



Boomi Essentials

Version 2.0



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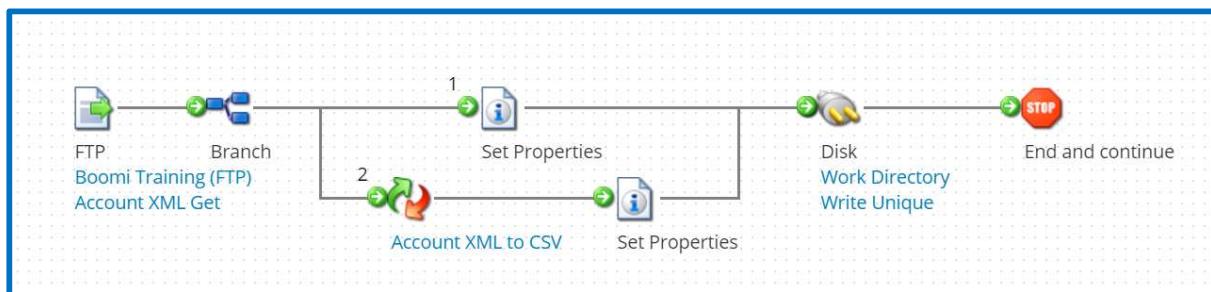


Boomi Essentials

You are a Boomi consultant with this assignment: Your customers sign up for an AtomSphere trial account by entering account and contact information in an online form. The information is then sent to a FTP server in XML format. You will build an Excel spreadsheet containing latest account data and archive it for reporting.

Below are the steps to complete the process:

1. Request account XML from the FTP data store
2. Archive a copy of the XML file on a directory
3. Format response data into CSV flat file type
4. Archive the new CSV file on a directory



Exercise 1: Folder Setup

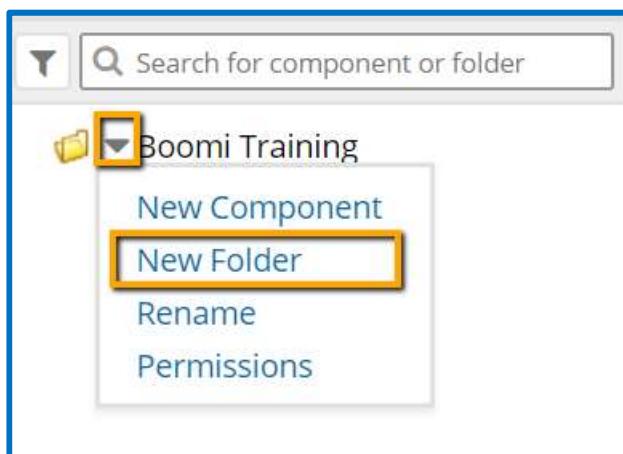
When developing a new integration project it is important to organize the Component Explorer, in the Build Tab, by setting up folders to organize processes and components. This enables you to configure and store a unique Process containing the workflow and processing rules for your business scenario.

Create folders within your account

The root folder has sub-folders storing your training exercises for all the classes you take with Dell Boomi as well as a #Connections folder to store all your connections.

In the Component Explorer, click the blue drop-down arrow next to your main account folder.

1. Choose **New Folder**.



2. Enter the folder Name of **Boomi Essentials**.

The dialog box has a title 'New Folder' and a note '* Required fields.' It shows the path as '\Boomi Training' and the name field containing 'Boomi Essentials'. At the bottom are 'Save' and 'Cancel' buttons.

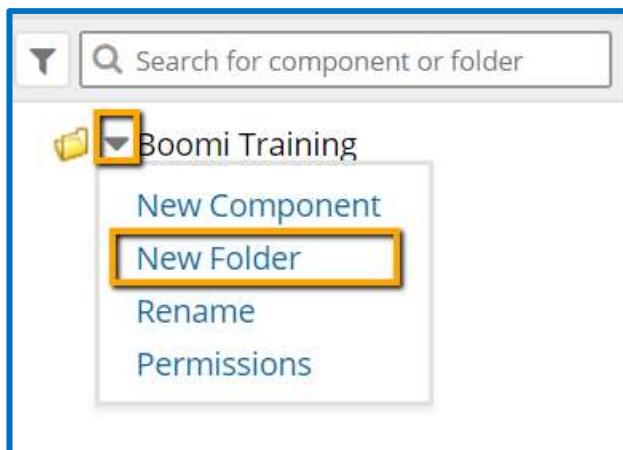
New Folder	
* Required fields.	
Path	\Boomi Training
Name*	Boomi Essentials
Save Cancel	

3. Click **Save** to create the Boomi Essentials folder.

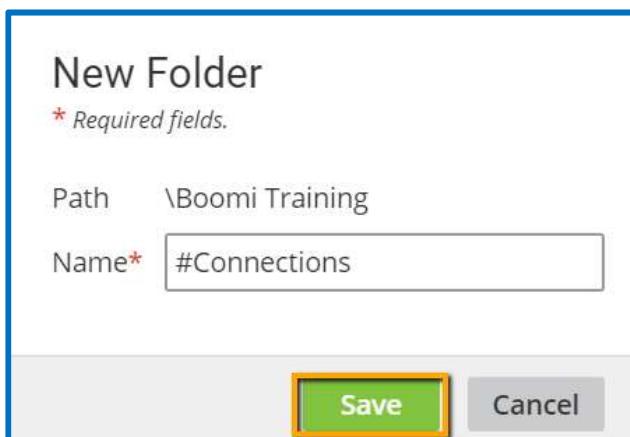
Exercise 1: Folder Setup

Once again, in the Component Explorer, click the blue drop-down arrow next to your main account folder.

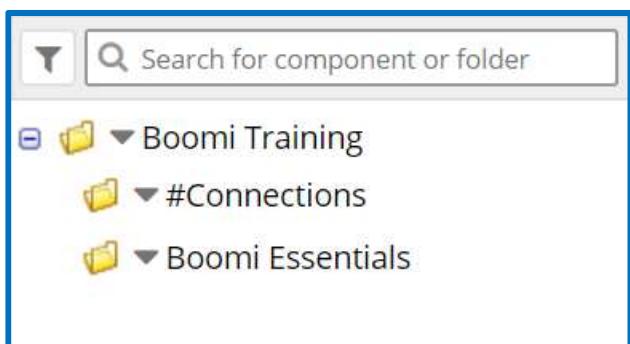
4. Choose **New Folder**.



5. Enter the folder Name of **#Connections**.



6. Click **Save**. Your folder structure should look like below:

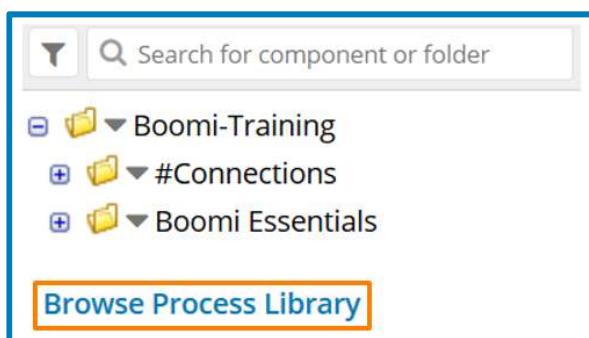


Exercise 2: Download Process from the Process Library

Boomi offers a way for developers to get a head start on solving common integration goals. The Process Library has different types of pre-built processes to install to complete an integration or give yourself a solid platform to build off.

Process Library

1. Below the **Component Explorer**, click the **Browse Process Library** link at the bottom of the window.



2. The Process Library window appears. In the upper right corner of the window, click the **Search** bar.

A screenshot of the Boomi Process Library window. The title bar says "Boomi Process Library". On the left, there is a "Search Results" section with a table. The first row in the table is highlighted with a yellow border and contains the text "Account XML to CSV", "Published on 13 Oct 2017 15:53:38 by Education Services", "Process used in Boomi Essentials", a "View" button, and an "Install" button. To the right of the search results, there is a sidebar with a search bar containing "Boomi Essentials", a "Filter by Publisher" section with checkboxes for "Dell Boomi" and "Education Services", and a "Sort by" dropdown set to "Published Date".

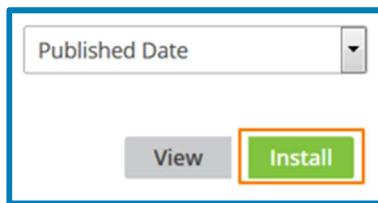
3. Type “**Boomi Essentials**” into the **Search Bar**.



*The Process Library processes are filtered based on the search criteria. The **Account XML to CSV** process for the **Boomi Essentials** class is now displayed.*

4. Select the **Account XML to CSV** process from the list by clicking on the green **Install** button.

Exercise 2: Download Process from the Process Library



The installation screen appears. Here you can select the installation location and process name for the local version.

5. Click the location field where it says **Choose** and select the **Boomi Essentials** folder created earlier.
6. Click the **Process Name for Local Version** field, and make sure it says **Account XML to CSV**.



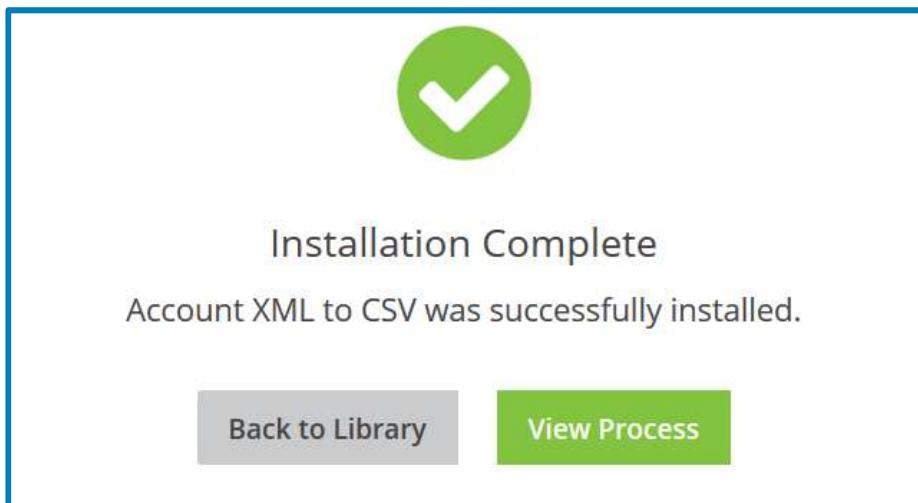
*It is a best practice to use a naming convention to describe your process. In our class we use **Account XML to CSV**.*

7. Once entered, scroll to the bottom of the **Process Library** window and click the green **Install** button in the lower right corner.



The process will install into your **Component Explorer**. The following confirmation screen will display:

Exercise 2: Download Process from the Process Library



8. You can now click the **View Process** button to open the **Account XML to CSV** process on the build tab.

You are now ready to configure your endpoint connectors.



Exercise 3: Access the FTP Connection

This exercise accesses a reusable connection component in an integration needing the same connectivity information. To configure the inbound documents to enter a process, set up a Start Shape. The Start Shape defines a connector containing the information to make a request to a client application or data source. By default, the Start Shape is a Connector type in the top row of the window.

1. In the **Connector** field, choose **FTP** from the drop-down option.

This automatically uses the Action: **Get**.

The screenshot shows the configuration of a 'Start Shape' in the Dell Boomi AtomSphere interface. The 'Type' is set to 'Connector'. The 'Action' is set to 'Get'. The 'Connection' dropdown is set to 'Boomi Training (FTP)'. The 'Operation' dropdown has 'Choose...' selected. The 'General' tab is active.



Each shape has an optional Display Name field. Display names are used for certain shapes (e.g., Decision and Set Properties), but they are not generally used for Connector shapes.

2. The **Connection** is completed for you with the **Boomi Training (FTP)**. It includes all the information needed to log into the FTP server previously set up for this class.



Exercise 3: Access the FTP Connection

General Parameters

Display Name	<input type="text"/>
Connector	FTP
Action	Get
Connection	<input type="text"/> Boomi Training (FTP) 
Operation	<input type="text"/> Choose... 

3. You can open the **Boomi Training (FTP)** connection component by clicking on the pencil symbol on the right side of the Connection component field.

Boomi Training (FTP) - FTP    Add Description

FTP Host SSL Options

Host	<input type="text"/> ftp.boomi.com
Port	<input type="text"/> 21
Connection Mode	Passive
User Name	<input type="text"/> boomitrain
Password	<input type="text"/> Click to Set

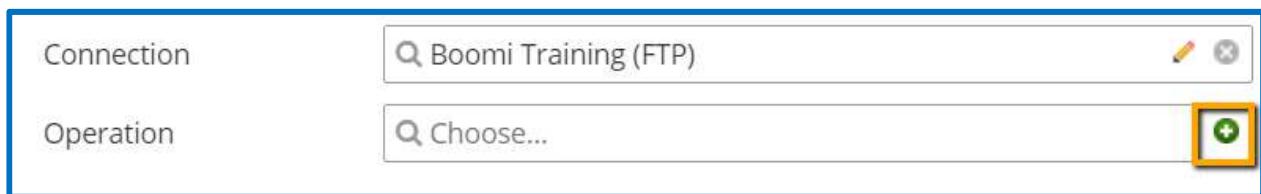
- ✓ *Do NOT change any information in the Boomi Training (FTP) connection component or you will not successfully connect to the Boomi FTP server.*



Exercise 4: Create an FTP Operation

To retrieve the Account documents (in XML format) from the FTP server, you must pair the FTP Operation with the Connection component. This defines the “how,” as in, “How should I retrieve documents from this connection?” Although connections are re-usable, most read operations are exclusive to a single integration because they identify the particular document set needed for the process flow.

1. In the **Start Shape** connector configuration window next to **Operation**, click **Create** (+) to open a new component tab.



2. The **FTP Operation** window appears. At the top of the screen is a field where you can change the Operation Name. Click in the title section and enter **Account XML Get**.



3. After naming the operation, enter the following information:

FTP Action:	Get
Remote Directory:	accounts
File Filter:	Account*
Transfer Type:	Binary
Max Files to Read:	0



Pay special attention to the case and spelling of the Remote Directory and File Filter names. Enter the names exactly as they look in the table above.

Exercise 4: Create an FTP Operation

Account XML Get - FTP Operation [?](#) [Folder](#) [Add Description](#)

Options Archiving Tracking Caching

Connector Action	Get ▾
FTP Action	Get ▾
Remote Directory	accounts
File Filter	Account*
Transfer Type	Binary ▾
Maximum Files to Read	0



The wildcard (*) symbol filters files containing a certain character set. We are filtering all files that have a name beginning with Account (i.e. Account-1.xml, Account-2.xml, etc.).

- At the bottom of the Process canvas, click **Save and Close**.

The Start shape connector now has the Account XML Get operation settings loaded in the configuration.

- Click **OK**.

Start Shape [?](#)

The Start shape is the main shape that begins the Dell Boomi AtomSphere process flow. It is automatically added to each new process and it cannot be removed.

Process Mode General

Type Connector Trading Partner Data Passthrough No Data

General Parameters

Display Name	
Connector	FTP ▾
Action	Get ▾
Connection	<input type="text"/> Boomi Training (FTP)
Operation	<input type="text"/> Account XML Get

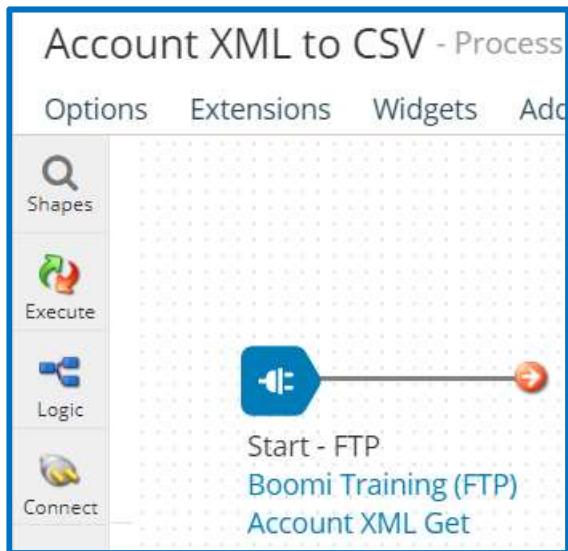
OK **Cancel**

The **Account XML to CSV** process window shows the Start shape with the connector type (FTP),



Exercise 4: Create an FTP Operation

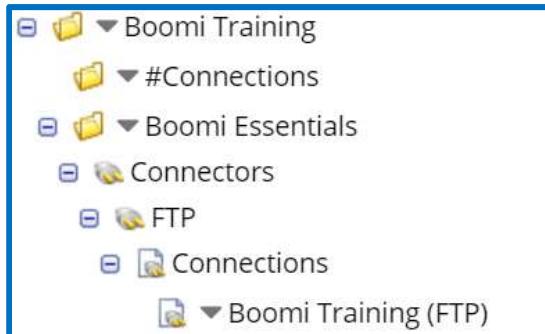
the configured connection (Boomi Training (FTP)), and the operation (Account XML Get).



6. Save the process once the Start shape is configured, and everything will automatically be loaded into the component explorer.

It is a Boomi best practice to store all of your connections into one folder. We have called our common connections folder #Connections. Since our folders will be in alphabetical order, the # will force it to the top.

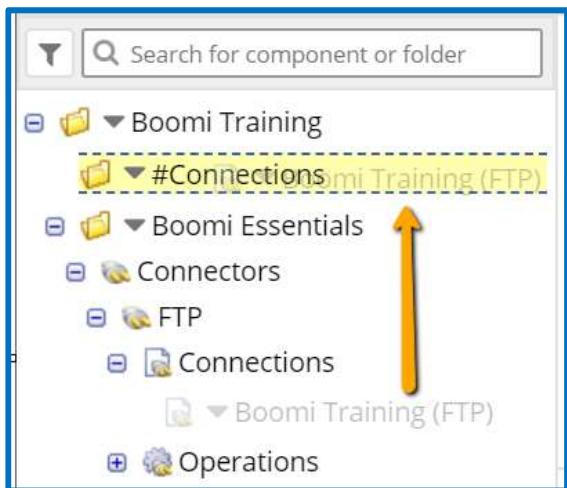
7. Expand the Boomi Essentials -> Connectors -> FTP -> Connections folder.



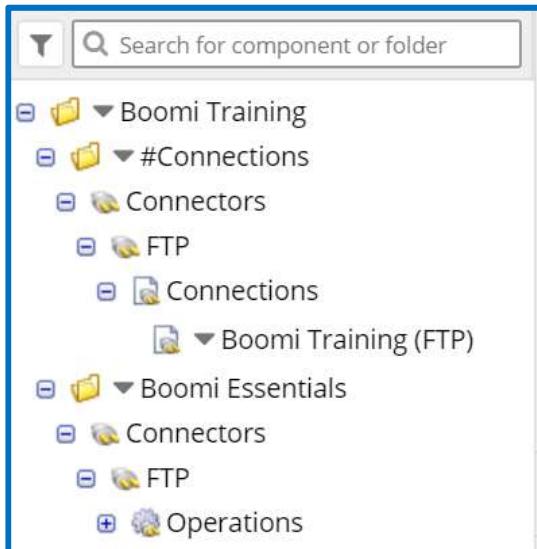
8. Single click on the Boomi Training (FTP) connection and drag it to the #Connections folder.



Exercise 4: Create an FTP Operation



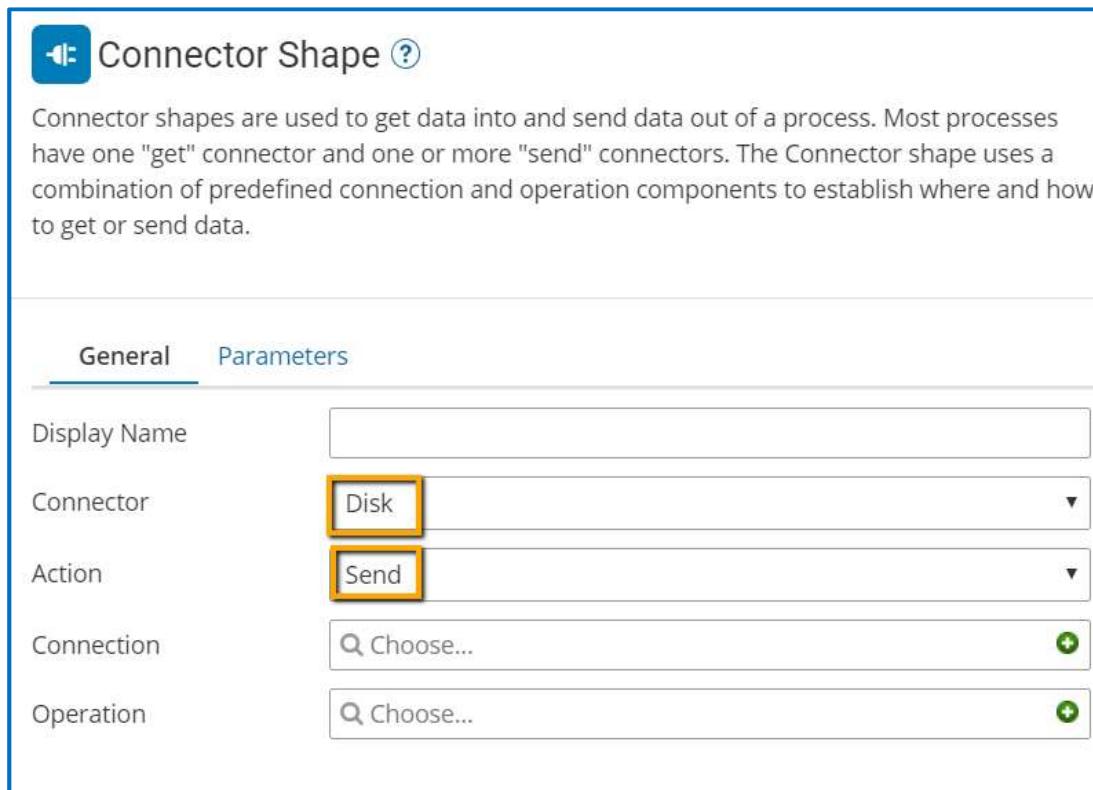
9. Now your folder structure looks like below.



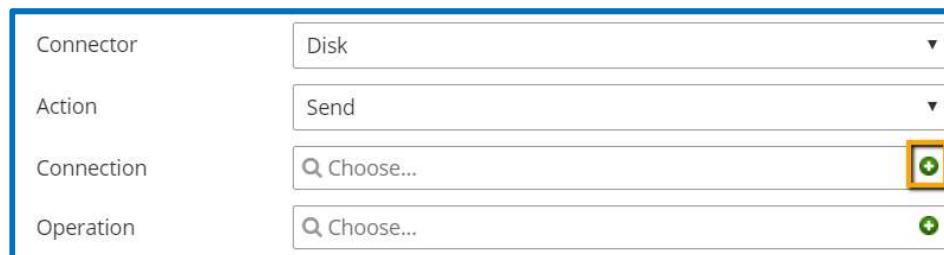
Exercise 5: Access the Disk Connection

As discussed, when developing a new process it is recommended to work from the outside-in. In the last exercise you set up the Start Shape which is one end of the process. It is now time to configure the other end of the process using the Disk Connector Shape.

1. Locate the **Disk Connector** shape on the **Process Canvas** and click it to open the **Disk Connector** shape configuration window.



2. Confirm **Disk** is selected in the Connector drop-down.
3. Confirm **Send** is selected in the Action drop-down.
4. Next to Connection, click **Create** (+) to open a new component tab.

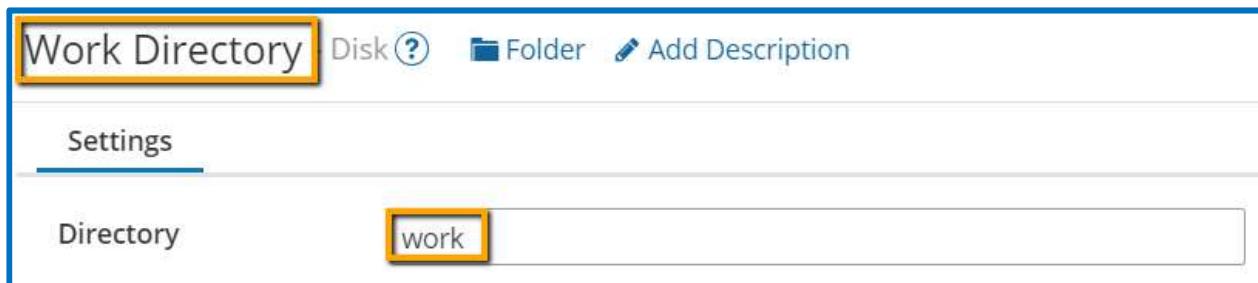


5. In the Name window, enter **Work Directory**.



Exercise 5: Access the Disk Connection

6. For Directory, enter **work** as the location to save the output files.



- ✓ *The files for our training exercises are written to a directory on the Test Atom Cloud. The directory name is spelling and case-sensitive.*

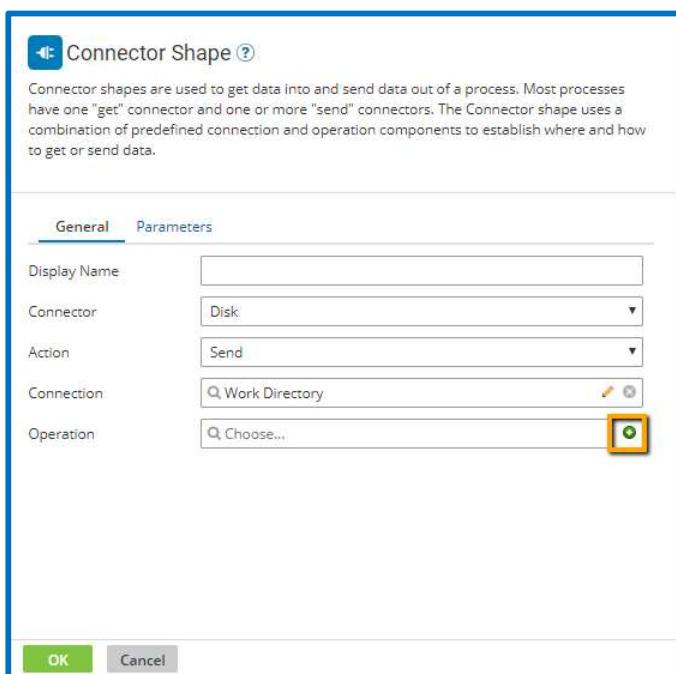
7. Click **Save and Close**.



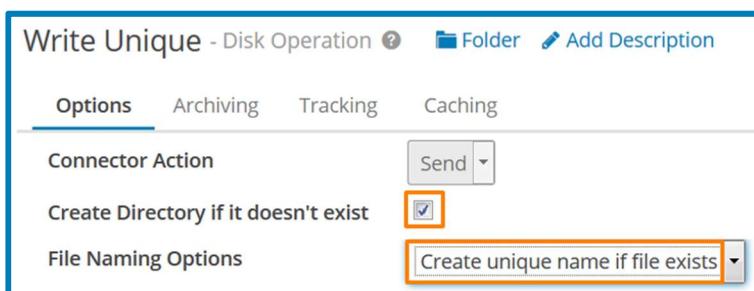
Exercise 6: Create a Disk Operation

To successfully send an outbound document, pair the disk operation with the connection component to show how to build the file(s) and prevent write errors.

1. In the Connection Action window next to the Operation field, click **Create (+)** to open a new component tab.



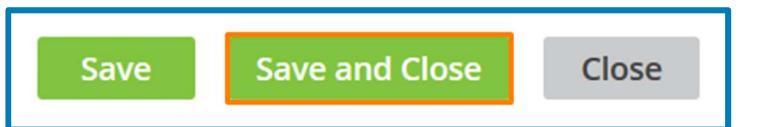
2. In the Name window, enter **Write Unique**.
For Connection Action, **Send** is automatically populated.
Check **Create Directory if it doesn't exist**?
From the File Naming Options drop-down, select **Create unique name if file exists**.



3. Click **Save and Close**.

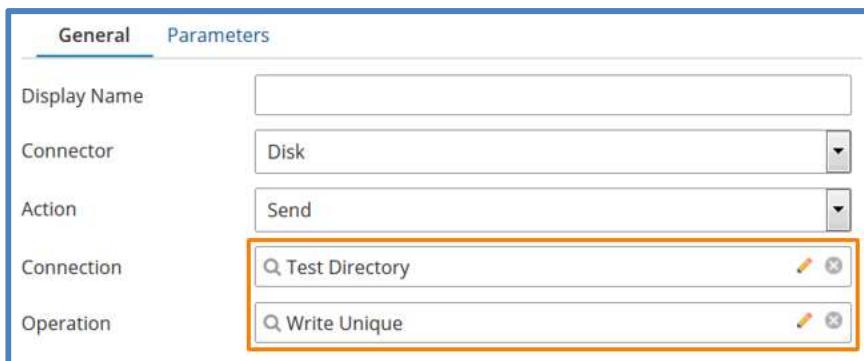


Exercise 6: Create a Disk Operation



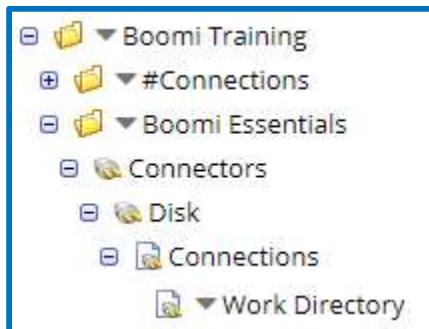
The Connector now has the connection and operation settings loaded into the configuration.

4. Click **OK**.



As mentioned above, it is a Boomi best practice to store all of your connections into one folder, our #Connections folder.

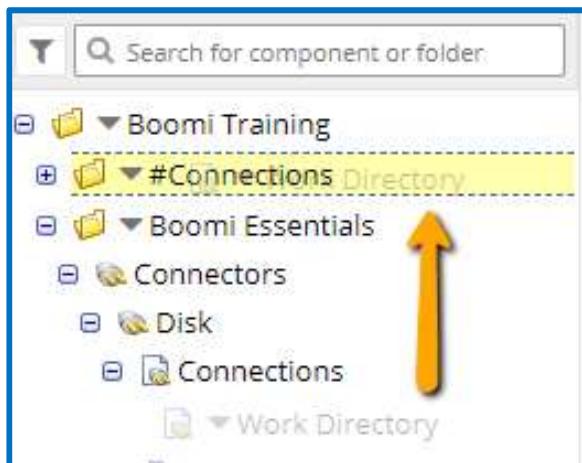
5. Expand the Boomi Essentials -> Connectors -> Disk -> Connectors folder.



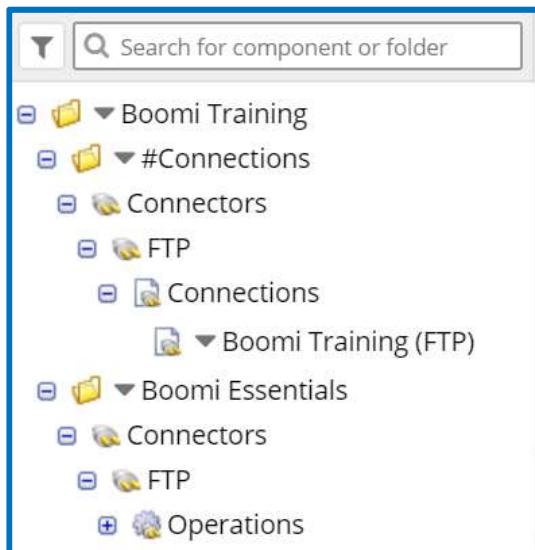
6. Single click on the Boomi Training (FTP) connection and drag it to the #Connections folder.



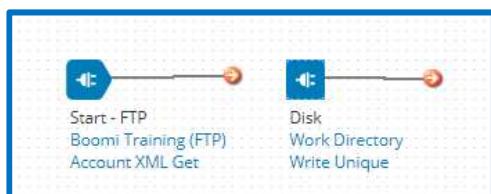
Exercise 6: Create a Disk Operation



7. Now your folder structure looks like below.



The **Account XML to CSV Process** window now shows the connector shape with the connector type (Disk), the configured connection (Test Directory), and operation (Write Unique).

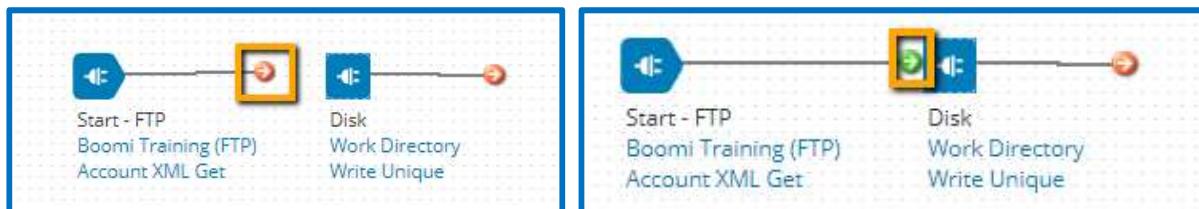


8. Click and drag the **arrow** from the Start shape to the connector.

The arrow turns green when the shapes are connected.



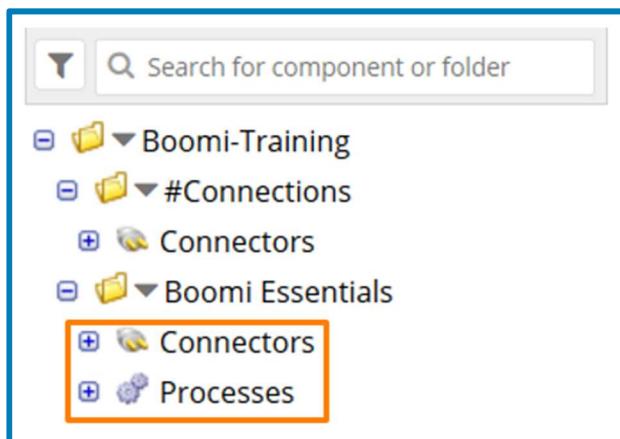
Exercise 6: Create a Disk Operation



9. In the Process tab, click **Save**.

Once the component is saved, a “Saved successfully” message box appears briefly in the lower-right of the process canvas.

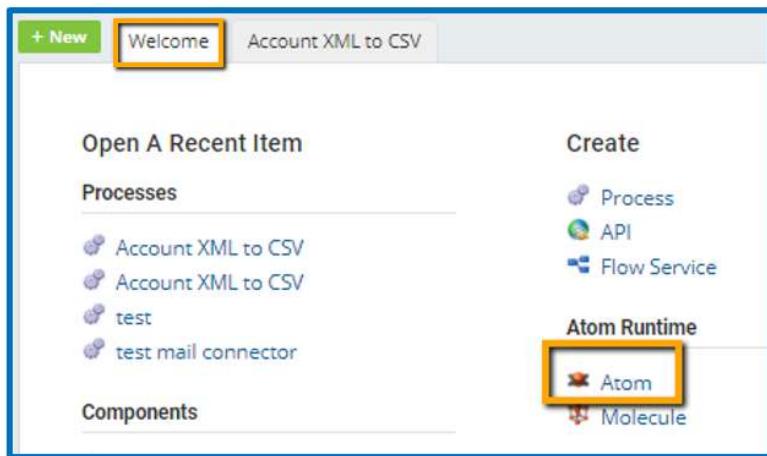
 *After pressing the save button, your connectors are automatically loaded into the component explorer.*



Exercise 7: Enable the Atom Cloud and the Test Atom Cloud

For our class, we will use the Test Atom Cloud to test and execute our processes. We will also set up the Atom Cloud for future class use.

1. Above the Process canvas, click the **Welcome** tab.
2. Under the **Create** column, click **Atom**.



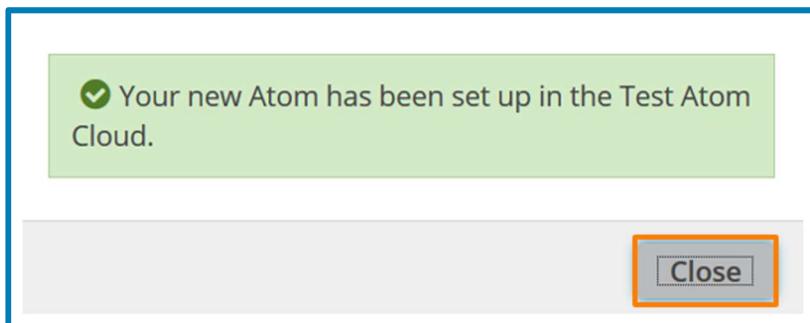
3. Select the **In the Cloud** radio button and choose **Test Atom Cloud** from the drop-down menu.
4. In the box for the Atom Name, type **Test Atom Cloud**.

The screenshot shows the 'Atom Setup' dialog box. It has three main sections: 'Setup Preference' with radio buttons for 'Local' and 'In the Cloud' (the latter is highlighted with an orange box), 'Choose a Cloud' with a dropdown menu showing 'Test Atom Cloud' (also highlighted with an orange box), and 'Atom Name' with an input field containing 'Test Atom Cloud' (highlighted with an orange box). At the bottom right are 'OK' and 'Cancel' buttons.

5. Click **OK**.
- A message confirms "Your new Atom has been set up in the Test Atom Cloud."
6. Click **Close**.



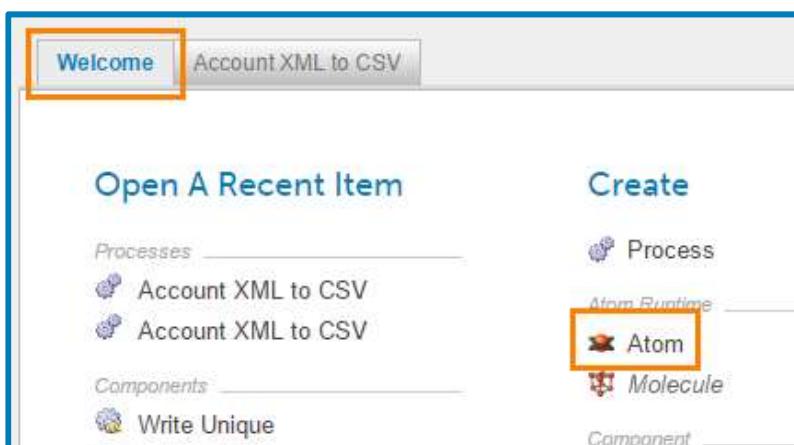
Exercise 7: Enable the Atom Cloud and the Test Atom Cloud



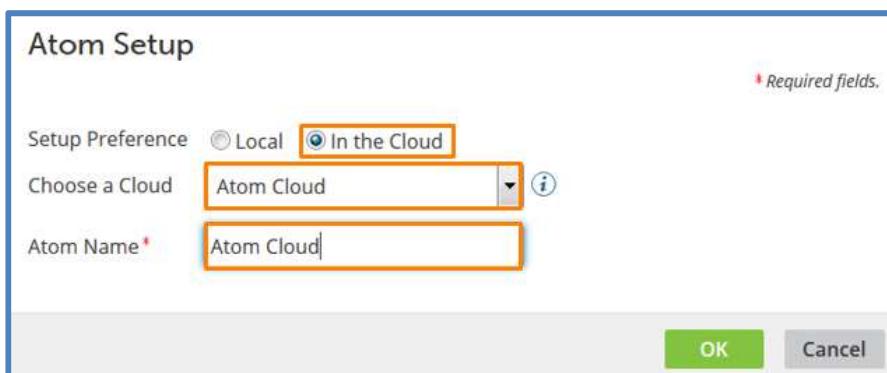
The Test Atom Cloud is now available for test environments.

Repeat the previous steps to set up the Atom Cloud.

7. Once again, click on **Atom** to set up your new Atom.



8. Select the **In the Cloud** radio button and choose **Atom Cloud** from the drop-down menu.
9. In the box for the Atom Name, type **Atom Cloud**.

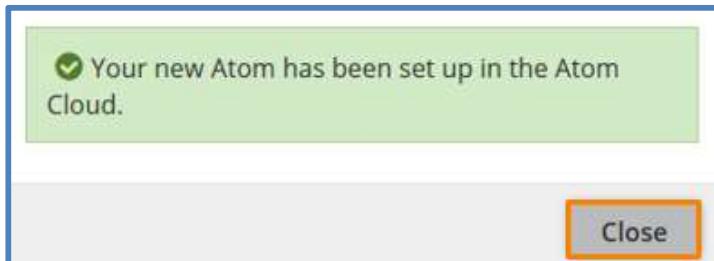


10. Click **OK**.

Exercise 7: Enable the Atom Cloud and the Test Atom Cloud

A message confirms “Your new Atom has been set up in the Atom Cloud.”

11. Click **Close**.



Exercise 8: Test the Process

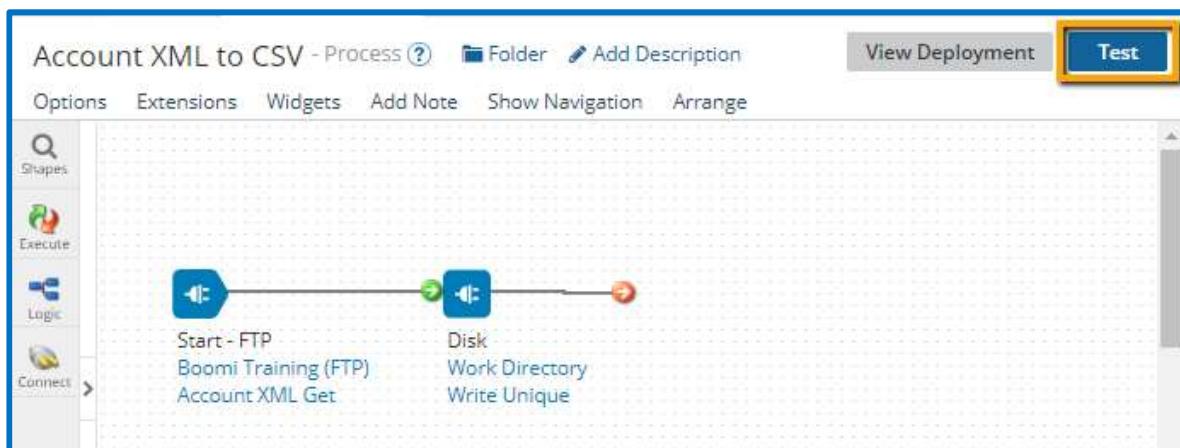
To debug process errors, and to test your process during development, use the Test Mode feature on the Build tab. This function executes and displays real-time results of the processed documents by clicking on each shape to check the logs and current data contents.

Test Mode has limited amounts of data and/or files it can filter.

The limits are 100 documents from a given connector call and 10 MB of total data.

Checking the Accounts XML to CSV Process loads the process in the Process window

1. On the Build tab, click **Test** in the upper-right above the Process canvas.



2. Choose the **Test Atom Cloud** from the drop-down.



3. Click **Run Test**.

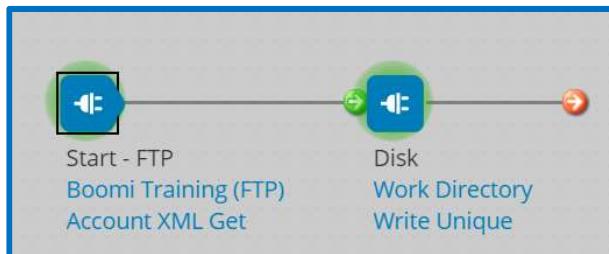
- ✓ During the test, the shape being processed has a yellow circular highlight. This helps to keep track of the process flow through the test execution run.



Exercise 8: Test the Process



After the shape has successfully completed, the circular highlight turns green and a success message displays in the lower-right of the Test Results window.



4. To verify the file is successfully loaded, click the **Connection Data** tab within the Test Results section located beneath the tested process. You can also click the **View the contents of this document** symbol in the far left of the Test Results window to see the physical document.

View the contents of the generated documents in the Document Viewer.

1. In the Test Results window, click on the **Disk Connector** shape.
2. Highlight each of the files in the **Documents** window.
3. In the **Connection Data** tab, click the **View** symbol to view file contents.

Documents		Test Results		
#	Logs	Shape Source Data	Connection Data	
1				C:\Boomi AtomSphere\Ator 1523883719668.dat
2				

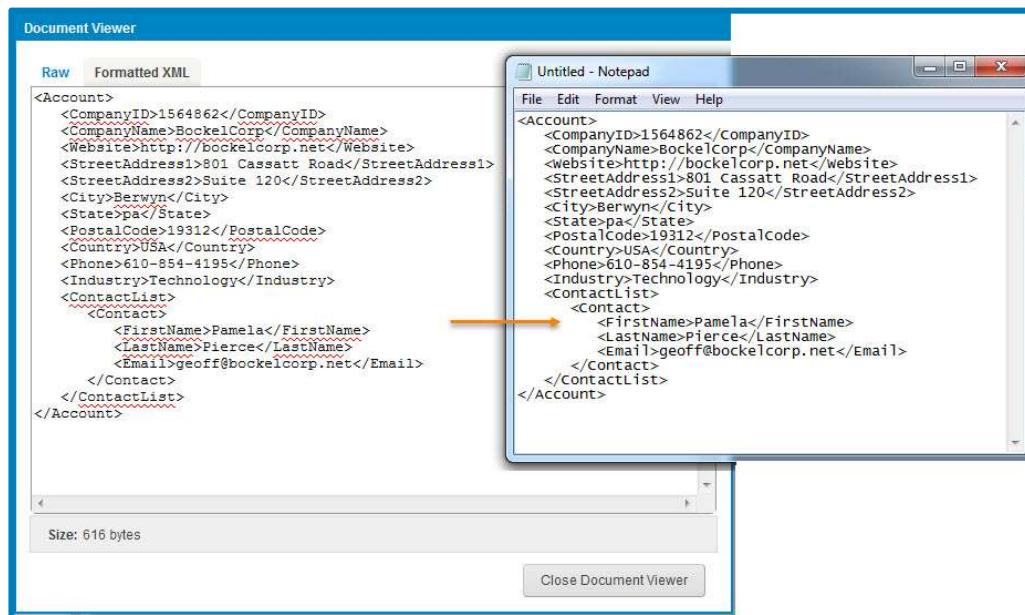


The file is in the work directory of the Test Atom Cloud, so you need to use the Document Viewer to see the file contents. You do not have access to the physical directory. To save the contents of the file to your physical drive, download the file or

Exercise 8: Test the Process

copy and paste the contents from the Document Viewer to a text editor, such as Notepad, and save it.

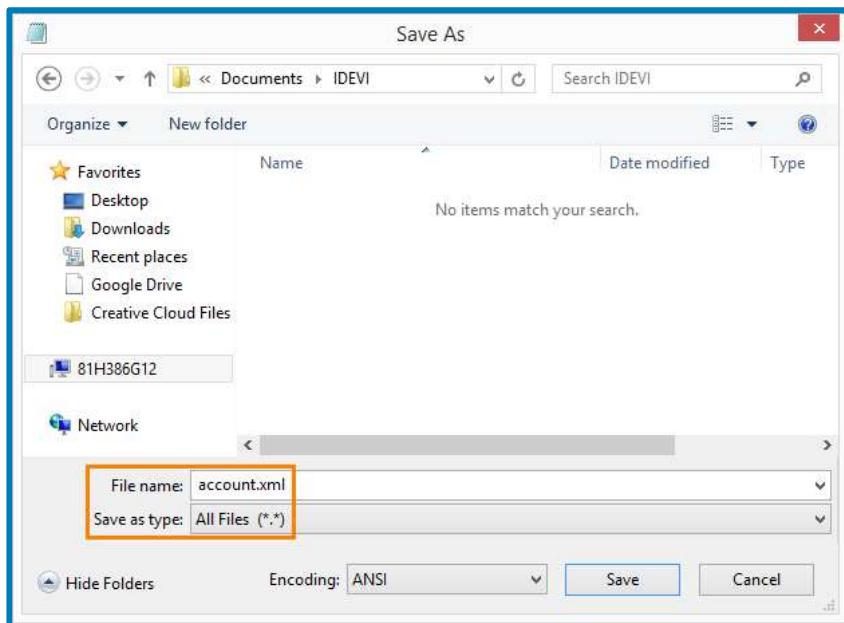
4. Select and **Copy** the entire contents.
5. Open a **Text Editor**, such as Notepad, and paste the contents. We will use it later to create an XML profile. The following example uses NotePad:



6. Save the document as **account.xml** in a local directory on your computer.
7. For **Save as Type**, choose **All Files**.



Exercise 8: Test the Process



If using a Local Atom, the files are written to the local directory defined in the disk connector. View the results by opening the files from within the specified output directory

- When finished, click **Close Document Viewer**, and in the upper-left corner of the Process canvas, click the **Return to Edit Mode** arrow symbol.



Process: Account XML to CSV ▾



The reason we saved the document output is to use the format of the document to structure something we call a **Profile**. You will create a **Profile** in the next activity and will reference the **account.xml** file you just created.

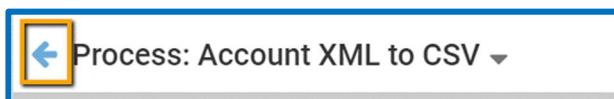


Exercise 9: Create an XML Profile

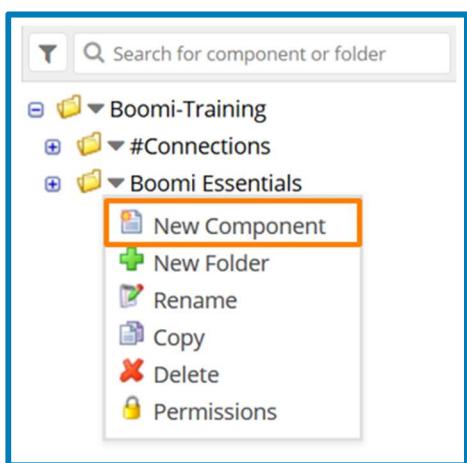
To reference data in a field structure, it is important to build a profile component to represent the expected format of the source or destination data. This allows you to translate and validate fields and to set properties to dynamically name the file for each unique document.

Create an XML Profile component in the *Boomi Essentials* folder

1. If you are not in Edit Mode on the process canvas, click the **Return to Edit Mode Arrow** in the upper-left.



2. From the Component Explorer, in the Boomi Essentials folder click the blue drop-down arrow and select **New Component**.



The Create Component window expands above the Process Canvas. You need to choose the component type, enter the name, and destination of the New Component. Note the file path for the component is automatically populated in the destination field since you created your component through the Boomi Essentials folder.



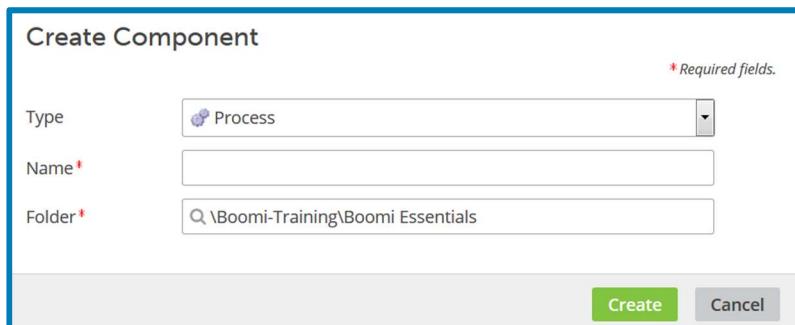
Exercise 9: Create an XML Profile

Create Component

* Required fields.

Type	<input type="button" value="Process"/>
Name *	<input type="text"/>
Folder *	<input type="text"/> \Boomi-Training\Boomi Essentials

Create **Cancel**



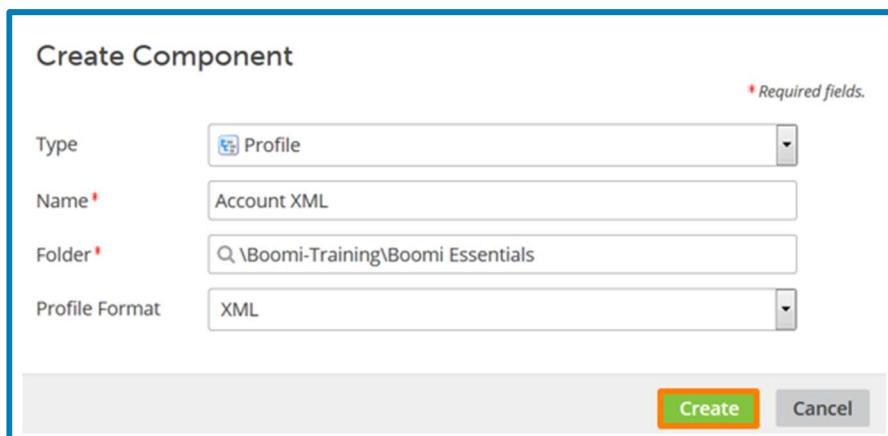
3. For Component Type, select **Profile**.
4. For Profile Name, enter **Account XML**.
5. For File Type, select **XML**.

Create Component

* Required fields.

Type	<input type="button" value="Profile"/>
Name *	<input type="text"/> Account XML
Folder *	<input type="text"/> \Boomi-Training\Boomi Essentials
Profile Format	<input type="button" value="XML"/>

Create **Cancel**



6. Click **Create**.
The Account XML tab is now selected.
7. Click either the blue **Import** button or the green **Import a Profile** button.



Exercise 9: Create an XML Profile

The screenshot shows a web-based interface for managing XML profiles. At the top, there's a header with "Account XML - XML Profile" and options like "Folder" and "Add Description". On the right, there's a blue "Import" button. Below the header, a section titled "Getting Started XML Profiles" contains text about XML profiles and an "Import a Profile" button.

This will launch the XML Import Wizard.

The screenshot shows the first step of the XML Import Wizard. It has a title bar "XML Import Wizard". Under "Build XML Profile from", the radio button for "XML File" is selected. Below it, there's a "File" input field containing "account.xml" and a "Browse..." button.

8. On **Build XML Profile from:** select **XML File**.
9. Click **Browse**, navigate to your local directory, and select the **account.xml** file saved earlier.
10. Click **Next**.

The screenshot shows the second step of the XML Import Wizard. It has a title bar "XML Import Wizard". Under "Build XML Profile from", the dropdown menu is set to "XML File". Below it, there's a "Select File To Upload*" section with a "Choose a File" button and an input field showing "Account.XML". At the bottom, there are "Cancel" and "Next" buttons.

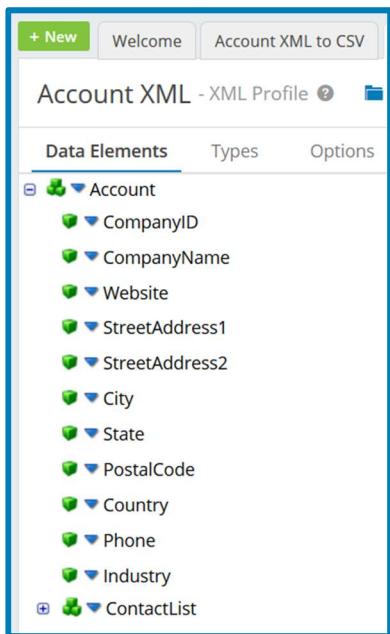
The XML Import Wizard displays the profile is loaded.

11. Click **Finish** to close the Wizard.

The list of imported fields displays.



Exercise 9: Create an XML Profile



The screenshot shows the 'Account XML - XML Profile' interface. At the top, there are tabs for '+ New', 'Welcome', and 'Account XML to CSV'. Below the tabs, the title 'Account XML - XML Profile' is displayed with a help icon and a folder icon. The main area has three tabs: 'Data Elements' (which is selected and underlined), 'Types', and 'Options'. Under 'Data Elements', there is a tree view of data elements:

- Account
 - CompanyID
 - CompanyName
 - Website
 - StreetAddress1
 - StreetAddress2
 - City
 - State
 - PostalCode
 - Country
 - Phone
 - Industry
- ContactList

12. Click **Save and Close**.

You now have an XML profile to use during our upcoming Set Properties Shape activity.

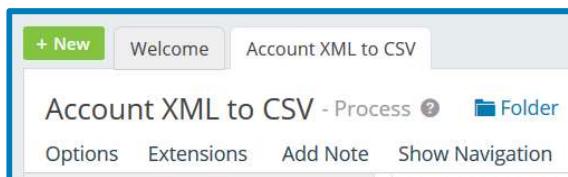


Exercise 10: Set a File Name and Test the Process

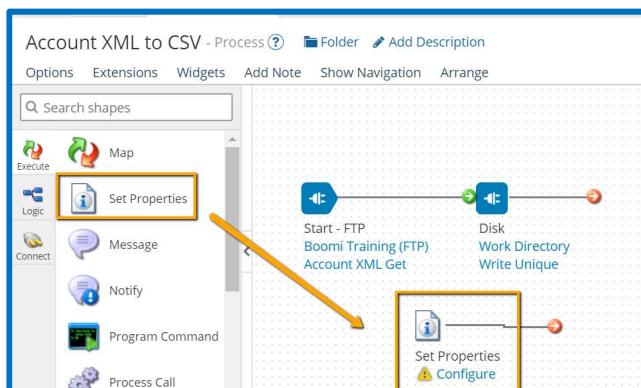
In the previous exercise, we created the profile used in this exercise. We will use the Set Properties shape to change the default file name into a more meaningful filename.

In this exercise, we will configure a Set Properties shape to change the file name using a mix of static and dynamic parameters. Remember, static values apply the same value to each document and dynamic values reference elements in a profile to use the data in said element.

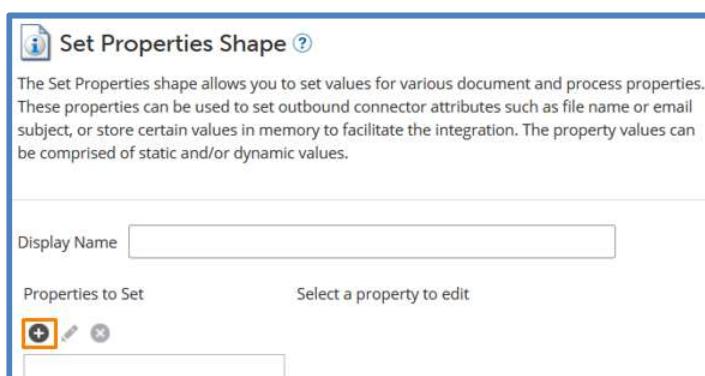
1. Navigate to the Process canvas by clicking the **Account XML to CSV** tab.



2. Click on the **Execute** Tab and drag-and-drop it on the Process Canvas.



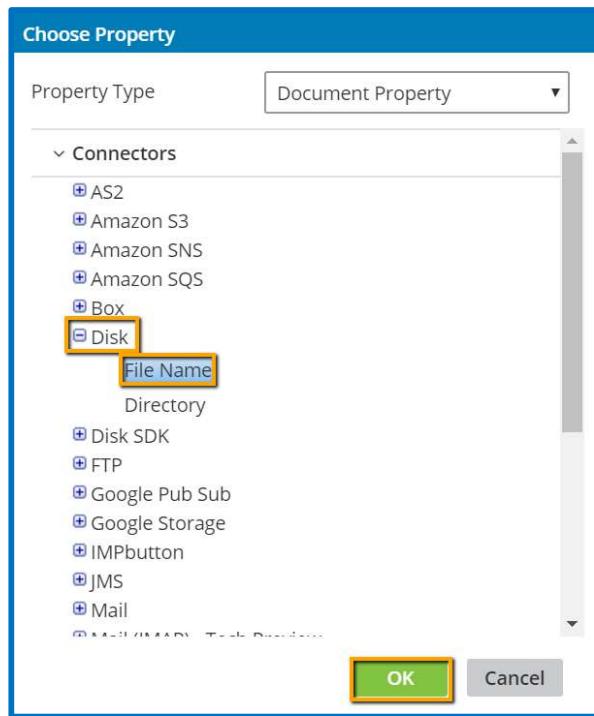
3. Click on the **Set Properties** shape to open the configuration window.
4. Click on the plus symbol under the **Properties to Set** column to add a new property



Exercise 10: Set a File Name and Test the Process

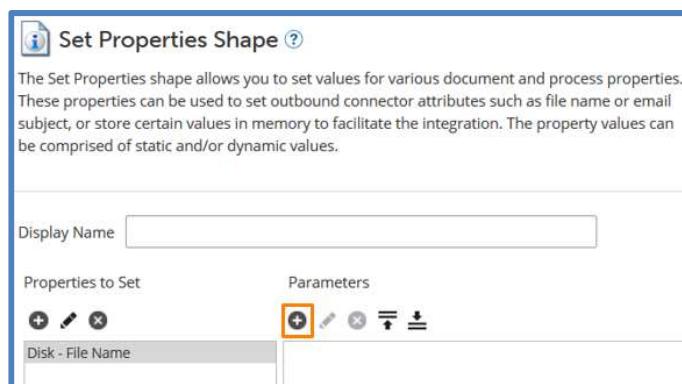
The Choose Property window appears where you can choose the property to set.

5. Click the plus symbol next to the **Disk** Connector option and choose **File Name**. Once complete, click **OK**.



Notice under the Properties to Set column it now says **Disk-File Name**.

6. It is now time to set the Parameters, by clicking on the plus symbol under the **Parameters** column.



The Parameter Value window now appears.

7. Within the Parameter Value window, select **Profile Element** from the **Type** drop-down menu.

This option allows you to choose a profile to link to for our dynamic values.

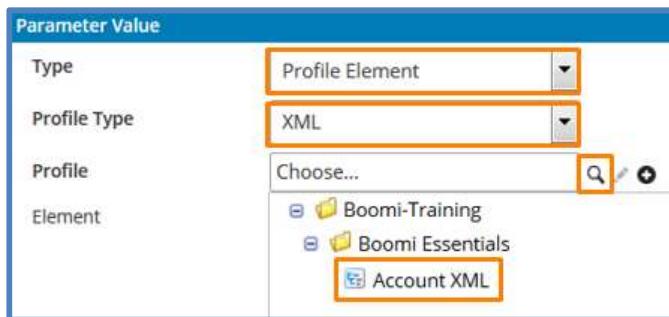


Exercise 10: Set a File Name and Test the Process

8. In the **Profile Type** drop-down menu, select **XML**.

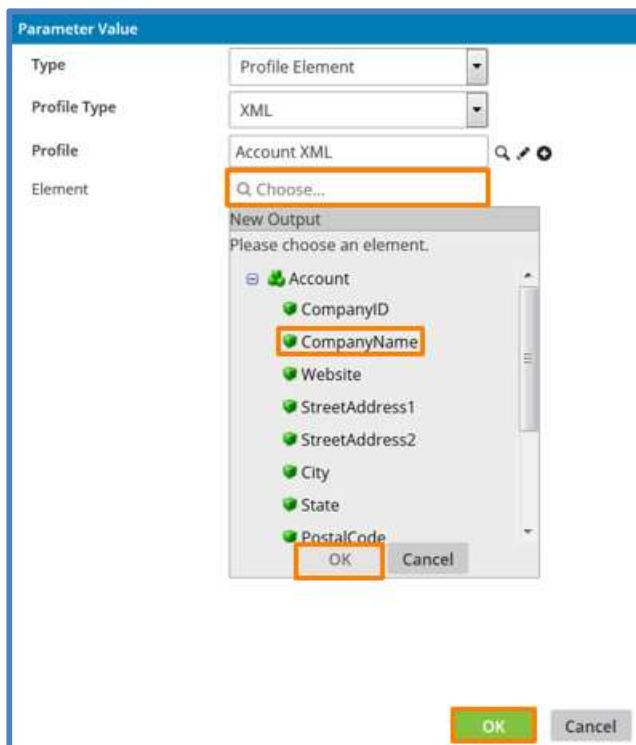
This option filters out any non-XML profiles from the following **Profile** field.

9. Click the **Magnifying Glass** to search your component explorer for your desired profile. Click the **Account XML** profile you created earlier.



10. Click in the Element field where it says **Choose** to select an Account XML profile element. Select **CompanyName** and click the **Grey OK**.

11. Then click the **Green OK**.



It returns to the Set Properties Shape configuration window to both the Properties to Set column, and the Parameters column look like the image below.

Exercise 10: Set a File Name and Test the Process

The screenshot shows the 'Set Properties Shape' configuration window. It includes a description of the shape's function, a 'Display Name' input field, and two sections for 'Properties to Set' and 'Parameters'. The 'Properties to Set' section contains a table with one row: 'Disk - File Name' under 'Properties to Set' and 'XML Profile - Account XML - CompanyName (Account/CompanyName)' under 'Parameters'. Both columns have edit icons.

Properties to Set	Parameters
Disk - File Name	XML Profile - Account XML - CompanyName (Account/CompanyName)

The dynamic document property is now set, and the filename of each document passing through this shape reflects the data flowing through the CompanyName field from your Account XML profile. We will now add a static value of ".xml" to the end of the filename.

12. To add a static value to your existing filename, you do not need to add a new Property to Set. You only need to add another parameter to the existing property, by clicking on the plus symbol under the Parameters column.

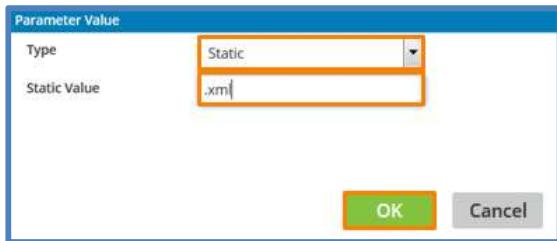
The screenshot shows the 'Set Properties Shape' configuration window. It includes a description of the shape's function, a 'Display Name' input field, and two sections for 'Properties to Set' and 'Parameters'. The 'Properties to Set' section contains a table with one row: 'Disk - File Name' under 'Properties to Set'. The 'Parameters' section contains a table with one row: 'XML Profile - Account XML - CompanyName (Account/CompanyName)' under 'Parameters'. The 'Parameters' section has a toolbar with several icons, and the first icon (a plus sign) is highlighted with a red box.

Properties to Set	Parameters
Disk - File Name	XML Profile - Account XML - CompanyName (Account/CompanyName)

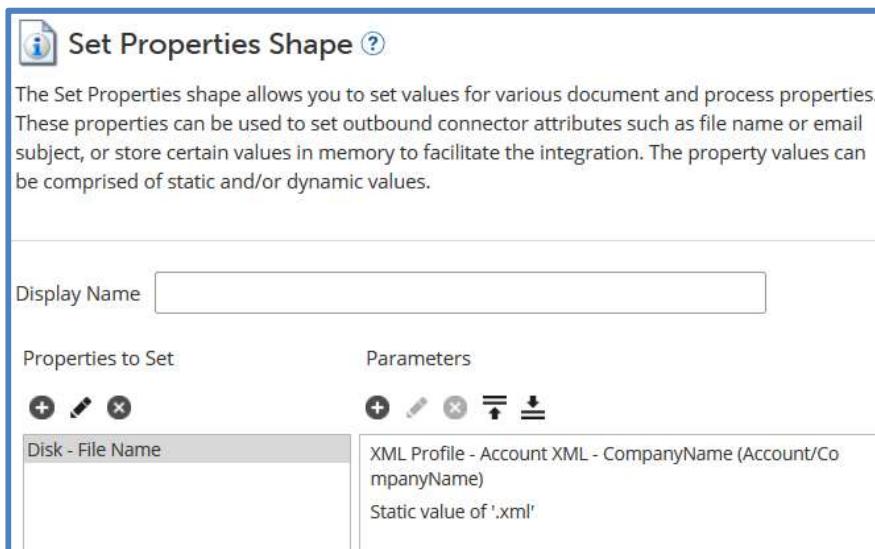
13. In the Parameter Value window keep the default Type of **Static** and type **.xml** into the Static value field. Click **OK** when complete.



Exercise 10: Set a File Name and Test the Process



The completed Set Properties Shape looks like the image shown below:



14. Click **OK** to return to the process canvas once the Set Properties Shape is correctly configured.

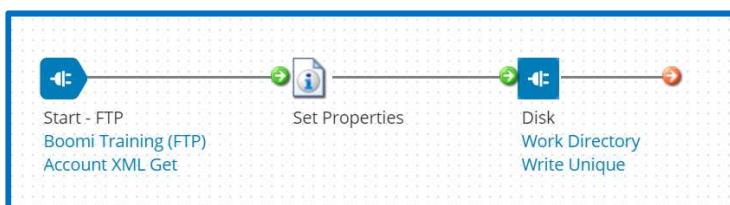
The Set Properties Shape is now complete, and it is time to insert it into your process to verify the filename has changed.

15. First, detach your Start Shape from your Disk Connector shape.

16. Then, connect the Start Shape to your Set Properties Shape.

17. Finally, connect your Set Properties Shape to your Disk Connector Shape.

The result should look like the image below:



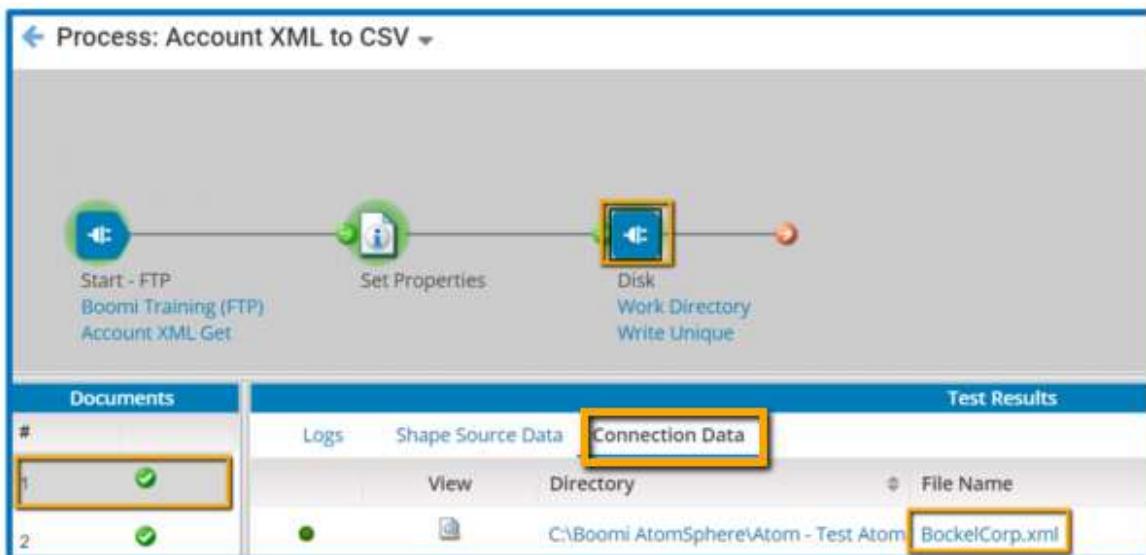
18. Run the process in test mode and view the results. You will be able to verify the file name has changed by clicking on the Disk Connector Shape in test mode.



Exercise 10: Set a File Name and Test the Process

19. Then select a document in the Documents Tab.
20. Select Connection Data in the Test Results Tab
21. Look for the file name under the File Name Column.

The filename should match the file name noted in the following image.



It is important to understand the parameter order. The name is built from top to bottom in the parameter list, so our name is “CompanyName.xml” since the file extension is last in the list.

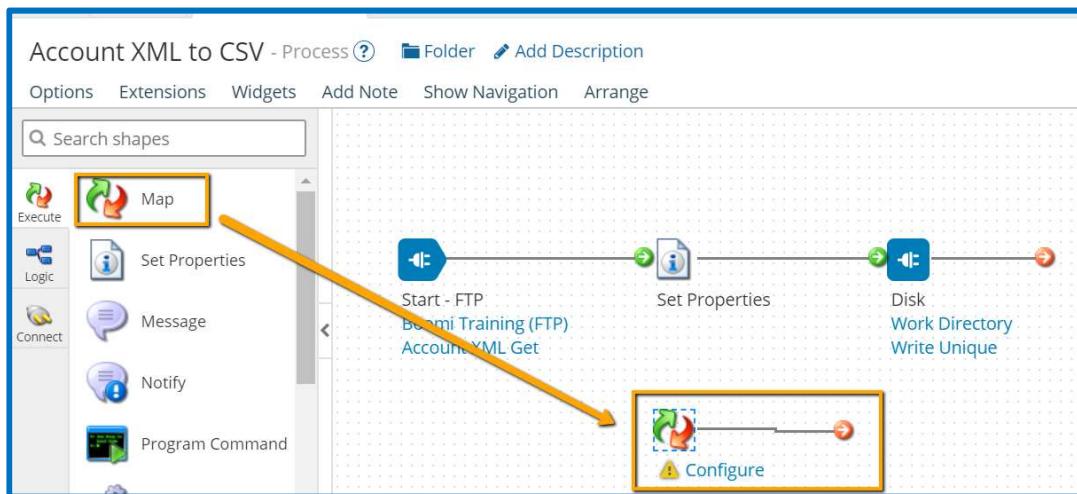


Exercise 11: Create a Map and Source Profile

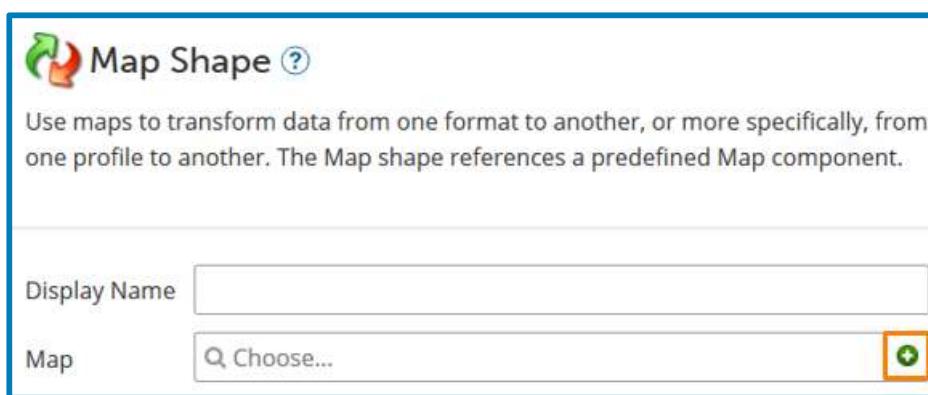
The archive workflow is now created to store the original XML documents with a unique filename, so now you need to create a data map to translate the source XML content to a CSV type. The map component converts different document types and applications at the field-level.

1. Open the **Account XML to CSV** Process.
2. Drag and drop a **Map** shape on the Process canvas.

The Map Properties window opens automatically. Place the Map shape below the process path.



3. In the Map Properties window, click the **Create a new component** (+) symbol to open a new map.



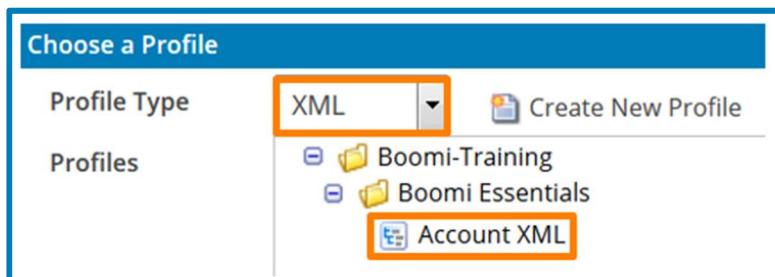
4. In the Name window, enter **Account XML to CSV**.
5. In the left mapping pane, click the **Choose** to choose the source profile.



Exercise 11: Create a Map and Source Profile

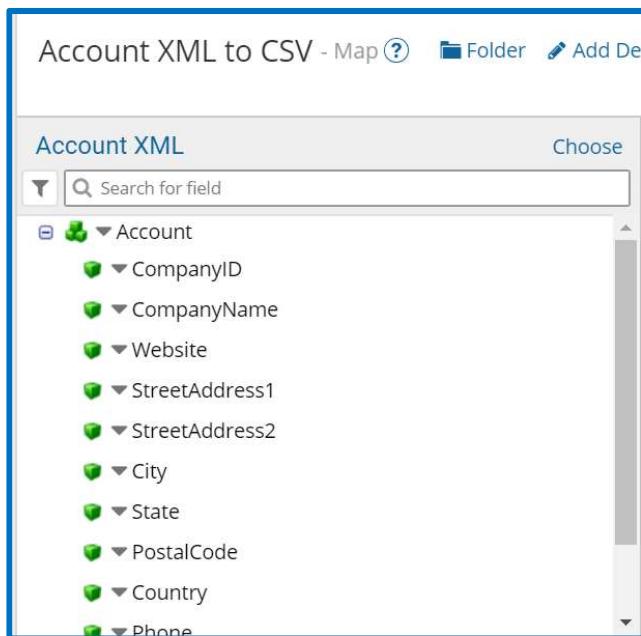


The **Choose a Profile** window opens.



6. For Profile Type, select **XML**.
7. Select the **Account XML** profile created earlier.
8. Click **OK**.

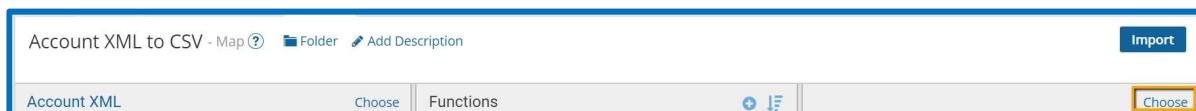
The generated field list appears in the left mapping window.



Exercise 12: Create a Flat File Destination Profile

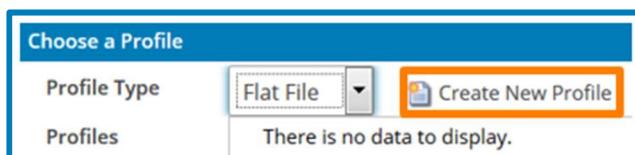
You have created the map to handle the translation piece of the process and now need to configure a profile component to define the field structure of the destination data. The Flat File Profile supports the creation and parsing of multiple record types within a single file. This exercise demonstrates how to create a new profile from within the mapping and how to manually build a field set with a comma delimiter.

1. In the right mapping pane, click **Choose** to create the destination profile.

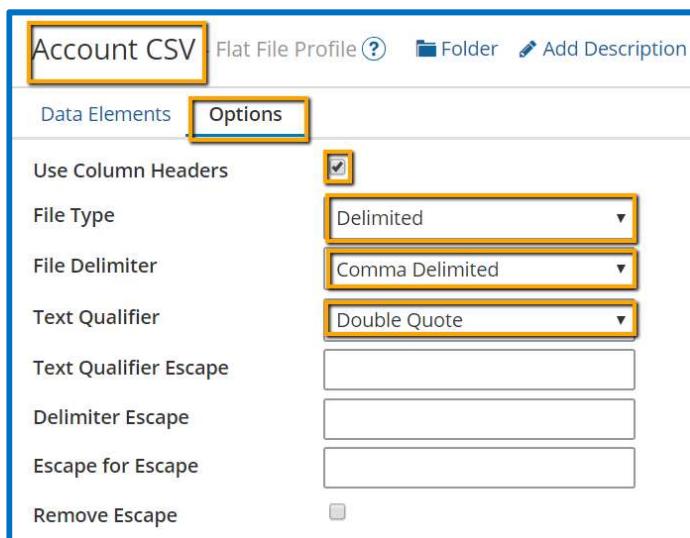


The **Choose a Profile** window opens.

2. For Profile Type, select **Flat File**.
3. Click the **Create New Profile** link.



4. In the Flat File Profile Name field, enter **Account CSV**.
5. Click the **Options** tab.



6. Configure the following options:



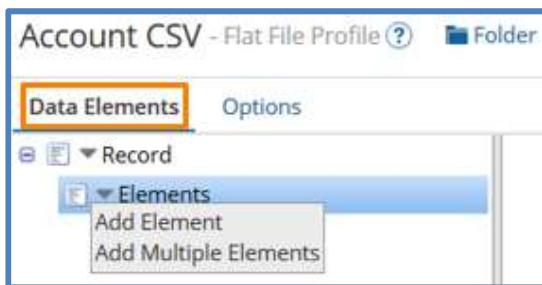
Exercise 12: Create a Flat File Destination Profile

Use Column Headers:	Checked
File Type:	Delimited
File Delimiter:	Comma Delimited
Text Qualifier:	Double Quote



A double quote text qualifier handles data belonging to a particular field containing a comma but is not interpreted as a separate data element. For example, "123 Adams Road, Suite 400" ignores the comma so the entire address is belongs to the address field.

7. Click the **Data Elements** tab.
8. Next to **Elements**, click the blue drop-down arrow and then select **Add Multiple Elements**.



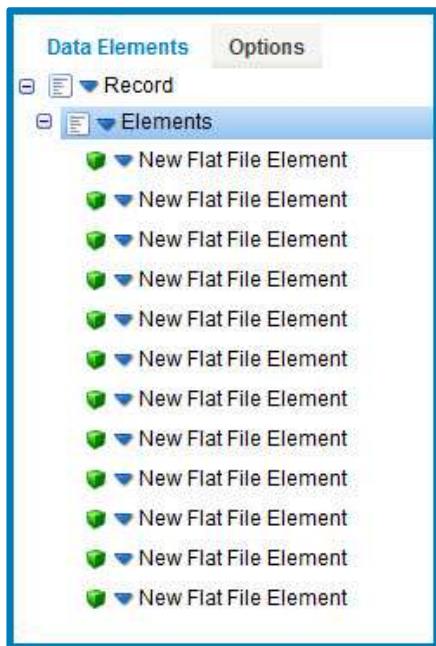
9. When prompted for the number of elements, enter **12**, then click **OK**.
 - ✓ In addition to entering the number, use the up/down arrows next to the entry field to increment a single digit.



10. Click **OK**.
The flat file data elements can now be populated.



Exercise 12: Create a Flat File Destination Profile



Rename each of the *New Flat File Element* elements

1. Click on the first **New Flat File Element**.
An options panel opens on the right.
2. For the first element, in the **Data Name** field, type **AccountID**.
The name updates automatically in the Data Elements list on the left.

A screenshot of a software interface showing a 'Data Elements' list. At the top, there are tabs for '+ New', 'Welcome', 'Account XML to CSV', 'New Map', and 'New Flat File Profile'. Below these are sections for 'Record' and 'Elements'. The 'Elements' section is expanded, showing various fields like 'AccountID', 'AccountName', 'Industry', etc. To the right of the list is a properties panel for the selected 'AccountID' element. The 'Data Name' field is highlighted with an orange box and contains the value 'AccountID'. Other properties shown include 'Position' (1), 'Mandatory' (unchecked), and 'Enforce Unique' (unchecked). There are also buttons for 'Field Size Options' and 'Data Format Options'.



Exercise 12: Create a Flat File Destination Profile

3. After entering **AccountId** as the first element, name the remaining 11 **New Flat File Elements** using these field names:

AccountName

Industry

Address1

Address2

City

State

Zip

Country

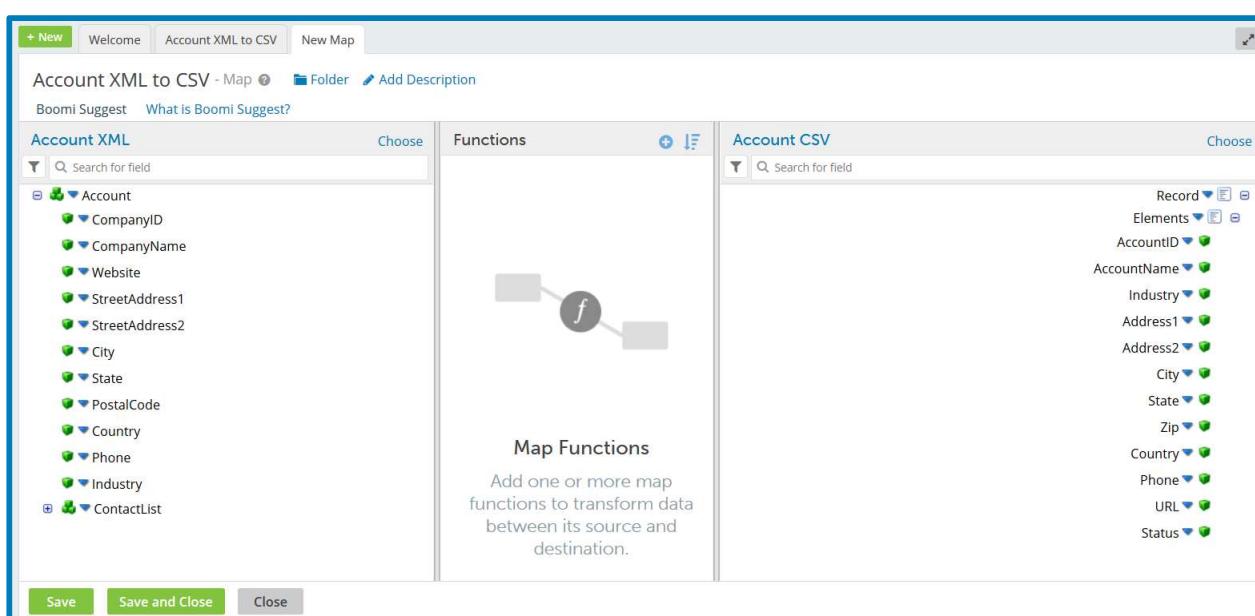
Phone

URL

Status

4. Click **Save and Close**.

5. On the **Map** screen's right mapping window, next to **Elements**, click the **Expand (+)** symbol to expand the element list to view the entered file elements.



6. Click **Save**.



Exercise 13: Map Fields

Both sides of the mapping interface are now populated with a field list. To map the fields, link the fields using either Boomi Suggest or manually drop and drag source field names (on the left) to matching destination field names (on the right) to create map links.

1. Click on the **StreetAddress1** element and drag it to the **Address1** element to drop it. The selected destination element highlights in green.
2. Continue dragging and dropping elements until mapped, or use **Boomi Suggest**. Using the table below, verify all fields are mapped correctly.

The screenshot shows the Boomi Map interface with three panels: 'Account XML' (source), 'Functions' (center), and 'Account CSV' (destination). The 'Boomi Suggest' button is highlighted in orange at the top left. In the source panel, 'StreetAddress1' is selected and has a blue line connecting it to 'Address1' in the destination panel. Other fields like CompanyID, CompanyName, Website, StreetAddress2, and City are also listed in the source panel.



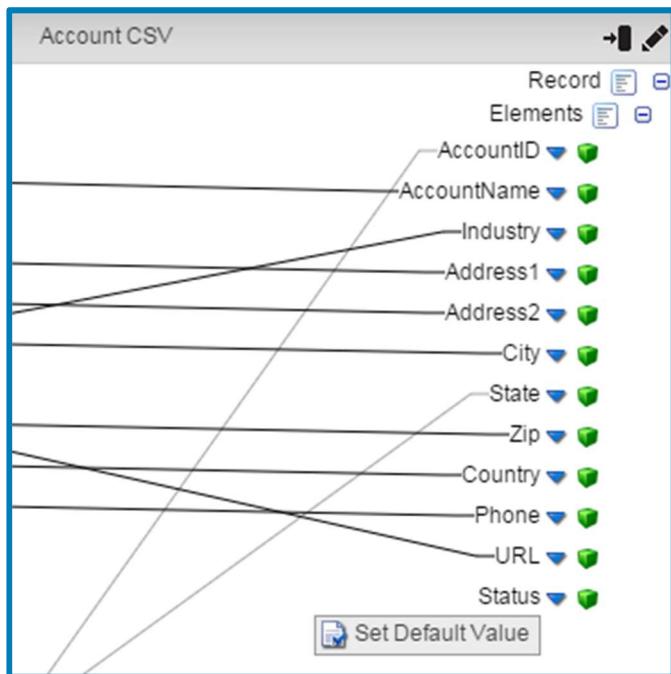
Boomi Suggest provides a quick alternative to manually mapping fields by offering mapping suggestions based on thousands of mappings logged in the Boomi community.

- ✓ *Boomi Suggest may not suggest the correct mapping of a field, so you must verify all mappings completed with the tool to make sure the mapping is correct. You can always manually map or un-map a field.*

SOURCE	DESTINATION
CompanyID	AccountID
CompanyName	AccountName
Website	URL
StreetAddress1	Address1
StreetAddress2	Address2
City	City
State	State
PostalCode	Zip
Country	Country
Phone	Phone
Industry	Industry

3. In the Account CSV Records next to the Status field name, click the blue drop-down arrow and select **Set Default Value**.

Exercise 13: Map Fields



4. For Value, enter 1.



5. Click **OK**.

The Status field name changes to Status (1) showing the default value entered.



- ✓ Assume the outbound CSV document for this scenario requires the Status is auto-set to 1 for reporting purposes.

 The Default Value displayed in the outbound data when the destination element is null, blank, or unmapped.

6. Click **Save**.



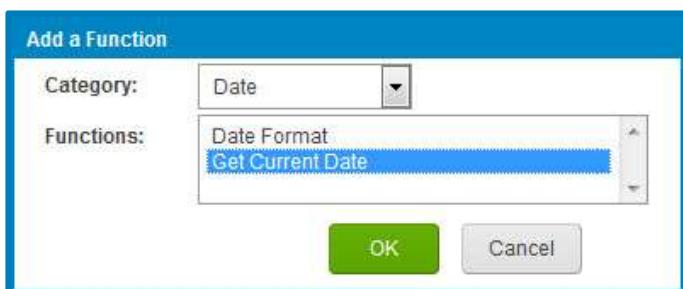
Exercise 14: Add Get Current Date Map Function

When building integrations between different applications and resources, many fields need adjustments to meet destination system/vendor specifications. The map function library offers several ways to apply conversion logic to fields being mapped. This includes cases where information is not present in the source data. This exercise shows how to do a runtime date/time lookup so the output has the run date/time.

1. In the **Function** (middle) window, click the plus sign to add a new function.

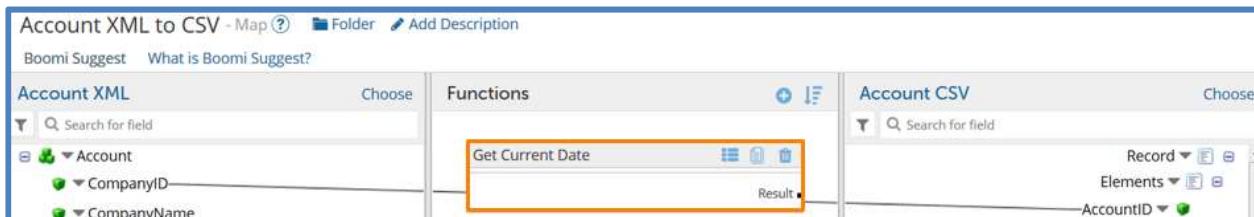


2. From the drop-down next to **Category**, select **Date**.
3. Highlight **Get Current Date** and then click **OK**.



The Get Current Date function opens in the Functions window. The value **Result** holds the current date retrieved from the function.

To map the result to the destination field in our Account CSV profile, create a new field to house this data.

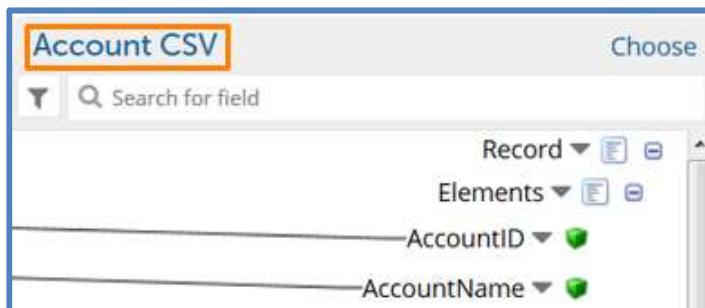


To add a new field to the destination profile

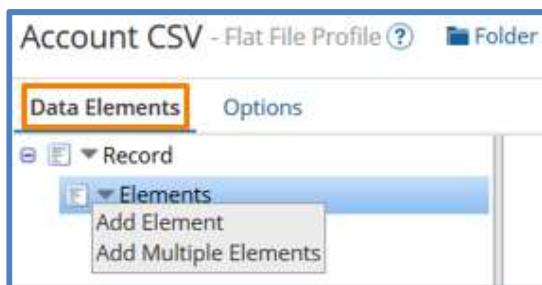


Exercise 14: Add Get Current Date Map Function

1. In the Account CSV destination pane, click the **Account CSV** title to edit the profile.



2. Click the blue drop-down arrow next to **Elements**, then select **Add Element**.



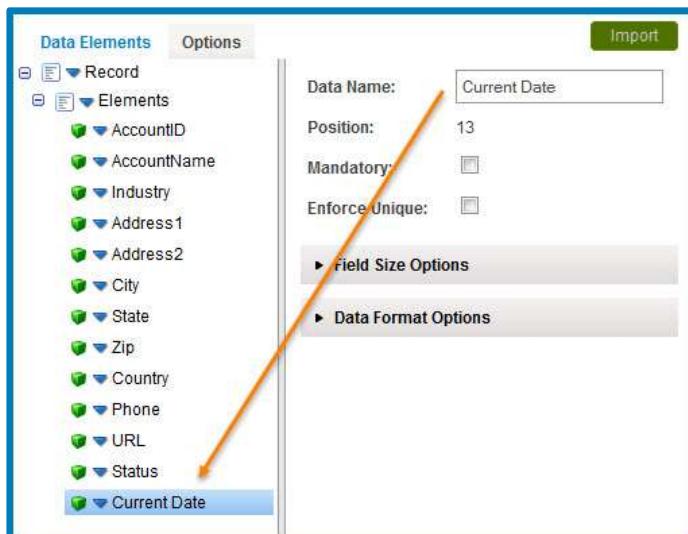
The list of Data Elements expands

3. At the bottom of the list, click on **New Flat File Element**.

A new pane opens to the right.

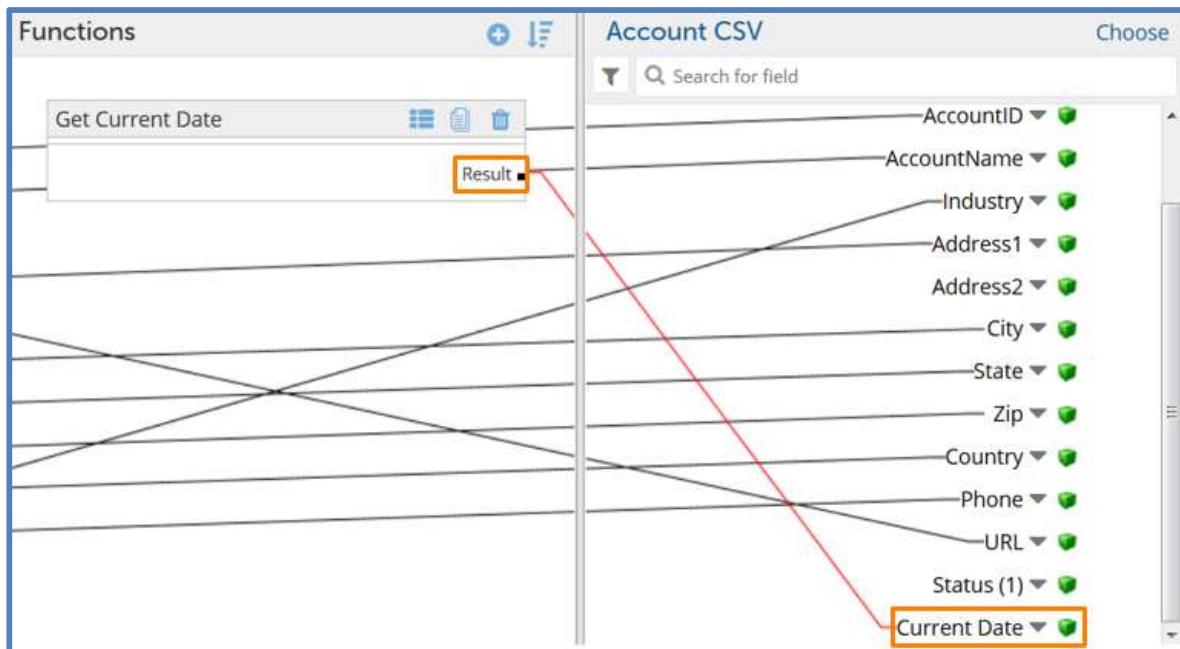
4. In the **Data Name** field, enter **Current Date**.

Notice when entering the Data Name, the corresponding element name changes.

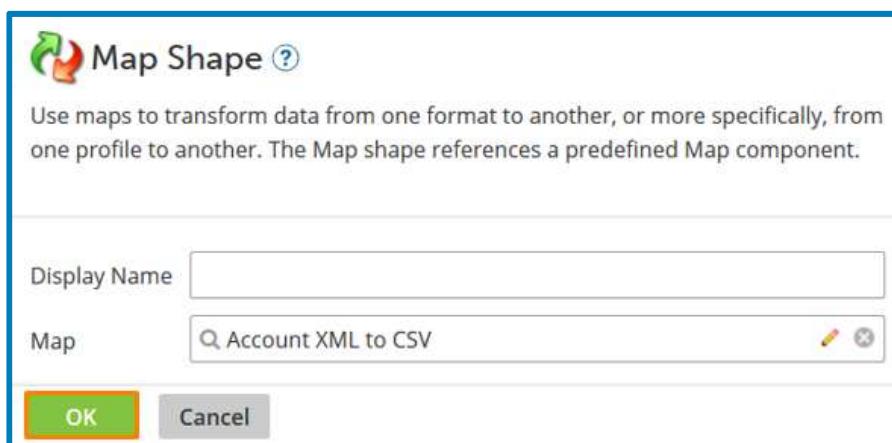


Exercise 14: Add Get Current Date Map Function

5. Click **Save and Close**.
6. Expand the **Elements** list and note the new **Current Date** field.
7. Map the **Get Current Date** result to the **Current Date** field.



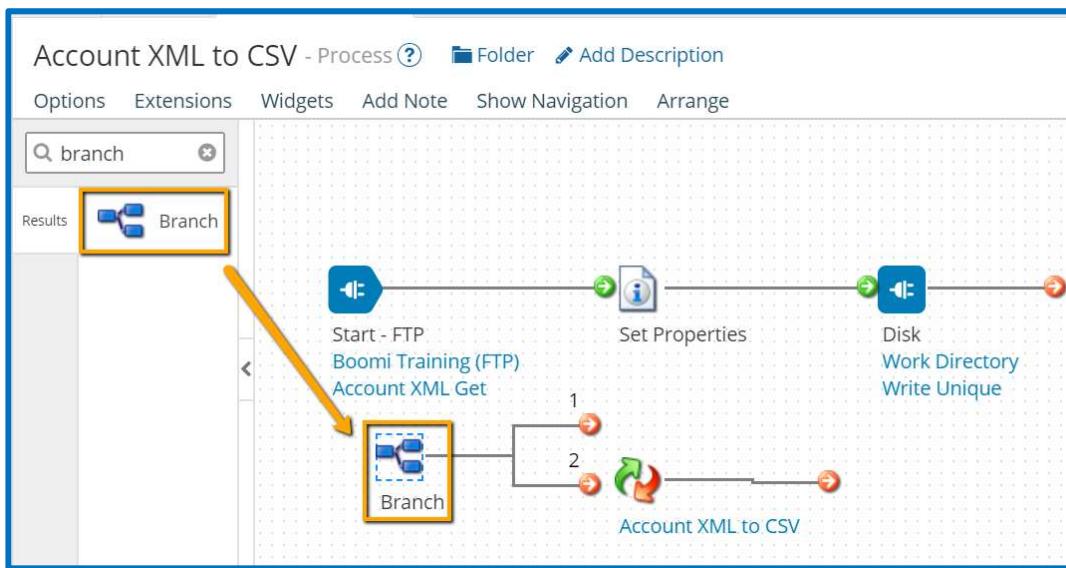
8. Click **Save and Close**.
9. Click **OK** to close the Map Properties pane.



Exercise 15: Add a Branch Shape to Manage the Process Flow

Although all main components are on the Process canvas, they are not organized to execute in the proper order. The goal of the integration is to archive the XML and translate it into a CSV type. To execute these actions sequentially, use the Branch shape to organize new paths so they process in incremental order.

1. Drag and drop a **Branch** shape from the shapes palette to the **Process** canvas.



The Branch Properties window opens.

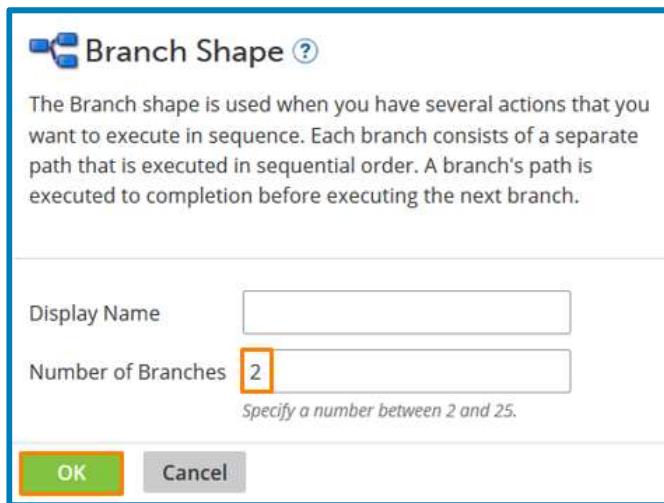
2. Set the **Number of Branches** to 2.



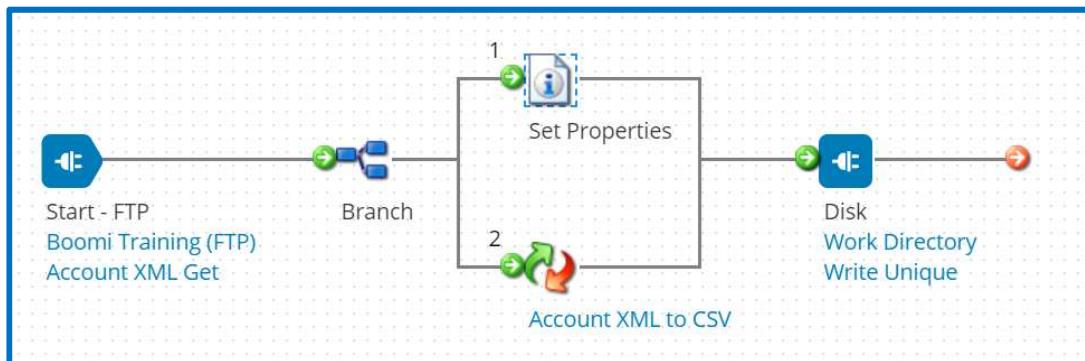
The greatest number of branches is 25, however, most are between 2 and 6.



Exercise 15: Add a Branch Shape to Manage the Process Flow

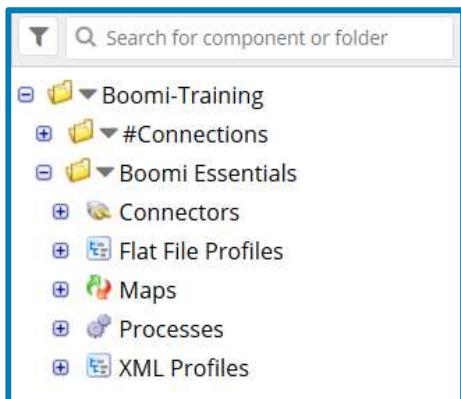


3. Click **OK**.
4. On the **Process** canvas, connect the **Start** shape to the **Branch** shape.
Connect **branch 1** to the **Set Properties** shape.
Connect **branch 2** to the **Map** shape.
Connect both the **Set Properties** shape and **Map** shape to the **disk connector**.



5. Click **Save**.
The component explorer now has more components:

Exercise 15: Add a Branch Shape to Manage the Process Flow



6. Test your Process

Documents		Test Results		
#		Logs	Shape Source Data	Connection Data
1	✓		View	Directory
2	✓		View	File Name /mnt/Test_Atom_Cloud_Store1/cloud/bocelcorp1.xml 1497645533762.dat

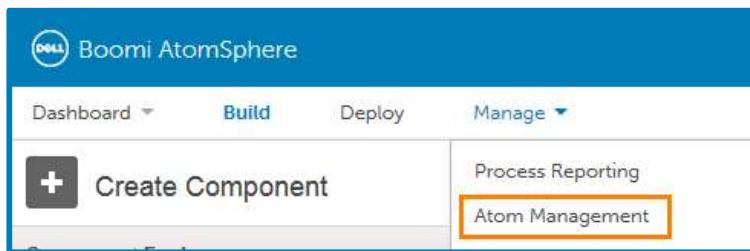
Notice each document now produces two file names. One set by the Set Properties Shape, and the other is the default .dat filename.



Exercise 16: Create an Environment and Attach an Atom

To deploy a process, you must first attach it to an existing environment which has an Atom attached. You will create a **Test** environment and attach it to the Test Atom Cloud.

1. Go to **Manage** and select **Atom Management**.



2. Click on **New** and then **environment** to create a new environment.



3. Name the environment **Test** with an Environment Classification of **Test**. Click **Save** to finish creating the environment.

A screenshot of the 'Add Environment' dialog box. It contains fields for 'Name*' (set to 'Test') and 'Environment Classification' (set to 'Test'). Both fields have an orange border. At the bottom, there are 'Save' and 'Cancel' buttons, with 'Save' being highlighted with an orange border.

You should see the test environment.



Exercise 16: Create an Environment and Attach an Atom

The screenshot shows the 'Manage' tab of the Boomi interface. At the top, there is a search bar labeled 'Search atoms and environments' and a green '+ New' button. Below the search bar, the word 'Test' is highlighted with an orange border. Under the 'Unattached Atoms' section, there is a cloud icon followed by the text 'Test Atom Cloud'.

Repeat these steps again to make a second environment: the Production Environment.

4. Click the +New button and select Environment from the drop-down list.

The screenshot shows the 'Manage' tab with the '+ New' button highlighted. A dropdown menu is open, showing three options: 'Atom' and 'Environment'. The 'Environment' option is highlighted with an orange border.

5. Name the environment **Production** with an Environment Classification of **Production**. Click **Save** to finish creating the environment.

The screenshot shows the 'Add Environment' dialog box. It has a header 'Add Environment ?' with a question mark icon. Below the header, there is a note 'Required fields.' with a red asterisk. There are two input fields: 'Name' with a red asterisk containing the value 'Production' and 'Environment Classification' with a red asterisk containing the value 'Production'. At the bottom of the dialog are two buttons: a green 'Save' button and a grey 'Cancel' button.

6. Once complete, your environments should appear in your Manage tab like the image below.

The screenshot shows the 'Manage' tab with the '+ New' button highlighted. Under the 'Unattached Atoms' section, there are two entries: 'Production' and 'Test'. Each entry has a cloud icon to its left.



Exercise 16: Create an Environment and Attach an Atom



There is no limit to the number of environments you can create. It is a best practice to create a development environment for development, and test and production environments for live executions. Usually, once a process is created and tested in development, it is promoted to production.

Attach the Test Atom Cloud

7. Click on the **Test environment**.

The screenshot shows the Boomi interface with the 'Production' environment selected. Under 'Unattached Atoms', there are two entries: 'Atom Cloud' and 'Test Atom Cloud', both represented by cloud icons.

8. Click in the **Attachments field** and select the **Test Atom Cloud** from the drop down.

The screenshot shows the configuration page for the 'Test' environment. In the 'Attachments' section, the dropdown menu is open, and 'Test Atom Cloud' is selected and highlighted with an orange border.

The **Test Atom Cloud** is now attached to the **Test** environment as shown in the image below.

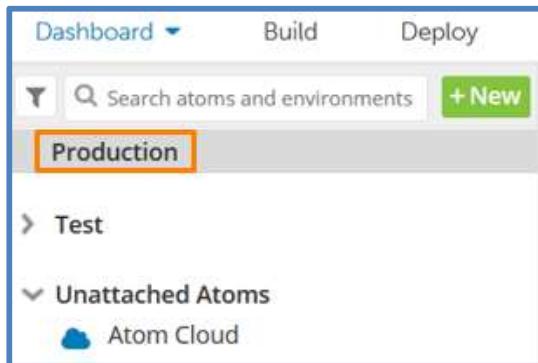
The screenshot shows the configuration page for the 'Test' environment. The 'Attachments' section now lists 'Test Atom Cloud' as an attached item.

Exercise 16: Create an Environment and Attach an Atom

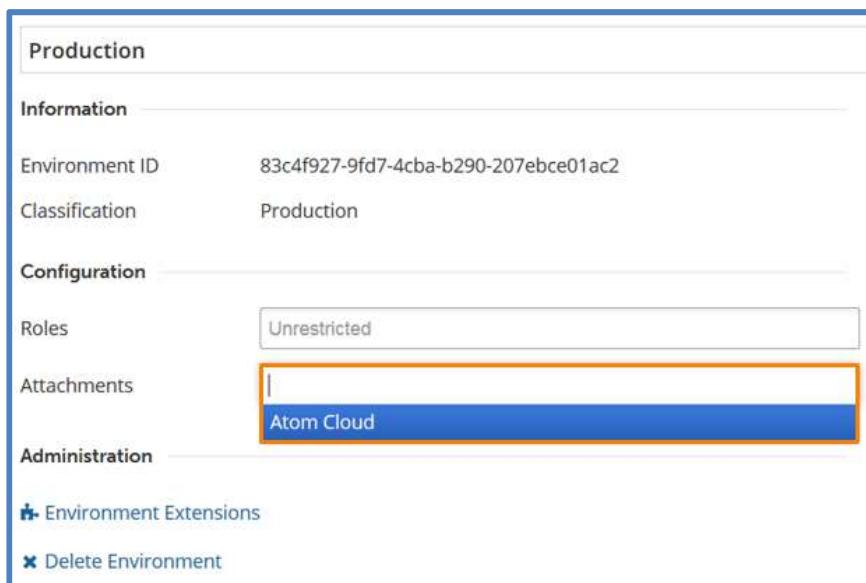
9. Next, attach the **Atom Cloud** to the **Production** environment.

Attach the Atom Cloud

10. Select the Production Environment from the Atom Management list.



11. Click in the **Attachments** field and select the **Atom Cloud** from the drop down.



The **Atom Cloud** is now attached to the **Production** environment as shown in the image below.



Exercise 16: Create an Environment and Attach an Atom

Production	
Information	
Environment ID	83c4f927-9fd7-4cba-b290-207ebce01ac2
Classification	Production
Configuration	
Roles	Unrestricted
Attachments	Atom Cloud

You should now see the **Atom Cloud** under the **Production Environment** and the **Test Atom Cloud** under the **Test Environment**.

The screenshot shows the Boomi interface with a navigation bar at the top featuring 'Dashboard', 'Build', and 'Deploy' buttons. Below the navigation is a search bar labeled 'Search atoms and environments' with a magnifying glass icon and a '+ New' button. The main content area displays two environment sections: 'Production' and 'Test'. Under 'Production', there is an entry for 'Atom Cloud' represented by a blue cloud icon. Under 'Test', there is an entry for 'Test Atom Cloud' also represented by a blue cloud icon.



Exercise 17: Deploy the Process

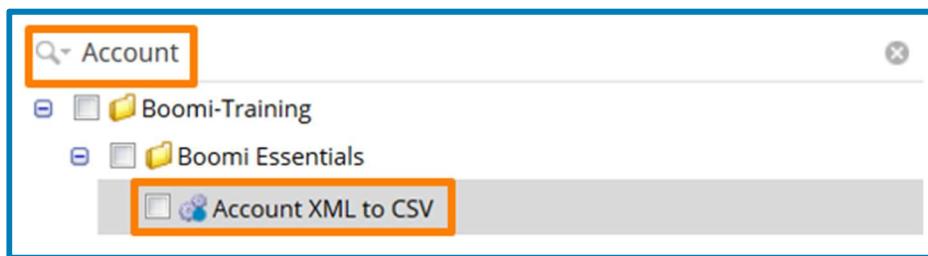
The Deploy tab is a process control panel that allows you to manage process versions and to officially embed a process version in an Atom(s) for automation. To execute or schedule a process to run at a particular interval, it must be deployed first. In this exercise you deploy your Account XML to CSV process to later track live activity on the Process Reporting tab.

1. Click the **Deploy** tab.



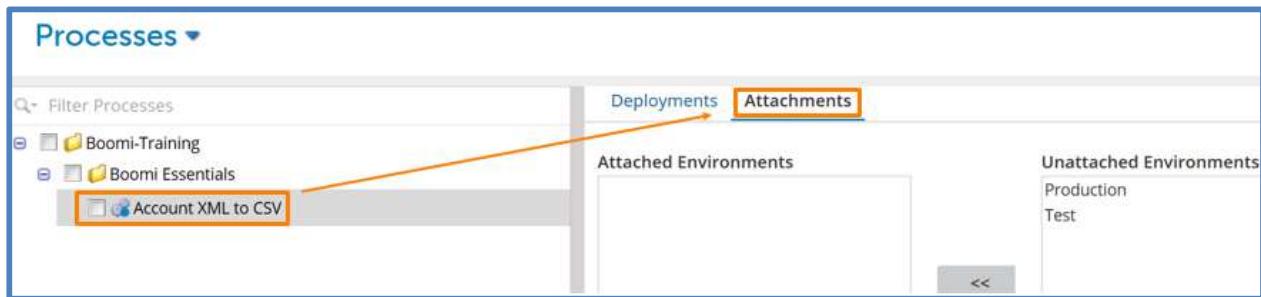
2. In the **Processes** window, highlight the **Account XML to CSV** process.

- ✓ *To quickly find your process, type Account in the search bar so only processes with the keywords appear. Do NOT check the box before the process, because you need to attach an Environment to this process first, ONLY highlight the process.*



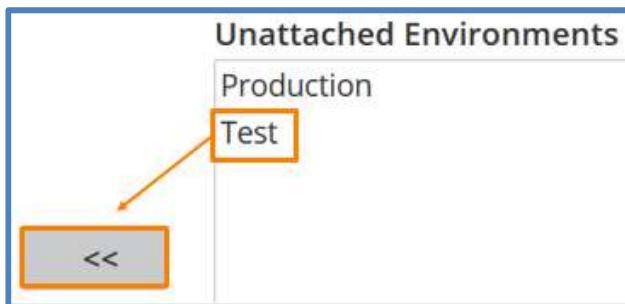
3. Click the **Attachments** tab.

The Attachments tab is where you attach an environment to a process.

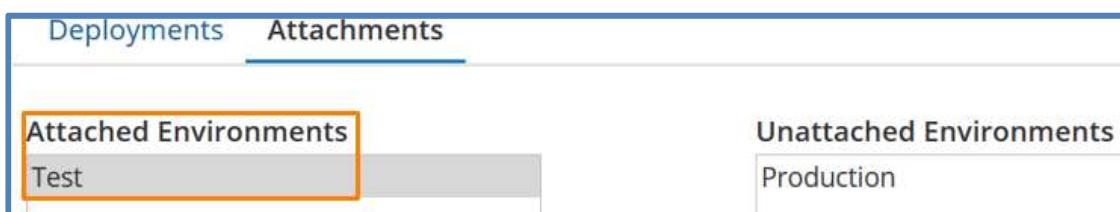


4. In the **Unattached Environments** window, highlight **Test**, then click << (Attach selected Environments).

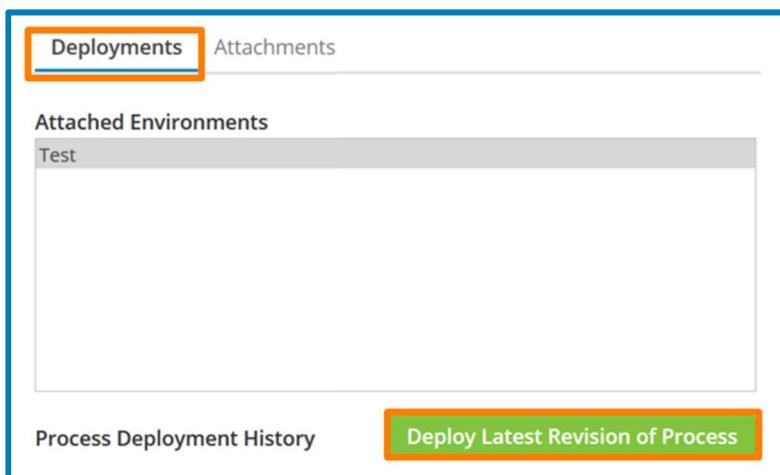
Exercise 17: Deploy the Process



This moves the Production environment from the Unattached pane to the Attached pane.



5. Click the **Deployments** tab and make sure the Production environment is highlighted.
6. In the bottom-right of the **Deployments** window, click **Deploy Latest Revision of Process**.

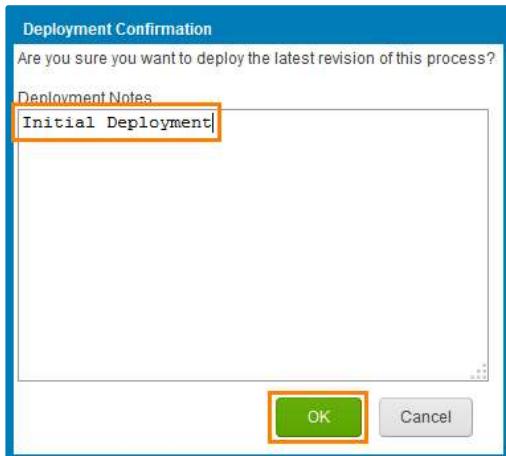


7. In the Deployment Confirmation pop-up, for the Deployment Notes enter **Initial Deployment**, then click **OK**.

The new Version 1 record appears in the Process Deployment History table. Your Deployment Note appears in the Notes column.



Exercise 17: Deploy the Process



-  *Deployment Notes makes tracking deployment changes easier as you release other versions. Deploying a process does NOT put the process into an active production state. After you deploy a process, you must execute it either manually (**Manage > Process Reporting**) or through a schedule (**Manage > Atom Management**).*
-  *Upon Deployment, AtomSphere audits your account to make sure you have enough connection licenses to deploy this process into production. If you do not have the enough available licenses you will receive an error message.*

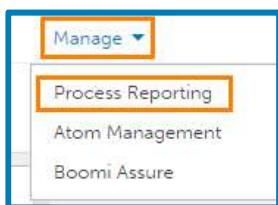
Process Deployment History					Deploy Latest Revision of Process
Version	Deployed By	Date Deployed	Deployment ID	Notes	
1	 tony_	@dell.com	2015-02-05 06:00:09 PM	96b2d160-b9f2-4842-ba	Initial Deployment



Exercise 18: Execute the Process

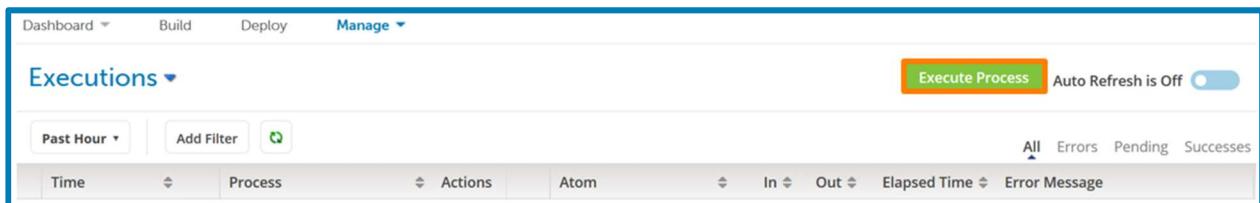
Now that the Initial Deployment of our process is complete, we need to execute the process manually. We will use the Process Reporting tab to start the Execution manually.

1. Navigate to the **Manage Tab**, and select **Process Reporting** from the drop-down menu



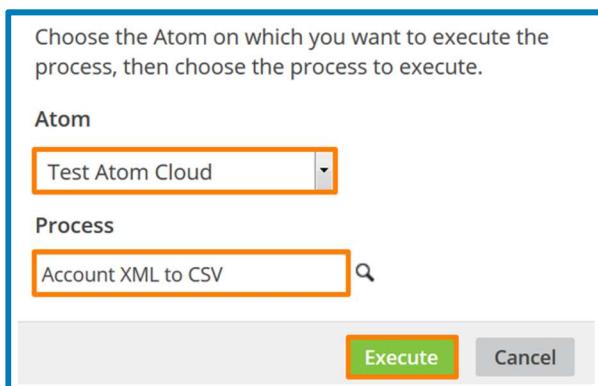
The **Process Reporting** page defaults to the **Executions** view. From here, you can see the recent executions of all deployed processes on your account. You also can manually execute your process.

2. To **Execute** your deployed process, simply click on the green **Execute Process** button in the upper right side of the **Process Reporting** window.



A drop-down menu will appear to allow you to select the Process you want to execute and the Atom to run it.

3. Select **Test Atom** for the Atom field, and **Account XML to CSV** for the process.



4. Click the green **Execute** button to run the process through an execution.

Exercise 18: Execute the Process

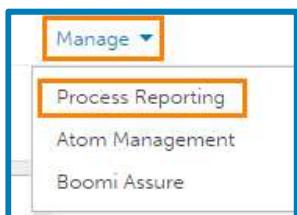
- ✓ Once you execute your process, you can refresh the table to see the status of your process. Once completed, it will give a final status of the process and tell you of any errors it came across along the way.



Exercise 19: Track Live Executions in Process Reporting

Process Reporting is a search console for accessing information about executed processes. You can view statistics about the execution to see how documents have succeeded, failed, and/or react against connectors and process shapes in an elapsed timeframe. In this exercise, review some key information about the latest executions for the **Account XML to CSV** process.

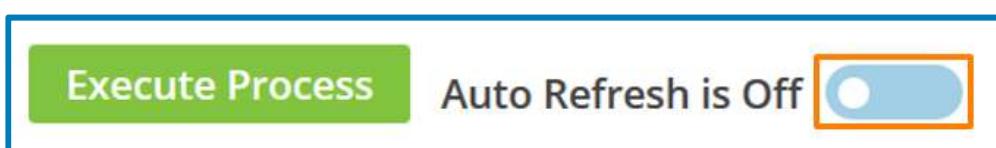
1. Click the **Manage → Process Reporting** tab.



2. In the Executions view, note the process execution instances and monitor the Process Reporting until the execution record with inbound and outbound data displays.
 - ✓ *You may need to click Refresh to see new process executions logged.*

A screenshot of the 'Executions' view. At the top, there are filters for 'Past Hour', 'Add Filter', and a search icon. On the right, there are buttons for 'Execute Process', 'Auto Refresh is Off' (with a toggle switch), and status indicators for 'All', 'Errors', 'Pending', and 'Successes'. Below the filters is a table header with columns: Time, Process, Actions, Atom, In, Out, Elapsed Time, and Error Message. A single execution row is shown: '2017-05-05 01:55:23 I Account XML to CSV Test Atom Cloud 2 4 0:12'. The 'In' and 'Out' columns show two document icons, and the 'Actions' column shows a gear icon.

3. Turn on **Auto Refresh** to automatically refresh the execution records every minute.



4. Click the **Actions** button and then select **View Deployment Components**.

Exercise 19: Track Live Executions in Process Reporting

Time	Process	Actions	Atom
2017-05-05 02:01:36	Account XML to CSV		Test Atom Cloud
2017-05-05 01:55:23	Account XML to CSV		View Process

5. Next to the **Account CSV** profile, click the **View/Edit** button.

A new browser tab or window will open displaying the direct component instance.

Name	Type	Revision	Modified By	Modified Date
Account XML to CSV	Map	2		2017-05-05 11:49:48 AM
Account XML	XML Profile	1		2017-05-05 11:07:50 AM
Write Unique	Operation	1		2017-05-05 09:34:11 AM
Boomi Training (FTP)	Connection	1		2017-05-05 09:00:14 AM
Account XML Get	Operation	1		2017-05-05 09:04:24 AM
Account CSV	Flat File Profile	2		2017-05-05 11:49:15 AM
Account XML to CSV	Process	10		2017-05-05 01:40:14 PM
BTC Directory	Connection	1		2017-05-05 11:56:18 AM

6. Once you viewed the component instance, close its tab or window to return to the **View Deployed Components** window.



Exercise 19: Track Live Executions in Process Reporting

The component revision number from the **Components in this Deployment Version** table corresponds to the component revision number in the Revision History. You can view the specific component configuration the Atom is executing and reporting on the Manage tab.

Components in this Deployment Version				
Name	Type	Revision	Modified By	Modified Date
Account XML to CSV	Map	2		2017-05-05 11:49:48 AM
Account XML	XML Profile	1		2017-05-05 11:07:50 AM
Write Unique	Operation	1		2017-05-05 09:34:11 AM
Boomi Training (FTP)	Connection	1		2017-05-05 09:00:14 AM
Account XML Get	Operation	1		2017-05-05 09:04:24 AM
Account CSV	Flat File Profile	2		2017-05-05 11:49:15 AM
Account XML to CSV	Process	10		2017-05-05 01:40:14 PM
BTC Directory	Connection	1		2017-05-05 11:56:18 AM

Cancel

7. Click **Cancel** to return to the Process Reporting window.
8. Highlight the first execution record and then click on the **View Process Logs** symbol.

Time	Process	Actions	Atom	In	Out	Elapsed Time
2017-05-05 02:01:36	Account XML to CSV		Test Atom Cloud	2	4	0:07
2017-05-05 01:55:23	Account XML to CSV		Test Atom Cloud	2	4	0:12

9. Note the details in the **Show Log** pane, then click **Cancel** to return to the Process Reporting window.



Exercise 19: Track Live Executions in Process Reporting

Show Log					
Minimum Status to Show		INFO	Save Logs		
Time	Level	Shape	Ext Info	Message	Details
2017-05-05 02:01:42 PM	INFO	initializing...		Executing Process Account XML to CSV	
2017-05-05 02:01:42 PM	INFO	Start	Boomi Training (FTP): ftp C	Executing Start Shape	
2017-05-05 02:01:43 PM	INFO	Start	Boomi Training (FTP): ftp C	2 document(s) found for processing.	
2017-05-05 02:01:43 PM	INFO	Start	Boomi Training (FTP): ftp C	Shape executed successfully in 886 ms.	
2017-05-05 02:01:43 PM	INFO	Branch		Executing Branch Shape with 2 document(s).	
2017-05-05 02:01:43 PM	INFO	Branch		Shape executed successfully in 0 ms.	
2017-05-05 02:01:43 PM	INFO	Document Properties		Executing Set Properties Shape with 2 docun	
2017-05-05 02:01:43 PM	INFO	Document Properties		Shape executed successfully in 62 ms.	
2017-05-05 02:01:43 PM	INFO	Connector	BTC Directory: disk Conne	Executing Connector Shape with 2 document	
2017-05-05 02:01:43 PM	INFO	Connector	BTC Directory: disk Conne	Shape executed successfully in 85 ms.	
2017-05-05 02:01:43 PM	INFO	Map	Account XML to CSV	Executing Map with 2 document(s).	
2017-05-05 02:01:43 PM	INFO	Map	Account XML to CSV	Shape executed successfully in 93 ms.	
2017-05-05 02:01:43 PM	INFO	Connector	BTC Directory: disk Conne	Executing Connector Shape with 2 document	
2017-05-05 02:01:43 PM	INFO	Connector	BTC Directory: disk Conne	Shape executed successfully in 79 ms.	
2017-05-05 02:01:44 PM	INFO	cleanup...		Process execution completed normally.	



Exercise 20: Detach Environment

A Boomi best practice is to detach the environment from the process when training is complete. This ensures the process is not running unnecessarily, and it frees up connection licenses no longer in use.

To detach an environment

1. Click on the **Deploy** tab, highlight the process then select the **Attachments** tab.

The screenshot shows the Boomi Deploy interface. At the top, there are tabs: Dashboard, Build, Deploy (which is highlighted in blue), and Manage. Below the tabs, the title 'Processes' is displayed with a dropdown arrow. On the left, there is a sidebar with a 'Filter Processes' search bar and a tree view showing two environments: 'Boomi-Training' and 'Boomi Essentials'. Under 'Boomi Essentials', a process named 'Account XML to CSV' is listed. An orange box highlights this process. To the right of the sidebar, there are two tabs: 'Deployments' and 'Attachments' (which is also highlighted in blue). Below these tabs, the heading 'Attached Environments' is shown, followed by a list containing 'Test'. A large orange arrow points from the highlighted 'Account XML to CSV' process in the sidebar towards the 'Attachments' tab.

2. Select the Attached environment, then click on the **Detach Selected Environment >>** button.

The screenshot shows the 'Attachments' tab of the Boomi Deploy interface. At the top, there are tabs: Deployments (which is highlighted in blue) and Attachments. Below the tabs, there are two sections: 'Attached Environments' on the left and 'Unattached Environments' on the right. In the 'Attached Environments' section, the environment 'Test' is listed and highlighted with an orange box. In the 'Unattached Environments' section, the environment 'Production' is listed. Between the two sections is a double-headed arrow labeled '<<' and '>>'. The '>>' button is highlighted with an orange box.

The environment appears in the Unattached Environments list.



Exercise 20: Detach Environment

Unattached Environments

Production

Test

Your Boomi process is now un-deployed from the Test Environment.

