



CREATIO
- DOCUWARE CONNECTOR -

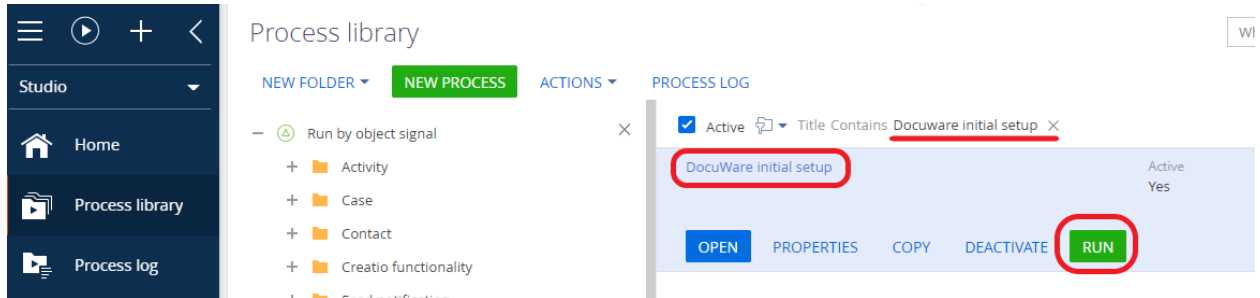


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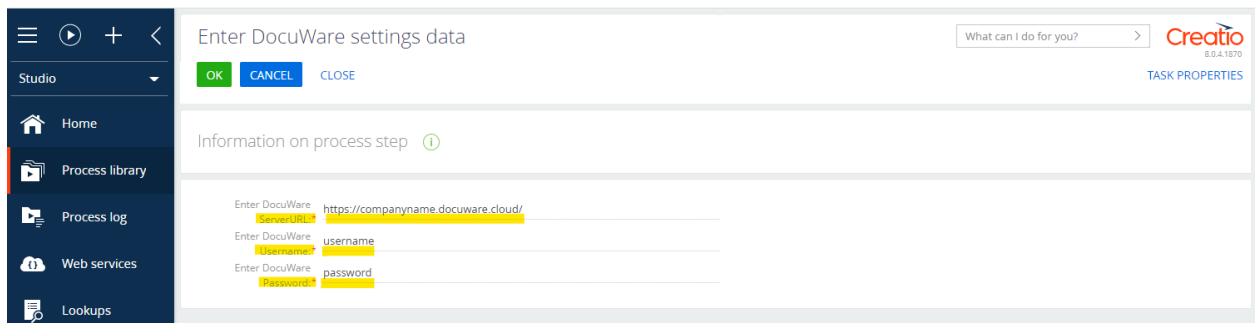
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1 SETTING UP DOCUWARE CONNECTOR

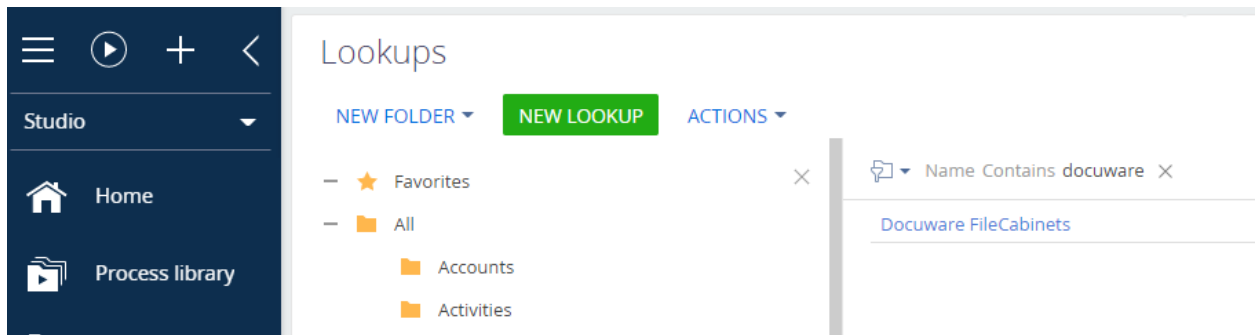
1. Find Business process **DocuWare initial setup** in Process library and start it



2. Fill in necessary fields, URL to DocuWare system, Username and Password to login to DocuWare



After process is successfully finished, Creatio DocuWare connector is configured (Lookup DocuWare FileCabinets is filled in automatically) and ready to be used in Business processes.



2 USING DOCUWARE CONNECTOR

Create Business processes with following actions to DocuWare:

2.1 UPLOADING DOCUMENT TO DOCUWARE

1. Define **Start signal** to which Object attachment to be connected to (in this example it is Contact attachment, when record is added):

The screenshot shows a process editor window titled "Add Contact attachments to DocuWare". On the left, a palette of actions includes "Contact attachment added". A blue line connects this action to a red circle on the process flow. On the right, a "Signal" configuration panel is open, showing the following settings:

- Which type of signal is received? Object signal
- Object* Contact attachment
- Which event should trigger the signal? Record added
- The added record must meet filter conditions
- Actions: Type File
- AND
- Run following elements in the background

2. Add **DocuWare Upload Document** and fill in parameters:

The screenshot shows the same process editor window. The "DocuWare Upload Document" action is selected from the palette and connected to the process flow. The configuration panel for this action is open, showing the following settings:

- To which record to connect this process: Object
- Contact attachment
- Object id* [#Contact attachment added Unique identifier of record]
- FileCabinetParameter* Dev-Creatio

Below the configuration panel, there are "AI SUGGESTIONS" for "Read data" and "Modify data".

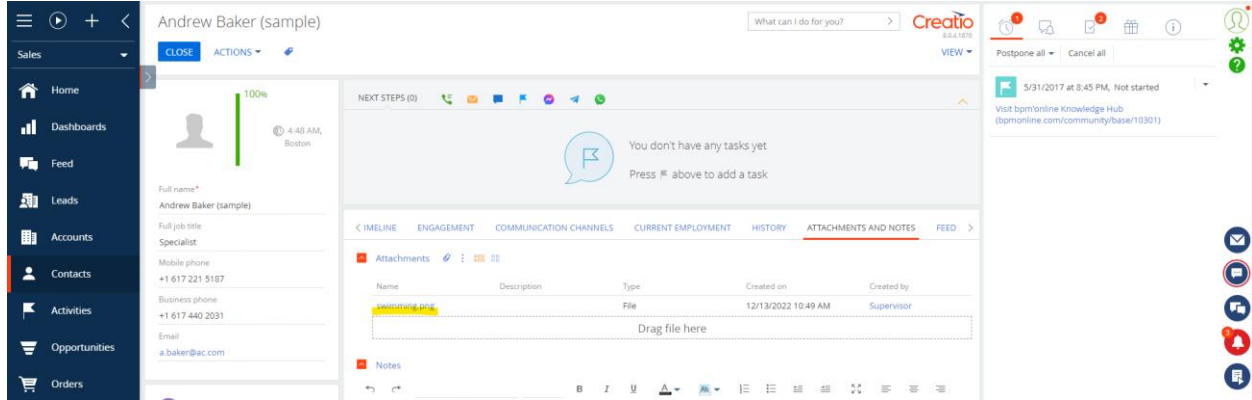
Object – Parameter to which object in Creatio this document is connected to

Object Id – Parameter which record id in Creatio this document has

FileCabinetParameter – to which folder (FileCabinet) in DocuWare this document should be saved to

3. Save Business process

After a document is UPLOADED to DocuWare, link to the Document will be automatically changed to point to a document in DocuWare system. So, when user clicks on link (see screenshot below), it will open a document from DocuWare system in a new tab in browser.



In case that upload of Document to DocuWare in business process fails (example: UserTask **DocuWare Upload Document** did not finish successfully, because of Web API call returned error, if user does not have right to upload a document in particular FileCabinet in DocuWare), business process will be still successfully finished, but Link to an uploaded document will not point to a document in DocuWare, but to a document in Creatio instead.

Error for UserTask will be logged in Messaging log file.

2.2 DELETING DOCUMENT FROM DOCUWARE

1. Define **Start signal** to which Object attachment to be connected to (in this example it is Contact attachment, when record is deleted):

Delete Contact attachments from DocuWare

SAVE RUN CANCEL ACTIONS

Signal: Contact attachment deleted

Which type of signal is received?
Object signal
Contact attachment

Which event should trigger the signal?
Record deleted

The record must meet the filter conditions
Actions
Type = File

Run following elements in the background

2. Add **DocuWare Delete Document** and fill in parameters:

Delete Contact attachments from DocuWare

SAVE RUN CANCEL ACTIONS

Perform task
User dialog
Open edit page
Auto-generated page
Pre-configured page
Send email
DocuWare Delete Document
DocuWare Upload Document
Approval

DocuWare Delete Document

Delete Contact document from DocuWare

To which record to connect this process:
Object
Contact attachment
Object id*
[#Contact attachment deleted Unique identifier of record#]

Object – Parameter to which object in Creatio this document is connected to
Object Id – Parameter which record id in Creatio this document has

3. Save Business process