
Report bursting and report distribution

Abstract

The scope of this document is to present some advanced report distribution scenarios and what is the *DocumentBurster* approach for achieving those requirements.

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Introduction

DocumentBurster splits up reports and documents like statements, purchase orders and invoices, reports which are usually generated by applications such as Crystal Reports, SAP, PeopleSoft and Oracle. The generated burst reports are then automatically distributed to various destinations which can be email, Share-Point portal, FTP, fax or SMS messages.

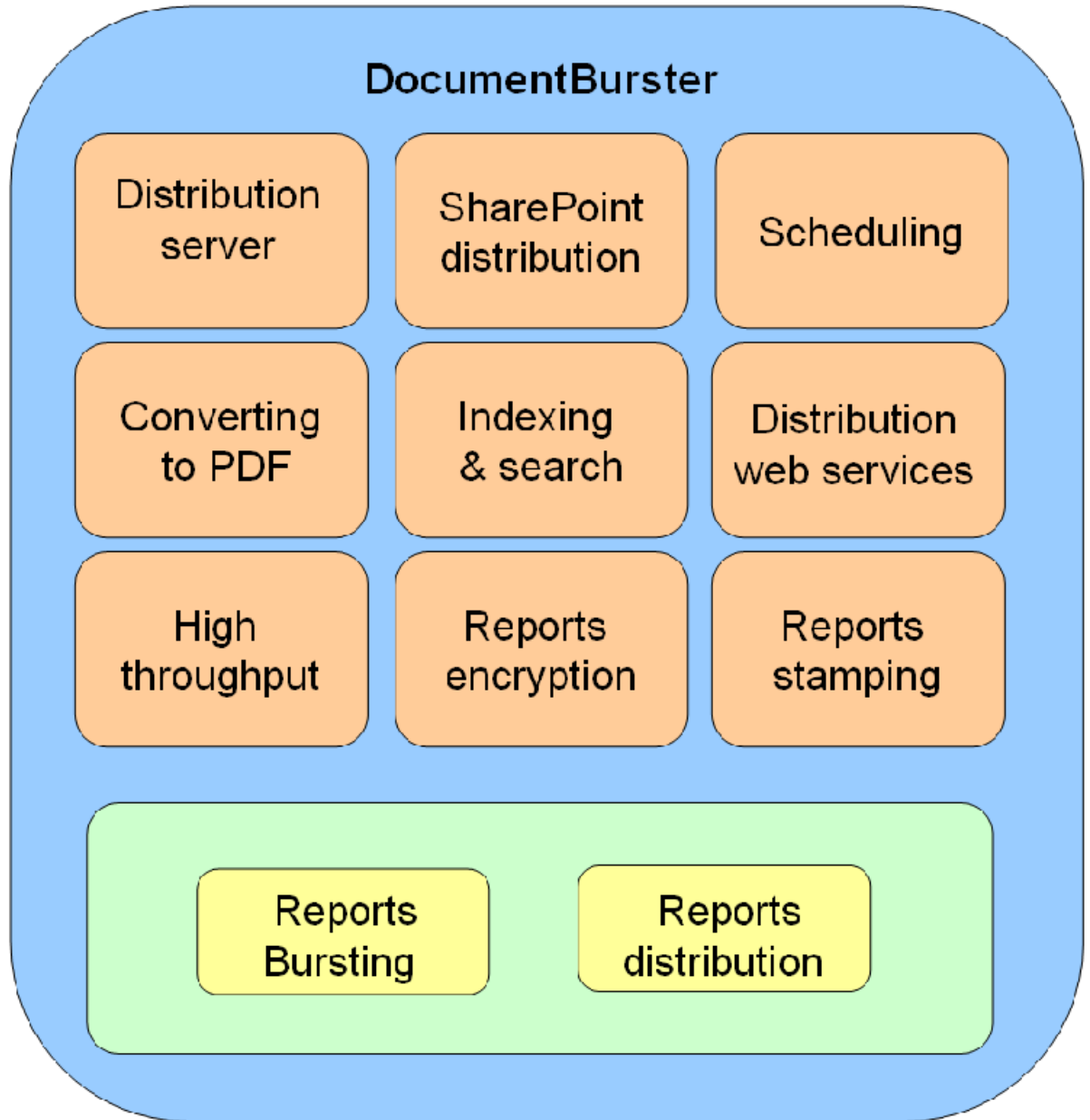
External applications can send **burst** commands to *DocumentBurster* for a single report or for a batch of reports which are all coming together. *DocumentBurster* extracts from the incoming reports information like email address or invoice number in order to properly burst and deliver the relevant reports to the proper destination.

DocumentBurster has good report bursting, merging and distributing capabilities. This should be enough when you just start with reports distribution and you usually have only few reports to burst and distribute monthly. However, if you have more serious reports distribution scenarios, if you are looking for a complete automated process, if you need advanced scheduling capabilities, if you have a big number of huge reports to be distributed to hundreds or even thousands of customers - in such cases you might be interested in a tailored version of *DocumentBurster*.

DocumentBurster modules

DocumentBurster is a modular system. For each of the main supported usage scenarios there is a separate independent module which implements the specific functionality.

Following picture presents the main areas of *DocumentBurster*.



DocumentBurster modules

Personalized email messages

DocumentBurster has support to send both plain text emails and HTML based emails to your clients.

One interesting feature is the possibility to define email templates based on which you can send customized messages to each of your partners.

For example the following can be an email template:

Dear **\$customername\$**,

Attached you can find the invoice for the month of **\$month\$**.

Regards,
Peter

\$customername\$ and **\$month\$** are the variables which will be replaced with the relevant real values when the report is being distributed.

This feature is interesting since it allows to define only few email templates which can be used to send a personalized email message to each one of your clients.

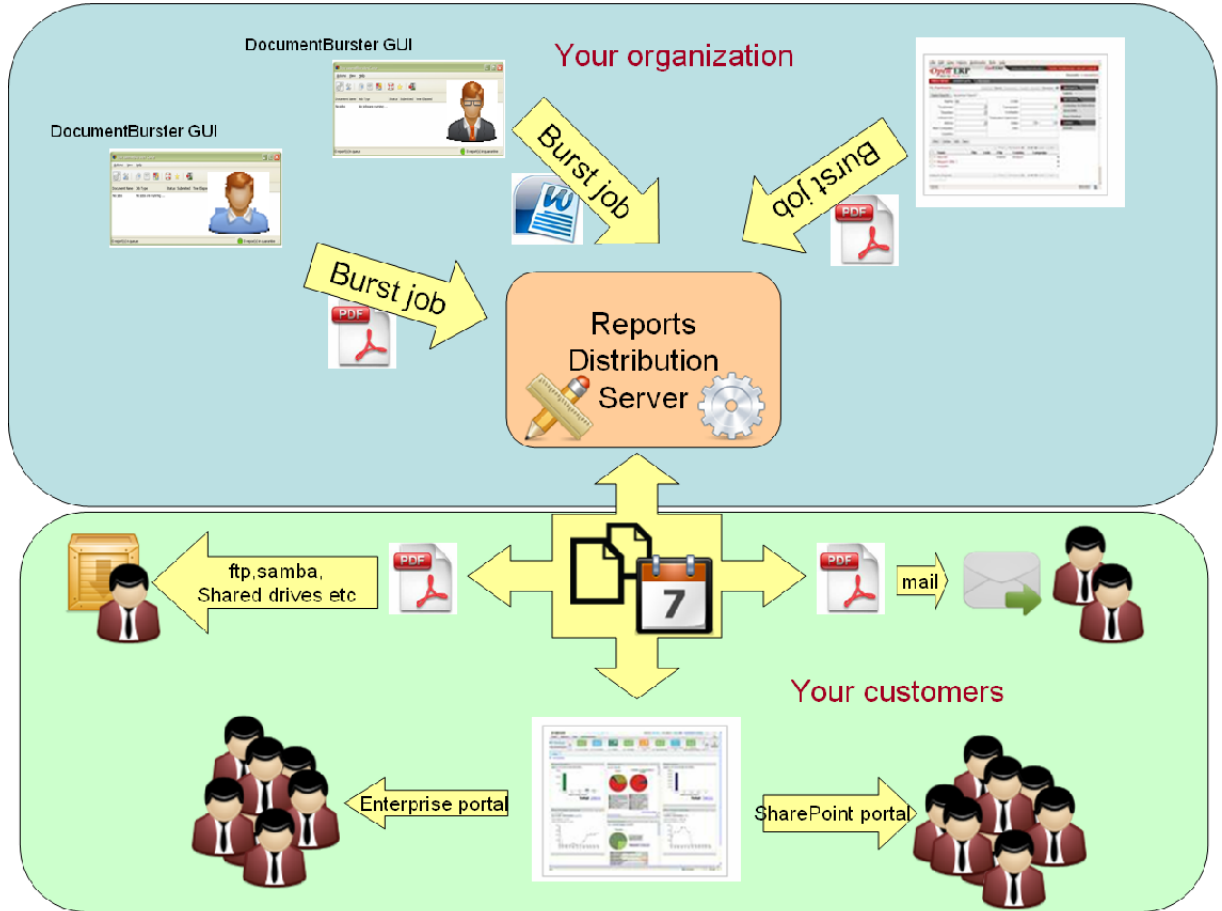
Multiple destination types

Different customers might have different preferences in how to receive the reports which you are distributing to them. In most of the cases email is the default medium through which most of the people prefer to get the reports but in some cases FTP might be an alternative. Some customers might have their own automated software systems which will further process the reports and which might expect the input reports to be placed in a specified remote location. Some customers might have some more strict security related requirements and because of that will require the FTPS protocol. In some scenarios the generated reports should be made directly available to the customers through some kind of an enterprise like portal, such as SharePoint. In order to support such scenarios, *DocumentBurst* gives a broad range of out of the box destination types such as email, local files, FTP, FTPs, SFTP and TFTP, Windows shared drives and UNIX Samba servers or WebDAV capable servers. On top of the enumerated protocols, in case you have some specific requirement, then with the help of a plug-in architecture custom destination types can be implemented and smoothly integrated into the distribution process.

Reports distribution server

DocumentBurst can be deployed as a central report distribution server. This might be useful if you need to have a single common place for distributing your reports which is concurrently accessible to multiple employees from your organization.

Installed as a central reports distribution server, *DocumentBurst* can handle report distribution requests coming from different people or from existing software systems such as ERP, CRM, HR, Billing or Accounting kind of business applications. The distributed reports are stored in a central repository which, if required, can be easily managed by adding advanced indexing and text search capabilities for all burst reports. Each one of your existing customers can receive the reports through his preferred medium, being it email, FTP or any of the other supported destination type.



Scheduling

Scheduling is a common requirement in business applications. *DocumentBuster Server* has advanced scheduling capabilities which can be tailored as per your own needs. It's easy to schedule reports to be processed and distributed at a specific date and time, or to distribute them hourly, daily, weekly, or monthly or set up your own frequencies, every other day, third Monday of the month, and so on.

Scheduling can help you to automate the reports distribution flow. Usually the reports should be distributed to your clients based on a business schedule. Instead of you having to remember each day which reports should be distributed to whom, you can use the scheduling capability to automate the distribution process.

DocumentBuster Server has powerful scheduling capabilities. Distribution jobs are scheduled to run when a given event occurs. Events can be defined with nearly any combination of the following directives:

- at a certain time of day (to the millisecond)
- on certain days of the week
- on certain days of the month
- on certain days of the year
- not on certain days listed within a registered Calendar (such as business holidays)
- repeated a specific number of times

- repeated until a specific time/date
- repeated indefinitely
- repeated with a delay interval

Integration with your existing business software

DocumentBuster, when running as a server, can expose remote report distribution services which can be consumed and automated from your existing CRM or ERP kind of business applications. *DocumentBuster* can expose the remote services in various standards depending on your exact requirements. For example EJB services can be exposed if you need to automate the process from a java client program, or web-services can be an option if you are looking to use a non Java program as a client.

Process and distribute any kind of report

Out of the box *DocumentBuster* can process PDF reports. In real life, you might need to process Word reports, Excel Reports, OpenOffice reports or your own in-house reports. On demand, *DocumentBuster* can burst and process any kind of report types with the help of an initial **step** which is first converting all the non PDF reports to the standard PDF format.

Full-featured reports text search engine

On demand, *DocumentBuster Server* can provide advanced storing, indexing and search capabilities for the reports which you are distributing. This is useful if you burst and distribute many reports each month and after few months you will finish with a huge number of documents which needs to be properly managed. Simply said, using the indexing and search capability will allow you to quickly find a report which was distributed one year ago, even if each month you distribute a lot of reports.

Scalability and high throughput

DocumentBuster is able to process really big reports. Just give it a try and you might be surprised.

However, if you are looking to process a large number of reports and you have a limited timeframe in which the processing should happen, in this case you need to go for parallel processing of your reports.

DocumentBuster Server has a good load balancing mechanism which helps you to achieve the highest throughput possible. It is possible to start multiple instances of the report distribution server application, with these instances being started on the same physical machine or distributed across your network. Using load balancing mechanisms the report distribution work will be properly distributed across all the started instances.

DocumentBuster load balancing is quite flexible and can be configured depending on the types of reports you are processing and also depending on the hardware resources which are available, so that the maximum report processing throughput will be achieved for your given reality.

For example, you might have a situation where you need to process a lot of reports which are not in the PDF format. *DocumentBuster* is processing such reports with an additional initial step which is converting those reports to PDF. This conversion is a resource hungry process and you might see that in order to have a *continuous flow* you need to allocate two times more hardware resources for PDF conversion than

for the other report distribution activities such as merging, splitting and distributing. *DocumentBurster* load balancing can be configured to support such a scenario by having two times more instances of the application dedicated for PDF conversion than to other activities.

Each *DocumentBurster* deployment has a different reality with different types of reports to process and with different hardware resources available. Because of the previous the load balancing mechanism was designed to be flexible enough to accommodate most of the situations.

Priority based reports processing

One feature of the load balancing mechanism is that it can be configured such that the reports will be processed based on priorities defined by you. For example you can define two categories for your reports tagged as **high importance** reports and **normal importance** reports. *DocumentBurster* can be configured to start processing of the reports based on the priorities and even more you can start dedicated application instances to handle your **high importance** reports. This will allow processing of your reports in a continuous flow without having your important reports processing delayed because of the many usual reports which also needs to be processed.

Reports encryption

When handling important financial reports, encrypting the distributed documents with a password might be an interesting feature for you. *DocumentBurster* supports encryption of the distributed reports with password so that a user/customer must specify the password to open the PDF document in Adobe Reader or Acrobat. Encryption is commonly used to prevent unauthorized viewing, printing, editing, copying text from the document and doing annotations.

Reports stamping

For branding purposes, *DocumentBurster* has support for stamping the distributed reports using your company logo, some author signatures or whatever stamp you might need.

With *DocumentBurster* you can stamp the distributed reports in much the same way that you would apply a rubber stamp to a paper document. If required, it is possible to apply bates stamping, page numbering, text stamping, logo insertion or add headers/footers and watermarks to your reports.