

Perceptive Connector for Infor Lawson AP Invoice Automation

Integration Guide

Version: 1.0.x

Compatible with ImageNow Version: 6.7.x

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About Perceptive Connector for Infor Lawson AP Invoice Automation

Perceptive Connector for Infor Lawson APIA (AP Invoice Automation) integrates ImageNow with Infor Lawson APIA to enable creation of financial accounting and invoice processing transactions within the Infor Lawson environment directly from ImageNow. During the invoice coding and approval process in APIA, users view the invoice image via requests made through the connector. When invoice processing is complete, APIA submits the final invoice information to ImageNow through the connector, facilitating the synchronization of document indexes. The connector routes the document through workflow as it is updated. To enable seamless communication between ImageNow and Infor Lawson APIA, both the applications and the connector must be configured. This guide discusses about how to configure ImageNow, Infor Lawson APIA, and the Perceptive Connector for Infor Lawson APIA so that they can seamlessly communicate with each other.

This assumes that ImageNow, Infor Lawson APIA, and Perceptive Connector for Infor Lawson APIA are already installed. For more information about the installation process of these products, refer to the respective installation and setup guides.

Configure ImageNow

ImageNow workflow with Envoy services facilitates back-end integration of ImageNow with Infor Lawson APIA. To configure ImageNow to work with Infor Lawson APIA, complete each of these tasks in the specified order.

1. **Create the custom properties**
2. **Create the document type**
3. **Associate custom properties to document type**
4. **Configure ImageNow Envoy**
5. **Create the workflow process**

Create the custom properties

You must create the following custom properties that automatically updates after the document is successfully processed by Infor Lawson.

- Finance Group
- Company
- Vendor ID
- Vendor Name
- Invoice Number
- Invoice Date
- Invoice Amount
- PO Number
- Voucher Number

- Payment Number
- Payment Date
- Payment Amount

Note Invoice Amount is a number type custom property. Invoice Date and Payment Date are date type custom properties.

To create these custom properties, complete the following steps.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. On the **Custom Properties** tab, click **New > String**.
3. In the **New String Property** dialog box, in the **Name** box, type `Finance Group` and click **OK**.
4. To create the remaining string type custom properties, repeat the previous steps for each string type custom properties listed above. Apart from Invoice Amount, Invoice Date, and Payment Date, all other custom properties are of string type.

Note When you create a number type custom property, such as Invoice Amount, modify step 2 to click **New > Number** on the **Custom Properties** tab. Similarly, when you create a date type custom property, such as Invoice Date or Payment Date, modify step 2 to click **New > Date** on the **Custom Properties** tab, and then follow the remaining steps.

Create the document type

To create the document type, complete the following steps.

1. In **Management Console**, in the left pane, click **Document Types**.
2. On the **Document Types** tab, click **New**.
3. Under **Select a document type**, type `Invoice` as the document type.

Associate custom properties to document type

To associate the custom properties to document type, complete the following steps.

1. On the **Document Types** tab, under **Select a document type**, select the **Invoice** document type, and click **Modify**.
2. In the **Document Type** dialog box, select the **Custom Properties** tab.
3. Under **Available**, select the custom property you want to associate to the document type and click **Add**.
4. Repeat the previous step till all the custom properties are included under the **Added** list.
5. Click **OK**.

Configure ImageNow Envoy

You must configure the AsqEndpointService envoy service with its corresponding operation and WSDL URL as shown in the table given below. To configure an ImageNow Envoy service, complete the steps given in this section.

Web service	Operation	WSDL URL
AsqEndpointService	InvokeTrigger	<u><a href="http://<IP of the system where Perceptive Connect is installed>:<port number>/ws/workflowTrigger?wsdl">http://<IP of the system where Perceptive Connect is installed>:<port number>/ws/workflowTrigger?wsdl</u>

For more information on configuring ASQEndpointService, refer to the Perceptive Connect document.

1. In **ImageNow**, click **Manage** to open **ImageNow Management Console**.
2. In the **ImageNow Management Console**, in the left pane, click **Envoy Services > New**.
3. In the **Envoy Services** dialog box, in the **Definition** page, set the following attributes.
 1. In the **Name** box, type a name to identify the remote service. For example, ASQEndpointService
 2. Optional. In the **Description** box, type a description of the remote service.
 3. In the **URI** box, type the URI for your connector server in the format **http://<Perceptive ConnectRuntimeServer>/ws/workflowTrigger?wsdl**. For example, <http://localhost:81/ws/workflowTrigger?wsdl>
 4. In the **Authentication** list, select **None**.
 5. Optional. If you want to enable interceptor logging for the remote service, select the **Enable interceptor logging** check box.
4. Click **Next**.
5. In the **Operations** page, in the ASQEndpointService operation, select the check box for **InvokeTrigger**.
6. Click **Finish**.

Create the workflow process

Given below is an example to create a Perceptive Connector for Infor Lawson APIA specific workflow. You may modify the suggested workflow to fit your specific document processing rules.

1. In **Management Console**, in the left pane, click **Workflow**.
2. In the right pane, on the **Workflow** tab, click **New**.
3. In the **Add Process** dialog box, in the **Name** box, type a name, such as Infor Lawson AP Invoice Automation.
4. Optional. In the **Description** box, type a description of the process.
5. Click **OK**.

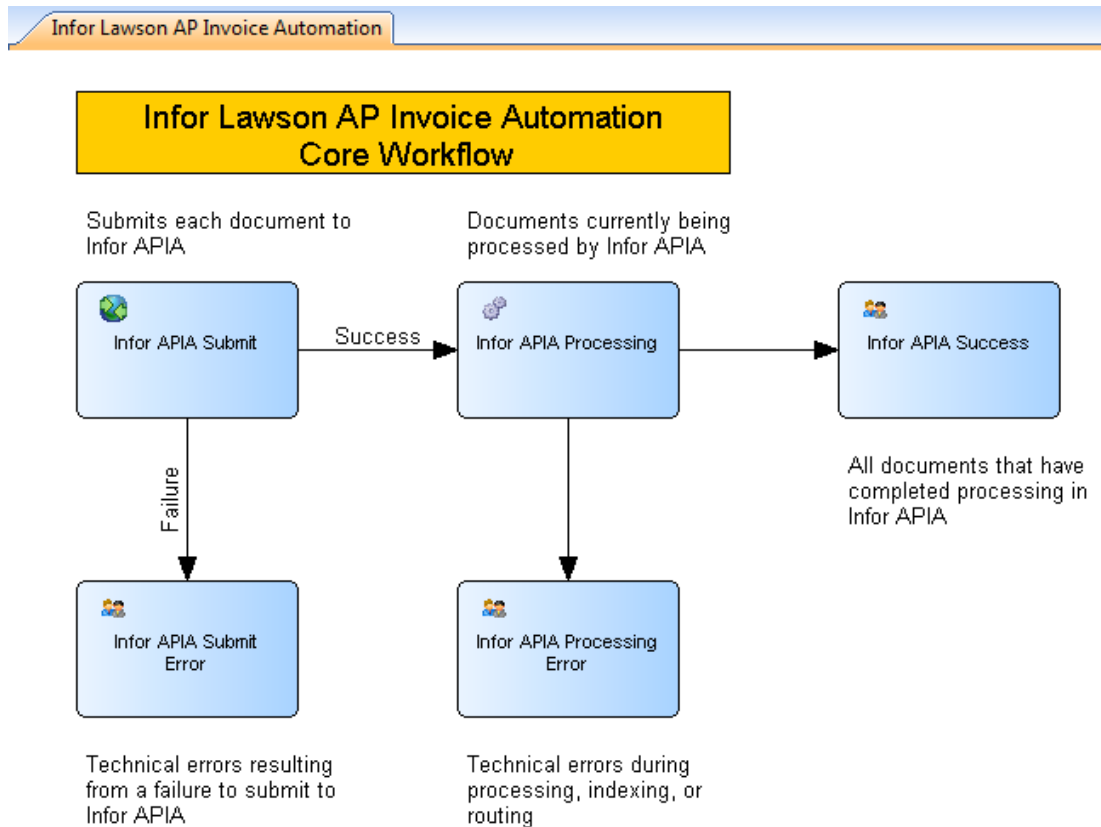
Create the Queues

To trigger the connector process, configure an Integration ASQ, three work queues, and a system queue. The following table describes the queues that you must add in the workflow process.

Queue Name	Queue Type	Description
Infor APIA Submit	ASQ	First queue where the documents are submitted for processing.
Infor APIA Submit Error	Work	Documents are routed to this queue from the Infor APIA Submit queue if a technical error occurs while routing it to the Infor APIA Processing queue.
Infor APIA Processing	System	Documents currently being processed in Infor Lawson APIA are routed to this queue from the Infor APIA Submit queue.
Infor APIA Processing Error	Work	Documents are routed from the Infor APIA Processing queue to this queue if Infor Lawson APIA fails to process the documents.
Infor APIA Success	Work	Documents are routed from the Infor APIA Processing queue to this queue if Infor Lawson APIA processes the documents successfully.

Note When you create the workflow queues manually, it is recommended that you create the queues with names as specified in the table.

The following image displays how the workflow process layout appears in the ImageNow Workflow Designer window. The image includes a brief description for each queue in the workflow.




To add queues in the workflow process, complete the following procedures.

- **Create the Infor APIA Submit Error, Infor APIA Complete, and Infor APIA Processing Error queues**
- **Create the Infor APIA Processing queue**
- **Create an Integration ASQ**


Create the Infor APIA Submit Error, Infor APIA Complete, and Infor APIA Processing Error queues

To create the Infor APIA Submit Error, Infor APIA Complete, and Infor APIA Processing Error work queues, complete the following steps.

1. Select the workflow you created in "Create or open the workflow process" and click **Modify**.
2. In the **Workflow Designer** window, in the left pane, under **Queues**, select the **Work**  queue and drag it to the right in your process diagram. Repeat this step to create two other work queues.
3. Double-click the first work queue, and in the **Queue Properties** dialog box, in the **Name** box, type **Infor APIA Processing** and click **OK**.
4. Repeat the previous step to name other two queues **Infor APIA Complete** and **Infor APIA Processing Error**.


Create the Infor APIA Processing queue

To create the Infor APIA Processing queue, complete the following steps.

1. In the **ImageNow Workflow Designer** window, in the left pane, under **Queues**, select **System**  and drag it into your process diagram to the right.
2. Double-click the **System** queue and in the **Queue Properties** dialog box, in the **Name** box, type **Infor APIA Processing**.
3. In the left pane, click **Routes**, and under the **Routes Out** tab, click **Add**.
4. In the **Add Route Out** dialog box, select **Destination** tab.
5. In the **Available queues** box, select **Infor APIA Success**, and then click **Add**.
6. Click **OK** to close the **Add Route Out** dialog box.
7. To add the Infor APIA Processing Error queue, repeat the steps from 3 to 6.
8. Click **OK**.

Create an Integration ASQ


To create the Integration automated system queue (ASQ) in the workflow process you created, complete the following steps.

1. In the **ImageNow Workflow Designer** window, in the left pane, under **Queues**, select **Integration**  and drag it into your process diagram to the right.
2. Double-click the Integration queue and in the **Queue Properties** dialog box, in the **Name** box, type a name for the queue.
3. Under **Automated Action**, set the following attributes.
 1. Under **Success Action**, in the **Process** list select the workflow process and in the **Queue** list select **Infor APIA Processing**.
 2. Under **Failure Action**, in the **Process** list select the workflow process and in the **Queue** list select **Infor APIA Submit Error**.
 3. Under **Envoy Service**, in the **Service Operation Name** list, click the Envoy Service name, such as ASQEndpointService::InvokeTrigger.
 4. Click **OK**.

Configure Infor Lawson AP Invoice Automation connectivity

You can configure multiple Infor Lawson connections in the connector. To configure the Infor Lawson connection, complete the following steps.

1. In **Perceptive Connect Runtime Web Console**, under **Perceptive Connect**, click **View Configuration**.
2. In the **View Configuration** page, under **Perceptive Content Connector**, click **Integration Server 6.7 Connection**.
3. In the **Integration Server 6.7 Connection** dialog box, ensure that the **Integration Server URL** field displays the correct URL.

4. Navigate back to the **View Configuration** page, and under **General**, click the **Edit the configuration values**  button next to **Infor Lawson APIA Configuration**.
5. In the **Infor Lawson APIA Configuration** dialog box, complete the following steps.
 1. In the **Invoice Header wsdl** box, enter the Infor Lawson wsdl for Invoice header posting.
 2. In the **Invoice Detail wsdl** box, enter the Infor Lawson wsdl for Invoice line posting.
 3. In the **Base URL Indicator** list, select the appropriate version name of WebNow or Perceptive Web.
 4. In the **Perceptive Web url** box, type the Perceptive Web URL that facilitates viewing of invoice.
 5. In the **WebNow url** box, type the WebNow URL that facilitates viewing of invoice.
 6. Select the **Anonymous login** check box to allow users to view invoices stored in ImageNow from Infor Lawson without logging in.
 7. Select the **Enabling Success Message** check box to enable adding of success messages to the **Notes** box of the ImageNow document.
 8. Select the **Enabling Error Messages** check box to enable adding of error messages to the **Notes** box of the ImageNow document.
 9. Click **Save**.

Configure Infor Lawson to use the connector

The Infor Lawson application needs to be configured to work with the Perceptive Connector for Infor Lawson APIA. To configure Infor Lawson, in the Infor Lawson settings, include the <http://<server name>:<port>/ws/LawsonSyncOperations?wsdl> URL. This exposes the webservice that enables the Infor Lawson connector to connect with the following web-methods.

- GetDocumentPage
- GetDocumentUrl
- UpdateInvoice