

XML Publisher with Oracle EBS: Automated Document Delivery via Confirmed Email and Fax

Ben Bruno
President, STR Software

Dennis Collins
Systems Analyst, TM GE Automation Systems



About the Speakers

- STR Software
 - Located in Richmond, VA
 - Focused on document delivery solutions since 1988
 - Over 1,150 licenses of AventX in 47 states and 21 countries
 - Over 94% customer retention
 - Oracle Certified Partner with staff of Oracle Certified Professionals
 - OAUG 3-star partner for 2009
 - www.strsoftware.com
- Ben Bruno
 - President and founder of STR Software in May 1986
 - BS & MS in Computer Science from UCLA
 - 804-897-1600 ext. 100 and ben.bruno@strsoftware.com

About the Speakers

- TM GE Automation Systems
 - Located in Salem, VA
 - Joint venture between Toshiba Corporation, Mitsubishi Electric and General Electric
 - Designs and develops advanced automation and drive systems
- Dennis Collins
 - Systems Analyst
 - MS in Accounting Information Systems – Virginia Tech
 - 540-283-2041 and dennis.collins@tmeic-ge.com

Agenda

- Document Delivery Needs and Requirements
- Building a Document Delivery Solution
- Integrating with and without XML Publisher
- Integrating with Delivery Manager
- Integrating with AventX
- Secure, confirmed email; Attachment printing
- Case study from TE GM Automation Systems
- Q&A

“We just upgraded to 11i and would like to use XML Publisher to create customized reports from Oracle EBS and then fax, email, or print them based upon the supplier’s preferred communication method.”

“Is anyone faxing purchase orders and RFQ documents submitted as a batch?”

“How can I fax an Oracle output report?”

“Does anyone know how to integrate a 3rd party fax solution with XML Publisher?”

“We have multiple organizations within our corporation.
Can I apply different forms to our faxed output based
upon the organization and document type?”

“Building a Solution”

Building a Solution: Questions to Ask

- Will documents be in multiple formats, i.e. PDF, Excel, etc?
- Will the user's want to type in the fax number or email address?
Or will the process be completely automated?
- If automated, will the report include many documents in the same request (batch processing)? If yes, then how will the report separate into individual documents?

Building a Solution: Questions to Ask

- Will the user want to attach other documents to the primary document, i.e. terms and conditions, diagrams, etc.?
- Will the document be sent to different destination types, i.e. email, fax, print?
- Will the process require sending documents to multiple recipients?

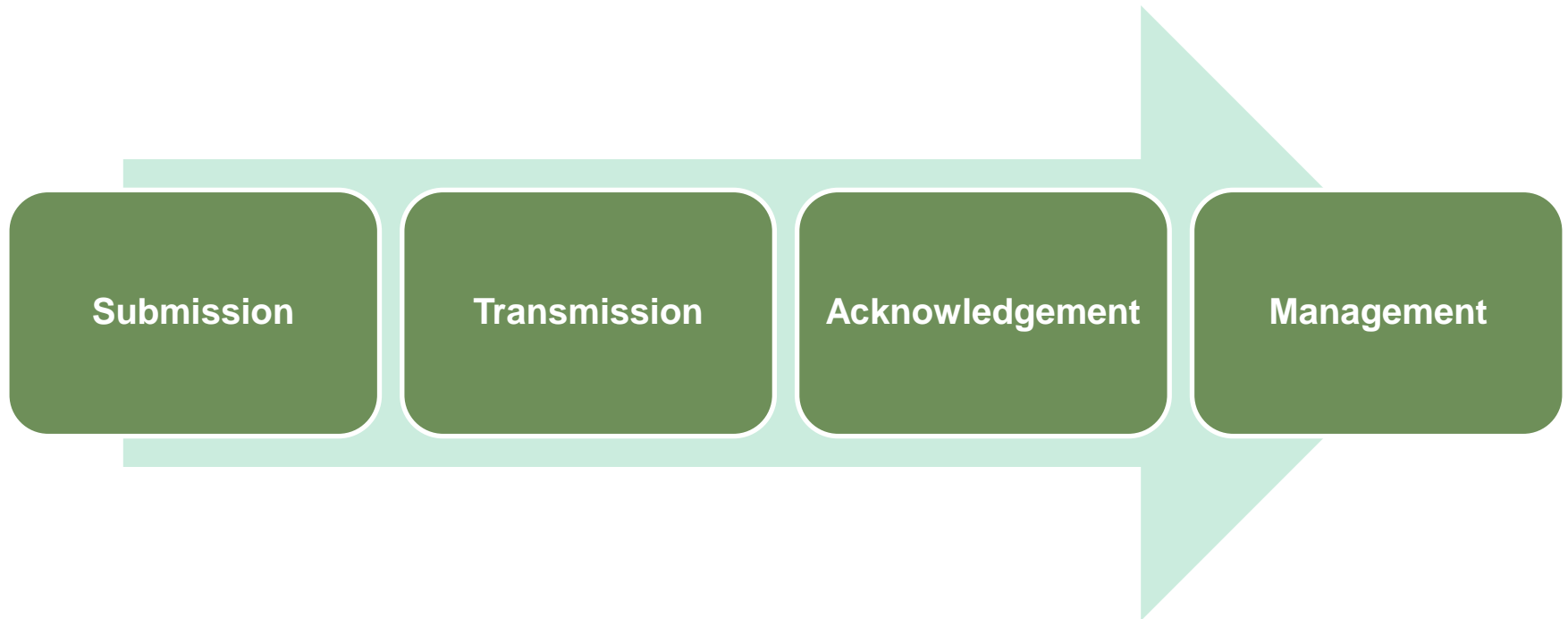
Building a Solution: Questions to Ask

- What method will be used to deliver a confirmation?
 - Individual emails per document
 - Scheduled summary reports
- When should the confirmation be sent?
- What should the confirmation look like?
- Who should receive the confirmation?

Building a Solution: Questions to Ask

- Who will manage failed documents? Or successful documents that need to be transmitted again?
- Where will users manage their documents? Inside or outside of Oracle EBS?
- How long will documents and their transmission history be saved?

Fundamentals of Document Delivery



Oracle EBS Document Submission Options

Document Submission: In Oracle EBS

- Oracle EBS recently added a few options to users for the purchase order report
 - 3 Purchase Order Options:
 - Purchase Order Approval – Workflow
 - Purchase Order Summary – Tools / Communicate
 - Submit Request (“Fax Enable” Fields)
 - XML Publisher Bursting and Delivery

PO Submission: PO Approval Form

Approve Document (Vision Operations) - 4563

Approval Details | Additional Options

Encumbrance

Reserve Unreserve Unreserve Date

Use GL Override Use Document GL Date to Unreserve Accounting Date

Approval

Submit for Approval Forward From

Forward Approval Path

Forward To

Note

Change

Summary

Transmission Methods

Print XML

Fax FAX Number EDI

E-Mail E-Mail Address

OK Cancel

PO Submission: Supplier Sites

Supplier Sites (Vision Operations: USD) - STR Software, 20025

Site Name **RICHMOND** Alternate Name

Country **United States**

Address **11505 Allecingie Parkway** Alternate Address

City **Richmond** State **VA** Postal Code **23235**

Province County

Language Inactive On

General | Contacts | Accoun... | Control | Payment | Bank A... | EDI | Invoice ... | Withhol... | Tax Re... | Purchas...

Site Uses

Pay Purchasing

Primary Pay RFQ Only

Procurement Card

Customer Number

Shipping Network Location

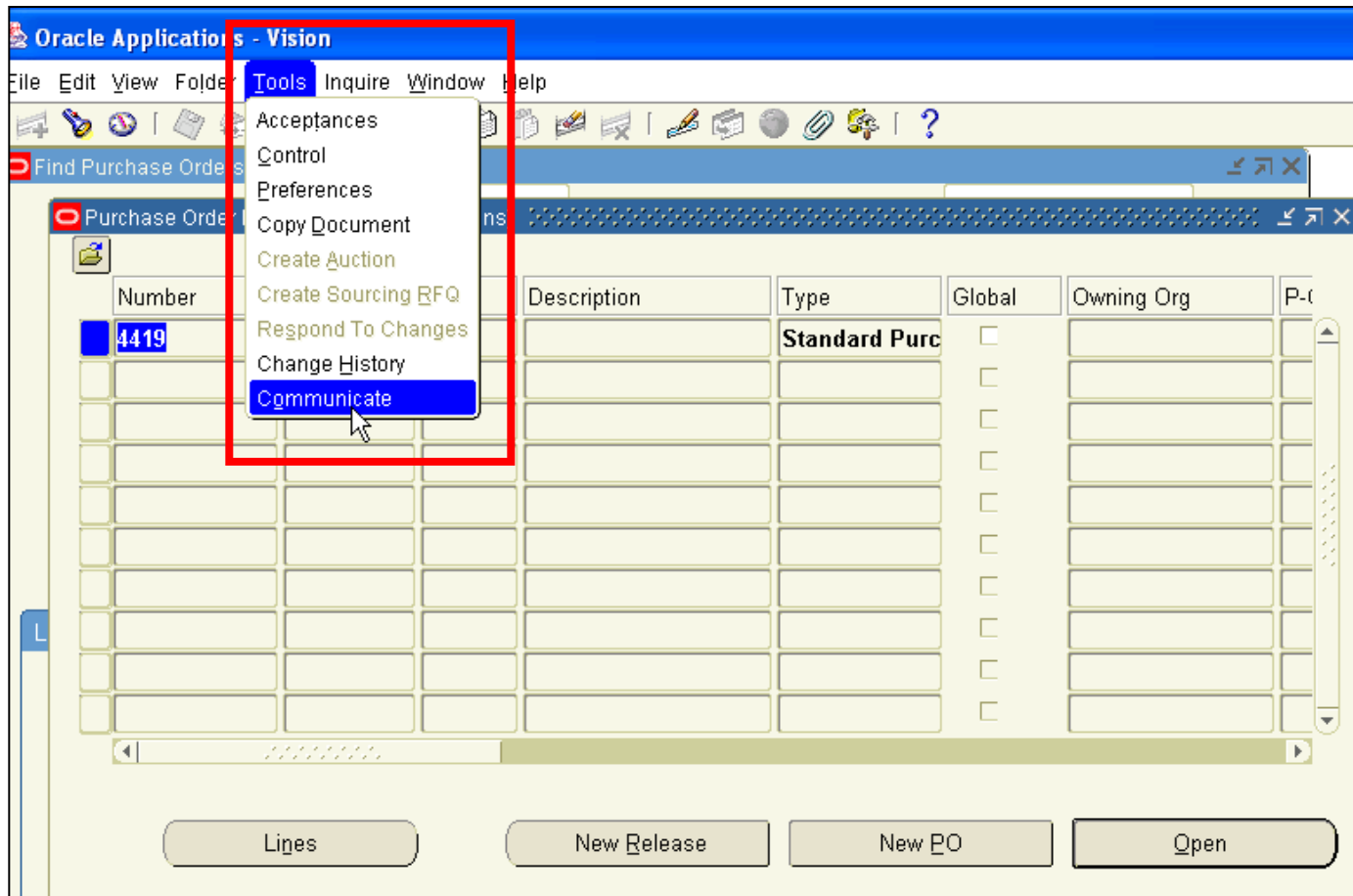
Supplier Notification Method **E-mail**

Communication

Voice Area Code Number Telex

Fax **804** **897-1638** E-mail **sales@strsoftware.com**

PO Submission: PO Communicate



PO Submission: PO Communicate

Communicate (Vision Operations)

Select one of the communication methods below :

Communication

- Print
- Fax
- Email

Fax number

Email Address

PO without contract terms

Language

OK Cancel

PO Submission: Submit Request

Navigator - Purchasing Super User

Functions Documents Processes

Requests: Submit Submit Request

Run this Request...

Name **Printed Purchase Order Report(Portrait)**

Parameters

Language **American English**

Conv...

Language Settings... Debug Options

At these Times...

Run the Job **As Soon as Possible**

Schedule...

Upon Completion...

Save all Output Files

Layout

Notify

Print to **development**

Options...

Help (C) Submit Cancel

PO Submission: Submit Request

Parameters

Buyer Name, Employee Number:

Purchase Order Numbers From:

To:

Release Numbers From:

To:

Release Dates From:

To:

Approved:

Test:

Print Releases Option:

Sort By:

Dynamic Precision Option: 9,999,999.99

Fax Enable: Yes

Fax Number:

Print Canceled Lines:

OK

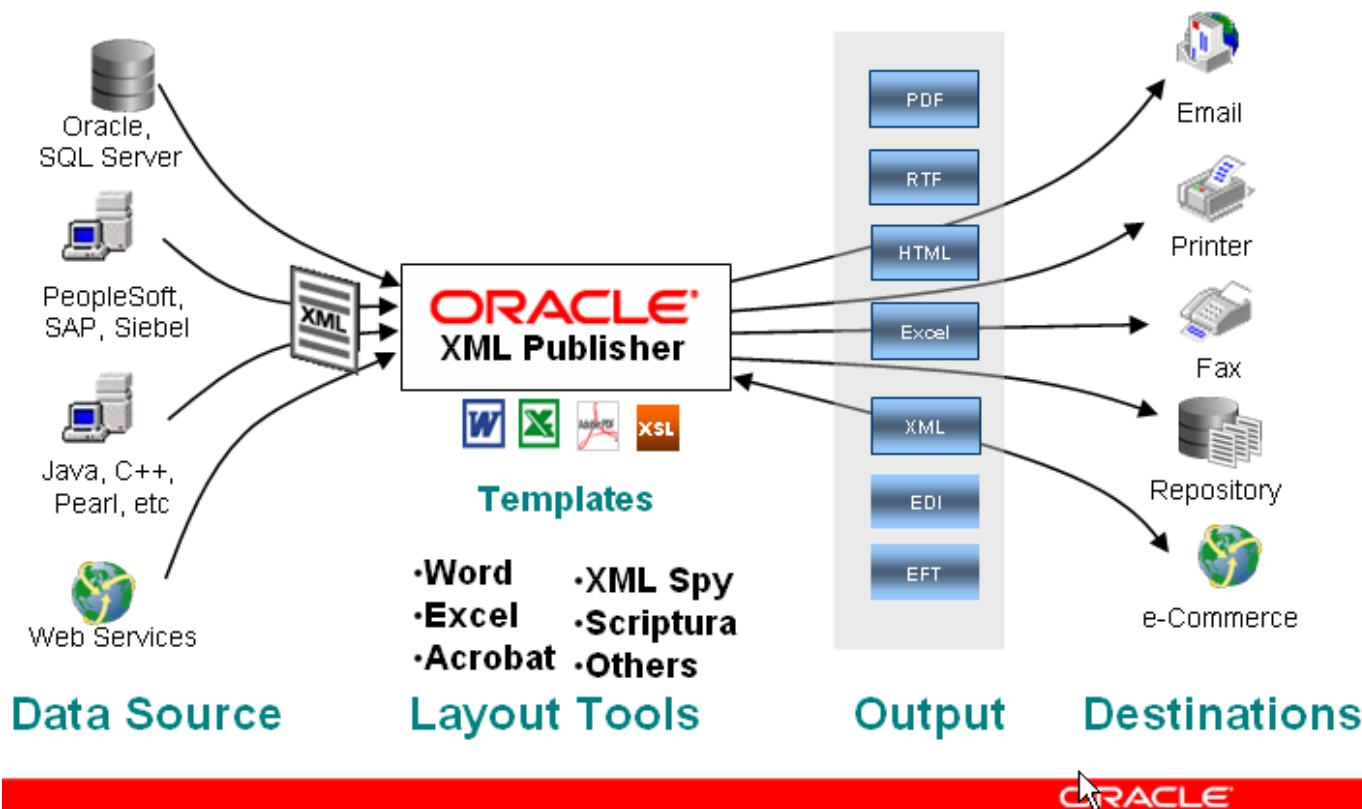
“Fax Enable” Features

- Limited to Only Purchase Orders
- No Email
- Fax Fields Not Pre-Populated
- Only One Purchase Order

Oracle EBS Document Formatting and Delivery with XML Publisher

Document Delivery with XML Publisher

From Data to Destination



PO Transmission: Email – Without XML Publisher

Vision Services 90 Market Street Philadelphia , PA 19103-4211 US		<u>SHIP TO</u> District of Columbia Office used in Services SoB 1401 Pennsylvania Avenue Washington , DC 20002 US		<table border="1"> <tr> <th colspan="2">Purchase Order</th> </tr> <tr> <td>PURCHASE ORDER NO. 3226</td> <td>REVISION 0</td> </tr> </table>		Purchase Order		PURCHASE ORDER NO. 3226	REVISION 0
Purchase Order									
PURCHASE ORDER NO. 3226	REVISION 0								
<u>SUPPLIER</u> Office Supplies, Inc. 3605 Warrensville Center Road Shaker Heights OH 44122		<u>BILL TO</u> District of Columbia Office used in Services SoB 1401 Pennsylvania Avenue Washington, DC 20002 US		<table border="1"> <tr> <td>DATE OF ORDER 10-JUN-04</td> <td>BUYER Chappell, Mr. Ted</td> </tr> <tr> <td>DATE OF REVISION</td> <td>BUYER</td> </tr> </table>		DATE OF ORDER 10-JUN-04	BUYER Chappell, Mr. Ted	DATE OF REVISION	BUYER
DATE OF ORDER 10-JUN-04	BUYER Chappell, Mr. Ted								
DATE OF REVISION	BUYER								
CUSTOMER ACCT. NO.	SUPPLIER NO. 1008	PAYMENT TERMS 30 Net (terms date + 30)	FREIGHT TERMS Due	F.O.B. Origin	SHIP VIA DHL				
CONFIRM TO/TELEPHONE			REQUESTOR/DELIVER TO						
Line	Part Number / Description	Delivery Date	Quantity	UOM	Unit Price	Tax	Extended Price		
1	X Business Cards, Box of 250								
	Ship To Please refer to Ship To Address at top of page		2	BOX	(USD)35	N	(USD)70		
Total							(USD)70		

- HTML in Email Body
- Fax and Email Different Look

PO Transmission: Fax Without XML Publisher

```

{{(begin)}}{{(fax 804-897-1638)}}{{(doctype pofax)}}
                                     4565    0      1

                                     3455 108th Avenue
                                     Seattle, WA 98101
                                     United States

STR Software                          90 Fifth Avenue
11505 Allecingie Parkway               New York, NY 10022-3422
Richmond, VA 23235                    United States
United States

                20025      12-OCT-06 B Lowe


45 Net (terms date + 45)              Origin

Due

All prices and amounts on this order are expressed in : US dollar
1  BUSCARDS                          3.00 BOX      35      105.00  N
Business Cards, Box of
250
o SHIP TO:
  Address at top of page
    
```

- Text output has a few “Fax Tags” in header
- Requires 3rd party fax solution to process “Fax Tags”

PO Transmission: Email – With XML Publisher



Vision Operations
90 Fifth Avenue
New York, NY 10022-3421
United States


Supplier:
Office Supplies, Inc.
3605 Warrensville Center Road
Shaker Heights, OH 44122
United States

PO Number	Revision	Page
4562	0	1

Ship To:
90 Fifth Avenue
New York, NY 10022-3422
United States

Bill To:
90 Fifth Avenue
New York, NY 10022-3422
United States

Supplier No. 1009	Order Date 06-OCT-2006	Revision Date	Buyer Green, Terry
Payment Terms 30 Net (terms date + 30)	Ship Via UPS	FOB Origin	

Line	Part Number / Description	Quantity	UOM	Unit Price	Tax	Amount
1	BUSCARDS Business Cards, Box of 250	2	BOX	35	N	70.00
PO Number must appear on all shipping papers, packages, bills of lading, & invoices.				Total:		70.00 (USD)
Subject to attached Terms & conditions.				By 		

This template was created by STR Software to demonstrate document delivery of XML Publisher output using our AventX Oracle Connector. For more information contact: sales@strsoftware.com or (804) 897-1800 extension 2

- PDF Attachment
- Fax and Email Look the Same

PO Transmission: Fax – With XML Publisher

```
{ {BEGIN} }
{ {FAX 804-897-1638} }
{ {ATTACH /disk1/oraapps/vis1comm/admin/out/VIS1_grimlock/o2842252.out} }
{ {END} }
```

Separate fax
command file
 Separate PDF
data file

- Requires 3rd party fax solution to process command file



PO Number	Revision	Page
4562	0	1


Vision Operations
90 Fifth Avenue
New York, NY 10022-3422
United States

Ship To:
90 Fifth Avenue
New York, NY 10022-3422
United States

Supplier:
Office Supplies, Inc.
3605 Warrensville Center Road
Shaker Heights, OH 44122
United States

Bill To:
90 Fifth Avenue
New York, NY 10022-3422
United States

Supplier No. 1009	Order Date 06-OCT-2006	Revision Date	Buyer Green, Terry
Payment Terms 30 Net (terms date + 30)	Ship Via UPS	FOB Origin	

Line	Part Number / Description	Quantity	UOM	Unit Price	Tax	Amount
1	BUSCARDS Business Cards, Box of 250	2	BOX	35	N	70.00
					Total:	70.00 (USD)
PO Number must appear on all shipping papers, packages, bills of lading, & invoices.						
Subject to attached Terms & conditions.				By 		

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XML Publisher PO Integration: Recap

- For non XML Publisher purchase orders, fax and email have a different look and feel.
- Easy setup to concurrent program to format document via XML Publisher
- For email, delivery is handled through a separate process, Workflow Mailer
- For fax, commands are simply written out in order for a 3rd party solution to take over and actually fax the document.

XML Publisher Bursting and Delivery

- “Bursts” data stream into individual documents.
- Delivers finished XML Publisher formatted documents through “Channels”
 - Printer
 - Fax
 - Email
 - WebDAV
 - HTTP/HTTPS
 - FTP

XML Publisher Bursting and Delivery: Setup

ORACLE XML Publisher Templa

[Data Definitions](#) >

View Data Definition: XML STR Software Printed Purchase Order Report(Portrait)

General

Name: XML STR Software Printed Purchase Order Report(Portrait) Code: POXPRPOPX
Application: Purchasing Start Date: 07-Apr-2005
End Date:
Description: XML Printed Purchase Order Portrait Output for STR Software

Files

XML Schema

Data Template

Preview Data: pop_grimlock.txt

Bursting Control File: po_portrait_burst.xml

[Return to Data Definitions](#)

Add Bursting Control
File to Data Definition

XML Publisher Bursting and Delivery: Setup

- Bursting Control File – Email Delivery

```

<?xml version="1.0" encoding="UTF-8" ?>
- <xapi:requestset xmlns:xapi="http://xmlns.oracle.com/oxp/xapi">
- <xapi:request select="/POXPRPOP2/LIST_G_INIT_INFO/G_INIT_INFO/LIST_G_HEADERS/G_HEADERS">
- <xapi:delivery>
- <xapi:email server="mail.strsoftware.com" port="25" from="AccountPayables@strsoftware.com">
- <xapi:message id="{POH_PO_NUM}" to="{POH_PO_TOADDRESS}" cc="{POH_PO_CCADDRESS}" subject="Purchase Order #{POH_PO_NUM}"
  attachment="true" content-type="text/html">
  <![CDATA[ <html><head><style type="text/css"> body {font-family:Arial}</style></head><body>
  <br/><br/><p>Please find the attached Purchase Order #{POH_PO_NUM}.<br/><br/>

  <br/>Regards,<br/>
  #{POH_BUYER}
  </p></body></html> ]]>
  </xapi:message>
</xapi:email>
</xapi:delivery>
- <xapi:document output="Purchase Order #{POH_PO_NUM}" output-type="pdf">
  <xapi:template type="rtf" location="/home/faxdev1/axtko/com/strsoftware/axtko/samples/STR_Software_POP.rtf" />
</xapi:document>
</xapi:request>
</xapi:requestset>

```

XML Publisher Bursting and Delivery: Setup

- Bursting Control File – Fax Delivery

```

<?xml version="1.0" encoding="UTF-8" ?>
- <xapi:requestset xmlns:xapi="http://xmlns.oracle.com/oxp/xapi">
- <xapi:request select="/POXPRPOP2/LIST_G_INIT_INFO/G_INIT_INFO/LIST_G_HEADERS/G_HEADERS">
- <xapi:delivery>
- <xapi:fax server="ipp://host:port/printers/axtkocupspriener">
  <xapi:number id="FAX1">${POH_VENDOR_PHONE}</xapi:number>
  </xapi:fax>
</xapi:delivery>
- <xapi:document output-type="pdf" id="FAX1">
  <xapi:template type="rtf" location="/home/faxmgr/axtko/com/strsoftware/axtko/samples/STR_Software_POP.rtf" />
</xapi:document>
</xapi:request>
</xapi:requestset>

```

XML Publisher Bursting and Delivery: Usage

- Step 1: Use Submit Request to run Report as normal.

Submit Request

Run this Request...

Name: **XML Printed Purchase Order Report(Portrait)** [Copy...]

Parameters: **All::897:900::::::Yes::2:No::Yes:No**

Language: **American English** [Language Settings... Debug Options]

At these Times...

Run the Job: **As Soon as Possible** [Schedule...]

Upon Completion...

Save all Output Files

Layout: **XML STR Software POP**

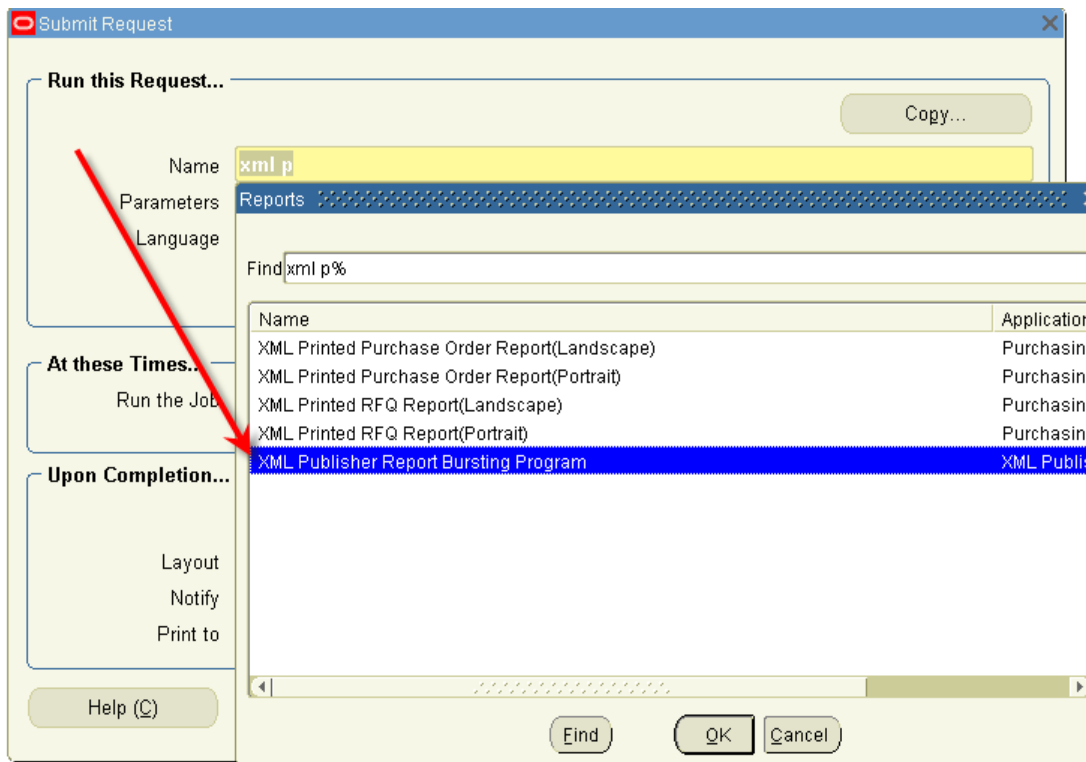
Notify: [Options...]

Print to: **development**

[Help (C)] [Submit] [Cancel]

XML Publisher Bursting and Delivery: Usage

- Step 2: Run 'XML Publisher Report Bursting Program' against previous request.



XML Publisher Bursting and Delivery: Results

- Email:

The screenshot shows an email client interface. At the top, there are fields for 'From' and 'Subject'. Below that, a 'Date: Today' filter is applied. A list of four emails is shown, all from 'AccountPayables@s...' with subjects 'Purchase Order #900', '#899', '#897', and '#898'. The first email is selected. The details of this email are shown below, including the sender 'AccountPayables@strsoftware.com', recipient 'Brent Lowe', and an attachment 'Purchase Order #900.pdf (12 KB)'. The body of the email contains the text: 'Please find the attached Purchase Order #900.' and 'Regards, P Stock'.

XML Publisher Bursting and Delivery: Results

- Fax
 - Output is dependent on Transmitting Software.

XML Publisher Bursting and Delivery: Recap

- Email is robust and full featured.
- Email does not allow for Native Oracle Attachments.
- Fax is dependent on 3rd party to actually deliver document.
- No user interface to type in fax or email addresses for one off deliveries.
- Only allows for one fax number and no other identifying information. i.e. cover page data such as From Company, Subject, Memo, etc...

Integrating with Delivery Manager

Integrating with XML Publisher's Delivery Manager

- What is the “Delivery Manager”
 - A set of JAVA APIs
 - Facilitates the delivery of documents through “Channels”
 - Printer Channel
 - Fax Channel
 - Email Channel
 - WebDAV Channel
 - HTTP / HTTPs Channel
 - FTP Channel
 - “Custom” Delivery Channel

Integrating with XML Publisher's Delivery Manager

- What is needed to integrate with Delivery Manager?
 - Requires a developer with programming knowledge of JAVA and SQL
 - XML Publisher v5.6.2 or higher
 - BI Publisher v10.1.3.2 or higher

Integrating with XML Publisher's Delivery Manager

- What are the steps to integrate with Delivery Manager with EBS?
 - Step # 1 - Install and configure 3rd party packages
 - Step # 2 - Develop Java based classes against XML Publisher Delivery Manager API
 - Step # 3 - Integrate Java classes with Oracle EBS
- Transmission via Fax (Two Options)
 - Integrate with CUPS > efax or FAX4CUPS > Fax Modem
 - Create a “Custom Delivery Channel”
- Transmission via Email
 - Uses standard SMTP calls to Delivery Manager API

Integrating with XML Publisher's Delivery Manager

- Current Fax Limitations when using CUPS
- No user interface to type in fax numbers
- Only allows for one fax number
- Limited functionality using “freeware” applications, i.e. FAX4CUPS, efax
 - Only text and postscript output
 - No document scheduler to handle retries, fax busy signals, etc.
 - Class 2 Fax Modems

Oracle EBS Confirmation and Management Options

Document Confirmation and Management: In Oracle EBS

- Confirmation
 - For email via workflow mailer and XML Publisher, only email bounce backs when email is sent to an invalid address.
- Management
 - For fax and email, you are 100% reliant on the 3rd party product you choose to deliver your POs for their acknowledgement and management capabilities.

AventX from STR Software

AventX: Fundamentals of Document Delivery

- Document Submission
- Document Transmission
- Document Acknowledgement

- AventX Oracle Connector (AOC)
- AventX Toolkit for Oracle (ATKO)

AventX Oracle Connector (AOC)

- Any version from 10.7 through R12.1
- Any output from Oracle Reports and XML Publisher
- Looks like it was written by Oracle themselves
- Document Submission
 - Interactive Delivery
 - Automatic Delivery
 - Application Program Interface (API)

AOC Submission: Interactive Delivery

- Deliver ANY document to ANY destination using Submit Request

Submit Request

Run this Request...

Name: **Printed Purchase Order Report(Portrait)**

Parameters: **All..1169.1171.....Yes..2.No..Yes.No**

Language: **American English**

At these Times...

Run the Job: **As Soon as Possible**

Upon Completion...

Save all Output Files

Notify: _____

Print to: _____

Options...

Help (H) Submit Cancel

AOC Submission: Interactive Delivery

- Common submission interface for ANY Oracle report

Subject:

Options

Terms and Conditions

Hold

XML Archive Connection

Recipients Acknowledgements Cover Page

Pick list from

Delivery Address	Name	Company
<input type="text" value="joe.smith@bigcorp.com"/>	<input type="text" value="Joe Smith"/>	<input type="text" value="Big Corporation"/>
<input type="text" value="804-897-1638"/>	<input type="text" value="Tina Soles"/>	<input type="text" value="STR Software"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

AOC Submission: Interactive Delivery

AventX(tm) Interactive Delivery

Subject:

Options

- Terms and Conditions
- Hold
- XML Archive Connection

Recipients Acknowledgements Cover Page

Email	Name
<input type="text" value="pstock@vision.com"/>	<input type="text" value="Pat Stock"/>
<input type="text" value="jbond@vision.com"/>	<input type="text" value="Jim Bond"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

AOC Submission: Interactive Delivery

AventX(tm) Interactive Delivery

Subject:

Options

- Terms and Conditions
- Hold
- XML Archive Connection

Recipients Acknowledgements **Cover Page**

Name:

Remarks:

AOC Submission: Automatic Delivery

Automatic | Batch

Submit Request

Run this Request...

Name: **Printed Purchase Order Report(Portrait)**

Parameters: All..800.1000.....Yes..2.No..Yes.No

Language: **American English**

Copy...

Language Settings... Debug Options

At these Times...

Run the Job: **As Soon as Possible**

Schedule...

Upon Completion...

Save all Output Files

Layout:

Notify:

Print to: **AventX Automatic**

Options...

Help (C) Submit Cancel

AOC Submission: API

- Application Program Interface provides ability to submit documents from any location in Oracle EBS (such as workflow, forms, packages, etc.)
- Only requires knowledge of PL/SQL
- Fully documented reference guide with code examples

AOC Transmission: Attachments

Purchase Orders (Vision Operations) - 4570

PO, Rev **4570** **0** Type **Standard Purchase Order** Created **18-OCT-2006 13:33:13**

Supplier **Office Supplies, Inc.** Site **OFFICESUPPLIES** Contact **Olden, Maxwell**

Ship-To **V1- New York City** Bill-To **V1- New York City** Currency **USD**

Buyer **Soles, Tina** Status **Incomplete** Total **0.00** []

Attachments - 4570, []

Seq	Category	Description	Data Type	May Be Changed
10	To Supplier	Shipping Instructions	File	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Entity Name: PO Header

Open Document...

Include Related Documents

Document Catalog... Approve...

AOC Acknowledgement: Native Oracle Forms

The screenshot displays two Oracle Forms windows. The background window is a table titled 'AventX(tm) Delivery Status: Request ID 3017945'. The foreground window is a detailed form for the same request ID.

Fax ID	Delivery Address	Subject	Date	Status	Status Message	Host
ABCB0000	4045559177	Purchase Order #1169	09-MAR-09 08:49 AM	Ready		grimlock
ARC1	ARCHIVE	Purchase Order #1169	09-MAR-09 08:49 AM	Success	Document successfully de	grimlock
ARC2	ARCHIVE					
ARC3	ARCHIVE					
ARC4	ARCHIVE					
BBCB0000	sales@officesupplie					
CBCB0000	sales@officesupplie					
p4-1	PRINTJOB					

AventX(tm) Delivery Status (Request ID: 3017945)

Request ID: Fax ID:

Login: Hostname:

Subject:

Recipient

Delivery Address:

To:

Company:

Transmission

Status:

Status Message:

Transmission Date: Pages: of

Buttons: Refresh Data, Manage Document, Modify Document, OK

AOC Acknowledgement: Confirmation Emails

```
To: Brent Lowe
Cc:
Subject: FAX ARDA0000 Success

Subject          : Purchase Order #897

Fax Id           : ARDA0000
Fax Number       : 897-6357
Pages            : 2
Organization ID  : 204
ERP Tracking Number : 2425675
ERP System       : FNDSM
Document Type    : inv
Document ID      : 897

Server Used      : testnt:1

Status           : *** Transmitted ok to 897-6357 on 02/21/07 at 16:19
```

AOC Acknowledgement: Reporting

The screenshot shows a 'Submit Request' dialog box with the following fields and options:

- Run this Request..** (Section header)
- Name:** AventX Oracle Connector Admin Report
- Parameters:** (Empty text field)
- Language:** American English
- Copy...** (Button)
- Parameters** (Sub-dialog box):
 - Report Type:** Summary (Dropdown menu)
 - Start Date:** (Text field)
 - End Date:** (Text field)
 - Document Type:** (Text field)
 - User Name:** (Text field)
 - Org ID:** (Text field)
 - Request ID:** (Text field)
 - Delivery Address:** (Text field)
 - Show Successful:** Y
 - Show Unsuccessful:** Y
 - Show Format Errors:** Y
 - Show Statistics:** Y
- At these T...** (Section header)
- Run** (Text field)
- Upon Com...** (Section header)
- Help** (Text field)
- Buttons:** OK, Cancel, Clear, Help

AOC: Fundamentals of Document Delivery

- Document Management in Oracle EBS
 - Allows user to resend documents that fail or need to be resent from inside of Oracle EBS

AventX(tm) Delivery Status: Request ID 3017948

Fax ID	Delivery Address	Subject	Date	Status	Status Message	Host
DBC0000	2162833365	Purchase Order #4501	09-MAR-09 09:11 AM	Success	No msg	grimlock
DBC0001	pstock@vision.com	Purchase Order #4501	09-MAR-09 09:02 AM	Ready		grimlock
DBC0002	lbrown@rgtsinc.com	Purchase Order #4501	09-MAR-09 09:02 AM	Ready		grimlock

Refresh Data Manage Documents Modify Document View Details...

AOC: Fundamentals of Document Delivery

The screenshot shows the AVENTX WebManager interface. At the top left is the AVENTX WebManager logo. On the right, system information is displayed:

- Owner: TSOLES
- System: GRIMLOCK-faxst1
- System Status: ● Active
- Queued Documents: 15 (31)
- Successful Documents: 1
- Unsuccessful Documents: 0

Below the system info is a toolbar with various icons for search, edit, and navigation. The main content area displays the following:

Displaying Query: Custom Query
Results 1 to 3 of 3

Fax & Email Transmissions Auto-Refresh:

[Printable Version](#) | [Run statistics on active query](#) | [Modify column selection](#)

<input type="checkbox"/>	Fax ID	Status	Date and Time	Delivery Address	Subject	Pages	Device
<input type="checkbox"/>	✉ DBCB0001	Ready	03/09/2009 09:02 AM	pstock@vision.com	Purchase Order #4501	0 of ?	ANY
<input type="checkbox"/>	✉ DBCB0002	Ready	03/09/2009 09:02 AM	lbrown@rgtsinc.com	Purchase Order #4501	0 of ?	ANY
<input type="checkbox"/>	📄 DBCB0000	Success	03/09/2009 09:11 AM	2162833365	Purchase Order #4501	3 of 3	testwin:1

Last Downloaded: March 9, 2009 10:44:46

Displaying Query: Custom Query
Results 1 to 3 of 3

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AventX Toolkit for Oracle

- What is it?
 - Truly a toolkit that leverages XMLP Delivery Manager
- Who is it aimed at?
 - XMLP consultants and companies that would prefer to 'build their own' solution
- How is it implemented?
 - AventX Software installs in less than 30 minutes
 - Using sample code, you can create a working system in less than a day!

AventX Toolkit for Oracle

- What tools does it provide?
 - CUPS printer to fax and email
 - Simple. Dynamic fax/email info but all confirmations and cover page info is 'hard coded'
 - Custom channel to fax and email
 - Different properties for multiple destinations, cover page, confirmations and acknowledgement
 - Bursting tools
 - Working examples and sample code

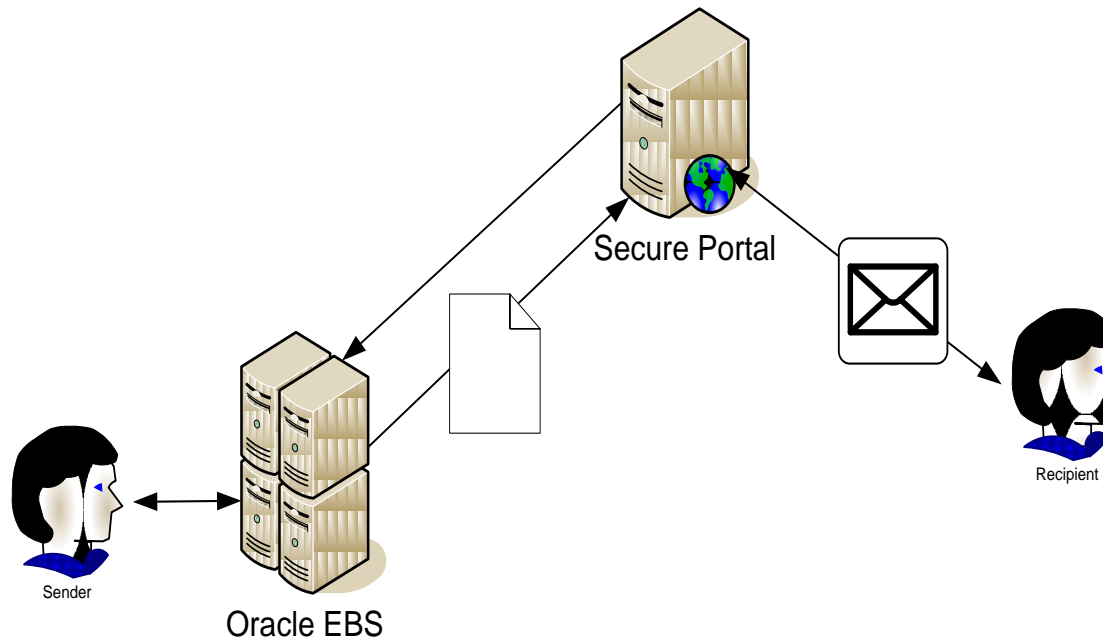
AventX Toolkit for Oracle

- Why use this toolkit?
 - Better Submission
 - Single source – all email and faxes flow through same queue for easy management
 - Deliver ANY document type from PDF, TEXT, PCL, PS, MS office documents and more
 - Better Transmission
 - Choice of delivery mechanisms via premise-based multi-line network fax servers and ASP fax servers
 - Include multiple email attachments and dynamic email message bodies

AventX Toolkit for Oracle

- Better Acknowledgement
 - Multiple email confirmations based on the success or failure of a document
 - Multiple management interfaces for users and administrators to redeliver or correct errant document information
- Better support – NOT freeware
- Simply better and easier to use!

Secure, Confirmed Delivery



Secure, Confirmed Delivery

- User submits document (PO, invoice, etc..) to email recipient as normal through AventX.

AventX(tm) Interactive Delivery

Subject:

Options

- Terms and Conditions
- Hold
- XML Archive Connection

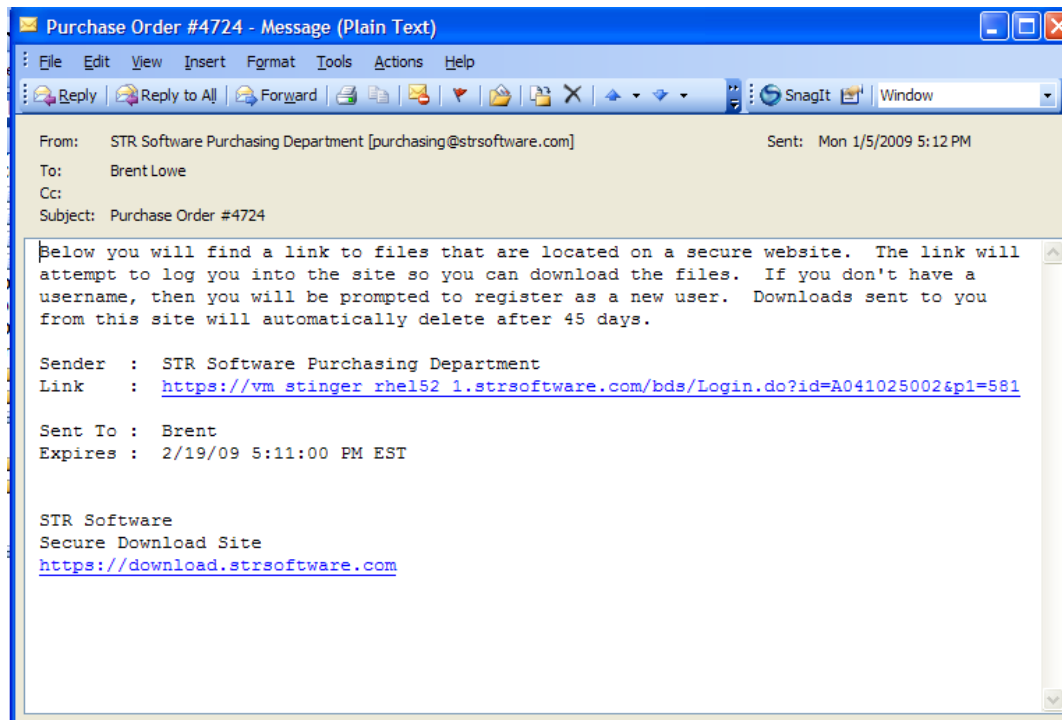
Recipients | Acknowledgements | Cover Page

Pick list from

Delivery Address	Name	Company
<input type="text" value="brent.lowe@strsoftware.com"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

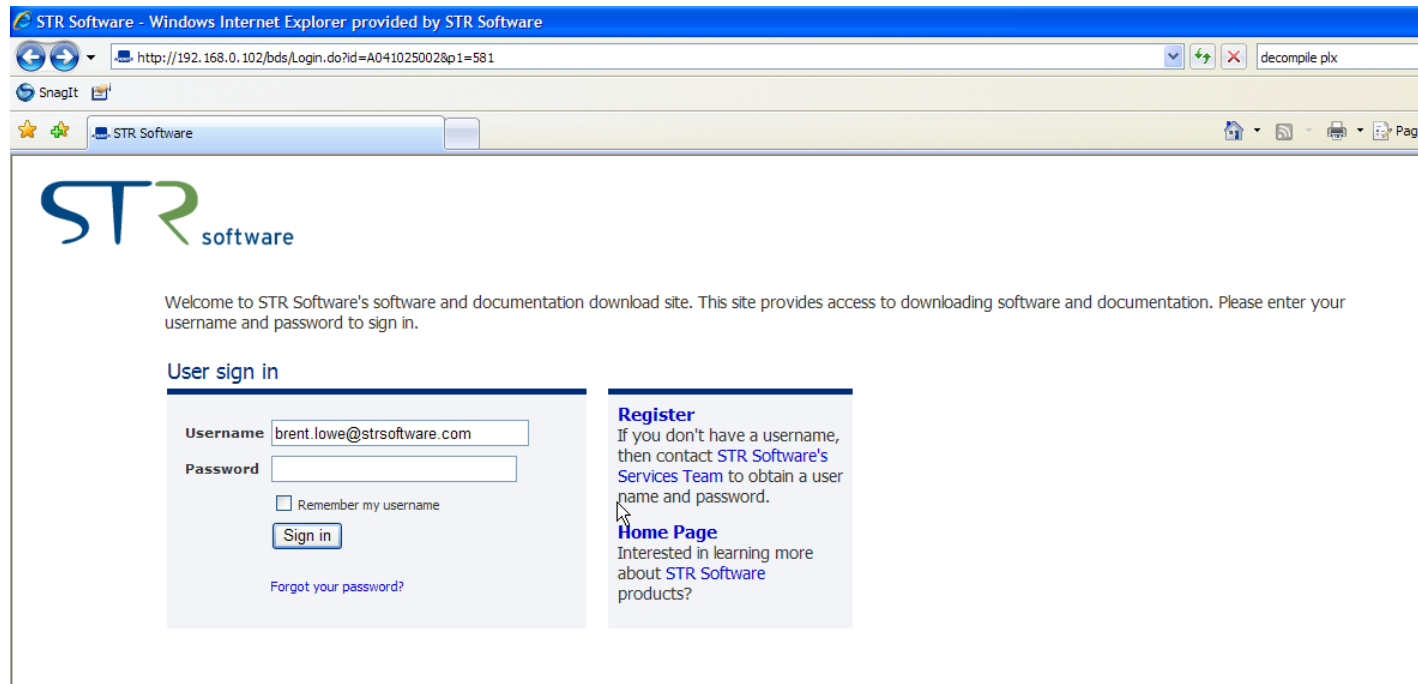
Secure, Confirmed Delivery

- Recipient receives email notice that there is a message waiting for them at a particular web address.



Secure, Confirmed Email

- Recipients clicks on the URL and is directed to a web portal where they sign in to see document.



Secure, Confirmed Email

- Once recipient signed in, user is presented with a screen to view the document.

Your Delivery

[Delete this delivery](#)

Click on the files to download them to your computer

Package name	Purchase Order #4724
To	Brent
Subject	Purchase Order #4724
From	STR Software Purchasing Department





Delivery last updated on 01/05/2009 05:12 PM by STR Software Purchasing Department

Secure message

Here are the files you will need to download. Right click on the files and select "Save Target As" to save the files to your computer.

Notification message

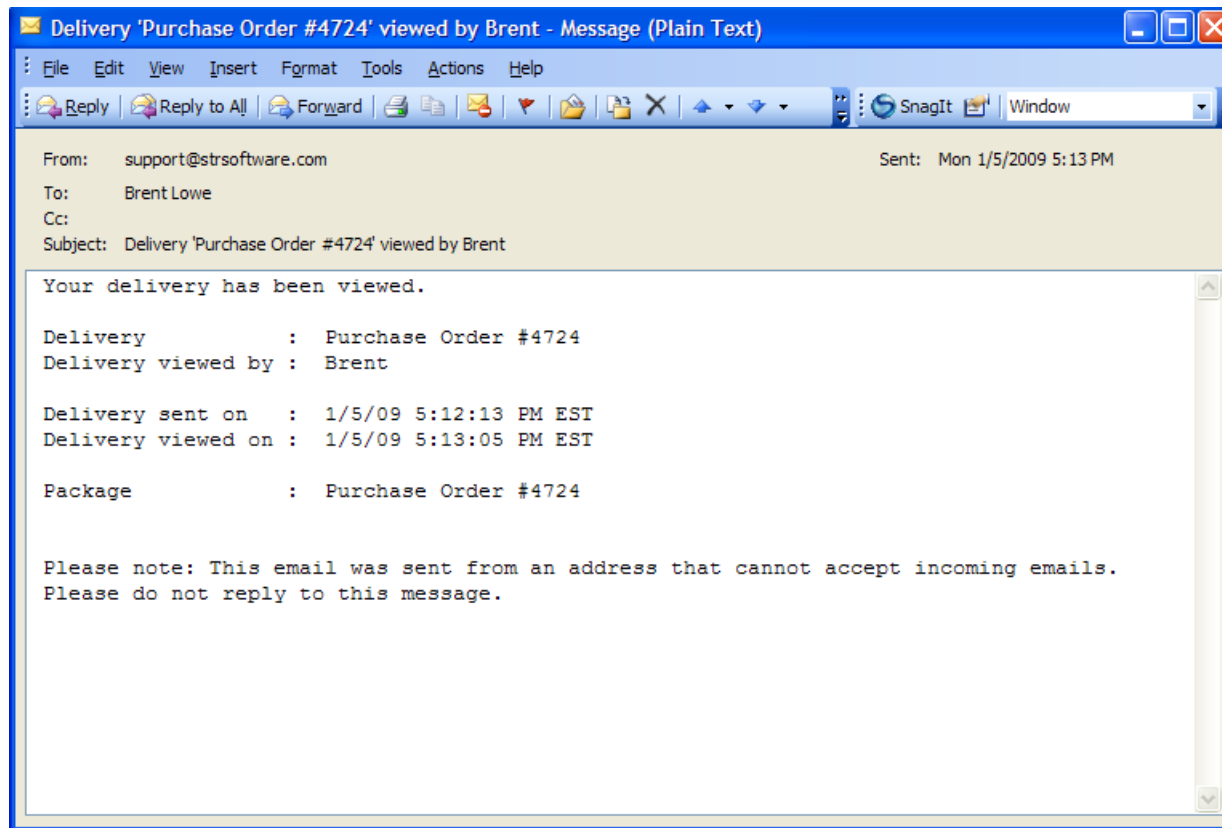
Below you will find a link to files that are located on a secure website. The link will attempt to log you into the site so you can download the files. If you don't have a username, then you will be prompted to register as a new user. Downloads sent to you from this site will automatically delete after 45 days.

File name	Description	Date Created	Size
 Purchase_Order_#4724.pdf		01/05/2009 05:12 PM	113.6 KB
 signed_agreements.doc		01/05/2009 05:12 PM	23.5 KB
 Time_Sheet.xls		01/05/2009 05:12 PM	16.4 MB
 Original_Proposal.pdf		01/05/2009 05:12 PM	95.4 KB

Show/Hide Reply Section

Secure, Confirmed Delivery

- Once viewed, original sender will receive confirmation.

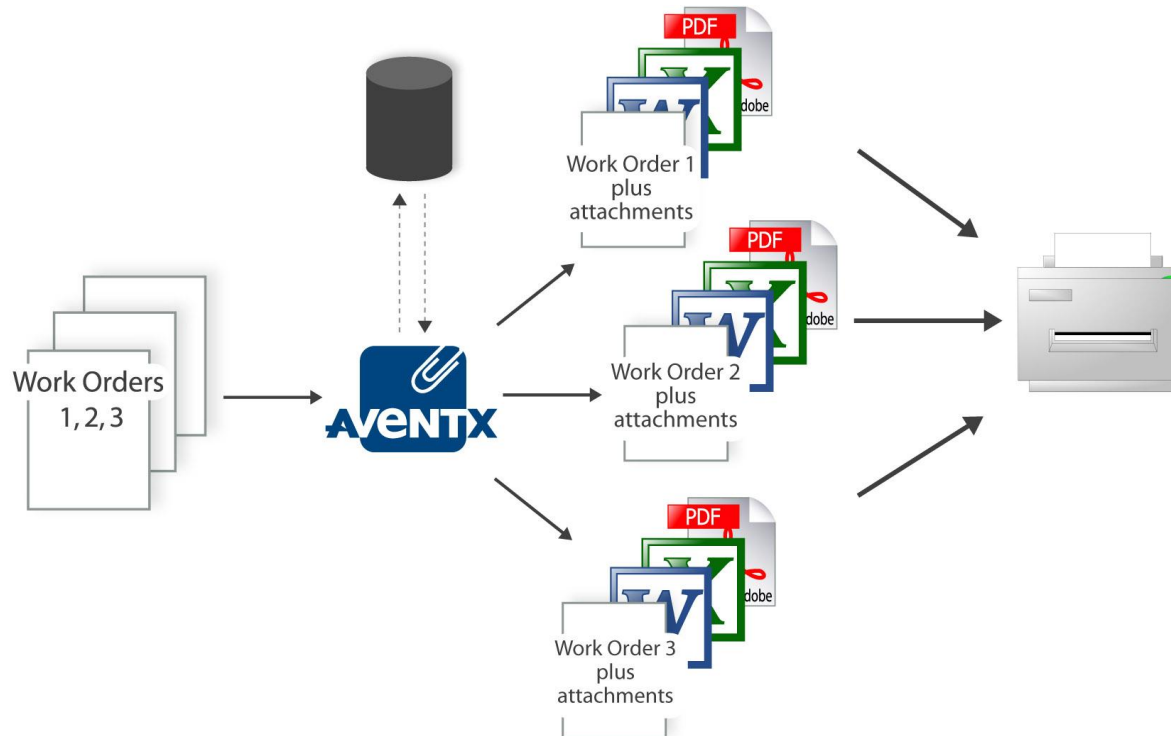


Problem – Printing Oracle Database Attachments

- Significant need to automate printing
- Hours being spent per week printing attachments from invoices, purchase orders, work orders, etc.
- Discouraging use of Oracle to store asset documents

AventX and eAM – Work Orders

- AventX bursts the Oracle report
- AventX collates with the native database attachments



Supported Document Types

- Microsoft Word
- Microsoft Excel
- Microsoft PowerPoint
- HTML
- PDF
- Lotus 123
- Lotus WordPro
- Lotus Freelance
- Corel WordPerfect
- Visio
- TIFF
- RTF
- JPEG, GIF, PNG

Case Study - TM GE Automation

- Company Background
- Product Usage
- Benefits Realized
- Challenges and Issues
- Future Plans

Dennis Collins, A Bit About Me

- 3 ½ years at TM GE Automation Systems
 - User Role: Staff Accountant and Payroll Administrator
 - Support Role: Systems Analyst
- System Administrator for CRM package.
- Professional Interests:
 - Expanding the existing functionality of the system.
 - Integrating all systems to increase efficiency.
 - Automation of manual processes.
 - Mapping business processes to isolate potential growth.

Company Profile

- Joint venture between Toshiba, Mitsubishi, and General Electric operating 5 foreign branch offices.
- Industrial System Drives Business. Steel Mill, Paper Mill, Port Cranes, Utilities, and Conveyers. Providing automation through engineering.
- Oracle OnDemand Customer
- Oracle Apps - E-Business Suite
 - Implemented all Financials, Projects, Purchasing, HR, Benefits, OTL, Internet Expenses, Order Management, Inventory
- Development, Test, and Production Environments
- IT Staff of 9
 - Director of IT, 4 System Analysts, 2 Infrastructure, 2 Internet Application Developers
- 2 distinct groups of licensed users
 - 45 Professional Users (Core Apps)
 - 300 + Business Users (Time Cards, Expense Reports, HR Self-Service)

Our Former Process

- Business Requirements dictated that all POs are to be faxed and all Invoices and Statements be mailed to customers.
- Fax Transmission documents were attached to the front of all POs and filed in project folders.
- Requisition Engineers and Project Managers created a note to supplier to advise buyer to print and manually fax attachments with documents.



Search For An Automated Solution

- Discovery of STR Software's AventX solution at Collaborate 07.
- Registered for free webinar after receiving followup email from inquiries at Collaborate 08.
 - Organized champions to attend the webinar.
- Requested funding for the Q1 08 IT budget for an automated solution.
- Researched other solutions.
- Conducted benefit analysis.
 - Survey of man hours spent printing, faxing, and mailing documents
 - Number of sheets faxed
- Negotiated contract with STR Software and EasyLink.
- Signed contract April 08



ROI Calculation

- Identified primary users that fax/email/mail business documents.
- Polled the group for average number of weekly hours spent distributing documents. Also, the average number of pages (including cover and T&Cs).
- Calculated the average salary of the group (including company benefits).

$$\begin{array}{r} \text{Average Weekly Hours} \\ \times \text{ Average Weekly Salary} \\ \hline \end{array}$$

$$\begin{array}{r} \text{Average Weekly Cost Savings} \\ \times \text{ Weeks Per Year} \\ \hline \end{array}$$

Estimated Annual Savings

Other variables considered but not calculated:

- Cost of paper and printer toner.
- Cost for transmitting the faxes.
- Cost of postage.

Requirements

- Documents faxed directly out of Oracle.
 - Seamless integration with EBS so users do not have to launch an independent program.
- Specified attachments could be faxed along with corresponding document.
- Increase efficiency of the process by reducing the time users spend printing, manually faxing, and filing the documents.
- Reduce the cost.
 - Salary expense for man hours spent on manual process.
 - Internal faxing per page vs. Outsourcing delivery via Easylink.
 - Cost of Paper/Toner for fax machines.
- Previously implemented in the OnDemand environment.
- Compatible with our newly implemented XML document formats.

Implementation

- Installed and Configured AventX solution in Development Instance.
- Rolled the configuration into Production Instance.
- Limited rollout to a power user.
- Scrub Oracle supplier list and updated delivery method.

Issues

- Implementing in an OnDemand Environment
 - Creating Unix User
 - Permissions
 - Apps and System passwords for database
 - Opening Ports on firewall for Easylink and Web Manager

Successes

- Within hours, AventX was installed and configured and ready to test.
- Configured specifically for our business processes.
 - Custom select statement to pull Invoice recipients.
 - Custom cover pages
- New attachment category to automatically send specified attachments.

Take Aways

- Start simple. Once you begin using the solution, you will immediately find 10 other ways to use the solution to meet other business needs.
- Add a message on your coversheets to encourage customers and suppliers to receive their documents via email.

(Example: If you are interested in receiving future POs via Email, please send your requests to sourcing@tmeic-ge.com)

- It's free!! No faxing costs!!
- Do your homework on who should be recipients.
- Evaluate your customer/supplier data in Oracle.
 - Make sure it is updated and in the correct format.

Future Plans

- Add more custom select statements
 - Project Coordinators are automatically added as recipient
- Add custom coversheets that will use tokens specific to each user/buyer for more personalized look and feel.
- Create an indicator on the contact to indicate they are a secondary recipient.

Notification Preferences

Supplier Sites (GTAU America OP) - STR Software Company, 1001279

Site Name: **11505 ALLECINGI** Alternate Name:

Country: **United States**

Address: **11505 Allecingie Parkway** Alternate Address:

City: **Richmond** State: **VA** Postal Code: **23235**

Province: County:

Language: Inactive On:

General | Contacts | Accounting | Control | Payment | Bank Accounts | EDI | Invoice Tax | Withholding Tax

Site Uses

Pay Purchasing

Primary Pay RFQ Only

Procurement Card

Customer Number:

Shipping Network Location:

Supplier Notification Method: **Fax**

Communication

	Area Code	Number	Telex	E-mail
Voice	804	8971600	<input type="text"/>	<input type="text"/>
Fax	804	8971638	<input type="text"/>	<input type="text"/>

Customer Number:

Shipping Network:

Supplier Notification Method: **Printed Document** (dropdown menu open showing Fax, E-mail)

Telex:

E-mail:

- Notification Method is set for each individual site

Notification Preferences

Customer Addresses - TM GE AUTOMATION SYSTEMS LLC., 3695D

Country: **India** Site Number: **13875**

Address: **INDIA BRANCH** **UNIT NO. #03-04, THIRD FLOOR**
BLOCK 7, CYBER PEARL

Alternate Name: City: **HITEC CITY** State:
Postal Code: **500-081** Province: **MADHAPUR** County:
EDI Location: Identifying Address: Active:

Addresssee:
Business Purposes Characteristics Communication **Contacts** Contacts : Roles Bank Accounts

— Contact Name —

Last	First	Title	Number	Job	Mail Stop	Reference	Active
ACCOUNTS PAYABL			15659			16390	<input checked="" type="checkbox"/>
							<input type="checkbox"/>
							<input type="checkbox"/>

— Roles —

Description	Primary	[]
Bill To	<input type="checkbox"/>	[]
	<input type="checkbox"/>	[]
	<input type="checkbox"/>	[]

Contact Role Information

Transmission Type:

Transmission Type

Transmission Type	Description
ALL	All
E	Email
EP	Email&Print
F	Fax
FE	Fax&Email
FP	Fax&Print
P	Print

Find %

Eind OK Cancel

- Transmission Type is set as a flex field value for the Customer Contacts : Roles

Sample: Select for Custom Invoice

```

SELECT substr(substr(ch.customer_name,1,50),1,40) company, substr(substr(rc.last_name,1,30),1,40) last_name, substr(substr(rc.first_name,1,20),1,40) first_name, substr(substr(rcr.attribute1,1,3),1,25)
      delivery_type, substr(decode(rp.extension,',hp.PRIMARY_PHONE_COUNTRY_CODE || ' ' || rp.area_code|| ' ||rp.phone_number,hp.PRIMARY_PHONE_COUNTRY_CODE || ' ' || rp.area_code||
      '||rp.phone_number || ' ||rp.extension),1,255) fax_address, substr(substr(rc.email_address,1,45),1,255) email_address, substr('',1,2000) ranking, substr('',1,512) other FROM apps.ar_customers ch

,apps.ra_site_uses_all cs
,apps.ra_addresses_all ca
,apps.ra_contacts rc
,apps.ra_phones rp
,apps.hz_parties hp
,apps.ra_customer_trx_all rcta
,apps.ra_contact_roles rcr
WHERE rcta.trx_number = :UID1
and rcta.org_id      = :ORGID
and rcta.bill_to_customer_id = ch.customer_id
and ch.customer_id  = ca.customer_id
and ch.status       = 'A'
and ca.status       = 'A'
and ca.bill_to_flag is not null
and cs.status       = 'A'
and cs.site_use_code = 'BILL_TO'
and cs.address_id   = ca.address_id
and cs.site_use_id  = rcta.bill_to_site_use_id
and cs.org_id in (106,215,216,217,254,256,354)
and rc.status       = 'A'
and ch.customer_id  = rc.customer_id
and rp.contact_id   = rc.contact_id(+)
and rc.contact_id   = rcr.contact_id(+)
and rcr.usage_code = 'INV'
and rp.address_id   = ca.address_id(+)
and rp.customer_id  = ch.customer_id(+)
and rp.status       = 'A'
and rp.phone_type   = 'FAX'
and rp.owner_table_id = hp.party_id ORDER BY substr(ca.city,1,25)

```

How we use AventX

PO Process Example

- A single request is submit to transmit the PO (print, fax, email). Before AventX solution was implemented, this was the same process used to generate the PDF and print it before manually faxing.

Parameters

Print Selection	All	
Purchase Order Numbers From	213030955	
To	213030955	...
Release Numbers From		
To		
Release Dates From		
To		
Approved		
Test		
Print Releases Option	Yes	
Sort By		
Print PO in Room?	PORM161	Print PO Room 161
Fax Enable	No	No
Fax Number		
Print Only Changed Lines	Yes	
Print Canceled Lines	Yes	
Print Releases Only	No	
Print Shipping Instructions?	Y	Print Shipping Instructions
Dynamic Precision Option	2	-9,999,990.00



PO Process Example Continued

- The AventX Style and Printer can be set as defaults for the concurrent request.

Upon Completion...

Save all Output Files

Layout:

Template Name	Template Language	Format	For Language
CustomPrintPOPPortrait	English	PDF	AMERICAN

Preview

Notify the following people:

Name	For Language

Print the Output To:

Style: **AVENTX PO PORTRAIT**

Printer	AventX	For Language
AventX Interactive	0	All languages

Help OK Cancel

PO Process Example Continued

- According to the document setup, the recipient is selected.
- In the Options section, the user can choose to not send a copy of the Terms and Conditions

AventX(tm) Interactive Delivery

Subject: **TMGE PO #213030955**

Options

Terms and Conditions

Hold

XML Archive Connection

Recipients Acknowledgements Cover Page

Pick list from
Employees

Delivery Address	Name	Company
1-540-563-4995		GEXPRO

Cancel Submit

PO Process Example Continued

- If you want to add other recipients, they can be added on the fly using the Interactive Delivery Method.

AventX(tm) Interactive Delivery

Subject:

Options

Terms and Conditions

Hold

XML Archive Connection

Recipients Acknowledgements Cover Page

Pick list from

Delivery Address	Name	Company
<input type="text" value="1-540-563-4995"/>	<input type="text"/>	<input type="text" value="GEXPRO"/>
<input type="text" value="dennis.collins@tmeic-ge.co..."/>	<input type="text" value="Dennis Collins"/>	<input type="text" value="TM GE Automation Systems"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

PO Process Example Continued

- According to document setup, the person receiving Acknowledgement of the delivery is selected.
- You can also add additional people to receive the Acknowledgement

AventX(tm) Interactive Delivery

Subject:

Options

Terms and Conditions

Hold

XML Archive Connection

Recipients Acknowledgements Cover Page

Email	Name
<input type="text" value="JEAN.CHANEY@TMEIC-GE.COM"/>	<input type="text" value="JEAN CHANEY"/>
<input type="text" value="dennis.collins@tmeic-ge.com"/>	<input type="text" value="Dennis Collins"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

PO Process Example Continued

- The default coversheet is selected according to setups. If others have been created, the user can choose a different cover.
- Any text added to the Remarks section will print on the coversheet

Aventura Interactive Delivery

Subject: **TMGE PO #213030955**

Options

- Terms and Conditions
- Hold
- XML Archive Connection

Recipients | Acknowledgements | **Cover Page**

Name: **TM GE Fax Cover**

Remarks: **You can add a message to this area and it will print on the cover page.**

Example:

John,
There is a copy of PO 213030955 you requested.

Cancel Submit

PO Process Example Continued

Inbox - Microsoft Outlook

File Edit View Go Tools Actions Help

outlook:Inbox

Messages

Associate View in Salesforce

Mail

Favorite Folders

- Inbox (24)
- Unread Mail
- For Follow Up
- Sent Items

All Mail Folders

- 1 crm
 - quotes
 - Salesforce
 - Astadia
 - bluewolf
 - castiron
 - Implementation
 - Support
 - Training
 - seibel
 - valuation
 - 2 STR
 - Address Updates
 - DEMO
 - Easylink
 - Implementation
 - Quotes
 - ats
 - Deleted Items

Inbox

From	Subject	Received	Size
STR FAXING SOFTWARE SOLUTION Account	TMGE PO #213030955 Sent To dennis.collins@tmeic-ge.com --> Success	Thu 10/2/2008 1:33 AM	2 KB
JEAN CHANEY	TMGE PO #213030955	Thu 10/2/2008 1:33 AM	93 KB
Date: Yesterday			
Salesforce.com Alerts	REMINDER: ALL INSTANCE Salesforce.com Scheduled Maintenance for 10/4/2...	Wed 10/1/2008 6:35 PM	2 KB
Carla Emon	Final US Mgmt Detail Report for Sep 08	Wed 10/1/2008 5:42 PM	130 KB
ITtoolbox Blogs	ITtoolbox: New blog post by hsylves	Wed 10/1/2008 5:24 PM	19 KB
Dennis Collins	review	Wed 10/1/2008 4:49 PM	7 KB
Curtis Woods	Italy Preliminary Management Report	Wed 10/1/2008 4:38 PM	5 KB

TMGE PO #213030955
JEAN CHANEY [JEAN.CHANEY@TMEIC-GE.COM]
To: dennis.collins@TMEIC-GE.COM
Attachments: TMGE_PO_#213030955.pdf (21 KB); TMGE_PO_TC.pdf (51 KB)

This e-mail message has been automatically delivered to you by TM GE AUTOMATION SYSTEMS.

Send acknowledgements or order confirmations to fax # 540-283-2394 or e-mail them to JEAN.CHANEY@TMEIC-GE.COM

Also, please fax or e-mail the following information ASAP for the items on new orders:

- 1) Promise Date
- 2) Country of Origin
- 3) Supplier Item # (s)

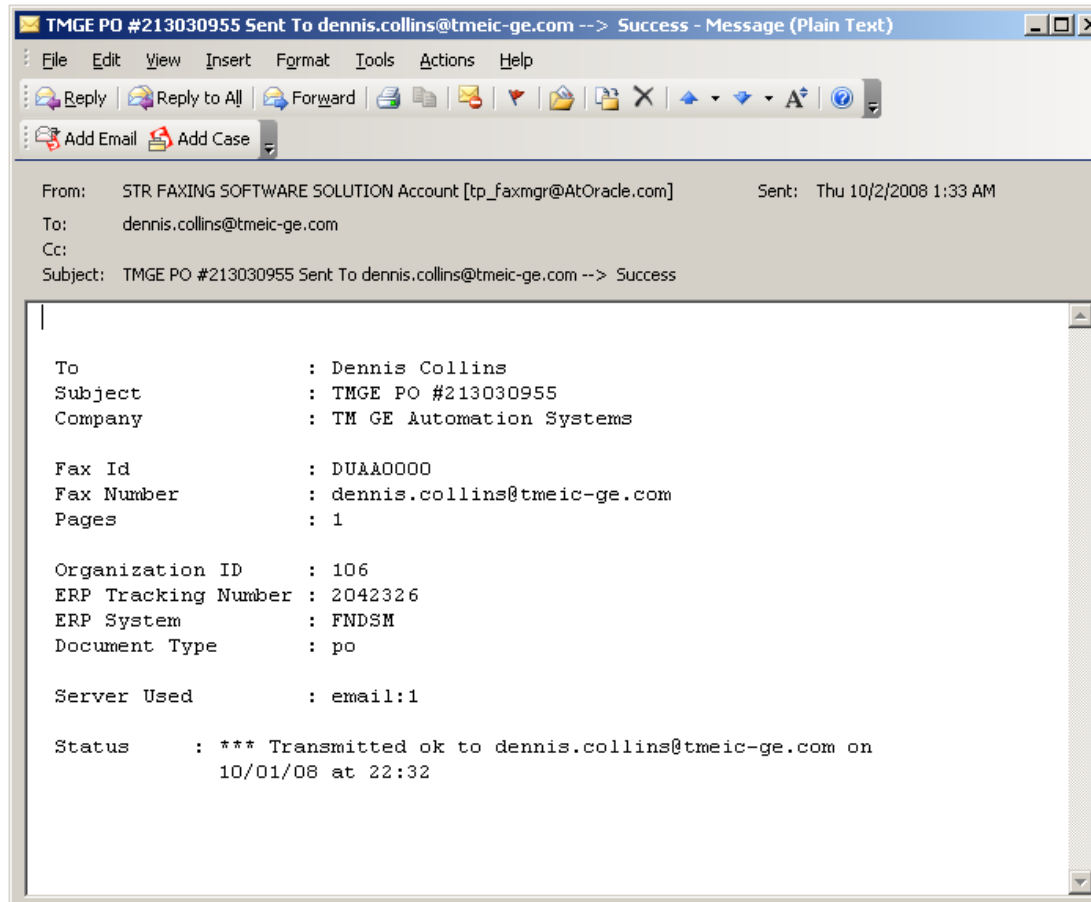
Thank you,

263 Items

Start Setup... Settin... Inbox... STR.d... Micros... ITC_I... RICVO... Docum... Oracle... Oracle... Oracle... 1:35 AM

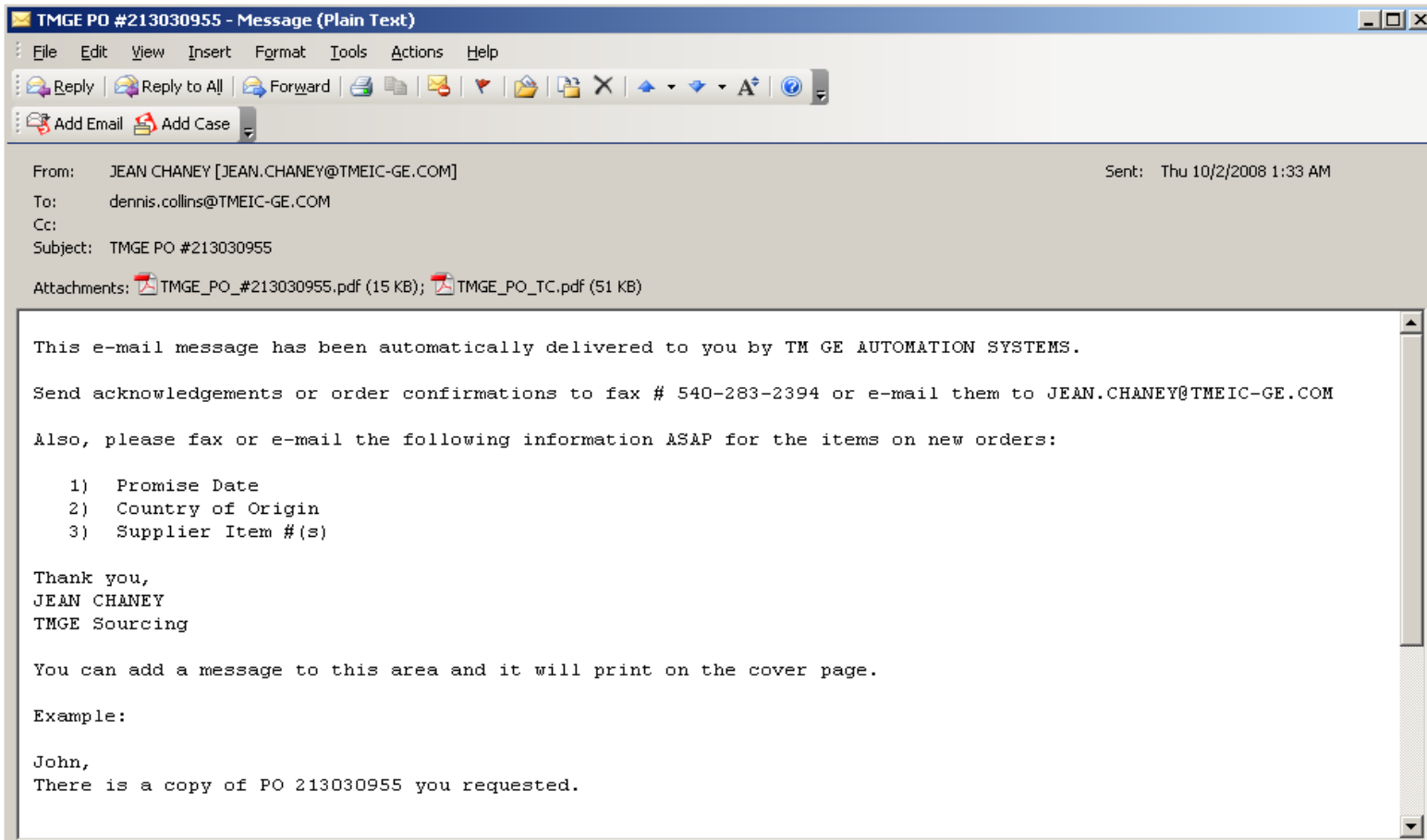
PO Process Example Continued

- Body of the Acknowledgement



PO Process Example Continued

- Body of the email sent to recipients



Summary

- The AventX solution is completely configurable to any business process.
- Each Customer and Supplier Site can be configured individually
 - Different Notification Methods
 - Different Fax Numbers
- Additional recipients can be added to receive the document or acknowledgement on the fly using the Interactive Mode.
- Users are able to Fax/Email/Print from within Oracle Apps using the same concurrent request they use to print and manually fax.
 - Users better utilize their time when they are not standing in front of a fax machine.
 - Users do not have to launch an additional program to fax or email the document.
- AventX will send attachments to accompany their corresponding documents.

Summary

- Native functionality of Oracle EBS for email and fax is limited to single document purchase orders ONLY
- XMLP formatted purchase order output is delivered the same for email, fax and print
- Java delivery manager is a start for document delivery but requires programming talent to complete
- Third-party solution is required for actual “fax delivery”
- Search for a solution that makes it easy for the Oracle user to submit, transmit and confirm delivery of ANY document



Automated Document Delivery

AventX Oracle Connector

any document. any format. any volume.

- Email, fax and print from Oracle EBS, including database attachments
- Support for XML Publisher and Document Formatting Solutions
- Flexible Delivery Methods (1-off & batch)
- Real-time delivery status within Oracle EBS



STR Software (www.strsoftware.com)

	<u>% Rating STR's Performance Excellent or Good</u>
The reliability of AventX	99.4 %
The knowledge of the Technical Support Team	97.8 %
The timeliness of the resolution to your product issue	97.2 %
The overall value of Support services	97.7 %
Your increased efficiency from using AventX	94.7 %
The cost-effectiveness of AventX	94.0 %
Your overall impression of AventX	97.8 %
	<u>% Answering Yes</u>
Would you purchase STR Software's products again?	98.2 %
Would you recommend STR Software to a colleague?	98.8 %

Satisfied Oracle EBS Customers



Q and A

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