IMAGENOW® DOCUMENT IMAGING FOR PEOPLESOFT ENTERPRISE 8

Perceptive Vision, Inc.
Perceptive Vision, Inc. provides document imaging, management and workflow solutions for corporate, healthcare, higher education, and governmental institutions worldwide. PVI’s products extend your existing ERP, HIS, SIS, CRM or other application suite to provide secure, digital images of paper and other electronic documents supporting your staff’s activities and business processes. PVI’s solutions can make you more efficient, more responsive, and more competitive. ImageNow®, PVI’s flagship product, is used by more than 500 companies in 10 countries, and is the foundation for a set of functionality that lets you capture, categorize, store, and retrieve any unstructured data item your business generates or receives. WebNow is PVI’s browser-based solution for use with ImageNow document imaging, management and workflow software. WebNow works with ImageNow to instantly deliver to your browser secure, digital versions of paper or other electronic documents associated with your workflow activities or application software transactions.

Integration Overview
Customers use ImageNow’s integration techniques to make their supporting documentation a single mouse-click away from any PeopleSoft Enterprise panel or page. Commonly accomplished via several non-programmatic techniques, integration is rapid, flexible, easy to implement, and easy to maintain. The technology in ImageNow allows your support team to manage the integration as you upgrade your PeopleSoft Enterprise environment from Oracle, avoiding enormous service costs or additional PVI software charges. We invite you to read on to discover how non-programmatic and programmatic integration of ImageNow with PeopleSoft Enterprise is accomplished.

ImageNow® Document Imaging for PeopleSoft Enterprise 8
PeopleSoft Enterprise integration with ImageNow can be accomplished either non-programmatically, which is the most common method customers use, or programmatically. It is critical to understand that the primary methods of integration between PeopleSoft Enterprise and ImageNow or WebNow involve a one-way transfer of data from PeopleSoft Enterprise applications to ImageNow. ImageNow does not require any new tables, objects, business rules or logic to be created in PeopleSoft Enterprise applications in order to create an interface. WebNow requires only the creation of a derived record and a limited number of new fields in order to be called directly from PeopleSoft Enterprise applications. In either case, information is not passed to PeopleSoft Enterprise, but only gathered from PeopleSoft Enterprise.
This example shows how ImageNow non-programmatically integrates with PeopleSoft Enterprise FMS, allowing users to instantly match invoices for payment approval.

The “link” between a document in the ImageNow repository and a PeopleSoft Enterprise record is based on common data. That is, the index elements in the ImageNow database that catalogue the object exactly match a data element in PeopleSoft Enterprise. This can be virtually any combination of fields in a PeopleSoft Enterprise database, but are commonly limited to things like voucher and vendor IDs, employee IDs, student IDs, expense report IDs, etc. This technical approach provides two key benefits. First, it reduces the complexity and cost commonly associated with integration, and it avoids the risk of inadvertently altering PeopleSoft Enterprise transaction logic or business rules. Secondly, it reduces the complexity and cost associated with keeping the integration in step with PeopleSoft Enterprise application upgrades.

Non-Programmatic Integration—ImageNow’s WebWalker LearnMode for PeopleSoft Enterprise 8

Using Perceptive Vision’s patented LearnMode technology, your non-technical staff can integrate a PeopleSoft Enterprise page or panel with ImageNow in minutes. Once integrated, users click an icon to index or retrieve relevant images directly from the PeopleSoft Enterprise page or panel they are viewing.
WebNow for PeopleSoft Enterprise Employee Expense Processing

This example shows how a dynamic URL allows PeopleSoft Enterprise application users to invoke WebNow to display secure, digital versions of receipts for matching against approved expenditures—dramatically speeding the reimbursement process.

The LearnMode method appropriate for most PeopleSoft Enterprise 8 environments is called WebWalker for PeopleSoft Enterprise. This is a one-way method that has ImageNow gathering data directly from the PeopleSoft Enterprise web page currently being displayed. This method has been developed specifically for PeopleSoft Enterprise 8 and allows ImageNow to be integrated with any PeopleSoft Enterprise 8 page without launching PeopleTools, writing custom code, or touching PeopleSoft Enterprise objects. There are no updates to PeopleSoft Enterprise tables using this method. The actual integration steps are simple and are commonly performed by an ImageNow Power User:

1. Access the PeopleSoft Enterprise page or panel you wish to image-enable.
2. Select the appropriate ImageNow LearnMode method.
3. Point and click to “teach” ImageNow the relevant fields on your PeopleSoft Enterprise page or panel.
Like other ImageNow LearnMode techniques, WebWalker for PeopleSoft Enterprise is popular because it is flexible, easy to implement, and requires no modifications to your PeopleSoft Enterprise environment. WebWalker for PeopleSoft Enterprise talks to Microsoft Internet Explorer, cycling through all the controls, retrieving their current values, and using those values to perform various functions. WebWalker for PeopleSoft Enterprise can also fetch source code from the page and parse it to further refine index acquisition.

**Programmatic Integration—via Dynamic URL with PeopleSoft Enterprise 8**

This method of integration between ImageNow or WebNow and PeopleSoft Enterprise is a one-way method for passing a function call and related parameters from PeopleSoft Enterprise to ImageNow or WebNow. PeopleSoft Enterprise is never updated with any data using this technique. To invoke ImageNow or WebNow from within PeopleSoft Enterprise, several simple steps are required:

1. A new derived/work record must be created to store URL values.
2. A field for each unique URL must be created in the derived record with RowInit PeopleCode to populate the field.
3. A new pushbutton, hyperlink, or other appropriate object must be added to a page, which executes the URL in the assigned field.

Because the only PeopleCode added is to the custom derived/work record field(s), updates and upgrades to the PeopleSoft Enterprise environment will not impact these objects. Customizations to PeopleSoft Enterprise delivered pages are placed in Projects for ease of reapplying after updates and upgrades to the PeopleSoft Enterprise pages. You may be required to realign objects to manage layout issues, but otherwise, reapplication should enable all the functionality in the newly updated or upgraded PeopleSoft Enterprise environment without additional work.

**Programmatic Integration—between ImageNow and PeopleSoft Enterprise Tables**

This method of integration between ImageNow and PeopleSoft Enterprise, which utilizes the ImageNow iScript Scripting Engine, is a two-way method for passing data back and forth between the applications. It is normally used in conjunction with ImageNow workflow to message PeopleSoft Enterprise that some ImageNow event has occurred, or to determine a value within a PeopleSoft Enterprise table to use in an ImageNow workflow process.

**Availability**

ImageNow document imaging and workflow software is available from Perceptive Vision, Inc. For more information, call 1 800 941 7460 or E-mail info@imagenow.com.
Support
The ImageNow, PeopleSoft Enterprise integration is fully supported by Perceptive Vision, Inc. For support, call 1 800 941 7460 or e-mail support@imagenow.com.

Validation Environment

Hardware: Sun
Software: PeopleTools 8.41, PeopleSoft Enterprise FMS 8.4, ImageNow 5.1 and 5.2
Database Platform: Oracle 8.1.7
Operating System: SunOS 5.8

For additional information about partnering with Oracle, please contact us at opninfo_us@oracle.com or visit us at www.partners.oracle.com.