OpenInvoice



User Import

OpenInvoice Integration Guide for Buyers

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Overview

Customers typically maintain all of their user data in an HR, payroll, or accounting system. It is desirable for these customers to integrate this data with OpenInvoice's membership data, such that administrators would not have to maintain data in both applications. OpenInvoice has designed a single integration interface, which provides OpenInvoice customers with the ability to upload user information. This document provides guidance for the implementation of user integration and defines associated business rules that complement the XML Schema.

Delivery

For buyers using an OpenInvoice Support-installed secure server, the generated user XML message will be sent to the OpenInvoice secure server receiving URL via HTTP protocol with user name/password authentication. The user name and password will be provided by OpenInvoice Support.

The OpenInvoice secure server receiving URLs are:

Test Environment:
http://TestPartnerServerIPAndPort/invoke/CommonUtilsPartnerTransport:redirectPostToDOTest

Production Environment:
http://ProductionPartnerServerIPAndPort/invoke/CommonUtilsPartnerTransport:redirectPostToDO

For buyers not using a secure server, the generated user XML message will be sent to the OpenInvoice receiving URL via HTTP protocol with SSL authentication.

The OpenInvoice receiving URLs are:

Test Environment:
https://xml.digitaloilfield.com/invoke/DO/doReceive

Production Environment:
https://xml.openinvoice.com/invoke/DO/doReceive

Returned HTTP status code 200 means all of the users specified on the user import XML file have been imported successfully. The HTTP response body contains response document complying with OpenInvoice's DOResponse.xsd schema. The status code will be "Success" and may contain warning messages. Warning messages specify conditions that do not preclude successful import of the document, but may be cause for concern. Warnings are given with the intention that users correct the condition(s) causing the warnings.

Returned HTTP status code other than 200 means either the system cannot process the user import file, such as the user import XML file does not validate against defined schema, or some of the users have not been imported successfully. The status code will be "Failure" in both cases. The response will contain error messages to explain the cause of the upload failure.

It is customer's responsibility to parse the error/warning messages contained in the response. The client is responsible for re-posting the user import file if the initial attempt was unsuccessful.

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A user import file may include multiple users and associated business rules. Multiple user import files can be transmitted to OpenInvoice one by one However the maximum size of each user import file is 3 MB.

Business Rule on Usernames:

Usernames must be unique in the OpenInvoice platform across all clients and users, not just the users in your company. The username assigned to a user in OpenInvoice will not be updated / modified if the username in the import file is different. If the username is not specified in the import file or the name specified already exists then OpenInvoice were generate a username.

- If username is not present, the base username shall be derived from (User/FirstName) + (User/Initial) + (User/LastName)
- If the username already exists when trying to create a new user, a suffix will be added to the base username with the lowest possible integer in order to get a unique username. For example, if the import identifies a new user with

  <Username>joehsmith</Username >
  or
  <FirstName>Joe</FirstName>
  <Initial>H</Initial>
  <LastName>Smith</LastName>

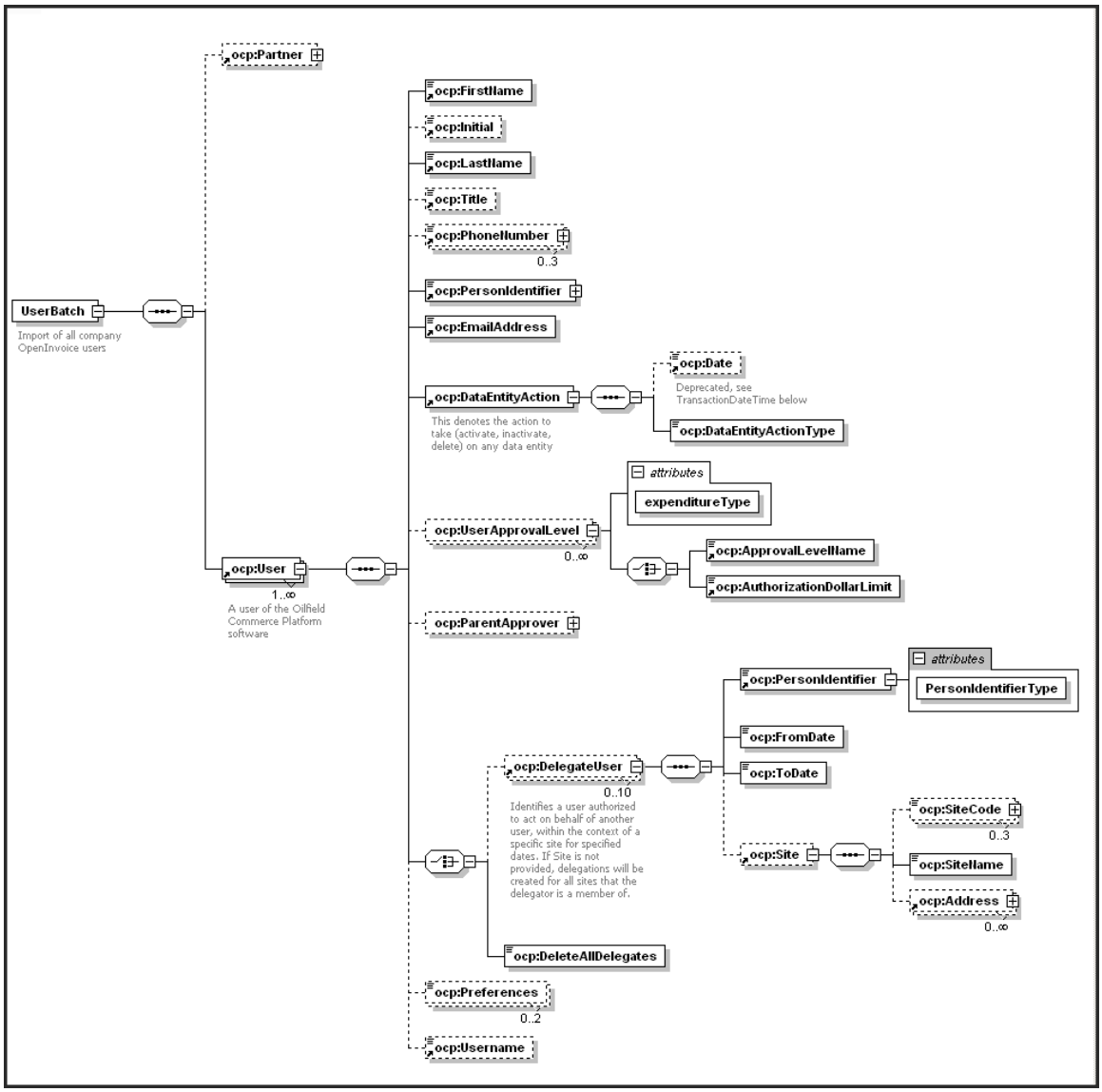
  And the usernames joehsmith, joehsmith1, joehsmith2, and joehsmith123 already exist as system usernames, the assigned username for the new user will be joehsmith3.
- If a username is less than eight characters, it will be padded with zeros and the lowest possible integer suffix to get a unique username. For example, <Username>tjohn</Username> would result in the username tjohn000.
- Each time a new user is created during an import, a warning message will be added to the DoResponse and send back to the customer.

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Data Mapping

Data Structure



UserBatch.xsd is the schema to be used for importing users. The “Partner” section contains the DUNS number for identifying the company that the imported users belong to. The “User” section contains user information, such as user name, email address, approval level etc. for import.

The attributes and elements of the schema that are not included in this document will not be imported and, if sent on a user XML document, will be completely ignored by the process.

Compared to the schema, further restrictions on occurrence, data type, usage and expected values are imposed by this document on a number of elements and attributes in order to facilitate the correct implementation. ”Mandatory” usage specified for an element or a package

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where its parent package has usage specified as “Optional” should be understood as optional parent package, which, when present, necessarily requires the child.

If the submitted attribute length exceeds the maximum length set forth by this document, the message will be rejected by the process.

User Import Partner Element

Tag	Data type	Usage	Description / Business Rules
UserBatch/Partner	Package	Optional	Package to define the company that issued the user import requests
@PartnerType	Enumeration “Buyer” “Supplier” “B2BDocumentSendor” “B2BDocumentReceiver”	Optional	Attribute to indicate the role of the partner. Always set to “Buyer”
UserBatch/Partner/Company	Sub-package	Mandatory	Sub-package contains partner company information
UserBatch/Partner/Company/CompanyCode	String[9]	Mandatory	The DUNS number of the buyer company
@CompanyCodeType	Enumeration “DUNSnumber” “VendorNumber” etc.	Mandatory	Always set to “DUNSnumber”
DocumentStatusUpdateBatch/Partner/Company/CompanyName	String [50]	Optional	Include company name for xml document readability. OpenInvoice does not check this information. Buyer company name.

User Import User Element

Tag	Data type	Usage	Business Rules
User/FirstName	String [25]	Mandatory	First name of the user
User/Initial	String [1]	Optional	Initial of the user
User/LastName	String [25]	Mandatory	Last name of the user
User/Title	String [50]	Optional	Job title of the user
User/PhoneNumber	String [50]	Optional	Primary phone/Cell/ phone fax number of the user
@PhoneNumberType	Enumeration “Primary” “Secondary” “Fax”	Optional	Define whether the specified phone number is for primary, cell or fax
User/PersonIdentifier	String [25]	Mandatory	Employee Numbers will serve as the natural key to lookup and update user information, so they must be unique across the company. Partners are free to populate Employee Number with any unique identifiers, such as email addresses or primary key values from ERP/HR systems. If a company has erroneously assigned the same Employee Number to two or more employees, DO has no way of knowing this and will keep updating a single User record.
@PersonIdentifierType	Enumeration “EmployeeNumber”	Mandatory	Always set to “EmployeeNumber”

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Tag	Data type	Usage	Business Rules
User/EmailAddress	String [100]	Mandatory	User email address. Please make sure a valid email address is entered so that user will receive notifications (such as stalled document email notification) set out by OpenInvoice system.
User/DataEntityAction	Package	Mandatory	Package to define the status of the user.
User/DataEntityAction/DataEntity ActionType	Enumeration “Activate” “Inactivate” “Delete” “Decommission”	Mandatory	The status of the user.
User/UserApprovalLevel	Package	Optional	Package to define all the approval levels assigned to the user. Please note a user has to have approval level in order to be qualified as a requisitioner.
@expenditureType	String [25]	Mandatory	Approval type name. Different types of approval limits can be assigned to a user. For example a user assigned with “Consultants” type of approval can approve consultant invoices up to a specified approval limit.
User/UserApprovalLevel/Approval LevelName	String [100]	Either /ApprovalLevelName or /AuthorizationDollarLimit should be specified if /ApprovalLevel package is presented but not both. If a User is already assigned to an approval level, it shall be possible to change the user’s approval level if a valid new ApprovalLevelName or AuthorizationDollarLimit is specified. A user approval level cannot be deleted if the user has outstanding documents. If /ApprovalLevelName is provided and the lookup does not yield a result, an ApprovalLevel will be dynamically created with a $0 limit. If /AuthorizationDollarLimit is provided and the lookup in OpenInvoice database yield no results, an ApprovalLevel will be dynamically created with the provided / AuthorizationDollarLimit If /.AuthorizationDollarLimit lookup yields more than 1 result, create the warning – “There is more than one approval level with a spend limit of ${XML DollarLimit}. User {email address} was not assigned an approval level”.		
User/UserApprovalLevel/Authoriz ationDollarLimit	Number up to 6 decimal		
User/ParentApprover	Package level	Optional	Package to define the parent approver.

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Tag	Data type	Usage	Business Rules
User/ParentApprover/PersonIdentifier	String [25]	Mandatory	The employee ID of the parent approver. If the parent approver's employee number could not be resolved to an existing system user, the warning "Parent Approver '{xml employee number}' could not be resolved for user '{first name + " " + last name of user currently being processed}'." Any OI business rules regarding who is and is not eligible to be a user's parent approver must also be enforced. The import process shall simply present the request to establish a parent approver relationship to OI; OI shall determine if the request can be accommodated or not. For example, if the employee number of a parent approver corresponds to a user with a lower approval level or no approval level, the request shall not be completed.
@PersonIdentifierType	Enumeration "EmployeeNumber"	Mandatory	Always set to "EmployeeNumber"
User/DelegateUser	Package level	Optional	Package to define the delegated user.
User/ DelegateUser/PersonIdentifier	String [25]	Mandatory	The employee number of the delegated approver. If the delegate user's employee number could not be uniquely resolved to an existing system user, the warning "Delegate user '{first name + " " + last name }' could not be resolved for user '{first name + " " + last name of user currently being processed}'." Any additional delegates for the current user should continue to be processed.
@PersonIdentifierType	Enumeration "EmployeeNumber"	Mandatory	Always set to "EmployeeNumber"
User/ DelegateUser/FromDate	Date	Mandatory	The delegation start date in the format of yyyy-mm-dd. Eg. 2009-11-12
User/ DelegateUser/ToDate	Date	Mandatory	The delegation end date in the format of yyyy-mm-dd. Eg. 2009-11-13
User/DelegateUser/Site	Package level	Optional	Package to define site affected by the delegation.
User/DelegateUser/Site/SiteCode	String [25]	Optional	Both the delegator and the delegatee must be members of the site, determined by the departments the users are members of. If both delegator and delegatee are not members of the site, the delegation should be ignored and a warning created. If a single User.DelegateUser is provided and User.DelegateUser.Site is not present, then it shall be assumed that the delegation applies to all sites that the delegator is a member of. If the delegate's site could not be uniquely resolved to an existing site, the warning "Delegate user '{first name + " " + last name }' could not be assigned for user '{first name + " " + last name of user currently being processed}' since site '{siteCode/siteName}' could not be resolved." Any additional delegates for the current user should continue to be processed.
User/DelegateUser/Site/SiteName	String [50]	Mandatory	

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Tag	Data type	Usage	Business Rules
User/DeleteAllDelegates	Boolean – true or false	Optional	If this element is set to “true”, all delegations will be removed prior to processing the user. Please note this element and User/DelegateUser should not be set at the same time.
User/Preferences	Enumeration “Field tickets are remitted to this user” “Notify on new OI *documents*”	Optional	User preference for given options . User has options of none or both specified enumeration values.
User/UserName	String [100]	Optional	User name for logging into OpenInvoice. Please refer to the following section “Business Rules on Usernames” for detailed business rules.

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