# Moving to BI Publisher, Now What?
## Automated Email & Fax Delivery from Oracle EBS

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*VP of Financial Systems, Rogers Communications, Inc.*

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# 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

- ## Rogers Communications
  - Headquartered in Toronto, Ontario Canada
  - A diversified Canadian communications and media company
  - Primary businesses include:
    - Rogers Cable
    - Rogers Media
    - Rogers Wireless
  - [www.rogers.com](http://www.rogers.com)

- ## Larry Michieli
  - VP of Financial Systems
  - 416-935-8650 and [larry.michieli@rci.rogers.com](mailto:larry.michieli@rci.rogers.com)

# Agenda

- Case study from Rogers Communications
- Document Delivery Needs and Requirements
- Building a Document Delivery Solution
- Integrating with and without BI/XML Publisher
- Integrating with Delivery Manager
- Integrating with AventX
- 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

# PO Submission: PO Approval Form

# PO Submission: Supplier Sites

# PO Submission: PO Communicate

# PO Submission: PO Communicate

# PO Submission: Submit Request

# PO Submission: Submit Request

**"Fax Enable" Features**

- Limited to Only Purchase Orders
- No Email
- Fax Fields Not Pre-Populated
- Only One Purchase Order
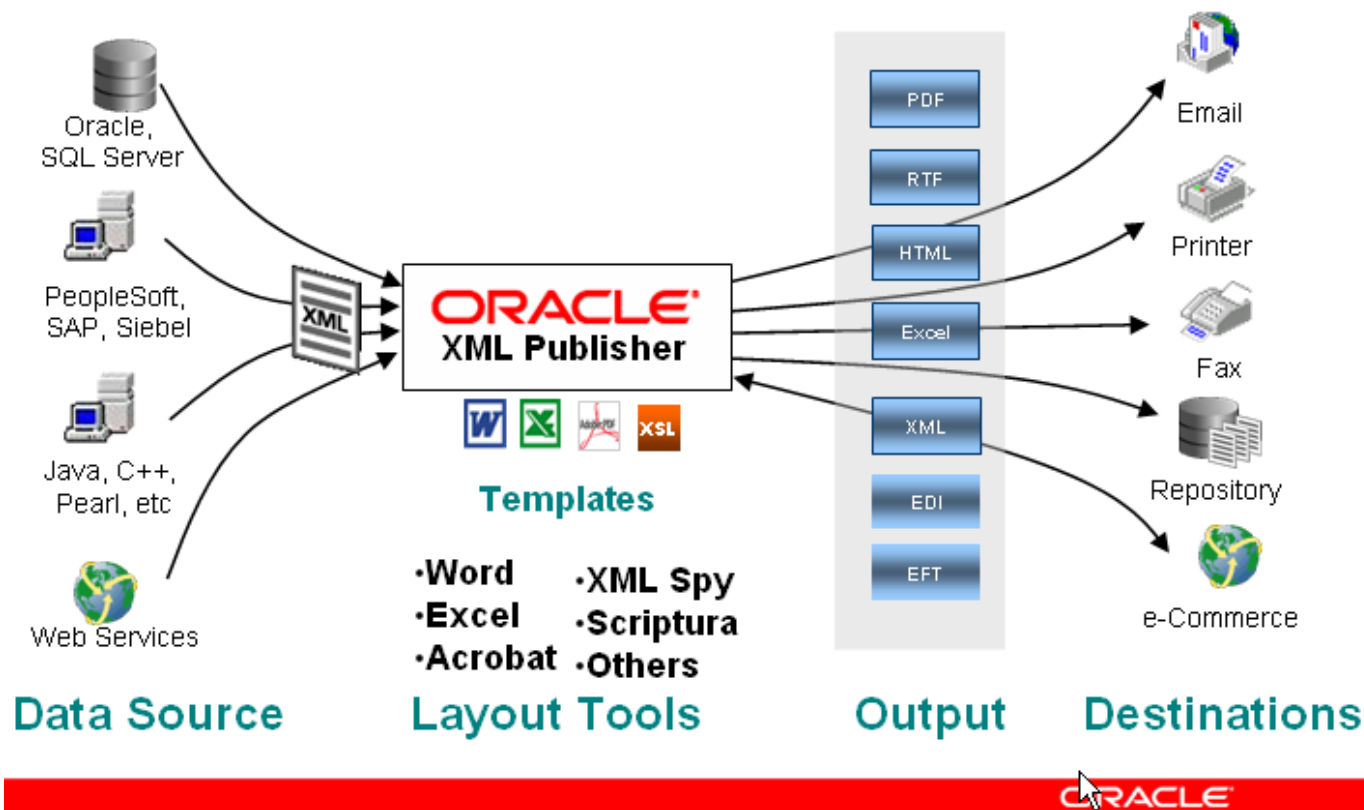
# Oracle EBS
# Document Formatting and Delivery
# with
# XML Publisher

# Document Delivery with XML Publisher



From Data to Destination

# PO Transmission: Email – Without XML Publisher



- 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



- PDF Attachment

- Fax and Email Look the Same

# PO Transmission: Fax – With XML Publisher

```
{{BEGIN}}
{{FAX 804-897-1638}}
{{A
{{E
```



→ Separate fax command file

→ Separate PDF data file

- Requires 3rd party fax solution to process command file

The PO document preview shows:

| 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. | Order Date | Revision Date | Buyer |
|---|---|---|---|
| 1009 | 06-OCT-2006 | | Green, Terry |
| Payment Terms | Ship Via | FOB | |
| 30 Net (terms date + 30) | UPS | Origin | |

| Line | Part Number / Description | Quantity | UOM | Unit Price | Tax | Amount |
|---|---|---|---|---|---|---|
| 1 | BUSCARDS<br>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) 897-1600 extension 2

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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



Add Bursting Control
File to Data Definition

# XML Publisher Bursting and Delivery: Setup

- Bursting Control File – Email Delivery

```xml
<?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>
```
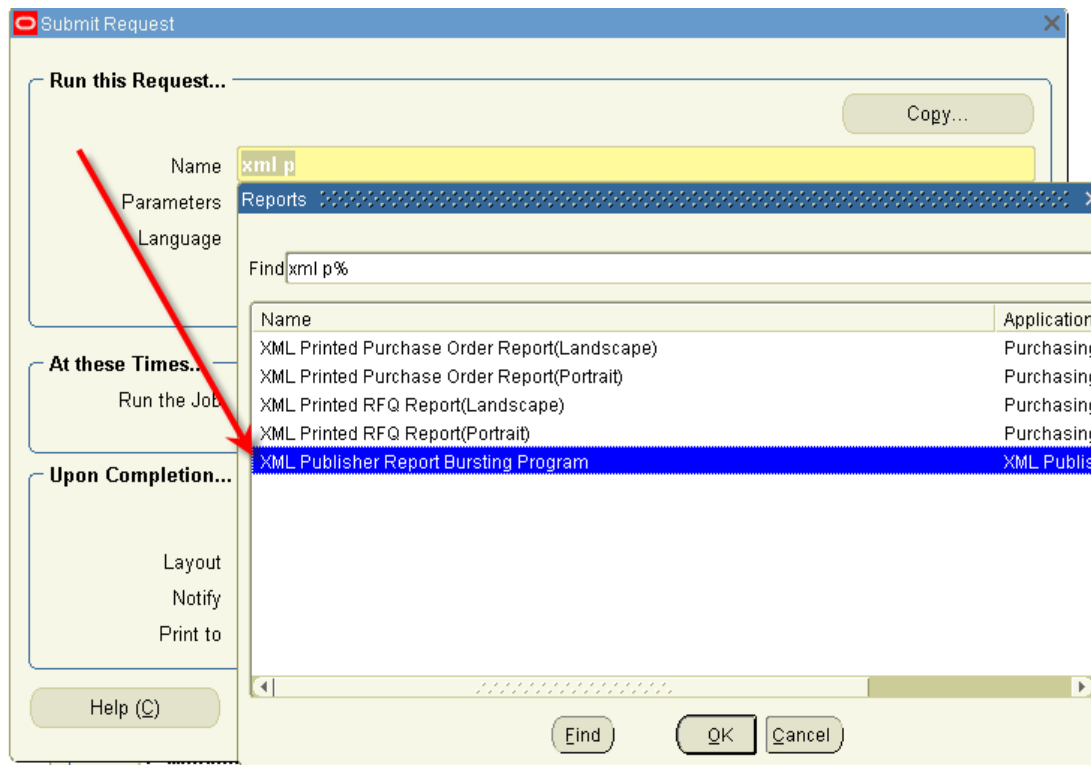
# XML Publisher Bursting and Delivery: Setup

- **Bursting Control File – Fax Delivery**

```xml
<?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/axtkocupsprinter">
        <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>
```

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# XML Publisher Bursting and Delivery: Usage

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

# XML Publisher Bursting and Delivery: Usage

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

# XML Publisher Bursting and Delivery: Results

- Email:
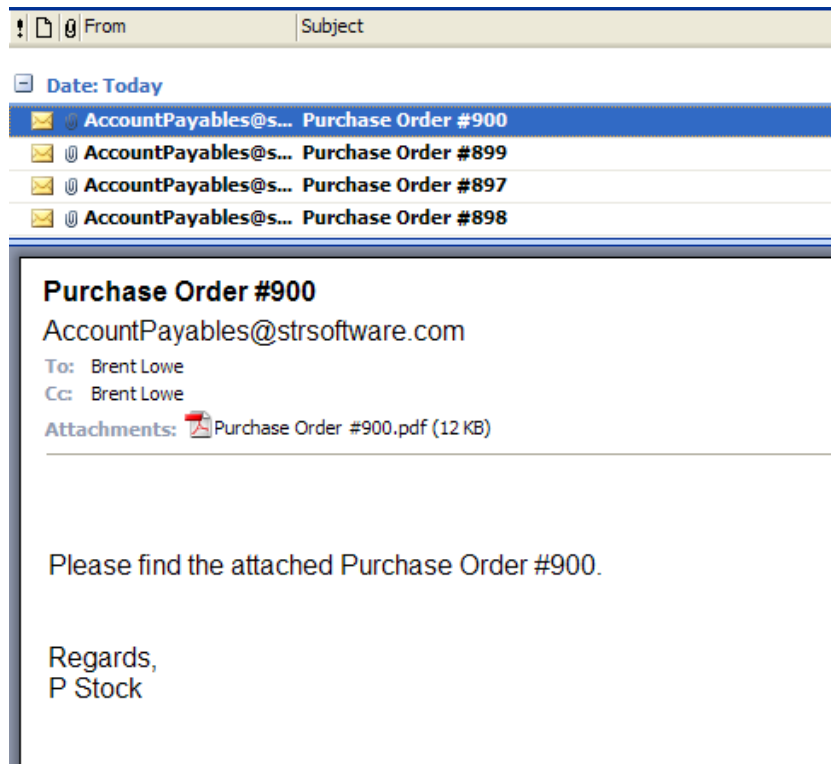
# XML Publisher Bursting and Delivery: Results

- 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…

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# 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
- 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

# AOC Submission: Interactive Delivery

- Common submission interface for ANY Oracle report

# AOC Submission: Interactive Delivery

# AOC Submission: Interactive Delivery

# AOC Submission: Automatic Delivery

## Automatic | Batch

# 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

# AOC Acknowledgement: Native Oracle Forms

# 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

# 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

# AOC: Fundamentals of Document Delivery

# 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**

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# 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

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# 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!
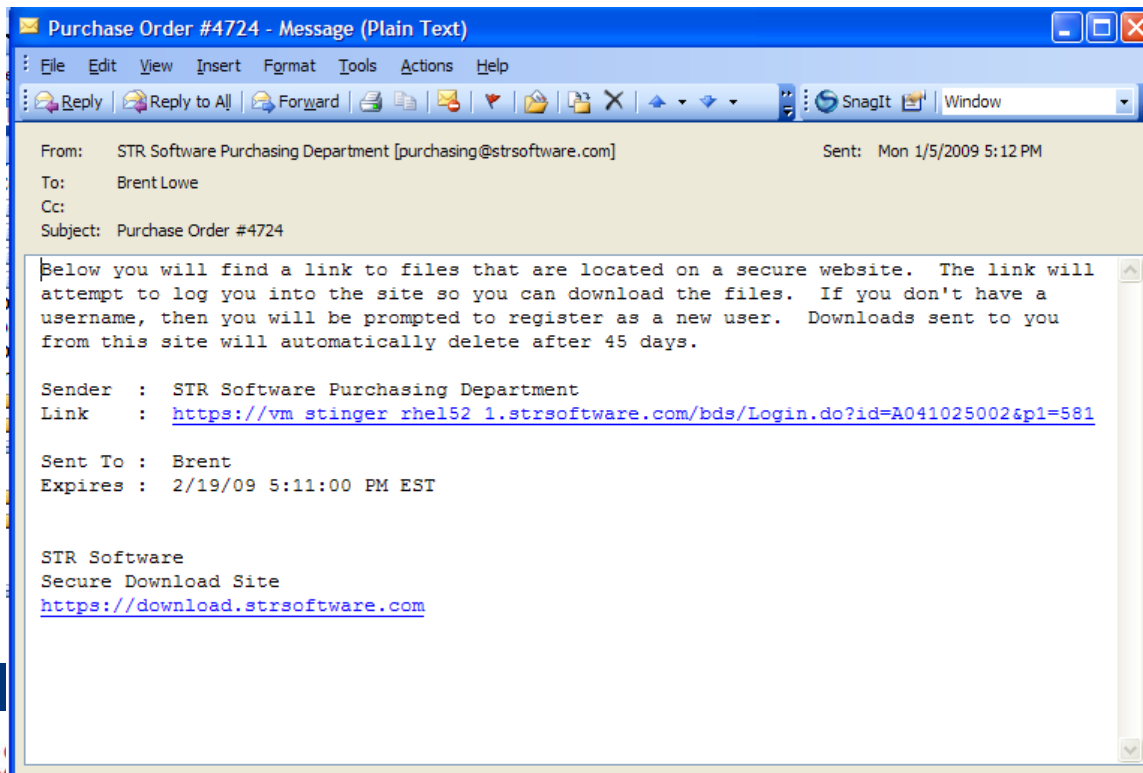
# Secure, Confirmed Delivery



Secure Portal

Oracle EBS

Sender
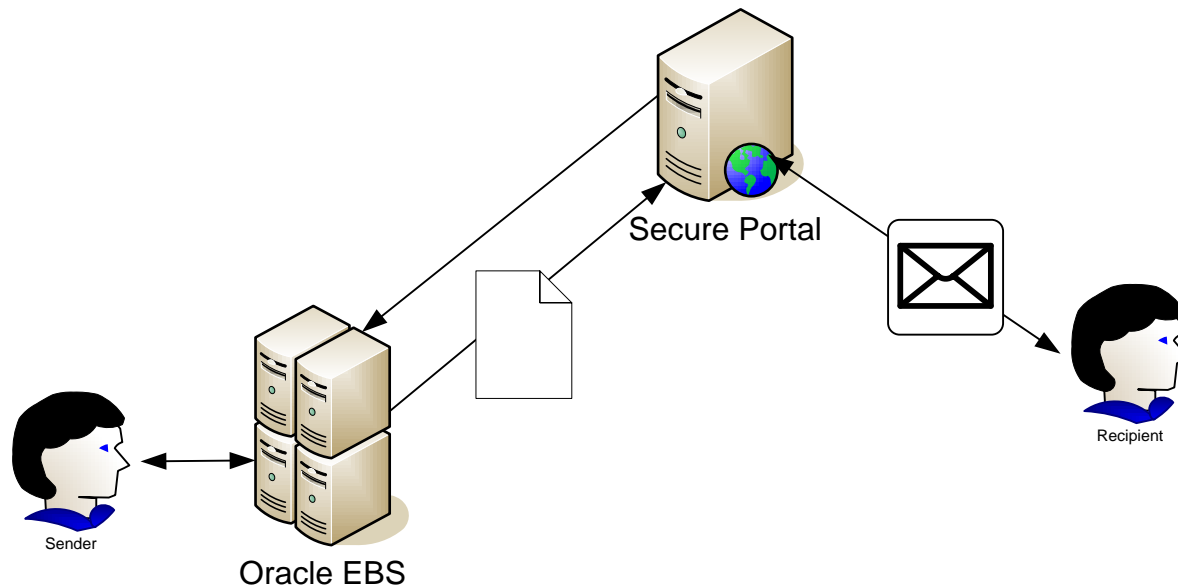
Recipient

# Secure, Confirmed Delivery

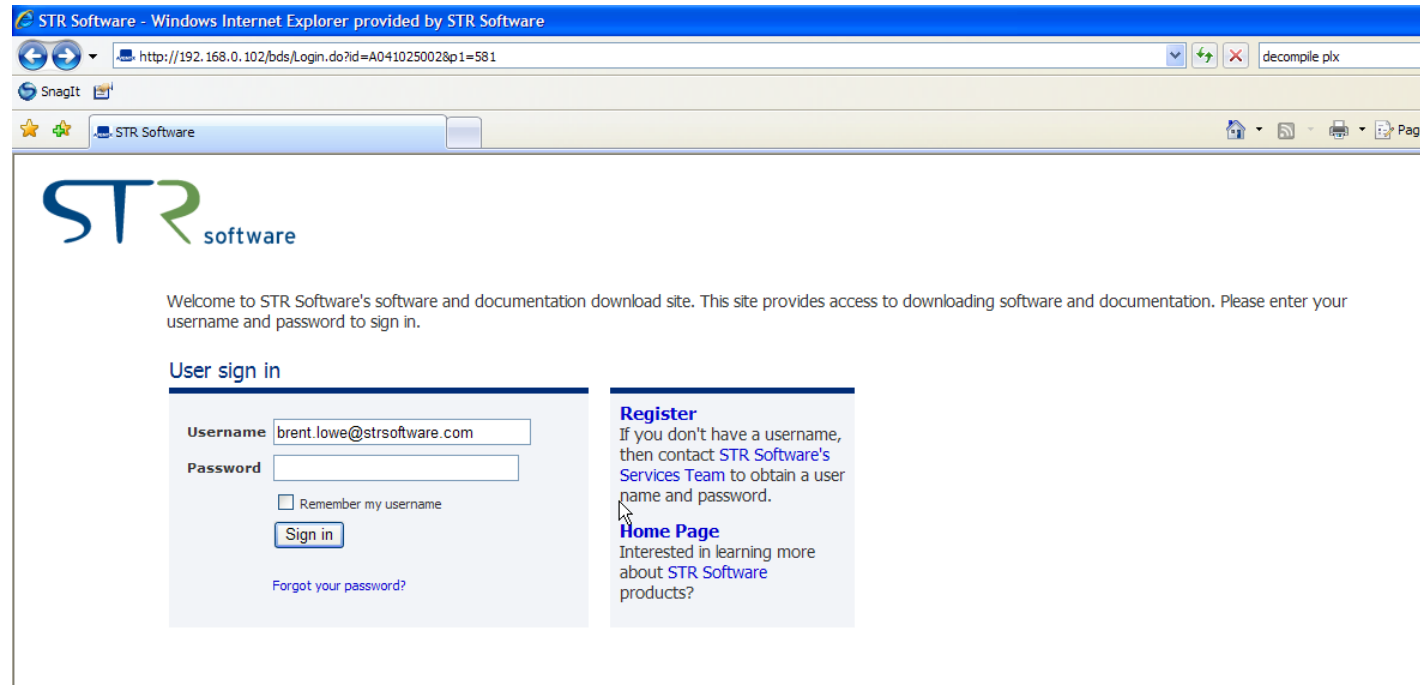- User submits document (PO, invoice, etc..) to email recipient as normal through AventX.

# 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

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# Secure, Confirmed Delivery

- Once viewed, original sender will receive confirmation.
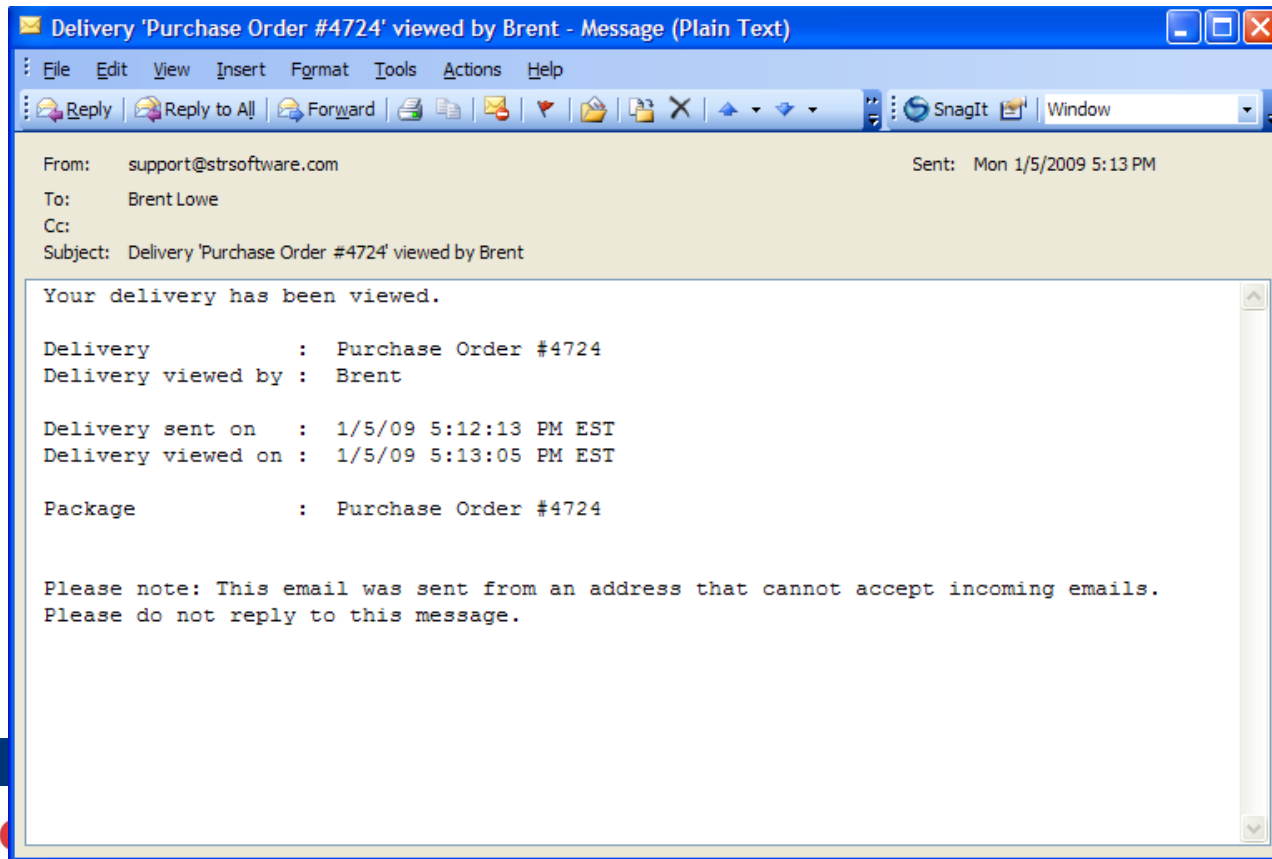
# Problem – Printing Oracle Database Attachments

- 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
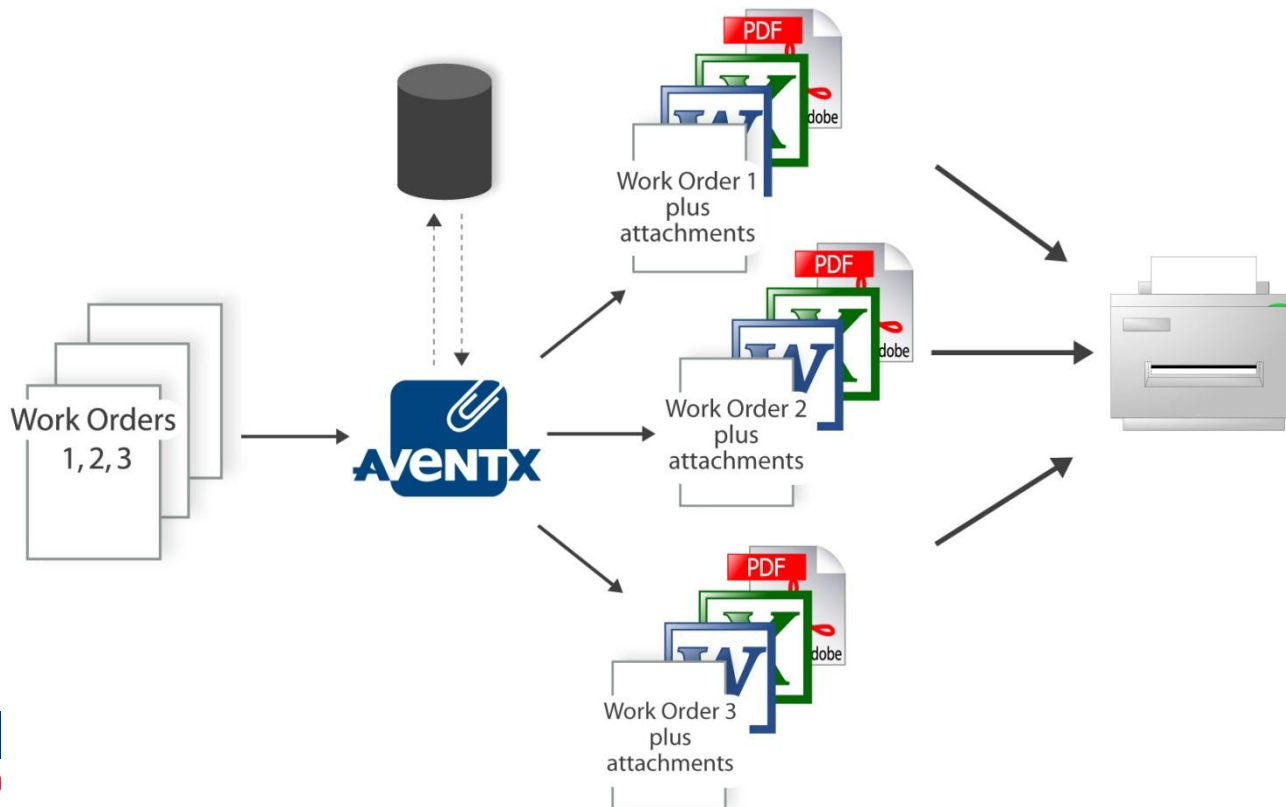
# Supported Document Types

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

# 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

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# Automated Document Delivery

## AventX Oracle Connector

### *any document. any format. any volume.*

- Email, fax and print from Oracle EBS, <u>including database attachments</u>

- Support for XML Publisher and Document Formatting Solutions

- Flexible Delivery Methods (1-off & batch)

- Real-time delivery status <u>within</u> Oracle EBS

# STR Software ([www.strsoftware.com](www.strsoftware.com))

|  | % Rating STR's Performance Excellent or Good |
|---|---|
| The reliability of AventX | 96.0 % |
| The knowledge of the Technical Support Team | 97.0 % |
| The timeliness of the resolution to your product issue | 95.5 % |
| The overall value of Support services | 95.0 % |
| Your increased efficiency from using AventX | 92.4 % |
| The cost-effectiveness of AventX | 92.0 % |
| Your overall impression of AventX | 95.1 % |
|  | **% Answering Yes** |
| **Would you purchase STR Software's products again?** | **97.5 %** |
| **Would you recommend STR Software to a colleague?** | **97.5 %** |

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# Satisfied Oracle EBS Customers

# Q and A

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