APIANT

Automation Editor Guide

July 1, 2019

APIANT

PROPRIETARY NOTICE

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For additional information, please contact:

APIANT, Inc.
196 West Ashland Street
Doylestown, PA 18901

Email: support@apiant.com

APIANT

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Introduction

The APIANT Automation Editor Guide is for semi-technical people who want to learn the basics of using the Automation Editor to build automation solutions.

APIANT overview

What is APIANT?

APIANT is a system for leveraging API's to build automated workflows and visual widgets. APIANT provides advanced technology for building solutions that access, process, and output data easily and flexibly.

APIANT is browser-based. All solution development occurs within a web browser.

APIANT can build automations. APIANT can build automations that perform data processing among multiple API's. Automations consist of one or more triggers and one or more actions plus optional conditional logic. If the trigger criteria are met, the actions are invoked. Conditional logic can be used to execute certain actions. Conditional logic can be nested.

API integrations can require no coding. Visual wiring diagrams, called Assemblies, allow data processing modules to be connected and configured to send/receive data from API's and perform data processing logic. Nested assemblies can be created, called subassemblies. Subassemblies allow modularized, re-usable data processing components to be built. Extension modules allow inline coding when necessary, using JavaScript, Java, or PHP.

Solutions can run in the browser or on the server. APIANT can not only build automations, but also web services (REST-style API endpoints external systems can invoke), batch processes, and even visual browser widgets. Browser widgets can access server-side assemblies, allowing solutions to distribute their processing as needed.

APIANT is fully extensible. Software developers can extend the system either with inline JavaScript/Java/PHP code or by writing custom software modules using the built-in browser-based Integrated Development Environment (IDE). A full-featured debugger aids module development.

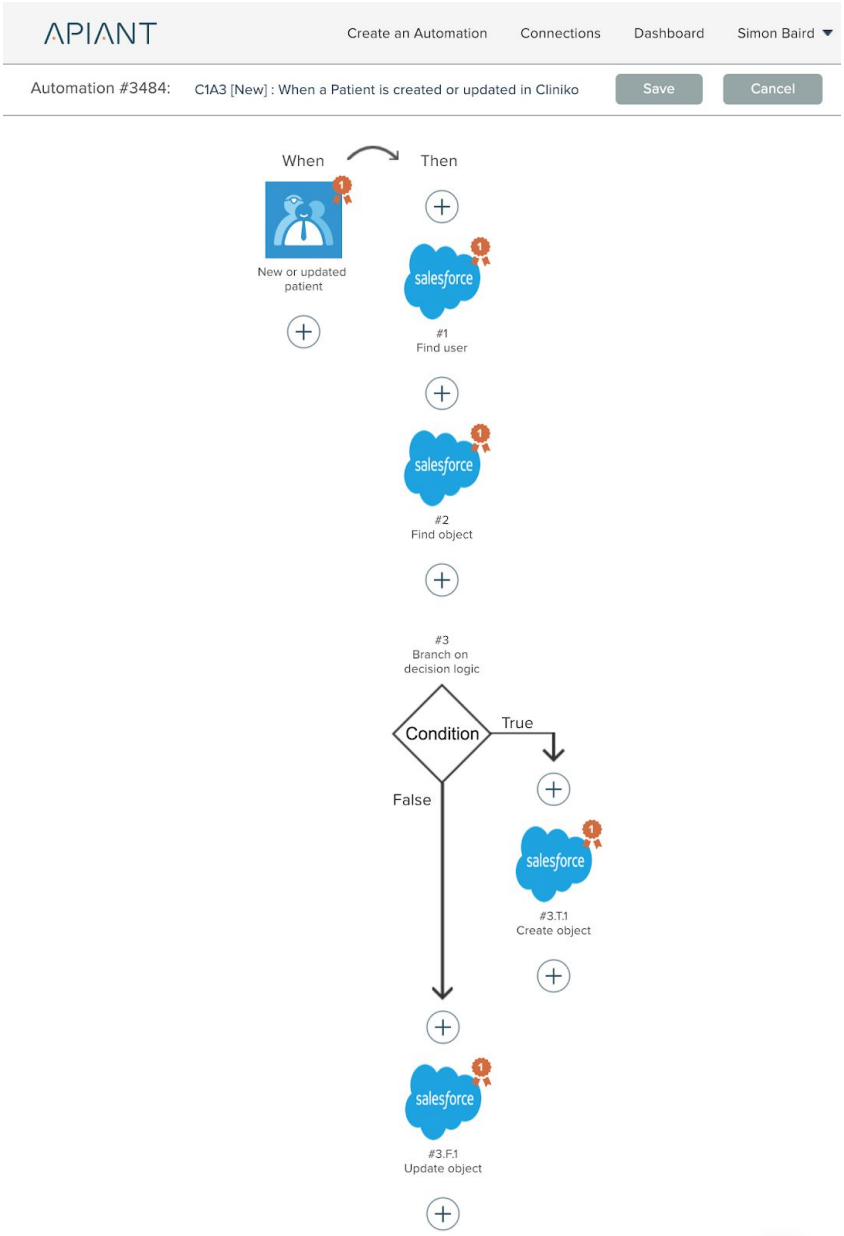
Who can use APIANT?

APIANT is designed to be used by people of varying technical skill levels:

- Non-technical people can build automations with the Automation Editor that perform actions when trigger criteria are met.
- Semi-technical analysts with knowledge of XML can construct assemblies that process data and perform logic without coding.
- Business-level developers with some knowledge of JavaScript can create more sophisticated solutions, by writing logic and connecting components together to form larger solutions.
- Software engineers can extend the system by building custom software modules using JavaScript/Java and the provided Module API.

APIANT

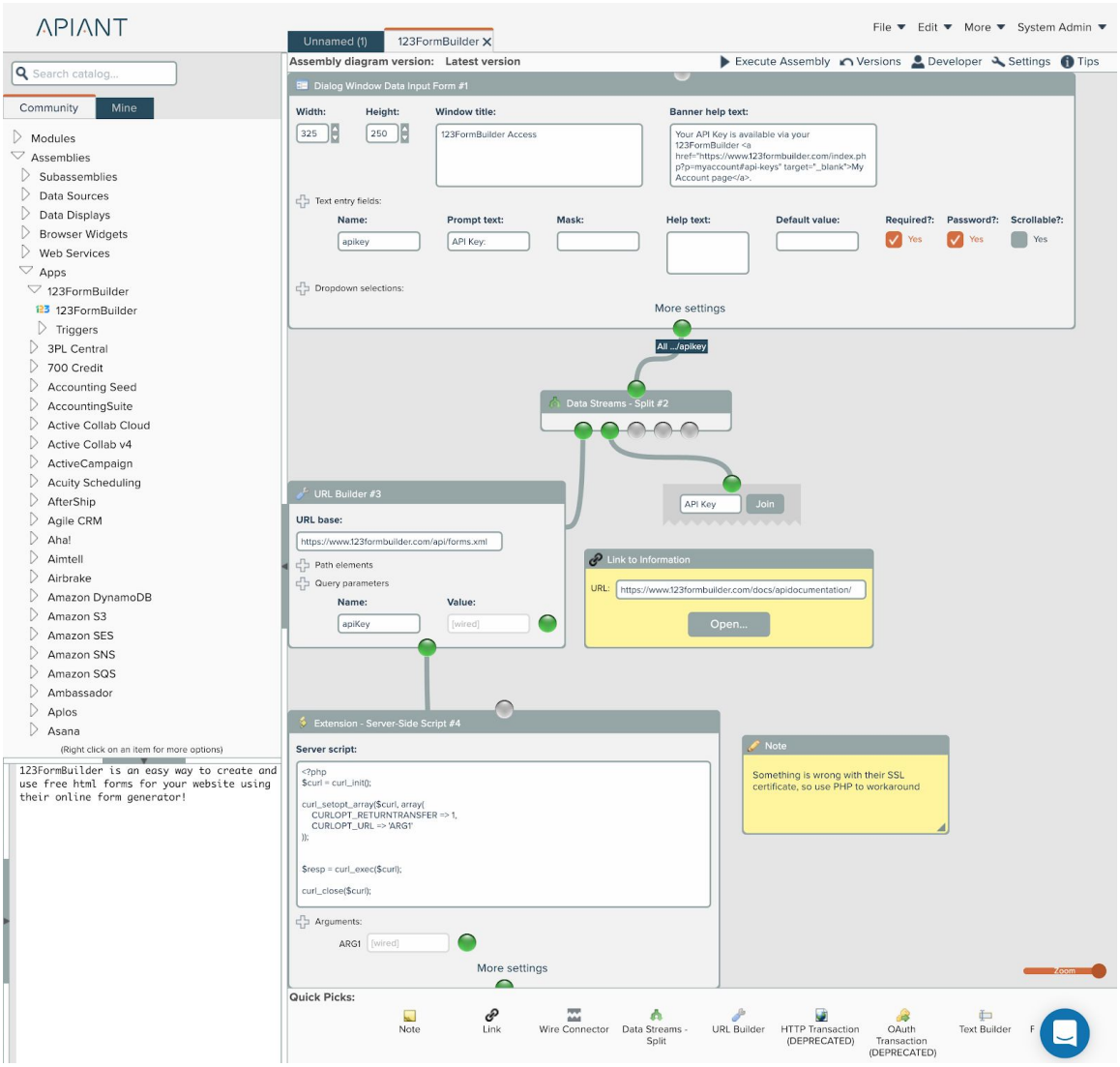
APIANT's Automation Editor can be used by non-technical people to build automated workflows.



Automations can consist of one or more trigger criteria coupled with one or more actions to be performed. Actions can be branched using conditional logic. Nested conditional logic branches can be built.

Apps, triggers, and actions are all integrated via Assembly Editor diagrams, making the Automation Editor fully extensible.

All automations and widgets in the system are composed of one or more assemblies built with the Assembly Editor.

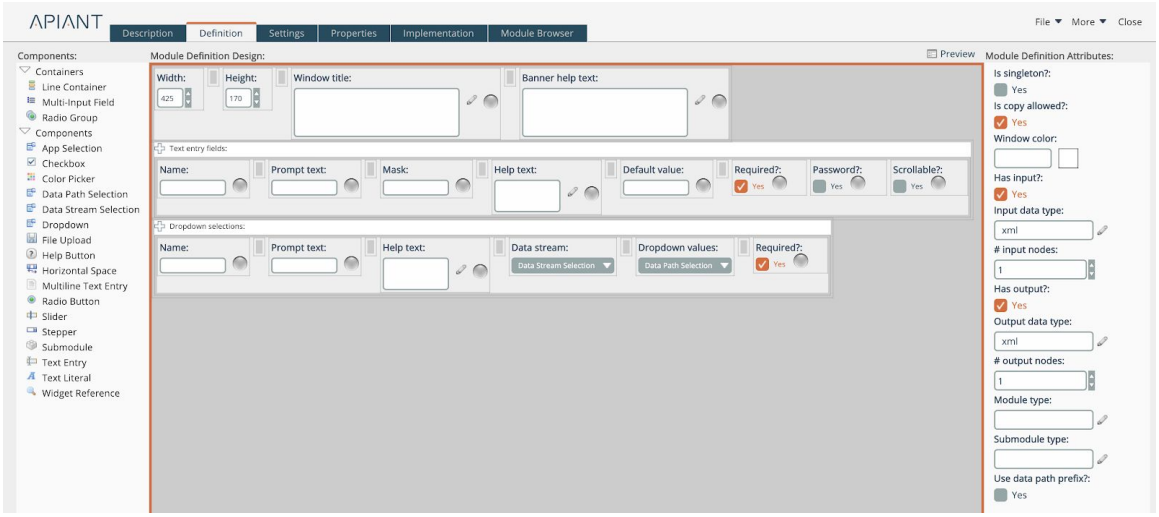


An assembly is a collection of software modules configured to perform processing. Software modules perform data input, processing, and output.

Nested assemblies can be created, called subassemblies. Subassemblies help to manage the complexity of assembly diagrams by forming modular, reusable components.

Assemblies may run either in the browser or on the server. An assembly running in the browser can invoke one or more assemblies on the server, which in turn can invoke other server-side assemblies.

Assemblies are composed of one or more software modules, created with the Module IDE.



The Module IDE provides all the facilities needed to build and troubleshoot software modules.

The module user interfaces that appear in assembly diagrams are built with the drag-drop WYSIWYG module definition designer shown above.

Modules can have properties that control their runtime behavior. A drag-drop WYSIWYG property designer is used to design how module properties appear.

A browser-based code editor is used to develop the module implementation using JavaScript/Java. The UI for visual modules can be designed with a WYSIWYG designer.

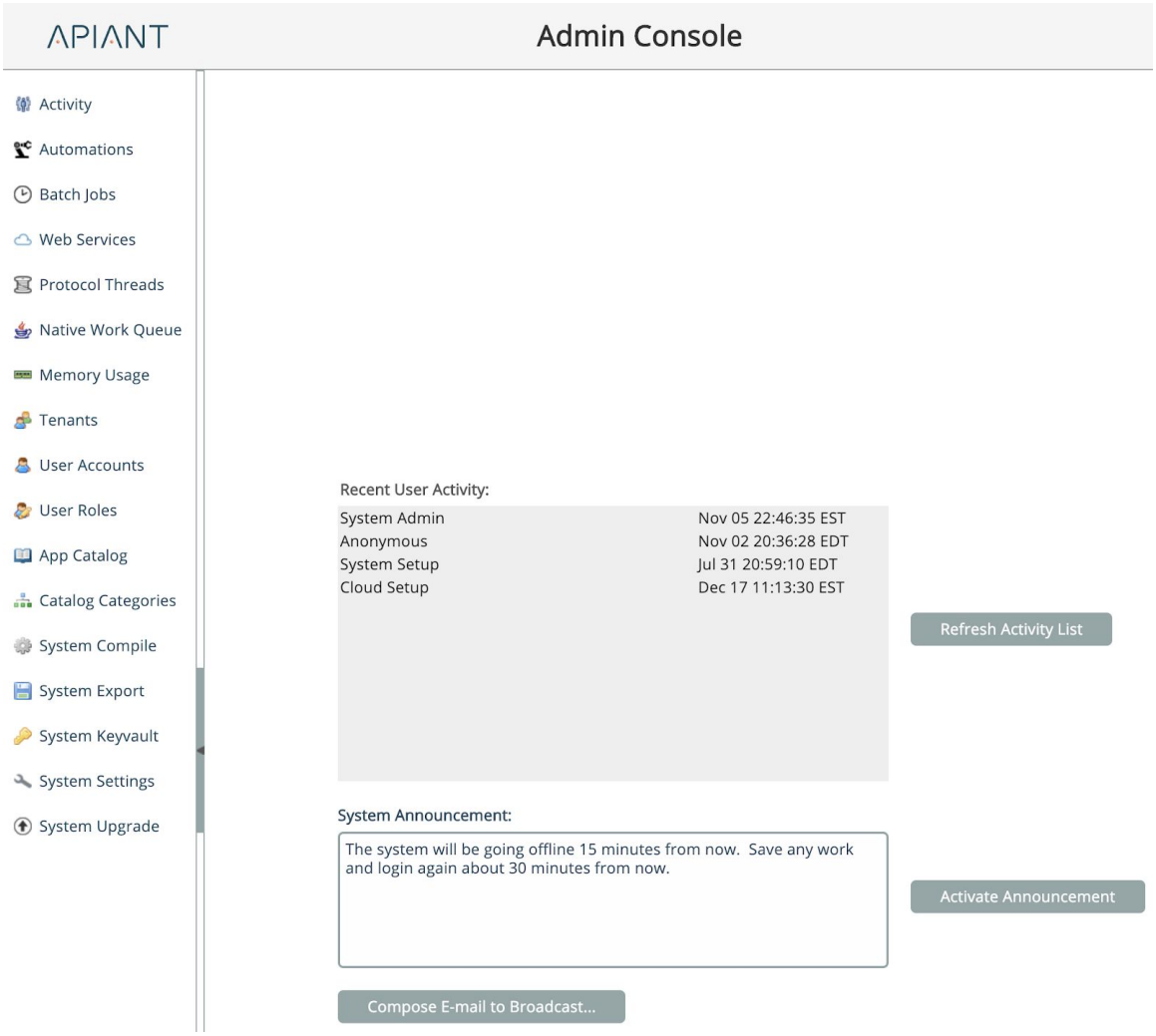
Class libraries can be developed, to create reusable modules that can be shared across module implementations. The system provides many class libraries used to construct the system itself.

Server scripts can be developed from the IDE, using languages installed on the server like JSP or PHP. Server scripts help extend the processing of modules, making use of existing libraries.

Module resources like graphic art and audio clips can be uploaded to the server from the IDE.

The Module IDE also provides a full-featured debugger to help troubleshoot modules. The debugger can inspect variables and object instances, monitor class attributes and methods, and evaluate entered expressions.

APIANT includes a comprehensive Admin Console for system administrators. The Admin Console provides system administrators extensive tools and functionality to help operate the system.

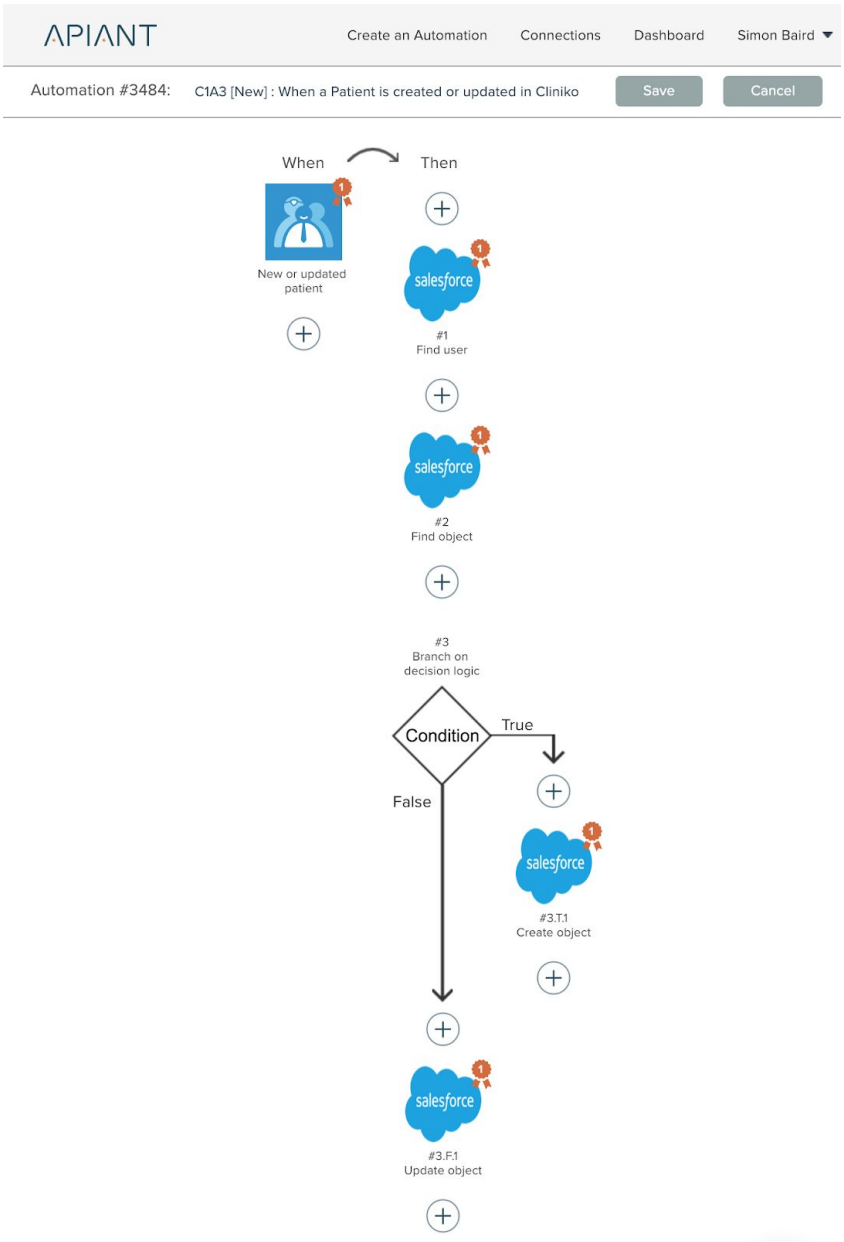


APIANT

Chapter 1: Automation Editor Overview

Automation Editor Overview

APIANT's Automation Editor is a browser-based visual tool for building automation solutions. Triggers and actions are configured together to perform functionality.



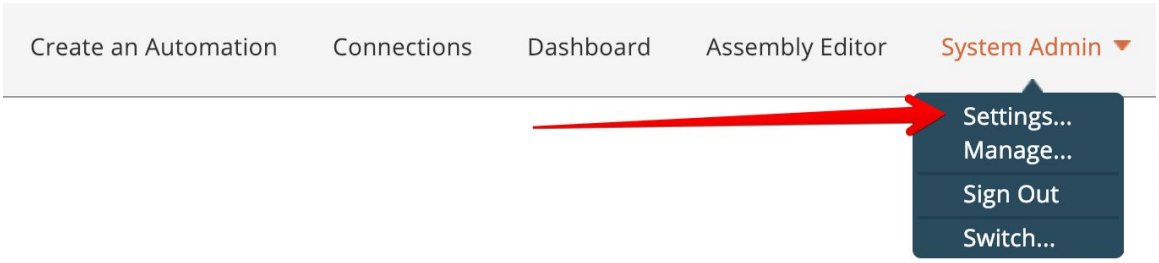
One or more triggers on the left side emit data that meet criteria as determined by the trigger implementations. A common trigger is one that fires when new data is created.

One or more actions on the right side process each emitted trigger data row in succession. Branches can be used to conditionally execute one or more actions depending on logic tests.

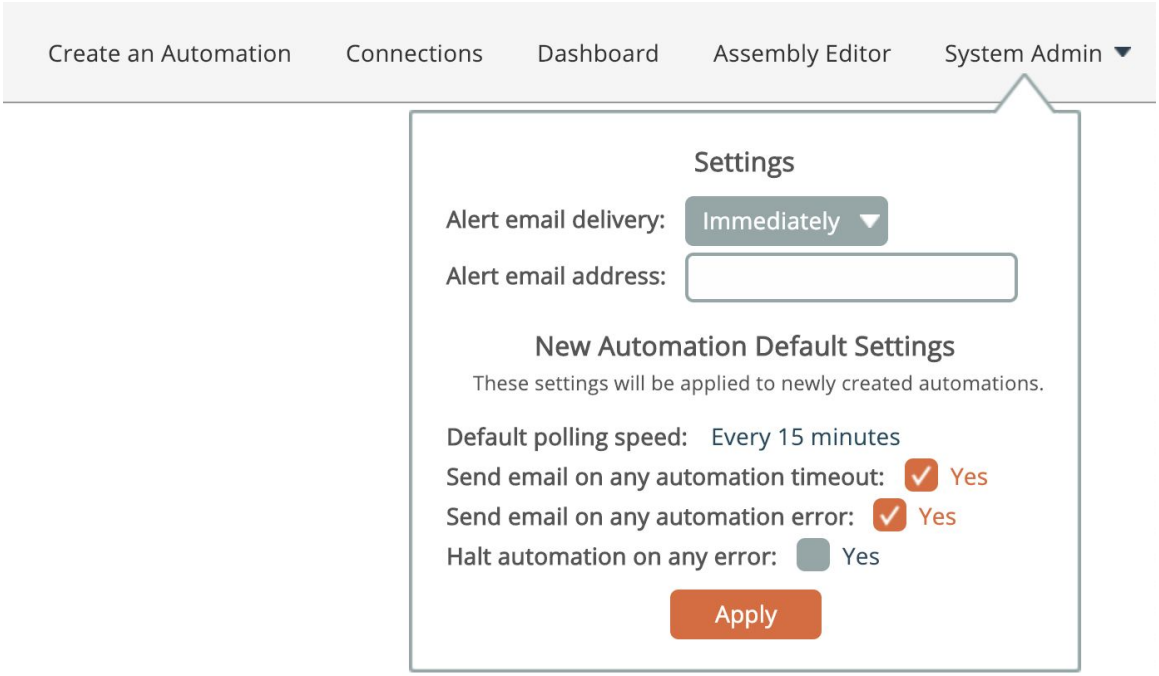
The system contains hundreds of integrated apps and over a thousand triggers and actions. The system can be extended with new apps, triggers, and action using the Assembly Editor.

Account Settings

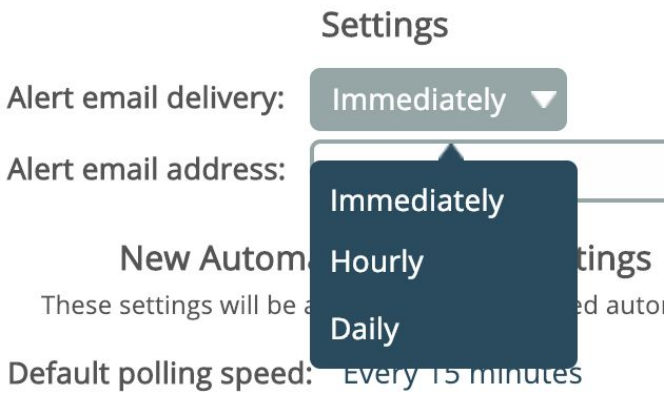
Account settings are accessible from your account menu at the top right:



Your account settings will appear in a popover:

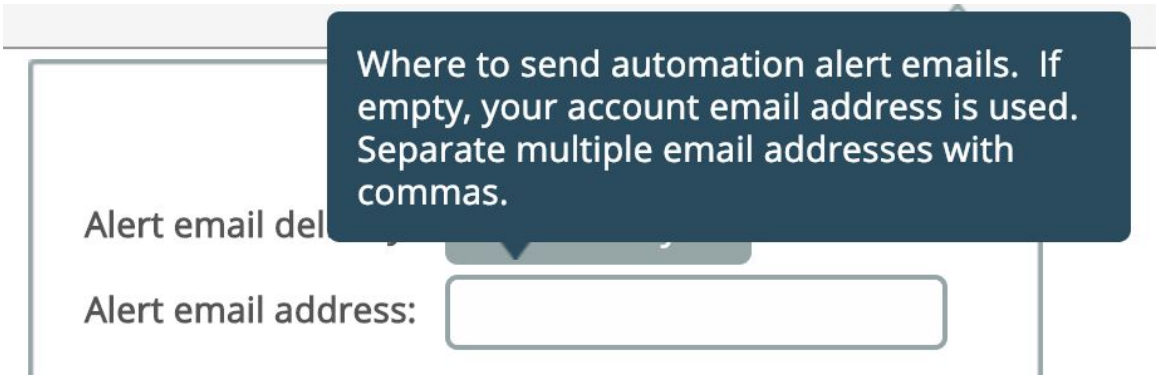


You can configure how often the system sends you email alerts resulting from automation processing errors:



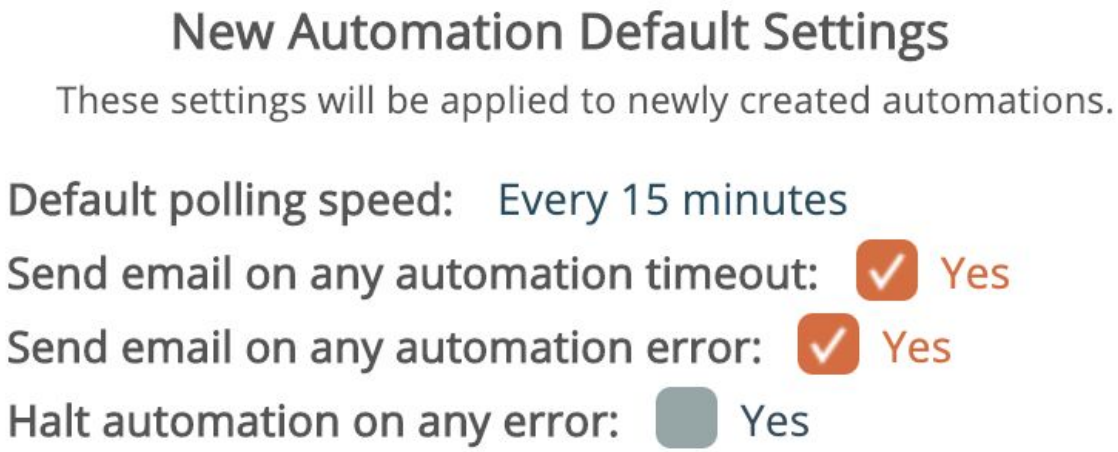
When Hourly or Daily are selected, the system will collect all alerts during that period and send just a single digest email containing all alerts.

By default the system sends email alerts to your account's email address. You can enter one or more alternative email addresses to use instead:



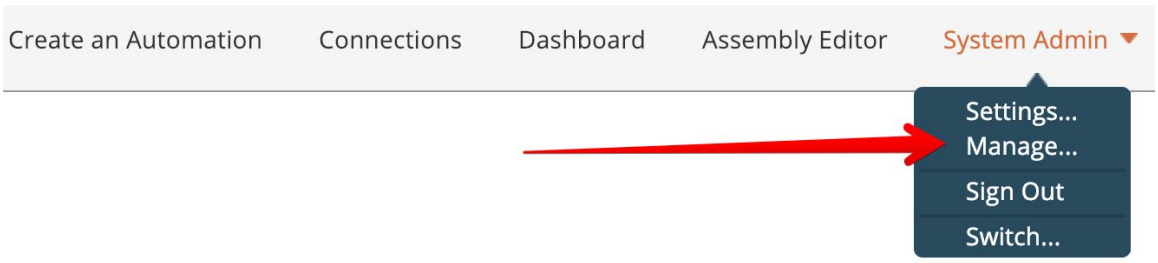
Separate multiple addresses with commas.

The next group of settings only apply for newly created automations:

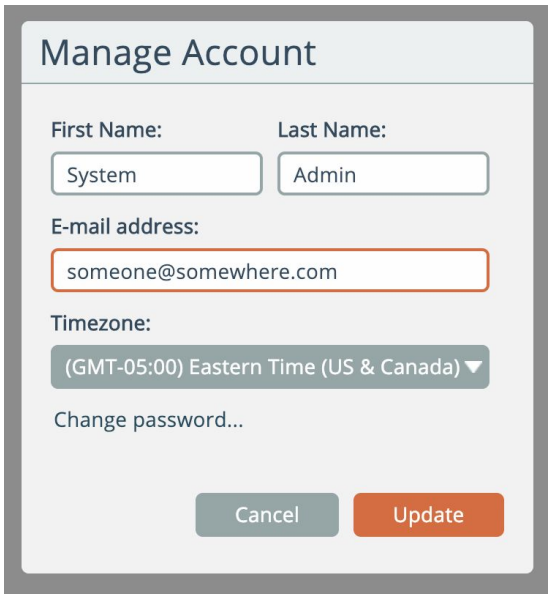


Account Management

You can manage your account from the menu option under your account menu at the top right:



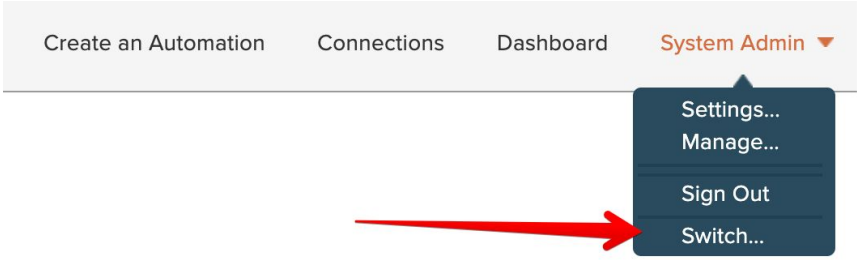
The Account Management dialog will appear:



You can edit your account details and change your password as needed.

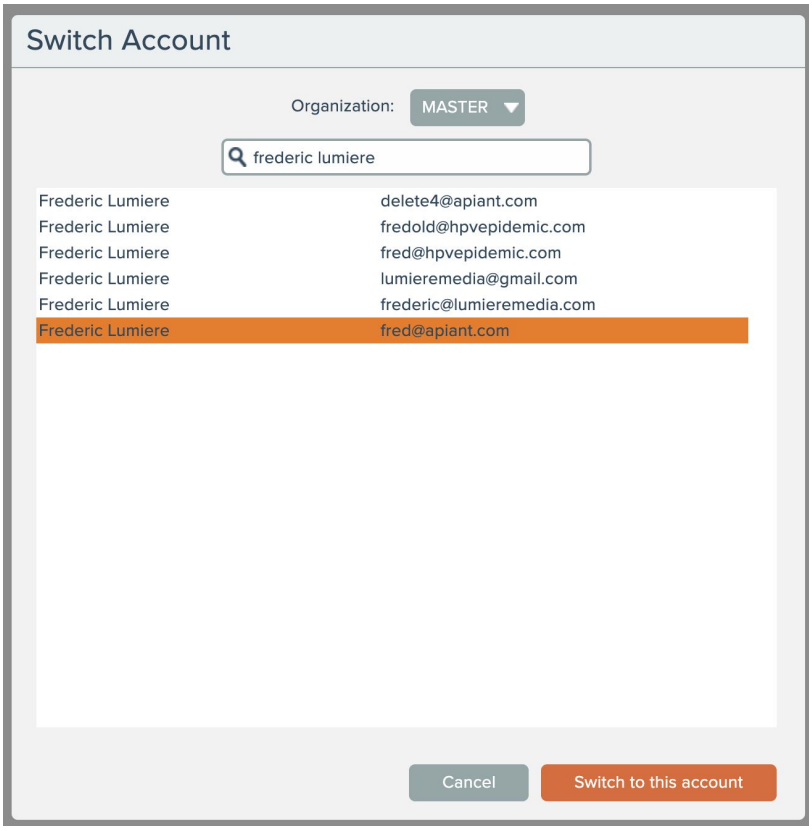
Switch Accounts

The Switch menu option is support-level functionality that allows you to impersonate other accounts:



	Note: This menu option only appears for accounts having the "Switch Account" permission.

An account selection dialog will appear:

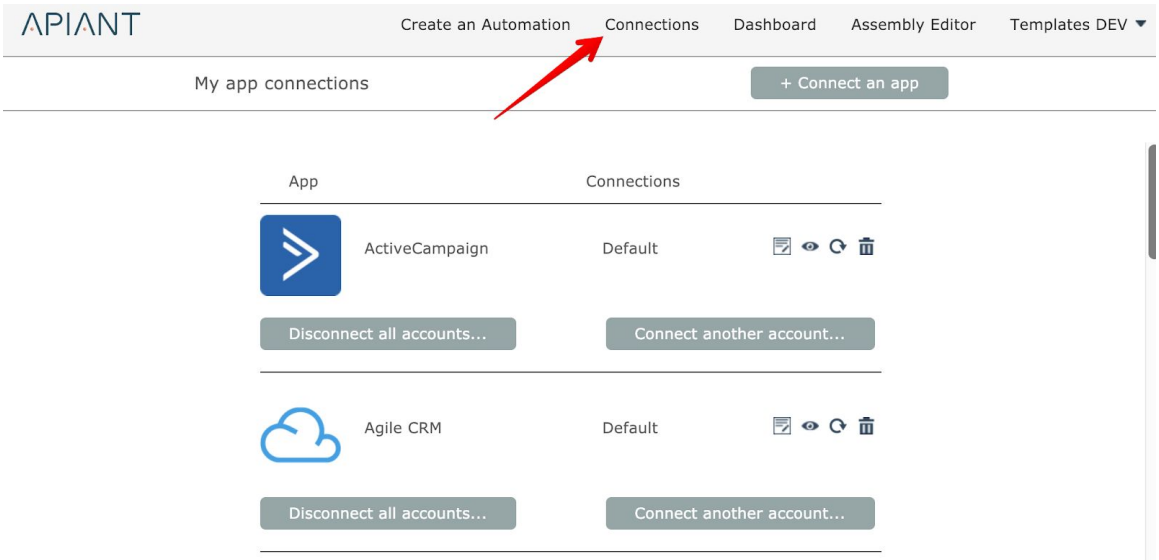


After an account is chosen, the current session will impersonate the selected account.

	Note: Do not switch accounts while editing an automation, or when viewing any account-specific information! It is best to only switch accounts from the dashboard.

Connection Management

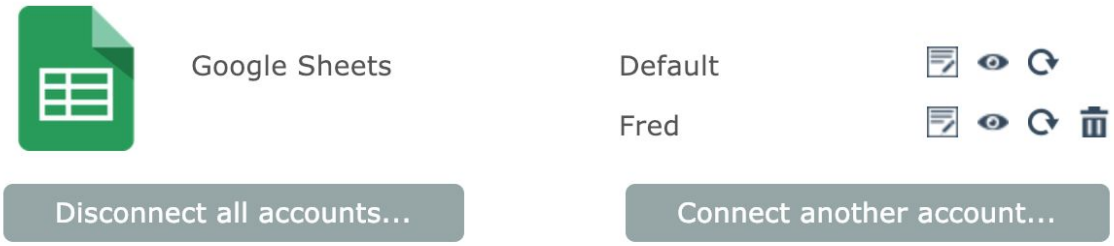
You can manage your account from the menu option under your account menu at the top right:



A list of all your connected app accounts will appear.

You can add an app connection by clicking the **Connect An App** button.

Each app lists its connections:

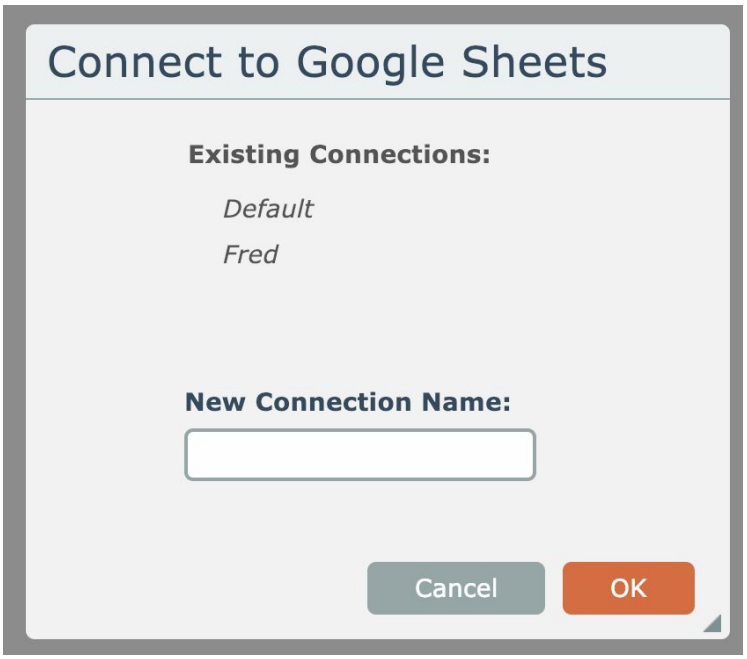


The first connected account is always named “Default”.

All connected accounts for an app can be disconnected by clicking the **Disconnect All Accounts** button.

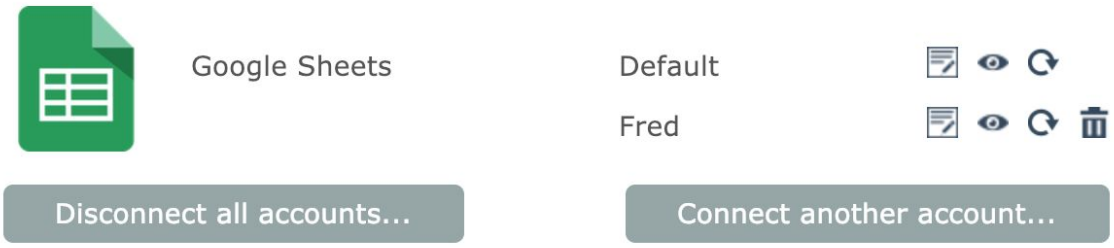
	**Note:** Whenever accounts are disconnected, automations using those accounts are turned off.

Click the **Connect Another Account** button to add a new connection:

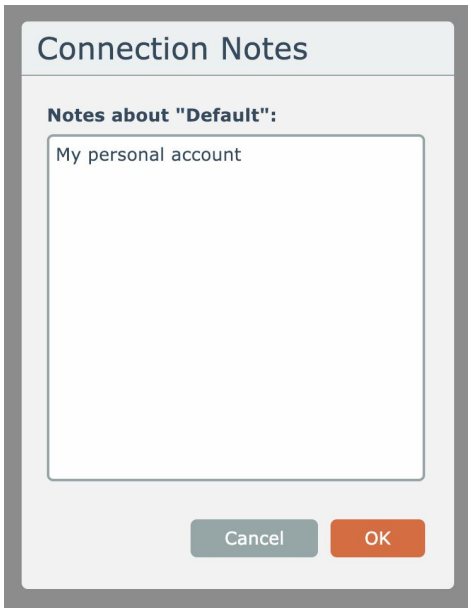


Connection names must be unique. The first connection is always named "Default".

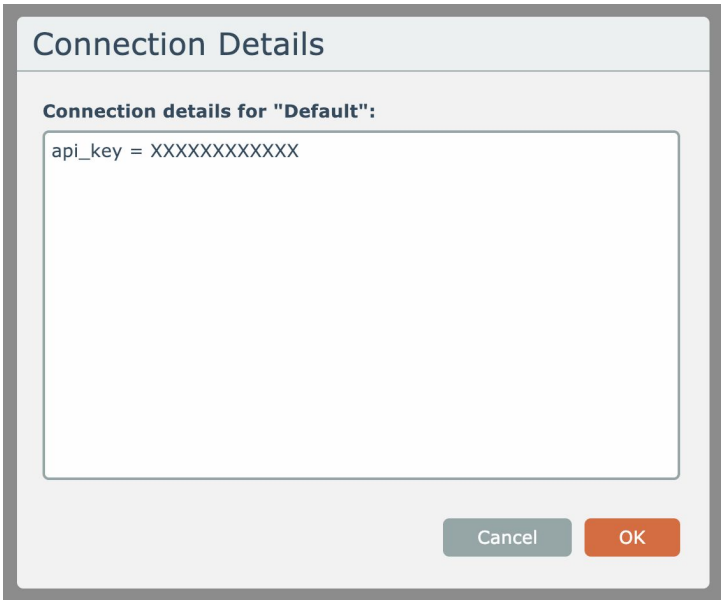
The icons to the right of each account name operate upon each account:



The first note icon can be used to save notes about each connection:



The “eye” icon lets you inspect the connection details:



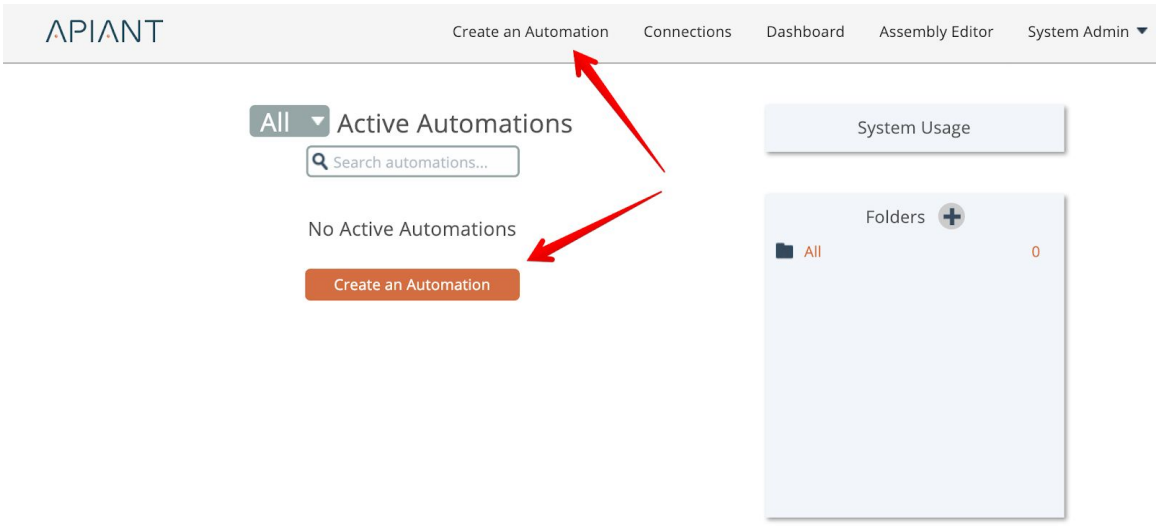
The circular arrow icon can be used to reconnect the account.

The trash can icon will disconnect the account.

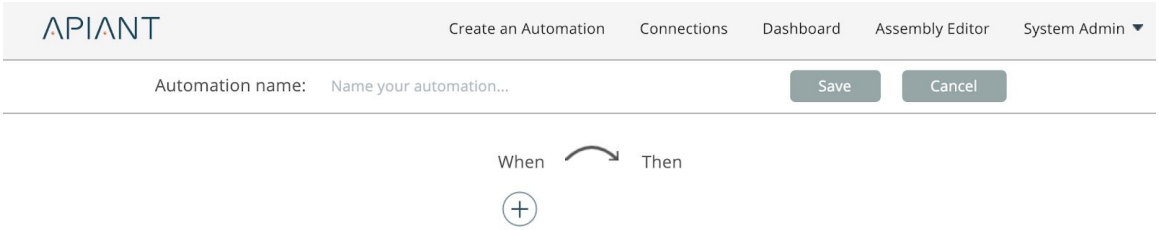
Chapter 2: Building Automations

Building Automations

To build a new automation, from the dashboard click the **Create An Automation** button or choose the link in the top menu.



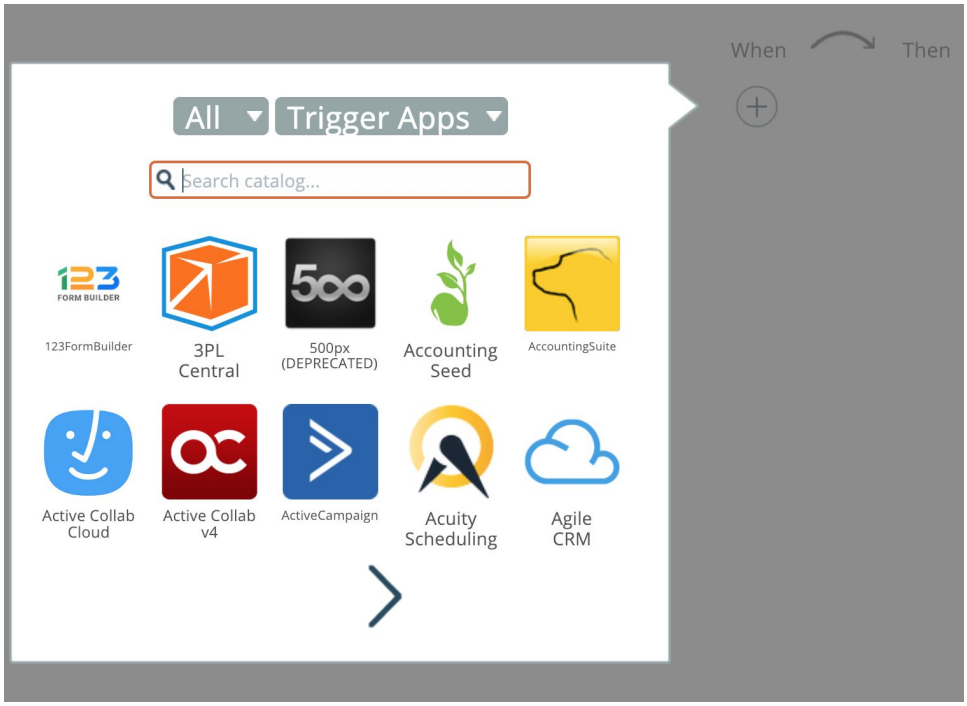
The automation builder screen appears:



You can type in a name for your new automation if you want. If no name is entered, a default name will be shown when the automation is saved.

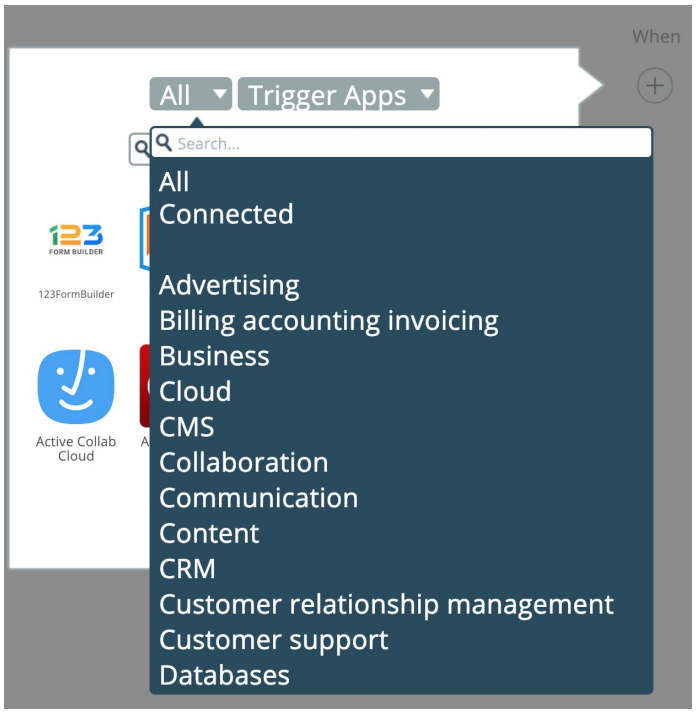
Configuring a Trigger

Begin by clicking the "plus" icon to choose a trigger:

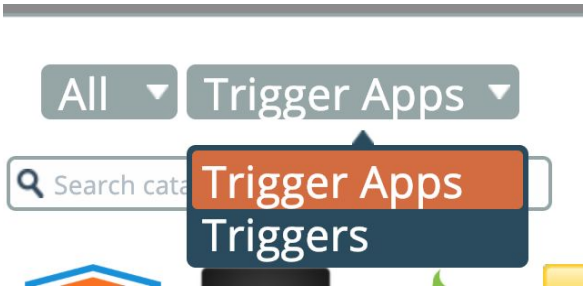


By default, the search field will search the catalog by app names. Only apps having triggers in the system will be displayed.

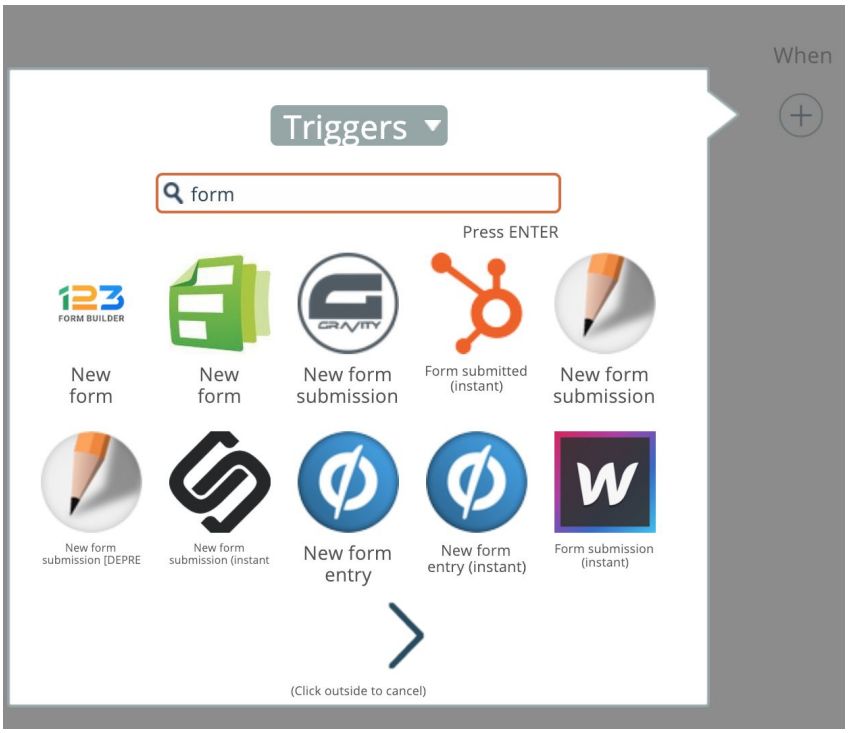
You can search for apps in a certain category by choosing a category from the dropdown list:



You can search by trigger name across all trigger apps by choosing "Triggers" in the dropdown list:

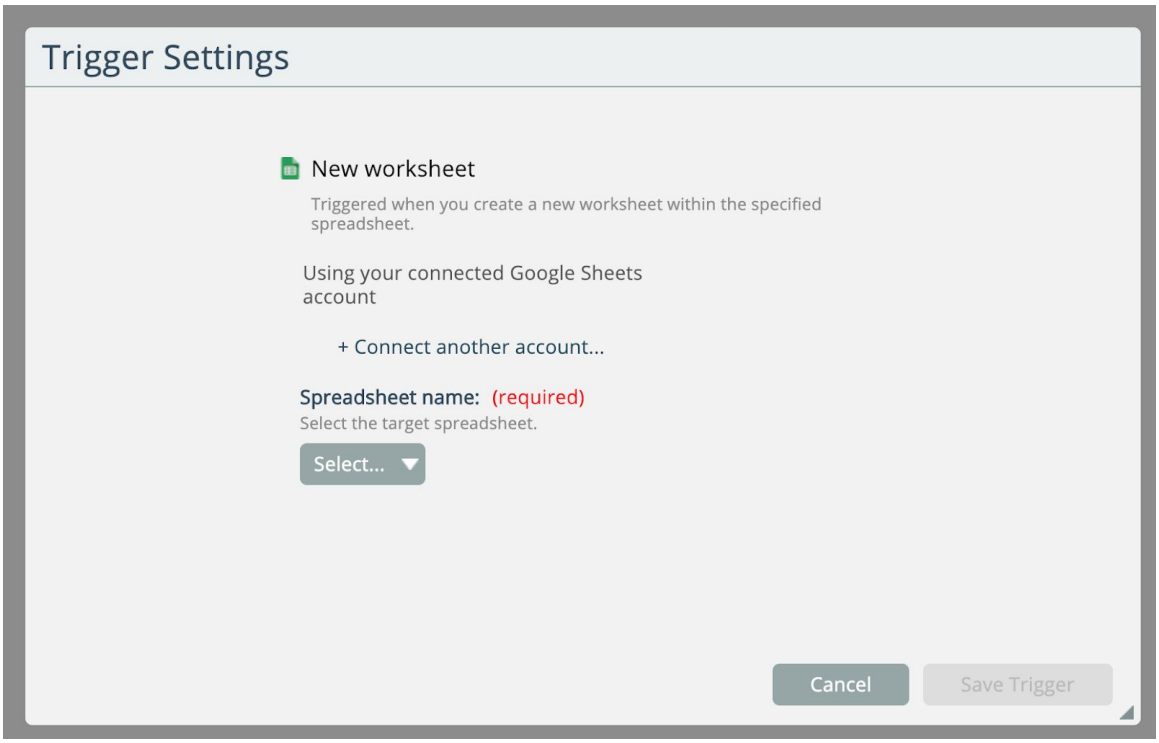


Now you can search for triggers across all apps. Here is a search for all triggers having “form” in their name:



After selecting a trigger app or trigger, you may need to connect an account in order to use the selected app. The system will walk you through the steps needed to connect an account, if needed.

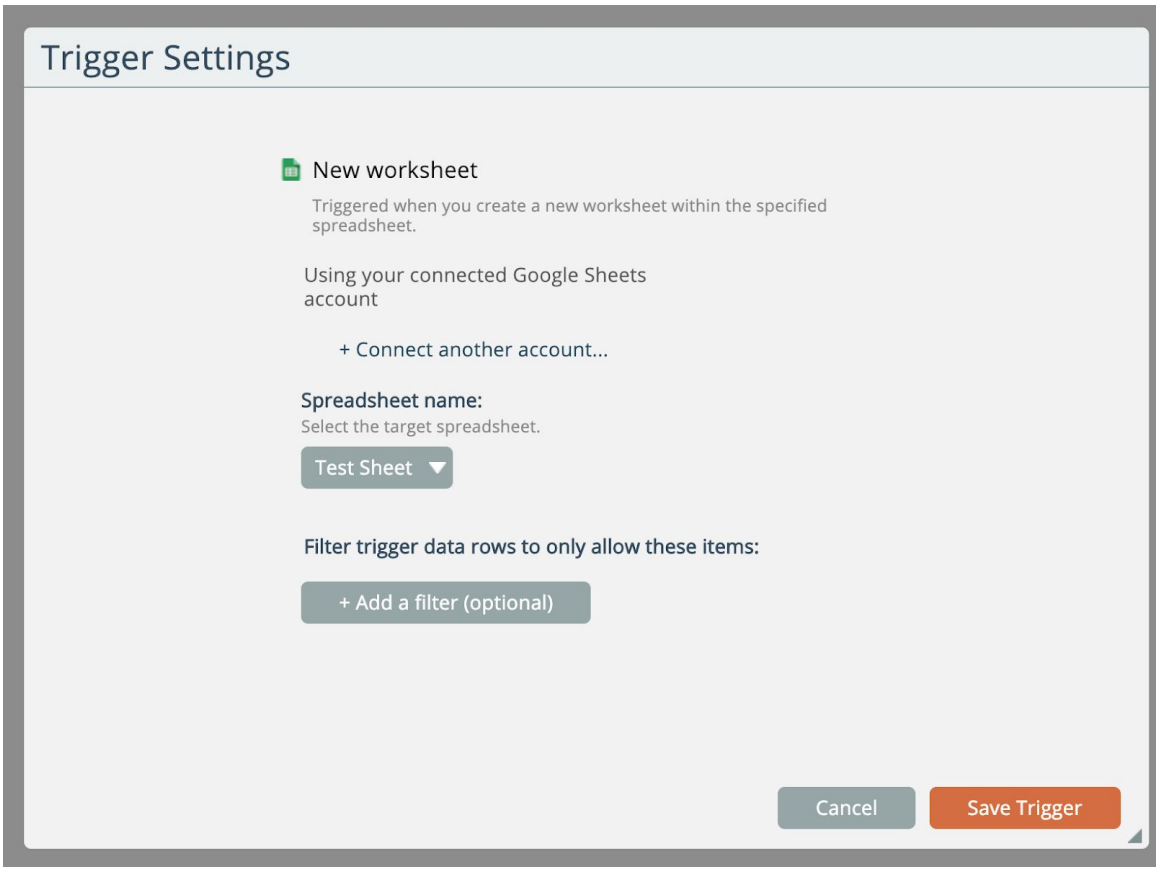
Once the needed credentials for the trigger app have been obtained, the trigger settings configuration dialog will appear:



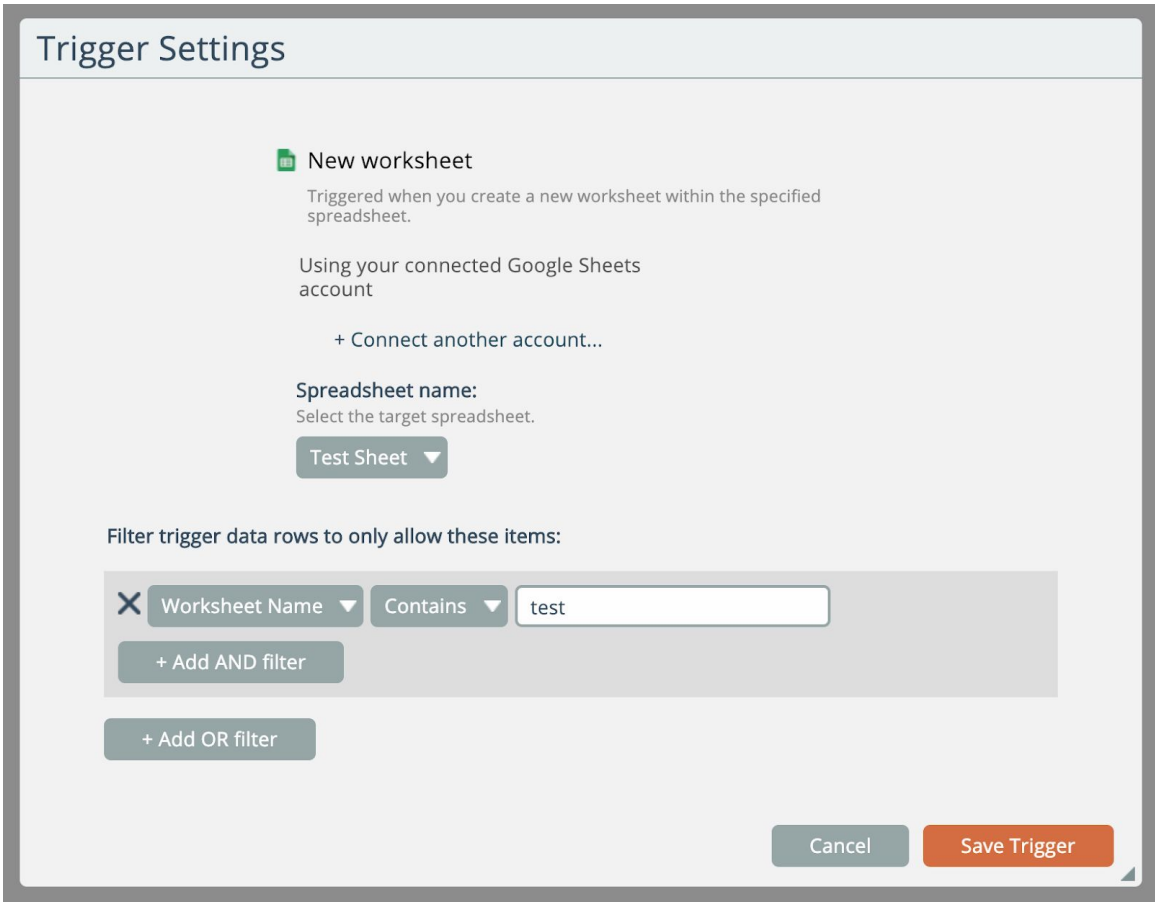
The content of this dialog will vary depending on the selected trigger's needed settings.

Configuring a Trigger Filter

After the trigger's settings are configured, a button appears that let you define a Trigger Filter:

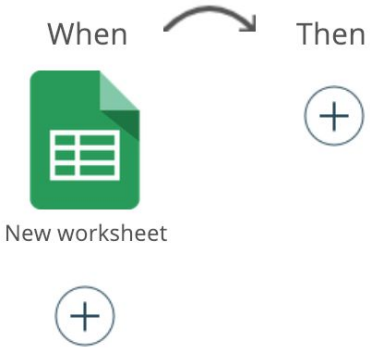


A Trigger Filter only allows data rows matching the entered criteria to be processed by the automation's actions.



The Trigger Filter can contain complex AND and OR logic that operate upon data fields emitted by the trigger.

Click the **Save Trigger** button when done configuring the trigger. The trigger will appear in the automation builder:



You can optionally add additional triggers if needed. Multiple triggers will result in the actions being performed when any trigger emits data.

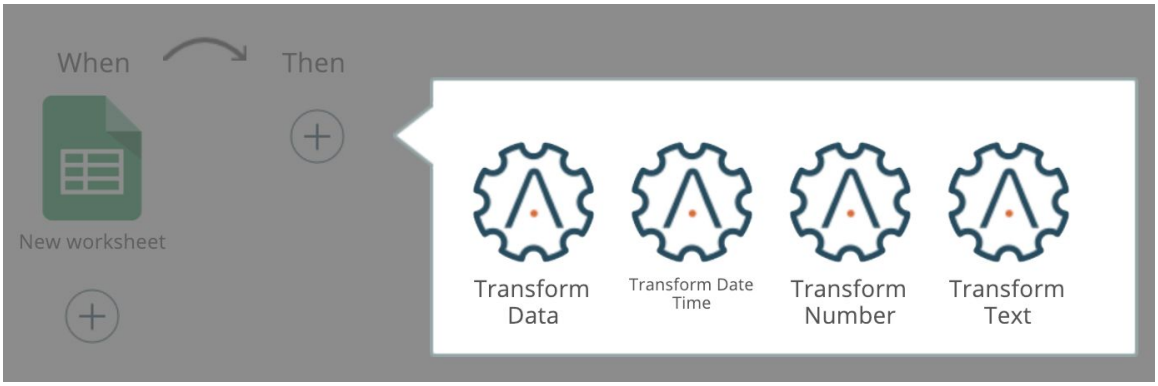
The most common use for multiple triggers is for two-way sync automations, that bi-directionally mirror data across two apps.

Configuring an Action

Click the "plus" icon on the right side to choose an action:

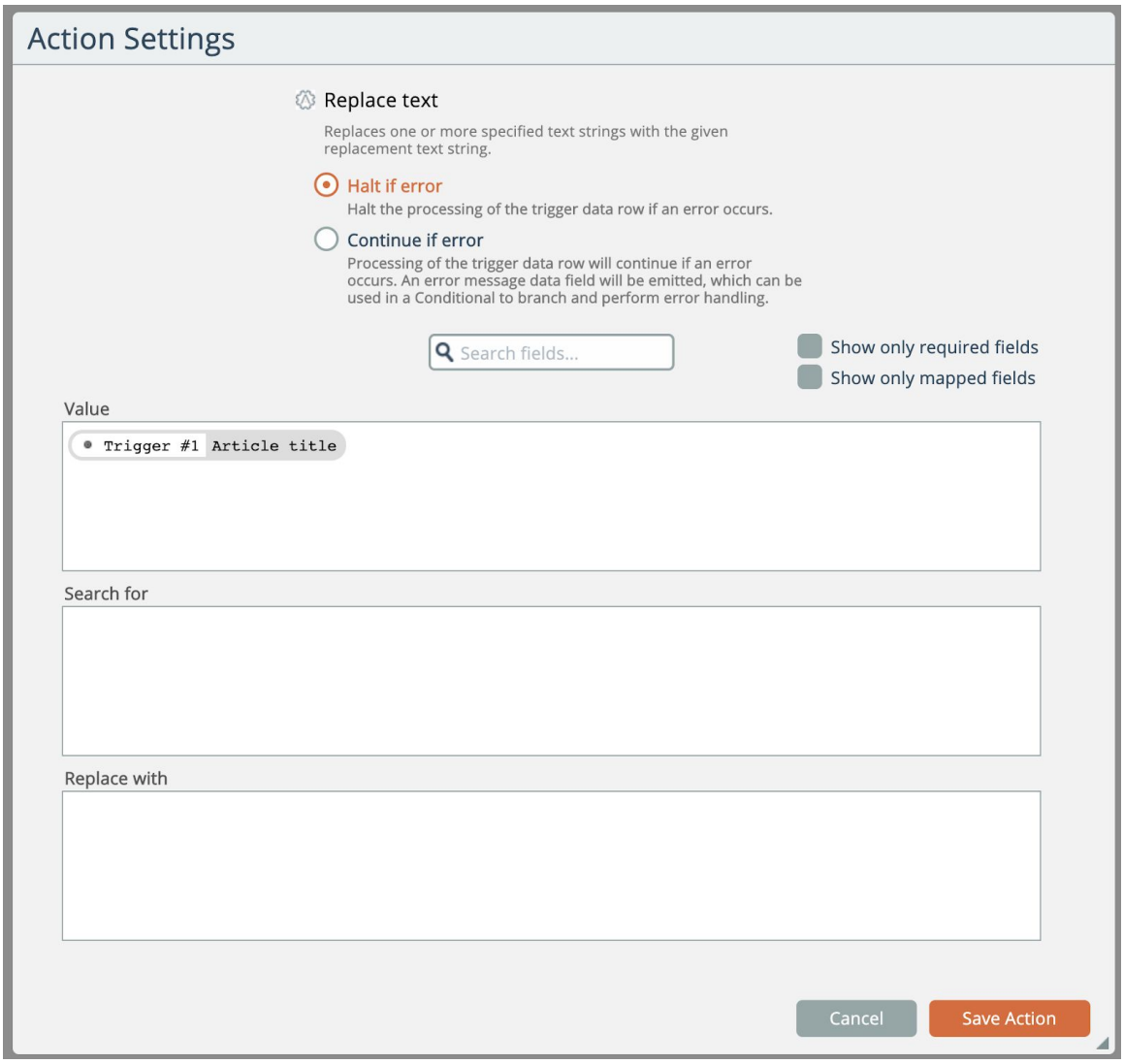
The first option lets you select an app from the catalog as is done for triggers.

The "Transform data" option is an abbreviated catalog that just contains built-in system apps that perform common data transforms:



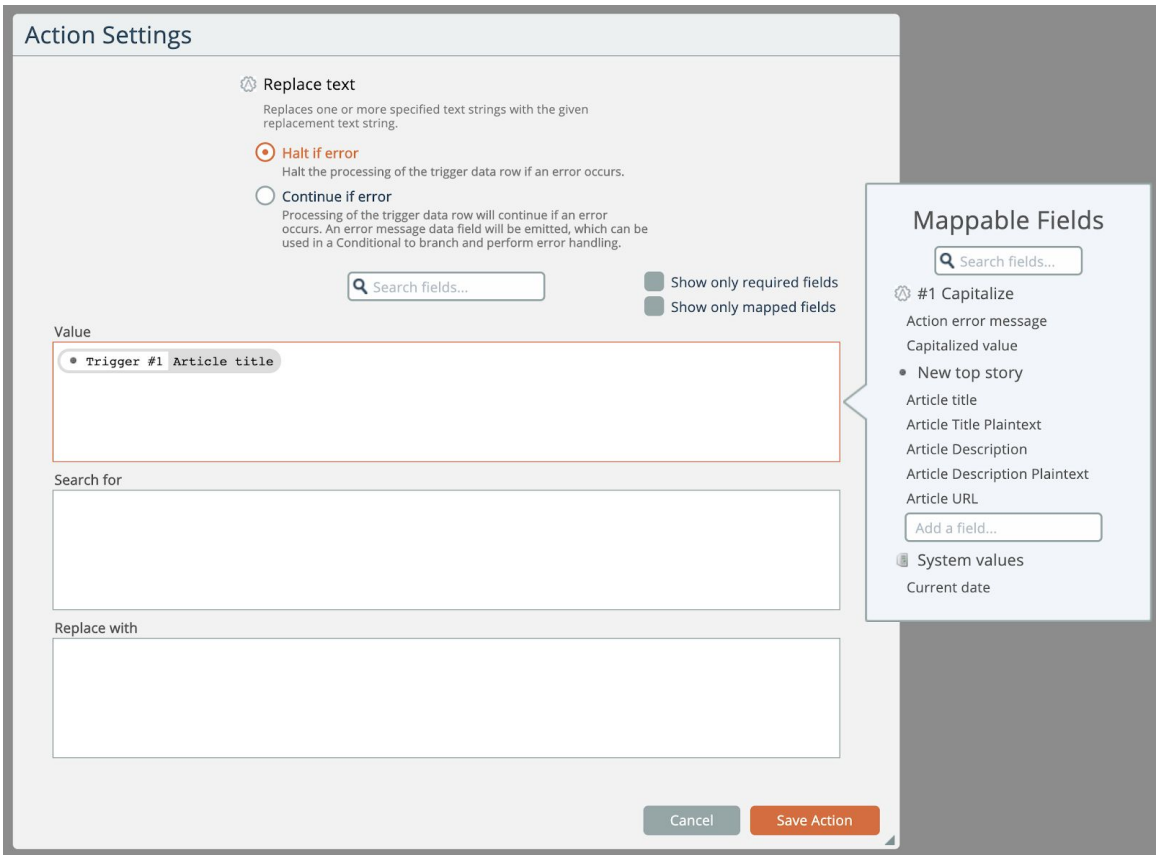
Mapping Data Fields

Action settings are configured similarly to trigger settings, but with the additional capability of mapping data fields to the action's inputs:



The content of this dialog will vary depending on the selected action's needed settings and mappable data fields.

Click in a data field to edit it:



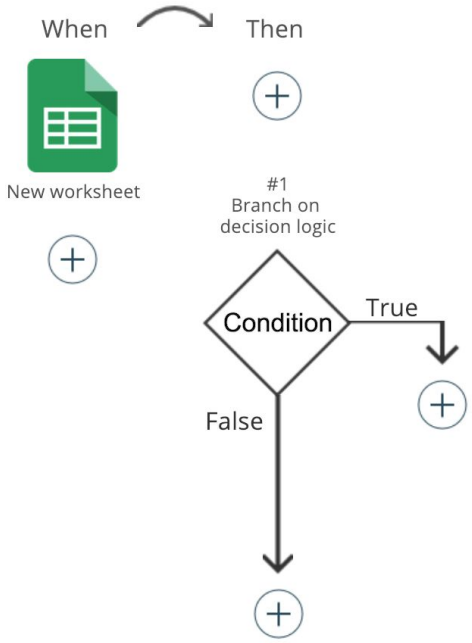
A list of mappable data fields will appear. Data fields from triggers or previously executed actions are available.

Selecting a data field will add it at the current cursor position in the edit area.

	**Tip:** You can type in textual data into the edit area and place field mappings within the text where you want them. An example usage is for building an email template, where the customer's name is a mappable data field.

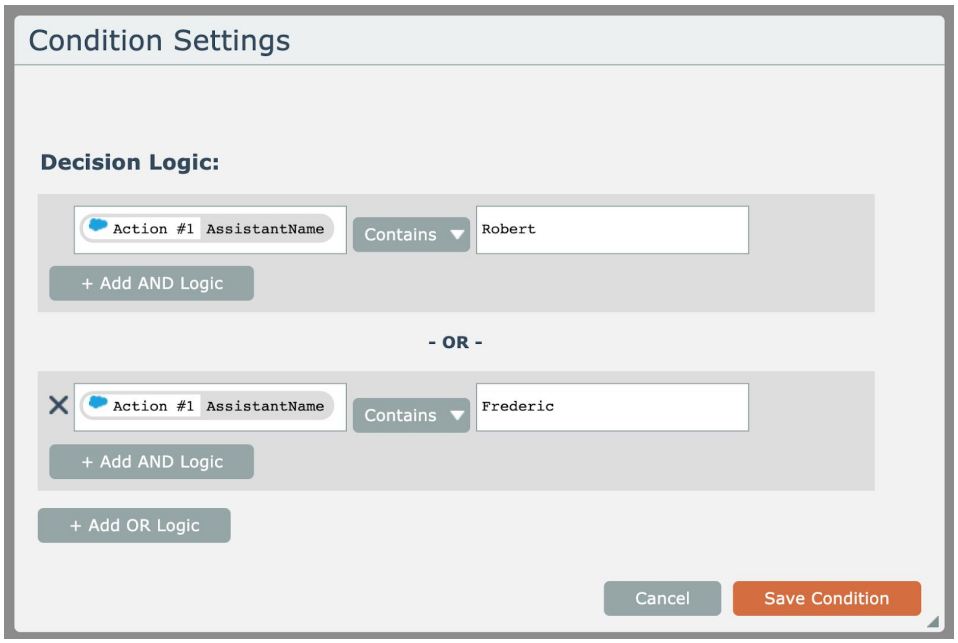
Configuring Conditional Branches

Conditional branches can be used to execute different action flows depending on configured logic:

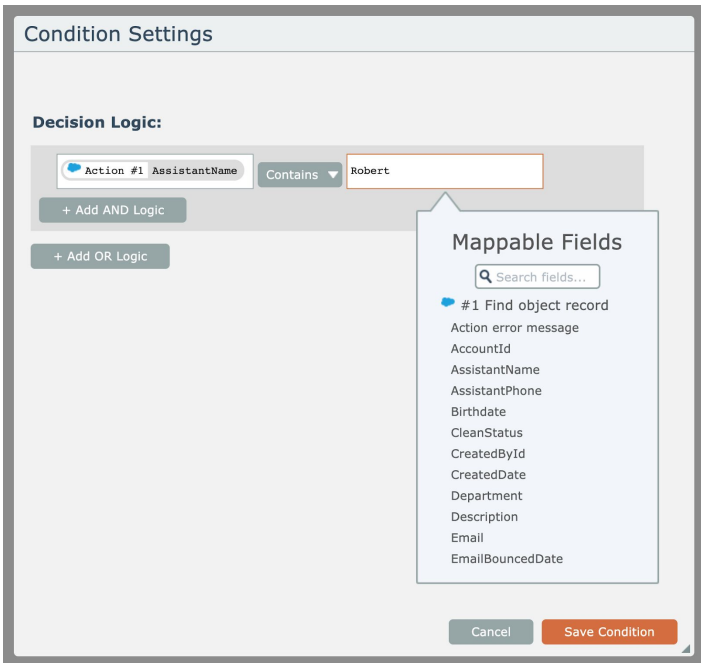


To add a conditional branch, click a "plus" icon on the right side and choose the **Conditional Branch** menu option:

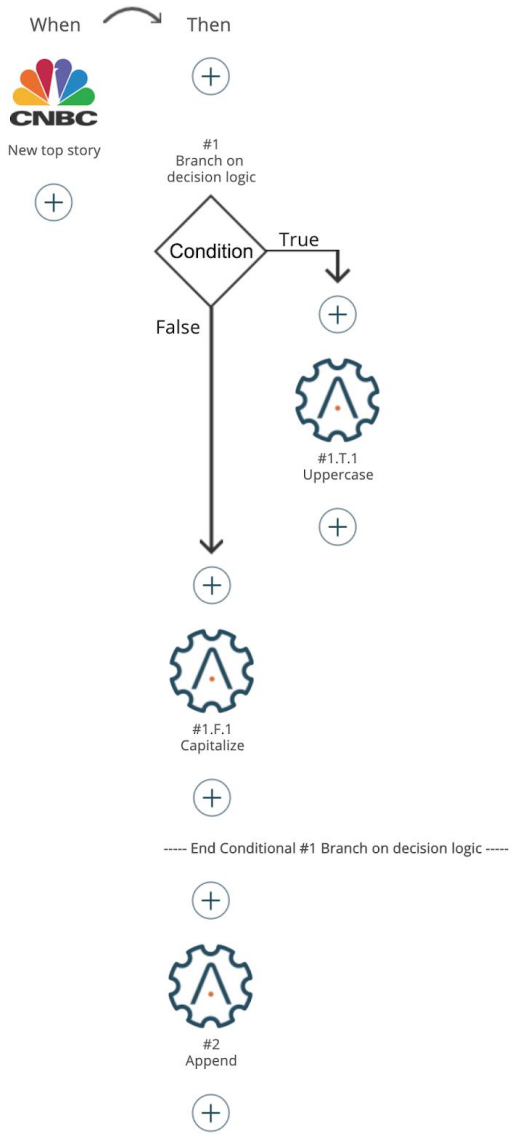
The condition can use multiple AND/OR logic tests:



Click in an edit field to insert trigger data fields or data fields emitted by actions prior to the condition.



Additional actions or conditions can be placed following a condition:

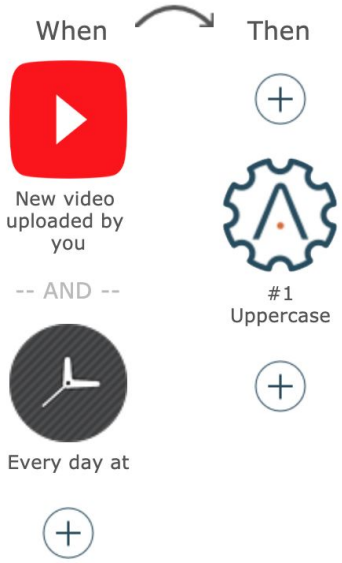


	Note: Conditions can be nested to an unlimited level, where other conditional branches are placed in the true/false branches.

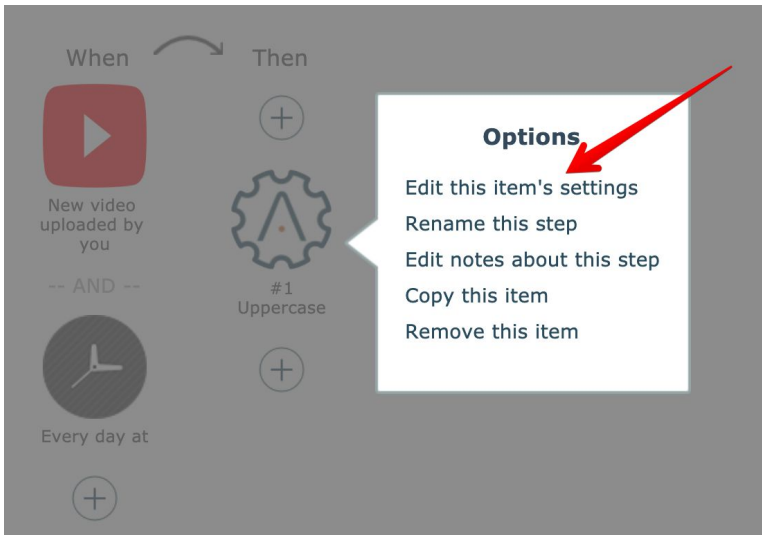
Follow the generated numbering to understand the flow. Action #1 is the entire conditional branch. Action #2 will always execute, regardless of which true/false branch is executed.

Editing Item Settings

Double-click existing triggers and actions in the automation editor to edit their settings:

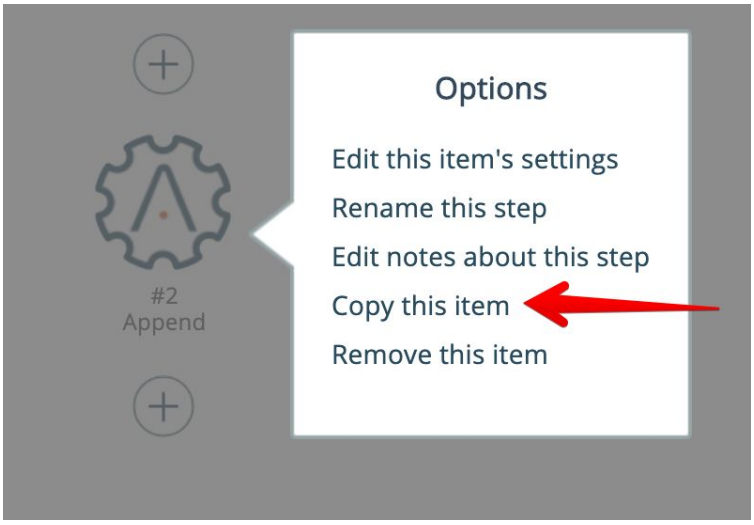


Alternatively, single click an item and choose its **Edit** menu option:

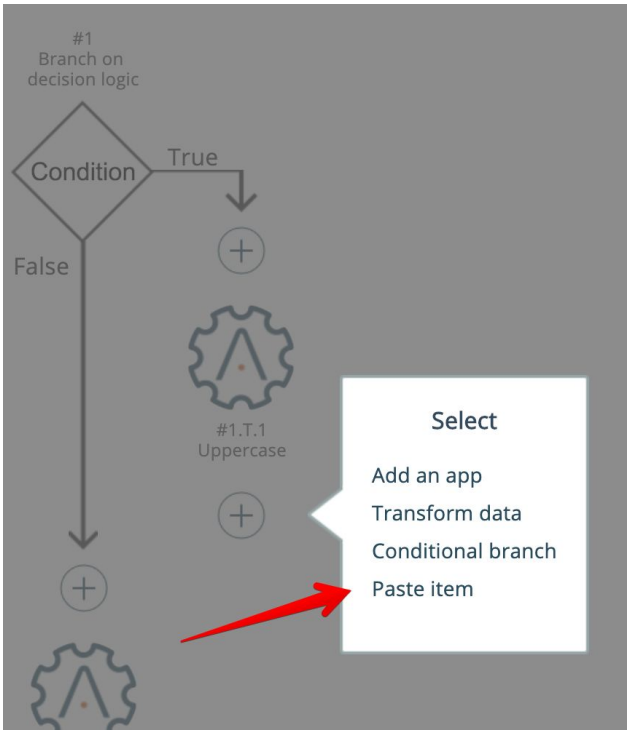


Copy/Paste Actions and Conditionals

Actions and conditional branches can be copied and pasted. To copy an action or conditional, click it and choose the **Copy** menu item:



Then click any action plus icon and choose the Paste menu item:

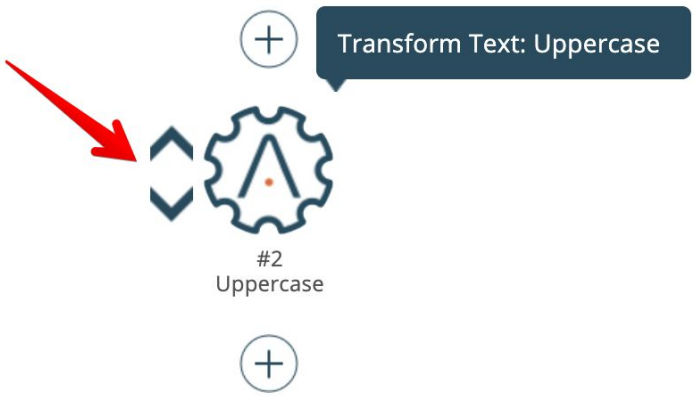


	Note: The editor will attempt to preserve field mappings when possible. Still, it is a good idea to review your field mappings for the items you have pasted.

	Note: Actions and conditions can also be pasted to other automations in the same browser session!

Repositioning Items

Mousing over items will cause them to show up/down arrows:



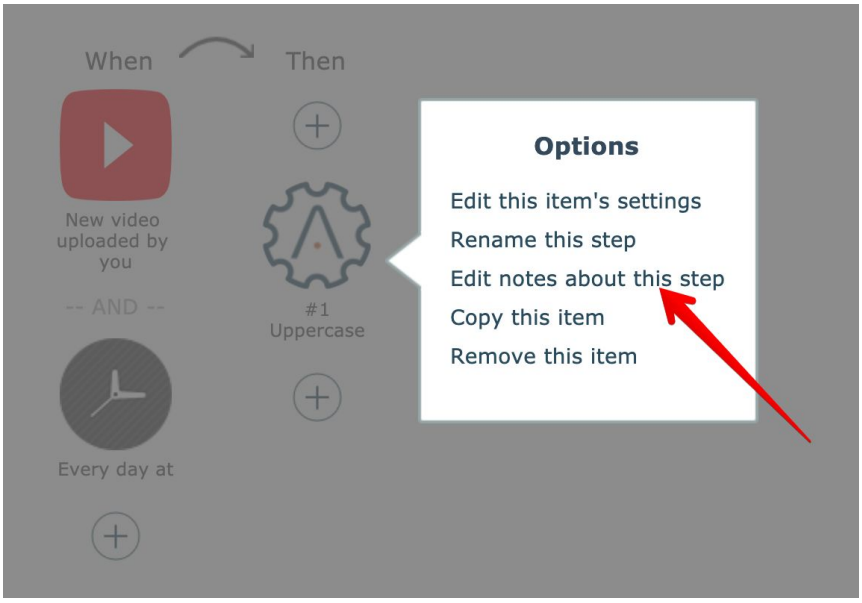
Click an arrow to move the item accordingly.

If the move target is a Conditional Branch, the editor will prompt you to choose a destination. You can choose to move the item to the end of either the true or false branch, or before or after the Conditional.

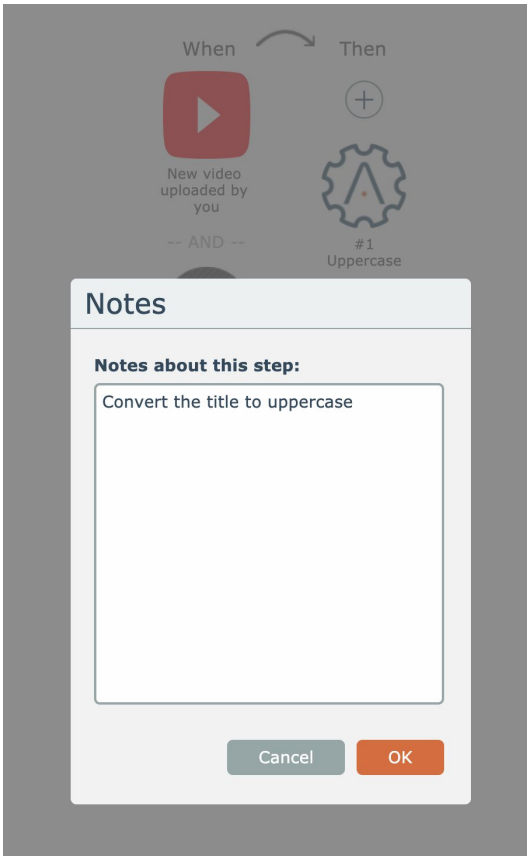
	Note: The editor will attempt to preserve field mappings when possible. Still, it is a good idea to review your field mappings for the items you have moved.

Editing Notes

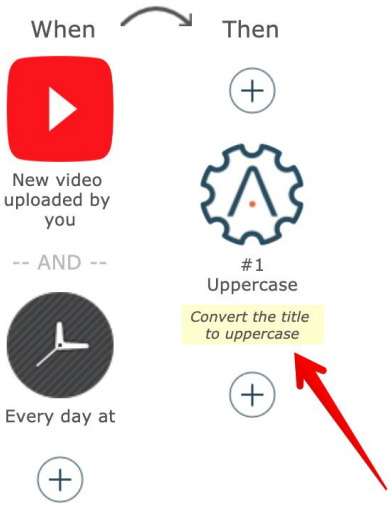
Click a trigger or an action and select the **Edit Notes About This Step** option to document the steps in your automation as may be needed:



A dialog will appear for editing the notes about the step:

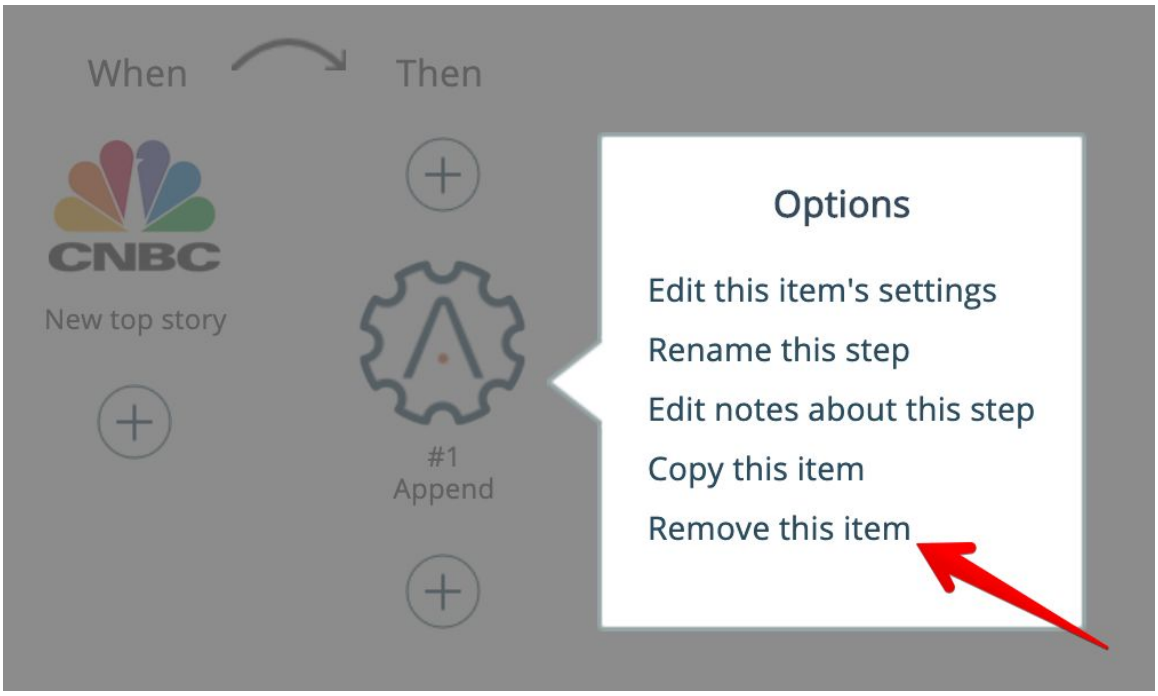


Your notes will appear underneath the item:



Removing items

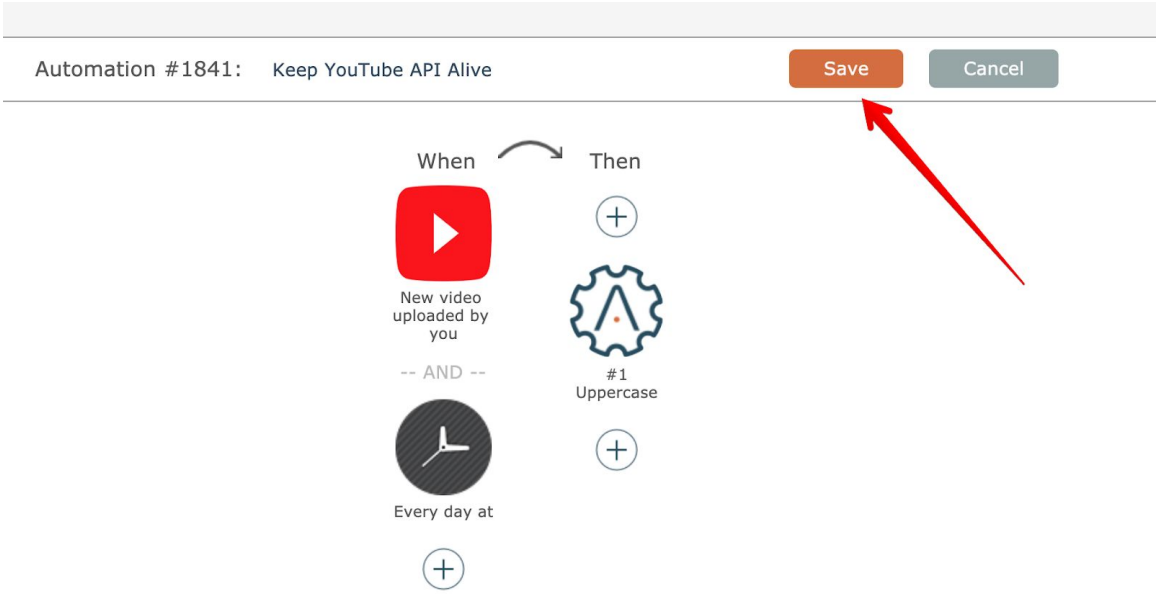
To remove an item from the automation, click it and select the **Remove** menu item:



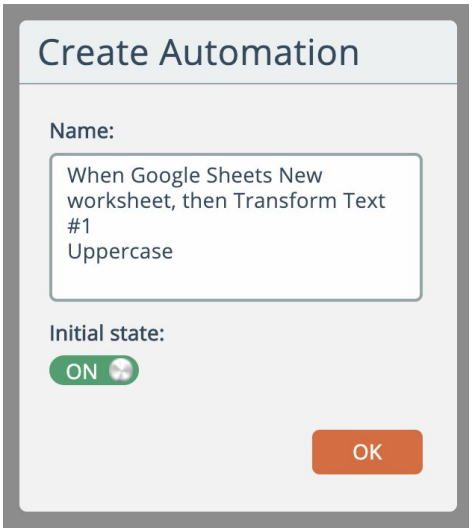
	Note: The editor will also remove any field mappings that use the item's output.

Saving

Click the Save button to save your automation:

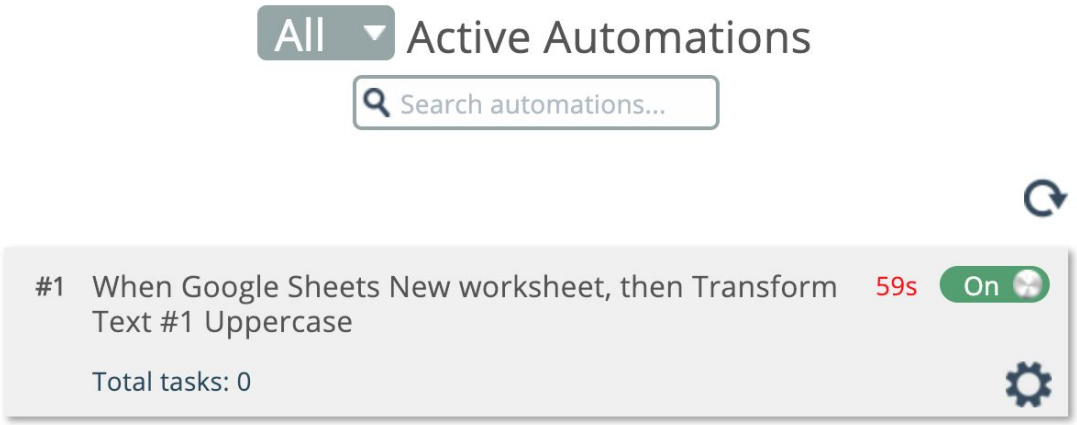


When saving a new automation, if you have not yet entered a name for it the system will automatically generate one:



You can also choose whether to have the newly created automation be initially turned on when saved.

The new automation will appear in your dashboard:



Chapter 3: Automation Types

Supported Automation Types

The Automation Editor supports building these types of automations:

- Polling
- Instant
- Two-way sync
- Export

The following sections describe each of these types of automations and how they are built and executed.

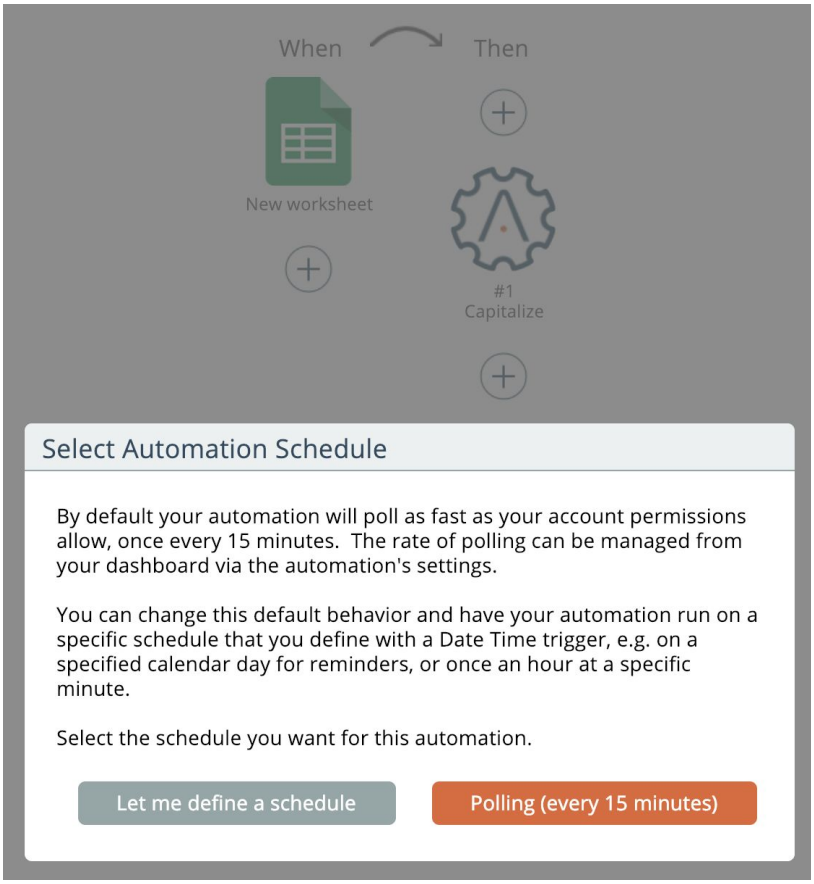
Polling Automations

The most common automations are those that have polling triggers. Polling triggers are identifiable by their names not starting with the word “Export” and by their names not ending with “(instant)”.

Polling automations are periodically executed based on a schedule that can be flexibly defined. The default schedule is every 15 minutes.

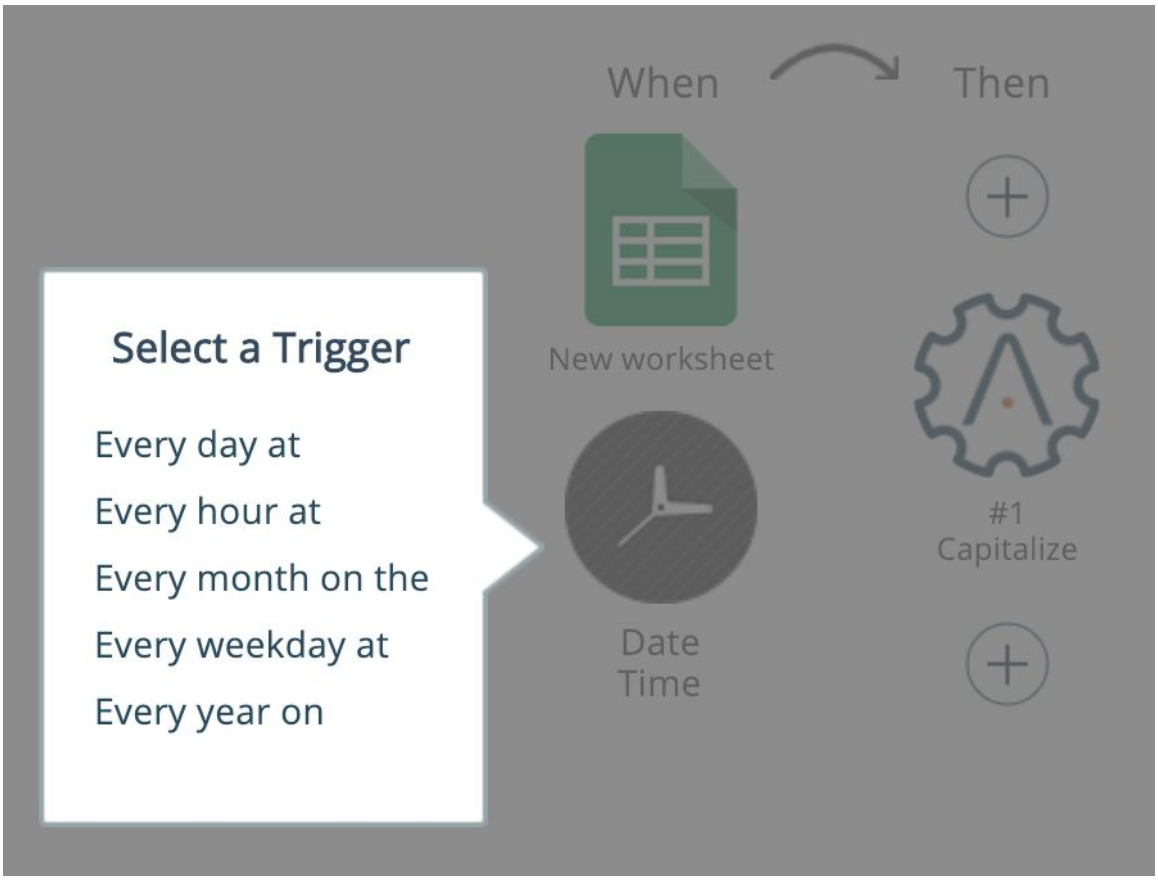
Each time the system executes a polling automation based on its schedule, the triggers will determine what data needs to be processed. Then the actions in the automation are executed for any data rows emitted by the triggers.

When saving a new polling automation, the following prompt appears to choose how to schedule the automation:



The default “Polling” option will schedule the automation to execute as fast as your account permissions allow. The default is every 15 minutes.

The polling schedule can be refined from the automation’s gear icon in the dashboard.Choosing the other option to define a schedule yourself will cause the Date Time app to be added to the automation:



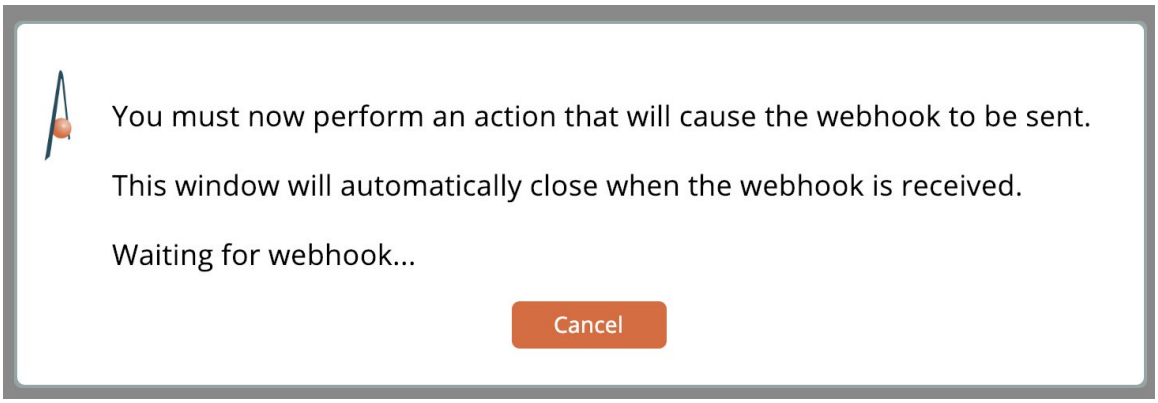
A Date Time trigger can be selected to run the automation at the defined schedule.

Instant Automations

Unlike polling automations, instant automations respond to data immediately. Instant triggers are identifiable by their names ending with "(instant)".

Whether or not instant triggers are available for an app usually depends on if the app supports sending data immediately.

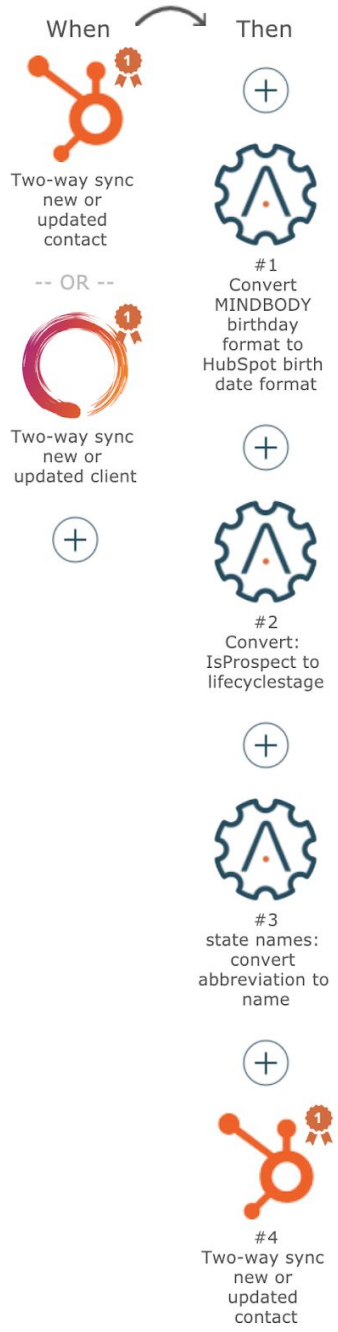
When configuring some instant triggers, you may have to go to the app and perform an action that will cause data to be sent. The automation editor will inform you what to do and wait for data to be received:



Instant automations have no schedule. If an instant automation is turned on, it will process data immediately as it is received.

Two-way Sync Automations

Two-way sync automations allow the bidirectional syncing of data between two apps. Here is a partial example:

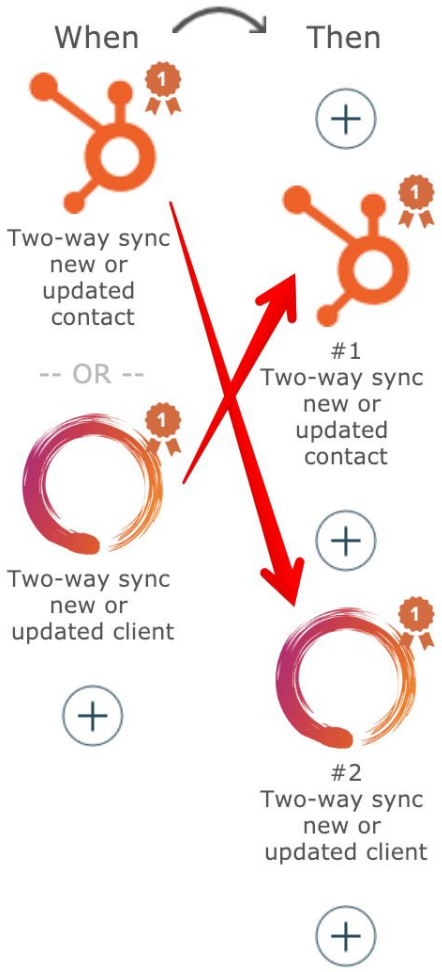


(There are more actions than shown in the screenshot.)

The two-way sync automation in the screenshot above mirrors contacts in HubSpot with clients in MINDBODY. Whenever records are added or updated in one system, the changes are mirrored to the other system.

Triggers and actions having names starting with "two-way sync" are those that can mirror data back and forth.

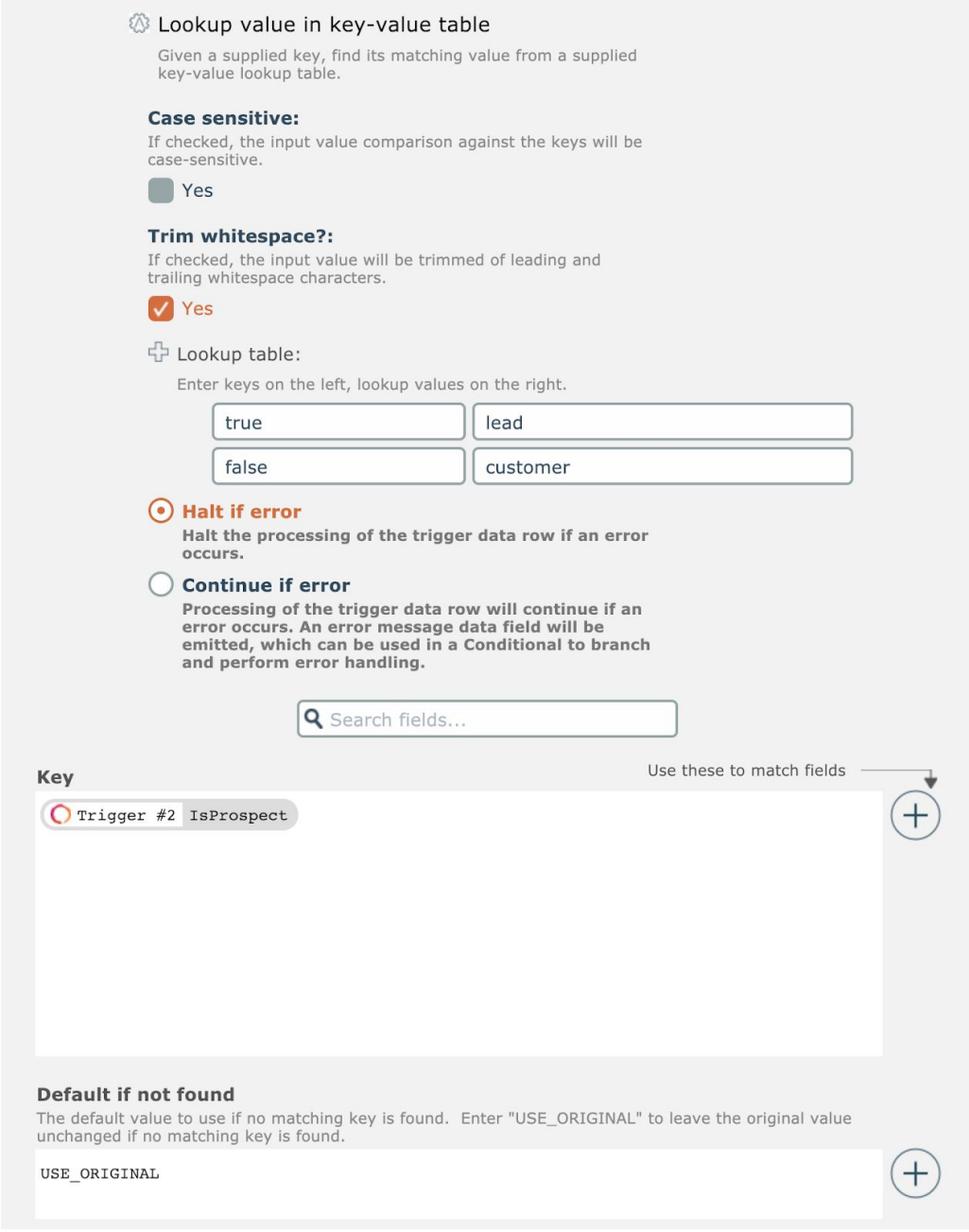
Conceptually a two-way sync automation sends data from one app to the other app like so:



Action field mappings are criss-crossed. The action for app A uses data from app B.

In practice two-way sync automations are never as simple as this, because data usually has to be translated between the two apps.

A common technique is to use the Transform Text “lookup value in key-value table” action to map values in one system to the other system, like so:

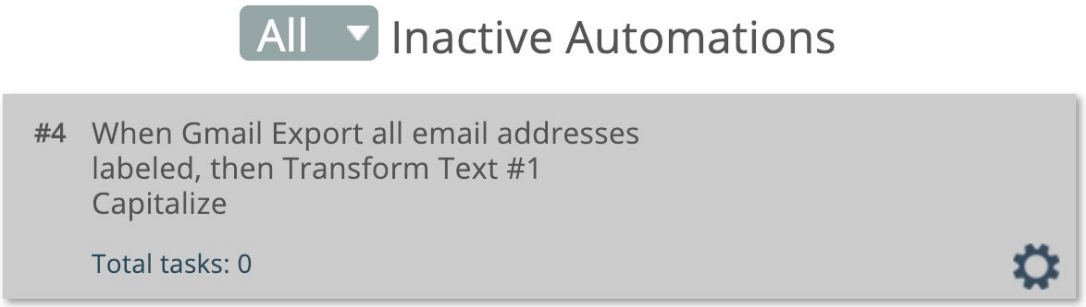


Here, a value of “true” in app A for its “isProspect” field is translated to “lead” for app B, and a value of “false” in app A is translated to “customer” for app B.

Export Automations

Export automations are generally only used for one-time migrations of historical data from app to app. Export triggers are identifiable by their names starting with "Export".

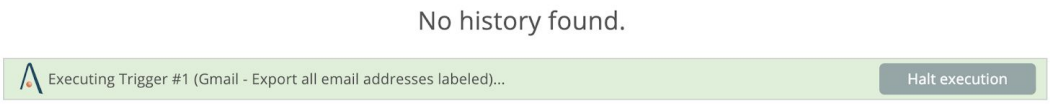
Export automations can never be turned on. They can only be executed manually via the gear icon.



Export automations will not time out when executed. They are allowed to run to completion.

	Warning! Export automations currently perform all data processing in-memory. Processing too much data can cause the server to exhaust its memory.

Export automations can be manually halted from the automation's History screen:

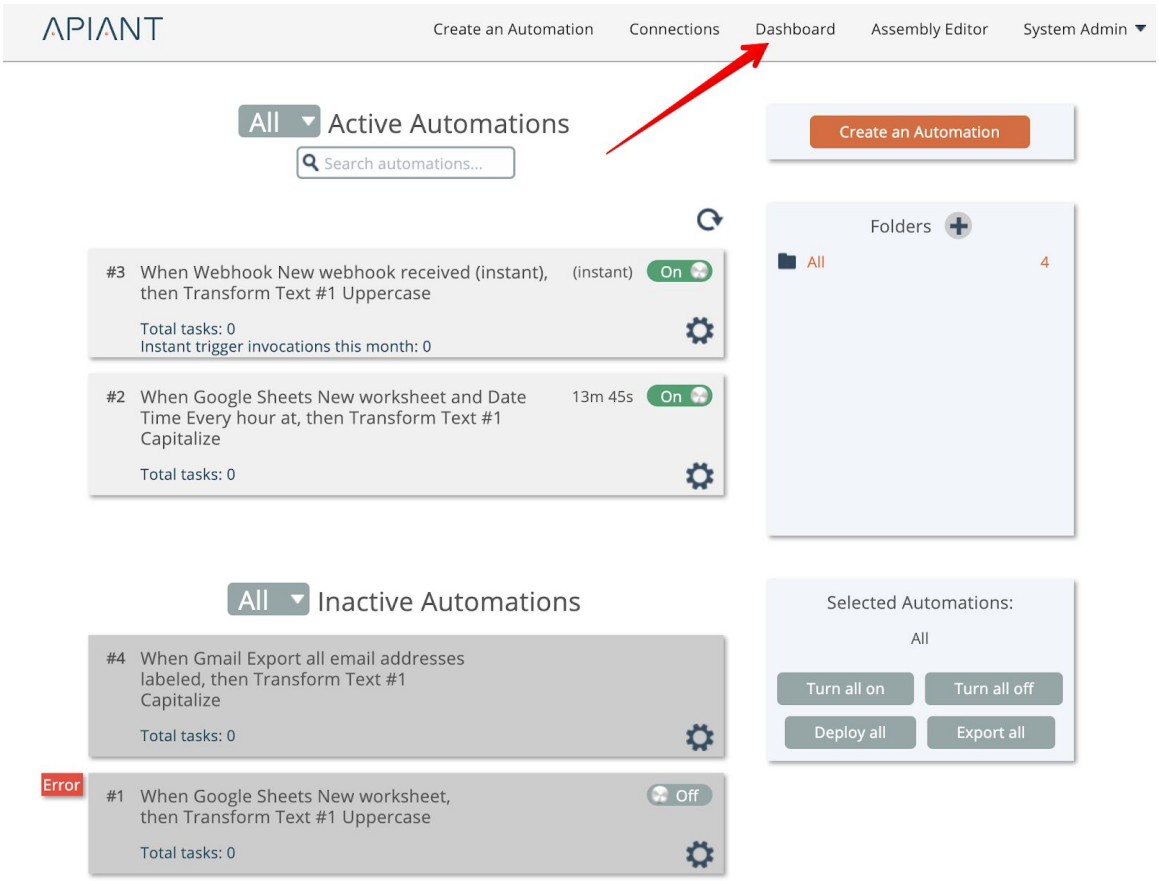


Click the **Halt Execution** button to stop the automation.

Chapter 4: Dashboard Functionality

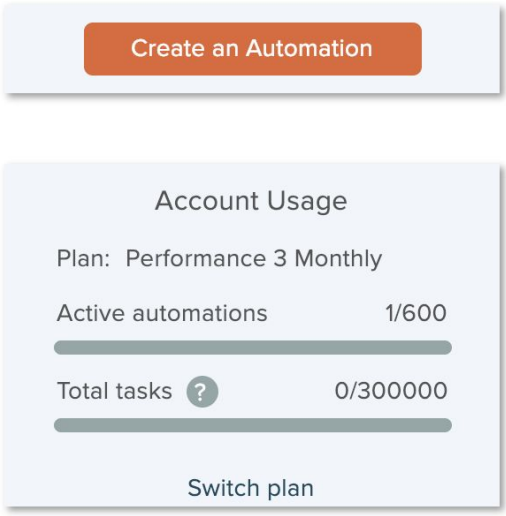
Dashboard Functionality

The dashboard is accessed via the menu link at the top right:



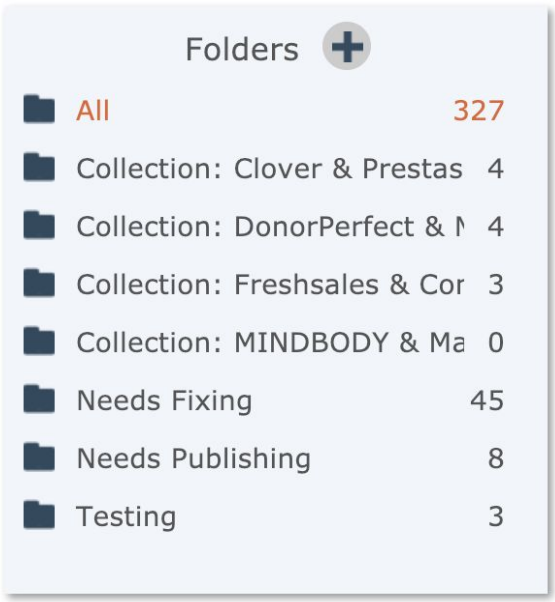
The dashboard is divided between active automations and inactive automations.

Depending on the system configuration, you may also see usage information for your account:

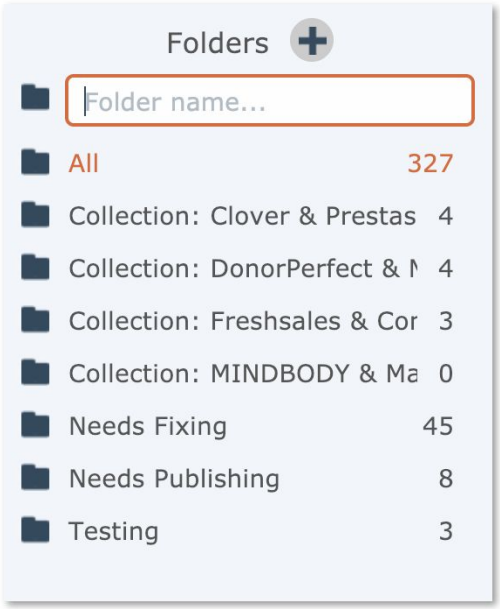


The system can be configured with limits on the number of active automations or the total number of tasks that can be processed each month.

Automations can be grouped into folders:

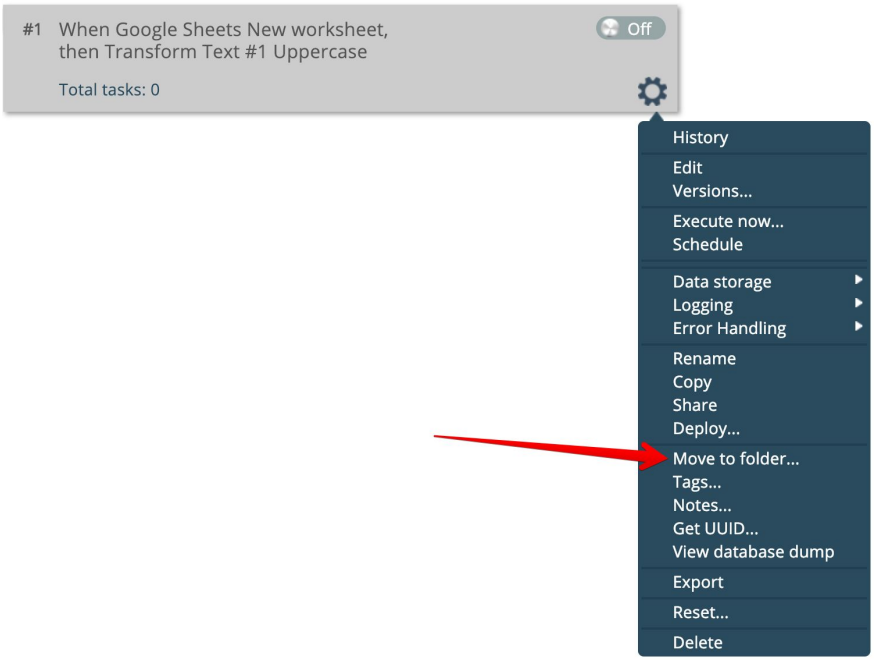


Click the “plus” icon to create a new folder:

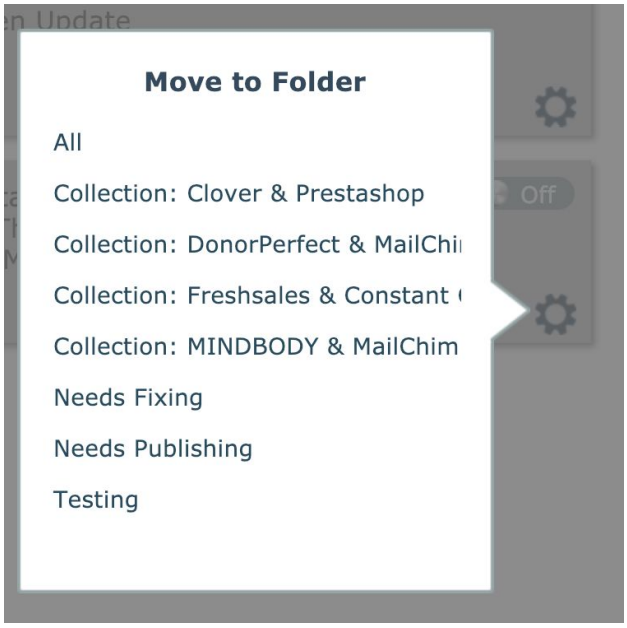


When new automations are saved they can be placed into an existing folder.

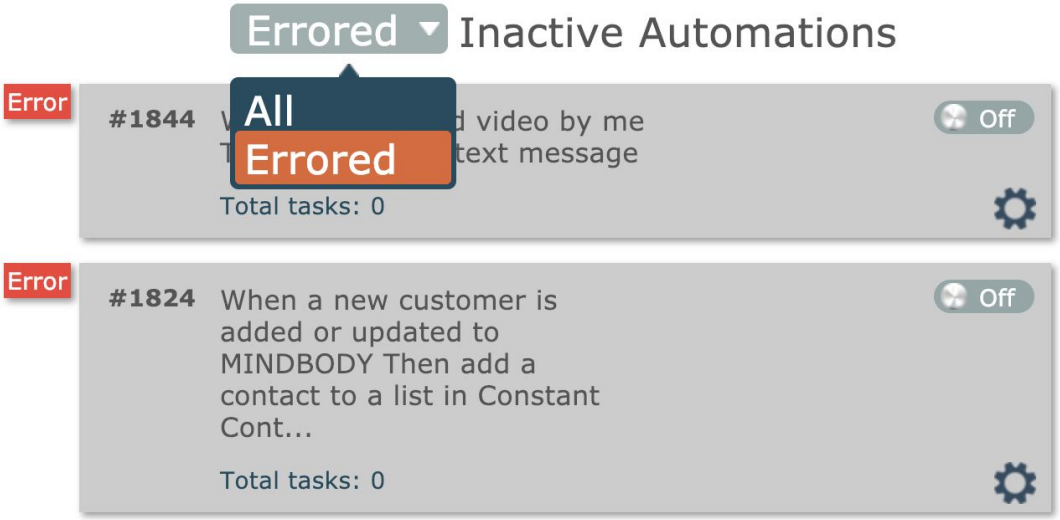
Existing automations can be moved to a folder via the gear icon menu:



Select the destination folder:

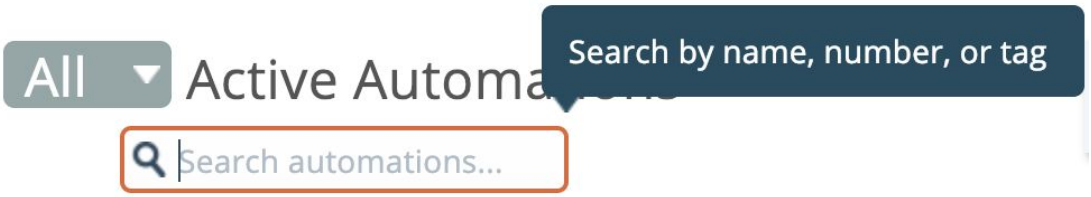


You can quickly find automations that had an error the last time they executed via the dropdown menu:

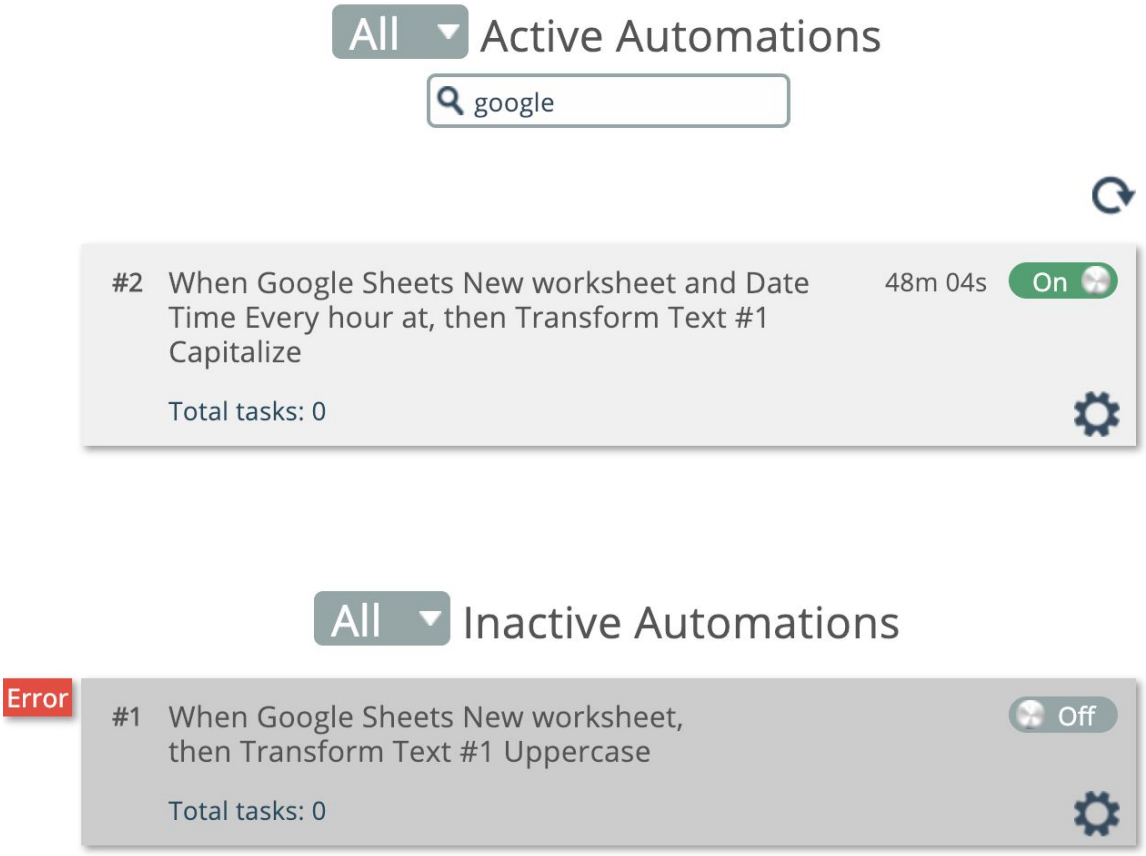


Only automations that had an error the last time they were executed will be shown.

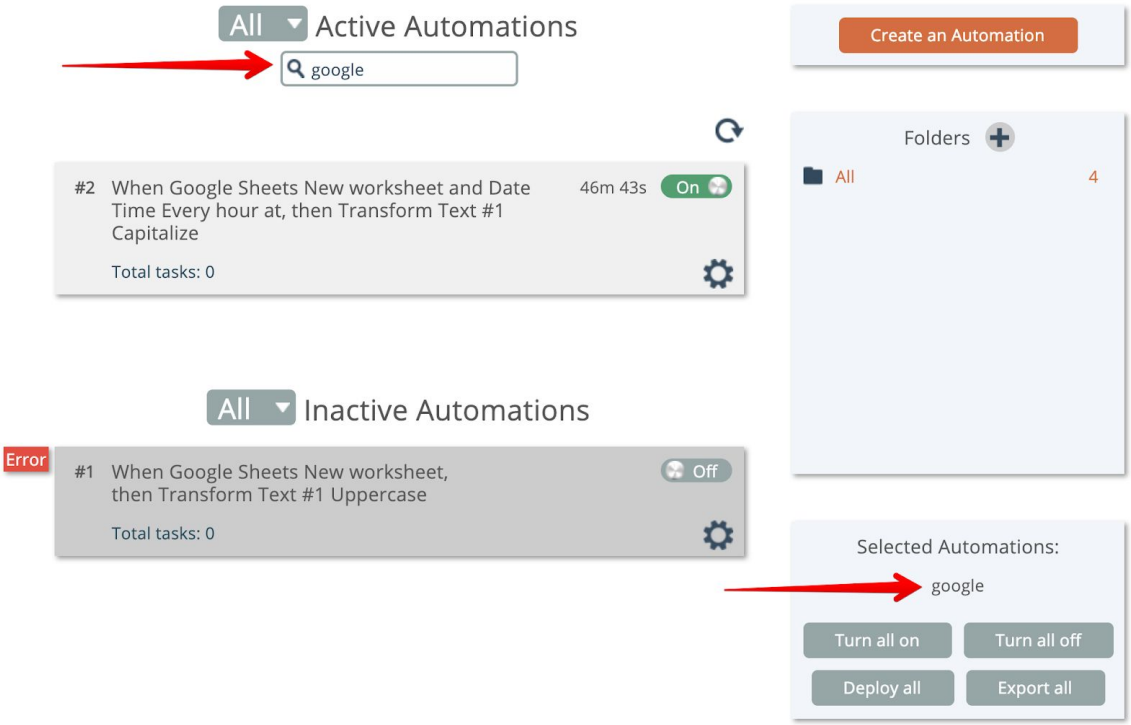
Automations can be searched for by name, number, or tag:



Only matching automations are displayed:



When you enter a search, the automations become selected:



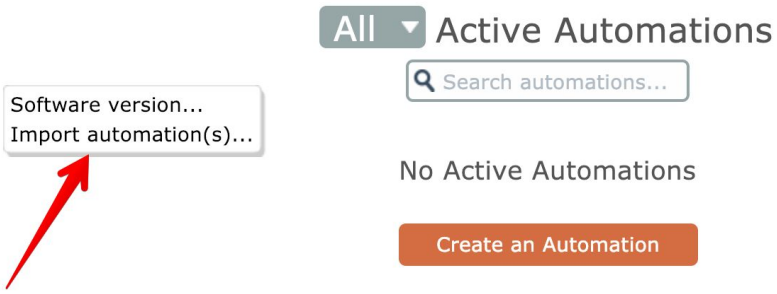
The buttons in the selection area operate upon all selected automations.

All selected automations can be turned on or off at once.

If your account has the "Deploy Automations" permission, the **Deploy All** button can be used to deploy the selected automations to other accounts in the system.

If your account has the "Export" permission, the **Export All** button can be used to export the selected automations to your local machine as a file.

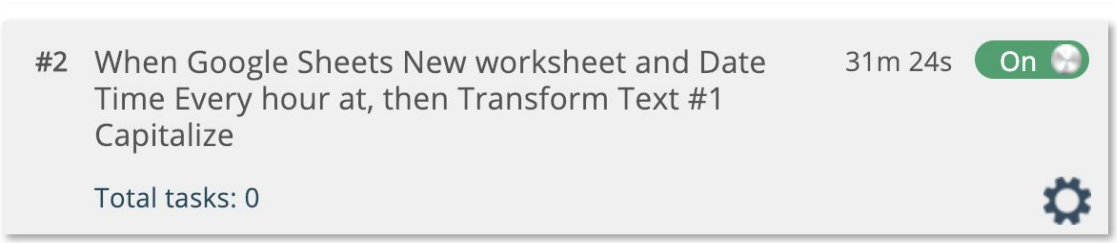
The exported automations can then be imported into another APIANT system by right-clicking on the background of the dashboard:



Automation Tiles

Automation tiles display varying information depending on the type of automation.

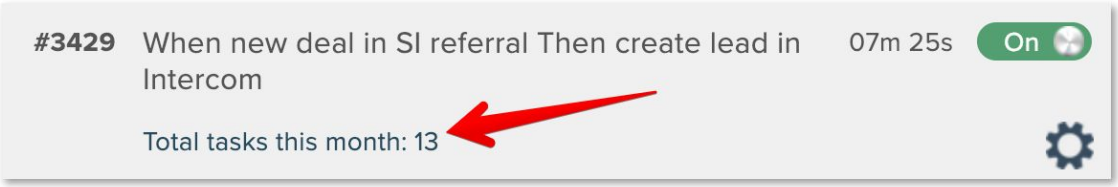
Polling automations display a countdown timer for the next time the automation will be evaluated for execution:



	Note: When the countdown timer goes to zero, the automation is only evaluated to see if it should be executed or not. Schedule windows can be defined to restrict polling automations to being run only during certain times of certain days, e.g. 8am-5pm M-F. See the documentation for the gear icon that follows to learn how to define a schedule window.

The "total tasks" value shows the total number of tasks processed by the automation since it was created.

If your system is configured to limit tasks per month, then the total tasks for the month-to-date is displayed instead:



A task is a trigger data row successfully processed by an action. If an automation has multiple actions, the trigger data row is counted once per successful action.

Webhook automations have no countdown timer and show "(instant)" instead:

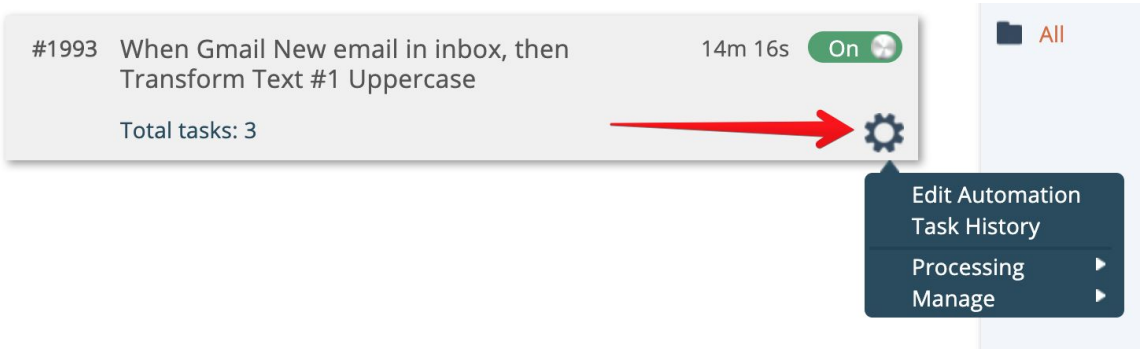
Webhook automations also display how many times they have been invoked month-to-date.

Export automations have no on/off switch and are always inactive:

Export automations can only be run manually.

Gear Icon Menu

The automation gear icon access functionality for operating and managing automations:



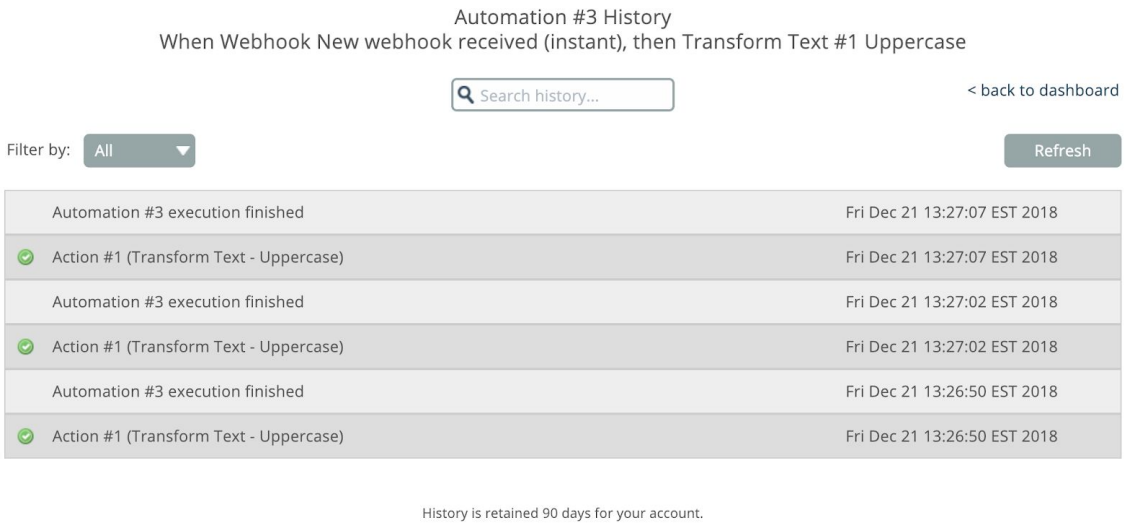
	Note: The available menu options within submenus will vary depending on the type of automation and your account permissions.

Edit Automation

The gear icon menu's **Edit Automation** top-level menu option edits the automation in the automation builder.

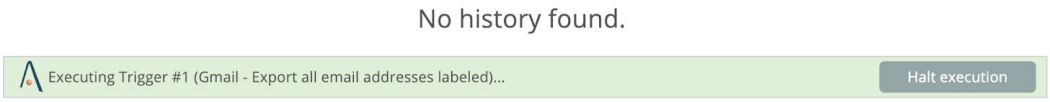
Task History

The gear icon menu's **Task History** top-level menu option opens the automation's history screen:



The history screen shows transactions that were either filtered, successfully processed, or errored.

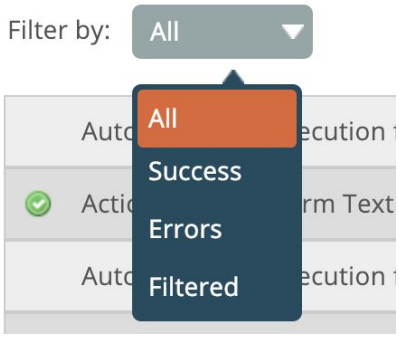
The screen will display a message if the automation is currently executing while you have its history screen open:



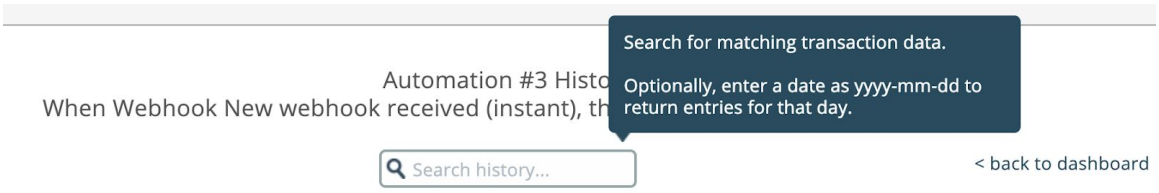
The **Halt Execution** button can be used to stop the automation's processing.

Transaction logs are only stored in the system for a system-configured period of time. The bottom of the screen shows how long history is retained for your account.

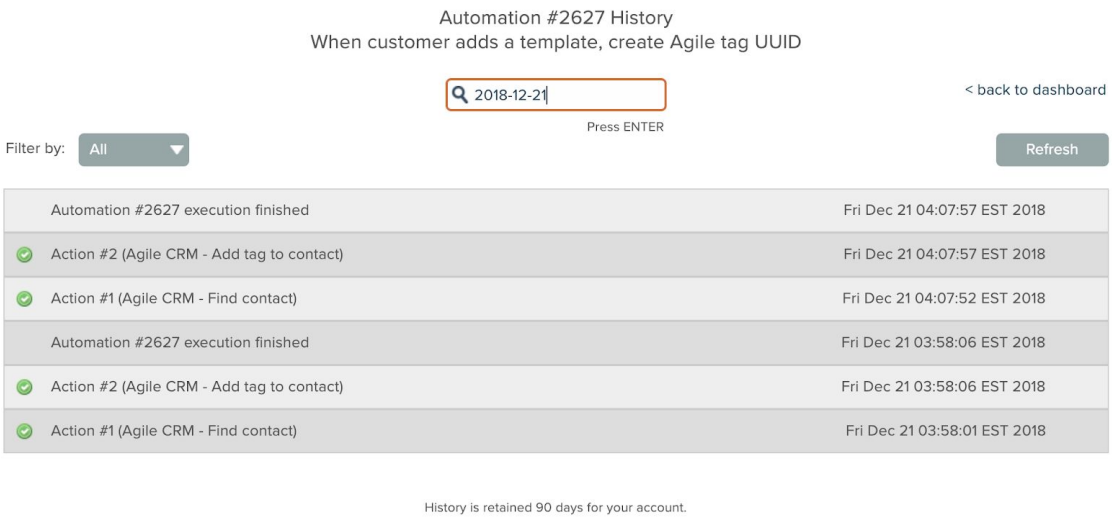
The filter dropdown lets you filter transactions by their status:



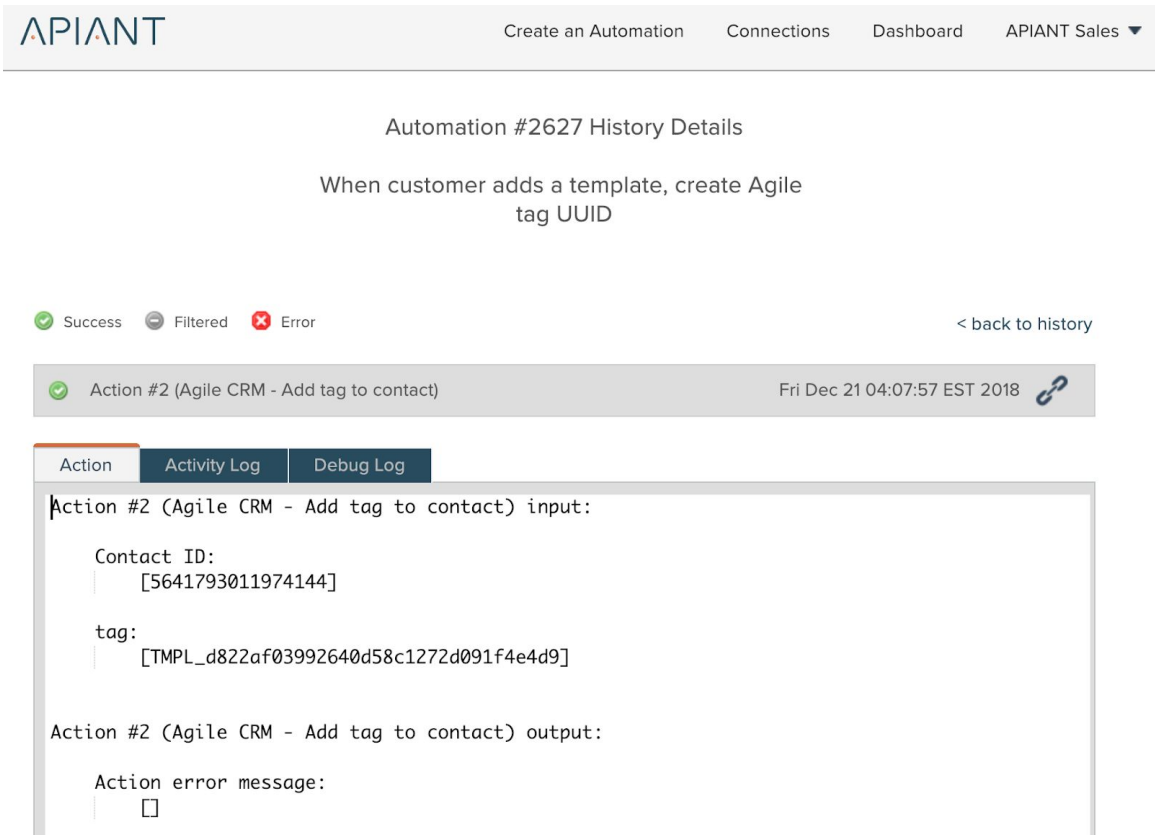
You can also search for transactions by either entering a query or by entering a specific date:



Transactions matching your search will be returned:

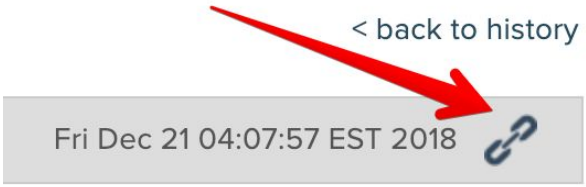


Transactions in the history screen can be clicked to access details:



The Debug Log tab is only available if your account has the "Automation Debug Logs" permission.

The link icon at the top right can be clicked to obtain a URL to the current screen:

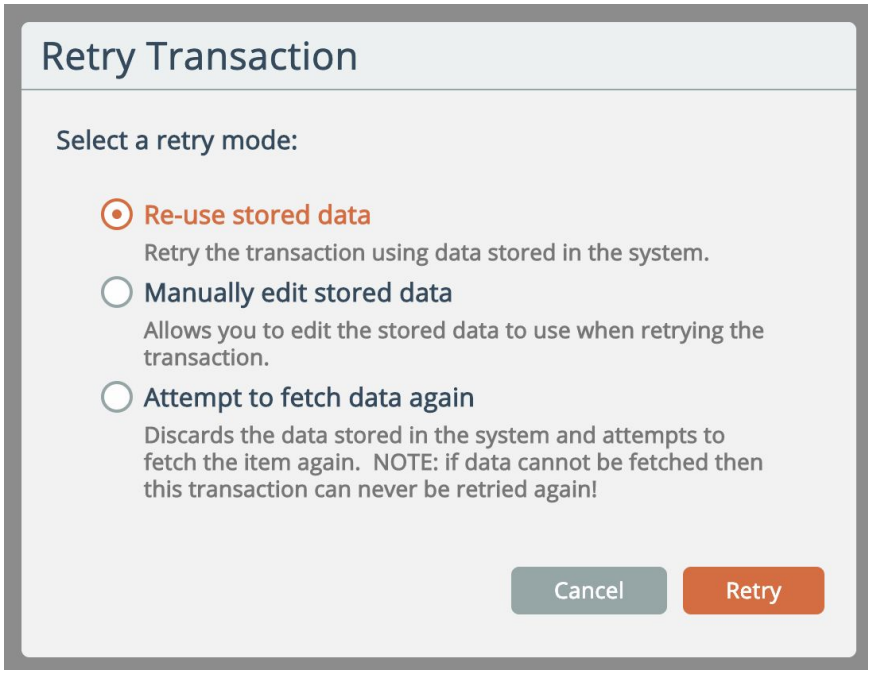


You can send the link to support personnel to get help troubleshooting issues.

Retrying Failed Transactions

Transactions that fail to process will have a retry button next to them, if the system is able to retry them:

Clicking the Retry button will open a dialog with options for the retry:



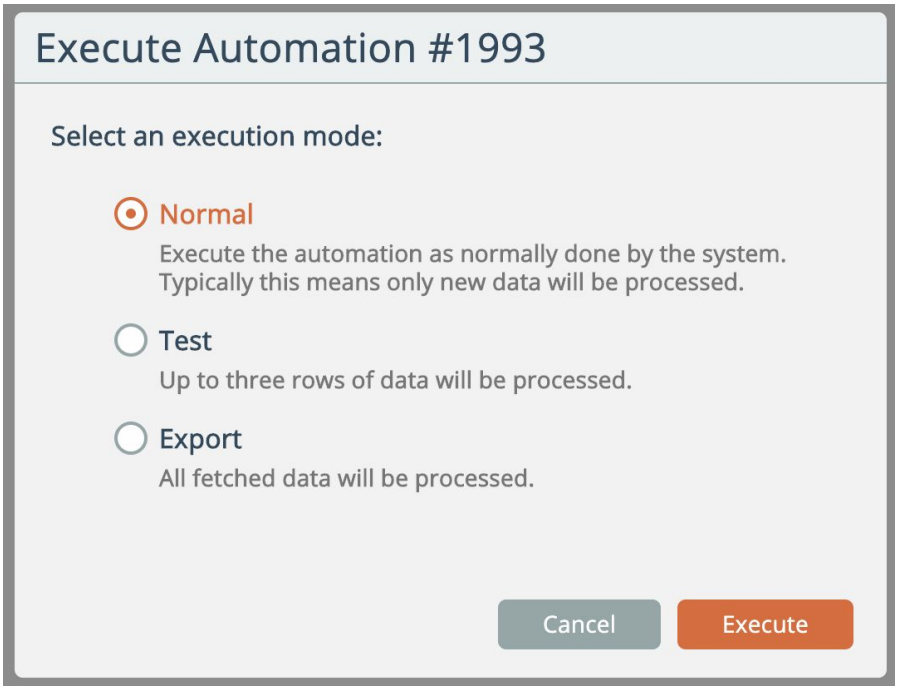
The first option will re-use the transaction data stored in the system as-is.

The second option lets you edit the transaction data before retrying. This can be used to correct errant data.

The third option will discard the transaction data in the system and attempt to fetch the data again. This option is only available for polling automations and not for webhooks (instant triggers).

Processing -> Execute Now

The gear icon menu's **Processing -> Execute Now** option lets you manually execute the automation immediately.

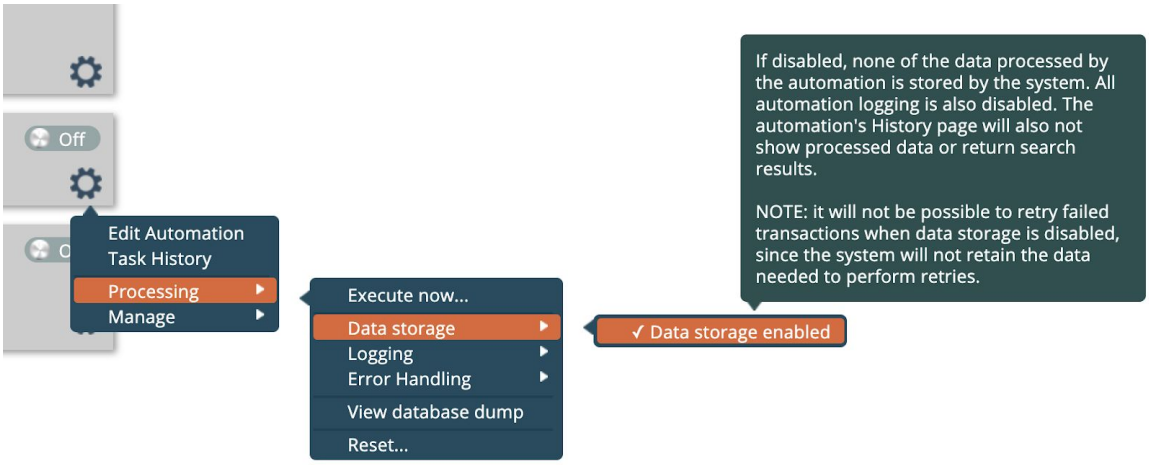


Select one of the available options and click the Execute button to run the automation immediately.

	Note: This menu option is not available for webhook automations.

Processing -> Data Storage

The gear icon menu's **Processing -> Data Storage** option can be used to disable all transactional data storage:

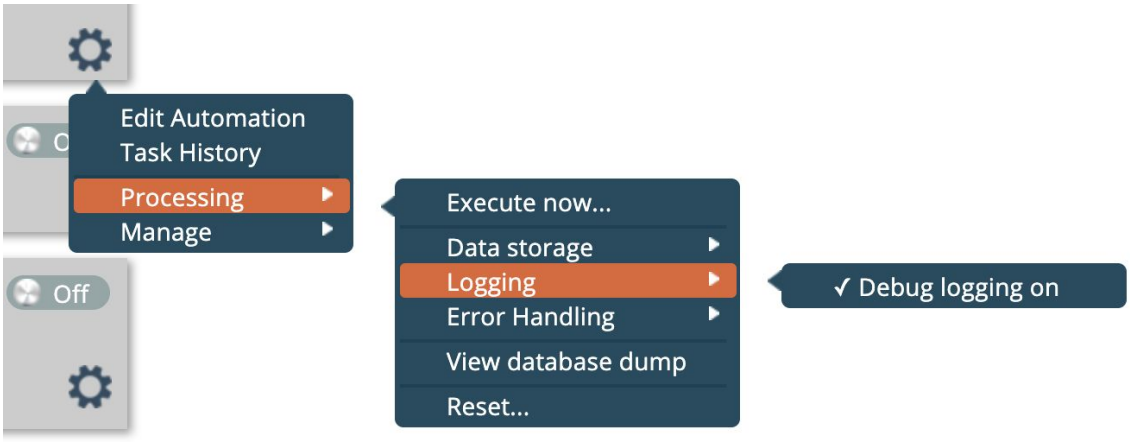


This option is intended for automations that process sensitive data, such that no transaction history or logs are stored.

	Warning! When data storage is disabled the automation's History screen will not show processed data, making it impossible to retry failed transactions or to utilize logs for troubleshooting errors.

Processing -> Logging

The gear icon menu's **Processing -> Logging** option can be used to enable or disable debug logging:

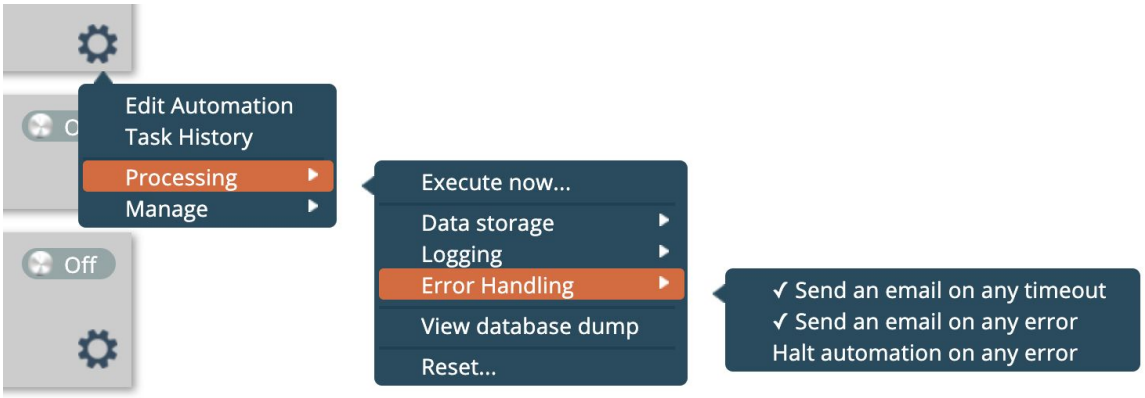


Turning debug logging off significantly reduces the size of the system's log storage. Turning off debug logging also improves automation execution performance.

	Note: This menu option does not appear when Data Storage is disabled, since no logs are generated.

Processing -> Error Handling

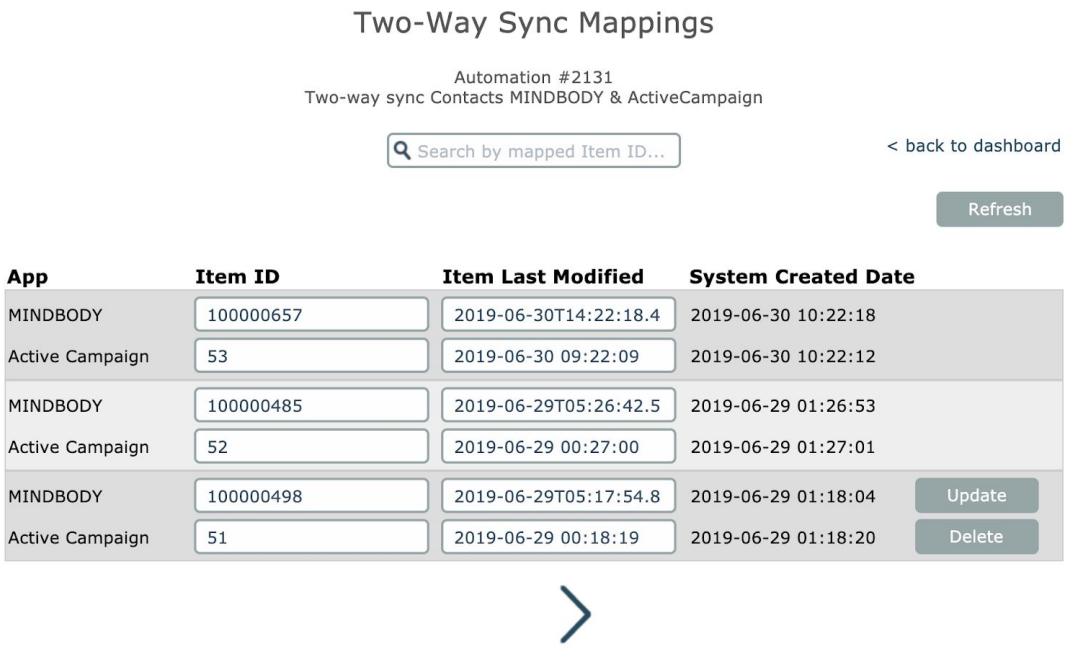
The gear icon menu's **Processing -> Error Handling** option controls what happens when an automation encounters an error during processing:



You can choose to receive email alerts upon any timeout or error. You can also choose to halt the automation if it encounters any error during processing.

Processing -> Two-way Sync Mappings

The gear icon menu's **Processing -> Two-way Sync Mappings** option opens a screen for managing a two-way sync automation's mapping data:



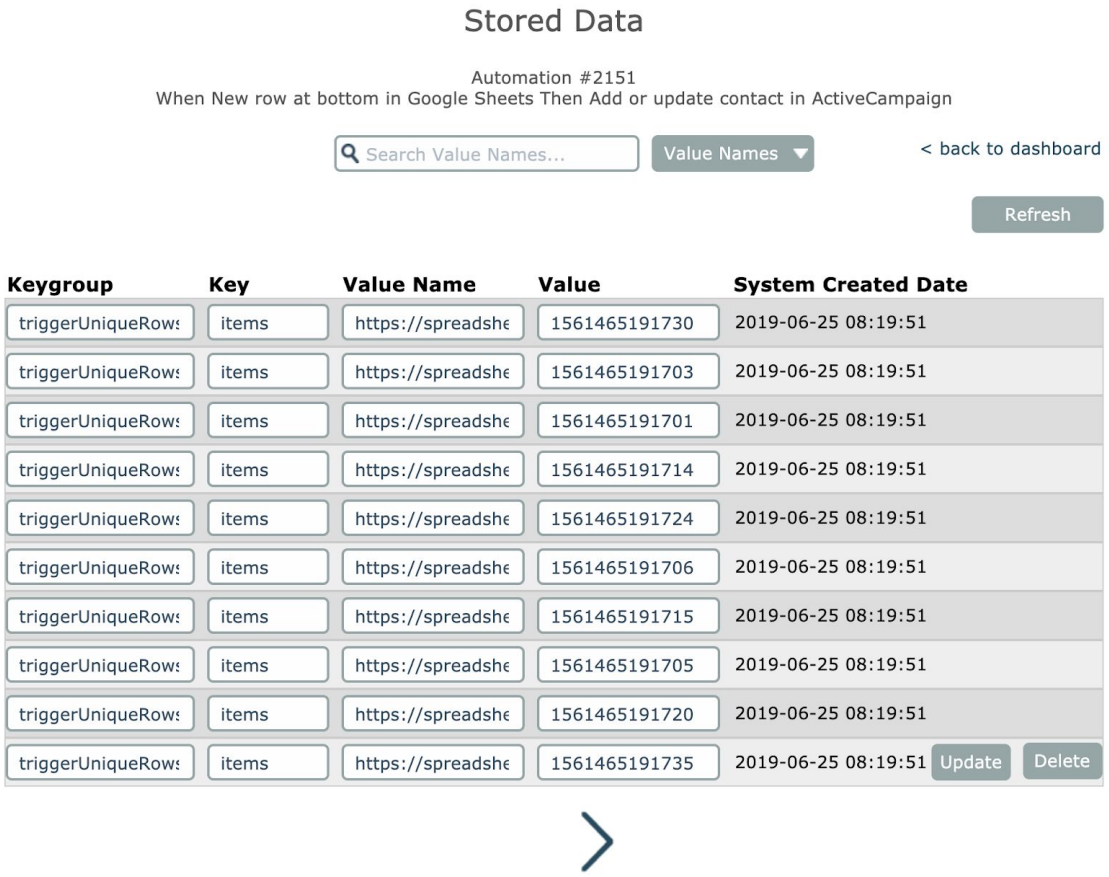
The search field at the top can be used to find specific mapped item ids.

Existing entries can be modified and updated, or mappings can be deleted.

	**Note:** This menu option is only available if your account has the "Assembly Developer" or "Switch Account" permission and if the automation contains a two-way sync trigger.

Processing -> Manage Stored Data

The gear icon menu's **Processing -> Manage Stored Data** option opens a screen for managing a polling automation's stored data:



Polling automations at a minimum typically store item ids within the Value Name column that represent processed data rows.

The search field at the top can be used to find specific data with each column. The most common search is defaulted, which is to find a specific processed item id with the Value Name column.

Existing entries can be modified and updated, or can be deleted.

	Note: This menu option is only available if your account has the "Assembly Developer" or "Switch Account" permission and if the automation contains a polling trigger.

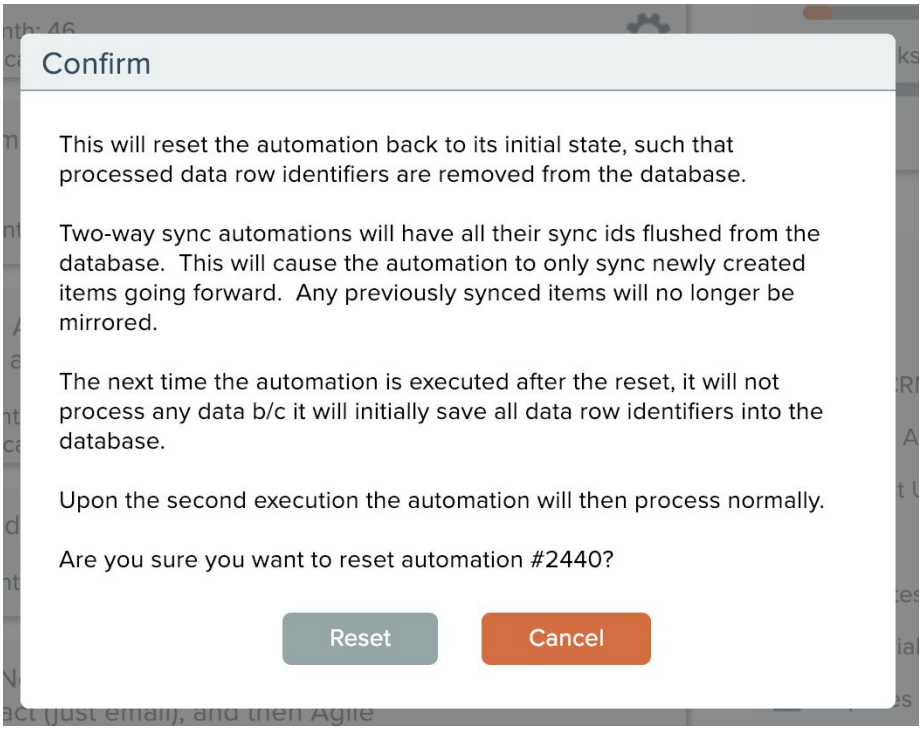
Processing -> View Database Dump

The gear icon menu's **Processing -> View Database Dump** option opens a new browser window containing all of the automation's stored data.

	**Note:** This menu option is only available if your account has the "Assembly Developer" or "Switch Account" permission.

Processing -> Reset

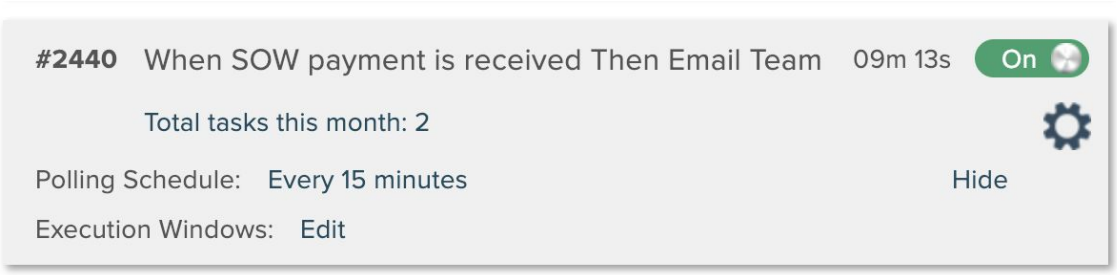
The gear icon menu's **Processing -> Reset** option only appears for polling automations. It can be used to flush data row identifiers and two-way sync mappings from the database:



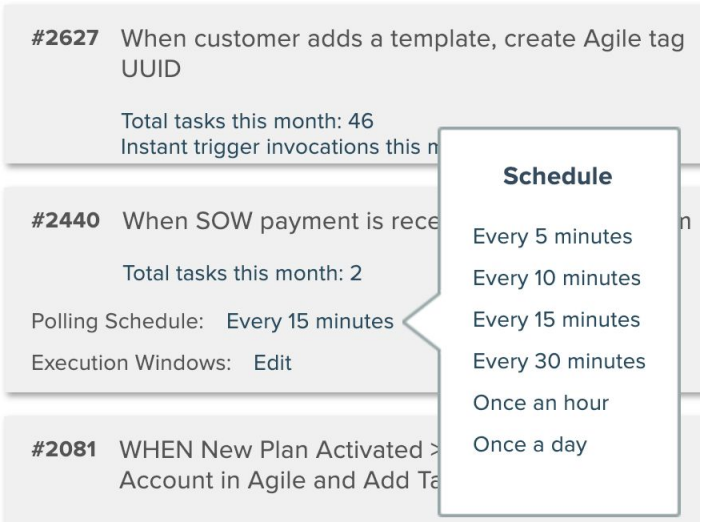
After being reset, the automation won't begin to process data again until after it is executed one time:

Manage -> Edit Polling Schedule

The gear icon menu's **Manage -> Edit Polling Schedule** option is only available for polling automations. Select it to view schedule information:



The polling schedule can be modified by clicking its link:

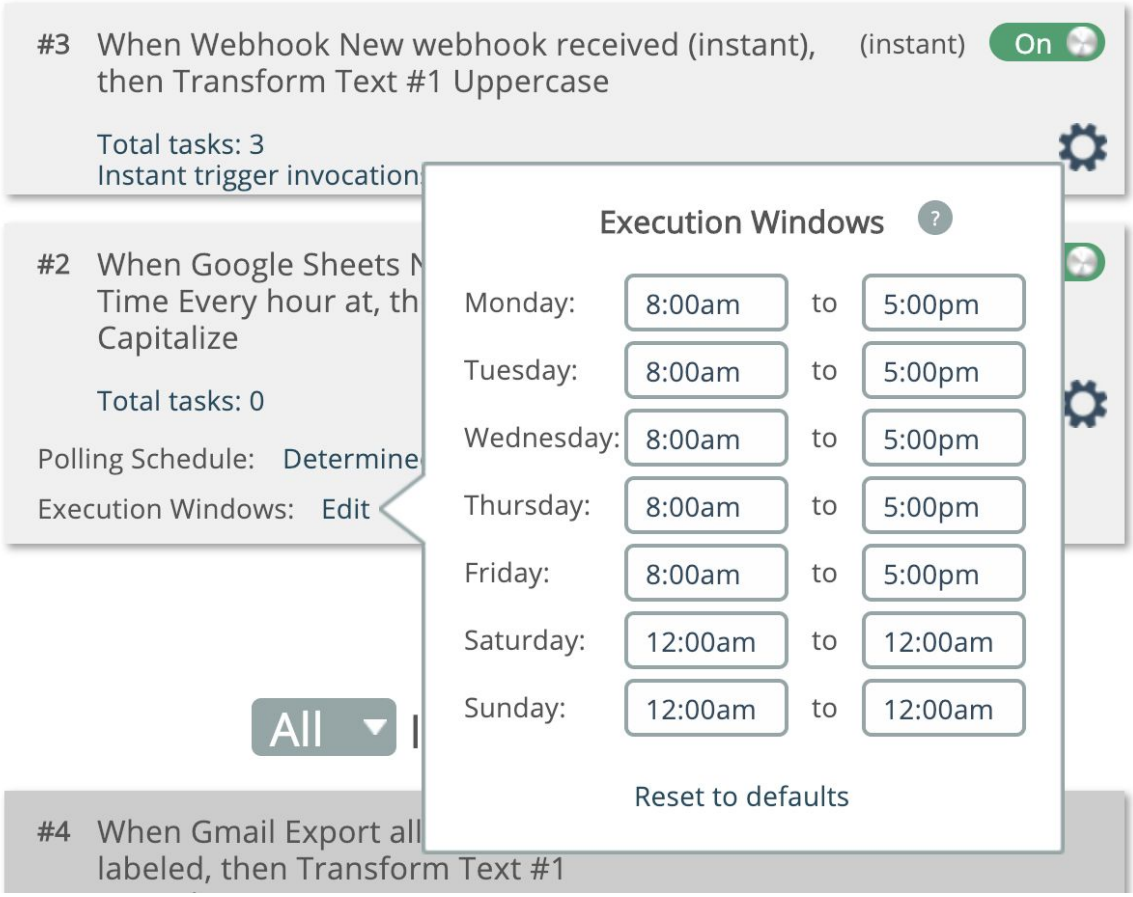


If the polling automation uses a Date Time trigger to schedule execution, the Polling Schedule cannot be modified:


#2 When Google Sheets New worksheet and Date Time Every hour at, then Transform Text #1 Capitalize
35m 03s
On
Total tasks: 0
Polling Schedule: Determined by the automation's Date/Time Trigger Hide
Execution Windows: Edit

Execution Windows

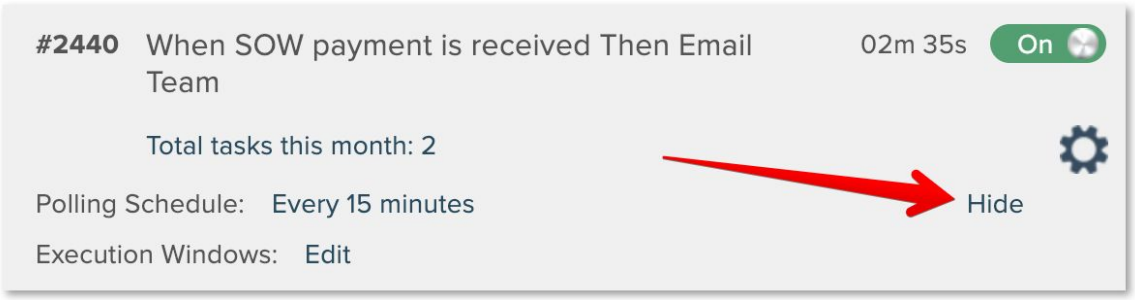
Polling automations can have execution windows defined to run the automation only during certain time windows on certain days, e.g. 8am-5pm M-F:



To not have an automation run on a certain day, set its start and end times to the same value as shown on Saturday and Sunday above.

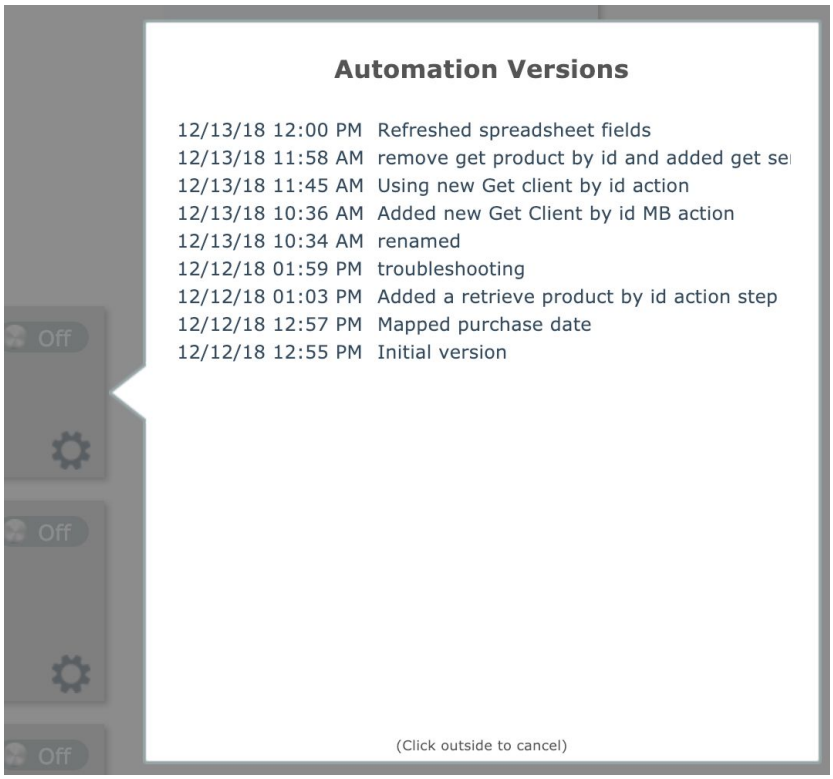
	**Note:** When a polling automation's countdown timer goes to zero, the automation is only evaluated to see if it should be executed or not. The automation will only be executed if the execution window criteria is met.

Click the **Hide** link to hide schedule information:



Manage -> Versions

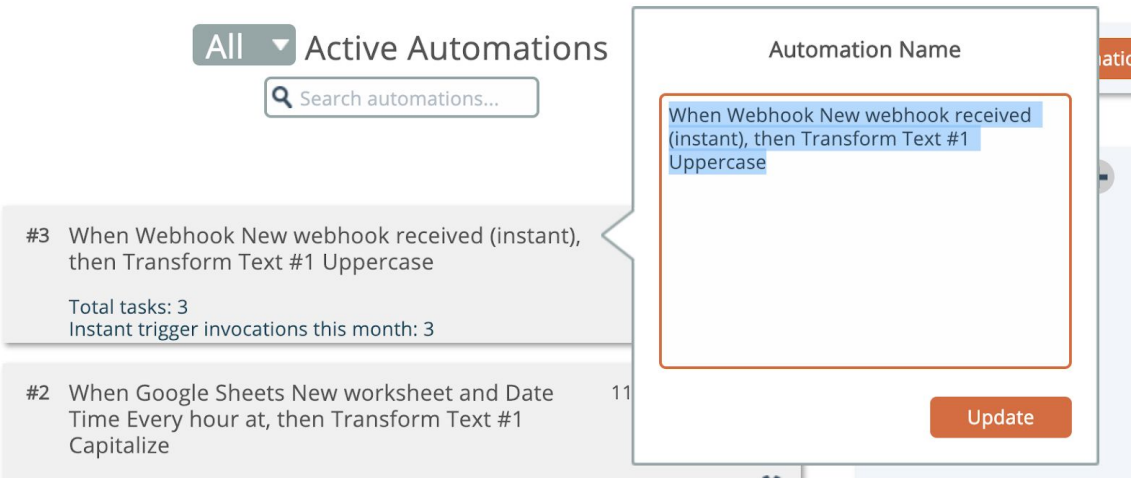
The gear icon menu's **Manage - > Versions** option opens a list of all the automation's saved versions:



Click a version to open it in the automation builder. If you then save the automation, that older version will become the latest version.

Manage -> Rename

The gear icon menu's **Manage -> Rename** option is used to rename an automation directly from the dashboard:



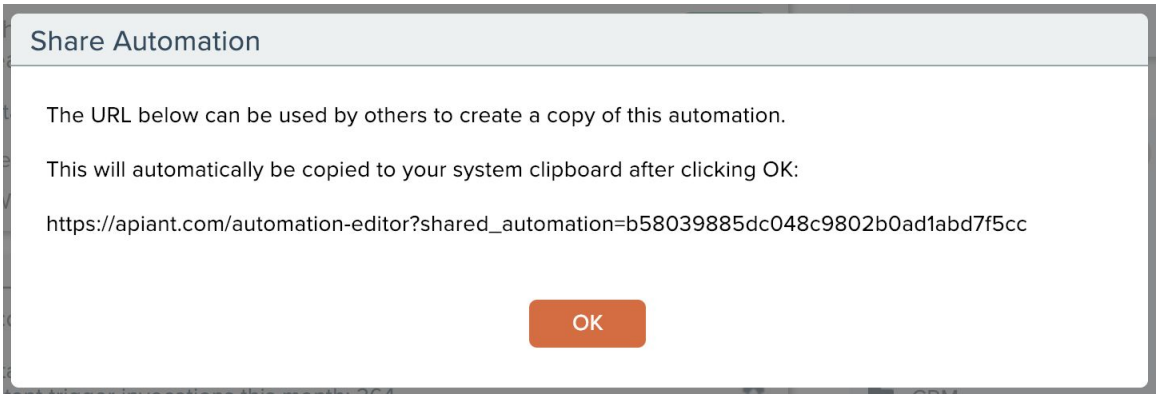
Manage -> Copy

The gear icon menu's **Manage -> Copy** option lets you copy an existing automation, to use it as a template to build a new automation.

	Note: The system does not allow identical automations to be saved.

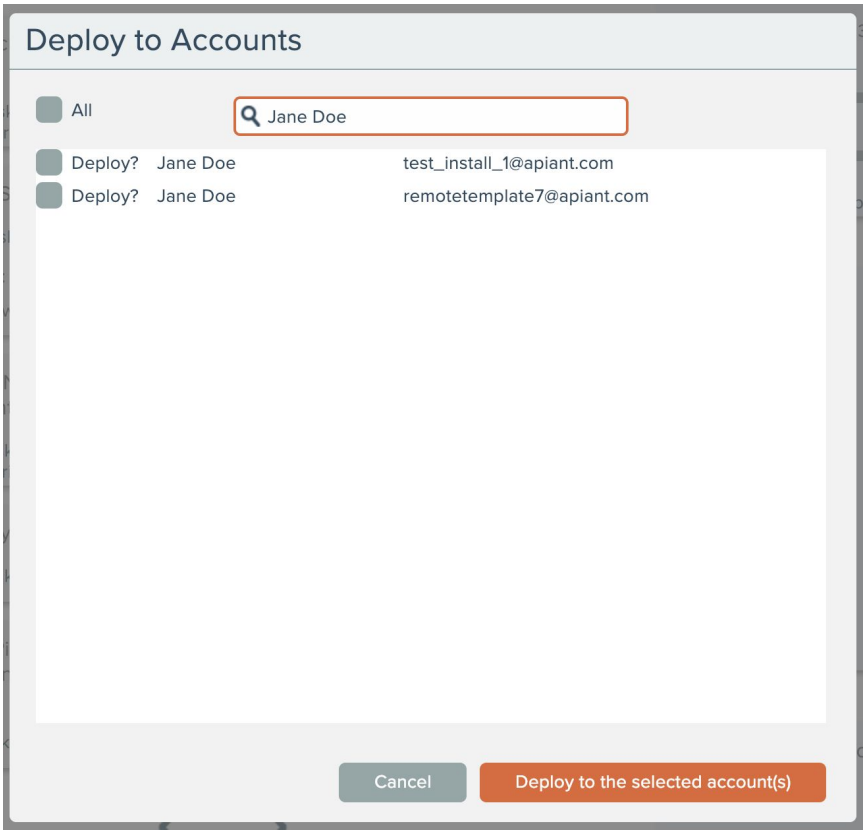
Manage -> Share

The gear icon menu's **Manage -> Share** option generates a link you can give to other system users to let them use a copy of your automation:



Manage -> Deploy

The gear icon menu's **Manage -> Deploy** option lets you deploy an automation directly to one or more other accounts in the system:



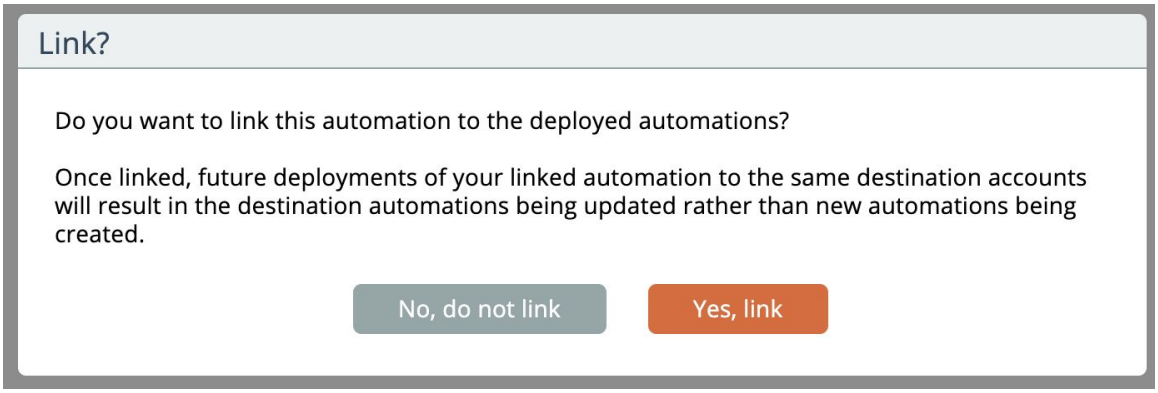
	Note: This menu option is only available if your account has the "Deploy Automations" permission.

Find the account(s) to share the automation with, check the Deploy checkboxes next to the desired accounts, then click the Deploy button to share the automation with the selected account(s).

Linking Automations

Deployed automations can be optionally linked to their destination automations.

If the automation being deployed is not currently linked, a prompt will appear upon clicking the deploy button:

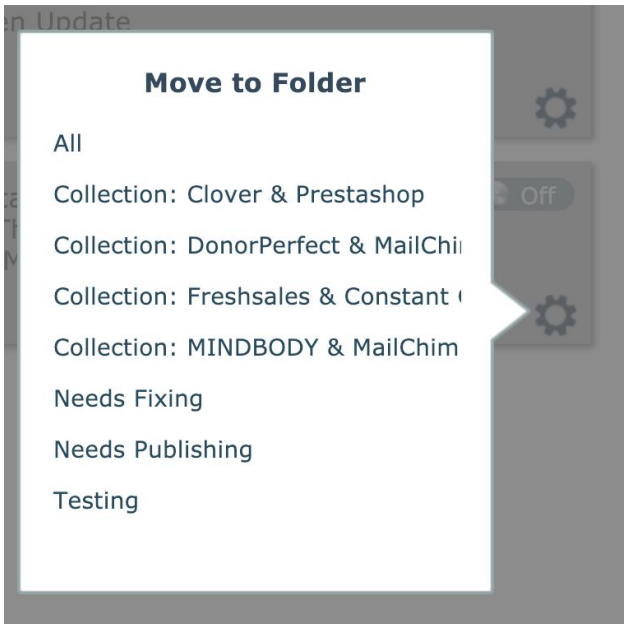


Once linked, if the source automation is edited and later deployed, accounts that already have the linked automation will have that automation updated with the edits.

	**Warning!** Any edits made to linked automations in recipient accounts will be overwritten when the automation is redeployed. When a recipient account edits a linked automation, a message appears to warn that edits will be lost if the sender redeploys the automation.

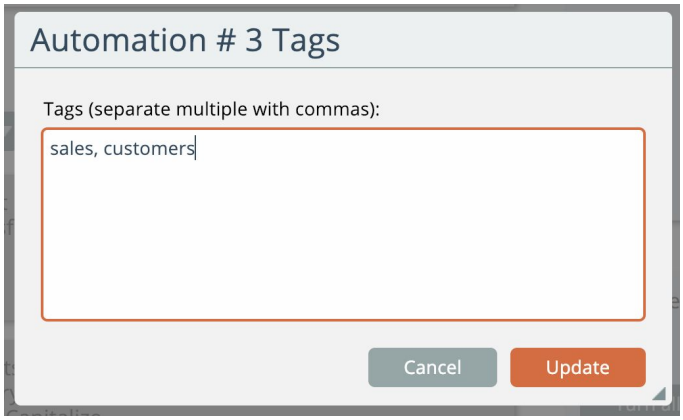
Manage -> Move to Folder

The gear icon menu's **Manage -> Move to Folder** option is used to move an automation to a folder:



Manage -> Tags

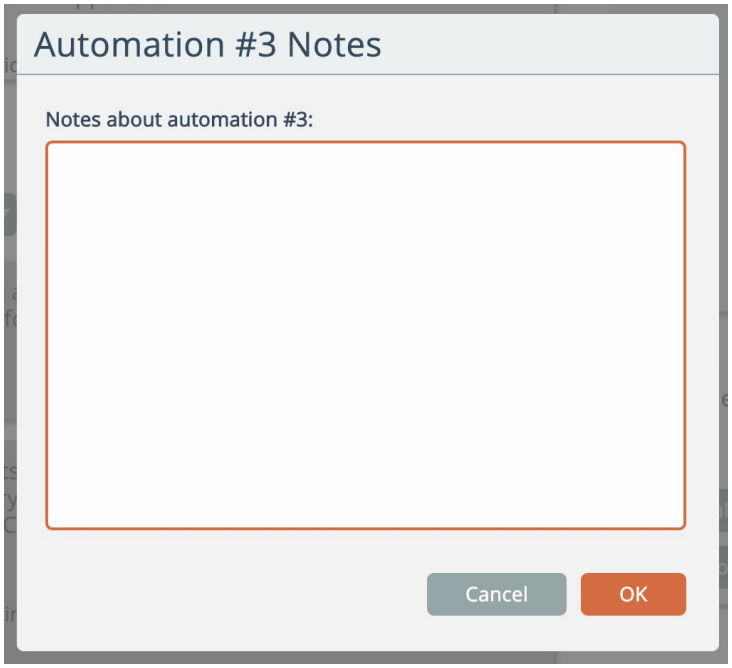
The gear icon menu's **Manage ->Tags** option is used to edit tags for an automation:



Automations can be searched for by tag from the dashboard.

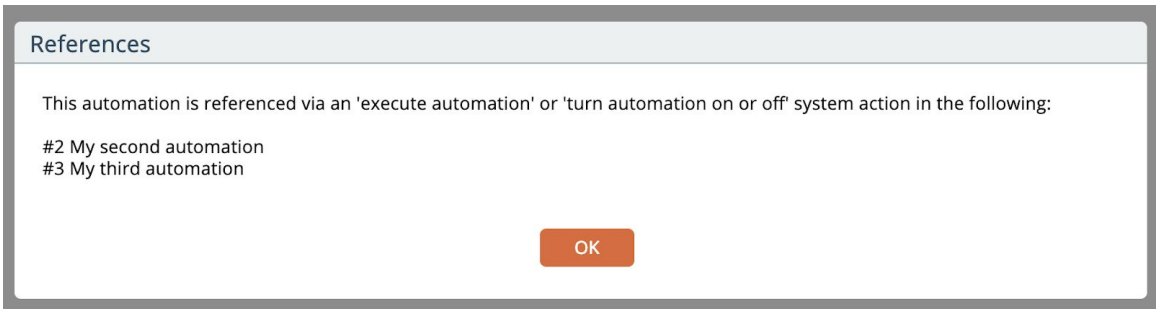
Manage -> Notes

The gear icon menu's **Manage -> Notes** option can be used to document your automations:



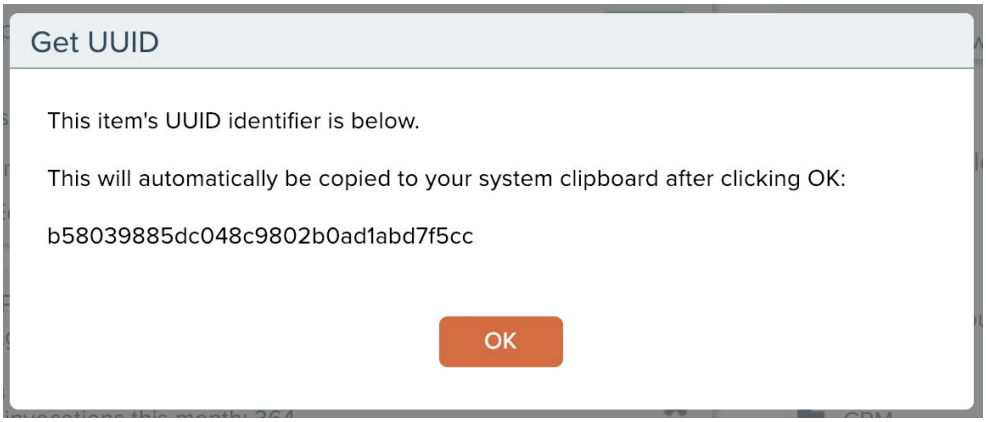
Manage -> Referenced By

The gear icon menu's **Manage -> Referenced By** option lists automations having a "execute automation" or "turn automation on or off" system action that references the automation:



Manage -> Get UUID

The gear icon menu's **Manage -> Get UUID** option copies the automation's unique identifier to your clipboard:

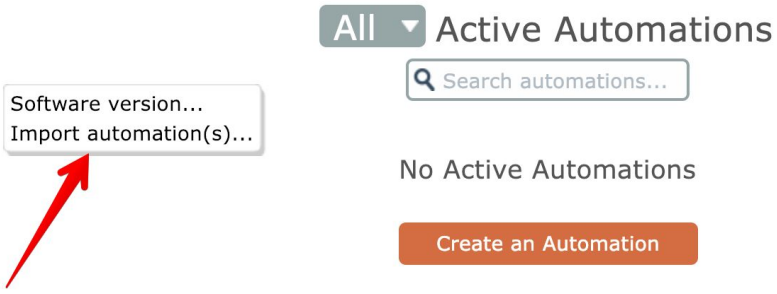


Manage -> Export

The gear icon menu's **Manage -> Export** option can be used to download the automation to your local machine as a file.

	Note: This menu option is only available if your account has the "Export" permission.

The exported automation can then be imported into another APIANT system by right-clicking on the background of the dashboard:



Manage -> Publish as Template to Production

The gear icon menu's **Manage -> Publish as Template to Production** option only appears on development servers for accounts having the "Publish to Production" permission. It publishes the automation to a production server as a template.

Manage -> Publish as Template

The gear icon menu's **Manage -> Publish as Template** option only appears on non-development servers for accounts having the "Automation Templates" permission. It publishes the automation as a template to the "templates" account. The "templates" account is a special system account that manages the template catalog.

Manage -> Delete

The gear icon menu’s **Manage -> Delete** option deletes the automation after your confirmation.