

PEOPLESOFT ADAPTER FOR ORACLE CONTENT MANAGEMENT: **IMAGING**

KEY FEATURES & BENEFITS

- **Enterprise-wide imaging platform** that content-enables PeopleSoft, third party or custom applications on a unified repository with shared services management.
- **Seamlessly integrated user experience** designed to streamline business operations, providing access to imaged documents directly from familiar PeopleSoft pages.
- **Single vendor simplicity**, with an end-to-end solution for capture, imaging and workflow on the same infrastructure as PeopleSoft.
- **High ROI solution**, with a SOA-based integration that enables flexible deployment architectures, minimizes customization costs, and provides long-term value as the default imaging capability for future releases of Oracle Applications.

The PeopleSoft Adapter for Oracle Content Management's imaging solution automates paper-intensive processes by coupling document capture and imaging technology with workflow, to enable organizations running PeopleSoft to streamline high volume, document-intensive processes like invoice processing or employee on-boarding. The Adapter delivers a seamlessly integrated user experience to PeopleSoft, via a loosely-coupled, service oriented architecture that brings imaging capabilities to any forms-based application module, and can also be extended for use by those outside of the PeopleSoft environment to achieve greater efficiencies.

Oracle Content Management and PeopleSoft's Integrated Functionality

The PeopleSoft Adapter for Oracle Content Management's imaging solution delivers an advanced imaging and workflow solution, with a core set of features that help manage large volumes of content and streamline operations across all functions that support critical business processes – back office clerks, departmental managers, business users and IT administrators.

For the back office clerk, the PeopleSoft Adapter for Oracle Content Management streamlines common operations like data entry by exposing imaging and workflow capabilities from within familiar PeopleSoft pages. With the PeopleSoft Adapter for Oracle Content Management, imaged documents are exposed using links on PeopleSoft pages and tables, and data entry is done via PeopleSoft screens. This allows the user to leverage business rules and validations provided by PeopleSoft, while the final validated data can be pushed into the content repository eliminating the manual indexing of images. Additionally, Oracle Content Management provides the ability to retrieve supporting documents by executing searches against index data allowing documents to be easily accessed from multiple business records e.g. a vendor contract that may need to be referred to while reviewing any voucher from that vendor.

For the departmental manager, the PeopleSoft Adapter for Oracle Content Management cuts down on departmental processing time by leveraging the powerful Oracle BPEL Process Manager workflow engine for areas of process automation that are not natively handled by ERP systems, such as exception handling. The PeopleSoft Adapter for Oracle Content Management is designed to complement and take advantage of validation and approval rules that customers may have already configured in PeopleSoft, building out workflows to provide a complete solution to support process such as Accounts Payable or Expense Management. Real-time business intelligence capabilities are provided by Oracle Business Activity Monitoring, offering visibility into in-flight processes at the individual and aggregate level which enables workload to be monitored and process bottlenecks to be identified enabling continuous process improvement.

For the business user, the PeopleSoft Adapter for Oracle Content Management provides access to those users who are outside the PeopleSoft environment, exposing imaged

SPECIFICATIONS

COMPONENTS

- PeopleSoft Enterprise Applications
- Oracle Imaging and Process Management 10gR3:
 - Includes Oracle Business Process Management Suite (restricted use license)
- PeopleSoft Adapter for Oracle Enterprise Content Management

PEOPLESOFT CERTIFIED VERSIONS

- PeopleSoft 8.9 or 9.0 with
- PeopleTools 8.4.9

RELATED TECHNOLOGIES

- Oracle Document Capture
- Oracle Forms Recognition
- Oracle Universal Records Management
- PeopleSoft Enterprise e-Settlements

FOR MORE INFORMATION

Visit the Oracle Technology Network:

www.oracle.com/technology/products/content-management/ipm/index.html

documents as standard URLs in email notifications, for easy review and approval.

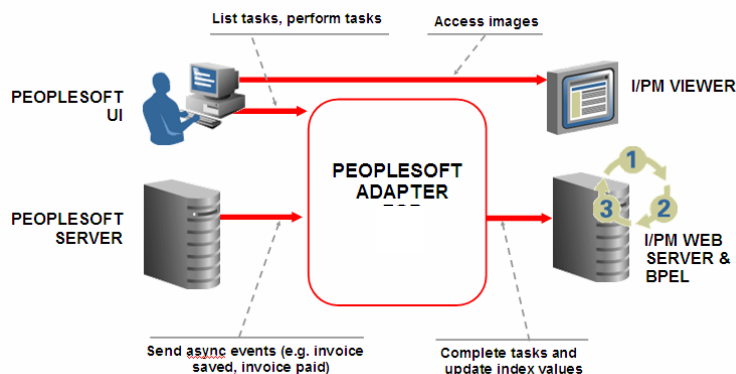
For the IT administrator, the PeopleSoft Adapter for Oracle Content Management offers a flexible, enterprise-wide solution that enables them to meet the functional requirements of financial management automation as well as other departments who require imaging and workflow functionality, without having to sacrifice the integrity of their applications infrastructure or increase IT expenses in order to do so. As a loosely-coupled, service oriented architecture-based integration, Oracle Content Management requires minimal hooks to integrate with PeopleSoft applications, ensuring that ongoing maintenance and future system upgrades will not require high services costs or jeopardize the ability to upgrade one system without impacting the other.

The Benefits of Oracle Content Management's Integration Approach

The PeopleSoft Adapter for Oracle Content Management's imaging solution includes the following components:

- **Oracle Imaging and Process Management (Oracle I/PM):** Oracle I/PM acts as the storage and retrieval system for imaged documents. It provides a highly scalable and secure content repository, with built in lifecycle management that effectively handles documents throughout the various stages of business operations until they need to be archived for safekeeping. Oracle I/PM includes a restricted use license of Oracle Business Process Management Suite, enabling it to leverage the Oracle BPEL Process Manager for workflow. Oracle I/PM also includes the viewer component, to expose images, and provides the annotation and redaction capabilities.
- **PeopleSoft Adapter for Oracle Content Management – Imaging Solution:** The adapter is an out-of-the-box integration that manages the list of configured integrations and their association with the solution templates. This allows the addition of commands to PeopleSoft pages, and what happens when those commands are invoked by PeopleSoft users, to be configurable via Oracle I/PM tools and not hard-coded in the PeopleSoft integration. The PeopleSoft Adapter for Oracle Content Management is built using a standardized application extension framework, to ensure consistency for all integration, across PeopleSoft modules and other Oracle applications.
- **UI extensions:** Configurable PeopleSoft sub-pages (buttons, links, drop down menus) that can be added to PeopleSoft pages to enable users to access workflow tasks (e.g. data entry, approvals, voucher review) and documents associated with business records. The provided sub-pages can be added to any PeopleSoft page and the behavior configured without any custom development.

Fig. 1 | Oracle I/PM and PeopleSoft Enterprise integration via the PeopleSoft Adapter for Oracle Content Management

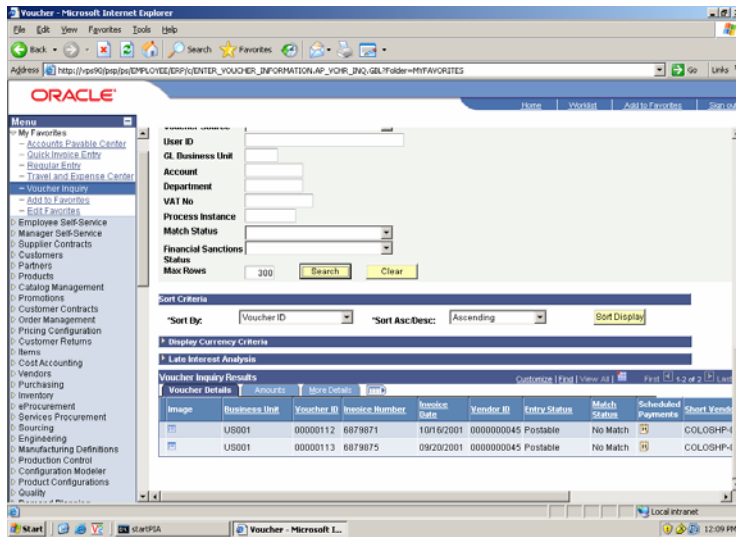


- Solution templates:** Best practice templates for automating invoice and receipt processing comprising BPEL-based workflows with associated approval rules, data entry forms and reports.

The PeopleSoft Adapter for Content Management’s approach allows Oracle I/PM to be maintained separately from your PeopleSoft environment, while providing end users access to documents and workflow tasks in the context of their application environment. A simple example of the functionality that the adapter component provides to PeopleSoft users is accessing images.

Document Access With Oracle I/PM and PeopleSoft Enterprise Payables

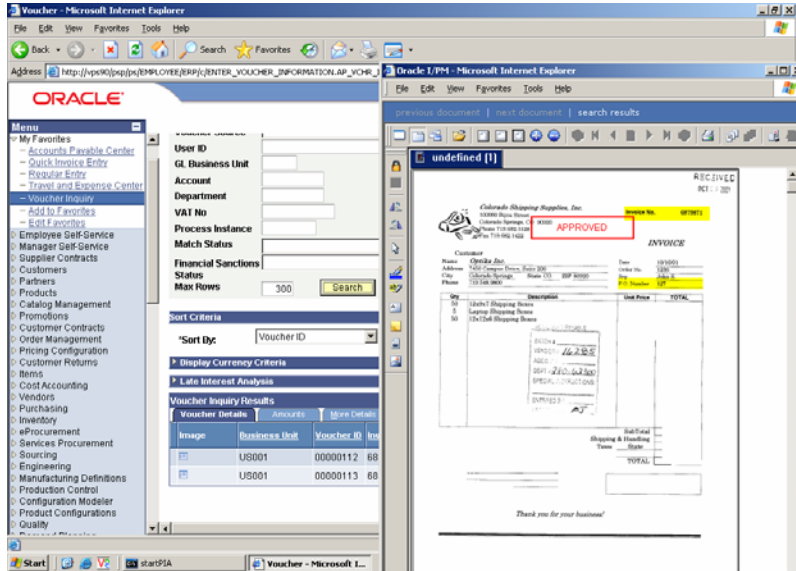
Accounts payable clerks often have to search for vouchers submitted by a particular vendor – the clerk enters the vendor information into the voucher enquiry screen and executes the search.



The scanned invoice is accessible via a link in the voucher search results table as well as from the voucher detail screen. Organizations can also secure the integrations – specifying which PeopleSoft roles have access to the Oracle I/PM options.

| Sort Criteria | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|---------------|------------|----------------|--------------|------------|--------------|--------------|--------------------|---------------|-------|---------------|------------|----------------|--------------|-----------|--------------|--------------|--------------------|---------------|--|-------|----------|---------|------------|------------|----------|----------|--|----------|--|-------|----------|---------|------------|------------|----------|----------|--|----------|
| *Sort By: | | Voucher ID | | | *Sort Asc | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Display Currency Criteria | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Late Interest Analysis | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Voucher Inquiry Results | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1"> <thead> <tr> <th>Image</th> <th>Business Unit</th> <th>Voucher ID</th> <th>Invoice Number</th> <th>Invoice Date</th> <th>Vendor ID</th> <th>Entry Status</th> <th>Match Status</th> <th>Scheduled Payments</th> <th>Short Voucher</th> </tr> </thead> <tbody> <tr> <td></td> <td>US001</td> <td>00000112</td> <td>6879871</td> <td>10/16/2001</td> <td>0000000045</td> <td>Postable</td> <td>No Match</td> <td></td> <td>COLOSHPH</td> </tr> <tr> <td></td> <td>US001</td> <td>00000113</td> <td>6879875</td> <td>09/20/2001</td> <td>0000000045</td> <td>Postable</td> <td>No Match</td> <td></td> <td>COLOSHPH</td> </tr> </tbody> </table> | | | | | | | | | | Image | Business Unit | Voucher ID | Invoice Number | Invoice Date | Vendor ID | Entry Status | Match Status | Scheduled Payments | Short Voucher | | US001 | 00000112 | 6879871 | 10/16/2001 | 0000000045 | Postable | No Match | | COLOSHPH | | US001 | 00000113 | 6879875 | 09/20/2001 | 0000000045 | Postable | No Match | | COLOSHPH |
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Clicking on the invoice image icon in the table executes a search in Oracle I/PM passing the details of the voucher in that row to the search. This search has been configured to return the invoice image. The documents are opened in the Oracle I/PM viewer allowing the user to annotate the document if necessary e.g. to post a note about an incorrect address.



The search that is executed as well as the mapping between the voucher that is selected and the search parameters in Oracle I/PM is configured via the PeopleSoft Adapter for Oracle Content Management. This approach allows additional searches to be made available e.g. during voucher entry the organization may also want to be able to search for all invoice images from a vendor that have the same invoice number to validate whether a new invoice is a duplicate or a re-submission.

Maximize Your IT Investment by Image-enabling the Enterprise

With the PeopleSoft Adapter for Oracle Content Management's imaging solution, accounts payable automation is just the beginning. As an enterprise imaging platform, you can expand services to other financials applications or even to other PeopleSoft modules, from Human Resources to Campus Solutions – without the complexity of administering multiple imaging systems, or incurring additional licensing costs. Oracle Content Management is the planned default imaging repository for Oracle Fusion Applications, so you can rest easy that you've made a sound long-term investment that will provide ongoing high return – image-enable applications across the enterprise, built on open integrations, with the simplicity of a single vendor solution only from Oracle.

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