying Annotations" on page 5-11
- "Deleting Annotations" on page 5-11

5.3.1 Viewing and Hiding Annotations

Annotations can be viewed in either the basic or advanced viewer modes. In some cases when viewing a document, annotations may get in the way of seeing information on the document you need to see. For example, if information has been redacted. Using the Hide/Show icon in the advanced viewer mode you can hide annotations to which you have the proper permissions, and display only the document. To hide annotations, do the following:

1. With an annotated document displayed in the advanced viewer mode, click the **Hide/Show Annotations** icon in the Advanced Viewer Toolbar Options. Annotations are hidden. Click the icon again to display the annotations.

> **Note:** If some annotations are set to the Restricted security mode and you do not have rights to modify the annotation, you will not be able to hide them. For more information on annotation security rights, see "Assigning Annotation Security Level" on page A-20.

5.3.2 Creating Annotations

Annotations are created using the Advanced Viewer Toolbar Options of the Viewer Toolbar. Annotations can be created only when viewing a document in the advanced viewer mode. Selecting an annotation tool and clicking on a document creates an annotation and opens it up for editing. Different options are available depending on the type of annotation being created. All annotations must be assigned a security level when created.

This section has the following topics:

- Assigning Annotation Security
- Adding Text Annotations
- Adding Highlight Annotations
- Adding Line Annotations
- Adding Sticky Note Annotations
- Adding Redaction Annotations
- Adding Stamp Annotations

> **Note:** Annotations are placed based on coordinates. Content may shift beneath an annotation with inconsistent use of fonts on different computers. To help minimize annotation shift, verify that your annotation is placed properly by viewing it in the basic mode of the viewer after you have saved it.
>
> If your annotation has shifted, talk to your system administrator about ensuring that a consistent set of fonts is used across the server and clients.

5.3.2.1 Assigning Annotation Security

In some cases, not all annotations should be seen or allowed to be modified by all people. For example, upper management may annotate a request for proposal with pertinent information regarding an upcoming merger. Legally they may not be able to share that information with others in an organization who need access to that proposal, so the annotation permission is set to hide the annotation from those without proper permissions. Or perhaps a manager annotates a raise request denying the raise. The annotation can be restricted so the person who made the request can not approve it by modifying the annotation. Or a document may contain personal information such as Social Security numbers or health issues that need to be redacted and protected. Redaction annotation can be set to restricted to prevent others from hiding or modifying them to see the information.

Users are granted one or more of the following security permissions:

- **Standard**: Annotations appear on the document page for all users. They may be applied and changed only by users granted Standard annotation security permissions.

- **Restricted**: Annotations are visible to all users but can be modified only by a user granted the restricted permission. If you do not have the restricted permission (permission to change restricted documents), you can view the annotation but cannot alter it or change the permissions.

■ **Hidden**: Annotations are visible only to users that have been granted the hidden permission. Only users having the hidden permission can mark an annotation as hidden or modify existing hidden annotations.

> **Note:** If no annotation security is assigned to a person, they cannot create new or modify existing annotations. However, they still can view all Standard and Restricted annotations. This ensures that redaction annotations are applied for all people with rights to view a document.

Users must be granted the security level they assign to an annotation. For example, users assigned only the *restricted* security level can grant only the *restricted* security level to any annotation they create. Users that have been assigned the *standard* and *restricted* security levels by an administrator can specify a security level of *standard* or *restricted*, but not *hidden*.

If you need a different level of annotation security, talk to the person who manages security for Oracle I/PM.

> **Note:** Redaction annotations cannot be marked hidden.

To assign a security level to an annotation, do the following:

1. Create the annotation based on the procedure required for the type of annotation being created, or select an existing annotation to modify.

2. Select the appropriate security level from the security field in the annotation toolbar.

5.3.2.2 Adding Text Annotations

Text annotations allow you to overlay short comments on a viewed document. Text annotations are displayed directly on document. To add a text annotation, do the following:

1. With a document displayed in the advanced viewer mode, click the Text icon on the Viewer Toolbar, then click and drag to define the area of the document you want the text displayed. The Text Annotation dialog box is displayed.

2. Enter the text of the annotation in the dialog box. You can easily add your user name and the current date as defined on your computer system by clicking **Current User**, and **Current Date**.

3. Click **OK** to close the text annotation dialog box and display the Text Annotation Toolbar.

4. Use the text annotation toolbar to set the annotation security and modify the entered text font, font color, outline color, and background color.

5. Click on the cursor icon in the Viewer Toolbar to close the text annotation toolbar.

6. Click the **Save** icon in the Viewer Toolbar to save the document with the new annotation.

> **Note:** Navigating away from a viewed document without saving changes causes changes to be lost.

5.3.2.3 Adding Highlight Annotations

Highlight annotations allow you to overlay translucent colored boxes on a viewed document page highlighting specific text or other object on a document. To add a highlight annotation, do the following:

1. With a document displayed in the advanced viewer mode, click the Highlight icon on the Viewer Toolbar, then click and drag to define the area of the document you want the highlight to cover. The Highlight Annotation toolbar is displayed.

2. Use the highlight annotation toolbar to set the annotation security and modify the highlight color and transparency.

3. Click on the cursor icon in the Viewer Toolbar to close the highlight annotation toolbar.

4. Click the **Save** icon in the Viewer Toolbar to save the document with the new annotation.

> **Note:**   Navigating away from a viewed document without saving changes causes changes to be lost.

5.3.2.4 Adding Line Annotations

Line annotations allow you to overlay colored lines on a viewed document page to underline or point to specific text or other object on a document. To add a line annotation, do the following:

1. With a document displayed in the advanced viewer mode, click the Line icon on the Viewer Toolbar, then click and drag to define the area of the document you want the line to cover. The Line Annotation toolbar is displayed.

2. Use the line annotation toolbar to set the annotation security and modify the line color and end caps. You can choose to have an arrow on either, both, or no end of the line.

3. Click on the cursor icon in the Viewer Toolbar to close the annotation toolbar.

4. Click the **Save** icon in the Viewer Toolbar to save the document with the new annotation.

> **Note:**   Navigating away from a viewed document without saving changes causes changes to be lost.

5.3.2.5 Adding Sticky Note Annotations

Sticky note annotations allow you to overlay longer comments on a viewed document, in which you can format and insert other objects. Sticky note annotations display a small note icon on document which displays the full note when selected and opened. Additionally, all sticky note annotations in a document are listed in the Sticky Notes Panel when a document is viewed.

> **Note:** The contents of sticky notes are not downloaded or printed with the document, nor are they viewable through the REST Viewer. The contents of a sticky note can be printed, with limitations, by expanding the sticky note in the Sticky Notes Panel and printing the web page.

To add a sticky note annotation, do the following:

1. With a document displayed in the advanced viewer mode, click the Sticky Note icon on the Viewer Toolbar, then click the area of the document you want the text displayed. The Sticky Note Annotation Rich Text Editor is displayed.

2. Enter the text of the annotation in the dialog box. You can easily add formatting, bulleted lists, images, and other objects using the editing tools of the Sticky Note Annotation Rich Text Editor.

3. Click **OK** to close the editor and display the Sticky Note Annotation Toolbar.

4. Use the annotation toolbar to set the annotation security and modify the color of the sticky note displayed on the document.

5. Click on the cursor icon in the Viewer Toolbar to close the annotation toolbar.

6. Click the **Save** icon in the Viewer Toolbar to save the document with the new annotation.

> **Note:** Navigating away from a viewed document without saving changes causes changes to be lost.

5.3.2.6 Adding Redaction Annotations

Redaction annotations allow you to overlay completely opaque boxes on a viewed document page to cover sensitive text or other objects on a document. Redaction annotation permissions cannot be set to *Hidden*. To add a redaction annotation, do the following:

1. With a document displayed in the advanced viewer mode, click the redaction icon on the Viewer Toolbar, then click and drag to define the area of the document you want the redaction to cover. The Redaction Annotation toolbar is displayed.

2. Use the redaction annotation toolbar to set the annotation security.

3. Click on the cursor icon in the Viewer Toolbar to close the annotation toolbar.

4. Click the **Save** icon in the Viewer Toolbar to save the document with the new annotation.

> **Note:** Redaction annotations are placed based on coordinates and may shift with inconsistent use of fonts. If your redaction annotation has shifted, talk to your system administrator about ensuring that a consistent set of fonts is used across the server and clients.

> **Note:** Navigating away from a viewed document without saving changes causes changes to be lost.

5.3.2.7 Adding Stamp Annotations

Stamp annotations allow you to overlay predefined watermarks, or stamps, on a viewed document page that convey pertinent information about the status of a document. Stamp options are *Approved*, *OnHold*, *Received*, or *Rejected*. To add a stamp annotation, do the following:

1. With a document displayed in the advanced viewer mode, click the Stamp icon on the Viewer Toolbar, then click on the area of the document you want the stamp displayed. The Stamp Annotation toolbar is displayed.

2. Use the annotation toolbar to select the watermark, set the annotation security, modify the stamp transparency, and set the stamp size and rotation.

3. Click on the cursor icon in the Viewer Toolbar to close the annotation toolbar.

4. Click the **Save** icon in the Viewer Toolbar to save the document with the new annotation.

> **Note:**   Navigating away from a viewed document without saving changes causes changes to be lost.

5.3.3 Modifying Annotations

Once created, you can modify aspects of an annotation using the same annotation toolbar used when creating the annotation. To display the toolbar, click the annotation you want to modify. The toolbar is displayed. Once displayed, you can use the toolbar to modify the annotation in variety of ways, including:

- Change the font, font size, and font color of text annotations.

- Change the annotation text in text and sticky note annotations by clicking the text tool icon in the annotation toolbar to display the Text Annotation dialog box.

- Cut, copy, paste, reorganize and undo changes to content within a sticky note annotation using the Edit menu of the Rich Text Editor.

- Insert images, bulleted and ordered lists, tables, and other objects in a sticky note annotation using the Insert menu of the Rich Text Editor.

- Change an annotation background and border color using the background fill color and border color tools.

- Change the transparency of a highlight or stamp annotation using the slider to fade or darken the annotation.

- Resize or rotate a stamp annotation.

- Move the annotation to a different location on a page by clicking the center selection icon in a text box and dragging to a new location.

- Resize an annotation by clicking and dragging a gray square bordering the text box.

For more information on using the annotation toolbars, review the section on "Working With Annotations" on page 5-6, or refer to the section "Annotations" on page A-19 in the user interface section.

5.3.4 Deleting Annotations

To delete an annotation, do the following:

1. With a document displayed in the advanced viewer mode, click the annotation you want to delete. The annotation toolbar is displayed.

2. Press the delete key on your keyboard. The annotation is no longer displayed.

3. Click the **Save** icon in the Viewer Toolbar to save the document without the annotation.

> **Note:** Navigating away from a viewed document without saving changes causes changes to be lost.

5.4 Retrieving Documents

In some cases you may need to share or file documents outside of Oracle I/PM. In those cases you have the option to print out a physical copy, save an annotated copy of the document, or save a copy of the original document to a local or networked drive, based on the security rights granted to you.

5.4.1 Downloading Documents

You can download a document from a Search Form Criteria and Search Results Table using either the Search Results Toolbar or the Search Results Contextual Menu. You can also download a document from the viewer. You must have the proper permissions to view associated annotations in order to download a document. To download a document to a local or shared network directory from a search results table, do the following:

1. From a search results table, select the document you want to download.

2. Click **Download** in the toolbar. The Download Document Page is displayed.

3. Disable **Lock Document** if you want others to be able to modify the original document in I/PM. It is enabled by default.

4. Do one of the following:

   a. Click **Download Original** to save a copy of the document without any annotations and in the format in which it was uploaded to I/PM. For example, if the original file was a TIFF image, the downloaded file would be a TIFF image without any annotations. If the original file was a Microsoft Word document, the downloaded file would be a copy of the Microsoft Word document without any annotations. Note that the original document remains in I/PM, and only a copy of the document is downloaded. If you do not have rights to view the document without annotations, for example a document that is redacted, downloading the original file is denied.

   b. Click **Download TIFF** to save a copy of the original document in a TIFF format with all annotations on the document. This is useful if you want and annotations left on the downloaded document, or if the original document is in a format that you cannot open on your computer.

   The Download Document page is closed and a dialog box is displayed asking if you want to open or save the document to a local or network drive.

5. Make your selection and navigate to the location you want to save the file if necessary.

To download a document using the contextual menu, do the following:

1. From a search results table, right-click on the document you want to download. A contextual menu is displayed with the options also available from the toolbar.

2. Select **Download** from the contextual menu options. The Download Document Page is displayed.

3. Continue with the download process as detailed in the above process beginning with step 3.

5.4.2 Printing Documents

You can print a document and its annotations from the viewer using the Viewer Menus. Printing using the viewer menu will print the document and all annotations to which you have access.

To print a document, do the following:

1. With the document displayed in the viewer, select **File** then **Print**. A print dialog box is displayed.

2. Select your preferred printer and click **OK**.

Note: The contents of sticky notes are not downloaded or printed with the document. The contents of a sticky note can be printed, with limitations, by expanding the sticky note in the Sticky Notes Panel and printing the web page.

A

User Interface

This section contains information about the interface used with Oracle Imaging and Process Management. It covers the following topics:

- "Icons" on page A-1
- "Home Page" on page A-1
- "Preferences Page" on page A-2
- "Upload Document Page" on page A-5
- "Search Pages" on page A-6
- "Copy Document Page" on page A-11
- "Move Document Page" on page A-12
- "Update Document Page" on page A-13
- "Viewer" on page A-14
- "Download Document Page" on page A-28

A.1 Icons

The following icons are used in the Oracle I/PM user interface and may not be explicitly identified. Note that a description of each icon is displayed when holding your cursor over it. The following table provides the names and graphics of some unidentified icons. The graphics may change slightly depending on the skin chosen in the Personal Information Section of the Preferences Page.

Icon	Description
◀	Collapse/Restore pane
✖	Close current window or tab
▼	More options
»	Click to display icon that does not fit in toolbar

A.2 Home Page

The home page is displayed after logging in to Oracle I/PM. The navigator pane displays panels to which you have access, such as the Searches panel which contains

predefined searches. If you have administrative rights, there may also be links to administrative panels such as Manage Searches. For more information about administrative tasks, see the *Oracle Fusion Middleware Administrator's Guide for Oracle Imaging and Process Management*.

Next to the navigator pane is the page region. It is used to display search forms, search results, and the user Preferences page. Above the page region is the banner area, with links to the Preferences page and other functionality, such as the ability to refresh the page or log out of Oracle I/PM. Both the navigator pane and banner area can be hidden or exposed by clicking the Collapse Panel icons at the edge of each area.

The following table describes the elements available on the page.

Element	Description
Help	Displays online help.
Refresh	Refreshes the information in the page region. Note that if a Search Form Criteria and Search Results Table is displayed in the page region, it is not updated when clicking Refresh, as this does not execute the search again. If you or another user updates document metadata, the new metadata is not displayed in the search results table until you run the search again by clicking **Search** in the search page.
Preferences	Displays Preferences page where you can add or update Personal Information and Viewer Settings.
Logout	Logs you out of Oracle I/PM.
About	Displays Oracle I/PM version information.
Panel headings	Click the panel name or icon when closed to expand the panel and view its contents. Click the panel name or icon when open to collapse the panel and hide its contents.

A.3 Preferences Page

The Preferences page is used to set various aspects of the Oracle I/PM interface. It is accessed by clicking **Preferences** in the global links region of the Home page. In addition to information unique to you, such as preferred user interface skin and your time zone, you can also control aspects of the user interface. When you open the Preferences page, it is displayed over the previous page. Closing the Preferences page uncovers the Home Page if you have not executed a search, or search tabs, if you have. This way you can access the Preferences page at any time without navigating away from your current search results.

The Preferences page is divided into two main sections: the Personal Information Section and the Viewer Setting Section.
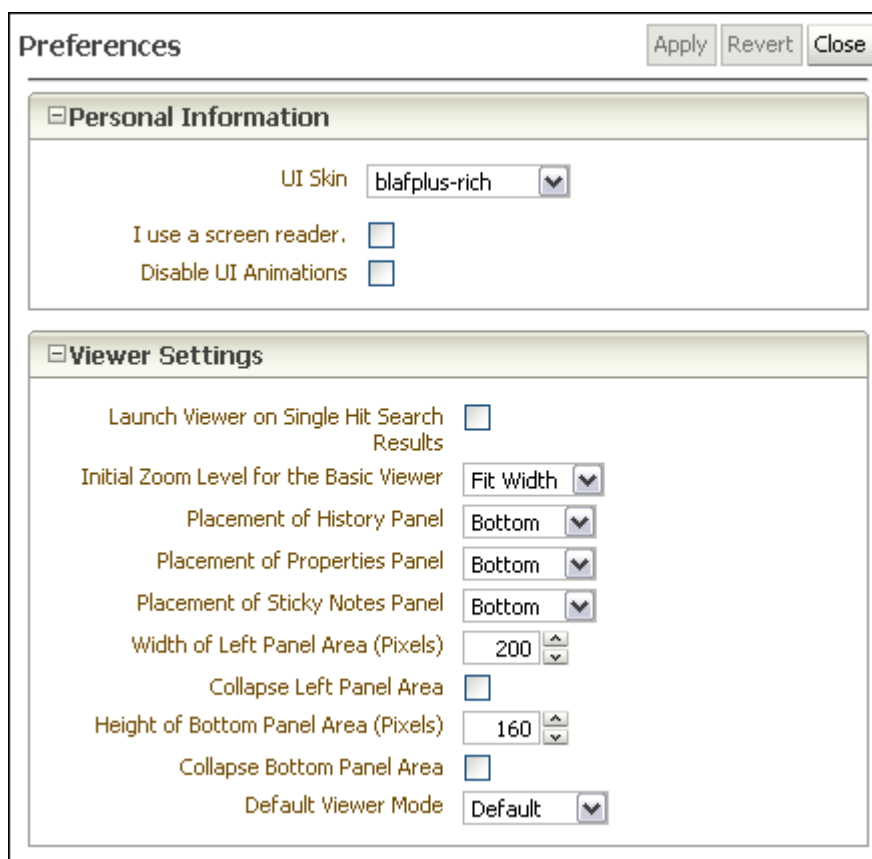
The following table describes the elements available on the page.

Element	Description
Apply	Applies the updated setting changes.
Revert	Cancels any changes and restores previous settings.
Close	Closes the Preferences page.

A.3.1 Personal Information Section

The Personal Information section lets you specify information unique to you and modify how the Oracle I/PM user interface looks using pre-installed formats called skins. Click the Expand or Collapse icon next to the Personal Information section to hide or display the fields for modifying your personal information.
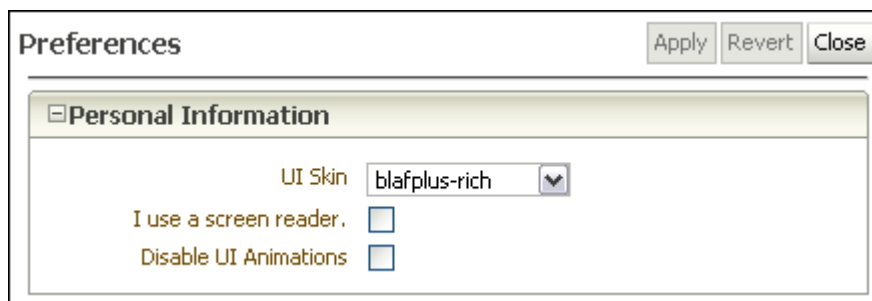
The following table describes the elements available on the page.

Element	Description
UI Skin	Skins determine how the Oracle I/PM user interface looks, including the color and shape of menus, tabs, fonts, and other aspects of the interface. Select a skin from the pick list and click **Apply** to view the new user interface skin.
I use a screen reader.	Enable if you use a screen reader.
Disable UI Animations	Enable this box to disable animated menus and speed display performance on some systems.

A.3.2 Viewer Setting Section

The Viewer Settings section lets you modify various aspects of the viewer used to view documents and annotations. Click the Expand or Collapse icon next to the Viewer Settings section to hide or display the fields for modifying how information about a document is displayed in the document viewer.

The following table describes the elements available on the page.

Element	Description
Launch Viewer on Single Hit Search Results	Enable to open a document in the default viewer automatically if it is the only search result.
Initial Zoom Level for the Basic Viewer	Specify the magnification at which documents are displayed when opened in the basic viewer. Options include a percentage of the document's original size, or the following: ■ **Best Fit**: Fits the document into the viewer page region. ■ **Fit Width**: Fit the width of the document in the viewer display area. ■ **Fit Height**: Fit the height of the document in the viewer display area. Note that these settings do not apply to the advanced viewer mode.

Element	Description
Placement of History Panel	Specify where the history panel is displayed in the viewer. Options are: ■ **Hide**: The panel is not displayed. ■ **Bottom**: Displays the panel horizontally at the bottom of the page. ■ **Left Side**: Displays the panel vertically on the left of the page.
Placement of Properties Panel	Specify where the properties panel is displayed in the viewer. Options are: ■ **Hide**: The panel is not displayed. ■ **Bottom**: Displays the panel horizontally at the bottom of the page. ■ **Left Side**: Displays the panel vertically on the left of the page.
Placement of Sticky Notes Panel	Specify where the sticky notes panel is displayed in the viewer. Options are: ■ **Hide**: The panel is not displayed. ■ **Bottom**: Displays the panel horizontally at the bottom of the page. ■ **Left Side**: Displays the panel vertically on the left of the page.
Width of Left Panel Area (Pixels)	Specify the width of the left panel area in pixels.
Collapse Left Panel Area	Enable to hide the left panel area when a document is first opened. The panel can be expanded after the document is opened by clicking the expand icon.
Height of Bottom Panel Area (Pixels)	Specify the height of the bottom panel area in pixels.
Collapse Bottom Panel Area	Enable to hide the bottom panel area when a document is first opened. The panel can be expanded after the document is opened by clicking the expand icon.
Default Viewer Mode	Specify the viewer mode used to open a document by default. Options are: ■ Default: The default choice selected by the system administrator. ■ Basic: The basic viewer mode allows you to view annotations but not add or edit them without switching to the advanced viewer mode. Set to Basic if you rarely add or edit annotations. ■ Advanced: The advanced viewer mode allows you to add or edit annotations to a document provided you have the rights to do so. Set to Advanced if you frequently add or edit annotations to documents.

A.4 Upload Document Page

The Upload Document Page is used to upload new documents to Oracle I/PM. It is accessed from the navigation pane by clicking **Tools** and then **Upload Document**.

The information on an Upload Document page is dependent on how it is accessed and on the information requirements of the application in which the document resides. If an application requires more information, additional fields are displayed after you select an application from the Select an Application field.

The following table describes the elements available on the page.

Element	Description
Open Viewer	Opens the document viewer so you can open, review, and annotate a document before uploading.
Upload	Submits the specified document image to Oracle I/PM.
Reset	Cancels any changes and restores previous settings.
Close	Cancels the upload and closes the Upload Document page.
Select an Application	Select an application in which this document is to reside. This field is required. Once an application is selected, additional metadata fields unique to the application are displayed.
Document Image	Specify an electronic file to upload to the system. Click **Browse** to navigate through your file system to select the file. The document image file can be any electronic file, but must conform to a format capable of being converted for display in the document viewer to be viewed.This field is required. Note that this field is hidden if you click **Open Viewer**. If using the viewer to upload a document, navigation to the electronic file is done through the Viewer Toolbar.

Note that if using your keyboard rather than your mouse to select the Browse button, use the Space bar to execute the Browse button function and open the dialog box. The Enter key does not execute the Browse button function. |
Description	A description of the application is displayed if one was specified when the application was created. It cannot be edited.
Metadata fields	Additional metadata fields are displayed on the Upload Document page when an application is selected. The additional fields are unique to each application and are defined by the person who created the application. Required fields are noted with an asterisk (*).
Confirmation Message	Once a document is successfully uploaded, a confirmation message is displayed at the bottom of the page. Clicking the message opens the document in the Viewer.

A.5 Search Pages

Use search pages to locate and access content in Oracle I/PM. Click a search link in the navigator pane to display the search page. Click another search link to display a new

tab. Using multiple tabs can be useful when comparing content, such as an invoice with a purchase order.

Each search page has two sections: the search form criteria section and the search results section that displays after a search has been executed. The criteria section is a predefined form where you input the criteria for which you want to search. The results section displays a list of all content in Oracle I/PM to which the user has access that matches the specified criteria. The criteria section can be collapsed or expanded by clicking the collapse pane icon.

The criteria in the search form is predefined by the person who creates the search. This criteria is based on the metadata of the application in which the document resides and can be different for each search. For example, you may have an *Invoices* search defined that uses an invoice number or issue date, and a *Contracts* search that allows searching by company ID or business unit.

This section covers the following topics:

- "Picklist Data Field Input Operators" on page A-7
- "Search Form Criteria and Search Results Table" on page A-8
- "Reorder Columns Page" on page A-11

A.5.1 Picklist Data Field Input Operators

The following operators may be available using picklists to aid in your search. These picklists will be between the existing search parameter name and the search field.

Operator	Description
=	Equal to. Note that wildcard characters work for text fields. The * character matches 0 to many and the ? matches exactly any one character. For example, you can enter **Sm?th** to find *Smith* but not *Smythe* or *Smooth*. Entering **Sm*th?** would find *Smythe* and *Smiths* but not *Smithee*. Entering **Sm*th*** would find *Smith*, *Smythe*, and *Smithee*.
Begins with	Type a letter or number that is at the beginning of the parameter name. For a text field, this is identical to setting the operator to = and entering the first letters followed by the wildcard character *. For example, setting the operator to **Begins with** and enter **And** is the same as setting the operator to **=** and entering **And***. Each would return *Anderson*, *Andersons*, and *Andreeson*.
Ends with	Type a letter or number that is at the end of the parameter name. For a text field, this is identical to setting the operator to = and entering the wildcard character * followed by the last letters. Wildcard characters are accepted in text fields and behave as described in the descriptions for the operators *Begins with* and =.
>	Greater than
>=	Greater than or equal to
<	Less than
<=	Less than or equal to
<>	Not equal to

A.5.2 Search Form Criteria and Search Results Table

The columns in the results section are based on the application or applications being searched. A single search may span more than one application, and columns from each application are merged. Like the search criteria, they are different for each search. The columns displayed in the results can be reordered or hidden using options in the View menu. Actions can be taken on a single document or multiple documents in the search results section by selecting a document or documents and using either the Search Results Toolbar or the Search Results Contextual Menu.
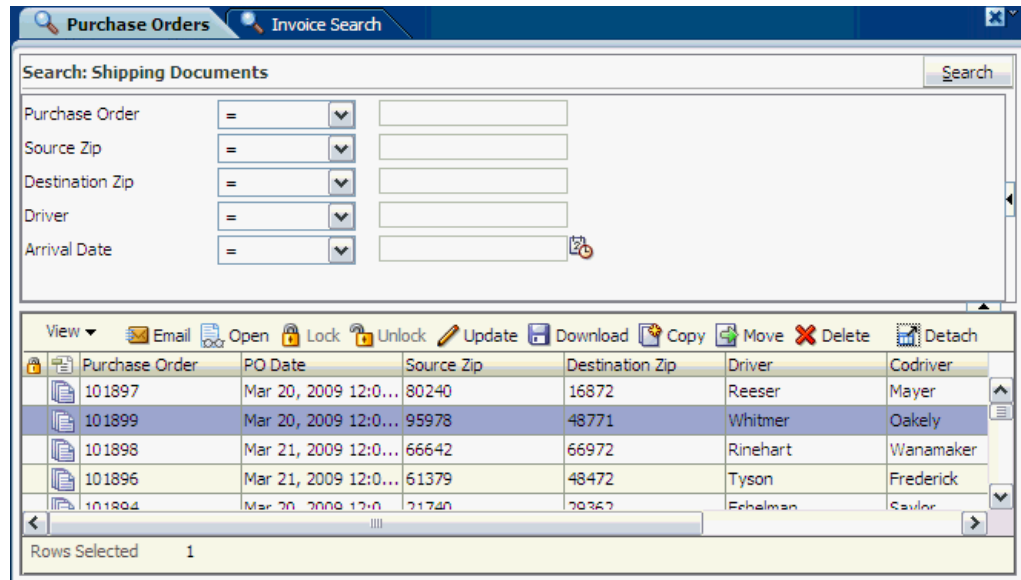
The following table describes the elements available on the page.

Element	Description
Search Tabs	Click a search tab to highlight the tab and display the associated search.
Close Tab icon	Click the Close Tab icon on the highlighted search tab to close the tab.
More Options contextual menu	Right-click on a tab to display the More Options contextual menu with the following options: ■ **Close All**—Closes all search tabs ■ **Close All But Current**—Closes all search tabs except the highlighted one
Search fields	Search fields are dependent on the application or applications being searched and are defined by the person who created the search. A single search may span more than one application.
Search Results	Displays a list of documents matching the entered criteria to which a user has access once the search run.

A.5.2.1 Search Results Toolbar

The search results toolbar enables you to act on selected documents in a search results listing. It is located above every search result.

Element	Description
View	Clicking **View** displays the following options: ■ **Columns**: Determines which columns are displayed in the results section. By default, all columns are displayed. Select a column in the Columns submenu to switch between displaying and hiding it. ■ **Detach**: Maximizes the search results table to fill the current window. ■ **Reorder Columns**: Opens the Reorder Columns Page. Select a column in the Reorder Columns Page and click the appropriate arrow to move the item up or down in the list. The higher in the list a column appears, the farther to the left of the search results it is displayed.
Email	Opens a new e-mail message using your default e-mail client that contains a link to the search results.The recipient must log in and have permissions to the search and to the documents in order to view the results.
Open	Opens the document in a separate browser window.
Lock	Locks a document and prevents it from being updated, annotated, or moved by anyone other than the user that has it locked.
Unlock	Unlocks a document. Only the Lock Administrator or the user who previously locked it can unlock the document. Once unlocked, others can perform lock-restricted actions.
Update	Displays the Update Document Page where you can replace a document and update its metadata. Depending on the configuration of the application, an updated document is overwritten or a new version is created.
Download	Displays the Download Document Page, allowing you to save a copy of the original document without annotations, or an annotated TIFF image of the document, dependant on your security rights.
Copy	Displays the Copy Document Page where you can create a copy of the document and its metadata as a new content item. Note that to copy a document between applications, you must have security rights to create a document in the destination application.
Move	Displays the Move Document Page where you can update the metadata and move the document to a new application without making a copy. For example, you can move an invoice in the Outstanding Invoice Application to the Paid Invoice Application. Note that to move a document between applications, you must have security rights to delete a document from the source application and security rights to create a document in the destination application.
Delete	Deletes a document from Oracle I/PM provided you have rights to do so. A dialog box is displayed for you to confirm or cancel the deletion. When a document is deleted, it and all associated metadata and annotations are permanently removed from I/PM and are no longer available for access through search results.
Detach	Maximizes the search results table to fill the current window.

A.5.2.2 Search Results Contextual Menu

Right-click a specific content item in search results to display a contextual menu containing the same options specific to content as the Search Results Toolbar.

A.5.3 Reorder Columns Page

The Reorder Columns page is displayed when selecting **View**, then **Columns**, and then **Reorder Columns** from the Search Results Toolbar. Enable a column and click the appropriate arrow to reposition the column in the display order. Click **OK** to apply the change.
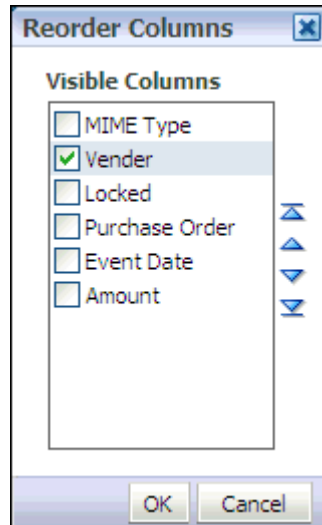
A.6 Copy Document Page

The Copy Document page is used to copy an existing document, its metadata and annotations either within the same application or into a different application. If being copied into the same application, the metadata fields are populated with values from the original document when the application is selected. If copying to a different application, metadata fields that have the same name in each application are populated with the existing document metadata, but metadata fields unique to the new application are left blank. To access the Copy Document page, select a document from a Search Form Criteria and Search Results Table then select **Copy** from either the Search Results Toolbar or the Search Results Contextual Menu.

The following table describes the elements available on the page.

Element	Description
Select an Application	Select an application in which the new document is to reside. This field is required. Additional metadata fields are displayed once an application is selected.
Metadata fields	Additional metadata fields are displayed on the Copy Document page when an application is selected. The additional fields are unique to each application and are defined by the person who created the application. Required fields are noted with an asterisk (*).
Copy existing annotations	Enable this to copy existing annotations with the document.
Copy	Click to submit the document copy request.
Confirmation	The confirmation message is displayed after the document copy request has been submitted and the document has been successfully copied.

A.7 Move Document Page

The Move Document page is used to move an existing document, its metadata and annotations out of the current application and into a different application. When moving, shared metadata fields are populated with the existing document metadata, but metadata fields unique to the new application are left blank. To access the Move Document page, select a document from a Search Form Criteria and Search Results Table and then select **Move** from either the Search Results Toolbar or the Search Results Contextual Menu.

The following table describes the elements available on the page.

Element	Description
Select an Application	Select an application in which this document is to reside. This field is required. Additional metadata fields are displayed once an application is selected.

Element	Description
Metadata fields	Additional metadata fields are displayed on the Move Document page when an application is selected. The additional fields are unique to each application and are defined by the person who created the application. Required fields are noted with an asterisk (*).
Move	Click to submit the document move request.
Confirmation	The confirmation message is displayed after the document move request has been submitted and the document has been successfully moved.

A.8 Update Document Page

The Update Document page is used to update the metadata of an existing document or to replace it with a new document. Depending on the application versioning settings, a new version of the document may be created or the document may be replaced by the updated one. To access the Update Document page, select a document from a Search Form Criteria and Search Results Table and then select **Update** from either the Search Results Toolbar or the Search Results Contextual Menu.

> **Note:** You can also update the document metadata by clicking **Update** on the Properties Panel of the Viewer. This does not display the Update Document page, but instead enables the metadata fields in the properties panel to be modified. Once changes have been made to the fields, click **Update** again to submit the changes.

The following table describes the elements available on the page.

Element	Description
Document ID	The unique document identifier automatically generated by the system.

Element	Description
Original File Name	Original name of the file that is being updated.
Application Name	Name of the application in which the document resides.
Document Image	Enter the name of the updated file to upload. Click **Browse** to navigate to the file and select it to populate the field. Leave this field blank if updating the document metadata fields only.
	Note that if using your keyboard rather than your mouse to select the Browse button, use the Space bar to execute the Browse button function and open the dialog box. The Enter key does not execute the Browse button function.
metadata fields	Metadata fields differ based upon the application selected.
Keep Lock or Lock Document	After updating a document, enable this to keep a previously locked document locked (Keep Lock) or to lock it (Lock Document). Locking a document prevents it from being updated or moved by anyone other than the user that has it locked.

A.9 Viewer

The viewer is used to display documents and annotations you have permissions to see. It is accessed from a Search Form Criteria and Search Results Table by clicking the icon in the MIME Type column, or selecting a document from the search results and clicking **Open** in the Search Results Toolbar. Additionally, all metadata associated with a document is displayed in the Properties panel of the viewer, and all actions taken on a document are displayed in the History panel.

The viewer can switch between a basic mode, used to view documents and annotations, and an advanced mode, which additionally allows you to add and edit annotations, provided you have the security permissions to do so. You can specify which mode to use by default in the Preferences Page.

> **Note:** Larger and more complex documents require larger amounts of memory to be available to the viewer. If using the viewer in advanced mode, it is recommended that you have a minimum of 768 megabytes of memory available. If you are uncertain if you have enough memory on your system, or are having difficulty viewing documents, contact your system administrator.
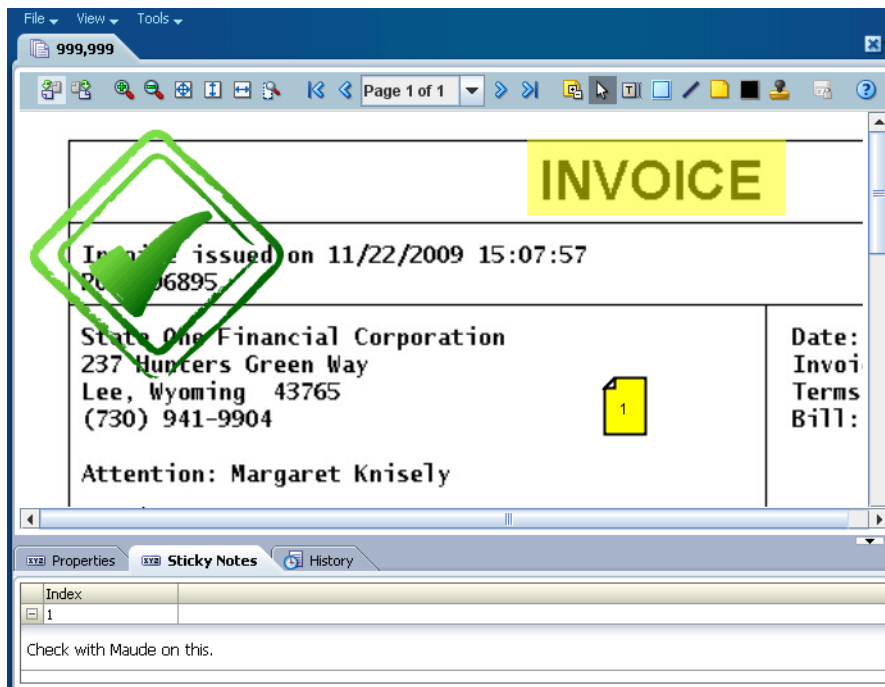
This section covers the following topics:

- "Viewer Menus" on page A-15
- "Properties Panel" on page A-16
- "History Panel" on page A-17
- "Sticky Notes Panel" on page A-17
- "Viewer Toolbar" on page A-17
- "Annotations" on page A-19

A.9.1 Viewer Menus

In addition to viewing a document, the viewer can be used to print, download, or e-mail documents. The following menus and options are available in the viewer above the document tabs.

The following table describes the elements available on the page.

Element	Description
File	Use the File menu to download, print, or close displayed documents. It has the following options: ■ **Download**: Select to download the document to a local or shared drive. ■ **Close Current Tab**: Select to close the currently displayed document tab. ■ **Close All But Current Tab**: Select to close all document tabs except the one currently displayed. ■ **Close All Tabs**: Select to close all currently displayed document tabs but leave the viewer page open. ■ **Print**: Select to print the currently displayed document tab. ■ **Close Window**: Select to close all displayed tabs and the viewer page.
View	The View menu allows you to change viewer modes and show or hide document history and properties. It has the following options: ■ **Use Advanced Viewer**: Select to switch from basic viewer mode to advanced viewer mode, where you can add or edit annotations on documents you have permissions to do so. ■ **Use Basic Viewer**: Select to switch from advanced viewer mode the basic viewer mode. ■ **Show History**: Select to alternately hide or display the History panel, showing all actions on a document while stored in I/PM. ■ **Show Properties**: Select to alternately hide or display the Properties panel, listing all document metadata. ■ **Show Sticky Notes**: Select to alternately hide or display the Sticky Notes panel, listing all sticky note annotations. ■ **History on Left**: Select to display the History panel alternately on the left or on the bottom of the page region. ■ **Properties on Left**: Select to display the Properties panel alternately on the left or on the bottom of the page region. ■ **Sticky Notes on Left**: Select to display the Sticky Notes panel alternately on the left or on the bottom of the page region.
Tools	The Tools menu allows you to e-mail a displayed document or view a list of previous versions of a document. ■ **Email Document**: Select to open a new e-mail message from your default e-mail client, with a link to the document. Only people with the proper permissions will have access to the document. ■ **Versions**: Select to display a list of all versions of the document. Select from the list and click **Open** to view a previous version.

A.9.2 Properties Panel

The properties panel displays all metadata associated with a document, and provides the option to update metadata. Clicking **Update** displays the Update Document Page within the properties panel. The properties panel can alternately be displayed or hidden dynamically by selecting the **View** menu then enabling or disabling **Show Properties**. Similarly, placement of the properties panel can be alternated between the left side and the bottom of the page by selecting the **View** menu then enabling or disabling **Properties on Left**. The entire bottom or left pane can dynamically resized by clicking on the pane border and dragging the border to the desired location. A default size can be specified in the Viewer Setting Section of the Preferences Page.

Also, the entire bottom or left pane can be collapsed by clicking the Collapse pane icon, or expanded by clicking the Restore pane icon. See the section "Icons" on page A-1 to see an image of the icons.

A.9.3 History Panel

Each action performed on a document in Oracle I/PM is tracked and displayed in the history panel. The following events are tracked:

- When a document is created

- When a document is copied

- When a document is moved

- When a new version of document is made

- When document metadata is updated

- When a document has annotations added or modified

The history panel can alternately be displayed or hidden dynamically, resized, or collapsed in the same manner as the properties panel. See the Properties Panel section for details.

A.9.4 Sticky Notes Panel

Displays a list of all sticky note annotations to which you have access on a document. Sticky Note annotations are numbered and listed numerically in the list. Clicking the icon to the left of the sticky note number in the panel expands the panel and displays the text of the sticky note. (Note that the icon may change depending on the skin choice selected on the Preferences Page.) Text formatting is retained, but any inserted graphics are stripped from display in the list. Inserted graphics are maintained in the actual annotation.

The sticky notes panel can alternately be displayed or hidden dynamically, resized, or collapsed in the same manner as the properties panel. See the Properties Panel section for details.

A.9.5 Viewer Toolbar

Several icons are used throughout the viewer user interface without explicit identification. These icons provide functionality when clicked. Identifying text is displayed when hovering your cursor over an icon. Options on the viewer toolbar change depending on if you are using the basic or advanced mode. This section details both the Basic Viewer Toolbar Options and the Advanced Viewer Toolbar Options.

A.9.5.1 Basic Viewer Toolbar Options

The basic viewer toolbar offers options to zoom and rotate documents as well as navigate multiple pages.

Name	Icon	Function
Rotate Left 90 Degrees		Rotates the document 90 degrees counter-clockwise.
Rotate Right 90 Degrees		Rotates the document 90 degrees clockwise.

Name	Icon	Function
Zoom In		Enlarges the document incrementally in the viewer page region.
Zoom Out		Reduces the document incrementally in the viewer page region.
Zoom to Best Fit		Enlarges or reduces the document to fit into the viewer page region.
Zoom to Fit the Height		Enlarges or reduces the document to fit the height of the document in the viewer page region.
Zoom to Fit the Width		Enlarges or reduces the document to fit the width of the document in the viewer display area.
Start Rubberband Zoom Mode		Enlarges the selected area of the document to fit in the viewer page region.
Go to First Page		Click to view the first page of a multi-page document.
Go to Previous Page		Click to view the page preceding the current page of a document.
Go to Page Number	1 of 8	Select a page to go to of a multi-page document.
Go to Next Page		Click to view a page following the current page of a document.
Go to Last Page		Click to view the last page of a multi-page document.
Help		Click call up the product help. When in basic mode, clicking the icon displays the Viewer help in a separate window. When in advanced mode, clicking the icon enables a question mark cursor to position over an existing annotation or other toolbar icon. Using the question mark cursor to click on an existing annotation or toolbar icon displays contextual help about the item in a separate window.

A.9.5.2 Advanced Viewer Toolbar Options

In addition to the display and navigation options available on the basic viewer toolbar, the advanced viewer toolbar adds options to add and edit annotations if you have rights to do so, as well as open and print documents.

Name	Icon	Function
Open a Local File		Displays a standard dialog box to open a local file. This also allows for opening files in networked directories if the networked directory is mapped as a local drive letter. Note that this option is only available when the viewer is opened from the Upload Document Page.
Show/Hide Annotations		Click to switch between showing and hiding annotations.

Name	Icon	Function
Cursor		Enables the user to select an existing annotation in the viewer page region.
Text		Select then drag on document to display the Edit Annotation Content dialog box to add a text annotation.
Highlight		Select then drag on document to highlight a portion of a document. Opacity and color are controlled by the accompanying toolbar.
Line		Select then drag on document to add a line notation for underlining or striking through a word or image on a document. Color and inclusion of arrowheads are controlled by the accompanying toolbar.
Sticky note		Select then click document to display the Rich Text Editor for adding a sticky note annotation to a document. Note color is controlled by the accompanying toolbar.
Redaction		Select then drag on document to cover a portion of a document.
Stamp		Select then click document to add a predefined watermark annotation to a document. There are four default stamp options: ■ Approved ■ On Hold ■ Received ■ Rejected The stamp message, size, orientation, and opacity is controlled by the accompanying toolbar.
Save the Current Document Annotations		Click to save modifications to document annotations. If the icon has a lock on it, the document is locked by someone else and saving the annotations may fail unless you first contact them and have them unlock the document.
Help		Click call up the product help. When in basic mode, clicking the icon displays the Viewer help in a separate window. When in advanced mode, clicking the icon enables a question mark cursor to position over an existing annotation or other toolbar icon. Using the question mark cursor to click on an existing annotation or toolbar icon displays contextual help about the item in a separate window.

A.9.6 Annotations

Permissions are assigned for the different levels of annotations: standard, restricted and hidden as described in the section Assigning Annotation Security Level. If you need a permission level you do not have, talk to the person who manages security for Oracle I/PM. If you have the proper permissions to do so, you can annotate documents and view or edit the annotations made by others, as well as view when and

by whom an annotation was created and last modified using the Creator/Last Modifier Icon and Dialog. You can create the following annotations:

- "Text Annotation" on page A-21

- "Highlight Annotation" on page A-23

- "Line Annotation" on page A-24

- Sticky Note annotations, as described in "Sticky Note Annotation Rich Text Editor" on page A-24 and "Sticky Note Annotation Toolbar" on page A-26

- "Redaction Annotation" on page A-27

- "Stamp Annotation" on page A-27

A.9.6.1 Assigning Annotation Security Level

You must assign each annotation a security level. After you create an annotation, a toolbar appears listing the security options to which you have access for the annotation. Only security permissions assigned to you are listed. For example, if you are assigned only the standard security level, only the standard security level will be listed in the menu as an option for you to assign. To assign a security level to an annotation, select the security level from the toolbar menu. Note that Redaction annotations cannot be marked Hidden.
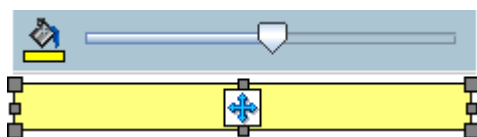

The following table describes the elements available on the page.

Element	Description
Standard	Standard annotations appear on the document page for all users. They may be applied and changed by users granted permission to Standard annotations.
Restricted	Restricted annotations appear to all users but cannot be modified by users who have not been granted permission to Restricted annotations. When viewing, exporting, or rendering, restricted annotations will be burned into the image if the user does not have Restricted permission.
Hidden	Hidden annotations appear to users who have been granted permission to view Hidden annotations. Redaction annotations cannot be marked Hidden.

A.9.6.2 Creator/Last Modifier Icon and Dialog

When selected, all annotation toolbars have an icon to the right of the security level in the toolbar menu. Clicking the icon displays when and by whom the annotation was first created and last modified.
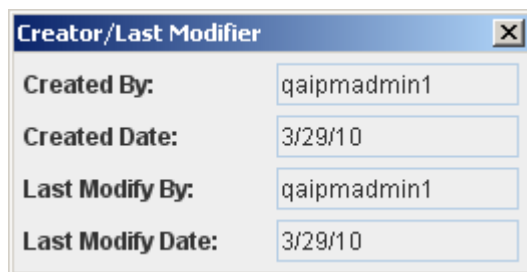
The following table displays the Creator/Last Modifier icon and describes its function.

Icon	Description
	Click to display the Creator/Last Modifier dialog with details on the annotation history.

A.9.6.3 Text Annotation

Text annotations allow you to leave notes on a document. To add a text annotation, select the text tool, then click and drag the mouse in the Viewer to define the size, shape, and position of the annotation. After releasing the mouse button, the Edit Text dialog box is displayed.
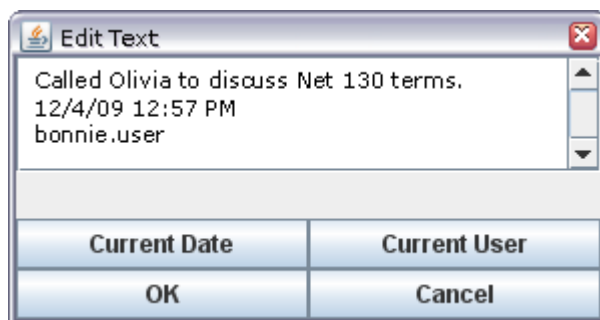
The following table describes the elements available on the page.

Element	Description
Current Date	Click to insert the current date into the text field.
Current User	Click to insert your name in the text field.
OK	Click to save changes to the text annotation.
Cancel	Click to cancel creation of a new text annotation or changes to an existing text annotation.

Once created, a text annotation can be selected by clicking on it in the document in the Viewer. Selecting a text annotation displays the bounding box defining the size of the annotation, which you can use to move, resize, or delete it. Selecting a text annotation also displays the Text Annotation Toolbar that enables you to format text within the text annotation.
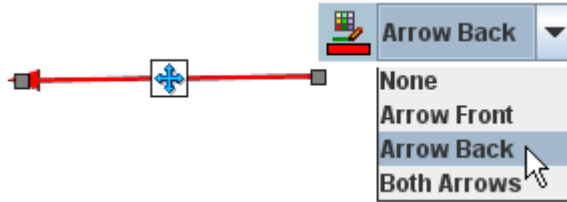
A.9.6.3.1 Text Annotation Toolbar The following table describes the elements available on the toolbar.

Icon	Description
	Click to display the Color Palette from which to choose the background color of the selected text annotation.
	Click to display the Color Palette from which to choose the border color of the selected text annotation.
	Click to display the Color Palette from which to choose the font color of the selected text annotation.
	Click to display the Edit Annotation Content dialog box to add or edit text in the selected text annotation.
	Click the font name to choose from a list of available fonts for the text in the selected text annotation. Click the number to select the point size of the text.
	Click and drag to move the text annotation to another location on the document.
	Click and drag to resize the text annotation.

A.9.6.3.2 Color Palette

The following table describes the elements available on the page.

Element	Description
Palette Tabs	Used to define the color being used. Depending on the context used to display the color palette, it controls the color of text, backgrounds, notes, borders, and lines. Colors can be defined using several methods, one for each tab:
	■ **Swatches**: Color is selected by clicking a small color area, called a swatch.
	■ **HSB**: Color is selected by setting the hue, saturation, and brightness. Values can be set numerically or by a combination of clicking the color pattern and adjusting the brightness using the slide control. Corresponding RGB values are also displayed.
	■ **RGB**: Color is selected by setting the red, green, and blue values. Settings can be defined numerically or by using the corresponding slide controls.
Preview Area	Displays an example of how the selected setting will display.
OK	Click to save the settings.
Cancel	Click to cancel changes made and return to previous settings.

A.9.6.4 Highlight Annotation

Highlight annotations overlay a translucent highlight to an area of a document. They are added by selecting the highlight tool, then clicking and dragging over the document in the Viewer to create a highlight annotation. Doing so displays the Highlight Annotation Toolbar.

The following table describes the elements available on the toolbar.
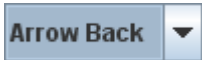
Icon	Element
	Click to display the Color Palette from which to choose the background color of the selected highlight annotation.
	Click and drag to change the opacity of the selected highlight annotation. Moving the slider to the left makes the highlight more translucent. Moving the slider to the right makes the highlight more opaque.
	Click and drag to move the highlight annotation to another location on the document.
	Click and drag to resize the highlight annotation.

A.9.6.5 Line Annotation

Line annotations draw a line on a document. Lines can be used to underline, strike through, or point to text or other objects in a document. They are added by selecting the line tool, then clicking and dragging over the document in the Viewer to create a line. Doing so displays the Line Annotation Toolbar.

The following table describes the elements available on the toolbar.

Icon	Description
	Click to display the Color Palette from which to choose the line color of the selected line.
	Click to select an option for terminating the line annotation with an arrowhead. ■ **None**: There are no arrowheads on the line. ■ **Arrow Front**: An arrowhead terminates the line at its point of origin. ■ **Arrow Back**: An arrowhead terminates the line at its end point. ■ **Both Arrows**: Arrowheads terminate both ends of a line.
	Click and drag to move the highlight annotation to another location on the document.
	Click and drag to resize the highlight annotation.

A.9.6.6 Sticky Note Annotation Rich Text Editor

Sticky note annotations can be longer than text annotations and allow more formatting options. In addition to being placed on a document, they are also displayed in the Sticky Notes Panel in the Viewer. You add them by selecting the sticky note tool, then clicking on the document in the Viewer. Doing so displays the Rich Text Editor. After a note is created, clicking on it displays the Sticky Note Annotation Toolbar.
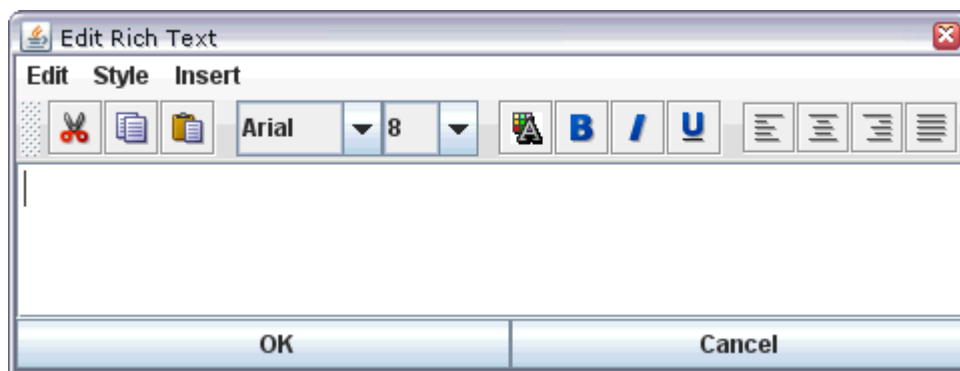
The following table describes the elements available on the toolbar.

Item	Description
Edit	Enables selected text to be moved around a note.
	■ **Undo**: Changes the last edit made.
	■ **Redo**: Reapplies an edit that was undone.
	■ **Cut**: Deletes the selected text and copies it to memory for insertion at another point in the note.
	■ **Copy**: Copies the selected text to memory for use at another point in the note.
	■ **Paste**: Inserts text that was either cut or copied into memory at the cursor position in the note.
	■ **Select All**: Selects all the text of the note.
Style	Enables the appearance of selected text to be modified.
	■ **Choose Text Color**: Displays the Color Palette from which to choose the color of the selected text.
	■ **Bold**: Makes the selected text appear bold.
	■ **Italic**: Displays the selected text in italics.
	■ **Underline**: Underlines the selected text.
	■ **Align Left**: Justifies the text to the left of the note.
	■ **Align Center**: Center the text in the note.
	■ **Align Right**: Justifies the text to the right of the note.
	■ **Justify**: Spaces the text so that text is justified to both the left and right sides of the note.
Insert	Enables insertion of additional objects.
	■ **Date**: Puts the current date in the note as defined by your computer clock.
	■ **Horizontal Line**: Inserts a horizontal line in the note.
	■ **Image**: Displays a dialog box to browse the file system for an image to be included in the note.
	■ **Bullet Points**: Enables the use of numeric or bulleted lists in the note.
	■ **Table**: Enables the use of tables in the note for organizing data.

A.9.6.6.1 Rich Text Editor Toolbar The Rich Text Editor lets you quickly and easily select text formatting options.

The following table describes the elements available on the toolbar.

Icon	Description
	Deletes the selected text and copies it to memory for insertion at another point in the note.
	Copies the selected text to memory for use at another point in the note.
	Inserts text that was either cut or copied into memory at the cursor position in the note.
	Click the font name to choose from a list of available fonts for the selected text. Click the number to select the point size of the text.
	Displays the Color Palette from which to choose the color of the selected text.
	Makes the selected text appear bold.
	Displays the selected text in italics.
	Underlines the selected text.
	Justifies the text to the left of the note.
	Center the text in the note.
	Justifies the text to the right of the note.
	Spaces the text so that text is justified to both the left and right sides of the note.

A.9.6.7 Sticky Note Annotation Toolbar

The Sticky Note Annotation Toolbar lets you open the color palette and the Rich Text Editor, allowing you to edit and format the rich text content of the annotation. Sticky Note annotations are placed after clicking one time on the document surface.

The following table describes the elements available on the toolbar.

Icon	Description
	Click to display the Color Palette from which to choose the color of the selected note.
	Click to display the Rich Text Editor.
	Click and drag to move the note to another location on the document.

A.9.6.8 Redaction Annotation

Redaction annotations behave like highlight annotations, except that they are completely opaque and cannot be brightened or darkened. They are used to cover up sensitive information in a document or another annotation. They are added by selecting the redaction tool, then clicking and dragging over the document in the Viewer to create an opaque redaction annotation. Doing so displays the Redaction Annotation Toolbar. If you have rights to modify a redaction annotation, it becomes transparent when you select it in the advanced viewer mode. If you do not have rights to modify the annotation, you cannot select it. The security level for redaction annotations cannot be designated as hidden.

Icon	Description
	Click and drag to move the redaction annotation to another location on the document.
	Click and drag to resize the redaction annotation.

A.9.6.9 Stamp Annotation

Stamp annotations allow you to overlay and save predefined watermarks on a viewed document page. They are added by selecting the stamp tool, then clicking on the document in the Viewer to apply the selected watermark. The Stamp Annotation Toolbar displays which you use to manipulate the watermark.

The following table describes the elements available on the toolbar.

Icon	Description
	Click to select which watermark to use. There are four stamp options: ■ Approved ■ On Hold ■ Received ■ Rejected
	Slide pointer left and right to lighten and darken the opacity of the watermark.
	Click to rotate watermark 45 degrees clockwise. Repeat as many times as necessary to orient the watermark in 45 degree increments.
	Click to cycle through three different size options for the watermark.

Icon	Description
✛	Click and drag to move the watermark to another location on the document.

A.10 Download Document Page

The Document Page is displayed by clicking Download on the Search Results Toolbar or selecting Download from either the Search Results Contextual Menu or the Viewer Menus. It is used to save a copy of the document to a local or shared network drive.

The following table describes the elements available on the page.

Element	Description
Download Original	Saves the original document that was uploaded or indexed into the system to a local or networked drive. If the document has annotations the user does not have rights to modify, an error will be shown and the download will be canceled.
Download TIFF	Saves a TIFF file representation of the original document to a local or networked drive. Annotations will be burned into the TIFF image according to user permissions. If the document has annotations that the user does not have rights to see, the document is downloaded without the hidden annotations.
Lock Document	If you had the document locked, check the box to keep documented locked after updating If the document is not locked, check the box to lock the document after updating it. If the document is locked by someone else, this option is disabled.

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