Oracle® Fusion Middleware

User's Guide for Enterprise Content Management Solutions for E-Business Suite

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This document describes how to use the Enterprise Content Management Solutions for E-Business Suite. It is intended for E-Business Suite users using Enterprise Content Management solutions.

This document contains the following main topics:

1 Imaging Solution Overview

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

- Launch I/PM from E-Business Suite, and select and perform workflow tasks. When you select a task, you acquire it for your use and it is no longer available to other users.
- View attached images and metadata values. Use I/PM's tools for viewing, annotating, and redacting images, as your permissions allow.
- Key entries in E-Business Suite while viewing images and related values in the I/PM viewer. See "Keying Entries From Images" on page 2.
- Perform actions related to the workflow task, such as routing, canceling, updating, and completing tasks.
- Scan or upload supporting documents for a selected E-Business Suite record.
- View supporting images for an E-Business Suite record without leaving the E-Business Suite application.

1.1 Sample Scenario 1: Processing Invoices

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

- 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.

- From E-Business Suite, you launch the invoices imaging solution, by selecting a command called *Process Invoices* from the Zoom menu (or other special menu or key).
- 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.
- In the Task Viewer, you view the task's invoice image, key entries in E-Business Suite 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.
- You complete the task and begin another, if desired.

  Most often, changes you make in E-Business Suite are synchronized with I/PM, and vice versa.

1.1.1 Keying Entries From Images

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

1. From E-Business Suite's invoice entry screen, start the invoice imaging solution.
2. Select a task. In the Task Viewer screen, view the invoice image and its associated metadata values.
3. In the invoice entry screen, key in entries such as invoice amount and date.
4. Save the invoice entry in E-Business Suite.
5. Complete the task.
   - Values are synchronized between I/PM and E-Business Suite. For example, suppose the amount was incorrectly listed in the I/PM summary values. If you entered a different amount in the invoice entry screen (based on the invoice image), the I/PM metadata value is updated.
   - If configured, the invoice image is stored as an attachment to the corresponding E-Business Suite record.
6. You repeat steps 2 through 5 to create additional invoice records, keying from their displayed images.

1.2 Sample Scenario 2: Capturing Supporting Employee Documents

An Imaging Solution configured for capturing supporting documents might work as follows:

- From E-Business Suite, you retrieve a record such as an employee record.
- You launch the document imaging solution, by selecting a command called **Scan Employee Document** from the Zoom menu (or other special menu or key).
- 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.
- You enter index values (metadata) in Oracle Distributed Document Capture to store with the images.

- You click Send, which transmits the captured document images and their metadata from Oracle Distributed Document Capture to Oracle I/PM.

1.3 Sample Scenario 3: Viewing Supporting Employee Documents

An Imaging Solution configured for viewing supporting documents might work as follows:

- From E-Business Suite, you retrieve a record such as an employee record.
- You launch the document imaging solution, by selecting a command called **View Employee Documents** from the Zoom menu (or other special menu or key).
- From the list of documents associated with the employee record and their metadata values, you select a document.
- The document is displayed in the Oracle I/PM viewer, where you can view its images, and with appropriate permissions, apply annotations or redactions.

2 Using the Imaging Solution

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

Starting the Solution

Working with the Task List

Performing Tasks

2.1 Starting the Imaging Solution

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

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

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

Note: Depending on configuration, you may be prompted to enter a username 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 Screen is displayed. If needed, select a profile in the Profile field. Tasks are associated with a *profile*, and users assigned a profile can access any of its tasks not currently selected by other users. After you select a profile, a list of tasks is displayed. See "Viewing and Selecting Tasks" on page 4.
- 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 E-Business Suite 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 Viewing and Selecting Tasks

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

When you select a task, it is acquired for your use and no longer available to other users also assigned the selected profile. It remains selected until you complete or release the task, even if you close the browser and the session times out. The next time you view the task list, it remains listed as one of your tasks. To release (unacquire) a task, see "Releasing Tasks" on page 5.

1. Start the Imaging Solution as described in "Starting the Imaging Solution" on page 3.
2. In the Profile field, select a profile, if needed.

   Tasks are associated with a *profile*, where users assigned the profile can access its tasks. After you refresh the display, a list of the profile's tasks is displayed.
3. From the Task List Screen, select a task.
   - To perform tasks without selecting them manually, click the **Auto Task** button. In this mode, tasks are automatically assigned and displayed in the Task Viewer Screen.
   - To manually select a task, click its **View Task** link in the Action column. The task is displayed in the Task Viewer Screen.
   - A side panel may list additional task list actions you can perform.

2.3 Automatically Selecting Tasks

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

1. Display the Task List Screen.
2. Click the **Auto Task** button.

   The Task Viewer Screen is displayed with your first task. After you complete a task, the next task is automatically displayed in the viewer.
3. To exit auto task mode, click the link for returning to the task list from the side panel.

2.4 Releasing Tasks

When you select a task, it becomes acquired by you, until you either complete or release it. (If you close your browser without completing a task, the task remains listed in your task list when you next view the list.)

Releasing a task makes it available to all users assigned its associated profile. Follow these steps.

1. Display the Task List Screen.
2. Select a task to release.
3. Click the Release button.

2.5 Customizing the Task List Display

You can adjust the task list in the following ways:

- "Hiding or Displaying Columns" on page 5
- "Reordering and Resizing Columns" on page 5
- "Detaching the Display" on page 6

2.5.1 Hiding or Displaying Columns

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

1. Display the Task List Screen. (If needed, choose a profile in the Profile field.)
2. Click the View menu, select Columns, and select a column to hide or display it.

   Selecting a column hides it if displayed, and displays it if hidden. A checkmark is displayed next to columns selected for display.

   Select **Show All** to display all columns.
3. Click the Refresh button shown below.

2.5.2 Reordering and Resizing Columns

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

1. Display the Task List Screen. (If needed, choose a profile in the Profile field.)
2. To resize a column, hover the cursor over its heading until a double arrow is displayed, then click and drag to increase or decrease its width.
3. Reorder columns using either of these methods:
   - Click a column's heading row, and drag and drop it to a new location. Columns are reordered.
   - Click View, then Reorder Columns. In the Reorder Columns popup displayed, select columns to display and click the up and down buttons to reorder them. The column you position topmost in this popup is displayed leftmost in the task list table. Click **OK**.

2.5.3 Detaching the Display

Follow these steps to display an expanded view of the task list in a detached, movable screen.

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

2.6 Viewing Document Images

Follow these steps to view a document associated with a selected task in the I/PM viewer.

1. Display the Task Viewer Screen, either by selecting a task or choosing **Auto Task** in the Task List Screen.

   The task's document is displayed in the I/PM viewer in the large panel of the Task Viewer Screen. The document title is listed in the top tab.

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

2. Use the I/PM viewer toolbar buttons to perform tasks such as rotating images, zooming in or out, or moving between pages of the document.

   For more information, see the *Oracle Fusion Middleware User's Guide for Oracle Imaging and Process Management*.

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

2.7 Customizing the Task Viewer Display

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

- The **I/PM Viewer** panel shows the document's image, along with related options. See "Viewing Document Images" on page 6.

- The **Task Actions** panel lists action commands related to the task, such as routing, updating, or completing actions.
- The **Summary** panel lists key metadata values assigned to the document in I/PM for quick reference. For example, in an Invoice Processing scenario, invoice number and supplier name might be listed.
- The **Comments** panel lists comments entered for the task by users. See "Viewing and Entering Comments" on page 8.

You can customize the task viewer as follows:

- To hide a panel, click its minus (-) sign box. The panel collapses and the sign changes to a plus (+). To show a panel, click its plus (+) sign.
- To resize a panel, hover the cursor at the top of its title bar. When it becomes a two-headed arrow, click and drag it up or down to change its size.
- You can use the basic or advanced viewer. You must use the advanced viewer to add annotations, as your permissions allow.

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

2.8 Skipping Tasks

After selecting a task and viewing it in the Task Viewer Screen, you may decide to skip a task, which makes it available to other users with the same profile.

1. In the Task Viewer Screen, click the link for skipping or releasing the task.

   You return to the task list. (If using auto task mode, the next available task is automatically displayed, if tasks remain.) The skipped task is now available to other users assigned its profile.

2.9 Selecting Users or Groups

When performing tasks, you may need to identify a user or group of users. For example, in an invoice processing solution, you might search for users to request an invoice's approval. Follow these steps to search for a user or group of users and select them. (Depending on configuration, you search for either users or groups.)

1. Display the Select User/Group Screen.

   This screen is displayed whenever you choose an action command requiring a user or group selection.

2. In the Search field, specify the criteria by which you are searching, such as by user name or group name.

3. In the entry field, specify the value for which you are searching.

   For example, if searching by username, 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 the **Search** button 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**.

2.10 Selecting Items

When performing tasks, you may need to select an item from a list of choices. For example, in an invoice processing solution, you might select a processing group from several choices. Follow these steps to select an item.

1. Display the Select Item Screen.

   This screen is displayed whenever you select an action command requiring an item selection.

2. From the field listing choices, select an item and click **OK**. Click **Cancel** to exit the screen without a selection.

2.11 Viewing and Entering Comments

The Task Viewer Screen typically includes a Comments side panel that lists the first portion of comments entered by users about the selected task. Follow these steps to view complete comments or add them.

1. In the Comments panel in the Task Viewer Screen, click the glasses icon shown below to view all comments.

   A View Comments popup is displayed, listing comments in the order in which they were added, along with the date and user who entered the comment. Click **OK** to close the popup.

2. To add a comment, click the Add Comment icon shown below. Enter a comment in the Comment Text field of the popup and click **OK**. The new comment is displayed at the bottom of the comments list.

3 Imaging Solution User Interface

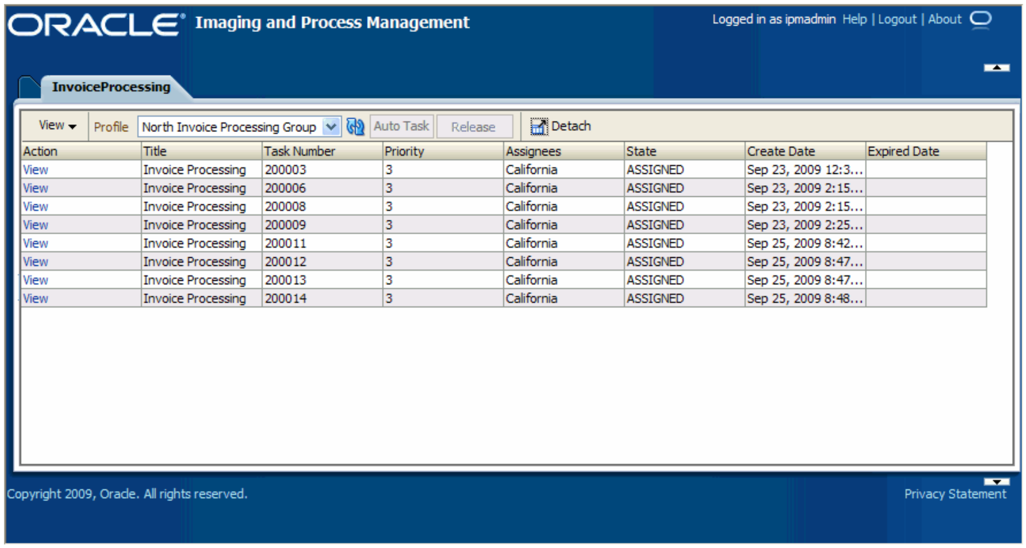
The Imaging Solution contains the following user interface screens:

- "Task List Screen" on page 8
- "Task Viewer Screen" on page 10
- "Select User/Group Screen" on page 11
- "Select Item Screen" on page 12

3.1 Task List Screen

Use this screen to view and select from a list of tasks available to you, based on a selected profile. You can also select related links (if present), and activate auto task mode for automatically selecting tasks.

To display this screen, start the Imaging Solution in E-Business Suite by clicking the Zoom menu icon in the toolbar (or other specified menu or key), choosing the solution command, and clicking **OK**. For example, if using an Invoice Processing solution, select the Process Invoices solution command.



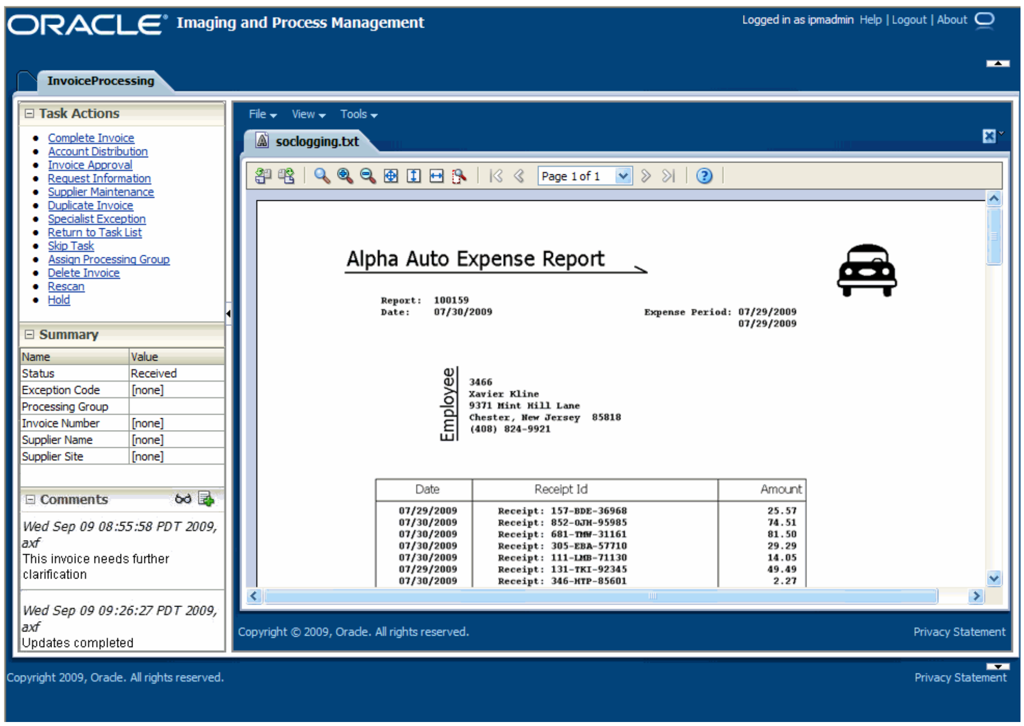
Element	Description
Task List Links	Depending on configuration, this side panel may list task list-related links. (This side panel may not be displayed.) For example, it might include links to external informational sites, shortcuts to commonly used instructions or internal organization links.
View	Use this menu to reorder columns, hide or display columns, and detach the task list to a floating screen.
Profile	If needed, select a profile (category to which tasks are assigned) to view its tasks. You may be assigned multiple profiles.
	Click to update the task list display.
Auto Task	Click to activate auto task mode, in which tasks are automatically selected and displayed in the Task Viewer Screen, instead of you selecting them manually from the Task List Screen.
Release	Click to make a previously selected task available to all users assigned its profile. **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.)
Detach	Click to expand the task list to a floating window you can reposition on the screen. To attach, click Detach again.

Element	Description
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 Screen.

3.2 Task Viewer Screen

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

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

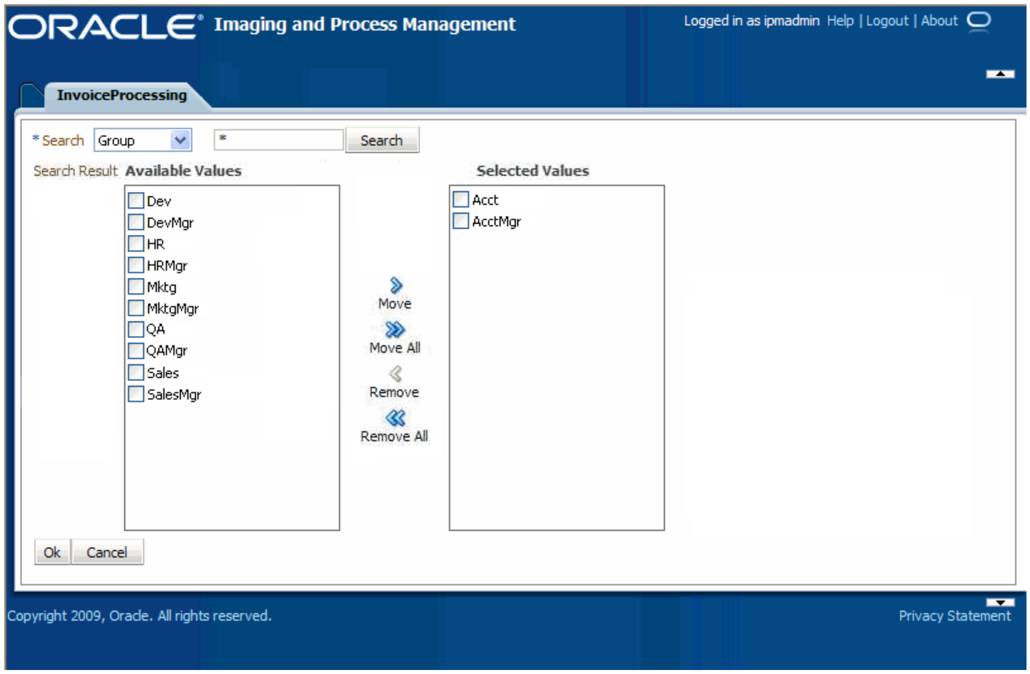


Element	Description
Action Commands	This side panel typically lists action commands for the selected task. Common tasks include: Complete Task, Skip Task, and Return to Task List, plus tasks specific to the business use.
Summary	Displays metadata values stored in I/PM for the document, for reference.
Comments	Displays the first line of comments users have entered for the selected task. Use this area to view or enter comments.
I/PM Image Viewer	Displays the task's associated images in the basic or advanced I/PM image viewer. For more information on I/PM viewer options, see the *Oracle Fusion Middleware User's Guide for Oracle Imaging and Process Management*.

3.3 Select User/Group Screen

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

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

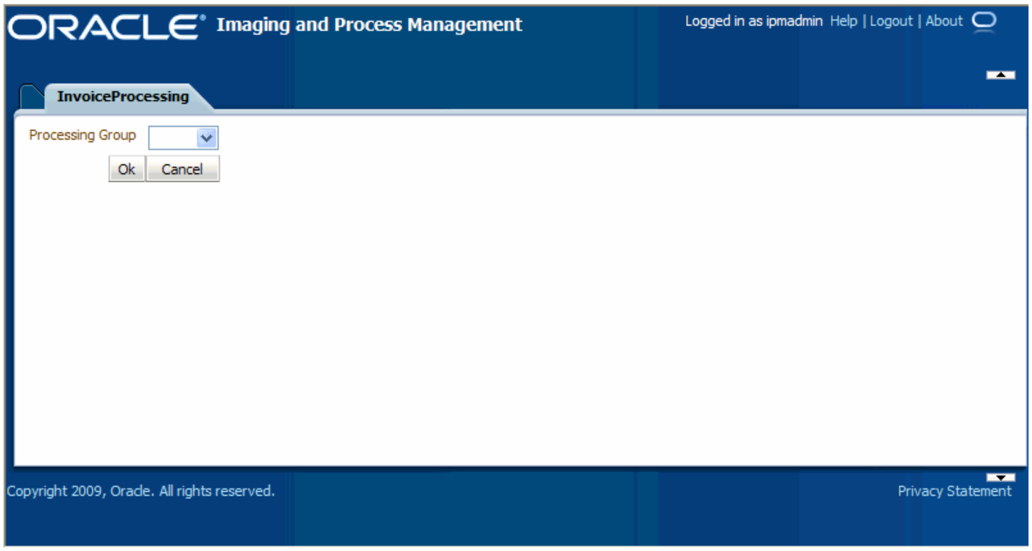


Element	Description
Search	Select the category by which to search for a user or users. This field includes choices such as Username, Last Name, First Name, or Group.
Search Entry	Enter the value to find, based on the selected search category. You can include an asterisk (*) as a wildcard to match one or more unknown characters. For example, enter *Ols** to search for users with a last name of Olson.
Search	Click this button 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 the Search button. 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.
Cancel	Exit this screen without selecting users or groups.

3.4 Select Item Screen

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

Display this screen by choosing a command requiring a selection. For example, clicking an action command called *Assign Processing Group* on the Task Viewer Screen might display the Select Item screen for assigning the task to a selected processing group.



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

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