

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

Brent Lowe

Ben Bruno

STR Software

- **STR Software**

- Located in Richmond, VA
- Focused on document delivery solutions since 1988
- Over 1,230 licenses of AventX in 47 states and 19 countries
- Over 94% customer retention
- Oracle Gold Partner with staff of Oracle Certified Professionals
- OAUG 3-star partner for 2010
- www.strsoftware.com

- **Brent Lowe**

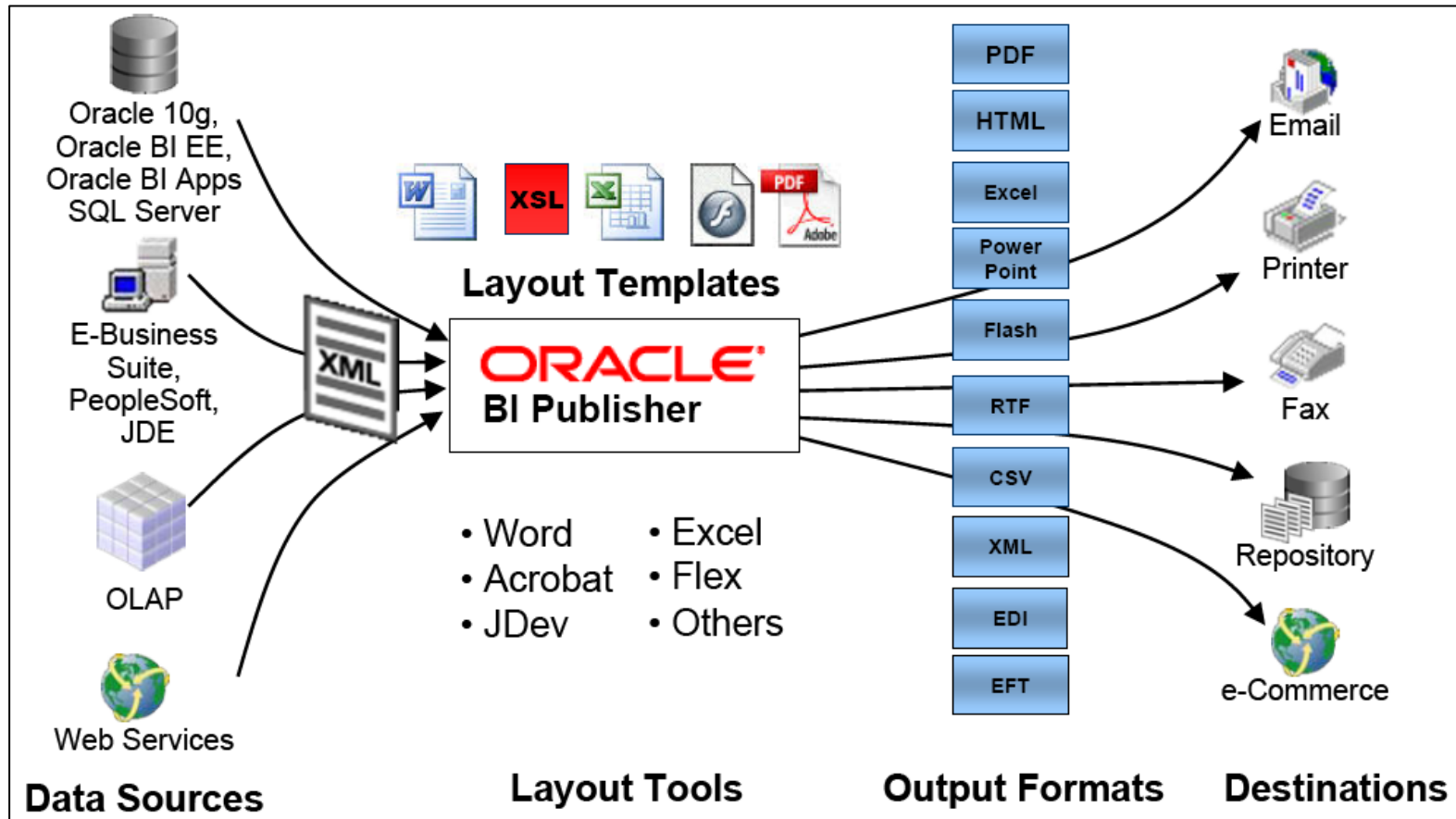
- Manager of Product Development
- BS in Computer Science from College of William and Mary
- 804-897-1600 ext. 132 and brent.lowe@strsoftware.com
- www.thelowedownblog.com

- **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

- Introduction to BI Publisher
- Best Implementation Practices with BI Publisher
- BI Publisher and Document Delivery
- Extend and enhance BI Publisher Capabilities with AventX
- Success Stories
- Q&A

Introduction – BI Publisher





Best Implementation Practice

Get to the Latest Version of BIP
for EBS

10.1.3.4.1

5.6.3

?? ? ? ? ? ? ? BI Publisher

XML Publisher



Get to the Latest Version of BIP for EBS

BI Publisher == XML Publisher

For EBS: 5.6.3

Running 11i -> MOS 422508.1 – About Oracle XMLP Release 5.6.3

Running R12 -> Congrats, you already have 5.6.3!



Get to the Latest Version of BIP for EBS

Patch 5.6.3!

MOS 1138602.1 – Overview of Available Patches for Oracle XML Publisher (embedded in Oracle E-Business Suite)

Some Individual Patches are available

Patch Sets are rolled into ATG Family Packs



Best Implementation Practice

Know Oracle's Published Best Practices

[Oracle Technology Network](#) > [Middleware](#) > [BI Publisher](#) > [Overview](#)

Overview
Downloads
Documentation
Community
Learn More

- Fusion Middleware Home
- AIA Foundation Pack
- Business Intelligence
- Coherence
- Developer Tools
- Event-Driven Architecture Suite
- GlassFish Server
- Identity Management
- JRockit
- SOA Suite
- TopLink
- Tuxedo
- WebCenter Suite
- WebLogic Server
- Complex Event Processing
- Business Intelligence Foundation
- Data Integration
- Application Server
- Beehive
- BEA Process Manager

Oracle BI Publisher

Oracle Business Intelligence Publisher (BI Publisher, formerly XML Publisher) is an enterprise reporting solution to author, manage, and deliver all types of highly formatted documents eliminating the need for costly point solutions. Built on open standards, IT staff and developers can create data models against practically any data source and use BI Publisher APIs to build custom applications leveraging existing data sources and infrastructure. End users can easily design report layouts using familiar desktop tools, dramatically reducing the time and cost needed to develop and maintain reports. Extremely efficient and highly scalable, BI Publisher can generate tens of thousands of documents per hour with minimal impact to transactional systems. Reports can be viewed online or scheduled for delivery to a wide range of destinations.

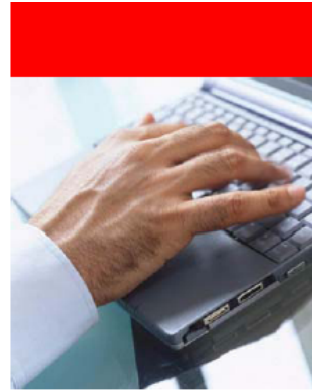
Getting Started

- [BI Publisher Overview Presentation](#)
- [BI Publisher - The Reporting Platform for Applications](#)
- [Oracle BI Publisher Datasheet](#)
- [Getting Started Tutorial](#)
- [Samples](#)
- [Oracle BI Publisher - Benefits - Flash](#)
- [Oracle BI Publisher - Quick Tour - Flash](#)

Papers & Presentations

- [Document Lifecycle using Oracle BI Publisher, Universal Content Management, and ADF. Includes sample code.](#)
- [Oracle BI Publisher Best Practices](#)
- [Converting Oracle Reports, Crystal, or Actuate to BI Publisher](#)
- [Sub Templates in Oracle BI Publisher](#)
- [Integrating BI Publisher w/Microsoft SharePoint](#)
- [Enabling Row-Level Security with BI Publisher](#)

Program Agenda



- Oracle BI Publisher Enterprise Overview
- System Configuration Guidelines
- BI Publisher Server Configuration Options
- Report Design Best Practices
 - Data Modeling Guidelines
 - Template Design Guidelines
- Q & A
- Covers:
 - Large data set strategies
 - XML structures
 - Lots of great template tips for performance, consistency, formatting



Best Implementation Practice

Utilize the Correct Tools for your
version of BIP

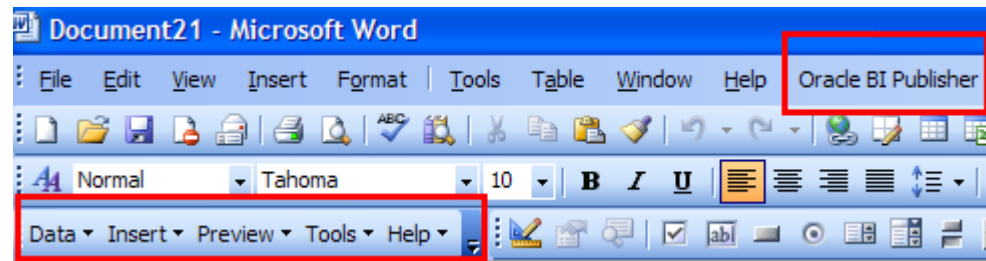
Utilize the Correct Tools

- BI Publisher Desktop

Latest version is 10.1.3.4.1

Use the version built with the same libraries as 5.6.3 -> 10.1.3.2

Patch 5887917



- BI Publisher Toolbox

<http://bipublisher.blogspot.com/>

Bursting Designer

Delivery Designer

Report Conversion



Best Implementation Practice

Know what BIP is Capable of
Within Different Applications



All applications do not follow ATG's lead

- Advanced Collections
- Payables
- Purchasing

<http://www.thelowedownblog.com>



Best Implementation Practice

Understand How To Troubleshoot



Understand How to Troubleshoot

1. Output Post Processor Log Files
2. `xdodebug.cfg` -> `$AF_JRE_TOP/lib`
 `LogLevel=STATEMENT`
 `LogDir=<Directory>`

xdo.log (main log file)

xdo_...xml (Especially helpful when bursting)

xdo_...out (output file)

xdo_...xsl (XSL-FO version of RTF)

xdo_...fo (temp file created when converting RTF to XSL-FO)



Best Implementation Practice

Know When To Ask For Help
and How and Where To Ask
For It

Know When/How/Where to Ask For Help!



AVENTIX Help! - Documentation

- Documentation!

Oracle Technology Network > Middleware > BI Publisher > Documentation

Overview Downloads **Documentation** Community Learn More

Oracle Business Intelligence Publisher 11g Release 1 (11.1.1.3)

- 11.1.1.3.0 [Documentation Page](#)

Oracle BI Publisher 10g

- 10.1.3.4 [Documentation Page](#)
- 10.1.3.3 [Documentation Page](#)
- 10.1.3.2 [Documentation Page](#)
- 5.6.2 [Users Guide](#) [Install Guide](#) [JavaDocs](#)

Oracle E Business Suite R12

- 12.0 [Resources](#) [Document](#) [Known Issues](#) [Administration and Developer's Guide](#) [Report Designer's Guide](#)

Oracle E Business Suite 11i

- 5.6.3 [Resources](#) [Document](#) [Known Issues](#) [Administration and Developer's Guide](#) [Report Designer's Guide](#)
- 5.6.2 [About Document](#) [Users Guide](#) [Applications API](#) [Core Components API](#)
- 5.6.1 [About Document](#) [Users Guide](#) [Applications API](#) [Core Components API](#)
- 5.6 [About Document](#) [Users Guide](#) [Applications API](#) [Core Components API](#)
- 5.5 [About Document](#) [Users Guide](#) [Applications API](#) [Core Components API](#)

Navigation Menu:

- Fusion Middleware Home
- AIA Foundation Pack
- Business Intelligence
- Coherence
- Developer Tools
- Event-Driven Architecture Suite
- GlassFish Server
- Identity Management
- JRockit
- SOA Suite
- TopLink
- Tuxedo
- WebCenter Suite
- WebLogic Server
- Complex Event Processing
- Business Intelligence Foundation
- Data Integration
- Application Server



Help! - Debugging

- Turn on debugging
- Review the logs



Help! - Blogs

- Tim Dexter/BIP Official Blog: <http://blogs.oracle.com/xmlpublisher>
- A BI Publisher developer's diary: <http://blogs.oracle.com/BIDeveloper/>
- Oracle BI Publisher Consulting: <http://bipconsulting.blogspot.com/>
- BI Publisher Blog - Ike Wiggins: <http://bipublisher.blogspot.com/>
- In Depth Apps - eBusiness Suite - Gareth Roberts: <http://garethroberts.blogspot.com/>
- The Lowe Down – <http://www.thelowedownblog.com>



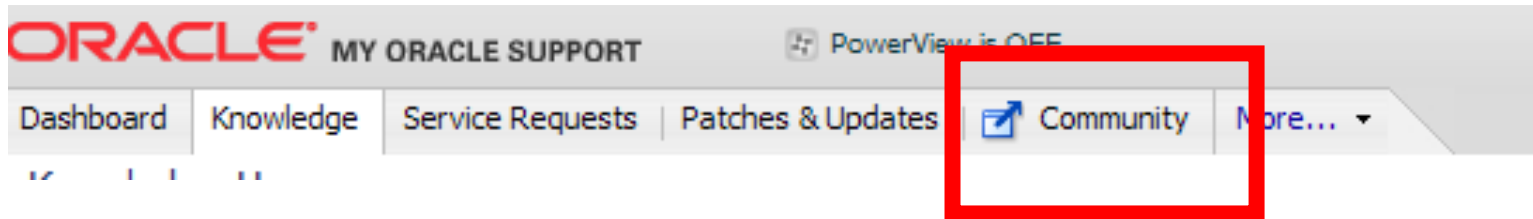
Help! Oracle Forums

<http://forums.oracle.com/forums/forum.jspa?forumID=245>

How to Get Help on Forums:

- a. Search First, Ask Second
- b. Be someone (not user8840234)
- c. Be Specific
- d. Reward others for their assistance
- e. It is better to give than receive

Help! – Oracle Community



- Oracle E-Business Suite -> BI Publisher

Forums

Community Contributed Resource Documents

examples: Troubleshooting Oracle BI Publisher

How To Install a Font Using XMLP Admin

Open an official SR

- Get to the Latest Version of BIP for EBS
- Know Oracle's Published Best Practices
- Utilize the Correct Tools for your version of BIP
- Know what BIP is Capable of Within Different Applications
- Understand How To Troubleshoot
- Know When To Ask For Help and How and Where to Ask For it

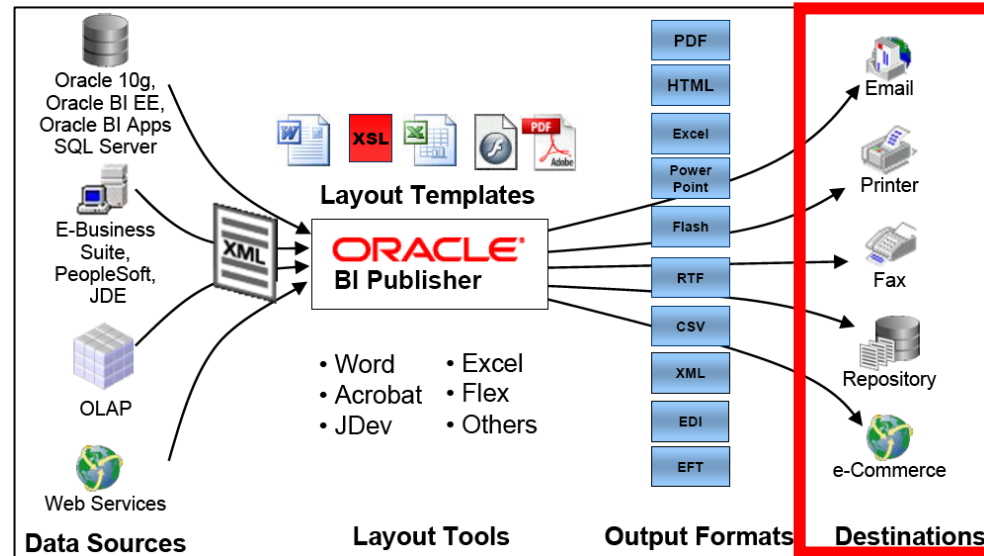


BI Publisher and Document Delivery

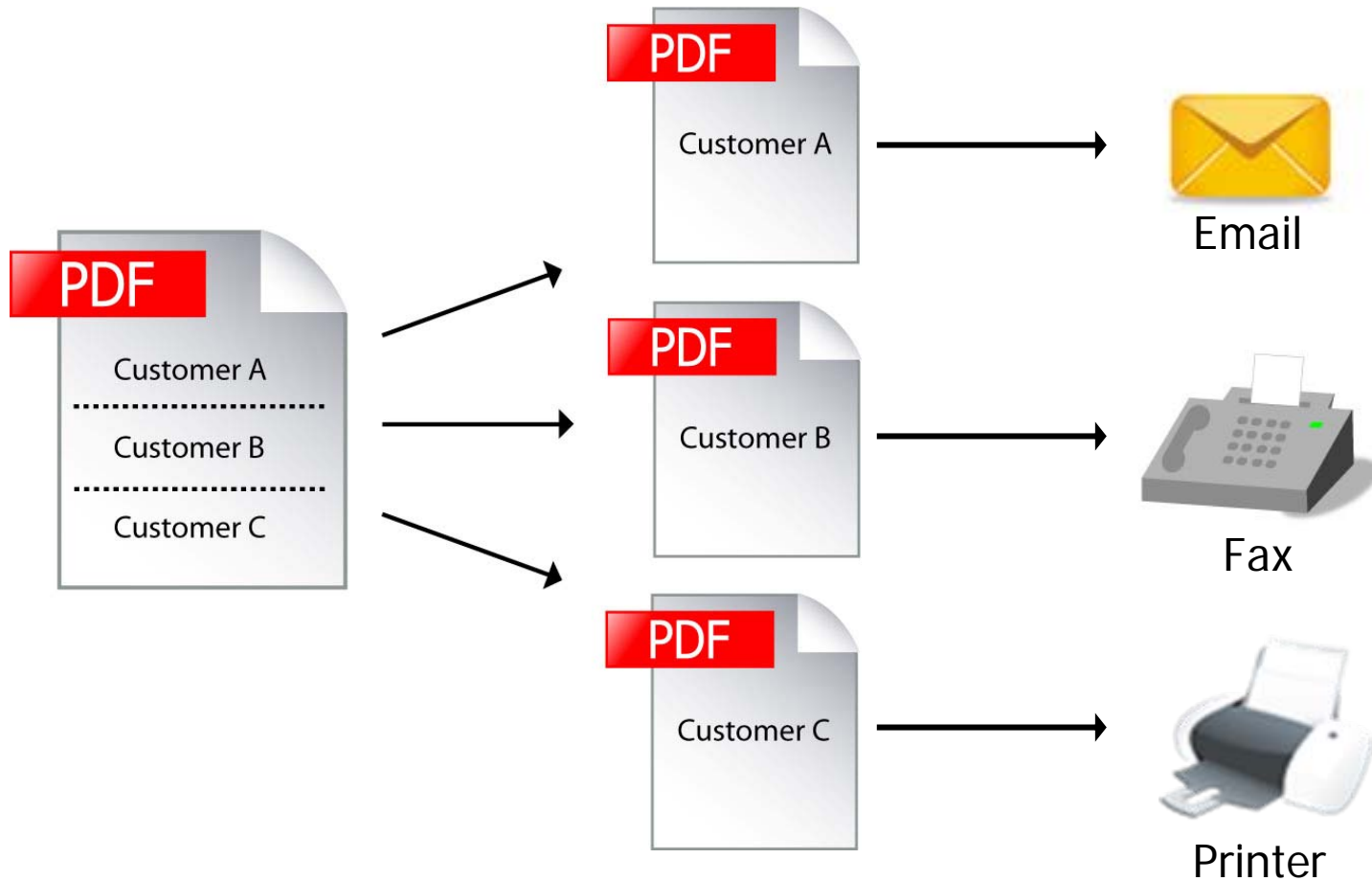
Understand Your Delivery Options

Understand Your Delivery Options

- Delivery Manager exposed via 4 methods:
 - Bursting Control Files
 - 12.1 RUP3
 - Individual applications doing their own thing
 - Java APIs



Delivery Options – Bursting Control Files



- A bursting control file is an XML based file that defines the answers to 4 main questions:
 1. How do I burst the document?
 2. How do I deliver the burst file?
 3. Where do I deliver the burst file?
 4. What should the delivered file look like?



Delivery Options - Bursting Control File

```
<?xml version="1.0" encoding="UTF-8" ?>
- <xapi:requestset xmlns:xapi="http://xmlns.oracle.com/oxp/xapi">
- <xapi:request select="/RAXINV/LIST_G_ORDER_BY/G_ORDER_BY/LIST_G_INVOICE/G_INVOICE">
- <xapi:delivery>
- <xapi:email server="mail.strsoftware.com" port="25" from="qa@strsoftware.com" reply-to="qa@strsoftware.com">
  <xapi:message id="email1" to="brent.lowe@strsoftware.com" cc="" content-type="text/html" attachment="true" subject="Invoice #${TRX_NUMBER}">Dear
  Sir/Madam, Please find the attached invoice #${TRX_NUMBER} for ${BILL_CUST_NAME} dated ${TRX_DATE}. <br><br> Regards,<br> STR Software
  Receivables</xapi:message>
</xapi:email>
- <xapi:fax server="ipp://grimlock:631/printers/axtkocupsprinter">
  <xapi:number id="fax1">${BILL_ADDRESS4}</xapi:number>
</xapi:fax>
</xapi:delivery>
- <xapi:document key="${BILL_CUST_NAME}" output="Invoice_#${TRX_NUMBER}.pdf" output-type="pdf" delivery="email1">
  <xapi:template type="rtf" location="xdo://AR.COPY_RAXINV_SELB.en.US/?getSource=true" filter="./G_INVOICE[BILL_ADDRESS3='EMAIL']" />
</xapi:document>
- <xapi:document key="${BILL_CUST_NAME}" output="Fax_Invoice_#${TRX_NUMBER}.pdf" output-type="pdf" delivery="fax1">
  <xapi:template type="rtf" location="xdo://AR.COPY_RAXINV_SELB.en.US/?getSource=true" filter="./G_INVOICE[BILL_ADDRESS3='FAX']" />
</xapi:document>
</xapi:request>
</xapi:requestset>
```

How to burst the document?

How to deliver the burst file?

Where to deliver the burst file?

What should the delivered file look like?



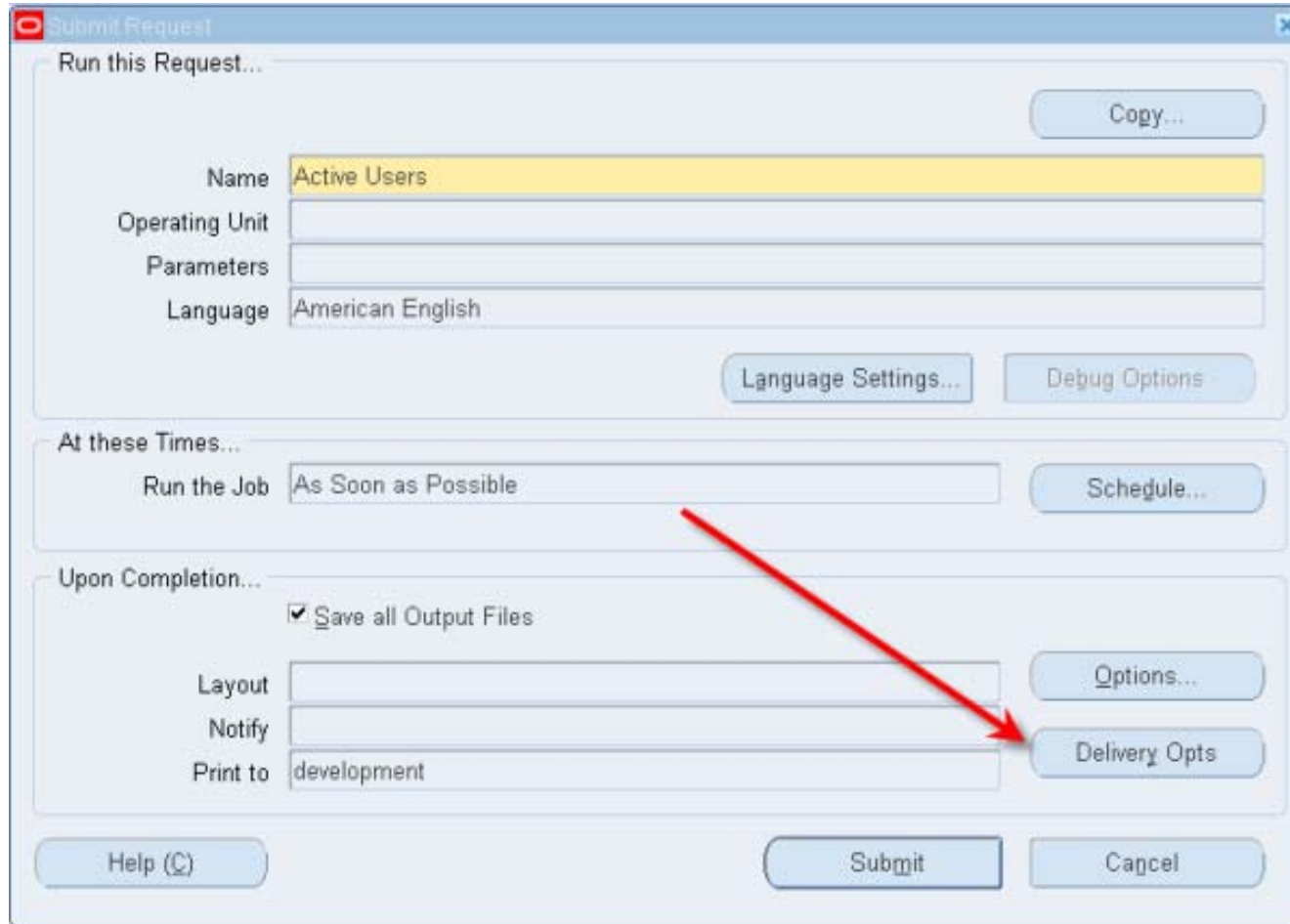
Invoke Bursting

- 2 Step Process

Step 1: Run Concurrent Request to Generate Data.

Step 2: Run 'XML Publisher Report Bursting Program'

Delivery Options – 12.1 RUP3



Submit Request

Run this Request...

Copy...

Name: Active Users

Operating Unit:

Parameters:

Language: American English

Language Settings... Debug Options

At these Times...

Run the Job: As Soon as Possible

Schedule...

Upon Completion...

Save all Output Files

Layout:

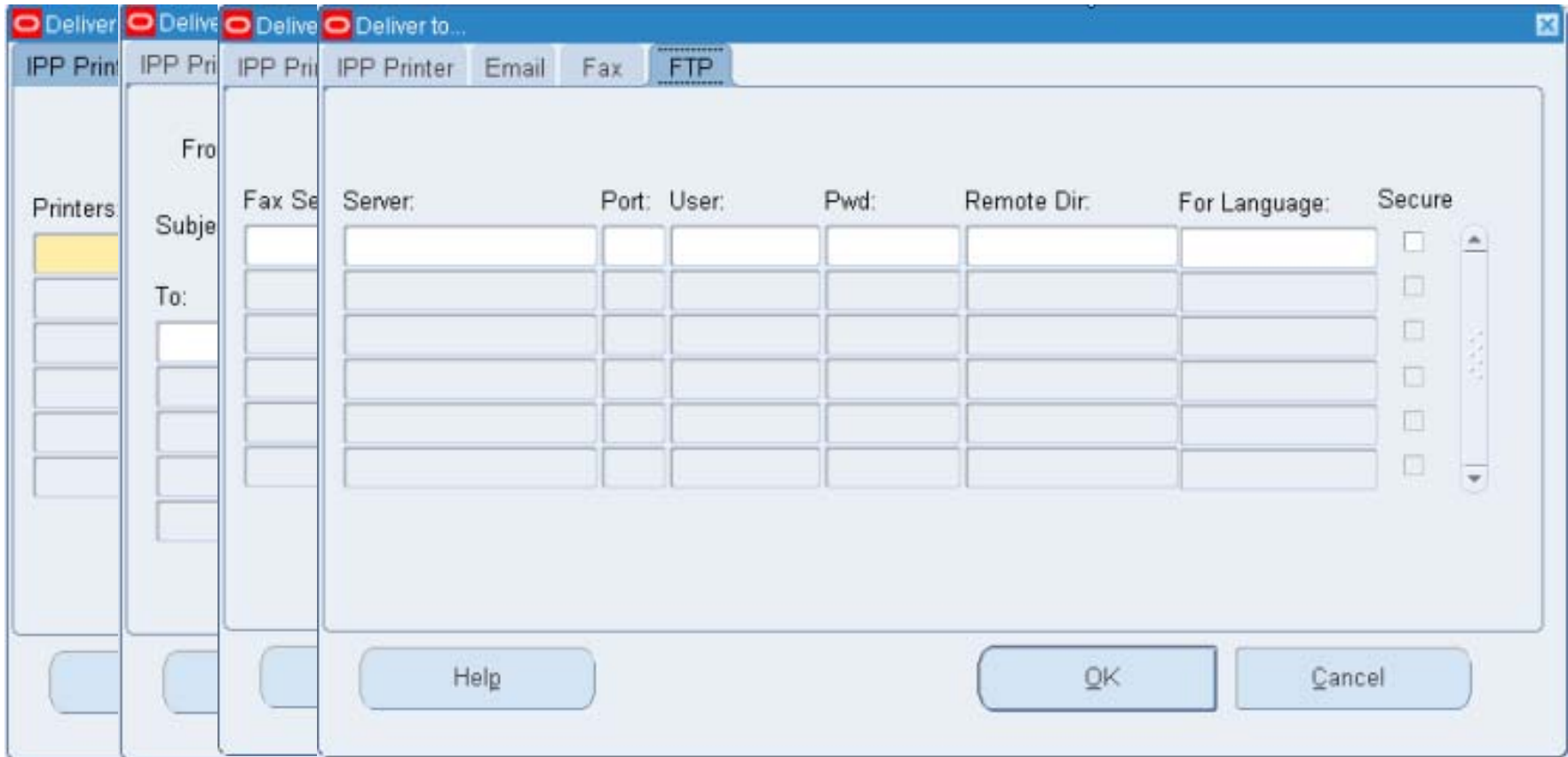
Notify:

Print to: development

Options... Delivery Opts

Help (C) Submit Cancel

Delivery Options 12.1 RUP3





Delivery Options – Java APIs

- Java based APIs available to deliver via:
 - Fax
 - Email
 - Print
 - FTP
 - WebDAV
 - HTTP
- Requirements:
 - Java Developer
 - Document to deliver
 - Recipient information



Delivery Options - Functionality

- Print
 - Utilizes IPP/CUPS to communicate with Printers
 - Different than current printing 'scheme' native to EBS
 - Ensure that printers can handle output data or 'filter' first

- Email
 - Utilizes standard SMTP protocol
 - Set To, CC, BCC, Subject, Attachment Name, Email Message Body, From information
 - 1 Attachment (the BIP data file)

- Fax
 - Utilizes IPP to communicate with 3rd party software/hardware to transmit data.
 - Oracle Recommends freeware FAX4CUPS and efax software to control Fax Modems
 - Set Fax Number only
 - 1 Attachment (the BIP data file)



Delivery Options - Status

What happened to my document?

Email – Rely on bounce backs

Fax – Status determined based on print job, not final outcome of fax

Print – On the printer!



AventX Oracle Connector by STR Software

- Any version from 10.7 through R12.1
- Any output from Oracle Reports and BI Publisher
- Looks like it was written by Oracle themselves

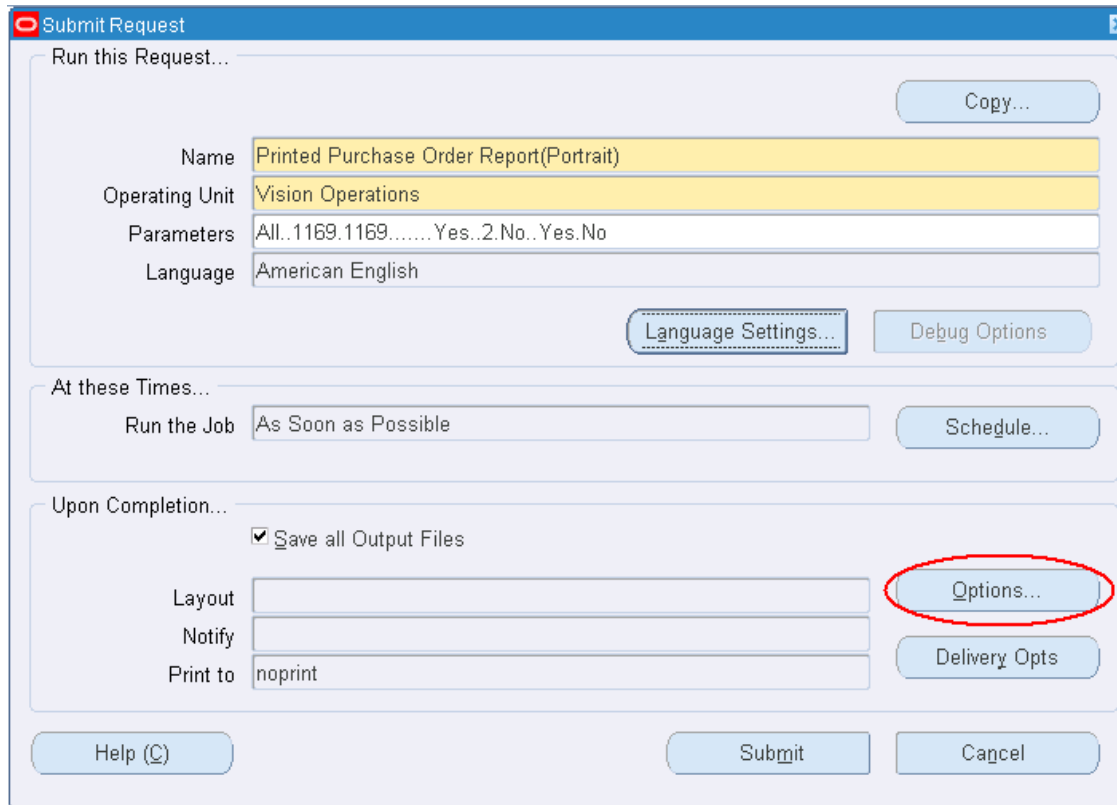


AventX Oracle Connector

- Document Submission
 - Interactive Delivery
 - Automatic Delivery
 - BI Publisher Delivery Manager
 - Printing Attachments
 - Application Program Interface (API)
- Document Transmission
- Document Management and Confirmation
 - Delivery Status
 - Secure and Confirmed Email

AOC Submission: Interactive Delivery

- Deliver ANY document to ANY destination using Submit Request



The screenshot shows a 'Submit Request' dialog box with the following fields and buttons:

- Run this Request...**
 - Name: Printed Purchase Order Report(Portrait)
 - Operating Unit: Vision Operations
 - Parameters: All..1169.1169..... Yes..2.No.. Yes.No
 - Language: American English
 - Buttons: Copy..., Language Settings..., Debug Options
- At these Times...**
 - Run the Job: As Soon as Possible
 - Button: Schedule...
- Upon Completion...**
 - Save all Output Files
 - Layout: [empty]
 - Notify: [empty]
 - Print to: noprint
 - Buttons: Options... (circled in red), Delivery Opts
- Bottom buttons: Help (C), Submit, Cancel



AOC Submission: Interactive Delivery

- Common submission interface for ANY Oracle report

NON-PROD (1) - AventX(tm) Interactive Delivery

Subject:

Options

- Terms and Conditions
- Hold
- XML Archive Connection

Recipients Acknowledgements Cover Page

Pick list from
Vendors

<input type="checkbox"/>	Delivery Address	Name	Company	Printer
<input type="checkbox"/>	joe.smith@bigcorp.com	Joe Smith	Big Corporation	
<input type="checkbox"/>	804-897-1638	Tina Soles	STR Software	
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

Cancel Submit



AOC Submission: Interactive Delivery

NON-PROD (1) - AventX(tm) Interactive Delivery

Subject:

Options

- Terms and Conditions
- Hold
- XML Archive Connection

Recipients Acknowledgements Cover Page

Email	Name
<input type="text" value="pstock@vision.com"/>	<input type="text" value="Pat Stock"/>
<input type="text" value="jbond@vision.com"/>	<input type="text" value="Jim Bond"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>



AOC Submission: Interactive Delivery

NON-PROD (1) - AventX(tm) Interactive Delivery

Subject:

Options

- Terms and Conditions
- Hold
- XML Archive Connection

Recipients Acknowledgements **Cover Page**

Name:

Remarks:



AOC Submission: Automatic Delivery

Automatic | Batch

Submit Request

Run this Request...

Name: Printed Purchase Order Report(Portrait) Copy...

Operating Unit: Vision Operations

Parameters: All. 1169.1171 Yes..2.No..Yes.No

Language: American English Language Settings... Debug Options

At these Times...

Run the Job: As Soon as Possible Schedule...

Upon Completion...

Save all Output Files

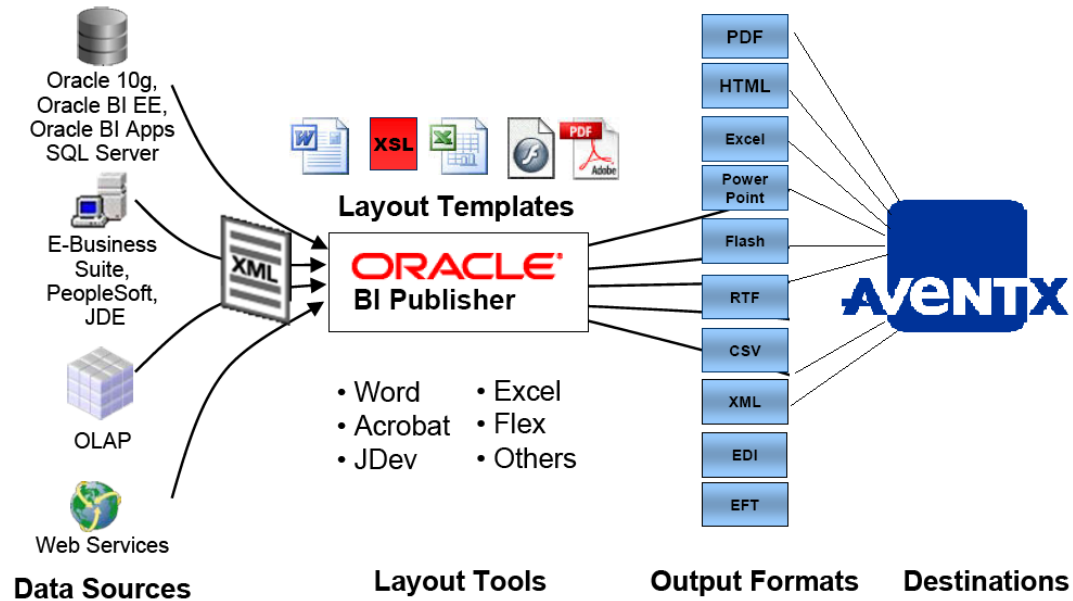
Layout: Options...

Notify: Delivery Opts

Print to: AventX Automatic Delivery Opts

Help (C) Submit Cancel

- Bursting Control Files
- 12.1.3 Functionality
- Individual Applications





AOC Submission: Attachments

Purchase Orders - 6062

Operating Unit: Vision Operations Created: 07-OCT-2010 02:16:08

PO, Rev: 6062 0 Type: Standard Purchase Order P-Card: []

Supplier: STR Software Site: RICHMOND Contact: Soles, Tina

Ship: []

Buyer: []

Description: []

Attachments - 2, ,

Main Source

Seq	Category	Data Type	File or URL
10	To Supplier	File	Monitor_Specs.doc
20	To Buyer	File	HighDef.pdf
10	Miscellaneous	File	Shipping Instructions.doc

Entity Name: PO Line

Open Document...

Num: 1, 2

Item: Include Related Documents

Publish to Catalog Document Catalog... Approve...

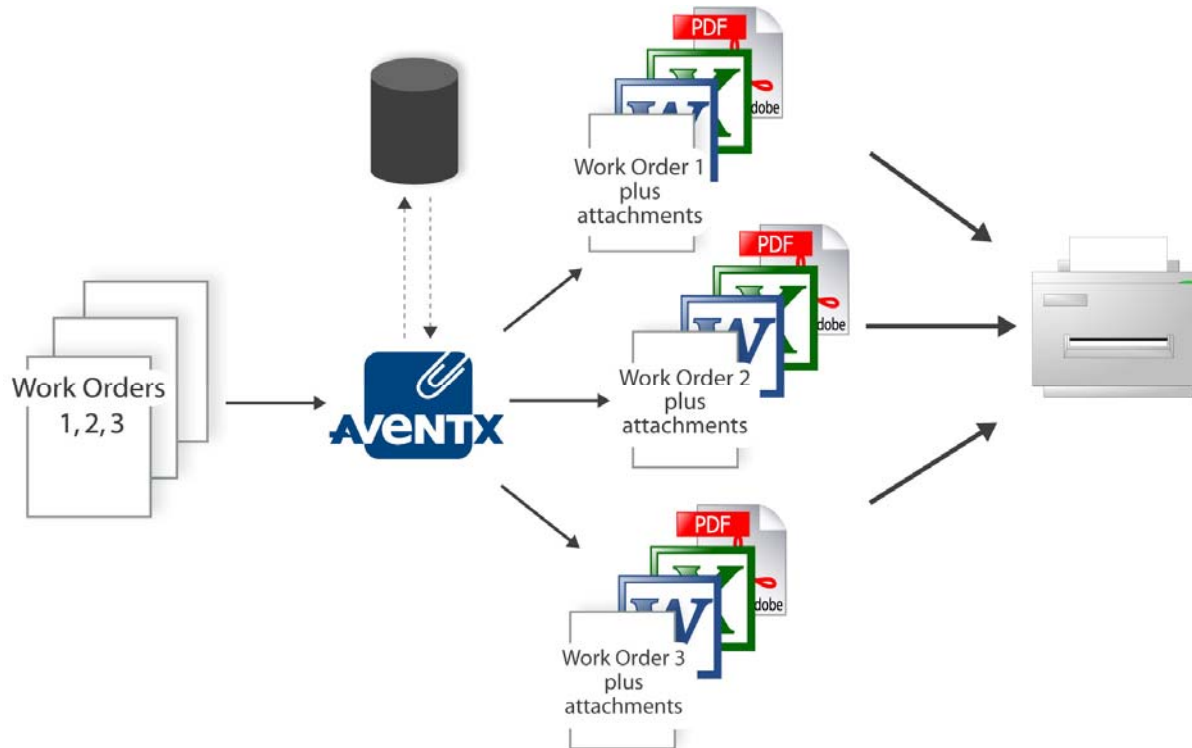


Printing Oracle Database Attachments

- Significant need to automate printing
- Hours being spent per week printing attachments from invoices, purchase orders, work orders, etc.

AVENTX Printing Oracle Database Attachments

- 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



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

- Email
 - Native SMTP email
 - Secure/Confirmed Email
- Fax
 - Network Fax Servers
 - Hosted Fax Servers
 - FOIP
- Print
 - Print to network printers

Controlled by a Scheduler

- Manages queue
- Manages error conditions
- Manages retries, rescheduling, sending at specific times, routing to specific devices, etc...



AOC Acknowledgement: Native Oracle Forms

NON-PROD (1) - AventX(tm) Delivery Status: Request ID 5880561

Fax ID	Delivery Address	Doc ID	Subject	Date	Status	Status Message	Host
ARC1	ARCHIVE		Purchase Order #6062	07-OCT-10 02:27 AM	Success	Document successfully deli	wolfmanr12.strs
NBAA0000	brent.low@strsoftware.	6062	Purchase Order #6062	07-OCT-10 02:28 AM	Ready		wolfmanr12.strs
NBAA0001	804-897-6357	6062	Purchase Order #6062	07-OCT-10 02:28 AM	Ready		wolfmanr12.strs
NBAA0002	ben.bruno@strsoftware.	6062	Purchase Order #6062	07-OCT-10 02:28 AM	Ready		wolfmanr12.strs

Display Control
Verbose Sort Results By

NON-PROD (1) - AventX(tm) Delivery Status

Request ID: 5880561 Fax ID: NBAA0000
Login: TSOLES Hostname: wolfmanr12.strsoftw
Subject: Purchase Order #6062

Recipient
Delivery Address: brent.low@strsoftware.com
To: Brent Lowe
Company: STR Software

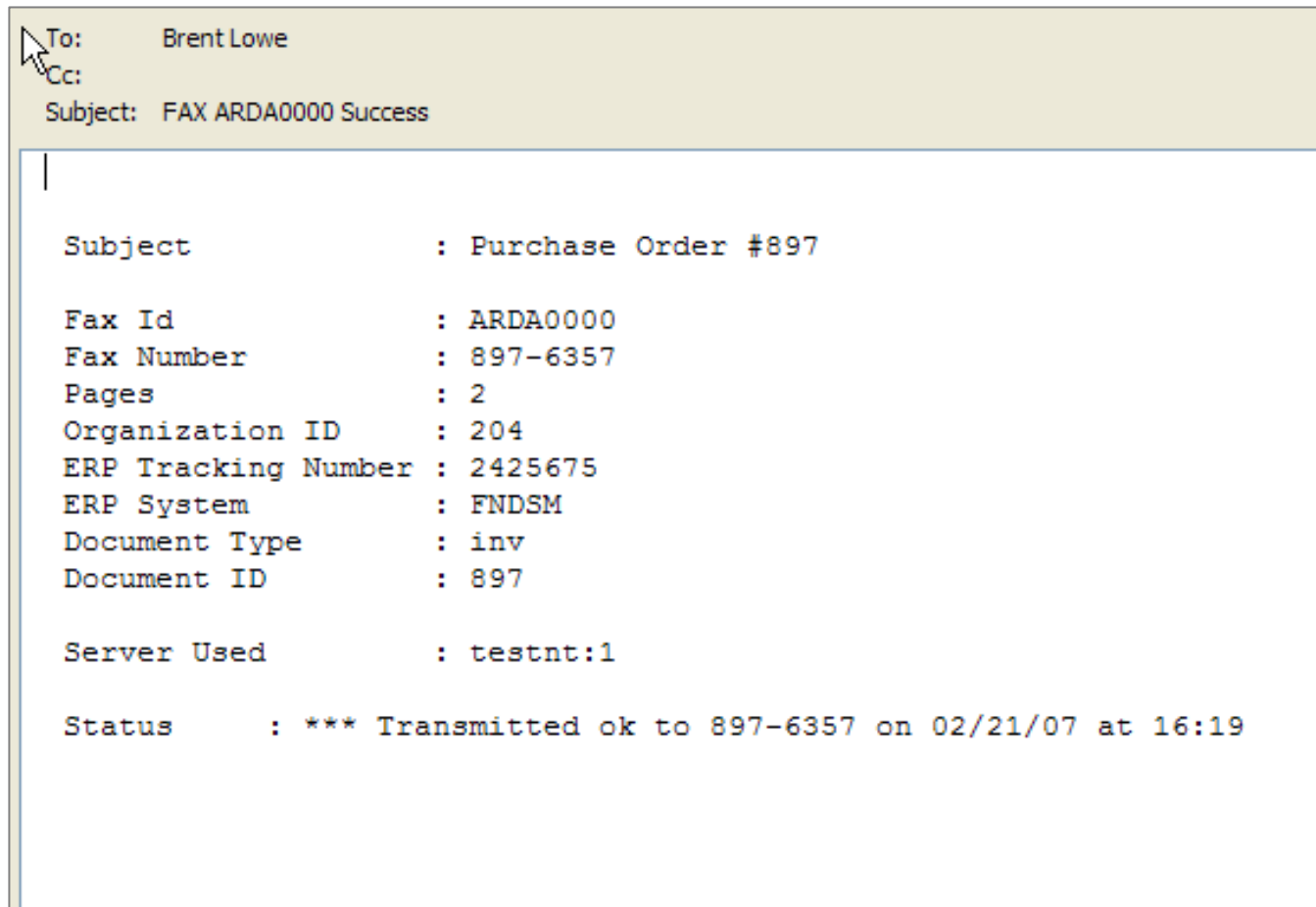
Transmission
Status: Ready
Status Message:
Transmission Date: 07-OCT-10 02:28 AM Pages: 0 of 0

Refresh Data Manage Document Modify Document OK

View Details...



AOC Acknowledgement: Confirmation Emails





AOC: Document Management

Allows user to resend documents that fail or need to be resent from inside of Oracle EBS

NON-PROD (1) - AventX(tm) Delivery Status: Request ID 5880561


Fax ID	Delivery Address	Doc ID	Subject	Date	Status	Status Message	Host
ARC1	ARCHIVE		Purchase Order #6062	07-OCT-10 02:27 AM	Success	Document successfully deli	wolfmanr12.strs
NBAA0000	brent.lowe@strsoftware.	6062	Purchase Order #6062	07-OCT-10 02:28 AM	Ready		wolfmanr12.strs
NBAA0001	804-897-6357	6062	Purchase Order #6062	07-OCT-10 02:28 AM	Ready		wolfmanr12.strs
NBAA0002	ben.bruno@strsoftware.	6062	Purchase Order #6062	07-OCT-10 02:28 AM	Ready		wolfmanr12.strs

Display Control
Verbose Sort Results By Ascending Descending













AOC: Document Management



AventX Document Management - Windows Internet Explorer provided by STR Software



Owner: TSOLES
 System: WolfmanR12-faxmgr
 System Status: ● Active
 Queued Documents: 43 (43)
 Successful Documents: 1
 Unsuccessful Documents: 3

Query...          

Displaying Query: Custom Query
Results 1 to 3 of 3

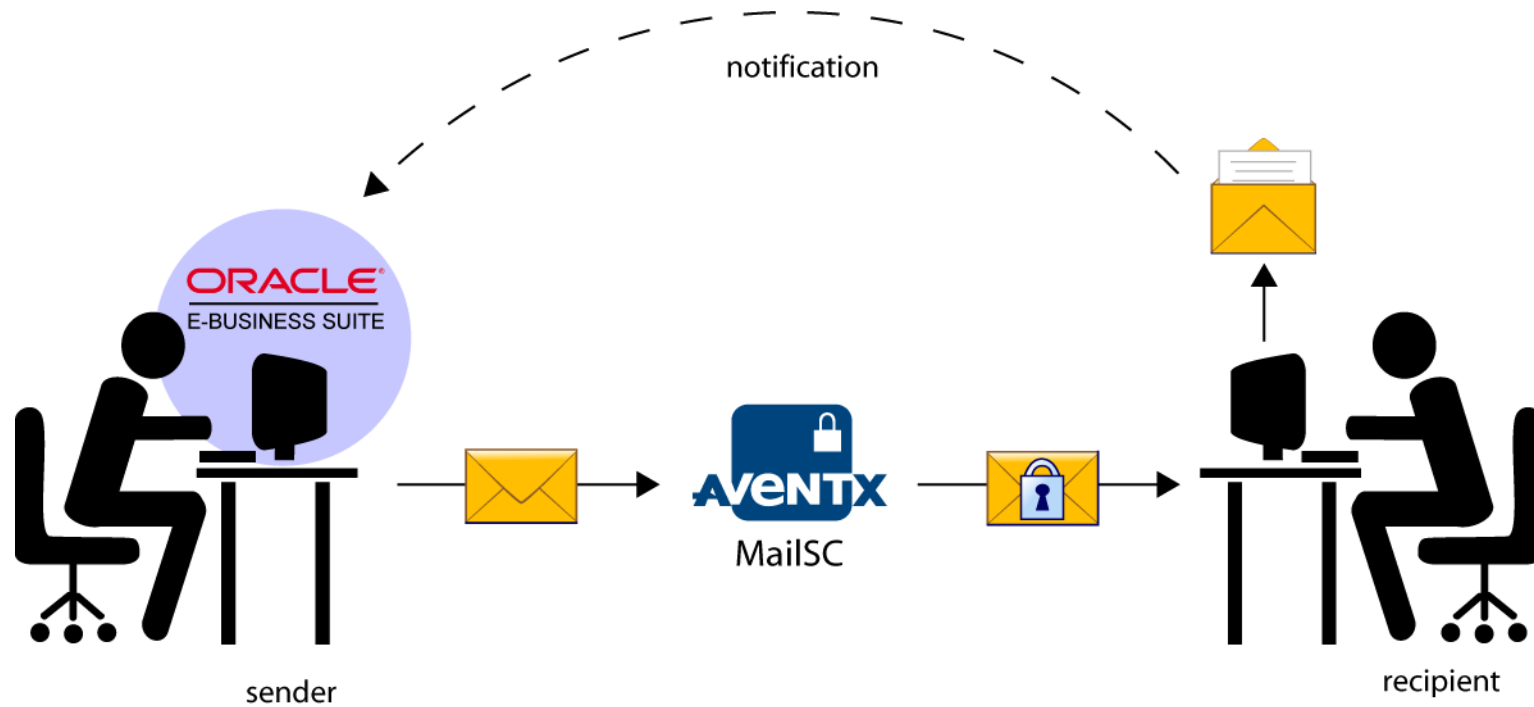
Fax & Email Transmissions								Auto-Refresh: <input type="button" value="Off"/>
Printable Version Run statistics on active query Modify column selection								
<input type="checkbox"/>	Fax ID	Status	Date and Time	Delivery Address	Subject	Pages	Device	
<input type="checkbox"/>	 NBAA0001	Ready	10/07/2010 02:28 AM	804-897-6357	Purchase Order #6062	0 of ?	ANY	
<input type="checkbox"/>	 NBAA0000	Ready	10/07/2010 02:28 AM	brent.lowe@strsoftware.com	Purchase Order #6062	0 of ?	ANY	
<input type="checkbox"/>	 NBAA0002	Ready	10/07/2010 02:28 AM	ben.bruno@strsoftware.com	Purchase Order #6062	0 of ?	ANY	

Last Downloaded: October 7, 2010 8:04:27

Displaying Query: Custom Query
Results 1 to 3 of 3



AVENTX Secure, Confirmed Delivery





Secure, Confirmed Delivery

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

NON-PROD (1) - AventX(tm) Interactive Delivery

Subject:

Options

- Terms and Conditions
- Hold
- XML Archive Connection

Recipients | Acknowledgements | Cover Page

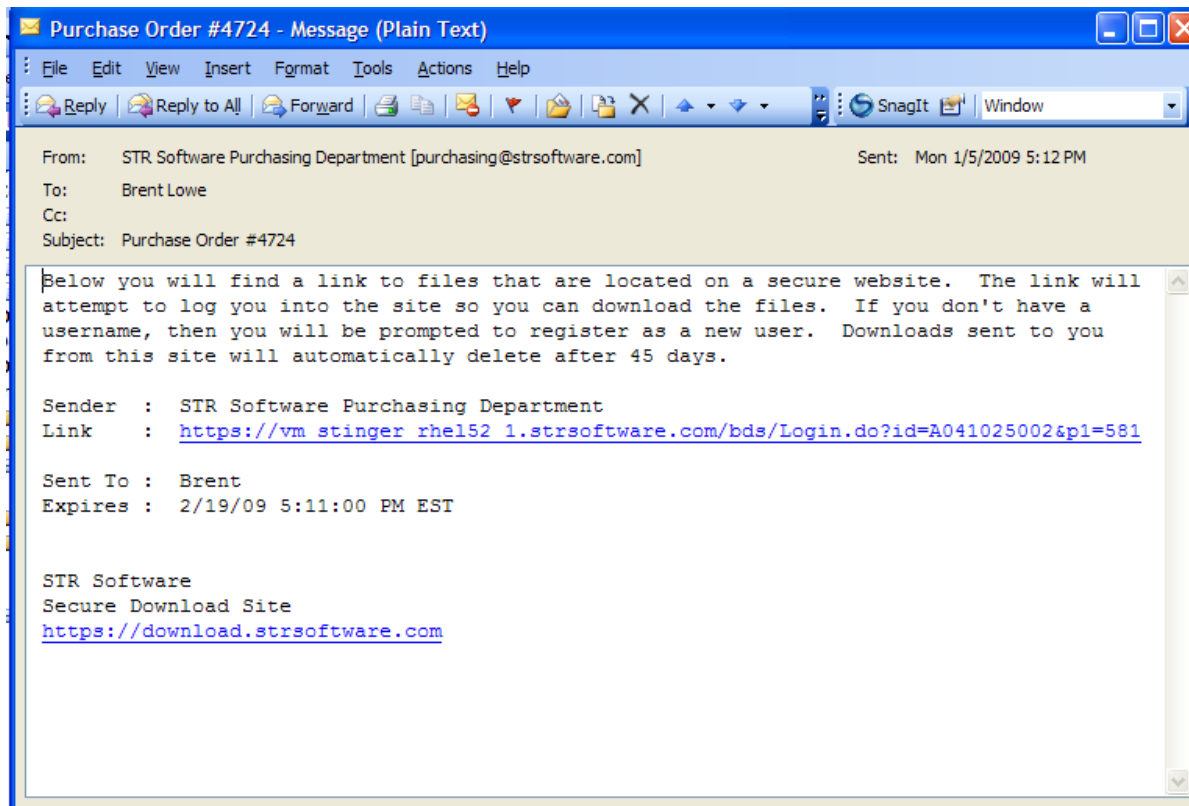
Pick list from

<input type="checkbox"/>	Delivery Address	Name	Company	Printer
<input checked="" type="checkbox"/>	brent.low@strsoftware.com	Brent Lowe	STR Software	
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				



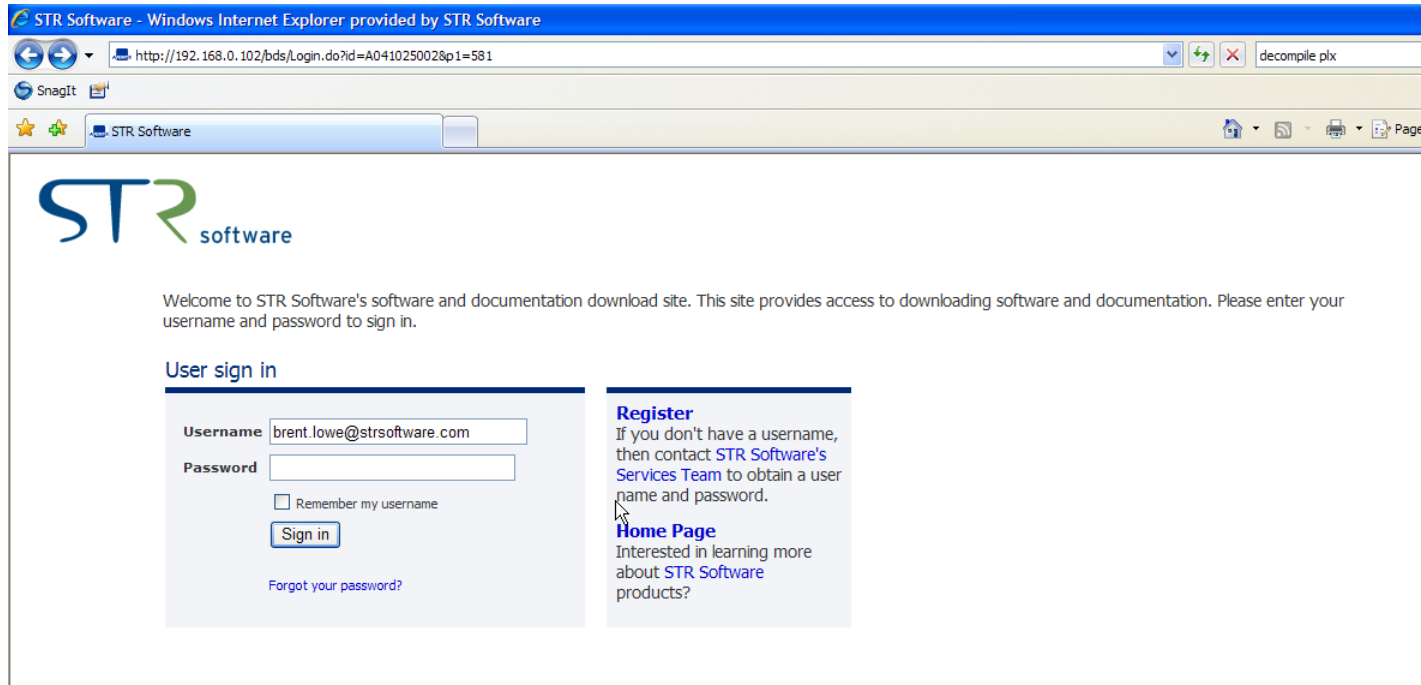
Secure, Confirmed Delivery

- 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.

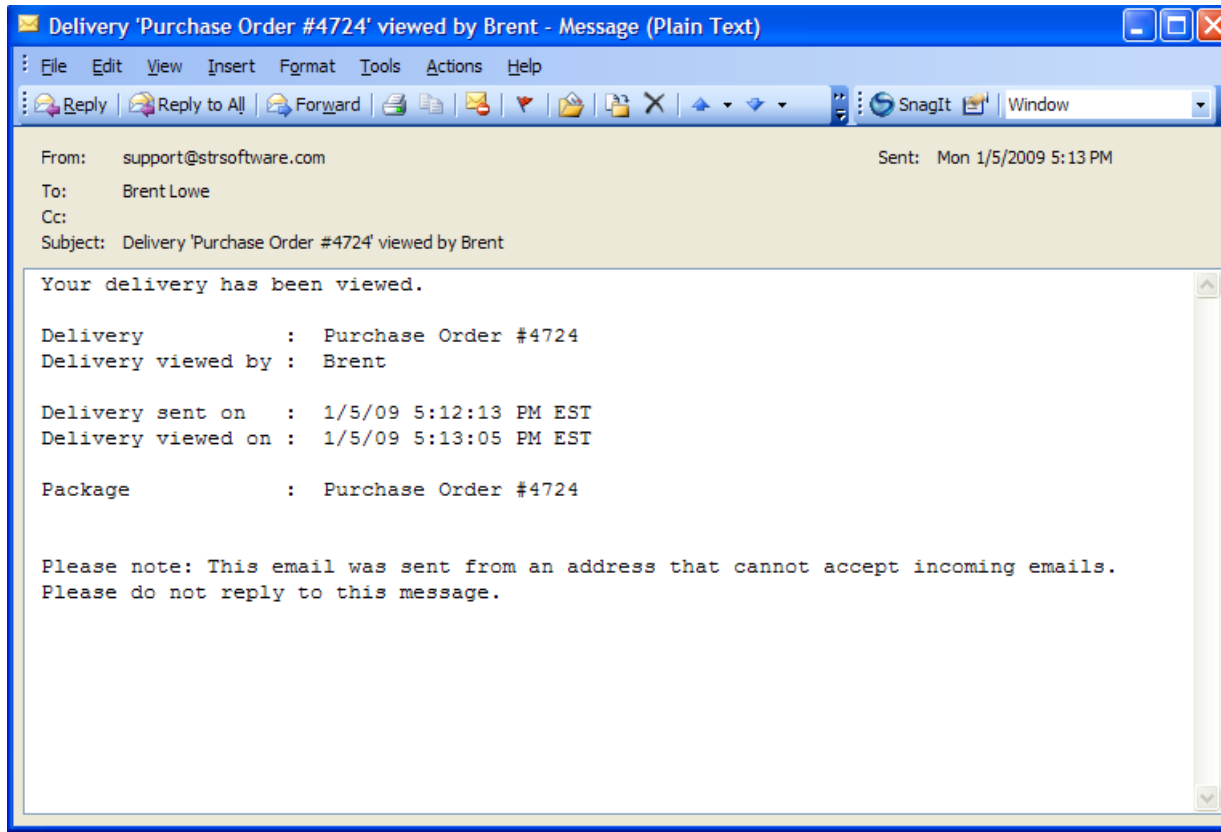
File name	Description	Date Created	Size
 Purchase_Order_#4724.pdf		01/05/2009 05:12 PM	113.6 KB
 signed_agreements.doc		01/05/2009 05:12 PM	23.5 KB
 Time_Sheet.xls		01/05/2009 05:12 PM	16.4 MB
 Original Proposal.pdf		01/05/2009 05:12 PM	95.4 KB

Show/Hide Reply Section



Secure, Confirmed Delivery

- Once viewed, original sender will receive confirmation





Extend Delivery Functionality with AventX

- Document Submission
 - Interactive Delivery
 - Automatic Delivery
 - BI Publisher Delivery Manager
 - Printing Attachments
 - Application Program Interface (API)
- Document Transmission
- Document Management and Confirmation
 - Delivery Status
 - Secure and Confirmed Email



Case Study – Mutual Materials

- Company Profile
- Our Former Process
- Search for an automated solution
- Requirements
- Successes
- Future Plans





Guy DeFlorio – A bit about me

- 30+ years IT, last 9 at Mutual Materials
- Oracle, UNIX database and E-business, Manufacturing systems development
- Manage small (but mighty) staff
- IT as partners to the business





AVENTIX Company Profile

- Mutual Materials – Serves Pacific Northwest, Western Canada
- Oracle EBS since 2000
- Oracle Apps - E-Business Suite 11.5.10 on Red Hat Linux
 - Implemented Financials
- Production and Non-Production Environments
- IT Staff of 9
 - CTO, Business Application Manager, Business Analyst, System Administrator, Oracle Developer and BI Publisher Administrator, Help Desk
- Application Users
 - 150 Business Users (Core Apps)
 - 50 Self Service Users





Our Former Process

- As mandated by the CEO in May 2009, the IT team sought ways to implement business solutions that would produce a positive ROI by year-end 2009.
- Evaluated manual printing and postal mailing of Oracle EBS generated invoices. Goal was search for a greener, less resource intensive document delivery solution.
- Fax and email required integration with BI Publisher
- Preferred user control and confirmation of delivery



Search For An Automated Solution

- Evaluated proprietary solution using customer programming tools with BI Publisher API. Considered other third-party solutions.
- Preferred fully supported “out of the box” solution
- Oracle SC recommended AventX on Jul 20th, 2009
- Attended AventX webcast, reviewed proposal & signed license and support contracts
- Issued purchase order on Jul 31st, 2009
- Onsite implementation week of Aug 24th, 2009
- Production use on Sep 1st, 2009



AVENTIX Requirements

- Users should be able to print, fax or email documents directly out of Oracle Application screens
 - Invoices
 - Packing Slips
 - Purchase Orders
 - Sales Order Acknowledgements
 - Sales Quotations
- Specified attachments could be delivered along with corresponding document
- Compatible with our newly implemented XML document formats

- Jenni Laughlin, Business Applications Manager:
 - “The procurement process was easy. The AventX Oracle Connector more than met our business requirements and our STR Software Sales Consultant was prompt, accurate and knowledgeable in all communications.”
 - “While our initial business requirement was to automate fax and email delivery of invoices, the product flexibility made it a no-brainer to automate delivery of other documents like purchase orders, sales order acknowledgements and sales quotes.”
- Guy DeFlorio, CIO:
 - “We achieved our ROI in less than 4 months; We are greener too!”
- 300 outbound pages per day with 70% via email delivery



AVENTX Future Plans

- Have already deployed solution for invoices to Canadian Operating units
- Investigating sending customer statements via fax / email
- Opt in vs. Opt out process for customers
- Extra benefit is use of email for promotional marketing efforts



AventX Case Study - MARTA

- Company Profile
- Our Former Process
- STR Software AventX Implementation Experience
- Benefits Realized
- Challenges and Issues
- Future Plans

- 14+ years of experience implementing, customizing & upgrading Oracle EBS (11.0.3, 11.5.10 & R12.0.4) Financials / HCM / SCM & Oracle BI Applications
 - Enterprise Resource Planning (ERP)
 - Enterprise Application Integration (EAI)
 - SOX Compliance
 - Product Development using
 - Fusion Middleware
 - Data Conversions
 - Data Security
 - Instance Modeling



AVENTIX Company Profile

- MARTA – Serving the Metro Atlanta area for 30 years
- MARTA – Plays a major role in the growth and development of the city of Atlanta
- Oracle Apps - E-Business Suite 11.5.10 CU2 as part of the Business Transformation Program
 - Implemented all Financials, Inventory, Order Management, Projects / Grants, HR, Payroll and iProcurement
- Development, Test, and Production Environments
- IT Staff of 7
 - Director, Manager, 5 Application Developers
- Application Users
 - 100 Business Users (Core Apps)
 - 500 Self Service Users



Our Former Process

- Used Optio Software for automatic delivery of Business Documents via print, fax or email
- Optio was very rigid in terms of flexibility. For example, the users wanted to print document to different printers and we were unable to configure it. We had to customize the Oracle Report and also make changes on the Optio Designer.
- No user confirmation of delivery in Oracle Applications
- Unable to fax attachments



Search For An Automated Solution

- Sought integration and support of BI Publisher as it was unavailable with Optio Software
- Discovery of STR Software's AventX solution using Google for public sector solutions May 29, 2007
- Registered for free webinar after receiving follow-up email from inquiry
 - Organized champions to attend the webinar
- AventX leveraged existing Brooktrout fax board
- Negotiated contract with STR Software
- Purchase order issued October 4, 2007



Requirements

- Users should be able to print, fax or email documents directly out of Oracle Application screens
 - Blank Releases
 - Purchase Orders
 - Request for Quotations
- Specified attachments could be delivered along with corresponding document
- Compatible with our newly implemented XML document formats

- Redesign the layouts using Oracle BI Publisher and produce PDF output
- Customize the PO Approval process to automatically print, fax or email the approved purchase order
- Install and configure pdf2ps utility
- Move to production instance



AventX Successes

- Within hours, AventX was installed, configured and ready to test
- STR Software team was
 - very knowledgeable about the product
 - very proactive and helpful
- New attachment category to automatically send specified attachments
- AventX in production since Aug 2008 and have not seen any issues thus far

- MARTA went live with Oracle A/R invoices using AventX to fax, email and print the week of March 1st

Summary

- The AventX solution is completely configurable to any business process.
- Each Customer and Supplier Site can be configured individually
 - Different Notification Methods
 - Different Fax Numbers
- Additional recipients can be added to receive the document or acknowledgement on the fly using the Interactive Mode.
- Users are able to Fax/Email/Print from within Oracle Apps using the same concurrent request they use to print and manually fax.
 - Users better utilize their time when they are not standing in front of a fax machine.
 - Users do not have to launch an additional program to fax or email the document.
- AventX will send attachments to accompany their corresponding documents.

- Native functionality of Oracle EBS for email and fax is limited to single document purchase orders ONLY
- BIP 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



Automated Document Delivery

AventX Oracle Connector

any document. any format. any volume.

- Email, fax and print from Oracle EBS, including database attachments
- Support for BI Publisher and Document Formatting Solutions
- Flexible Delivery Methods (1-off & batch)
- Real-time delivery status within Oracle EBS



STR Software (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 %



Satisfied Oracle EBS Customers





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- Development
- Oracle EBS
- Other
- Personalization

- March 2010
- February 2010
- January 2010
- December 2009

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