November 2011

Documentation for business application users that describes how to use an Imaging or Managed Attachments solution provided by the Oracle WebCenter application adapters.
Contents

Preface .................................................................................................................................................................. v
  Audience ....................................................................................................................................................... v
  Documentation Accessibility ......................................................................................................................... v
  Related Documents ................................................................................................................................... v
  Conventions ................................................................................................................................................. v

1 Solutions Overview
  1.1 Imaging Solution Overview ................................................................................................................. 1-1
    1.1.1 Imaging Scenario 1: Processing Invoices ....................................................................................... 1-1
    1.1.1.1 Keying Entries From Images ........................................................................................................ 1-2
    1.1.2 Imaging Scenario 2: Capturing Employee Supporting Documents ............................................... 1-2
    1.1.3 Imaging Scenario 3: Viewing Supporting Employee Documents .................................................. 1-3
  1.2 Managed Attachments Solution Overview ............................................................................................ 1-3
    1.2.1 Attachments Scenario 1: Capturing Employee Identity Documents ............................................. 1-3
    1.2.2 Attachments Scenario 2: Viewing and Editing Employee Identity Documents ................................ 1-4

2 Using the Imaging Solution
  2.1 Displaying the Imaging Solution From the Business Application ......................................................... 2-1
  2.2 Working with the Task List ..................................................................................................................... 2-2
    2.2.1 Viewing and Selecting Tasks ............................................................................................................ 2-2
    2.2.2 Automatically Selecting Tasks ......................................................................................................... 2-3
    2.2.3 Releasing Tasks .............................................................................................................................. 2-3
    2.2.4 Customizing the Task List Display .................................................................................................. 2-3
      2.2.4.1 Hiding or Displaying Columns .................................................................................................. 2-3
      2.2.4.2 Reordering and Resizing Columns ........................................................................................... 2-3
      2.2.4.3 Detaching the Display .............................................................................................................. 2-4
    2.2.5 Sorting Tasks ..................................................................................................................................... 2-4
    2.2.6 Searching for Tasks ........................................................................................................................... 2-4
  2.3 Performing Tasks .................................................................................................................................... 2-5
    2.3.1 Viewing Document Images ............................................................................................................. 2-5
    2.3.2 Customizing the Task Viewer Display ............................................................................................. 2-5
    2.3.3 Selecting Users or Groups ............................................................................................................... 2-6
    2.3.4 Selecting Items ................................................................................................................................ 2-6
    2.3.5 Viewing and Entering Comments .................................................................................................... 2-7
# Using the Managed Attachments Solution

3.1 Viewing Attachments
- Displaying Managed Attachments in the Business Application
- Viewing Attached Documents
- Viewing Documents in AutoVue
- Configuring Fields For Display
- Viewing a Document's Information

3.2 Attaching and Detaching Documents
- Checking In and Attaching a Document
- Checking Out Documents and Undoing Check-outs
- Scanning Using Oracle Distributed Document Capture
- Attaching From the Content Server Repository
- Detaching a Document

3.3 Editing Attachments
- Opening or Saving a Document
- Editing a Document in Its Native Application
- Updating a Document’s Metadata
- Working With Document Revisions
- Deleting a Document on Content Server

3.4 Finding Attachments
- Searching for Documents on the Content Server Repository
- Searching Within the Attachments List

# Imaging Solution Screens

A.1 Task List Screen
A.2 Task Viewer Screen
A.3 Select Item Screen
A.4 Select User/Group Screen

# Managed Attachments Screens

B.1 Managed Attachments Screen
B.2 Content Check-In Form
B.3 Configure Fields for Display Screen
B.4 Content Information Screen
B.5 Info Update Form
B.6 Scan Document Screen
B.7 Expanded Search Form
B.8 Search Results Screen
Preface

This document describes how to use the features provided by Oracle WebCenter application adapter solutions with selected business applications.

Audience

This document provides instructions for end-users whose business application has been extended using an Oracle WebCenter application adapter solution.

Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Related Documents

For administrator adapter information, see the Oracle WebCenter Administrator’s Guide for Application Adapters.

Conventions

The following text conventions are used in this document:

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.</td>
</tr>
<tr>
<td><em>italic</em></td>
<td>Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.</td>
</tr>
<tr>
<td>monospace</td>
<td>Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.</td>
</tr>
</tbody>
</table>
This chapter describes business application solutions configured using the application adapters for Oracle WebCenter. Solutions include the Imaging Solution, which provides imaging, capture, and workflow capabilities using Oracle WebCenter Content: Imaging, and the Managed Attachments Solution, which enables business users to attach, scan, and retrieve documents stored in an Oracle WebCenter Content Server (Content Server) repository.

This chapter covers the following topics:

- Section 1.1, "Imaging Solution Overview"
- Section 1.2, "Managed Attachments Solution Overview"

1.1 Imaging Solution Overview

The Imaging Solution provides imaging, capture, and workflow capabilities using Oracle WebCenter Content: Imaging. Depending on configuration, use the Imaging Solution for tasks such as the following:

- Launch Imaging from your business application, and select and perform workflow tasks. When you view a selected task, you acquire it for your use and it is no longer available to other users.
- View attached images and metadata values. Use Imaging’s tools for viewing, annotating, and redacting images, as your permissions allow.
- Key entries in your business application while viewing images and related values in the Imaging viewer. See Section 1.1.1.1, "Keying Entries From Images."
- Perform actions related to the workflow task, such as routing, canceling, updating, and completing tasks.
- Scan or upload supporting documents for a selected business application record.
- View supporting images for a business application record without leaving the business application.

1.1.1 Imaging Scenario 1: Processing Invoices

An Imaging Solution configured for invoice processing might work as follows:

1. A workflow process automatically generates user tasks.

   An invoice is uploaded, metadata values are assigned, and a task for processing the invoice is generated. Typically, tasks are pooled into profiles from which groups of users select. You may have access to tasks in multiple profiles.
2. From your business application, you launch the invoices Imaging Solution, by selecting a command or clicking a link or button called **Process Invoices**.

3. You select a task from those listed for a selected profile. Once you select (acquire) a task, it is no longer available to other users.

4. In the Task Viewer, you view the task's invoice image, key entries in your business application based on the image, and perform related commands.
   
   Additional action commands are typically provided in a side panel. You might route the task to another user or group for approval, add comments for others to view, skip the task, or re-scan or delete the task's document.

5. You complete the task and begin another, if desired.

Most often, changes you make in your business application are synchronized with Imaging, and vice versa.

### 1.1.1.1 Keying Entries From Images

When configured, the Imaging Solution enables you to easily key entries in your business application while viewing a related image on another monitor. For example, you might follow this sequence to process invoices:

1. From your business application's invoice entry screen, start the invoice Imaging Solution.
2. Select a task. In the Task Viewer screen, view the invoice image and its associated metadata values.
3. In the invoice entry screen, key in entries such as invoice amount and date.
4. Save the invoice entry in your business application.
5. Complete the task.
   
   - Values are synchronized between Imaging and your business application. For example, suppose the amount was incorrectly listed in the Imaging summary values. If you entered a different amount in the invoice entry screen (based on the invoice image), the Imaging metadata value is updated.
   
   - If configured, the invoice image is stored as an attachment to the corresponding business application record.

6. You repeat steps 2 through 5 to create additional invoice records, keying from their displayed images.

### 1.1.2 Imaging Scenario 2: Capturing Employee Supporting Documents

An Imaging Solution configured for capturing supporting documents might work as follows:

1. From your business application, you retrieve a record such as an employee record.
2. You launch the document Imaging Solution, by selecting a command or clicking a link or button called **Scan Employee Document**.
3. Oracle Distributed Document Capture launches and automatically initiates a scan (if a scanner is attached to the desktop) or enables you to upload electronic images from your desktop.
4. You enter index values (metadata) in Oracle Distributed Document Capture to store with the images.
5. You click Send, which transmits the captured document images and their metadata from Oracle Distributed Document Capture to Imaging.

1.1.3 Imaging Scenario 3: Viewing Supporting Employee Documents
An Imaging Solution configured for viewing supporting documents might work as follows:
1. From your business application, you retrieve a record such as an employee record.
2. You launch the document Imaging Solution, by selecting a command or clicking a link or button called View Employee Documents.
3. From the list of documents associated with the employee record and their metadata values, you select a document.
4. The document is displayed in the Imaging viewer, where you can view its images, and with appropriate permissions, apply annotations or redactions.

1.2 Managed Attachments Solution Overview
The Managed Attachments Solution enables business users to attach, scan, store, and retrieve attachments stored in an Oracle WebCenter Content Server repository. A Content Server repository enables users throughout an enterprise to view, collaborate on, and retire content, ensuring that content is secure, accurate, and up-to-date.
Depending on configuration, use the Managed Attachments Solution for tasks such as the following:
- Check in new documents to Content Server and attach them to the selected business application entity
- Scan and import documents using Oracle Distributed Document Capture, attaching them to the selected business application
- Open documents in their native application, Web-viewable format, or AutoVue viewer (if configured)
- Detach documents from the selected business application entity
- Search Content Server and attach documents to the selected business application entity from the Content Server repository; drill down by searching within search results
- Check out documents, locking them from changes by other users
- Modify a document’s metadata values
- If configured, view a previous attached revision and update the attachment revision
- View an attached document’s information

1.2.1 Attachments Scenario 1: Capturing Employee Identity Documents
A Managed Attachments Solution configured for capturing employee documents such as passports might work as follows:
1. From your business application, you retrieve a record such as an employee record.
2. You launch the Managed Attachments Solution, by selecting a command or clicking a link or button called Scan Employee Document.
3. Oracle Distributed Document Capture launches and automatically initiates a scan (if a scanner is attached to the desktop) or enables you to upload electronic images from your desktop.

4. You select attachment settings, click **Scan Document**, then enter index values (metadata) in Oracle Distributed Document Capture to store with the images.

5. You click **Send**, which transmits the captured document images and their metadata from Oracle Distributed Document Capture to Content Server.

6. You click the **Refresh** button to see the newly scanned or imported document listed as attached to the selected employee record.

### 1.2.2 Attachments Scenario 2: Viewing and Editing Employee Identity Documents

A Managed Attachments Solution configured for viewing employee identity documents might work as follows:

1. From your business application, you retrieve an employee record.

2. You launch the attachments solution, by selecting a command or clicking a link or button called **View Employee Documents**.

3. The Managed Attachments screen displays, listing attachments for the employee record.

4. An attachment may show its revision number, and if it was checked out by you or another user. If revision-specific mode has been configured and an older revision is attached, you can either view the older attached revision or view the newer revision and make it the new attached version.

5. You select an attached document’s **Edit** icon. As you make updates to the document, it is checked out to you and cannot be edited by others. When you check in the revised document, its revision number is incremented.

6. The document is displayed in Content Server or the AutoVue viewer, where you can view its images, and with appropriate permissions, apply annotations or redactions.
This chapter describes how to use the Imaging Solution. It covers displaying the solution from the business application, working with tasks in the Task List and Task Viewer, and selecting users, groups, and items.

This chapter covers the following topics:

- Section 2.1, "Displaying the Imaging Solution From the Business Application"
- Section 2.2, "Working with the Task List"
- Section 2.3, "Performing Tasks"

## 2.1 Displaying the Imaging Solution From the Business Application

Follow these steps to display the Imaging Solution from the business application such as Oracle E-Business Suite or Oracle PeopleSoft.

---

**Note:** Ensure the following browser settings are configured:

- Pop-up blockers are disabled for the hostnames used in this solution
- Cookies are not blocked

---

1. On a business application screen that supports the imaging solution, display a record. If needed, save the record. For example, create and save an invoice.

2. Activate the imaging solution. Depending on configuration, you might:

   - Click a button or link (for example, *Invoice Processing*).
   - Click a *Zoom* icon from the toolbar (Oracle E-Business Suite Forms applications only), as shown below, then a command from the Zooms menu (for example, *Invoice Processing*), and click *OK*.

For a document Imaging Solution, you might select a command called *Scan Employee Document* or *View Employee Documents*.

---

**Note:** Depending on configuration, you may be prompted to enter a username and password to log in to the solution.
Depending on the solution command you selected, imaging-related options are displayed. For example:

- If you selected a **Process Invoices** command for a *workflow* Imaging Solution, the Task List Screen is displayed. If needed, select a profile in the Profile field. Tasks are associated with a *profile*, and users assigned a profile can access any of its tasks not currently selected by other users. After you select a profile, a list of tasks is displayed. See Section 2.2.1, “Viewing and Selecting Tasks.”

- If you selected a **Scan Employee Document** command for a *supporting document* Imaging Solution, an application called Oracle Distributed Document Capture launches, enabling you to either scan from a desktop scanner or upload electronic images for the business application employee record.

- If you selected a **View Employee Documents** command for a *supporting document* Imaging Solution, a list of documents associated with the selected employee record displays, enabling you to view selected documents.

2.2 Working with the Task List

This section includes the following topics:

- Section 2.2.1, “Viewing and Selecting Tasks”
- Section 2.2.2, “Automatically Selecting Tasks”
- Section 2.2.3, “Releasing Tasks”
- Section 2.2.4, “Customizing the Task List Display”
- Section 2.2.5, “Sorting Tasks”
- Section 2.2.6, “Searching for Tasks”

2.2.1 Viewing and Selecting Tasks

Follow these steps to view a list of available tasks and begin performing them.

When you click **View Task**, the selected task is acquired for your use and is no longer available to other users also assigned the selected profile. It remains acquired until you complete or release the task, even if you close the browser and the session times out. The next time you view the task list, it remains listed as one of your tasks. To release (unacquire) a task, see Section 2.2.3.

1. Start the Imaging Solution as described in Section 2.1.

2. If needed, select a profile in the **Profile** field.

   Tasks are associated with a *profile*, where users assigned the profile can access its tasks. After you select a profile, its tasks are listed.

3. Select a task from the task list.

   - To perform tasks without selecting them manually, click **Auto Task**. In this mode, tasks are automatically assigned and displayed in the Task Viewer Screen.

   - To manually select a task, click its **View Task** link in the Action column. The task is displayed in the Task Viewer Screen.

   A side panel may list additional task list actions you can perform.
2.2.2 Automatically Selecting Tasks

Follow these steps to use auto task mode, in which tasks are automatically displayed for you in the Task Viewer Screen, instead of you selecting them individually from the Task List Screen.

1. Display the Task List Screen.
2. Click Auto Task.

   The Task Viewer Screen is displayed with your first task. After you complete a task, the next task is automatically displayed in the viewer.
3. To exit auto task mode, click the link for returning to the task list from the side panel.

2.2.3 Releasing Tasks

When you click View Task, the selected task becomes acquired by you, until you either complete or release it. If you close your browser without completing a task, the task remains listed in your task list when you next view the list.

Follow these steps to release a task and make it available to all users assigned its associated profile. Note that clicking a Return to Tasklist action command also releases the selected task.

1. Display the Task List Screen.
2. Select a task to release.
3. Click Release.

2.2.4 Customizing the Task List Display

You can adjust the task list in the following ways:

- Section 2.2.4.1, "Hiding or Displaying Columns"
- Section 2.2.4.2, "Reordering and Resizing Columns"
- Section 2.2.4.3, "Detaching the Display"

2.2.4.1 Hiding or Displaying Columns

Follow these steps to hide or display columns in the Task List Screen.

1. Display the Task List Screen. If needed, choose a profile in the Profile field.
2. Click the View menu, select Columns, and select a column to hide or display it.

   Selecting a column hides it if displayed, and displays it if hidden. A check mark is displayed next to columns selected for display.

   Select Show All to display all columns.

2.2.4.2 Reordering and Resizing Columns

For ease of use, you can change the order in which columns are displayed and their width. Follow these steps to reorder and resize columns.

1. Display the Task List Screen. If needed, choose a profile in the Profile field.
2. To resize a column, hover the cursor over its heading until a double arrow is displayed, then click and drag to increase or decrease its width.
3. Reorder columns using either of these methods:
2.2.4.3 Detaching the Display

Follow these steps to display an expanded view of the task list in a detached, movable screen.

1. Display the Task List Screen. If needed, choose a profile in the Profile field.
2. Click Detach. The list of tasks is displayed in its own screen within the application screen. The Detached button appears pressed.
3. To return the list of tasks to its attached position, click Detach again.

2.2.5 Sorting Tasks

If the Task List contains many tasks, sorting them can be useful. For example, you might sort them by status or by a key identifier such as supplier. Note the following guidelines regarding sorting tasks:

- You can sort by one column only.
- The sorting order you choose remains after closing a task and returning to the Task List.
- Sorting does not apply in autotask mode. See Section 2.2.2, "Automatically Selecting Tasks."

Follow these steps to sort tasks in the Task List screen.

1. Display the Task List Screen. If needed, choose a profile in the Profile field.
2. Hover your cursor over the heading of the column by which to sort.
   Two triangle icons are displayed: one for sorting ascending and the other inverted one for sorting descending.
3. Click a sort option and the task list is sorted.

2.2.6 Searching for Tasks

If viewing many tasks in the Task List, you may want to search for a specific task by a key identifier. For example, you might search for an invoice task by its invoice number. Note the following guidelines regarding searching for tasks:

- You can search by Task Number, Title, Task ID, and text attribute fields. You cannot search in auto task mode.
- For some columns, you must enter the full value. For example, if searching by task number, you must enter the exact number. You can specify partial entries for other columns, such as Title or text attribute fields such as an Invoice Number column.
- Task searching is case insensitive.

Follow these steps to search for tasks in the Task List screen.

1. Display the Task List Screen. If needed, choose a profile in the Profile field.
2. In the Search entry field, enter the characters for which to search.
3. Click the **Search** button adjacent to the search entry field. To clear the search, click the **Refresh** button or choose the profile again in the **Profile** field.

### 2.3 Performing Tasks

This section includes the following topics:

- Section 2.3.1, "Viewing Document Images"
- Section 2.3.2, "Customizing the Task Viewer Display"
- Section 2.3.3, "Selecting Users or Groups"
- Section 2.3.4, "Selecting Items"
- Section 2.3.5, "Viewing and Entering Comments"

#### 2.3.1 Viewing Document Images

Follow these steps to view a document associated with a selected task in the Imaging viewer.

1. Display the Task Viewer Screen, either by selecting a task or choosing **Auto Task** in the Task List Screen.

   The task's document is displayed in the Imaging viewer in the large panel of the Task Viewer Screen.

   **Note:** The first time you access the viewer per session, you may be prompted to log in to Imaging. Enter a user name and password and click **Sign In**.

2. Use the Imaging viewer toolbar buttons to perform tasks such as rotating images, zooming in or out, or moving between pages of the document.

   For more information, see the *Oracle WebCenter Content User’s Guide for Imaging*.

3. If needed, switch between the basic and advanced viewer modes. You must use the advanced viewer mode for annotations.

#### 2.3.2 Customizing the Task Viewer Display

In addition to the Imaging image viewer, the Task Viewer screen typically displays Task Actions, Summary, and Comments side panels that relate to the selected task.

- The **Imaging Viewer** panel shows the document's image, along with related options. See Section 2.3.1, "Viewing Document Images."
- The **Task Actions** panel lists action commands related to the task, such as routing, updating, or completing actions.
- The **Summary** panel lists key metadata values assigned to the document, for quick reference. For example, in an Invoice Processing scenario, invoice number and supplier name might be listed.
- The **Comments** panel lists comments entered for the task by users. See Section 2.3.5, "Viewing and Entering Comments."
- A **dynamic data table** may also be displayed. For example, a table showing General Ledger lines might display for an invoice processing solution.
You can customize the task viewer as follows:

- To hide a panel, click its minus (-) sign box. The panel collapses and the sign changes to a plus (+). To show a panel, click its plus (+) sign.
- You can use the basic or advanced viewer mode. You must use the advanced viewer mode to add annotations, as your permissions allow.

---

**Tip:** Click the Preferences link at the top of the screen to set the basic or advanced viewer mode to display by default.

---

### 2.3.3 Selecting Users or Groups

When performing tasks, you might identify a user or group of users. For example, in an invoice processing solution, you might search for users to request an invoice's approval. Follow these steps to search for a user or group of users and select them. Depending on configuration, you search for either users or groups.

1. Display the Select User/Group Screen.
   - This screen is displayed whenever you choose an action command requiring a user or group selection.

2. In the Search field, specify the criteria by which you are searching, such as by user name or group name.

3. In the entry field, specify the value for which you are searching.
   - For example, if searching by user name, enter a portion or all of the user's name. You can enter an asterisk (*) as a wildcard character to match one or more characters. For example, type Acc* to search for a group called Accounting.

4. Click Search to perform the search.

---

**Note:** On a large system, the search could take a while. The more specific your search criteria, the faster results are displayed.

---

5. From the search results displayed in the Available Values field, select one or more users or groups and click Move to move them to the Selected Values field. If needed, click Remove or Remove All to remove users or groups.

6. Click OK.

### 2.3.4 Selecting Items

When performing tasks, you might select an item from a list of choices. For example, in an invoice processing solution, you might select a processing group from several choices. Follow these steps to select an item.

1. Display the Select Item Screen.
   - This screen is displayed whenever you select an action command requiring an item selection.

2. From the field listing choices, select an item and click OK. Click Cancel to exit the screen without a selection.
2.3.5 Viewing and Entering Comments

The Task Viewer Screen typically includes a Comments section that lists the first portion of comments entered by users about the selected task. Follow these steps to view complete comments or add them.

1. In the Comments panel in the Task Viewer Screen, click the glasses icon shown below to view all comments.

   ![Glasses Icon](image1)

   A View Comments popup is displayed, listing comments in the order in which they were added, along with the date and user who entered the comment. Click OK to close the popup.

2. To add a comment, click the Add Comment icon shown below. Enter a comment in the Comment Text field of the popup and click OK. The new comment is displayed at the bottom of the comments list.

   ![Add Comment Icon](image2)
Using the Managed Attachments Solution

This chapter describes how to use the Managed Attachments solution. It covers displaying the attachments list from the business application, viewing, attaching, editing, and searching for attachments, checking in and scanning documents, and working with document revisions.

This chapter includes the following main sections:

- Section 3.1, "Viewing Attachments"
- Section 3.2, "Attaching and Detaching Documents"
- Section 3.3, "Editing Attachments"
- Section 3.4, "Finding Attachments"

For more information about Content Server procedures, see the Oracle WebCenter Content User’s Guide for Content Server.

---

Note: Depending on customization, some functionality described in this section may not be available. For example, some buttons may not be displayed or some icons may be dimmed (grayed out).

3.1 Viewing Attachments

This section includes the following topics:

- Section 3.1.1, "Displaying Managed Attachments in the Business Application"
- Section 3.1.2, "Viewing Attached Documents"
- Section 3.1.3, "Viewing Documents in AutoVue"
- Section 3.1.4, "Configuring Fields For Display"
- Section 3.1.5, "Viewing a Document’s Information"

3.1.1 Displaying Managed Attachments in the Business Application

Follow these steps to display the Managed Attachments screen from an Oracle E-Business Suite, Oracle PeopleSoft, or other business application record.
1. On a business application screen that supports managed attachments, display a record.

2. Activate Managed Attachments. Depending on configuration, you might:
   - Click a **Managed Attachments** button or link.
   - Click a **Zoom** icon from the toolbar (Oracle E-Business Suite Forms applications only), choose **Managed Attachments** from the Zooms menu and click **OK**.

   ![Zooms window](image)

   **Note:** You may be prompted to enter a username and password to log in to Content Server, depending on configuration. If prompted, enter the same username that you use to log in to the business application.

The Managed Attachments screen is displayed, listing any current attachments for the selected business record.

**Note:** You have access to the Managed Attachments screen for a certain amount of time. After a period of inactivity or total access time is reached, a message is displayed, informing you that your access privileges may have expired. To access the Managed Attachments screen, follow the steps in this section to redisplay the Managed Attachments screen.

- Metadata fields and values for the selected business application record may be displayed in the screen surrounded by square bracket [ ] characters. For
example, a managed attachments list for an employee record might display the employee name, or employee ID, or both.

- If the list of attachments is long, page controls and arrows for displaying previous and next pages are displayed.
- You can resize the columns by hovering the cursor over the line between column headings; when it changes to a two-headed arrow, click and drag to increase or decrease the column’s size. Column contents wrap to the next line.
- To sort the attachments list, click a column heading. A triangle is displayed after sorting to indicate ascending (right side up) or descending (inverted) order.

### 3.1.2 Viewing Attached Documents

The Managed Attachments screen provides multiple ways of accessing and viewing documents:

- Click the attachment’s link in the **Name** field to open the document in a Web-viewable format or save the document in its native format to a selected location. For more information, see Section 3.3.1, "Opening or Saving a Document."
- Click the attachment’s **Edit** icon under Actions options to make and save changes to the document. See Section 3.3.2, "Editing a Document in Its Native Application."
- Click the **Info** icon to view the attachment’s content information, and view the Web-viewable or native version of the document. See Section 3.1.5, "Viewing a Document’s Information."
- Click the **AutoVue** icon (if displayed) to view the document in the AutoVue applet, which provides enhancing options such as annotation and markup. See Section 3.1.3, "Viewing Documents in AutoVue."

### 3.1.3 Viewing Documents in AutoVue

Depending on configuration, you may have access to enhanced viewing options in the Managed Attachments screen through AutoVue. If configured, AutoVue enables you to view, print, collaborate, annotate, and mark up non-private (shared) attachments of virtually any document type. For details on shared versus private documents, see Section 3.2.1, "Checking In and Attaching a Document."

1. In the Managed Attachments screen, click the **View in AutoVue** icon shown below for an attachment. When AutoVue is configured, this icon is displayed in the Actions options.

An AutoVue applet is launched, and the selected document displays in the AutoVue client.

---

**Notes:** The AutoVue icon is dimmed (grayed out) for private attachments, which cannot be viewed using AutoVue.

Viewing or annotating a document in AutoVue does not check it out or prevent it from being edited by others. Annotations are contained in a separate layer from their corresponding document.
2. Use AutoVue options to view, annotate, mark up, and print the document. Note
that digital markups are saved in the Content Server repository and associated
with the attached document.

For details about AutoVue use, see the Oracle VueLink 20.2 for Oracle UCM User’s
Manual (or higher).

3.1.4 Configuring Fields For Display

Follow these steps to select and order fields for display in the Managed Attachments
screen.

1. In the Managed Attachments screen, click the Configure icon, as shown below.

2. On the Configure Fields for Display screen, specify fields to display by selecting
them in the Available Fields area (holding down the Ctrl key to select multiple
fields) and clicking the right arrow button to move them to the Main Information
area. Fields selected for display are displayed in dimmed text in the Available
Fields area.

3. Change the order in which fields are displayed by repositioning them in the Main
Information area. Move a field by selecting it and clicking the up or down arrow
button.

**Note:** If needed, click the Reset button to restore the default field
display and order.

4. Click the Apply button and view the results of your changes.

5. When done, click the Save and Exit button, and close the Configure Fields for
Display screen.

3.1.5 Viewing a Document’s Information

Follow these steps to view an attached document’s metadata values or previous
revisions.

1. In the Managed Attachments screen, click the Info icon displayed in the Info
column for a selected attachment.

2. View details about the document on the Content Information Screen.

3.2 Attaching and Detaching Documents

This section includes the following topics:

- Section 3.2.1, "Checking In and Attaching a Document"
- Section 3.2.2, "Checking Out Documents and Undoing Check-outs"
- Section 3.2.3, "Scanning Using Oracle Distributed Document Capture"
- Section 3.2.4, "Attaching From the Content Server Repository"
- Section 3.2.5, "Detaching a Document"
3.2.1 Checking In and Attaching a Document

Follow these steps to check in a document and attach it to the selected business application record.

1. In the Managed Attachments screen, click the **New** button.
2. Complete the fields on the Content Check-in Form.
   - In the **Type** field, select a type for the document.
   - In the **Title** field, enter a name for the attached document.
   - Select the **Share Document** field to make the document a _shared attachment_. Leave the field deselected to make the document a _private attachment_.
     - Documents that are _shared attachments_ are viewable from Managed Attachments _and_ from the standard Content Server application (with the appropriate security access).
     - Documents that are _private attachments_ (not shared) are viewable from Managed Attachments via the business application only. They are hidden in the standard Content Server application.
   - If you selected the **Share Document** field, select a group for the document in the **Security Group** field. The attachment is available to users with permission to this group.
   - Specify the file to attach in the **Primary File** field by clicking the Browse button and selecting a file.
3. Click the **Check In** button.
   
   Content Server options are displayed and a message confirms that the document was checked in. A button called **Check In Similar** enables you to check in and attach another document using the same metadata values.

4. Close the Check-In Confirmation screen.
5. In the Managed Attachments screen, click **Refresh** to display the newly checked in attachment.

3.2.2 Checking Out Documents and Undoing Check-outs

Checking out a document in Content Server makes it temporarily unavailable for other users to save changes to it, until you check it back in, or you or another user undo the check-out.
1. Check out a document by choosing **Checkout** from the Content Actions menu on the Content Information screen. Editing a document using the Edit icon also checks out a document.

**Documents Checked Out By You**
A green check mark icon is displayed in the Revision column (if shown) when a document is checked out by you.

1. To undo a check-out by you or check in a revised document, click the **Checked Out By Me** icon to display the Content Information screen. From its Content Actions menu, choose **Undo Check-out** or **Check-in**.

**Documents Checked Out By Another User**
A lock icon is displayed in the Revision column (if shown) when a document is checked out by another user.

1. To undo the check-out, click the **Lock** icon to display the Content Information screen, and choose **Undo Check-out** from its Content Actions menu.

### 3.2.3 Scanning Using Oracle Distributed Document Capture

The Managed Attachments screen provides a Scan button that, when configured, launches the Oracle Distributed Document Capture application and enables you to either scan a document using a TWAIN compliant scanner or import a scanned image file from disk. After reviewing, editing, and indexing the document, click the **Send** button, which transfers it from Oracle Distributed Document Capture to Content Server and attaches it to the selected business application entity.

Follow these steps to scan or import a document.

1. If scanning documents, place the documents in the feeder tray of the scanner.

   **Note:** You can attach one document only at a time by scanning or importing.

2. In the Managed Attachments screen, click the **Scan** button. The Scan Document screen is displayed.

3. Select a classification in the **Document Classification** field.
   
   This identifies the type of document to be scanned or imported. For example, you might choose a document classification of *Identity Documents* to scan a photocopy of a driver’s license or passport.

4. Select the **Share Document** field to make the document available to other Content Server users with appropriate access. Leave the field deselected (default) to make the document available when viewed through the business application but hidden from the standard Content Server user interface.

5. In the **Security Group** field, select a group for the document. The attachment is available only to users who have permission to the group you select. This field is available only if you chose to share the document in the previous step.
6. Click the **Scan Document** button. The Oracle Distributed Document Capture client application launches and displays options based on whether the selected document classification is configured for scanning or importing.

   - **If set for scanning**, the scanner scans the pages you placed in the feeder and displays them in the Review/Index screen, ready for you to review and index them. All pages are scanned and stored in one document in the batch.
   
   - **If set for importing**, a File Import screen is displayed, prompting you to select one or more scanned image files to import. After you select files, their pages are displayed in the Review/Index screen, ready for you to review and index. All files are imported into a single document in a single batch.

![Elevator Maintenance Log]

7. In the Review/Index screen, review, edit, and index the document. For information, see the *User’s Guide for Oracle Distributed Document Capture*. Follow these guidelines:

   - You can add pages to documents, but should not add documents to the batch.
   
   - Index fields are displayed in the lower side pane. Index fields provide values that are stored as metadata with the Content Server document. An asterisk is displayed before the names of required index fields.
   
   - All pages in a document have the same index values. Changing the values on one page changes them for all pages in the document.

**Note:** If you decide to cancel a document scan or import, you must close the Oracle Distributed Document Capture screen and return to the Managed Attachments screen and perform a new scan or import. This ensures that index values are properly set for attachments.

8. When done, click **Send** to transfer the document to Content Server and attach it to the business application record. When asked to confirm sending the batch, click **Yes**.
The client displays batch send results.

9. Close the Batch Send Results and Oracle Distributed Document Capture screens.

10. In the Managed Attachments screen, click the **Refresh** button to display the newly scanned or imported document now attached to the selected business application record. Note that it may take a few minutes for the generated document to be displayed.

### 3.2.4 Attaching From the Content Server Repository

Follow these steps to search for and attach documents from the Content Server repository to the selected business application record.

1. In the Managed Attachments screen, click the **From Repository** button. The Expanded Search Form is displayed.

2. Enter search criteria and click **Search**. For example, for the **Title** field, select **Starts** and enter the first few characters of a document’s title.

   Search results are displayed, which include documents to which you have security group access.

3. In the **Select** field, select found documents to attach. If a found document is already attached to the business application record, a grayed out box is displayed. You can select multiple documents to attach.

4. From the Actions menu above the Select field, choose **Attach to Current Application Entity**. Confirm attaching the selected document(s) to the business application record. A message confirms that the documents were successfully attached.

5. In the Managed Attachments screen, click the **Refresh** button to display the document(s) now attached to the selected business application record.

### 3.2.5 Detaching a Document

Follow these steps to detach a document from the selected business application record. Detaching a document removes the link to the business application record, but does not delete the document from the Content Server. Also see **Section 3.3.5, "Deleting a Document on Content Server."**

1. In the Managed Attachments screen, select the row corresponding to the attachment to detach from the selected business application record.

2. Click the **Detach** button.

3. A message prompts you to verify detaching the document. Click **OK**.

   A message confirms that the document was successfully detached. After you close the message, the attachment list is automatically refreshed, with the detached document no longer listed.

### 3.3 Editing Attachments

This section includes the following topics:
3.3.1 Opening or Saving a Document

Follow these steps to open a document in a Web-viewable format or save the document in its native format to a selected location such as a local computer. Note that changes you make to a document in this way are not saved on the Content Server; instead, see Section 3.3.2, "Editing a Document in Its Native Application."

1. In the Managed Attachments screen, click a selected document’s link in the Name field. A File Download dialog box is displayed with options to open or save the file.
2. Click Open or Save.

3.3.2 Editing a Document in Its Native Application

Follow these steps to edit a document on the Content Server. Note that you must have access to the native application.

1. In the Managed Attachments screen, click the Edit icon for a selected attachment. The Edit icon is displayed only for documents that can be edited in this way.
2. The document opens in its native application. Note that, depending on configuration, you may be prompted to enter a user name and password to log in. Make changes and save the document.

When you open the document using this method, it is automatically checked out. When you save the document in its native application, it is automatically checked back in as a new revision.

3.3.3 Updating a Document’s Metadata

Follow these steps to make changes to a selected document’s metadata values.

1. In the Managed Attachments screen, click the Info icon for a selected attachment.
2. On the Content Information Screen, choose Update from the Content Actions menu.
3. Make changes to the document’s metadata values on the Info Update Form.
4. Click the Submit Update button.

3.3.4 Working With Document Revisions

The Revision column contains useful information about the attachment revision, including:

- the revision number of the attachment.
- if the attachment is checked out by you (green check mark) or another user (locked icon, hover to view user name).
If Revision-specific mode has been configured and a newer revision than the attached revision exists, the Newer Revision Available icon (page with green up arrow, shown below) is displayed. To make the newest revision the attached revision, click the icon and choose Update Attachment to This Revision from the Content Actions menu in the Content Information Screen.

3.3.5 Deleting a Document on Content Server

Follow these steps to remove a document from the Content Server and also detach it from the business application record. To detach a document only (remove its link to the selected business application record without deleting it from the Content Server), see Section 3.2.5, "Detaching a Document."

1. In the Managed Attachments screen, click the Info icon for a selected attachment.
2. Under Actions options, click the Delete link for the revision to delete. You are prompted to confirm the deletion.

3.4 Finding Attachments

This section includes the following topics:

- Section 3.4.1, "Searching for Documents on the Content Server Repository"
- Section 3.4.2, "Searching Within the Attachments List"

3.4.1 Searching for Documents on the Content Server Repository

Follow these steps to search for documents on the Content Server to view them or attach them to the selected business record.

---

**Note:** Private (not shared) attachments are not returned in search results when searching from within the business application as described in this section.

---

1. In the Managed Attachments screen, click the From Repository button.
2. Specify search criteria on the Expanded Search Form.
   
   For example, to search for a document by its name, select Starts in the Title field and enter the first portion of its name in the adjacent field.
3. Click the Search button. Search results are listed and automatically selected. To display the document, click its Info button.
4. To attach the documents located in the search results, select Attach to current Application Entity from the Actions menu displayed above the Select column.
3.4.2 Searching Within the Attachments List

Follow these steps to perform a search within the attachments list.

1. In the Managed Attachments screen, click the **Search Within** button.

2. Specify search criteria on the Expanded Search Form.

   For example, to search for a document by its name, select **Starts** in the Title field and enter the first portion of its name in the adjacent field.

3. Click the **Search** button. Search within results are listed.
A

Imaging Solution Screens

This appendix describes the Imaging Solution user interface screens, including screens for selecting and editing tasks, and for selecting items, users, and groups.

The Imaging Solution includes the following screens:

- Section A.1, "Task List Screen"
- Section A.2, "Task Viewer Screen"
- Section A.3, "Select Item Screen"
- Section A.4, "Select User/Group Screen"

**Note:** To close the screen’s tab, press Ctrl + Alt + F4.

A.1 Task List Screen

Use this screen to view and select from a list of tasks available to you, based on a selected profile. You can also select related links (if present), and activate auto task mode for automatically selecting tasks.

![Task List Screen](image)

To display this screen, start the Imaging Solution in your business application by clicking the button or link or selecting the menu command that activates the solution. For example, if using an Invoice Processing solution, you might click a **Process Invoices** button.
A.2 Task Viewer Screen

Use this screen to view information about the selected task and perform actions for it.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task List Links</td>
<td>Depending on configuration, a side panel may list task list-related links. (This side panel may not be displayed.) For example, it might include links to external informational sites, shortcuts to commonly used instructions, or internal organization links.</td>
</tr>
<tr>
<td>View</td>
<td>Use this menu to reorder columns, hide or display columns, or detach the task list to a floating screen.</td>
</tr>
<tr>
<td>Profile</td>
<td>If needed, select a profile (category to which tasks are assigned) to view its tasks. You may be assigned multiple profiles.</td>
</tr>
<tr>
<td>Auto Task</td>
<td>After selecting a profile, click this button to activate auto task mode, in which tasks are automatically selected and displayed in the Task Viewer Screen, instead of you selecting them manually from the Task List Screen.</td>
</tr>
<tr>
<td>Release</td>
<td>Click to make a previously selected task available to all users assigned its profile. Note: When you select a task, it becomes acquired by you, until you either complete or release it. If you close your browser without completing a task, the task remains listed in your task list when you next view it.</td>
</tr>
<tr>
<td>Search</td>
<td>Search for a specific task by entering the value to find in the search entry field and clicking the adjacent search button.</td>
</tr>
<tr>
<td>Detach</td>
<td>Click to expand the task list to a floating window you can reposition on the screen. To attach, click Detach again.</td>
</tr>
<tr>
<td>Table</td>
<td>The task list table lists available tasks and their related information. The columns listed depend on configuration. Note that you can hide, display, or reorder columns using View menu options.</td>
</tr>
<tr>
<td>View Task</td>
<td>Click this link to view the selected task in the Task Viewer Screen.</td>
</tr>
</tbody>
</table>
Display this screen from the Task List Screen in one of two ways: by clicking a specific task’s View Task link or by clicking Auto Task.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Commands</td>
<td>This side panel typically lists action commands for the selected task. Common tasks include: Complete Task, Skip Task, and Return to Task List, plus tasks specific to the business use.</td>
</tr>
<tr>
<td>Summary</td>
<td>Displays metadata values stored in Imaging for the document, for reference.</td>
</tr>
<tr>
<td>Comments</td>
<td>Displays the first line of comments users have entered for the selected task. Use this area to view or enter comments.</td>
</tr>
<tr>
<td>Imaging Viewer</td>
<td>Displays the task’s associated images in basic or advanced Imaging viewer mode. For more information on the Imaging viewer, see the Oracle WebCenter Content User’s Guide for Imaging.</td>
</tr>
</tbody>
</table>

**A.3 Select Item Screen**

Use this screen to select an item from a list of choices.
Display this screen by choosing a command requiring a selection. For example, clicking an action command called **Assign Processing Group** on the Task Viewer Screen might display the Select Item screen for assigning the task to a selected processing group.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Selector</td>
<td>From the field listing choices, select an item and click <strong>OK</strong>.</td>
</tr>
<tr>
<td>OK</td>
<td>Exit the screen and use the selection made.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Exit the screen, discarding any selection made.</td>
</tr>
</tbody>
</table>

## A.4 Select User/Group Screen

Use this screen to search for and select a user or group of users.

Display this screen by selecting a command requiring a user or group selection. For example, clicking an action command called **Approval** on the **Task Viewer Screen** might display the Select User/Group screen for selecting a group to request approval for a selected document.
<table>
<thead>
<tr>
<th><strong>Element</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Select the category by which to search for a user or group of users. This field includes choices such as Username, Last Name, First Name, or Group.</td>
</tr>
<tr>
<td>Search Entry</td>
<td>Enter the value to find, based on the selected search category. The application automatically includes wildcard characters at the end to match one or more unknown characters. For example, enter <em>Ols</em> to find users with a last name of Olson.</td>
</tr>
<tr>
<td>Search</td>
<td>Click to search for users or groups that match the category and value you specified.</td>
</tr>
<tr>
<td>Available Values</td>
<td>Displays results from the search you performed by clicking Search. Select users from this list by clicking them and clicking Move or Move All.</td>
</tr>
<tr>
<td>Selected Values</td>
<td>Displays users currently selected for the task.</td>
</tr>
<tr>
<td>Move, Move All</td>
<td>Click to move a selected user or group (Move) or all users or groups (Move All) to the Selected Values field. Hold down the Ctrl key to select multiple users or groups.</td>
</tr>
<tr>
<td>Remove, Remove All</td>
<td>Click to deselect a selected user or group (Remove) or all users and groups (Remove All) from the Selected Values field.</td>
</tr>
<tr>
<td>OK</td>
<td>Continue the task with the selected users or groups shown in the Selected Values field.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Exit this screen without selecting users or groups.</td>
</tr>
</tbody>
</table>
This appendix describes the Managed Attachments user interface screens, including screens for viewing attachments and their information, and checking in, scanning, editing, and searching for attachments.

The Managed Attachments solution includes the following screens:

- Section B.1, "Managed Attachments Screen"
- Section B.2, "Content Check-In Form"
- Section B.3, "Configure Fields for Display Screen"
- Section B.4, "Content Information Screen"
- Section B.5, "Info Update Form"
- Section B.6, "Scan Document Screen"
- Section B.7, "Expanded Search Form"
- Section B.8, "Search Results Screen"

**Note:** For more information about Content Server screens, see the Oracle WebCenter Content User’s Guide for Content Server.

### B.1 Managed Attachments Screen

Use the Managed Attachments screen to view, attach, scan, detach, and edit Content Server documents attached to the selected business application record. You can also use Content Server search options to locate Content Server documents to which you have access.

The Managed Attachments screen lists all Content Server documents attached to the selected business application record, and provides the options listed in the following table.
## Managed Attachments Screen

A Managed Attachments screen displays information about the attached documents and provides options to interact with them.

### Element | Icon or Button | Description
--- | --- | ---
Name |  | Lists the native name (including extension) of each Content Server document attached to the business application record. Click the document’s link to open or save a Web-viewable rendition of the document.
Title |  | Displays the title of the attached Content Server document, assigned at check-in.
Author |  | Identifies the person who last checked in the file.
Size |  | Displays the size (KB/MB) of the attached Content Server document.
Date |  | Displays the date on which the Content Server document was last checked in to Content Server.
Revision | ![Revision Icons](image) | Displays information about the attached revision. Depending on configuration, some items may not be shown.
- **Number**: Indicates the revision number of the attachment.
- **Checked Out by Me** icon (check mark): Indicates that the attachment is checked out by you. Click this icon to display the Content Information Screen, and check in or undo the check-out.
- **Checked Out By** icon (lock): Indicates that the attachment is checked out by another user. Hover the cursor over the icon to view the name of the user who checked out the attachment.
- **Newer Revision Available** icon (page with up arrow): Indicates that a newer revision exists than the one attached. Click this icon to display the Content Information Screen, and if needed, make the more recent revision the attached revision.
Info | ![Info Icon](image) | Click this icon to display detailed information and content actions for the selected document on the Content Information Screen.
View in AutoVue | ![AutoVue Icon](image) | Click this icon to view, print, collaborate, annotate, and mark up non-private (shared) attachments in the AutoVue document viewer, if configured. The AutoVue icon is dimmed (grayed out) for private attachments, which cannot be viewed using AutoVue.
Edit | ![Edit Icon](image) | Click this icon to check out, open, and edit the attached Content Server document in its native application.
B.2 Content Check-In Form

Use the Content Check-In Form to check in documents to Content Server, assign them metadata values, and attach them to the selected business application record.

To display this screen, click the New button in the Managed Attachments Screen.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Select the option that best describes the type of file to be attached. The default document type is displayed. This field is required.</td>
</tr>
<tr>
<td>Title</td>
<td>Enter a descriptive title for the document. This field is required.</td>
</tr>
</tbody>
</table>
The Configure Fields for Display screen enables business application users to specify the attachment information to display in the Managed Attachments screen.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Author</td>
<td>Identifies the person who checked in the file.</td>
</tr>
<tr>
<td>Share Document</td>
<td>Select this field to make the document available to other Content Server users with appropriate access. Leave the field deselected (default) to make the document available when viewed through the business application but hidden from the standard Content Server user interface.</td>
</tr>
<tr>
<td>Security Group</td>
<td>Select a security group for the file. If shared, the file is available to users who have permission to the specified security group. This field is required.</td>
</tr>
<tr>
<td>Primary File</td>
<td>Specify a primary file using one of these methods:</td>
</tr>
<tr>
<td></td>
<td>- Click <strong>Browse</strong> next to the field. Navigate to and select the native file, and then click <strong>Open</strong>.</td>
</tr>
<tr>
<td></td>
<td>- Enter the complete path name and file name of the native file (for example, c:/My Documents/ABC Project/MyFile.doc).</td>
</tr>
<tr>
<td></td>
<td>This field is required.</td>
</tr>
<tr>
<td>Comments</td>
<td>Enter any notes about the file.</td>
</tr>
<tr>
<td>Check In</td>
<td>Click to check in the specified document using the settings selected on this screen.</td>
</tr>
<tr>
<td>Reset</td>
<td>Click to cancel any entries and restore the default settings in this screen.</td>
</tr>
</tbody>
</table>

B.3 Configure Fields for Display Screen

The Configure Fields for Display screen enables business application users to specify the attachment information to display in the Managed Attachments screen.
To display this screen, click the **Configure** button in the Managed Attachments Screen.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available Fields</td>
<td>Lists fields available for display in the Managed Attachments screen. Click the right arrow to move a selected field to the Main Information area. Fields selected for display are shown in dimmed characters.</td>
</tr>
<tr>
<td>Main Information</td>
<td>Lists fields selected for display in the Managed Attachments screen. Fields are displayed left to right in the order in which they are listed in this area. Click the up or down arrow button to reposition a selected field.</td>
</tr>
<tr>
<td>Apply</td>
<td>Click to preview your changes in the Managed Attachments screen. If needed, temporarily reposition the Configure Fields for Display screen to view screen changes.</td>
</tr>
<tr>
<td>Save And Exit</td>
<td>Click to save changes to the display configuration and return to the Managed Attachments screen.</td>
</tr>
<tr>
<td>Reset</td>
<td>Click to cancel any changes and restore the default display settings.</td>
</tr>
</tbody>
</table>

### B.4 Content Information Screen

Use the Content Information screen to view details about the attached file, view its web-viewable or native version, and check out or delete the document.

To display this screen, click the **Info** button shown below for a selected attached document in the Managed Attachments Screen.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Displays the type that best describes the document.</td>
</tr>
<tr>
<td>Title</td>
<td>Displays the title of the attached document, assigned at check-in.</td>
</tr>
<tr>
<td>Author</td>
<td>Identifies the person who last checked in the document.</td>
</tr>
<tr>
<td>Comments</td>
<td>Displays additional notes about the document.</td>
</tr>
<tr>
<td>Security Group</td>
<td>Identifies access permission to the document.</td>
</tr>
<tr>
<td>Checked Out By</td>
<td>Identifies the user who checked out the document.</td>
</tr>
<tr>
<td>Status</td>
<td>Identifies the document’s current status. A status of Released indicates that the revision is available in the Content Server.</td>
</tr>
</tbody>
</table>
B.5 Info Update Form

Use the Update Info Form to make changes to a selected document’s metadata values. Users search for documents on the Content Server by their metadata values.

To display this screen, click the Info icon for a selected attachment in the Managed Attachments Screen, then choose Update from the Content Actions menu on the Content Information Screen.

<table>
<thead>
<tr>
<th><strong>Element</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Formats</td>
<td>Identifies formats for the document.</td>
</tr>
<tr>
<td>Web Location</td>
<td>Click this link to view a web-viewable rendition of the attached document.</td>
</tr>
<tr>
<td>Native File</td>
<td>Click this link to either save a copy of the document or open it in its native application.</td>
</tr>
<tr>
<td>Table</td>
<td>Lists revisions of the document, along with their release date, expiration date, and status. Click the Delete link to remove the corresponding revision.</td>
</tr>
<tr>
<td>Content Actions</td>
<td>Provides options for checking out the document, updating it, checking in a similar one, subscribing to it, or checking out and opening it. If viewing this screen after clicking the Newer Revision Available icon on the Managed Attachments screen, an additional command is available: Choose Update Attachment to This Revision to make the newer revision the attached version.</td>
</tr>
<tr>
<td>E-mail</td>
<td>Click the Send Link by E-mail link to open a new e-mail message that contains a URL to the selected document.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Element</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Select the option that best describes the file.</td>
</tr>
<tr>
<td>Title</td>
<td>Enter a descriptive title for the document.</td>
</tr>
<tr>
<td>Author</td>
<td>Identifies the user who checked in the current document revision.</td>
</tr>
</tbody>
</table>
B.6 Scan Document Screen

Use the Scan Document screen to specify the type of document to scan or import, and then attach to the business application entity.

To display this screen, click the Scan button in the Managed Attachments Screen.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Classification</td>
<td>Identify the type of document to be scanned or imported.</td>
</tr>
<tr>
<td>Share Document</td>
<td>Select this field to make the document available to other Content Server users with appropriate access. Leave the field deselected (default) to make the document available when viewed through the business application but hidden from the standard Content Server user interface.</td>
</tr>
<tr>
<td>Security Group</td>
<td>Select a group for the document.</td>
</tr>
<tr>
<td></td>
<td>■ If you selected <strong>Share Document</strong>, the document becomes available to users who have permission to this group.</td>
</tr>
<tr>
<td></td>
<td>■ If you left <strong>Share Document</strong> deselected, selecting a security group is not needed; this field is grayed out.</td>
</tr>
<tr>
<td>Scan Document</td>
<td>Click to begin scanning or importing the document.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Click to exit without scanning or importing.</td>
</tr>
<tr>
<td>Reset</td>
<td>Click to cancel any selections and restore the default settings in this screen.</td>
</tr>
</tbody>
</table>
B.7 Expanded Search Form

This search screen enables you to search the Content Server for documents to attach to the selected business application record. After specifying search criteria and clicking Search, results are listed in the Search Results Screen.

To display this screen, click the From Repository button in the Managed Attachments Screen. Alternatively, click the Search Within button to search within the results list.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Select an operator and enter a document title.</td>
</tr>
<tr>
<td>Type</td>
<td>Select an operator and select a document type.</td>
</tr>
<tr>
<td>Security Group</td>
<td>Select an operator and search for the document’s security group. To search for private documents, select AFDocuments as the security group.</td>
</tr>
<tr>
<td>Author</td>
<td>Select an operator and search for the person who checked in the file.</td>
</tr>
<tr>
<td>Comments</td>
<td>Specify an operator and search for files by their comments.</td>
</tr>
<tr>
<td>Results Per Page</td>
<td>Determines the number of results that are displayed on the search results page.</td>
</tr>
<tr>
<td>Sort By</td>
<td>Determines which of the following options are used to sort the targeted search results, and whether those results are listed in ascending or descending (default) order: Release Date (default) Title</td>
</tr>
<tr>
<td>Search Forms</td>
<td>Switch between the expanded and query builder search forms.</td>
</tr>
<tr>
<td>Search</td>
<td>Click to perform the search using the selected search criteria.</td>
</tr>
<tr>
<td>Reset</td>
<td>Restores the screen to its default settings.</td>
</tr>
</tbody>
</table>
B.8 Search Results Screen

This screen displays the results of a Content Server repository or Search Within search.

- In the case of a repository search, the Search Results screen allows you to attach one or more documents.
- In the case of a Search Within search, the screen is viewable but you cannot attach documents.

You can also save or restrict your search using standard Content Server query actions.

To display this screen, click the From Repository or Search Within button in the Managed Attachments Screen, specify a search in the Expanded Search Form, and click Search.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>Select one or more documents to attach. A dimmed box is displayed if a document is already attached to the business application record.</td>
</tr>
<tr>
<td>Actions</td>
<td>To attach the selected documents to the business application record, choose Attach to current Application Entity.</td>
</tr>
<tr>
<td>Change View</td>
<td>Select another Content Server results view.</td>
</tr>
</tbody>
</table>
A
acquiring tasks, 2-2
action commands, 1-2, 2-5
adding comments, 2-7
advanced Imaging viewer, 2-6
annotations, 1-1
assigning security group, 3-5, 3-6, B-4
Attach to Current Application Entity command, B-9
attached images, 1-1, 1-2
attaching documents, 3-5, 3-8
attachments
displaying document information, 3-4
solution, 1-1
sorting, 3-3
auto task mode, 2-3, A-2
AutoVue
user guide, 3-4
using, 3-3, B-2

B
basic Imaging viewer, 2-6

C
changing column order in task list, 2-3
checked out by icons, 3-5
checking in documents, 3-5
check-out, 3-5
undoing, 3-5
columns, 2-3
configuring for display, 3-4
hiding in task list, 2-3
reordering in task list, 2-3
comments, 2-5, A-3
adding, 2-7
viewing, 2-7
completing tasks, 1-2
Configure Fields for Display screen, B-4
Content Check In Form, B-3
Content Information screen, B-5
Content Server, 3-5
repository, 3-8

D
deleting documents, 3-10
detaching documents, 3-8
detaching task list, 2-4, A-2
displaying columns in task list, 2-3
document classification, 3-6
documents, 2-5
assigning security group, 3-6
attaching, 3-5
checking in, 3-5
checking out, 3-5
deleting, 3-10
detaching, 3-8
editing, 3-9
indexing, 3-7
revisions, 3-9
scanning, 3-6
searching for, 3-8, 3-10, B-8
security group, 3-5, B-4
sending, 3-7
shared versus private, 3-5, 3-6, B-4
updating metadata, 3-9

E
entering comments, 2-7
entries, keying, 1-1
Expanded Search Form, B-8

F
fields, configuring for display, 3-4

G
groups, 2-6

H
hiding columns in task list, 2-3

I
images, 1-1
attached, 1-2
keying entries from, 1-2
viewing, 2-5
imaging solution
described, 1-1
logging in, 2-1
starting, 2-1
Imaging viewer, 1-1, 2-5, A-3
basic or advanced, 2-5, 2-6
Imaging, logging in, 2-5
importing documents, 3-6
indexing documents, 3-7
Info Update Form, B-6

K
keying entries from images, 1-1, 1-2

L
logging in, 2-1, 2-5

M
Managed Attachments
screen, 3-1, B-1
sorting, 3-3
metadata, updating, 3-9

N
newer revision, 3-9
Newer Revision Available icon, B-2, B-6

O
opening documents, 3-9
Oracle Distributed Document Capture, using, 3-6
Oracle E-Business Suite, 2-1
displaying attachments, 3-1
Oracle PeopleSoft, 2-1
displaying attachments, 3-1
Oracle WebCenter Content Imaging
See Imaging
Oracle WebCenter Content Server
See Content Server

P
page controls, 3-3
private documents, 3-5, 3-6, B-4
profiles, 1-1, 2-2, A-2

R
redaction, 1-1
releasing tasks, 2-2, 2-3, A-2
repository, 3-8
resizing columns in task list, 2-3
revision number, 3-9

S
saving documents, 3-9
Scan Document screen, B-7
scanning, 3-6
Search Results screen, B-9
searching
criteria, A-5
for documents, 3-8, 3-10, B-8
for tasks, A-2
for users or groups, 2-6
security group, assigning, 3-5, 3-6, B-4
Select Item screen, A-3
Select User/Group screen, A-4
selecting
groups, 2-6
items, 2-6
users, 2-6
sending documents, 3-7
shared documents, 3-5, 3-6, B-4
sorting
attachments, 3-3
tasks, 2-4, A-2
starting the imaging solution, 2-1
summary values, 2-5, A-3

T
task actions, 1-2, 2-5
task list
customizing, 2-3
detaching, 2-4
displaying, 2-2
Task List screen, A-1
Task Viewer screen, A-2
tasks, 1-1
releasing, 2-3
searching, A-2
selecting, 2-2
selecting automatically, 2-3
sorting, 2-4, A-2
viewing, 2-2

U
undoing check-out, 3-5
Update Attachment to This Revision command, B-6
updating attachments to revisions, 3-9
users, 2-6

V
view task, A-2
viewer, 1-1
viewing
comments, 2-7
document images, 2-5

W
wildcard search characters, 2-6
workflow tasks, 1-1

Z

Zoom icon, 2-1
Zoom menu, 3-1