INVOICES to PROCESS DIRECTOR Connector

Product Description

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Overview

This document describes the *INVOICES to PROCESS DIRECTOR* 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 INVOICES to PROCESS DIRECTOR Connector

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

Key concepts and features

The *INVOICES to PROCESS DIRECTOR* Connector:

- Document-routing services automatically send purchase orders from DOCUMENTS to PROCESS DIRECTOR.
- Provides document tracking and troubleshooting functions.
- Quick and easy setup compared to traditional methods.

Components

The INVOICES to PROCESS DIRECTOR Connector is composed of the following parts:

- **RSB plug-in for DOCUMENTS**—connects DOCUMENTS to the DOCUMENTS adapter.
- **DOCUMENTS adapter**—transforms invoice data to a common format.
- **RSB**—coordinates communication between adapters.
- **PROCESS DIRECTOR adapter**—sends purchase-order data and image files to PROCESS DIRECTOR.

Supported systems

The following systems are supported:

- ReadSoft DOCUMENTS 6-4 or newer.
- ReadSoft Service Bus.
- PROCESS DIRECTOR 1.1.

Installation

The INVOICES to PROCESS DIRECTOR Connector installation contains two parts:

- **ReadSoft Service Bus and the adapters**—installs on any computer with network access to INVOICES and PROCESS DIRECTOR.
- **RSB plug-in for INVOICES**—must be installed on at least one INVOICES Manager module and all Transfer modules.

RSB and adapters

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

RSB plug-in

Run the RSB plug-in installation on at least one INVOICES Manager module and all Transfer modules. After you set up RSB, you must configure the plug-in from the Manager module (described later in this document). You do not need to configure the plug-in for the Transfer module.

Configuration

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

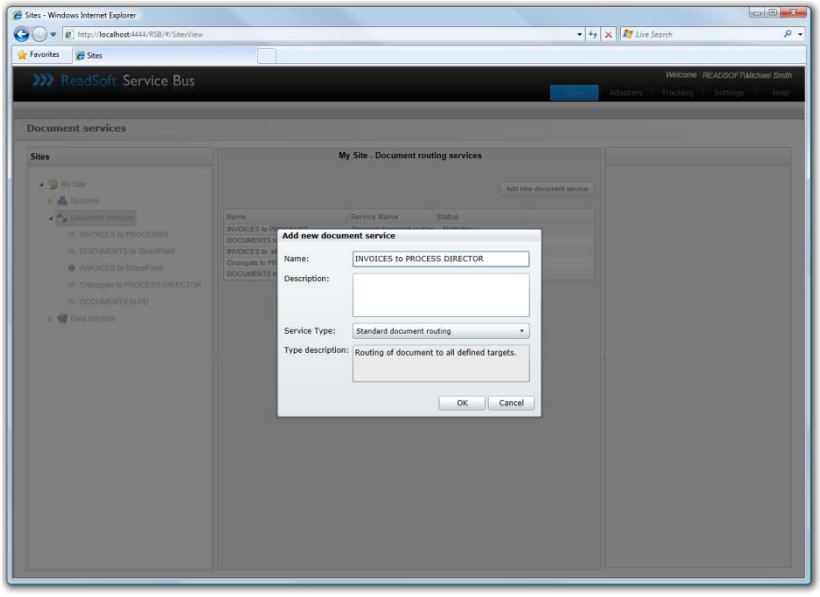
1. Create a document service to coordinate the transfer of documents.
2. Configure target activity settings.
3. Configure the RSB plugin (add-on).
4. Map fields between the systems.

Create a document service

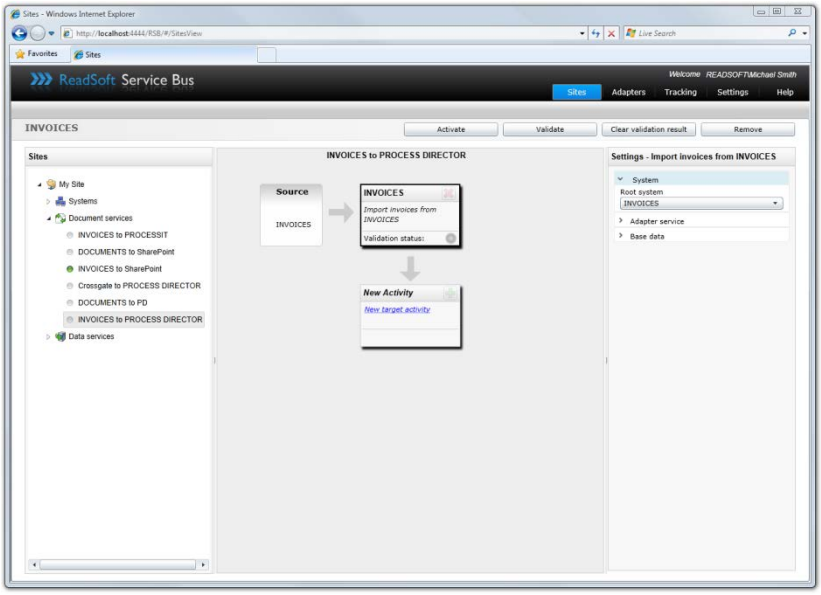
You configure the INVOICES to PROCESS DIRECTOR Connector using the RSB administration page.

See Help for more details about the procedures outlined below.

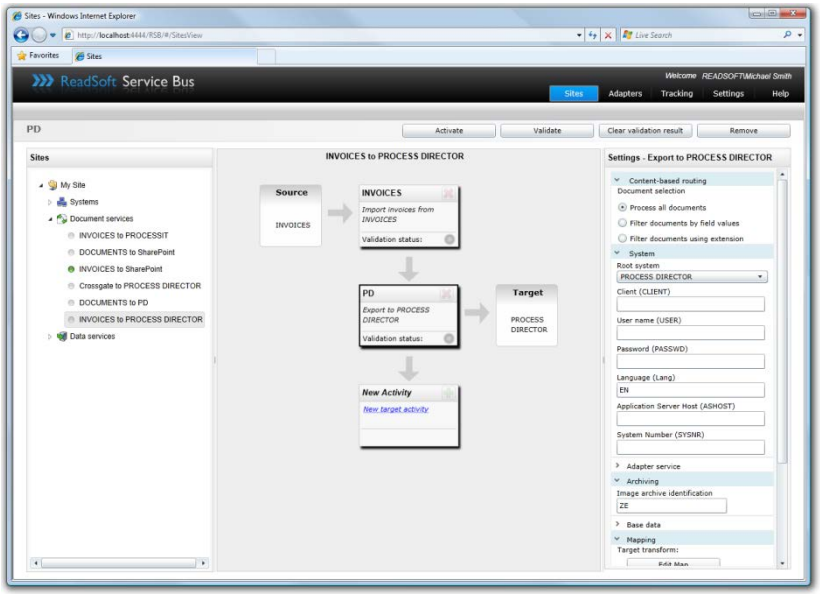
5. Select the **Document services** node and click **Add new document service**.
6. Select **Standard document routing** as the **Service type**.



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



8. Create a new target activity and select **Export document to PROCESS DIRECTOR** as the **Activity**.



9. Adjust the target activity settings.

10. Configure the RSB plugin (add-on).

11. Map fields between INVOICES and PROCESS DIRECTOR.

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

Map fields

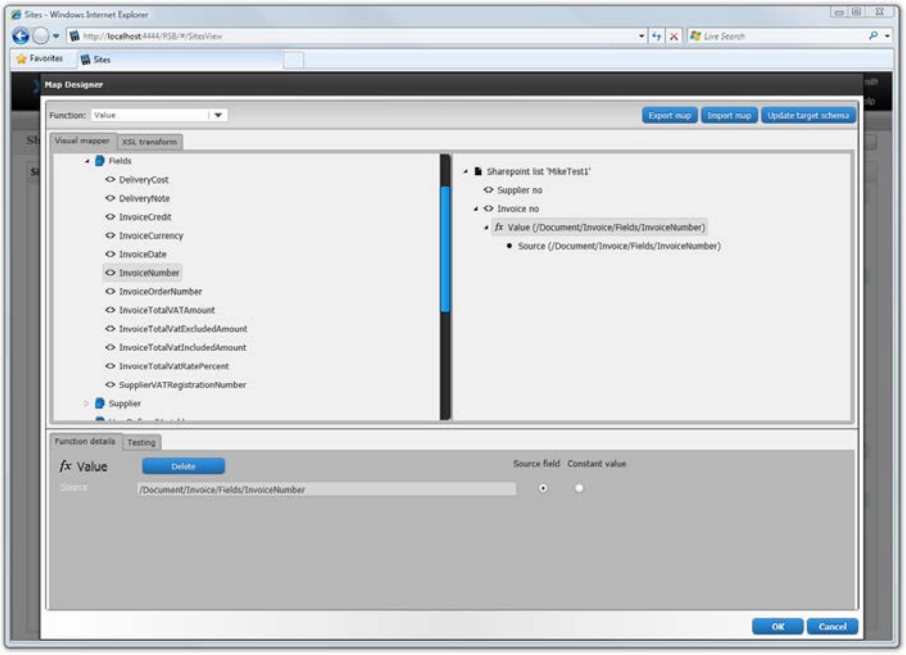
Mapping fields between two systems is easily managed using the Map Designer, an integrated tool that lets you connect corresponding fields and apply functions with an easy-to-use drag-and-drop interface.

When you map fields for the INVOICES to PROCESS DIRECTOR Connector, you create a map that tells RSB what invoice data you want to appear in columns in the SharePoint document library.

See Help for more details about the procedure below.

1. Select the PROCESS DIRECTOR 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.

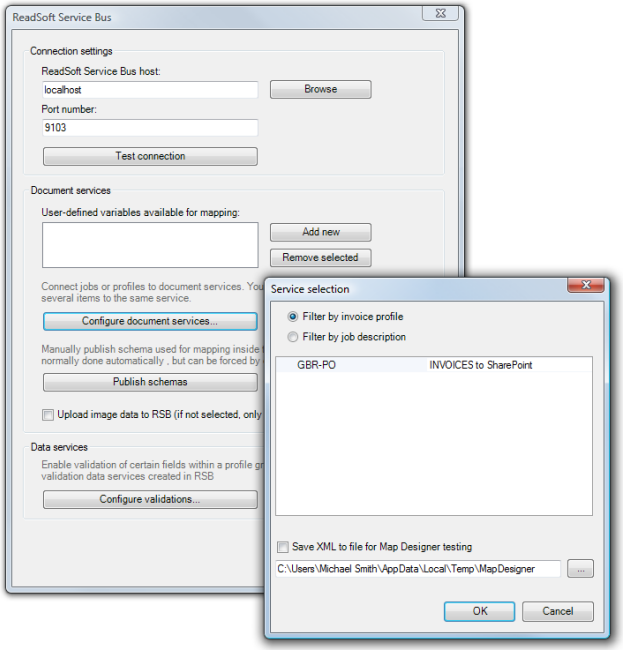
Configure the RSB plugin for INVOICES

You must configure the RSB plugin for INVOICES before you can send invoices to SharePoint. To configure the RSB plugin for INVOICES:

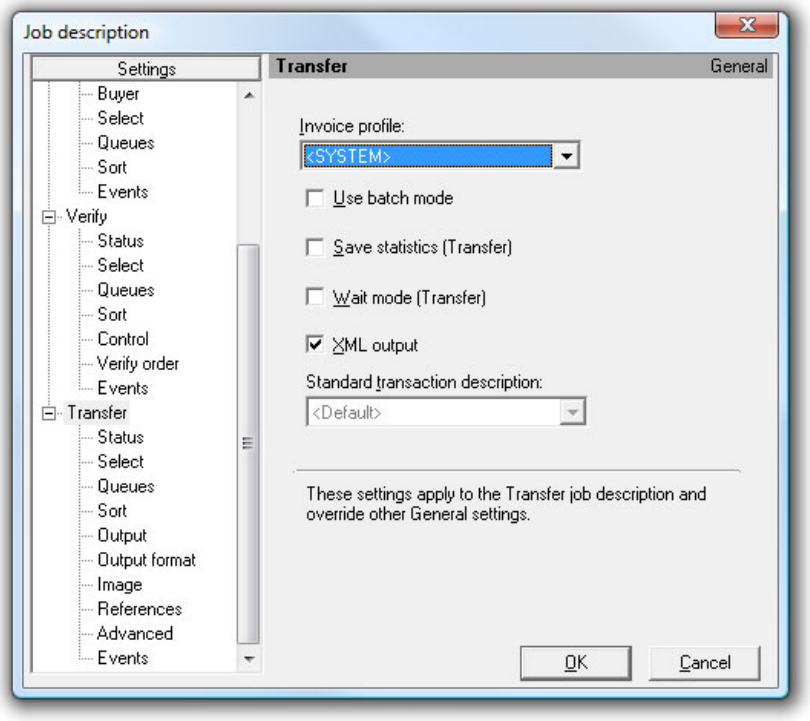
1. Using the INVOICES Manager module, select **ReadSoft Service Bus** (**Plug-ins** menu). The ReadSoft Service Bus - Plugin dialog appears.

2. Specify the computer where RSB is installed in the **ReadSoft Service Bus host** box. You can type “localhost” if RSB is installed on the same computer as the Manager module.

3. Click **Configure document services** and use the dialog that appears to specify which invoice profiles or job descriptions you want to use with RSB.



   If you select **Filter by invoice profile**, for example, select the appropriate document service from the drop-down list next to the invoice profile you want to connect to RSB.

4. Close the dialog to save the settings.

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