

INVOICES to PROCESSIT Connector

Product Description

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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.

Favorites Favorites
Welcome READSOFTMichael Smith Sites Adapters Tracking Settings Help C Document services Document services
Adapters Tracking Settings Help A Document services
▲ Document services
Document services
Sites My Site - Document routing services
Add new document service
Add new document service
ODCLUMENTS to SharePoint Name: INVOICES to PROCESSIT
> 🚱 Data services Description:
Service Type: Standard document routing
Type description: Routing of document to all defined targets.
OK Cancel

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

	-	 ✓ X Z Live Search ✓ ✓
		Welcome READSOFTWichael Smith
	Sites	Adapters Tracking Settings Help
	Activate Validate	Clear validation result Remove
	INVOICES to PROCESSIT	Settings - Import invoices from INVOICES
Source	Import involces from Import involces from Validation status:	 System Root system INVOLCES Adapter service Base data
	Source	Sites Activate Validate INVOICES to PROCESSIT Source Import invoices from Invoices from Invoices INVOICES Validation status: Weiw Activity Validation status:

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. <u>Configure the RSB plugin for INVOICES</u>.
- 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**.

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>>>> ReadSoft Service Bus		Welcome READSOFTWichael Smith
		Sites Adapters Tracking Settings Help
Data services		
Sites	My Site - Master data services	
· Statuto Sta		
> Systems		Add new data service
Document services	Add new data service	
DOCUMENTS to SharePoint X to Y	Name: PO Validation	
INVOICES to PROCESSIT		
Data services	Description.	
Sample Validation		
101X ()	Service Type: Standard data service	•
	Type description: Communication channel between a s	ingle
	consumer and one or more data prov	viders.
	OK	Cancel

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

Sites - Windows Internet Explorer		
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🖌 🚳 My Site		✓ Base data
Systems	New Activity	ID
Document services	Add New Activity	Name
		PO Validation
	Name: INVOICES	Description
🔺 🖏 Data services	Activity: Validate data from INVOICES -	
	Activity Description: Validate data from INVOICES	
		Parent adapter
		Service type
	System: INVOICES ·	
	Add new system	
	OK Cancel	
		Email notification
		Send alerts to:
		Add

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

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B ,		Welcome READSOET Michael Sm
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PO Query	Artivata Validata	Clear validation result Remove
i o çuciy	Activate	Clear valuation result Remove
Sites	PO Validation	Settings - Query PROCESSIT
4 🗐 My Sito		✓ System
	New Activity	Root system
Systems	New consumer activity	PROCESSIT
Document services		Database host name
OCUMENTS to SharePoint		Database host port
INVOICES to PROCESSIT		1521
🔺 剩 Data services		Database service name
Sample Validation	PO Validation	orc
● X to X	There is no data in the cache yet	Database user name
PO Validation	You must define a provider activity	
	that supports caching first.	Database password
1		
		PROCESSIT SOA server name
	PO Query Provider	
	Query PROCESSIT	PROCESSIT SOA server port
	PROCESSIT	7777
	Validation status:	Document schema relative path
		/repository/schemas/D4_PROCESSIT_TR/
	New Activity	Web service relative path
	New provider activity	/orabpel/services/D4_CONTROLLER_1
	Here provider activity	> Adapter service
		> Base data
		✓ Live data
		✓ Online
		· ·

- 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.

	563
Connection se	tings
ReadSoft S	ervice Bus host:
localhost	Browse
Port numbe	r:
9103	
	Test connection
Document sen	ices
User-define	d variables available for mapping:
	Add new
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Manually pr normally do	nfigure document services blish schema used for mapping inside the RSB admin UI. This is ne automatically , but can be forced by clicking the button below Publish schemas
Co Manually pr normally do	nfigure document services blish schema used for mapping inside the RSB admin UI. This is ne automatically , but can be forced by clicking the button below Publish schemas mage data to RSB (if not selected, only the filepath is sent)
Control of the services of the	Infigure document services blish schema used for mapping inside the RSB admin UI. This is ne automatically , but can be forced by clicking the button below Publish schemas mage data to RSB (if not selected, only the filepath is sent) dation of certain fields within a profile group, and connect them to at services created in RSB Configure validations
Co Manually pr normally do Upload Data services Enable vali- validation d	nfigure document services blish schema used for mapping inside the RSB admin UI. This is ne automatically, but can be forced by clicking the button below Publish schemas mage data to RSB (if not selected, only the filepath is sent) dation of certain fields within a profile group, and connect them to at services created in RSB Configure validations

- 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.

Settings	Transfer Genera
Buyer Select Queues Sort Events Verify Status Select Queues Sort Control Verify order Events Transfer Status Select	Invoice profile: SYSTEM> Save statistics (Transfer) Wait mode (Transfer) Standard transaction description: CDefault> V
Gueues Sort Output Output format Image References Advanced Events	These settings apply to the Transfer job description and override other General settings.

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 dragand-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.