

Winshuttle Design Patterns:

What/Where/How?

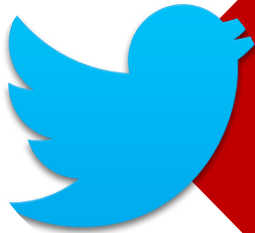
Tiffani Marsing | Heather Oebel | Winshuttle



Introduction



App – Winshuttle

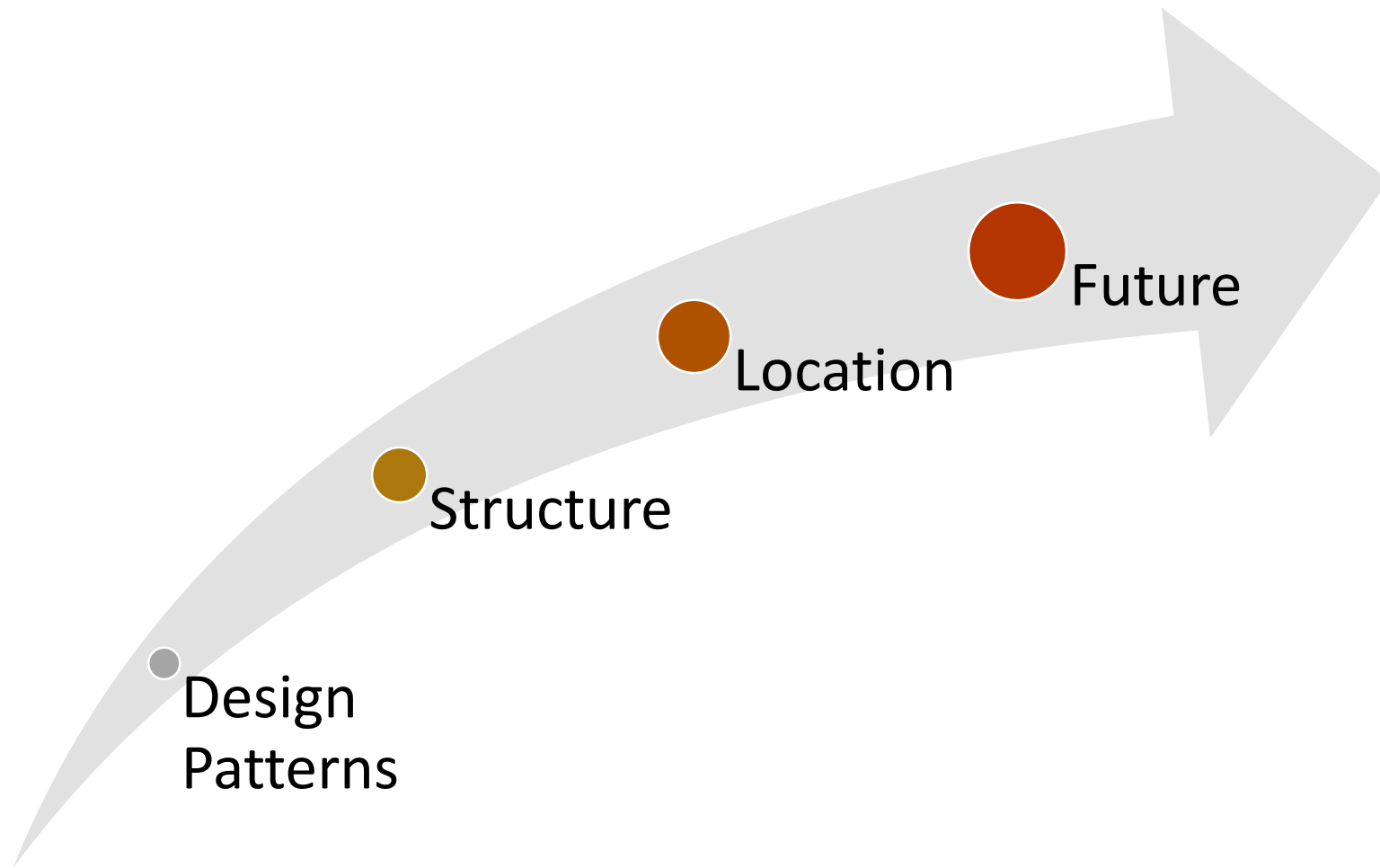


#WUG2014 – Twitter



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Introduction



What is a Design Pattern?



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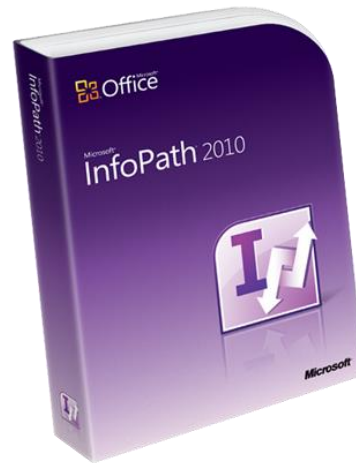
What is a Design Pattern?



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WINSHUTTLE™
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What is a Design Pattern?



How did we establish the content?

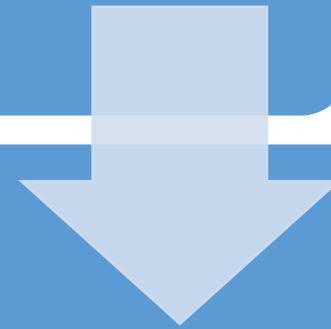


What is the Structure of the Pattern?



Design Pattern (name)

- Brief Description
- Problem
- Solution
- Results



Design Notes (if applicable)

- Script
- Workflow
- Form

What is the Structure of the Pattern?



Design Pattern Name

Role-specific form view

Using different views for each role (e.g. Originator, Manager, Approver, etc.) in a workflow associated with a form is useful because most roles will have a different responsibility and require different functionality from the same form. By creating a different view for each role, users will see only what they need to complete their task in the form.

Additionally you can restrict what a user can do based on their role in the workflow. For example, you might require approval before something can be uploaded to SAP. In this case, only the user with a role that comes after the approval task in the workflow will have the ability to upload data to SAP.

What is the Structure of the Pattern?



Design Pattern Name (cont'd)

Problem

Each user needs to have a different responsibility and/or functionality in the same form.

Solution

Create a different view of the same form for each role represented in the workflow associated with a form. Each view can show different fields and allow different functionality, thus reducing the form to only what each user needs for their responsibility.

Results

By adding a different view for each role's responsibility it allows the form to be more efficient and user friendly by reducing the amount of time needed to process each form.

What is the Structure of the Pattern?



Design Pattern Name (cont'd)

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Design Pattern Notes

Form design notes - role-specific form views

After you have created the view(s) in Winshuttle Designer and generated your InfoPath Form, you should see the same list shown in Designer in InfoPath each time it is launched. You can see the list of views in InfoPath under the Page Design tab under the drop down for views. Now you can start designing each form view within InfoPath.

It's recommended to:

1. Start with a Designer View that has all functionality you need for the entire form.
2. Test all functionality for the entire form from the Designer View, this will make copy & paste easier later for the additional views,
3. After confirmation that the form is performing correctly you can copy and paste each part to the different views as necessary.



Winshuttle Best Practice Guide

- <http://winshuttle-help.s3.amazonaws.com/best-practices/winshuttle-master-data-design-patterns.htm>
- Help Center → Reference Guides → Winshuttle Best Practice Guide → Winshuttle Solution Accelerators

Where to find MD Design Patterns?



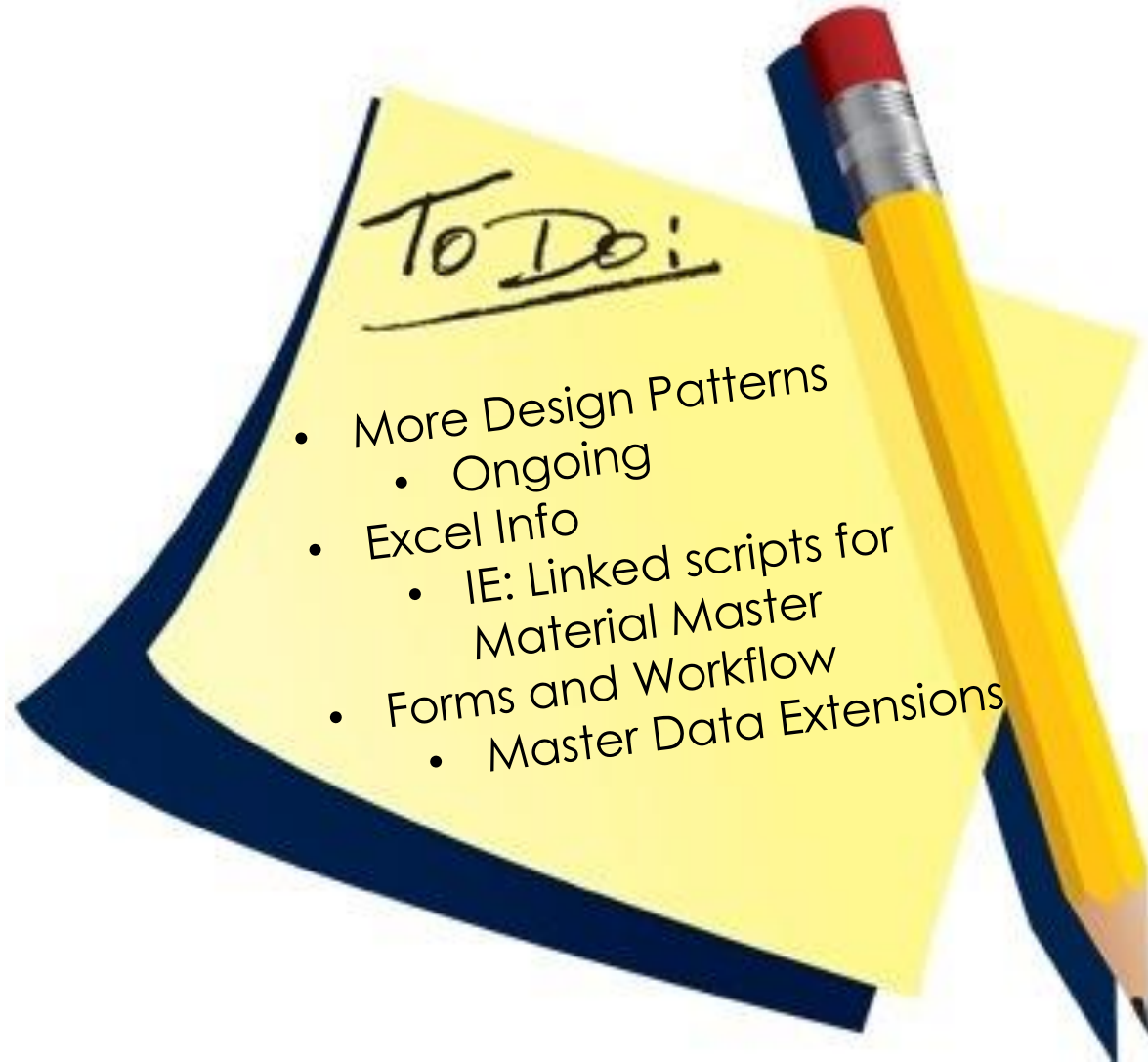
Main Web Site

- www.winshuttle.com
- Resources → More resources → Best Practices → Winshuttle Solution Accelerators

Plans for future content



Plans for future content



- To Do:
- More Design Patterns
 - Ongoing
- Excel Info
 - IE: Linked scripts for Material Master
- Forms and Workflow
 - Master Data Extensions

Plans for future content



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