

# Training Manual

# Work with Workflows:

# Exercises

SharePoint 2013 – GTA Platform

**Prepared By:** GeorgiaGov Interactive

**Support:** For further assistance, fill out a Support Request at <http://portal.georgia.gov/support>

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## How to Use this Guide

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These exercises are meant to be used during the Work with workflows session to give you hands-on experience with SharePoint 2013. Your instructor will provide you with the URL, username, and password for the training site you will use for these activities.

**Naming:** To be able to distinguish the files you're creating from the files of other students, you will be asked to append your initials to the end of the Titles of content you create. For example, John Doe (initials "JD") would name the Site Page in Exercise 1: "About DCH – JD."

## Accessing Exercise Files

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You will find all the exercise files for this training session at  
[https://mygta.ga.gov/portal/spsupport/sptraining/SP\\_Training\\_Resources](https://mygta.ga.gov/portal/spsupport/sptraining/SP_Training_Resources)

## Exercise 1: Set up Workflow

### 1.1 Set up Workflow on a Library

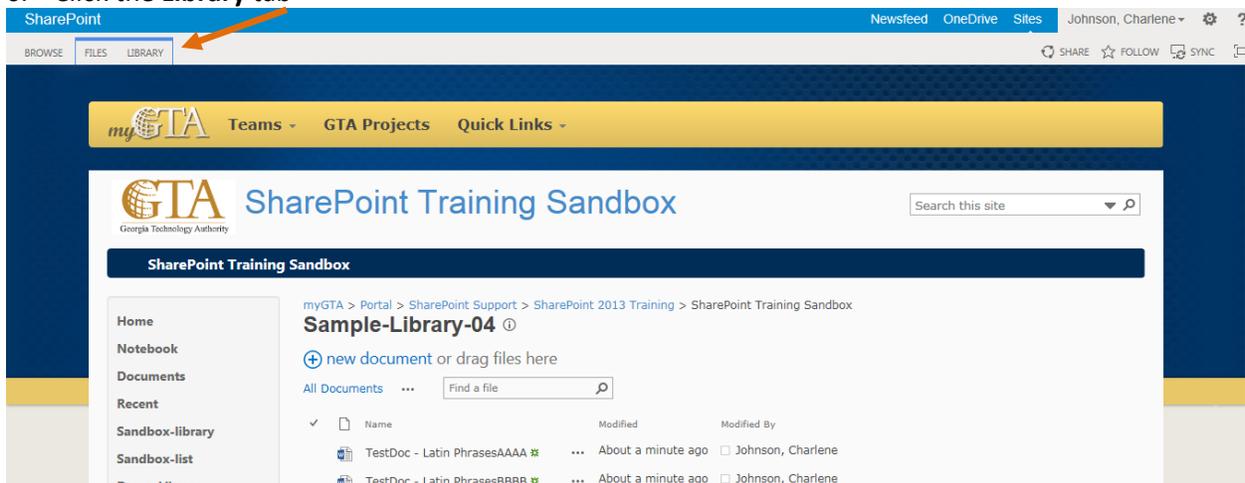
The Content Owner will determine the workflows that will be available for the library.

#### Exercise Files:

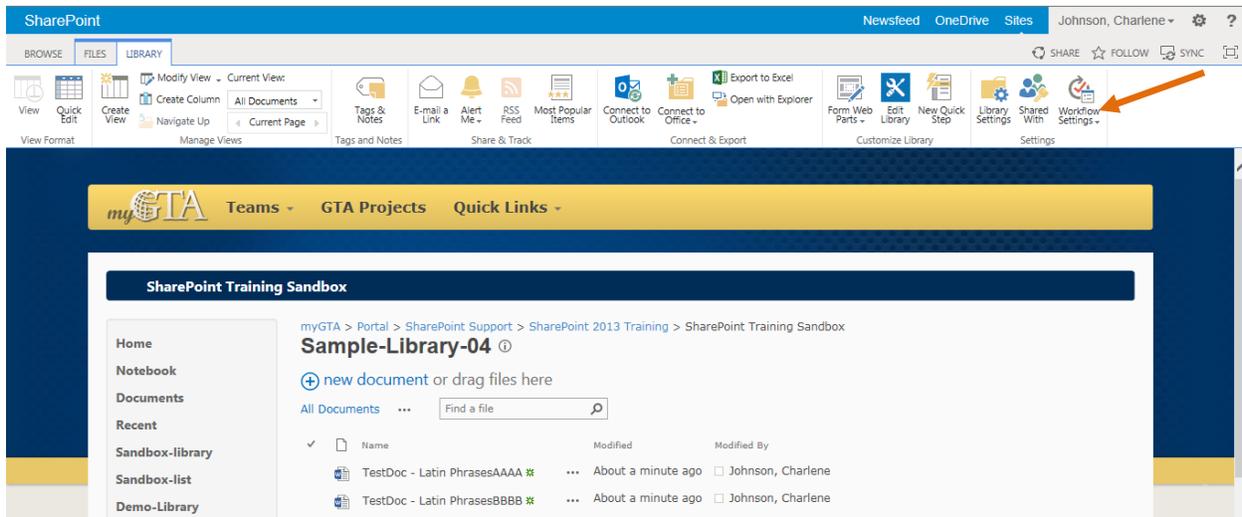
- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox**
  - **Library Name: Sample-Library-xx**, where xx is the team number assigned to your team

To set up a workflow, the Content Owner will,

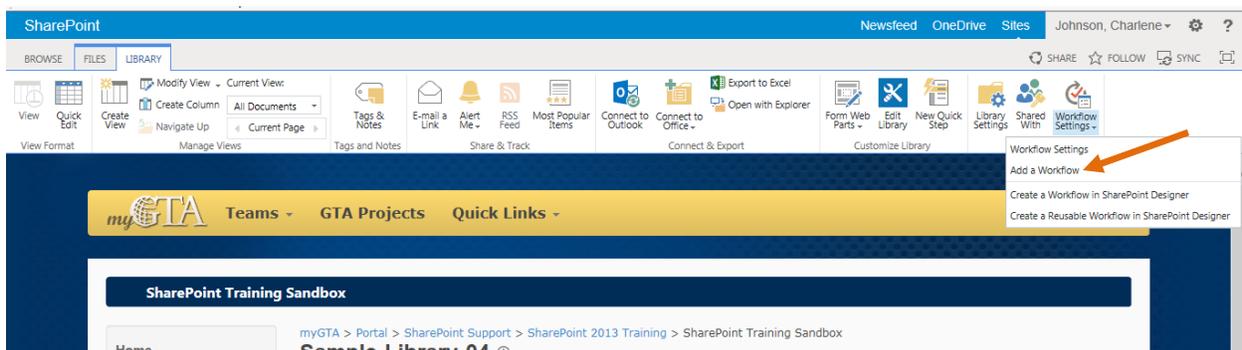
1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Training Sandbox**
5. From the Quick Launch, click on **Sample-Library-xx** for your team
6. Click the **Library** tab



7. SharePoint will display the **Library Ribbon**
8. On the ribbon, click **Workflow Settings**



9. SharePoint will display the drop down
10. From the drop down click **Add a workflow**



11. SharePoint will display **Settings > Add a Workflow** page
12. Select the **workflow template: Approval – SharePoint 2010**
13. Enter a **unique name** for the workflow: **TestWorkflow-xx**, where xx is your team number
14. Accept the default values
15. Click **Next**

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myGTA Georgia Technology Authority SharePoint Training Sandbox

myGTA > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox

Settings > Add a Workflow

**Workflow**

Select a workflow to add to this document library. If a workflow is missing from the list, your site administrator may have to publish or activate it.

Select a workflow template:

- Approval - SharePoint 2010
- Collect Feedback - SharePoint 2010
- Collect Signatures - SharePoint 2010
- Disposition Approval

Description: Routes a document for approval. Approvers can approve or reject the document, reassign the approval task, or request changes to the document.

**Name**

Enter a name for this workflow. The name will be used to identify this workflow to users of this document library.

Enter a unique name for this workflow:

TestWorkflow-xx

**Task List**

Select the name of the task list to use with this workflow, or create a new one.

Select a task list:

Tasks

Description: Task list for workflow.

**History List**

Select the name of the history list to use with this workflow, or create a new one.

Select a history list:

Workflow History

Description: History list for workflow.

**Start Options**

Specify how this workflow can be started.

- Allow this workflow to be manually started by an authenticated user with Edit Item permissions.
  - Require Manage Lists Permissions to start the workflow.
- Start this workflow to approve publishing a major version of an item.
- Creating a new item will start this workflow.
- Changing an item will start this workflow.

Next Cancel

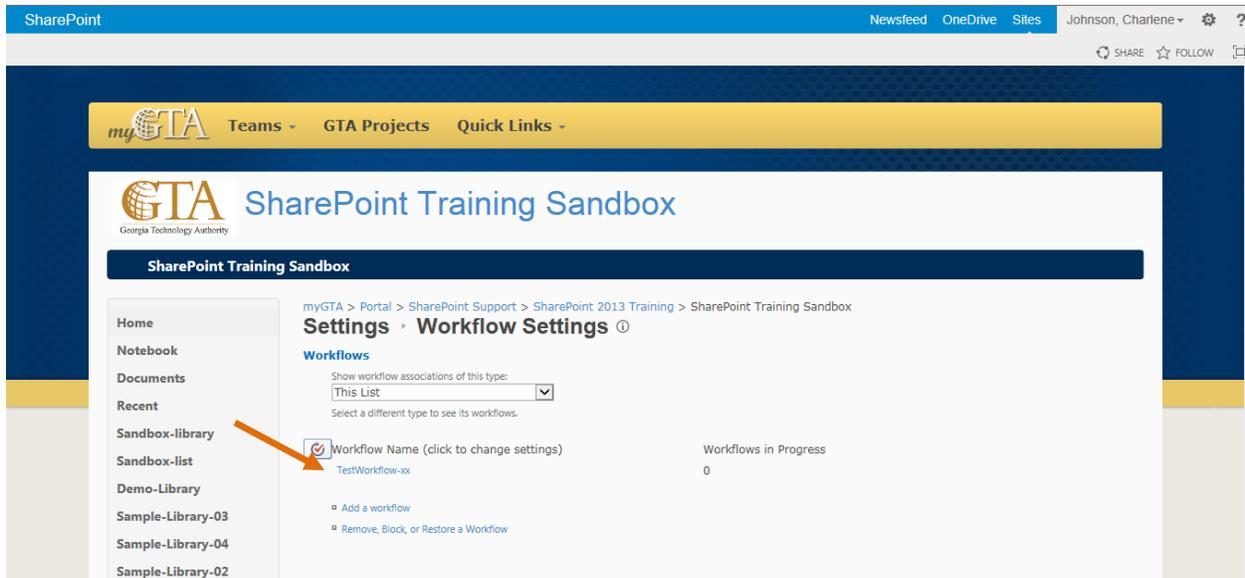
16. SharePoint will display **Settings > Change a Workflow** page
17. Enter the name of a team member as an **Approver**, e.g. sp4
18. Enter the **Request**: Please approve this document within the next couple of days
19. Select the **Due Date for All Tasks**: 31 August 2014
20. Assign the **CC** : Charlene Johnson
21. Click **Save**
22. For this exercise, the Content Owner will assign the following user roles:
  - Submitter - the user with edit permissions who will add the workflow to the document
  - Approver - the user who will receive the notification and approve or reject the document

SharePoint Training Sandbox

myGTA > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox  
**Settings** ▸ **Change a Workflow** ▸ **TestWorkflow-xx** ⓘ

Approvers	<table border="1"> <thead> <tr> <th>Assign To</th> <th>Order</th> </tr> </thead> <tbody> <tr> <td>sp4</td> <td>One at a time (serial)</td> </tr> </tbody> </table> <input type="checkbox"/> Add a new stage Enter the names of the people to whom the workflow will assign tasks, and choose the order in which those tasks are assigned. Separate them with semicolons. You can also add stages to assign tasks to more people in different orders.	Assign To	Order	sp4	One at a time (serial)
Assign To	Order				
sp4	One at a time (serial)				
Expand Groups	<input checked="" type="checkbox"/> For each group entered, assign a task to every individual member and to each group that it contains.				
Request	Please approve this document within the next couple of days  This message will be sent to the people assigned tasks.				
Due Date for All Tasks	8/31/2014 The date by which all tasks are due.				
Duration Per Task	<input type="text"/> The amount of time until a task is due. Choose the units by using the Duration Units.				
Duration Units	Day(s) Define the units of time used by the Duration Per Task.				
CC	johnson, charlene Notify these people when the workflow starts and ends without assigning tasks to them.				
End on First Rejection	<input type="checkbox"/> Automatically reject the document if it is rejected by any participant.				
End on Document Change	<input type="checkbox"/> Automatically reject the document if it is changed before the workflow is completed.				
Enable Content Approval	<input type="checkbox"/> Update the approval status after the workflow is completed (use this workflow to control content approval).				
<input type="button" value="Save"/> <input type="button" value="Cancel"/>					

23. SharePoint will display the **Settings > Workflow Setting** and your workflow will be included in the list of available workflows



## Exercise 2: Add a Document Workflow

### 2.1 Add a Document Workflow

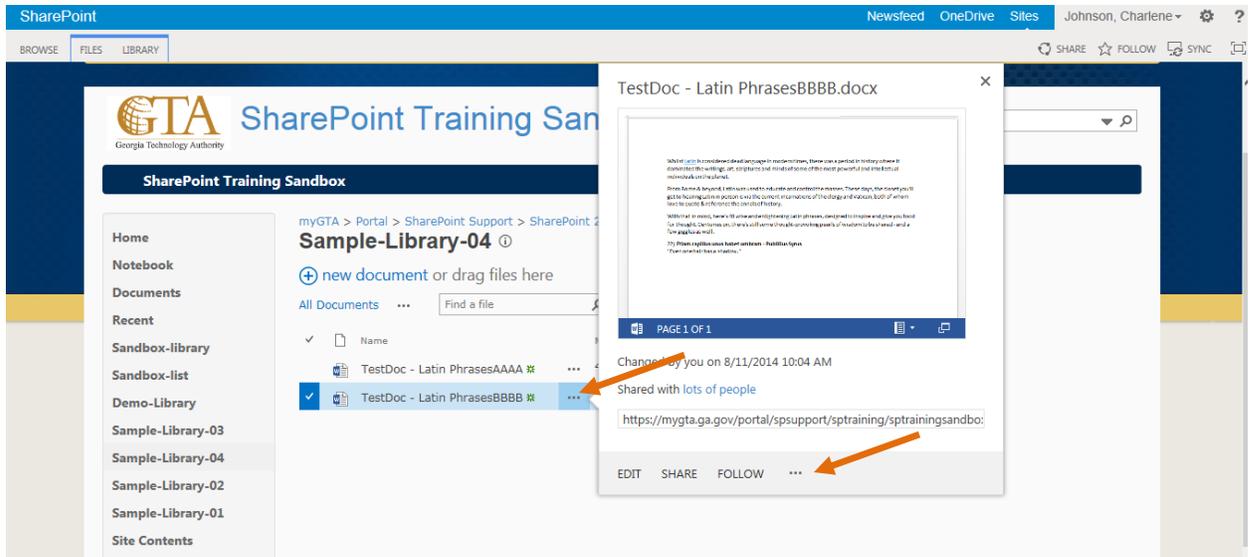
The submitter is a user with edit permission can add an available workflow to a document.

#### Exercise Files:

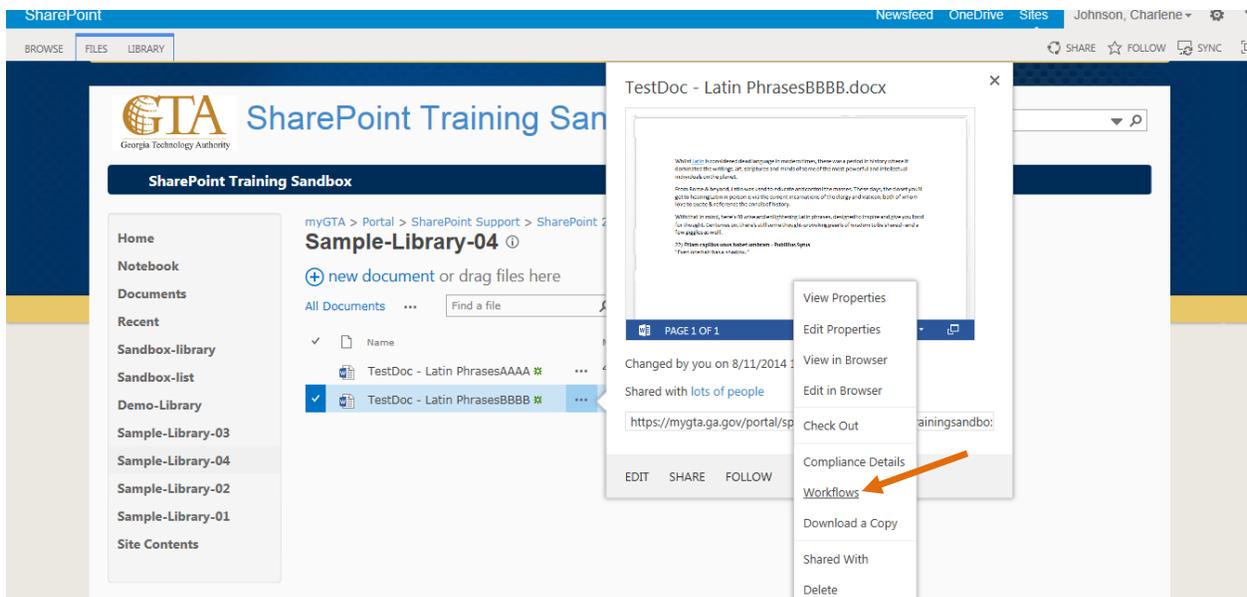
- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox**
  - **Library Name: Sample-Library-xx**, where xx is the team number assigned to your team
  - **Document Name: TestDoc-Latin Phrases** (any)
  - **TestWorkflow-xx**, where xx is your team number

For this exercise, the submitter will add a workflow to a document

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Training Sandbox**
5. From the Quick Launch, click on **Sample-Library-xx** for your team
6. Select a document and click the ellipses and then click the ellipses in the pop up



7. SharePoint will display the drop down
8. On the drop down, click **Workflows**



9. SharePoint will display the workflows
10. In the **Start a New Workflow** area, click the workflow assigned to your team to manually start it: **TestWorkflow-xx**, where xx is your team number

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## SharePoint Training Sandbox

SharePoint Training Sandbox

myGTA > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox

### Sample-Library-04: Workflows: TestDoc - Latin PhrasesBBBB

### Start a New Workflow

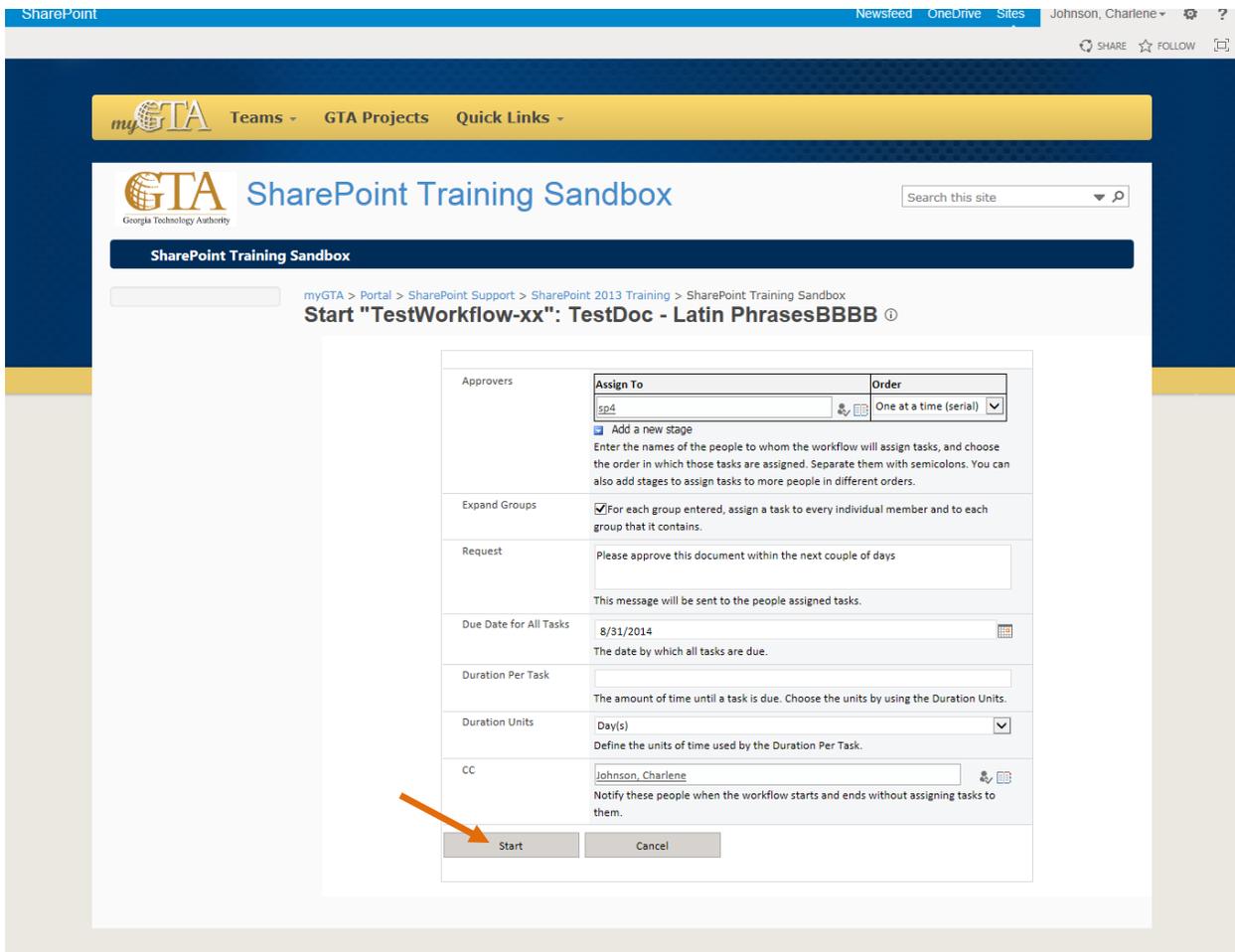
 TestWorkflow-xx  
Routes a document for approval. Approvers can approve or reject the document, reassign the approval task, or request changes to the document.

### Workflows

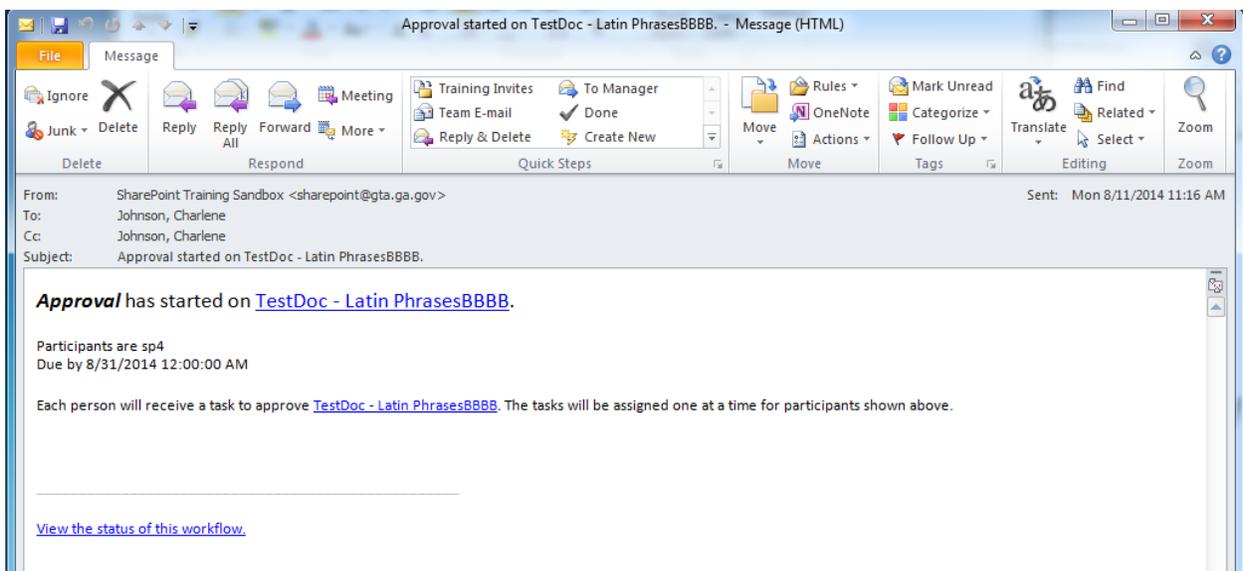
Select a workflow to view more details. [Show my workflows only.](#)

Name	Started	Ended	Internal Status
<b>Running Workflows</b>			
There are no running workflows on this item.			
<b>Completed Workflows</b>			
There are no completed workflows on this item.			

11. SharePoint will display **Start <Workflow Name>: <Document Name>**
12. Accept all the workflow defaults and click **Start**



13. The submitter will receive notification when the workflow is started.



## Exercise 3: Monitor Workflow Status

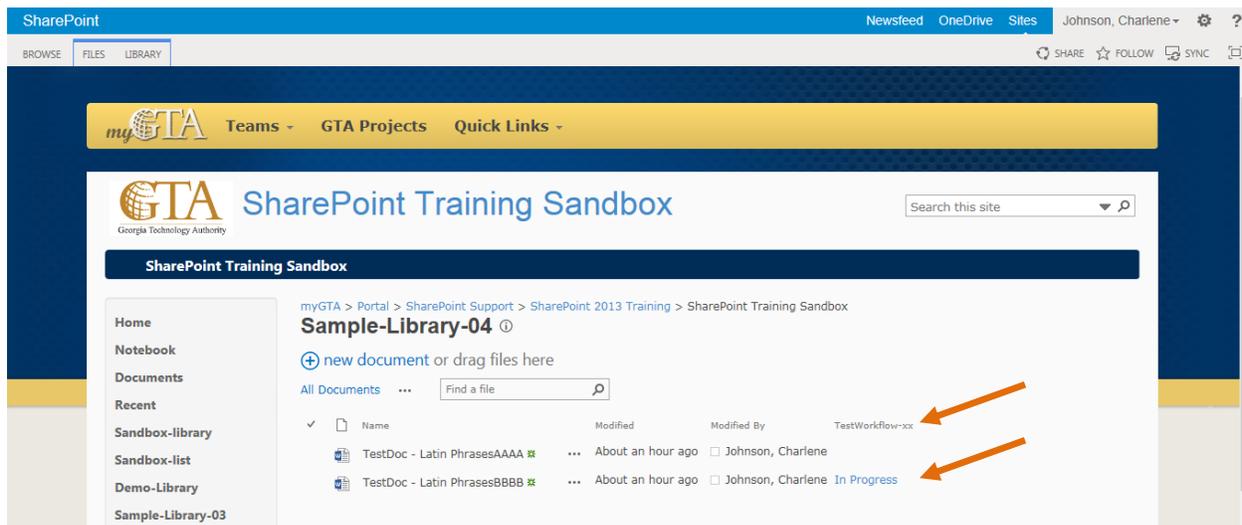
### 3.1 Display Workflow Status

SharePoint will add a workflow status column to the library and users can view the status of each document workflow.

#### Exercise Files: None

The status of the workflow document can be displayed

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Training Sandbox**
5. From the Quick Launch, click on **Sample-Library-xx** for your team
6. SharePoint will display the workflow document status
7. Click on the status, e.g. **In Progress**



The screenshot shows a SharePoint interface for a library named "Sample-Library-04". The breadcrumb path is "myGTA > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox". The library contains two documents: "TestDoc - Latin PhrasesAAAA" and "TestDoc - Latin PhrasesBBBB". The "TestDoc - Latin PhrasesBBBB" document has a workflow status of "In Progress", which is highlighted by two orange arrows. The interface includes a search bar, a navigation pane on the left, and a top navigation bar with "Teams", "GTA Projects", and "Quick Links".

Name	Modified	Modified By	TestWorkflow-xx
TestDoc - Latin PhrasesAAAA	About an hour ago	Johnson, Charlene	
TestDoc - Latin PhrasesBBBB	About an hour ago	Johnson, Charlene	In Progress

8. SharePoint will display the **Workflow Status**

SharePoint Training Sandbox

- Home
- Notebook
- Documents
- Recent
- Sandbox-library
- Sandbox-list
- Demo-Library
- Sample-Library-03
- Sample-Library-04
- Sample-Library-02
- Sample-Library-01
- Site Contents

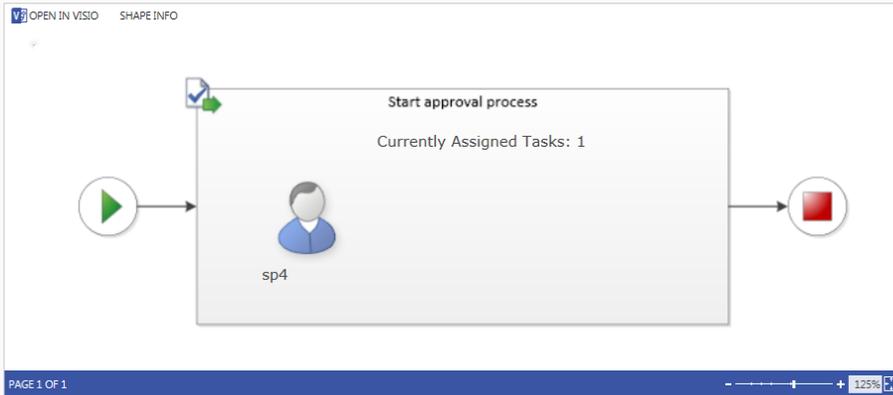
myGTA > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox

**Workflow Status: TestWorkflow-xx**

Workflow Information

**Initiator:** Johnson, Charlene      **Document:** TestDoc - Latin PhrasesBBBB  
**Started:** 8/11/2014 11:16 AM      **Status:** In Progress  
**Last run:** 8/11/2014 11:16 AM

**Workflow Visualization**



- ▀ Add or update approvers of Approval
  - ▀ Cancel all Approval tasks
  - ▀ Update active tasks of Approval
- If an error occurs or if this workflow stops responding, you can end it.
- ▀ End this workflow.

**Tasks**

This workflow created the following tasks. You can also view them in [Tasks](#).

<input type="checkbox"/>	Assigned To	Title	Due Date	Status	Related Content	Outcome
<input type="checkbox"/>	sp4	Please approve TestDoc - Latin PhrasesBBBB <span style="color: green;">NEW</span>	8/31/2014	Not Started	TestDoc - Latin PhrasesBBBB	

**Workflow History**

The workflow recorded these events.

<input type="checkbox"/>	Date Occurred	Event Type	User ID	Description	Outcome
<input type="checkbox"/>	8/11/2014 11:16 AM	Workflow Initiated	Johnson, Charlene	Approval was started. Participants: sp4	
<input type="checkbox"/>	8/11/2014 11:16 AM	Task Created	Johnson, Charlene	Task created for sp4. Due by: 8/31/2014 12:00:00 AM	

### 3.2 Manage Workflow History

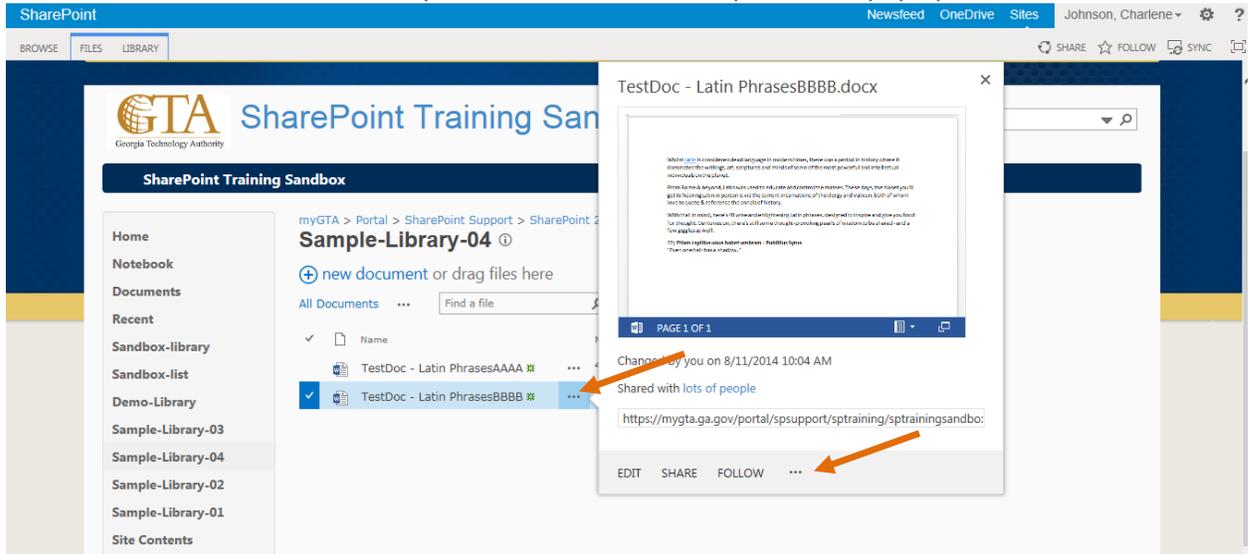
The workflow history for a workflow document can be displayed.

**Exercise Files:**

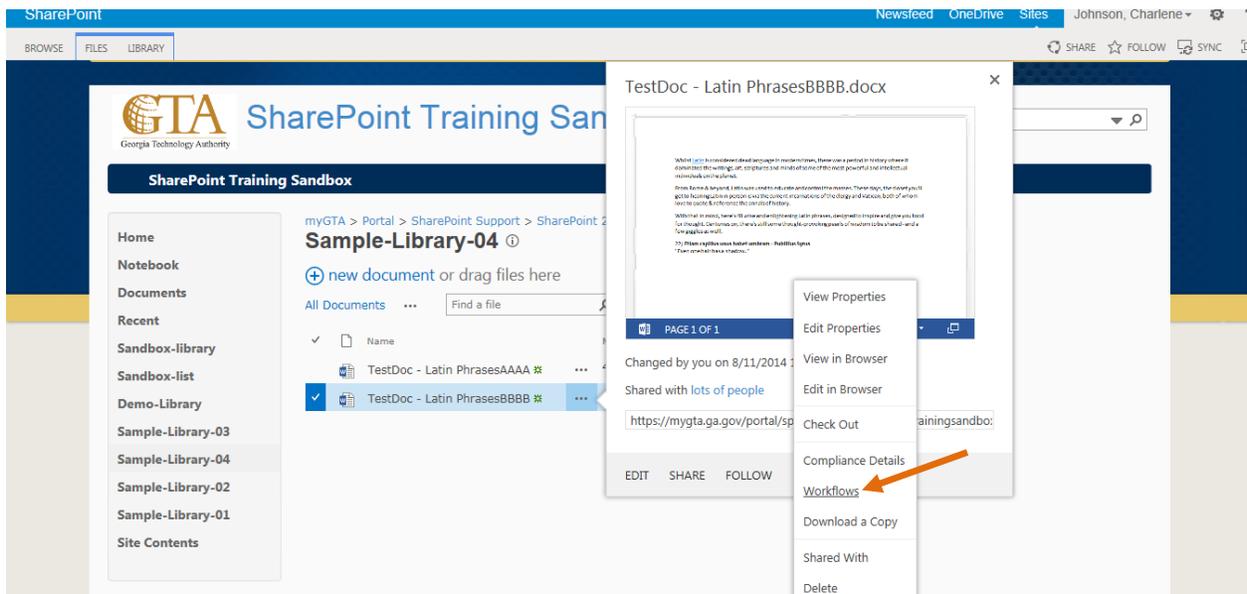
- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox**
  - **Library Name: Sample-Library-xx**, where xx is the team number assigned to your team
  - **Document Name: TestDoc-Latin Phrases** (any)
  - **TestWorkflow-xx**, where xx is your team number

To display the workflow history for a workflow document,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Training Sandbox**
5. From the Quick Launch, click on **Sample-Library-04**
6. Select a document and click the ellipses and then click the ellipses in the pop up



7. SharePoint will display the drop down
8. On the drop down, click **Workflows**



9. On the **Workflow Status** page, click the **Title** of a completed workflow, e.g. TestWorkflow-xx

SharePoint | Newsfeed | OneDrive | Sites | Johnson, Charlene | ?

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SharePoint Training Sandbox

myGTA > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox

### Sample-Library-04: Workflows: TestDoc - Latin PhrasesBBBB ①

[Start a New Workflow](#)

**TestWorkflow-xx**  
Routes a document for approval. Approvers can approve or reject the document, reassign the approval task, or request changes to the document.

### Workflows

Select a workflow to view more details. [Show my workflows only.](#)

Name	Started	Ended	Internal Status
<b>Running Workflows</b>			
There are no running workflows on this item.			
<b>Completed Workflows</b>			
TestWorkflow-xx	8/11/2014 12:29 PM	8/11/2014 12:39 PM	Approved
TestWorkflow-xx	8/11/2014 11:16 AM	8/11/2014 12:25 PM	Canceled

10. SharePoint will display the Workflow History

SharePoint | Newsfeed | OneDrive | Sites | Johnson, Charlene | ?

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## SharePoint Training Sandbox

myGTA > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox

### Workflow Status: TestWorkflow-xx

Workflow Information

**Initiator:** Johnson, Charlene      **Document:** TestDoc - Latin PhrasesBBBB  
**Started:** 8/11/2014 12:29 PM      **Status:** Approved  
**Last run:** 8/11/2014 12:39 PM

#### Workflow Visualization

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#### Tasks

This workflow created the following tasks. You can also view them in Tasks.

<input type="checkbox"/>	Assigned To	Title	Due Date	Status	Related Content	Outcome
<input type="checkbox"/>	Johnson, Charlene	Please approve TestDoc - Latin PhrasesBBBB	8/31/2014	Completed	TestDoc - Latin PhrasesBBBB	Approved

#### Workflow History

The workflow recorded these events.

<input type="checkbox"/>	Date Occurred	Event Type	User ID	Description	Outcome
<input type="checkbox"/>	8/11/2014 12:29 PM	Workflow Initiated	Johnson, Charlene	Approval was started. Participants: Johnson, Charlene	
<input type="checkbox"/>	8/11/2014 12:29 PM	Task Created	Johnson, Charlene	Task created for Johnson, Charlene. Due by: 8/31/2014 12:00:00 AM	
<input type="checkbox"/>	8/11/2014 12:39 PM	Task Completed	Johnson, Charlene	Task assigned to Johnson, Charlene was approved by Johnson, Charlene. Comments: I approve this document. Cj	Approved by Johnson, Charlene
<input type="checkbox"/>	8/11/2014 12:39 PM	Workflow Completed	Johnson, Charlene	Approval was completed.	Approval on TestDoc - Latin PhrasesBBBB has successfully completed. All participants have completed their tasks.

### 3.3 Navigate and Complete Workflow

You can use navigation to display and complete tasks for a workflow document.

#### Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox**
  - **Library Name:** Sample-Library-xx, where xx is the team number assigned to your team
  - **Document Name:** TestDoc-Latin Phrases (any)
  - **TestWorkflow-xx**, where xx is your team number

To use navigation to display and complete tasks for a workflow document,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Training Sandbox**
5. From the Quick Launch, click on **Sample-Library-xx** for your team
6. SharePoint will display the workflow document status
7. On the **Workflow Status** page, a click the **Title** of the task

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GTA SharePoint Training Sandbox  
Georgia Technology Authority

SharePoint Training Sandbox

myGTA > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox

### Workflow Status: TestWorkflow-xx

Workflow Information

**Initiator:** Johnson, Charlene      **Document:** TestDoc - Latin PhrasesBBBB  
**Started:** 8/11/2014 11:16 AM      **Status:** In Progress  
**Last run:** 8/11/2014 11:16 AM

#### Workflow Visualization

Start approval process  
Currently Assigned Tasks: 1

sp4

PAGE 1 OF 1

- ▢ Add or update approvers of Approval
- ▢ Cancel all Approval tasks
- ▢ Update active tasks of Approval

If an error occurs or if this workflow stops responding, you can end it.

- ▢ End this workflow.

#### Tasks

This workflow created the following tasks. You can also view them in Tasks.

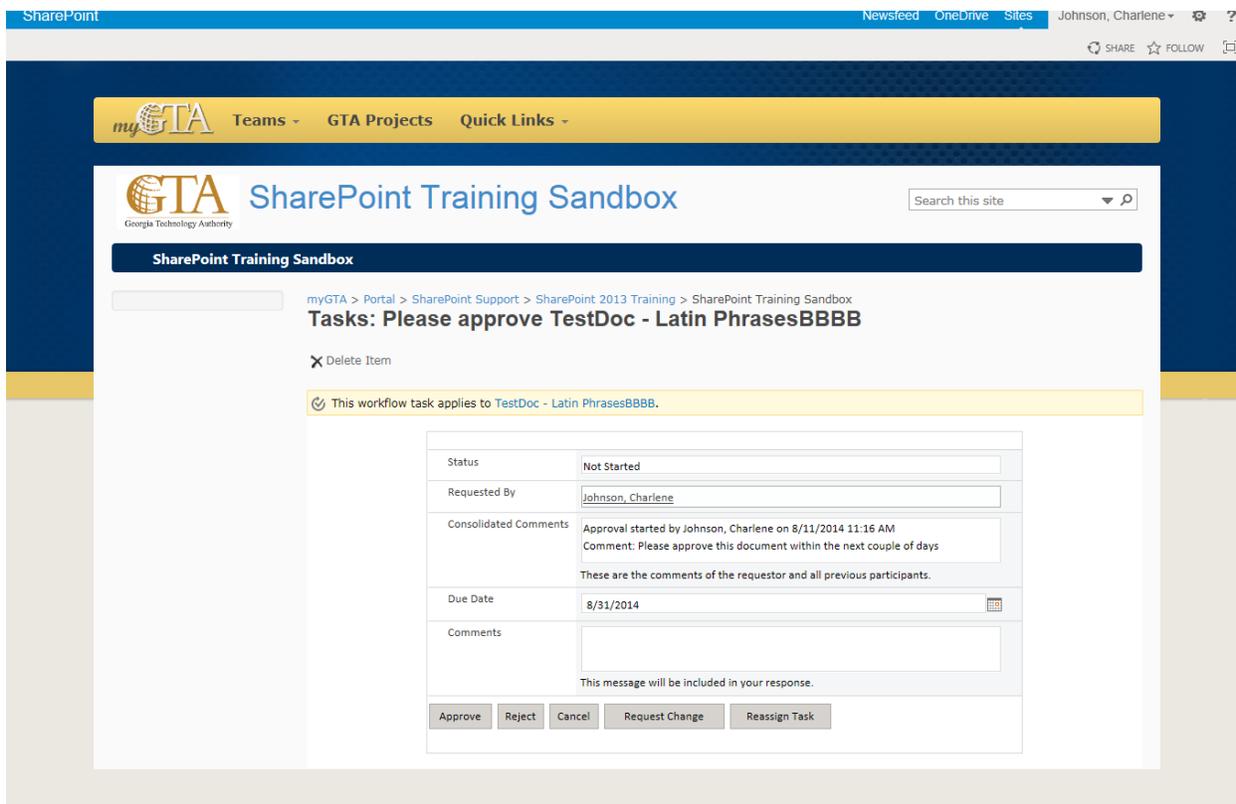
<input type="checkbox"/>	Assigned To	Title	Due Date	Status	Related Content	Outcome
<input type="checkbox"/>	sp4	Please approve TestDoc - Latin PhrasesBBBB <a href="#">View</a>	8/31/2014	Not Started	TestDoc - Latin PhrasesBBBB	

#### Workflow History

The workflow recorded these events.

<input type="checkbox"/>	Date Occurred	Event Type	User ID	Description	Outcome
<input type="checkbox"/>	8/11/2014 11:16 AM	Workflow Initiated	Johnson, Charlene	Approval was started. Participants: sp4	
<input type="checkbox"/>	8/11/2014 11:16 AM	Task Created	Johnson, Charlene	Task created for sp4. Due by: 8/31/2014 12:00:00 AM	

8. SharePoint will open the task and the user can add comments and complete tasks  
*Revised 03/03/2014*



## Exercise 4: Notify and Complete Workflow

### 4.1 Notify and Complete Workflow

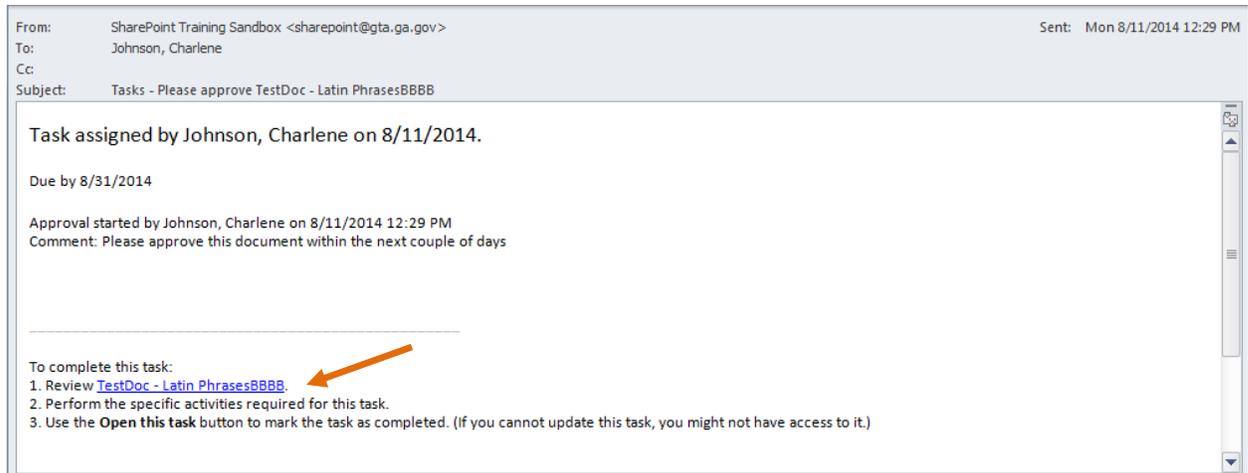
A user can receive a notification that contains a link to the document and the task. Then the user can click the link on the notification and complete the workflow tasks for a document.

#### Exercise Files:

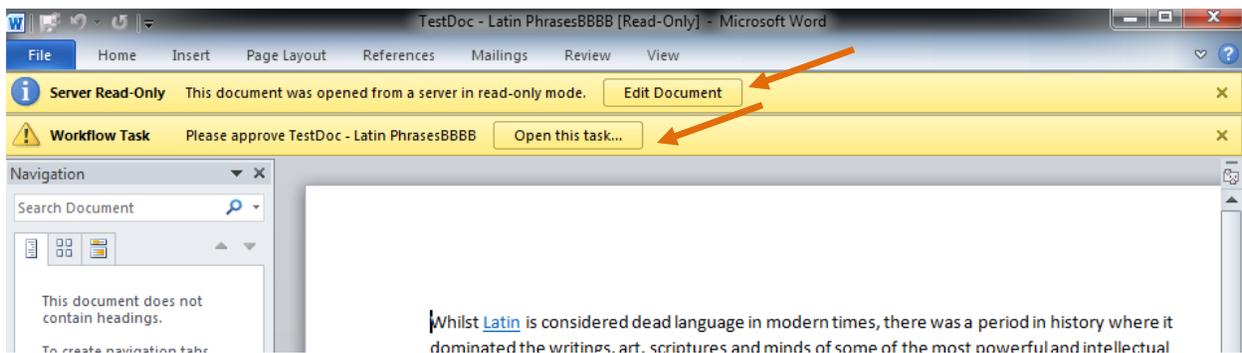
- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox**
  - **Library Name: Sample-Library-xx**, where xx is the team number assigned to your team
  - **Document Name: TestDoc-Latin Phrases** (any)
  - **TestWorkflow-xx**, where xx is your team number

To use a link to complete workflow tasks for a document,

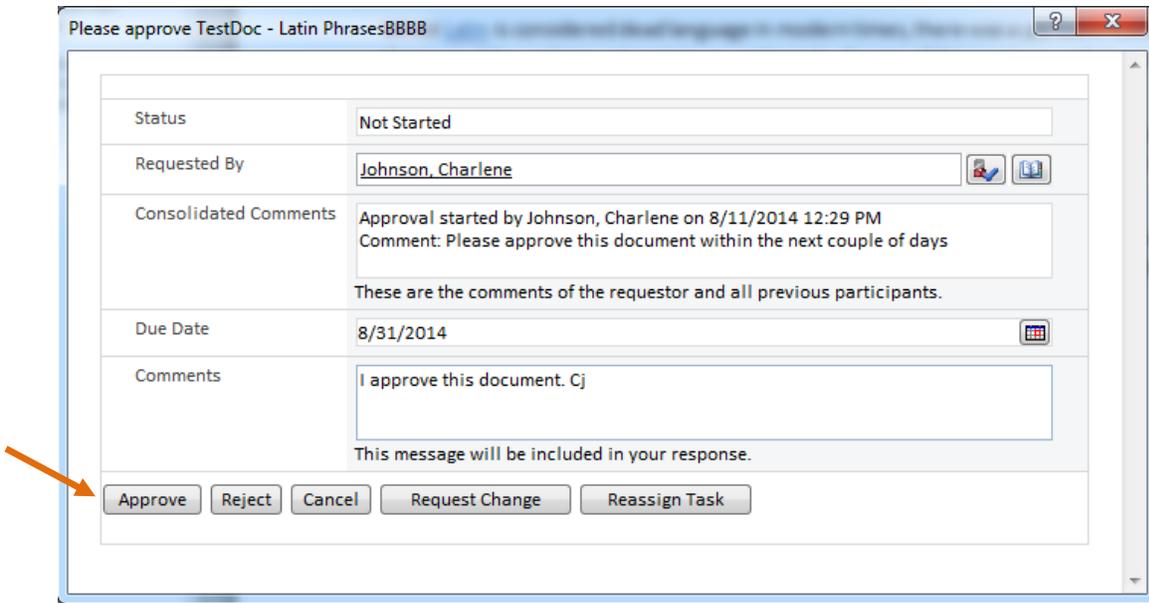
1. If you are the approver or reviewer, you will receive notification and you can click on the link to review the document and complete the task



2. SharePoint will allow you to edit the document and open the task



3. For this exercise, click **Open this task**
4. SharePoint will open a box to allow you to add comments and complete the task:
  - a. **Approve**
  - b. **Reject**
  - c. **Cancel**
  - d. **Request Change**
  - e. **Reassign Task**, only the user who is assigned the task can reassign it
5. For this exercise, the approver will complete the task by:
  - a. entering **Comments**
  - b. clicking **Approve, Reject** or **Cancel**



6. SharePoint will display the document and you can view, edit and close it
7. SharePoint will send notification to the submitter that the approval has completed. The user can click on the link and **View the workflow history**.

