



# Archer® Suite

6.9

## Advanced Workflow Content Assistant Implementation Guide

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## Release Notes

### Release 6.9

#### Changed Features

Archer Advanced Workflow Content Assistant Tool & Utility has been updated to work with Archer 6.9.

# Chapter 1: Overview of Archer Advanced Workflow Content Assistant

## About Archer Advanced Workflow Content Assistant

As business processes for your organization change and improve to meet business demands, it is sometimes necessary to change the advanced workflow business flow for an application. When an advanced workflow process change is ready to be deployed, sometimes a large number of jobs in the existing workflow process need to be canceled from the current workflow process and re-enrolled in the new workflow.

The Archer Advanced Workflow Content Assistant provides a desktop utility to manipulate certain data conditions regarding Archer content and its enrollment in Archer Advanced Workflow. This tool enables the bulk cancellation of a list of Archer content records out of Archer Advanced Workflow. Perform a bulk enrollment of a list of Archer content records into Archer Advanced Workflow. This tool provides a mechanism to efficiently manage bulk actions for items within the Archer Advanced Workflow process.

Use the Archer Advanced Workflow Content Assistant (AWFCA) utility to perform the following tasks:

- Cancel multiple Archer Advanced Workflow jobs.
- Enroll content.

Determine which records to include in either a bulk cancellation, or bulk enrollment procedure by performing an advanced search within Archer. Once the search is completed, export the search results into a CSV file by using the tracking ID configured for the system ID and save the CSV file in a location of your choosing. To bulk cancel or to bulk enroll jobs, import the CSV file into the AWFCA and select the records to be included in the procedure.

### Important Considerations

- The Archer Advanced Workflow Content Assistant (AWFCA) has been developed and validated against all Archer Platform releases from 6.1 to 6.9.

Note: this offering is available for on-premise implementations only.

- You must have Administrator rights, be a part of the Sysadmin role group, and enter a valid Archer Username and Password to log in to the AWFCA.
- Previous installations of the AWFCA must be uninstalled before a new version is installed.
- Each imported CSV file must not contain more than 5,000 records.
- Always use a tracking ID configured for the system ID for the AWFCA to enroll jobs regardless of what type of field you are using as the key field.

# Chapter 2: Installing Archer Advanced Workflow Content Assistant

## Installation Overview

Install the Archer Advanced Workflow Content Assistant (AWFCA) in the same server location where the Archer Configuration Service resides (your IT Administrator can provide this information), or you can install the AWFCA on a standalone client within the local network. If the AWFCA has been previously installed, the previous installation must be uninstalled before proceeding to a new installation.

Note: If you are installing the AWFCA on a standalone client, edit the config file (C:\ProgramFiles\RSA\AWFCA\Integration.AWFCA.exe.config) IP address to point to your config service. To edit the file, open it in Notepad as an Administrator and edit the config service URL. In addition, you'll need to install the Archer Configuration Certificate into the Personal Certificate Store on the PC attempting to connect to the Archer Configuration service. If you are unable to connect to your config service due to a restrictive firewall, refer to your IT department to obtain proper networking permissions, or deploy the AWFCA on the same server location where the Archer Configuration Service reside.

## Uninstall Previous Versions of Archer Advanced Workflow Content Assistant

1. Locate the AWFCA application file on the server or on the stand-alone client where the AWFCA application is installed. The default location is Control Panel > Programs > Programs and Features. Depending on the operating system (OS) being used, Control Panel is available from the Start menu or from the Administrative Tools menu.
2. Right-click the AWFCA application file.
3. Click Uninstall.

## Install Archer Advanced Workflow Content Assistant

1. Download the installation file (AWFCA.Setup.msi) based on the version of Archer that you are using.
2. Note: There are multiple versions of the installation file for multiple versions of Archer. Please refer to the application menu and download the installation file version that is associated with the version of Archer you are using.
3. Double-click the AWFCA.Setup.msi file to install the AWFCA.
4. On the Welcome to the AWFCA Setup Wizard screen, click Next.

5. Select the installation folder and user permissions.
  - a. The default installation path displays C:\Program Files\RSA\AWFCA. You can change this during installation. Optionally, click Browse and select a different location.
  - b. Select either the Everyone radio button or select the Just me radio button. Different AWFCA icons are installed on the desktop or on the Start menu depending upon which radio button option is selected.
  - c. Click Next.
6. Click Next on the Confirm Installation window to start the installation.
7. On the Installation Complete window, click Close.

## Chapter 3: Using Archer Advanced Workflow Content Assistant

1. Log in to the host machine as an Administrator.
2. Verify that the Configuration Service is running. If the Configuration Service is not running, start it.

Note: If you are installing the AWFCA on a standalone client, skip to step 3.

To verify the status of the Configuration Service, or to start the Configuration Service, do the following:

- a. Open the Services window on the host machine by navigating to Start > Administrative Tools > Control Panel > Services.
  - b. Locate the Configuration Service in the displayed list. If the Configuration Service is running, the status column displays Running on the same row where the Configuration Service is listed. If the status column row is blank, the Configuration Service is not running and you need to start the Configuration Service. To start the Configuration Service, do the following:
    - i. Locate the ArcherTech.Services.ConfigurationService.exe file on the host machine.
    - ii. Right-click the executable file.
    - iii. Follow the prompts.
3. Double-click the AWFCA icon to start the application.
  4. On the AWFCA login screen, use the drop-down menus to enter the information for each field.
    - Archer Instance: Select the Archer Instance

- SQL Server Name: (automatically populated when the Archer Instance is selected)
  - Database Name: (automatically populated when the Archer Instance is selected)
  - User name: Your Archer ID
  - Password: Your Archer password
5. Under the Import section, select either Cancel or Enroll for the function you want to perform with the AWFCA. You can only select one function for each process cycle. Cancel is selected by default.

Note: You must always use a tracking ID for the AWFCA to enroll or cancel jobs regardless of what field type you are using as the key field.

6. To bulk cancel or to bulk enroll jobs, click the Open CSV button and import content from a CSV file into the AWFCA. Before importing the CSV file, edit the file content to remove any field names or labels that exist within the data. Once the CSV content is successfully imported, it is listed in the Display section.

Note: If content is not selected by default in the Select column after importing the CSV file, the status of the record is not ready for cancellation or enrollment.

7. Select which content you want to include in the process you selected in the Import section from Step 3. For each update process, you can only select the Cancel option or the Enroll option, not both.
- To select all content listed in the Display section, click the Select All button. All checkboxes next to the displayed content are selected, indicating that those items are to be included in the process you selected in Step 3.
  - To clear all content listed, click the Clear All button to clear all of the checkboxes. All checkboxes next to the displayed content are cleared, indicating that those items are not to be included in the process you selected in Step 3.

Note: Content can also be selected or cleared individually by clicking the checkbox next to each item.

8. Click Check Advanced Workflow Service to verify that the workflow service is running. If the workflow service is running, a status indicator of Service is running displays next to the Check Advanced Workflow Service button. If the workflow service is not running, an error message displays. If the workflow service window is not running, start the workflow service before proceeding. To start the workflow service, follow these steps:
- a. Log in to the host machine as an Administrator.
  - b. Locate the ArcherTech.Services.WorkflowService.exe file on the host machine.

- c. Right-click the executable file.
  - d. Follow the prompts.
9. Click **Cancel Advanced Workflow Jobs** to cancel the selected jobs, or click **Enroll** to enroll the selected jobs.
- If you selected **Cancel** in the **Import** section, the content listed in the **Display** section will be canceled if the checkbox next to the job is selected.
  - If you selected **Enroll** in the **Import** section, the content listed in the **Display** section will be enrolled if the checkbox next to the job is selected.
10. Select either **Yes** or **No** on the confirmation pop-up window.
- Click **Yes** to proceed with the function selected. If **Yes** is clicked, all selected items are included in the process selected in the **Import** section of Step 3. A progress bar indicates the status of the procedure.
  - Click **No** to stop the function selected.
- Note: Depending on the version of Archer you are using, a successful cancellation procedure is indicated in the **JobStatus** column by a status of **Canceled** or **Complete**. Successful enrollment procedures are indicated by a **JobStatus** of **Complete**. The **Process** window also displays a ratio of completed jobs (for example, 26/26 have been successfully enrolled).
11. Upon successful completion, the **Process Log Export** link is enabled, and a count ratio of successful jobs is displayed. Click the **Process Log Export** link to display the **Save As** window. You can save the log file as a text (.txt) file or as an Excel (.xlsx) file in any location you choose. To save the log file, enter the location where the file is to be saved, enter a file name, and determine the file type. Click **Save**.

## Chapter 4: Troubleshooting the Archer Advanced Workflow Content Assistant

### Common Causes for Failure

- User has included more than 5,000 records in the imported CSV file batch. The process will fail if more than 5,000 records are imported per batch. Reduce the import file to 5,000 records or fewer and begin the process again.
- Not all of the selected jobs were successfully canceled (for example, 350/400 jobs have been canceled). In this scenario, a log file is created, displaying basic information on the records that failed. The log file includes:
  - The Content ID of the record which failed

- The error message back from the Advanced Workflow Service and why it failed
- The log file name and the error message explaining the job failure
- Content ID does not exist in the application. Solution: Verify that the content ID in the CSV file matches the key fields in the application or questionnaire. If the content no longer exists (if it was deleted), delete the content ID in the file and re-import it.
- Archer Workflow Service is not running. Solution: Verify that the ArcherWorkflowService is running on the configuration server.
- Archer Advanced Workflow Configuration does not allow for re-enrollment. Solution: Check the Allow Re-Enrollment box in the Advanced Workflow Designer for your application or questionnaire.
- Stopping the Advanced Workflow Service before the cancellation or enrollment process has completed will cause a failure of the AWFCA.
- Attempting to enroll or cancel the same record set while two or more instances of the tool are running simultaneously will cause a failure.

## Appendix A: Certification Environment

**Date Tested:** September 2022

Product Name	Version Information	Operating System
Archer	6.12	Windows