

Oracle® Fusion Middleware

Using the Siebel Application Adapter for Oracle WebCenter

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Introduction

This document provides information on options available to Siebel users in the Managed Attachments IFrame configured through the Oracle Siebel adapter. This book is a new edition of the formerly titled *Oracle WebCenter User's Guide for Siebel Application Adapter*.

It includes the following sections:

- [Siebel Managed Attachments Solution Overview](#)
- [Using the Managed Attachments Solution](#)
- [Managed Attachments Solution User Interface](#)

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=fmw122120&id=wccdocs>.

Siebel Managed Attachments Solution Overview

The Oracle Siebel Adapter for Oracle WebCenter allows Siebel CRM users to work with document attachments stored in an Oracle WebCenter Content Server repository. Content Server documents are displayed as attachments to Siebel entities in a customizable Managed Attachments IFrame within the Siebel application.

Use the IFrame to view, attach, scan, detach, filter, and edit Content Server documents attached to the selected Siebel record, as shown in the following figure. You can also launch the Content Server application, and activate its search options to locate Content Server documents to which you have access.

Managed Attachments									
New Scan Detach Refresh Page Advanced Search Configure Filter									
Name	Title	Date	Author	Size	Comments	Content Type	Info	Edit	Properties
2650_001.pdf	PSFTtest	3/3/11	weblogic	114 KB	psft test	PSFTAttachment			
2650_001.pdf	testbinary	3/3/11	weblogic	114 KB	binary test	Binary			
2011_001.pdf	test3	2/21/11	weblogic	175 KB		SiebelAttachment			
2109_001.pdf	PSFT1	2/21/11	weblogic	1 MB	PSFT	PSFTAttachment			
strings.txt	binary2	2/21/11	weblogic	1 KB	binary 2	Binary			
problem.txt	binary1	2/21/11	weblogic	1 KB	binary	Binary			
core	test2	2/18/11	weblogic	34 MB	test 2	SiebelAttachment			
login.htm	vinitku2	2/16/11	weblogic	6 KB		SiebelAttachment			
problem.txt	test1	2/14/11	weblogic	1 KB	test1	SiebelAttachment			

The Managed Attachments Solution provides document attachment capabilities through Oracle WebCenter Content Server. Depending on configuration, use the Managed Attachments Solution for tasks such as the following:

- View attached documents and metadata values without leaving the Siebel application.
- Use Content Server's tools for finding, viewing, and editing documents.
- Scan or upload supporting documents for the selected Siebel record.

Using the Managed Attachments Solution

This section describes how to perform the following tasks using the Managed Attachments IFrame and its screens:

- [How can I display the Managed Attachments Solution?](#)
- [How do I filter displayed attachments?](#)
- [How do I check in and attach a document?](#)
- [How do I detach a document?](#)
- [How do I configure fields to be displayed in the Managed Attachments IFrame?](#)
- [How do I view information about a document?](#)
- [How do I edit a document in its native application?](#)
- [How do I open or save a document?](#)
- [How do I update the metadata of a document?](#)
- [How do I attach a Content Server document to multiple Siebel records?](#)

- [How do I delete a document from the Content Server repository?](#)
- [How do I search for documents from the Content Server repository?](#)
- [How do I scan using Oracle WebCenter Enterprise Capture?](#)
- [How do I scan using Oracle Distributed Document Capture?](#)

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

How can I display the Managed Attachments Solution?

Follow these steps to display the Managed Attachments Solution:

1. Display a supported Siebel record.
2. Click the Attachments tab.

The Managed Attachments IFrame is displayed, listing documents associated with the selected record.

If there are no documents attached to the selected Siebel record, the Managed Attachments list is empty until you add one by attaching (see [How do I check in and attach a document?](#)) or scanning (see [How do I scan using Oracle Distributed Document Capture?](#)).

How do I filter displayed attachments?

Follow these steps to filter and refine the list of documents displayed in the Managed Attachments IFrame:

1. Click **Filter**.

The Attachment Filter page is displayed.

2. Enter the criteria used to filter the displayed documents in the [What is Attachment Filter Page?](#) and click **Filter Results**.

The Attachment Filter page closes and the documents listed in the Managed Attachments IFrame is refined based on the entered criteria.

How do I check in and attach a document?

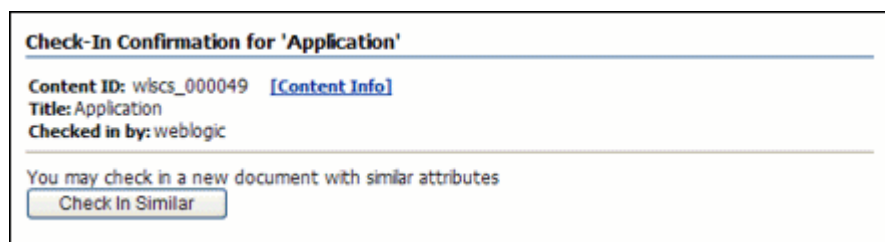
Follow these steps to check in a document and attach it to the selected Siebel record:

1. In the Managed Attachments IFrame, click **New**.
2. Complete the fields on the [What is Content Check In Form?](#).

Specify the file to attach in the **Primary File** field by clicking the **Browse** button and selecting a file.

3. Click **Check In**.

Content Server options are displayed and a message confirms that the document was checked in. The **Check In Similar** button enables you to check in another document using the same metadata values.



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

How do I detach a document?

Follow these steps to detach a document from the selected Siebel record. Detaching a document removes the link to the Siebel 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. In the Managed Attachments IFrame, select the row corresponding to the attachment you want to detach from the selected Siebel record.
2. Click **Detach**.
3. When prompted 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 in the IFrame.

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

Follow these steps to select and order fields for display in the Managed Attachments IFrame:

1. In the Managed Attachments IFrame, click **Configure**.
2. On the [What is Configure Fields for Display screen?](#), specify fields to display by selecting them in the Available Fields area (holding down the Ctrl key to select multiple fields) and clicking the right arrow button to move them to the Main Information area. (Fields selected for display are displayed in dimmed text in the Available Fields area.)
3. Change the order in which fields are displayed by repositioning them in the Main Information area. Move a field by selecting it and clicking the up or down arrow button.

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

4. Click **Apply** and view the IFrame to see the results of your changes.
5. When done, click **Save and Exit**, and close the Configure Fields for Display screen.

How do I view information about a document?

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

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

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. In the Managed Attachments IFrame, 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. 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.

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. In the Managed Attachments IFrame, 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**.

How do I update the metadata of a document?

Follow these steps to make changes to a selected document's metadata values:

1. In the Managed Attachments IFrame, click the **Properties** icon for a selected attachment.
2. Make changes to the document's metadata values on the [What is Info Update Form?](#).

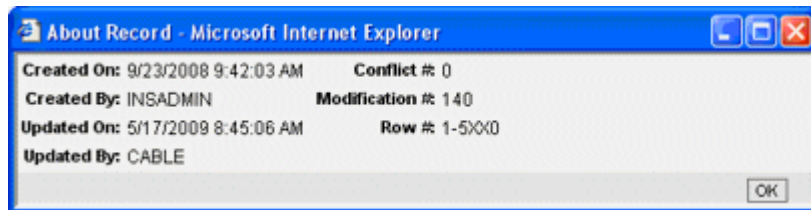
3. Click **Submit Update**.

How do I attach a Content Server document to multiple Siebel records?

You can attach a single Content Server document to multiple Siebel records. For example, you might attach a legal document to several contacts from the same organization. To do so, you must first attach the Content Server document to a Siebel record and then manually add the record keys of additional Siebel records to link them with the Content Server attachment.

1. Note the key for each Siebel record you want to link to the Content Server document.

To find a record's key in the Siebel application, right-click the title bar of the Siebel record's primary pane and choose **About Record**. In the dialog box displayed, note the key listed after **Row #**.



2. On the Managed Attachments IFrame, click the **Properties** icon for the Content Server document.
3. Under **Attach to Siebel Entities** fields on the Info Update form, enter a Siebel record key in the field corresponding to the record's type, and click the green plus sign. (For example, for a contact record, enter a Siebel record key in the Contact field and click its plus sign.) Repeat this step to link additional Siebel records to the attachment.

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 Siebel record. To detach a document only (remove its link to the selected Siebel record without deleting it from the Content Server), see [How do I detach a document?](#)

1. In the Managed Attachments IFrame, click the **Info** icon for a selected attachment.
2. Under Actions options, click the **Delete** link for the revision you want to delete. When prompted, confirm the deletion.

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

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

1. In the Managed Attachments IFrame, click **Advanced Search**.
2. Specify search criteria on the [What is Expanded Search Form?](#)

By default, the search is limited to attachments to the selected Siebel record. If viewing a Siebel contact record, for example, the Siebel entity value is displayed in the Contact field. To widen the search beyond documents attached to the selected Siebel record, remove the Siebel entity identifier.

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

3. Click **Search**. Search results are listed.

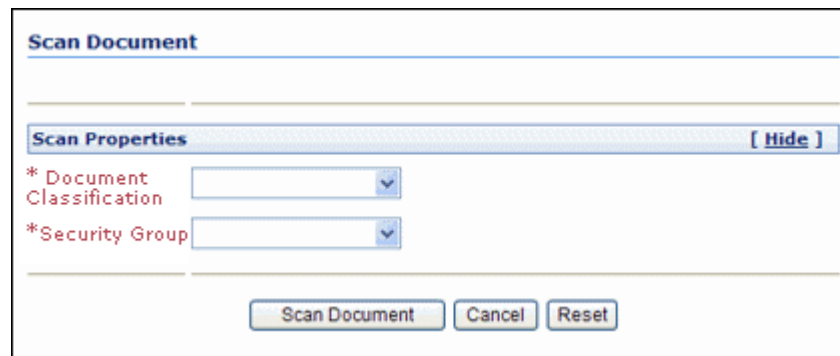
Note: Depending on the IFrame configuration, you may have full or limited access to Content Server and its features. For more information about its features, click the **quick help** link or see the Content Server documentation.

How do I scan using Oracle WebCenter Enterprise Capture?

The Managed Attachments IFrame 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 (image or non-image file such as PDF or Microsoft Word document). After reviewing, editing, and indexing the document, click **Release**, which transfers it from Oracle WebCenter Enterprise Capture to Content Server and attaches it to the selected Siebel 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. In the Managed Attachments IFrame, click **Scan**. The Scan Document screen is displayed.

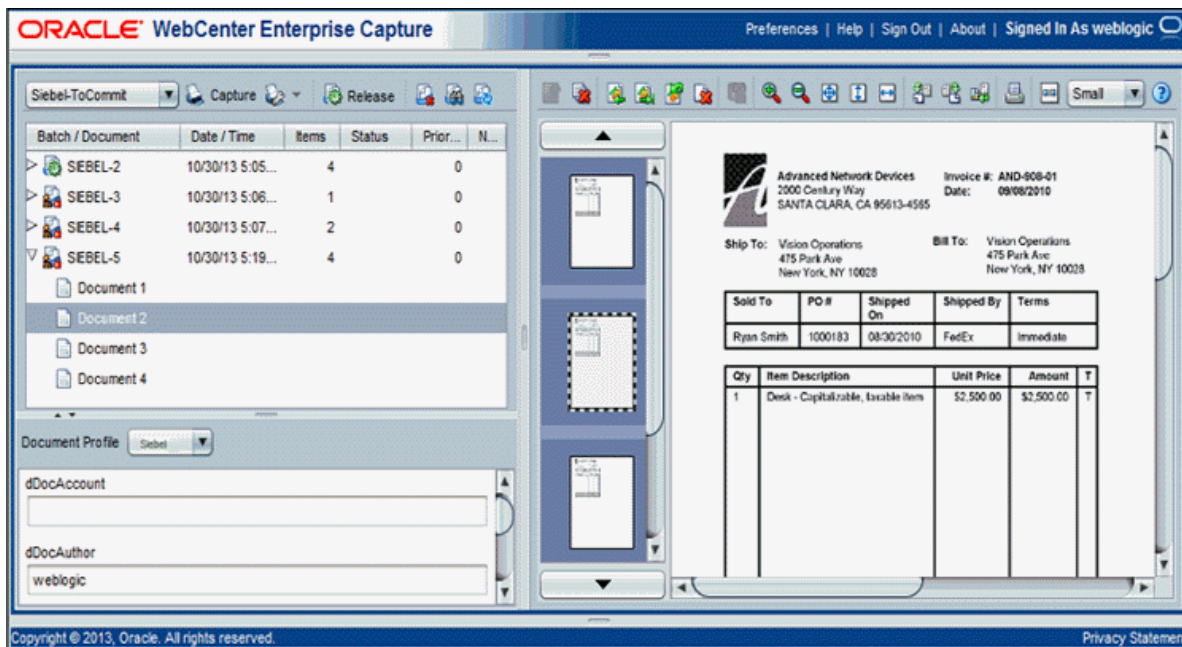


3. Select a classification from the **Document Classification** drop-down list.

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 a security group from the **Security Group** drop-down list.
5. Click **Scan Document**. 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 in the Document pane as shown in the following figure, ready for you to review and index.
- If set for importing, a File Import screen 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 in the Document pane as shown in the following figure, ready for you to review and index.



6. In the Document pane, review and edit the document. For more information, see *Reviewing and Editing Documents* chapter in *Using Oracle WebCenter Enterprise Capture*.
7. In the Metadata pane, select a document profile that you want to apply to the document. For example, if you want to index a customer order document, you might select a document profile with Customer Number, Customer Name, and Order metadata fields. For more information, see *Indexing Documents* chapter in *Using Oracle WebCenter Enterprise Capture*. Follow these guidelines:
 - Metadata fields provide values that are stored as metadata with the Content Server document. An asterisk before the name of the metadata field indicates a required field.
 - All pages in a document have the same metadata values. Indexing one page of a document indexes all the other pages in the document.
8. When done, click **Release** to commit the document to the Content Server and attach it to the Siebel record. When prompted to confirm the release of the batch, click **Yes**.

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.

The icon of the batch changes to show a processing state and then the batch disappears from the batch pane.

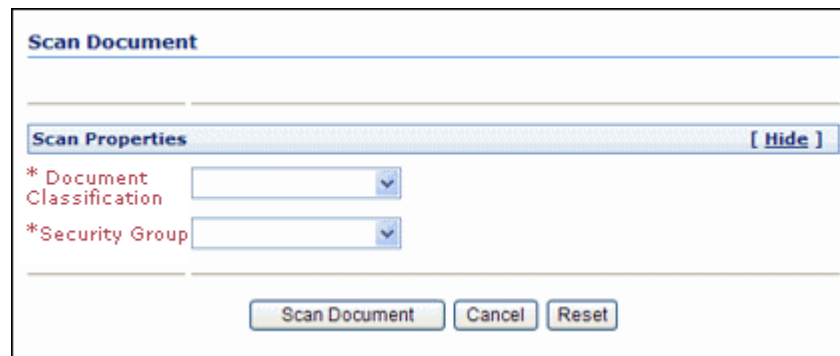
9. In the Managed Attachments IFrame, click **Refresh** to display the newly scanned or imported document now attached to the selected Siebel record. Note that it may take a few minutes for the generated document to be displayed.

How do I scan using Oracle Distributed Document Capture?

The Managed Attachments IFrame 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 **Send**, which transfers it from Oracle Distributed Document Capture to Content Server and attaches it to the selected Siebel 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. In the Managed Attachments IFrame, click **Scan**. The Scan Document screen is displayed.

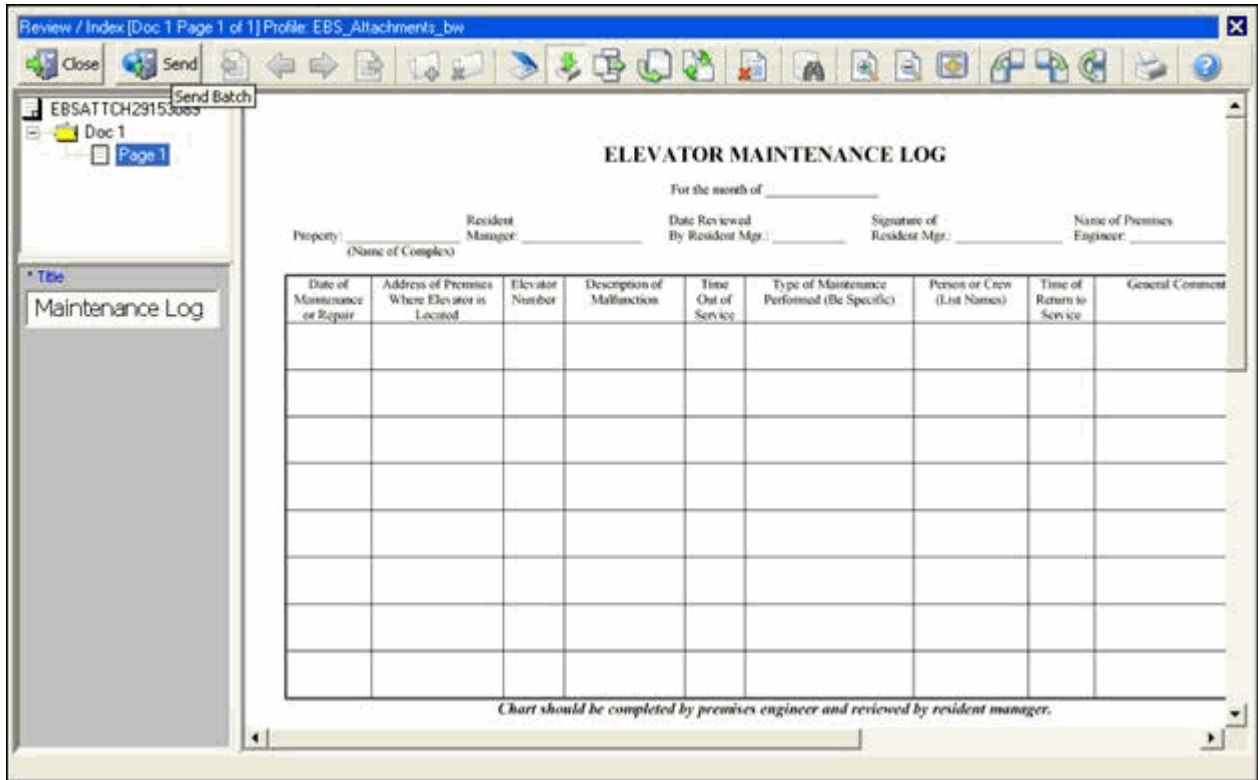


3. Select a classification from the **Document Classification** drop-down list.

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. Click **Scan Document**. The Oracle Distributed Document Capture client application launches and displays options based on whether the selected document classification is configured for scanning or importing.
 - If set for *scanning*, the scanner scans the pages you placed in the feeder and displays them in the Review/Index screen as shown in the following figure, ready for you to review and index them. (All pages are scanned and stored in one document in the batch.)

- If set for *importing*, a File Import screen is displayed, prompting you to select one or more scanned image files to import. After you select files, their pages are displayed in the Review/Index screen as shown in the following figure, ready for you to review and index. (All files are imported into a single document in a single batch.)



5. In the Review/Index screen, 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 you 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.
6. When done, click **Send** to transfer the document to Content Server and attach it to the Siebel record. When prompted to confirm sending the batch, click **Yes**.

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

The client displays batch send results.

7. Close the Batch Send Results and Oracle Distributed Document Capture screens.
8. In the Managed Attachments IFrame, click **Refresh** to display the newly scanned or imported document now attached to the selected Siebel record. Note that it may take a few minutes for the generated document to be displayed.

Managed Attachments Solution User Interface

The Adapter screens include:

- [What is Managed Attachments IFrame?](#)
- [What is Attachment Filter Page?](#)
- [What is Content Check In Form?](#)
- [What is Configure Fields for Display screen?](#)
- [What is Content Information screen?](#)
- [What is Info Update Form?](#)
- [What is Scan Document screen?](#)
- [What is Expanded Search Form?](#)

What is Managed Attachments IFrame?

Use the Managed Attachments IFrame to view, attach, scan, detach, and edit Content Server documents attached to the selected Siebel record. You can also launch the Content Server application, and activate its search options to locate Content Server documents to which you have access.

The Managed Attachments IFrame is displayed within the Siebel record. It lists all Content Server documents attached to the selected Siebel record, and provides the options listed in the table below.

Managed Attachments									
Name	Title	Date	Author	Size	Comments	Content Type	Info	Edit	Properties
2650_001.pdf	PSFTtest	3/3/11	weblogic	114 KB	psft test	PSFTAttachment			
2650_001.pdf	testbinary	3/3/11	weblogic	114 KB	binary test	Binary			
2011_001.pdf	test3	2/21/11	weblogic	175 KB		SiebelAttachment			
2109_001.pdf	PSFT1	2/21/11	weblogic	1 MB	PSFT	PSFTAttachment			
strings.txt	binary2	2/21/11	weblogic	1 KB	binary 2	Binary			
problem.txt	binary1	2/21/11	weblogic	1 KB	binary	Binary			
core	test2	2/18/11	weblogic	34 MB	test 2	SiebelAttachment			
login.htm	vinitku2	2/16/11	weblogic	6 KB		SiebelAttachment			
problem.txt	test1	2/14/11	weblogic	1 KB	test1	SiebelAttachment			

About the IFrame

- The default columns are described in the following table, although you can customize the columns displayed by clicking **Configure**, as described in [How do I configure fields to be displayed in the Managed Attachments IFrame?](#).
- If the list of attachments is long, arrows for displaying previous and next pages are displayed at the bottom.
- 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 or descending order.
- Depending on settings, some functionality described in this section may not be available. For example, some buttons may not be displayed or some icons may be disabled (grayed out).

Elements	Description
Name	Lists the native name (including extension) of each Content Server document attached to the Siebel 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 checkin.
Author	Identifies the person who checked in the file.
Size	Displays the size (KB/MB) of the attached Content Server document.

Elements	Description
Date	Displays the date on which the Content Server document was last submitted to Content Server.
Info	Click this icon to display detailed information and content actions for the selected document on the What is Content Information screen?
Edit	Click this icon to check out, open, and edit the attached Content Server document in its native application.
Properties	Click this icon to update metadata values for the attached Content Server document on the What is Info Update Form?
New	Click this button to attach a Content Server document to the selected Siebel record, by completing fields on the What is Content Check In Form?
Scan	Click this button to scan or import a document and attach it to the Siebel record, as described in How do I scan using Oracle Distributed Document Capture?
Detach	Click this button to detach the selected Content Server document. Detaching removes the Content Server document from the Siebel entity, but not from Content Server.
Refresh	Click this button to update the Managed Attachments IFrame display.
Advanced Search	Click this button to search for files on the Content Server.
Configure	Click this button to select and order fields for display in the Managed Attachments IFrame on the How do I configure fields to be displayed in the Managed Attachments IFrame?
Filter	Click to display the What is Attachment Filter Page? used to specify criteria for refining the displayed attachments.
Filter (active)	The label of the Filter button changes to Filter (active) when the displayed attachments have been filtered based on criteria entered on the What is Attachment Filter Page? . Clicking the Filter (active) button displays the Attachment Filter page where new criteria can be entered and applied.
Cancel Filter	Click to display the full list of attachments, clearing any criteria used to filter the results. When canceled, the Filter (active) button label changes back to Filter .

What is Attachment Filter Page?

Use the Attachment Filter Page to specify criteria to limit the list of attachments displayed in the Managed Attachments IFrame.

To display this page, click **Filter** in the [What is Managed Attachments IFrame?](#)

Elements	Description
Document Type	Select the type of document or documents you want to display from the list of available types. Select multiple types by holding down the Ctl key and clicking each type (Ctl + click).
File Name	Enter a name or partial name to narrow the list to documents whose file name contains these characters. For example, entering Rec will display documents <i>Record1</i> , <i>Record2</i> , and <i>Record3</i> as well as <i>Receipt1</i> and <i>Receipt2</i> . The file name filter is case sensitive.
Author	Enter an author name to narrow the list to documents this author checked in.
Comments	Enter text to narrow the list to documents containing this comments text.
Security Group	Select a security group to narrow the list to documents assigned this group.
Modified Between	Click the calendar icons and select dates to narrow the list to documents modified during the date range you specify.
Reset Filter	Click to reset selected filter options and clear any criteria entered in text fields.
Filter Results	Click to close the Attachment Filter page and display the filtered results in the Managed Attachments IFrame.

What is Content Check In Form?

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

Siebel Attachment Content Check-In Form

* Type: Documents attached to Siebel Entities

* Title: [Empty text box]

* Author: weblogic

* Security Group: Public

* Primary File: [Empty text box] Browse...

Alternate File: [Empty text box] Browse...

Metadata [Hide]

Comments: [Empty text area]

Check In Reset

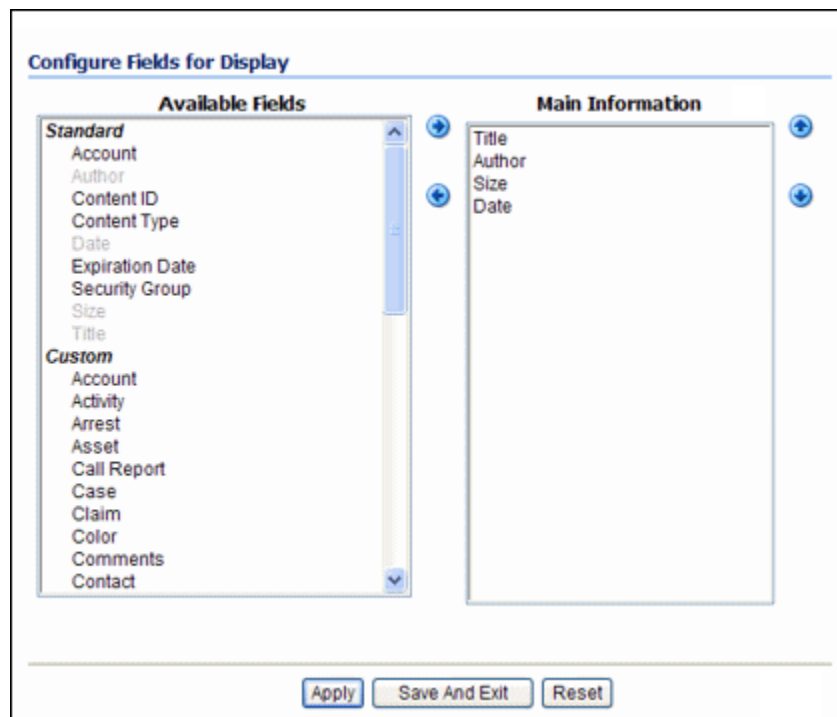
To display this form, click **New** in the Managed Attachments IFrame.

Elements	Description
Type	Select the option that best describes the file. The default document type for managed attachments is SiebelAttachment. 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. This field is required.
Security Group	Select a security group for the file. Files are available to users who have permission to a specified security group. This field is required.

Elements	Description
Primary File	<p>Specify a primary file using one of these methods:</p> <ul style="list-style-type: none"> Click Browse next to the Primary File field. Navigate to and select the native file, and then click Open. Enter the complete path name and file name of the native file in the Primary File field (for example, c:\My Documents\ABC Project\MyFile.doc). <p>This field is required.</p>
Comments	Enter any notes about the file.
Check In	Click this button to check in the specified document using the settings selected on this screen.
Reset	Click this button to cancel any entries and restore the default settings in this screen.

What is Configure Fields for Display screen?

The Configure Fields for Display screen enables you to specify the attachment information to display in the IFrame.



To display this screen, click **Configure** in the Managed Attachments IFrame.

Elements	Description
Available Fields	Lists fields available for display in the IFrame. 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 IFrame. 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 this button to preview your changes in the Managed Attachments IFrame screen. (If needed, temporarily reposition the Configure Fields for Display screen to view IFrame changes.)
Save And Exit	Click this button to save changes to the display configuration and return to the Managed Attachments IFrame.
Reset	Click this button to cancel any changes and restore the default system field display.

What is Content Information screen?

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

Content Information

Default Information Content Actions E-mail

Content ID: WLSCS_000047
Revision: 1
Type: Documents attached to Siebel Entities
Title: Application Photo 47851
Filer: weblogic
Comments:
Profile: SiebelDocProfile
Contact: 1LS-AF98
Template Type:
Order:
Account:
Service Request:
Call Report:
Opportunity:
Asset:
Quote:
Claim:
Case:
Evidence:
Arrest:
Incident:
Offense:
Group:
Suspect:
Lead:
Activity:
NTKDocDisclosureQuery:
Color:
Project:
Web Site Object Type:
Web Sites:
Exclude From Lists:
Web Site Section:
Region Definition:
Image Rendition Set:
Video Rendition Set:
Watermark Template ID:
Watermark Template Type:
wwWcTags:
Folder: 0
Hidden: FALSE
Read Only: FALSE
Inhibit Propagation: FALSE
Force Folder Security: FALSE
Security Group: Public
Account:
Checked Out By:
Status: Released
Formats: image/gif

Links

Web Location: https://hostname:port/cs/groups/public/documents/siebelattachmen/wlscs_000047.gif
Native File: [expanded_search.gif](#)
Discussion: [Create Discussion](#)

Revision	Date	Expiration Date	Status	Actions
[1]	3/8/10 1:03 PM	None	Released	Delete

To display this screen, click **Info** for a selected document in the Managed Attachments IFrame.

Elements	Description
Type	Displays the type that best describes the file. The default document type for managed attachments is SiebelAttachment.
Title	Displays the title of the attached Content Server file, assigned at checkin.
Author	Identifies the person who checked in the file.
Security Group	An identifier that specifies access permission to the file.
Comments	Displays additional notes about the file.
Siebel Entity Fields (Contact, Order, Account, Service Request, Call Report, Opportunity, Asset, Quote, Claim, Case, Evidence, Arrest, Incident, Offense, Group, Suspect, Lead, Activity, Project)	Displays fields for each Siebel record type. A Siebel record key is displayed in the field that corresponds to the Siebel record's type.
Checked Out By	Identifies the user who has the file checked out.
Status	Identifies the file's current status. A status of Released indicates that the revision is available in the Content Server.
Formats	Identifies formats for the file.
Web Location	Click this link to view a web-viewable rendition of the attached file.
Native File	Click this link to either save a copy of the file or open it in its native application.
Table	Lists revisions of the file, 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 file, updating it, checking in a similar file, subscribing to the file, or checking out and opening the file.
E-mail	The Send Link by E-mail link opens a new e-mail message that contains a URL to the selected file.

What is Info Update Form?

Use the Update Info Form to make changes to a selected document's metadata values. You can search for documents on the Content Server by their metadata values, as described in [How do I search for documents from the Content Server repository?](#).

Info Update Form for 'Misc Doc'

* Type: Documents attached to Siebel Entities

* Title: Misc Doc

* Filer: weblogic

* Security Group: Public

Account: _____

Metadata [Hide]

Comments: _____

Attach to Siebel Entities: [Hide]

Account: _____ +

Contact: _____ + ILS-AF98 ✖

Order: _____ +

Asset: _____ +

Activity: _____ +

Arrest: _____ +

Claim: _____ +

Call Report: _____ +

Case: _____ +

Group: _____ +

Lead: _____ +

Incident: _____ +

Offense: _____ +

Opportunity: _____ +

Project: _____ +

Quote: _____ +

Service Request: _____ +

Suspect: _____ +

Submit Update Reset

To display this form, click the **Properties** icon for a selected attachment in the Managed Attachments IFrame.

Elements	Description
Content ID	Displays the unique identifier assigned to the file.
Type	Select the option that best describes the file. The default document type for managed attachments is SiebelAttachment.

Elements	Description
Title	Enter a descriptive title for the document. By default, Content Server provides a prefix that identifies the Siebel entity attachment type, such as ContactAtt: for a document attached to a Contact entity. (This prefix is optional.)
Author	Identifies the user who checked in the current file revision.
Security Group	Specifies access permission to the file. You can enter text or select from the list of predefined values.
Revision	Identifies the revision number of the file. (You should change the revision only if there is a specific reason to do so.)
Comments	Enter any notes about the file.
Siebel Entity fields (Contact, Order, Account, Service Request, Call Report, Opportunity, Asset, Quote, Claim, Case, Evidence, Arrest, Incident, Offense, Group, Suspect, Lead, Activity, Project)	These fields identify the selected Siebel record, and link the attached file to the record. A record key is displayed in the field corresponding to the selected Siebel record's type. The plus sign icons allow you to link multiple Siebel records to an Content Server file. See How do I attach a Content Server document to multiple Siebel records?
Submit Update	Click this button to save the metadata changes to the attached file.
Reset	Click this button to cancel metadata changes and restore them to their values upon entering this form.

What is Scan Document screen?

Use the Scan Document screen to specify the type of document to scan or import, and then attach to the Siebel record.

To display this screen, click **Scan** in the Managed Attachments IFrame.

What is Expanded Search Form?

This search screen enables you to search the Content Server for content. After specifying search criteria and clicking **Search**, the results are listed.

Notice that the field corresponding to the Siebel entity type you are viewing displays an ID value. For example, if viewing a Contact record, an ID value is displayed in the Contacts adjacent field. To widen the search beyond documents attached to the selected Siebel record, remove this entity value.

Depending on settings, this screen may provide full or limited access to Content Server functions. For example, you may or may not be able to save queries for later use.

Search: Expanded Form
quick help

▼ Search Forms

Search Reset Save

Metadata Search

Content ID
Matches
▼

Title
Matches
▼

Type
Matches
▼

▼

Security Group
Matches
▼

▼

Account
Matches
▼

▼

Author
Matches
▼

Date
From

▼
To

▼

Expiration Date
From

▼
To

▼

Comments
Matches
▼

Contact
Matches
▼

Order
Matches
▼

Account
Matches
▼

Service Request
Matches
▼

Call Report
Matches
▼

Opportunity
Matches
▼

Asset
Matches
▼

Quote
Matches
▼

Claim
Matches
▼

Case
Matches
▼

Evidence
Matches
▼

Arrest
Matches
▼

Incident
Matches
▼

Offense
Matches
▼

Group
Matches
▼

Suspect
Matches
▼

Lead
Matches
▼

Activity
Matches
▼

Project
Matches
▼

Discussion Count
From

To

Discussion Type
Matches
▼

▼

Results Options

Results Per Page:
Sort By: Date ▼ Descending ▼

Search Reset Save

To display this form, click **Advanced Search** in the Managed Attachments IFrame.

Elements	Description
Content ID	Select an operator and search for the file's unique identifier.
Title	Select an operator and search for the file's title.
Type	Select an operator and search for the file's type.
Security Group	Select an operator and search for the file's security group.
Author	Select an operator and search for the person who checked in the file.
Date	Specify a date range and search for files released within the range.
Expiration Date	Specify a date range and search for files whose expiration date falls within the range.
Comments	Specify an operator and search for files by their comments.
Siebel Entity fields	Specify an operator and search for files by their Siebel record key.
Results Per Page	Determines the number of results that are displayed on the search results page.
Sort By	Determines which of the following options are used to sort the targeted search results, and whether those results are listed in ascending or descending (default) order: <ul style="list-style-type: none"> • Release Date (default) • Title
Search	Click this button to perform the search after specifying search criteria.
Reset	Resets the form.
Save	Click this button to save search criteria as a query for later use. (This field may not be available.)

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