

# Building Workflows In SharePoint 2010

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# Agenda

- Browser Tools
- New Workflow Types
- SharePoint Designer Updates
  - Impersonation Step
  - Conditions
  - Actions
- Visio Integration

# Browser Based Tools

- Same Familiar Workflows
  - Approval
  - Collect Feedback
  - Disposition
  - Three State
  - Collect Signatures
- New Ability to have multiple steps
  - Serial -> Parallel -> Serial
- Browser based workflows can now be customized in SharePoint Designer 2010

# Browse Workflow Execution Options

- 2007



- 2010



# Demo

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## Browser Workflows

# Workflow Types

- List Workflow
  - Same as 2007 Workflows
  - Aware of custom list fields
  - Cannot be re-purposed
- Re-usable List Workflow
  - Available across a site collection
  - Can be exported/imported to other site collections
  - Only has access to fields common to all items but can be filtered to focus on a Content Type
  - You can also add association columns that “travel” with the workflow definition

# Workflow Types (cont.)

- Site Workflows
  - A workflow not associated with any list or library
  - Accessed from the View All Site Content page
  - Good to use when you don't need a list or library OR you don't know yet what list or library you want to put something in
  - Can only be started manually

# Impersonation Step

- This is a new kind of step that allows actions taken to be performed under the identity of the workflow creator
- Great for:
  - Elevating permissions during workflow execution to create/read/edit items the user typically does not have access to
  - Also can be used to look up user permissions & permission levels
- Can not be a nested step

# InfoPath Workflow Forms

- When not using SharePoint Foundation server SharePoint Designer generates all workflow forms through InfoPath
- You can edit and customize these InfoPath forms and leverage the unique features of InfoPath forms
- Workflow forms include
  - Association Forms
  - Initiation Forms
  - Task Forms

# Demo

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## Site Workflow

# New Task Tracking Actions

- Three new task actions act like sub processes you can execute in your workflow
  - Start Approval Process
  - Start Feedback Process
  - Start Custom Task Process
- These actions address the inability to create effective approval process in SPD workflows
- Think of them like sub workflows

# New Condition Capabilities

- Case insensitive comparison operators
  - Equals (ignoring case)
  - Contains (ignoring case)
- Ability to look up profile fields for comparison
  - i.e.  
created users department = "Sales" then...

# New Actions

- String utility actions
  - Get string from beginning
  - Get string from end
  - Get string from index and length
- Get interval between dates
- Retrieve a profile field value for a user
- Lookup manager of a user
- Document Set actions
  - Capture a version of the document set
  - Send document set to repository
  - Start document set approval process
  - Set content approval status for the document set

# Demo

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## Re-Usable Workflow

# Visualizing Workflows

- Visio Services (part of SharePoint Enterprise) can be used to create visualizations of your workflow execution
- To provide this you must:
  - Check this option on the workflow
  - The Workflow Creator/Publisher must have Visio 2010 Premium installed locally
  - Visio Graphics Services must be running on the SharePoint server
- You do not need Visio client to see the visualization

# Using Visio in Workflow Design

- Visio Professional 2010 includes a Microsoft SharePoint Workflow template that includes shapes for all of the workflow conditions and actions.
- You can start in Visio and then export to SPD or you can start in SPD and then export to Visio
- When you export/import to Visio it preserves the workflow configurations/properties

# Visio Workflow Design

- When in Visio you only have shapes to use for building the workflow
- You can't set properties, configurations & etc...
- So think of Visio as more of a high level workflow plotting/mapping tool
- SharePoint Designer is for the detailed configuration

# Demo

## Visio Workflow Integration

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# TCSC Services

- TCSC can provide assistance with mentoring & training on workflows
- We can build custom workflow actions for SPD
- Build InfoPath Forms
- Create custom .Net Workflow solutions