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Your business problems have changed.
Why hasn't your integration solution?

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Use Case: Creating Custom Reports

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High level scenario

In this example we will create a custom Wire Transfer report based on an Account ID which is passed as a parameter through a web form. This Use Case consists of following items:

1. Design a report template in iReport designer
2. Integrate the report template into Adeptia
3. Execute the report generation dynamically by passing a parameter in an orchestration

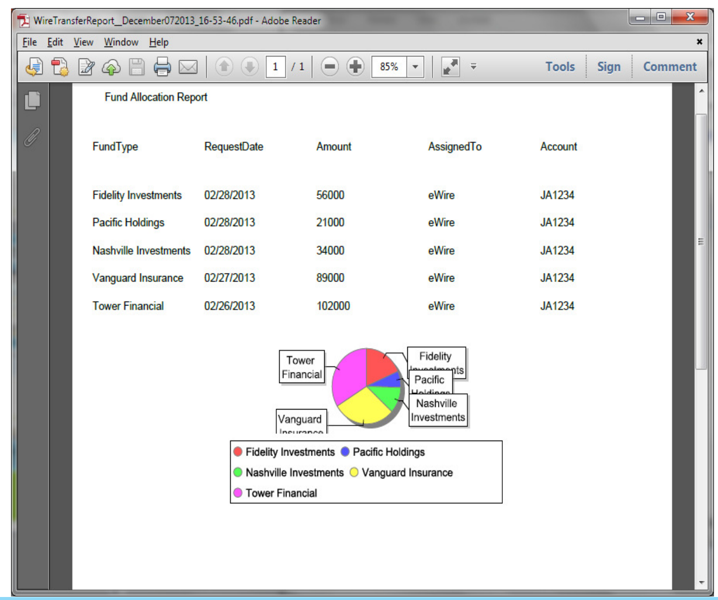
Refer to the Use Case video and the deployable solution file for more information.
Requirement: iReport + Adeptia Suite install with license key that includes Custom Report.

Wire Transfer Report

Wire Transfer data

Fetched 7 records

FundType	RequestDate	Amount	AssignedTo	Account
Fidelity Investments	02/28/2013	56000	eWire	JA1234
Pacific Holdings	02/28/2013	21000	eWire	JA1234
Nashville Investments	02/28/2013	34000	eWire	JA1234
Vanguard Insurance	02/27/2013	89000	eWire	JA1234
Tower Financial	02/26/2013	102000	eWire	JA1234
Pimco Index	07/12/2013	30000	eNet	RS5678
Chase	07/19/2013	9000	eNet	RS5678



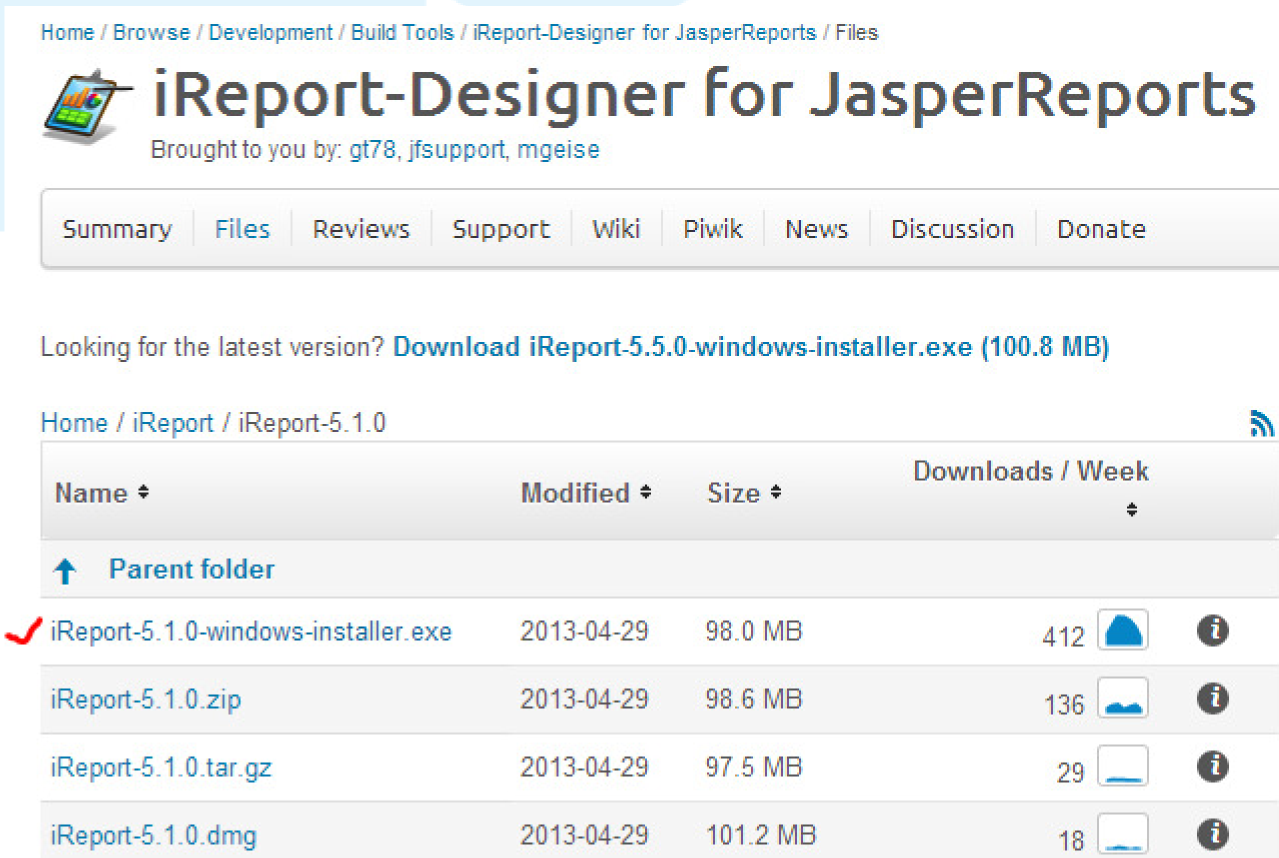
Setup of iReport and a report template

Setup Step 1: Download and install iReport

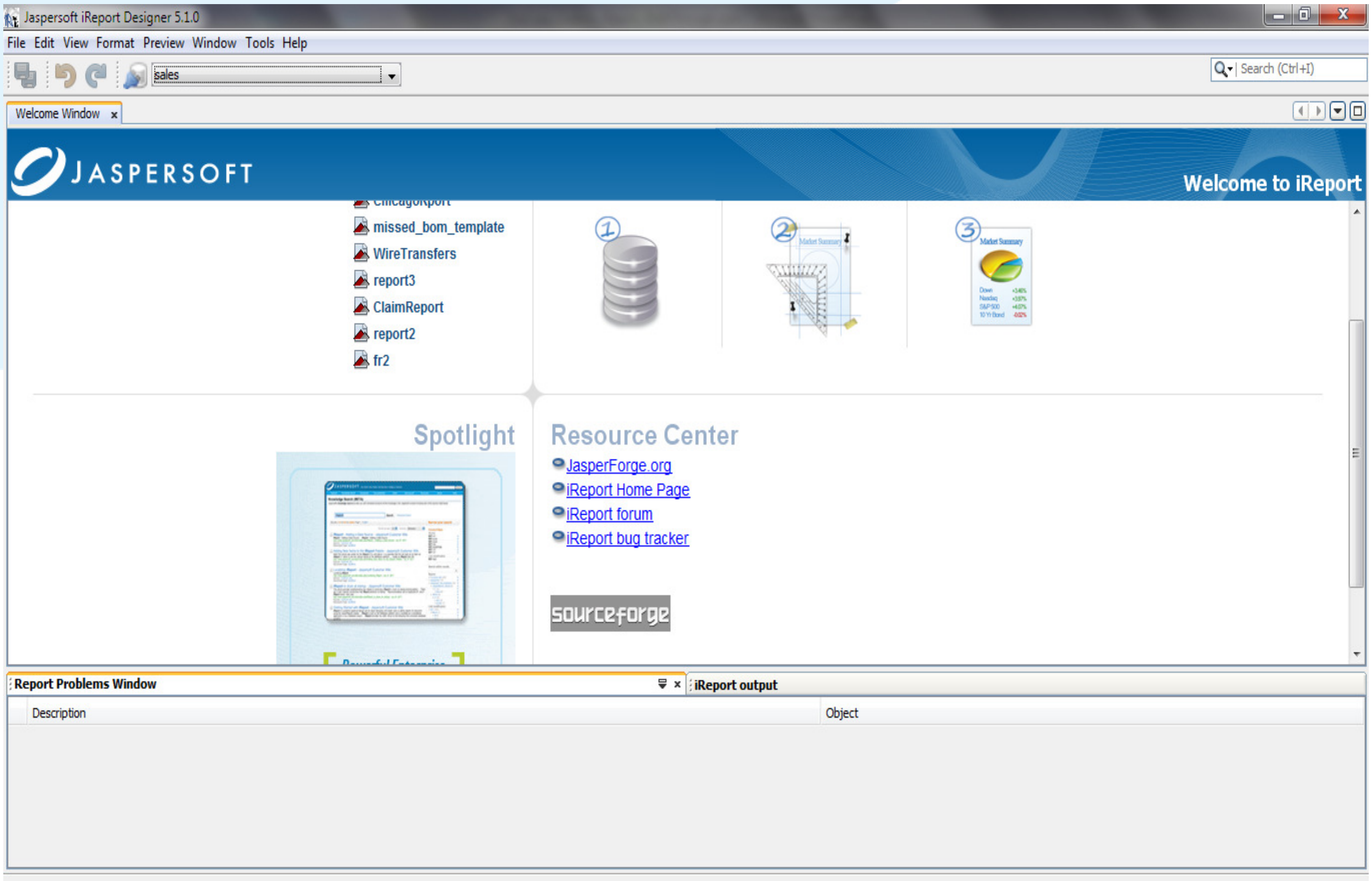
http://sourceforge.net/projects/ireport/files/iReport/iReport-5.1.0/

Note: link may change so a better option is to search ‘download iReport’.

If you have iReport already installed skip to Step 2.



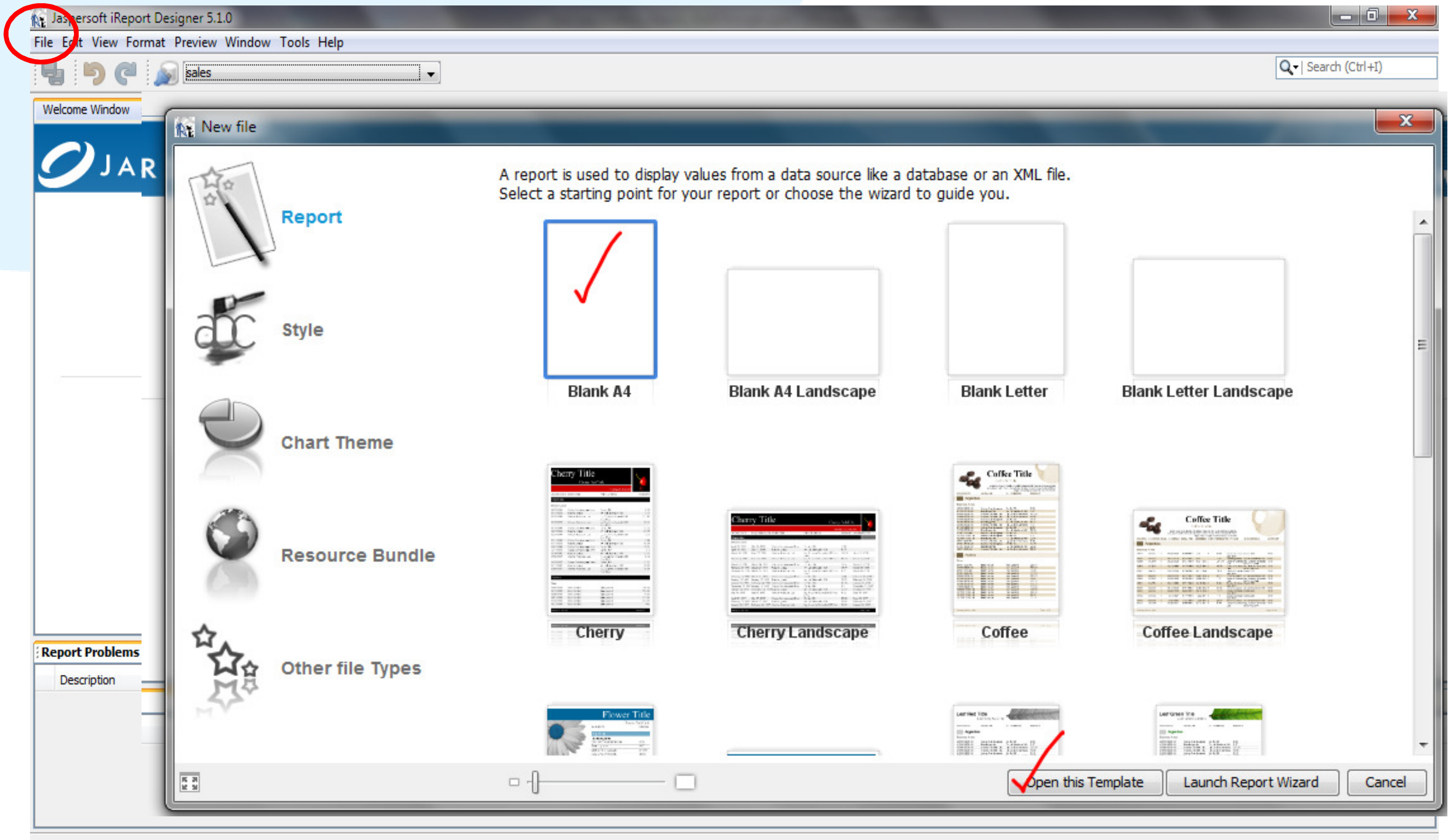
Setup Step 2: Open iReport Designer



Setup Step 3: Let’s first setup a blank template

Click on File (top left) and then New.

Select the ‘Blank A4’ and click on ‘Open this Template’ button located at the bottom.



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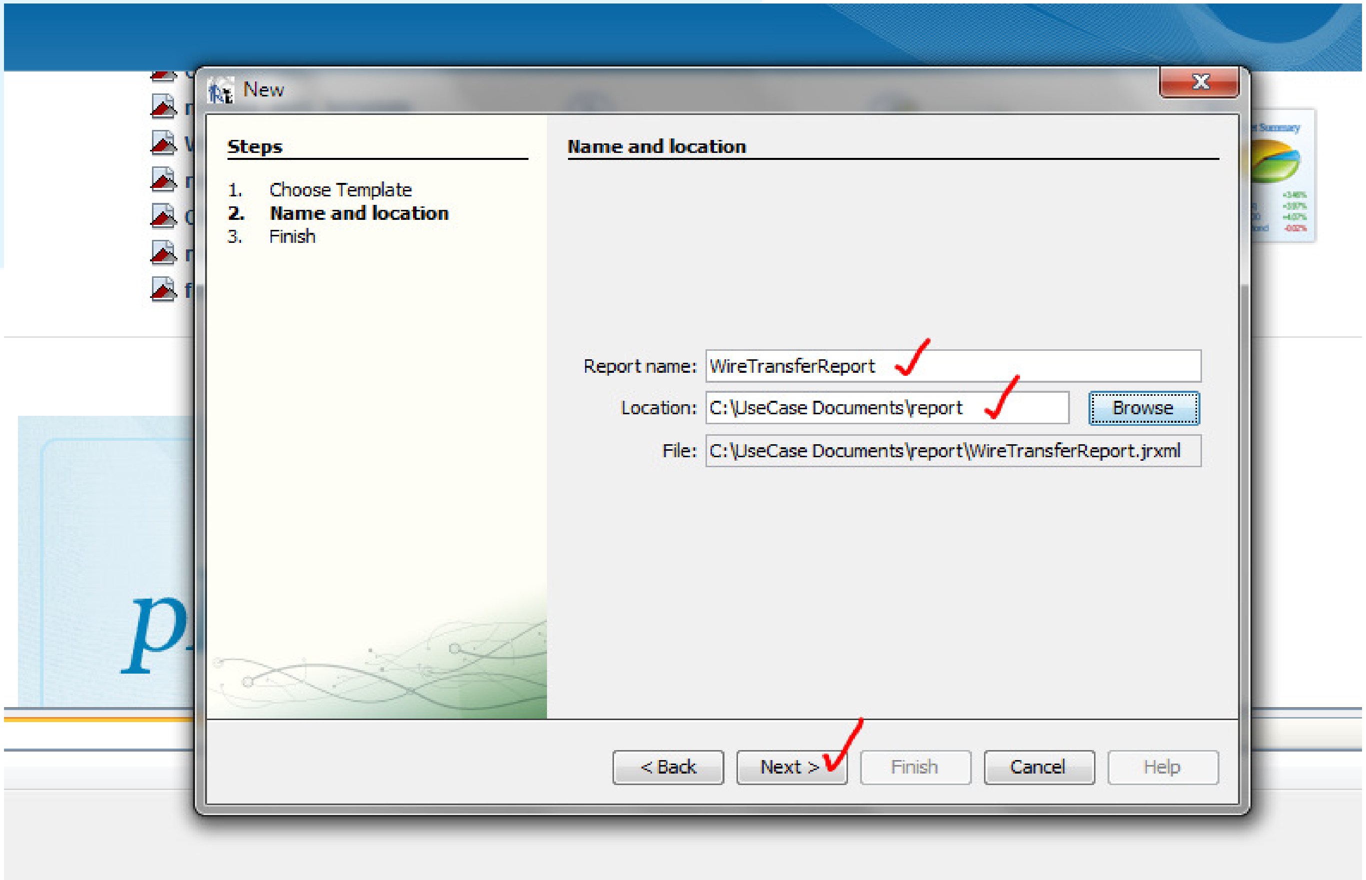
Setup Step 4: Give a name and path for your report template

The name and path can be configured in this screen as shown here.
For example this report has a name ‘WireTransferReport’ and its template is stored at the path selected in the ‘Location’ field. Click Next.



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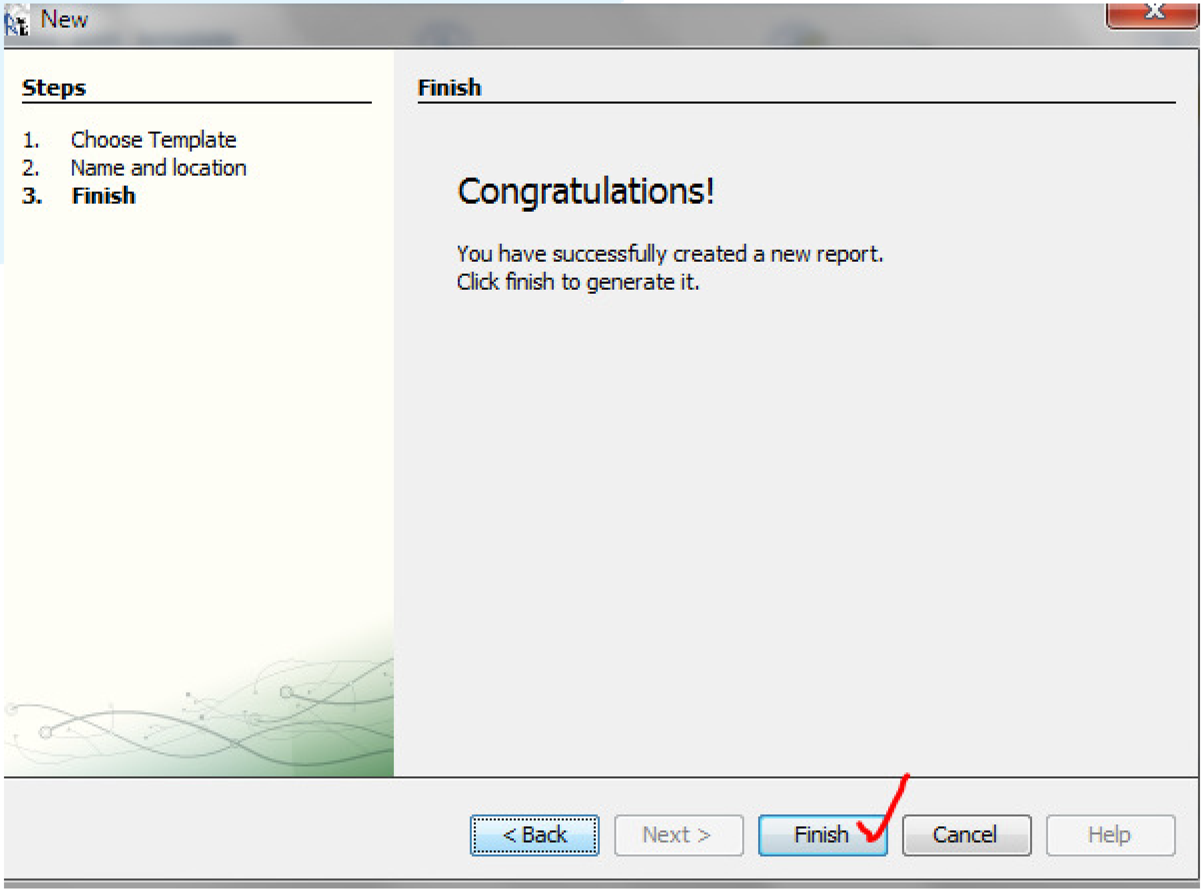
Setup Step 5: Click Finish and the template is ready for design

Click Finish.



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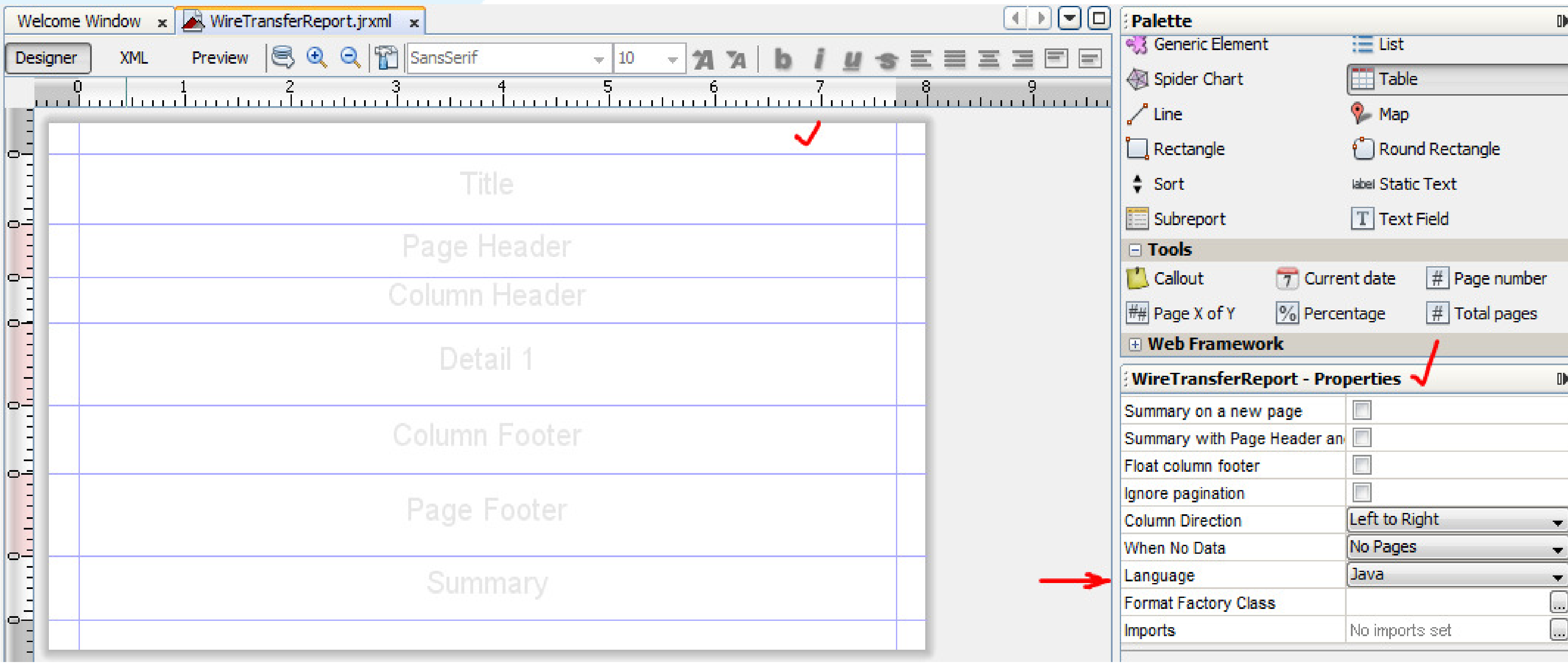
Setup Step 6: Change General properties of the template

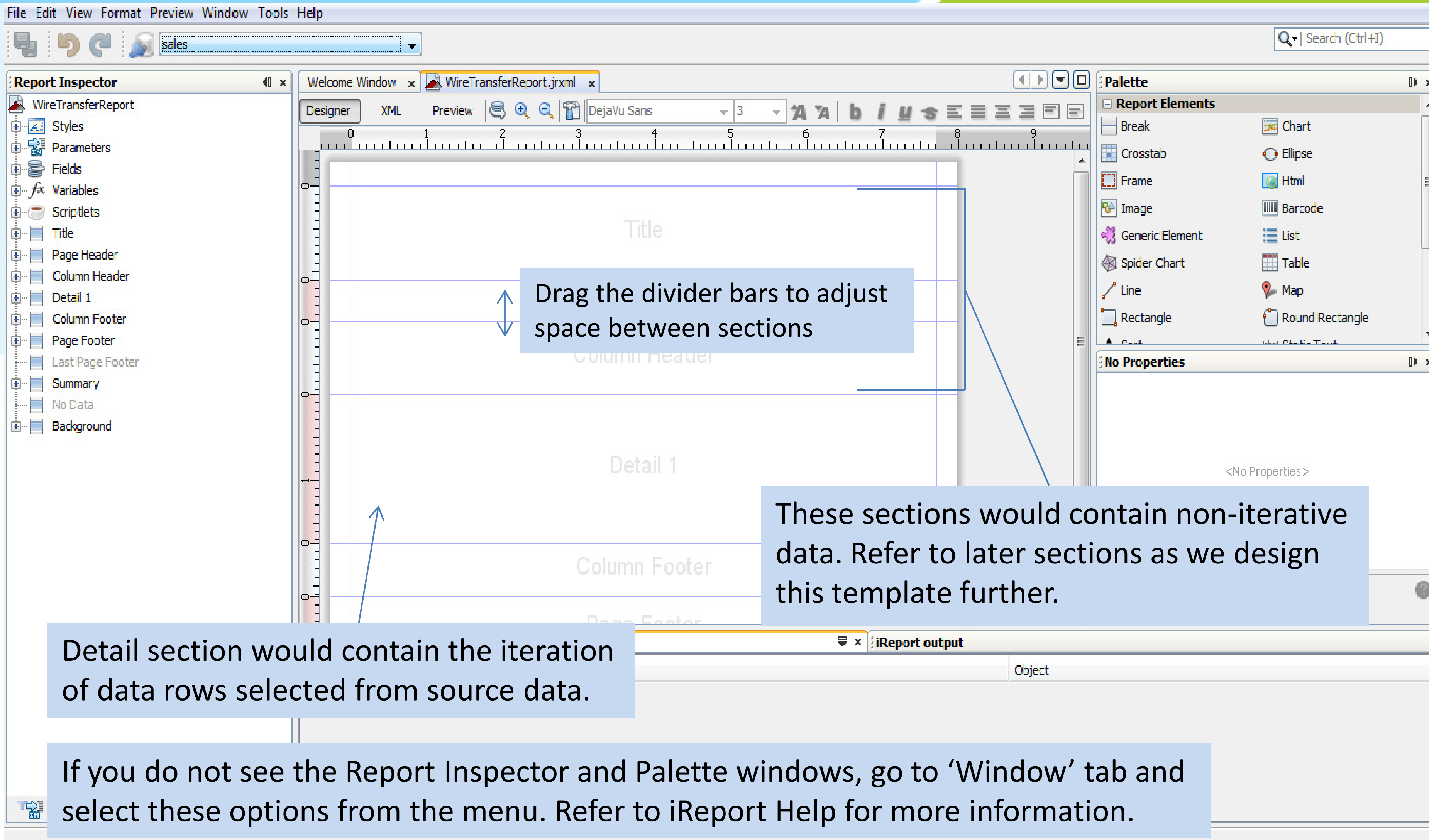
Change the ‘Language’ property of the Report by clicking on the area **above Title** and then Going to the Properties panel and change the Language from ‘Groovy’ to ‘Java’.

Note: For Adeptia version prior to 6.1 you would need to change the compatibility mode of this Report by going to Tools > Options > Under iReport click on Compatibility tab and select 3.5.1 version from the list.



Custom Report template Design

Design Step 1: Understand the layout of the template



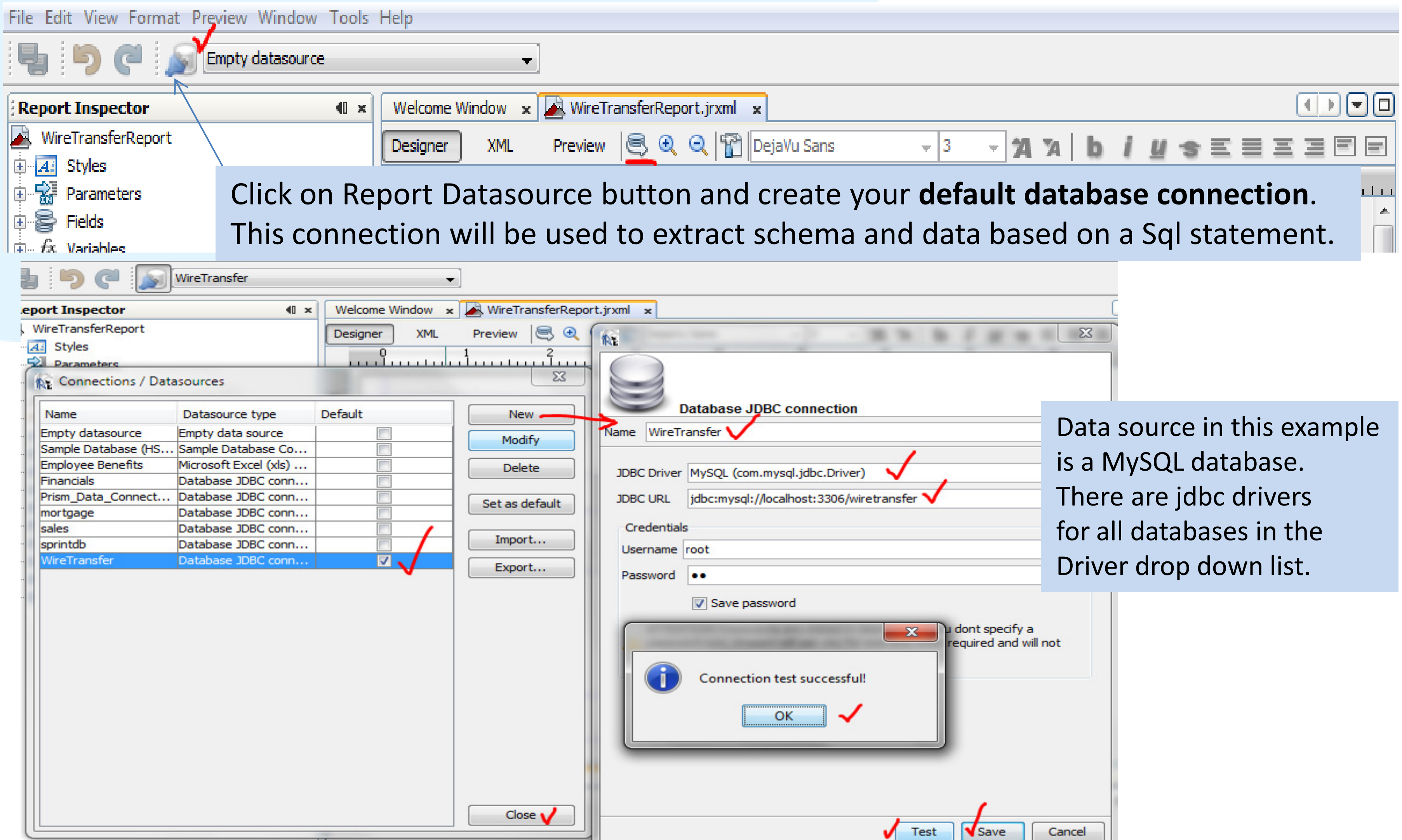
Drag the divider bars to adjust space between sections

These sections would contain non-iterative data. Refer to later sections as we design this template further.

Detail section would contain the iteration of data rows selected from source data.

If you do not see the Report Inspector and Palette windows, go to ‘Window’ tab and select these options from the menu. Refer to iReport Help for more information.

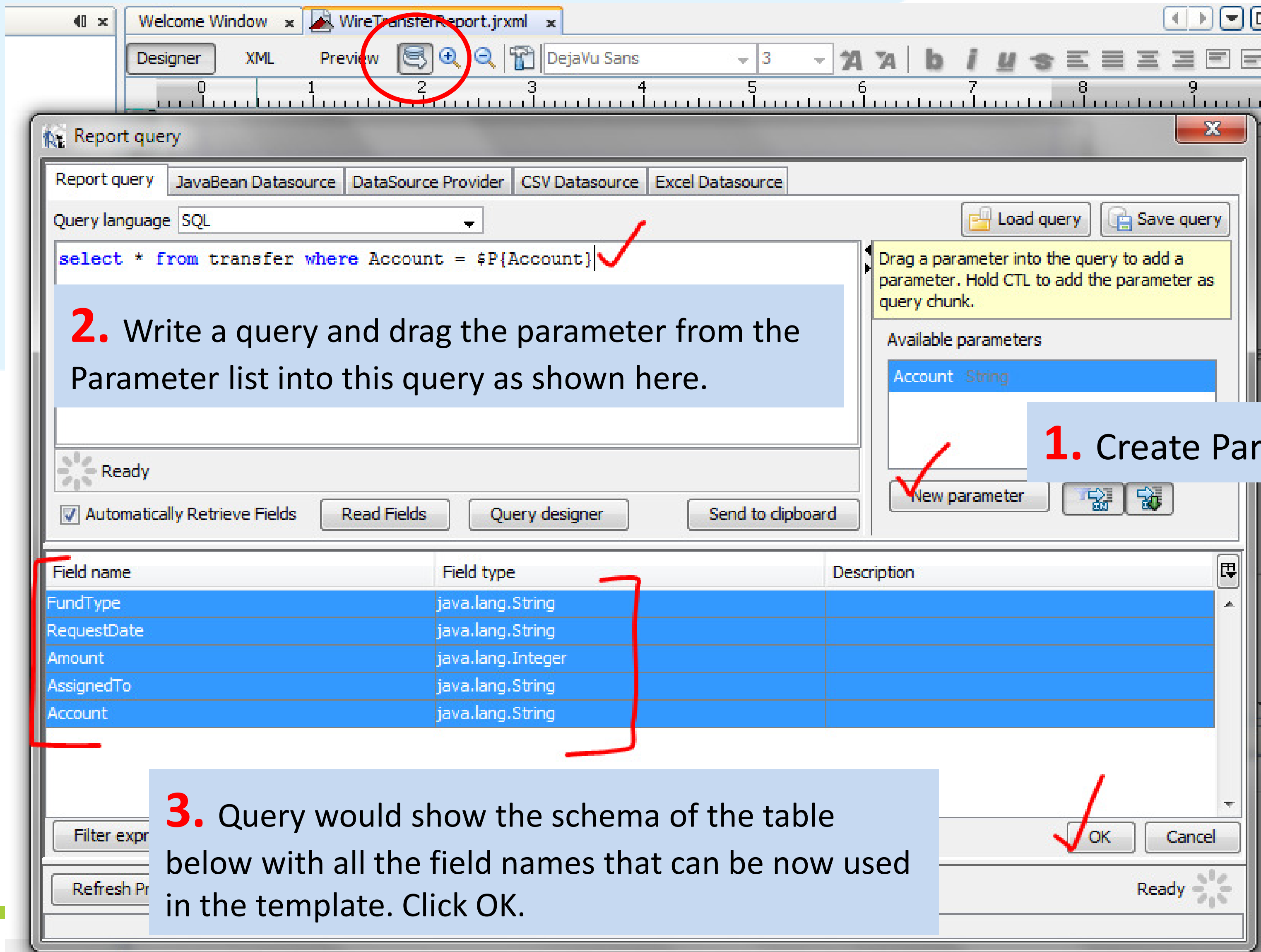
Design Step 2: Configure source database connection



Click on Report Datasource button and create your **default database connection**. This connection will be used to extract schema and data based on a Sql statement.

Data source in this example is a MySQL database. There are jdbc drivers for all databases in the Driver drop down list.

Design Step 3: Configure Report query



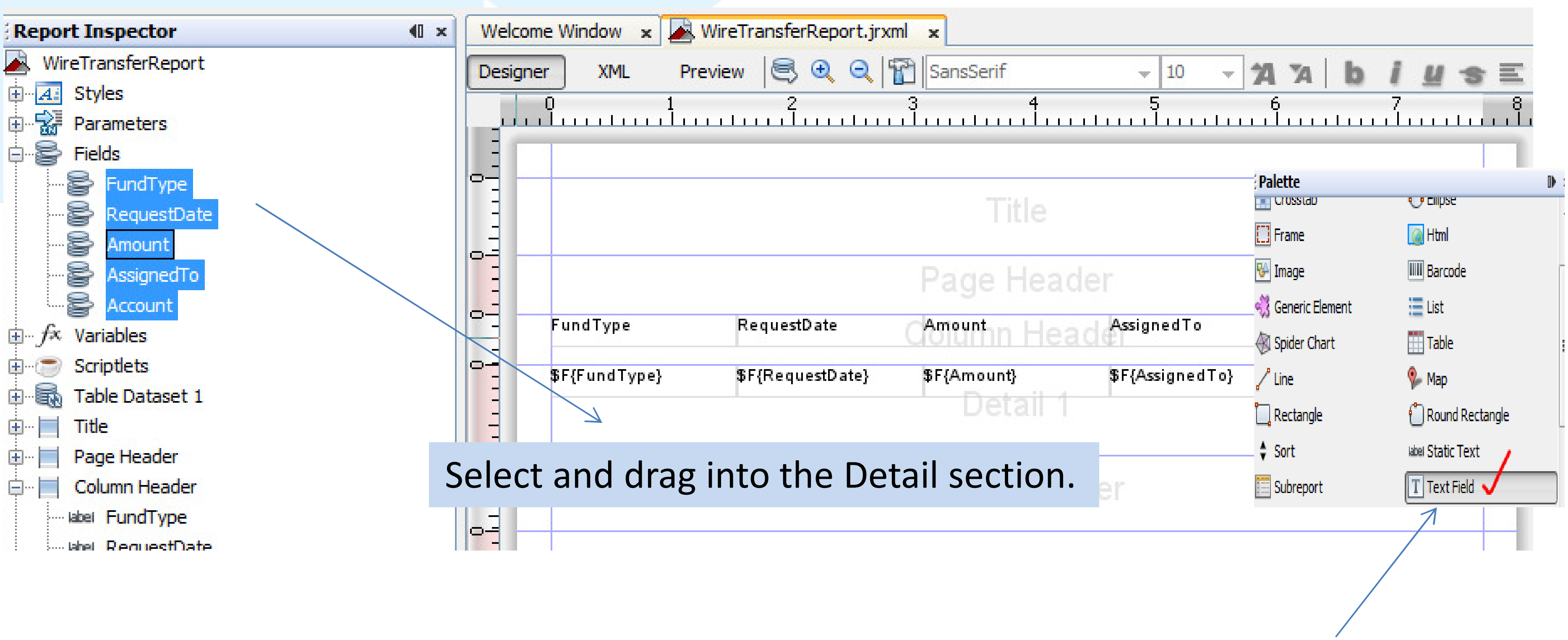
1. Create Parameter

2. Write a query and drag the parameter from the Parameter list into this query as shown here.

3. Query would show the schema of the table below with all the field names that can be now used in the template. Click OK.

Design Step 4: Drag the field names into the Detail section

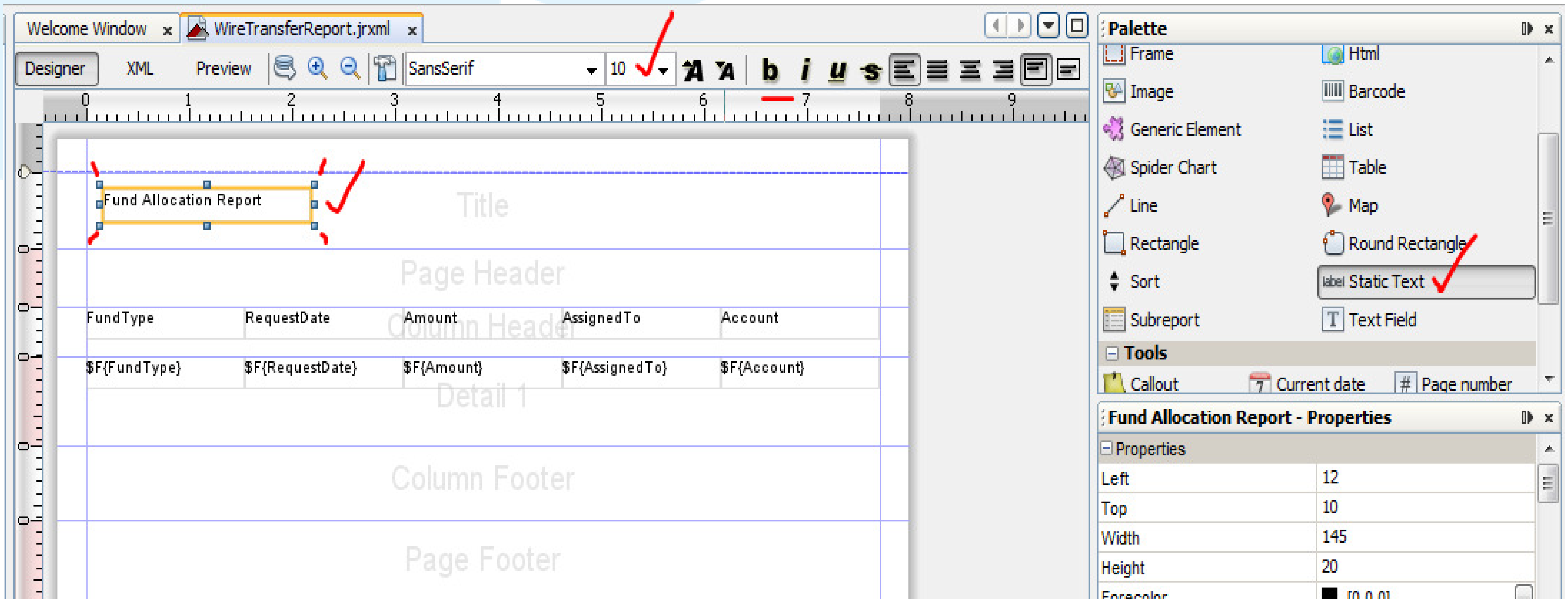
Press SHIFT key and select all the fields under the ‘Fields’ list and drag them **into the Detail area** of the report canvas. It will automatically show all the fields in the Detail area along with the field names in the Column header area as shown below. You can also drag each field individually **into the Detail area.**



You can also drag ‘Text field’ from the Palette into the canvas and configure the field name inside the brackets $F{field} by right clicking on the field and using edit expression option.

Design Step 5: Let's add a Title

Drag the 'Static Text' from the Palette into the Title section and change the font type or size.
Make sure the entire text is visible as you make text bigger by expanding the edges of the text box.



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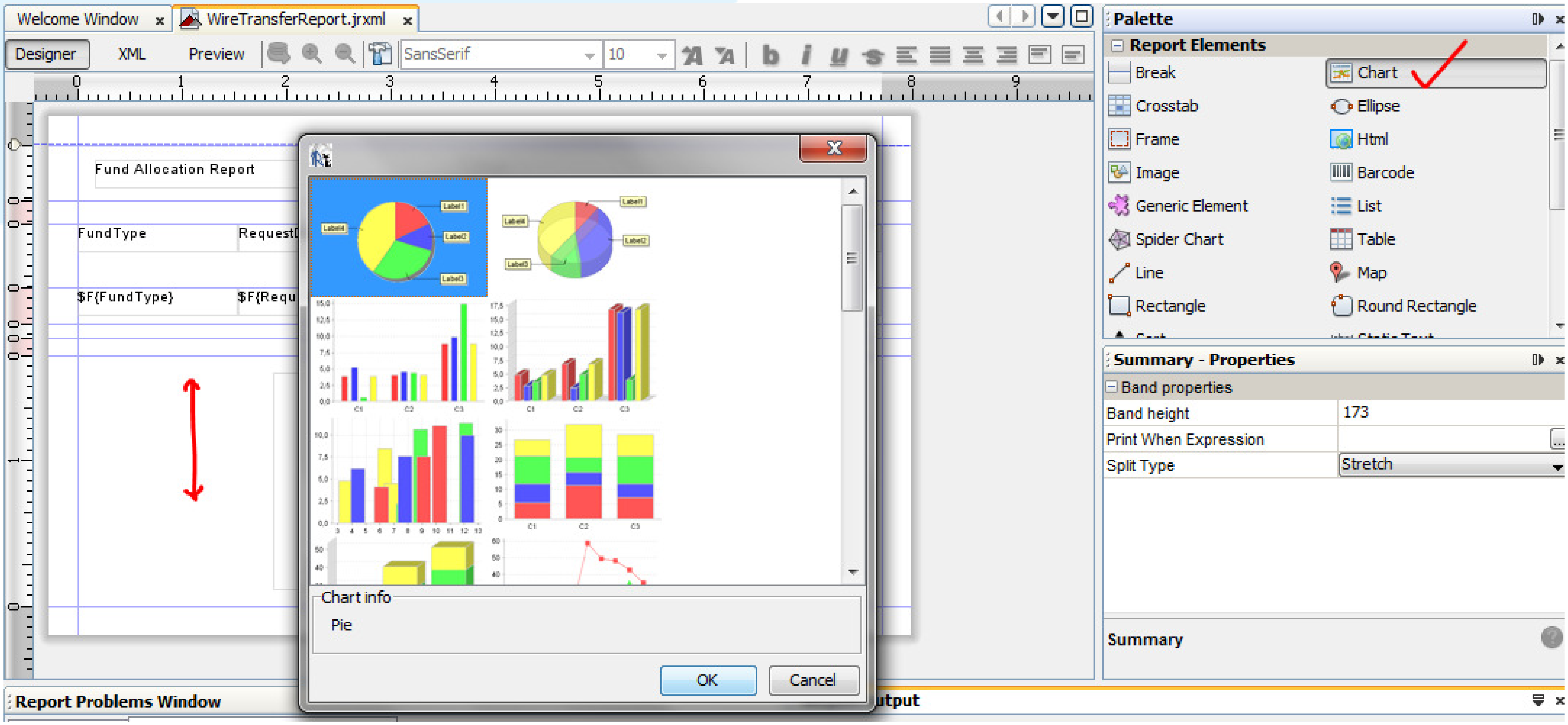
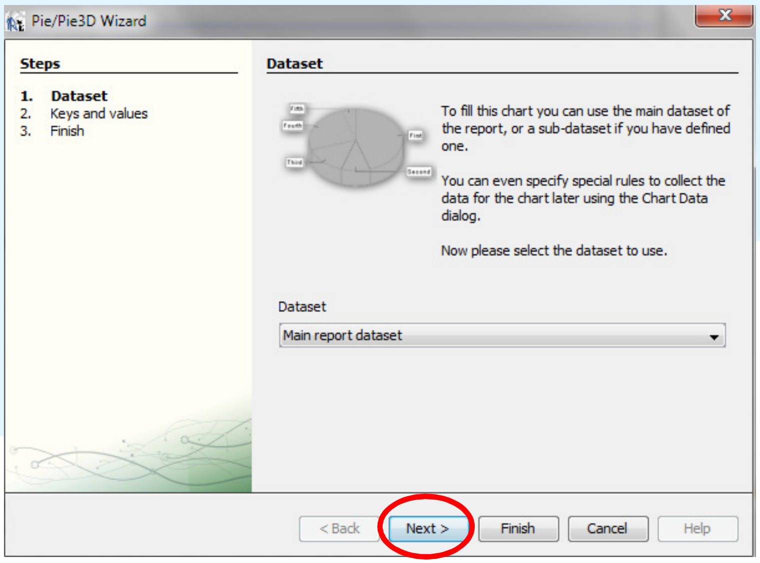
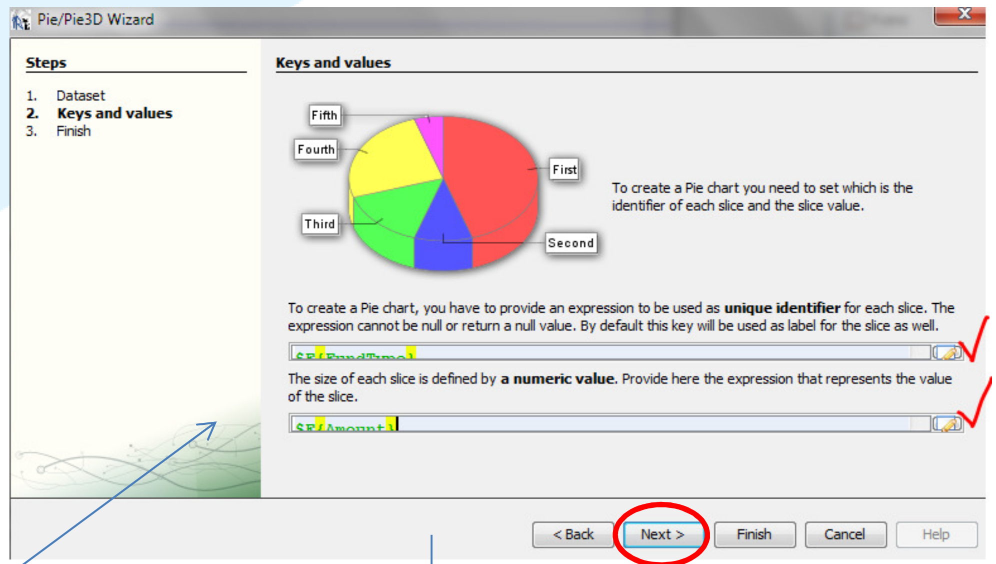
Design Step 6: Let's add a Chart

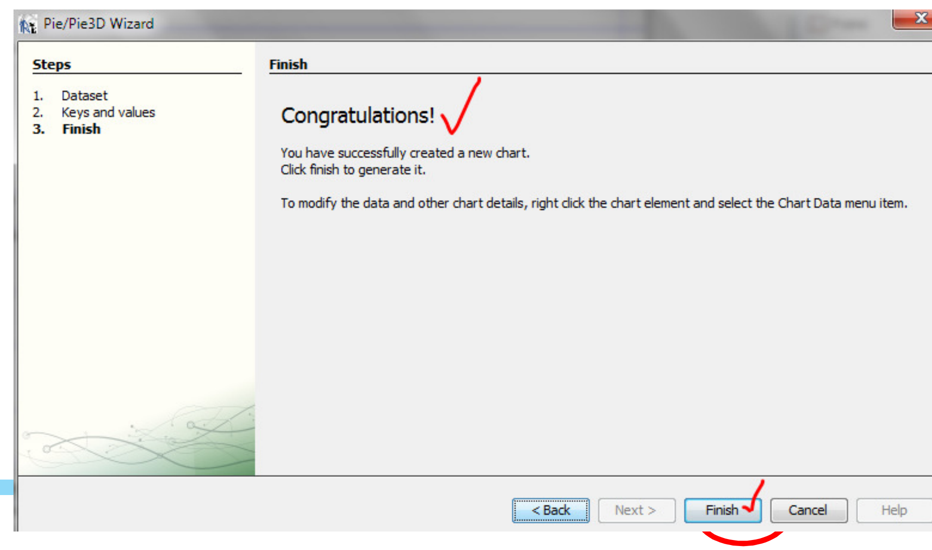
Expand the Summary section and click on Chart in the Palette. In this example we have chosen Pie chart and click OK. Drag the divider bars of the other sections closer to each other and make space for the Summary section where the Pie chart will be inserted.



Design Step 5: Let’s add a Chart (contd.)







Select a unique key (string) in the first field.
Select a numeric field in the second field.

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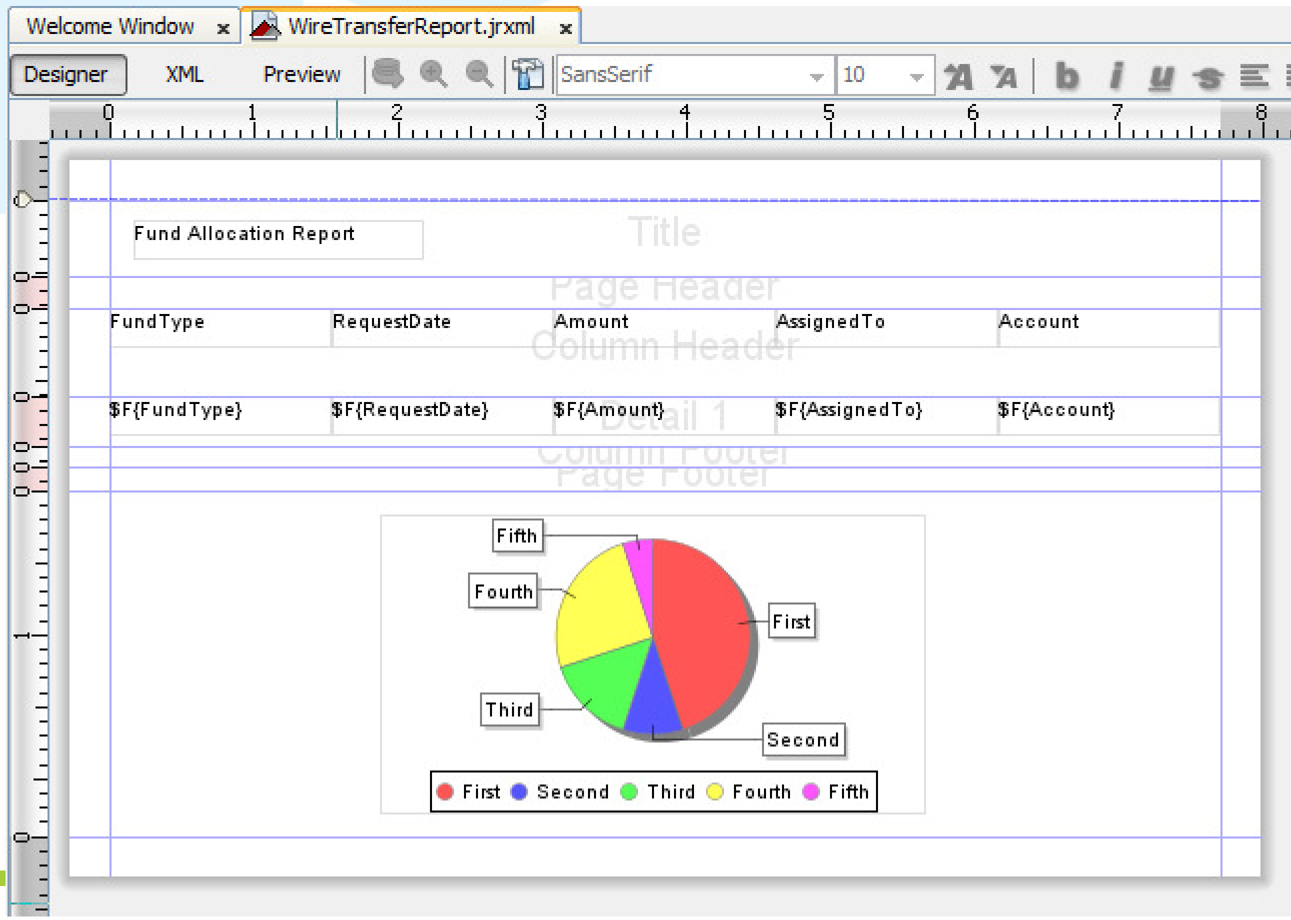
Design Step 5: Let's add a Chart (contd.)

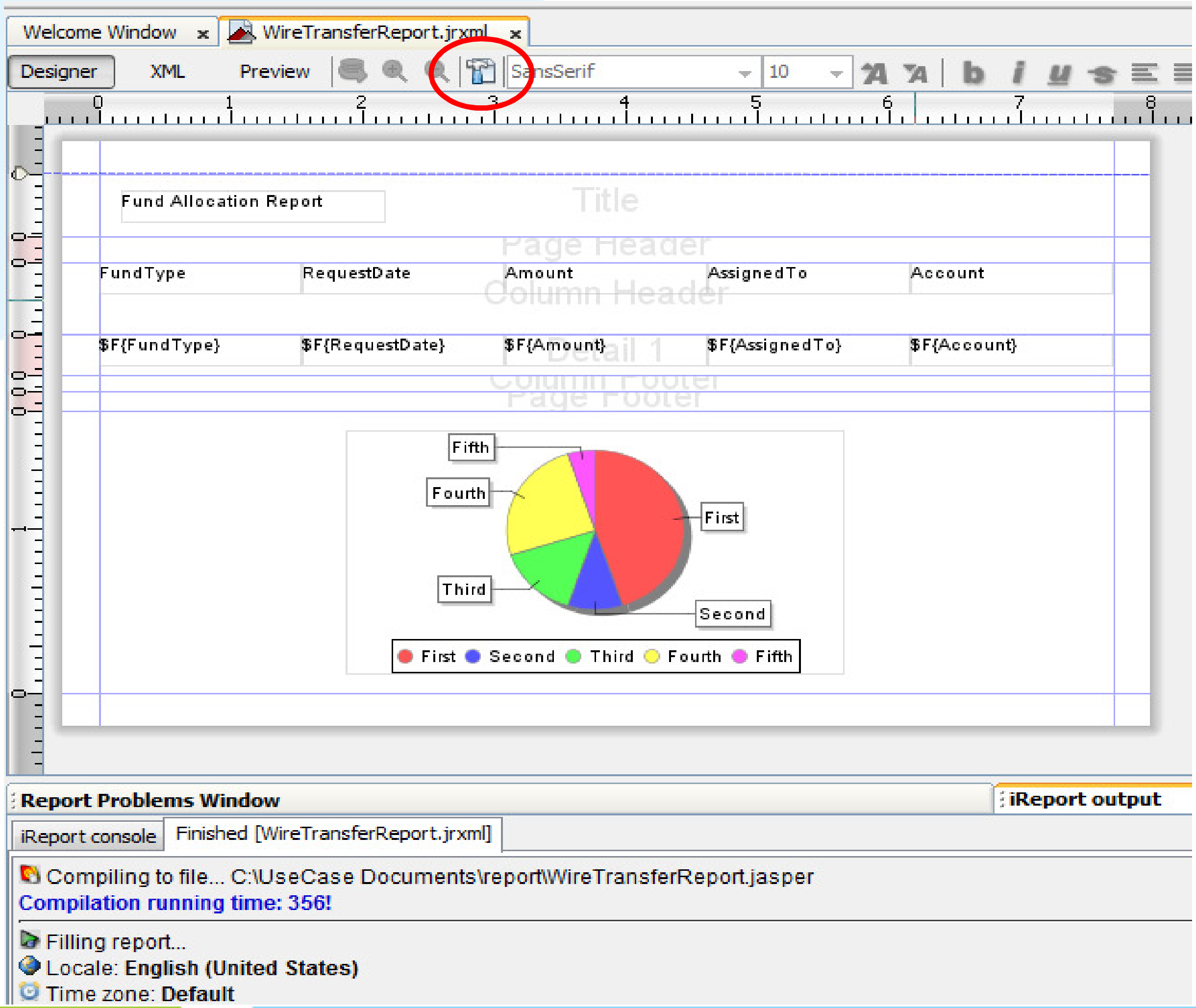
Pie chart is now added to the Summary section. Widen the Summary area by moving the dividers and make the pie chart fit in the section as shown below. If the edges of any component are highlighted with red borders it means that the component is not fitting into the section and this will create errors when compiling the report.



Compile, Preview and Save the Report

Compile the Report

Click on the Compile Report highlighted below and see the result at the bottom.



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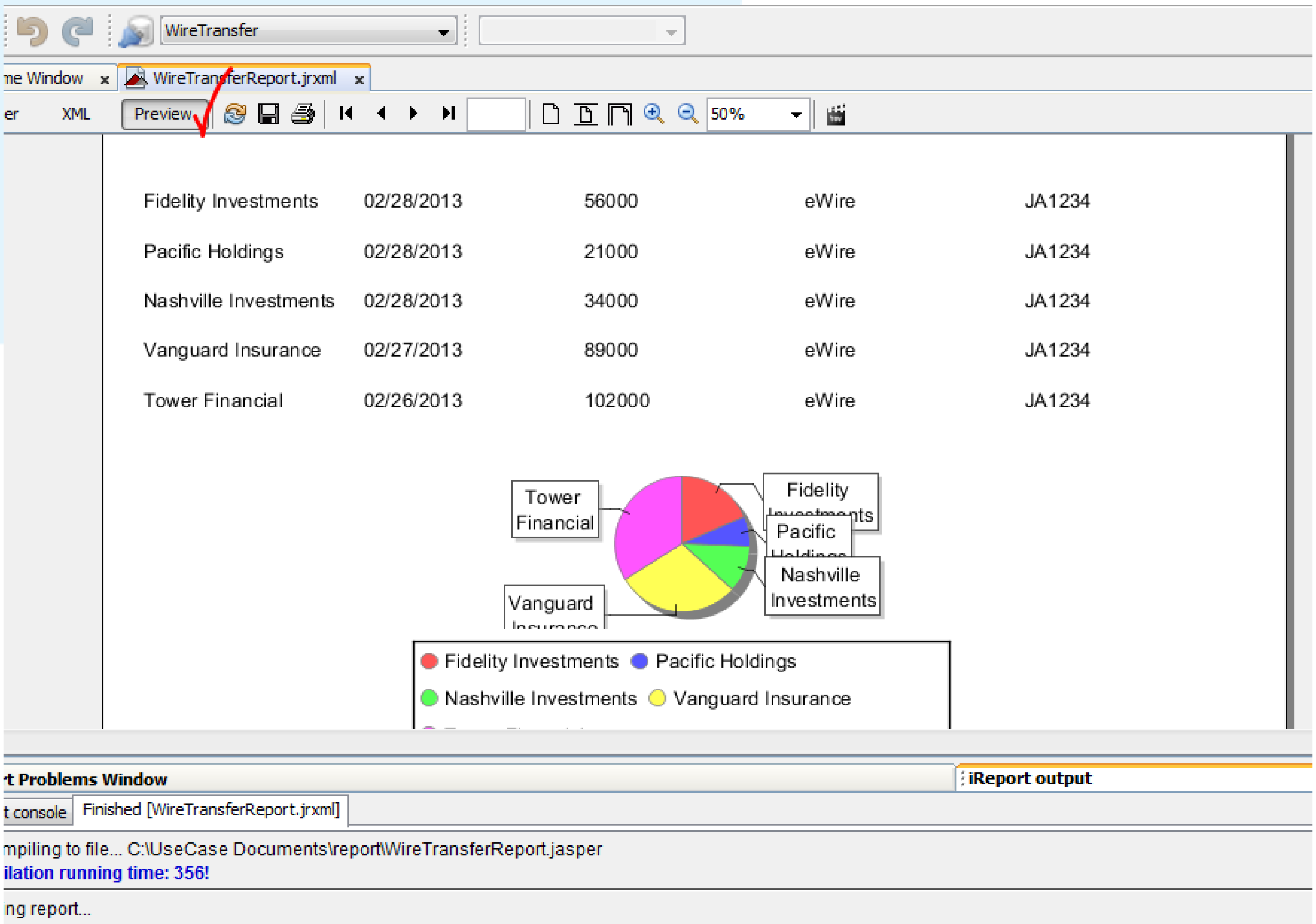
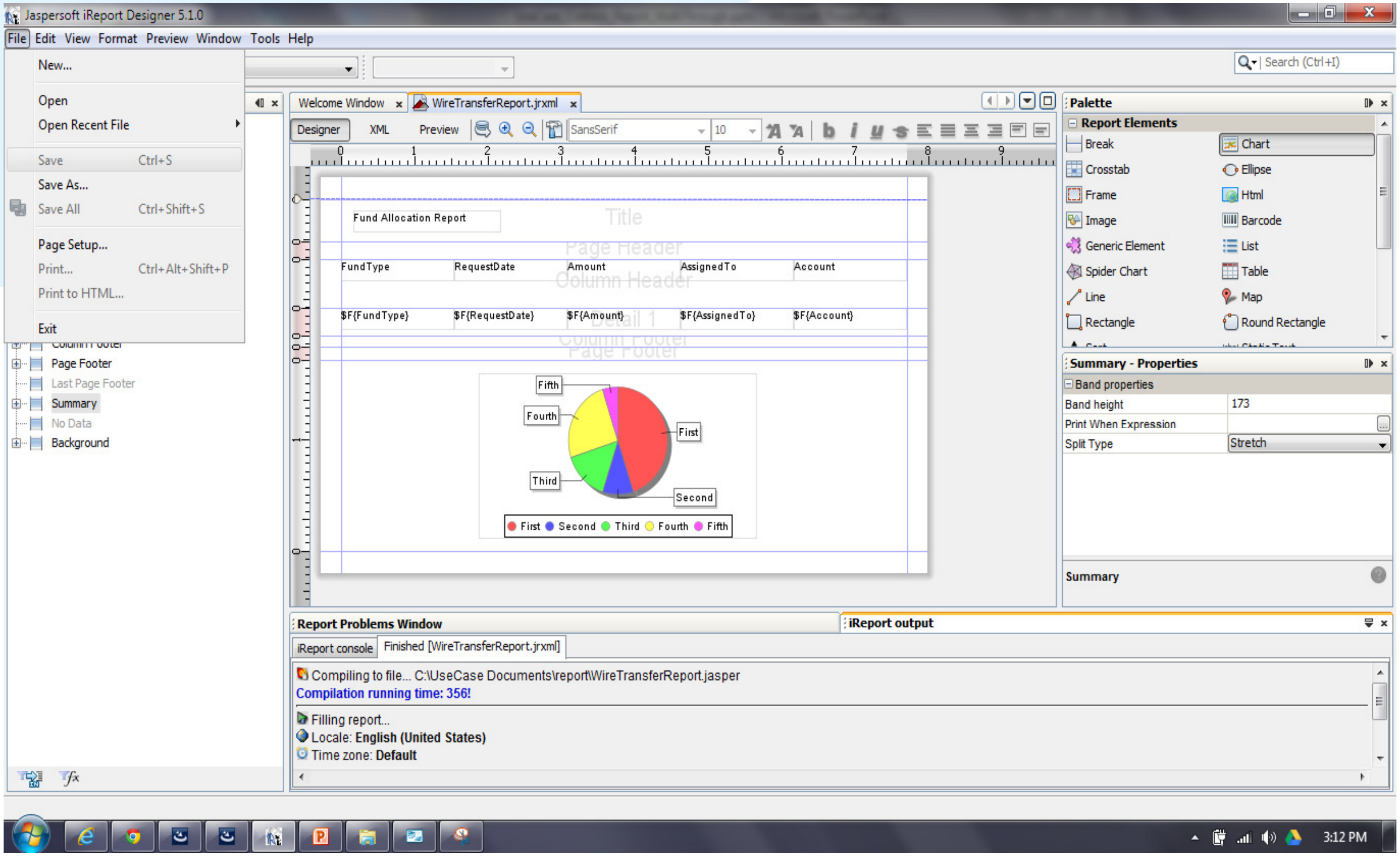
Preview the Report

Click on the Preview button and verify the results.



Save the Report

After previewing the report, click on the Designer button to go back to the designer window. Click on File > Save. The JRXML report type is saved in the location provided in Setup Step 4.



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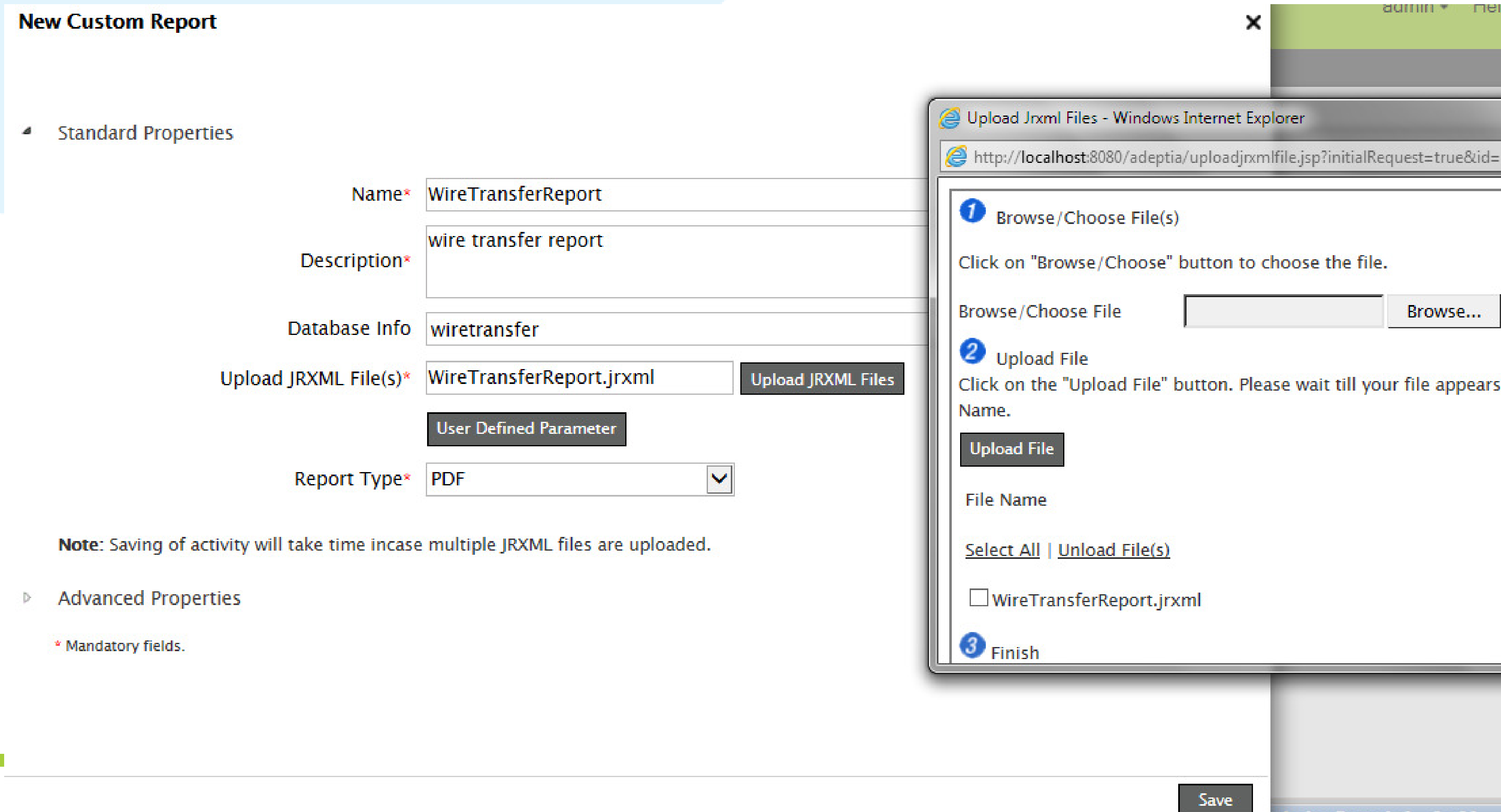
Let's integrate Custom Report in Adeptia (Login to Adeptia)

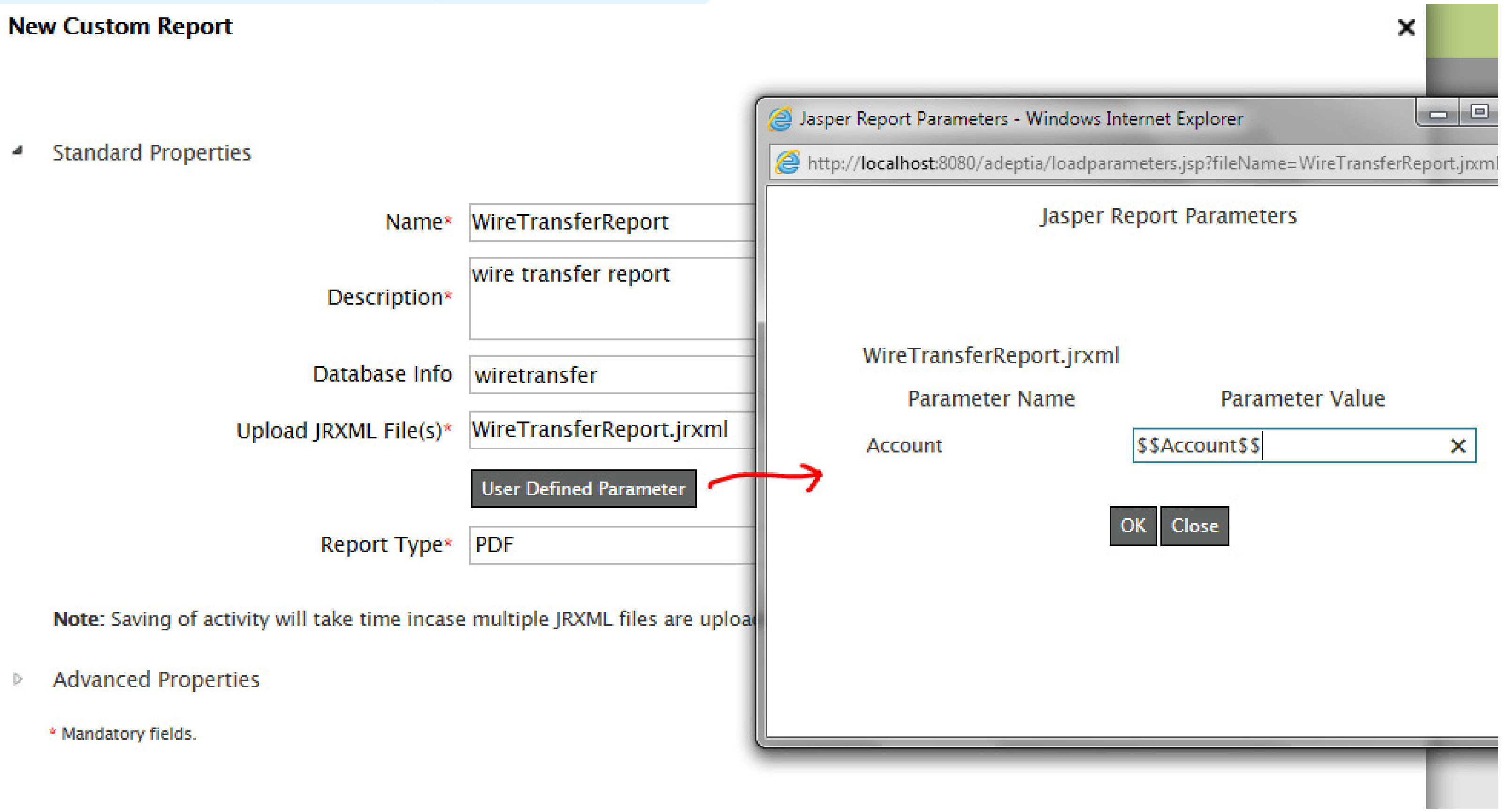
Configure: Custom Report activity

In Adeptia Suite, go to Develop > Reports and Dashboards > Custom Report
and click on Create New. As a prerequisite create a DB Info with same database connection
As defined in the custom report's data source. Select this DB Indo from the list.
Upload the JRXML file saved in the previous step.



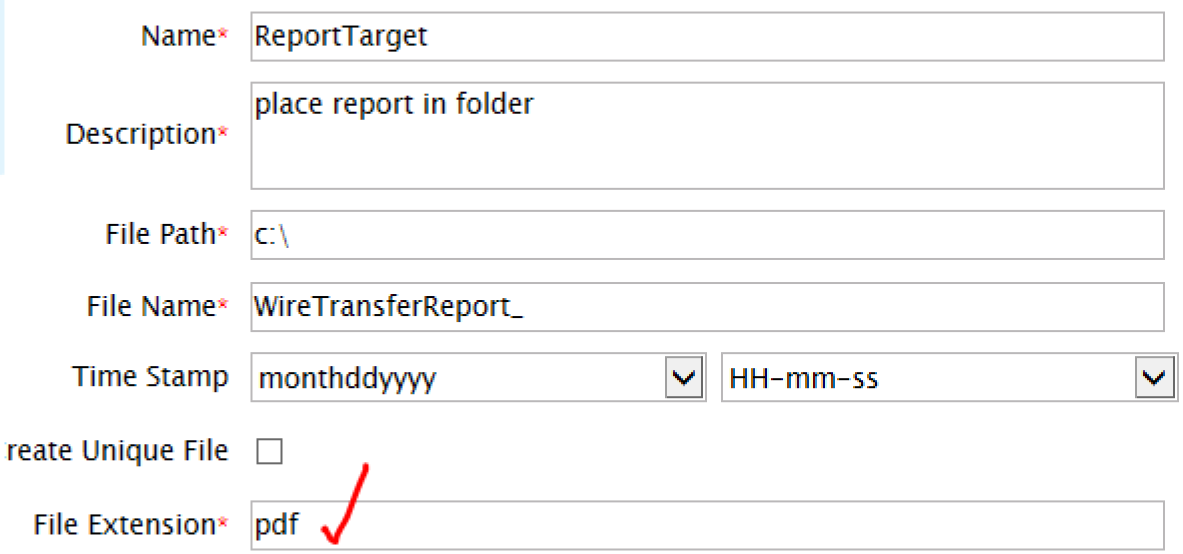
Configure: Custom Report activity (parameter value)

Click on the User Defined Parameter and enter the context variable in the Parameter Value.
If you provide a static value then you can generate the report manually by going to Monitor > Reports > Custom Reports and clicking on the Execute option under the Action. Here $$Account$$ means that the Parameter value will be passed to this activity at run-time in the process flow. Click on Save.



Configure: File Target to store custom reports

Create a Target for your report destination. This can be a File, Email, FTP etc. Example below is a File Target activity.



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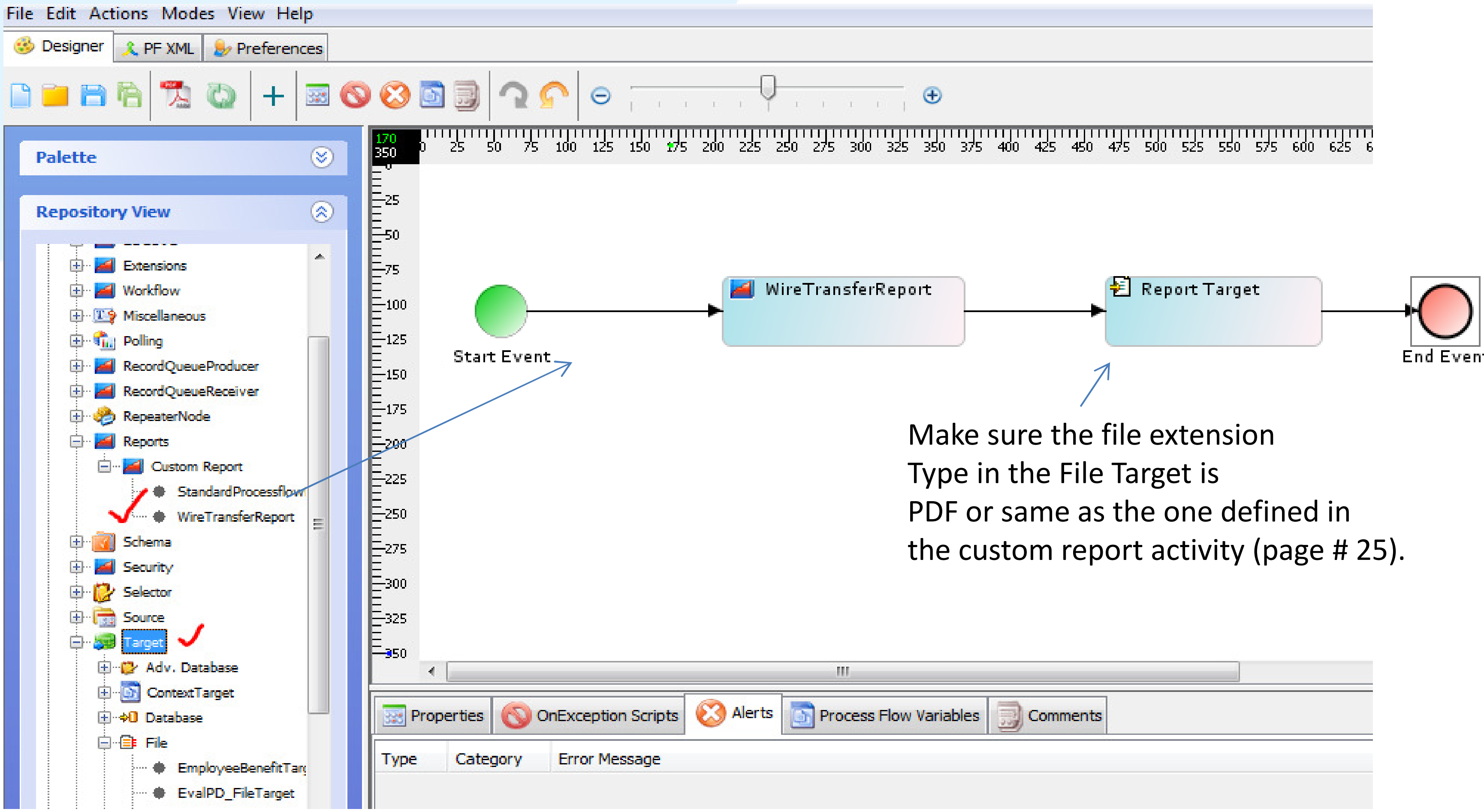
Configure: Process Flow

Let's create a new Process Flow. Go to Develop > Process > Process Flow. Give a name and description. Click on the Process Designer button. Drag the Report and the Target activities and connect them together as shown below. Target here is a file target but you can use email or ftp target or any other transport protocol. Save the process flow.



Make sure the file extension Type in the File Target is PDF or same as the one defined in the custom report activity (page # 25).

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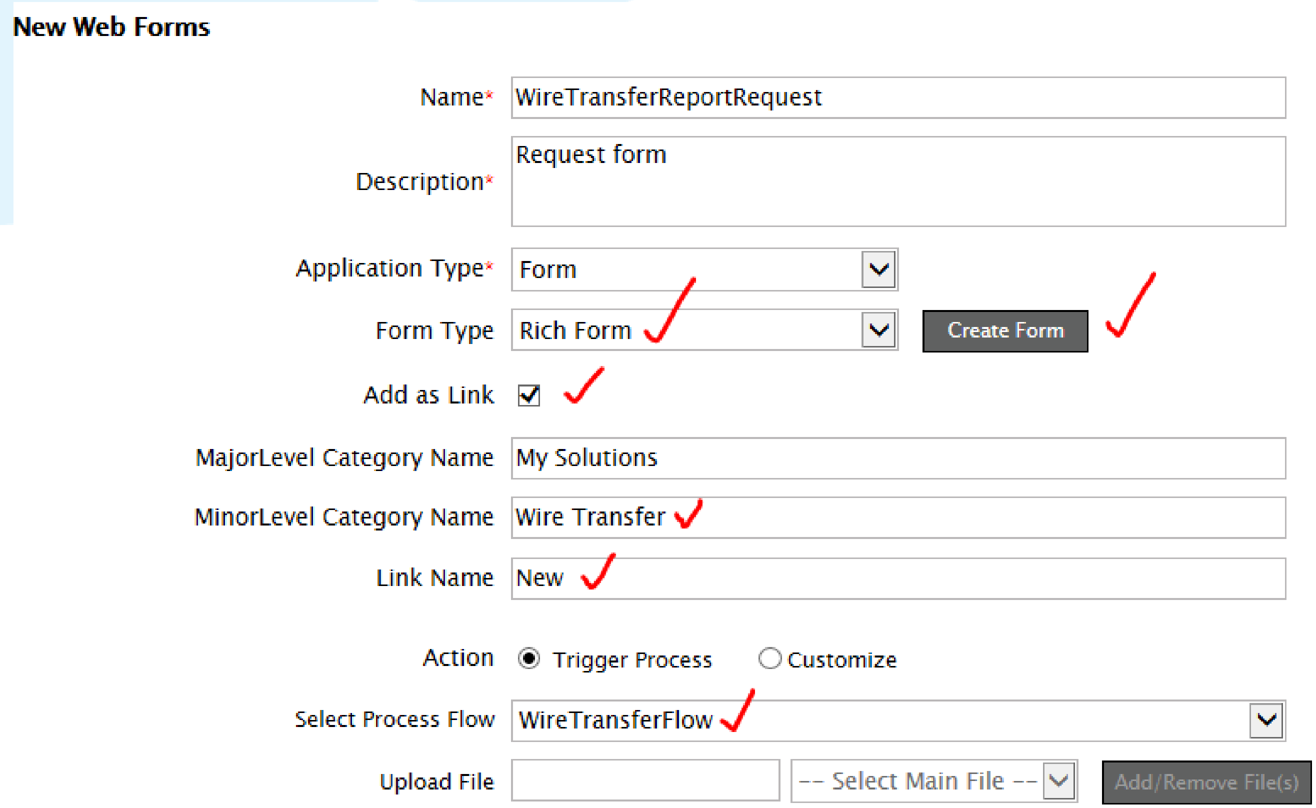
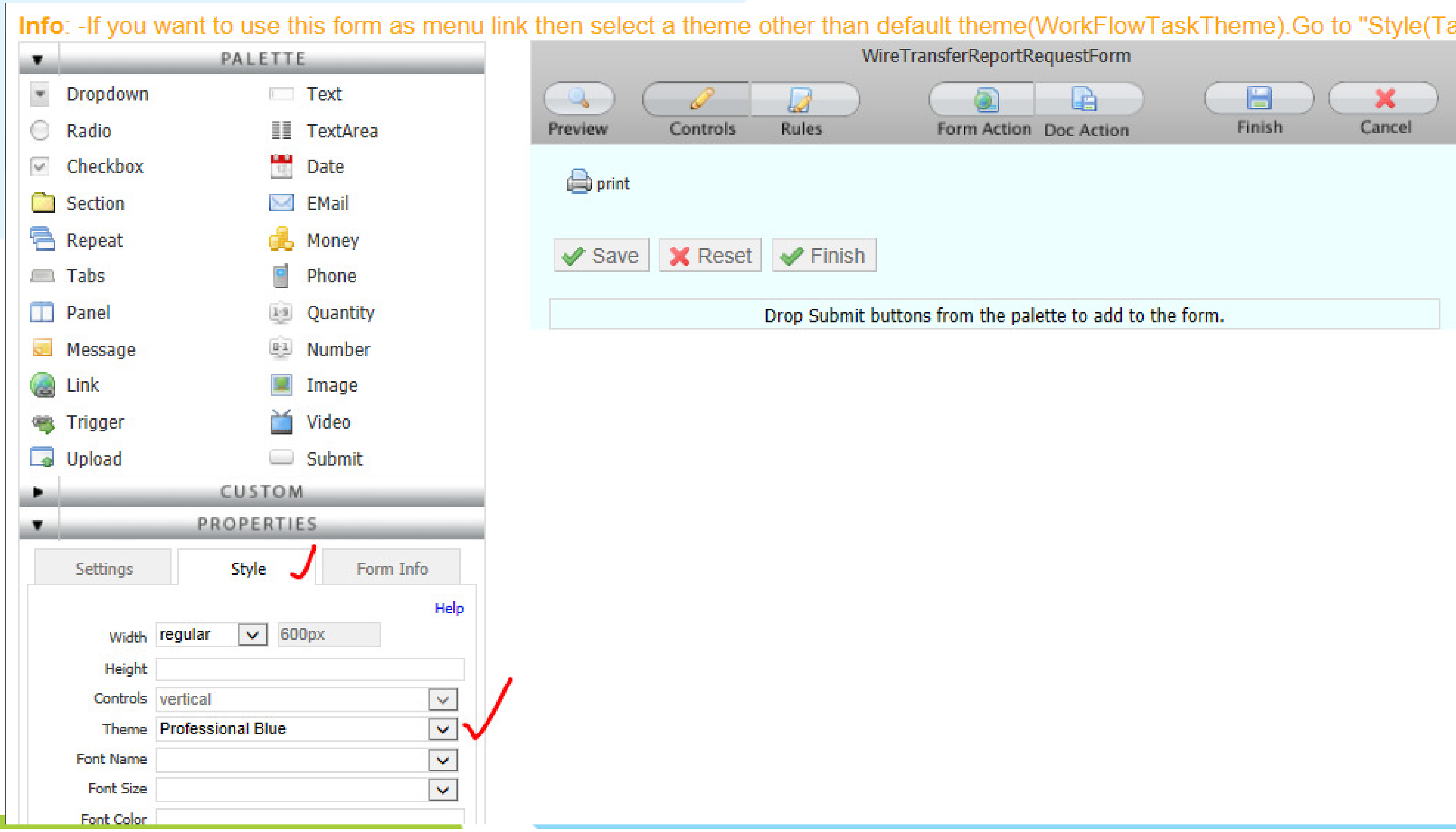
Configure: Web Form that will pass the parameter

In Adeptia Suite, go to Develop > Web Forms and click on Create New.
Select ‘Rich Form’ and click on Create Form. Use Template option if Rich Form option is not granted in your license key. See next slide.



Configure: Web Form that will pass the parameter (contd.)

When the Form designer opens up change the default form theme from Workflow to Clear or Professional Blue in the Style tab as shown below. The purpose of doing this step is that this form would be available under Monitor > My Solutions and not as part of a run-time workflow task.



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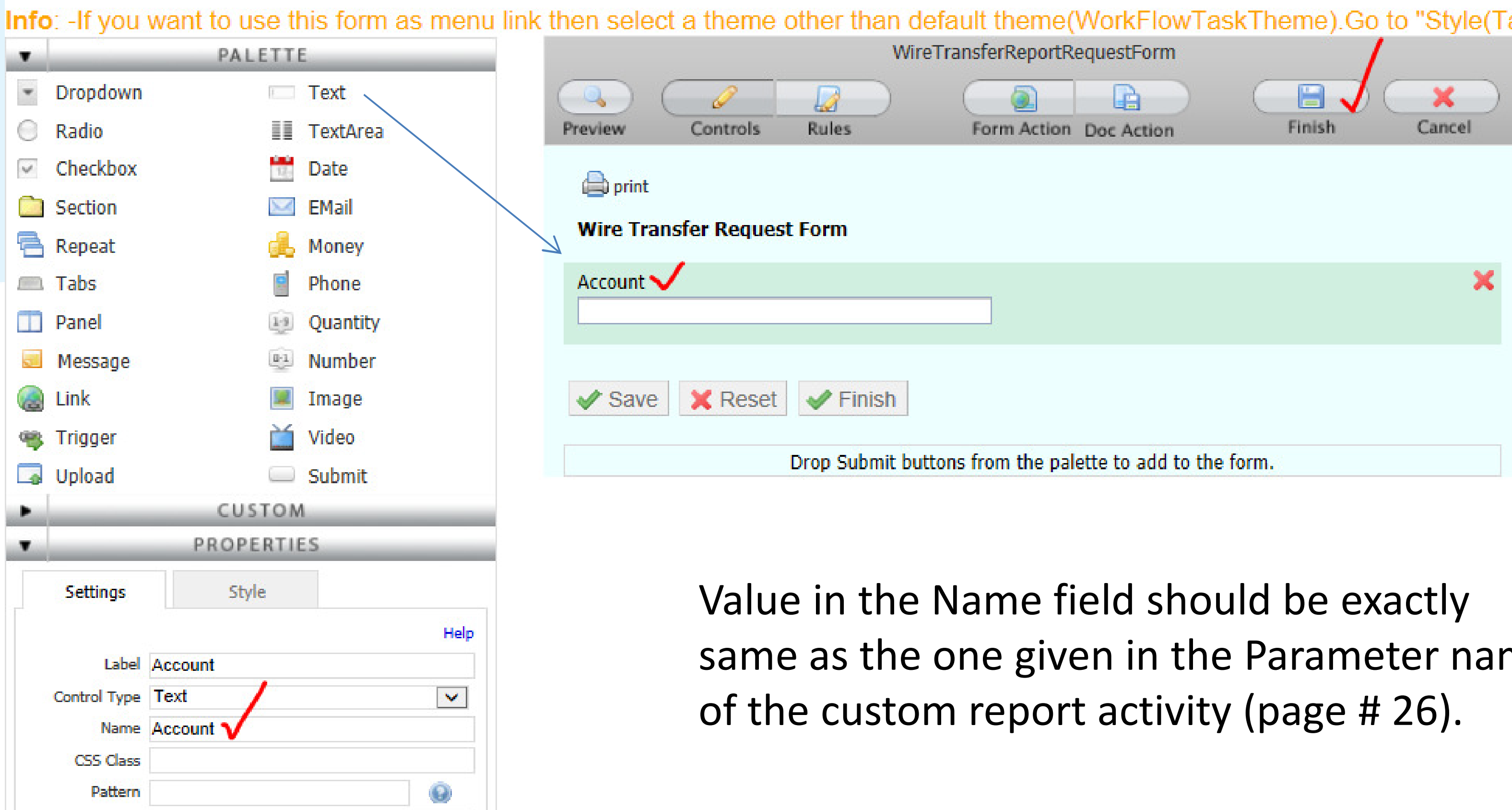
Configure: Web Form that will pass the parameter (contd.)

Click and drag Text from the Palette and put into the Form area. Make sure that the Field Name is same as the parameter name given in the Custom Report activity. Click Finish.



Value in the Name field should be exactly same as the one given in the Parameter name of the custom report activity (page # 26).

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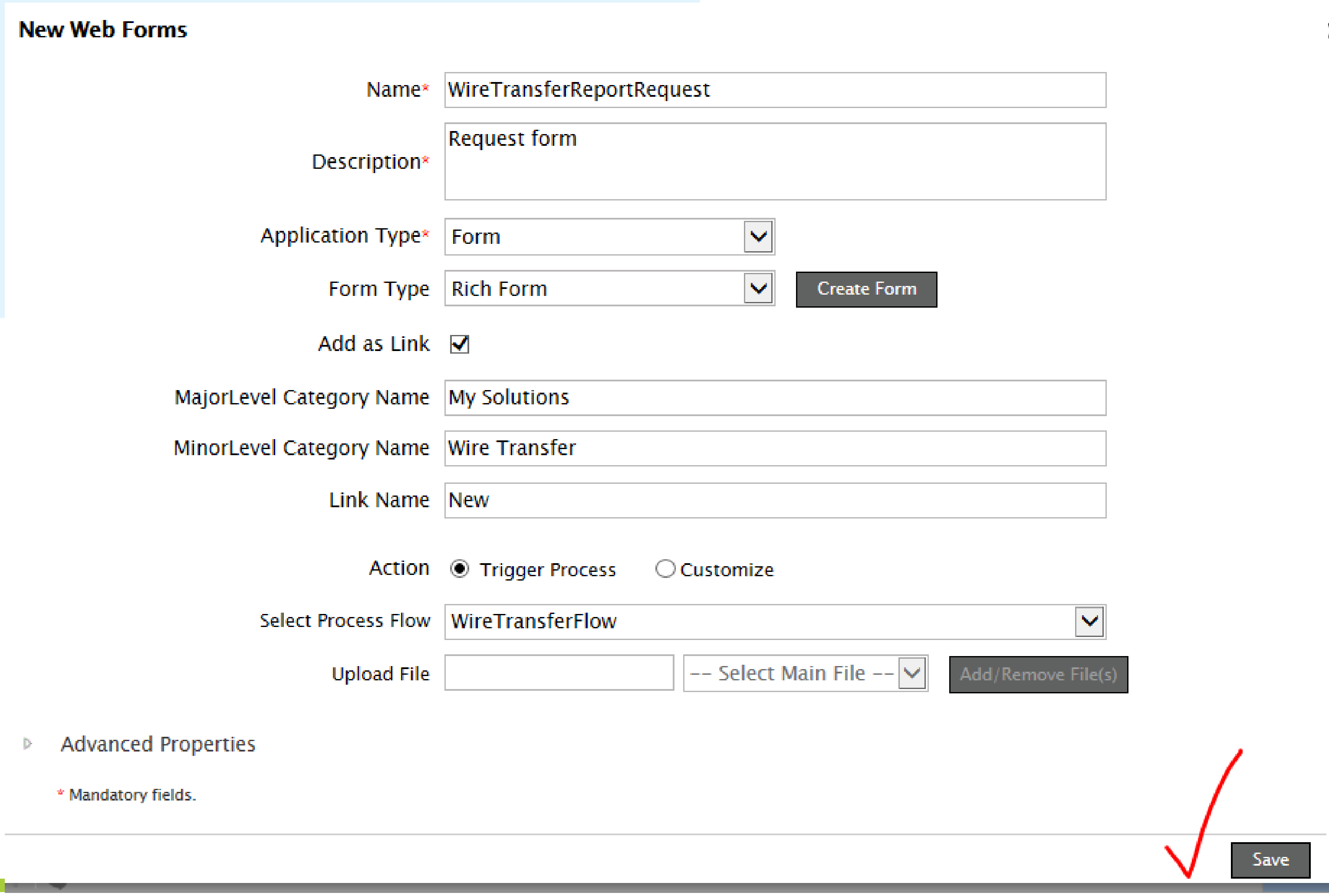
Configure: Web Form that will pass the parameter (contd.)

Click Save on the Web Form activity.



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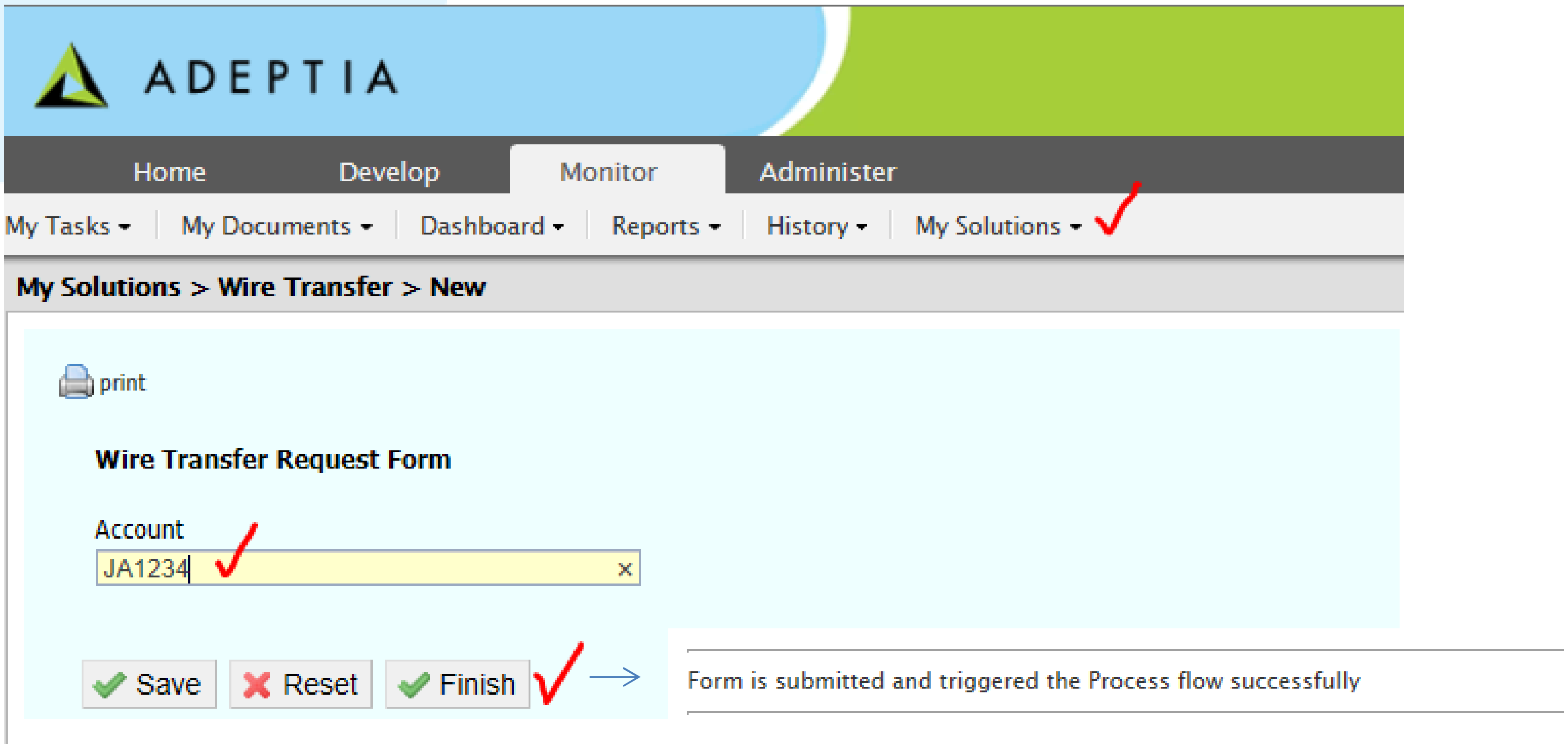
Let’s run the report

Monitor > My Solutions > Wire Transfer report

Enter a parameter value for Account and click on Finish.
Clicking on Finish will trigger the process flow and pass the Account value to the orchestration and the PDF report will be generated in the file target location.



Look at the Report!

WireTransferReport_December072013_16-53-46.pdf 12/7/2013 4:53 PM Adobe Acrobat D...

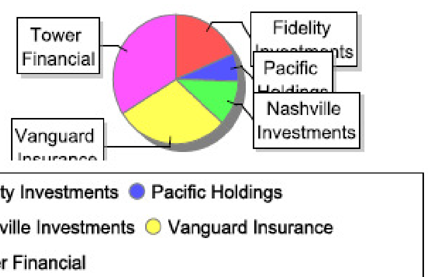
WireTransferReport_December072013_16-53-46.pdf - Adobe Reader

File Edit View Window Help

1 / 1 85% Tools Sign Comment

Fund Allocation Report

FundType	RequestDate	Amount	AssignedTo	Account
Fidelity Investments	02/28/2013	56000	eWire	JA1234
Pacific Holdings	02/28/2013	21000	eWire	JA1234
Nashville Investments	02/28/2013	34000	eWire	JA1234
Vanguard Insurance	02/27/2013	89000	eWire	JA1234
Tower Financial	02/26/2013	102000	eWire	JA1234



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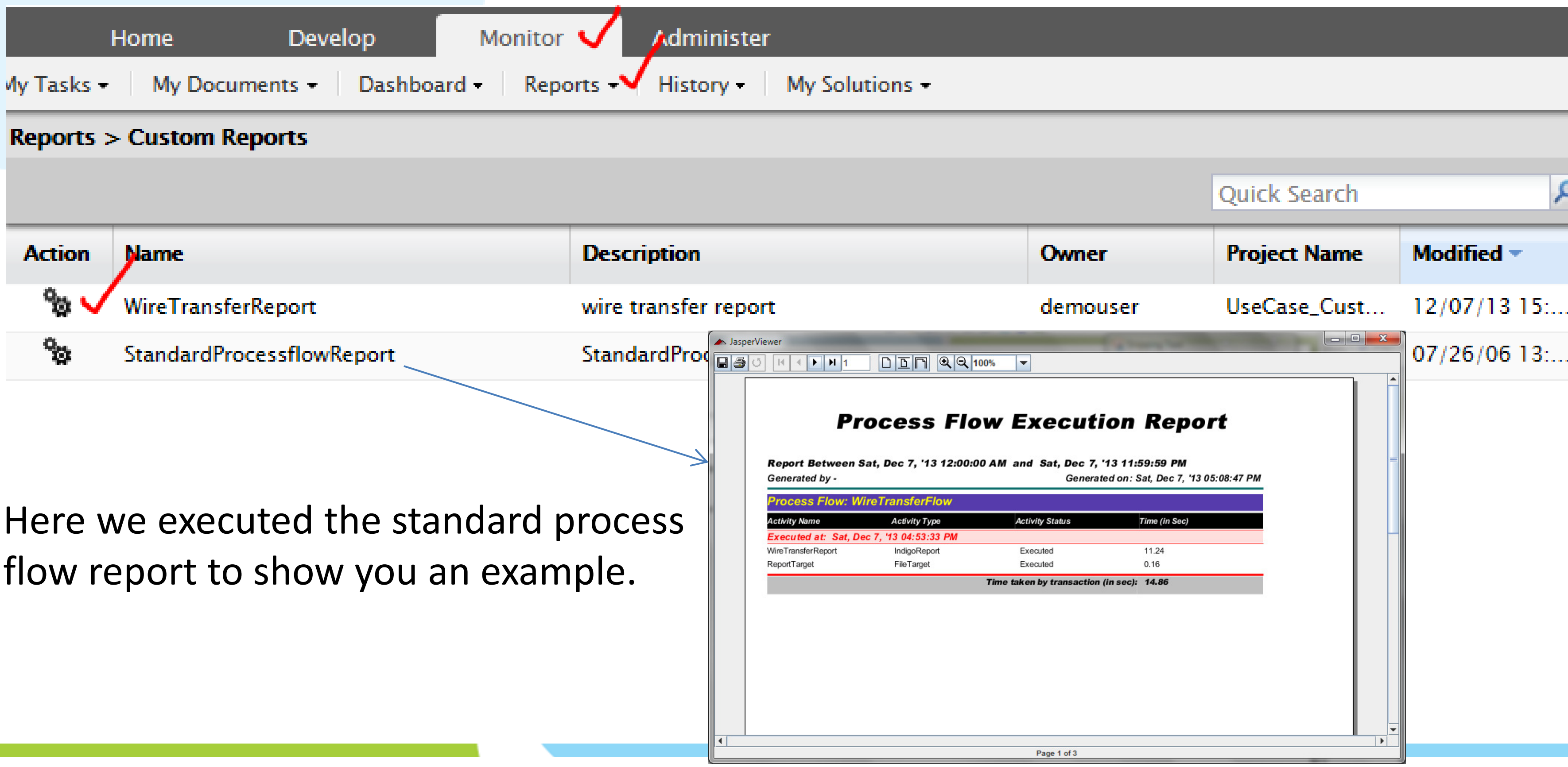
Manually executing a report

If the report is not generated by a run-time parameter or has a constant value in the Custom report activity's Parameter value then you can go directly to Monitor > Reports and click on the Execute icon next to the report name. This will open the report in a viewer.



Here we executed the standard process flow report to show you an example.

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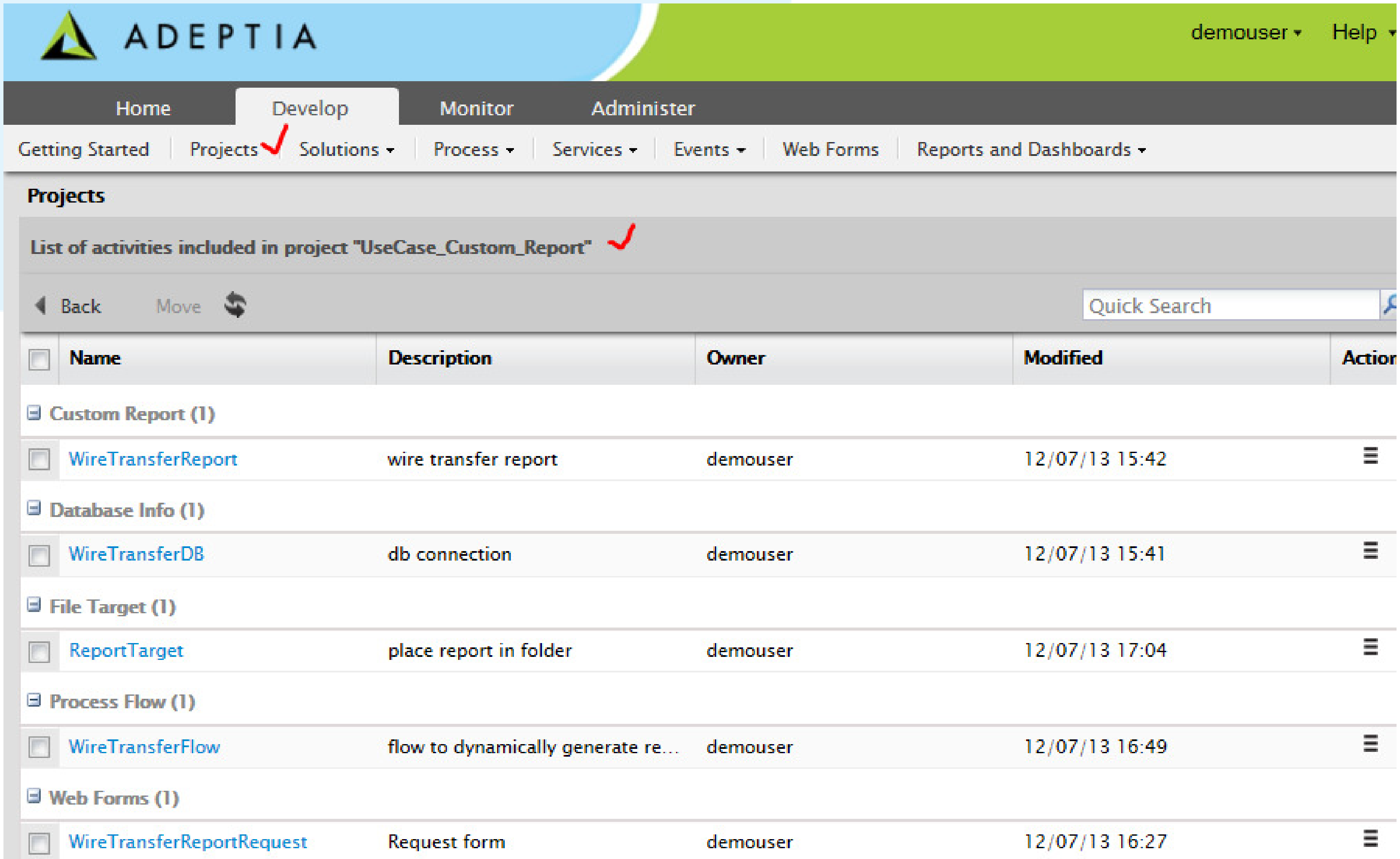
Manage Custom Report project

All the objects created for this use case can be managed by going to Develop > Projects



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Your business problems have changed. Why hasn't your integration solution?

Thank You!

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