

Introduction

Oracle Documents Cloud Service (also referred to as "Oracle Documents”) is a subscription-based file sync and share service available in the Oracle Cloud. It gives your employees a way to easily store and share files in the Oracle Cloud while meeting the security and governance needs of your IT department.

Julia Wilson is buying a used BMW privately, and would like AviFinancial to finance her car purchase. She speaks with Ann Wilson, her personal banking representative, who starts the loan process, and provides Julia with links to loan policy and FAQs, the loan application, and where Julia can upload the completed application and any other information. Julia reviews the policy documents, downloads the application form, and submits content relevant to the application. Ann then adds the loan re-payment and amortization schedule to the shared folder, for Julia’s reference.

This hands-on lab scenario is broken up into 3 distinct parts, showcasing different access points for Documents Cloud Service: desktop client, the web UI, and mobile.

**Before you begin...**

1. Your user names will be your oracle email for example: **richard.nessel@oracle.com**

Throughout this document, you will be instructed to log in as user Ann, or as user Julia. You will team up with another participant and one of you will be Ann, and the other will be Julia.

1. Install and configure Oracle Documents Cloud Service Desktop Client. The Oracle Documents Cloud Service desktop sync client keeps the files on your computer automatically up-to-date. When you install the client on a computer, it creates a new folder called My Oracle Documents. Any folders you add to My Oracle Documents are automatically synced in the cloud, and any folders added to the cloud are available for syncing in My Oracle Documents on your local computer. If a file changes in either place, the change is automatically updated in the other location, so they always match.

We have already downloaded the desktop client installer file for you. It is on your desktop and called **oracle\_documents\_setup.exe**. Double-click it to start the install.

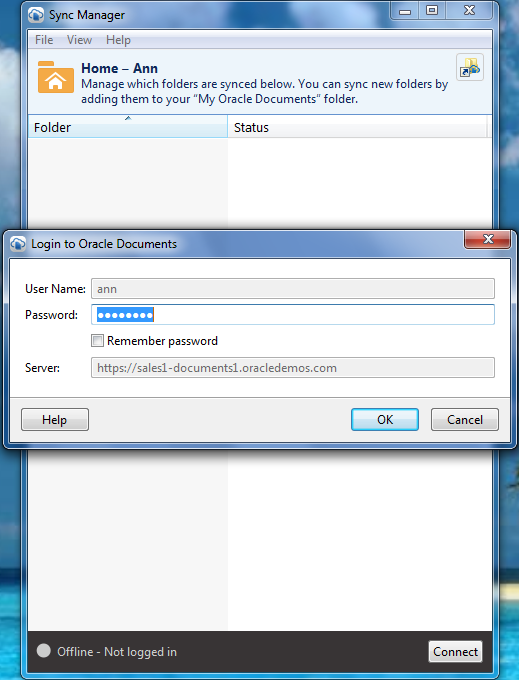
**In “real life” you would download the desktop client from** [here](http://www.oracle.com/technetwork/middleware/documentscloud/downloads/index.html)**.**

The first time you use the desktop client, a welcome screen displays, showing you what you can do with the client. Click the check box to stop the welcome screen from appearing again.

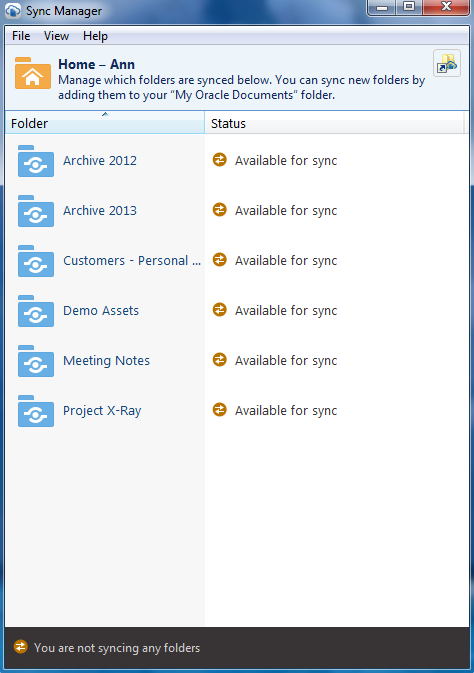
Next, you are prompted to enter your account information:

* Enter the user name for your Oracle Documents Cloud Service account.
* Enter your password. Check Remember Password to prevent the password prompt from appearing each time you start the client.
* Enter the address for the cloud server <https://scdemos-scuscdc.documents.us2.oraclecloud.com/documents> . This is the same URL you use when you access Oracle Documents Cloud Service using a web browser.

1. Log in as user Ann.



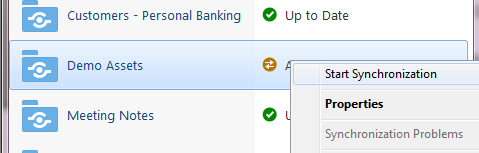
You should see the following in the Sync Manager:



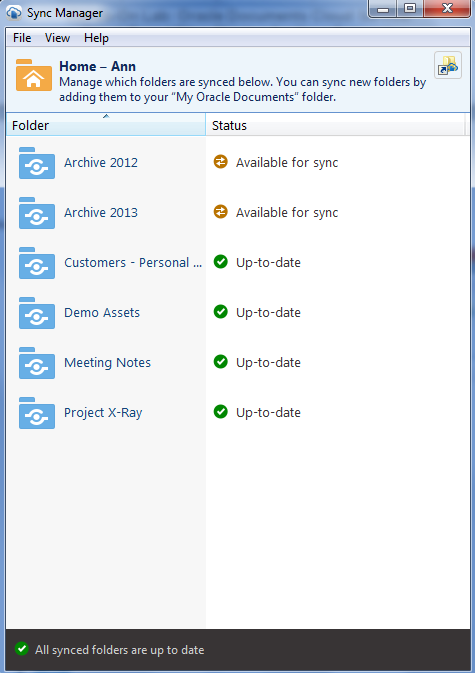
1. Synchronize the following folders:

* Customers – Personal Banking
* Demo Assets
* Meeting Notes
* Project X-Ray

To synchronize a folder, select the folder then choose Start Sync from the right-click menu.

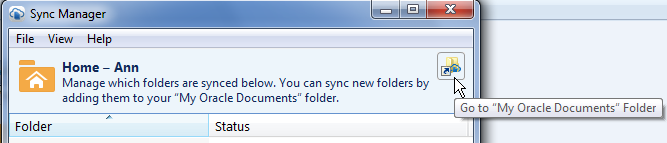


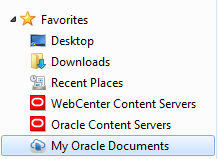
After you sync all four folders, your Sync Manager should look like this:



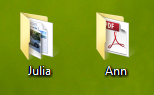
You can see that Ann has used the cloud as archive storage, and that content from 2012 and 2013 is stored in the cloud, but not sync’ed with the desktop. This content remains online, secure, and available in the cloud.

1. Navigate to the **My Oracle Documents** folder by clicking the icon in the Sync Manager header.





1. Open the **Demo Assets** folder and copy both the **Ann** and **Julia** folders to your desktop.



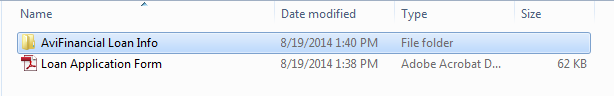
Working with the Desktop Client

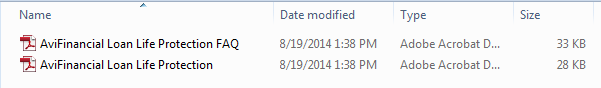
Ann has just spoken with Julia Wilson, her personal banking customer, and she would like to apply for a car loan. After speaking with Julia, Ann sets up a folder with some loan application documents for Julia.

Since Ann is at work on her desktop, she naturally starts working on these documents from her desktop.

In this first exercise, Ann creates a shared folder with content to which Julia can contribute.

1. Open the **Ann** folder on your desktop.
   1. Drill down into the folder **Loan Application – Automobile 2014**, and then the subfolder **AviFinancial Loan Info**. Note some of the some of the files that Ann has prepared.

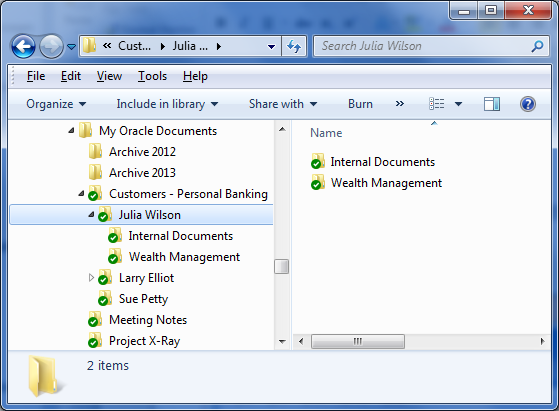




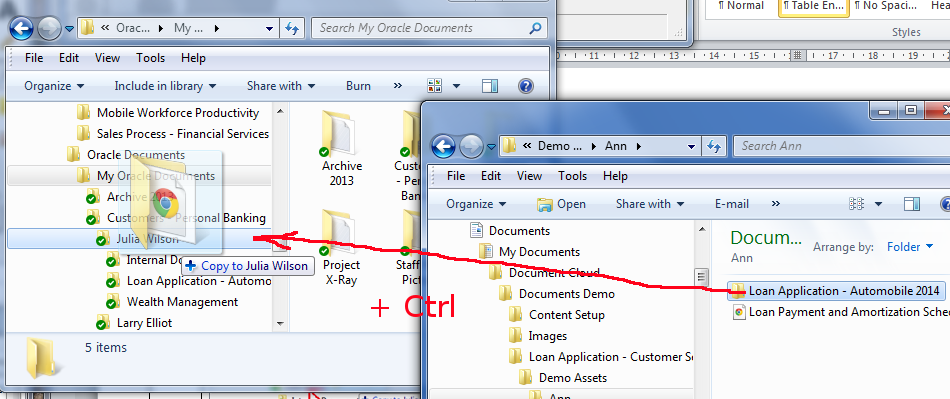
Ann has all the documents ready so she is ready to copy them over to Julia’s folder in her AviFinancial account.

* 1. Ann navigates to the Julia Wilson folder in her My Oracle Documents directory. My Oracle Documents contains all of Ann’s Documents Cloud documents that she’s chosen to keep in sync with her desktop.

Use Windows Explorer to navigate to the **My Oracle Documents** directory. Drill down to **Customers – Personal Banking** > **Julia Wilson**.

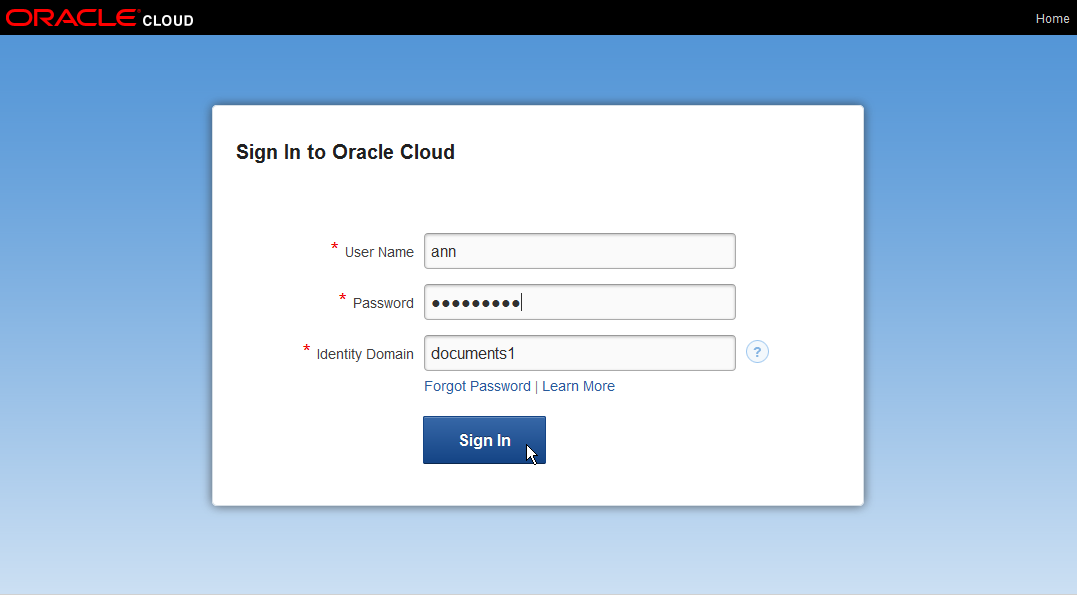


1. Ann is ready to share her loan application files with Julia.
   1. In a separate Windows Explorer window, navigate to the **Ann** folder on your desktop.
   2. Drag and drop the folder **Loan Application – Automobile 2014** to the Julia Wilson folder. **Hint:** Press the CTRL key during the drag and drop to ensure that all the files are copied to the destination folder.

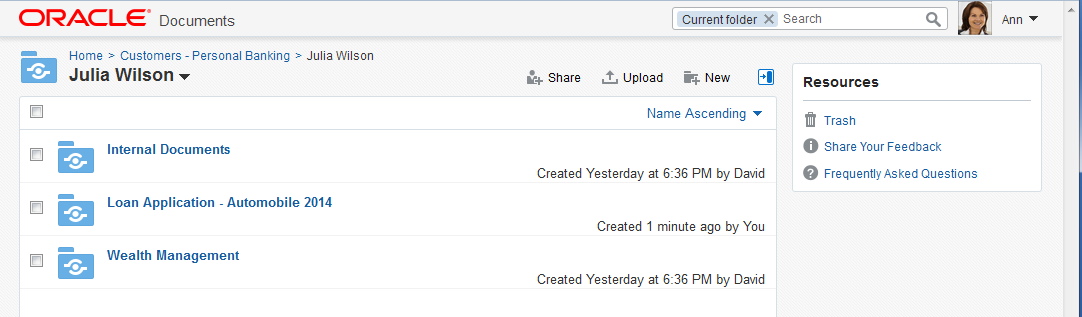


**Note:** If you open the Sync Manager quickly after completing the previous step, you will see the status on the folder **Customers – Personal Banking** change **to Syncing…** and then back **to Up-to-date**. Ann can verify that all the older changes on her desktop are migrated to the cloud.

1. Ann uses the Oracle Documents Cloud web interface and sees that the files have been sync’ed with the cloud.
   1. Open your web browser and log in as user Ann.

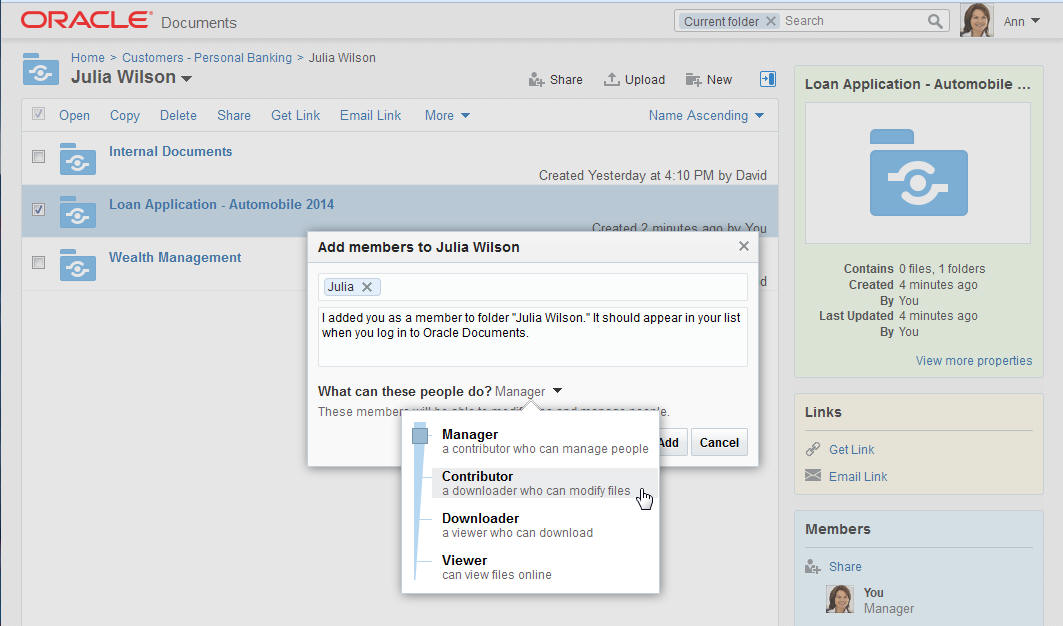


* 1. Navigate to the folder Julia Wilson: **Home > Customers – Personal Banking > Julia Wilson**.



Notice that the Loan Application – Automobile 2014 folder has a recent timestamp since you just uploaded this folder/files.

1. Ann shares the Loan Application folder with Julie, giving her access to view and upload content.
   1. Select the check box for the Loan Application folder.
   2. Select **Share** from the menu of options.
   3. In the dialog that opens, begin to enter **Julia**. Select user **julia@avifinancials.com**.
   4. From the drop-down list for user access, choose **Contributor**.



**Note:** This Share link will share the enclosing folder. In this scenario, we want to share the **selected** folder only.

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* 1. Click **Add**. Julia receives an email that Ann has made her a member of this folder.

1. As Ann, log out of Oracle Documents.

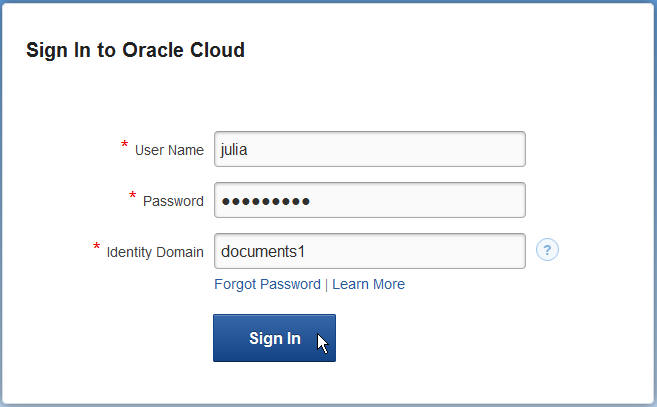
Working with Content Using the Web UI

As a banking customer, Julia logs into the AviFinancial website. We don’t expect Julia to have desktop or mobile access to Oracle Documents, so all of her role in this exercise occurs through the web UI. Julia accesses the web browser from her laptop. Alternatively, Julia could also access the web browser from a mobile device.

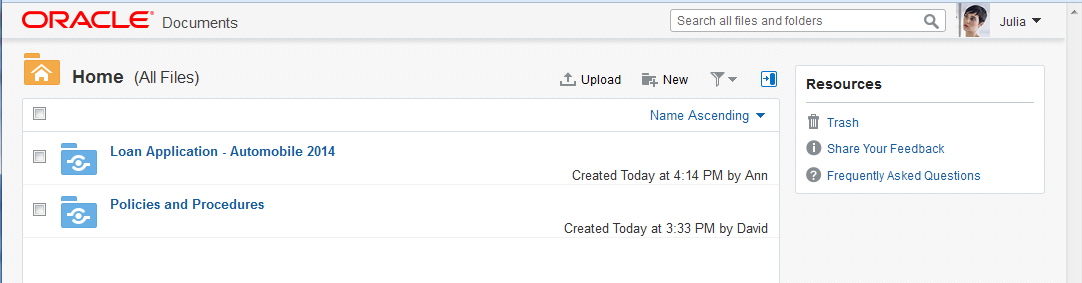
In this part of the hands-on lab, Julia downloads the loan application, and uploads the completed application along with other documents, including pictures of the car and the sales contract.

1. Julia has received Ann’s e-mail that a new Loan Application folder has been created. She logs in to Oracle Documents to access the new shared folder.

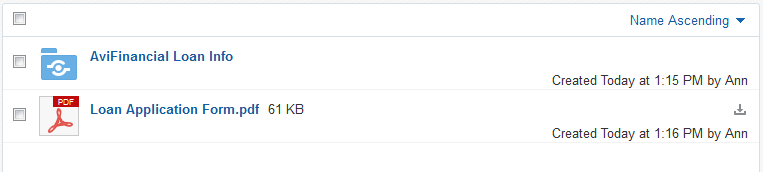
Using Julia’s credentials, log in to Oracle Documents.



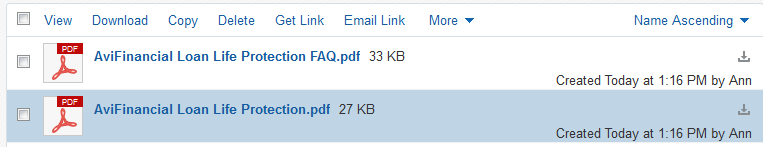
The Home screen should look like this:



1. Julia navigates to the Loan Information folder and reviews the AviFinancial Loan Life Protection document.
   1. Click the **Loan Application – Automobile 2014** link to open the folder, and then click **AviFinancial Loan Info** folder to open it.

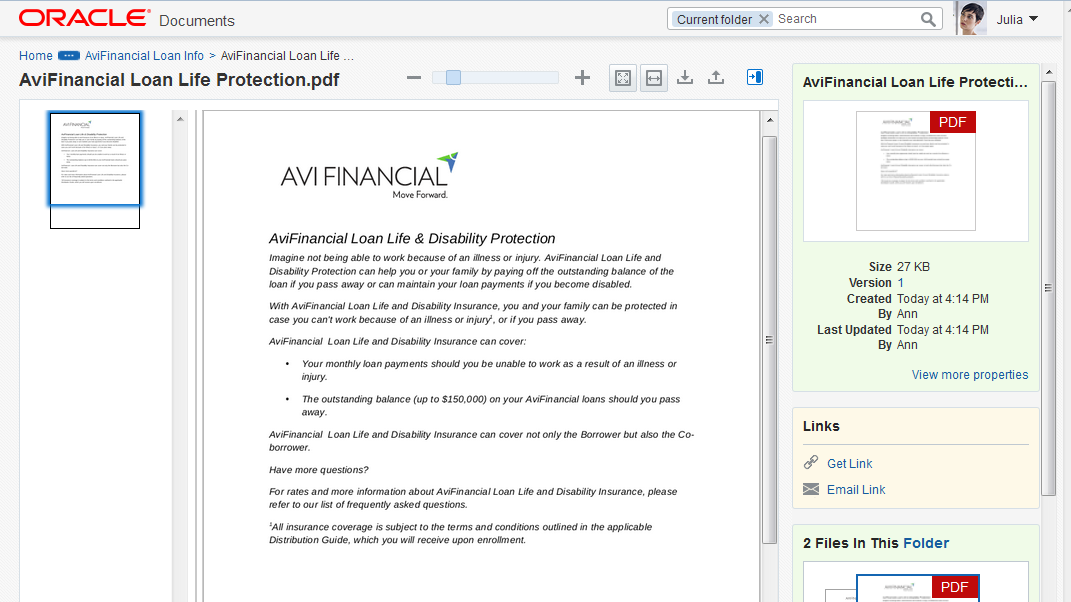


* 1. Now click the link for **AviFinancial Loan Life Protection.pdf**.



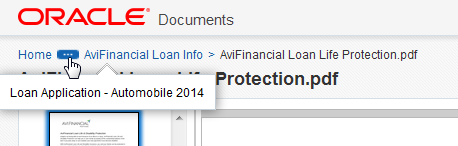
Notice that the document can be previewed directly from the web. You do not have to download the document to your local machine and open it in its native application.

Zoom controls

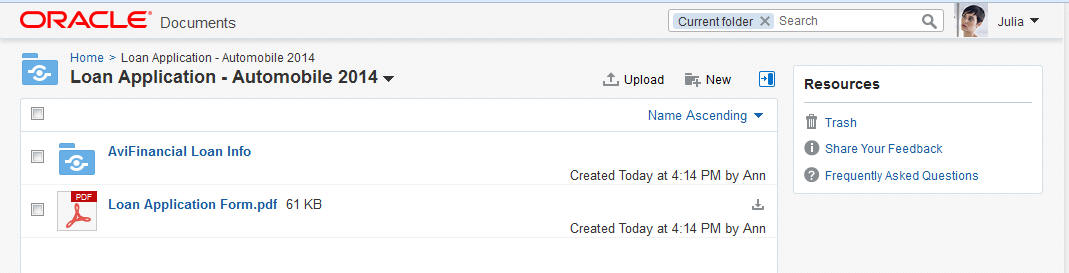


Hide right side panel

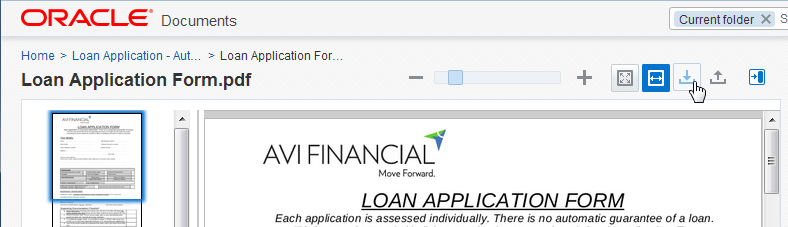
* 1. Navigate back to the **Loan Application – Automobile 2014** folder by using the breadcrumbs.



1. Next, Julia reviews the loan application form. She downloads the form so that she can fill out the application as Ann directed.
   1. Click the link for Loan **Application Form.pdf**.



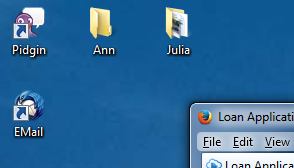
* 1. Click the **Download** icon and save the file to your desktop.



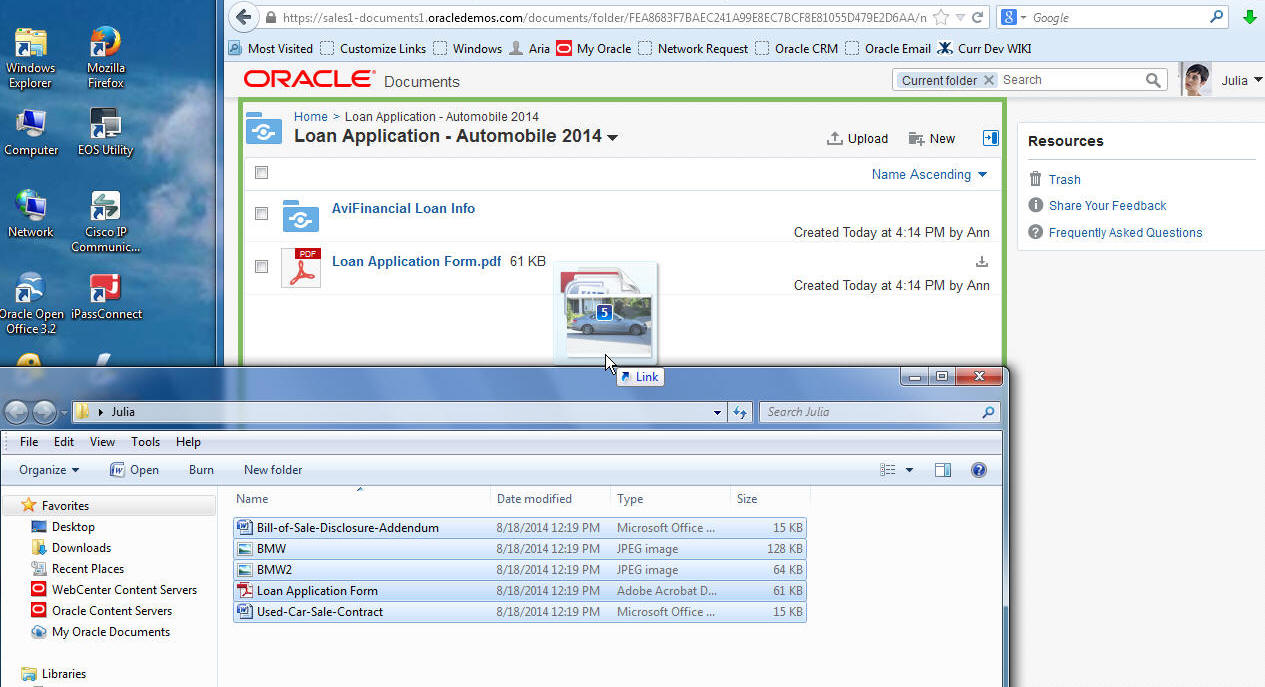
1. Julia needs to upload information about the car she wishes to finance. She has pictures and a number of documents from the seller, and her completed loan application form. Julia selects all the information she has on the car (pictures and documents) and drags-and-drops them to the folder.

As an alternative, Julia can click Upload from the browser to upload the same files.

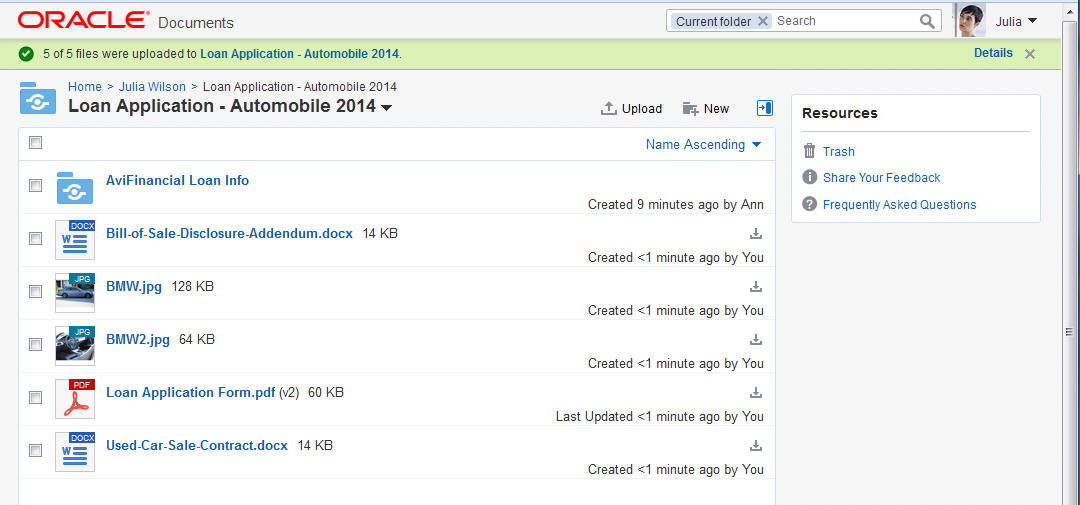
* 1. Rearrange your web browser window so that you can see the portion of your desktop where the Ann and Julia folders are. Open the **Julia** folder.



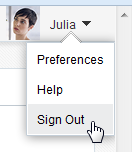
* 1. Open the **Julia** folder. Select all five (5) content items in the Julia Folder and drag and drop them into the Loan Application – Automobile 2014 folder in your browser.



* 1. Confirm that the files have been successfully uploaded. Note that the Loan Application Form document shows **v2**. The original has been replaced with a new version that you just uploaded.



* 1. As user Julia, log out of Oracle Documents.



Accessing Content from Your Mobile Device

Ann has left the office so she doesn’t have access to her desktop anymore, but she can still review Julia’s documents from her mobile device and upload a final loan payment schedule.

The Oracle Documents Cloud Service mobile applications are available for iOS and Android. Access your Oracle Documents account from your iPhone, iPad, or Android device: search, browse, read, download, and upload files on the go. The mobile applications are distributed through the Apple App Store and the Google Play Store, respectively.

[Apple App Store Download Badge](https://itunes.apple.com/us/app/oracle-documents/id890867943?mt=8)   [**Download Oracle Documents Cloud Service for iOS**](https://itunes.apple.com/us/app/oracle-documents/id890867943?mt=8)   
  
 [Google Play Download Badge](https://play.google.com/store/apps/details?id=com.oracle.webcenter.cloud.documents.android)   [**Download Oracle Documents Cloud Service for Android**](https://play.google.com/store/apps/details?id=com.oracle.webcenter.cloud.documents.android)

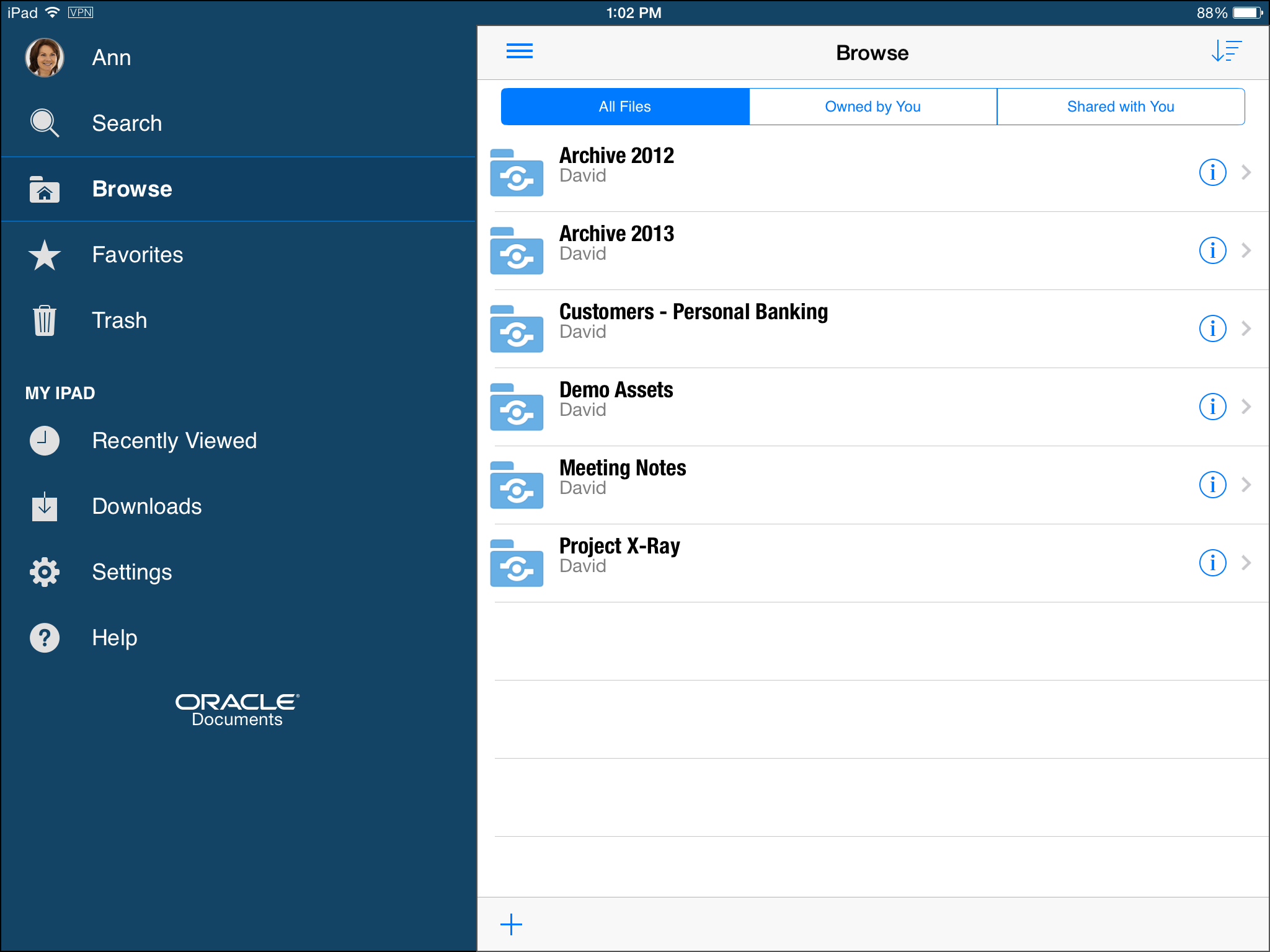
Configure the mobile app to connect to your instance of Oracle Documents.

Open the Ann folder on your desktop. Locate Loan Payment and Amortization Schedule.pdf and e-mail it to yourself the using your personal account. Ensure that you can access the email attachment from your mobile device.

In this section of the lab, Ann uses her iPad.

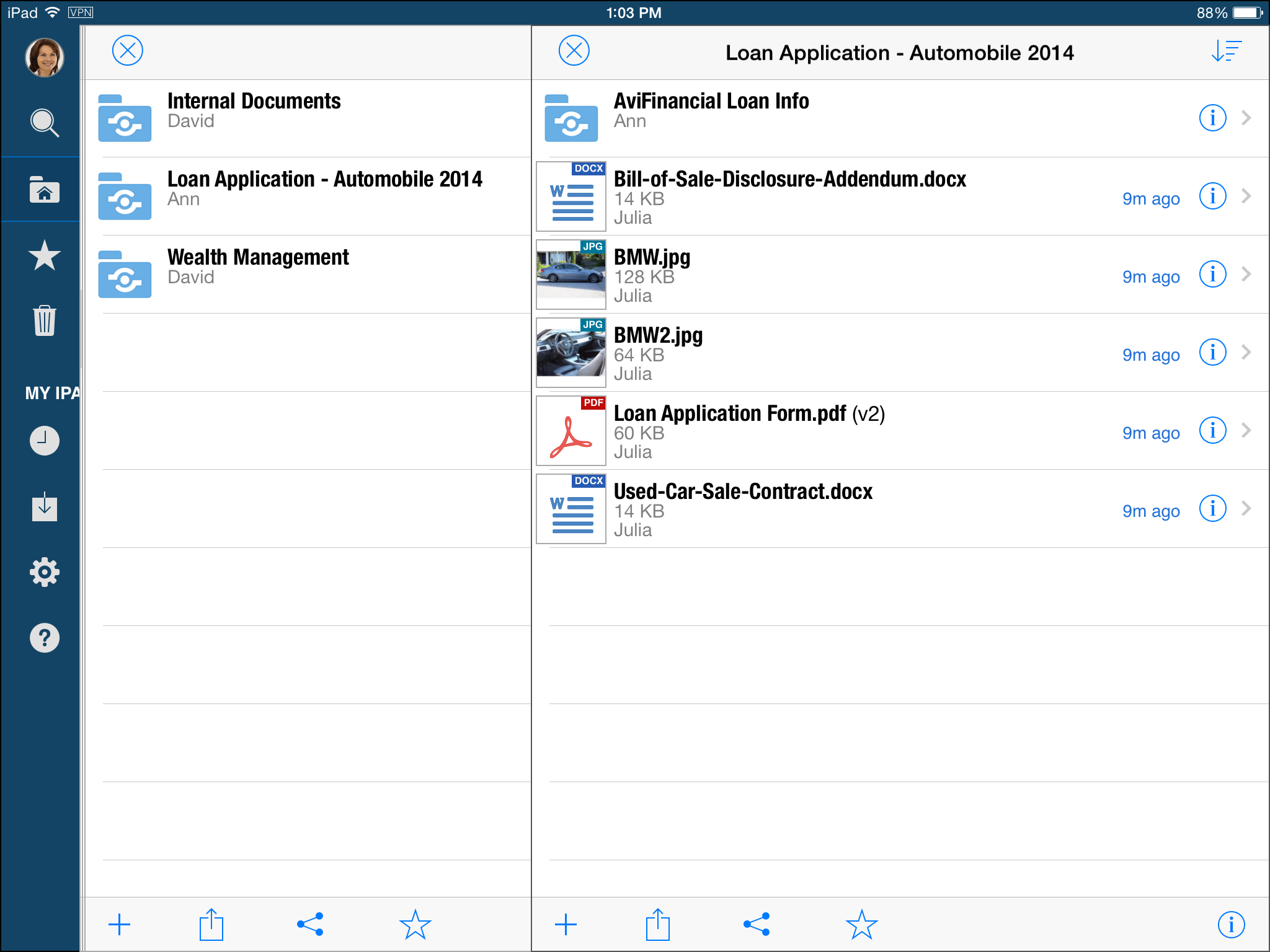
1. As user Ann, access Oracle Documents Cloud using a mobile device.

Tap **Oracle Documents** to open it. The app opens with the Browser screen. You can swipe the Browse screen to the right to expose the navigation menu.

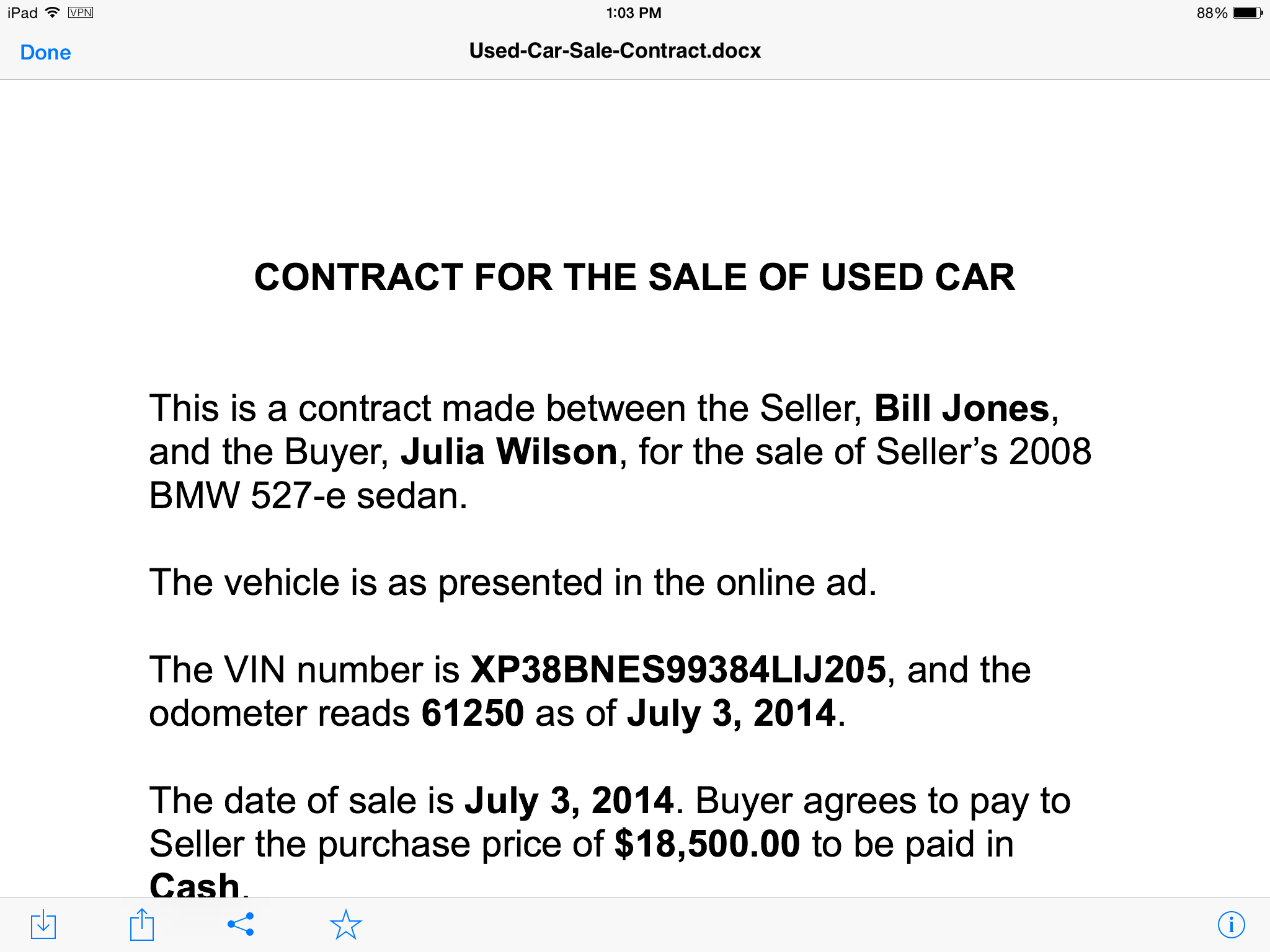


1. Navigate to Julia Wilson’s loan application: **Customers – Personal Banking > Julia Wilson > Loan Application – Automobile 2014**. **Hint:** Tap each folder link to open.

Ann sees that Julia has uploaded content.

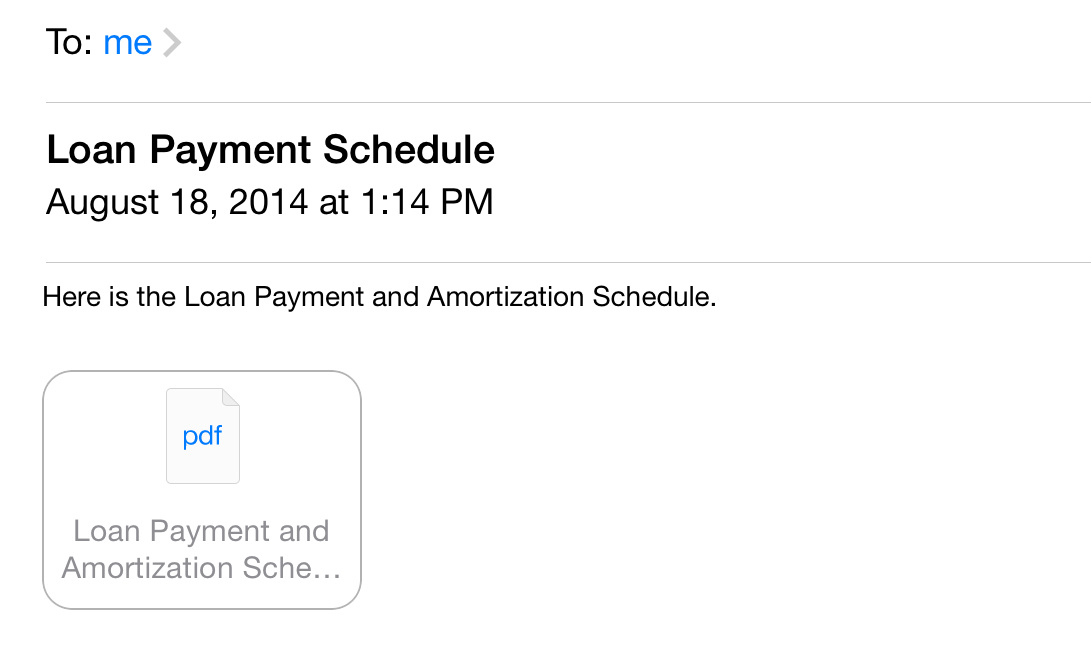


Tap **Used-Car-Sales-Contract.docx** to open and review it. Note that there is no need to download the document; Ann can preview it just as she can in a web browser.

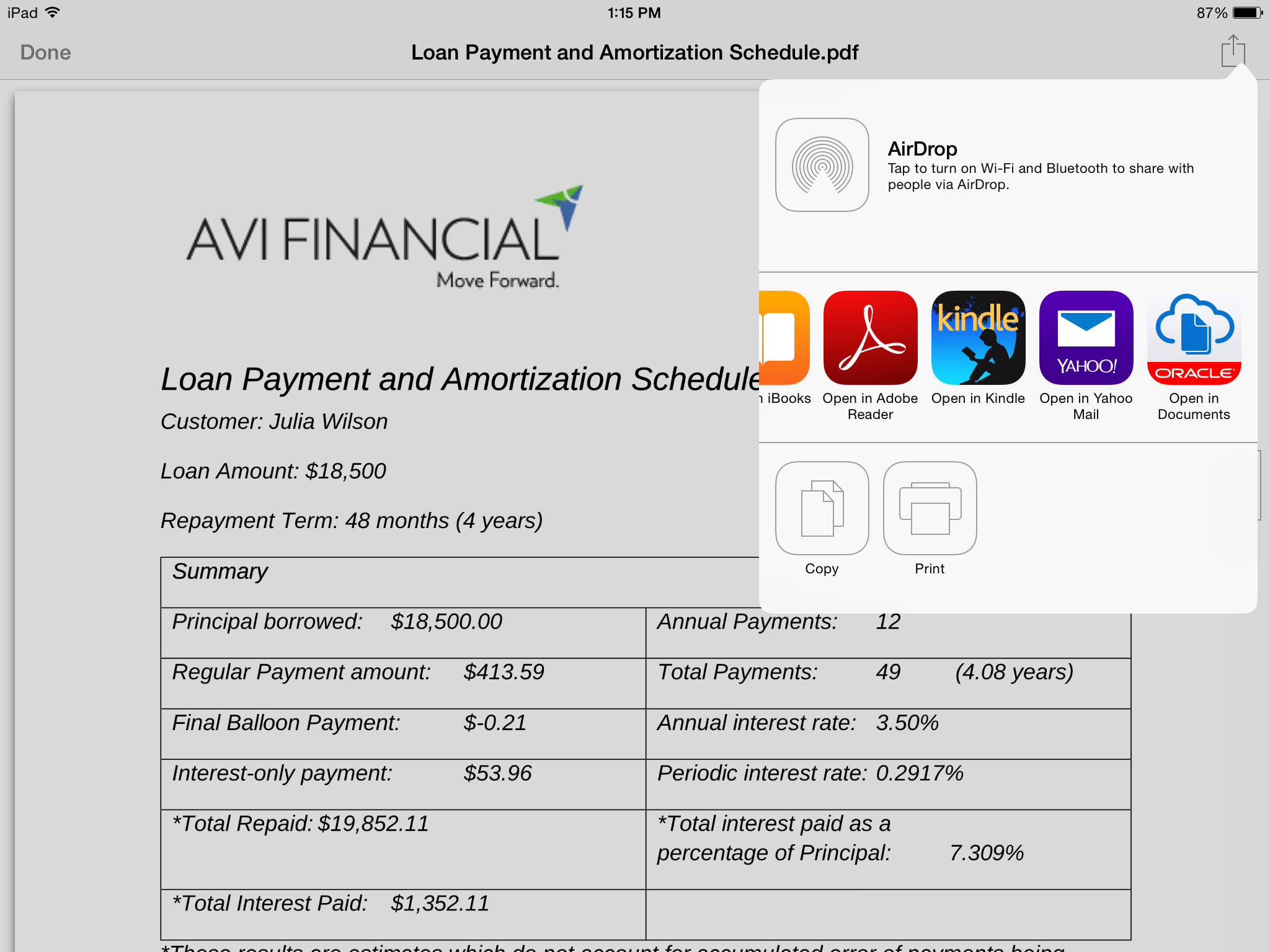


Tap **Done** to close the document.

1. Ann approves Julia’s loan. When AviFinancial emails the loan repayment schedule, Ann opens the attachment, and then opens the document directly in Oracle Documents.
   1. Navigate to the email client where you sent yourself the attachment in the setup for this section of the lab.

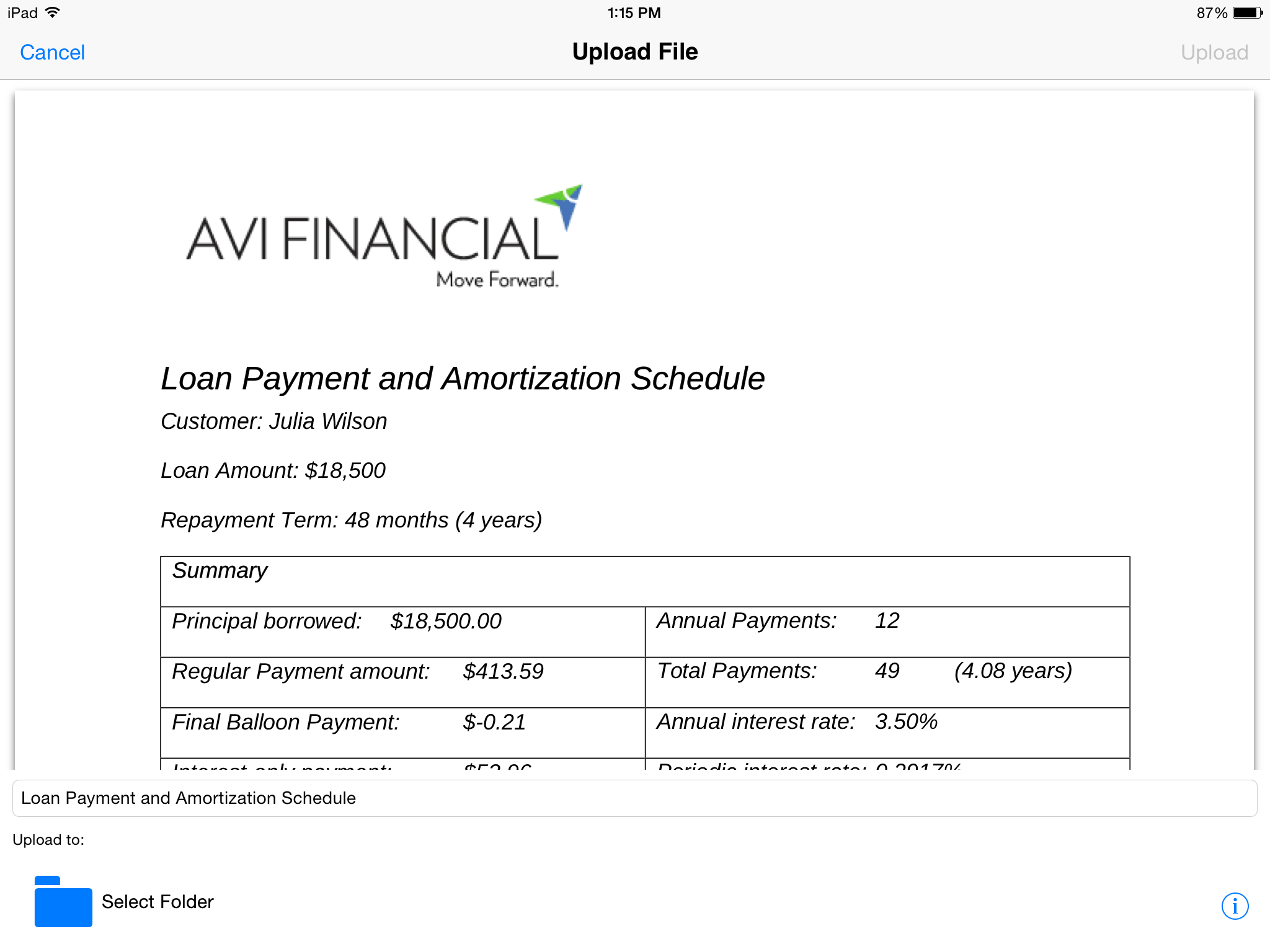


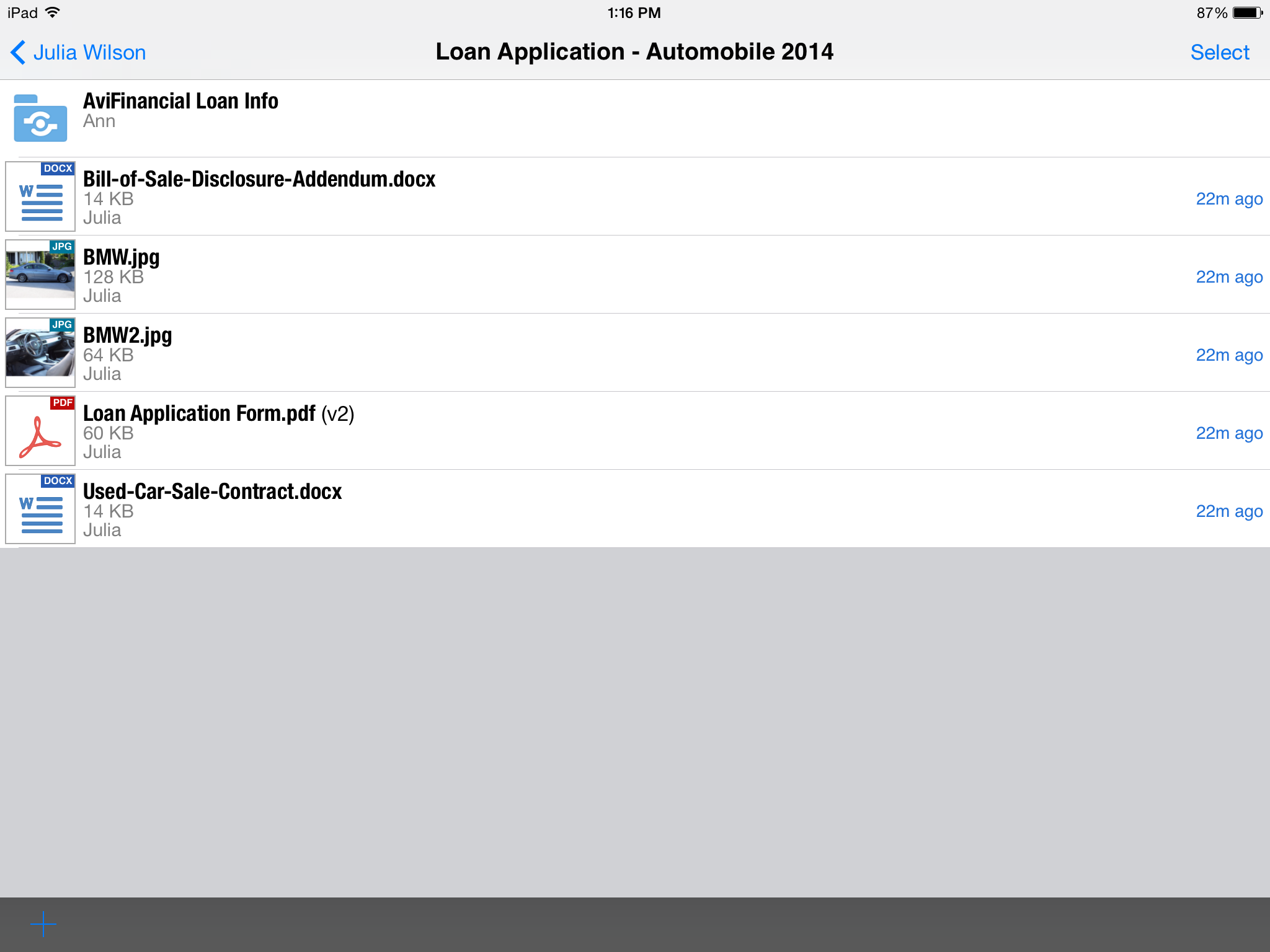
* 1. Tap the **Download / Open With** icon in the upper right section of the screen, and choose **Oracle Documents** to open it.



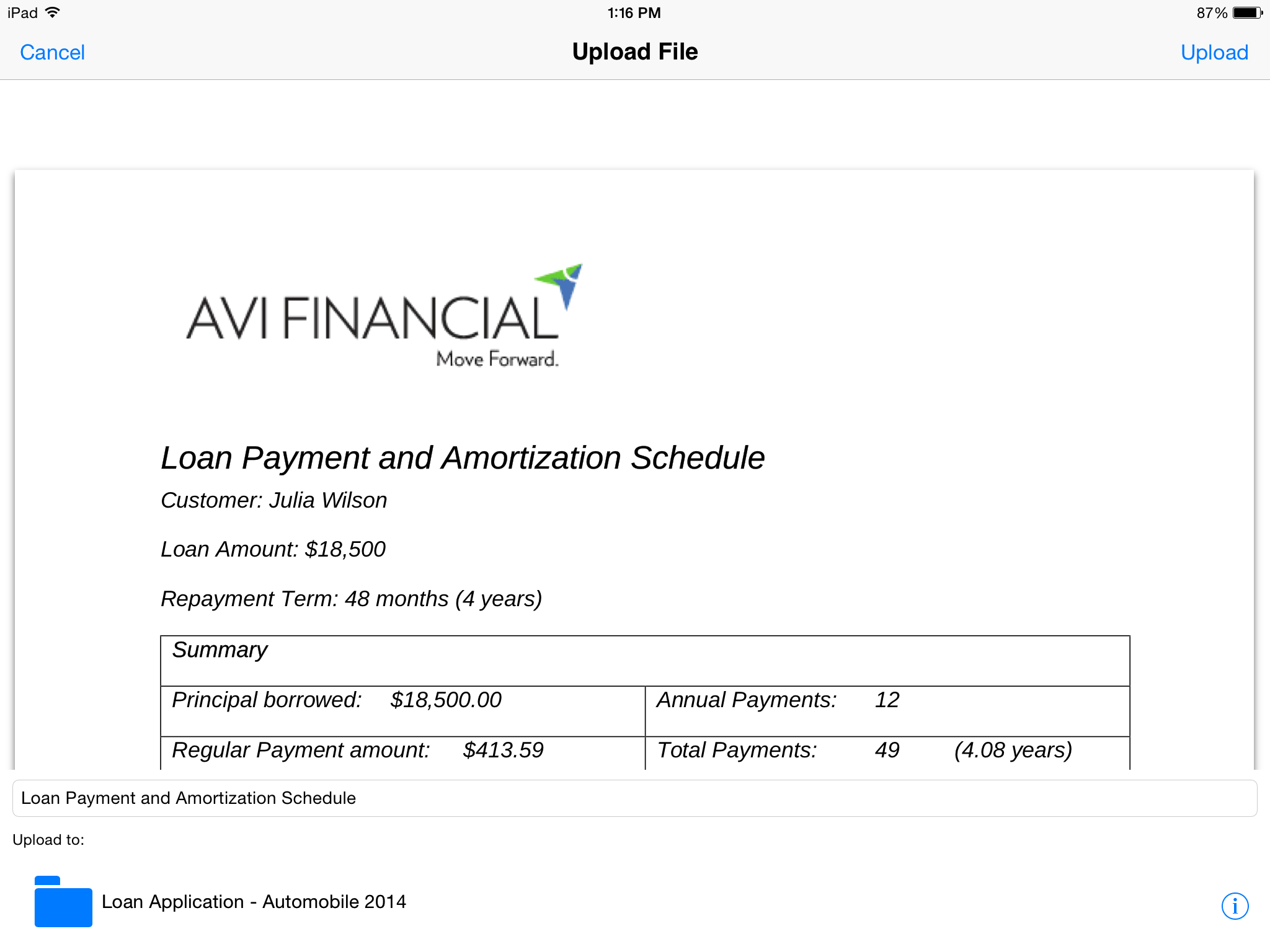
* 1. Ann navigates to the Loan Application folder so she can upload Loan Payment and Amortization Schedule there.

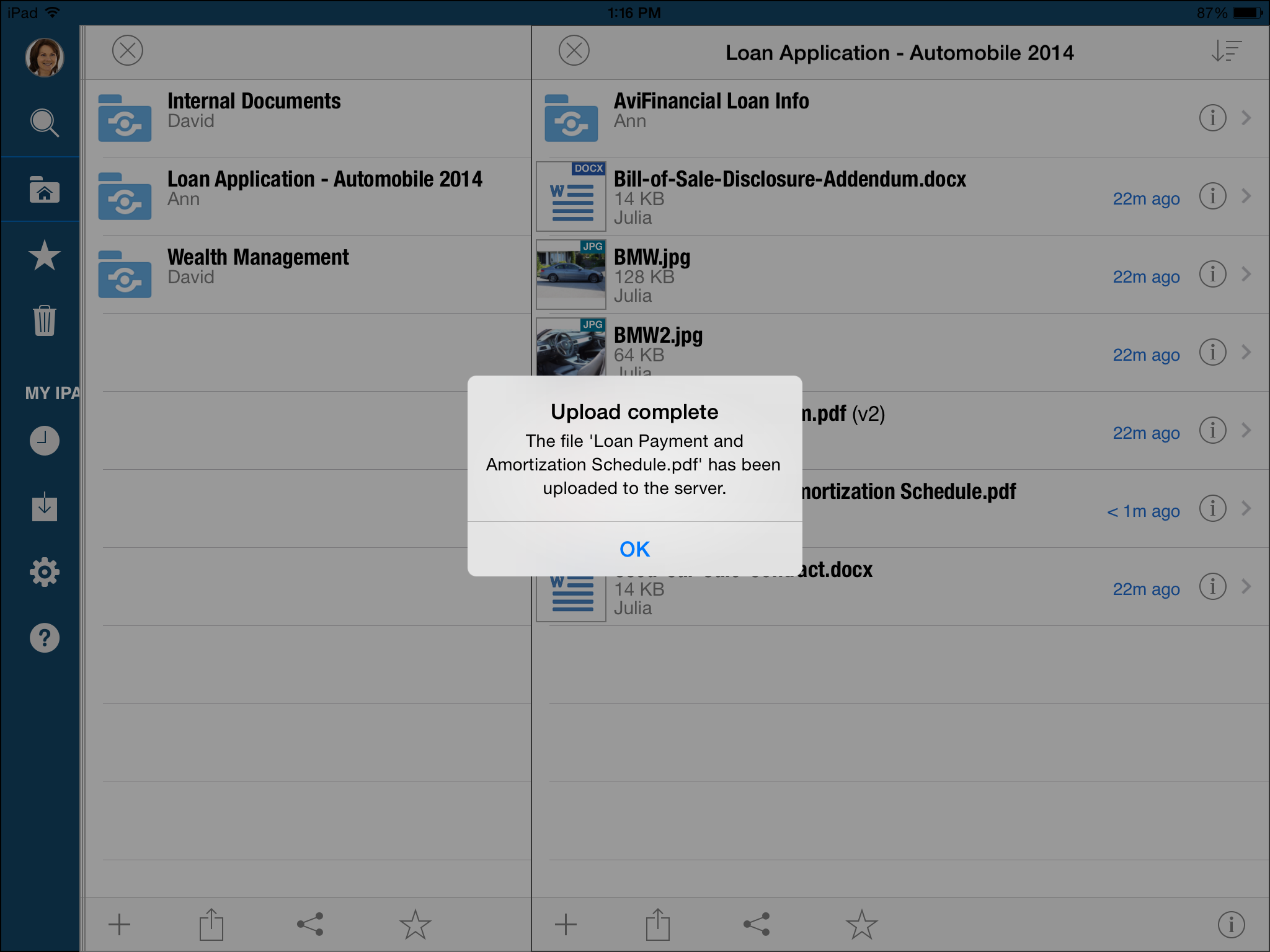
When the document opens in Oracle Documents, tap **Select Folder**, and then navigate to **Loan Application – Automobile 2014**. Tap **Select**.



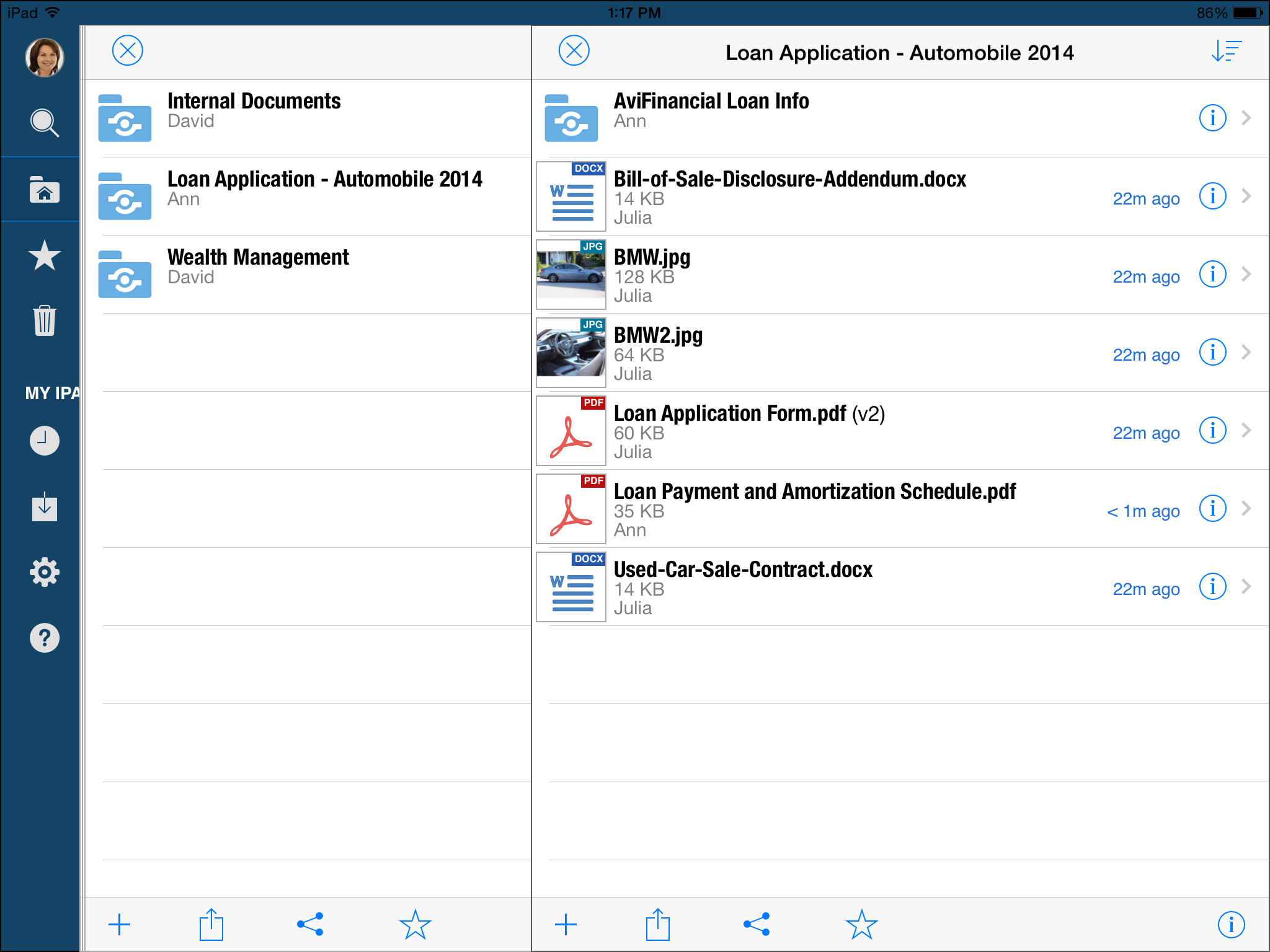


* 1. Tap **Upload** to complete the process. The file uploads and you will see a confirmation. Tap **OK** to confirm.

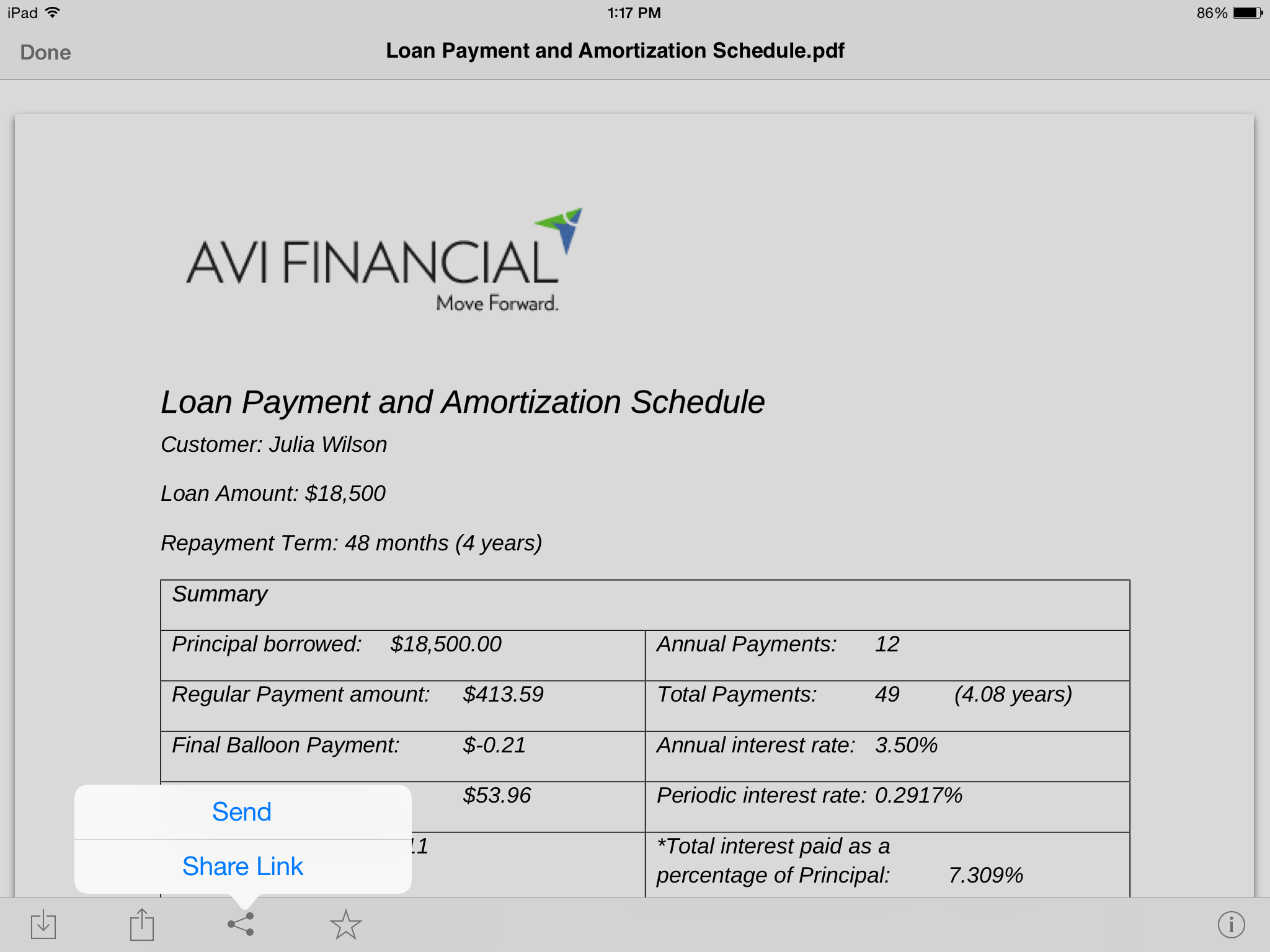




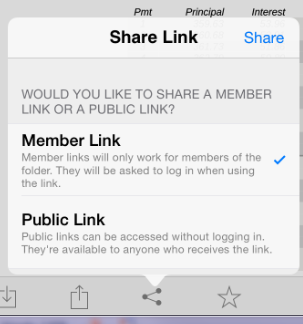
1. Now that the document is uploaded to Oracle Documents, Ann sends Julia a link to the document to share the good news that the loan is approved.
   1. Tap the document to open it, or tap the **i** icon to display the document’s properties.



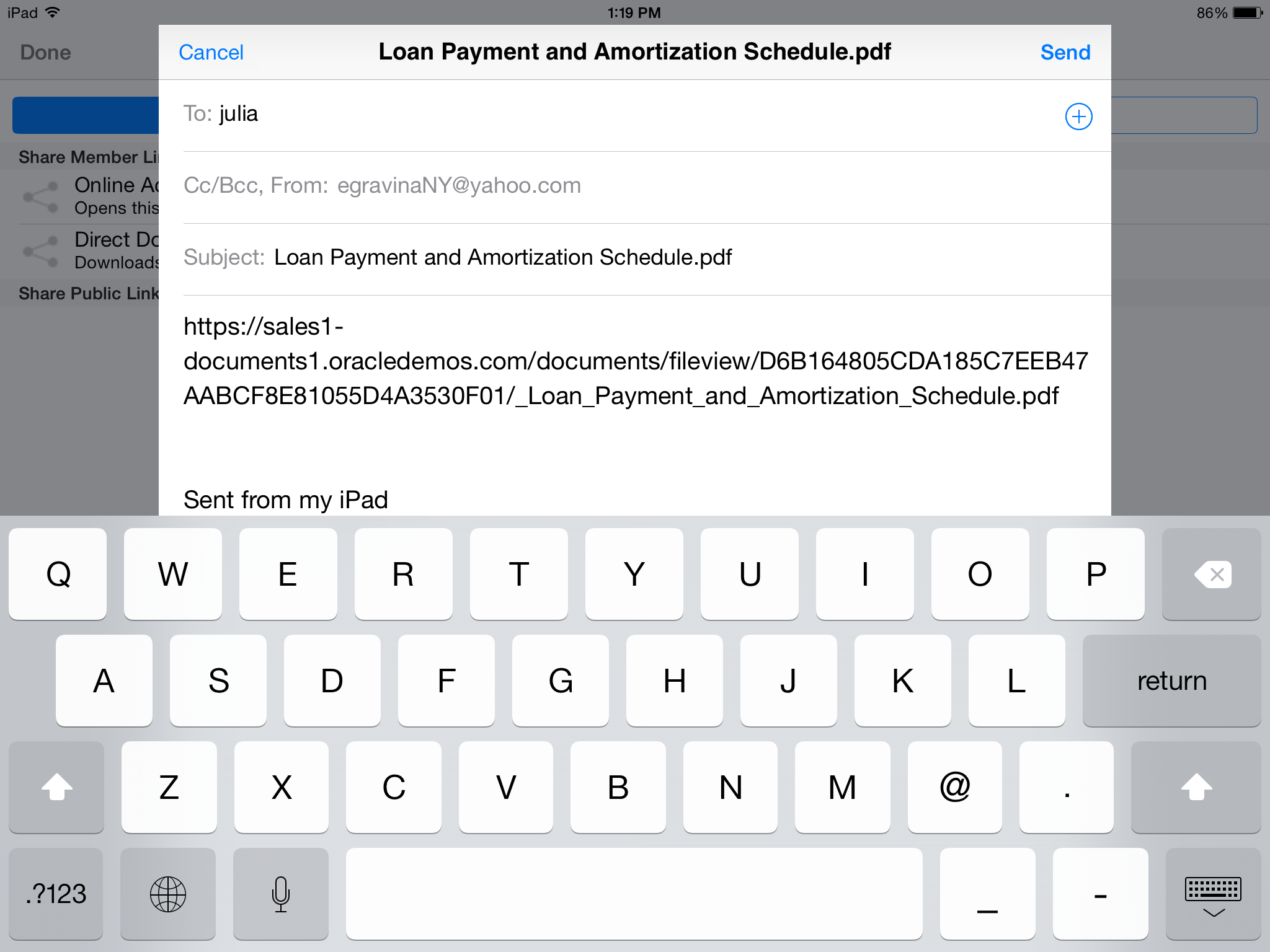
* 1. Tap the **Link** icon, and then tap **Share Link**.



* 1. Since Julia has an AviFinancial account, tap **Member Link**.



* 1. Send an email to Julia to complete the flow.



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