Epicor ERP Put BAQ (UBAQ) Activity

Introduction

An Epicor ERP put BAQ (UBAQ) activity updates a Business Activity Query at an Epicor ERP connection and is used as a target in an operation. After configuring an Epicor ERP connection, you can configure as many Epicor ERP activities as you like for each Epicor ERP connection.

Creating an Epicor ERP Activity

From the design canvas, open the **Connectivity** tab of the design component palette:

Within the **Endpoints** filter, click the Epicor ERP connection block to display activities that are available to be used with an Epicor ERP connection:

To create an activity that can be configured, the activity must first be added to an operation on the design canvas. To add an activity to an operation, drag the activity block from the palette to the operation.

For more information about the parts of an operation and adding activities to operations, see Operation Creation and Configuration.

Accessing Menu Actions

After an Epicor ERP activity has been added to an operation, menu actions for that activity are accessible from the project pane in either the **Workflows** or the **Components** tabs, and from the design canvas:

- **Project Pane:** In the **Workflows** or **Components** tab of the project pane, hover over an activity name and click the actions menu icon to open the actions menu.
- **Design Canvas:** Within the operation, click an existing activity block to open the actions menu.

Each of these menu actions is available:

- **View/Edit:** This opens the activity configuration screen for you to configure the activity. For details, see *Configuring an Epicor ERP Put BAQ (UBAQ) Activity* later on this page.
- **Delete:** This is used to permanently delete the activity.
- **Rename:** This positions the cursor on the activity name in the project pane for you to make edits.
- **View Dependencies:** This changes the view in the project pane to display any other parts of the project that the activity is dependent on.
- **Remove:** Available only from the actions menu on the design canvas, this removes the activity as a step in the operation without deleting it from the project. When you remove an activity that is adjacent to a transformation, if schemas are provided within that activity, they will no longer be referenced by the transformation. Removed components can be accessed or permanently deleted from the project pane.
- **Deploy:** This deploys the activity and any components it is dependent on.
- **Configurable Deploy:** This opens the deployment screen, where you can select project components to deploy.
- **Add to group:** This opens a prompt to create a new custom group or to add the component to an existing group.
- **Duplicate:** This creates a copy of the activity as a new, unreferenced component. Upon creating the component copy, the cursor is positioned on the component name within the project pane for you to rename the component.

Configuring an Epicor ERP Put BAQ (UBAQ) Activity

Follow these steps to configure an Epicor ERP put BAQ (UBAQ) activity:

- Step 1 – Select Company Name
- Step 2 – Select a UBAQ Service
- Step 3 – Review Data Schema

Step 1 – Select Company Name

- **Name:** Enter a name to use to identify the Epicor ERP put BAQ (UBAQ) activity. The name must be unique for each put BAQ (UBAQ) activity and must not contain forward slashes (/) or colons (:).
- **Select Company Name:** This section displays companies available in the Epicor ERP endpoint. When reopening an existing activity configuration, only the selected company is displayed instead of reloading the entire company list.
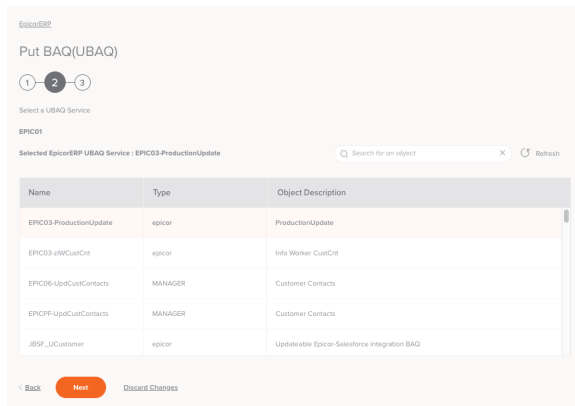   - **Selected Company Name:** After a company is selected, it will be listed here.
    - **Search:** Enter any part of the company into the search box to filter the list of companies. The search is not case-sensitive. If companies are already displayed within the table, the table results will be filtered in real time with each keystroke. To reload companies from the endpoint when searching, enter search criteria and then refresh, as described below.

- **Refresh:** Click the refresh icon ⟳ or the word **Refresh** to reload companies from the Epicor ERP endpoint. This may be useful if you have recently added companies to the Epicor ERP instance. This action refreshes all metadata used to build the table of companies displayed in the configuration.
- **Select a Company:** Within the table, click anywhere on a row to select a company. Only one company can be selected. The information available for each service is fetched from the Epicor ERP endpoint:
    - **Name:** The company from Epicor ERP.
    - **Type:** The company name from Epicor ERP.

TIP: If the table does not populate with available companies, the Epicor ERP connection may not be successful. Ensure you are connected by reopening the connection and retesting the credentials.

- **Optional Settings:** Use the disclosure control to expand the available optional settings. One optional setting is currently available.

    - **Request Timeout:** Set the **Request Time** limit (in either seconds or minutes) for the **Request Timeout**. If not set, by default it is 15 seconds.
- **Save & Exit:** If enabled, click to save the configuration for this step and close the activity configuration.
- **Next:** Click to temporarily store the configuration for this step and continue to the next step. The configuration will not be saved until you click the **Finished** button on the last step.
- **Discard Changes:** After making changes, click **Discard Changes** to close the configuration without saving changes made to any step. A message will ask you to confirm that you want to discard changes.
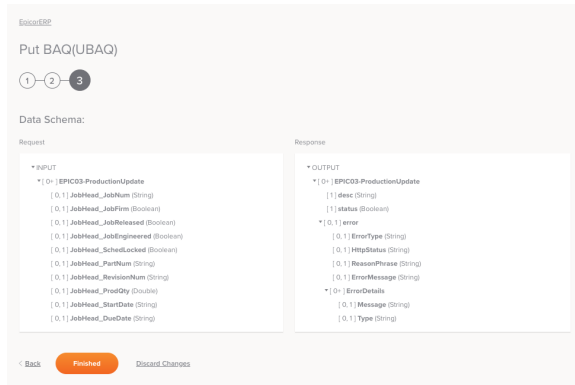
Step 2 – Select a UBAQ Service

- **Select a UBAQ Service:** This section displays UBAQ services available for the selected company in the Epicor ERP endpoint. When reopening an existing activity configuration, only the selected service is displayed instead of reloading the entire service list.

    - **Selected Company:** The company selected in the previous step will be listed here.
    - **Selected Epicor ERP UBAQ Service:** After a service is selected, it will be listed here.
    - **Search:** Enter any part of the service name into the search box to filter the list of services. The search is not case-sensitive. If services are already displayed within the table, the table results will be filtered in real time with each keystroke. To reload services from the endpoint when searching, enter search criteria and then refresh, as described below.

    - **Refresh:** Click the refresh icon ⟳ or the word **Refresh** to reload services from the Epicor ERP endpoint. This may be useful if you have recently added services to the Epicor ERP instance. This action refreshes all metadata used to build the table of services displayed in the configuration.
    - **Select a Service:** Within the table, click anywhere on a row to select a service. Only one service can be selected. The information available for each service is fetched from the Epicor ERP endpoint:
        - **Name:** The service name from Epicor ERP.
        - **Type:** The service type from Epicor ERP.
        - **Object Description:** The service description from Epicor ERP.

TIP: If the table does not populate with available services, the Epicor ERP connection may not be successful. Ensure you are connected by reopening the connection and retesting the credentials.

- **Back:** Click to temporarily store the configuration for this step and return to the previous step.
- **Next:** Click to temporarily store the configuration for this step and continue to the next step. The configuration will not be saved until you click the **Finished** button on the last step.
- **Discard Changes:** After making changes, click **Discard Changes** to close the configuration without saving changes made to any step. A message will ask you to confirm that you want to discard changes.

Step 3 – Review Data Schema

- **Data Schema:** The request and response data schemas for Epicor ERP will be displayed. If the operation uses a transformation, the data schemas will be displayed again later during the transformation mapping process, where you can map to target fields using source objects, scripts, variables, custom values, and more.

  The Epicor ERP connector uses the Epicor REST API, available in a Swagger UI from `https:/ /<epicor-host-name>/Server/api/help/`. Refer to the API documentation for information on the schema fields. (A login to Epicor is required; substitute your Epicor host name in the above URL.)
- **Back:** Click to temporarily store the configuration for this step and return to the previous step.
- **Finished:** Click to save the configuration for all steps and close the activity configuration.
- **Discard Changes:** After making changes, click **Discard Changes** to close the configuration without saving changes made to any step. A message will ask you to confirm that you want to discard changes.
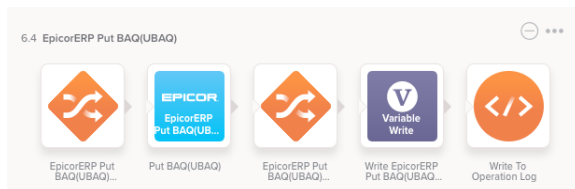
Next Steps

After configuring an Epicor ERP put BAQ (UBAQ) activity, complete the configuration of the operation by adding and configuring other activities, transformations, or scripts as operation steps. You can also configure an operation's operation settings, which include the ability to chain operations together that are in the same or different workflows.

Epicor ERP put BAQ (UBAQ) activities can be used as a target with these operation patterns:

- *Transformation Pattern*
- *Two-Transformation Pattern* (as the first or second target)

Other patterns are not valid using Epicor ERP put BAQ (UBAQ) activities. See the validation patterns on the Operation Validity page.

An example of using the activity in an operation:

To use the activity with scripting functions, write the data to a temporary location and then use that temporary location in the scripting function.

When ready, deploy and run the operation and validate behavior by checking the operation logs.