Leading the **Integration** Revolution

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

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

ADEPTIA

Design methodology

Design → Configure → Deploy

Design a high level process flow

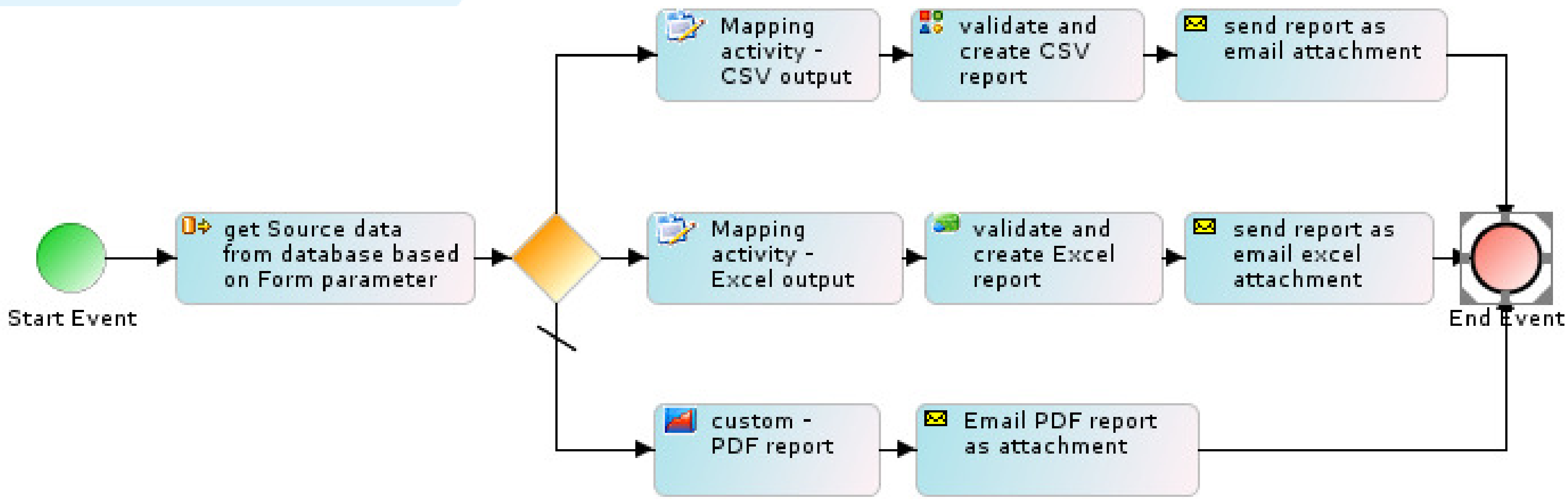
Configure all the activities in the process flow

Attach to Event

ADEPTIA

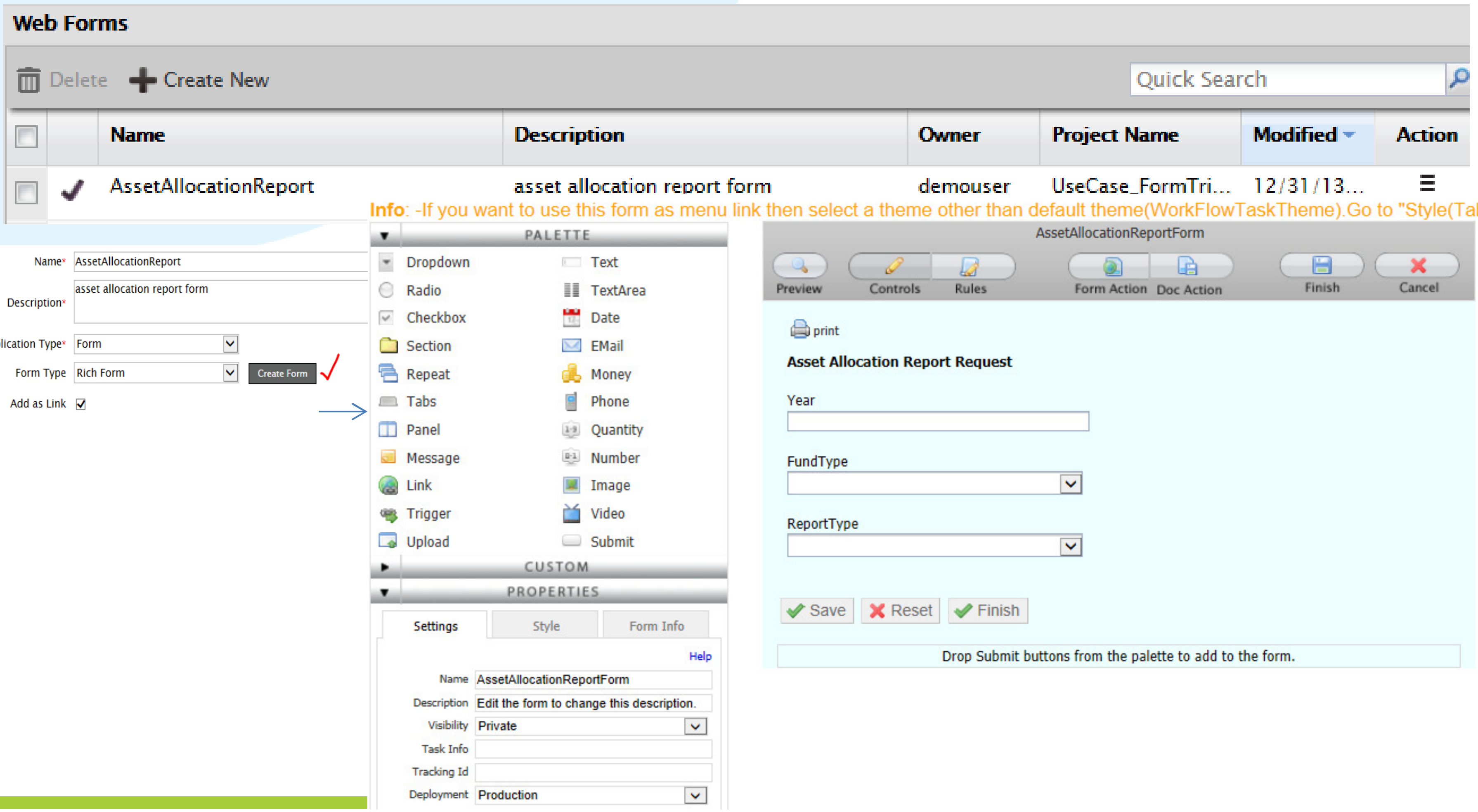
Design: Process Flow

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



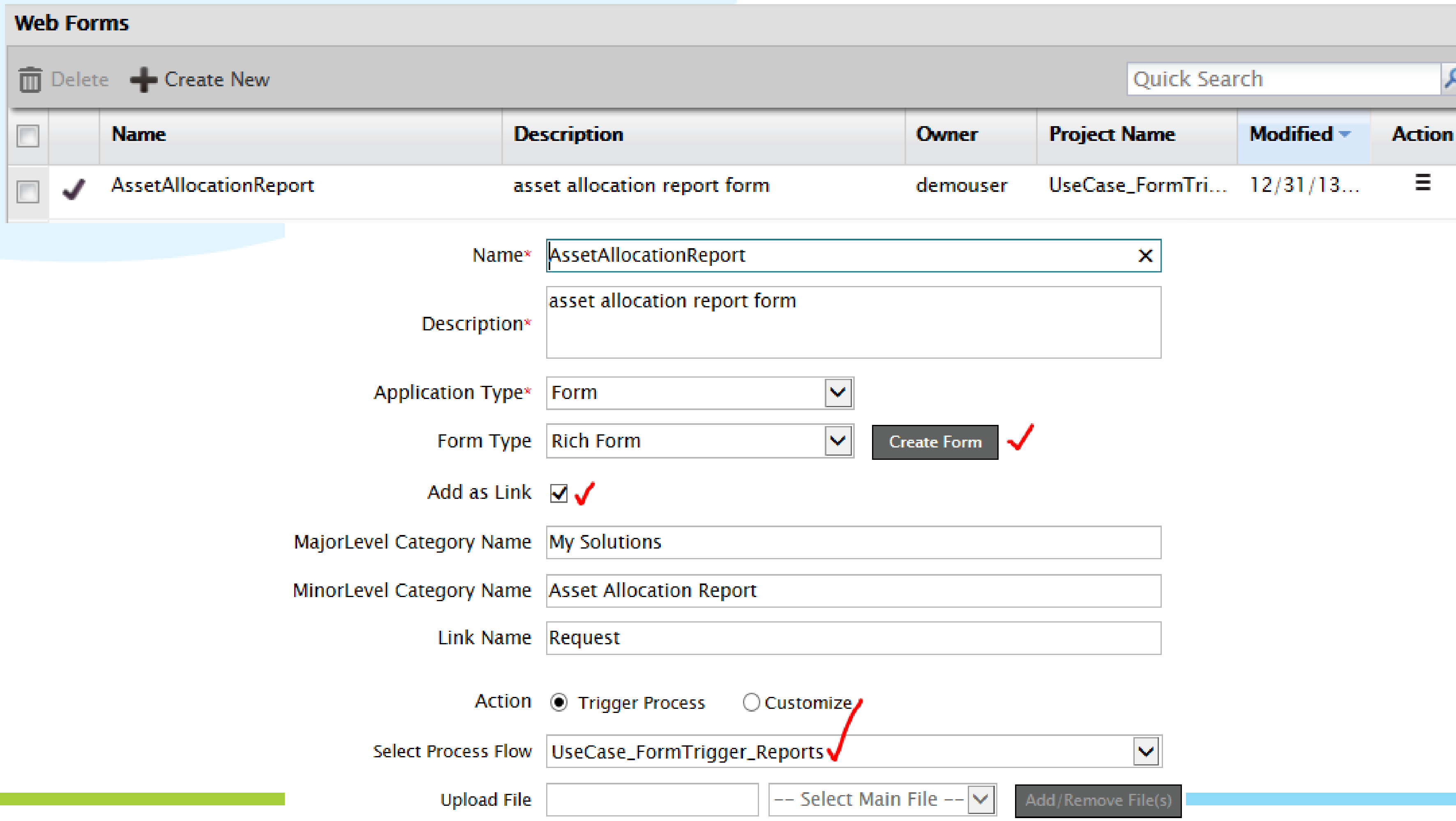
Configure – Configure Web Form

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



Configure – Configure Web Form

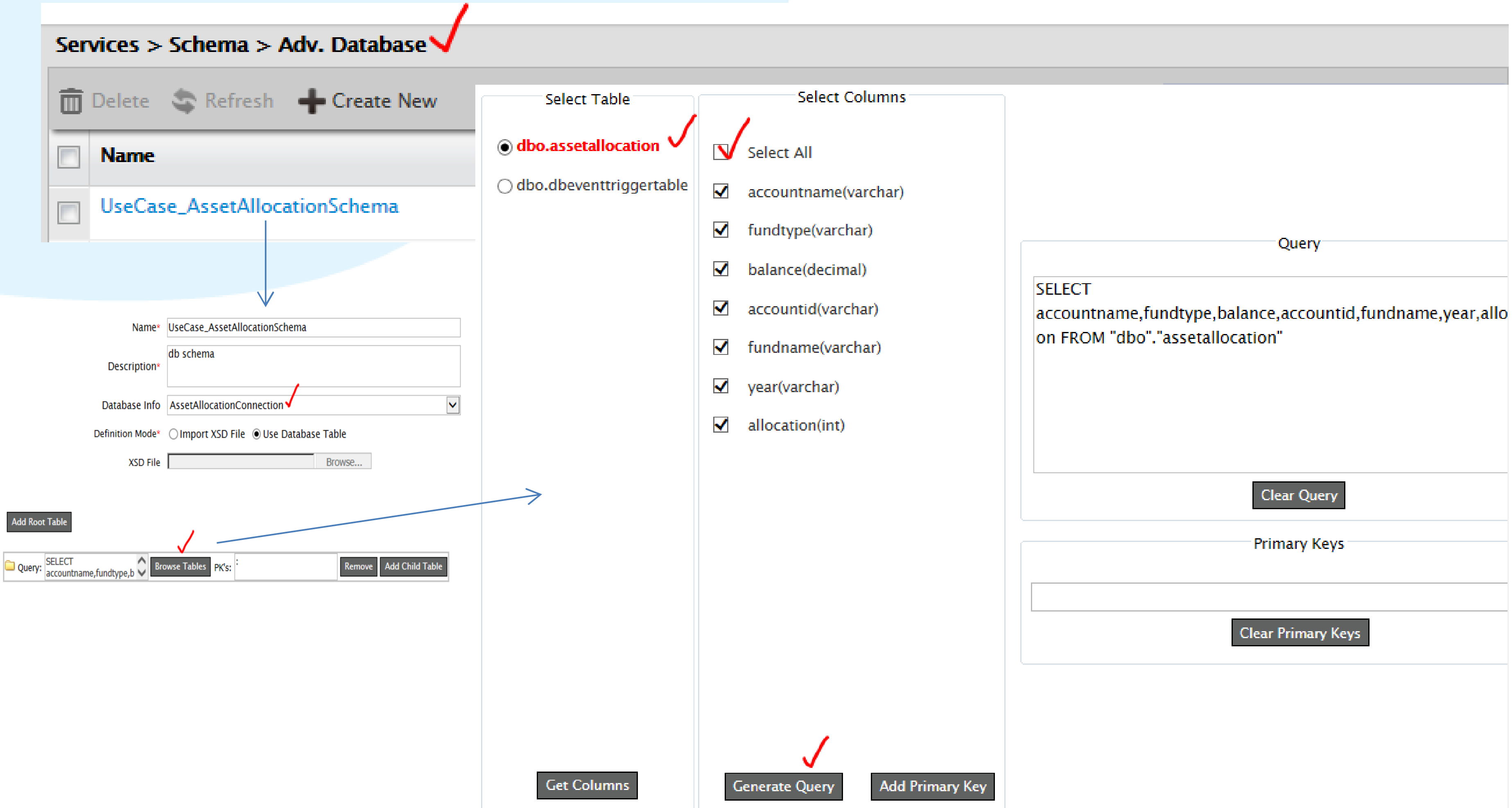
After saving the Web Form, right click and select Publish.
Form will appear under Monitor > My Solutions



ADEPTIA

Configure – Adv. Database Schema

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



ADEPTIA

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 = '$$Year$$'

ADEPTIA

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

	Name	Description	Owner	Project Name	Modified	Action
	UseCase_Excel_AssetAllocation	excel schema	demouser	UseCase_FormTri...	12/31/13...	☰

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

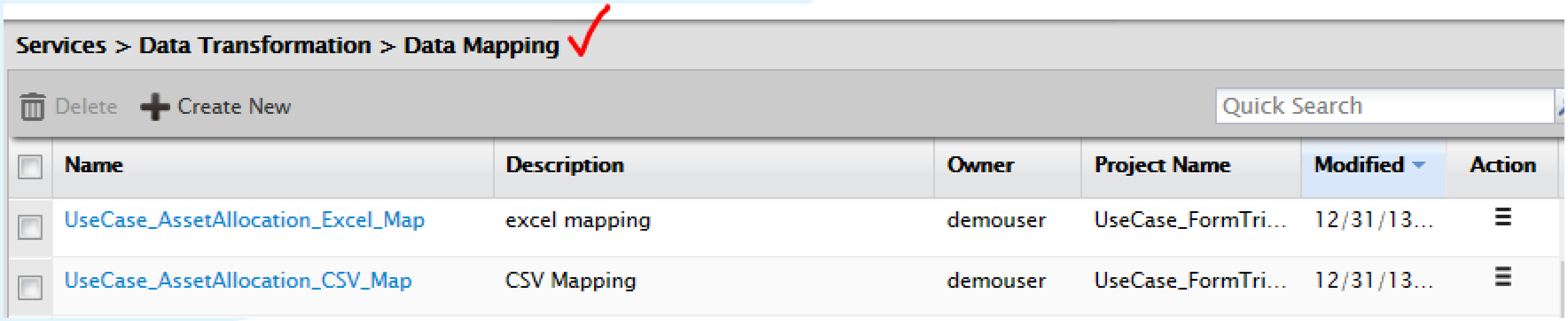
Services > Schema > Text

Delete | Create New | Quick Search

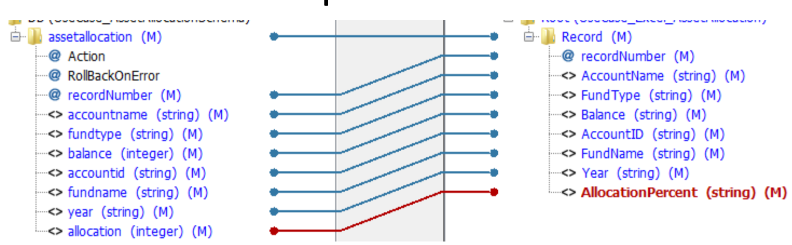
	Name	Description	Owner	Project Name	Modified	Action
	UseCase_CSV_AssetAllocation	csv schema	demouser	UseCase_FormTri...	12/31/13...	☰

Configure – Mapping

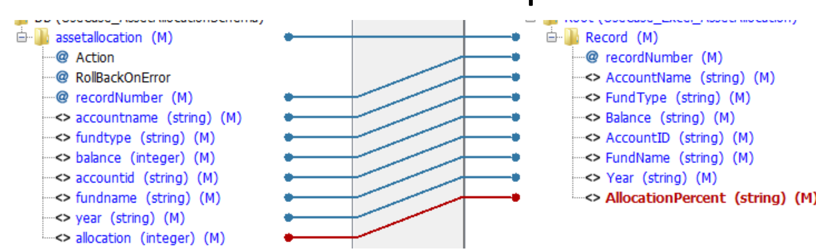
Configure two mapping activities for Excel and CSV output. Refer to the video.



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.

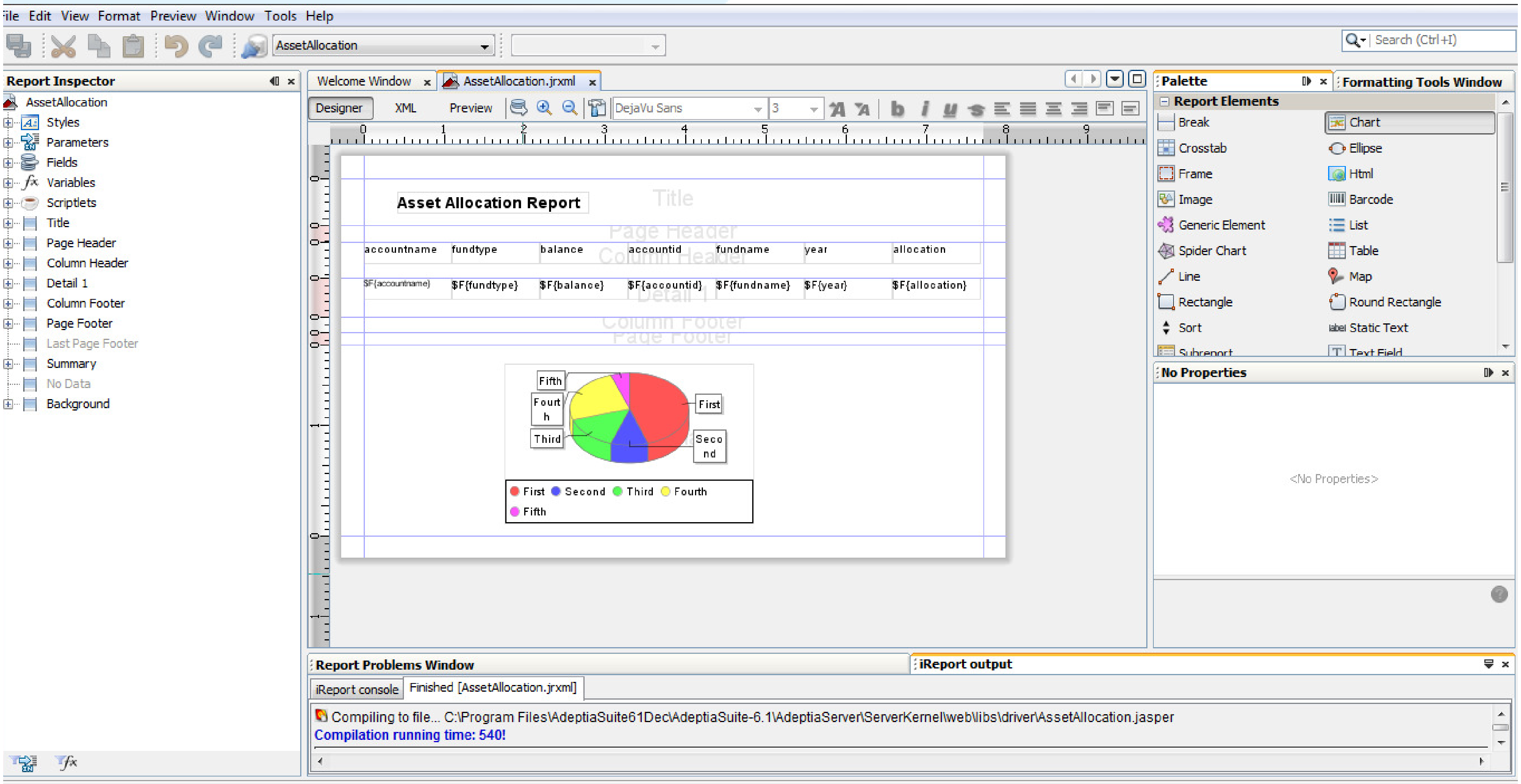
Services > Target > Mail

Delete Create New Quick Search

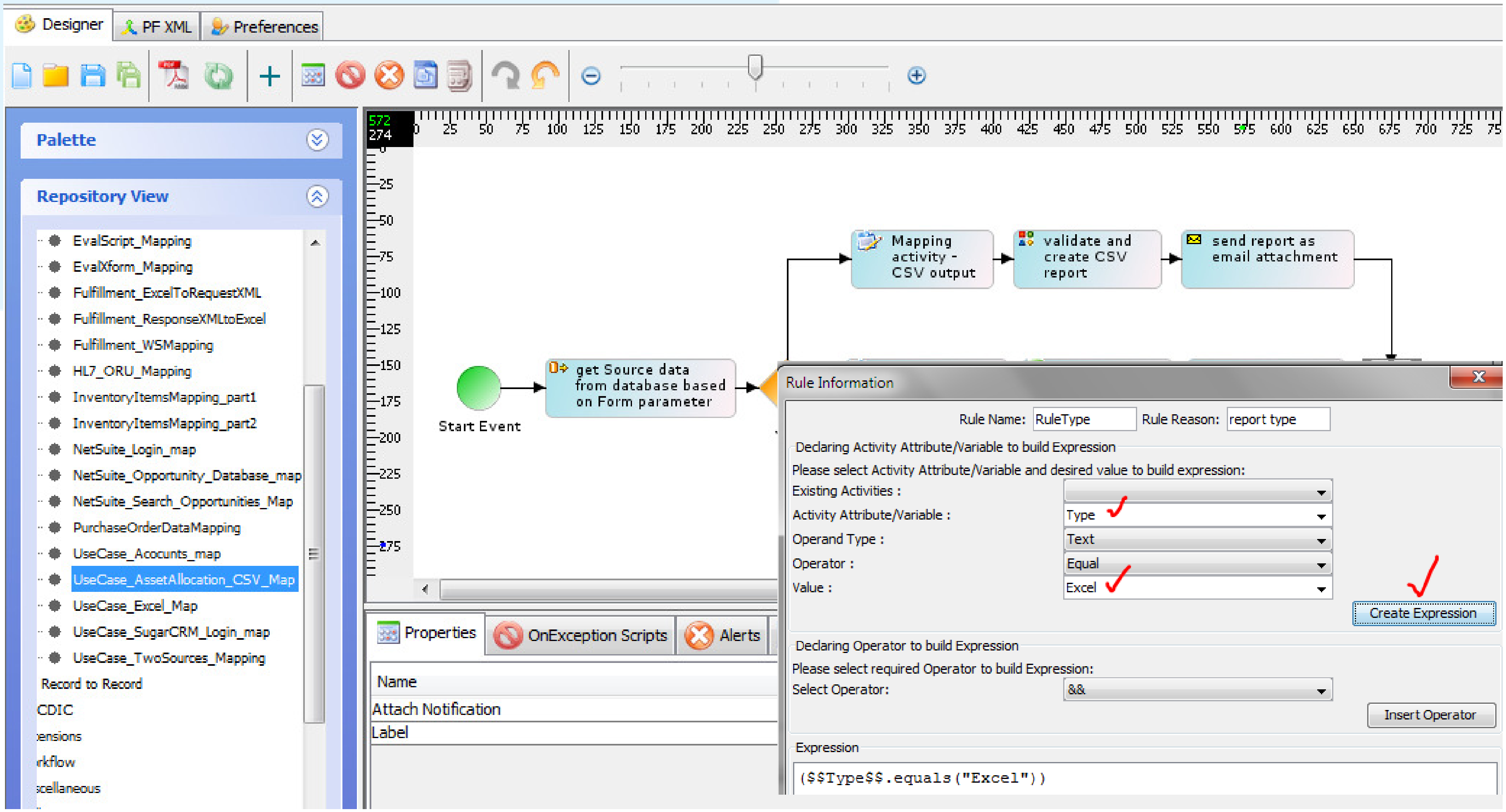
	Name	Description	Owner	Project Name	Modified	Action
	UseCase_PDF_Email	Email that sends out PDF file	demouser	UseCase_FormTri...	12/31/13...	≡
	UseCase_Excel_Email	Email that sends out CSV file	demouser	UseCase_FormTri...	12/31/13...	≡
	UseCase_CSV_Email	Email that sends out CSV file	demouser	UseCase_FormTri...	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.

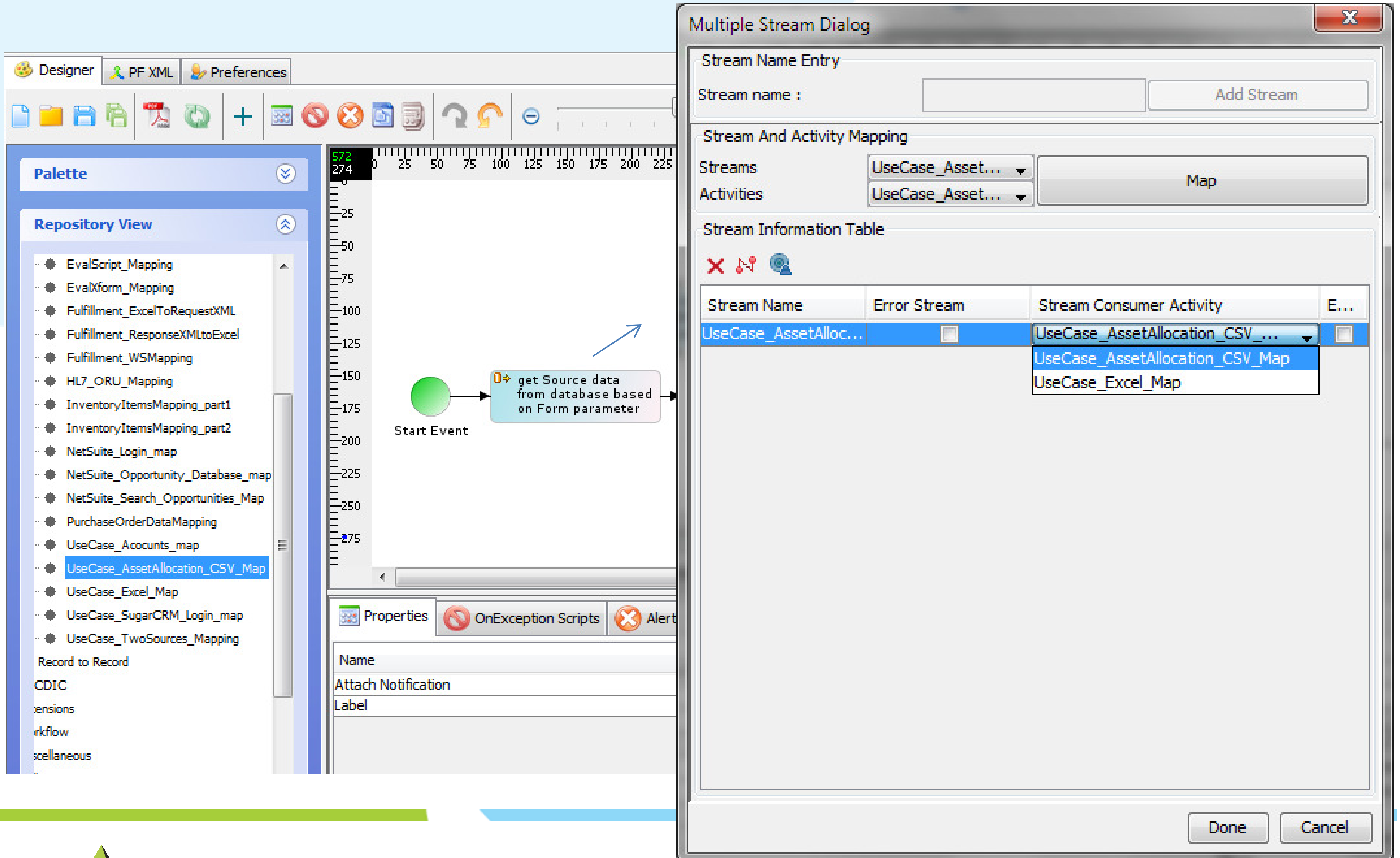


Configure – Gateway Rules in Process flow



ADEPTIA

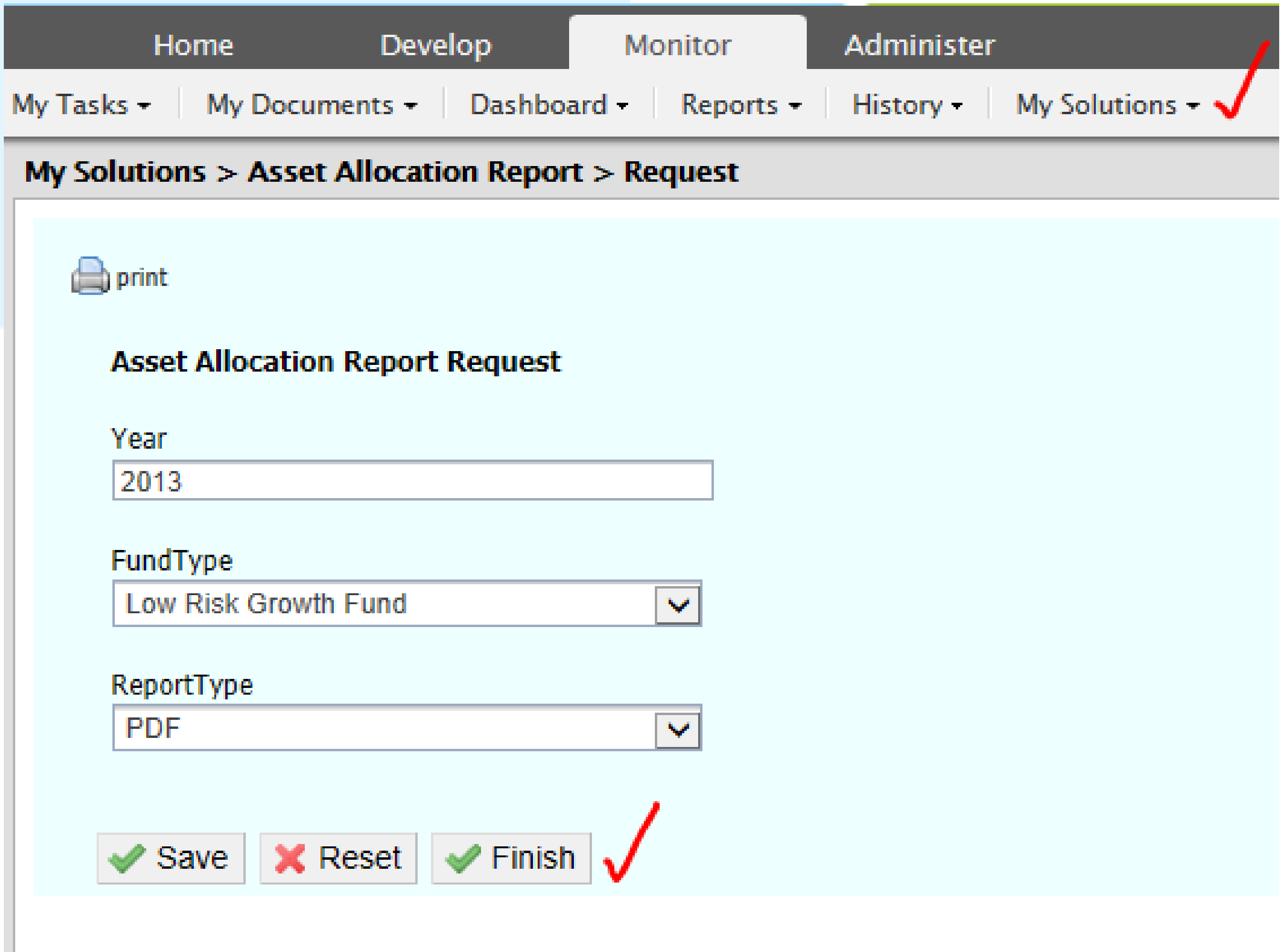
Configure – Multiple Stream in Process flow



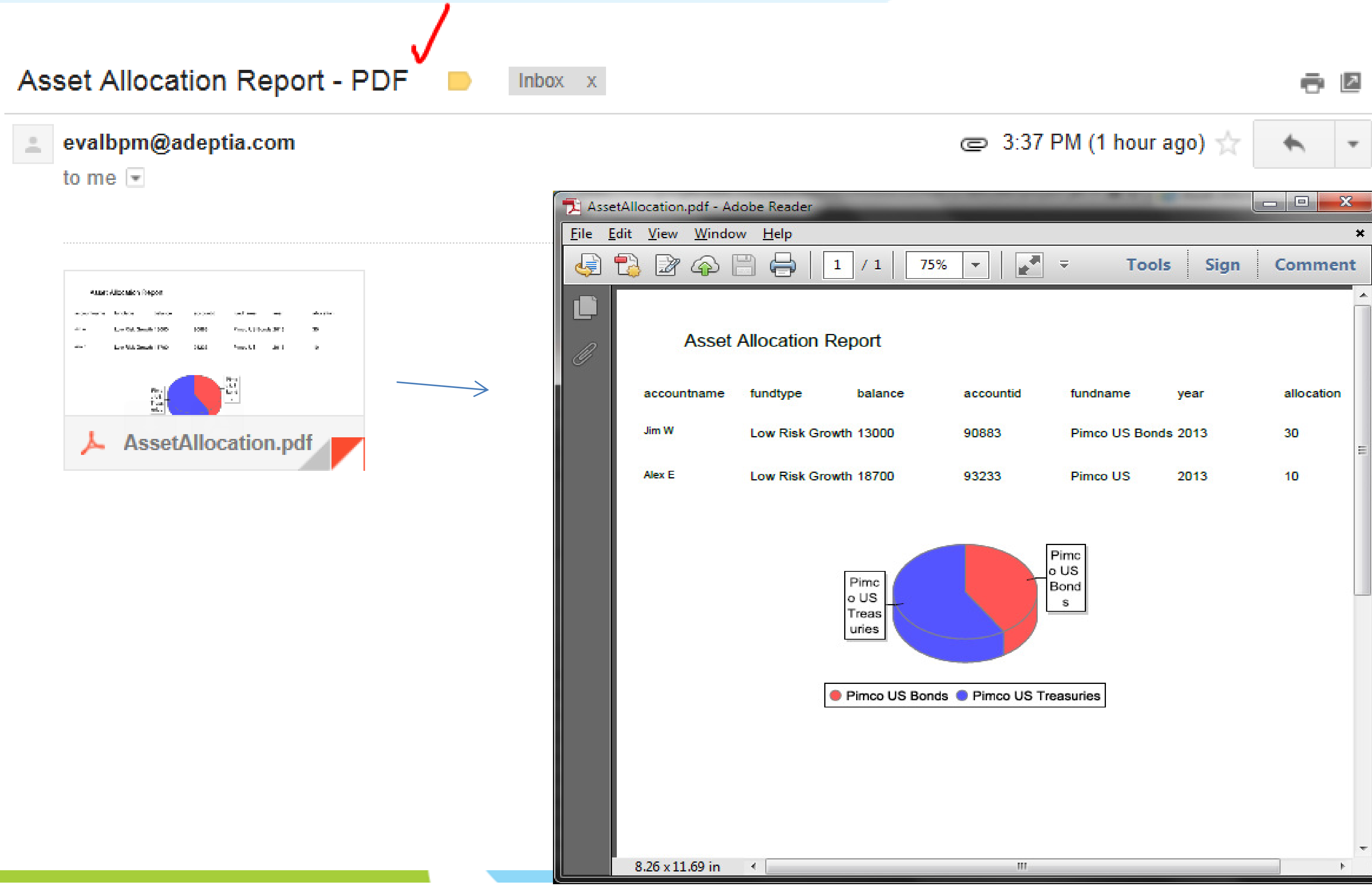
ADEPTIA

Deploy – Submit Web Form & trigger process

Submitting a Web Form automatically trigger the attached process flow.



Results – Here is a sample email with attachment



ADEPTIA

Project: View and manage activities for this use case

Projects

List of activities included in project "UseCase_FormTrigger" ✓

Back   Move   Quick Search

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

Leading the **Integration** Revolution

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

Thank You!

ADEPTIA