

Add Feedback Workflow

Add Feedback Collection 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 Collect Feedback workflow to route documents and other items stored in SharePoint products to one or more people for their feedback. 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 Collect Feedback 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:

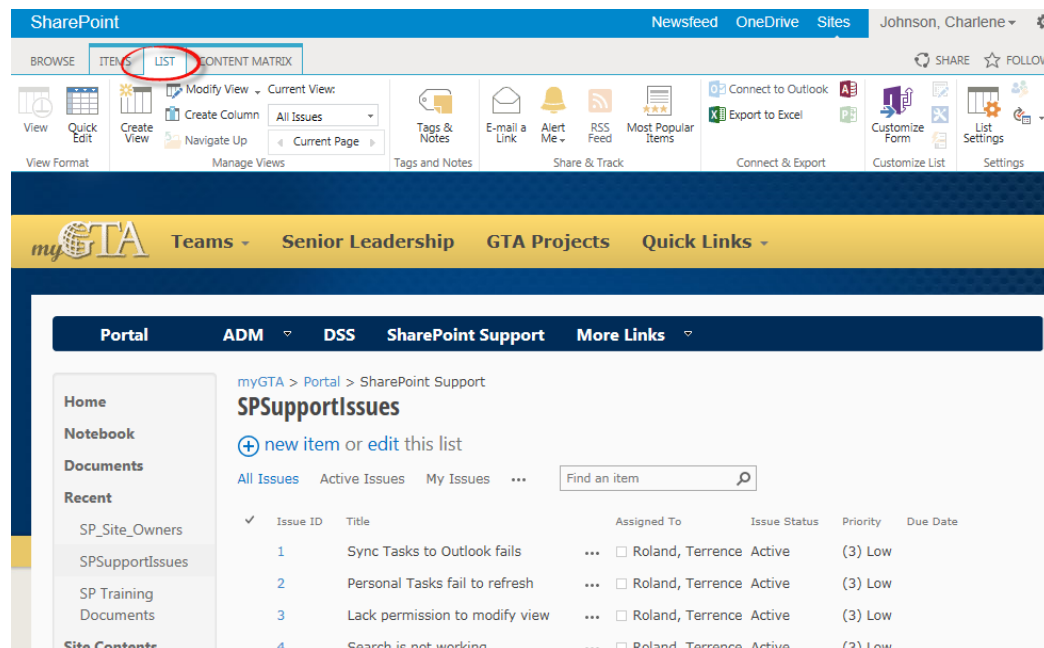
1. **Email** In order for the workflow to send email notifications and reminders, email must be enabled for your SharePoint site. If you're not sure that this has already been done, check with your SharePoint administrator.
2. **Permissions** The default settings require that you have the Manage Lists 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 group do not)

Add the workflow

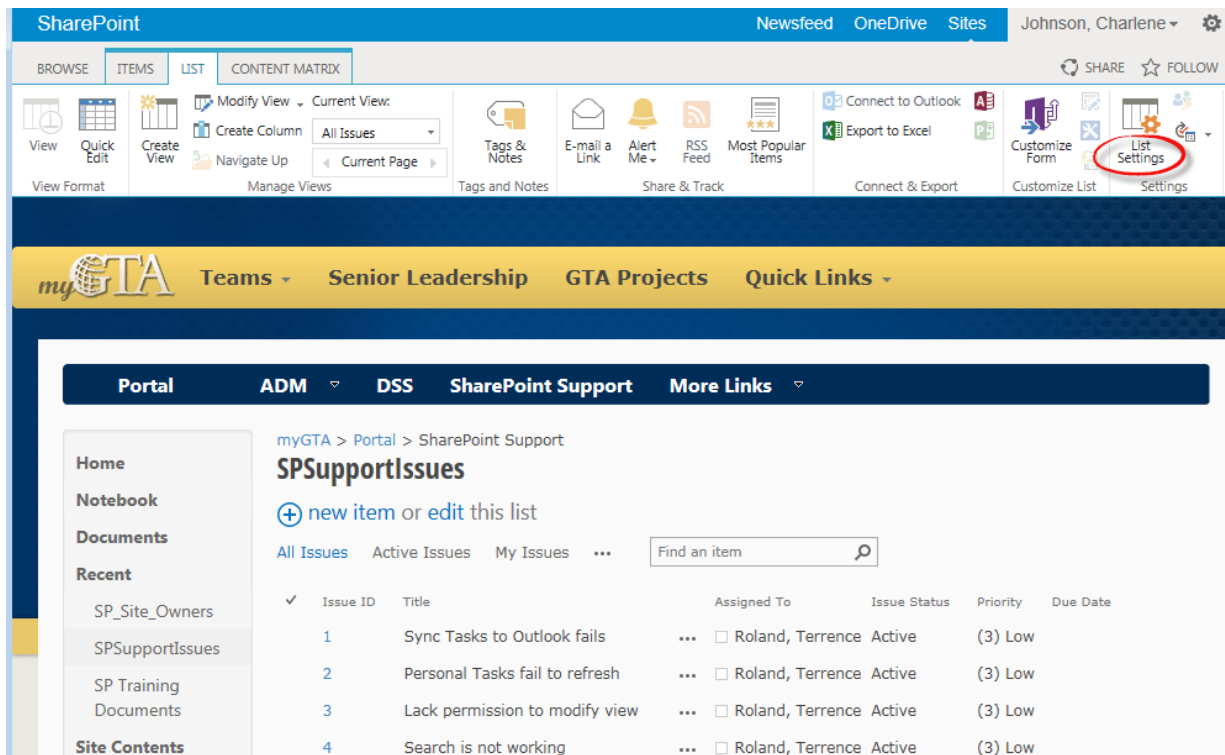
Follow these steps:

1. Open the list or library for which you want to add the workflow, e.g. SPSupportIssues.
2. On the ribbon, click the **List** or **Library** tab.

Note The name of the tab can vary with the type of list or library. For example, in a calendar list this tab is named **Calendar**.



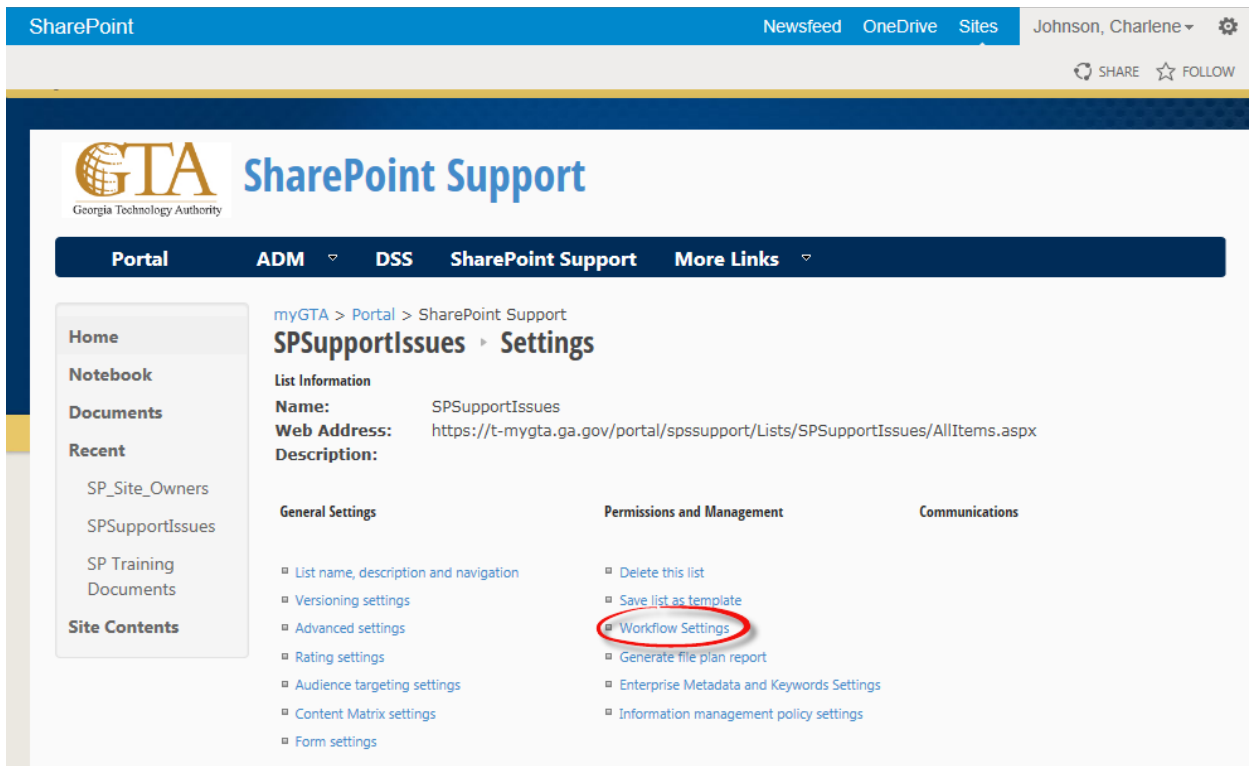
3. Click the **Settings** group, e.g. List Settings



The screenshot shows the SharePoint interface for a site named 'myGTA'. The top navigation bar includes 'Newsfeed', 'OneDrive', and 'Sites'. The user is identified as 'Johnson, Charlene'. The ribbon is set to 'LIST' and shows various options like 'View', 'Quick Edit', 'Create View', 'Modify View', 'Create Column', 'Tags & Notes', 'E-mail a Link', 'Alert Me', 'RSS Feed', 'Most Popular Items', 'Connect to Outlook', 'Export to Excel', 'Customize Form', and 'List Settings'. The 'List Settings' option is circled in red. Below the ribbon, there is a navigation bar with 'Portal', 'ADM', 'DSS', 'SharePoint Support', and 'More Links'. The main content area shows the 'SPSupportIssues' list with a table of items.

Issue ID	Title	Assigned To	Issue Status	Priority	Due Date
1	Sync Tasks to Outlook fails	Roland, Terrence	Active	(3) Low	
2	Personal Tasks fail to refresh	Roland, Terrence	Active	(3) Low	
3	Lack permission to modify view	Roland, Terrence	Active	(3) Low	
4	Search is not working	Roland, Terrence	Active	(3) Low	

4. Click **Workflow Settings**.



The screenshot shows the 'List Settings' page for the 'SPSupportIssues' list. The page is titled 'SPSupportIssues Settings' and includes sections for 'List Information', 'General Settings', 'Permissions and Management', and 'Communications'. The 'Workflow Settings' option is circled in red in the 'Permissions and Management' section.

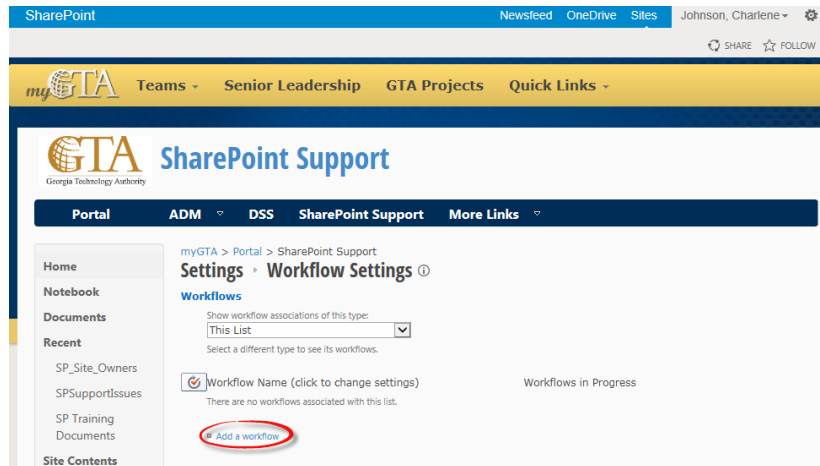
List Information

- Name: SPSupportIssues
- Web Address: <https://t-mygta.ga.gov/portal/spssupport/Lists/SPSupportIssues/AllItems.aspx>
- Description:

Permissions and Management

- Delete this list
- Save list as template
- Workflow Settings**
- Generate file plan report
- Enterprise Metadata and Keywords Settings
- Information management policy settings

5. Click **Add a workflow**.



6. Complete the first page of the association form.

Workflow

Select the **Collect Feedback – SharePoint 2010** template.

Note If the **Collect Feedback – 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.

Task List

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

History List

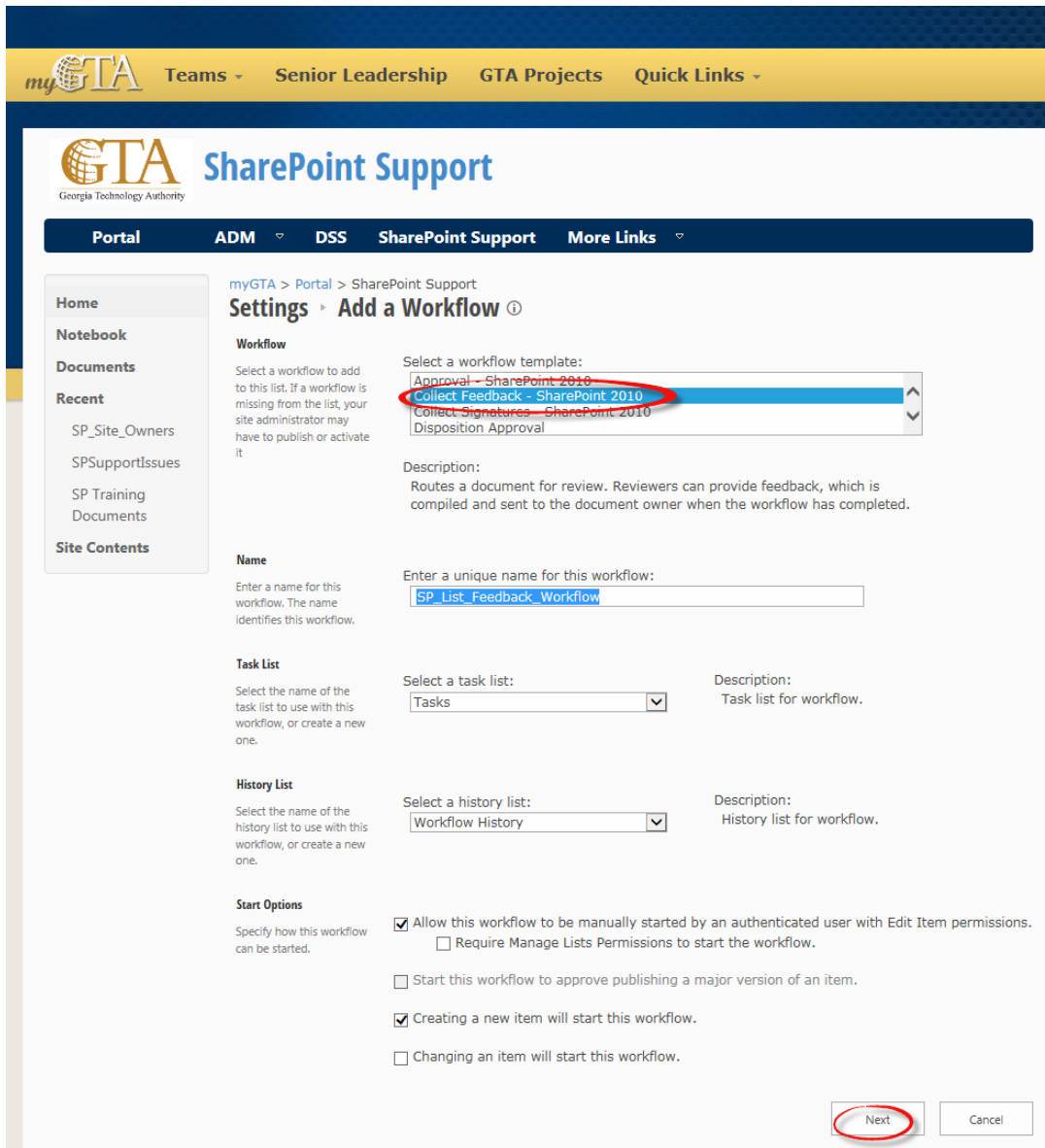
Select a history list to use with this workflow. You can select an existing history list or click **New history list** to have a new list created.

Start Options

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

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

For this example, SP_List_Feedback_Workflow is the name of the feedback workflow.



The screenshot shows the 'Add a Workflow' configuration page in SharePoint. The breadcrumb trail is 'myGTA > Portal > SharePoint Support'. The page title is 'Settings > Add a Workflow'. The 'Workflow' section includes a dropdown menu for selecting a template, with 'Collect Feedback - SharePoint 2010' selected. Below this is a description: 'Routes a document for review. Reviewers can provide feedback, which is compiled and sent to the document owner when the workflow has completed.' The 'Name' section has a text box containing 'SP_List_Feedback_Workflow'. The 'Task List' section has a dropdown menu set to 'Tasks' and a description 'Task list for workflow.'. The 'History List' section has a dropdown menu set to 'Workflow History' and a description 'History list for workflow.'. The 'Start Options' section has several checkboxes: 'Allow this workflow to be manually started by an authenticated user with Edit Item permissions.' (checked), 'Require Manage Lists Permissions to start the workflow.' (unchecked), 'Start this workflow to approve publishing a major version of an item.' (unchecked), 'Creating a new item will start this workflow.' (checked), and 'Changing an item will start this workflow.' (unchecked). At the bottom right, the 'Next' button is circled in red, and the 'Cancel' button is also visible.

6. Complete the second page of the association form.

Note SharePoint products presents you with the first several options in this second page of the association form — numbers one through seven in the following illustration, from **Assign to** through **CC** — each time that you start the workflow manually, so that you can make changes to those options for just that one instance.

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 you want the tasks to 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 person for questions and problems
 - Whether feedback can be submitted only in the task form, or also in the item itself. (And if in the item, whether reviewers can check out the document or must leave it checked in.)
- If applicable, a note about claiming 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 only 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

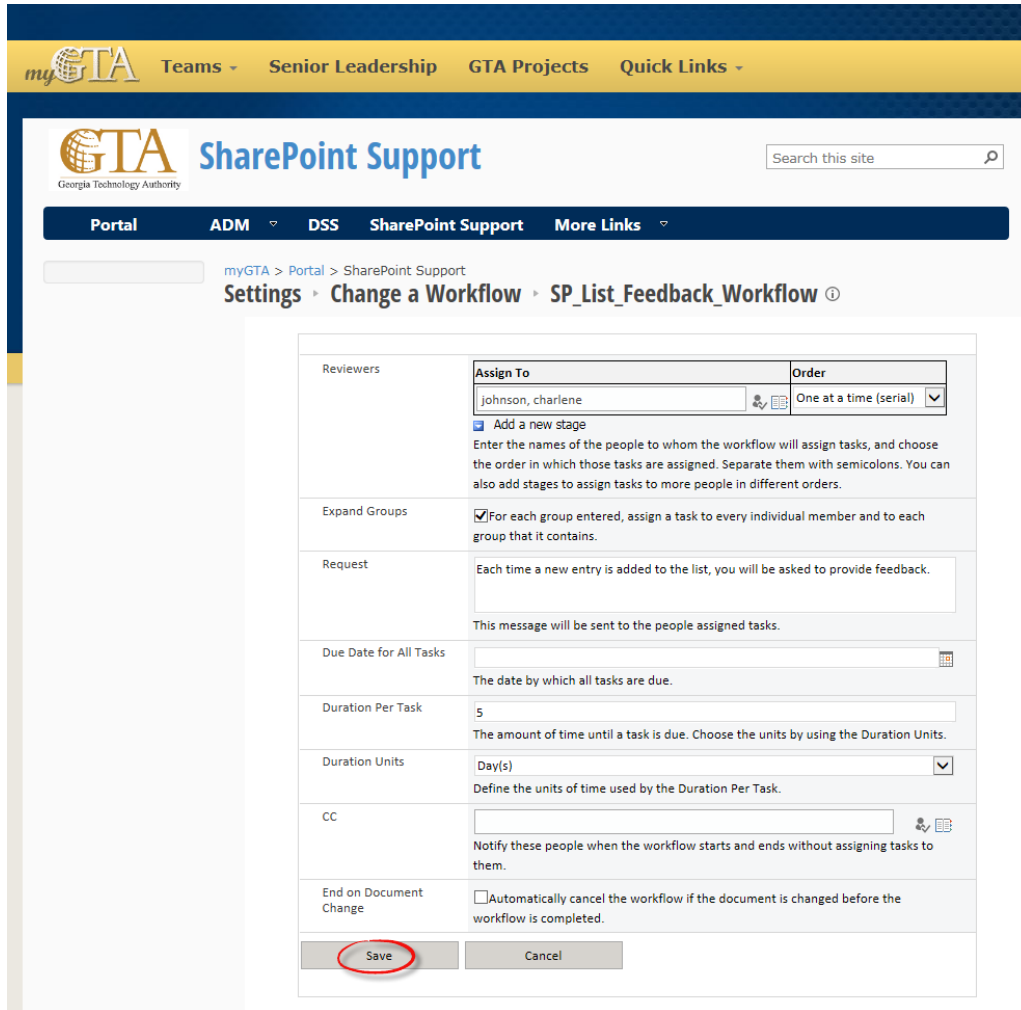
start and stop notifications without needing to be specified in this field.

Ending the workflow

To have the workflow stopped and canceled as soon as any change is made to the item being reviewed, select this option.

Remember that if you select this option, reviewers cannot add tracked changes and comments in the item without ending the workflow.

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

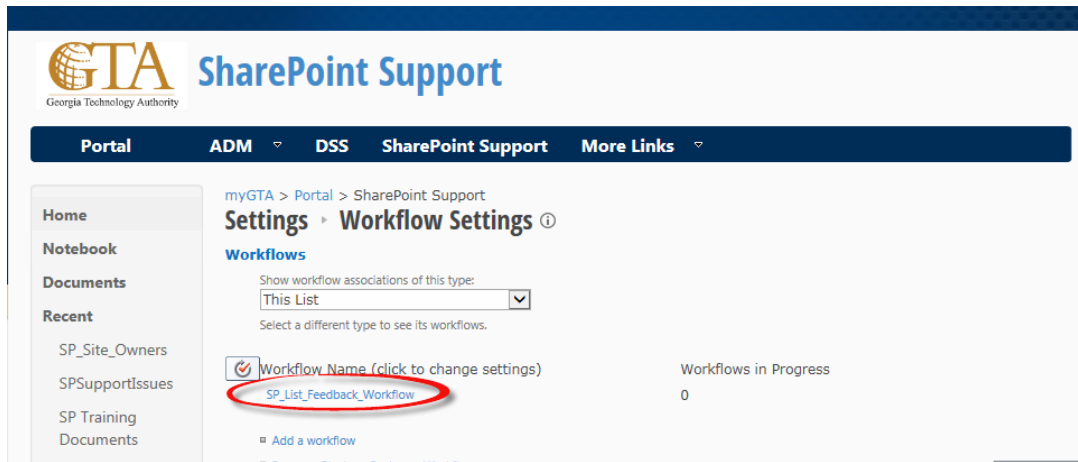


The screenshot shows the 'Change a Workflow' settings page for 'SP_List_Feedback_Workflow'. The page includes a navigation bar with 'Portal', 'ADM', 'DSS', 'SharePoint Support', and 'More Links'. The breadcrumb trail is 'myGTA > Portal > SharePoint Support > Settings > Change a Workflow > SP_List_Feedback_Workflow'. The settings form contains the following fields:

- Reviewers:** A table with columns 'Assign To' and 'Order'. The 'Assign To' field contains 'johnson, charlene'. The 'Order' dropdown is set to 'One at a time (serial)'. Below the table is a checkbox 'Add a new stage' and a text box for entering names and order.
- Expand Groups:** A checkbox 'For each group entered, assign a task to every individual member and to each group that it contains.' which is checked.
- Request:** A text box containing 'Each time a new entry is added to the list, you will be asked to provide feedback.' Below it is a text box for 'This message will be sent to the people assigned tasks.'
- Due Date for All Tasks:** A date picker field with the label 'The date by which all tasks are due.'
- Duration Per Task:** A text box containing '5' with the label 'The amount of time until a task is due. Choose the units by using the Duration Units.'
- Duration Units:** A dropdown menu set to 'Day(s)' with the label 'Define the units of time used by the Duration Per Task.'
- CC:** A text box for email addresses with the label 'Notify these people when the workflow starts and ends without assigning tasks to them.'
- End on Document Change:** A checkbox 'Automatically cancel the workflow if the document is changed before the workflow is completed.' which is unchecked.

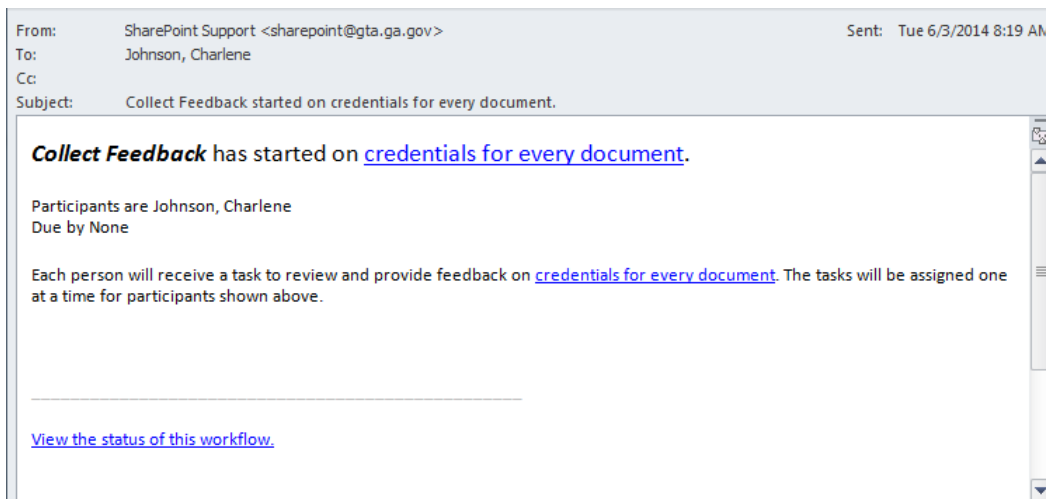
At the bottom of the form are two buttons: 'Save' (circled in red) and 'Cancel'.

9. SharePoint products creates your new workflow version, e.g. SP_List_Feedback_Workflow.



10. This is a sample of the feedback workflow notification that is received, where the new document is titled 'credentials for every document.'

- Email Notification



- Status of this workflow

SharePoint Newsfeed OneDrive Sites Johnson, Charlene

myGTA Teams Senior Leadership GTA Projects Quick Links

GTA SharePoint Support
Georgia Technology Authority

Portal ADM DSS SharePoint Support More Links

myGTA > Portal > SharePoint Support
Workflow Status: SP_List_Feedback_Workflow

Workflow Information

Initiator: Johnson, Charlene **Item:** credentials for every document
Started: 6/3/2014 8:18 AM **Status:** In Progress
Last run: 6/3/2014 8:19 AM

Workflow Visualization

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PAGE 1 OF 1 80%

- ▀ Add or update reviewers of Collect Feedback
- ▀ Cancel all Collect Feedback tasks
- ▀ Update active tasks of Collect Feedback

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"/> Johnson, Charlene	Please review credentials for every document new	6/8/2014	Not Started	credentials for every document	

Workflow History

The workflow recorded these events.

<input type="checkbox"/> Date Occurred	Event Type	<input type="checkbox"/> User ID	Description	Outcome
6/3/2014 8:19 AM	Workflow Initiated	<input type="checkbox"/> Johnson, Charlene	Collect Feedback was started. Participants: Johnson, Charlene	
6/3/2014 8:19 AM	Task Created	<input type="checkbox"/> Johnson, Charlene	Task created for Johnson, Charlene. Due by: 6/8/2014 8:19:00 AM	