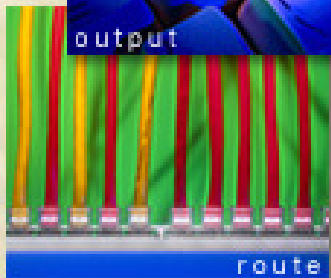




# EVERGREEN

DATA SYSTEMS

## Electronic Creation & Distribution of Oracle Data Including Web Storage & Retrieval



The  
**ERP**  
data  
output  
experts



**ORACLE**  
PartnerNetwork  
MEMBER PARTNER

Robert Kragen  
Friday, August 21, 2009



# Objective

- ⊕ Format ERP output into efficient electronic documents
- ⊕ Increase operational efficiency
- ⊕ Improve internal/external communication
- ⊕ Add more robust feature set to electronic document capabilities



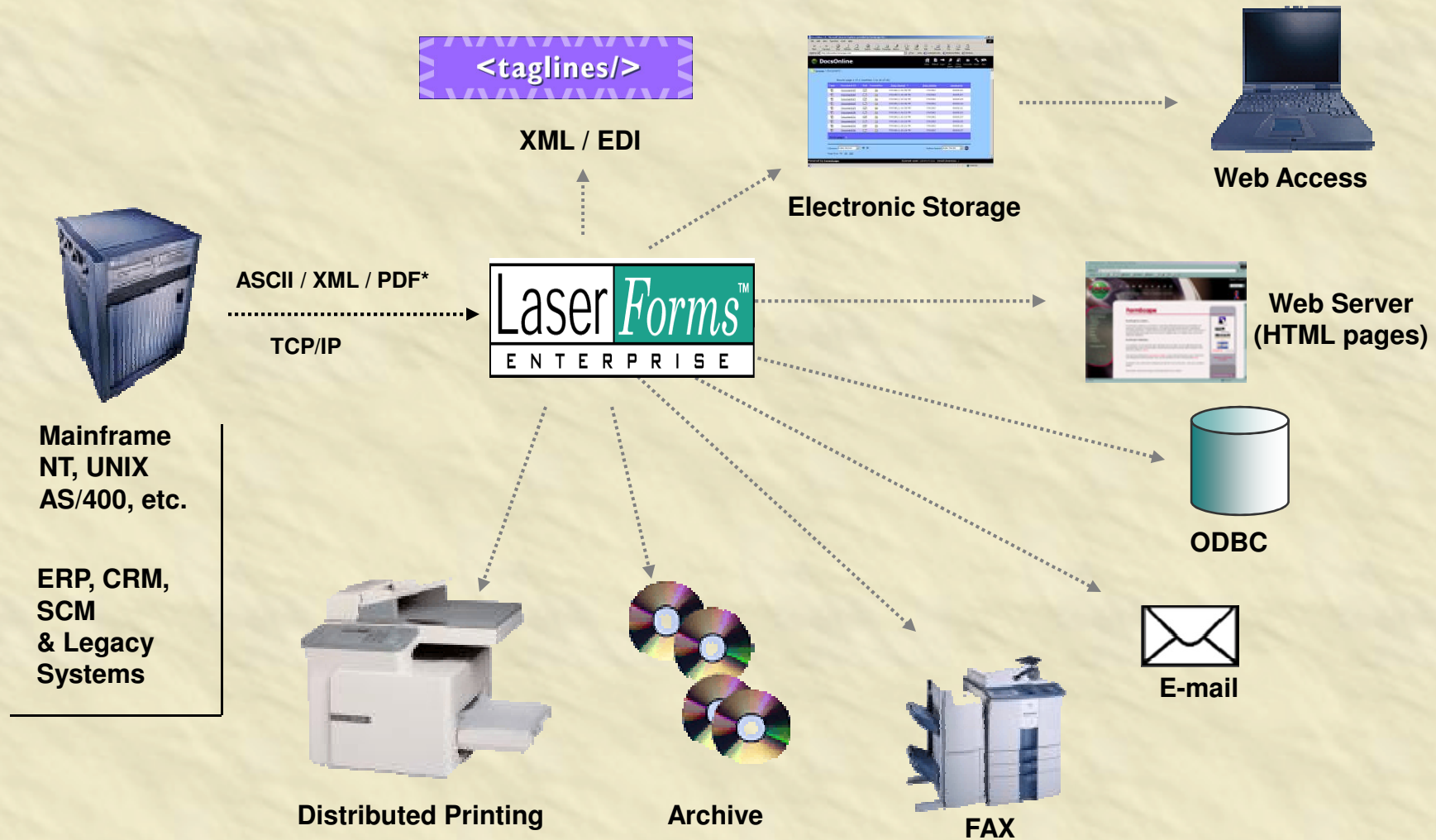
# Gartner

- ⊕ Professionals spend 20% to 40% of their time managing documents
- ⊕ The average business spends 6% to 10% of its earnings on document management
- ⊕ A document costs \$20.00 to file and retrieve
- ⊕ A document costs \$120.00 if it is improperly filed

Gartner Research Report ID Number: SPA-11-9200



# Form Creation Software





# Primary Constituencies

- ⊕ Customer facing
  - ⊕ Invoice
  - ⊕ Statement
  - ⊕ Picking and shipping documents
- ⊕ Supplier focused
  - ⊕ Purchase order
  - ⊕ A/P checks
- ⊕ Employee use
  - ⊕ Pay roll checks
  - ⊕ Benefit summary statements
- ⊕ Internal report when advanced functionality is required
  - ⊕ Sales reports
  - ⊕ Expense detail reporting
  - ⊕ Budget reporting



# How does LFE Integrate with Oracle?

## Basically Printer Queue to Printer Queue communication based on standard protocols: TCP/IP, CUPS, Samba

### ⊕ Evergreen Components

- ✧ Windows Server, houses projects and software
  - Virtual input queue, receives print jobs
  - File converters when needed
- ✧ Developer, creates projects
- ✧ Docs On Line (Web Repository)

### ⊕ Oracle Set-up

- ✧ Register printer

### ⊕ Unix set-up

- ✧ Create Unix Printer Queue mapped to the Evergreen virtual input queue
- ✧ Set up printer as Networked Windows printer with a “raw” or “pass-through” type



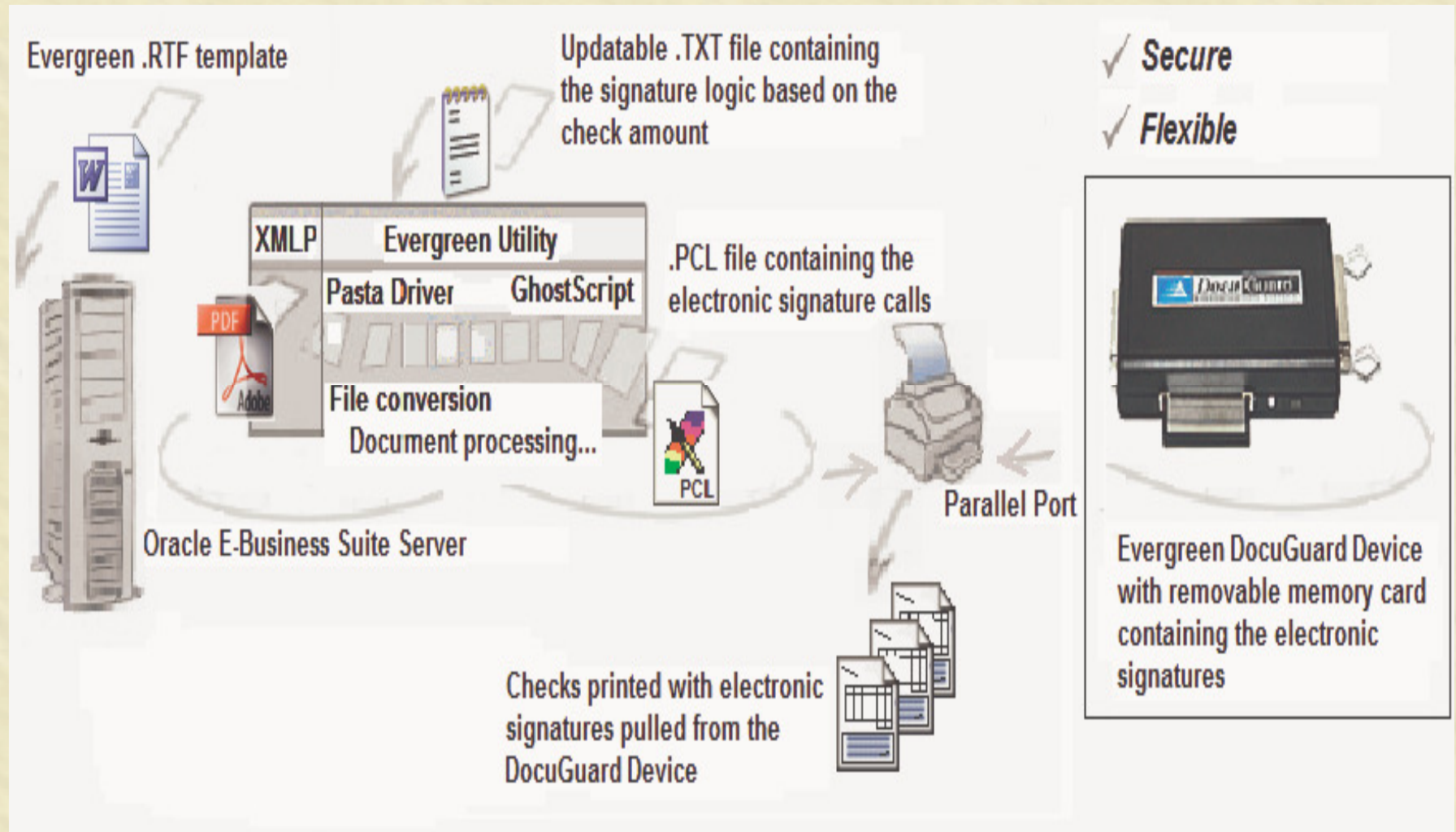
# Oracle Output File Types supported for processing with LaserForms Enterprise

## ⊕ \*\*\*In 11i

- ✧ Preformatted Text, delimited, XML
  - For any business documents: AP checks, Payroll checks, POs, AP invoices...

## ⊕ \*\*\*In R12

- ✧ Preformatted text, delimited, XML
- ✧ PDF converted into Text format using internal parser
  - Specifically for AP checks sourced from new Payments module when XML output cannot be used for current E-Business Suite version (prior to 12.0.6)







# **LaserForms Enterprise (LFE) is a Document Creation, Management and Output Tool**

- ⊕ LaserForms Enterprise provides centralized control over document resources, distribution, and output.
- ⊕ Runs as a middleware application.
- ⊕ Transparent, no user training required.



# Powerful GUI Developer Tool

- ⊕ Format design elements
- ⊕ Drag & drop data mapping
- ⊕ Complete bar code symbologies
- ⊕ Dynamic content through conditional logic
- ⊕ Merge data from outside sources
- ⊕ Design recall indices for document retrieval
- ⊕ Object implementation approach versus code line programming, in a tree structure or configuration UI that holds all together the objects composing the document to print



# Before and After

Ship To: 12345 Street S  
City, CA 11111  
United States

Vendor: VENDOR COMPANY  
12345 MAIN STREET  
CITY, CALIFORNIA 11111  
United States  
Fax: (408) 557-9811  
Phone: (800) 248-2898

Bill To: 12345 Street S  
City, CA 11111  
United States

Cust Acct Vendor    Payment Terms    Freight Terms    FOB  
01-25454 2826    NET 30    Allowed    Origin

Confirm To    Telephone    Requestor - Deli  
John Evans    (800) 248-2898    John Evans

Ln	Part Number / Description	Rev	Delivery
1	Your #: 113-0955-00, REV. A Stamping Die for p/n 113-0955-00, rev. A Please note: The engineer, Marty Wisecarver, must approve the die before production parts can begin.		11-JUN-03
2	Your #: 113-0955-00, REV. A Stamped parts, p/n 113-0955-00, rev. A Please note: The design engineer, Marty Wisecarver, must approve the stamping die before production parts can begin.		18-JUN-03

o SHIP TO:  
Address at top of page

o SHIP TO:  
Address at top of page

<p>1871 The Alameda, Suite 300 San Jose, CA 95126 Phone: (800)-248-2898 Fax: (408)-557-9811</p>		<p>SHIP TO: VENDOR COMPANY 12345 MAIN STREET CITY, CALIFORNIA 11111 Fax: (408) 557-9811 Phone: (800) 248-2898</p>		<p><b>Purchase Order</b></p> <table border="1"> <tr> <th>PO NUMBER</th> <th>REVISION</th> <th>PAGE NO.</th> </tr> <tr> <td>1001</td> <td>0</td> <td>1 of 1</td> </tr> </table> <p><small>THIS PURCHASE ORDER NO. MUST APPEAR ON ALL INVOICES, PACKING SLIPS, CARTONS AND CORRESPONDENCE RELATED TO THIS ORDER.</small></p>		PO NUMBER	REVISION	PAGE NO.	1001	0	1 of 1
PO NUMBER	REVISION	PAGE NO.									
1001	0	1 of 1									
<p>BILL TO: VENDOR COMPANY 12345 MAIN STREET CITY, CALIFORNIA 11111 Fax: (408) 557-9811 Phone: (800) 248-2898</p>		<p>SUPPLIER: VENDOR COMPANY 12345 MAIN STREET CITY, CALIFORNIA 11111 Fax: (408) 557-9811 Phone: (800) 248-2898</p>									
CUSTOMER ACCT. NO. 01-25454	SUPPLIER NO. 2826	PAYMENT TERMS NET 30	FREIGHT TERMS Allowed	FOB Origin	SHIP VIA UPS						
CONFIRM TO / TELEPHONE John Evans (800) 248-2898			REQUESTOR/DELIVER TO John Evans								
LINE NO	PART NUMBER / DESCRIPTION	DELIVERY DATE	QUANTITY		UNIT	UNIT PRICE	AMOUNT	TA			
1	Your #: 113-0955-00, REV. A Stamping Die for p/n 113-0955-00, rev. A Please note: The engineer, Marty Wisecarver, must approve the die before production parts can begin.	11-JUN-03	ORDERED 1.00	BACK ORDERED 0.00	Each	5,750.00	5,750.00	Y			
2	Your #: 113-0955-00, REV. A Stamped parts, p/n 113-0955-00, rev. A Please note: The design engineer, Marty Wisecarver, must approve the stamping die before production parts can begin.	18-JUN-03	150,000.00	0.00	Each	0.07	10,500.00	N			
<p>COMMENTS:</p>							<b>Total</b>	<b>Continued</b>			
<p><small>AUTHORIZED SIGNATURE</small></p>											



# Dynamic Content through Conditional Logic

- ⊕ Logos, Signatures, Terms and Conditions, Multiple languages, etc.
- ⊕ Targeted messages
  - Alerts such as open enrollments
  - Promotional messages
  - Product awareness
- ⊕ Multiple reports from same data stream
  - Control pages can be added to concurrent batch
  - Detail report



# Reformat Reports

## Original Report Data

```

TF251 Date 10/02/01 Company 1111 ACME STAFFING SERVICES USD
Time 07:54 Proc Level (05) ACME STAFFING SERVICES Aging As Of: 09
Company Aging Report
*****
Cus TF251 Date 10/02/01 Company 1111 ACME STAFFING SERVICES USD
Time 07:54 Proc Level (05) ACME STAFFING SERVICES Aging As
Company Aging Report
*****
Cus TF251 Date 10/02/01 Company 1111 ACME STAFFING SERVICES USD
Time 07:54 Proc Level (05) ACME STAFFING SERVICES Aging As
Company Aging Report
*****
Customer
JONES
Trans Address/Contact As Of Total:
----- JONES COMPANY Credit Limit:
I 050 2800 WEST TRAIL
I 050 Transact RALEIGH NC 27513 Pct Of Limit:
I 050 ACCOUNTS PAYABLE 919-555-6222 Terms: N10
I 050
I 050000 -----D a y
I 050000 Transaction P F Trn date CB Current 1 - 30 31 - 60
Custo I 050000 0.00 0.00
I 050000 I 0500001991 08/20/01 0.00 0.00 873.94
I 050000 I 0500002013 08/27/01 0.00 0.00 1438.78
F.O.R. I 0500002035 09/03/01 0.00 1102.95 0.00
Custo I 0500002058 09/10/01 0.00 762.95 0.00
***** I 0500002083 09/17/01 0.00 1202.24 0.00
Cus I 0500002107 09/24/01 0.00 1622.98 0.00
FIR F.O.R. Customer Totals: 0.00 4,691.12 2,312.72
*****
Custo Customer 0.00 % 66.98 % 33.02
FIR F.O.R. Avg 20.15 13.01 34.65
*****
Customer Address/Contact As Of Total:
----- FIRST ENERGY Credit Limit:
I 050 PO BOX 868
I 050 Transact LEXINGTON NC 25072 Pct Of Limit:
I 050 ACCOUNTS PAYABLE 336-555-9978 Terms: N10
I 050
I 050000 -----D a y
I 050000 Transaction P F Trn date CB Current 1 - 30 31 - 60
Custo I 050000 0.00 0.00
I 050000 P 372735 * 10/07/00 0.00 0.00 0.00
I 050000 I 0500001967 * 08/13/01 0.00 0.00 232.73
F.O.R. I 0500002060 09/10/01 0.00 1662.47 0.00
Custo I 0500002085 09/17/01 0.00 1905.03 0.00
I 0500002109 09/24/01 0.00 2814.25 0.00
F.O.R. Customer Totals: 0.00 6,381.75 232.73
*****
Custo Customer 0.00 % 100.00 % 3.65
F.O.R. Avg 11.01 9.74 46.00
  
```

## CREDIT AGING REPORT SUMMARY

<b>Client Name:</b>	ACME STAFFING SERVICES	<b>Current:</b>	0.00 - 0.00%
<b>Client ID:</b>	111105	<b>1 - 30:</b>	87,711.26 - 71.27%
<b>Aging As Of:</b>	09/28/01	<b>31 - 60:</b>	33,047.84 - 26.85%
		<b>61 - 75:</b>	2,070.40 - 1.68%
		<b>76 - 90:</b>	0.00 - 0.00%
		<b>Over- 90:</b>	241.01 - 0.20%

**Credit Limit:** \$100,000.00 **Total Aging Receivables:** \$123,070.51

**Credit Usage:** 123.07% **CREDIT LIMIT WARNING!!! RECEIVABLES EXCEED 90% OF CLIENT CREDIT LIMIT.**

**Total No. of Customers:** 28

### Customers with 30% or more of Total Aging Receivables: 0

<u>Customer ID</u>	<u>Customer Name</u>
--------------------	----------------------

### Customers where 20% or more of Invoices are over 60 days: 5

<u>Customer ID</u>	<u>Customer Name</u>
JONES	JONES COMPANY
FIRSTEGY	FIRST ENERGY
SOUTH	SOUTH FREIGHT CORP
SOUTHWST	SOUTHWESTFOODSERVICES
WEATHERS	WEATHERS ENGINEERING

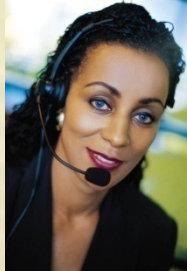
### Customers that have made no payments in the past 35 days: 6

<u>Customer ID</u>	<u>Customer Name</u>
BORISS	BORISS
CAROLINA	CAROLINA PACKAGING
CATER	CATER SERVICING
CHEROKEE	CHEROKEE LANDSCAPING
CMD	CMD
CHARLES	CHARLES CONSTRUCTION



# Online Document Repository

- ⊕ Eliminate filed hard copies
- ⊕ Automatically include all Oracle or legacy documents
- ⊕ Check Formats
  - ⊕ PCL format for live check reprints
  - ⊕ Non negotiable file copy as PDF
- ⊕ “Associate” all related documents
  - ⊕ Purchase order with A/P check



## **Customer calls: They have lost the invoice and request a copy**



### **The Paper Chase:**

Searches through paper files, copies it and sends it by fax, returns call to find customer... is in a meeting

**Total Time: 10 mins...20 mins...30...mins**



### **The repository access**

#### **DocsOnline / AutoFORM PDM user:**

Searches for original document on-line, views on the screen, then sends copy via E-mail

**Total Time: less than 2 mins!**



## View Results Online

The screenshot shows a Microsoft Internet Explorer browser window with the address bar containing the URL: <http://ral100246/F5DocsOnline/ViewDocument.asp?sn=Invoice&id=416&type=pdf>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar contains Back, Forward, Stop, Refresh, Home, Search, Favorites, and History buttons. The main content area displays the Evergreen Data Systems logo and the word "EVERGREEN" in large letters, with "DATA SYSTEMS" below it and "The ERP Output Experts" in a smaller font. To the right, the word "INVOICE" is centered above a table with three columns: CUSTOMER NO., DATE, and INVOICE NO., containing the values 123454, 09/07/01, and 00003125 respectively. Below this is a barcode. Further down, the text "BILL TO" is followed by the address: Sony Music Ltd., John Reid, 8484 Georgia Ave., Ste 350, Silver Spring, MD 20910. A "Fax No:" label is present but empty. At the bottom, a table lists items with columns for Item, Description, Quantity, Each, and Total.

Item	Description	Quantity	Each	Total
156894	CD Roy Orbison	11	10.99	120.89
457832	Floppy Disks 10 Pack	5	7.50	45.00
129105	BIC Lighter Blue	10	0.20	3.80
147101	Novelty Playing Cards	10	0.99	17.82
454047	4 Ring Binder 1 inch	20	2.49	64.74
156897	CD Eric Clapton	32	10.99	351.68
156897	CD Eric Clapton	39	10.99	428.61
156899	CD Metalica	7	10.99	76.93





# Evergreen Data Systems

- ⊕ In business for more than 23 years
- ⊕ Have provided Oracle solutions since 1993
- ⊕ Authorized Oracle Database Reseller
- ⊕ Over 3,100 Oracle applications customers



EVERGREEN  
DATA SYSTEMS

# Questions?

