



Leading the **Integration** Revolution

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



ADEPTIA

Using Adeptia

Use Case: Trigger a process from a Web Form and create multiple outputs

Use Case highlights

In this use case we will create a process that does the following:

1. Submit a Report Request Web Form to generate Asset Allocation Report
2. Report output can be in PDF, CSV or Excel formats
3. To create the report in PDF we will use iReport utility
4. Send these reports via Email
5. See the run-time results in the process flow logs dashboard

Design methodology

Design

Design a high level process flow

Configure

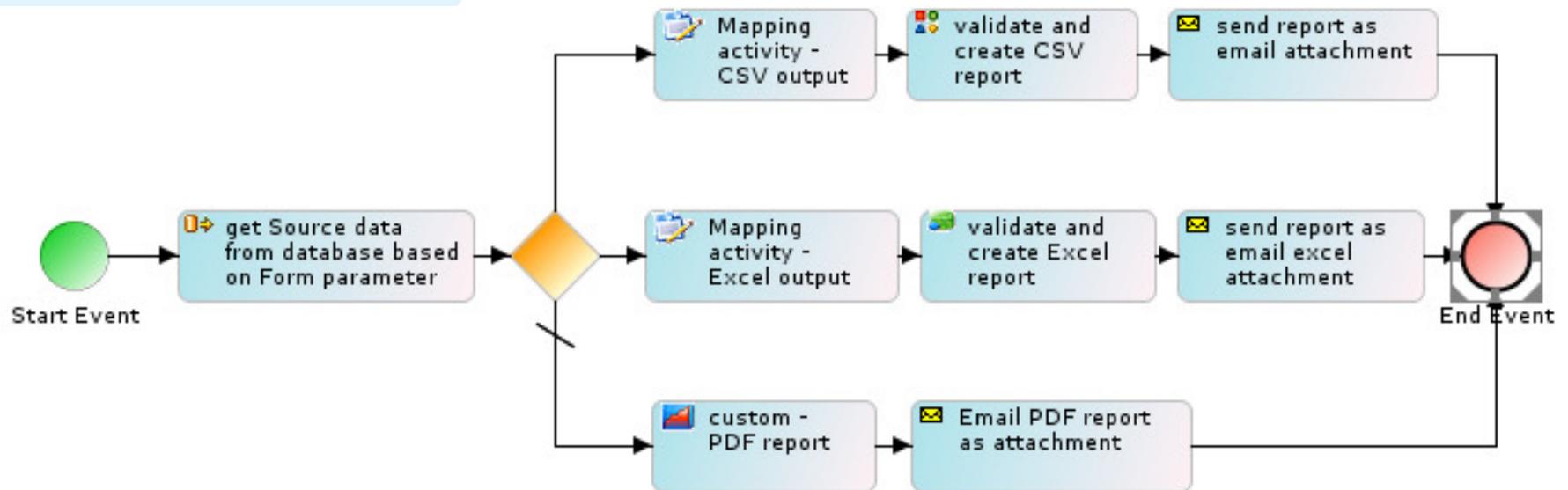
Configure all the activities in the process flow

Deploy

Attach to Event

Design: Process Flow

Please refer to the Use Case video describing how to build this process flow



Configure – Configure Web Form

Create a Web Form and attach it to the process flow. Refer to the video.

The screenshot displays the 'Web Forms' configuration interface. At the top, there is a table listing existing forms:

Name	Description	Owner	Project Name	Modified	Action
AssetAllocationReport	asset allocation report form	demouser	UseCase_FormTri...	12/31/13...	

Below the table, an orange informational message reads: "Info: -If you want to use this form as menu link then select a theme other than default theme(WorkflowTaskTheme).Go to "Style(Ta".

The main interface is divided into several sections:

- Form Creation Wizard:** On the left, a form is being created with the name 'AssetAllocationReport' and description 'asset allocation report form'. The 'Application Type' is set to 'Form' and 'Form Type' is 'Rich Form'. A 'Create Form' button with a red checkmark is visible.
- PALETTE:** A central area containing various form controls such as Dropdown, Radio, Checkbox, Section, Repeat, Tabs, Panel, Message, Link, Trigger, Upload, Text, TextArea, Date, EMail, Money, Phone, Quantity, Number, Image, Video, and Submit.
- PROPERTYIES:** A section for configuring the form's settings, including Name (AssetAllocationReportForm), Description (Edit the form to change this description.), Visibility (Private), Task Info, Tracking Id, and Deployment (Production).
- Form Preview:** On the right, a preview of the 'AssetAllocationReportForm' is shown. It includes a 'print' button, a title 'Asset Allocation Report Request', and three input fields: 'Year', 'FundType', and 'ReportType'. At the bottom of the preview, there are 'Save', 'Reset', and 'Finish' buttons, and a message: 'Drop Submit buttons from the palette to add to the form.'

Configure – Configure Web Form

After saving the Web Form, right click and select Publish.
Form will appear under Monitor > My Solutions

Web Forms						
Delete	Create New					Quick Search
<input type="checkbox"/>	Name	Description	Owner	Project Name	Modified	Action
<input checked="" type="checkbox"/>	AssetAllocationReport	asset allocation report form	demouser	UseCase_FormTri...	12/31/13...	

Name*

Description*

Application Type*

Form Type

Add as Link

MajorLevel Category Name

MinorLevel Category Name

Link Name

Action Trigger Process Customize

Select Process Flow

Upload File

Configure – Adv. Database Schema

As a prerequisite create Database Info activity. Refer to video.

Services > Schema > Adv. Database

Delete Refresh Create New

Name
UseCase_AssetAllocationSchema

Name: UseCase_AssetAllocationSchema
Description: db schema
Database Info: AssetAllocationConnection
Definition Mode: Import XSD File Use Database Table
XSD File: Browse...

Add Root Table

Query: SELECT accountname, fundtype, b
Browse Tables PKs: Remove Add Child Table

Select Table

- dbo.assetallocation**
- dbo.dbeventtriggertable

Select Columns

- Select All
- accountname(varchar)
- fundtype(varchar)
- balance(decimal)
- accountid(varchar)
- fundname(varchar)
- year(varchar)
- allocation(int)

Query

```
SELECT
accountname, fundtype, balance, accountid, fundname, year, allo
on FROM "dbo"."assetallocation"
```

Clear Query

Primary Keys

Clear Primary Keys

Get Columns Generate Query Add Primary Key

Configure – Adv. Database Source

As a prerequisite create Database Info and Adv. Database Schema activity. Refer to video.

Services > Source > Adv. Database ✓

Delete + Create New Quick Search

Name	Description	Owner	Project Name	Modified	Action
UseCase_AssetAllocation_Source	db source	demouser	UseCase_FormTri...	12/31/13...	☰

Name* UseCase_AssetAllocation_Source

Description* db source

Database Info* AssetAllocationConnection

Schema Name* UseCase_AssetAllocationSchema

Edit Queries ✓

Edit Queries button is enabled after you go back and edit the saved activity. In the edit query window you can provide the parameter names in the Where clause of the sql query. Enclose in \$\$ and single quotes if parameters are type text.

Table Name	SQL Query	Where Clause
DB/assetallocation/	SELECT accountname,fundtype,balance,accountid,fundname,year,allocation FROM "dbo"."assetallocation"	WHERE fundtype = '\$\$FundType\$\$' and Year = '\$\$Year\$\$'

Configure – Excel & CSV Schema

Create Excel schema by using the template file attached in the forum page.

Services > Schema > Excel ✓

Delete + Create New Quick Search

<input type="checkbox"/>	Name	Description	Owner	Project Name	Modified	Action
<input type="checkbox"/>	UseCase_Excel_AssetAllocation	excel schema	demouser	UseCase_FormTri...	12/31/13...	☰

Create CSV schema by using the template file attached in the forum page.

Services > Schema > Text ✓

Delete + Create New Quick Search

<input type="checkbox"/>	Name	Description	Owner	Project Name	Modified	Action
<input type="checkbox"/>	UseCase_CSV_AssetAllocation	csv schema	demouser	UseCase_FormTri...	12/31/13...	☰

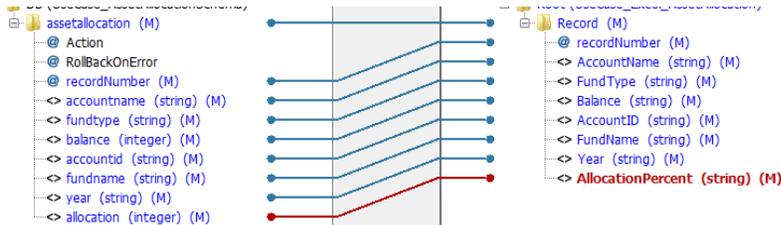
Configure – Mapping

Configure two mapping activities for Excel and CSV output. Refer to the video.

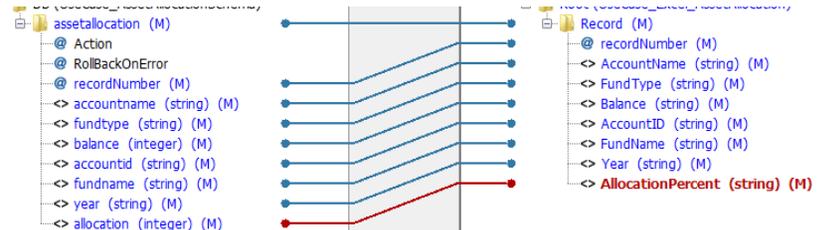
Services > Data Transformation > Data Mapping ✓

Name	Description	Owner	Project Name	Modified	Action
UseCase_AssetAllocation_Excel_Map	excel mapping	demouser	UseCase_FormTri...	12/31/13...	⋮
UseCase_AssetAllocation_CSV_Map	CSV Mapping	demouser	UseCase_FormTri...	12/31/13...	⋮

CSV Map



Excel Map



Configure – 3 Email targets

You can edit the process flow and use any other target type. In this use case we are using Email targets. Refer to the video on how to configure these activities.

Services > Target > Mail ✓

Delete + Create New Quick Search

<input type="checkbox"/>	Name	Description	Owner	Project Name	Modified	Action
<input type="checkbox"/>	UseCase_PDF_Email	Email that sends out PDF file	demouser	UseCase_FormTri...	12/31/13...	☰
<input type="checkbox"/>	UseCase_Excel_Email	Email that sends out CSV file	demouser	UseCase_FormTri...	12/31/13...	☰
<input type="checkbox"/>	UseCase_CSV_Email	Email that sends out CSV file	demouser	UseCase_FormTri...	12/31/13...	☰

Configure – PDF Report template

We are using iReport to create the PDF report template. Refer to the video. Also refer to the “Create Custom Report” use case in the forum for a hands-on example.

The screenshot displays the iReport software interface. The main workspace shows a report design for "Asset Allocation Report". The report includes a title, a page header, a table with columns for accountname, fundtype, balance, accountid, fundname, year, and allocation, and a pie chart with five segments labeled First, Second, Third, Fourth, and Fifth. The interface also shows a Report Inspector on the left, a Palette on the right, and a Report Problems Window at the bottom.

Report Inspector

- AssetAllocation
- Styles
- Parameters
- Fields
- Variables
- Scriptlets
- Title
- Page Header
- Column Header
- Detail 1
- Column Footer
- Page Footer
- Last Page Footer
- Summary
- No Data
- Background

Table

accountname	fundtype	balance	accountid	fundname	year	allocation
$\$F\{accountname\}$	$\$F\{fundtype\}$	$\$F\{balance\}$	$\$F\{accountid\}$	$\$F\{fundname\}$	$\$F\{year\}$	$\$F\{allocation\}$

Pie Chart

- First
- Second
- Third
- Fourth
- Fifth

Report Problems Window

iReport console Finished [AssetAllocation.jrxml]

Compiling to file... C:\Program Files\AdeptiaSuite61Dec\AdeptiaSuite-6.1\AdeptiaServer\ServerKernel\web\libs\driver\AssetAllocation.jasper
Compilation running time: 540!

Configure – Gateway Rules in Process flow

The screenshot displays a process flow designer interface. On the left, a 'Repository View' lists various mapping activities, with 'UseCase_AssetAllocation_CSV_Map' selected. The main canvas shows a process flow starting with a 'Start Event' (green circle), followed by an activity 'get Source data from database based on Form parameter'. A gateway rule is positioned after this activity, and its configuration is shown in the 'Rule Information' dialog box. The dialog box contains the following fields and options:

- Rule Name: RuleType
- Rule Reason: report type
- Existing Activities: [Dropdown]
- Activity Attribute/Variable: Type ✓
- Operand Type: Text
- Operator: Equal
- Value: Excel ✓
- Buttons: Create Expression (highlighted with a red checkmark), Insert Operator
- Expression field: (\$\$Type\$\$ equals (\"Excel\"))

Configure – Multiple Stream in Process flow

The screenshot shows the Designer interface with a process flow diagram and a repository view. The process flow diagram features a 'Start Event' (green circle) connected to an activity box labeled 'get Source data from database based on Form parameter'. An arrow points from the 'get Source data...' activity to the 'Multiple Stream Dialog' window. The repository view on the left lists various mapping activities, with 'UseCase_AssetAllocation_CSV_Map' highlighted in blue. The interface includes a toolbar with icons for file operations, a ruler at the top, and a 'Properties' panel at the bottom.

The 'Multiple Stream Dialog' window is open, showing the configuration for a stream. The 'Stream Name Entry' section has a text box for 'Stream name' and an 'Add Stream' button. The 'Stream And Activity Mapping' section has dropdown menus for 'Streams' (set to 'UseCase_Asset...') and 'Activities' (set to 'UseCase_Asset...'), along with a 'Map' button. The 'Stream Information Table' section contains a table with the following data:

Stream Name	Error Stream	Stream Consumer Activity	E...
UseCase_AssetAlloc...	<input type="checkbox"/>	UseCase_AssetAllocation_CSV_...	<input type="checkbox"/>
		UseCase_AssetAllocation_CSV_Map	
		UseCase_Excel_Map	

The 'Done' and 'Cancel' buttons are located at the bottom right of the dialog.

Deploy – Submit Web Form & trigger process

Submitting a Web Form automatically trigger the attached process flow.

The screenshot displays a web application interface with a navigation menu at the top. The menu includes 'Home', 'Develop', 'Monitor', and 'Administer'. Below the menu, there are several dropdown menus: 'My Tasks', 'My Documents', 'Dashboard', 'Reports', 'History', and 'My Solutions'. A red checkmark is placed next to the 'My Solutions' dropdown. The main content area shows a breadcrumb trail: 'My Solutions > Asset Allocation Report > Request'. Below the breadcrumb, there is a 'print' icon and the text 'Asset Allocation Report Request'. The form contains three input fields: 'Year' with the value '2013', 'FundType' with the value 'Low Risk Growth Fund', and 'ReportType' with the value 'PDF'. At the bottom of the form, there are three buttons: 'Save' (with a green checkmark icon), 'Reset' (with a red X icon), and 'Finish' (with a green checkmark icon). A red checkmark is also placed next to the 'Finish' button.

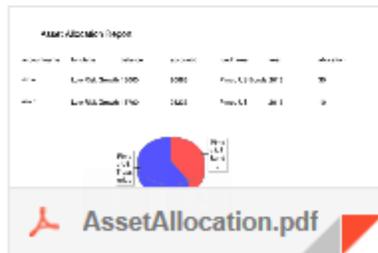
Results – Here is a sample email with attachment

Asset Allocation Report - PDF

Inbox x

evalbpm@adeptia.com
to me

3:37 PM (1 hour ago)



AssetAllocation.pdf - Adobe Reader

File Edit View Window Help

1 / 1 75% Tools Sign Comment

Asset Allocation Report

accountname	fundtype	balance	accountid	fundname	year	allocation
Jim W	Low Risk Growth	13000	90883	Pimco US Bonds 2013		30
Alex E	Low Risk Growth	18700	93233	Pimco US	2013	10

A pie chart showing the asset allocation. The chart is divided into two segments: a larger blue segment representing Pimco US Treasuries and a smaller red segment representing Pimco US Bonds. A legend below the chart identifies the colors: a red dot for Pimco US Bonds and a blue dot for Pimco US Treasuries.

Project: View and manage activities for this use case

Projects

List of activities included in project "UseCase_FormTrigger" ✓

◀ Back Move ↻ Quick Search

<input type="checkbox"/>	Name	Description	Owner	Modified	Action
<input type="checkbox"/>	Advance Database Schema (1)				
<input type="checkbox"/>	Advanced Database Source (1)				
<input type="checkbox"/>	Custom Report (1)				
<input type="checkbox"/>	UseCase_PDF_AllocationReport	PDF Report	demouser	12/31/13 15:25	☰
<input type="checkbox"/>	Data Mapping (2)				
<input type="checkbox"/>	UseCase_AssetAllocation_CSV_...	CSV Mapping	demouser	12/31/13 14:54	☰
<input type="checkbox"/>	UseCase_AssetAllocation_Excel...	excel mapping	demouser	12/31/13 16:55	☰
<input type="checkbox"/>	Database Info (1)				
<input type="checkbox"/>	Excel Schema (1)				
<input type="checkbox"/>	Mail Target (3)				
<input type="checkbox"/>	Process Flow (1)				
<input type="checkbox"/>	UseCase_FormTrigger_Reports	generate reports as a result of...	demouser	12/31/13 16:26	☰

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Thank You!



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