

JetForm® Output Pak™ for Oracle® E-Business Suite

White Paper

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Business Documents: Key Customer Communication Tools

Customers interact with organizations in many different ways, including sales, customer service representatives and Web sites. Yet, the most frequent point of contact or touchpoint a customer has with any organization is through documents. In fact, in many cases, documents are the only contact customers have with an organization.

Consider how frequently your organization's customers receive order confirmations, invoices and shipping documents. Then consider how those documents reflect your organization. They may provide your customers, partners and suppliers with the information they need, but do they do it in a clean, professional and sophisticated way? Do they result in repeat business or provide opportunities to market other products or services?

E-business has knocked down barriers, creating a worldwide playing field for doing business. Organizations have a global reach like never before. As a result documents must be created and delivered around the globe, they must meet a variety of local requirements and may have to be produced in multiple languages.

To manage in this environment, many companies have discovered the importance of integrating diverse business processes with the data that drives their operations via a system like Oracle E-Business Suite™. However, documents generated from an ERP/CRM system like Oracle E-Business Suite are often report-like in their appearance and very difficult to change.

Unlocking the document-generation potential from Oracle E-Business Suite with JetForm

JetForm is a global leader in business process automation solutions, which includes the automated generation of customer-focused document output.

Output Pak™ for Oracle® E-Business Suite, part of the JetForm® family of e-Document Presentment solutions, is an Oracle CAI certified interface solution that extends the scope of Oracle Business Suite — enabling organizations to easily create high-quality electronic documents.

The JetForm solution is a flexible, fast and cost-effective way for organizations to dynamically generate easy-to-read, professional and personalized documents from their Oracle E-Business Suite system for delivery to customers via multiple delivery channels.

With Output Pak for Oracle E-Business Suite, any organization can manage document output on a global scale, while maintaining their corporate image with easy-to-understand customer touchpoint documents.

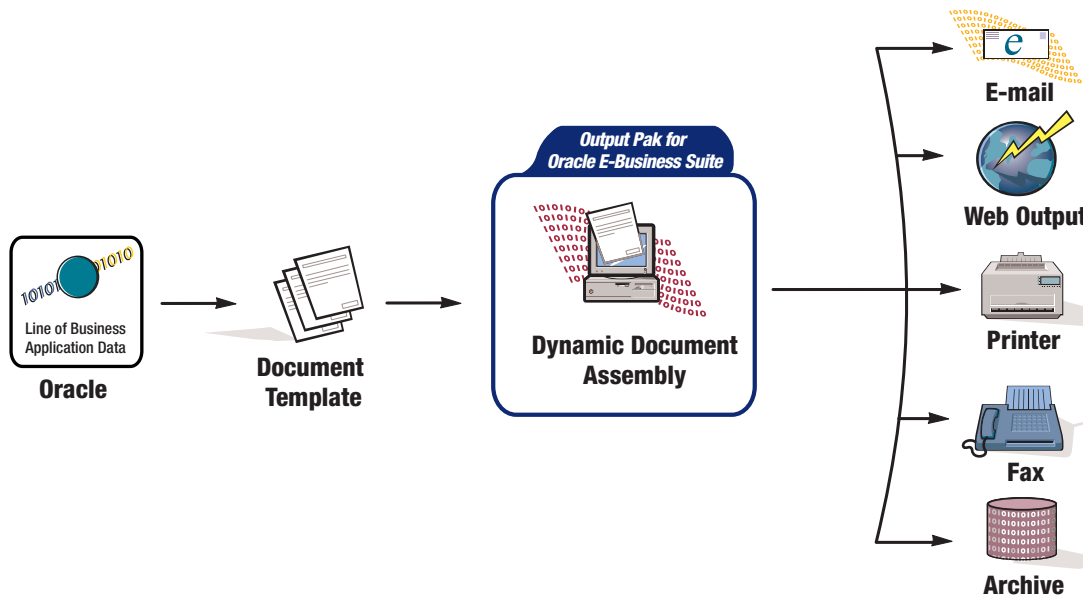


Figure 1: JetForm's e-Document Presentation Solution for Oracle E-Business Suite merges Oracle data with a document template for delivery via multiple delivery channels

Why would I use JetForm Output Pak for Oracle E-Business Suite?

Reinforce corporate image with customer touchpoint documents

Ensure your corporate image standards are properly portrayed in your touchpoint documents. Send your customers professional-looking, high-quality documents that incorporate complex design elements such as graphics, colors and custom fonts. Easy-to-read documents make customers act and provide the opportunity to upsell additional products or services.

Reduce costs associated with Oracle Reports programming or preprinted documents

Minimize costs associated with custom programming and managing preprinted forms inventories with JetForm Output Pak for Oracle E-Business Suite. Creating electronic document templates using JetForm's easy-to-use template design tool means your programming effort is minimized—giving you the ability to create and maintain the quality documents your business demands. As a result, document template changes can be implemented quickly and easily.

Increase customer retention through personalization

Happy customers remain customers. And your customers appreciate receiving relevant information from you in an easy-to-understand format. JetForm Output Pak for Oracle E-Business Suite allows you to customize the information contained in business documents—to satisfy specific customer preferences or to include information for upsell opportunities.

Accelerate e-business initiatives with dynamic document output in multiple formats

JetForm Output Pak for Oracle E-Business Suite enables your organization to present meaningful, dynamically-generated documents in a variety of formats using multiple delivery options such as print, e-mail, fax and the Web.

Faster and more flexible document output

JetForm print drivers are typically twice as fast as operating system print drivers. Customers with heavy printing needs will appreciate the print speed when generating high-volume output. A wide variety of native print drivers are available including support for common workgroup printers, modern production printers, highlight color, full color and thermal transfer label printers.

How does JetForm Output Pak for Oracle E-Business Suite work?

The JetForm Output Pak for Oracle E-Business Suite provides you with a complete document-design and output solution that easily integrates with Oracle E-Business Suite.

Oracle E-Business Suite provides many standard reports. Although functional, these reports are rudimentary in nature. They generate data in overlay format, which must be used in conjunction with preprinted forms or custom programming to present your desired corporate image. Preprinted forms and custom programming are expensive to maintain, source and manage.

Before: Standard Oracle E-Business Suite Reports generate data in overlay format for use on preprinted form (landscape only)

The screenshot shows a standard Oracle E-Business Suite report. It features a preprinted form with a header section containing company information and a main body with a table of data. The data is presented in an overlay format, where the report content is superimposed on the preprinted form's layout. The table has multiple columns and rows of data, typical of a financial or operational report.

After: JetForm combines data and formatting to generate professional looking documents for any laser printer, for e-mail, fax or Web (portrait or landscape)

The screenshot displays a professional-looking invoice generated by JetForm. The layout is clean and organized, with a clear header section for the invoice number, date, and terms. The main body contains a detailed table of items, including descriptions, quantities, and prices. The footer section includes a summary of the total amount due, taxes, and other relevant information. The overall design is modern and easy to read, suitable for professional use.

Oracle Reports has excellent functionality for defining the extraction of data from Oracle E-Business Suite. It is however not focused on meeting your document formatting needs. The Output Pak works in conjunction with Oracle Reports, extending its capabilities and enabling you to generate high-quality customer touchpoint documents such as invoices, purchase orders and sales orders. The formatting of these documents goes far beyond anything Oracle Reports can produce.

JetForm Output Pak does not alter how an end user generates reports. Users continue to use the same familiar interface to submit reports for printing. JetForm Output Pak simply redirects the data extracted by the report run, formats it and prints it as per the user's request. This significantly reduces the need for extensive end-user training, simplifying your rollout planning.

The Importance of XML

Oracle Reports is part of the technology stack of Oracle E-Business Suite and is also an integral part of the JetForm solution. Oracle E-Business Suite can produce output in Oracle XML data format rather than generating overlay formatted output. This allows JetForm to take the XML data and merge it with professionally formatted document templates that are created using JetForm's easy-to-use template designer. XML has been embraced by most industry players including Oracle Corporation and is fast becoming the recognized standard for data interchange. XML is unique in that it defines the data element name or tag, as well as each tag's associated value in structured pairs. Oracle's XML in no way attempts to define the formatting of a document, only the document's data content and data structure.

The following sample XML data elements define the following address.

1000 Main Street, Springfield, IL, 12345, USA

```
<?xml version="1.0" encoding="latin1"?>
<address>
  <street>1000 Main Street</street>
  <city>Springfield</city>
  <state>IL</state>
  <zip>12345</zip>
  <country>USA</country>
</address>
```

Because the XML meta information is automatically generated by Oracle Reports at runtime, all reports, whether created by Oracle or by a third party, generate a complete XML description of all the data used to generate the report. This allows seamless and dependable integration of the Output Pak with Oracle Reports.

Formatting Documents

With the JetForm Output Pak for Oracle E-Business Suite you are no longer required to incorporate document formatting directly within Oracle Reports. If the position of specific data on a document needs to move, no changes are required in the report itself. Report changes are only necessary if additional data elements need to be added. Using the Output Pak's WYSIWYG (what-you-see-is-what-you-get) document template design capabilities, you can move field objects by selecting and dragging them to their new location using the mouse. These fields can be placed anywhere on a document's page and can be presented multiple times on the same document, with only one occurrence of the data appearing in the report.

Page size, font type and size, spacing of form elements, text justification, shading, lines, boxes (including rounded corner boxes), logos and bar codes are all specified graphically within the template itself—the formatting is independent of the data extraction process.

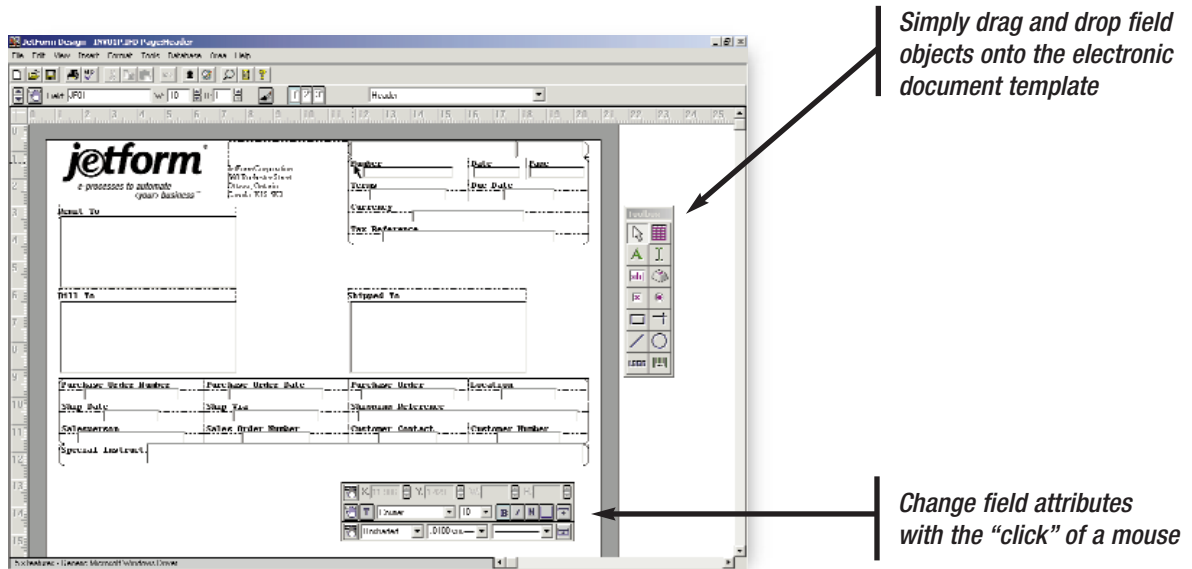


Figure 2. JetForm Design — an easy-to-use WYSIWYG electronic document template creation tool

JetForm's powerful, dynamic subforms feature enables the look and feel of each document to be controlled intelligently by the data. With dynamic subforms, market-focused, business documents can be personalized to satisfy specific customer preferences and your upsell strategies. For example, add a tailored message based on customer information. Dynamic subforms are also used to allocate the exact amount of space required on a document to accommodate repeating information. The document grows to accommodate the exact number of line items, using the minimum number of pages required while maintaining a quality presentation. For instance, the same invoice template is used to print an invoice with 3 or 150 line items — a vast improvement over the cumbersome and wasteful one-size-fits-all presentation provided by inflexible preprinted form stock. Dynamic subforms also allow "free text" areas on documents like invoices, sales orders and purchase orders to grow and shrink as required by the amount of text in the data.

JetForm Output Pak contains a set of commonly used, predesigned document templates with a consistent look and feel, that work out-of-the-box with Oracle E-Business Suite. These templates can be implemented with only minimal changes to your Oracle application or its existing reports. Document templates not included in the Output Pak can be created using a component of the solution called Form Builder.

The Form Builder reads an existing Oracle Report and produces a document template that matches the data provided by the Report. Using JetForm's graphical design tool, you format the template to match your document requirements. The end result is a compiled template that is ready for deployment.

At runtime, the XML data from Oracle E-Business Suite and the JetForm document templates are merged together to create the final document output. Additional functions may also be performed on the data. For instance, advanced users can develop document templates to perform calculations such as +, -, *, /, **, log, ln, abs, exp, floor, frac, int, round, sqrt and trunc, providing the ability to calculate running totals or add calculated fields to a template without changing the Oracle Report.

Processing Steps for Generating Output

The processing steps involved in generating documents from Oracle E-Business Suite are illustrated in Figure 3.

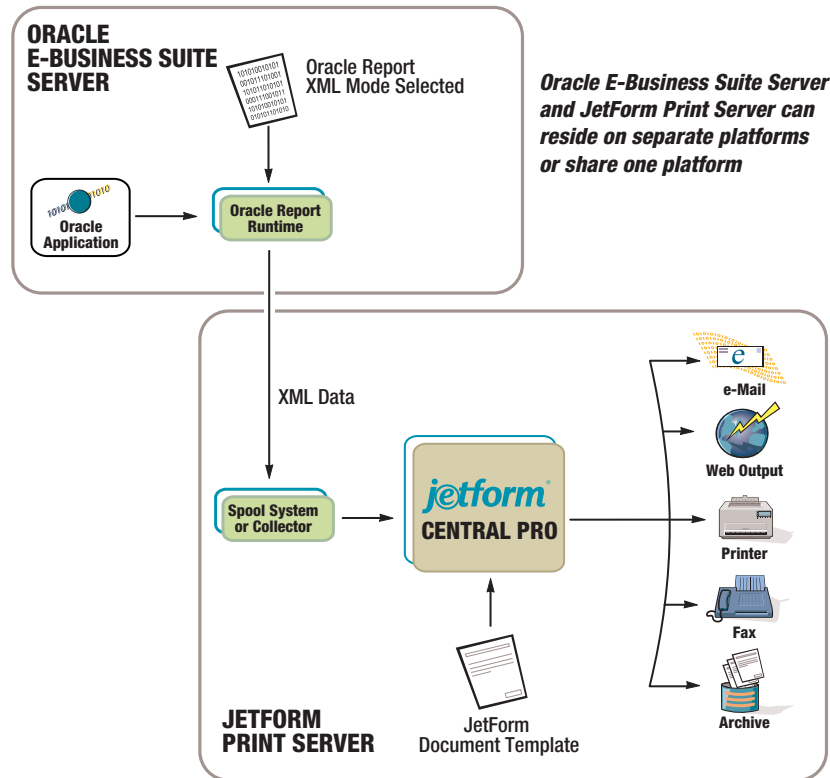


Figure 3: Document Output Processing Steps Using JetForm

- The user requests that a report be run to generate one or more documents.
- Oracle E-Business Suite Reports' runtime executes and creates an XML data output.
- The output is sent directly to JetForm Central Pro™ via a shared directory or via the host spool system to a print queue configured to send the XML data to Central Pro.
- Central Pro converts the Oracle XML format to a JetForm usable format using an XSLT script.
- Central Pro assembles the final document by taking the data from Oracle and merging it with the document template. XML field tags map directly to the field names on the template.
- Central Pro outputs the document via the delivery mechanism required: printer, fax, e-mail or the Web.

Components of JetForm Output Pak for Oracle E-Business Suite

The Output Pak for Oracle E-Business Suite is an innovative document output solution comprised of several key technology components:

- **JetForm Design™** — JetForm Design is a comprehensive WYSIWYG graphical design tool that creates electronic replicas of paper documents. The user can easily design documents that contain graphical design elements such as company logos, boxes, shading and bar codes, customizing the format of the data being presented. Easy-to-use tools such as user-defined grids allow for precise placement of graphics and text. Full font support is provided, as well as reversed (white on black), colored and rotated text. Document templates developed with JetForm Design are merged with data from Oracle E-Business Suite using JetForm Central Pro.
- **Form Builder** — The Form Builder allows JetForm Design to take an existing Oracle Report and create an initial JetForm document template design and matching XSLT script for XML conversion. The template created contains the fields from the original Oracle Report, with the correct tag/field name and length organized into logical groupings. The XSLT is the script used to convert the Oracle Reports' XML output to XML usable by JetForm. Field tag names in the Oracle Reports' XML output, the XSLT and the JetForm document template all match, providing the user with a head start in developing new JetForm document templates from existing or new Oracle Reports.
- **JetForm Central Pro** — JetForm Central Pro is a powerful server-based application that allows organizations to produce high-quality output. JetForm Central Pro merges data from Oracle E-Business Suite with an electronic document template created using JetForm Design. The resulting document is then delivered via print, fax, e-mail or the Web. JetForm Central Pro is a multi-platform product that runs under a variety of operating systems.
- **JetForm Document Templates for Oracle E-Business Suite** — JetForm has created a set of document templates that address the most commonly used Oracle reports. Most document templates are configured to provide page n of m style page numbering on each page and are provided in both landscape and portrait orientations. These document templates offer a consistent look and feel out-of-the-box, customizable simply by adding your company logo and address. These document templates are easily modified to address your specific business needs and represent a sample set that your development staff can use to understand advanced document-development techniques. The following table lists the ready-to-use document templates provided.

Document Template Name	Oracle Application	Module Portrait/Landscape	Orientation Page n of m processing
Invoice	Accounts Receivable	P + L	Yes
Invoice—Credit Memo	Accounts Receivable	P + L	Yes
Invoice—Debit Memo	Accounts Receivable	P + L	Yes
Dunning Letter	Accounts Receivable	P	Yes
Commercial Invoice	Order Management	L	Yes
Purchase Order (PO)	Purchasing	P + L	Yes
Request for Quotation (RFQ)	Purchasing	P + L	Yes
Sales Order Acknowledgment	Order Management	L	Yes
Check	Accounts Payable	P	No
Bill of Lading	Order Management	P	Yes

Note:

- All templates listed above are provided in English and are available in Letter and A4 sizes.
- All templates include a matching XSLT transformation script for translating Oracle XML into a JetForm readable format.
- Job management steps for each of the above forms are provided and installed into JetForm Central Pro's Job Management Database. These steps provide appropriate print processing for each of the above documents and serve as models for additional templates.
- **Connectivity Components** — The Output Pak contains the components required to integrate Oracle E-Business Suite with JetForm technology. A tool is provided to intercept and deliver Oracle Reports XML output to the JetForm solution via a shared directory or a print queue (Oracle Send Utility). A conversion tool is provided to convert Oracle XML into JetForm-readable XML through the use of an industry standard XSLT translation engine (XML Import). A print queue capture tool is included to capture XML streams sent by the Oracle Send Utility via a print queue and to provide them to JetForm Central Pro (Print Queue Processor).
- **Installation Routines** — Enables you to automatically install and configure JetForm Design, JetForm Central Pro, Form Builder, the prebuilt document templates and other components of the JetForm Output Pak in your environment.

Key Features and Benefits

Feature	Benefit
Easy-to-use WYSIWYG document template design tool	Powerful and feature-rich design tool — makes template changes quick and easy
Extensive document template processing capabilities (graphics, boxes, logos, watermarks, flexible field placement, font control, barcodes, rotated text and calculated fields)	Create high quality, professional-looking documents eliminating the need for preprinted forms Replicate complex regulatory compliant documents
Generates data values anywhere on a document, e.g. “amount due” at top and bottom of the page.	Create flexible documents that support your business requirements
Intelligent dynamic documents — look and feel of the document is dynamically controlled by the data	Create personalized messages on customer documents — dynamic documents grow to accommodate data
Bar code printing capability	Print a range of bar codes on any laser printer with no special hardware required Bar codes can be fixed on the document template or represent variable data merged onto the template
Extensive language support	Print documents in such languages as English, French, German, Swedish, Spanish, Italian, Finnish, Norwegian, Danish, and Brazilian Portuguese, as well as Czech, Polish, Hungarian, Russian, Simplified Chinese, Traditional Chinese, Korean and Japanese
Flexible deployment options	Deliver documents worldwide while maintaining your corporate image Customize and output documents in different countries or at subsidiaries with different logos or terms and conditions
Generates multiple documents in multiple formats based on one data stream	Generate a variety of documents at the same time from one report execution using the same data formatted in different ways
Produce high-fidelity output in multiple formats to multiple output devices; print, fax, e-mail, PDF, and the Web	Output Pak accommodates output requirements of a paper-Web world, leveraging multiple output channels to communicate with customers

Wide array of print drivers supporting virtually all PostScript and PCL laser printers including Hewlett-Packard, Xerox, Canon, Lexmark, Kyocera and Tektronix Includes support for full color and highlight color, as well as support for common label printers, Zebra, Datamax, Intemec and TEC	Output Pak integrates with existing hardware and supports production-level output requirements
Supports printer features such as duplexing, tray selection, flash RAM and hard disks	Leverage existing hardware, reduce network traffic, address demanding print solution needs
Supports a wide variety of fax servers: AIFP HostFax, OmTool Fax Sr., Teubner & Assoc. FaxGate, V-Systems VSI-FAX, Top Call, RightFax, Faxination and Merkur	Leverage existing fax infrastructure — JetForm does not demand use of proprietary fax server software
Enables calculations on the data stream including +, -, *, /, **, log, ln, abs, exp, floor, frac, int, round, sqrt and trunc	Create new fields such as running totals without changing the Oracle Report
Create custom document templates using the Form Builder and JetForm Design	Save time and money — eliminates the need to create new forms from scratch
Connectivity components for out-of-the-box integration with Oracle E-Business Suite.	Get up and running fast with the Output Pak — no need to experiment and fuss with system integration

System Requirements

The JetForm Output Pak for Oracle E-Business Suite runs on a wide variety of platforms. As indicated below, support for Oracle E-Business Suite is extended to additional platforms through deployment of the JetForm solution on a separate supported platform.

Output Pak Operating Systems Supported:

Microsoft Windows NT/Windows 2000

Sun Solaris

HP-UX 11.0 (64 bit)

Linux (Red Hat 6.2)

Oracle E-Business Suite — Additional Operating Systems Supported:

IBM AIX

Compaq Tru 64

HP-UX 11.0 (32 bit)

JetForm Design

Microsoft Windows NT/Windows 2000

About JetForm

JetForm Corporation (NASDAQ: FORM, TSE: JFM) makes Web-based software solutions that automate business processes and transform them into “e-processes.” JetForm enables companies and government to operate efficiently and effectively, to grow revenues, lower operating costs and reduce cycle times. The company’s strength is in intelligent XML forms, process automation and customer-focused document output. With operations in 11 countries, and a global network of partners, JetForm is uniquely positioned to address the needs of international business. For more information, visit www.jetform.com.

JetForm Corporation is a certified member of the Oracle Cooperative Applications Initiative (CAI) and is a corporate member of the Oracle Applications User Group (OAUG). Look for information about JetForm solutions and services at any of the worldwide OAUG conferences.



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About JetForm Corporation

NASDAQ: FORM TSE: JFM. JetForm Corporation makes Web-based software solutions that automate business processes and transform them into "e-processes." JetForm enables companies and government to operate efficiently and effectively, to grow revenues, lower operating costs and reduce cycle times. Our strength is in intelligent XML forms, process automation and customer-focused document output. With operations in 11 countries and a global network of partners, JetForm is uniquely positioned to address the needs of international business.

JetForm's professional services team offers an integrated services program that ensures your success with JetForm technology. Services include: Systems Analysis, Design, Development and Integration, Training and Support. For more details about JetForm's Services Program, phone (613) 751-4884 or e-mail servops@jetform.com.

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