Oracle® Cloud

Create Invoices in Oracle ERP Cloud Using OCI Document Understanding AI Service

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Preface

This document describes how to install, configure, and run this recipe in Oracle Integration 3.

Topics:

- Documentation Accessibility
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Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc`.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info` or visit `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs` if you are hearing impaired.

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Related Resources

For more information, see these Oracle resources:

- Oracle Integration documentation on the Oracle Help Center.
- Oracle Cloud at `http://cloud.oracle.com`.

Conventions

The following text conventions are used in this document.

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.

Convention	Meaning
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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About This Recipe

Use this recipe to create invoices in Oracle ERP Cloud using the artificial intelligence capabilities of Oracle Cloud Infrastructure Document Understanding (OCI Document Understanding).

> ✎ **Note:**
>
> This recipe is available as **OCI Document Understanding — Oracle ERP Cloud | Create Invoices** in Oracle Integration. Oracle provides this recipe as a sample only. The recipe is meant only for guidance, and is not warranted to be error-free. No support is provided for this recipe.

Overview

This recipe uses the artificial intelligence capabilities of OCI Document Understanding to automatically extract and process information from invoices received as PDF file attachments in Gmail and create corresponding invoices in Oracle ERP Cloud.

To use the recipe, you must install the recipe and configure the connection and other resources within it. The main integration flow runs on a schedule. It fetches invoice PDF files that are received as attachments from a Gmail inbox and then encodes the PDF files to base64 in Oracle Integration. Subsequently, it invokes the child integration. The child integration flow sends the base64 encoded files to OCI Document Understanding. Using the artificial intelligence capabilities of OCI Document Understanding, key value data is extracted from the files and the results are stored in JSON format. Finally, corresponding invoices are created in Oracle ERP Cloud via REST API calls.

Note that to successfully run this recipe, the input PDF files that you receive in Gmail have to be in a certain format. You can download the following file for reference: Sample file.

System and Access Requirements

- Oracle Integration, Version 24.06 or higher
- OCI Document Understanding
- A valid account on Google Gmail
- Oracle ERP Cloud
- An account on Oracle ERP Cloud with the Administrator role

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Before You Install the Recipe

You must perform the following configuration tasks on Gmail, Oracle ERP Cloud and OCI Document Understanding in order to successfully connect to these external systems using Oracle Integration and create invoices in Oracle ERP Cloud.

Configure Gmail

You must perform the general configuration tasks for creating a connection. See Prerequisites for Creating a Connection.

Configure Oracle ERP Cloud

To access the Oracle ERP Cloud instance from Oracle Integration, you'll require a separate user account on Oracle ERP Cloud.

Log in to your Oracle ERP Cloud instance as an Administrator and perform the following tasks.

1. Create a user account for Oracle Integration. Make a note of the user name and password you set for the account. You'll use the credentials of this user account to connect to Oracle ERP Cloud from Oracle Integration.

2. Assign required roles to the user account. For more information on the roles, see Assign Required Roles to an Integration User.

Configure Document Understanding Invoke

Configure and apply policies at the compartment level for Document Understanding users. See **Apply a policy to grant MANAGE permisission** in Policy to Grant Users Access to Document Understanding APIs.

Ensure that you select the same OCI compartment (where you applied the Document Understanding policies) when you configure the integration flow of the recipe to use the Document Understanding native action in Configure the Integration Flow.

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Install and Configure the Recipe

On your Oracle Integration instance, install the recipe to deploy and configure the integration and associated resources.

1. On the Oracle Integration Home page, in the **Get started** section, click **Browse store**.

2. Find the recipe you want to install, then click **Get**.

   A message confirms that the recipe was successfully installed, and the recipe card shows **In use**.

3. Click **Configure** ⚙ on the recipe to configure its resources.

   The project workspace opens, displaying all the resources of the recipe. Configure the following resources before you activate and run the recipe.

Configure the Oracle Gmail Connection

1. In the Connections section, click the connection name.

2. In the Security section, enter the following details:

Field	Information to Enter
Security Policy	By default, **Google OAuth Authorization Code Credentials** is selected.
Client ID	Enter the client Id. See Configure Gmail.
Client Secret	Enter the client secret.
Scope	Select a scope from the drop-down list. For example, `https://mail.google.com/`

3. Click **Provide Consent**.

   In the resulting screen, give your consent. Once consent is given, a successful consent page is displayed.

4. On the connection window, click **Save**. If prompted, click **Save** again.

5. Click **Test** to ensure that your connection is successfully configured. In the resulting dialog, click **Test** again.

   A message confirms if your test is successful.

6. To return to the project workspace, click **Go back** ◀.

Configure the Oracle ERP Cloud Connection

1. In the Connections section, click the connection name.

2. In the Properties section, enter the Oracle ERP Cloud host name. For example: `https://your_domain_name.fa.DC.oraclecloud.com`.

3. In the Security section, enter the following details:

Field	Information to Enter
Security Policy	Select **Username Password Token**.
Username	Enter the username of the account created for Oracle Integration on Oracle ERP Cloud. See Configure Oracle ERP Cloud.
Password	Enter the password of the account created for Oracle Integration on Oracle ERP Cloud.

4. Click **Save**. If prompted, click **Save** again.

5. Click **Test** to ensure that your connection is successfully configured. In the resulting dialog, click **Test** again.

   A message confirms if your test is successful.

6. To return to the project workspace, click **Go back** .

Configure the Oracle REST Trigger Connection

1. In the Connections section, click the connection name.

2. Click **Test** to ensure that your connection is successfully configured. In the resulting dialog, click **Test** again.

   A message confirms if your test is successful.

3. Click **Save**. If prompted, click **Save** again.

4. To return to the project workspace, click **Go back** .

Configure the Integration Flow

Edit the **Oracle PDF Invoice Create** integration flow to configure the document understanding action.

To know more about the document understanding action, see Extract Document Information with a Document Understanding Action in *Using Integrations in Oracle Integration 3*.

1. In the Integrations section, click the integration flow name.

2. On the integration canvas, click the **Document Understanding** element, and then click **Actions** and select **Edit**.

3. Click **Next** and select the OCI compartment.

4. Click **Next** and then **Done**.

5. Click **Save** to save the integration.

6. To return to the project workspace, click **Go back** .

Configure the Lookup Table

Edit the **Generic_Properties** lookup table and enter appropriate values.

1. In the Lookups section, click the lookup name.

2. Enter appropriate values against each of the following properties.

PropertyName	PropertyValue
FromAddress	Enter the email address from which notification emails have to be sent in case of errors or failures.
ToAddress	Enter the email address to which notification emails have to be sent in case of errors or failures.

3. Click **Save**. If prompted, click **Save** again.

4. To return to the project workspace, click **Go back** .

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Activate and Run the Recipe

After you've configured the connections and other resources, you can activate and run the recipe.

1. In the project workspace, click **Activate**. In the Activate project panel, with the default project deployment selected, choose an appropriate tracing option, then click **Activate**.

   A message confirms that the integration has been activated. Refresh the page to view the updated status of the integration.

2. Run the recipe.

   a. In the Integrations section of the project workspace, click **Actions** ••• on the **Oracle Invoice PDF Processing Scheduler** integration flow, then select **Run**.

   The Configure and run page is displayed, where you can specify a value for the `lastRun` parameter. This parameter stores the date of the most-recent successful run of the integration flow. For the initial run, it contains a default value. The parameter's value is automatically updated after each successful run, and only the invoices received after the date stored as the parameter's **Current Value** are processed by the integration in each run. If you want to change the date for a specific scenario, enter the date of your choice in the **New Value** field in the format, `yyyy-MM-dd`.

   b. On the Configure and run page, click **Run**.

   You've now successfully submitted the integration for execution.

   > ✎ **Note:**
   >
   > You can also schedule this integration to run at a date, time, and frequency of your choosing. See Define the Integration Schedule.

3. Monitor the running of the integration flow in Oracle Integration.

   a. In the project workspace, click **Observe**. You'll see the integration flow being triggered and running successfully.

   b. To manage errors in your project, see Manage Errors in a Project.

4. Log in to your Oracle ERP Cloud instance and check for the new invoices created.

Related Documentation

- *Using the Google Gmail Adapter with Oracle Integration 3*
- *Using the Oracle ERP Cloud Adapter with Oracle Integration 3*
- *Using the REST Adapter with Oracle Integration 3*
- *Oracle Cloud Infrastructure Document Understanding*