Oracle® Fusion Middleware

User's Guide for Oracle Enterprise Content Management Solutions for Oracle Siebel

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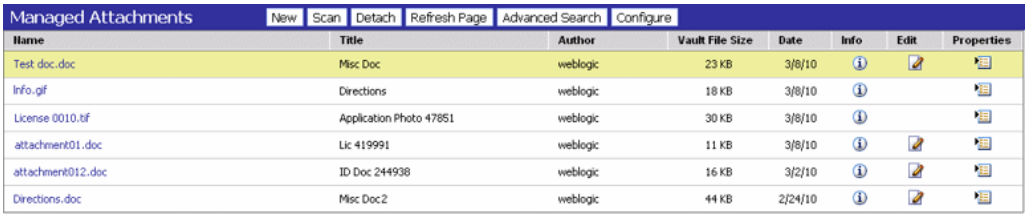
This document provides information on options available to Siebel users in the Managed Attachments iFrame configured through the Oracle Siebel adapter. It includes the following sections:

- "Siebel Attachments Solution Overview" on page 1
- "Using the Attachments Solution" on page 2
- "Attachments Solution User Interface" on page 8

1 Siebel Attachments Solution Overview

The Oracle Siebel Adapter for ECM allows Siebel CRM users to work with document attachments stored in an Oracle Universal Content Management (Oracle UCM) Content Server repository. Oracle UCM 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, and edit Oracle UCM documents attached to the selected Siebel record, as shown below. You can also launch the Oracle UCM application, and activate its search options to locate Oracle UCM documents to which you have access.



Name	Title	Author	Vault File Size	Date	Info	Edit	Properties
Test doc.doc	Misc Doc	weblogic	23 KB	3/8/10			
Info.gif	Directions	weblogic	18 KB	3/8/10			
License 0010.tif	Application Photo 47851	weblogic	30 KB	3/8/10			
attachment01.doc	Lic 419991	weblogic	11 KB	3/8/10			
attachment012.doc	ID Doc 244938	weblogic	16 KB	3/2/10			
Directions.doc	Misc Doc2	weblogic	44 KB	2/24/10			

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

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

2 Using the Attachments Solution

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

- "Starting the Attachments Solution" on page -2
- "Checking In and Attaching a Document" on page 2
- "Detaching a Document" on page 3
- "Configuring Fields for Display" on page 3
- "Viewing a Document's Information" on page 4
- "Editing a Document in its Native Application" on page 4
- "Opening or Saving a Document" on page 4
- "Updating a Document's Metadata" on page 4
- "Attaching an Oracle UCM Document to Multiple Siebel Records" on page 4
- "Deleting a Document on Content Server" on page 5
- "Searching for Documents on Content Server" on page 5
- "Scanning Via Oracle Distributed Document Capture" on page 6

For more information about Content Server procedures, see the *Oracle Fusion Middleware User's Guide for Content Server*.

2.1 Starting the Attachments Solution

Follow these steps to display the 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 "Checking In and Attaching a Document" on page 2) or scanning (see "Scanning Via Oracle Distributed Document Capture" on page 6).

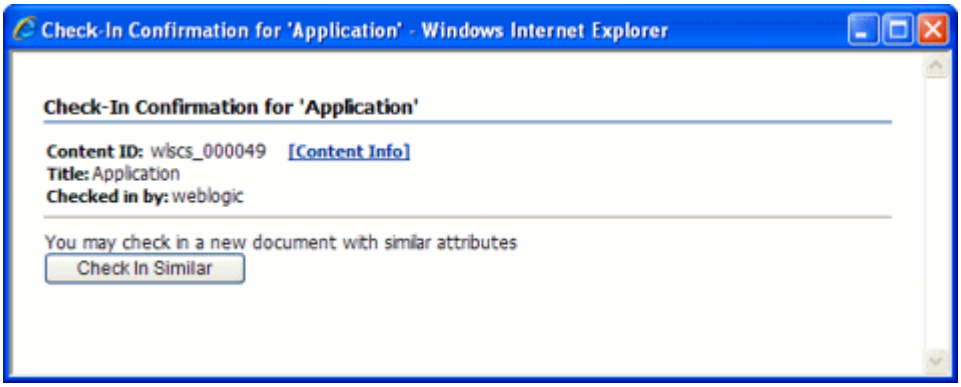
2.2 Checking In and Attaching a Document

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 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. A button called **Check In Similar** 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.

2.3 Detaching 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 "Deleting a Document on Content Server" on page 5.)

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.

2.4 Configuring Fields for Display

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 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.

2.5 Viewing a Document's Information

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

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

2.6 Editing a Document in its Native Application

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

1. In the Managed Attachments 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.

2.7 Opening or Saving a Document

Follow these steps to open a document in a Web-viewable format or save the document in its native format to a selected location such as a local computer. Note that changes you make to a document in this way are not saved on the Content Server; instead, see "Editing a Document in its Native Application" on page 4.

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**.

2.8 Updating a Document's Metadata

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

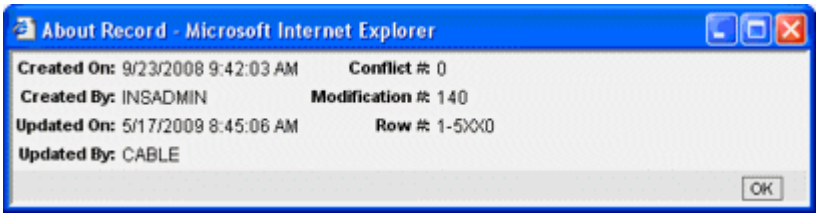
1. In the Managed Attachments iFrame, click the **Properties** icon for a selected attachment.
2. Make changes to the document's metadata values on the Info Update Form.
3. Click **Submit Update**.

2.9 Attaching an Oracle UCM Document to Multiple Siebel Records

You can attach a single Oracle UCM 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 Oracle UCM document to a Siebel record and then manually add the record keys of additional Siebel records to link them with the Oracle UCM attachment.

1. Note the key for each Siebel record you want to link to the Oracle UCM 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 Oracle UCM 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.

2.10 Deleting a Document on Content Server

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 "Detaching a Document" on page 3.

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.

2.11 Searching for Documents on Content Server

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 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.

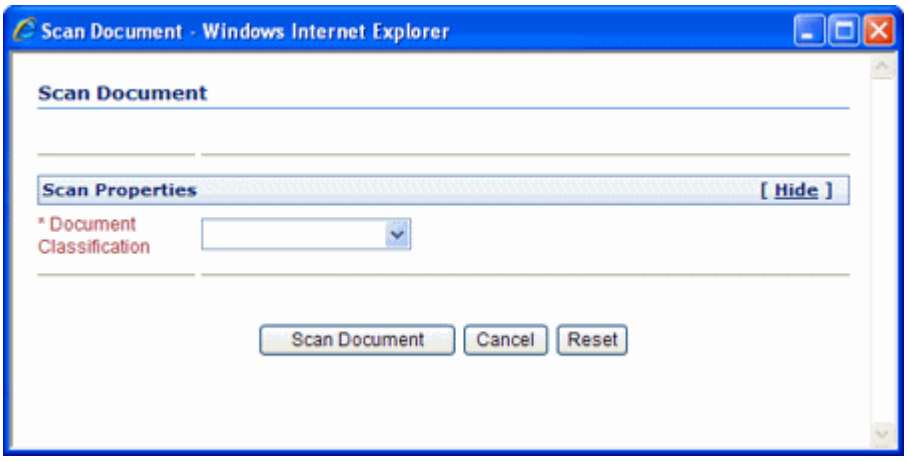
Note: Depending on the iFrame configuration, you may have full or limited access to Content Server and its features. For more information about its features, click the **quick help** link or see the Content Server documentation.

2.12 Scanning Via 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 the **Send** button, which transfers it from Oracle Distributed Document Capture to Oracle UCM 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.



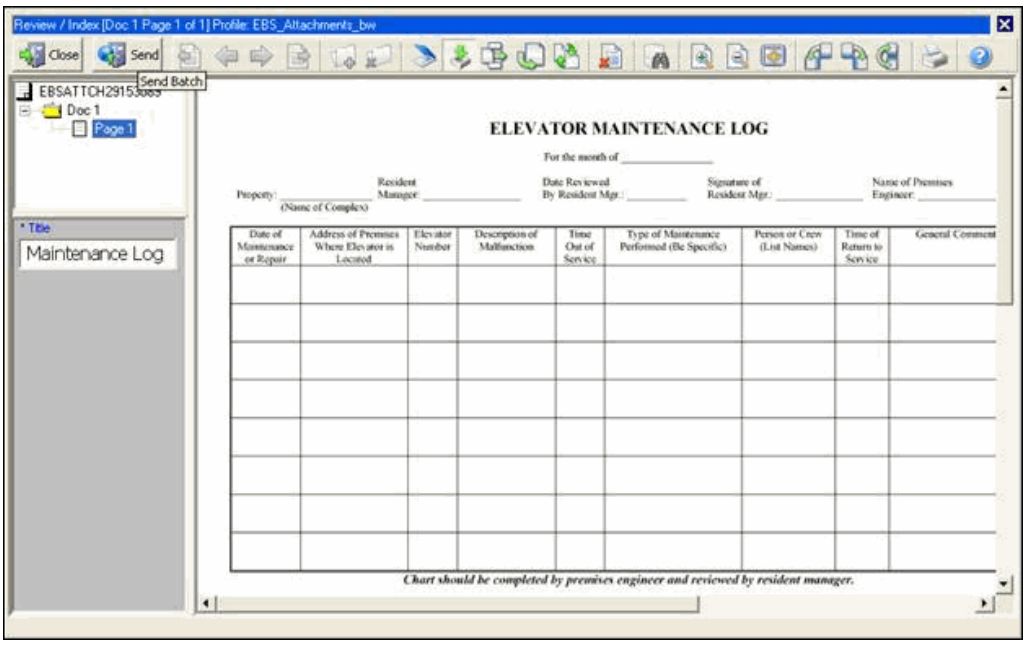
3. Select a classification in the **Document Classification** field.

   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. 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 shown in Figure 1, ready for you to review and index them. (All pages are scanned and stored in one document in the batch.)
   - If set for *importing*, a File Import screen is displayed, prompting you to select one or more scanned image files to import. After you select files, their pages are displayed in the Review/Index screen shown in Figure 1, ready for you to review and index. (All files are imported into a single document in a single batch.)

Figure 1 Review/Index screen in Oracle Distributed Document Capture



5. In the Review/Index screen, review, edit, and index the document. For information, see the *User's Guide for Oracle Distributed Document Capture.* Follow these guidelines:
   - You can add pages to documents, but should not add documents to the batch.
   - Index fields are displayed in the lower side pane. Index fields provide values that are stored as metadata with the Oracle UCM 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 Oracle UCM 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.

3 Attachments Solution User Interface

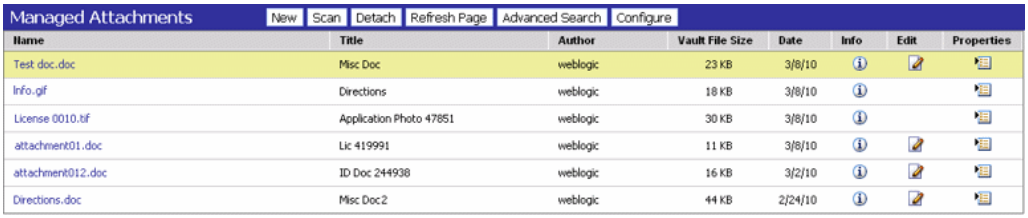
The Adapter screens include:

- "Managed Attachments iFrame" on page 8
- "Content Check In Form" on page 9
- "Configure Fields for Display Screen" on page 11
- "Content Information Screen" on page 12
- "Info Update Form" on page 14
- "Scan Document Screen" on page 15
- "Expanded Search Form" on page 16

3.1 Managed Attachments iFrame

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

The Managed Attachments iFrame is displayed within the Siebel record. It lists all Oracle UCM documents attached to the selected Siebel record, and provides the options listed in Table 1.



About the iFrame

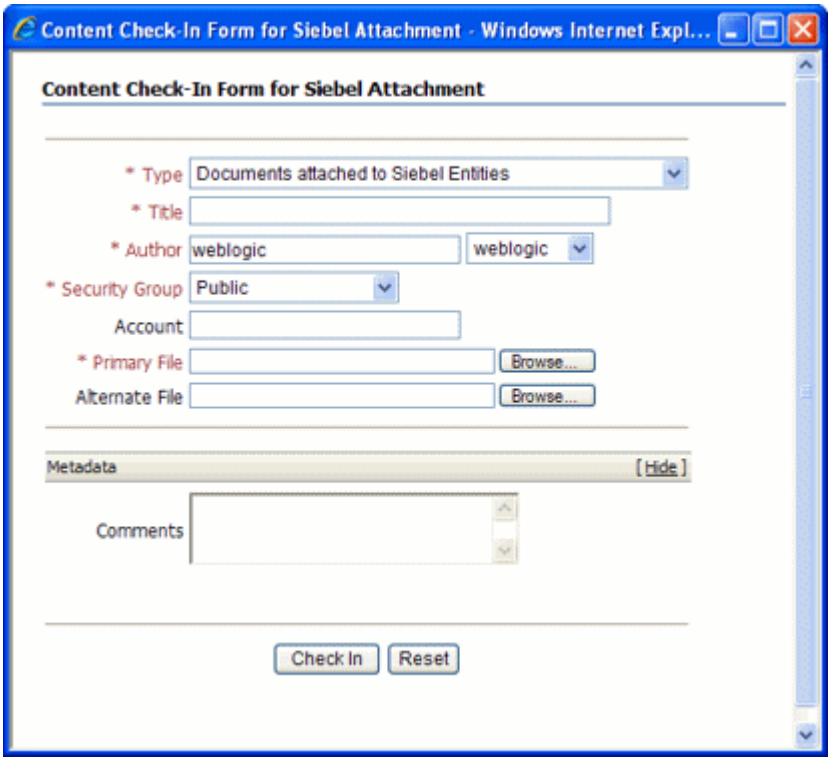
- The default columns are described in Table 1, although you can customize the columns displayed by clicking **Configure**, as described in "Configuring Fields for Display" on page 3.
- If the list of attachments is long, arrows for displaying previous and next pages are displayed at the bottom.
- You 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).

Table 1 Managed Attachments iFrame Options

Elements	Description
Name	Lists the native name (including extension) of each Oracle UCM 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 Oracle UCM document, assigned at checkin.
Author	Identifies the person who checked in the file.
Size	Displays the size (KB/MB) of the attached Oracle UCM document.
Date	Displays the date on which the Oracle UCM document was last submitted to Oracle UCM.
Info	Click this icon to display detailed information and content actions for the selected document on the Content Information Screen.
Edit	Click this icon to check out, open, and edit the attached Oracle UCM document in its native application.
Properties	Click this icon to update metadata values for the attached Oracle UCM document on the Info Update Form.
New	Click this button to attach an Oracle UCM document to the selected Siebel record, by completing fields on the Content Check In Form.
Scan	Click this button to scan or import a document and attach it to the Siebel record, as described in "Scanning Via Oracle Distributed Document Capture" on page 6.
Detach	Click this button to detach the selected Oracle UCM document. Detaching removes the Oracle UCM document from the Siebel entity, but not from Oracle UCM.
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 Configure Fields for Display Screen.

3.2 Content Check In Form

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

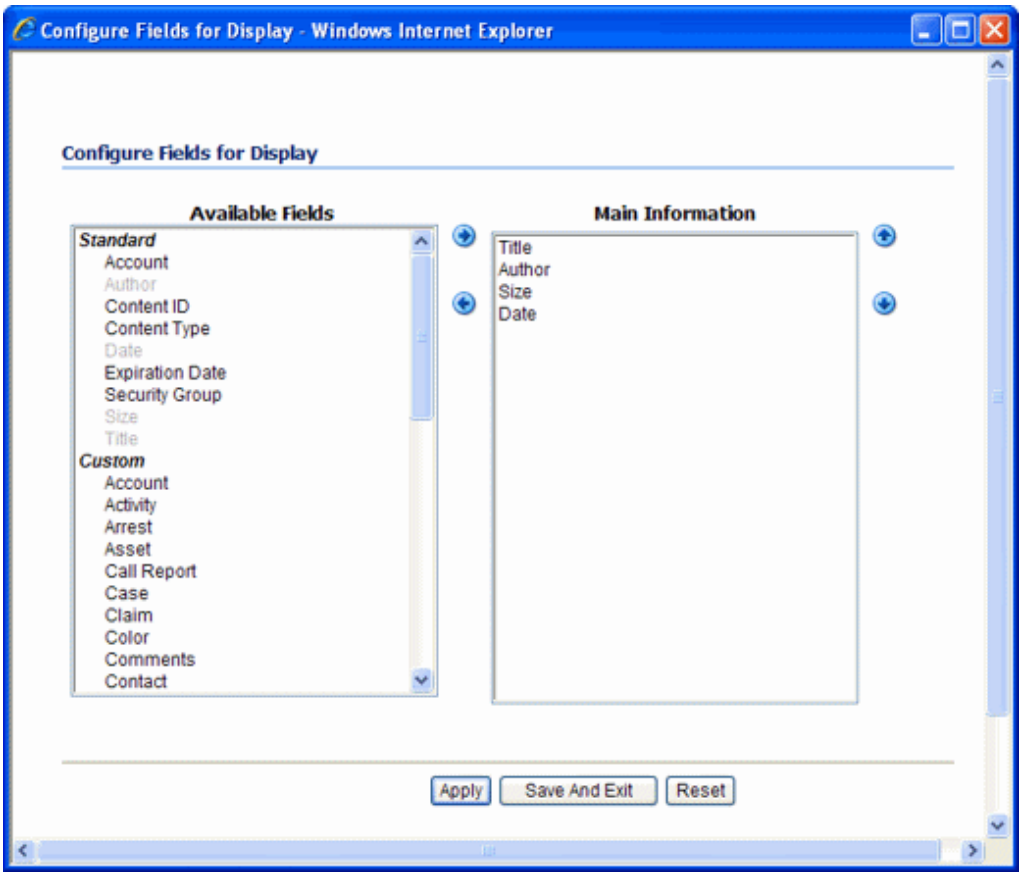


To display this form, click **New** in the Managed Attachments iFrame.

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.
Primary File	Specify a primary file using one of these methods: ■ 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). This field is required.
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.

3.3 Configure Fields for Display Screen

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

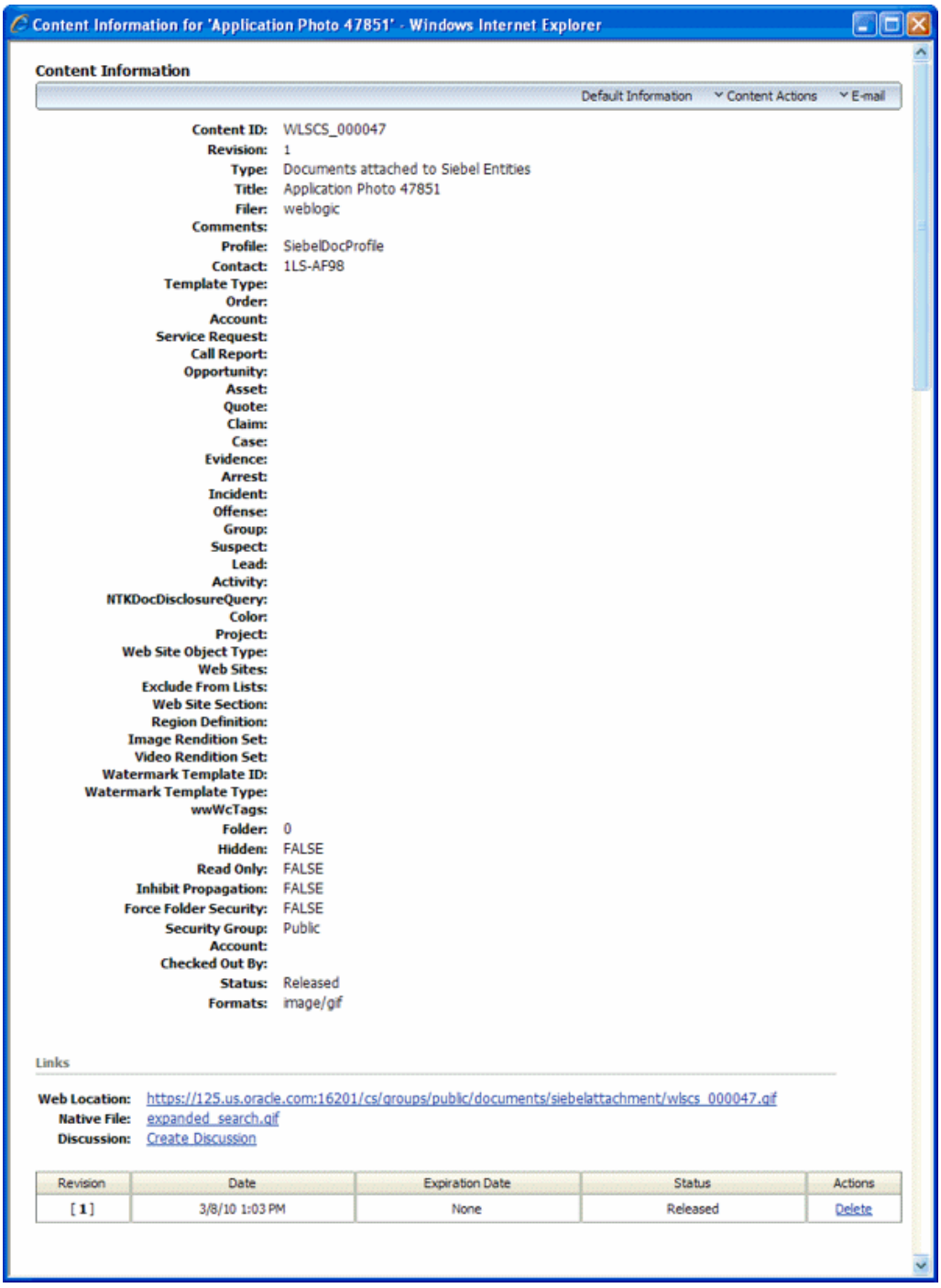


To display this screen, click **Configure** in the Managed Attachments iFrame.

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.

3.4 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.

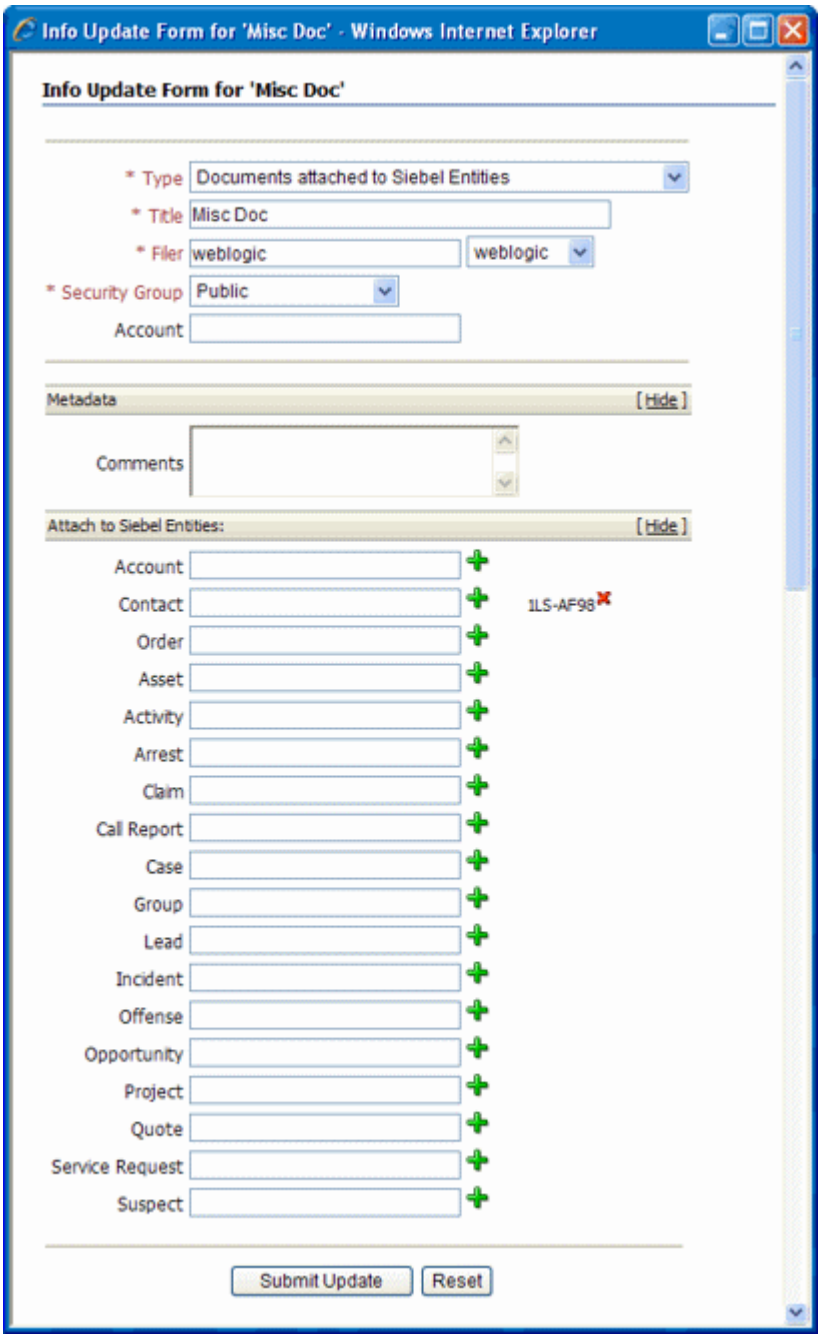


To display this screen, click **Info** for a selected document in the Managed Attachments iFrame.

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 Oracle UCM 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.

3.5 Info Update Form

Use the Update Info Form to make changes to a selected document's metadata values. You search for documents on the Content Server by their metadata values, as described in "Searching for Documents on Content Server" on page 5.



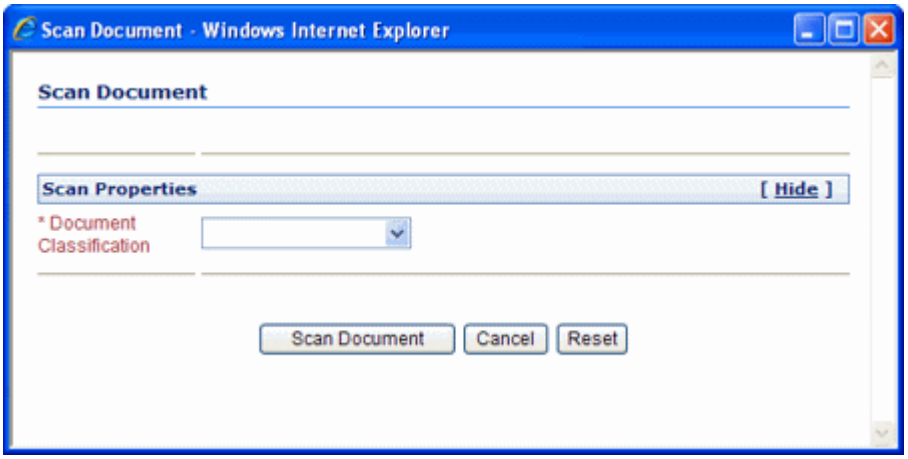
To display this form, click the **Properties** icon for a selected attachment in the Managed Attachments iFrame.

Elements	Description
Content ID	Displays the unique identifier assigned to the file.

Elements	Description
Type	Select the option that best describes the file. The default document type for managed attachments is SiebelAttachment.
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 Oracle UCM file. See "Attaching an Oracle UCM Document to Multiple Siebel Records" on page 4.
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.

3.6 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.



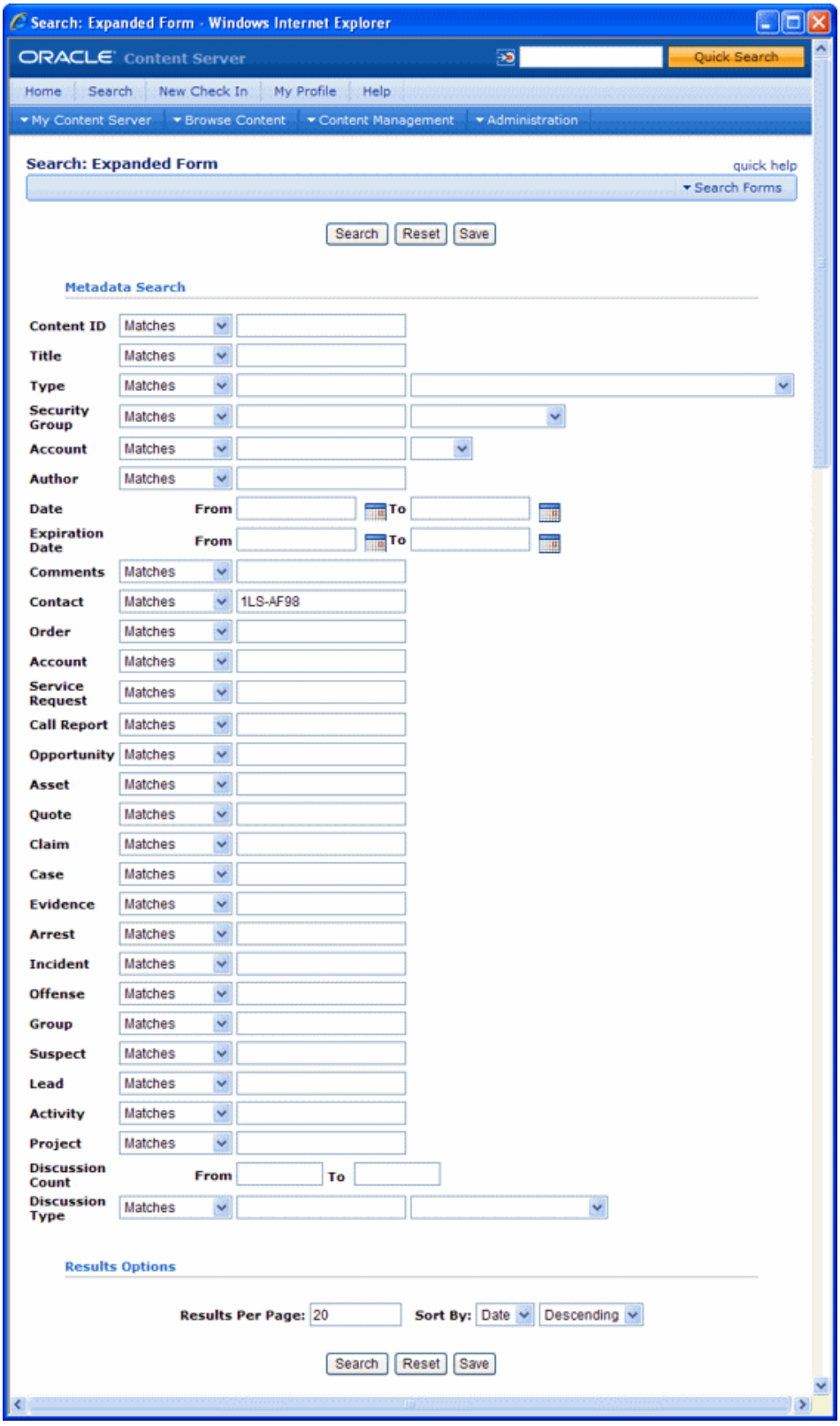
To display this screen, click **Scan** in the Managed Attachments iFrame.

3.7 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.



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: ■ 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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Oracle Fusion Middleware User's Guide for Oracle Enterprise Content Management Solutions for Oracle Siebel, 11*g* Release 1 (11.1.1)
E17067-01

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