

# Add Approval Workflow

## Add Approval workflow to a list or library

The workflows included with SharePoint products are features that you can use to automate your business processes, making them both more consistent and more efficient. You can use a SharePoint Approval workflow to route documents and other items stored in SharePoint products to one or more people for their approval. And with a SharePoint workflow handling your process for you, you've got more time for all the other things you need to get done.

### IMPORTANT

By default, the Approval workflow is not activated and is not listed in the Select a workflow template list box of the association form. To make it available for use, a site administrator must activate them at the site collection level.

Two matters need to be in order before you can add a workflow:

#### 1. Email

In order for the workflow to send email notifications and reminders, email must be enabled for your SharePoint site. If you're not sure that this has already been done, check with your SharePoint administrator.

#### 2. Permissions

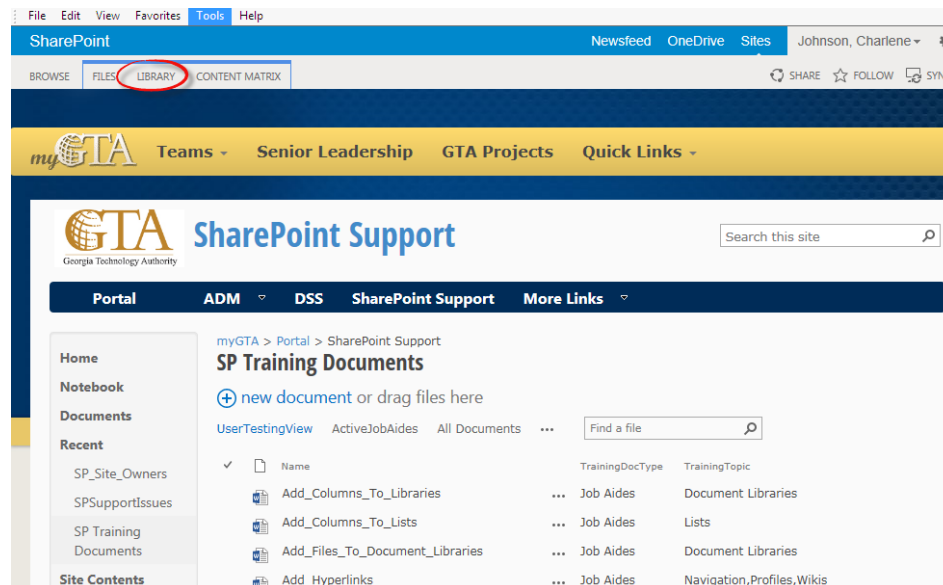
The SharePoint default settings require that you have the Manage Lists permission to add workflows for lists, libraries, or site collections. (The Owners group has the Manage Lists permission by default; the Members group and the Visitors groups do not.

## Add the workflow

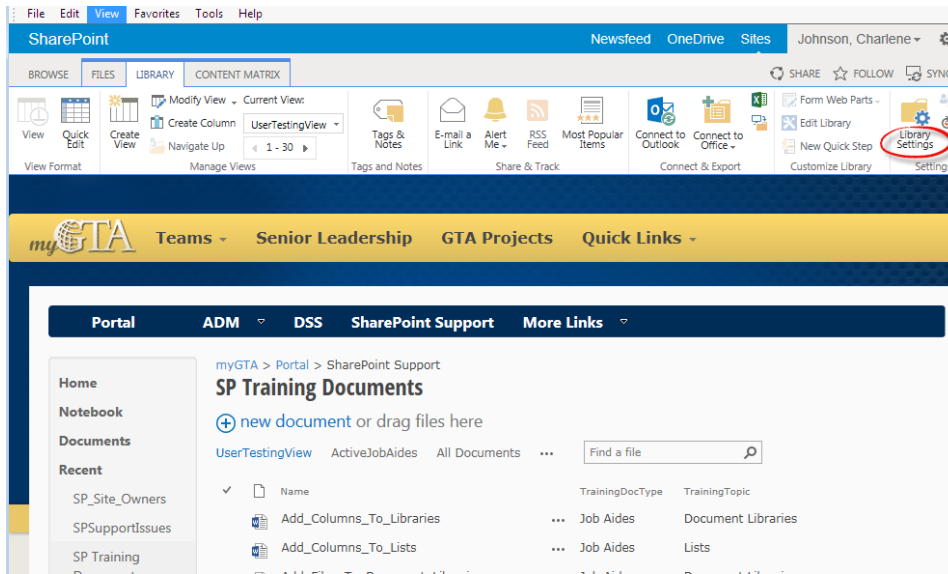
Follow these steps:

1. Navigate to the list or library for which you want to add the workflow, e.g. SP Training Documents.

On the ribbon, click the **List** or **Library** tab.



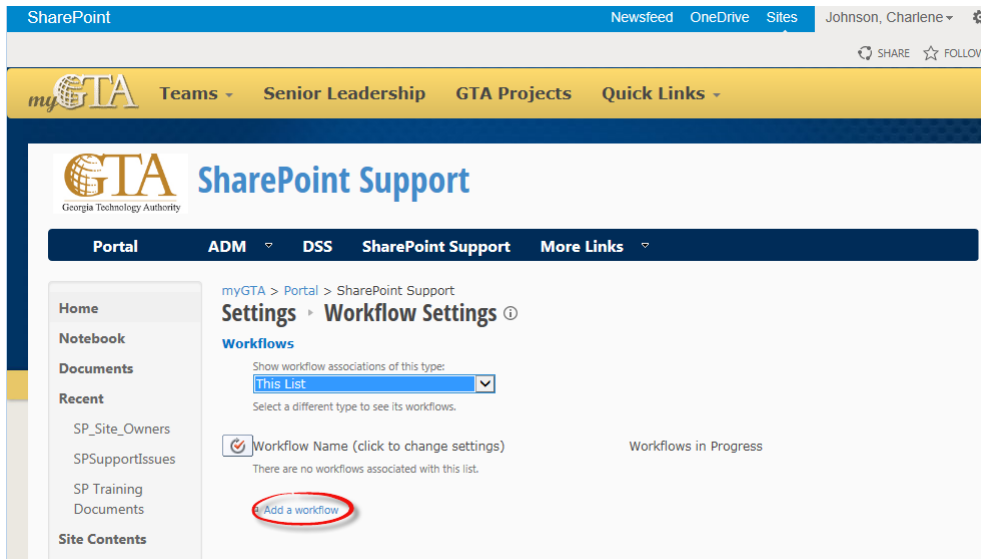
## 2. Click **Library Settings**.



## 3. In **Permissions and Management**, click **Workflow Settings**



4. Click **Add a workflow**.



5. Complete the first page of the association form.

**Template**

Select the **Approval – SharePoint 2010** template.

Note If the **Approval – SharePoint 2010** template doesn't appear in the list, contact your SharePoint administrator to find out about having it activated for your site collection or workspace.

**Name**

Type a name for this workflow. The name will identify this workflow to users of this list or library. For suggestions about naming your workflow.

**Task List**

Select a task list to use with this workflow. You can select an existing task list or click **New task list** to have a new list created.

**History List**

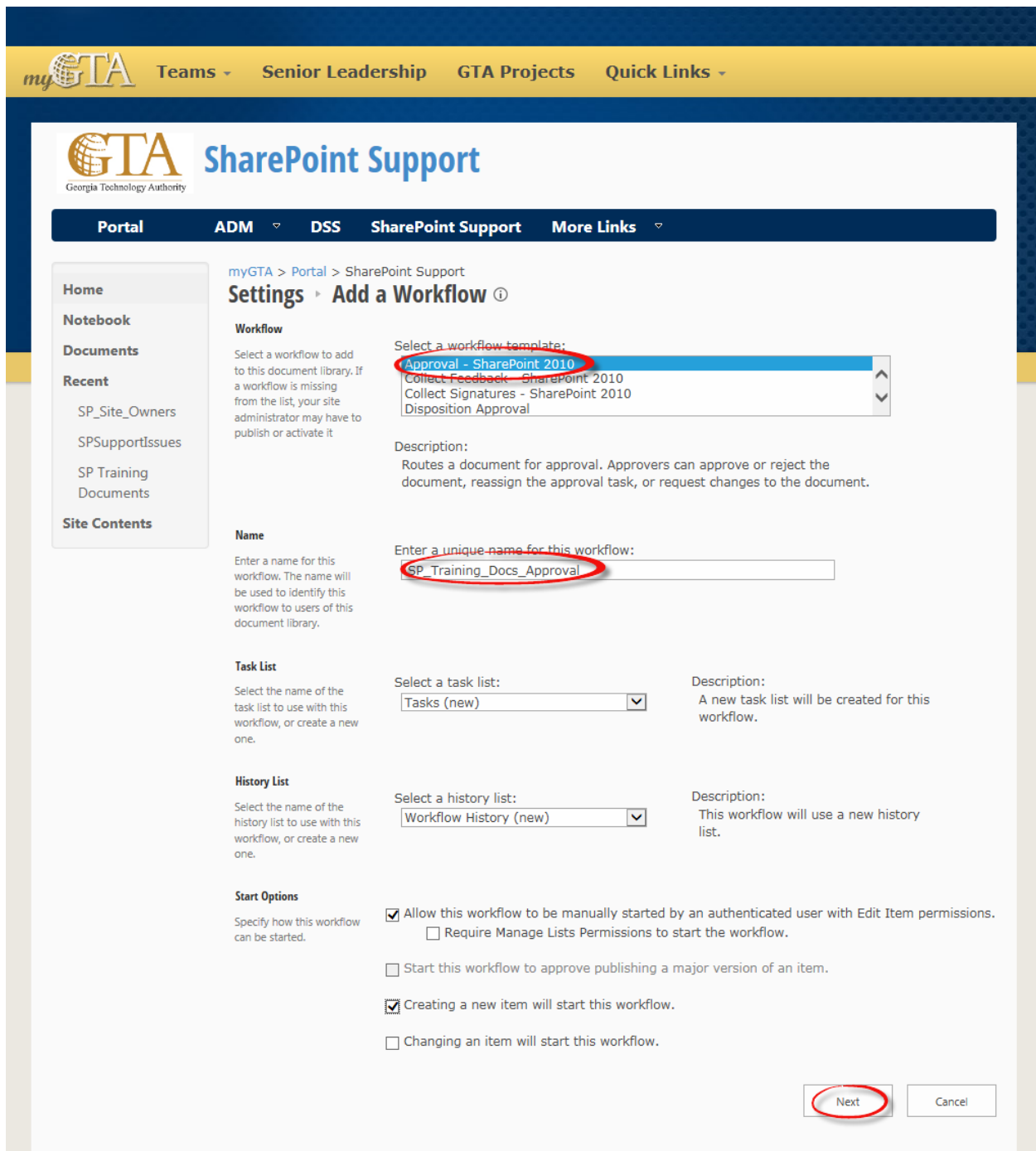
Select a history list to use with this workflow. You can select an existing history list or click **Workflow History (new)** to have a new list created.

**Start Options**

Specify the way or ways in which this workflow can be started.

For example, sample data has been entered below for the SP\_Training\_Docs\_Approval.

6. When all of the settings in this form are the way you want them, click **Next**.



**myGTA** > Portal > SharePoint Support

**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:

SP\_Training\_Docs\_Approval

**Task List**

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

Select a task list:

Tasks (new)

Description: A new task list will be created for this 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 (new)

Description: This workflow will use a new history list.

**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**

7. Complete the second page of the association form.

### Assign to

Enter names or addresses for the people you want the workflow to assign tasks to.

- **If the tasks will be assigned one at a time (in serial)**  
Enter the names or addresses in the order in which the tasks should be assigned.
- **If all of the tasks will be assigned at the same time (in parallel)**  
The order of the names or addresses doesn't matter.
- **If you're assigning a task to someone outside of your SharePoint organization**

### Order

Specify whether the tasks should be assigned one at a time (in serial) or all at once (in parallel).

### Add a new stage

Add any stages that you want beyond the first one that you've just configured.

- To *delete* an entire stage, click in the **Assign To** field for that stage, and then press CTRL+DELETE.

### Expand groups

- To have *one task assigned to each* member of each group that you enter in the **Assign to** field, *select* this check box. (Each member of the group will receive a task notification, and each member will have his or her own task to complete.)
- To have *only one task assigned to each* entire group that you enter in the **Assign to** field, *clear* this check box. (Each member of the group will receive a task notification, but any one member can claim and complete the single task on behalf of the whole group.)

### Request

Any text that you include here will be included in each task notification that the workflow sends. Don't forget to include any additional instructions or resources that participants might need, including:

- Contact information.
- If appropriate, a note about single tasks assigned to entire groups or distribution lists.

### Due dates and task durations

Specify a final due date for the entire workflow, and/or specify the number of days, weeks, or months allowed for the completion of each task from the time when it's assigned.

- If this workflow will ever start automatically, it's usually a good idea to leave the **Due Date for All Tasks** field empty and to use the two duration fields to control the due date. You can always supply a precise due date in the initiation form if and when you start the workflow manually.

### CC

Enter the names or email addresses of anyone who should be notified each time the workflow starts or ends.

- Entering a name here *doesn't* result in the assignment of a workflow task.
- When the workflow is started manually, *the person who starts it* receives the start and stop notifications without needing to be specified in this field.
- When the workflow is started automatically, *the person who originally added it* receives the start and stop notifications without needing to be specified in this field.

### Ending the workflow

Select neither, either, or both of these options.

### Enable content approval

Select this check box if you will be using this workflow to manage content approval.

8. When you have all of the settings in this page the way you want them, click **Save** to create the workflow.

For example, sample data has been entered below.

The screenshot shows the 'Change a Workflow' settings page for 'SP\_Training\_Docs\_Approval'. The page is part of the myGTA Portal under SharePoint Support. The settings are as follows:

Approvers	Assign To	Order
	Johnson, Charlene	One at a time (serial)

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.

**Expand Groups**  
 For each group entered, assign a task to every individual member and to each group that it contains.

**Request**  
Your task is to approve the training document. You will be asked to perform this task each time a training document is created in the training document library.  
This message will be sent to the people assigned tasks.

**Due Date for All Tasks**  
The date by which all tasks are due.

**Duration Per Task**  
3  
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**  
Notify these people when the workflow starts and ends without assigning tasks to them.

**End on First Rejection**  
 Automatically reject the document if it is rejected by any participant.

**End on Document Change**  
 Automatically reject the document if it is changed before the workflow is completed.

**Enable Content Approval**  
 Update the approval status after the workflow is completed (use this workflow to control content approval).

**Buttons:** Save, Cancel

9. SharePoint products creates your new workflow version, e.g. SP\_Training\_Docs\_Approval.

The screenshot shows the 'Workflow Settings' page for 'SP\_Training\_Docs\_Approval'. The page is part of the myGTA Portal under SharePoint Support. The settings are as follows:

**Workflow Name (click to change settings)**  
SP\_Training\_Docs\_Approval

Workflows in Progress: 0

**Buttons:** Add a workflow, Remove, Block, or Restore a Workflow

10. This is the sample results for the approval workflow:

- Email Notification

From: SharePoint Support <sharepoint@ga.gov> Sent: Tue 6/3/2014 9:04 AM  
To: Johnson, Charlene  
Cc:  
Subject: Tasks - Please approve Display\_Libraries\_In\_Quick\_Launch

Task assigned by Johnson, Charlene on 6/3/2014.

Due by None

Approval started by Johnson, Charlene on 6/3/2014 9:03 AM  
Comment: Your task is to approve the training document. You will be asked to perform this task each time a training document is created in the training document library.

---

To complete this task:

1. Review [Display Libraries In Quick Launch](#).
2. Perform the specific activities required for this task.
3. Use the **Open this task** button to mark the task as completed. (If you cannot update this task, you might not have access to it.)