Oracle® Fusion Middleware

Using the Application Adapters for Oracle WebCenter

12*c* (12.2.1.3.0)

E80986-01

July 2017

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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Oracle Fusion Middleware Using the Application Adapters for Oracle WebCenter, 12*c* (12.2.1.3.0)

E80986-01

Contents

Preface

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

Audience

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

Documentation Accessibility

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

Access to Oracle Support

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

Related Documents

The complete Oracle WebCenter Content documentation set is available from the Oracle Help Center at http://www.oracle.com/pls/topic/lookup?ctx=fmw122130&id=wccdocs.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.

Convention	Meaning
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

What's New in This Guide

Oracle WebCenter Application Adapters enable improved document image processing and attachment solutions.

This chapter contains the following topic:

- Significant Documentation Changes for 12c (12.2.1.3.0)

- New and Changed Features in 12c (12.2.1.2.0)

Significant Documentation Changes for 12c (12.2.1.3.0)

Following is the significant change in 12*c* (12.2.1.3.0) release:

- Imaging references as Oracle Imaging and Process Management (IPM) is available in 12*c* (12.2.1.3.0). See How do I view document images in the Imaging viewer? and Task Viewer Windows.

New and Changed Features in 12c (12.2.1.2.0)

Oracle WebCenter Application Adapter 12*c* (12.2.1.2.0) does not contain any new or changed features.

1

Solutions Overview

With Application Adapters for Oracle WebCenter, you can configure business application solutions such as Imaging Solution and Managed Attachments Solution to easily access, view, and act on your business transactions.

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:

- Imaging Solution Overview

- 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 Keying Entries From Images.

- Perform actions related to the workflow task, such as routing, canceling, updating, and completing tasks.

- Scan or upload supporting documents for a selected business application record.

- View supporting images for a business application record without leaving the business application.

1.1.1 Imaging Scenario 1: Processing Invoices

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

1. A workflow process automatically generates user tasks.

   An invoice is uploaded, metadata values are assigned, and a task for processing the invoice is generated. Typically, tasks are pooled into profiles from which groups of users select. You may have access to tasks in multiple profiles.

2. From your business application, you launch the invoices Imaging Solution, by selecting a command or clicking a link or button called **Process Invoices**.

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

4. In the Task Viewer, you view the task's invoice image, key entries in your business application based on the image, and perform related commands.

   Additional action commands are typically provided in a side panel. You might route the task to another user or group for approval, add comments for others to view, skip the task, or re-scan or delete the task's document.

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

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

1.1.1.1 Keying Entries From Images

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

1. From your business application's invoice entry 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.

2

Using the BPEL Imaging Solution

You can access the BPEL Imaging Solution from the business applications such as Oracle E-Business Suite or Oracle PeopleSoft. You can use the Task List and Task Viewer to perform various other tasks.

This chapter covers the following topics:

- Displaying the BPEL Imaging Solution From the Business Application

- Working with the BPEL Task List

- Performing BPEL Imaging Tasks

2.1 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

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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), then a command from the Zooms menu (for example, **Invoice Processing**), and click **OK**.

     For a document Imaging Solution, you can 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 How can I view and select tasks?.

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

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

2.2 Working with the BPEL Task List

Using the BPEL Task List you can view, select, release, sort, and search for tasks. You can also customize the Task List Display by hiding, reordering, or resizing columns.

This section includes the following topics:

- How can I view and select tasks?

- How are tasks automatically selected?

- How can I release a task?

- Can I customize the Task List display?

- How do I sort tasks in the Task List window?

- How do I search for tasks in the Task List window?

2.2.1 How can I view and select 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 How can I release a task?.

1. Start the Imaging Solution. See Displaying the BPEL Imaging Solution From the Business Application.

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.

2.2.2 How are tasks automatically selected?

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.

2.2.3 How can I release a task?

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**.

2.2.4 Can I customize the Task List display?

You can adjust the task list in the following ways:

- Hiding or Displaying Columns

- Reordering and Resizing Columns

- Detaching the Display

2.2.4.1 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.

2.2.4.2 Reordering and Resizing Columns

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

1. Display the Task List 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:

   • 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**.

2.2.4.3 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.

2.2.5 How do I sort tasks in the Task List window?

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 How are tasks automatically selected?.

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.

2.2.6 How do I search for tasks in the Task List window?

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

- You can search by Task Number, Title, Task ID, and text attribute fields. You cannot search in auto task mode.

- For some columns, you must enter the full value. For example, if searching by task number, you must enter the exact number. You can specify partial entries for other columns, such as Title or text attribute fields such as an Invoice Number column.

- Task searching is case insensitive.

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

2.3 Performing BPEL Imaging Tasks

Using BPEL Imaging you can view document images, customize the Task Viewer display, select users, groups, or items, and enter comments in the Task Viewer window.

This section includes the following topics:

- How do I view document images in the Imaging viewer?

- Can I customize the Task Viewer display?

- How do I select users or groups?

- How do I select items?

- How do I view and enter comments in the Task Viewer widow?

2.3.1 How do I view document images in the Imaging viewer?

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**.

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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 Viewing Documents in *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.

2.3.2 Can I customize 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 How do I view document images in the Imaging Viewer?.

- 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 How do I view and enter comments in the Task Viewer widow?.

- 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.

2.3.3 How do I select 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**.

2.3.4 How do I select 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.

2.3.5 How do I view and enter comments in the Task Viewer widow?

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 [icon] 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 [icon]. 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.

3

Using the Managed Attachments Solution

You can use the Managed Attachments solution to display the list of attachments from the business application and perform various other tasks such as search for attachments, check in and scan documents, and work with document revisions.

This chapter includes the following main sections:

- Viewing Attachments

- Attaching and Detaching Documents

- Editing Attachments

- Finding Attachments

For more information about Content Server procedures, see Working with Oracle WebCenter Content in *Using Oracle WebCenter Content*.

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

3.1 Viewing Attachments

Managed Attachments solution allows you to access documents in the Managed Attachments page or access the enhanced viewing options through AutoVue. You can also view the metadata values and document revisions.

This section includes the following topics:

- How do I display Managed Attachments in the business application?

- How do I view attached documents?

- How do I view documents in AutoVue?

- How do I configure fields to be displayed in the Managed Attachments page?

- How do I view information about a document?

3.1.1 How do I display 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.

> **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 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**.

   Figure 3-1   Managed Attachments from the Zooms menu
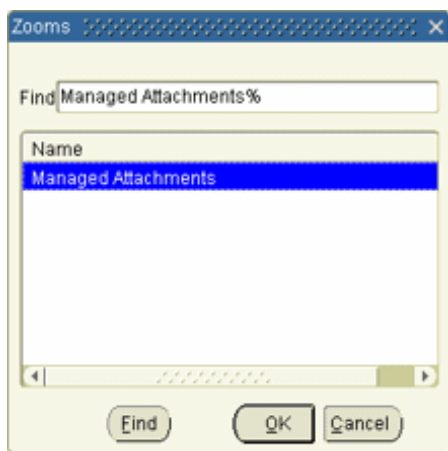
> **Note:**
>
> You may be prompted to enter a user name and password to log in to Content Server, depending on configuration. If prompted, enter the same user name that you use to log in to the business application.

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.

3.1.2 How do I view 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 How do I open or save a document?.

- Click the attachment's **Edit** icon under Actions options to make and save changes to the document. See How do I edit 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 How do I view information about a document?.

- Click the **AutoVue** icon (if displayed) to view the document in the AutoVue applet, which provides enhancing options such as annotation and markup. See How do I view documents in AutoVue?.

3.1.3 How do I view 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 How do I check in and attach a document to the application record?.

1. In the Managed Attachments page, click the **View in AutoVue** icon 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.

> **Note:**
>
> The AutoVue icon is dimmed (grayed out) for private attachments, which cannot be viewed using AutoVue.
>
> Viewing or annotating a document in AutoVue does not check it out or prevent it from being edited by others. Annotations are contained in a separate layer from their corresponding document.

2. Use AutoVue options to view, annotate, mark up, and print the document. Note that digital markups are saved in the Content Server repository and associated with the attached document.

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

3.1.4 How do I configure fields to be displayed in the Managed Attachments page?

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 .

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.

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

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

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

3.1.5 How do I view information about a document?

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.

3.2 Attaching and Detaching Documents

Managed Attachments solution allows you to check in, check out, scan, attach, and detach a document.

This section includes the following topics:

- How do I check in and attach a document to the application record?

- How do I check out documents or undo document check-outs?

- How do I scan using Oracle WebCenter Enterprise Capture?

- How do I scan using Oracle Distributed Document Capture?

- How do I attach documents from the Content Server repository?

- How do I detach a document from the application record?

3.2.1 How do I check in and attach a document to the application record?

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.

Figure 3-2   Check In Confirmation Message
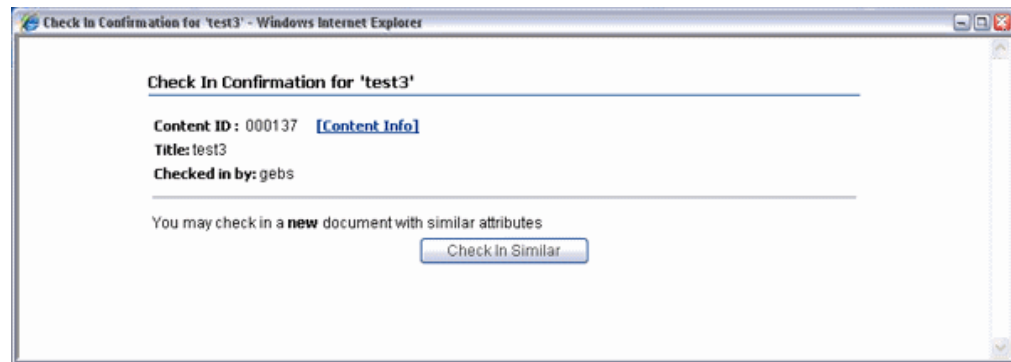
4. Close the Check-In Confirmation page.

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

3.2.2 How do I check out documents or undo document 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
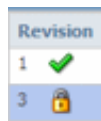
A green check mark icon is displayed in the Revision column (if shown) when a document is checked out by you.

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.

3.2.3 How do I scan using Oracle WebCenter Enterprise Capture?

The Managed Attachments page provides a Scan button that, when configured, launches the Oracle WebCenter Enterprise 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 Enterprise 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 Enterprise 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 3-3, 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 3-3, ready for you to review and index.

Figure 3-3   WebCenter Enterprise Capture Client Window
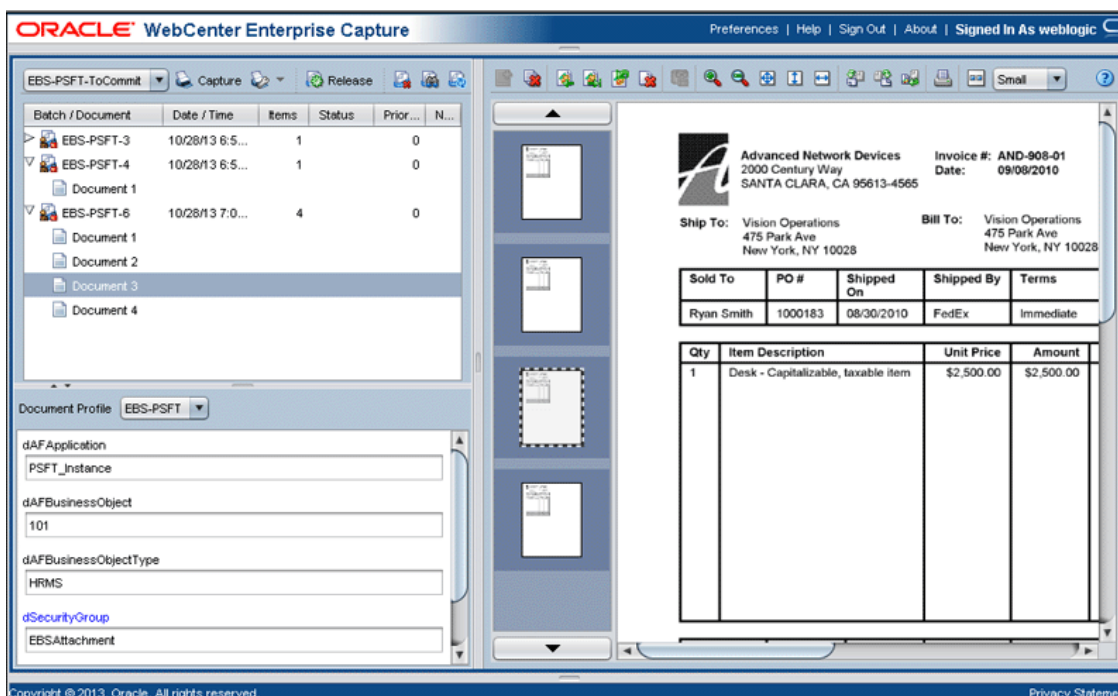
7. In the client window, review, edit, and index the document. For more information on indexing, see How does indexing work? in *Using Oracle WebCenter Enterprise Capture*. Follow these guidelines:

   - 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 Enterprise 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.

3.2.4 How do I scan 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.

   Figure 3-4   Review/Index window
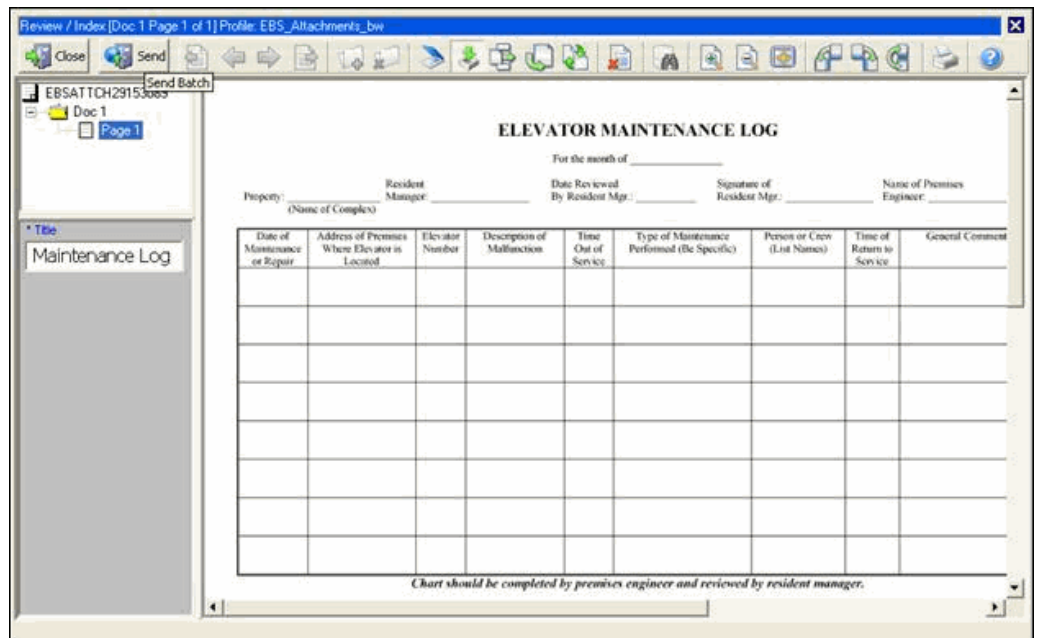
7. In the Review/Index window, review, edit, and index the document. For more information, see the *User's Guide for Oracle Distributed Document Capture.* Follow these guidelines:

   - 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.

3.2.5 How do I attach documents 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.

3.2.6 How do I detach a document from the application record?

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 How do I delete a document from the Content Server repository?.

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.

3.3 Editing Attachments

Managed Attachments solution allows you to save and edit a document, update the metadata of a document, work with document revisions, and also delete a document from the Content Server.

This section includes the following topics:

- How do I open or save a document?

- How do I edit a document in its native application?

- How do I update the metadata of a document?

- How do I work with document revisions?

- How do I delete a document from the Content Server repository?

3.3.1 How do I open or save 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 How do I edit a document in its native application?.

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**.

3.3.2 How do I edit 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.

3.3.3 How do I update the metadata of a document?

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.

### 3.3.4 How do I work 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
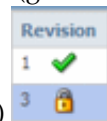
  (locked icon, hover to view user name) .

- 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
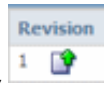
  arrow,) is displayed. To make the newest revision the attached revision, click the icon and choose **Update Attachment to This Revision** from the Content Actions menu on the Content Information page.

3.3.5 How do I delete a document from the Content Server repository?

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 How do I detach a document from the application record?.

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.

3.4 Finding Attachments

Managed Attachments solution allows you to search for documents in the Content Server and also within the attachments list.

This section includes the following topics:

- How do I search for documents from the Content Server repository?

- How do I search within the attachments list?

3.4.1 How do I search for documents from 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.

3.4.2 How do I search 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.

A

BPEL Imaging Solution Windows

Using the BPEL Imaging Solution user interface window, you can select and edit task, and also select items, users, and groups.

The Imaging Solution includes the following windows:

- Task List Window

- Task Viewer Windows

- Select Item Window

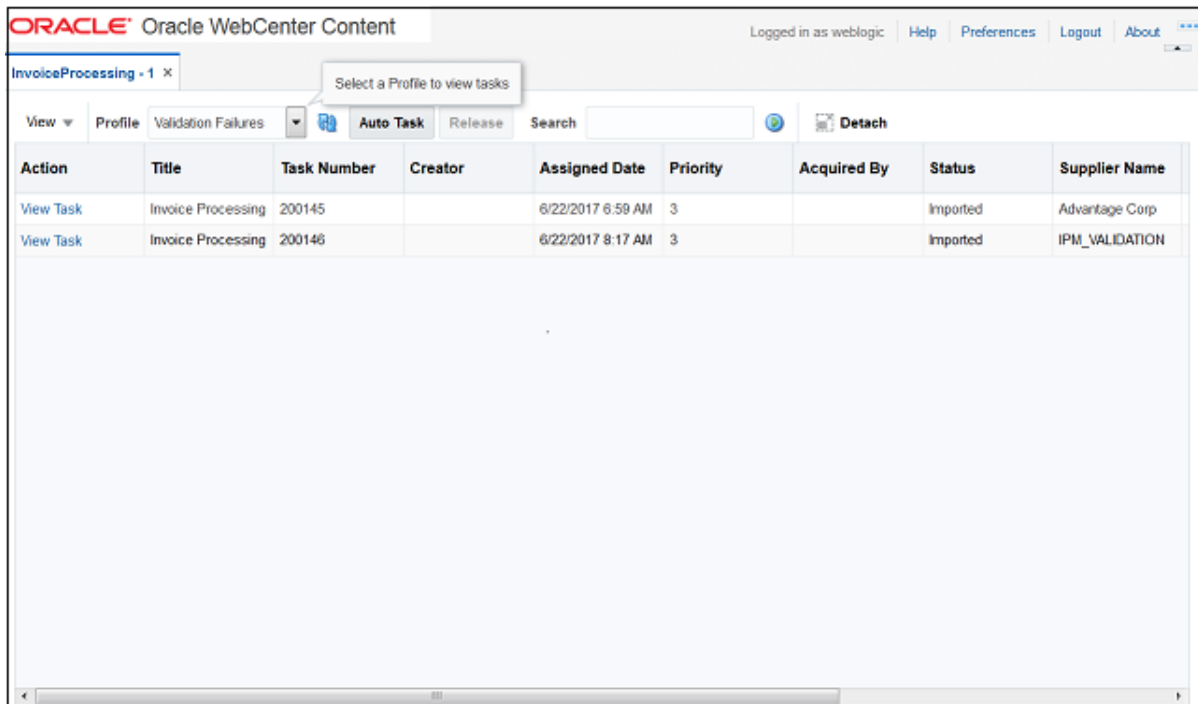- Select User/Group Window

---

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.

Figure A-1   Task List Window

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.

Note:

To sort the task list, hover your cursor over a column heading, and click one of the sort options that displays (a triangle for sorting in ascending order or an inverted triangle for sorting in descending order).

Element	Description
Task List Links	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.
View	Use this menu to reorder columns, hide or display columns, or detach the task list to a floating window.
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.

Element	Description
Auto Task	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.
Release	Click to make a previously selected task available to all users assigned its profile.
	Note: When you select a task, it becomes acquired by you, until you either complete or release it. If you close your browser without completing a task, the task remains listed in your task list when you next view it.
Search	Search for a specific task by entering the value to find in the search entry field and clicking the adjacent search button.
Detach	Click to expand the task list to a floating window you can reposition. To attach, click **Detach** 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 Task Viewer wndows.

A.2 Task Viewer Windows

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

Figure A-2   Task Viewer Windows
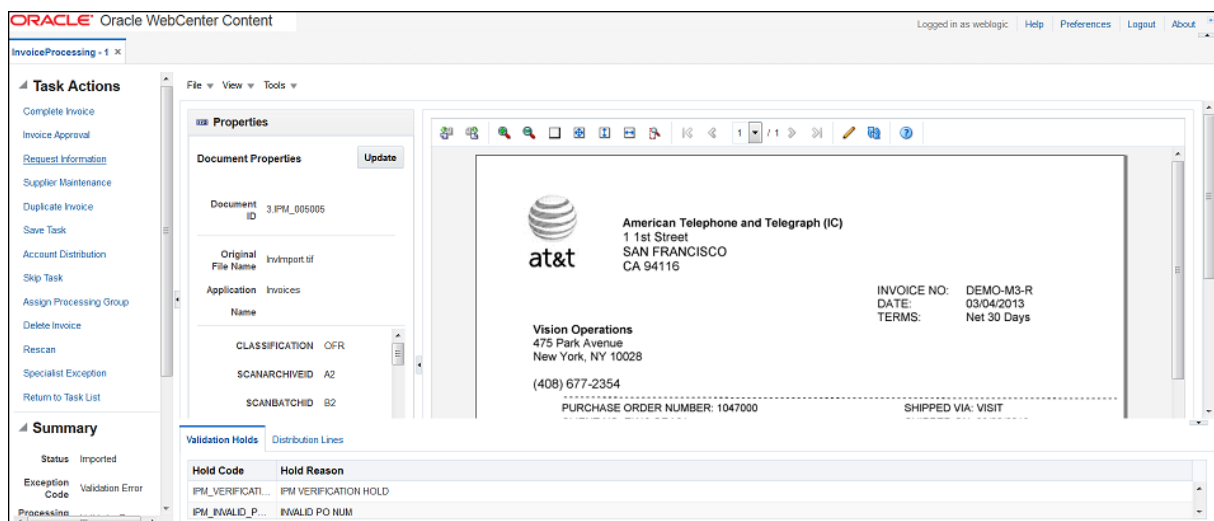
Display this window from the Task List Window in one of two ways: by clicking a specific task's **View Task** link or by clicking **Auto Task**.

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 Imaging 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.
Imaging Viewer	Displays the task's associated images in basic or advanced Imaging viewer mode. For more information about the Imaging viewer, see Viewer in *Using Oracle WebCenter Content: Imaging*.

A.3 Select Item Window

Use this window to select an item from a list of choices.

Figure A-3   Select Item Window
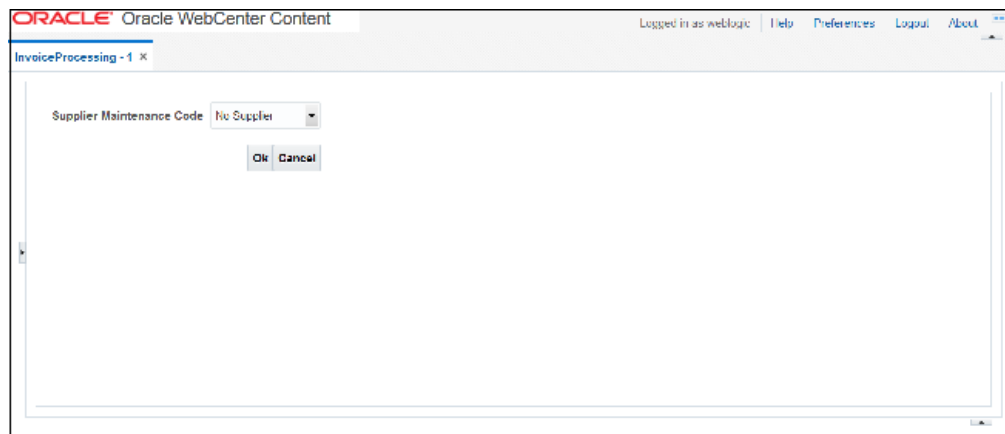
Display this window by choosing a command requiring a selection. For example, clicking an action command called **Supplier Maintenance** on the Task Viewer window might display the Select Item window containing the supplier code values.

Element	Description
Item Selector	From the field listing choices, select an item and click **OK**.
OK	Exit the window and use the selection made.
Cancel	Exit the window, discarding any selection made.

A.4 Select User/Group Window

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

Figure A-4   Select User/Group Window
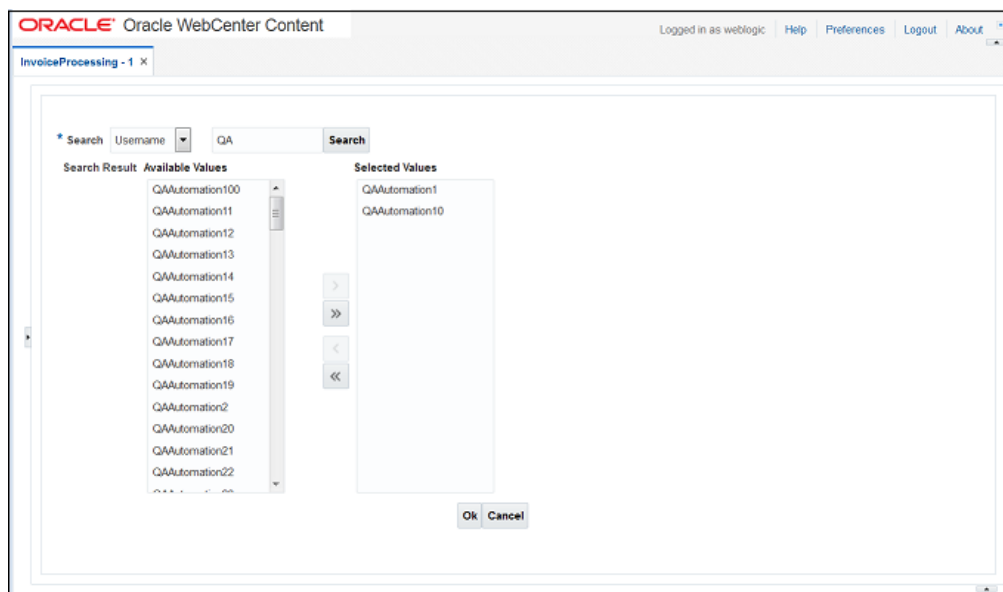
Display this window by selecting a command requiring a user or group selection. For example, clicking an action command called **Approval** on the Task Viewer Windows might display the Select User/Group window for selecting a group to request approval for a selected document.

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 *Ols* 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 **Search**. Select users from this list by clicking them and clicking **Move** or **Move All**.
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.

Element	Description
Cancel	Exit this window without selecting users or groups.

B

Managed Attachments Pages

Using the Managed Attachments user interface pages, you can view, check in, scan, edit, and search for attachments.

The Managed Attachments solution includes the following pages:

- Managed Attachments Page

- Content Check-In Form

- Configure Fields for Display Page

- Content Information Page

- Info Update Form

- Scan Document Page

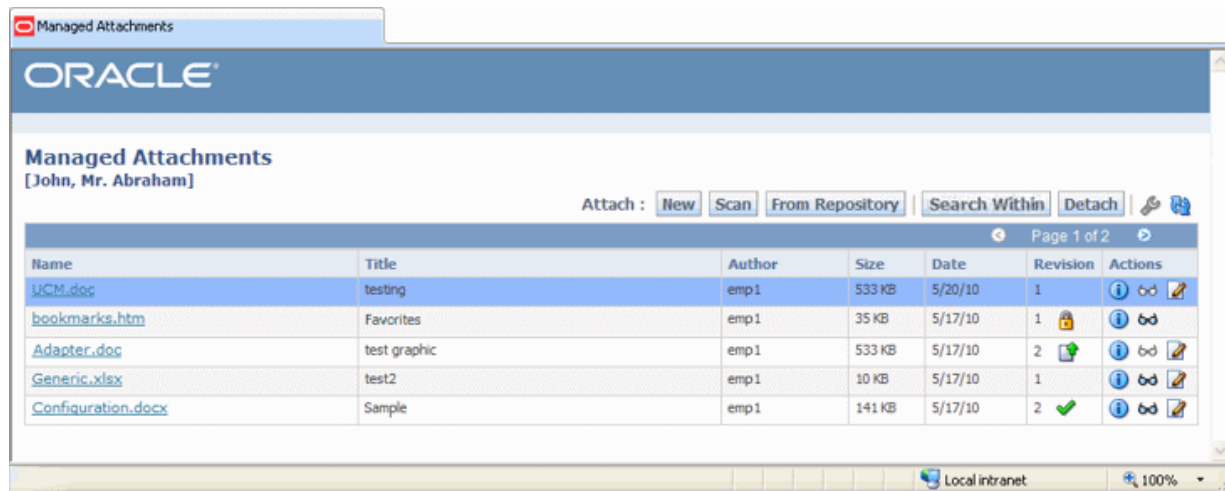- Expanded Search Form

- Search Results Page

> **Note:**
>
> For more information about Content Server pages, see Working with Oracle WebCenter Content in *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.

Figure B-1   Managed Attachments

Element	Icon or Button	Description
Name		Lists the native name (including extension) of each Content Server document attached to the business application record. Click the document's link to open or save a Web-viewable rendition of the document.
Title		Displays the title of the attached Content Server document, assigned at check-in.
Author		Identifies the person who last checked in the file.
Size		Displays the size (KB/MB) of the attached Content Server document.
Date		Displays the date on which the Content Server document was last checked in to Content Server.
Revision		Displays information about the attached revision. Depending on configuration, some items may not be shown. • **Number:** Indicates the revision number of the attachment. • **Checked Out by Me** icon (check mark): Indicates that the attachment is checked out by you. Click this icon to display the Content Information Page, and check in or undo the check-out. • **Checked Out By** icon (lock): Indicates that the attachment is checked out by another user. Hover the cursor over the icon to view the name of the user who checked out the attachment. • **Newer Revision Available** icon (page with up arrow): Indicates that a newer revision exists than the one attached. Click this icon to display the Content Information Page, and if needed, make the more recent revision the attached revision.
Info		Click this icon to display detailed information and content actions for the selected document on the Content Information page.

Element	Icon or Button	Description
View inAutoVue		Click this icon to view, print, collaborate, annotate, and mark up non-private (shared) attachments in the AutoVue document viewer, if configured. The AutoVue icon is dimmed (grayed out) for private attachments, which cannot be viewed using AutoVue.
Edit		Click this icon to check out, open, and edit the attached Content Server document in its native application.
New		Click to attach a document to the selected business application record, by completing fields on the Content Check-In Form.
Scan		Click to scan or import a document and attach it to the business application record.
From Repository		Click to search for files on the Content Server and attach them to the business application record.
Search Within		Click to search within the Managed Attachments list on the Expanded Search Form.
Detach		Click to detach the selected document. Detaching removes the document from the business application entity, but not from Content Server.
Configure		Click to select and order fields for display in the Managed Attachments page using the Configure Fields for Display Page.
Refresh		Click to update the Managed Attachments page.

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.

Figure B-2   Content Check-In Form

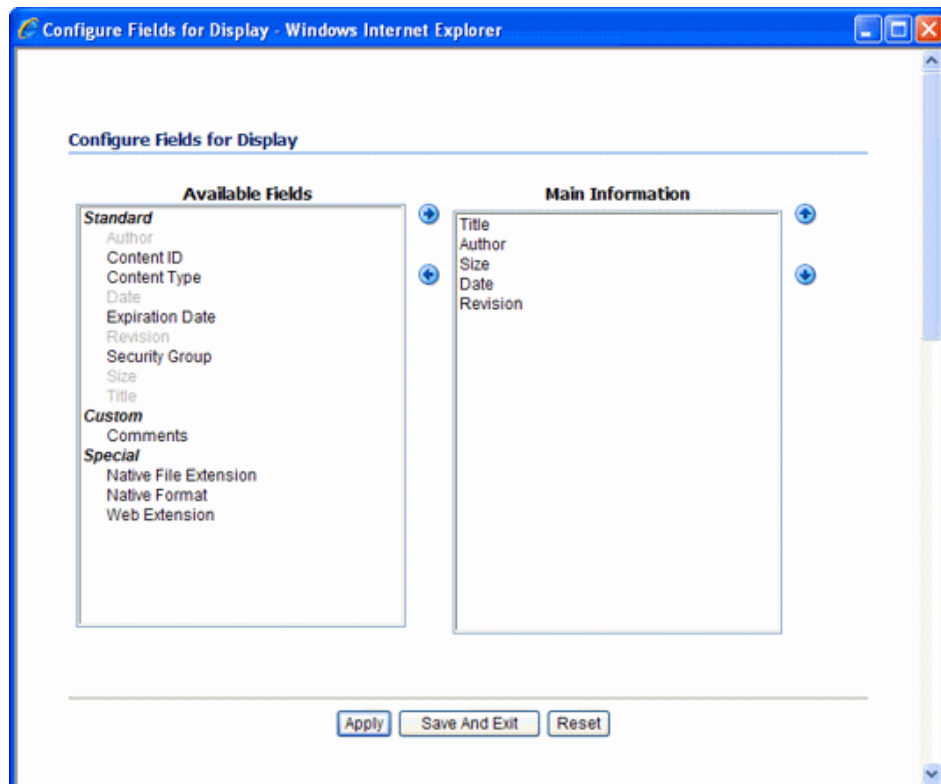To display this page, click the **New** button in the Managed Attachments page.

Element	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 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.
Security Group	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.
Primary File	Specify a primary file using one of these methods: • Click **Browse** next to the field. Navigate to and select the native file, and then click **Open**. • 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.
Comments	Enter any notes about the file.
Check In	Click to check in the specified document using the settings selected on this page.

Element	Description
Reset	Click to cancel any entries and restore the default settings on this page.

B.3 Configure Fields for Display Page

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

Figure B-3   Configure Fields for Display

To display this page, click the **Configure** button in the Managed Attachments page.

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.

Element	Description
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.

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.

Figure B-4   Content Information
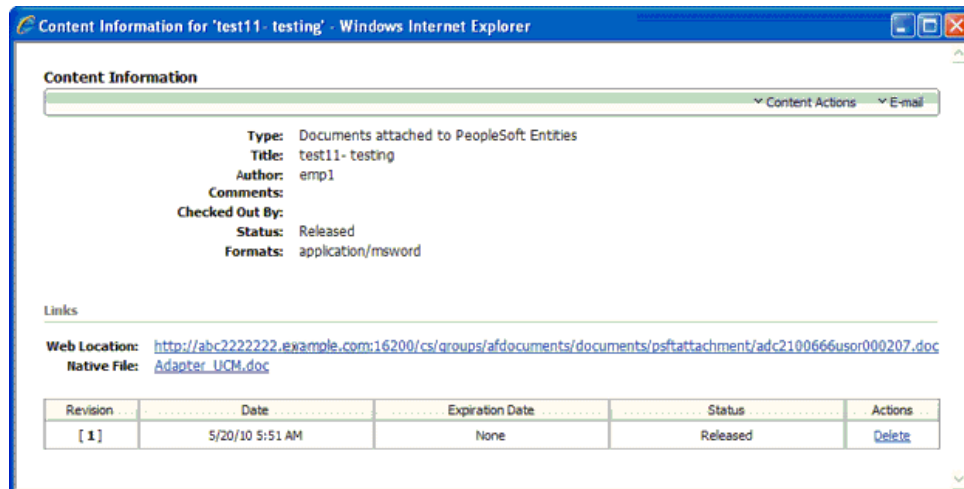
To display this page, click the **Info** button shown below for a selected attached document in the Managed Attachments page.

Element	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.

Element	Description
Status	Identifies the document's current status. A status of *Released* 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.
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 **Delete** 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 page after clicking the **Newer Revision Available** icon on the Managed Attachments page, an additional command is available: Choose **Update Attachment to This Revision** to make the newer revision the attached version.
E-mail	Click the **Send Link by E-mail** link to open a new e-mail message that contains a URL to the selected document.

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.

Figure B-5   Info Update Form

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.

Element	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.
Share Document	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.
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 displaying this 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.

Figure B-6   Scan Document

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

Element	Description
Document Classification	Identify the type of document to be scanned or imported.

Element	Description
Share Document	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.
Security Group	Select a group for the document. • If you selected **Share Document**, the document becomes available to users who have permission to this group. • If you left **Share Document** deselected, selecting a security group is not needed; this field is grayed out.
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 on this page.

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.

Figure B-7   Expanded Search Form

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.
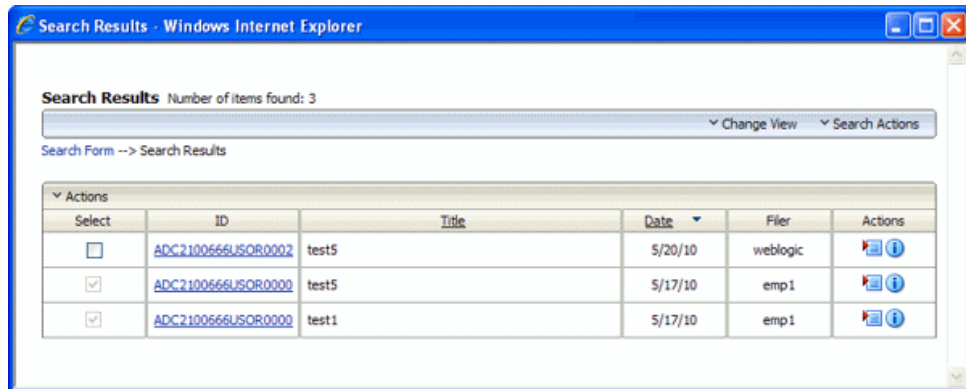
Element	Description
Title	Select an operator and enter a document title.
Type	Select an operator and select a document type.
Security Group	Select an operator and search for the document's security group. To search for private documents, select **AFDocuments** as the security group.
Author	Select an 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: • 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.

Figure B-8   Search Results

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**.

Element	Description
Select	Select one or more documents to attach. A dimmed box is displayed if a document is already attached to the business application record.
Actions	To attach the selected documents to the business application record, choose **Attach to current Application Entity**.
Change View	Select another Content Server results view.