Integration Scenarios

InfoSheet

I have a registration form and I want to be able to add 3 fields of information from this form to my HR system when the form is submitted. Is this possible?

Yes. You would use a Trigger for this. In this case a SUBMIT trigger will allow you to hook your own component into the forms processing. Your component will then always be called when a form is submitted. You can then access the submitted XML directly or using API calls and extract the 3 fields of data you want to pass to your HR system.

But how do I add it to my HR system?

That is not a question we can answer. The integration of anything with your HR system is a matter for your developer and the HR vendor. They will almost certainly have a published API or import mechanism.

How easy is it to do this type of integration?

We have comprehensive sample code and documentation that explains all the likely integration scenarios. We provide skeleton triggers and lookups which you can use as the starting point for your own.

As with any advanced system, it is not suitable for hobby developers.

So what are triggers?

A trigger is an event that is “triggered” by our Form Server system that calls a special server component that your developers (or our professional services team) can write. Your component temporarily gets control at these trigger points and does what it needs to do before returning control to our Form Server system. This all happens in real time and results in a seamless process.

How do I add them into the system?

You add a trigger component to the Form Server system by adding the following information to the Form Server trigger configuration list:

- Trigger event (see list in next question)
- Name of the component (DLL)
- Name of the function within the component

What trigger events are there?

- Data submitted
- Form about to load
- Form request received
- Form deployed
- Form recalled

Integration Scenarios

InfoSheet

These are explained in more detail as follows

SUBMIT	This trigger is called whenever a form is submitted. Your component can then extract some or all of the form data and pass it to other systems or databases.
PRELOAD	Just before the form loads, a preload trigger can be called to set required fields from your own back-end systems or databases. Can be used to load a full data set back into a form. Or in a portal situation where someone loads a new, empty form you could get information about the respondent from the portal back-end and then pass it into visible, hidden or read-only form fields. Quask also has an optional Active Directory plug-in that can automatically map Active Directory fields into form fields whenever a new, empty form loads.
FORM REQUEST	This trigger is actually called before the PRELOAD trigger and is used to handle authentication. Quask can optionally authenticate for any specific form using NTLM but you may require your own approach.
DEPLOY	Called whenever a new form is published to the server. If you wanted to maintain a list of published forms in your own systems you would use this trigger to add to the list as soon as a form is added.
RECALL	This is analogous to the DEPLOY trigger. Whenever a form is recalled from the system, this trigger will be called.

What languages can I use to develop triggers?

As FormArtist Server and FormArtist WorkFlow are .Net systems, the fullest support is offered by C# and VB.Net. However, you can also write components using JavaScript or VBScript as well as any language that generates a COM object.

I need to perform a database lookup while the form is being filled in. How do I do this?

Standard Lookups allow you to perform server side database lookups without the need for programming. You define named server side ODBC connections and queries. These can be passed an optional parameter (typically field data from the form being completed). The named query is called by a simple form command and the lookup is performed. The query result is then automatically passed back to the form where it can either populate lists or can populate multiple form fields.

Custom Lookups can also be written. In this case, the form passes control to a custom written web page that pops up and allows the form respondent to perform any type of interactive search. The custom lookup simply has to return data to the form in the defined way.

Quask

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Integration Scenarios

InfoSheet

I want to handle access to the forms myself. We have an LDAP system and we need to be able to authenticate the user and then pass key information to the form. How do I do this?

You would write a trigger component using the FORMREQUEST trigger event.

We do not want people to have to log on to the WorkFlow Tracker Portal if they have already logged on to the Intranet / Network.

FormArtist WorkFlow uses NTLM authentication to handle this, so not just Intranet users but also suppliers and customers can access the Portal (if you allow them to). FormArtist WorkFlow uses the person's email address as the User ID when someone logs on to the Tracker Portal. The first time anyone logs on they will have to use their email address. However, if the Tracker Portal sees that the user is logged on to the domain then it will remember this for the future and automatically allow that person into the correct account.

With our optional Active Directory support module you can also import users directly from AD.

We need to be able to update form fields programmatically. No actual user will be editing the form, but one of our in-house systems will need to change a field value for a specific form. How is this done?

This would require the Form Server API. In your system you would store the form's "Instance ID". When your system needed to update a field within that form instance it would call the API, request the record with that ID and then write to the required field via the API.

How is the data stored in your system?

Our main system stores data in a very simple yet fast and efficient format. For all forms and form instances there is a single field in a single table that simply stores the complete form XML so it can be saved and passed back into forms very efficiently. This could be accessed by a developer but it is not recommended. The API provides a better means of access to this.

There is an optional second table that is created for each individual form. This table has a regular structure (one table field per form field). Form Server manages this table automatically. You could easily access this for read-only purposes. Data that is written to this table does not update the central XML data.

I want to use a 3rd party reporting tool. How would I set this up so it can see the data?

You would connect to the "optional second table" described above.

As an international organization, we order in different currencies. Can your forms support multiple currencies?

Yes. Our integration module can pull any data out of your accounting system and use it in the form. Currency information can therefore be used to translate amounts to your base currency. This ensures that the base currency is always used for the calculation of approval thresholds.

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Integration Scenarios

InfoSheet

How do I link my forms to my accounting system for things like Purchase Orders and Expenses?

Our Finance Plus solution actually caters specifically for this. The Purchase Order forms can do lookups on supplier and account code tables that can be taken from your accounting software. Once the PO data has been collected and approved, it can then be transferred over to your accounts package.

We use a dedicated piece of integration software the manages the data transfer in both directions. This also allows the accounts representative to review and even edit the purchase orders (and other data) that is about to be entered into you accounts package. This gives the accounts person control and reassurance that what is about to be transferred is correct.

Does your system support "XYZ" accounting package?

We support many of the most commonly used systems on the market. If you use one of these then you will pay the standard cost. If you don't then we will add a new adapter to the integration module.