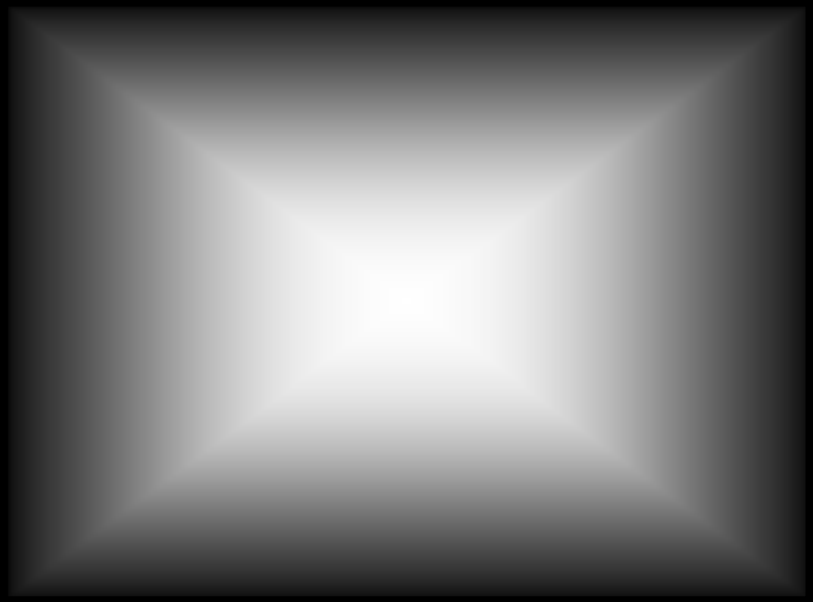
Scan, Attach, Send, Approve

Electronic Document Case Studies

Oracle E-Business Suite



ORACLE Gold Partner

Gareth Roberts, March 2010

Copyright © 2010 Virtuate Limited

VIRTUATE

PS: Please switch off your mobile phone!

$880

Uh oh...

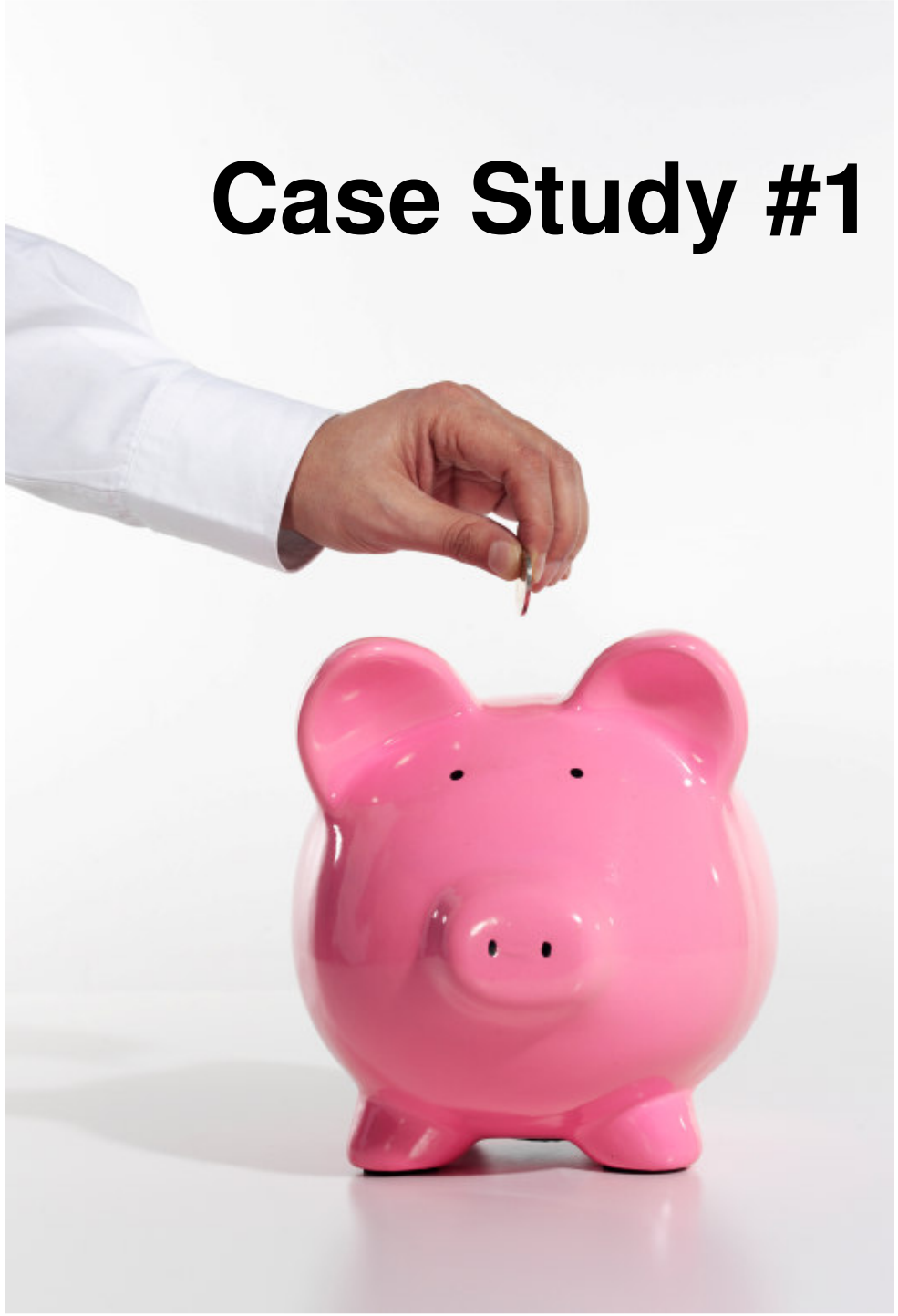
Not an ideal scenario!

Find what you're looking for...

FAST

Case Study #1 Issues

Case Study #1



Goals

Reduce Cost

$10 / invoice

Reduce time to pay by 50%

Case Study #1 Solution

Scan, Attach, Send, Approve

Walkthrough

Receive Centrally

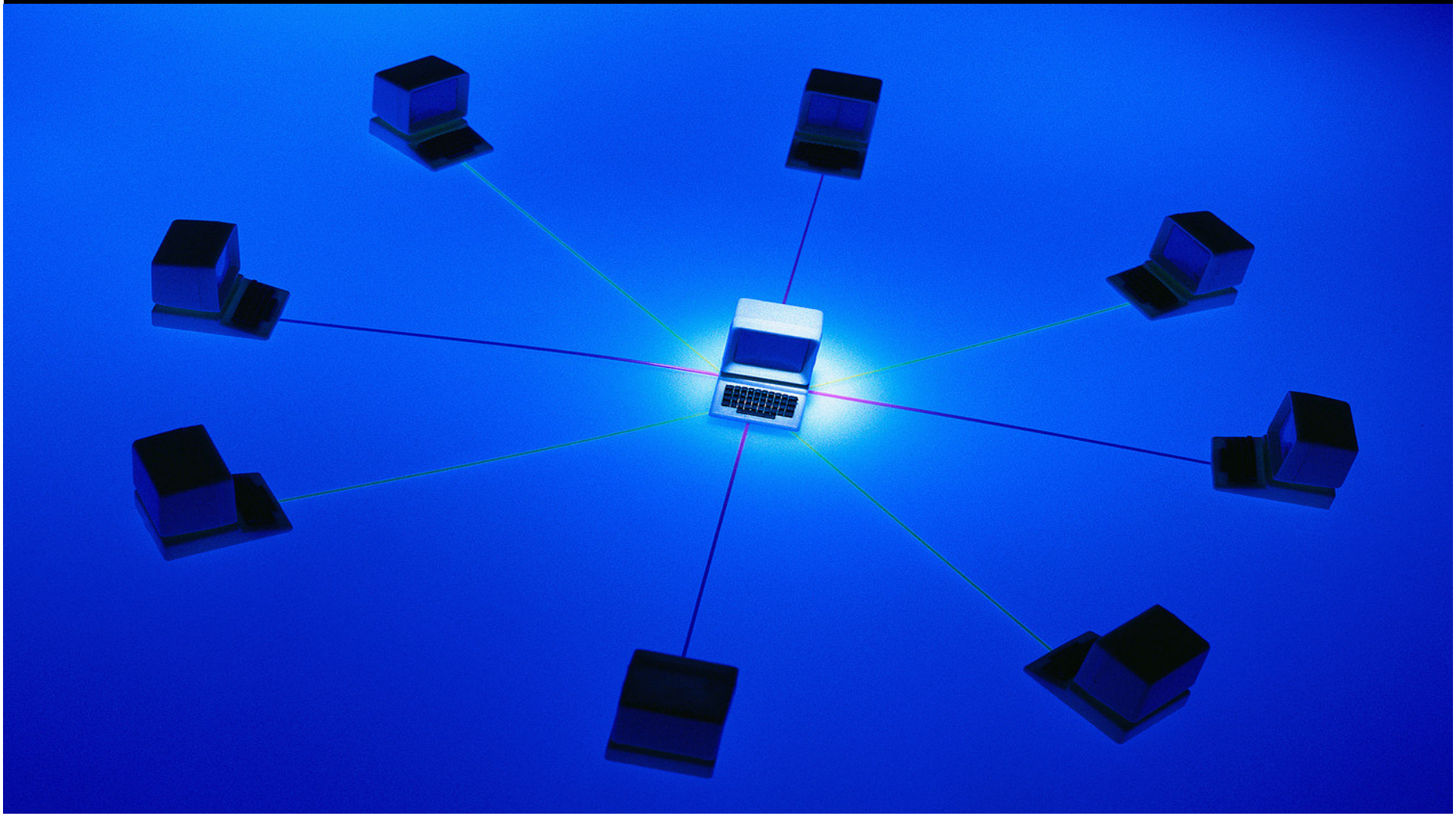
Scan

Data Entry

ScanToEBS

Approve

Receive Invoices Centrally



Walkthrough

Receive Centrally

Scan

Data Entry

ScanToEBS

Approve

SCAN

Transactional Hardcopy Documents

Use existing office scanner

Electronic

Document

=

Hardcopy

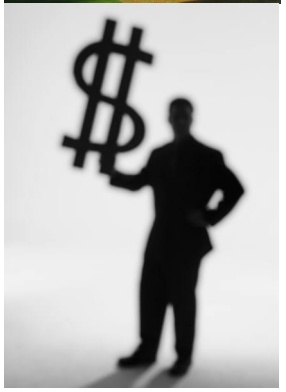
Backup

Common format

SIZE - optimized

Standard locations & names

SAVE



What tool do we use for scanning

SCAN
TO PDF

"Great Product"

Nicholas Slim
Ansell France

"I love your product"

Joyce Shui

Purple School, UK

SCAN TO PDF

Used daily by **thousands** of users

Scan to PDF Clients

Below are listed just some of the companies that use ScanToPDF.
Our client base is truly international with systems installed
in all the continents of the World.

Education

California Institute of Technology - USA
University of Illinois - USA
Cambridge University - UK
University of California - USA
Ghent University - Belgium
Electrical Industry Training Centre - Hong Kong
Akademia Medyczna - Poland
Eaton House Schools - UK
University of Florida - USA
United States Naval Academy Education Unit - USA
Oregon State Education - USA
Ecole Polytechnique Federale De Lausanne - Switzerland

Healthcare

Ansell - Belguim
Gendent - Norway
Morningside NHS - UK
Belfast NHS - UK
Physicians Medical Group of Santa Cruz County - USA
North East Mental Healthcare Centre - Canada
Longwood Urological Associates - USA
Randox - UK
Healthcare Data Systems - USA

Distribution

Nightfreight Limited - UK
Eagle Global Logistics - UK
Westminster Collections - UK
American International Movers - US
Essential Freight - USA
NNR Global Logistics - USA
Canaria Express - USA
ANC Distribution - UK
Jettainer - Germany
Churchill Express - UK

Construction

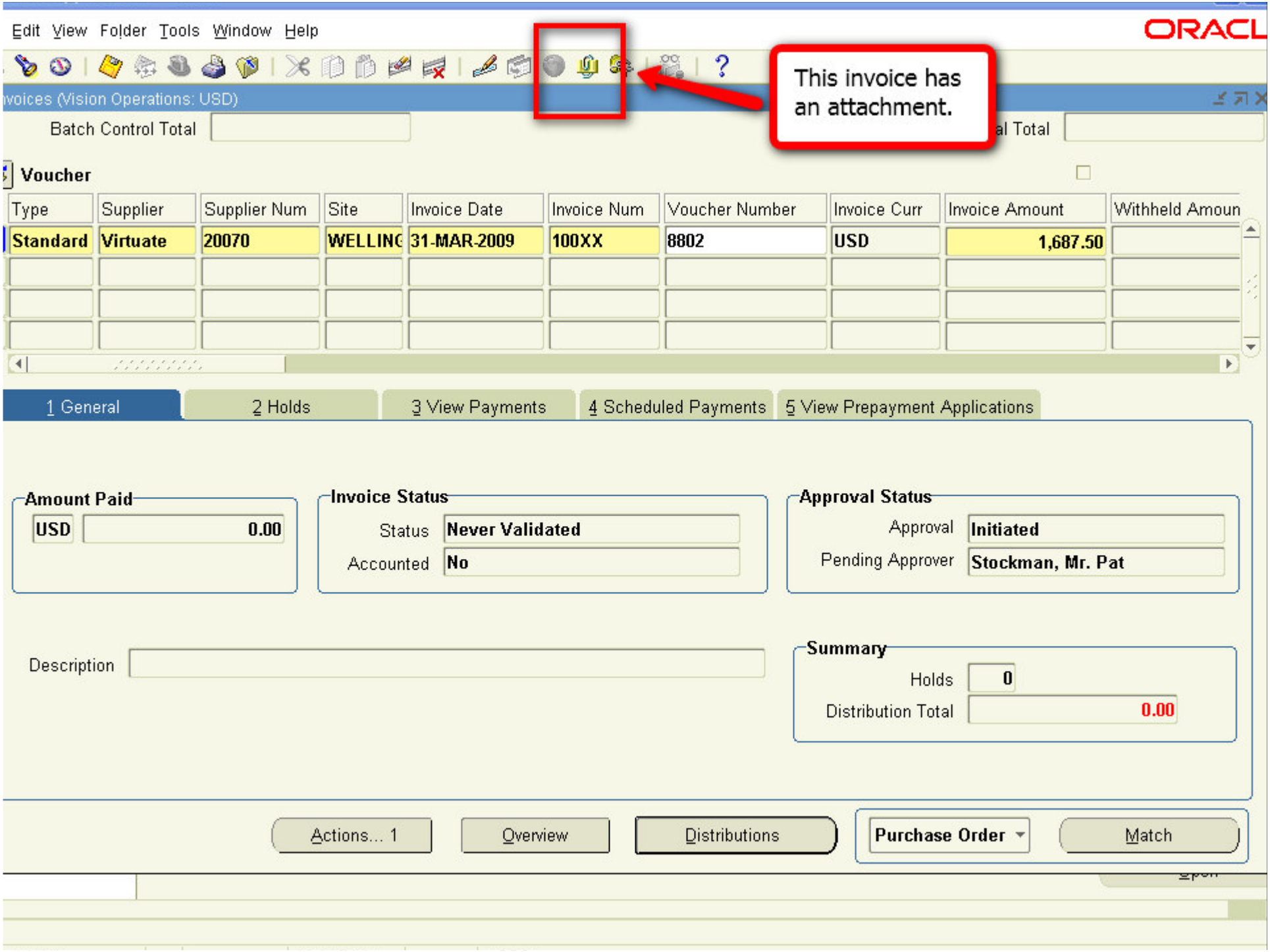
Kier Group - UK
Skyaway Canada - Canada
Ramboll - Denmark
Engineering Council of Great Britain
Sitaf s.p.A. - Italy VS Automatic - De
Etatns - Dubai
Korn Ferry - Hong Kong
Dillard Smith - USA
Farnsworth Group Inc - USA
Gossen Corp - USA
Marathon Heater - USA

Video: Scan To PDF

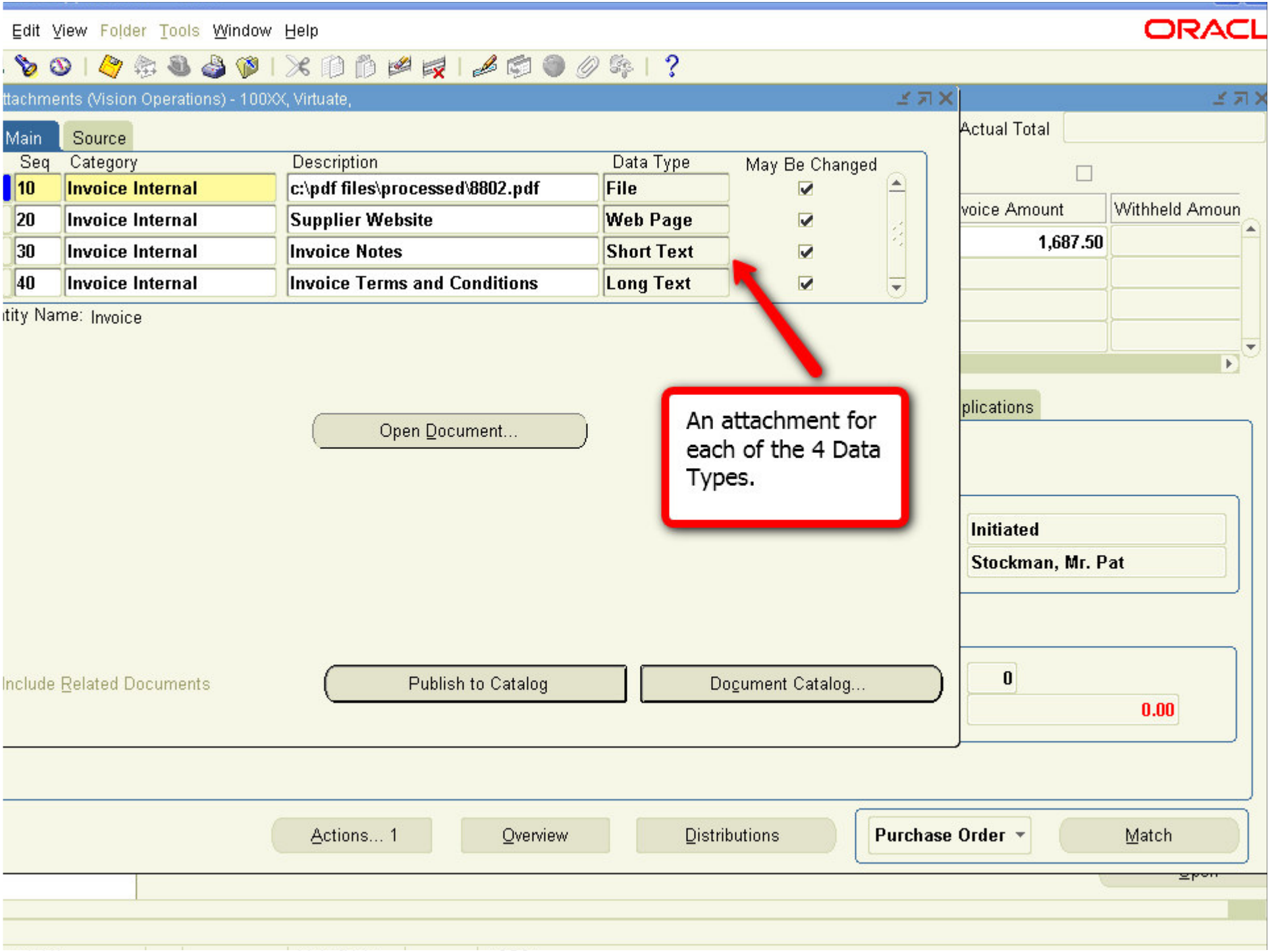
Attach

Oracle E-Business Suite Document Attachments

What is a document attachment?


Edit View Folder Tools Window Help
ORACL
This invoice has an attachment.
voices (Vision Operations: USD)
Batch Control Total
al Total
Voucher
Type
Supplier
Supplier Num
Site
Invoice Date
Invoice Num
Voucher Number
Invoice Curr
Invoice Amount
Withheld Amoun
Standard
Virtuate
20070
WELLING
31-MAR-2009
100XX
8802
USD
1,687.50
1 General
2 Holds
3 View Payments
4 Scheduled Payments
5 View Prepayment Applications
Amount Paid
USD
0.00
Invoice Status
Status
Never Validated
Accounted
No
Approval Status
Approval
Initiated
Pending Approver
Stockman, Mr. Pat
Description
Summary
Holds
0
Distribution Total
0.00
Actions... 1
Overview
Distributions
Purchase Order
Match

What types of attachments are there?


Edit View Folder Tools Window Help
ORACL
ttachments (Vision Operations) - 100XX, Virtuate,
Main
Source
Seq
Category
Description
Data Type
May Be Changed
10
Invoice Internal
c:\pdf files\processed\8802.pdf
File
20
Invoice Internal
Supplier Website
Web Page
30
Invoice Internal
Invoice Notes
Short Text
40
Invoice Internal
Invoice Terms and Conditions
Long Text
tity Name: Invoice
Open Document...
An attachment for each of the 4 Data Types.
Actual Total
voice Amount
Withheld Amoun
1,687.50
plications
Initiated
Stockman, Mr. Pat
0
0.00
Include Related Documents
Publish to Catalog
Document Catalog...
Actions... 1
Overview
Distributions
Purchase Order
Match

Size Limits

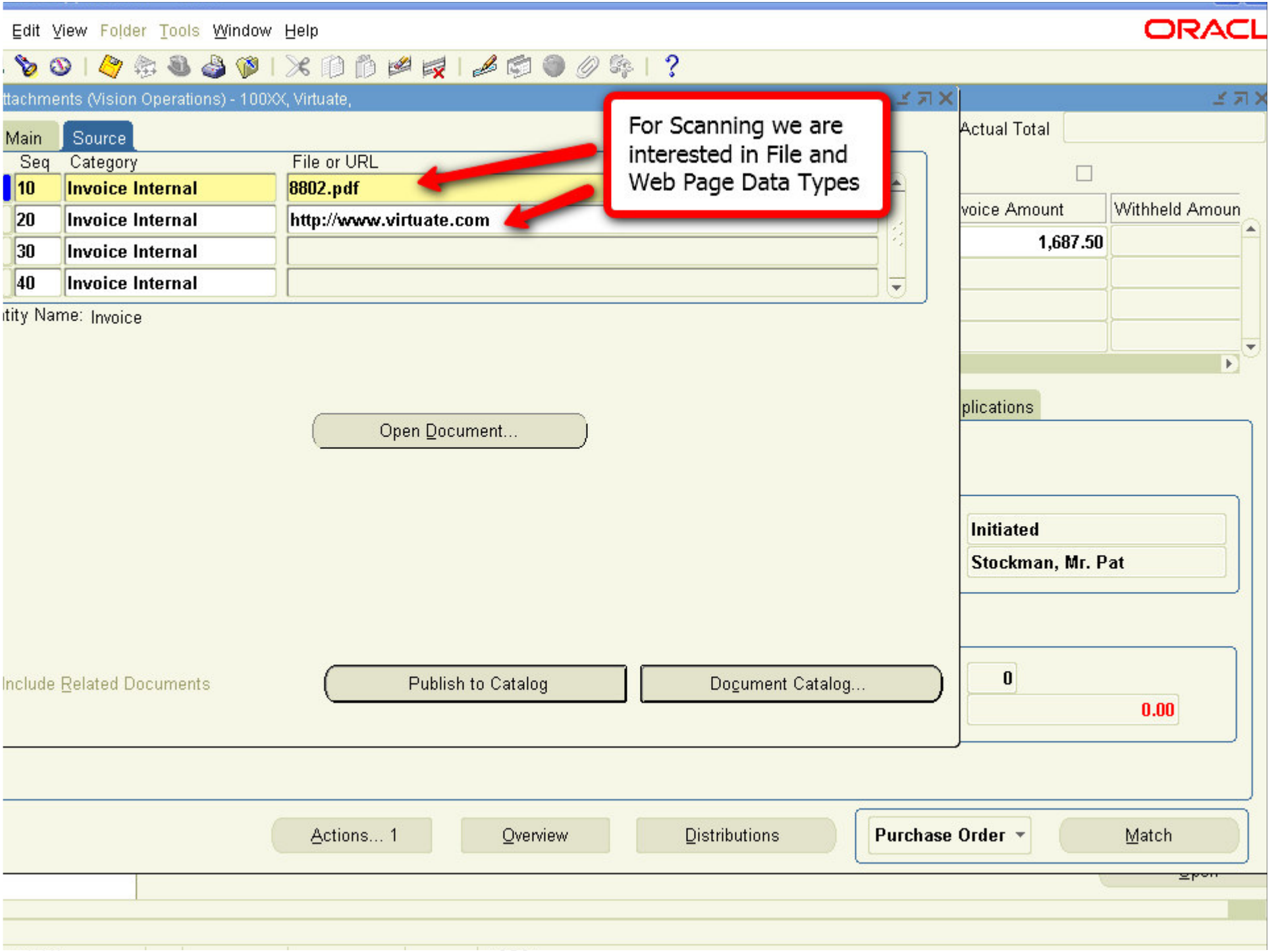
Web Page – Adequate for URLs

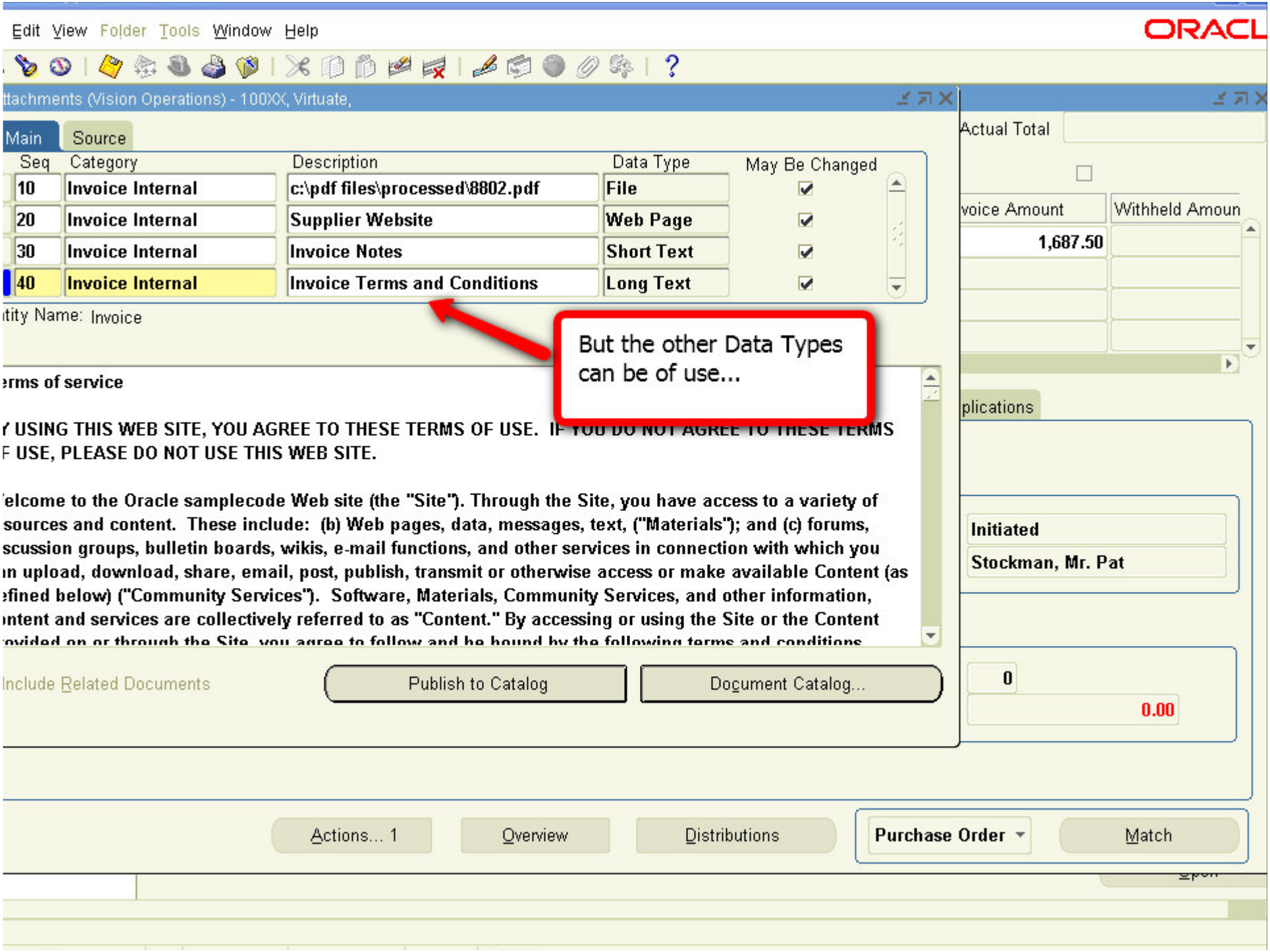
Short Text - a few Paragraphs

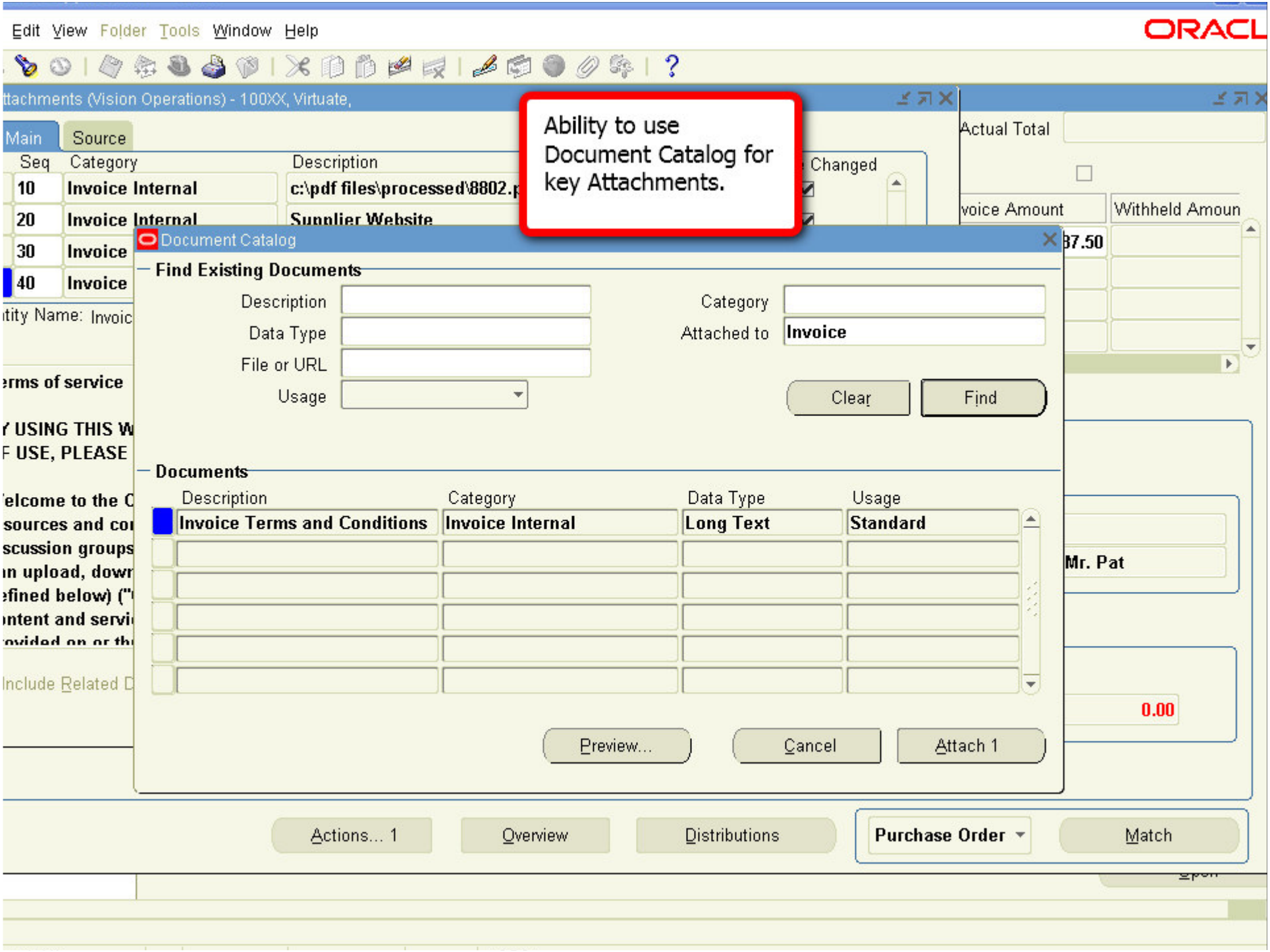
Long Text - many Novels

File - Huge+*

* Huge files not recommended!


Edit View Folder Tools Window Help
ORACL
ttachments (Vision Operations) - 100XX, Virtuate,
For Scanning we are interested in File and Web Page Data Types
Main
Source
Seq
Category
File or URL
10
Invoice Internal
8802.pdf
20
Invoice Internal
http://www.virtuate.com
30
Invoice Internal
40
Invoice Internal
tity Name: Invoice
Actual Total
voice Amount
Withheld Amoun
1,687.50
plications
Open Document...
Initiated
Stockman, Mr. Pat
Include Related Documents
Publish to Catalog
Document Catalog...
0
0.00
Actions... 1
Overview
Distributions
Purchase Order
Match


Edit View Folder Tools Window Help
ORACL
ttachments (Vision Operations) - 100XX, Virtuate,
Main
Source
Seq
Category
Description
Data Type
May Be Changed
10
Invoice Internal
c:\pdf files\processed\8802.pdf
File
20
Invoice Internal
Supplier Website
Web Page
30
Invoice Internal
Invoice Notes
Short Text
40
Invoice Internal
Invoice Terms and Conditions
Long Text
tity Name: Invoice
But the other Data Types can be of use...
Actual Total
voice Amount
Withheld Amoun
1,687.50
plications
Initiated
Stockman, Mr. Pat
erms of service
' USING THIS WEB SITE, YOU AGREE TO THESE TERMS OF USE. IF YOU DO NOT AGREE TO THESE TERMS
F USE, PLEASE DO NOT USE THIS WEB SITE.
elcome to the Oracle samplecode Web site (the "Site"). Through the Site, you have access to a variety of
sources and content. These include: (b) Web pages, data, messages, text, ("Materials"); and (c) forums,
scussion groups, bulletin boards, wikis, e-mail functions, and other services in connection with which you
n upload, download, share, email, post, publish, transmit or otherwise access or make available Content (as
efined below) ("Community Services"). Software, Materials, Community Services, and other information,
ntent and services are collectively referred to as "Content." By accessing or using the Site or the Content
ovided on or through the Site, you agree to follow and be bound by the following terms and conditions
Include Related Documents
Publish to Catalog
Document Catalog...
0
0.00
Actions... 1
Overview
Distributions
Purchase Order
Match

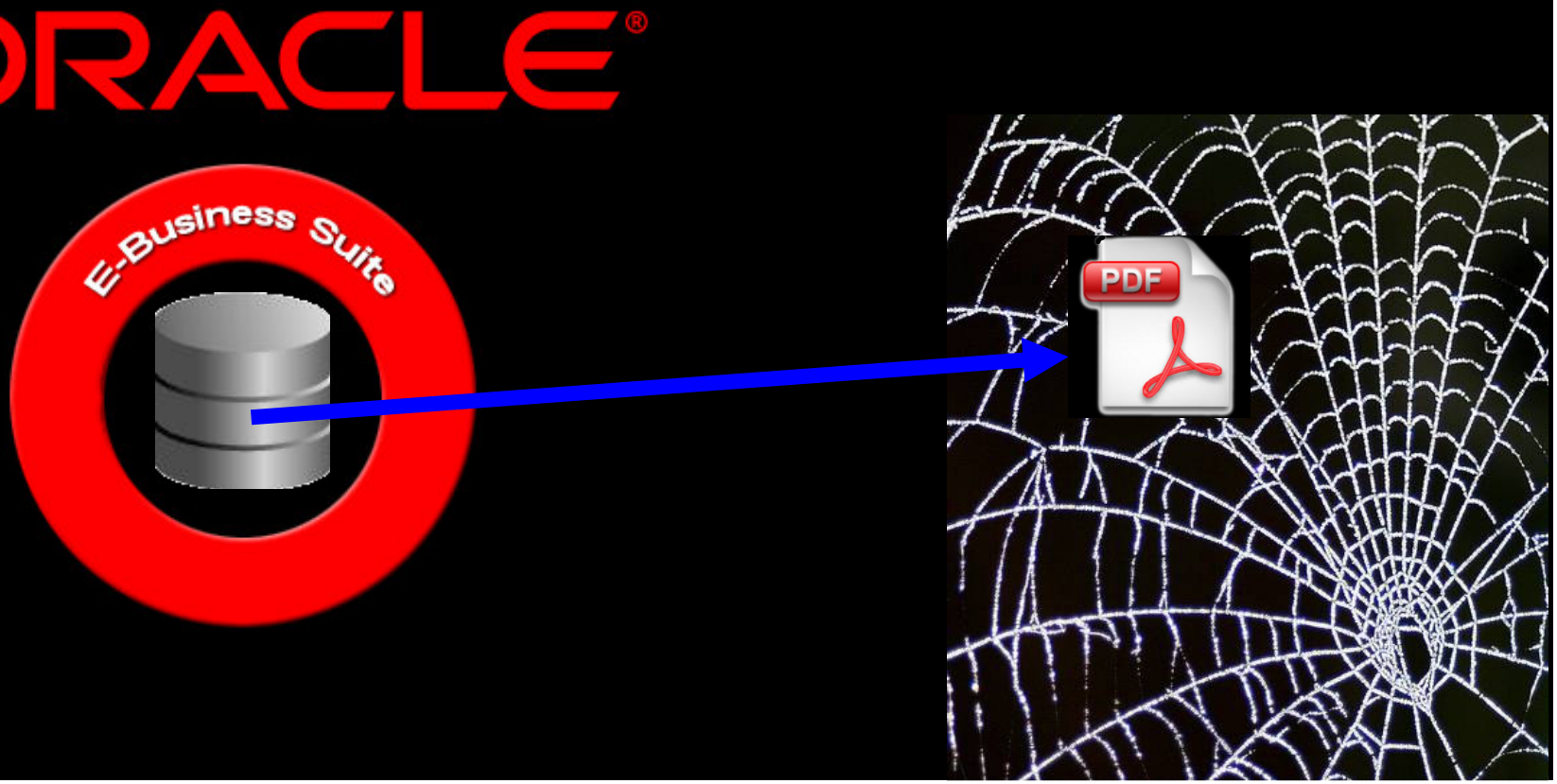

Edit View Folder Tools Window Help
ORACL
ttachments (Vision Operations) - 100XX, Virtuate,
Ability to use Document Catalog for key Attachments.
Main
Source
Seq
Category
Description
Changed
10
Invoice Internal
c:\pdf files\processed\8802.p
20
Invoice Internal
Supplier Website
30
Invoice
40
Invoice
tity Name: Invoic
erms of service
Y USING THIS W
F USE, PLEASE
elcome to the C
sources and cor
scussion groups
n upload, down
efined below) ("
ntent and servi
ovided on or th
Include Related D
Actual Total
voice Amount
Withheld Amoun
37.50
Mr. Pat
0.00
Document Catalog
Find Existing Documents
Description
Data Type
File or URL
Usage
Category
Attached to
Invoice
Clear
Find
Documents
Description
Category
Data Type
Usage
Invoice Terms and Conditions
Invoice Internal
Long Text
Standard
Preview...
Cancel
Attach 1
Actions... 1
Overview
Distributions
Purchase Order
Match

OPTION A
Store with the source transaction
File

OPTION B

Link to external storage (Document Management)

Web Page (URL)



Will my database

blow up

when I put in

PDF Files?

ORACLE = Scalability

100,000 / year @ 50KB = 5GB

or 5% of that

$149

1TB disk at Dick Smiths

WD Elements 1TB Portable Hard Drive

Read Reviews

SAVE $40.00

NZ$149

More Info

Add to Cart

What things would you want to attach?

Scanned
Transactional
Hardcopy
Documents...

Why stop there?

Company Logos

Adhoc Customer Correspondence

Website References

Marketing Phrases

Terms & Conditions

So how do we attach stuff?

Walkthrough

Receive Centrally

Scan

Data Entry

ScanToEBS

Approve

Sometimes

is

clunky … or slow

... or both

☹

Video: Data Entry

20 seconds

a better way...

ScanToEBS

The **most efficient** way to get your paper documents into the Oracle E-Business Suite!

What is ScanToEBS?

+

ORACLE
EBS
Plug-in

VIRTUATE

Integrated:

Authentication

Authorization

Internet Architecture

Unique:

Voucher Number

or use Document Sequences

Attach as:

File

Web Page

Attach to:

Supplier Invoices

Sales Invoices

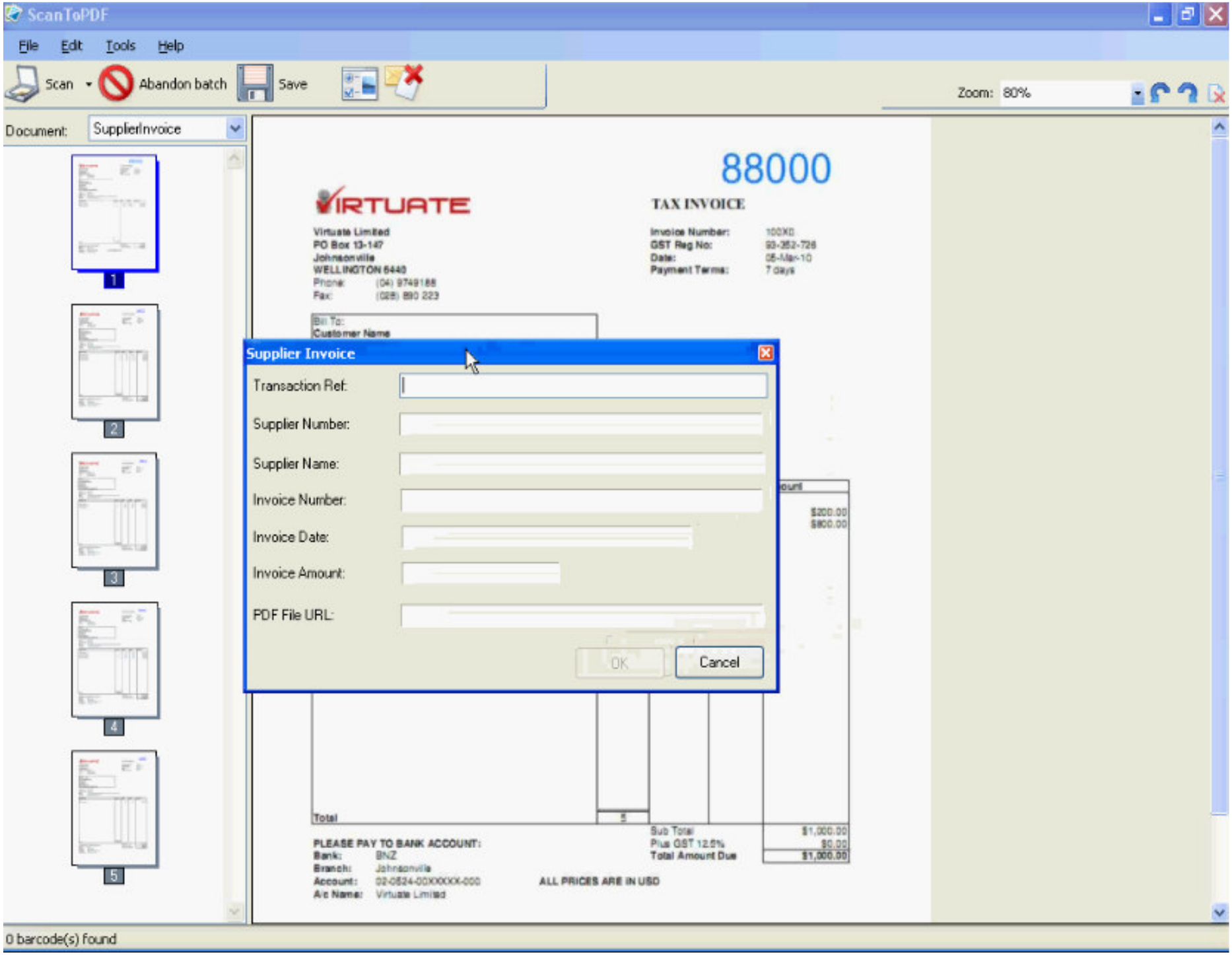
Customer Receipts

Purchase Orders

Supplier Invoices:

Automatically Submits

Invoice Approval


ScanToPDF
File
Edit
Tools
Help
Scan
Abandon batch
Save
Zoom: 80%
Document:
SupplierInvoice
1
2
3
4
5
88000
VIRTUATE
TAX INVOICE
Virtuate Limited
PO Box 13-147
Johnsonville
WELLINGTON 6440
Phone: (04) 9749188
Fax: (028) 890 223
Invoice Number:
GST Reg No:
Date:
Payment Terms:
7 days
Bill To:
Customer Name
Supplier Invoice
Transaction Ref:
Supplier Number:
Supplier Name:
Invoice Number:
Invoice Date:
Invoice Amount:
PDF File URL:
OK
Cancel
$200.00
$800.00
Total
Sub Total
$1,000.00
Plus GST 12.5%
$0.00
Total Amount Due
$1,000.00
PLEASE PAY TO BANK ACCOUNT:
Bank: BNZ
Branch: Johnsonville
Account: 02-0524-0XXXXXX-000
A/c Name: Virtuate Limited
ALL PRICES ARE IN USD
0 barcode(s) found

Video: ScanToEBS

5 seconds

4x faster

100,000 / year @ 20 seconds = 555 hours

100,000 / year @ 5 seconds = 138 hours

SAVE 52 business days

Reduce Errors
Increase Payment Turnover
Segregation of Duties
Submit Approval

ScanToEBS

The **most efficient** way to get your paper documents into the Oracle E-Business Suite!

APPROVE

Walkthrough

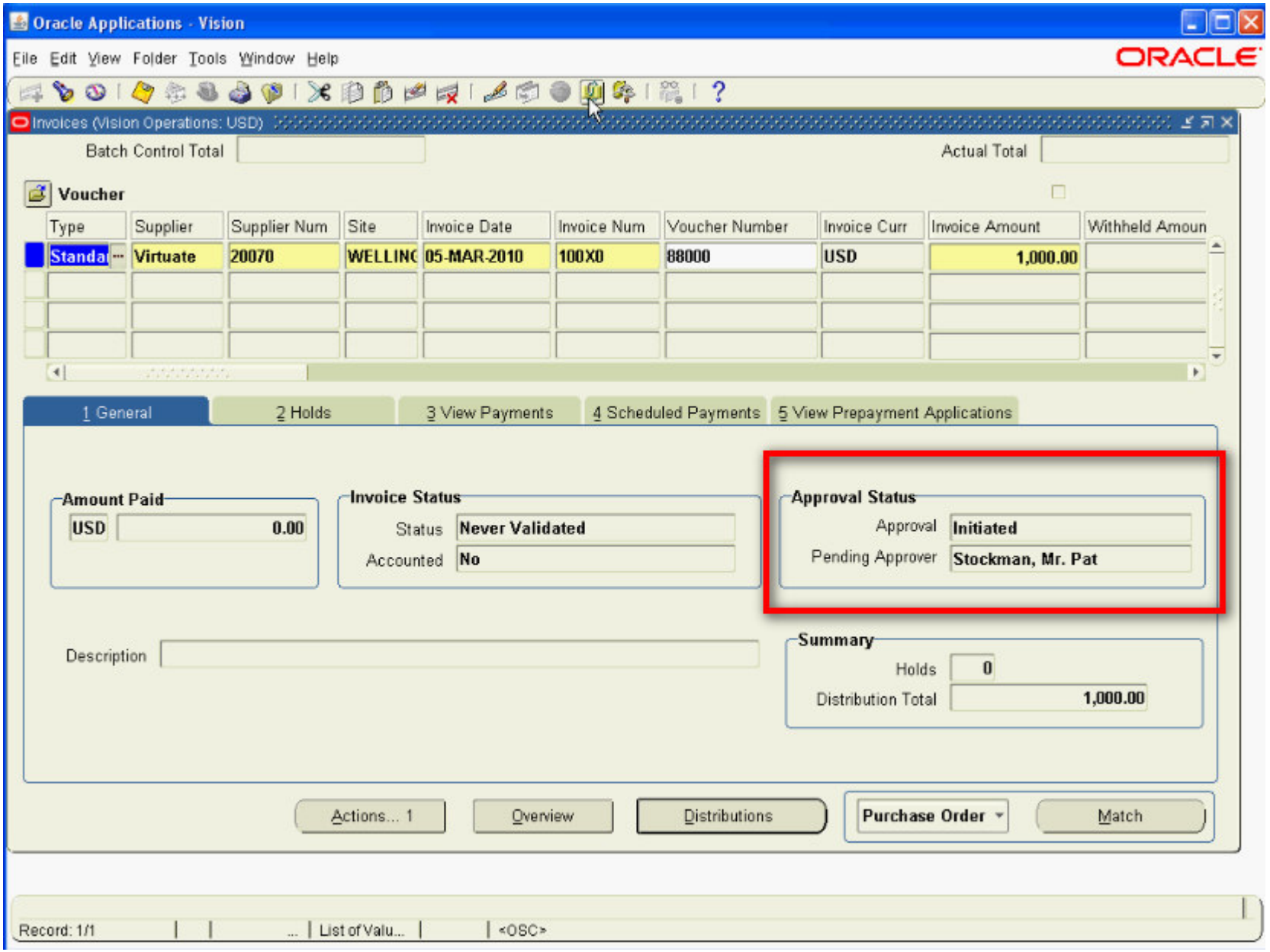
Receive Centrally

Scan

Data Entry

ScanToEBS

Approve


Oracle Applications - Vision
File Edit View Folder Tools Window Help
ORACLE
Invoices (Vision Operations: USD)
Batch Control Total
Actual Total
Voucher
Type
Supplier
Supplier Num
Site
Invoice Date
Invoice Num
Voucher Number
Invoice Curr
Invoice Amount
Withheld Amoun
Standa
Virtuate
20070
WELLINC
05-MAR-2010
100X0
88000
USD
1,000.00
1 General
2 Holds
3 View Payments
4 Scheduled Payments
5 View Prepayment Applications
Amount Paid
USD
0.00
Invoice Status
Status
Never Validated
Accounted
No
Approval Status
Approval
Initiated
Pending Approver
Stockman, Mr. Pat
Description
Summary
Holds
0
Distribution Total
1,000.00
Actions... 1
Overview
Distributions
Purchase Order
Match
Record: 1/1
List of Valu...
<OSC>

Electronic documents available!

ORACLE

Invoice 100XX for Virtuate requires your approval.

To **Stockman, Mr. Pat**
Sent **24-Feb-2010 14:41:12**
Closed **24-Feb-2010 14:43:26**
ID **952955**

Attachments 8802_1.pdf

Accounts Payable has received an invoice, but the invoice cannot be paid until you provide your approval.

Supplier: Virtuate
Supplier Site: WELLINGTON
Invoice Date: 31-MAR-2009
Invoice Number: 100XX

SEND

Case Study #2

Example: Receivables Invoices

Issues: ATTACHMENTS

Case Study #2

Example: Receivables Invoices

Goals:

Send ATTACHMENTS

Brand

Case Study #2

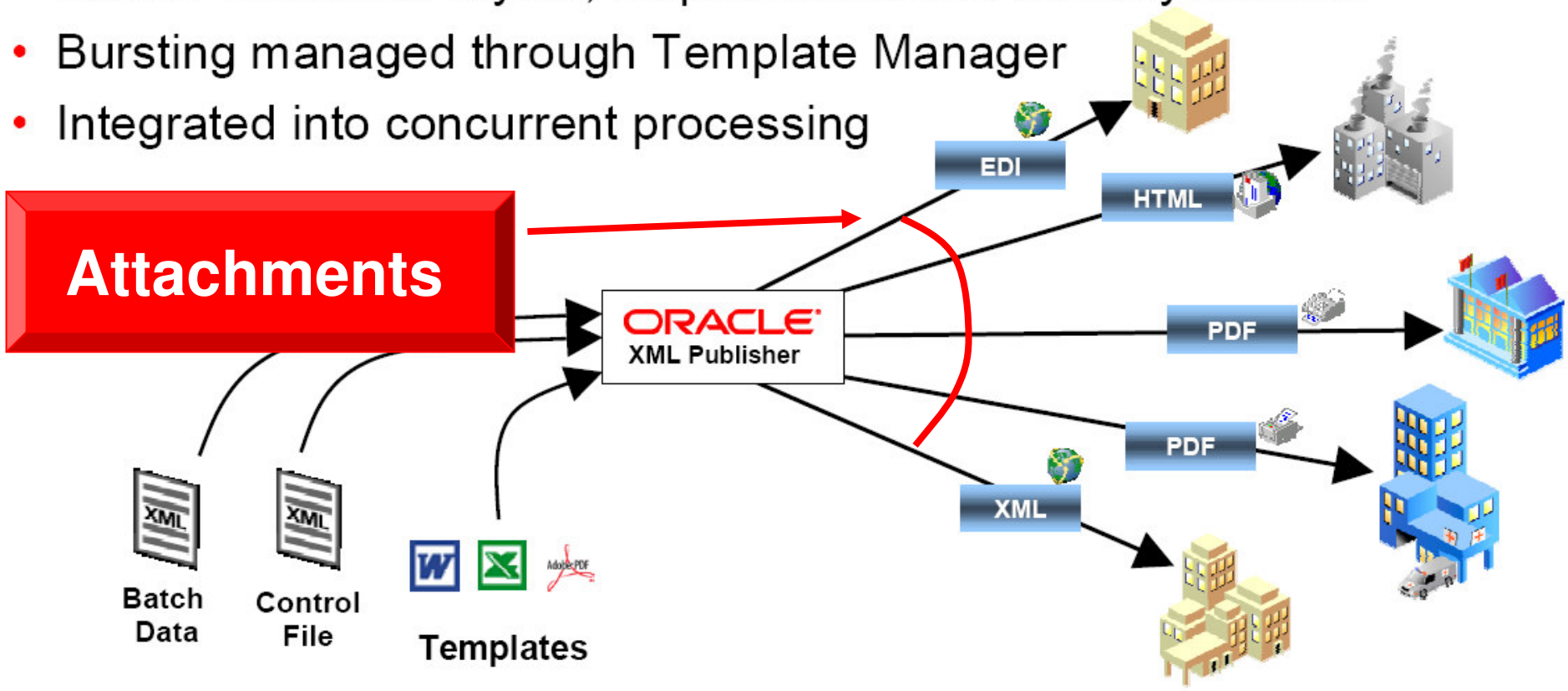
Solution

Attach, Send

BI Publisher

BI Publisher Bursting

- Burst individual documents from a batch
- Dynamic generation based on data
- Deliver in desired layout, output format and delivery channel
- Bursting managed through Template Manager
- Integrated into concurrent processing



Where do I use document attachments for Branding?

Email

Documents

Images

Logos

Phrases

Print

Logos

Images

Marketing Phrases

VIRTUATE

TAX INVOICE

Virtuate Limited
PO Box 13-147
Johnsonville
WELLINGTON 6440
Phone: (04) 9749188
Fax: (028) 800 223

Invoice Number: 100XX
GST Reg No: 93-352-726
Date: 31-Mar-09
Payment Terms: 7 days

Bill To:
Customer Name
The Customer Street
PO Box 11X
Thorndon
WELLINGTON
Attn: Customer Contact Name

Client: Customer
Consultant: Consultant 1
Role: Oracle Applications Development / Consultancy / Support
Period: 1-Feb-10 to 28-Feb-10

Description	Hours	Rate	GST	Amount
Task Number A	1	150	12.5	$150.00
Task Number B	2	150	12.5	$300.00
Task Number C	3	150	12.5	$450.00
Task Number D	4	150	12.5	$600.00
Total	10			

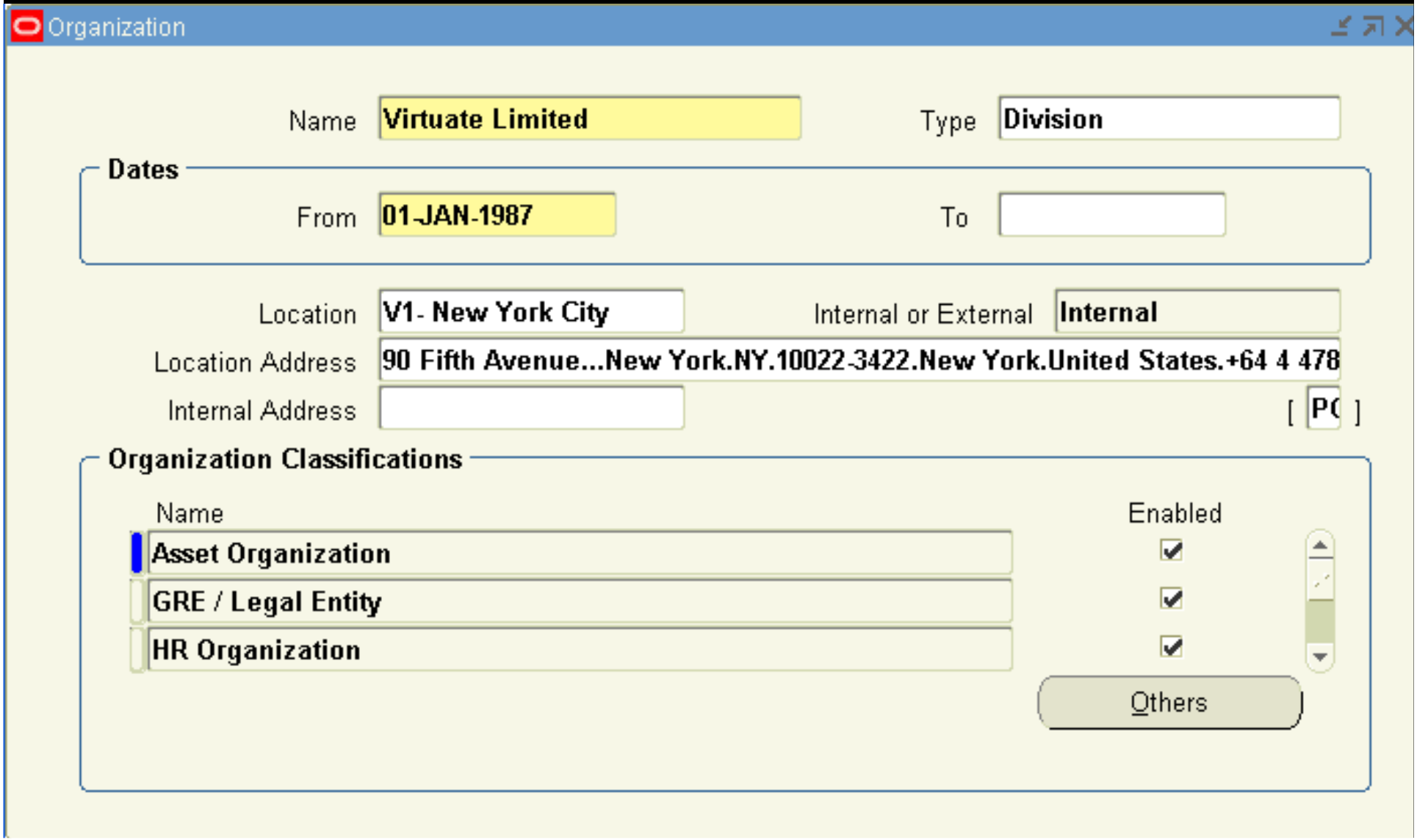
Sub Total $1,500.00
Plus GST 12.5% $187.50
Total Amount Due $1,687.50

PLEASE PAY TO BANK ACCOUNT:
Bank: BNZ
Branch: Johnsonville
Account: 02-0524-00XXXXX-000
A/c Name: Virtuate Limited

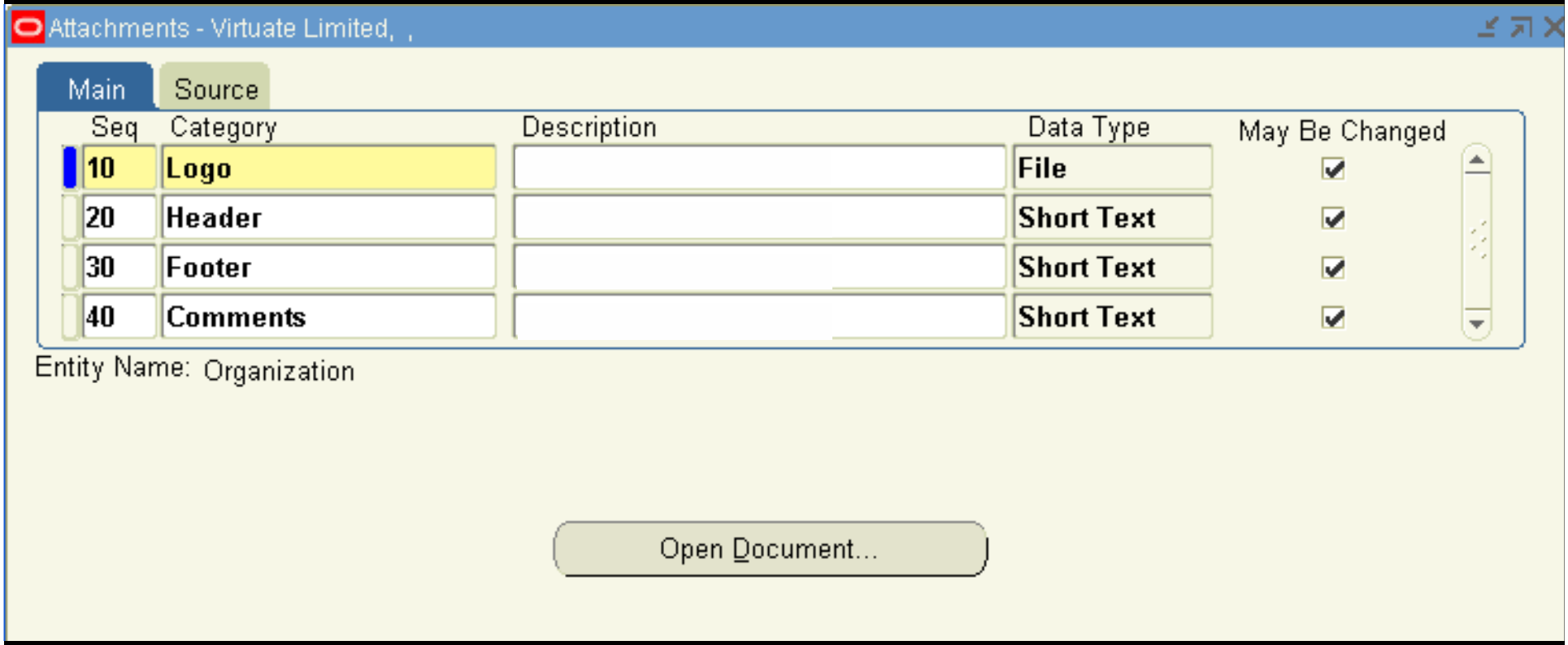
Receivables

Come and visit our stand
at the NZOUG Conference
- March 15th - 16th in Rotorua

Take one organization ...



Add some attachments ...



And a
skilled developer…

single database source for branding

VIRTUATE

Virtuate Limited
PO Box 13-147
[illegible]
WELLINGTON 6440
Phone: (04) 9749188
Fax: (028) 800 223

TAX INVOICE

Invoice Number: 100XX
GST Reg No: 93-352-726
Date: 31-Mar-09
Payment Terms: 7 days

Bill To:
Customer Name
The Customer Street
PO Box 11X
Thorndon
WELLINGTON
Attn: Customer Contact Name

Client: Customer
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Role: Oracle Applications Development / Consultancy / Support
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Task Number D	4	150	12.5	$600.00
Total	10			

Sub Total $1,500.00
Plus GST 12.5% $187.50
Total Amount Due $1,687.50

PLEASE PAY TO BANK ACCOUNT:
Bank: BNZ
Branch: Johnsonville
Account: 02-0584-00XXXXX-000
A/c Name: Virtuate Limited

Receivables

Come and visit our stand
at the NZOUG Conference
- March 15th - 16th in Rotorua

The BEST reporting solution!

9.30am Tuesday

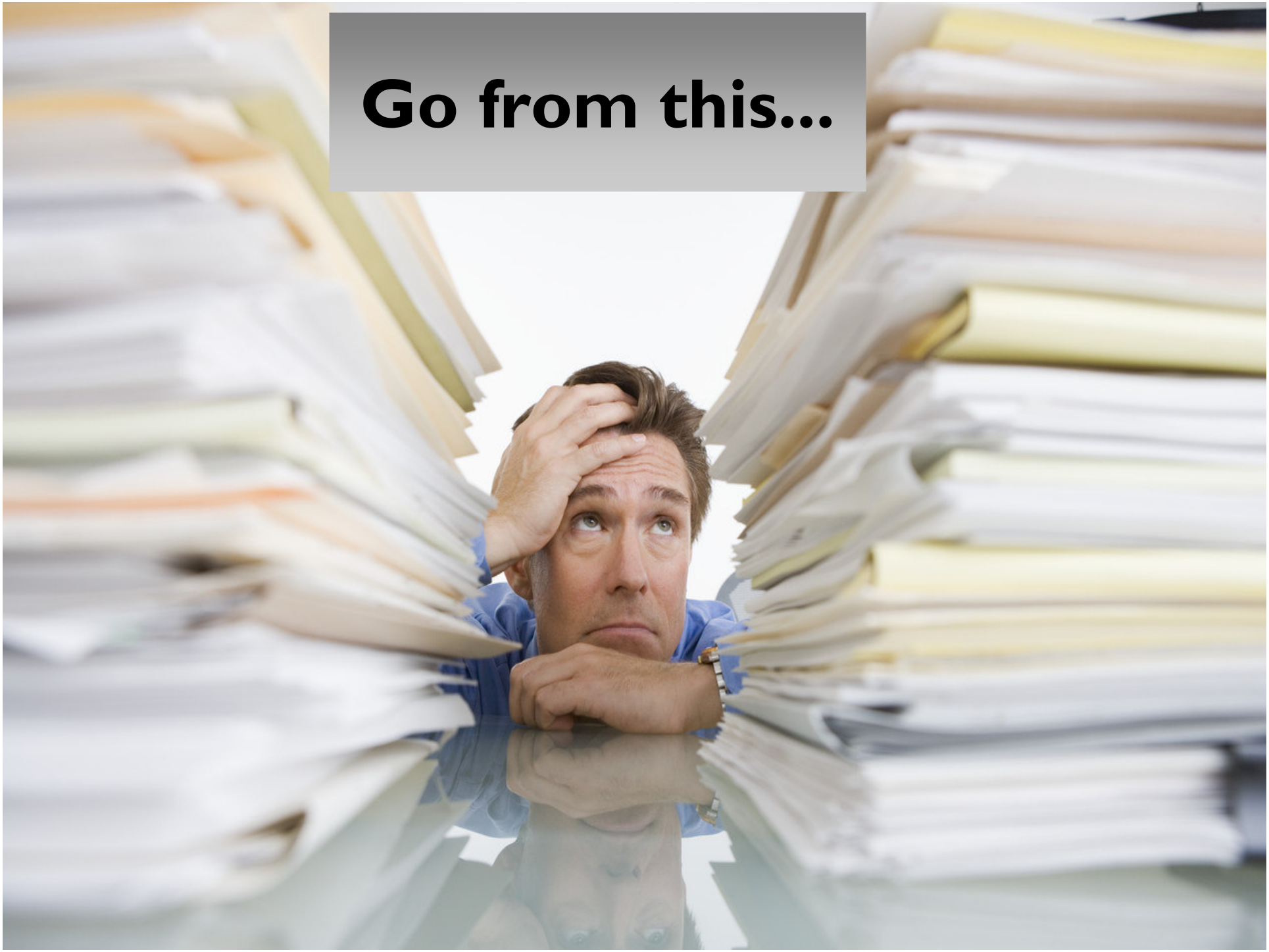
Advert ☺

Packaged Solutions

SCAN
ATTACH
SEND
APPROVE

- **Increase Efficiency**
- **Increase Accuracy**
- **Reduce Times**
- **Reduce Costs**

Go from this...



To this...

R12 Upgrade Q&A Session

1.30pm Monday

The BEST reporting solution!

9.30am Tuesday

Exhibition Hall #11

gareth.roberts@virtuate.com
http://www.virtuate.com
http://www.scantoebs.com

ORACLE Gold Partner