Georgia Technology Authority

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:

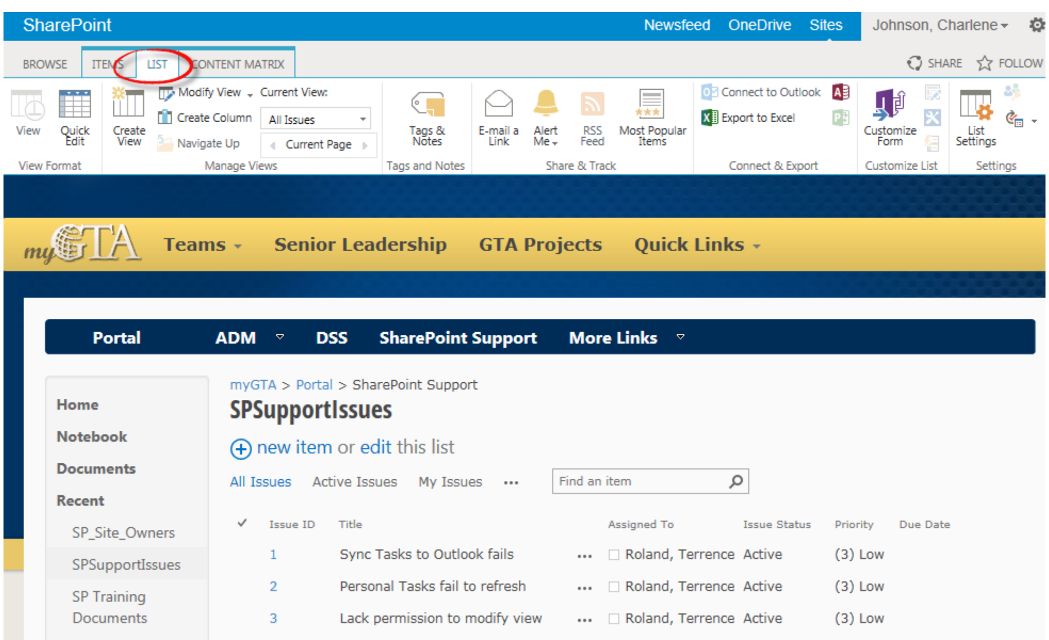
1. **Email** In order for the workflow to send email notifications and reminders, email must be enabled for your SharePoint site. If you're not sure that this has already been done, check with your SharePoint administrator.
2. **Permissions** The default settings require that you have the Manage Lists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

Add the workflow

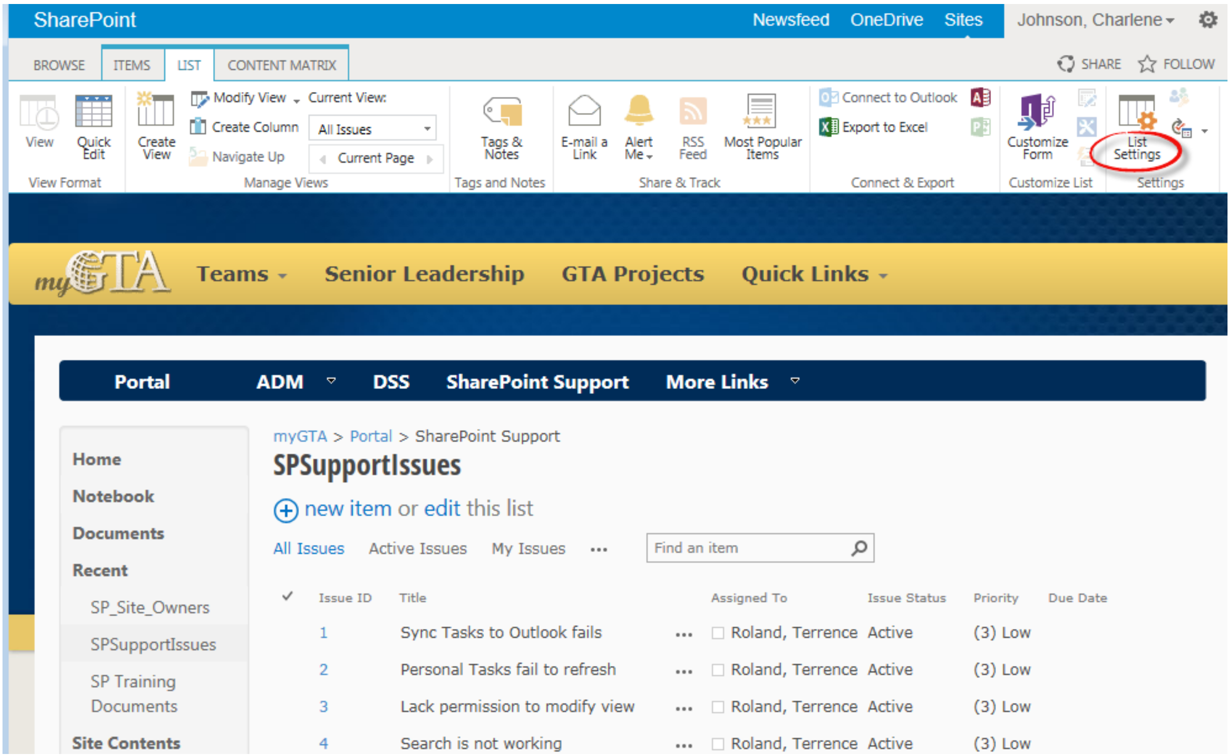
Follow these steps:

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.

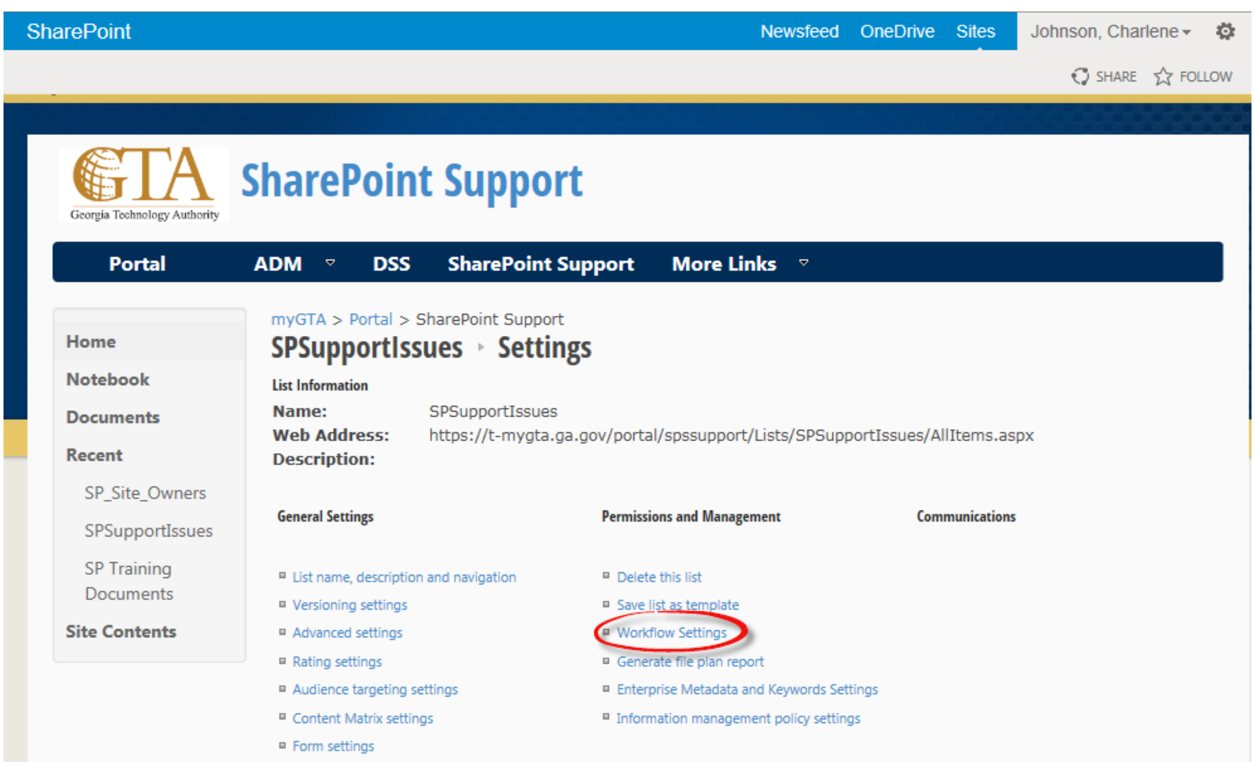
Note The name of the tab can vary with the type of list or library. For example, in a calendar list this tab is named **Calendar**.



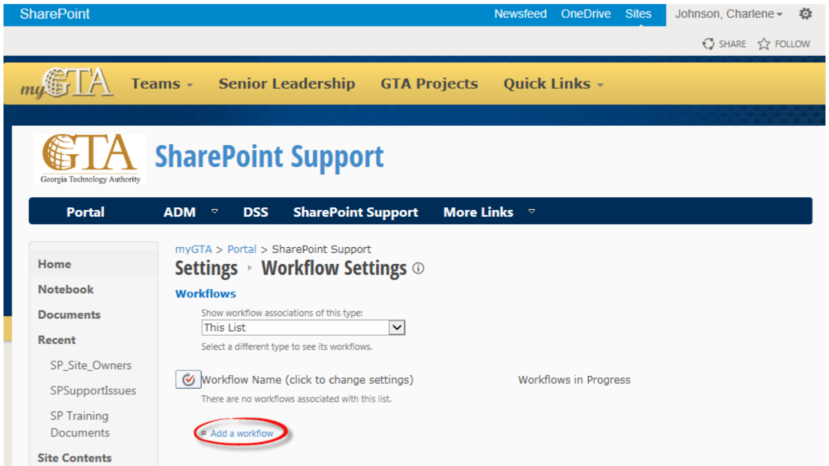
3. Click the **Settings** group, e.g. List Settings



4. Click **Workflow 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.

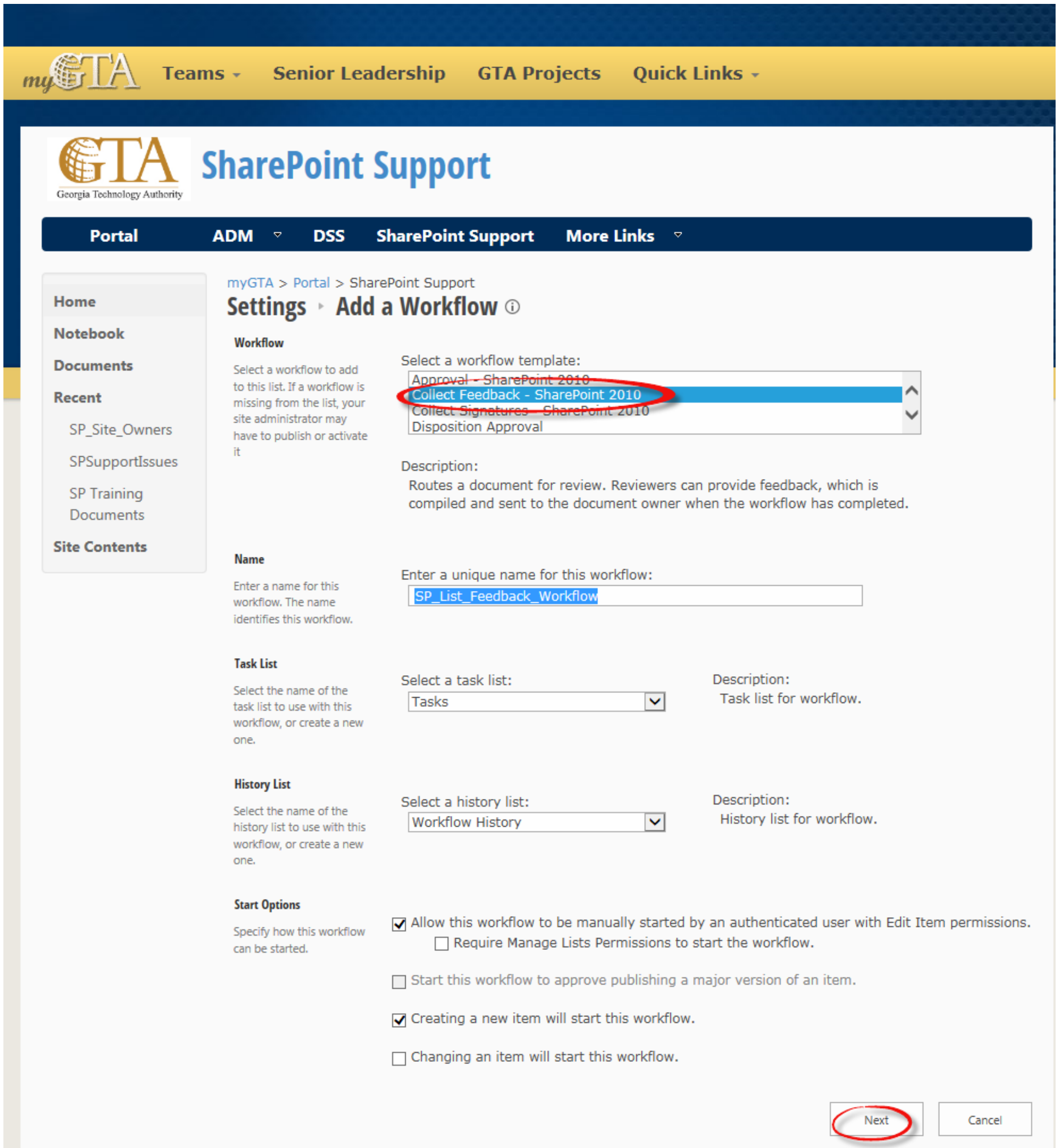
Task List
Select a task list to use with this workflow. You can select an existing task list or click **Tasks (new)** to have a new list created.

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.



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.

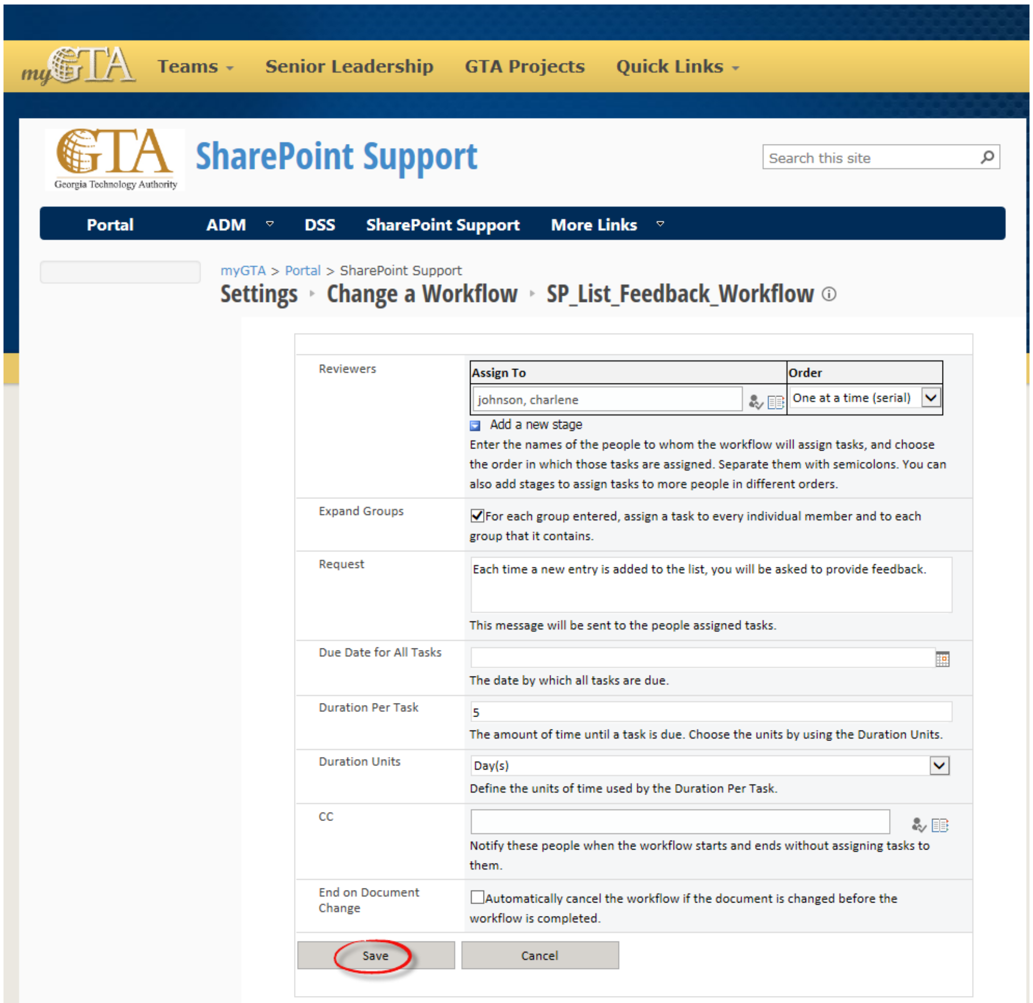
CC
Enter the names or email addresses of anyone who should be notified each time the workflow starts or ends.

- 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

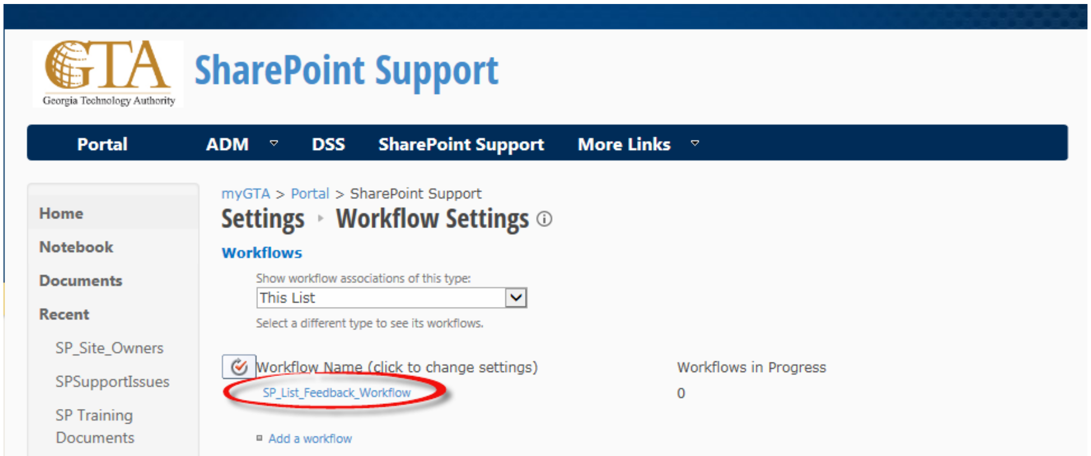
start and stop notifications without needing to be specified in this field.

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.

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



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

From: SharePoint Support <sharepoint@gta.ga.gov> Sent: Tue 6/3/2014 8:19 AM
To: Johnson, Charlene
Cc:
Subject: Collect Feedback started on credentials for every document.

Collect Feedback has started on credentials for every document.

Participants are Johnson, Charlene
Due by None

Each person will receive a task to review and provide feedback on credentials for every document. The tasks will be assigned one at a time for participants shown above.

View the status of this workflow.

- Status of this workflow