BPA
Platform

Technical Overview

Save File Tool

codeless
PLATFORMS

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Head Office:

Codeless Platforms

Suite 1 & 2 Bourne Gate

25 Bourne Valley Road

Poole

BH12 1DY

United Kingdom

Tel: +44 (0) 330 99 88 700

Email: enquiries@codelessplatforms.com

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Introduction

The **Save File** tool saves output from another task step capable of producing some form of document, as one or more files on the local hard drive or network location.

For example, save HTML output from a **Format as HTML** step as one or more `.HTM` files to send as an email, or save output from a **Format as Text** step as a `.CSV` file for use by another application, such as Microsoft Excel.

Features

- Save single or multiple files to the file system
- Any file type such as `.HTM` or `.CSV` provided by step outputs
- Save a columns value from an Input step, such as **Database Query (ODBC)**, into a file
- Static or dynamic paths
- Static or dynamic file names
- Memory features to memorise task data created at run-time

Working with other Tools

The **Save File** tool can interact directly with the following tools:

Consuming from Other Tools

The **Save File** tool can consume objects outputted by the following tools:

Icon	Tool Name	Tool Category
	**Database Query (ODBC)**	Input and Data Connectors
	**Database Query (OLEDB)**	Input and Data Connectors
	**Import Flat File**	Input
	**Import XML Document**	Input
	**Retrieve Text Message**	Input
	**Convert Recordset to XML**	Format
	**Convert XML to Recordset**	Format
	**Create Workflow Job**	Format
	**Format as Flat File**	Format
	**Format as HTML**	Format
	**Format as HTML Pro**	Format
	**Format as Text**	Format

Icon	Tool Name	Tool Category
	**Run Crystal Report**	Format
	**Run Microsoft Reporting Services**	Format
	**Run Microsoft Word (Merge)**	Format
	**Transform Data**	Format
	**Call Task**	Execute
	**Filter Data**	General
	**Web Service Connector**	Data Connectors
	**Applications Platform Connector**	Data Connectors

Objects Consumed

The following objects, outputted by the above tools, can be consumed by the **Save File** tool:

- **Recordset** — Tabular data from any BPA Platform tool capable of exposing such data (see above)
- **Documents (Any)** — Documents of any type

Exposing to Other Tools

As an Output category tool, **Save File** does not expose any objects that can be directly consumed by another tool. However, it does expose the following objects which can be used in a task step sequence:

- **RecordSource** — If an **Input Recordset** has been selected (see General tab), this contains the columns included in the recordset
- **DocumentSource** — If a **Document Source** has been selected (see General tab), this contains the data in the document as recordset columns

- **Memory Definitions** — If configured, this is a list of **Memory Definitions** created for the step and the recordset columns to be memorised for each one
- **Step Properties** — Standard step properties are available allowing you to use statistical data of the tool

Global Configuration

The **Save File** tool does not require any global configuration before it can be used in a task.

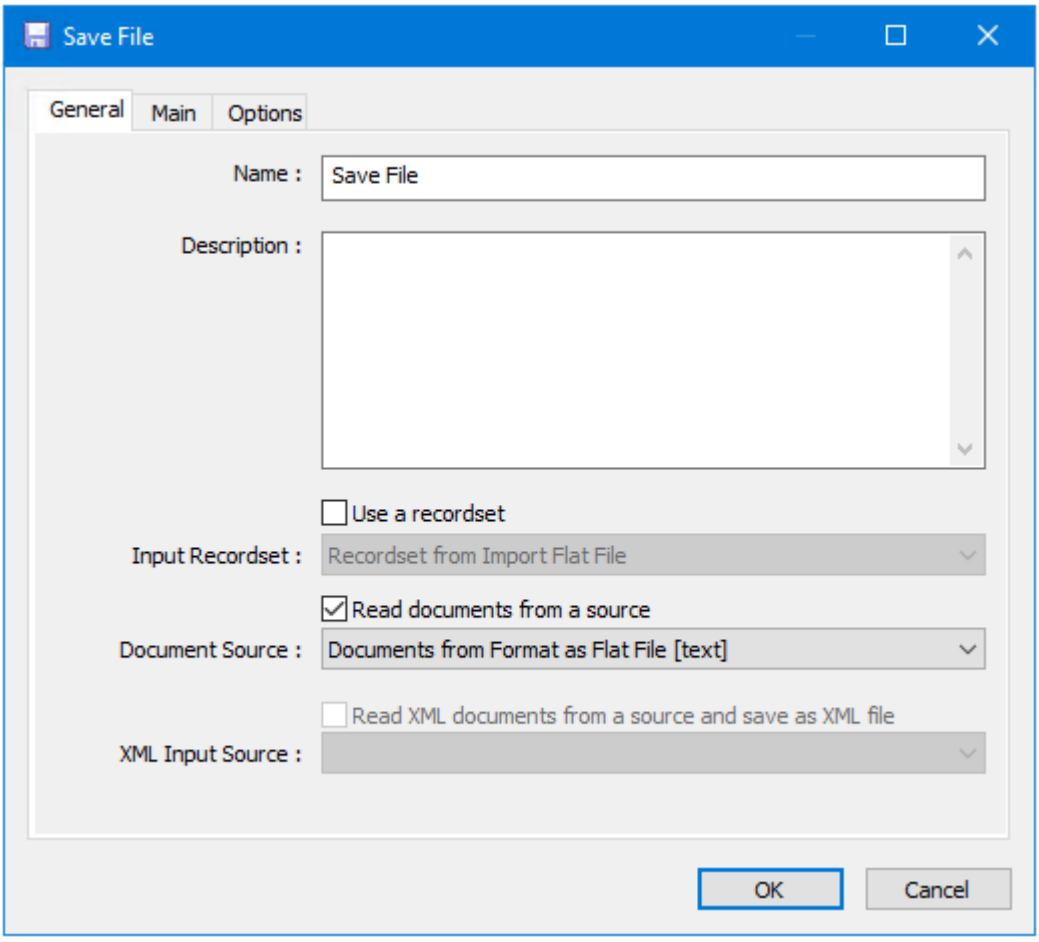
Step Configuration

To add a new **Save File** step to an existing task, you either:

- Click and drag the **Save File** icon from the **Task Browser** to the task **Design** area.
- From the task's **Design** tab, right-click on empty space and select ***Add > Output > Save File.***

For a detailed description of how to create new tasks, refer to the product help.

About the General Tab



The **General** tab is used to enter the following details for the step:

- **Name** — Enter a meaningful name for the step

> **TIP:** If this task instance makes use of two or more **Save File** steps, ensure the **Name** used is unique for each individual step.

- **Description** — If required, enter a description of this step
- **Use a Recordset** — Enable this parameter if recordset data from a previous task step is required when saving the file
  - **Input Recordset** — Contains all available recordsets from steps previously created in the task
- **Read documents from a source** — Enable this parameter if document data from a Format task step is required when saving the file

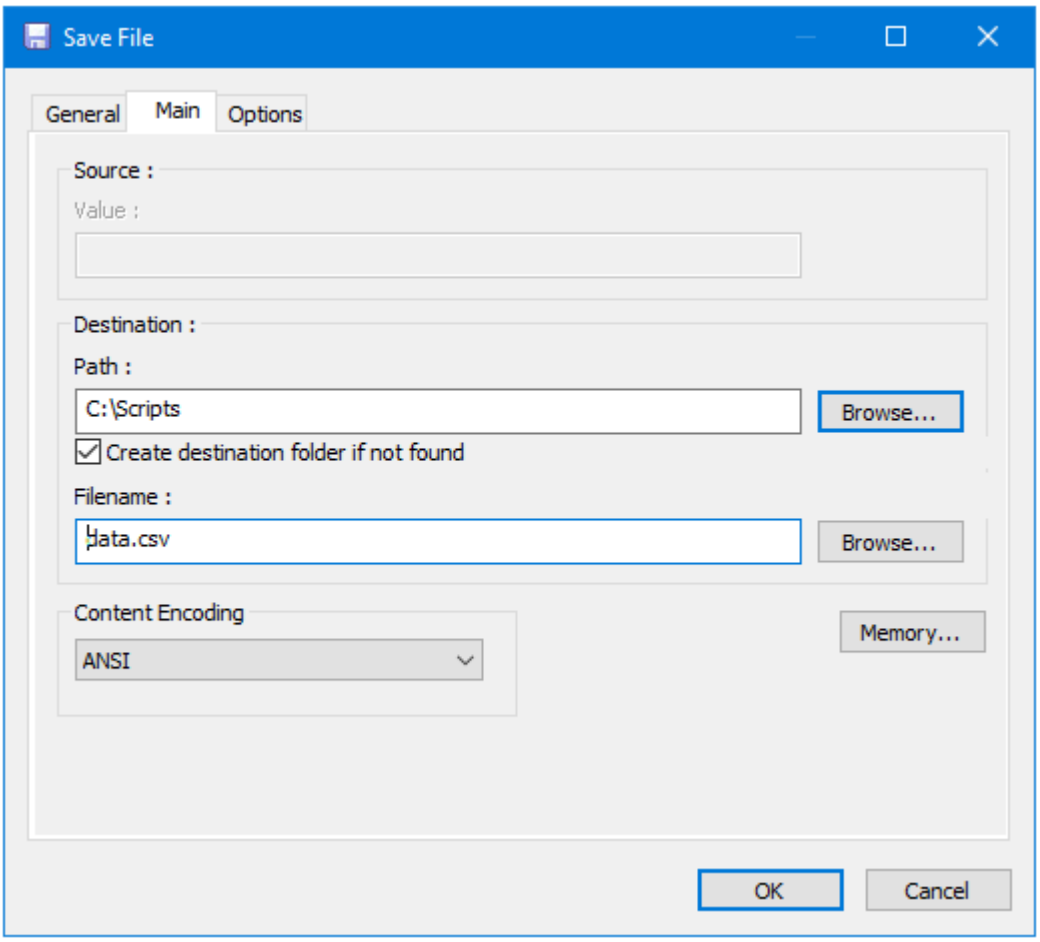
- **Document Source** — Contains all available documents from Format steps previously created in the task; note that the document format is displayed after the step name

- **Read XML documents from a source and save as XML file** — Enable this parameter if XML documents are being read and saved
  - **XML Input Source** — Contains all available XML documents from steps previously created in the task

> **TIP:** Although it is valid to use **Read documents from a source** when consuming and saving XML files, it is recommended you always use **Read XML documents from a source and save as XML file** for such scenarios due to the specific processing of XML files.

About the Main Tab

Use the **Main** tab to set the saved filed path and the saved filename.

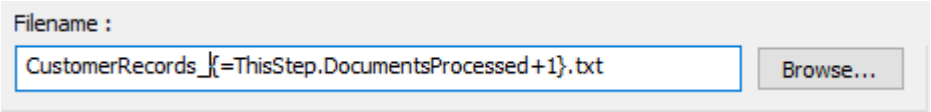


If this task step consumes a recordset (see General tab), use **Source** to specify the saved file's contents. You can drag-and-drop variables and recordset data from the Task Browser to build the file contents. If consuming a document or XML source, these form the saved file's contents.

Specify the saved file's **Path**. You can use an existing folder or enable **Create destination folder if not found** to have the **Save File** step create the folder automatically if it can't find the one specified. You can drag-and-drop variables and recordset data from the Task Browser build the file path or create a dynamic entry depending on run-time data.

Specify the saved file's **Filename**. You can drag-and-drop variables and recordset data from the Task Browser to build the filename or create a dynamic entry depending on run-time data.

TIP: If a unique field is not part of the consumed **RecordSource**, **DocumentSource**, or **XML Document Source**, use the **DocumentsProcessed** Task Browser property to create an auto-incrementing filename — Add **+1** before the end parenthesis:



The above configuration results in filenames of:

CustomerRecords_1.txt
CustomerRecords_2.txt
CustomerRecords_3.txt

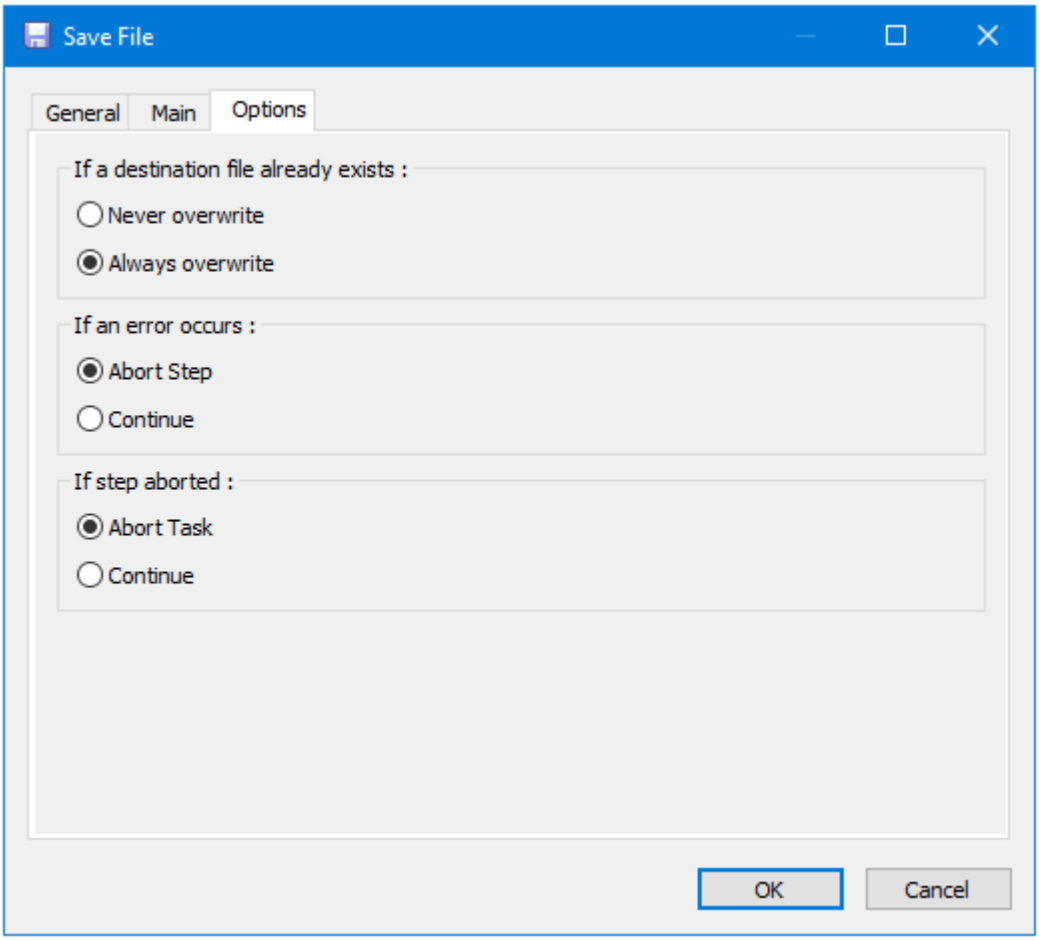
and so on.

By default, all saved files use **ANSI** encoding. If a different **Content Encoding** is required, select this from the drop-down.

Use **Memory** to memorise some or all of the step output for use in other task steps. This is particularly useful when the **Save File** step is called multiple times — use **Memory** to compare the document previously processed to the new document currently being processed to avoid duplicates.

About the Options Tab

The **Options** tab allows you to define how errors in this step are handled at task runtime.



If a destination file already exists, you can chose whether to **Never overwrite** or **Always overwrite**.

> **NOTE:** If **Never Overwrite** is selected and an existing file found during a task run, an error is logged to the Event Log but the new file data is *not* saved.

If an error occurs, you can decide whether the step should **Continue** processing, or terminate the step immediately (**Abort Step**).

If the step is aborted, you can choose to **Continue** processing onto the next step in the task, or terminate the whole task immediately (**Abort Task**).

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+44 (0) 330 99 88 700


enquiries@codelessplatforms.com


www.codelessplatforms.com



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