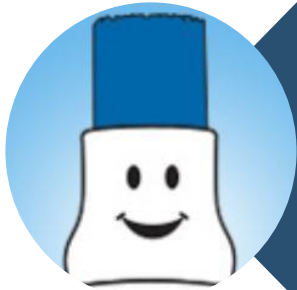


Advanced Workflow – Jumpstart Training

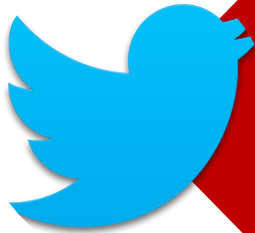
Jennifer Hwang | Winshuttle



Introduction



App – Winshuttle



#WUG2014 – Twitter



SSID – Omni Meetings
Password –omni14



Agenda

- Workflow Logic
- **Winshuttle Controls**
- Participant Resolvers
- Field Validation
- Exposed! Process Metadata
- Web Services
- Introduction to Composer



Winshuttle Controls (Form Elements)

- Web service
- SAP Field Lookup
- Button
- Current User
- Form Name
- Query
- Lookup
- Process
- Composer Helper Elements

* Green = Composer



Winshuttle Controls

Designer Actions Reference Guide

- “Ws.ControlName” naming convention

Composer Form Elements

- “Form Element” naming convention



Winshuttle Controls – Web Service

Web Service control

- Push/pull data from Winshuttle Web Service (SAP/Oracle EBS)
- Push/pull data from 3rd Party

Uses:

- Execute web service(s) for SAP transactions / BAPI / Queries / Oracle EBS / 3rd Party

Examples:

- Field Change: GL Accounts when Company Code Selected
- Button: Any!
- On Form Load: Queries

Properties:

Add/Remove: Adds or removes web service(s).

When button is pressed: renders a button and runs the web service(s) when pressed

When field changes: runs the web service(s) when a field changes

When form loads: runs the web service(s) when the form is opened

Ordinal: specify web service order of execution for multiples on form load / field change

The screenshot shows the 'SAP Web Service Info' dialog box. The 'Workflow' field is set to 'C:\Users\ajimenez\Dropbox\Winshuttle\Projects\WUG Training\Lessons\W'. The 'Web Service' list contains 'AS02'. The 'Input Values' table has the following data:

Web Service Field	Form Field
Main_Asset_Number	Main_Asset_Number
Company_Code	Company_Code
Asset_location	Asset_location
Room	Room
Validate	Validate

The 'Output Values' table has the following data:

Web Service Field	Form Field
LogField	LogField

The 'Run' section has the following options:

- ☒ When button is pressed: Run AS02
- ☐ When field changes:
- ☐ When form loads: Ordinal



Winshuttle Controls – SAP Field Lookup

SAP Field Lookup control / SAP F4 Lookup

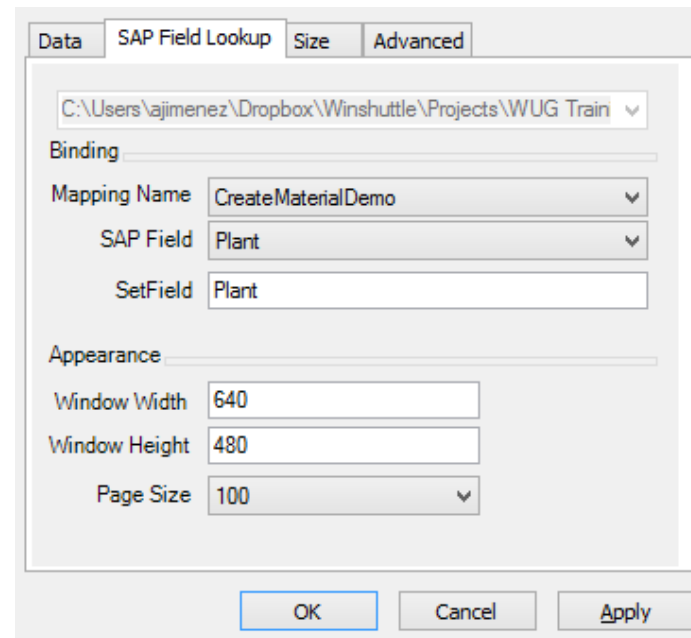
- Pulls live field value data from SAP in a window (F4 lookup)
- Only selection is added into the form field (if selected)

Uses:

- Live Search for valid values of an SAP field when:
 - Do not want to hard code values
 - Do not want to point to SharePoint list
 - Data is very dynamic

Examples:

- Material master – industry sector
- HR New Hire - currency



The screenshot shows the 'SAP Field Lookup' configuration dialog box. It has four tabs: 'Data', 'SAP Field Lookup' (selected), 'Size', and 'Advanced'. The 'Data' tab shows a file path: 'C:\Users\ajimenez\Dropbox\Winshuttle\Projects\WUG Train'. The 'Binding' section contains three fields: 'Mapping Name' (CreateMaterialDemo), 'SAP Field' (Plant), and 'SetField' (Plant). The 'Appearance' section contains three fields: 'Window Width' (640), 'Window Height' (480), and 'Page Size' (100). At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

Properties:

Mapping Name: web service to lookup

SAP Field: Web service field to pull data

Set Field: Form field to populate with selected data

Appearance properties: lookup window configuration



Winshuttle Controls - Button

Button

- Create custom buttons in Form

Uses:

- Integrate custom task completion controls into form
- Execute JavaScript
- Execute a plug-in
- Set a field value

Examples:

- From Documentation

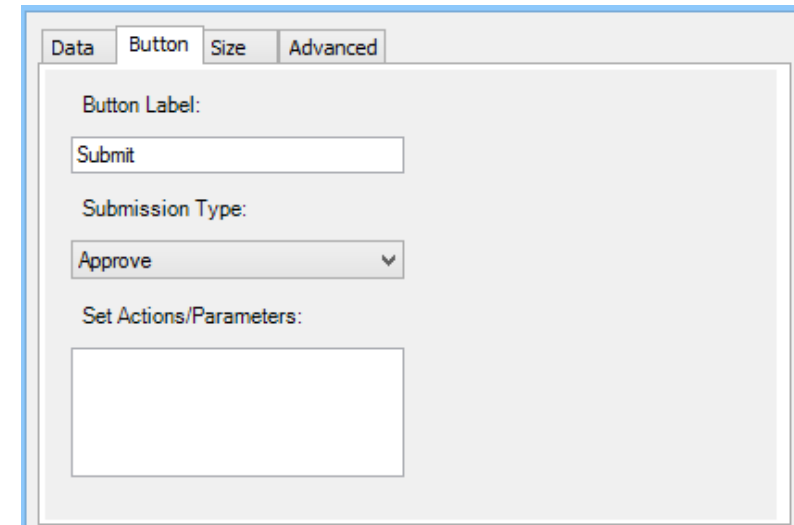
Properties:

Button Label: Name that will appear on the button.

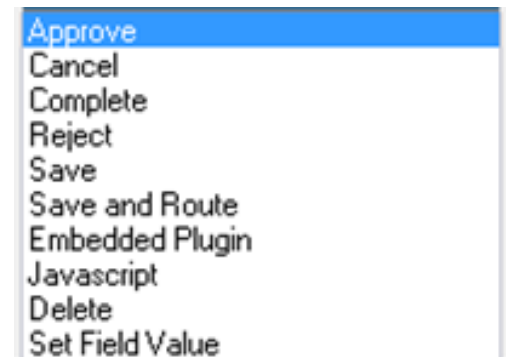
Set Actions/Parameters: Sets the value of a field in the form when the button is clicked

Submission Type: Submission action the button takes when clicked.

- Approve: approves the form and moves it to the next step in the workflow.
- Cancel: cancels action taken on the form and returns without submitting the form.
- Complete: completes the current assignment and moves the workflow to the next step.
- Reject: rejects the form and moves it to the next step in the workflow.
- Save: saves the work performed on the form.
- Save and Route: saves the work performed on the form and moves it to the next step in the workflow.
- Delete: deletes the form.
- Embedded Plugin: allows the Process Designer to specify a plug-in and its arguments to invoke on the server when the button is clicked.
- JavaScript: Allows the Process Designer to specify a JavaScript function to invoke when the button is clicked
- Set Field Value: sets the field to the value specified when the specified action is executed.



The screenshot shows the 'Button' tab of a configuration dialog. It has four tabs: 'Data', 'Button', 'Size', and 'Advanced'. The 'Button' tab is active. It contains three fields: 'Button Label' with the text 'Submit', 'Submission Type' with a dropdown menu showing 'Approve', and 'Set Actions/Parameters' with an empty text area.



* **Note:** If creating buttons to replace default form buttons, default WS form buttons must be disabled using the SVConfigurator

Winshuttle Controls – Current User

Current User control

- Pulls current SharePoint user's data

Uses:

- Capture current user data in form fields
- Submit workflow audit trail to SAP (via form fields and web service)

Examples:

- Journal Entry Composer
- Expense Report
- Finance MDG Request Form

Properties:

Auto Refresh: Forces an update of the specified field(s) regardless of the field contents.

Current Date XPath: The form field that will receive the current date.

Email XPath: The form field that will receive the email of the current user.

Full Name XPath: The form field that will receive the full name of the current user.

Login Name XPath: The form field that will receive the login name of the current user.

Task Description XPath: The form field that will receive the current task's description.

Task Name XPath: The form field that will receive the name of the current task.

User ID XPath: The form field that will receive the internal SharePoint ID of the current user.

User Name XPath: The form field that will receive the user name (the login name without the domain qualifier) of the current user.

The screenshot shows a software interface with four tabs: 'Data', 'Current User Info', 'Size', and 'Advanced'. The 'Current User Info' tab is selected. It contains two columns of text input fields. The left column has labels and fields for: 'Full Name XPath:' (with 'field3' entered), 'Email XPath:', 'Login Name XPath:', 'Current Date XPath:', and an 'Auto Refresh' checkbox. The right column has labels and fields for: 'User Name XPath:', 'Task Name XPath:', 'Task Description XPath:', and 'User ID XPath:'.



Winshuttle Controls – Form Name

Form Name control

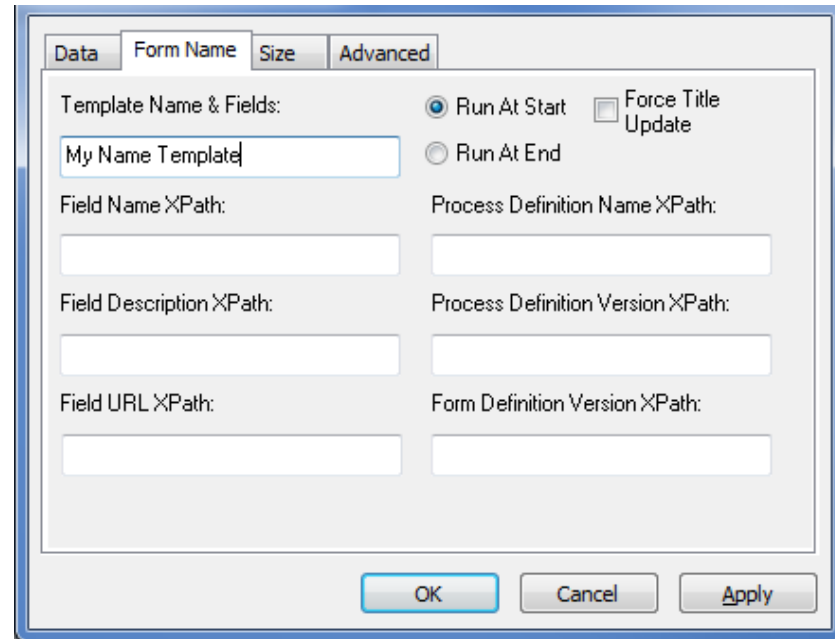
- Generates unique ID
- Pulls workflow data

Uses:

- Generate unique ID for a form instance
 - “Form Name – Today’s Date/Time” = Default
- Display workflow file details

Examples:

- From Documentation
- **Composer** Vendor Demo

The screenshot shows the 'Form Name' tab of a Winshuttle control configuration window. The 'Template Name & Fields' section contains a text box with 'My Name Template'. The 'Run At Start' radio button is selected, and the 'Force Title Update' checkbox is unchecked. There are six empty text boxes for XPath configurations: 'Field Name XPath', 'Field Description XPath', 'Field URL XPath', 'Process Definition Name XPath', 'Process Definition Version XPath', and 'Form Definition Version XPath'. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

Properties:

Field Description XPath: The field name that should receive the description of the form.

Field Name XPath: The field name that should receive the generated name.

Field URL XPath: The field name that should receive the URL to the form.

Force Title Update: If selected, executes the control to assign a form name even if a name already exists.

Form Definition Version XPath: The field name that should receive the form version that is running.

Process Definition Name XPath: The field name that should receive the process definition name that is running.

Process Definition Version XPath: The field name that should receive the process definition version that is running.

Run at End: Assigns the form name after the form is submitted.

Run at Start: Assigns the form name when the form is started.

Template Name & Fields: Comma-separated list of name template names and field names to combine into the name for the form.

Note: Auto-generated Form Name requires Form Name Template



Winshuttle Controls – Query Control

Query control

- Pull data from data source into the Form

Uses:

- Query a data source on form load or field change
 - For Participant Resolver

Examples:

- From Documentation

Properties:

Data Source

- InfoPath Data Source: specifies an InfoPath data source to query.
- Portal Root: URL to the root of the SPS or MOSS.
- Query: SQL query to execute on the data source
- User Profile Name Field (Portal Only): the name of the field that contains the current user's name. This functionality works in conjunction with the Ws.CurrentUser control, where the control populates a given field with the current user's login name.

Invocation Settings

- Run at Start: runs the query when the form is started.
- Run at End: runs the query when the form is submitted.
- Run When Field Changes: runs the query when the specified field is changed.
- Ordinal: order that the query should be performed (if multiple Ws.Query controls are used).
- Set Fields: Sets values in the XML to query return values. The format is <field name>=<query field name>,<field name>=<query field name>,...
- Append To Repeating Group: appends results to an existing repeating group.
- Clear Fields When Empty Return: if the query returns no rows, selecting this option will cause the form fields to be cleared.
- Empty Message: the message to display to the End User if the query returns no rows. If this field is left empty, no message will be displayed.

The screenshot shows the 'Query' tab of a Winshuttle configuration window. The 'Data Source' section has three radio buttons: 'InfoPath Data Source', 'Connection String' (which is selected and highlighted with a red rectangle), and 'User Profile Name Field (Portal Only)'. The 'Connection String' text box contains 's/marcwcentral/SVE\Lib/myexlib'. The 'Query' text box contains the SQL query: 'list=ShareVisQueryList; filter=[Employee]==@(/my:field2); select=[Manager]'. The 'Portal Root' text box is empty. The 'Invocation Settings' section has three radio buttons: 'Run At Start', 'Run At End', and 'Run When Field Changes' (which is selected). The 'Ordinal' text box is empty. The 'Set Fields' text box contains 'field3=Manager'. The 'Append To Repeating Group (if applicable)' checkbox is unchecked. The 'Clear Fields When Empty Return' checkbox is unchecked. The 'Empty Message' text box contains 'No Items Returned'.

Winshuttle Controls – Lookup Control

Lookup control > Query Control

- Query against a data source and return value(s)
- Interactive selection
- Place data set into a menu, then select

Uses:

- Narrow a dropdown list

Examples:

- From documentation

Properties:

Append To Repeating Group: Appends results to an existing repeating group.

Auto Run At End: Query runs when the form is submitted.

Auto Run At Start: Query runs when the form starts.

Data Source: Name of the InfoPath data source or ODBC connection string.

Auto Wildcard End: Automatically appends a SQL wildcard character to the end of the where clause.

Auto Wildcard Start: Automatically appends a SQL wildcard character to the beginning of the where clause.

Autorun Lockouts: When using multiple Ws.Lookup controls that run when field values change, circular references can occur if one Ws.Lookup control is attempting to update a field that is being used by another Ws.Lookup control, which can cause infinite loops. This property can be set to a comma-separated list of field names that are referenced by other Ws.Lookup controls, and when this Ws.Lookup control runs, it will not update the fields specified, which would cause other Ws.Lookup controls to run.

Display Columns: Comma-separated list of columns to display in the pop-up selection window. If a Web Service data source is configured, this value also serves to name the columns of data returned from the Web Service.

Allow Multiple Selections: Allows you to select multiple listings from the returned query results when the pop-up option is selected.

ShareVis.Lookup Properties

Data LookupProp Size Advanced

Data Source: ShareVisLookupList

Set Fields: field2=Zip Code,field3=City

Table:

Display Columns: Zip Code,City

Search Column: Zip Code

Search Operator: like

Search Key Field XPath: field2

☒ Auto Wildcard End

☒ Auto Wildcard Start

Raw "Where" Clause:

☐ Auto Run At Start

☐ Auto Run At End

☐ Run When Field Changes

☐ Run Query Only

☒ Interactive

☒ Popup

☐ Drop Down List

Minimum Search Key Size: 0

☐ Allow Multiple Selections

☐ Append To Repeating Group

Autorun Lockouts:

Window Title: ShareVisLookup

Table Title:

Width: 250

Height: 200

Ordinal:

☐ Clear Fields When Empty Return

Image URL:

Winshuttle Controls – Process Control

Process control

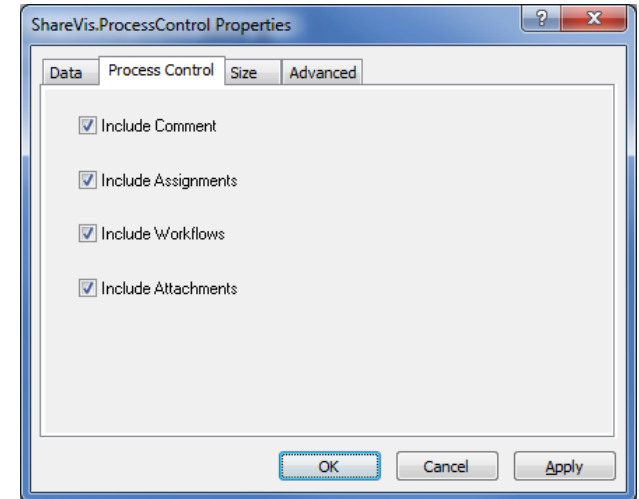
- Workflow process attributes

Uses:

- Audit Trail / History
- Default Assignment Method

Examples:

- Any!



Properties:

Include Assignments: Toggles the display of the Workflow Participant Assignment area.

Include Attachments: Allows the attachments in the comment section to be controlled independently.

Include Comment: Toggles the display of the Comments area when a workflow assignment is being completed.

Include Workflows: Toggles the display of the Process Control area that shows all available workflows



Winshuttle Form Elements

Composer Only Elements

- Helper
 - Signature
 - Address
 - Map

Examples:

- Customer Create



Questions

