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


#### Access to Oracle Support


### Related Documents

For administrator adapter information, see the *Oracle Fusion Middleware Administering the Application Adapters for Oracle WebCenter*.

### 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><strong>italic</strong></td>
<td>Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.</td>
</tr>
<tr>
<td><strong>monospace</strong></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.
- 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 window, start the invoice Imaging Solution.

2. Select a task. In the Task Viewer window, view the invoice image and its associated metadata values.

3. In the invoice entry window, 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 window (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 page 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.
The BPM imaging solution, part of the Oracle WebCenter application adapter, provides a solution workspace for selecting and completing human tasks. Whether you enter the workspace by selecting a command in your business application or by clicking an email link, the BPM imaging solution extends your business application, allowing you to process assigned tasks without leaving your business application location.

This chapter covers the following main topics:

- Section 2.1, "Navigating the BPM Solution Workspace"
- Section 2.2, "Using Views"
- Section 2.3, "Using the Task List"
- Section 2.4, "Using Task Details"
- Section 2.5, "What else do I need to know?"

### 2.1 Navigating the BPM Solution Workspace

**Note:** If using the BPM imaging solution in the Firefox browser, ensure that popup blockers are turned on. The solution may not load correctly when run in Firefox when popup blockers are turned off.

The solution workspace contains the panes described below, and shown in Figure 2–1. The main way you navigate the workspace is by selecting tasks from the Task List pane and working on them one at a time in the Task Details pane.

- The Views pane (upper left) lists your available task views. See Section 2.2.
- The Task List pane (upper right), lists assigned tasks for the selected view. See Section 2.3.
- The Task Details pane (lower right), displays task details and actions for the task selected in the task list. See Section 2.4.
2.2 Using Views

Use the Views pane to access task views.

- How do I use the views?
- How do I hide or restore the Views pane?
- How do I edit Inbox view preferences?
- How do I view overall task status?

2.2.1 How do I use the views?

The Views pane provides access to work queues to which you are assigned.

- **My Tasks** in the Inbox is selected by default when you enter the BPM imaging solution and provides access to your assigned tasks, which are listed in the Task List pane.

- **Standard Views** includes filtered views of tasks, such as tasks due soon.

You can use the following icons in the Views pane:
2.2.2 How do I hide or restore the Views pane?

You can hide or restore the Views pane using the following methods:

- Click the Unpin and Pin icons (described in Section 2.2.1) to hide and display the Views pane, respectively.
- Click the Collapse Pane/Restore Pane icon (shown below) at the edge of the solution workspace panes to hide or restore the pane.

2.2.3 How do I edit Inbox view preferences?

To edit Inbox view preferences, select the MyTasks heading and click the Edit icon. In the Edit User Preferences window that displays, use the arrow buttons to move columns to the Selected Columns field to display them in the task list, or to the Available Columns field to hide them. In addition, use the options to specify column sort order and the number of tasks to display.

2.2.4 How do I view overall task status?

Clicking the Task Status icon (shown below) provides a visual display of tasks categorized by their status. For example, you might view the number of completed versus assigned tasks. Click the Edit icon to select or deselect task states to display or hide.

2.3 Using the Task List

Use the Task List pane to view tasks and items assigned to you, and to work on tasks by selecting them and performing actions in the Task Details pane.

- What is a task?
- How do I view a task's details?
- How do I sort the task list?
- How do I hide or restore the Task List pane?
- How do I filter the task list?
- How do I search for tasks?
2.3.1 What is a task?

A task is a human interaction with a business process. For example, a task may involve approving a document, entering information, handling an exception, or performing activities required to advance the business process, such as routing the task to another user or group.

By default, the task list displays the following columns:

<table>
<thead>
<tr>
<th>Default Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>The title specified when the human task was created.</td>
</tr>
<tr>
<td>Number</td>
<td>The task number generated when the task was created.</td>
</tr>
<tr>
<td>Priority</td>
<td>The priority specified when the human task was created. The highest priority is 1; the lowest is 5.</td>
</tr>
<tr>
<td>Created</td>
<td>Date and time on which the human task was created.</td>
</tr>
<tr>
<td>Expires</td>
<td>Date and time (if any) on which the task expires, specified when the human task was created.</td>
</tr>
</tbody>
</table>

2.3.2 How do I view a task's details?

To display the details of a task, select it in the Task List pane. The details are displayed in the lower right pane. See Section 2.4.

2.3.3 How do I sort the task list?

To sort the task list by column, hover the cursor over a column heading. A triangle (ascending) and an upside down triangle (descending) display. Click a triangle to sort the list in ascending or descending order. You can sort by one column only.

2.3.4 How do I hide or restore the Task List pane?

An icon at the edge of the solution workspace panes enables you to hide or restore the pane. Hover the cursor over the icon to view its function. Click the icon to either collapse or restore the pane.

2.3.5 How do I filter the task list?

Filters are used to display a subset of tasks, based on criteria you specify. To filter, select one of the filter fields along the top of the Task List pane:
2.3.6 How do I search for tasks?

You can search for tasks by their titles and certain string fields. You can also filter the task list and use advanced search filters.

To filter tasks based on assignee or state:

1. Select options from the **Assignee** and **State** fields in the Task List pane.

   The task list is automatically updated based on the filter selections.

To filter tasks based on keyword search:

1. In the **Search** field, enter a keyword to search for task titles or certain string fields.
   
   For example, entering **Entry** matches tasks with a title of *Sales Quote Entry*.

2. Click the adjacent **Search** icon to perform the search.

   To remove the search, delete the search criteria from the **Search** field and click the **Search** icon.

To filter tasks based on an advanced search:

1. Click the **Advanced** link.

2. In the Advanced Search window that displays, specify search conditions.

3. Click the **Search** button to perform the advanced search.

2.4 Using Task Details

The Task Details pane provides functionality for working on and completing selected tasks.

- What does the Task Details pane contain?
- How do I display the Task Details pane only and hide the other panes?
- How do I use the Image Viewer?
- How do I select or enter data values in fields and tables?
How do I insert, copy, paste, and delete table rows?
How do I view or enter comments?
How do I know if the task data has been updated?
How do I stop working on a task?

2.4.1 What does the Task Details pane contain?

The contents of the Task Details pane vary according to the type of task and the solution's configuration. However, the Task Details pane in a BPM imaging solution typically contains the following components:

- **Action controls**, which extend along the upper left portion of the pane. Typically, they include links or menus for main task actions, such as Approve or Reject links or menu commands such as Route or Send for Approval. In addition, action controls typically contain a Close Task link or command for closing a task (see Section 2.4.8).

- **Dynamic tabs**, whose display and contents relate to the selected task. Tabs may contain the following:
  - **Image**, which typically displays a document in a viewer. If permissions allow, you may be able to enter annotations or redactions on the image. See Section 2.4.3.
  - **Data Fields** or **Tables**, whose values may be editable or read-only. You may be able to edit data fields that are static (contain fixed choices) or dynamic (values may change, depending on results from a database query). See Section 2.4.4.
  - **Comments**, which displays any previous comments users have entered for the task and enables you to enter a new comment. See Section 2.4.6.

- **Update Status**, an icon on the upper right side that indicates data update status (see Section 2.4.7).

2.4.2 How do I display the Task Details pane only and hide the other panes?

You can hide the Views and Task List panes to enlarge the Task Details pane:

- Hide the Views pane by clicking the **Unpin** icon, as described in Section 2.2.2.
- Click the **Collapse Pane** icon shown below to hide or display the Task List pane. This icon switches between collapsing and restoring the pane.

2.4.3 How do I use the Image Viewer?

Depending on solution configuration, an Image tab in the Task Details pane may display a document image for the task, along with related options.

1. Use the Imaging viewer toolbar buttons to perform tasks such as rotating images, zooming in or out, or moving between pages of the document.
2. If permissions allow, you may be able to add redactions and annotations to images. You must use the advanced viewer mode for these options.

For more information, see the *Oracle Fusion Middleware Using Oracle WebCenter Content: Imaging*. 
2.4.4 How do I select or enter data values in fields and tables?

Depending on solution configuration, you may complete data fields or tables in one of the following ways. A table may display data values you can modify, and you may be able to add, edit, and modify rows of data values.

<table>
<thead>
<tr>
<th>Data or Table Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry fields</td>
<td>are read-only if you cannot change their contents when you hover the cursor over them. If a field is editable, you can specify a new entry.</td>
</tr>
<tr>
<td>Date fields</td>
<td>For date fields, click the adjacent Select Date icon and choose a date from the calendar that displays.</td>
</tr>
<tr>
<td>Choice list fields</td>
<td>For choice list fields, click the triangle and select an option from the list that displays.</td>
</tr>
<tr>
<td>Dynamic search fields</td>
<td>For dynamic search fields, click the Search icon and choose a selection from the search results that display. If needed, use search options to narrow the search results from which to choose.</td>
</tr>
<tr>
<td>Number fields</td>
<td>For number fields that include a spinner box, click the upper triangle to increment the number by one, or the lower triangle to decrement the number by one.</td>
</tr>
</tbody>
</table>

View

- **Columns**: Select columns to display or hide in the table, by either selecting them in the list or choosing Columns, then Manage Columns.
- **Detach**: Magnify the table as described under the Detach icon below.

Insert

- Click this button to add a new row to the bottom of the table.

Delete

- Click this button to remove the selected row from the table.

Copy

- Click this button to copy one or more columns from the selected row for pasting. Select each column to copy or All.

Paste

- Click this button to paste columns from a previously copied row onto the selected row. Note that pasting replaces the selected row’s current entries.

Detach

- Click the Detach icon to magnify the table so that it fills the Task Details pane. Note that selecting the Detach icon again switches the table display back to its original view.

2.4.5 How do I insert, copy, paste, and delete table rows?

As part of completing tasks, you may need to enter or review data fields grouped in tables. Buttons are provided for inserting, copying, pasting, and deleting data by rows. Note that you can zoom in on the table view by clicking the Detach button, which magnifies the table and hides all other Task Details items; click the close button to close the detached view and display all Task Details items.
To remove a row, select any of its fields and click the **Delete** button. The row is removed.

To insert a row, click the **Insert** button and a blank row is added to the bottom of the table.

To duplicate a row:
1. Click the **Insert** button to insert a blank row.
2. Select the row to copy, click the **Copy** button, and select columns to copy from the list that displays (all, or one or more).
3. Select the blank row and click the **Paste** button. The copied columns replace those in the blank row. Note that number fields not pasted display with 0 values instead of blank.

### 2.4.6 How do I view or enter comments?

Clicking the Comments tab displays a list of any comments for the task previously added by you or other users.

To add a comment:
1. Click the **Create** icon shown below.

![Create Icon](image)

2. In the Create Comment window, enter a comment in the **Comment** field.
3. Specify if you want the comment visible to task participants only or to all process participants, and click **OK**.

### 2.4.7 How do I know if the task data has been updated?

The Task Details pane includes an **Update Status** icon that becomes selected when an update to the underlying metadata has occurred. For example, this icon changes when a value is updated in your business application. (Note that this icon does not change when you make changes to data values on the Task Details pane, only when an external update occurs.)

![Update Status Icon](image)

When you see this icon has changed, click it to acknowledge that task data has been updated. Doing so resets the icon to a current no update state.
2.4.8 How do I stop working on a task?

To stop working on a task, regardless of whether it is complete, click the Close Task action link in the Task Details pane. This frees the task for other users to work on.

2.5 What else do I need to know?

- How do I display the BPM imaging solution?
- How do I set preferences for the solution workspace?
- How do I refresh the workspace?

2.5.1 How do I display the BPM imaging solution?

Follow these steps to display the BPM imaging solution from a business application such as Oracle E-Business Suite. Note that another method for displaying the BPM imaging solution is by clicking a link in an email that displays the BPM imaging solution.

1. On a business application window that supports the imaging solution, display a record.

2. Activate the imaging solution. Depending on configuration, you might:
   - Click a button or link (for example, Sales Quote Entry), or
   - 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, Start Sales Quote Entry), and click OK.

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

   The imaging solution displays.

2.5.2 How do I set preferences for the solution workspace?

Click the Preferences link in the upper right corner of the screen to set preferences. Select accessibility preferences such as using a screen reader, disabling user interface animations, using high contrast colors, and displaying large fonts.
2.5.3 How do I refresh the workspace?

Click the **Refresh** link at the top of the task list to reload the solution workspace’s contents. For example, if other users completed tasks, the tasks no longer display after you click **Refresh**.
This chapter describes how to use the BPEL 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 3.1, "Displaying the BPEL Imaging Solution From the Business Application"
- Section 3.2, "Working with the BPEL Task List"
- Section 3.3, "Performing BPEL Imaging Tasks"

### 3.1 Displaying the BPEL Imaging Solution From the Business Application

Follow these steps to display the Imaging Solution from a 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 window 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 user name 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 window 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 3.2.1.

- 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.

### 3.2 Working with the BPEL Task List

This section includes the following topics:

- Section 3.2.1, "Viewing and Selecting Tasks"
- Section 3.2.2, "Automatically Selecting Tasks"
- Section 3.2.3, "Releasing Tasks"
- Section 3.2.4, "Customizing the Task List Display"
- Section 3.2.5, "Sorting Tasks"
- Section 3.2.6, "Searching for Tasks"

#### 3.2.1 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 3.2.3.

1. Start the Imaging Solution as described in Section 3.1.
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 window.
   - To manually select a task, click its **View Task** link in the Action column. The task is displayed in the Task Viewer window.
   - A side panel may list additional task list actions you can perform.
3.2.2 Automatically Selecting Tasks

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

1. Display the Task List window.
2. Click Auto Task.
   
The Task Viewer window 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.

3.2.3 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 window.
2. Select a task to release.
3. Click Release.

3.2.4 Customizing the Task List Display

You can adjust the task list in the following ways:

- Section 3.2.4.1, "Hiding or Displaying Columns"
- Section 3.2.4.2, "Reordering and Resizing Columns"
- Section 3.2.4.3, "Detaching the Display"

3.2.4.1 Hiding or Displaying Columns

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

1. Display the Task List window. 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.

3.2.4.2 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 window. 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:
3.2.4.3 Detaching the Display
Follow these steps to display an expanded view of the task list in a detached, movable window.

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

3.2.5 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 3.2.2.

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

1. Display the Task List window. 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.

3.2.6 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 autotask 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 window.

1. Display the Task List window. 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.

3.3 Performing BPEL Imaging Tasks

This section includes the following topics:
- Section 3.3.1, "Viewing Document Images"
- Section 3.3.2, "Customizing the Task Viewer Display"
- Section 3.3.3, "Selecting Users or Groups"
- Section 3.3.4, "Selecting Items"
- Section 3.3.5, "Viewing and Entering Comments"

3.3.1 Viewing Document Images

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

1. Display the Task Viewer window, either by selecting a task or choosing Auto Task in the Task List window.
   
The task's document is displayed in the Imaging viewer in the large panel of the Task Viewer window.

   __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 Fusion Middleware Using Oracle WebCenter Content: Imaging.

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

3.3.2 Customizing the Task Viewer Display

In addition to the Imaging image viewer, the Task Viewer window 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 3.3.1.
- 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 3.3.5.
- 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 window to set the basic or advanced viewer mode to display by default.

### 3.3.3 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 window.
   This window 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**.

### 3.3.4 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 window.
   This window 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 window without a selection.
3.3.5 Viewing and Entering Comments

The Task Viewer window 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 window, 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.

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.
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 4.1, "Viewing Attachments"
- Section 4.2, "Attaching and Detaching Documents"
- Section 4.3, "Editing Attachments"
- Section 4.4, "Finding Attachments"

For more information about Content Server procedures, see *Oracle Fusion Middleware Using Oracle WebCenter Content*.

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**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).

### 4.1 Viewing Attachments

This section includes the following topics:

- Section 4.1.1, "Displaying Managed Attachments in the Business Application"
- Section 4.1.2, "Viewing Attached Documents"
- Section 4.1.3, "Viewing Documents in AutoVue"
- Section 4.1.4, "Configuring Fields For Display"
- Section 4.1.5, "Viewing a Document's Information"

#### 4.1.1 Displaying Managed Attachments in the Business Application

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

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

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

Note: You have access to the Managed Attachments page 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 page, follow the steps in this section to redisplay the Managed Attachments page.

- Metadata fields and values for the selected business application record may be displayed on the page 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.

### 4.1.2 Viewing Attached Documents

The Managed Attachments page 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 4.3.1.
- Click the attachment's **Edit** icon under Actions options to make and save changes to the document. See Section 4.3.2.
- Click the **Info** icon to view the attachment's content information, and view the Web-viewable or native version of the document. See Section 4.1.5.
- 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 4.1.3.

### 4.1.3 Viewing Documents in AutoVue

Depending on configuration, you may have access to enhanced viewing options in the Managed Attachments page 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 4.2.1.

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

   ![AutoVue Icon](image)

   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).

### 4.1.4 Configuring Fields For Display

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

1. On the Managed Attachments page, click the **Configure** icon, as shown below.

2. On the Configure Fields for Display page, 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 page.

### 4.1.5 Viewing a Document's Information

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

1. On the Managed Attachments page, click the **Info** icon displayed in the Info column for a selected attachment.

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

### 4.2 Attaching and Detaching Documents

This section includes the following topics:

- Section 4.2.1, "Checking In and Attaching a Document"
- Section 4.2.2, "Checking Out Documents and Undoing Check-outs"
- Section 4.2.3, "Scanning Using Oracle WebCenter Capture"
- Section 4.2.4, "Scanning Using Oracle Distributed Document Capture"
- Section 4.2.5, "Attaching From the Content Server Repository"
- Section 4.2.6, "Detaching a Document"
4.2.1 Checking In and Attaching a Document

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

1. On the Managed Attachments page, 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 page.
5. On the Managed Attachments page, click Refresh to display the newly checked in attachment.

4.2.2 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 page. 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 page. 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 page, and choose **Undo Check-out** from its Content Actions menu.

### 4.2.3 Scanning Using Oracle WebCenter Capture

The Managed Attachments page provides a Scan button that, when configured, launches the Oracle WebCenter Capture application and enables you to either scan a document using a TWAIN compliant scanner or import a file. After reviewing, editing, and indexing the document, click the **Release** button, which transfers it from Oracle WebCenter 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.
2. On the Managed Attachments page, click the **Scan** button. The Scan Document window is displayed.
3. Select a classification from the **Document Classification** drop-down list.
   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 WebCenter 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 as shown in Figure 4–1, ready for you to review and index.
If set for importing, a File Import window is displayed, prompting you to select one or more files to import. You can import non-image files in addition to image files, if allowed by the client profile. After you select files, their pages are displayed as shown in Figure 4–1, ready for you to review and index.

Figure 4–1  WebCenter Capture Client Window

7. In the client window, review, edit, and index the document. For more information, see Oracle Fusion Middleware Using Oracle WebCenter Capture. Follow these guidelines:
   - You can add pages to documents, but should not add documents to the batch.
   - Metadata fields are displayed in the lower side pane. Metadata fields provide values that are stored as metadata with the Content Server document. An asterisk is displayed before the names of required metadata fields.
   - All pages in a document have the same metadata 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 WebCenter Capture window and return to the Managed Attachments page and perform a new scan or import. This ensures that the metadata values are properly set for attachments.

8. When done, click Release to commit the document to Content Server and attach it to the business application record.

   **Note:** If you release a batch without completing its required metadata fields, the batch may encounter an error when Content Server attempts to store and attach its documents.
9. On the Managed Attachments page, 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.

4.2.4 Scanning Using Oracle Distributed Document Capture

The Managed Attachments page 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. On the Managed Attachments page, click the Scan button. The Scan Document page 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 window, 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 window 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 window, ready for you to review and index. All files are imported into a single document in a single batch.
7. In the Review/Index window, review, edit, and index the document. For more 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 window and return to the Managed Attachments page 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**.

**Note:** If required index fields are not complete, you are prompted to complete them to send the batch.

The client displays batch send results.

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

10. On the Managed Attachments page, 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.
4.2.5 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. On the Managed Attachments page, 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. On the Managed Attachments page, click the Refresh button to display the document(s) now attached to the selected business application record.

4.2.6 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 4.3.5.

1. On the Managed Attachments page, 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.

4.3 Editing Attachments

This section includes the following topics:

- Section 4.3.1, "Opening or Saving a Document"
- Section 4.3.2, "Editing a Document in Its Native Application"
- Section 4.3.3, "Updating a Document’s Metadata"
- Section 4.3.4, "Working With Document Revisions"
- Section 4.3.5, "Deleting a Document on Content Server"

4.3.1 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 4.3.2.
1. On the Managed Attachments page, 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.

4.3.2 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. On the Managed Attachments page, 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.

4.3.3 Updating a Document’s Metadata

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

1. On the Managed Attachments page, click the Info icon for a selected attachment.

2. On the Content Information page, 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.

4.3.4 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 on the Content Information page.
4.3.5 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 4.2.6.

1. On the Managed Attachments page, 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.

4.4 Finding Attachments

This section includes the following topics:

- Section 4.4.1, "Searching for Documents on the Content Server Repository"
- Section 4.4.2, "Searching Within the Attachments List"

4.4.1 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. On the Managed Attachments page, 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, choose Attach to current Application Entity from the Actions menu displayed above the Select column.

4.4.2 Searching Within the Attachments List

Follow these steps to search within the attachments list.

1. On the Managed Attachments page, 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.
This appendix describes the Imaging Solution user interface windows, including windows for selecting and editing tasks, and for selecting items, users, and groups.

The Imaging Solution includes the following windows:

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

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

### A.1 Task List Window

Use this window 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.

To display this window, start the Imaging Solution in your business application by clicking the button or link or choosing 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 Windows

Use this window 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 window.</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></td>
<td>Click this <strong>Refresh</strong> button to update the task list display.</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 Windows, instead of you selecting them manually from the Task List window.</td>
</tr>
<tr>
<td>Release</td>
<td>Click to make a previously selected task available to all users assigned its profile. <em>Note:</em> 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. To attach, click <strong>Detach</strong> 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 Windows.</td>
</tr>
</tbody>
</table>
Display this window from the Task List Window 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 about the Imaging viewer, see the Oracle Fusion Middleware Using Oracle WebCenter Content: Imaging.</td>
</tr>
</tbody>
</table>

**A.3 Select Item Window**

Use this window to select an item from a list of choices.
Select User/Group Window

Display this window by choosing a command requiring a selection. For example, clicking an action command called **Assign Processing Group** on the Task Viewer window might display the Select Item window 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><strong>OK</strong></td>
<td>Exit the window and use the selection made.</td>
</tr>
<tr>
<td><strong>Cancel</strong></td>
<td>Exit the window, discarding any selection made.</td>
</tr>
</tbody>
</table>

### A.4 Select User/Group Window

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

Display this window by selecting a command requiring a user or group selection. For example, clicking an action command called **Approval** on the **Task Viewer Windows** might display the Select User/Group window for selecting a group to request approval for a selected document.
<table>
<thead>
<tr>
<th>Element</th>
<th>Description</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 Ols 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 window without selecting users or groups.</td>
</tr>
</tbody>
</table>
This appendix describes the Managed Attachments user interface pages, including pages for viewing attachments and their information, and checking in, scanning, editing, and searching for attachments.

The Managed Attachments solution includes the following pages:

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

Note: For more information about Content Server pages, see Oracle Fusion Middleware Using Oracle WebCenter Content.

B.1 Managed Attachments Page

Use this page 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.

This page lists all Content Server documents attached to the selected business application record, and provides the options listed in the following table.
<table>
<thead>
<tr>
<th><strong>Element</strong></th>
<th><strong>Icon or Button</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Title</td>
<td></td>
<td>Displays the title of the attached Content Server document, assigned at check-in.</td>
</tr>
<tr>
<td>Author</td>
<td></td>
<td>Identifies the person who last checked in the file.</td>
</tr>
<tr>
<td>Size</td>
<td></td>
<td>Displays the size (KB/MB) of the attached Content Server document.</td>
</tr>
<tr>
<td>Date</td>
<td></td>
<td>Displays the date on which the Content Server document was last checked in to Content Server.</td>
</tr>
<tr>
<td>Revision</td>
<td>![icons]</td>
<td>Displays information about the attached revision. Depending on configuration, some items may not be shown.</td>
</tr>
<tr>
<td></td>
<td>![Number]</td>
<td><strong>Number</strong>: Indicates the revision number of the attachment.</td>
</tr>
<tr>
<td></td>
<td>![Checked Out by Me]</td>
<td><strong>Checked Out by Me</strong> icon (check mark): Indicates that the attachment is checked out by you. Click this icon to display the Content Information Page, and check in or undo the check-out.</td>
</tr>
<tr>
<td></td>
<td>![Checked Out By]</td>
<td><strong>Checked Out By</strong> 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.</td>
</tr>
<tr>
<td></td>
<td>![Newer Revision Available]</td>
<td><strong>Newer Revision Available</strong> icon (page with up arrow): Indicates that a newer revision exists than the one attached. Click this icon to display the Content Information Page, and if needed, make the more recent revision the attached revision.</td>
</tr>
<tr>
<td>Info</td>
<td>![i]</td>
<td>Click this icon to display detailed information and content actions for the selected document on the Content Information Page.</td>
</tr>
<tr>
<td>View in AutoVue</td>
<td>![AutoVue]</td>
<td>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.</td>
</tr>
<tr>
<td>Edit</td>
<td>![edit]</td>
<td>Click this icon to check out, open, and edit the attached Content Server document in its native application.</td>
</tr>
</tbody>
</table>
Content Check-In Form

B.2 Content Check-In Form

Use this page to check in documents to Content Server, assign them metadata values, and attach them to the selected business application record.

<table>
<thead>
<tr>
<th>Element</th>
<th>Icon or Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td></td>
<td>Click to attach a document to the selected business application record, by completing fields on the Content Check-In Form.</td>
</tr>
<tr>
<td>Scan</td>
<td></td>
<td>Click to scan or import a document and attach it to the business application record.</td>
</tr>
<tr>
<td>From Repository</td>
<td></td>
<td>Click to search for files on the Content Server and attach them to the business application record.</td>
</tr>
<tr>
<td>Search Within</td>
<td></td>
<td>Click to search within the Managed Attachments list on the Expanded Search Form.</td>
</tr>
<tr>
<td>Detach</td>
<td></td>
<td>Click to detach the selected document. Detaching removes the document from the business application entity, but not from Content Server.</td>
</tr>
<tr>
<td>Configure</td>
<td></td>
<td>Click to select and order fields for display in the Managed Attachments page using the Configure Fields for Display Page.</td>
</tr>
<tr>
<td>Refresh</td>
<td></td>
<td>Click to update the Managed Attachments Page display.</td>
</tr>
</tbody>
</table>

To display this page, click the New button in the Managed Attachments Page.

<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>
B.3 Configure Fields for Display Page

Use this page to specify the attachment information to display in the Managed Attachments page.

<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 Browse next to the field. Navigate to and select the native file, and then click Open.</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). 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 page.</td>
</tr>
<tr>
<td>Reset</td>
<td>Click to cancel any entries and restore the default settings on this page.</td>
</tr>
</tbody>
</table>
To display this page, click the **Configure** button in the **Managed Attachments Page**.

### B.4 Content Information Page

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

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

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
<td>Displays the type that best describes the document.</td>
</tr>
<tr>
<td><strong>Title</strong></td>
<td>Displays the title of the attached document, assigned at check-in.</td>
</tr>
<tr>
<td><strong>Author</strong></td>
<td>Identifies the person who last checked in the document.</td>
</tr>
<tr>
<td><strong>Comments</strong></td>
<td>Displays additional notes about the document.</td>
</tr>
<tr>
<td><strong>Security Group</strong></td>
<td>Identifies access permission to the document.</td>
</tr>
<tr>
<td><strong>Checked Out By</strong></td>
<td>Identifies the user who checked out the document.</td>
</tr>
<tr>
<td><strong>Status</strong></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>

---

**Element Description**

- **Available Fields**: Lists fields available for display in the Managed Attachments page. 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 page. 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.
- **Apply**: Click to preview your changes in the Managed Attachments page. If needed, temporarily reposition the Configure Fields for Display page to view page changes.
- **Save And Exit**: Click to save changes to the display configuration and return to the Managed Attachments page.
- **Reset**: Click to cancel any changes and restore the default display settings.
Use this page 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 page, click the **Info** icon for a selected attachment in the Managed Attachments Page, then choose **Update** from the Content Actions menu on the Content Information Page.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</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 <strong>Delete</strong> 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.</td>
</tr>
<tr>
<td>E-mail</td>
<td>Click the <strong>Send Link by E-mail</strong> link to open a new e-mail message that contains a URL to the selected document.</td>
</tr>
</tbody>
</table>

**B.5 Info Update Form**

Use this page 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 page, click the **Info** icon for a selected attachment in the Managed Attachments Page, then choose **Update** from the Content Actions menu on the Content Information Page.
B.6 Scan Document Page

Use this page to specify the type of document to scan or import, and then attach to the business application entity.

To display this page, click the Scan button in the Managed Attachments Page.

<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 Share Document, the document becomes available to users who have permission to this group.</td>
</tr>
<tr>
<td></td>
<td>- If you left Share Document 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 on this page.</td>
</tr>
</tbody>
</table>
B.7 Expanded Search Form

Use this page 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 Page.

To display this page, click the From Repository button in the Managed Attachments Page. 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>
</tbody>
</table>
| 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:  
  - Release Date (default)  
  - Title                    |
| Search Forms    | Switch between the expanded and query builder search forms.                |
| Search          | Click to perform the search using the selected search criteria.             |
| Reset           | Restores the page to its default settings.                                 |
B.8 Search Results Page

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

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

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

To display this page, click the From Repository or Search Within button in the Managed Attachments Page, 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>