



INVOICES to PROCESSIT Connector

Product Description

July 2015 – ReadSoft AB

© 2015 Lexmark International Technology, S.A. All rights reserved.

Lexmark is a trademark of Lexmark International, Inc., registered in the U.S. and/or other countries. All other trademarks are the property of their respective owners. No part of this publication may be reproduced, stored, or transmitted in any form without the prior written permission of Lexmark.

27072015.1005

Contents

Overview	4
The INVOICES to PROCESSIT Connector	4
Key concepts and features	4
Components	5
Supported systems	5
Installation	6
Configuration	7
Document-routing services	7
Data services	9
Configure the RSB plugin for INVOICES	13
Map fields	14

Overview

This document describes the *INVOICES 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.



The INVOICES to PROCESSIT Connector

The INVOICES to PROCESSIT Connector facilitates communication between ReadSoft INVOICES and PROCESSIT. Using RSB's administration page, you can easily route document information from INVOICES to PROCESSIT.

Key concepts and features

The *INVOICES to PROCESSIT Connector* makes it easy to send documents from INVOICES to PROCESSIT easy, and has the following features:

- Document-routing services automatically send invoices from INVOICES to PROCESSIT.
- Data services automatically retrieve data from Oracle for use with validation in INVOICES.
- Provides document tracking and troubleshooting functions.
- Quick and easy setup compared to traditional methods.



Components

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

- **RSB plug-in**—connects INVOICES to the INVOICES adapter.
- **INVOICES adapter**—transforms invoice data to a common format.
- **RSB**—coordinates communication between adapters.
- **PROCESSIT adapter**—sends invoice data and image files to PROCESSIT.

Supported systems

The following systems are supported:

- INVOICES 5-5 SP5 Hotfix 1 or newer.
- ReadSoft Service Bus 2-1 or newer.
- PROCESSIT 7-1 or newer.

Installation

The INVOICES to PROCESSIT Connector installation contains two parts:

- **ReadSoft Service Bus and the adapters** - installs on any computer with network access to INVOICES and PROCESSIT.
- **RSB plug-in for INVOICES** - must be installed on at least one computer that runs the INVOICES Manager module and all computers that run the INOVICES Transfer modules.

If you want to use data services for validation, you must also install the plug-in on computers than run the Interpret and Verify modules.

Configuration

After you install ReadSoft Service Bus and the appropriate adapters and plugins, you must configure RSB. The basic steps you perform are:

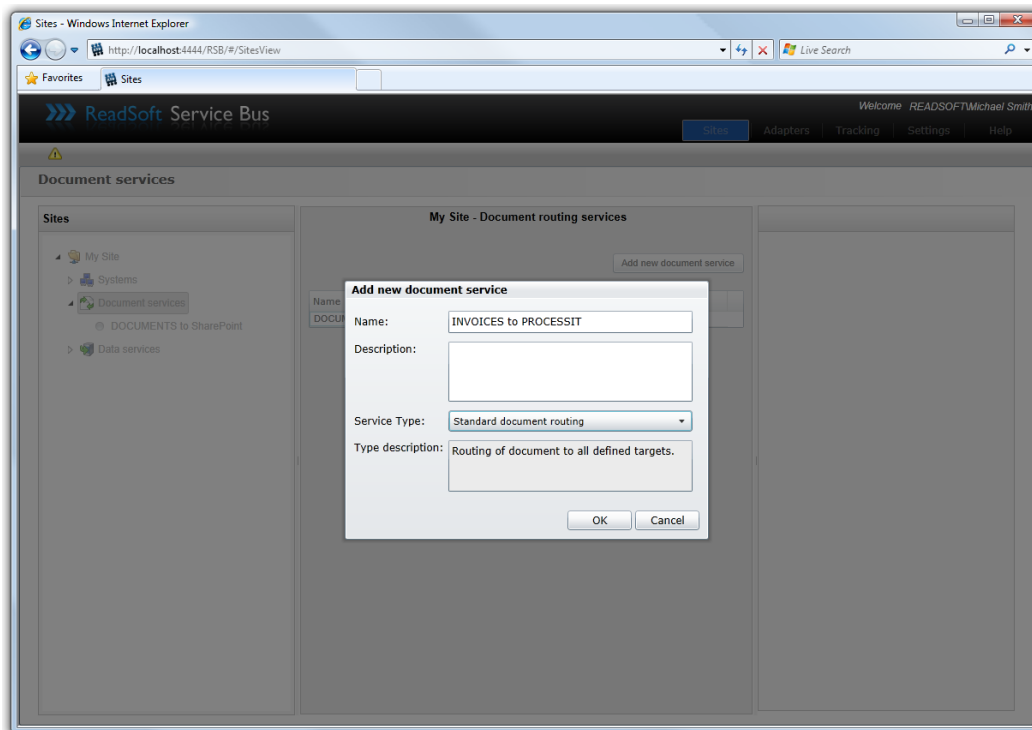
1. Create document services and/or master-data services.
2. Configure the RSB plug-in for INVOICES.
3. Configure the adapters.
4. Map fields between systems.

The steps above are outlined in the remainder of this document. For more details about each step, see Help, where you can find more information and videos.

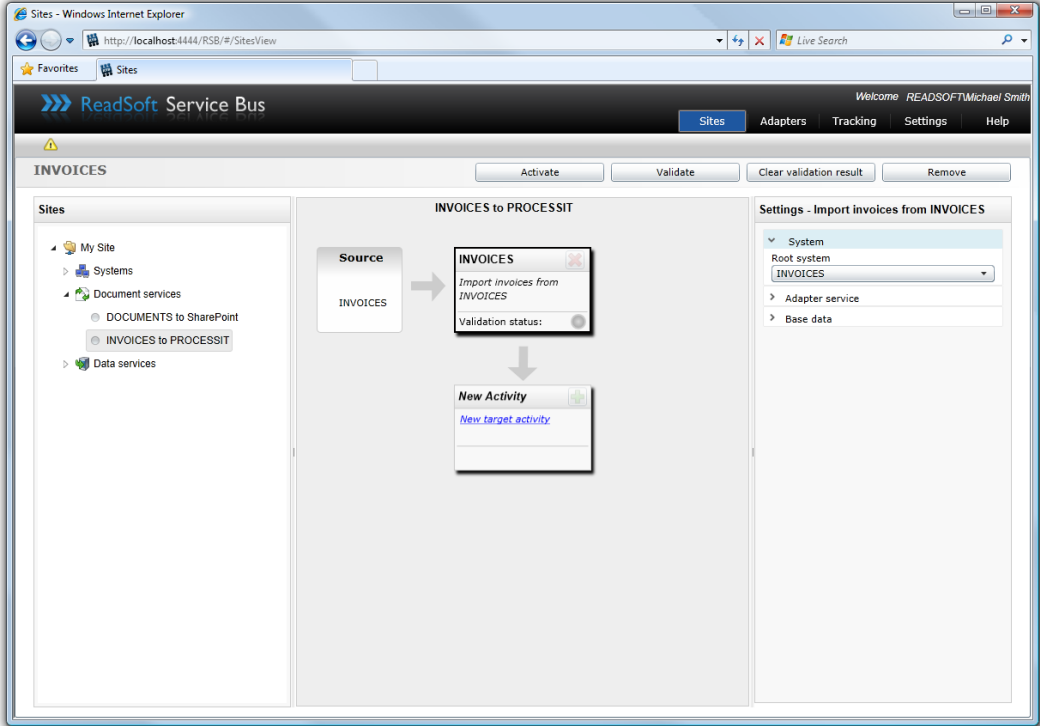
Document-routing services

To create a document service using RSB Administration:

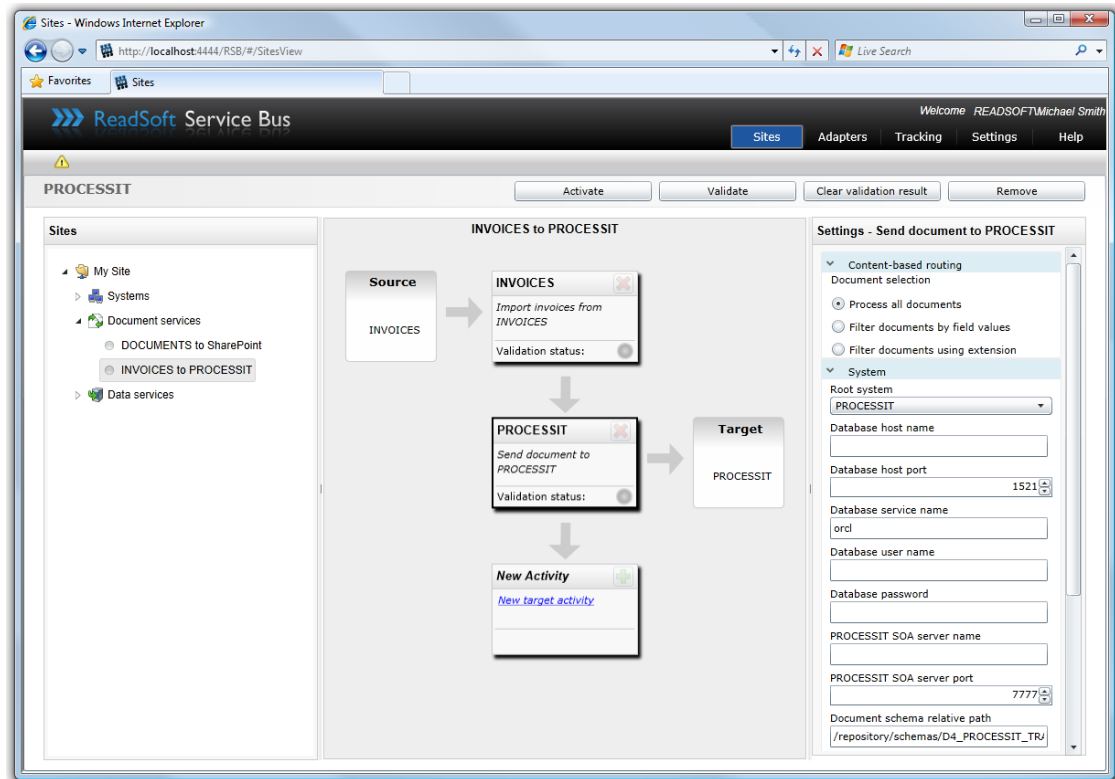
1. Select the **Document services** node and click **Add new document service**.
2. Select **Standard document routing** as the **Service type**.



- 3. Create a new source activity and select **Import invoices from INVOICES** as the **Activity**.



- 4. Create a new target activity and select **Send document to PROCESSIT** as the **Activity**.



5. Select the PROCESSIT activity you created in the previous step and adjust its settings. See Help for more information about these settings.

Note: The database settings are only required if you use data services (described in the next section).

6. [Configure the RSB plugin for INVOICES.](#)
7. Return to RSB Administration and [map fields](#) between INVOICES and PROCESSIT.

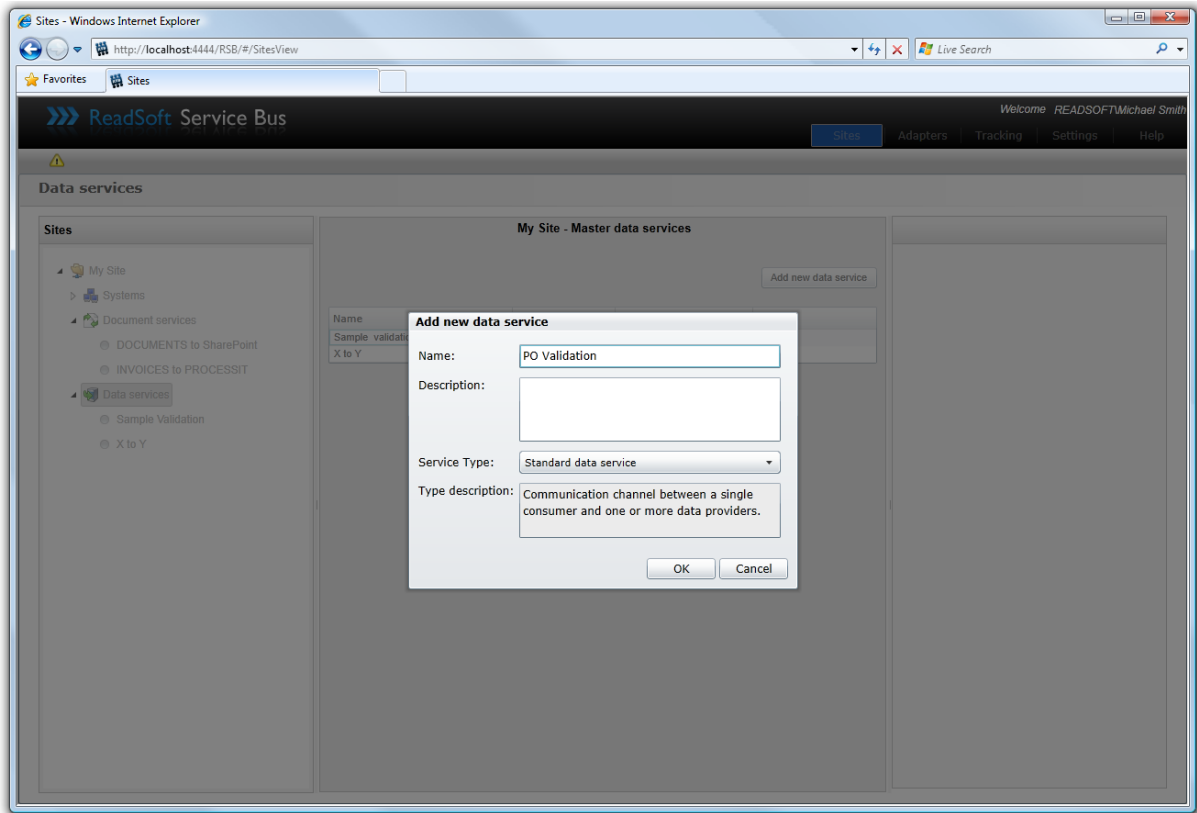
The activity is now ready for use in the service. Be sure to activate the service configuration before you use it.

Data services

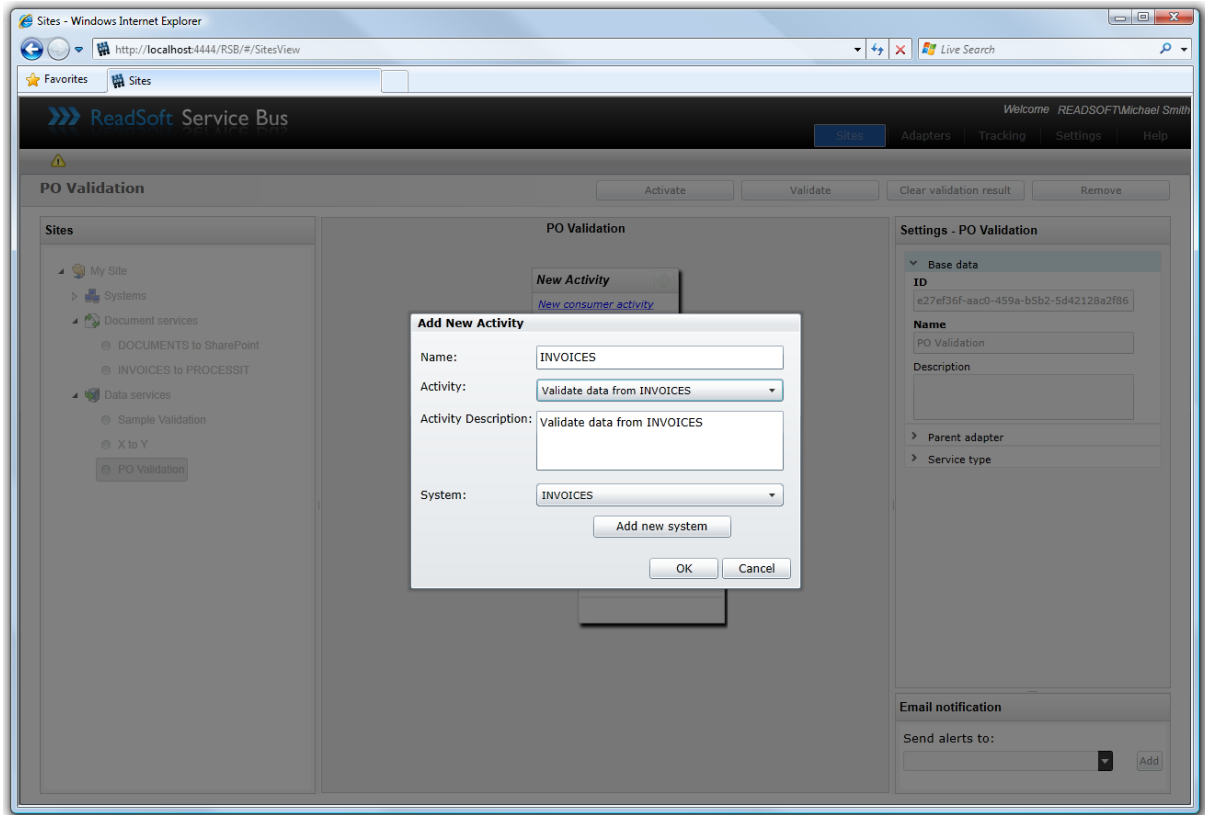
In addition to document-routing service, the INVOICES to PROCESSIT Connector provides data services which can retrieve data from Oracle for use with validation in INVOICES.

To create a data service using RSB Administration:

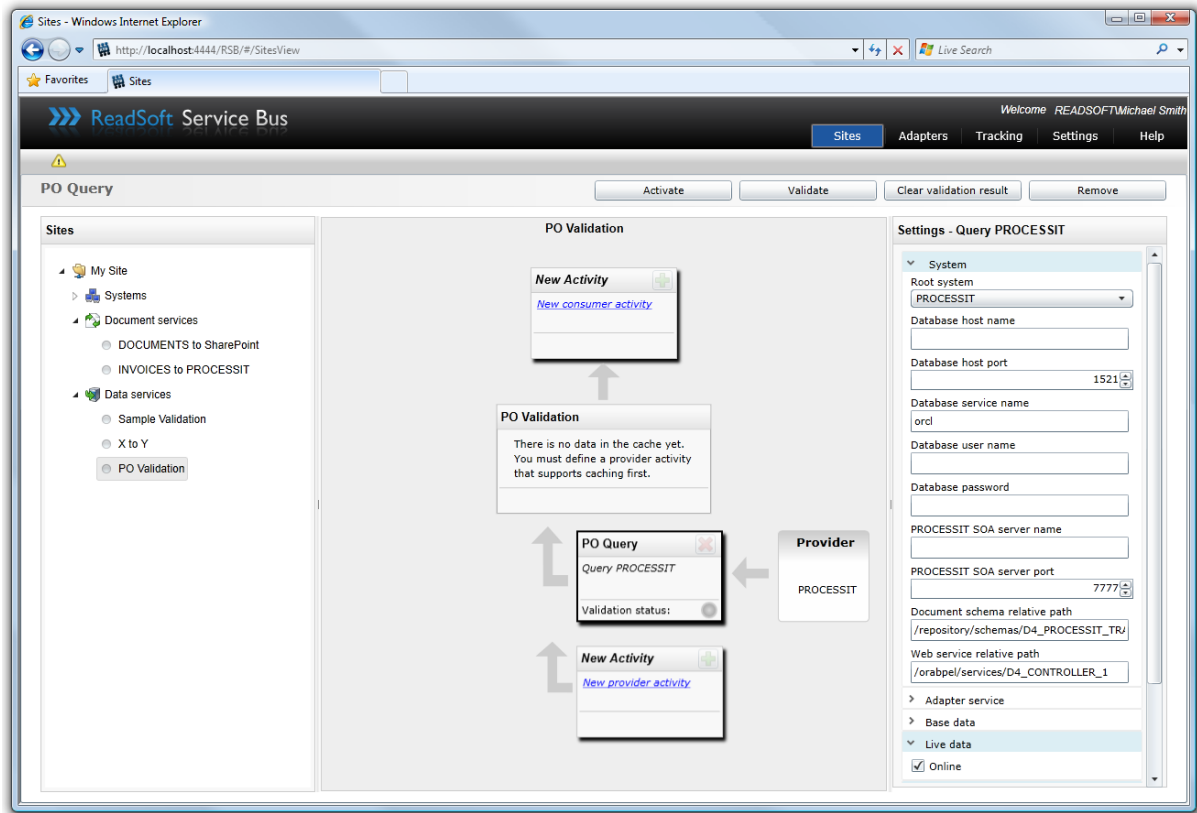
1. Select the **Data services** node and click **Add new data service.**



2. Select **Standard data service** as the **Service type**.
3. Create a new consumer activity and select **Validate data from INVOICES** as the **Activity**.



4. Create a new provider activity and select **Query PROCESSIT** as the **Activity**.



5. Complete the **System settings** needed to connect to the database.
6. Type a query in the **SQL query** box. The **SQL query** box specifies an SQL query that is used in conjunction with the **Configure field validations** dialog which is accessed from the ReadSoft Service Bus plugin for INVOICES.

When writing the SQL query, you must enclose the parameters with braces, and you cannot use braces for any other purpose. You must also use the aliases, "Data" and "Comment".

Example

```
Select "PO_NUMBER" as "Data", "VENDOR_NAME" as "Comment" from
xxit3_purchase_order_v where vendor_id={vendor_id} and po_number={int:
PO_Number}
```

Note that the data type of the parameter can be declared before the field name. If you do not declare the data type, it defaults to string. The following data types are valid:

- Int
- int32
- int16
- string
- datetime
- datetime2
- double
- decimal
- guid

The fields that you specify in braces in the SQL query appear in Map Designer when you map fields.

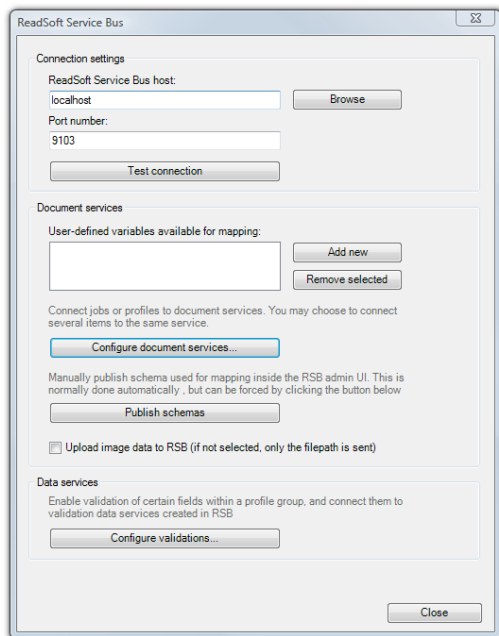
🔴 If you change SQL query after you map fields, you must click **Edit Map** again and click **Update target schema**.

7. [Configure the RSB plugin for INVOICES](#).
8. Return to RSB Administration and [map fields](#) between INVOICES and PROCESSIT.

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

Configure the RSB plugin for INVOICES

1. Using the INVOICES Manager module, select **RSB Plugin configuration (Plug-ins menu)**. The **ReadSoft Service Bus** dialog appears.

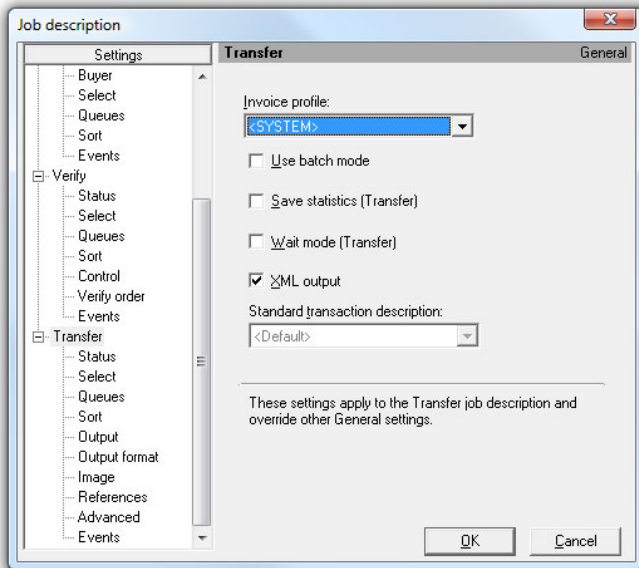


2. Specify the computer where RSB is installed in the **ReadSoft Service Bus host** box.
3. Adjust the **Document services** and/or **Data services** settings according to your requirements. See Help for more details about these settings.

After you adjust the settings and close the dialog, schemas are published, so you can map fields using RSB Administration.

Adjust the Transfer job description

In order to use RSB with INVOICES, you must enable XML output in the Transfer job description.



Map fields

Mapping fields between two systems is easily managed using the Map Designer, an integrated tool 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. 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.