

WORKFLOW Parent/Child Forms

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Winshuttle



WINSHUTTLE
USER
GROUP
SAN DIEGO | 2013

Introduction

Winshuttle Workflow

- Parent/Child forms

Uses:

- Instantiate another fully independent process from a repeating element
- Synchronize the progress of multiple processes
- Break apart a complex form into more manageable pieces



Target Audience

Business Process Developers

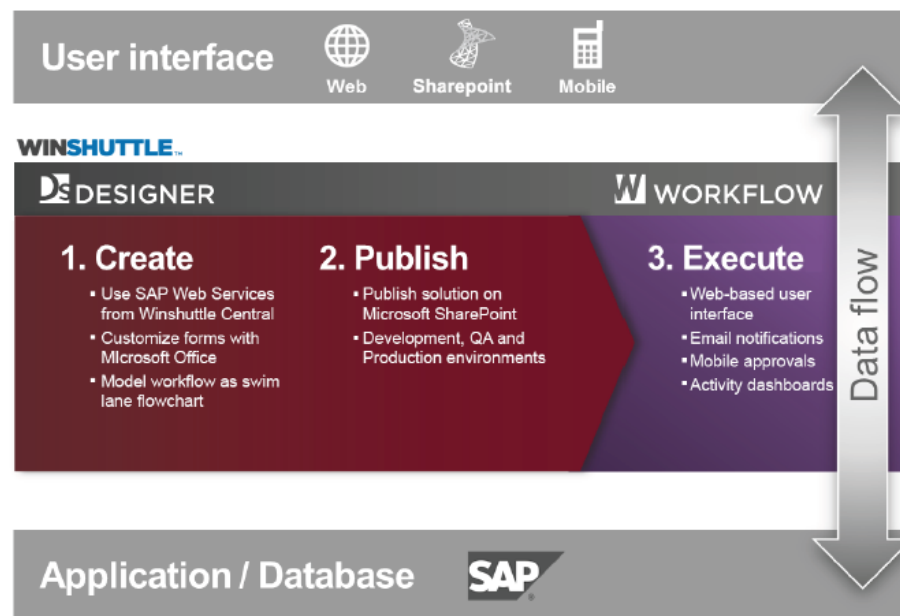
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Winshuttle Platform (cont.)

Workflow (approval process)

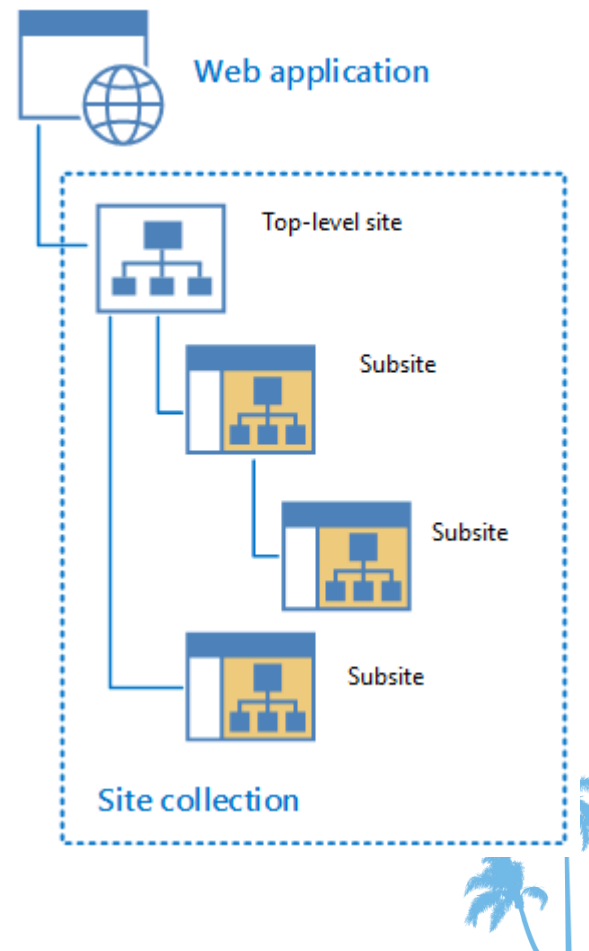
- Central
- Library
- Designer
- Form
 - List



Basic Concepts

Common (SharePoint/Winshuttle)

- Site
 - Group of pages, libraries, lists, etc.
- Library
 - Create and collect files
- List
 - Create and collect data
- Security
 - User permissions (site groups)



Basic Concepts (cont.)

Unique (Winshuttle)

- Workflow engine
- Designer
- Web parts

Winshuttle Form Library

Name
Child - 11/1/2013 5:32:20 PM
Child - 11/1/2013 5:32:20 PM
Child - 11/1/2013 5:32:20 PM
Parent 11/1/2013 5:28:56 PM
MasterDataManagementC - 11/1/2013 5:18:06 PM

(Items 1 to 5) Next

Winshuttle Task List

Item	Process Time	Due Date	Task Name
Child - 11/1/2013 5:32:20 PM	1 D 23:21:19	11/4/2013 5:37:25 PM	Plant Data
Child - 11/1/2013 5:32:20 PM	1 D 23:22:55	11/4/2013 5:35:50 PM	Plant Data
Parent 11/1/2013 5:28:56 PM	1 D 23:29:43	11/4/2013 5:32:26 PM	Activity 597

Logged in as: Adrian Jimenez (adrian.jimenez@winshuttle.com)

Winshuttle Process List

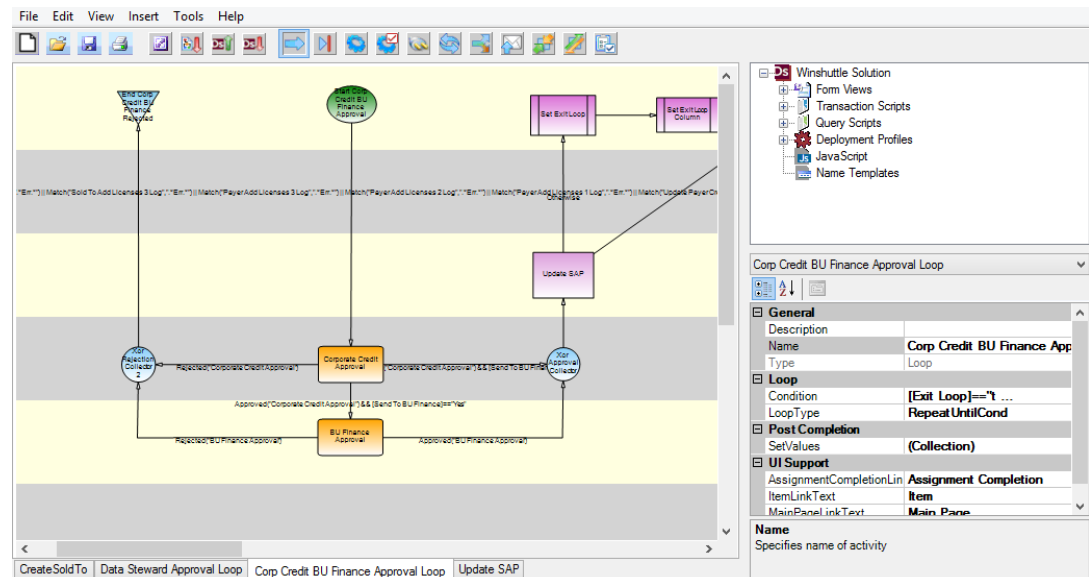
Item	Site	Process Time	Due Date
Child - 11/1/2013 5:32:20 PM	/sites/central/FormEx/afk	1 D 23:21:30	11/4/2013 5:37:25 PM
Child - 11/1/2013 5:32:20 PM	/sites/central/FormEx/afk	1 D 23:22:18	11/4/2013 5:36:38 PM



Winshuttle Components (cont.)

Designer

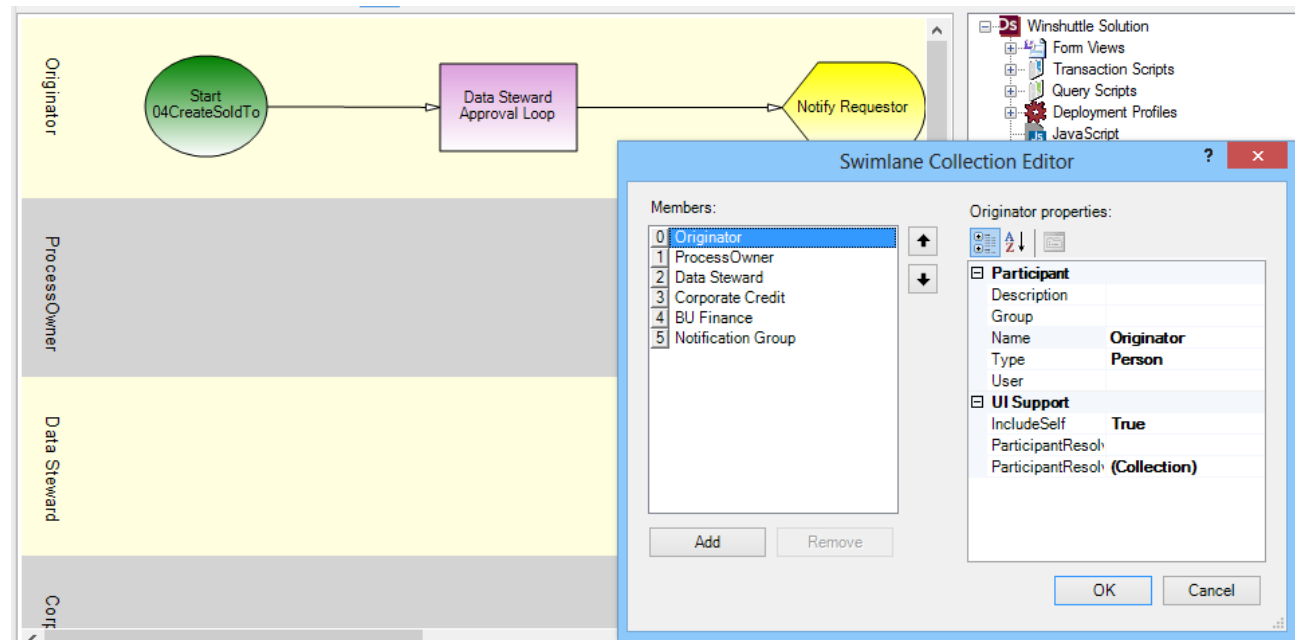
- Canvas
 - Workflow Properties
 - Process/form name
 - Duration (units)
 - Notifications



Winshuttle Components (cont.)

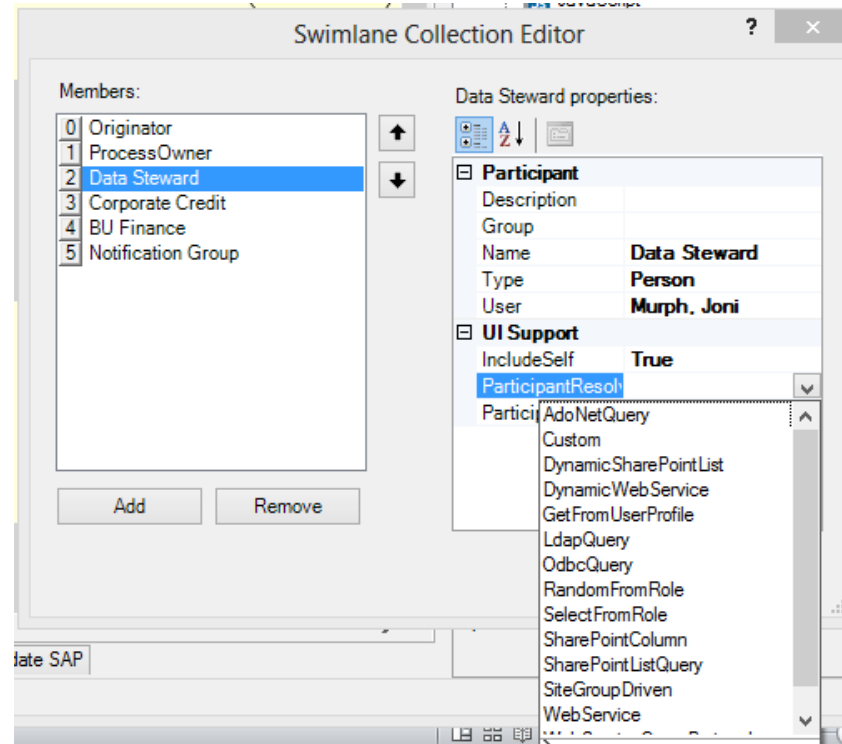
- Swimlanes (Roles)
 - SharePoint Site Groups*

* domain groups not supported



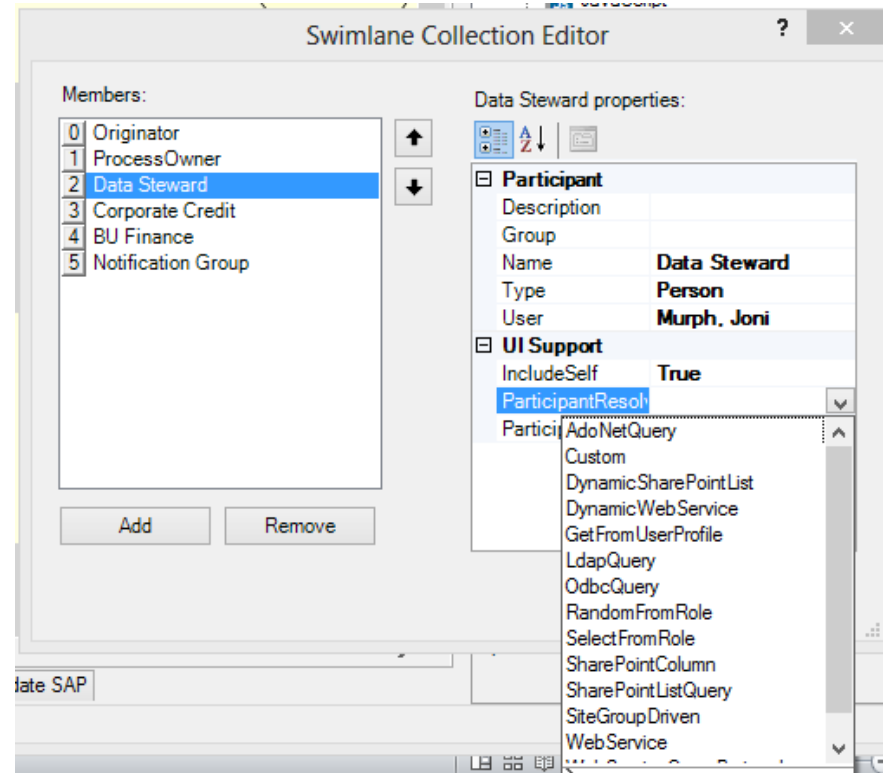
Winshuttle Components (cont.)

- Swimlanes (Roles)
 - Participant Resolver
 - Data Source
 - Form/list values



Winshuttle Components (cont.)

- Swimlanes (Roles)
 - Assignment style
 - Person
 - hardcoded
 - Person from role
 - Single assignee
 - Team from role
 - One or more assigned
 - Include self
 - To include/exclude
 - Optional assignments
 - Transition conditions

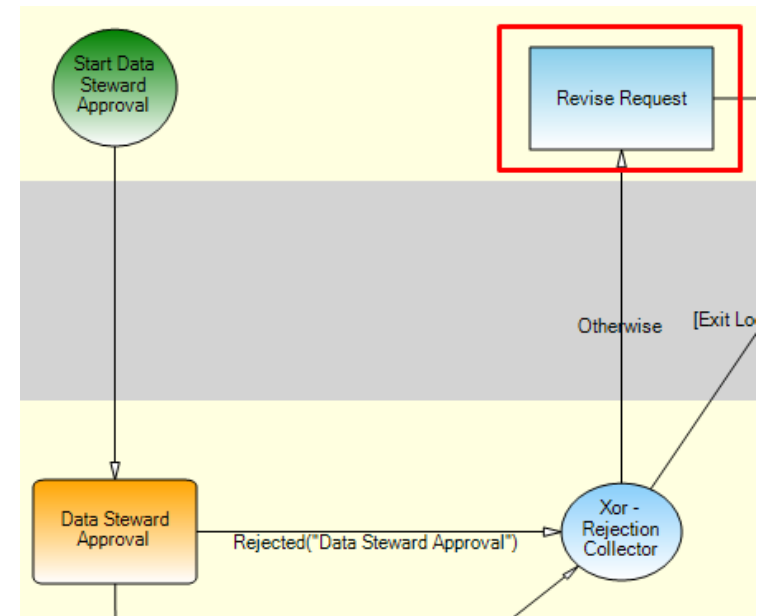


Winshuttle Components (cont.)

- Nodes
 - Activity
 - Assignment - completion
 - email

Uses:

- Task/assignment for participant
- Assignee “completes” task

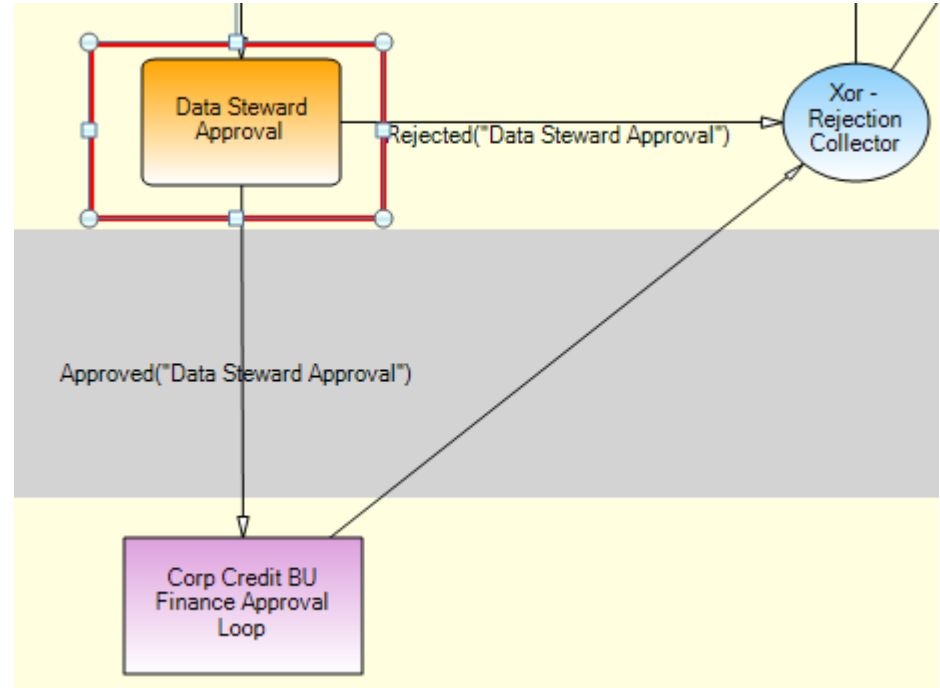


Winshuttle Components (cont.)

- Nodes
 - Approval
 - Assignment - decision
 - Email

Uses:

- Task/assignment for participant
- Assignee(s) “approve” or “reject”
- Team vote

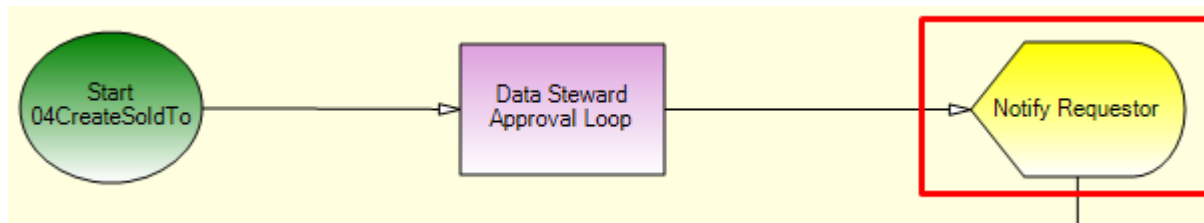


Winshuttle Components (cont.)

- Nodes
 - Notification
 - Email
 - Form/list/library information

Uses:

- Notify participants of workflow progress
- Forward form data without assigning a task

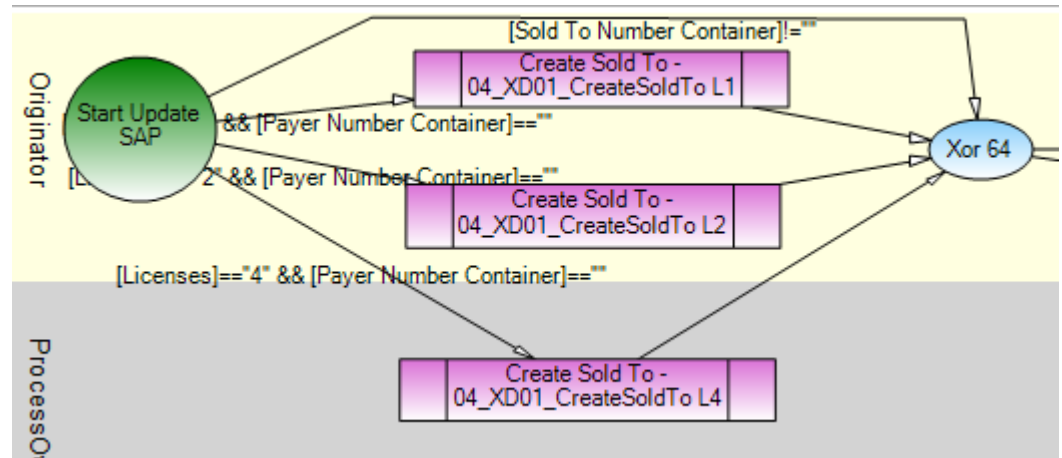


Winshuttle Components (cont.)

- Nodes
 - Plugins
 - Automated action
 - “Helper” functionality

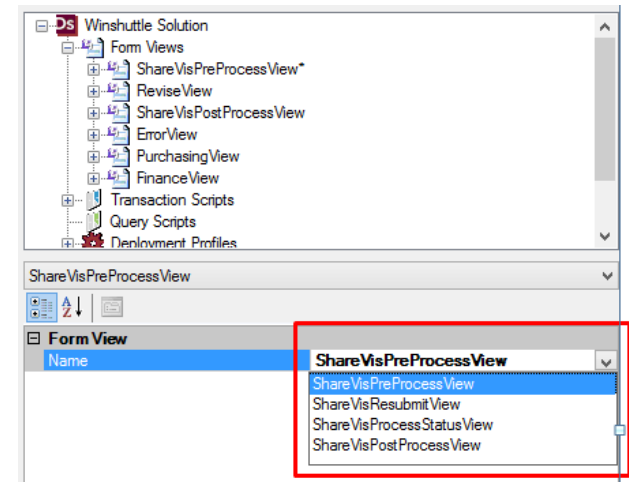
Uses:

- Execute web services to SAP
- Copy a form
- Send an email to outside
- Update SharePoint list/library
- Export form data to database
- Start a process



Winshuttle Components (cont.)

- Views
 - Winshuttle Workflow Views
 - ShareVisPreProcessView
 - Presented at form instantiation
 - ShareVisPostProcessView
 - Presented at process completion
 - ShareVisResubmitView
 - Presented when form instance is resubmitted
 - ShareVisProcessView
 - Presented when form instance is accessed outside of an assignment



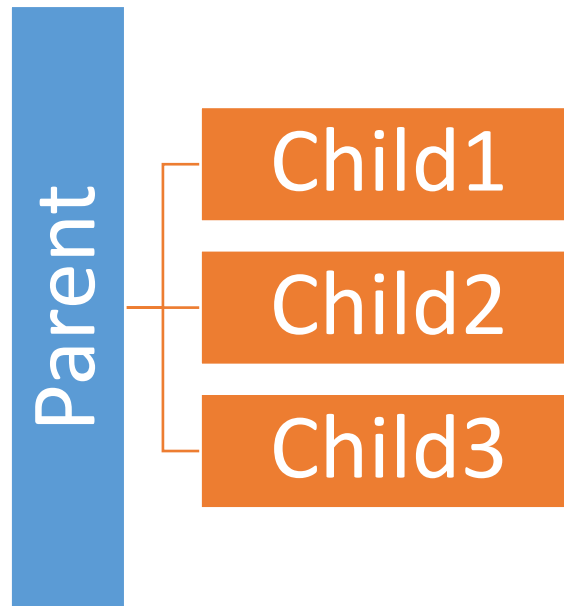
Winshuttle Components (cont.)

- Key Components
 - Parent
 - Form
 - Process
 - Form ID
 - FORM PROCESS LAUNCH Plugin
 - WAIT FORM CHILD PROCESSES plugin
 - LOOP node
 - WAIT plugin
 - UPDATE SHAREPOINT LIST plugin
 - UPDATE COLUMN plugin
 - EXPORT REPEATING GROUP plugin
 - Child
 - Form
 - Process
 - Participant Resolvers
 - Form ID
 - LOOP node
 - WAIT plugin
 - UPDATE SHAREPOINT LIST plugin
 - UPDATE COLUMN plugin
 - Helper List (optional)
 - SVSERVICE



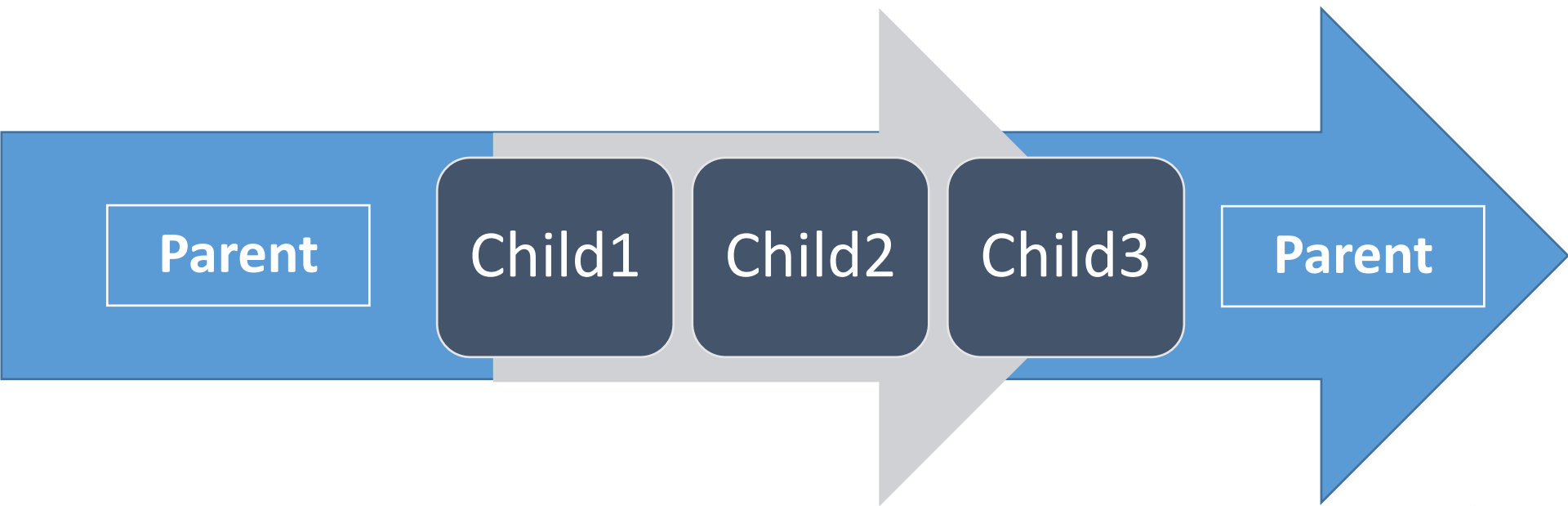
Winshuttle Components (cont.)

- Key Concepts
 - 1 Parent



Winshuttle Components (cont.)

- Key Concepts
 - Progress Synchronization
 - WAIT FOR CHILD plugin



Winshuttle Components (cont.)

- Key Concepts
 - Data Synch



Demo

Parent/Child Configuration

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Questions



Winshuttle 101

Thank you!!

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