



Migrations

PSIcapture Line of Business Application Migrations

INTEGRATE YOUR CAPTURE SOLUTION WITH A LINE OF BUSINESS SYSTEM

PSIcapture has the ability to migrate documents and data into virtually any document management system. However, PSIcapture does not typically migrate directly to the Line Of Business applications commonly used by accounting departments, such as Microsoft Dynamics, SalesForce, SAP, Oracle Financials and Quickbooks. PSIcapture does not lack the ability to migrate captured information to your system, it simply means that you will have to export your data in order to migrate it in the event that the third-party software does not provide the option for a direct migration.

Below we have outlined three options for migrating your data into your third-party system. These options should only have a minor impact on the PSIGEN configuration, but there may be costs incurred from your software system provider.

Option 1: Staging Database

If the target third-party system uses a relational database such as Microsoft SQL, Oracle or IBM DB2, PSIcapture configuration can allow the data to be written to a staging database—essentially another instance of SQL or Oracle. From there, the system's administrators can create a Stored Procedure to import the data under their schedule and control. This will limit the risk of corrupting the production databases for PSIcapture and the third party system, while providing the system administrator with governance of the data import.

Option 2: Text File

PSIcapture can also publish a text file containing tabular data in the form of a text file into a specified directory. The text file can be configured to export with multiple variances such as defining the text delimiter, file delimiter, text qualifier and the output file extension (such as CSV.) If the third-party system has an import process, it can initiate the data import from this type of file. Alternatively, if the third party system has an executable (.exe) file, PSIcapture can initiate the process upon completing the text file creation.

Option 3: XML File

Similar to Option 2, PSIcapture has the ability to create an XML output file into a specified directory. If the third party system has an import process, it can initiate the data import from this type of file. If the system has an executable (.exe) file, PSIcapture can initiate the process upon completing the XML file creation. PSIcapture can leverage an XSLT file when producing an XML file. Three example XML format options are on the following pages.



Migrations

XML Standard Format 1

```
=====
== XML Standard Format 1 Sample ==
=====

<batch BatchName="20100308.171105">
  <document PONO="990003" PODate="3/5/2010" Vendor="Nolan Hardware and Supplies"
    Amount="$500.00">
    <files>
      <file path="C:\Migration Output\XML\990003.tif" />
      <file path="C:\Migration Output\XML\990003.pdf" />
    </files>
  </document>
  <document PONO="990004" PODate="3/7/2010" Vendor="Willis Orchards" Amount="$257.45">
    <files>
      <file path="C:\Migration Output\XML\990004.tif" />
      <file path="C:\Migration Output\XML\990004.pdf" />
    </files>
  </document>
</batch>
```



Migrations

XML Standard Format 2

```
=====
== XML Standard Format 2 Sample ==
=====

<Batch BatchID="1021" BatchName="20100308.171105">
  <Document DocumentType="Purchase Orders">
    <Fields>
      <Field FieldName="PONO">990003</Field>
      <Field FieldName="PODate">3/5/2010</Field>
      <Field FieldName="Vendor">Nolan Hardware and Supplies</Field>
      <Field FieldName="Amount">$500.00</Field>
    </Fields>
    <Files>
      <File>C:\Migration Output\XML\990003.tif</File>
      <File>C:\Migration Output\XML\990003.pdf</File>
    </Files>
  </Document>
  <Document DocumentType="Purchase Orders">
    <Fields>
      <Field FieldName="PONO">990004</Field>
      <Field FieldName="PODate">3/7/2010</Field>
      <Field FieldName="Vendor">Willis Orchards</Field>
      <Field FieldName="Amount">$257.45</Field>
    </Fields>
    <Files>
      <File>C:\Migration Output\XML\990004.tif</File>
      <File>C:\Migration Output\XML\990004.pdf</File>
    </Files>
  </Document>
</Batch>
```



Migrations

XML Standard Format 3

```
=====
== XML Standard Format 3 Sample ==
=====

<Batch BatchID="1021" BatchName="20100308.171105">
  <Document DocumentType="Purchase Orders">
    <Records>
      <Record>
        <Field FieldName="PONO">990003</Field>
        <Field FieldName="PODate">3/5/2010</Field>
        <Field FieldName="Vendor">Nolan Hardware and Supplies</Field>
        <Field FieldName="Amount">$500.00</Field>
        <Field FieldName="LineItem">Doorknobs</Field>
      </Record>
      <Record>
        <Field FieldName="PONO">990003</Field>
        <Field FieldName="PODate">3/5/2010</Field>
        <Field FieldName="Vendor">Nolan Hardware and Supplies</Field>
        <Field FieldName="Amount">$500.00</Field>
        <Field FieldName="LineItem">Labor</Field>
      </Record>
    </Records>
    <Files>
      <File>C:\Migration Output\XML\990003.tif</File>
      <File>C:\Migration Output\XML\990003.pdf</File>
    </Files>
  </Document>
  <Document DocumentType="Purchase Orders">
    <Records>
      <Record>
        <Field FieldName="PONO">990004</Field>
        <Field FieldName="PODate">3/7/2010</Field>
        <Field FieldName="Vendor">Willis Orchards</Field>
        <Field FieldName="Amount">$257.45</Field>
        <Field FieldName="LineItem">Apple trees</Field>
      </Record>
    </Records>
    <Files>
      <File>C:\Migration Output\XML\990004.tif</File>
      <File>C:\Migration Output\XML\990004.pdf</File>
    </Files>
  </Document>
</Batch>
```