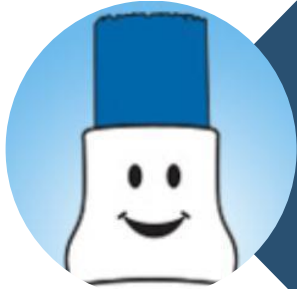


# Advanced Workflow Resolving Participants

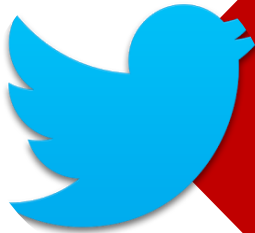
Sigrid Kok | Winshuttle



# Introduction



App – Winshuttle



#WUG2014 – Twitter



SSID – Winshuttle  
Password – wug2014



# Agenda

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



# Resolving WF Participants



## Topics

- What is it?
- Participant Resolution in the Workflow
- Participant Resolution in the Form
- Examples
  - “Mine” Group scenario
  - Other Examples

# Resolving WF Participants



## Topics

- What is it?
- Participant Resolution in the Workflow
- Participant Resolution in the Form
- Examples
  - “Mine” Group scenario
  - Other Examples

# What is it?

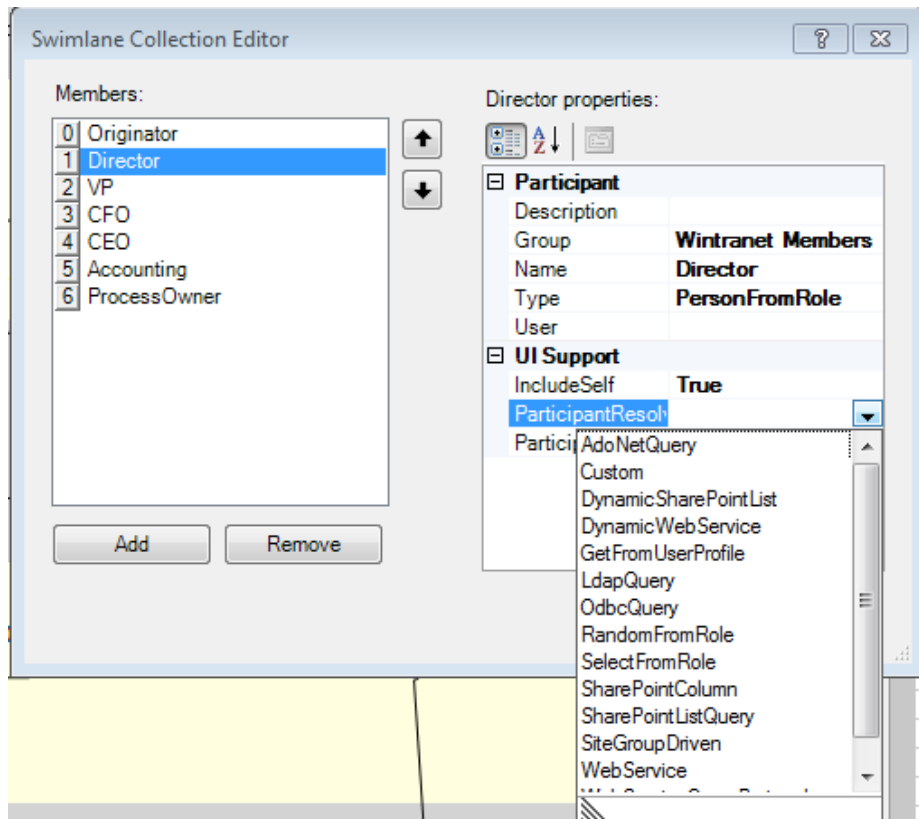


Who should participate, i.e. be assigned to swimlane, to play a role in a business process?

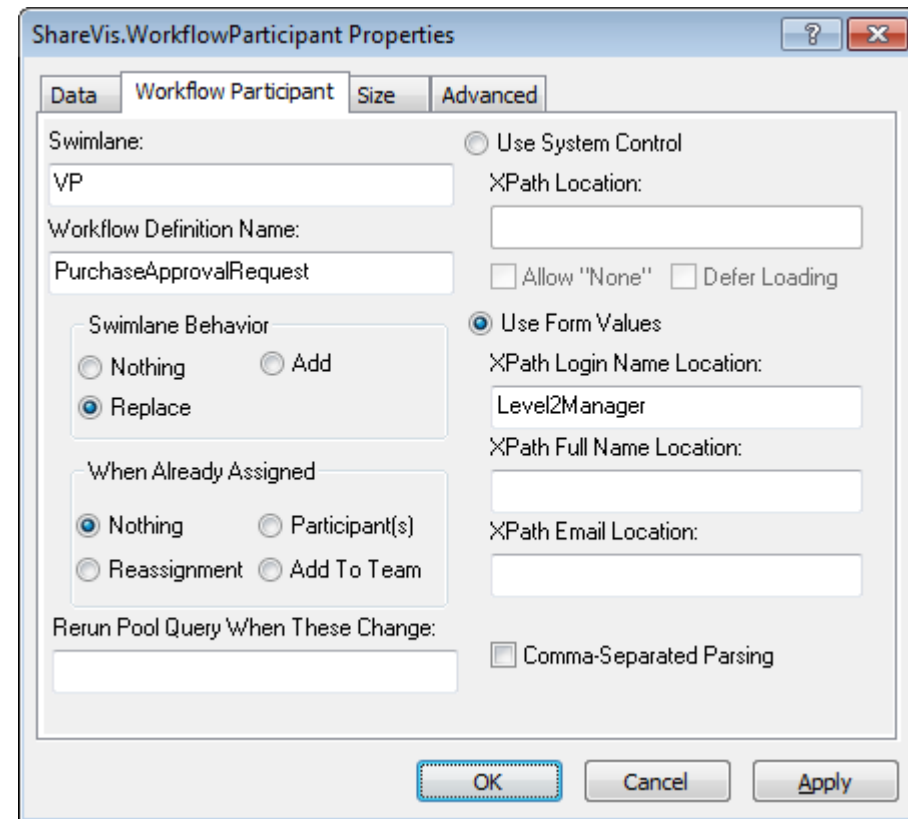
- Manual assignment of People or SharePoint Groups
- Interactive selection from People or SharePoint groups
- Automatic participant resolution



# Participants can be resolved in WF or Form



Participant Resolver in Designer



Workflow Participant Control in Form



# Resolving WF Participants



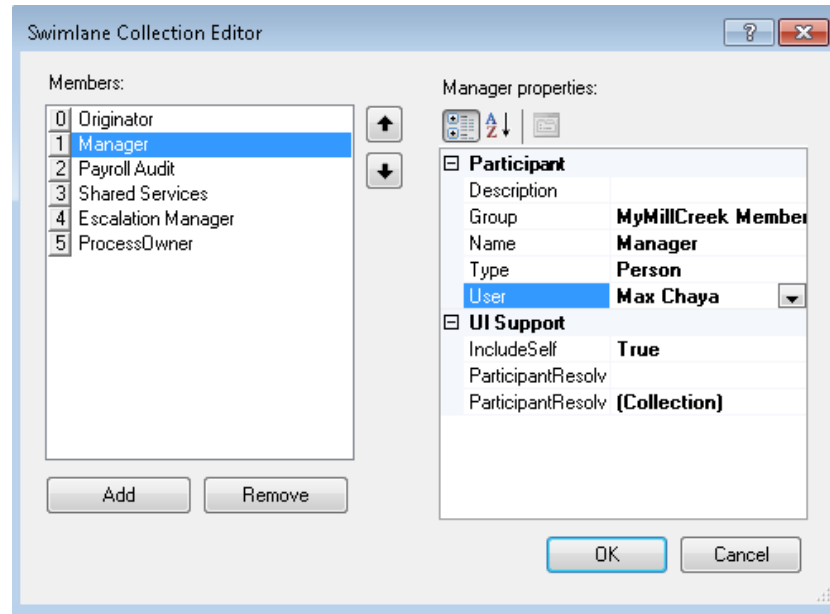
## Topics

- What is it?
- **Participant Resolution in the Workflow**
- Participant Resolution in the Form
- Examples
  - “Mine” Group scenario
  - Other Examples

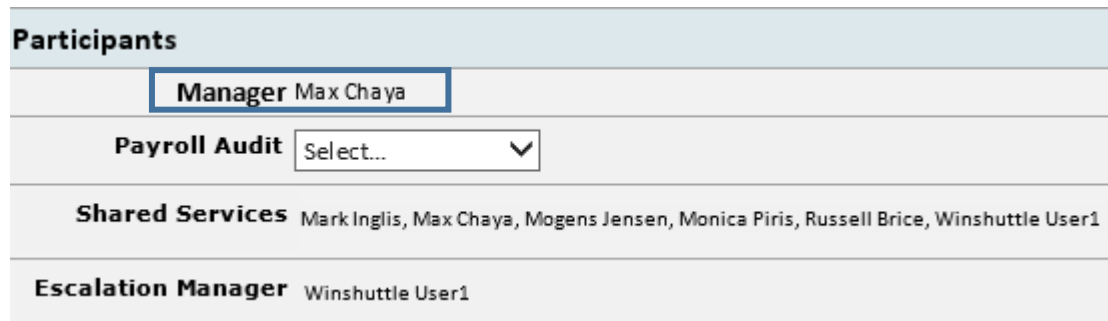


# Resolving WF Participants - Workflow

## Person



The 'Swimlane Collection Editor' dialog box is shown. It has a 'Members' list on the left and 'Manager properties' on the right. The 'Members' list contains: 0 Originator, 1 Manager (selected), 2 Payroll Audit, 3 Shared Services, 4 Escalation Manager, and 5 ProcessOwner. The 'Manager properties' section has a 'Participant' tab selected, showing: Description (empty), Group (MyMillCreek Member), Name (Manager), Type (Person), and User (Max Chaya). Below this is a 'UI Support' section with: IncludeSelf (True), ParticipantResolve (empty), and ParticipantResolve (Collection). There are 'Add' and 'Remove' buttons at the bottom left, and 'OK' and 'Cancel' buttons at the bottom right.



The 'Participants' form is shown. It has a 'Manager' field with the value 'Max Chaya'. Below this is a 'Payroll Audit' field with a dropdown menu showing 'Select...'. Below that is a 'Shared Services' field with the value 'Mark Inglis, Max Chaya, Mogens Jensen, Monica Piris, Russell Brice, Winshuttle User1'. At the bottom is an 'Escalation Manager' field with the value 'Winshuttle User1'.

**WINSHUTTLE**™



# Resolving WF Participants - Workflow

## Person from Role



Swimlane Collection Editor

Members:

0	Originator
1	Manager
2	Payroll Audit
3	Shared Services
4	Escalation Manager
5	ProcessOwner

Payroll Audit properties:

☒ **Participant**

Description	
Group	MyMillCreek Member
Name	Payroll Audit
Type	PersonFromRole
User	

☒ **UI Support**

IncludeSelf	True
ParticipantResolve	
ParticipantResolve (Collection)	

OK Cancel

**Participants**

<b>Manager</b>	Max Chaya
<b>Payroll Audit</b>	Select...
<b>Shared Services</b>	Mark Inglis, Max Chaya, Mogens Jensen, Monica Piris, Russell Brice, Winshuttle User1
<b>Escalation Manager</b>	Winshuttle User1

**WINSHUTTLE**™



# Resolving WF Participants - Workflow

## Team from Role



Swimlane Collection Editor

Members:

- 0 Originator
- 1 Manager
- 2 Payroll Audit
- 3 **Shared Services**
- 4 Escalation Manager
- 5 ProcessOwner

Shared Services properties:

**Participant**

Description

Group **MyMillCreek Member**

Name **Shared Services**

Type **TeamFromRole**

User

**UI Support**

IncludeSelf **True**

ParticipantResolve

ParticipantResolve **(Collection)**

Add Remove

OK Cancel

**Participants**

**Manager** Max Chaya

**Payroll Audit** Select... ▼

**Shared Services**

NOT on team

- Mark Inglis
- Max Chaya
- Mogens Jensen
- Monica Piris
- Russell Brice

ON team

**Escalation Manager** Winshuttle User1

# Resolving WF Participants - Workflow



## Team from Role with SiteGroupDriven

Swimlane Collection Editor

Members:

0	Originator
1	Manager
2	Payroll Audit
3	Shared Services
4	Escalation Manager
5	ProcessOwner

Add Remove

Shared Services properties:

Participant

Description	
Group	MyMillCreek Member
Name	Shared Services
Type	TeamFromRole
User	

UI Support

IncludeSelf	True
ParticipantResolv	SiteGroupDriven
ParticipantResolv	(Collection)

OK Cancel

Participants

Manager Max Chaya

Payroll Audit Select...

Shared Services Mark Inglis, Max Chaya, Mogens Jensen, Monica Piris, Russell Brice, Winshuttle User1

Escalation Manager Winshuttle User1

# Resolving WF Participants - Workflow



## Assign from SharePoint List – in WF and SP List

### Workflow Swimlane

### SharePoint List

Swimlane Collection Editor

Members:

0	Originator
1	Manager
2	PlantApprover
3	ProcessOwner

PlantApprover properties:

Participant

Description	
Group	MyMillCreek Member
Name	PlantApprover
Type	PersonFromRole
User	

UI Support

IncludeSelf	True
ParticipantResolve	SharePointListQu
ParticipantResolve	(Collection)

OK Cancel

Plant	PlantApprover
1000	Winshuttle User1
2000	Max Chaya
3000	Monica Piris

# Resolving WF Participants – Workflow



## Assign from User AD/SP Profile Lookup

- In Active Directory/SharePoint

### Active Directory

**Winshuttle User 1 Properties**

Published Certificates | Member Of | Password Replication | Dial-in | Object

Security | Environment | Sessions

Remote control | Remote Desktop Services Profile

Personal Virtual Desktop | COM+ | Attribute Editor

General | Address | Account | Profile | Telephones | Organization

Job Title:

Department:

Company:

Manager:

### SharePoint Profile

Account	AD2008R2\wsuser1
Name	Winshuttle User1
Work e-mail	wsuser1@winshuttledemo.com
Mobile phone	
About me	Standard Demo User Account
Picture	
Department	
Title	
SIP Address	wsuser1@winshuttledemo.com
First name	Winshuttle
Last name	User1
Work phone	
Manager	AD2008R2\maxc
User name	wsuser1
Web site	
Ask Me About	
Office	

Created at 10/5/2012 11:06 AM by AD2008R2\Administrator  
Last modified at 9/16/2014 4:10 PM by System Account

Close

user1... | Demo Content S... | Personal Setting... | SAP Logon 730 | Winshuttle

# Resolving WF Participants – Workflow



## Assign from User AD/SP Profile Lookup

- In the workflow

**Swimlane Collection Editor**

Members:

- 0 Originator
- 1 **Manager**
- 2 PlantApprover
- 3 ProcessOwner

Manager properties:

<b>Participant</b>	
Description	
Group	MyMillCreek Member
Name	Manager
Type	PersonFromRole
User	
<b>UI Support</b>	
IncludeSelf	True
ParticipantResolve	GetFromUserProfile
ParticipantResolve	(Collection)

Buttons: Add, Remove, OK, Cancel

**Valuepair Collection Editor**

Members:

- 0 portalroot
- 1 column

portalroot properties:

<b>Arguments</b>	
Name	portalroot
Value	http://mymillcreek...

**Valuepair Collection Editor**

Members:

- 0 portalroot
- 1 **column**

column properties:

<b>Arguments</b>	
Name	column
Value	Manager ...



# Resolving WF Participants



## Topics

- What is it?
- Participant Resolution in the Workflow
- **Participant Resolution in the Form**
- Examples
  - “Mine” Group scenario
  - Other Examples

# Resolving WF Participants – Form

## Assign from SharePoint List – In the Form



### WF Participant Control

### Field Properties from Data Connection

Results:

Plant	1000
Approver for Plant (from SP List Lookup):	Winshuttle User1

**WINSHUTTLE**™



# Resolving WF Participants - Form



## Assign from User AD/SP Profile Lookup

- In the Form – OPTIONAL  
(Already resolved in workflow)

WS.CurrentUser Properties

Data Current User Info Size Advanced

Full Name XPath: User Name XPath:

Email XPath: Task Name XPath:

Login Name XPath: Task Description XPath:

LoginName

Current Date XPath: User ID XPath:

☐ Auto Refresh

OK Cancel Apply

WS.Query Properties

Data Query Size Advanced

Data Source

☐ InfoPath Data Source Query:

☐ Connection String

☒ User Profile Name Field (Portal Only)

LoginName

Portal Root: http://mymillcreek

Invocation Settings

☒ Run At Start Ordinal: 10

☐ Run At End Set Fields: ManagerApprover=Manager

☐ Run When Field Changes:

☐ Append To Repeating Group (if applicable)

☐ Clear Fields When Empty Return

Empty Message:

OK Cancel Apply

Form Submitter Login Name: AD2008R2\wsuser1

Manager Approver (from SP/AD Profile Lookup): AD2008R2\maxc

# Resolving WF Participants - Form

## LDAP Query



ShareVis.Query Properties

Data Query Size Advanced

Data Source

☐ InfoPath Data Source

☒ Connection String

Idap://DC=wse,DC=wsmain,DC=

User Profile Name Field (Portal Only)

Portal Root:

Query:

```
{&(objectClass=user)
[samaccountname=
[//my:myUserName]]);&(sartm
ent,manager,l,title,co,st,telepho
neNumber,distinguishedName,
userPrincipalName
```

Invocation Settings

☒ Run At Start Ordinal: 100

☐ Run At End Set Fields: myDepartment = department, myMar

☐ Run When Field Changes:

☐ Append To Repeating Group (if applicable)

☐ Clear Fields When Empty Return

Empty Message:

OK Cancel Apply

Fields

Drag a field to add it to the form.

Fields:

- myFields
  - myName
  - myDName
  - myLoginName
  - field2
  - myUserName
  - myManager
  - myDepartment
  - field4
  - field5
  - field6
  - myEmail
  - field7
  - myManagerName
  - myManagerEmail

Show details

Actions

ShareVis.CurrentUser Properties

Data Current User Info Size Advanced

Full Name XPath: myName

User Name XPath: myUserName

Email XPath:

Task Name XPath:

Login Name XPath: myLoginName

Task Description XPath:

Current Date XPath:

User ID XPath:

☐ Auto Refresh

OK Cancel Apply

WINSHUTTLE™



# Resolving WF Participants - Form

## LDAP Query

Connection String: //DC=wse,DC=wsmain,DC=local

Query:

```
(&(objectClass=user)
(samaccountname=[//my:myUserName]));
department,manager,l,title,co,st,telephoneNumber,
distinguishedName, userPrincipalName
```

## Mapping to Form Fields

```
myDepartment = department,
myManager=manager,
myDName=distinguishedName,
myEmail=userPrincipalName
```



# Resolving WF Participants - Example



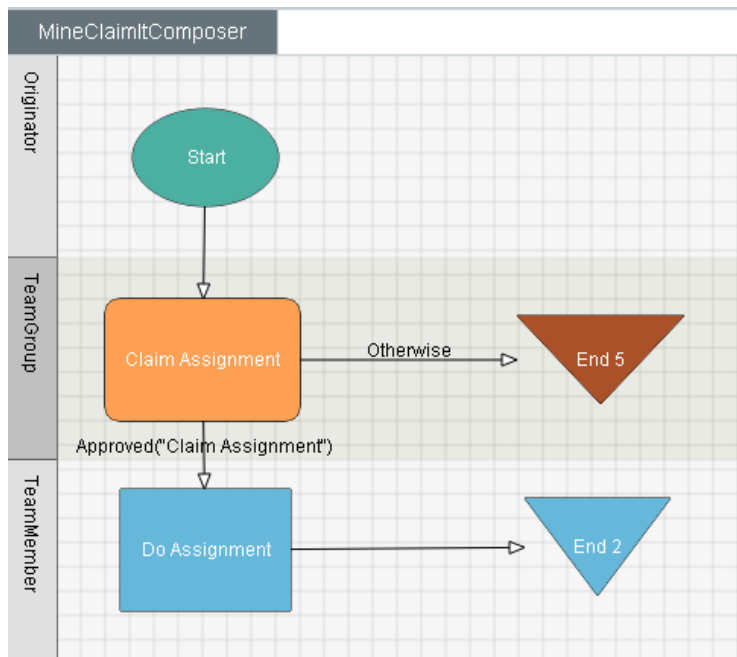
## “Mine” Group scenario



- Assignment goes to a group (Approval by team)
- One person claims it as their work (Approve)
- Work removed from group queue (Activity)

# Resolving WF Participants - Example

## “Mine” Group scenario



Current User

Name	Current User19
Label	Current User
Auto Refresh	False
Current Date	- Select -
E-Mail	- Select -
Full Name	Claimer
Login Name	- Select -
Task Description	- Select -

Workflow  
Participant:  
TeamMember

SWIMLANE:

TeamMember

☐ USE SYSTEM CONTROL:

FIELD:

☐ ALLOW NONE

☐ DEFER LOADING

☒ USE FORM VALUES:

LOGIN NAME FIELD:

FULL NAME FIELD:

Claimer

E-MAIL FIELD:

SWIMLANE BEHAVIOR:

Replace



# Resolving WF Participants - Example

## Routing to Approver based on Total Amount

- SP List lookup Name and Title of Approver in Form



Text Box Properties

Data Display Size Advanced

Binding

Field name: MgmtApproverTitle

Data type: Text (string)

Default Value

Value: @ApproverTitle[@MinApprovalAmount <= TotalExtendedPrice]

Example: Sample Text

☒ Refresh value when formula is recalculated

Insert Formula

Formula:

@ApproverTitle[@MinApprovalAmount <= TotalExtendedPrice and @MaxApprovalAmount >= TotalExtendedPrice]

Insert Field or Group... Insert Function... Verify Formula

☐ Edit XPath (advanced)

OK Cancel

WS.WorkflowParticipant Properties

Data Workflow Participant Size Advanced

Swimlane: Management Approver

Workflow Definition Name: POservices

Swimlane Behavior

☐ Nothing ☐ Add ☒ Replace

When Already Assigned

☐ Nothing ☐ Participant(s) ☐ Reassignment ☐ Add To Team

Rerun Pool Query When These Change:

Swimlane: ☐ Use System Control ☒ Use Form Values

XPath Location:

☐ Allow "None" ☐ Defer Loading

XPath Login Name Location: MgmtApproverName

XPath Full Name Location:

XPath Email Location:

☐ Comma-Separated Parsing

OK Cancel Apply

# Resolving WF Participants - Example



## Routing to Approver based on Total Amount

- SharePoint List for Lookup

MinApprovalAmount ▼	MaxApprovalAmount ▼	ApproverName ▼	ApproverTitle ▼
0	25,000	Winshuttle User1	Manager
25,000.01	250,000	Max Chaya	Director
250,000.01	1,000,000	Monica Prins	VP
1,000,000.01	5,000,000	Winshuttle User1	Sr VP
5,000,000.01	10,000,000	Max Chaya	BA President

- Form field FILTER

Specify Filter Conditions

Display data that meets the following conditions:

MinApprovalAmount ▼	is less than or equal to ▼	TotalExtendedPrice ▼	and ▼	Delete
MaxApprovalAmount ▼	is greater than or equal to ▼	TotalExtendedPrice ▼	And »	Delete

OK Cancel

# Resources



## Links to Documentation

- **Designer:**  
<http://winshuttle-help.s3.amazonaws.com/designer/winshuttle-designer-participant-resolvers-reference-guide-home.htm>
- **Composer:**  
<http://winshuttle-help.s3.amazonaws.com/composer/composer-participant-resolvers-referenceguide-home.htm>

# Questions?



**WINSHUTTLE**™





**WINSHUTTLE™**