

OpenText™ Process Automation

Integration Guide

This guide describes how to configure the integration between OpenText Process Automation and AppEnhancer.

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Chapter 1

Introduction

OpenText Process Automation provides a single platform for process automation, case management, and low-code application development, to automate complex business processes, enable better decision making, and improve customer experiences.

OpenText Process Automation supports integration with OpenText AppEnhancer, both at the document management and metadata levels. Users can manage AppEnhancer documents in OpenText Process Automation and synchronize entity data as application documents in AppEnhancer Web Access. This guide describes how to configure the integration between OpenText Process Automation and AppEnhancer.

1.1 Prerequisites

Before you configure the integration between AppEnhancer and OpenText Process Automation, ensure that the following requirements are met:

- AppEnhancer 24.4 or later is installed and configured with OpenText Directory Services (OTDS).
- OpenText Process Automation 24.4 or later is installed and configured with the same OTDS as AppEnhancer.

1.2 Integration features

The OpenText Process Automation integration with AppEnhancer includes the following features:

- AppEnhancer is integrated with the Document Store connector in OpenText Process Automation.
- AppEnhancer supports single sign-on (SSO) access using OTDS-based OAuth authentication.
- OpenText Process Automation administrators can map an entity with an application in AppEnhancer and the entity property with an AppEnhancer application field. Single or Multiple entities in OpenText Process Automation can be mapped to an application in AppEnhancer. Administrators can determine whether a document in AppEnhancer should be deleted when the corresponding entity item is deleted in OpenText Process Automation. Any change to entity data is automatically synchronized to the corresponding AppEnhancer document.

- Developers can build solutions in OpenText Process Automation using entity modelling and deploy these solutions within the application. An entity item with a file represents an application document in AppEnhancer.
- Application users can create an entity item and upload a document, which creates a corresponding document in AppEnhancer. Application users can manage the document and perform common document management operations in OpenText Process Automation. The operations that are supported include uploading a new document, downloading a document of a single MIME type or multiple MIME types, adding a new document version and managing document versions, viewing metadata and audit history, previewing a document, and deleting a document.
- When entity item data changes in OpenText Process Automation, the application record in AppEnhancer is updated automatically.
- OpenText Process Automation web services for AppEnhancer integration include a web service to fetch the mapping between the OpenText Process Automation entity and AppEnhancer application, as well as a web service to fetch the User Defined List (UDL) values from an AppEnhancer field. The latter can be used in a dynamic enumerated list in OpenText Process Automation to fill values dynamically from AppEnhancer.
- AppEnhancer viewer is the native viewer for documents stored in AppEnhancer and it becomes the default viewer in OpenText Process Automation when configured with AppEnhancer. OpenText Process Automation users can use the features in the AppEnhancer viewer based on the user permissions configured in AppEnhancer.
- AppEnhancer viewer can be configured for read-only mode in OpenText Process Automation administration.
- OpenText Process Automation administrators can configure parameters that can be static parameters or entity properties. These configured parameters will be sent to the AppEnhancer viewer when the user views the document using the **Preview** panel or in the full viewer by clicking **Open in viewer**.
- OpenText Process Automation entity item data is synchronized with the corresponding AppEnhancer application record based on the defined mapping. By default, the synchronization is automatic and any changes to the entity data is automatically synchronized with the AppEnhancer application record. If preferred, administrators can configure synchronization to be manual in OpenText Process Automation administration. Subsequently, application users can use the **Synchronize properties** option to synchronize entity data with the application record.

The AppEnhancer integration with OpenText Process Automation includes the following features:

- OpenText Process Automation supports single sign-on (SSO) access using OTDS.
- Any index change in AppEnhancer is automatically synchronized to its corresponding OpenText Process Automation entity.

- When a document is created in AppEnhancer, the OpenText Process Automation entity instance is created and linked to the AppEnhancer document automatically if the entity has the keyword default in its name, otherwise the document needs to be manually submitted to the workflow. If lifecycle functionality is configured, a lifecycle is triggered in OpenText Process Automation.
- When a document is deleted from AppEnhancer, the document that is linked to the corresponding entity record in OpenText Process Automation is unlinked.
- AppEnhancer Web Access users can manually submit an existing AppEnhancer document to the OpenText Process Automation workflow.
- AppEnhancer Web Access users can view the OpenText Process Automation My Inbox.

Chapter 2

Configuration

This chapter describes the steps for configuring and integrating OpenText Process Automation with AppEnhancer.



Note: This chapter provides high-level steps. For detailed information about developing an application in OpenText Process Automation, refer to the latest version of *OpenText Process Automation Low-Code Design Guide*.

2.1 Developing an application using entity modelling

OpenText Process Automation Low-Code Design Guide synchronizes entity data with AppEnhancer. This means that an entity must be created in OpenText Process Automation for every application in AppEnhancer. To develop an application, ensure that the user who is developing the application is assigned to the Developer role.


1. Sign in to OpenText Process Automation using the OTDS user name and password.
2. Start developing an application using entity modelling. Refer to *OpenText Process Automation Low-Code Design Guide* for more information about developing an application using OpenText Process Automation.
3. Create one or more entities and add the required properties to the entity. Make sure that the application has entities and properties corresponding to the application in AppEnhancer. Make sure that the data types of properties match the data types of fields in the application. For more information about data types and formats, see [“Mapping data types” on page 10](#). For more information about defining AppEnhancer flags, see [“Mapping flags” on page 11](#).
List, Layout, and Create form are added by default.
4. Add a file building block and keep the default configurations. It is mandatory to have a file building block for all entities that are synchronized with applications in AppEnhancer.
5. Add a form. In the **Name** drop-down menu, select **Default**. In the **Type** drop-down menu, select **Cancellable**.
6. Add a web service building block and generate standard web services.
7. Generate a Find web service with parameters to uniquely identify an item. AppEnhancer uses entity web services for integration between AppEnhancer and OpenText Process Automation. To add a Find web service, in Advanced configuration, add a new web service called FindDocument. In FindDocument operations, add parameter *DocumentURL*, and set the filter condition to

File.StorageTicket contains Parameter DocumentURL

8. Add other required building blocks. If a workflow is required, add the life cycle building block and model the workflow states and actions. To define unique constraints or any business rule, add the rule building block.
9. When you are finished developing the application, publish it to an organization for configuration and validation. In your workspace, right-click the project and click **Publish to Organization**.

2.1.1 Mapping data types

OpenText Process Automation integration with AppEnhancer allows users to store entity instances as AppEnhancer application records along with documents. The following table describes how application data types in AppEnhancer map to entity data types in OpenText Process Automation.

| AppEnhancer application data type | OpenText Process Automation entity data type |
|-----------------------------------|--|
| Text | Text |
| Time (hh:mm:ss) | Text |
| SSN | Text |
| Telephone | Text |
| ZipCode | Text |
| Custom Type | Text |
| Integer | Integer |
| Number/Decimal | Decimal |
| Date | Date |
| TimeStamp | Date and Time [1] |
| Currency | Currency [2] |
| Boolean Choice | Boolean |
| User Defined List | Enumerated Text  Note: Select Static to define static values, or Dynamic to use the user-defined list from AppEnhancer. |

[1] The Date and Time value is automatically generated in AppEnhancer.

[2] In OpenText Process Automation, the user must choose the currency. The user should also create the Currency format in AppEnhancer using the same currency symbol that is used in OpenText Process Automation. For more information, see [“Known limitations” on page 21](#).



Note: For more information about configuring data types, refer to the latest version of *OpenText Process Automation Low-Code Design Guide*.

2.1.2 Mapping flags

AppEnhancer application fields use various flags. The following table describes how the flags in AppEnhancer map to the AppEnhancer flags in OpenText Process Automation.

| AppEnhancer Flags | Mapping the flags to OpenText Process Automation entity |
|---|---|
| Required | When designing a form in OpenText Process Automation, select the corresponding entity property and, in the right pane, mark it as Required. During runtime, an asterisk (*) is displayed for the property. |
| Read-Only (the user can enter data only once) | Select the corresponding entity property and, in the right pane, navigate to Advanced configuration > Allow participants to change the value , and select the Only when first created check box. |
| Part of Unique Key | In OpenText Process Automation, define rule of type uniqueness. |
| Validation Mask | Validation Mask is not supported. |
| Dual Data Entry | See “Configuring a dual property” on page 11 . |

2.1.2.1 Configuring a dual property

The steps below show an example of how you can configure a dual data entry for a property.

1. Create an entity. For more information about creating an entity, see *OpenText Process Automation Low-Code Design Guide*.
2. Create a property. For example, INSURANCE_AMOUNT.
3. Create another property with the same characteristics as the above property. For example, INSURANCE_AMOUNT_DUPLICATE.
4. Add a rule building block. The **Add rule** dialog box opens.
5. In the **Type** list, select **Event** and provide a name for the rule. For example, DualEntryCheck.
6. In the **Event** list, select **A property changes**.
7. In the **Condition** field, click **Switch to advanced editor** and type the condition as follows:

```
(item.Properties.INSURANCE_AMOUNT != null OR  
item.Properties.INSURANCE_AMOUNT_DUPLICATE != null) AND  
item.Properties.INSURANCE_AMOUNT !=  
item.Properties.INSURANCE_AMOUNT_DUPLICATE
```

8. In the **Action** list, select **Show error**.
In the text area, enter the message which must be displayed to the user if the above condition fails.
9. Save and publish the project.
If the user provides different values to INSURANCE_AMOUNT and INSURANCE_AMOUNT_DUPLICATE, the message which you configured in **step 8** will be displayed.

2.2 Configuring document store service with AppEnhancer

1. In OpenText Process Automation, in the created organization, open the **System Resource Manager**.
2. Right-click the AppEnhancer document store connector and click **Properties**.
3. Open the **Document Store** tab.
4. In the **Store type** list, select **OpenText AppEnhancer**.
The viewer type automatically updates to **AppEnhancer viewer**.
5. In the **AppEnhancer URL** box, enter `http://<appenhancerServer>/AppEnhancer` where `<appenhancerServer>` is the address of the AppEnhancer server.
6. In the **OTDS details** area, in the **Client ID** box enter the client ID.
7. In the **Client secret** box, enter the client secret key.
8. In the **Rest endpoint URL** box, , enter `http://<appenhancerServer>/AppEnhancerRest` where `<appenhancerServer>` is the address of the AppEnhancer server.
9. In the **Datasource name** box, enter your data source name.
10. Click **Save**.

2.3 Creating an Application Server Connector

To work with the entity web services, create an Application Server Connector for the organization. Ensure that entity web services are attached to the Application Server Connector.

For more information about creating service containers, refer to the latest version of *OpenText Process Automation Administration Guide*.

2.4 Mapping an OpenText Process Automation entity to AppEnhancer application

You can use OpenText Process Automation to configure entity properties and AppEnhancer application fields. The mapping is displayed only when the entity has file building blocks and the document store connector is configured with AppEnhancer.

The administrator can select the application and map the entity properties with the AppEnhancer application field. Hovering the mouse over the property or field displays the data types of those properties or fields. The administrator needs to consider the following while mapping:

- Mandatory field values must be mapped.
- The Time Stamp field is automatically generated in AppEnhancer and does not need to be mapped.

OpenText Process Automation administrators can configure parameters that can be static parameters or entity properties. These configured parameters are sent to AppEnhancer viewer when a user views a document using the preview panel or in the full viewer when **Open in viewer** is selected.

For more information about configuring entity properties in OpenText Process Automation, refer to the latest version of the *OpenText Process Automation Low-Code Design Guide*.

For more information about mapping data types, see [“Mapping data types” on page 10](#).

For more information about mapping flags, see [“Mapping flags” on page 11](#).

2.5 Adding an OAuth filter in OpenText Process Automation

To add an OAuth filter in OpenText Process Automation, contact your account manager.

2.6 Enabling Event Dispatch Broker (EDB) in AppEnhancer Administrator

1. In AppEnhancer Administrator, navigate to **Server Management > Event Dispatch Broker**.
2. In the **Properties** tab, set **Enabled** to **true**.
3. In the **Event Dispatch Broker URL** field, enter the Event Dispatch Broker URL. For example, `http://<machineName>/Broker` where `<machineName>` is your IP address or localhost.
4. Click **Save**.

2.7 Enabling Workflow Integration Module (WIM) in AppEnhancer Administrator

1. In AppEnhancer Administrator, navigate to **Server Management > Workflow Integration Module**.
2. In the **Properties** tab, set **Enabled** to **true**.
3. In the **WIM Host** field, enter the host name. For example, `<machineName>` where `<machineName>` is your IP address or localhost.
4. Click **Save**.

2.8 Maintaining Document IDs while modifying documents in Workflow Integration Module (WIM)

When you edit a specific document using its document ID from the **Query Results** page, the document IDs of other documents are also altered. As a result, an incorrect list of documents is displayed during search.

To prevent this and ensure documents are edited accurately, the following information must be added in the app settings of the `WIM.exe.config` file:

```
add key="FindValueDelimiter" value="&quot;" />
```

You can find `WIM.exe.config` file in the `C:\Program Files\XtenderSolutions\Content Management\WIM` folder.

2.9 Configuring OpenText Process Automation in AppEnhancer Administrator

Before you proceed, ensure OpenText Process Automation is installed and OTDS is configured.

For more information on installing OpenText Process Automation, see *OpenText Process Automation Installation Guide*.

1. Go to the **Server Management > Workflow Server** node in AppEnhancer Administrator.
2. On the **Workflow Server** page, click **Add OpenText Process Automation**.



Note: For a specific server, you can configure either OpenText Process Automation or a flowable instance. You cannot configure both simultaneously.

3. Add the following details on the **Server Properties** tab:
 - **Workflow Name:** A name for the workflow.
 - **Workflow Type:** Type of the workflow. For example, the **OpenText Process Automation** workflow type appears by default.
 - **OPA Server:** OPA server name.
 - **OTDS Server:** OTDS server name.
 - **OPA OTDS Resource ID:** Resource ID for the OPA OTDS server, which was established when the OPA OTDS resource was created.
 - **User Name:** Type the Administrator user name. This username must have Administrator and Sysadmin permissions.
 - **Password:** Type the password for the Administrator account.
 - **Show Password:** Select the check box to view the password.
 - **Confirm Password:** Type the same password to confirm the password for the Administrator user name.
4. On the **Data Sources** tab, select an existing data source name.



Note: You can select only one data source.

5. Click **SAVE**.

A new file is created for the configured workflow and saved as `WFConfig.xml` in your local WIM folder. For example, the `C:\Program Files\XtenderSolutions\Content Management\WIM` folder.

6. Click **VALIDATE** to validate the workflow server configurations.



Note: Click **DELETE** to delete the existing workflow.

Resetting OPA workflow

1. Go to the **Server Management > Workflow Server** node in AppEnhancer Administrator.
2. On the **Workflow Server** page, select the OPA workflow you want to reset.
3. Click **RESET**.
4. Click **YES** to confirm the deletion of unsaved changes.

2.10 Viewing the OpenText Process Automation Inbox in AppEnhancer

All the workflows configured for OpenText Process Automation appear as a list on the AppEnhancer Web Access home page title bar. Each workflow has a separate inbox.

To view the inbox:

- Login to the AppEnhancer Web Access account as an OTDS user.

2.11 Viewing the Workflow Task Inbox

1. Login to your AppEnhancer Web Access account as an OTDS user.
2. Click **User Settings** in the title bar.
3. On the **Data Source** tab, in the **Workflow** section, select **Display Workflow Task Inbox**.
4. Click **SAVE**.

2.12 Downloading PDF documents

OpenText Process Automation uses the export job API with the *usePDFFormat* parameter set to *false* (*usePDFFormat=false*). Documents with one AppEnhancer page are downloaded as is, while documents with multiple PDF pages can be downloaded as a single PDF file.

To enable downloading multiple files as a single PDF file, do the following:

1. Select the **Use Multipage Files** check box.
2. Clear the **Export in Archived Format** check box.
3. Restart the AppEnhancer server.

If these options are not set, AppEnhancer PDF documents with multiple pages will be downloaded as ZIP files and each page will be a PDF document inside that ZIP file.



Note: All other AppEnhancer documents with more than one page are downloaded as a ZIP file that contains each page as a file inside it.

2.13 Deploying the application


Once the application is designed and working as expected, it can be packaged and deployed to another system like QA or a production server.

For more information about packaging and deploying an application, refer to the latest version of *OpenText Process Automation Administration Guide*.

Chapter 3

Creating entities and documents

3.1 Creating entities in OpenText Process Automation

To create an entity, sign in to the application in OpenText Process Automation and click the **New** button, . On the **Create form** page, provide the values and click **Upload**.

An entity instance is created in OpenText Process Automation and a corresponding document is created in AppEnhancer.

Notes

- While creating an entity instance, the user must fill all mandatory fields before uploading a document. If any of the mandatory fields are not filled, uploading the document into AppEnhancer will fail.
- In OpenText Process Automation, the page that allows you to configure the mapping between entity properties and AppEnhancer properties is shown only if the file building block is added during the entity creation stage.

3.2 Creating documents in AppEnhancer

To create a new document:

1. In AppEnhancer Web Access, in the Event Dispatch Broker enabled application, click **New document**.
2. Add a page and fill in the index values.
3. Click **Save**.

The document is saved in AppEnhancer.

Documents are automatically synchronized to OpenText Process Automation if the entity name contains the keyword `default`. If the entity name does not bear the keyword `default`, then the document must be manually submitted.

To submit the document to OpenText Process Automation, in the query results, select a document and then go to **Workflow** > `<entityName>`.

Chapter 4

Known limitations

This chapter describes the known limitations that users might encounter with the OpenText Process Automation integration.

| Issue/limitation | Description |
|--|--|
| Entity instance deletion is not successful | When a document is checked out in the AppEnhancer repository, it is expected that the corresponding entity could not be deleted in OpenText Process Automation. However, if the document is checked out by another user, the error is not shown to the user in OpenText Process Automation, and entity deletion is successful. The entity is deleted in OpenText Process Automation, but the document is not deleted in AppEnhancer. |
| Updating is not allowed for read-only properties of AppEnhancer documents | Read-only properties of AppEnhancer document are allowed to be filled while creating an entity instance. After the entity instance is created, read-only properties cannot be updated again. |
| Do not map the timestamp AppEnhancer properties with entity properties | These properties are automatically generated in AppEnhancer. |
| Property changes in AppEnhancer are not reflected in OpenText Process Automation | If any property attributes are changed in AppEnhancer after mapping is done in the OpenText Process Automation, the new attributes that are added are not reflected in OpenText Process Automation. You must remap the properties in OpenText Process Automation. |

| Issue/limitation | Description |
|---|--|
| <p>OpenText Process Automation shows error message “The service 'getApplications' is not supported by the XDS implementation of the Document Store”</p> | <p>Workaround: Refresh the browser and clear document store rest cache. Access the following two URLs to clear the cache:</p> <ul style="list-style-type: none"> • <code>http://<serverName>:<portNumber>/home/<organizationName>/app/documentservices/rest/cache/reset</code> • <code>http://<serverName>:<portNumber>/home/<organizationName>/app/documentservices/rest/cache/flushOrgEntry</code> <p>Enter the values according to your environment where <i><serverName></i> is the IP address or URL, <i><portNumber></i> is the port number, and <i><organizationName></i> is the name of the created organization.</p> |
| <p>Failure to check in a document</p> | <p>After the user uploads a document in OpenText Process Automation and performs the check out action in AppEnhancer, the check in action cannot be performed in OpenText Process Automation. An error message appears, indicating that the document is checked out in AppEnhancer by the same user. Any document that is checked out in AppEnhancer must be checked in to AppEnhancer as well.</p> |
| <p>Failure to display user name for a checked out document</p> | <p>The Properties screen in OpenText Process Automation will not display the user name in CheckedOutBy if the document is checked out by another user in AppEnhancer.</p> |
| <p>Incorrect document path is displayed after checking out and checking in the document in AppEnhancer</p> | <p>After uploading a document in OpenText Process Automation and performing check out and check in actions in AppEnhancer, the document path or location still points to the initial uploaded document.</p> |
| <p>Currency Types</p> | <p>Users must select the same currency format in AppEnhancer and OpenText Process Automation.</p> |
| <p>Failure to synchronize index values</p> | <p>When the user opens an existing document in AppEnhancer and updates the index values, the index values are not synchronized to OpenText Process Automation. The user must click Close Document or return to the query results panel for the updated index values to be synchronized to OpenText Process Automation.</p> |