

# webMethods Integration Cloud Help

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This document applies to webMethods Integration Cloud Version 1.2 and to all subsequent releases.

Specifications contained herein are subject to change and these changes will be reported in subsequent release notes or new editions.

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# 1 New Registration

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Registration is the process of creating a new Integration Cloud user account. You need to register to create your instance of the platform in the cloud.

Your organization may have multiple members, for example, your organization may be an entire company, an internal department, or just yourself. Similarly, your Integration Cloud account can have multiple internal users who interact with the platform. The very first person to open the Integration Cloud account becomes the first System Administrator for the tenant. The initial Administrator can then create new users (internal users).

## Creating an Account

Creating an account is the first step in the Registration Process.

### To create a new User Account

1. From the Integration Cloud login screen, click **New Registration**.
2. On the **Registration** page, complete the following fields:

Field	Description
<b>First Name</b>	Provide your first name. You can change the value after the user is created from the <b>Settings &gt; Users</b> screen.
<b>Last Name</b>	Provide your last name. You can change the value after the user is created from the <b>Settings &gt; Users</b> screen.
<b>Company</b>	Provide your company name. You can change that later from the <b>Settings &gt; Company Information</b> screen.
<b>Country</b>	Provide your country name. You can change that later from the <b>Settings &gt; Users</b> screen.
<b>State or Province</b>	Provide your State or Province name. You can change that later from the <b>Settings &gt; Users</b> screen.
<b>Phone</b>	Provide your phone number. You can change that later from the <b>Settings &gt; Users</b> screen.

Field	Description
<b>Sub-Domain for Service Portal</b>	Provide a unique sub-domain, typically your company name. For example, suppose you are at ABC Company and you decide to use “abc” as your unique sub-domain. With that setting, you will access your instance of the platform at https://abc.integrationcloud.com
<b>Email Address</b>	Provide your email address.  The email field becomes both the user name and the email address for the initial user. You can change the values after the user is created, from the <b>Settings &gt; Users</b> screen.
<b>Promo Code</b>	Enter a valid promotion code if you have one, for availing subscription benefits.
<b>I agree to the Terms of Service</b>	Select this option to agree to the webMethods Integration Cloud Terms of Service.

- Click **Submit** to continue to the next step to activate and secure your account or click **Cancel** to go back to the Login screen. After you click **Submit** and as soon as the registration process is complete, an email will be sent to the email address you provided during registration. Use the temporary password sent in the email to log in. You will be asked to change your password.

## Securing your Account

Securing your account is the second step in the Registration process. When you Login for the first time, you are asked to select a security question. This security question and answer is associated with your user name. If you forget your password, this information is used to verify the account ownership.

### To secure your account

- Select a security question from the drop-down list. Optionally, you can select the option **Write my own security question** to compose a personalized security question.
- Provide an answer to the security question.
- Click **Submit**.

**Note:** If you forget your password, in the Login page, click the **Forgot Password?** link, enter your user name, and then click **Submit**. An email is sent that contains a request to answer the Security Question you chose when your account was created. When the email arrives, click the link to open the **Password Reset** page. Provide the answer

to your Security Question and enter a new password. After you provide the correct answer, you can log in with your changed password.



## 2 My Information

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This screen allows you to view the profile information for the logged in user for the Integration Cloud instance.

You can view the **Basic Information**, **Locale Information**, and the **Address and Contact Information**.

Click the **Edit** button to update the information.

## Editing Security Question and Answer

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### To update the Security Question and Answer

1. From the Integration Cloud navigation bar, go to **User name > My Profile > Security Question**.
2. Select a **Security Question** and type a **Security Answer**. You can change the **Security Question** associated with your Account Login/Password.
3. Click **Submit**.

The User name and Email address can differ, depending on the settings specified in the **My Information** screen.

# 3 Managing Users

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You can use the **Users** screen to create and manage administrators and other users. A User has a login identity, password, email address, and other descriptive attributes.

From the main **Users** screen, you can search for users, create a new user, update existing user information, and reset a user's password.

Users who have the **User and Ownership Controls** permission under **Settings > Access Profiles > Administrative Permissions > User and Ownership Controls** can edit the user information.

## Resetting Passwords

### To reset a User password

1. From the Integration Cloud navigation bar, go to **Settings > Users**.
2. For the User whose password is to be reset, select the user and click **Reset Password**.  
Integration Cloud sends an email notification to the user regarding the password reset.

**Note:** A User can log in and then go to **My Profile** to change the user details. The administrator who created the User can also edit the User details.

## Updating User Information

### To edit or update the user information

1. From the Integration Cloud navigation bar, click **Settings > Users**.
2. Select a user from the list and then click **Edit**.
3. Make necessary modifications. You can also enter or update the following information on the **Address and Contact Information** tab. Required fields are marked with an asterisk in the screen.

Field	Description
<b>Phone</b>	Primary phone number for the user.
<b>Mobile Phone</b>	Mobile phone number for the user.
<b>Fax</b>	Fax number for the user.
<b>Street Address</b>	Street address for the user.

Field	Description
City	City for the user.
State/Province	State or province for the user.
Postal/Zip Code	Postal or ZIP Code for the user.
Country	Country for the user.

4. Click **Apply**.

The default initial information comes from the *Company Information* page, but you can modify it here.

**Note:** A user can log in and then go to **My Profile** to change the user details. The administrator who created the user can also edit the user details.

**Note:** See the related topic on “Adding Users” for information about the other fields.

## Adding Users

You can add users for accessing the platform. The operations that a user can perform is determined by their *Access Profile*. The applications a user can access is determined by the *Application Access Settings*. The default initial information comes from your *Company Information*, but you can change it here for a new user. The data a user can access is determined by their team and the Access Profile.

### To add a user

1. From the Integration Cloud navigation bar, go to **Settings > Users**.
2. From the upper right part of the **Users** screen, click **New User**.
3. On the **Basic Information** tab, complete the following fields. Required fields are marked with an asterisk in the screen.

Field	Description
First name	User's first name as it should appear in the platform.
Last name	User's last name as it should appear in the platform.
Title	User's professional title.

Field	Description
<b>Access Profile</b>	<p>The access profile assigned to the user. Each User is assigned an access profile, which can be shared by other users. An Access Profile specifies the network locations (IP addresses) from which it is possible to login, global record-access permissions that apply to all objects, and administrative permissions. Specify one of the following Access Profiles:</p> <ul style="list-style-type: none"> <li data-bbox="524 552 1338 636">■ <b>Administrator.</b> Provides permissions needed by the System Administrator.</li> <li data-bbox="524 657 1338 772">■ <b>Regular User.</b> Provides permissions that are more appropriate for normal users.</li> </ul> <p>The initial system user is assigned the Administrator profile, making the user a system administrator. By default, the system administrator can change the Administrative Permissions associated with each Access Profile, and can add additional Access Profiles, as needed.</p>
<b>Employee Number</b>	Optional identification number for each employee.
<b>Email</b>	Email address of the user.
<b>User name</b>	User name is a unique name associated with each User and is required to log in. It can be an email address or an alphanumeric text string.
<b>Active</b>	Select this option to indicate that the user account is active. You can use this option to reactivate a locked or disabled user account.
<b>Force password change on first login</b>	<p>Select this option to force the user to change the login password when logging in for the first time.</p> <p>This option is available only when creating a new user.</p>
<b>Send Welcome and Login Information by Email</b>	<p>Select this option to send an email to the user. The email contains information on what they need to know to log in.</p> <p>This option is available only when creating a new user.</p>

4. On the **Locale Information** tab, complete the following fields:

Field	Description
<b>Time Zone</b>	Choose a Time Zone Code from the drop-down list.
<b>Date Format</b>	<p>Choose a Date Format from the drop-down list. "mm" is "Month", "dd" is "Day", and "yyyy" is Year.</p> <p>Dates and Times are used throughout the platform, in Appointments, as Start/End Dates in Tasks, Expected Close Date, Estimated Start/End Date, Date Due, and so on. Default formats are specified under the <b>Settings &gt; Company Information &gt; Advanced Information</b> tab. Administrators and Users can change the default selection in the <b>Users</b> screen.</p>
<b>Time Format</b>	Select a 12-hour clock (hh:mm a) with AM/PM, or a 24-hour clock (HH:mm).
<b>Locale</b>	Select the user's locale setting. This setting determines the format for numbers, decimal fields, and percentages.

5. Click **Add** if you are adding a User or **Apply** if you are editing any User information.

The **Address and Contact Information** tab is displayed when you want to update any information for an existing user. The **Address and Contact Information** screen is available under **<User name> > My Profile > My Information** tab.

**Note:** A User can log in and then go to **My Profile** to change the user details. The Administrator who created the User can also edit the User details.

**Note:** The **Address and Contact Information** section does not appear when adding a new user. Users can fill it in for themselves later, or the Administrator can fill the details by editing the record after the User has been added.





# 4 Managing Password Policies

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A Password Policy defines password requirements and login protections. Users who have the **Access Control** permission under **Settings > Access Profiles > Administrative Permissions > User and Ownership Controls** can edit the Password Policy information.

You can view the password policies for the Integration Cloud instance in this screen.

Click **Edit** to modify Password Policy information.

## Updating Password Policy

You can set password policies for users on the **Update Password Policy** screen.

### To update the Password Policy

1. From the Integration Cloud navigation bar, click **Settings > Password Policy**.
2. Click **Edit**.
3. On the **Update Password Policy** screen, make the necessary modifications.

Field	Description
<b>Minimum Length</b>	Minimum numbers of characters in the password. Default: 6 characters, Range: 6-10 characters.
<b>Required Character types</b>	This option defines the level of security for passwords, which can be simple and allow any character combination, or very secure, requiring Upper and lower case characters, as well as special characters. Default: No Restrictions.
<b>Expires in</b>	The number of days the password remains valid before the user will be prompted to change it. Default: 90 Days, Range: 15, 30, 60, 90, 120 days, Never.  By default, no user is exempt from the Password Policy. You can specify a user to be excluded from the password expiration policy by selecting <i>Never</i> .
<b>New Password cannot match</b>	The new password cannot match the number of previous passwords. Default: Last Password, Range: Last 2-5 passwords.
<b>Minimum Age</b>	This option specifies the number of days that must pass before a user can change passwords. Default: No Minimum, Range: 1-5 Days.
<b>Account Lockout Threshold</b>	The number of login attempts before the account is locked out. Default: 5 failed tries. Choices: 3-10 failed tries, No limit.

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Field	Description
	<p>The login limit defines the number of failed attempts allowed before a user account is disabled or locked for a specified time. When a user attempts to login and fails (because of an incorrect password), each attempt counts against the login limit. When the login limit is achieved, the account is disabled or locked for a specified time, according to the parameters set in the <i>Account Lockout Duration</i> field. The login limit is defined by the <i>Password Policy</i>.</p>
<b>Account Lockout Duration</b>	<p>The length of time that an account is locked out. Default: 15 minutes. Choices: 5, 10, 15, 30 minutes, 1 hour, Disable.</p>
<b>Record Information</b>	<p>For audit purposes, the following information is displayed only after the record is saved:</p> <p>Last Modified By &lt;username&gt; on {date} &lt;time&gt; Created by System</p>

4. Click **Apply**.



# 5 Managing Access Profiles

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An *Access Profile* specifies a collection of permissions that can be applied to multiple users. Each user is assigned an Access Profile, which can be shared by other users.

Users who have the **User and Ownership Controls** permission under **Settings > Access Profiles > Administrative Permissions > User and Ownership Controls** can edit the Access Profiles information.

An Access Profile specifies:

- The network locations (IP addresses) from where it is possible to login.
- Global record-access permissions (view, create, update, and delete) that apply to those objects the user is allowed to see.
- Administrative permissions. If checked, the user is granted all administrative permissions and if left unchecked, a list of administrative permissions is displayed. Permissions can then be individually selected.

The default Access Profiles are:

- Administrator, which provides permissions needed by the System Administrator.
- Regular User, which provides permissions that are more appropriate for normal users.

The initial system user is assigned the Administrator profile, making the user a system administrator. By default, the system administrator can change the Administrative Permissions associated with each Access Profile, and can add additional Access Profiles, as needed.

**Note:** It is recommended to reserve global permissions only for administrators.

To edit an existing Access Profile, select the profile and click **Edit**. To delete an Access Profile, select the profile and click **Delete**. To create a new Access Profile, click **New Access Profile**.

## Adding or Updating Access Profiles

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Use the **Access Profiles** screen to create or edit profiles assigned to users.

### To add or update an Access Profile

1. From the Integration Cloud navigation bar, go to **Settings > Access Profiles**.
2. Click **New Access Profile** to add a custom access profile or click **Edit** to change any field in an existing Access Profile.
3. On the **New Access Profile** or **Update Access Profile > Access Profile Information** tab, complete the following fields. Required fields are marked with an asterisk in the screen.

Field	Description
<b>Name</b>	Provide a name for the Access Profile. You can reference the profile by name when assigning it to a user.
<b>Description</b>	Provide a general description for the Access Profile.

4. On the **Login IP Access Restrictions** tab, complete the following fields:

Field	Description
<b>IP Address Ranges</b>	<p>For extra security, enter ranges of IP addresses from which users are allowed to access the platform. If a user attempts to login from a computer on a network outside of the specified range, access to the platform is denied.</p> <p><b>Note:</b> A maximum of 25 IP address ranges can be specified. Accepted format is xxx.xxx.xxx.xxx - yyy.yyy.yyy.yyy, where xxx and yyy are numbers in the range 0-255 and xxx.xxx.xxx.xxx is less than or equal to yyy.yyy.yyy.yyy. To specify a single IP address, use the same IP address for the start and endpoint of the range: 192.168.1.1 - 192.168.1.1</p> <p>When a user attempts to log in, the IP address of the system the request originated from is checked against the configured settings. If the address is in the allowed range, the user can continue the login process. Otherwise, login is denied. Access violations are recorded in the audit log, identifying both the user and the IP address from where the login attempt originated. Login restrictions do not apply to Customer Support logins.</p>

5. On the **Administrative Permissions** tab, select the operations a user can perform in order to view, create, update, and delete permissions and to allow the user to customize selected aspects of the platform.

Field	Description
<b>User and Ownership Controls</b>	<p><b>User Management</b> - Select this option if you want to add, update, delete users, or assign users to Access Profiles.</p> <p><b>Access Control</b> - Select this option if you want to allow a user to modify Access Profiles, specify user application access rights, manage Access Profiles, or specify the password policy.</p> <p><b>Manage Personal Setup</b> - Select this option if you want to allow a user to modify the personal information.</p>

Field	Description
<b>Account Controls</b>	<b>Manage Company Capabilities</b> - Select this option if you want to allow users to modify the company information.
<b>Functional Controls</b>	Select the required options under <b>Accounts, Operations, Integrations,</b> and <b>Stages</b> . You must select the required permissions to create, update, or delete those functions.



# 6 Company Information

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This screen specifies your company information. Users who have the **Manage Company Capabilities** permission under **Settings > Access Profiles > Administrative Permissions > Account Controls** can edit the company information.

Click **Edit** to update the company information.

## Updating Company Information

You can view and update the company information and use them across all applications in the platform.

### To update the Company Information

1. From the Integration Cloud navigation bar, go to **Settings > Company Information**
2. Click **Edit**
3. On the **Basic Information** tab, complete the following fields. Required fields are marked with an asterisk in the screen.

Field	Description
<b>Tenant ID</b>	This is the unique ID assigned to your organization's tenancy on the platform.  This field cannot be edited and appears in view only mode under the <b>Basic Information</b> tab.
<b>Company Name</b>	The name of the company. This field accepts only alphanumerics, spaces, and hyphens (-). The company name is automatically populated from the <b>Registration</b> screen.
<b>Street</b>	The street address of the company.
<b>City</b>	The city where the company is located.
<b>State/Province</b>	The state or Province where the company is located. The state or province name is automatically populated from the <b>Registration</b> screen.
<b>Postal/Zip Code</b>	The postal or zip code for the company.
<b>Country</b>	The country where the company is located. The country name is automatically populated from the <b>Registration</b> screen.
<b>System Notification</b>	Enter an address or comma-separated email addresses to receive system notifications. Such notifications can occur, for example,

Field	Description
<b>Email Addresses</b>	when a connection to the system mailbox fails after repeated attempts. This field displays the information from the <b>Registration</b> screen but you can change that later using the <b>Edit</b> button.

4. On the **Advanced Information** tab, complete the following fields:

Field	Description
<b>Time Zone</b>	Choose your time zone from the drop-down list.
<b>Time Format</b>	Choose a time format from the drop-down list. You can choose a 12-hour clock with AM/PM or a 24-hour clock. hh:mm a - 12-hour clock - 3:30 AM, 3:30 PM HH:mm - 24-hour clock - 3:30, 15:30
<b>Date Format</b>	Choose a date format from the drop-down list. mm is "Month", dd is "Day", yyyy is Year and the delimiters are:(/) slash or stroke(-) dash or hyphen(.) period, dot, or full stop.
<b>Default Locale</b>	The field displays the user's initial locale setting and determines the format for numbers, decimal fields, and percentages. Choose any other locale from the drop-down list.
<b>Log All Record Access</b>	Select this field to log all record access attempts in the Audit Log. The Audit Log tracks all changes to data (additions, modifications, or deletions) and customizations to the platform.
<b>Log All Access Violations</b>	Select this field to log all access violations in the Audit Log. The Audit Log displays a full history of actions in the platform.  Most access violations occur when a user attempts to access an element in the platform, but does not have the appropriate permissions.
<b>Last Modified</b>	This field displays the date and time when the company information record was last updated and cannot be edited.



# 7 Stages Management

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- Applying Access Profiles to a Stage ..... 30

Stages provide safe environments for development and testing that are separated from the production environment. They allow Integrations to migrate from the development environment to the production environment through the intermediate environments.

Integration Cloud provides ways to manage the life cycle of an Integration service development. The typical life cycle of an Integration service development involves creating Integrations, testing them, and making them production worthy. Each of these activities can be termed as different stages of an Integration service life cycle development. To aide these activities, Integration Cloud provides you with *Stages*.

Your organization is a tenant in the platform. When you log in to the platform, you log into your organization's tenancy. When you set up a stage, an environment is created for testing and executing the Integrations in the production environment. You can also run the scheduler to schedule Integrations.

A predefined set of stages is allowed, each representing an activity in the Integration service life cycle development. They are:

- Development
- Test
- Pre-Live
- Live

You can create or delete stages only in a particular order. By default, every user gets a *Development Stage*. In the Development Stage, you can create, update, delete, or view Integrations. In other stages, Integrations can be pulled from a preceding stage or deleted. Further, Integrations can be pulled into a stage only from a preceding stage.

**Note:** Users who have the **Functional Controls** permission under **Settings > Access Profiles > Administrative Permissions > Functional Controls** can create, update, or delete the Accounts, Operations, Integrations, and Stages information.

## Applying Access Profiles to a Stage

The typical life cycle of an Integration service development involves creating Integrations, testing them, and making them production worthy. Each of these activities can be termed as different stages of an Integration development.

Every stage can be assigned a number of Access Profiles and users who are assigned the required Access Profiles can perform activities on that stage. For example, if in an Access Profile, **Execute Integrations** permission is granted, then the user assigned with that Access Profile can execute Integrations on the stages to which the Access Profile is assigned. If the Access Profile needs to perform scheduling activity on the Live stage, then the Access Profile needs to have access to that stage as well. The Development stage can be accessed by everyone.

Click **Add** to add the next stage. Multiple boundary arrows indicate that more stages can be added.

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**Note:** The Accounts drop down list in the Live stage lists all the Accounts defined in the Development stage. Accounts that are not present in the Live stage are highlighted. Click on such an Account in the Live stage to view the **Edit Accounts** page. Only active or enabled Accounts are listed in the drop down list.

Click **Delete** to delete a stage. You cannot delete the **Development** stage.

**Note:** When a stage is deleted, everything it contains is erased and cannot be recovered.

---

### To apply Access Profiles to a stage

1. From the Integration Cloud navigation bar, click **Settings > Stages Management**. All stages added including the **Development** stage is displayed. Initially, before any other stages are added, the **Development** stage is displayed.
2. Click the Access Profiles icon and select the Access Profiles you want to apply to the desired stage.
3. Click **Apply**.

The Access Profiles are applied to the selected stage.

**Note:** You can pull Integrations from all other stages except from the **Development** stage. An Integration service depends on the Action, Trigger, and Account. When an Integration is pulled, all its dependents will also be pulled and copied to that stage. If you update only the action or trigger service, then only those will be pulled into the next stage.





## 8 List of Applications

Integration Cloud allows you to create and govern Integrations between Software as a Service (SaaS) or on-premise applications. A set of predefined and configurable Applications are provided, for example, Salesforce, StrikeIron, ServiceNow, and so on, which enable you to connect to the particular SaaS providers.

**Note:** On-Premise applications loaded from on-premise systems are also listed but you will not be able to create Accounts or Operations for on-premise applications. Those can be uploaded only from the webMethods Integration Server.

Further, when you upload services as part of an application from the on-premise Integration Server to webMethods Integration Cloud, the comments field of the service is uploaded and displayed in the webMethods Integration Cloud application. This field will be displayed if present and cannot be edited. See the *Configuring On-Premise Integration Servers for webMethods Cloud* document for more information.

From this screen, you can create Accounts, Operations, and Integrations between different SaaS applications.

For any application, you can select **Accounts**, **Operations**, or **Integrations** if you want to create or edit them for that application.

**Note:** To use any Application, you are required to agree to the summary of terms. Click **I agree** to use the Application. Click **I do not agree** if you disagree with the summary of terms and do not want to use the Application. Click **Cancel** to go back to the **List of Applications** page.

**Note:** Users who have the **Functional Controls** permission under **Settings > Access Profiles > Administrative Permissions > Functional Controls** can create, update, or delete the Accounts, Operations, Integrations, and Stages information.



# 9 Managing Accounts

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- Adding or Editing Accounts ..... 36

This screen lists all the available Accounts. If you have configured the Account details incorrectly in any stage, the stage will appear in red color in the **Connectivity Status** column. If an Account is configured correctly in a particular stage, then the stage will appear in green color and if an Account is not configured in a particular stage, then the stage will appear in white color.

For on-premise Applications, select an Account and then click **Test Account** to view the connectivity status. The Account can be used to execute services on the on-premise Integration Server. See the *Configuring On-Premise Integration Servers for webMethods Cloud* document for information on how to configure Integration Server as an on-premise server for use with Integration Cloud.

**Note:** Only enabled or active Accounts are listed in the drop down list of the Operation wizard, Integration wizard, Look up Transformer, and Stages Management.

You can create, edit, or delete an Account for a particular application.

**Note:** Users who have the required permissions under **Settings > Access Profiles > Administrative Permissions > Functional Controls > Accounts** can create, update, or delete the Accounts information.

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### To create or edit an Account

1. From the Integration Cloud navigation bar, click **Applications**.
2. Select an application from the list and then click **Accounts**.

To use any Application, you are required to agree to the summary of terms. Click **I agree** to use the Application. Click **I do not agree** if you disagree with the summary of terms and do not want to use the Application. Click **Cancel** to go back to the **List of Applications** page.

3. From the **Accounts** screen, click **Add** to add an Account or click **Edit** to update an existing Account.

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## Adding or Editing Accounts

Use the **Accounts** screen to add or update Accounts. The options available may vary according to the selected Application.

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### To add or edit an Account

1. From the Integration Cloud navigation bar, click **Applications**.
2. Select an application from the list and then click **Accounts**.

To use any Application, you are required to agree to the summary of terms. Click **I agree** to use the Application. Click **I do not agree** if you disagree with the summary of terms and do not want to use the Application. Click **Cancel** to go back to the **List of Applications** page.

3. From the **Accounts** screen, click **Add** to add an Account or click **Edit** to change any field in an existing Account.
4. On the **New Account** or **Edit Account** screen, complete the following fields. Based on the **Application** you had selected, applicable fields are displayed. Required fields are marked with an asterisk in the screen.

Field	Description
<b>Save As</b>	Provide a valid name for the Account. This field is common for all Applications.
<b>Description</b>	Provide a description for the Account. This field is common for all Applications.

Click the **Stages Management** option to view the **Stages Management** screen. In the *Development* stage, you can create, update, delete, or view Integrations. In other stages, you can pull Integrations from a preceding stage or delete that stage. Access Profiles, Accounts, or Integrations applied to a particular stage are visible in the drop down lists.

**Note:** You must have the permission to administer stages (**Access Profiles > Administrative Permissions > Functional Controls**) if you want to create or delete stages.

The **Account Configuration** section allows you to provide details to connect with the Application. The options available may vary according to the selected Application.

Click on the following links to go to the respective **Account Configuration** details section:

- Amazon S3 API
- Amazon SQS API
- Salesforce CRM
- Salesforce Bulk Data Loader
- SuccessFactors HCM
- ServiceNow SOAP Web Service
- StrikeIron Contact Verification API

5. Click **Save** or **Update** to save your settings. Click **Save All Stages** to save the changes done in all the stages.

A new Account will be created.

## Account Configuration Options

### Amazon S3 API

Field	Description
<b>Server URL</b>	<p>Provide the login endpoint to initiate communication with the SaaS provider. This is the native provider endpoint target for the connection configuration.</p> <p><b>Note:</b> If you have added any stage in the <b>Stages Management</b> page, the stages will appear as tabs in the <b>Account Configuration</b> section. If you have configured the Account details incorrectly in any stage, the stage will appear in red text and the Account will be inactive. If an Account is configured correctly in a particular stage, then the stage appears in green text and is active. Only active or enabled Accounts are listed in the drop down list of the Operation wizard, Integration wizard, Look up Transformer, and Stages Management.</p>
<b>Connection Timeout</b>	The number of milliseconds a connection waits before canceling its attempt to connect to the resource. If you specify 0, the connection waits indefinitely. Specify a value other than 0 to avoid using a socket with no timeout. Default: 30000 ms.
<b>Signing Algorithm</b>	Explicitly specify the signing algorithm, for example, HMAC-SHA1 Signatures used to sign the message.
<b>Access Key</b>	This is a username. It is an alphanumeric text string that uniquely identifies the user who owns the account. No two accounts can have the same Access Key.
<b>Secret Key</b>	This key plays the role of a password. It is called secret because it is assumed to be known only by the owner. When you type the secret key, it is displayed as an asterisk or dots.
<b>Region</b>	An area specific value.

### Amazon SQS API

Field	Description
<b>Server URL</b>	Provide the login endpoint to initiate communication with the SaaS provider. This is the native provider endpoint target for the connection configuration.

Field	Description
	<p><b>Note:</b> If you have added any stage in the <b>Stages Management</b> page, the stages will appear as tabs in the <b>Account Configuration</b> section.</p> <p>If you have configured the Account details incorrectly in any stage, the stage will appear in red text and the Account will be inactive. If an Account is configured correctly in a particular stage, then the stage appears in green text and is active. Only active or enabled Accounts are listed in the drop down list of the Operation wizard, Integration wizard, Look up Transformer, and Stages Management.</p>
<b>Connection Timeout</b>	The number of milliseconds a connection waits before canceling its attempt to connect to the resource. If you specify 0, the connection waits indefinitely. Specify a value other than 0 to avoid using a socket with no timeout. Default: 30000 ms.
<b>Signing Algorithm</b>	Explicitly specify the signing algorithm, for example, HMAC-SHA1 Signatures used to sign the message.
<b>Access Key</b>	This is a username. It is an alphanumeric text string that uniquely identifies the user who owns the account. No two accounts can have the same Access Key.
<b>Secret Key</b>	This key plays the role of a password. It is called secret because it is assumed to be known only by the owner. When you type the secret key, it is displayed as an asterisk or dots.
<b>Region</b>	An area specific value.
<b>Salesforce CRM</b>	
Field	Description
<b>Server URL</b>	Provide the login endpoint to initiate communication with the SaaS provider. This is the native provider endpoint target for the connection configuration.
	<p><b>Note:</b> If you have added any stage in the <b>Stages Management</b> page, the stages will appear as tabs in the <b>Account Configuration</b> section.</p> <p>If you have configured the Account details incorrectly in any stage, the stage will appear in red text and the Account will be inactive. If an Account is configured correctly in a particular stage, then the stage appears in green text and is active. Only active or enabled Accounts are listed in the drop down list of the Operation wizard, Integration wizard, Look up Transformer, and Stages Management.</p>

Field	Description
<b>Connection Timeout</b>	The number of milliseconds a connection waits before canceling its attempt to connect to the resource. If you specify 0, the connection waits indefinitely. Specify a value other than 0 to avoid using a socket with no timeout. Default: 30000 ms.
<b>Username</b>	This is the user account name on the SaaS provider that the Account will use to connect to the SaaS provider. The Account will use this credential to connect to the SaaS provider.
<b>Password</b>	Provide a password for the user name to initiate communication with the SaaS provider.

### Salesforce Bulk Data Loader

Field	Description
<b>Server URL</b>	Provide the login endpoint to initiate communication with the SaaS provider. This is the native provider endpoint target for the connection configuration. <p><b>Note:</b> If you have added any stage in the <b>Stages Management</b> page, the stages will appear as tabs in the <b>Account Configuration</b> section. If you have configured the Account details incorrectly in any stage, the stage will appear in red text and the Account will be inactive. If an Account is configured correctly in a particular stage, then the stage appears in green text and is active. Only active or enabled Accounts are listed in the drop down list of the Operation wizard, Integration wizard, Look up Transformer, and Stages Management.</p>
<b>Connection Timeout</b>	The number of milliseconds a connection waits before canceling its attempt to connect to the resource. If you specify 0, the connection waits indefinitely. Specify a value other than 0 to avoid using a socket with no timeout. Default: 30000 ms.
<b>Username</b>	This is the user account name on the SaaS provider that the Account will use to connect to the SaaS provider. The Account will use this credential to connect to the SaaS provider.
<b>Password</b>	Provide a password for the user name to initiate communication with the SaaS provider.



## SuccessFactors HCM

Field	Description
<b>Server URL</b>	<p>Provide the login endpoint to initiate communication with the SaaS provider. This is the native provider endpoint target for the connection configuration.</p> <p><b>Note:</b> If you have added any stage in the <b>Stages Management</b> page, the stages will appear as tabs in the <b>Account Configuration</b> section.</p> <p>If you have configured the Account details incorrectly in any stage, the stage will appear in red text and the Account will be inactive. If an Account is configured correctly in a particular stage, then the stage appears in green text and is active. Only active or enabled Accounts are listed in the drop down list of the Operation wizard, Integration wizard, Look up Transformer, and Stages Management.</p>
<b>Connection Timeout</b>	<p>The number of milliseconds a connection waits before canceling its attempt to connect to the resource. If you specify 0, the connection waits indefinitely. Specify a value other than 0 to avoid using a socket with no timeout. Default: 30000 ms.</p>
<b>Username</b>	<p>This is the user account name on the SaaS provider that the Account will use to connect to the SaaS provider. The Account will use this credential to connect to the SaaS provider.</p>
<b>Password</b>	<p>Provide a password for the user name to initiate communication with the SaaS provider.</p>
<b>Company ID</b>	<p>The companyID that SuccessFactors provided, when your company registered with them.</p>

## ServiceNow SOAP Web Service

Field	Description
<b>Server URL</b>	<p>Provide the login endpoint to initiate communication with the SaaS provider. This is the native provider endpoint target for the connection configuration.</p> <p><b>Note:</b> If you have added any stage in the <b>Stages Management</b> page, the stages will appear as tabs in the <b>Account Configuration</b> section.</p> <p>If you have configured the Account details incorrectly in any stage, the stage will appear in red text and the Account will be inactive. If an Account is configured correctly in a particular stage, then the</p>

Field	Description
	stage appears in green text and is active. Only active or enabled Accounts are listed in the drop down list of the Operation wizard, Integration wizard, Look up Transformer, and Stages Management.
<b>Connection Timeout</b>	The number of milliseconds a connection waits before canceling its attempt to connect to the resource. If you specify 0, the connection waits indefinitely. Specify a value other than 0 to avoid using a socket with no timeout. Default: 30000 ms.
<b>Username</b>	This is the user account name on the SaaS provider that the Account will use to connect to the SaaS provider. The Account will use this credential to connect to the SaaS provider.
<b>Password</b>	Provide a password for the user name to initiate communication with the SaaS provider.

#### Strikelron Contact Verification API

Field	Description
<b>Server URL</b>	<p>Provide the login endpoint to initiate communication with the SaaS provider. This is the native provider endpoint target for the connection configuration.</p> <p><b>Note:</b> If you have added any stage in the <b>Stages Management</b> page, the stages will appear as tabs in the <b>Account Configuration</b> section. If you have configured the Account details incorrectly in any stage, the stage will appear in red text and the Account will be inactive. If an Account is configured correctly in a particular stage, then the stage appears in green text and is active. Only active or enabled Accounts are listed in the drop down list of the Operation wizard, Integration wizard, Look up Transformer, and Stages Management.</p>
<b>Connection Timeout</b>	The number of milliseconds a connection waits before canceling its attempt to connect to the resource. If you specify 0, the connection waits indefinitely. Specify a value other than 0 to avoid using a socket with no timeout. Default: 30000 ms.
<b>Username</b>	This is the user account name on the SaaS provider that the Account will use to connect to the SaaS provider. The Account will use this credential to connect to the SaaS provider.
<b>Password</b>	Provide a password for the user name to initiate communication with the SaaS provider.

# 10 Managing Operations

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Integration Cloud provides pre-configured applications. The Applications contain SaaS provider-specific information that enables you to connect to a particular SaaS provider. Further, each Application uses an Account to connect to the provider's back end and perform Operations.

**Note:** Users who have the required permissions under **Settings > Access Profiles > Administrative Permissions > Functional Controls > Operations** can create, update, or delete Operations.

Each application comes with a predefined set of Operations. You can also create your own custom Operations and also edit/delete those custom Operations. This screen lists all the available Operations for a selected application including predefined Operations.

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### To create or edit a custom Operation

1. From the Integration Cloud navigation bar, click **Applications**.
2. Select an application from the list and then click **Operations**.

To use any Application, you are required to agree to the summary of terms. Click **I agree** to use the Application. Click **I do not agree** if you disagree with the summary of terms and do not want to use the Application. Click **Cancel** to go back to the **List of Applications** page.

3. From the **Operations** screen, click **Add** to add an Operation, click **Edit** to update an existing Operation, or click **Delete** to delete an existing Operation.

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## Adding or Editing Operations

Use the **Operations** screen to add, edit, or delete custom Operations.

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### To add or edit a custom Operation

1. From the Integration Cloud navigation bar, click **Applications**.
2. Select an application from the list and then select **Operations**.

To use any Application, you are required to agree to the summary of terms. Click **I agree** to use the Application. Click **I do not agree** if you disagree with the summary of terms and do not want to use the Application. Click **Cancel** to go back to the **List of Applications** page.

3. From the **Operations** screen, click **Add** to add a custom Operation or click **Edit** to update an existing custom Operation. You can edit the Operation or the Business Parameter.
4. On the **Select your <...> account** screen, complete the following fields. Required fields are marked with an asterisk in the screen.

Field	Description
<b>Name</b>	Provide a name for the custom Operation.
<b>Description</b>	Provide a description for the custom Operation.
<b>Type</b>	<p>Select the type of Operation you want to perform for the selected application.</p> <p>A <b>Trigger</b> is an Operation which fetches data from an application and which can be used in the Source section while creating an Integration.</p> <p>An <b>Action</b> is an Operation which uploads data to an application and which can be used in the Target section while creating an Integration.</p> <p><b>Note:</b> You will not be allowed to change these options after the Operation is created.</p>
<b>Select Account</b>	Select an Account created for the Application from the drop down list. Only active or enabled Accounts are listed in the drop down list.
<b>Select functional area</b>	Select the Application service from the drop down list. This option is applicable only for certain applications.

5. Click **Next**
6. Select the Operation to be performed and then click **Next**.
7. Select the business object to be processed by the Operation and then click **Next**. Business objects will appear only for certain applications and Operations.
8. Select the data fields to be added if any, and then click **Next**. Data fields will appear only for certain applications and Operations.
9. Verify the details in the **Confirm Operation** page and then click **Finish** to create the custom Operation.

**Note:** You will not be able to delete an Operation if it is used by an Integration.

After you click **Finish** or **Save**, if there are any Business Parameters, you will be asked to configure the Business Parameters. Currently, Business Parameters Configuration screen appears only for Upsert Operations for Salesforce.



# 11 My Integrations

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An Integration service is an orchestration of a source and a target Operation with appropriate data mappings and transformations.

This screen lists Integrations created for cloud-based SaaS applications with other cloud-based applications and also SaaS applications with on-premise applications. It also displays the Applications involved to create the Integration, when the Integration was created, and who created it. You can delete, edit, and create a new Integration from this screen.

**Note:** Users who have the required permissions under **Settings > Access Profiles > Administrative Permissions > Functional Controls > Integrations** can create, update, delete, execute, or pull Integrations.

Select an Integration and click the Integration name link under the **Name** column for that Integration, to view the Integration Details page. The **Execution Results** link in the **My Integrations** page allows you to view the audit trail of all the executions that happened in that stage.

## Creating Integrations

Integration Cloud enables you to integrate your cloud-based Software as a Service (SaaS) applications, with other cloud-based SaaS applications. It also integrates your SaaS applications with on-premise applications.

Integration between two cloud providers includes the following steps:

- Invocation of a source Operation on an application, which fetches data from it
- Invocation of a target Operation on an application, which uploads data into it
- Filtering the data fetched from an application, before it is passed on to the target application
- Mapping the data fetched from an application, to the structure needed by the target application to which you want to upload the data.

### To add or edit an existing Integration

1. From the Integration Cloud navigation bar, click **Integrations**. The **My Integrations** screen appears.
2. To edit an existing Integration, select an Integration from the **My Integrations** screen and click **Edit**.
3. To create a new Integration, from the **My Integrations** screen, click **Add New Integration**.

To use any Application, you are required to agree to the summary of terms. Click **I agree** to use the Application. Click **I do not agree** if you disagree with the summary of terms and do not want to use the Application. Click **Cancel** to go back to the **List of Applications** page.



4. Provide a name and description of your Integration. Required fields are marked with an asterisk in the screen.
5. Drag and drop your applications to the **Source** and **Target** sections. You can also double-click an Application to move it to the required section.
6. Select an Account and then select a custom or a predefined Operation in both the **Source** and **Target** sections. Only active or enabled Accounts are listed in the drop down list.

**Note:** If you had already done the mapping for a source and target Operation, and you want to change any of the source and target Operations, all the mappings you had performed before will be removed.

7. Click **Next** to filter the data fetched by the application selected in the source section, before it is passed on to the application selected in the target section. Click **Load Data** to preview the data as well as view the data filters. The source Operation fetches the data and displays a sample of the data in the preview pane. Out of all the records fetched, you may want to upload only selected records. To do this, you can have a selection or a filter criteria so that you can view only a few records. A sample preview of only 12 records can be viewed to analyze the kind of data that exists in the system. After you analyze the records, you can set filters, to upload, for example only Accounts which are based out of California to the target application. After you set the filters, whenever you run the Integration, all records will be fetched from the source application, but only the filtered records will be moved to the target application after mapping and transformation.
8. Click **Next** to map the data fetched by the application selected in the source section, to the structure needed by the application selected in the target section.

Select the **Show Mapping Hints** option to display the ... icon beside relevant fields. Click on the ... icon to display mapping suggestions. You can also select a field from the source section and drag and drop it on to a relevant field in the target section. Red colored arrows indicate incorrect mappings. Select a mapping and then click **Unmap** to unmap only the selected mapping. Click **Clear All** to unmap all the mapped elements. Select a field in the target Operation table and then choose **Set Value > Set** to set a value for the field in the target Operation. You can select the field and then choose **Set Value > Clear** to clear the value.

Select **Add** from the **Set Transformer** drop down menu to display the **Select Transformer** screen. This screen allows you to transform the source Operation data, for example, concatenate two strings and map it to a single field. The *fx* icon appears after a transformer is set up correctly. You can click the *fx* icon and select **Edit** or **Delete** from the **Set Transformer** drop down menu to either modify the transformer or delete it. The **Select Transformer** screen also allows you to look up and use data from another source Operation to transform the data.

9. Click **Next** to review your Integration.
10. Click **Save** and then click **Finish** to create your Integration.

## Integration Details

This screen allows you to view at which stage the Integration is running, the Applications and Accounts involved to create the Integration including the Look up Transformer, when the Integration was created or last modified, who created or last modified the Integration, when was the last execution, and whether the Integration is scheduled. You can also delete, edit, or expose the Integration as a REST service from this screen.

Option	Description
<b>Develop</b>	Click to view the <b>My Integrations</b> screen.
<b>Execution Results</b>	Click to view the <b>Execution Results</b> screen.
<b>Created On</b>	Displays the date when the Integration was created.
<b>Created By</b>	Displays the user who created the Integration.
<b>Applications</b>	Displays the Applications used to create the Integration including the Look up Transformer. Click an Application to view the specific Application details screen.
<b>Stages</b>	Displays different stages of the Integration development. You can pull Integrations from all other stages except from the <b>Development</b> stage.
<b>Edit</b>	Click to modify the Integration.
<b>Delete</b>	Click to delete the Integration from a stage.
<b>Accounts</b>	Displays the Accounts used by the Integration. Click an Account to view the specific Account configuration screen.
<b>Last Modified</b>	When and by whom was the Integration last modified.
<b>Status</b>	If the Integration in a stage is scheduled, then the status of the Integration displays <b>Scheduled</b> , else it appears as <b>Not Scheduled</b> . The Status appears as <b>Schedule Paused</b> if the Integration is paused.
<b>Last Execution</b>	When was the Integration last executed. A warning message appears if the last execution was not successful.

Option	Description
<b>Resume</b>	Click to start the Integration that was paused.
<b>Schedule</b>	Click to schedule the Integration to run immediately or at a specified date and time. You can also define a recurrence pattern to run the Integration.
<b>Run Now</b>	Click to submit the Integration for execution.
<b>Pull</b>	Click to pull an Integration from a preceding stage into this stage. You can pull an Integration after you have configured the Accounts for each stage in the Account Configuration page.
<b>Expose as REST service</b>	<p data-bbox="446 766 1326 1008">Check this option if you want to trigger the execution of an Integration from an external system. By default, Integration flows built in Integration Cloud are not accessible using REST. This feature provides you with one more option to trigger Integration executions from a software application, for example, a REST Client, apart from manual and scheduled integrations from the user interface.</p> <p data-bbox="446 1029 1326 1165">Once the flow is exposed as a REST service, the REST URL appears. Click the <b>Show Advanced Options</b> link to view the HTTP Method, sample JSON input, and the parameters which are required to invoke this Integration from an external system.</p> <p data-bbox="446 1186 1326 1323">Provide the usage URL, HTTP Method, modified or the sample JSON input, and necessary parameters in the external program, including the required security credentials (user name and password) while submitting the REST service.</p> <p data-bbox="446 1344 1326 1512">After the request is sent, the response will contain a status indicating whether the Integration has been submitted for execution. The response will also contain a reference to the execution result identifier so that a new REST call can be made later to get the execution results.</p> <p data-bbox="446 1533 1326 1564"><i>Application Status Codes</i></p> <ul data-bbox="446 1585 1326 1743" style="list-style-type: none"> <li>■ 0 - SUCCESS: Successfully submitted the Integration for execution.</li> <li>■ -1 - ERROR: Problem while submitting the Integration for execution.</li> </ul> <p data-bbox="446 1774 1326 1806"><i>HTTP Status Codes</i></p> <ul data-bbox="446 1827 1326 1864" style="list-style-type: none"> <li>■ 200 - OK</li> </ul>

Option	Description
	<ul style="list-style-type: none"> <li>■ 201 - Created</li> <li>■ 500 - Internal Server Error</li> <li>■ 401 - Unauthorized User Error</li> </ul> <p>To get the execution results, construct the URL of the new REST call from the URI field available in the <i>Response</i> section.</p> <p>To construct the URL of the new REST call, add the response URI obtained from <i>resultReference</i> in the <i>Response</i> section to:</p> <pre>https://&lt;sub-domain&gt;.webMethodscloud.com/integration</pre> <p><b>Example:</b></p> <pre>https://&lt;sub-domain&gt;.webmethodscloud.com/integration/rest/assembly/external/execution/result?resultReference=76fb5733-6a21-4b02-864f-5e958f698373</pre> <p><i>Application Status Codes</i></p> <ul style="list-style-type: none"> <li>■ 0 - SUCCESS</li> <li>■ -1 - ERROR</li> </ul> <p><i>HTTP Status Codes</i></p> <ul style="list-style-type: none"> <li>■ 200 - OK</li> <li>■ 500 - Internal Server Error</li> <li>■ 401 - Unauthorized User Error</li> <li>■ 404 - Not Found</li> </ul> <p><b>Note:</b> You must provide your user name and password to execute the Integration from the external program, else you may encounter the 401 - Unauthorized User Error. Further, if the query response HTTP status code is 404 - Not Found, it means that either the Integration is not yet executed or the <i>resultReference</i> is incorrect.</p>

## Execution Results

The **Execution Results** screen allows you to view the audit trail of all the executions that happened in a stage.

### To view the execution results

1. From the Integration Cloud navigation bar, click **Integrations**. The **My Integrations** screen appears.

2. From the **My Integrations** screen, select the Integration for which you want to view the execution results.

3. Click the **Execution Results** link to view the **Execution Results** screen.

You can also click the **Execution Results** link in the Home page or click **Integrations > Execution Results** to view the **Execution Results** screen.

4. Select the **Integration**, the **Stage**, and the time period for which you want to view the execution results.

The **Integration** and the **Stage** fields will be automatically populated if you select the **Execution Results** link for an Integration from the **My Integrations** screen.

5. Click **Show Results** to view the execution results.