

SharePoint 2013

Workflow

Agenda

- Workflow Overview
- Set up Workflow
- Add a Document Workflow
- Workflow Tracking
 - Workflow Status
 - Workflow Notifications
 - Task History
 - Workflow History
- Task Comments and Actions
- Workflow Exercises

Workflow Overview

- Set up workflow as a set of repeatable steps
- Assign workflow roles
 - Submitters
 - Reviewers
 - Approvers
- Select workflow template
 - Approval (approve / reject docs)
 - Collect Feedback (compile feedback)
 - Collect Signatures (gather signatures)
 - Disposition Approval (retain / delete expired docs)
 - Publishing Approval (approve / reject pages)

Setup Workflow

Content Owner sets up workflow

1. Navigate to library
2. Library tab / Workflow Settings / Add a Workflow
3. Complete Settings
 - Select workflow type / Name
 - Enter name of Task List
 - Select Start Options
 - Select Approver(s) and CC(s)
 - Enter text message for notification
 - Select Due Date, if known

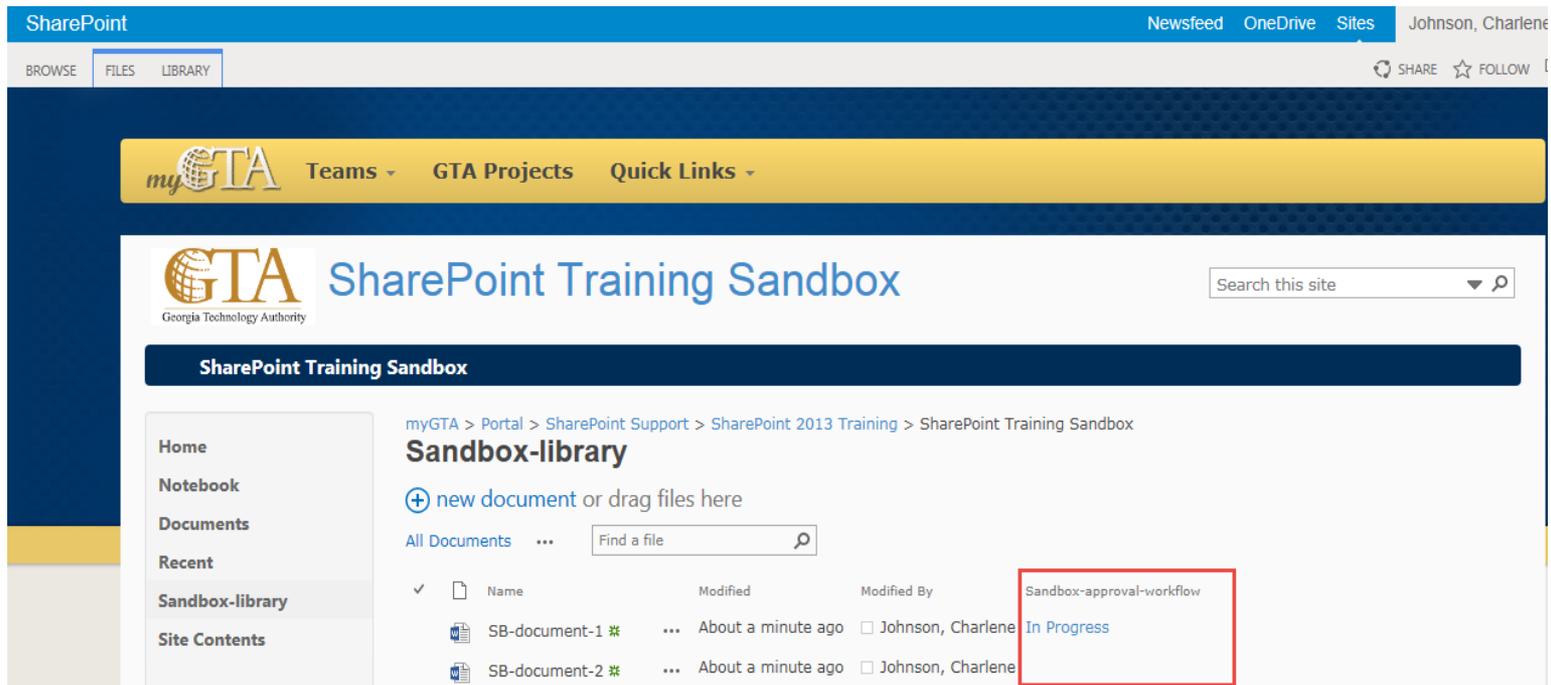
Add a Document Workflow

User adds a workflow

1. Select the document
2. Select a Workflows
3. Modify the setup, if needed

Workflow Status

SharePoint adds workflow status column to the library



The screenshot shows a SharePoint interface for a document library named "Sandbox-library". The breadcrumb path is "myGTA > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox". The library contains two documents: "SB-document-1" and "SB-document-2", both modified "About a minute ago" by "Johnson, Charlene". A new column, "Sandbox-approval-workflow", has been added to the library, and the status for "SB-document-1" is "In Progress".

✓	📄	Name	Modified	Modified By	Sandbox-approval-workflow
	📄	SB-document-1 #	... About a minute ago	<input type="checkbox"/> Johnson, Charlene	In Progress
	📄	SB-document-2 #	... About a minute ago	<input type="checkbox"/> Johnson, Charlene	

Workflow Notifications

SharePoint sends notifications

- Submitter, approver, reviewer

Approval started on SB-document-1.

SharePoint Training Sandbox <sharepoint@gtga.gov>

Sent: Tue 7/22/2014 10:57 AM

To: Johnson, Charlene

Approval has started on [SB-document-1](#).

Participants are sp4
Due by 8/31/2014 12:00:00 AM

Each person will receive a task to approve [SB-document-1](#). The tasks will be assigned one at a time for participants shown above.

[View the status of this workflow.](#)

Task History

SharePoint maintains history

- Task History
- Workflow History

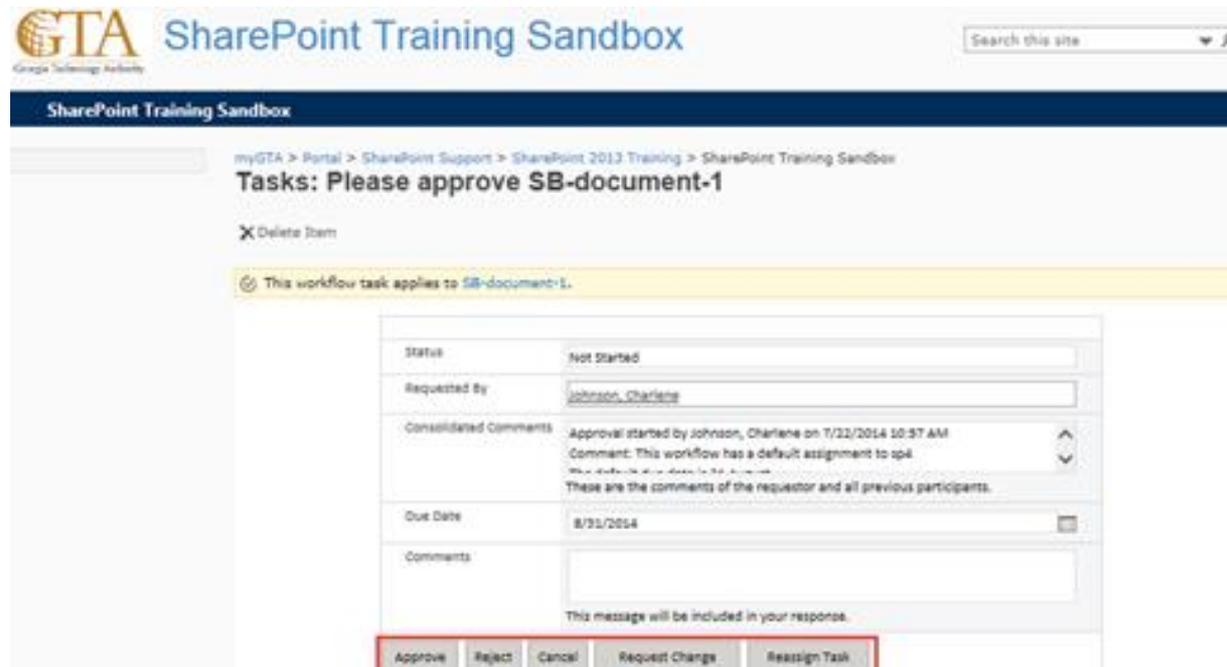
Tasks						
This workflow created the following tasks. You can also view them in Tasks .						
<input type="checkbox"/>	Assigned To	Title	Due Date	Status	Related Content	Outcome
<input type="checkbox"/>	sp4	Please approve SB-document-1 	8/31/2014	Not Started	SB-document-1	

Workflow History					
The workflow recorded these events.					
<input type="checkbox"/>	Date Occurred	Event Type	User ID	Description	Outcome
<input type="checkbox"/>	7/22/2014 10:57 AM	Workflow Initiated	<input type="checkbox"/> Johnson, Charlene	Approval was started. Participants: sp4	
<input type="checkbox"/>	7/22/2014 10:57 AM	Task Created	<input type="checkbox"/> Johnson, Charlene	Task created for sp4. Due by: 8/31/2014 12:00:00 AM	

Task Comments and Actions

Tasks can be actioned

- Add Comments
- Approve, Reject, Cancel, Change, Reassign buttons



The screenshot shows a SharePoint workflow task interface. At the top, there is a header for "GTA SharePoint Training Sandbox" with a search box. Below this is a navigation breadcrumb: "myGTA > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox". The main heading is "Tasks: Please approve SB-document-1". A "Delete Item" link is visible. A yellow banner states "This workflow task applies to SB-document-1.". The task details are shown in a table-like format:

Status	Not Started
Requested By	Johnson, Charlene
Consolidated Comments	Approval started by Johnson, Charlene on 7/22/2014 10:57 AM Comment: This workflow has a default assignment to sp4 These are the comments of the requestor and all previous participants.
Due Date	8/21/2014
Comments	<input type="text"/>

At the bottom, there is a row of action buttons: "Approve", "Reject", "Cancel", "Request Change", and "Reassign Task".

View Workflow History

Submitter views status of the workflow

- Participants, tasks, workflow history
- Outcomes

Tasks

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

<input type="checkbox"/>	Assigned To	Title	Due Date	Status	Related Content	Outcome
<input type="checkbox"/>	Johnson, Charlene	Please review SurveyQuestions NEW	7/31/2014	Completed	SurveyQuestions	Completed

Workflow History

The workflow recorded these events.

<input type="checkbox"/>	Date Occurred	Event Type	User ID	Description	Outcome
<input type="checkbox"/>	7/9/2014 10:10 AM	Workflow Initiated	Johnson, Charlene	Collect Feedback was started. Participants: Johnson, Charlene	
<input type="checkbox"/>	7/9/2014 10:10 AM	Task Created	Johnson, Charlene	Task created for Johnson, Charlene. Due by: 7/31/2014 12:00:00 AM	
<input type="checkbox"/>	7/9/2014 10:28 AM	Task Completed	Johnson, Charlene	Task assigned to Johnson, Charlene was completed by Johnson, Charlene. Comments: This task is now complete. Please accept these comments as the feedback that is needed in order to move forward. Thanks.	Reviewed by Johnson, Charlene
<input type="checkbox"/>	7/9/2014 10:28 AM	Workflow Completed	Johnson, Charlene	Collect Feedback was completed.	Collect Feedback on SurveyQuestions has successfully completed. All participants have completed their tasks.

Wrap Up



- Exercises
- Questions ???