# CREATIO

# - DOCUWARE CONNECTOR -
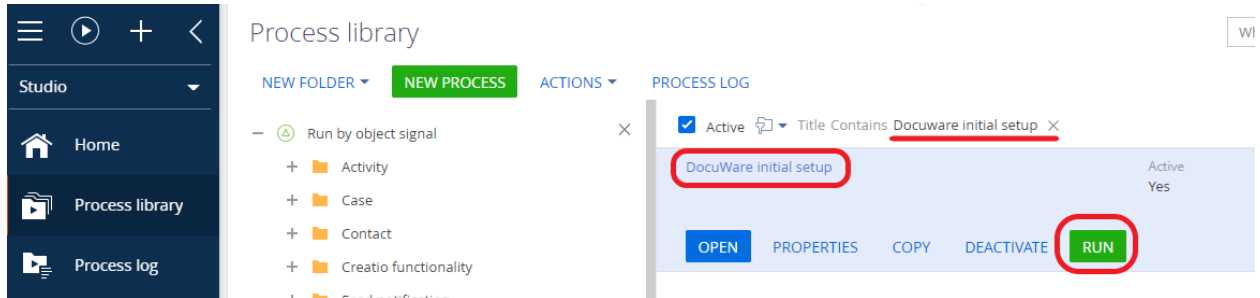
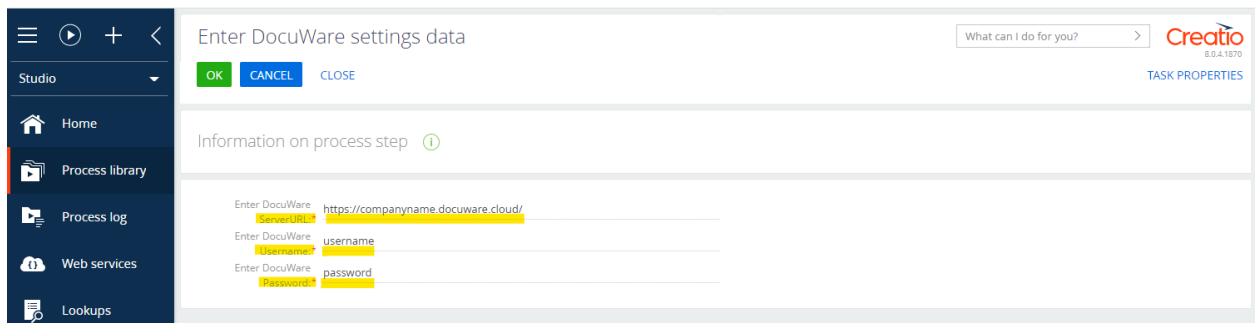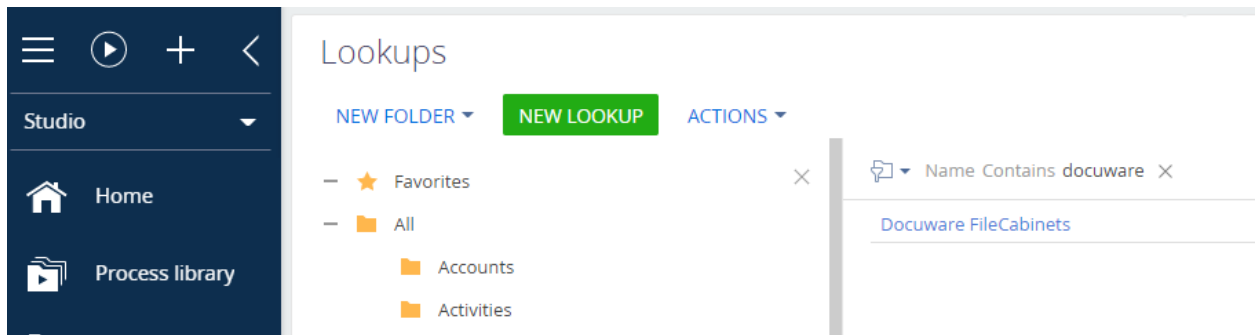## Contents

# 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):



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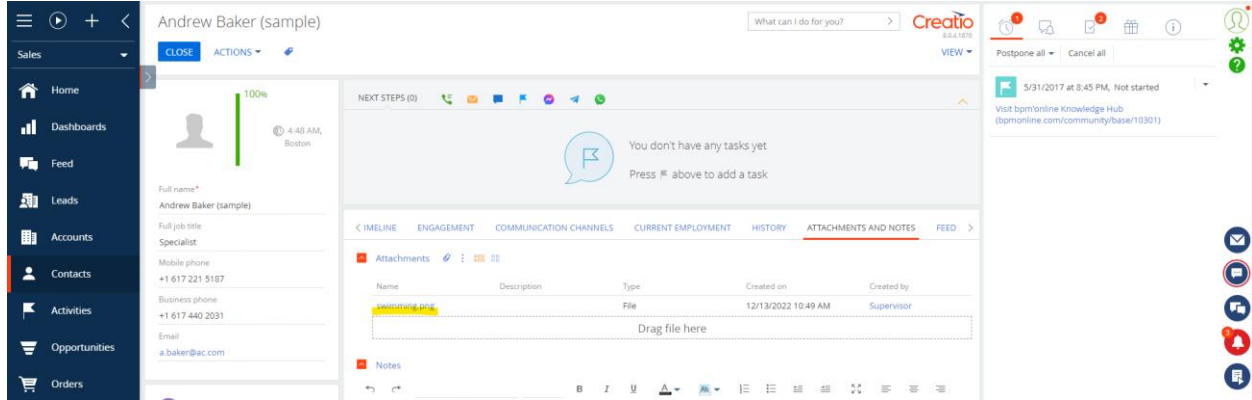


**Object** – Parameter to which object in Creatio this document is connected to
**Object Id** – Parameter which record id in Creatio this document has
**FileCabinetParameter** – to which folder (FileCabinet) in DocuWare this document should be saved to

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):



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



**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