



## **DOCUMENTS to PROCESSIT Connector**

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# Product Description

July 2015 – ReadSoft AB

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27072015.1000

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# Overview

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This document describes the *DOCUMENTS to PROCESSIT Connector* for ReadSoft Service Bus.

ReadSoft Service Bus is an integration platform that extends ReadSoft solutions by providing universal capabilities for integrating and customizing document-driven processes. ReadSoft Service Bus (RSB) adds high customer value to ReadSoft solutions and reduces solution implementation times for custom projects. It is service-orientated, expandable, facilitates easy integration and allows component reuse across multiple systems.



RSB uses *connectors* to facilitate communication between systems.

## The **DOCUMENTS to PROCESSIT Connector**

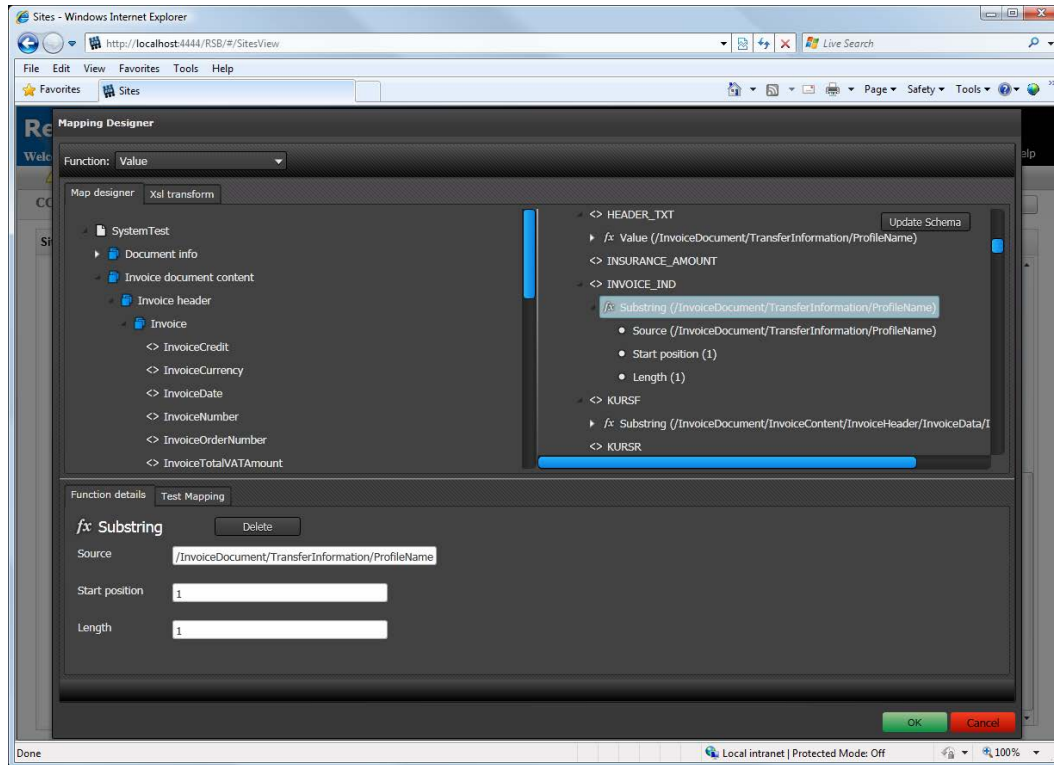
The **DOCUMENTS to PROCESSIT Connector** facilitates communication between ReadSoft **DOCUMENTS** and **PROCESSIT**. Using RSB's administration page and the mapping tool that is provided with the installation, you can easily route document information between **DOCUMENTS** and **PROCESSIT**. The **DOCUMENTS to PROCESSIT Connector** automatically sends invoices to **PROCESSIT** and provides field-validation features in **INVOICES Verify and Transfer**.



## Key concepts and features

The DOCUMENTS to PROCESSIT Connector:

- Automatically sends invoices from DOCUMENTS to PROCESSIT.
- Uses field information from PROCESSIT for validation in INVOICES Verify and Transfer.
- Provides centralized document-tracking and troubleshooting functions.
- Quick and easy setup compared to traditional methods.
- Support for mapping fields between systems using Map Designer.



## Components



The flow of information for the document-routing service.

The DOCUMENTS to PROCESSIT Connector is composed of the following parts:

- **RSB plug-in for DOCUMENTS** - connects ReadSoft DOCUMENTS to the DOCUMENTS adapter.
- **RSB plug-in for INVOICES** - connects ReadSoft INVOICES to the INVOICES adapter.
- **DOCUMENTS adapter** - transforms invoice data to a common format.
- **INVOICES adapter** - transforms invoice data to a common format for use with validation.
- **RSB** - coordinates communication between adapters.

- **PROCESSIT adapter** - sends invoice data and image files to PROCESSIT.

## Supported systems

The following systems are supported:

- ReadSoft DOCUMENTS 7-1 or newer.
- ReadSoft Service Bus 2-2 SP2.
- PROCESSIT 7-1 or newer.

# Installation

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The DOCUMENTS to PROCESSIT Connector installation contains two parts:

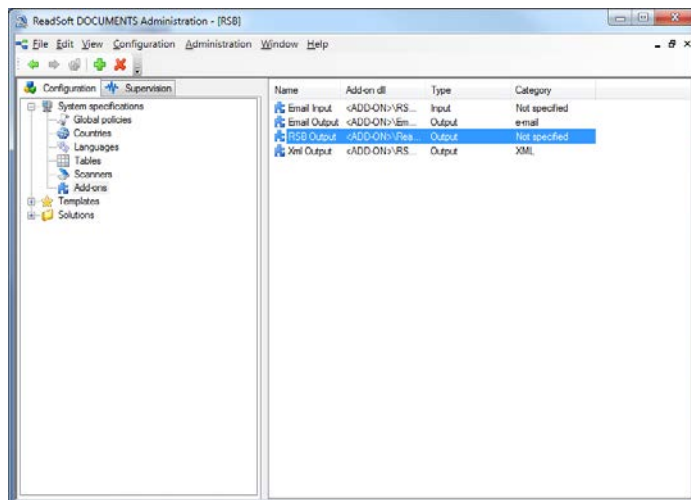
- **ReadSoft Service Bus and the adapters** - installs on any computer with network access to DOCUMENTS and PROCESSIT.
- **RSB plug-in for DOCUMENTS** - must be activated in the Administration module.

## RSB and adapters

Run the RSB installation package on any computer that has network access to DOCUMENTS and PROCESSIT. You can install RSB on the same computer as DOCUMENTS.

## RSB plug-in

When you install ReadSoft DOCUMENTS 6-4 or newer, the RSB Plug-in for DOCUMENTS is installed automatically and appears in the **Add-on** settings. This output add-on can only be used for documents; it does not support output for batches or compound documents.





# Configuration

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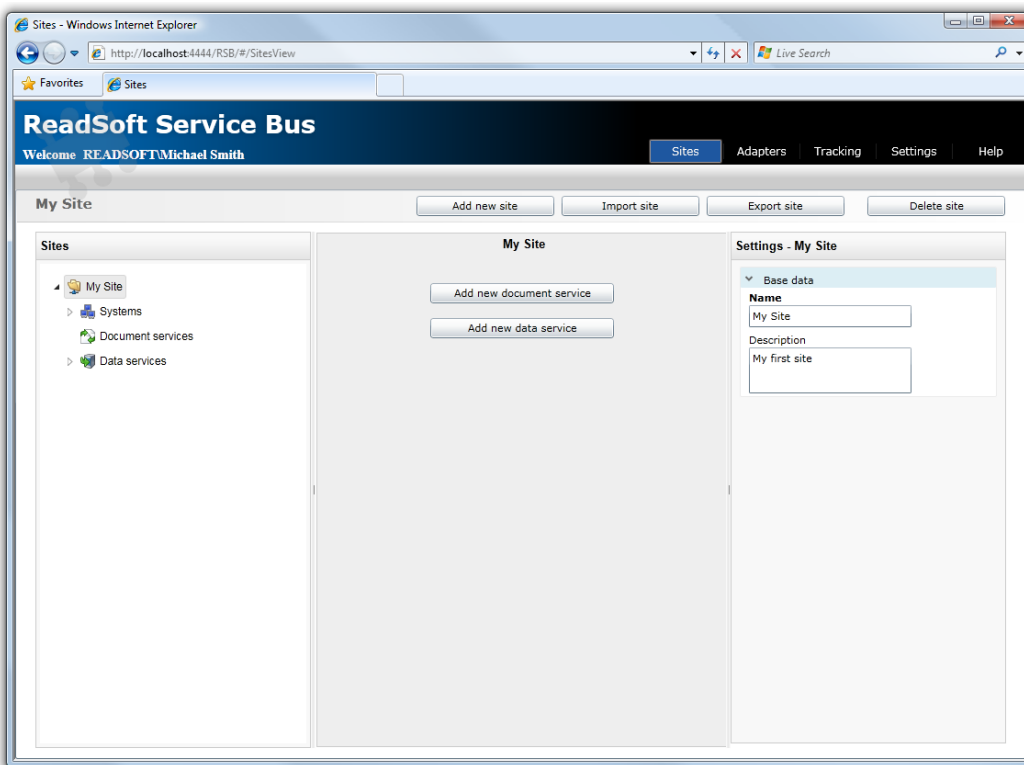
You complete these procedures to configure DOCUMENTS and RSB:

1. Creating a document service.
2. Configuring the RSB plugin for DOCUMENTS.
3. Mapping fields.

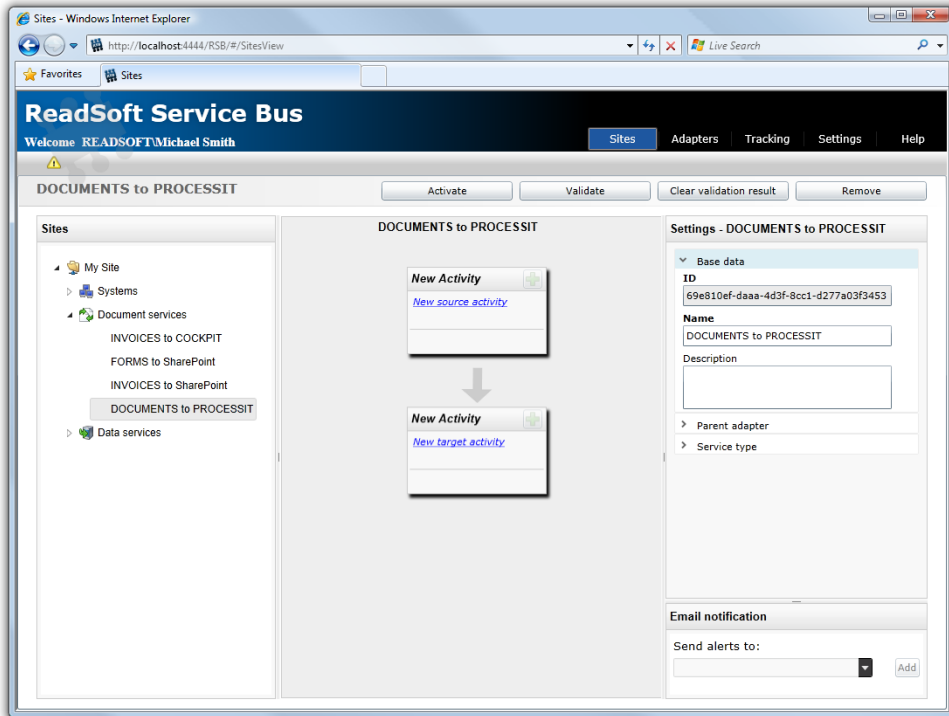
## Creating a document service

The DOCUMENTS to PROCESSIT Connector can be configured easily using the RSB administration page.

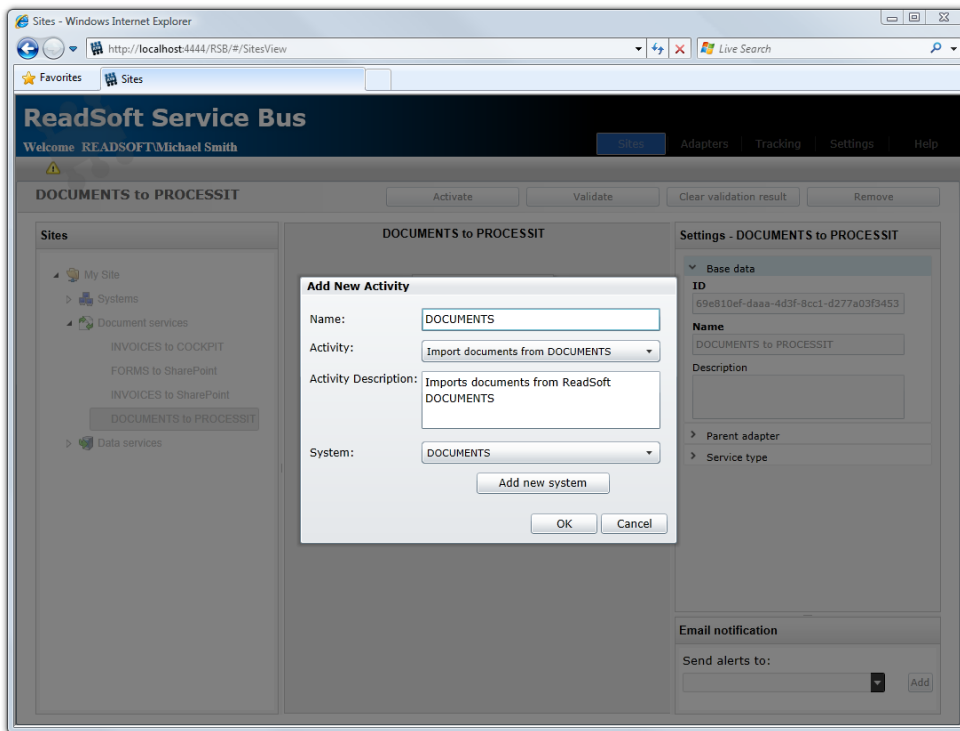
See Help for more details about the procedures outlined below.



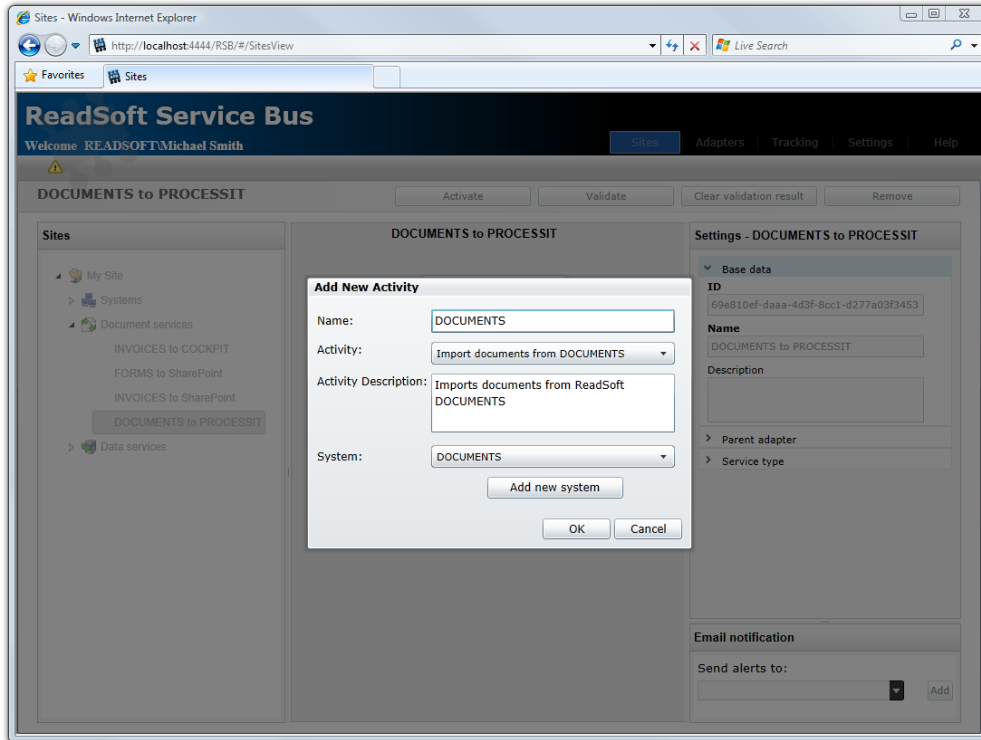
1. Add a new document service.



2. Create a new source activity: **Import documents from DOCUMENTS**.



3. Create a new target activity: **Export to PROCESSIT**.

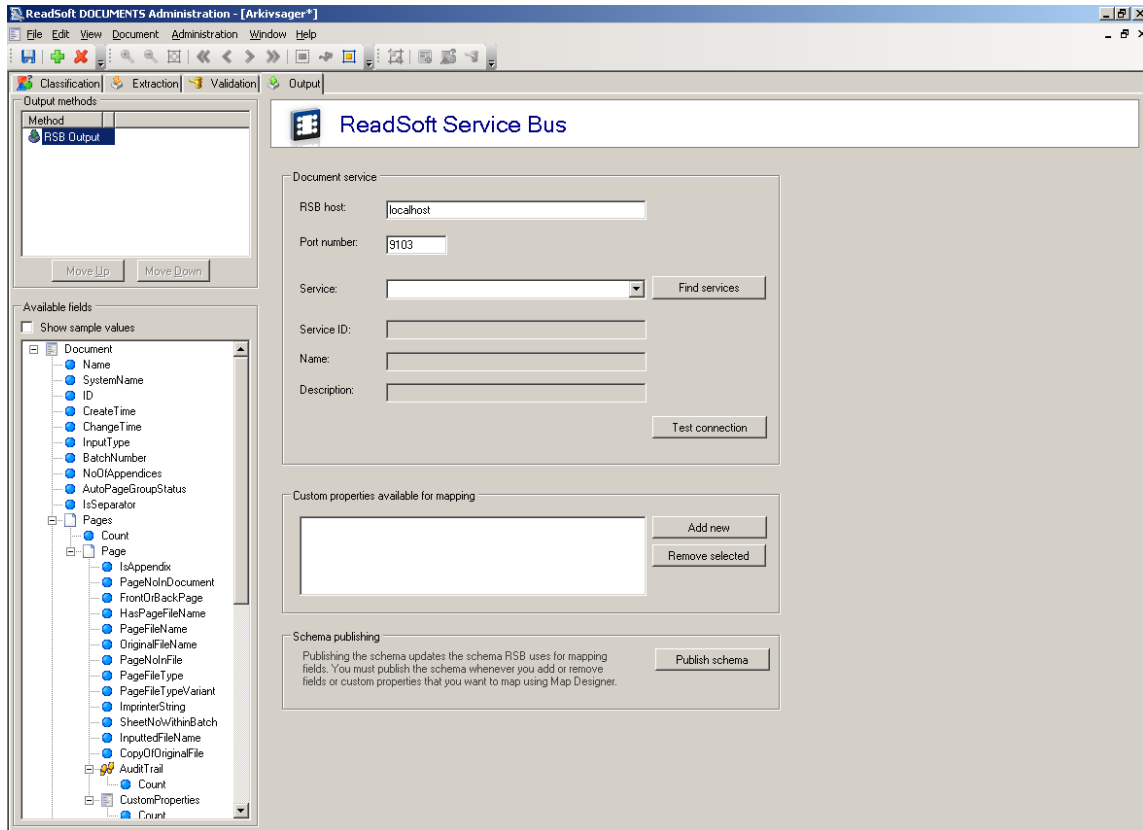


4. Select the PROCESSIT activity you created in the previous step and adjust the **System** settings. These settings specify the database and connection settings for Oracle and PROCESSIT.

## Configuring the RSB plugin for DOCUMENTS

You must configure the RSB plugin for DOCUMENTS before you can send invoices to PROCESSIT. This procedure assumes DOCUMENTS is already installed with a production environment that contains document descriptions. To configure the RSB plugin for DOCUMENTS:

- ❗ **You cannot use **Output methods** in the **Batch** settings, if you want to use RSB with DOCUMENTS.**
1. Using the ReadSoft DOCUMENTS Administration, expand the **Solutions** folder and expand the solution that contains the document specification you want to use with RSB.
  2. Select the **Documents** node and double-click the document specification you want to export. Select the **Output** tab in the dialog that appears.



3. Select the RSB plugin in the **Output methods** list.
4. Specify the address to RSB in the **Service** box. If the address is not filled in automatically, type: `net.tcp://localhost:9105/RepositoryService`

...where localhost is the computer name or IP address of the computer where RSB is installed.

🔴 If you have **Output methods** in the **Batch** settings, they override the **Output methods** in the **Document** settings defined in this procedure. Therefore, you cannot use **Output methods** in the **Batch** settings, if you want to use RSB with **DOCUMENTS**.

5. Click **Find services** to populate the **Service** box and select the service you want to use in the **Service** box.
6. Click **Test connection** to make sure the connection is working.

**RSB Host**

The host computer where RSB is installed.

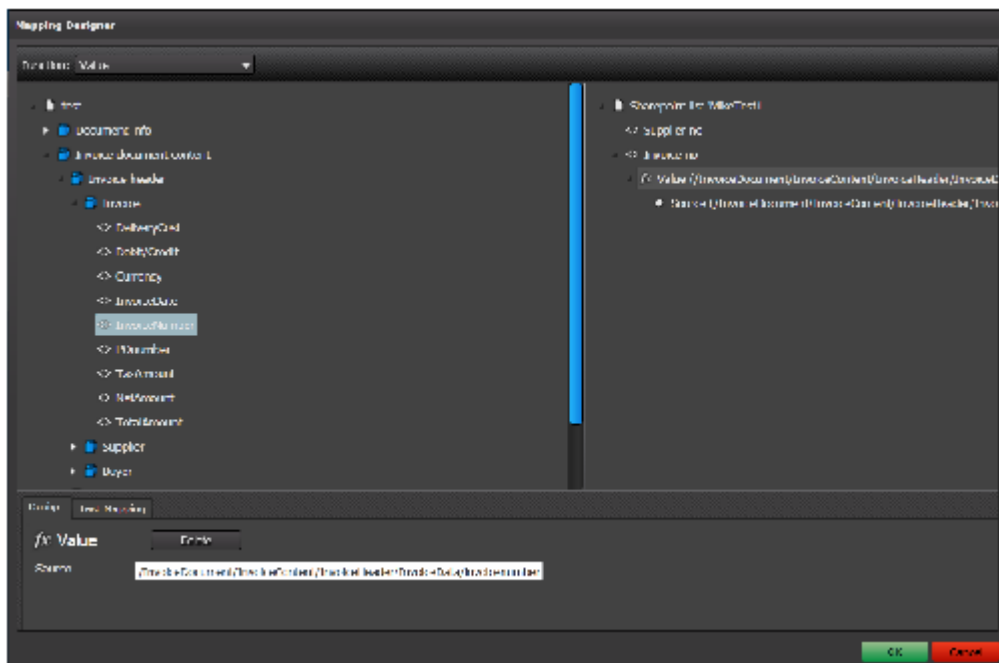
<b>Port number</b>	The port reserved for the service.
<b>Service</b>	Specifies the service you want to use. Click <b>Find services</b> to populate the <b>Service</b> box.
<b>Test connection</b>	Tests the connection to ReadSoft Service Bus and displays the results in a new dialog.
<b>Custom properties available for mapping</b>	Lists custom properties from DOCUMENTS that you can use when mapping fields with Map Designer. <ul style="list-style-type: none"> <li>• <b>Add new</b> - displays a dialog for adding a custom property to the list.</li> <li>• <b>Remove selected</b> - removes the selected custom property from the list.</li> </ul>
<b>Publish schema</b>	Updates the schemas Map Designer uses for mapping fields.

## Mapping fields

Mapping fields between two systems is easily managed using the Map Designer, an integrated tool in ReadSoft Service Bus that lets you connect corresponding fields and apply functions with an easy-to-use drag-and-drop interface. See Help for more details about the procedure below.

To map fields:

1. Return to the document-routing service you created in RSB and select the PROCESSIT activity in the design area.
2. Click **Edit map (Mapping settings)** to display the **Map Designer** dialog.



3. Select the function you want to perform from the **Function** list. Leave the default function if you want to perform a simple map.
4. Drag-and-drop a field from the source system, on the left side, to the corresponding target field on the right side. Depending on the function you use, you may need to adjust the settings in the Function details tab at the bottom of the dialog.
5. Click **OK** to save the settings.

The activity is now ready for use in the service. Be sure to activate the service configuration before you use it.