# Workflows and Web UIs

APP 242 - Course outline

AUTHOR: Stibo Systems MDM Academy

CONFIDENTIALITY LEVEL:

Public

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## Target Group

This course is targeted towards application consultants or other roles responsible for transforming the conceptual design of a STEP solution into a functional configuration.

## Pre-Requisites for Participation

- Stibo Systems Academy courses (or the knowledge taught in this course acquired in other ways)
  - MDM 101 - MDM Solution Fundamentals
  - APP 240 - Data Modeling

- Experience with relational databases, object-oriented design and general MDM knowledge will be helpful for participants in this course.

- At least one year of application consultancy experience and/or system implementation.

## Course Duration

- The face-to-face course duration is 4 days.

- For the online version of this training, we would recommend planning an effective duration of 2.5 days.

## Training Delivery Method

☒ In person classroom
☐ Virtual classroom
☒ Self-paced online

The course activities will be a combination of lectures, case studies in teams, problem solving exercises and presentations by the trainees.

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### Course Purpose

In this course, you will get the knowledge and skills to build functional workflows and web user interfaces in STEP to meet the customer's business requirements.

### Course Objectives

Upon completion of this course, participants will be able to:

1. Evaluate completeness and accuracy of requirements used to design STEP Workflows and Web UIs.

2. Create and maintain Workflows and apply plug-in Business Rules that support Workflows.

3. Create and maintain Web UIs.

4. Demonstrate that the completed configuration of the STEP Workflow and Web UI meets the specified requirements.

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### ☑ Learning Objectives

The objectives below describe precisely what is taught during the training: (please note that the learning objectives can belong to more than one course objective).

> **Course Objective 1 - Evaluate completeness and accuracy of requirements used to design STEP Workflows and Web UIs.**

**Learning objectives**:

- Identify that all needed Business Rule elements are present in the specification documentation.
- Identify that all needed Web UI elements are present in the specification documentation.
- Identify that all needed Workflow elements are present in the specification documentation.
- Indicate if specified Business Rule requirements can be met with existing STEP Business Rule plug-ins.
- Indicate that specified Workflow requirements can be met with existing STEP components.
- Indicate that specified Web UI requirements can be met with existing STEP components.

> **Course Objective 2 - Create and maintain Workflows and apply plug-in Business Rules that support Workflows.**

**Learning objectives**:

- Differentiate between the available Workflow State types and where they are used in a Workflow.
- Explain where conditions and actions are applied within a STEP Workflow.
- Justify the use of Parallel and Cluster states within a STEP Workflow.
- Explain the different methods of initiating items into Workflows.
- Classify assignees to relevant states/tasks within a Workflow.
- Define and manage Workflow deadlines.
- Prepare Workflow monitoring profiles.
- Implement Workflow Views and Mapping to meet requirements of unique tasks and users.
- Construct bound and unbound workflow variables.

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> **Course Objective 3 - Create and maintain Web UIs.**

**Learning objectives**:

- Differentiate between the Web UI types.

- Justify the effectiveness of the Web UI design to meet specified requirements with optimized user experience and performance.

- Convert the Web UI side panel to display specified hierarchies, workflow states, imports, and basket.

- Give examples of the Web UI style components and settings to produce the desired look and feel.

- Identify when privileges could/should be used for multiple user roles, or when a separate Web UI is needed.

- Differentiate between the Web UI components used to display attributes (including meta data and thumbnails) and the use cases for each.

- Define how reference links are displayed on a Web UI screen using the recommended Web UI components and apply optimal display methods.

- Indicate the appropriate buttons for the Node Details screen using optional format types and understand when buttons are enabled/disabled.

- Differentiate between the commonly used screen types available for a Node Details screen.

- Comprehend how to control permissions to the Web UI designer

- Explain the difference between each view type option of a Node List screen.

- Explain the difference between the available Action types on a Node List.

- Implement an "Advanced Search" screen.

- Indicate the location of a Web UI XML and how to locate specific components.

- Organize the screen priority using "Mappings", and how to configure the screen mapping conditions.

- Prepare a unique Task list screen for displaying items in a workflow state.

- Articulate the process of adding widgets to the homepage.

- Give examples of Web UI settings that can improve performance.

- Manage import and export functionality in the Web UI, including configurations, settings, and Background Processes.

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> **Course Objective 4 - Demonstrate that the completed configuration of the STEP Workflow and Web UI meets the specified requirements.**

**Learning objectives**:

- Test that STEP Workflows meet requirements specified in documentation.

- Test that Web UIs meet requirements specified in documentation.

- Justify the design of completed STEP Workflows and Web UIs.

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**About Stibo Systems**

Stibo Systems is a leading enabler of trustworthy data through AI-powered master data management. Built on a robust and flexible platform, our SaaS solutions empower enterprises around the globe to deliver superior customer and product experiences. Our trusted data foundation enhances operational efficiency, drives growth and transformation, supports sustainability initiatives and bolsters AI success. Headquartered in Aarhus, Denmark, Stibo Systems is a privately held subsidiary of Stibo Software Group, which guarantees the long-term perspective of the business through foundational ownership. More at **www.stibosystems.com**.