

## **Oracle® Fusion Middleware**

User's Guide for Oracle Application Adapters for Oracle  
Enterprise Content Management

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# Preface

The *User's Guide for Oracle Application Adapters for Oracle Enterprise Content Management* describes how to use the features provided by Oracle application adapter solutions with selected business applications.

## Audience

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

## Documentation Accessibility

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## Related Documents

For administrator adapter information, see the *Oracle Fusion Middleware Administrator's Guide for Oracle Application Adapters for Oracle Enterprise Content Management*.

## Conventions

The following text conventions are used in this document:

<b>Convention</b>	<b>Meaning</b>
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	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.

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# Solutions Overview

This guide describes how to use business application solutions provided by the Oracle Application Adapters for Oracle Enterprise Content Management. The adapters include the following solutions for Oracle E-Business Suite and Oracle PeopleSoft:

- **Imaging Solution**, which provides imaging, capture, and workflow capabilities using Oracle Imaging and Process Management (Oracle I/PM). For overview information, see [Section 1.1](#). Details are covered in [Chapter 2, "Using the Imaging Solution."](#)
- **Managed Attachments Solution**, which enables business users to attach, scan, and retrieve document attachments stored in an Oracle Universal Content Management (Oracle UCM) repository. For overview information, see [Section 1.2](#). Details are covered in [Chapter 3, "Using the Managed Attachments Solution."](#)

## 1.1 Imaging Solution Overview

The Imaging Solution provides imaging, capture, and workflow capabilities using Oracle Imaging and Process Management (Oracle I/PM). Depending on configuration, use the Imaging Solution for tasks such as the following:

- Launch Oracle I/PM from your business application, and select and perform workflow tasks. When you select a task, you acquire it for your use and it is no longer available to other users.
- View attached images and metadata values. Use Oracle I/PM'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 Oracle I/PM 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 Oracle I/PM, 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 Oracle I/PM and your business application. For example, suppose the amount was incorrectly listed in the Oracle I/PM summary values. If you entered a different amount in the invoice entry screen (based on the invoice image), the Oracle I/PM 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 Oracle I/PM.

### 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 Oracle I/PM viewer, where you can view its images, and with appropriate permissions, apply annotations or redactions.

## 1.2 Managed Attachments Overview

The Managed Attachments Solution enables business users to attach, scan, store, and retrieve attachments stored in an Oracle UCM Content Server repository. An Oracle UCM 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 Oracle UCM repository
- Check out documents, locking them to 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 Oracle UCM.
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 Oracle UCM (or the AutoVue viewer), where you can view its images, and with appropriate permissions, apply annotations or redactions.

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## Using the Imaging Solution

This section covers the following topics:

- [Section 2.1, "Imaging Solution Procedures"](#)
- [Section 2.2, "Imaging Solution Screens"](#)

### 2.1 Imaging Solution Procedures

This section describes how to perform the following tasks in the Imaging Solution.

#### Starting the Solution

- [Section 2.1.1, "Starting the Imaging Solution in Oracle E-Business Suite"](#)
- [Section 2.1.2, "Starting the Imaging Solution in Oracle PeopleSoft"](#)

#### Working with the Task List

- [Section 2.1.3, "Viewing and Selecting Tasks"](#)
- [Section 2.1.4, "Automatically Selecting Tasks"](#)
- [Section 2.1.5, "Releasing Tasks"](#)
- [Section 2.1.6, "Customizing the Task List Display"](#)

#### Performing Tasks

- [Section 2.1.7, "Viewing Document Images"](#)
- [Section 2.1.8, "Customizing the Task Viewer Display"](#)
- [Section 2.1.9, "Selecting Users or Groups"](#)
- [Section 2.1.10, "Selecting Items"](#)
- [Section 2.1.11, "Viewing and Entering Comments"](#)

#### 2.1.1 Starting the Imaging Solution in Oracle E-Business Suite

Follow these steps to display the Imaging Solution from Oracle E-Business Suite.

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**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. Display a supported Oracle E-Business Suite form.
2. From the toolbar, click the **Zoom** icon shown below. (Depending on configuration, you may instead select a specific menu or press a specific key.)



3. From the **Zooms** menu (or similar menu), select the solution command and click **OK**. For example, if using an invoice processing imaging solution, you might select **Process Invoices**. For a document imaging solution, you might select a command called **Scan Employee Document** or **View Employee Documents**.

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**Note:** Depending on configuration, you may be prompted to enter a username and password to log in to the solution.

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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 2.1.3, "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.

## 2.1.2 Starting the Imaging Solution in Oracle PeopleSoft

Follow these steps to display the Imaging Solution from Oracle PeopleSoft.

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**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. Display a supported Oracle PeopleSoft page.
2. From the toolbar, click the button or link or select the command that activates the solution.

For example, if using an invoice processing imaging solution, you might select **Process Invoices**. For a document imaging solution, you might select a command called **Scan Employee Document** or **View Employee Documents**.

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**Note:** Depending on configuration, you may be prompted to enter a user name and password to log in to the solution.

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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 2.1.3, "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.

### 2.1.3 Viewing and Selecting Tasks

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

When you select a task, it is acquired for your use and no longer available to other users also assigned the selected profile. It remains selected 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 2.1.5](#).

1. Start the Imaging Solution as described in [Section 2.1.1](#).
2. If needed, select a profile in the **Profile** field, and click **Refresh**.

Tasks are associated with a *profile*, where users assigned the profile can access its tasks. After you refresh the display, a list of the profile's tasks is displayed.

3. From the [Task List Screen](#), select a task.
  - 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.

### 2.1.4 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.

## 2.1.5 Releasing Tasks

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 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**.

## 2.1.6 Customizing the Task List Display

You can adjust the task list in the following ways:

- [Section 2.1.6.1, "Hiding or Displaying Columns"](#)
- [Section 2.1.6.2, "Reordering and Resizing Columns"](#)
- [Section 2.1.6.3, "Detaching the Display"](#)

### 2.1.6.1 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.

### 2.1.6.2 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:
  - Click a column's heading row, and drag and drop it to a new location. Columns are reordered.
  - Click **View**, then **Reorder Columns**. In the Reorder Columns popup displayed, select columns to display and click the up and down buttons to reorder them. The column you position topmost in this popup is displayed leftmost in the task list table. Click **OK**.

### 2.1.6.3 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.

## 2.1.7 Viewing Document Images

Follow these steps to view a document associated with a selected task in the Oracle I/PM 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 Oracle I/PM viewer in the large panel of the Task Viewer Screen. The document title is listed in the top tab.

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

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2. Use the Oracle I/PM 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 Fusion Middleware User's Guide for Oracle Imaging and Process Management*.

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

## 2.1.8 Customizing the Task Viewer Display

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

- The **Oracle I/PM Viewer** panel shows the document's image, along with related options. See [Section 2.1.7, "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 in Oracle I/PM 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 2.1.11, "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.
- To resize a panel, hover the cursor at the top of its title bar. When it becomes a two-headed arrow, click and drag it up or down to change its size.
- You can use the basic or advanced viewer mode. You must use the advanced viewer mode to add annotations, as your permissions allow.

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

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## 2.1.9 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.

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

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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**.

## 2.1.10 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.

## 2.1.11 Viewing and Entering Comments

The [Task Viewer Screen](#) typically includes a Comments side panel 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.





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.

- 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.



## 2.2 Imaging Solution Screens

The Imaging Solution contains the following user interface screens:

- [Section 2.2.1, "Task List Screen"](#)
- [Section 2.2.2, "Task Viewer Screen"](#)
- [Section 2.2.3, "Select User/Group Screen"](#)
- [Section 2.2.4, "Select Item Screen"](#)

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


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### 2.2.1 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.

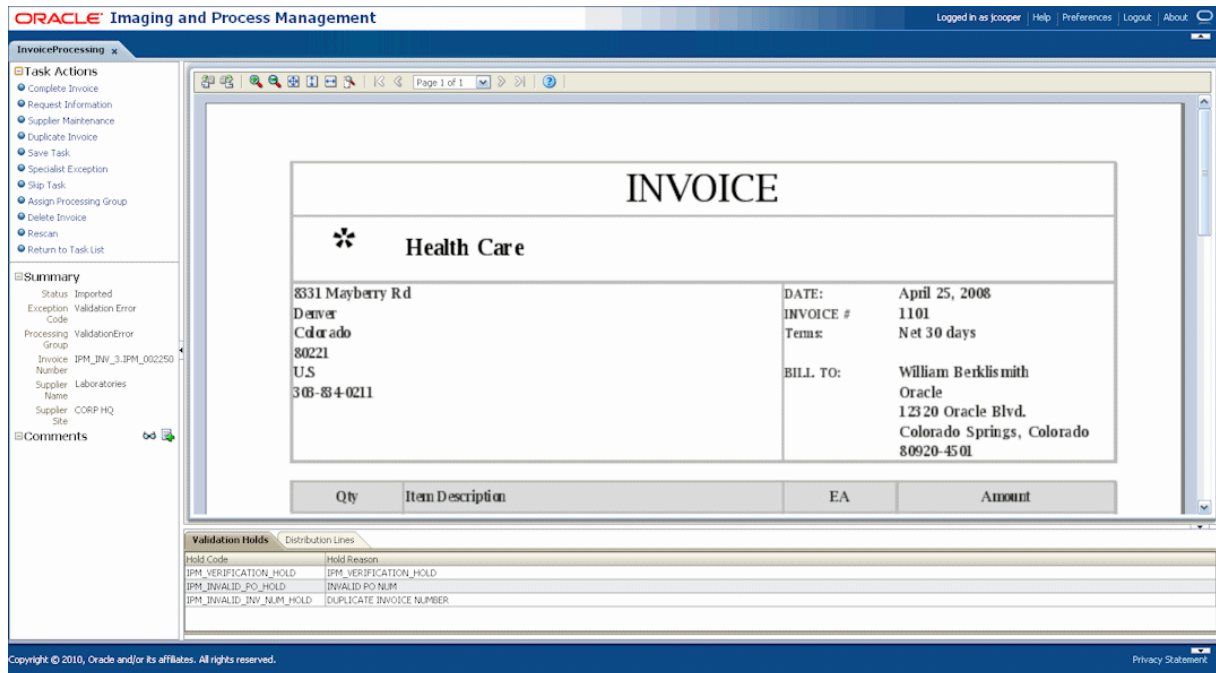
Action	Title	Task Number	Priority	Assignees	State	Create Date	Expired Date	Invoice Number	Status
View Task	Invoice Processing	200792	3	California	ASSIGNED	9/29/2010 2:08 PM			Received
View Task	Invoice Processing	200840	3	California	ASSIGNED	10/5/2010 2:35 PM			Received
View Task	Invoice Processing	200841	3	California	ASSIGNED	10/5/2010 2:35 PM			Received
View Task	Invoice Processing	200842	3	California	ASSIGNED	10/5/2010 2:42 PM			Received
View Task	Invoice Processing	200843	3	California	ASSIGNED	10/5/2010 2:42 PM			Received
View Task	Invoice Processing	200845	3	California	ASSIGNED	10/5/2010 2:44 PM			Received
View Task	Invoice Processing	200844	3	California	ASSIGNED	10/5/2010 2:44 PM			Received

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** solution button.

Element	Description
Task List Links	Depending on configuration, this 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.
View	Use this menu to reorder columns, hide or display columns, and detach the task list to a floating screen.
Profile	If needed, select a profile (category to which tasks are assigned) to view its tasks. You may be assigned multiple profiles.
	Click this Refresh button to update the task list display.
Auto Task	After selecting a profile, click this button to activate auto task mode, in which tasks are automatically selected and displayed in the <a href="#">Task Viewer Screen</a> , instead of you selecting them manually from the Task List Screen.
Release	Click to make a previously selected task available to all users assigned its profile. <b>Note:</b> 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.)
Detach	Click to expand the task list to a floating window you can reposition on the screen. To attach, click <b>Detach</b> again.
Table	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.
View Task	Click this link to view the selected task in the <a href="#">Task Viewer Screen</a> .

## 2.2.2 Task Viewer Screen

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

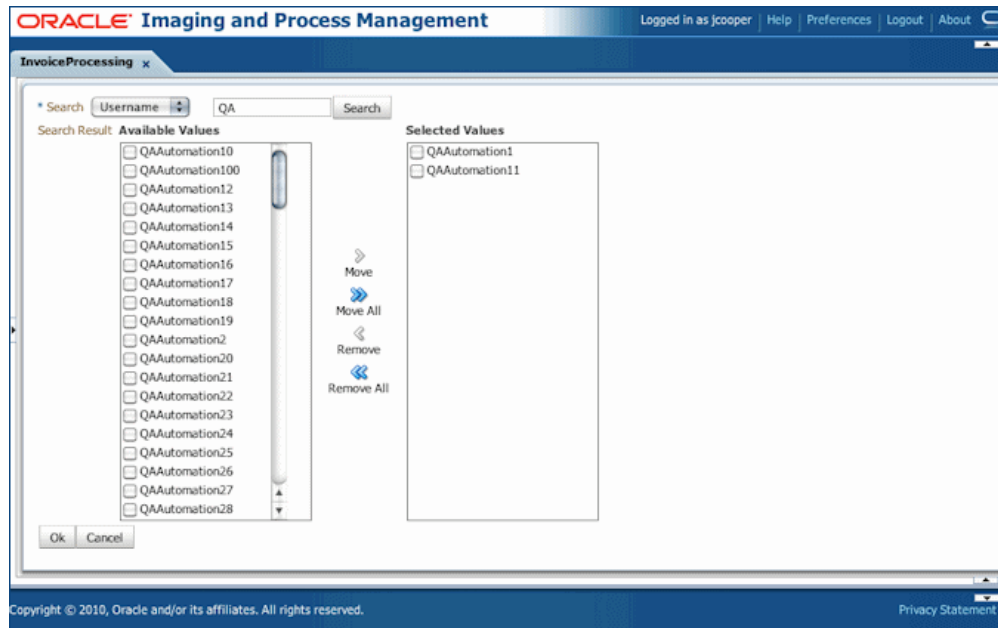


Display this screen from the [Task List Screen](#) in one of two ways: by clicking a specific task's **View Task** link or by clicking **Auto Task**.

Element	Description
Action Commands	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.
Summary	Displays metadata values stored in Oracle I/PM for the document, for reference.
Comments	Displays the first line of comments users have entered for the selected task. Use this area to view or enter comments.
Oracle I/PM Image Viewer	Displays the task's associated images in basic or advanced Oracle I/PM image viewer mode. For more information on the Oracle I/PM viewer, see the <i>Oracle Fusion Middleware User's Guide for Oracle Imaging and Process Management</i> .

## 2.2.3 Select User/Group Screen

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

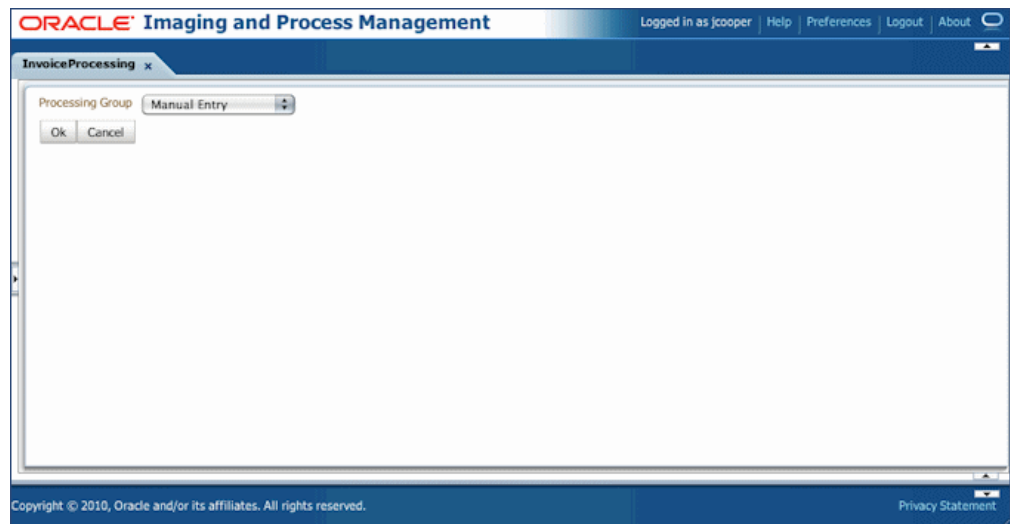


Display this screen by selecting a command requiring a user or group selection. For example, clicking an action command called **Approval** on the [Task Viewer Screen](#) might display the Select User/Group screen for selecting a group to request approval for a selected document.

Element	Description
Search	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.
Search Entry	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 <i>Ols</i> to find users with a last name of Olson.
Search	Click to search for users or groups that match the category and value you specified.
Available Values	Displays results from the search you performed by clicking <b>Search</b> . Select users from this list by clicking them and clicking <b>Move</b> or <b>Move All</b> .
Selected Values	Displays users currently selected for the task.
Move, Move All	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.
Remove, Remove All	Click to deselect a selected user or group (Remove) or all users and groups (Remove All) from the Selected Values field.
OK	Continue the task with the selected users or groups shown in the Selected Values field.
Cancel	Exit this screen without selecting users or groups.

## 2.2.4 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.

Element	Description
Item Selector	From the field listing choices, select an item and click <b>OK</b> .
OK	Exit the screen and use the selection made.
Cancel	Exit the screen, discarding any selection made.



---

## Using the Managed Attachments Solution

This chapter provides information on options available to business application users in the Managed Attachments screen configured through the adapter. It includes the following sections:

- [Section 3.1, "Managed Attachments Procedures"](#)
- [Section 3.2, "Managed Attachments Screens"](#)

### 3.1 Managed Attachments Procedures

This section describes how to perform the following tasks using the Managed Attachments screens. For more information about Content Server procedures, see the *Oracle Fusion Middleware User's Guide for Oracle Content Server*.

#### Viewing Attachments

- [Section 3.1.1, "Displaying Managed Attachments in Oracle E-Business Suite"](#)
- [Section 3.1.2, "Displaying Managed Attachments in Oracle PeopleSoft"](#)
- [Section 3.1.3, "Viewing Attached Documents"](#)
- [Section 3.1.4, "Viewing Documents in AutoVue"](#)
- [Section 3.1.5, "Configuring Fields For Display"](#)
- [Section 3.1.6, "Viewing a Document's Information"](#)

#### Attaching and Detaching Documents

- [Section 3.1.7, "Checking In and Attaching a Document"](#)
- [Section 3.1.8, "Checking Out Documents and Undoing Check-outs"](#)
- [Section 3.1.9, "Scanning Using Oracle Distributed Document Capture"](#)
- [Section 3.1.10, "Attaching From the Content Server Repository"](#)
- [Section 3.1.11, "Detaching a Document"](#)

#### Editing Attachments

- [Section 3.1.12, "Opening or Saving a Document"](#)
- [Section 3.1.13, "Editing a Document in Its Native Application"](#)
- [Section 3.1.14, "Updating a Document's Metadata"](#)
- [Section 3.1.15, "Working With Document Revisions"](#)
- [Section 3.1.16, "Deleting a Document on Content Server"](#)

### Finding Attachments

- [Section 3.1.17, "Searching for Documents on the Content Server Repository"](#)

## 3.1.1 Displaying Managed Attachments in Oracle E-Business Suite

Follow these steps to display the Managed Attachments screen for an Oracle E-Business Suite record.

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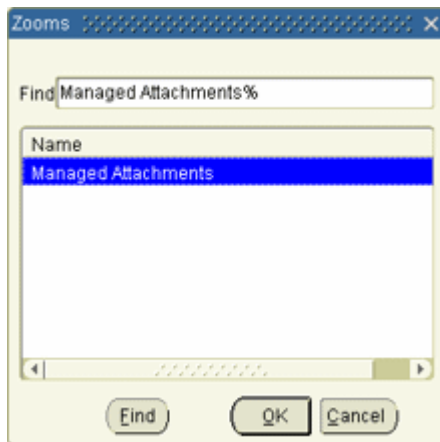
**Note:** Ensure the following browser settings are configured:

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

1. On an Oracle E-Business Suite form that supports managed attachments, display a record, and save it, if needed. (For example, create and save an invoice.)
2. From the toolbar, click the Zoom icon shown below.



3. From the Zooms menu, choose **Managed Attachments** and click OK.



---

---

**Note:** You may be prompted to enter a username and password to log in to Oracle UCM, depending on configuration. If prompted, enter the same username that you use to log in to Oracle E-Business Suite.

---

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The [Managed Attachments Screen](#) is displayed, listing any current attachments for the selected business application record. The line across the top provides key values for the selected business application entity with which the attachment list is associated.



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---

**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 select the Managed Attachments command again from the Zoom menu.

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### 3.1.2 Displaying Managed Attachments in Oracle PeopleSoft

Follow these steps to display the Managed Attachments screen for an Oracle PeopleSoft record.

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**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 an Oracle PeopleSoft page that supports managed attachments, display a record.
2. Activate Managed Attachments.

Depending on configuration, this might be clicking an **Attachments** button or link.

---

---

**Note:** You may be prompted to enter a username and password to log in to Oracle UCM, depending on configuration. If prompted, enter the same username that you use to log in to Oracle PeopleSoft.

---

---

The [Managed Attachments Screen](#) is displayed, listing any current attachments for the selected Oracle PeopleSoft record. The line across the top provides key values for the selected Oracle PeopleSoft entity with which the attachment list is associated.

---

---

**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.

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### 3.1.3 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 3.1.12, "Opening or Saving a Document."](#)

- Click the attachment's **Edit** icon under Actions options to make and save changes to the document. See [Section 3.1.13, "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 3.1.6, "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 3.1.4, "Viewing Documents in AutoVue."](#)

### 3.1.4 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 3.1.7, "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.

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**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.

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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 19.3 for Oracle UCM User's Manual* (or higher).

### 3.1.5 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.

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

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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.

### 3.1.6 Viewing a Document's Information

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

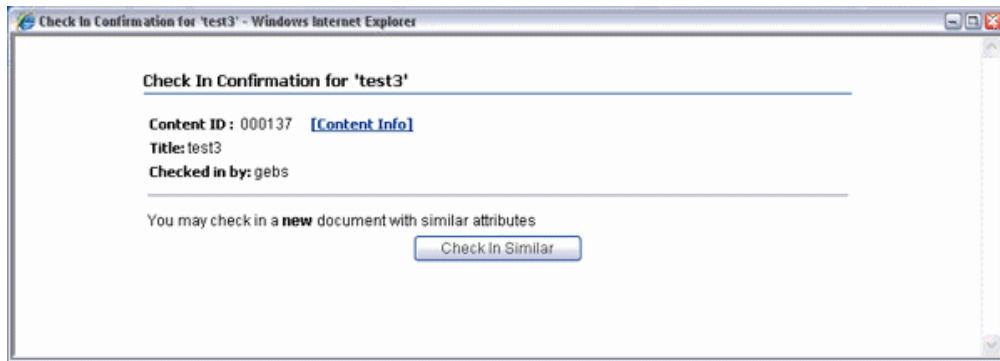
1. In the Managed Attachments screen, click the **Info** icon (displayed in the Info column) for a selected attachment.
2. View details about the document on the [Content Information Screen](#).

### 3.1.7 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 (default) to make the document a *private attachment*.
    - Documents that are *shared attachments* are viewable from Managed Attachments *and* from the standard Oracle UCM 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 Oracle UCM 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.

### 3.1.8 Checking Out Documents and Undoing Check-outs

Checking out a document in Oracle UCM 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.

### 3.1.9 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 Oracle UCM 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.

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

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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 Oracle UCM 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 Oracle UCM 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 shown in [Figure 3-1](#), 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 shown in [Figure 3-1](#), ready for you to review and index. (All files are imported into a single document in a single batch.)



### 3.1.10 Attaching From the Content Server Repository

Follow these steps to search for and attach documents from the Oracle UCM 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 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.

### 3.1.11 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 3.1.16, "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.

### 3.1.12 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 3.1.13, "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**.

### 3.1.13 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.

### 3.1.14 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.

### 3.1.15 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](#).



### 3.1.16 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 3.1.11, "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.



### 3.1.17 Searching for Documents on the Content Server Repository

Follow these steps to search for documents on the Content Server.

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

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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.

## 3.2 Managed Attachments Screens

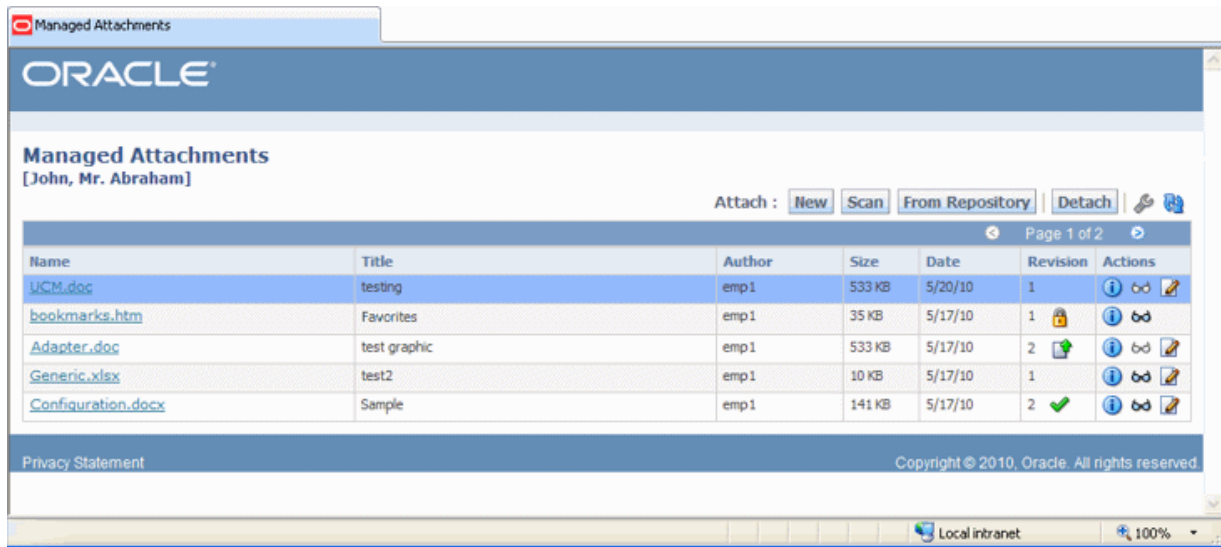
The Managed Attachments screens include:

- [Section 3.2.1, "Managed Attachments Screen"](#)
- [Section 3.2.2, "Content Check-In Form"](#)
- [Section 3.2.3, "Configure Fields for Display Screen"](#)
- [Section 3.2.4, "Content Information Screen"](#)
- [Section 3.2.5, "Info Update Form"](#)
- [Section 3.2.6, "Scan Document Screen"](#)
- [Section 3.2.7, "Expanded Search Form"](#)
- [Section 3.2.8, "Search Results Screen"](#)

### 3.2.1 Managed Attachments Screen

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

The Managed Attachments screen lists all Oracle UCM documents attached to the selected business application record, and provides the options listed in [Table 3-1](#).













### About the Managed Attachments Screen

- Metadata fields and values for the selected business application record are 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.
- The default columns are described in [Table 3–1](#), although users can customize the columns displayed, as described in [Section 3.1.5](#).
- 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.
- 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).
- The Managed Attachments screen is available for a certain amount of time. A message is displayed if your access expires, requiring you to activate Managed Attachments again for the selected business application record.

**Table 3–1 Managed Attachments Screen Options**

Elements	Icon or Button	Description
Name		Lists the native name (including extension) of each Oracle UCM 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 Oracle UCM document, assigned at check-in.
Author		Identifies the person who last checked in the file.
Size		Displays the size (KB/MB) of the attached Oracle UCM document.

**Table 3–1 (Cont.) Managed Attachments Screen Options**

Elements	Icon or Button	Description
Date		Displays the date on which the Oracle UCM document was last checked in to Oracle UCM.
Revision		<p>Displays information about the attached revision. Depending on configuration, some items may not be shown.</p> <ul style="list-style-type: none"> <li>■ <b>Number:</b> Indicates the revision number of the attachment.</li> <li>■ <b>Checked Out by Me</b> icon (check mark): Indicates that the attachment is checked out by you. Click this icon to display the <a href="#">Content Information Screen</a>, and check in or undo the check-out.</li> <li>■ <b>Checked Out By</b> 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.</li> <li>■ <b>Newer Revision Available</b> icon (page with up arrow): Indicates that a newer revision exists than the one attached. Click this icon to display the <a href="#">Content Information Screen</a>, and if needed, make the more recent revision the attached revision.</li> </ul>
Info		Click this icon to display detailed information and content actions for the selected document on the <a href="#">Content Information Screen</a> .
View in AutoVue		<p>Click this icon to view, print, collaborate, annotate, and mark up non-private (shared) attachments in the AutoVue document viewer, if configured.</p> <p>The AutoVue icon is dimmed (grayed out) for private attachments, which cannot be viewed using AutoVue.</p>
Edit		Click this icon to check out, open, and edit the attached Oracle UCM document in its native application.
New		Click to attach a document to the selected business application record, by completing fields on the <a href="#">Content Check-In Form</a> .
Scan		Click to scan or import a document and attach it to the business application record, as described in <a href="#">Section 3.1.9</a> .
From Repository		Click to search for files on the Content Server and attach them to the business application record.
Detach		Click to detach the selected document. Detaching removes the document from the business application entity, but not from Oracle UCM.
Configure		Click to select and order fields for display in the Managed Attachments screen using the <a href="#">Configure Fields for Display Screen</a> .
Refresh		Click to update the <a href="#">Managed Attachments Screen</a> display.

### 3.2.2 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.

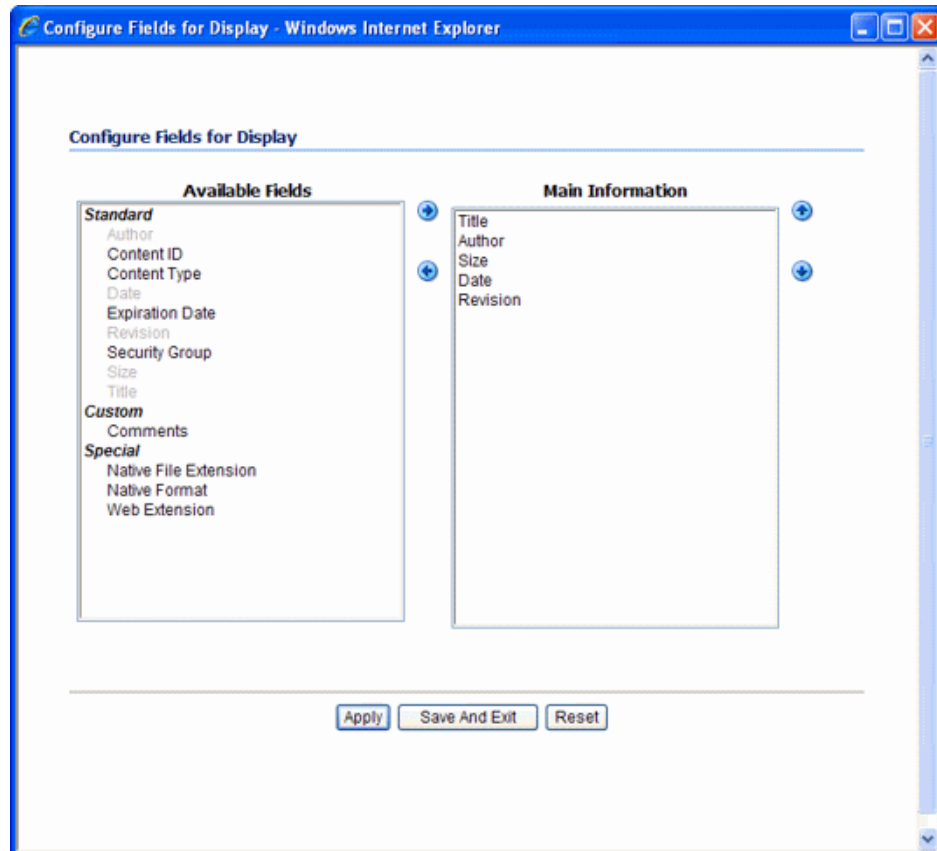
To display this form, click the **New** button in the [Managed Attachments Screen](#).

Elements	Description
Type	Select the option that best describes the type of file to be attached. The default document type is displayed. This field is required.
Title	Enter a descriptive title for the document. This field is required.
Author	Identifies the person who checked in the file.
Share Document	Select this field to make the document available to other Oracle UCM 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 Oracle UCM user interface.
Security Group	Select a security group for the file. Keep in mind that this file, if shared, is available to users who have permission to the specified security group. This field is required.
Primary File	Specify a primary file using one of these methods: <ul style="list-style-type: none"> <li>▪ Click <b>Browse</b> next to the field. Navigate to and select the native file, and then click <b>Open</b>.</li> <li>▪ Enter the complete path name and file name of the native file (for example, c:/My Documents/ABC Project/MyFile.doc).</li> </ul> This field is required.
Comments	Enter any notes about the file.

Elements	Description
Check In	Click to check in the specified document using the settings selected on this screen.
Reset	Click to cancel any entries and restore the default settings in this screen.

### 3.2.3 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 shown below in the [Managed Attachments Screen](#).

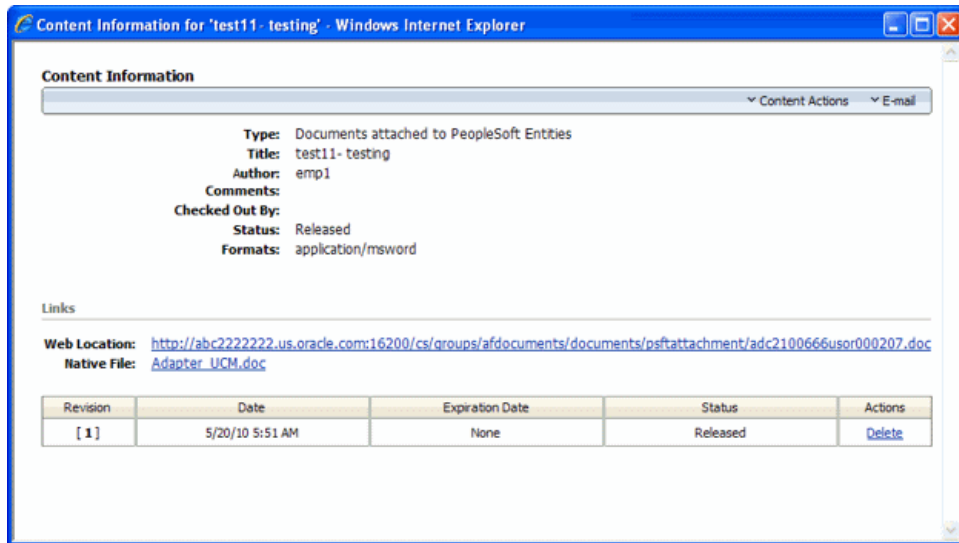


Elements	Description
Available Fields	Lists fields available for display in the Managed Attachments screen. Click the right arrow to move a selected field to the Main Information area. Fields selected for display are shown in dimmed characters.
Main Information	Lists fields selected for display in the 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.

Elements	Description
Apply	Click to preview your changes in the Managed Attachments screen. (If needed, temporarily reposition the Configure Fields for Display screen to view screen changes.)
Save And Exit	Click to save changes to the display configuration and return to the Managed Attachments screen.
Reset	Click to cancel any changes and restore the default display settings.

### 3.2.4 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](#).



Elements	Description
Type	Displays the type that best describes the document.
Title	Displays the title of the attached document, assigned at check-in.
Author	Identifies the person who last checked in the document.
Comments	Displays additional notes about the document.
Security Group	Identifies access permission to the document.
Checked Out By	Identifies the user who checked out the document.
Status	Identifies the document's current status. A status of <i>Released</i> indicates that the revision is available in the Content Server.
Formats	Identifies formats for the document.
Web Location	Click this link to view a web-viewable rendition of the attached document.

Elements	Description
Native File	Click this link to either save a copy of the document or open it in its native application.
Table	Lists revisions of the document, along with their release date, expiration date, and status. Click the <b>Delete</b> link to remove the corresponding revision.
Content Actions	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 <b>Newer Revision Available</b> icon on the Managed Attachments screen, an additional command is available: Choose <b>Update Attachment to This Revision</b> to make the newer revision the attached version.
E-mail	Click the <b>Send Link by E-mail</b> link to open a new e-mail message that contains a URL to the selected document.

### 3.2.5 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, as described in [Section 3.1.17, "Searching for Documents on the Content Server Repository."](#)

The screenshot shows a web browser window titled "Info Update Form for 'Ship5463761' - Windows Internet Explorer". The form itself is titled "Info Update Form for 'Ship5463761'". It contains several input fields and a checkbox:

- \* Type: A dropdown menu with the selected value "EBSAttachment - Documents attached to EBS Entitle:".
- \* Title: A text input field containing "Ship5463761".
- Author: A text input field containing "sh".
- \* Share Document: A checked checkbox.
- \* Security Group: A dropdown menu with the selected value "Public".
- Comments: A large text area for entering comments.

At the bottom of the form, there are two buttons: "Submit Update" and "Reset".

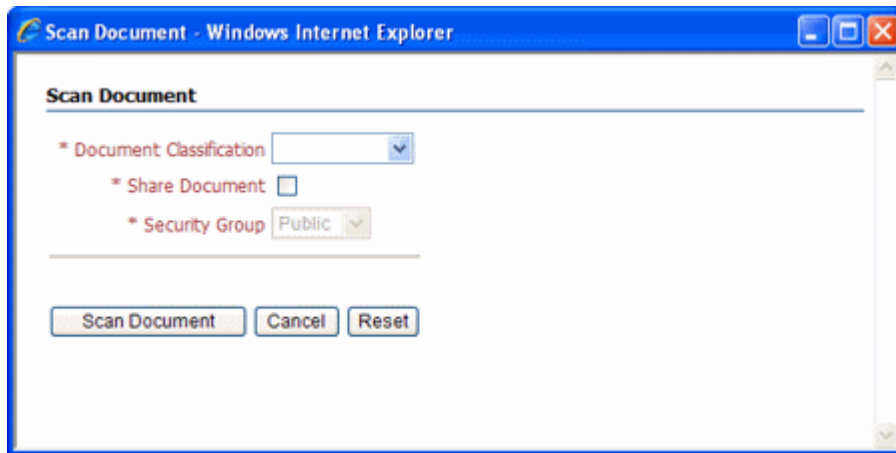
To display this form, click the **Info** icon for a selected attachment in the [Managed Attachments Screen](#), then choose **Update** from the **Content Actions** menu on the [Content Information Screen](#).

Elements	Description
Type	Select the option that best describes the file.
Title	Enter a descriptive title for the document.
Author	Identifies the user who checked in the current document revision.

Elements	Description
Share Document	Select this field to make the document available to other Oracle UCM 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 Oracle UCM user interface.
Security Group	Specifies access permission to the file. You can enter text or select from the list of predefined values.
Comments	Enter notes about the document.
Submit Update	Click to save the metadata changes to the attached document.
Reset	Click to cancel metadata changes and restore them to their values upon entering this form.

### 3.2.6 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](#).

Element	Description
Document Classification	Identify the type of document to be scanned or imported.
Share Document	Select this field to make the document available to other Oracle UCM 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 Oracle UCM user interface.
Security Group	Select a group for the document. <ul style="list-style-type: none"> <li>▪ If you selected <b>Share Document</b>, the document becomes available to users who have permission to this group.</li> <li>▪ If you left <b>Share Document</b> deselected, selecting a security group is not needed; this field is grayed out.</li> </ul>
Scan Document	Click to begin scanning or importing the document.
Cancel	Click to exit without scanning or importing.
Reset	Click to cancel any selections and restore the default settings in this screen.



### 3.2.7 Expanded Search Form

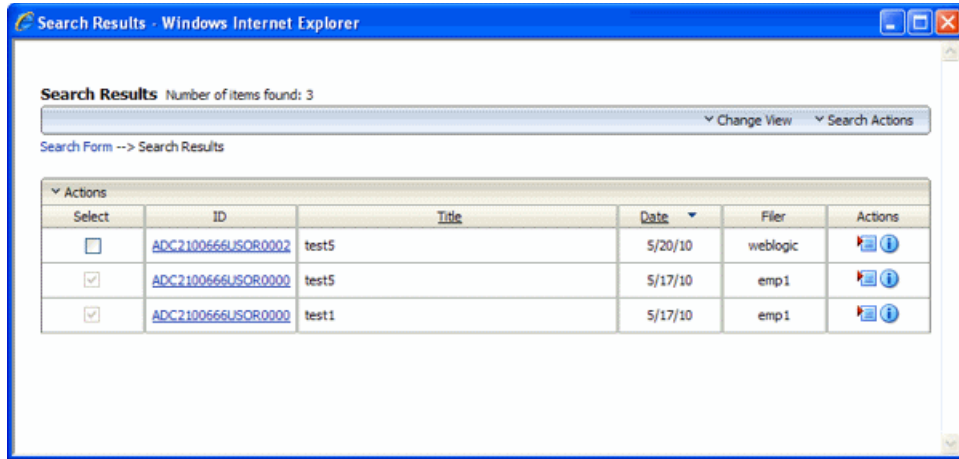
This search screen enables you to search the Content Server for documents to attach to the selected business application record. After specifying search criteria and clicking **Search**, results are listed in the [Search Results Screen](#).

To display this form, click the **From Repository** button in the [Managed Attachments Screen](#).

Elements	Description
Title	Select an operator and enter a document title.
Type	Select an operator and select a document type.
Security Group	Select an operator and search for the document's security group. (To search for private documents, select AFDocuments as the security group.)
Author	Select an operator and search for the person who checked in the file.
Comments	Specify an operator and search for files by their comments.
Results Per Page	Determines the number of results that are displayed on the search results page.
Sort By	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: <ul style="list-style-type: none"> <li>■ Release Date (default)</li> <li>■ Title</li> </ul>
Search	Click to perform the search using the selected search criteria.
Reset	Restores the form to its default settings.

### 3.2.8 Search Results Screen

This screen displays the results of a Content Server repository search and enables you to attach one or more documents to the selected business application record. You can also save or restrict your search using standard Oracle UCM query actions.



To display this screen, click the **From Repository** button in the [Managed Attachments Screen](#), specify a search in the [Expanded Search Form](#), and click **Search**.

Elements	Description
Select	Select one or more documents to attach. A dimmed box is displayed if a document is attached to the business application record.
Actions	Select options from this menu. To attach the selected documents to the business application record, choose <b>Attach to current Application Entity</b> .
Change View	Select another Content Server results view.
Search Actions	Optionally save the search for future use.

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