# SharePoint 2010 Workflow Overview

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# Agenda

Workflow spectrum?

Out of the Box Workflows

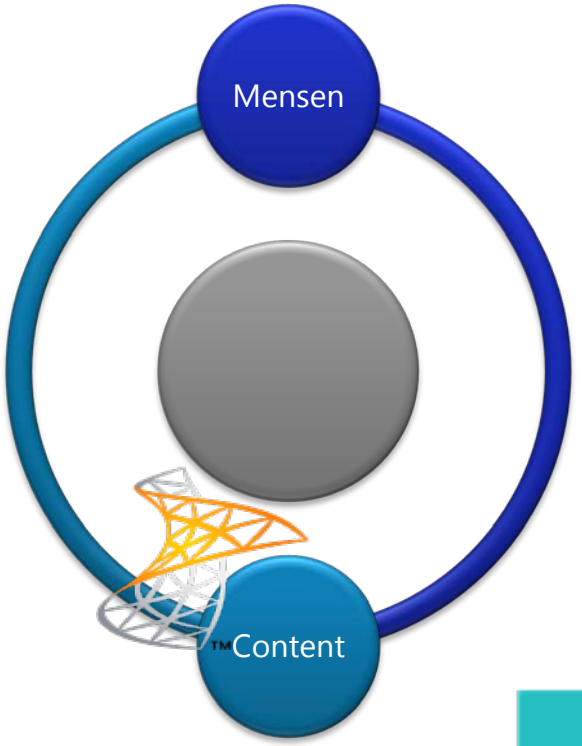
SharePoint Designer 2010 Workflow

Visual Studio 2010 Workflow

Third Party Workflow

# Introduction

- Why use SharePoint Workflow?
  - Support collaboration process
  - Interact with backend systems
  - Structure complex organisational processes
- Two types of workflows
  - Human or Sequential workfklow
  - Machine or State workflow
- SharePoint Worfklow is Task Driven…

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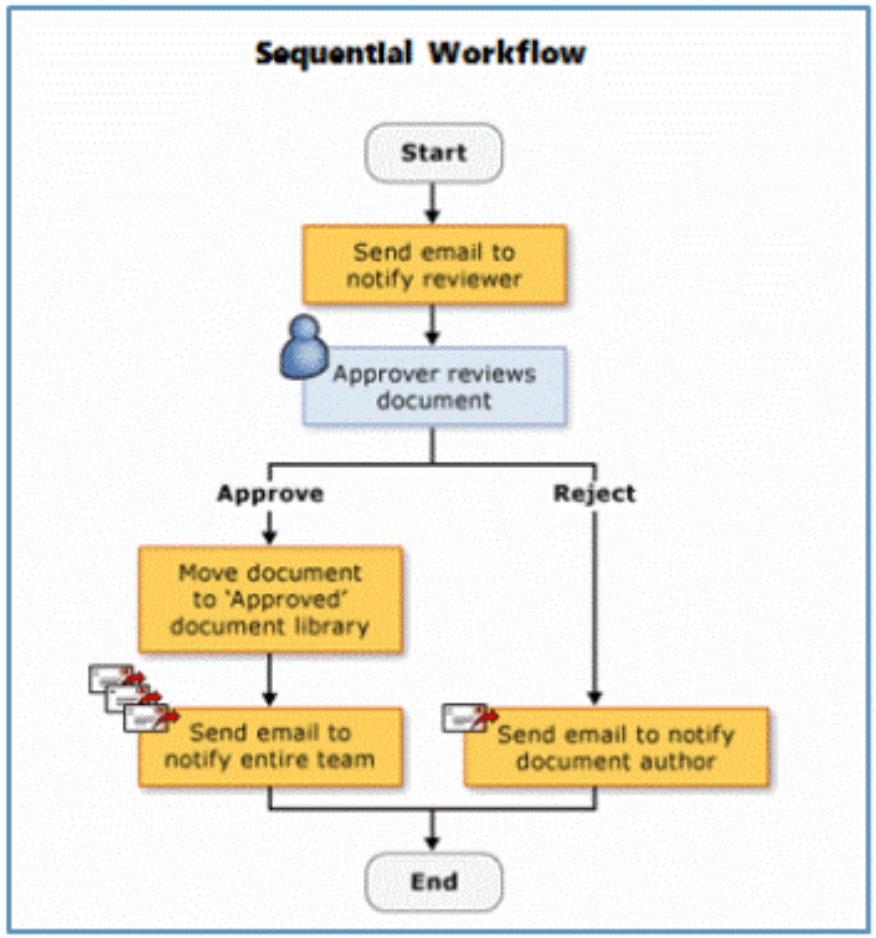
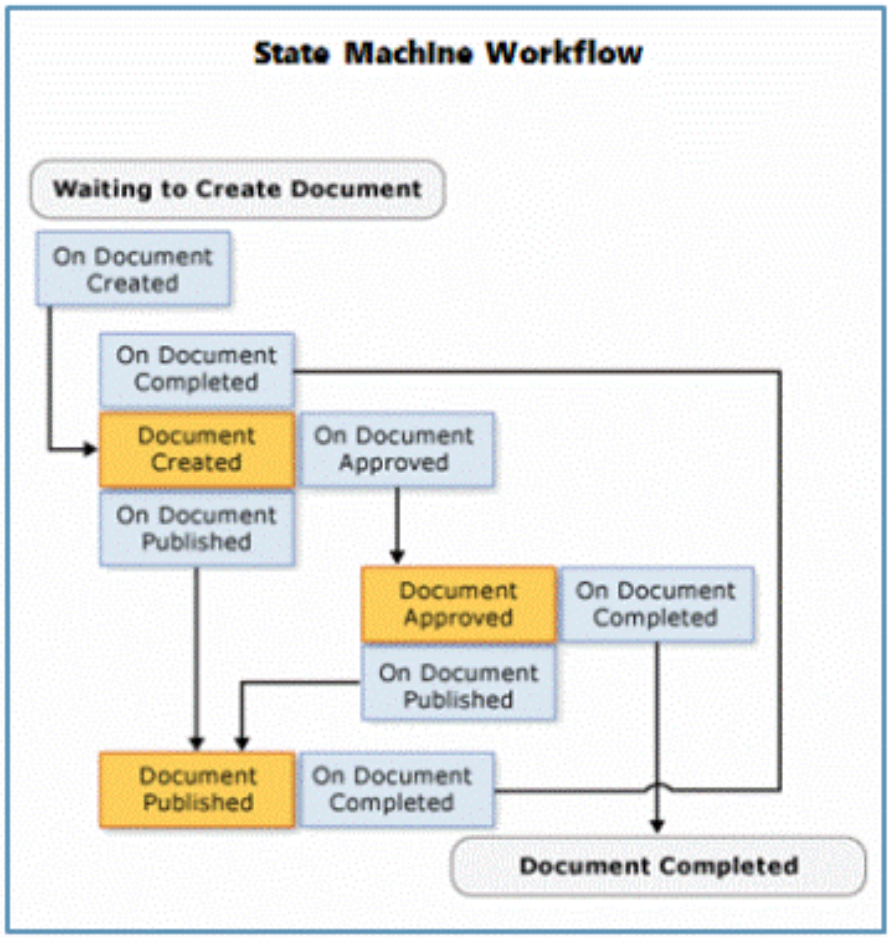
# Types of workflows

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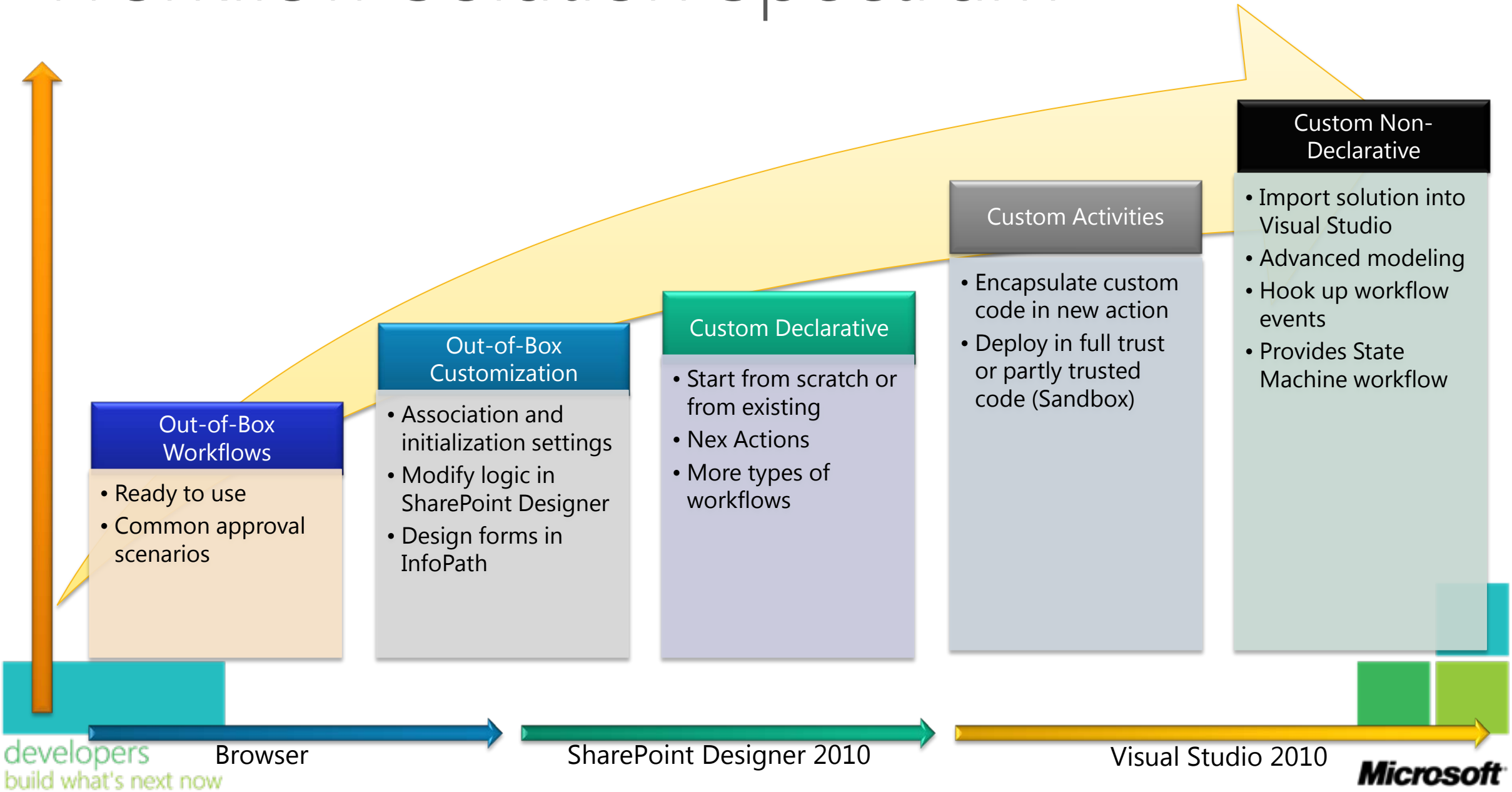
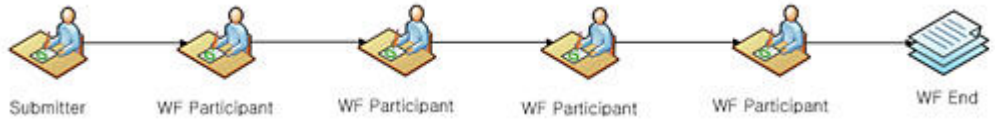
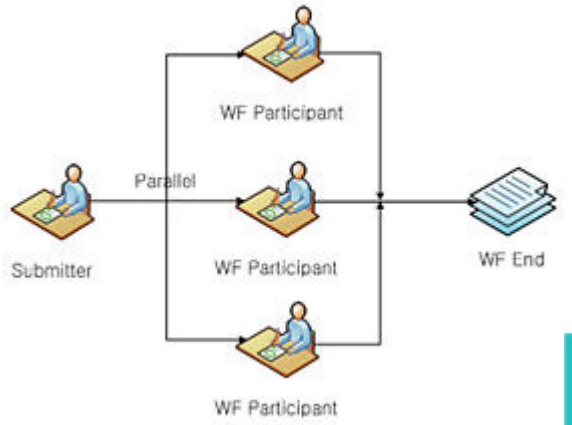
# Workflow Solution Spectrum



# Out of the box workflows

- Three State Workflow
  - Issue tracking, Active, Ready for Review, Complete
- Approval Worfklow
  - Sequential or parallel
- Collect Feedback Workflow
  - Collects feedback from participants
- Disposition Approval Worfklow
  - Tracks content that has expired

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# Voorbeeld - Declareren

- Iedere organisatie heeft eigen variant
- Meeste hebben een herkenbaar patroon
- Voorbeeld: gebruik van SharePoint forms library

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# From the Field

- Out of the box workflows don’t always fit
- Business is aware of tooling and possiblities to implement custom workflows (SAP, PeopleSoft, etc)

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Workflow

# SharePoint Designer 2010

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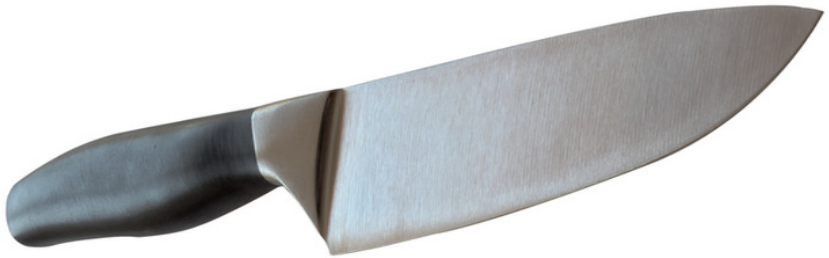
# What is SharePoint Designer?



## In Experienced Hands

## In Non-Experienced Hands

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# SharePoint Designer OOTB Actions

- Core Actions
  - Send Email, Set WF Status…
- Document Set Actions
  - Send to Repository, Start Approval…
- List Actions
  - Check In/Out Item, Declare Record…
- Relational Actions
  - Lookup Manager of User
- Utility Actions
  - Substring operations, Interval between dates
- Task Actions
  - Start Approval, Assign a To-Do…

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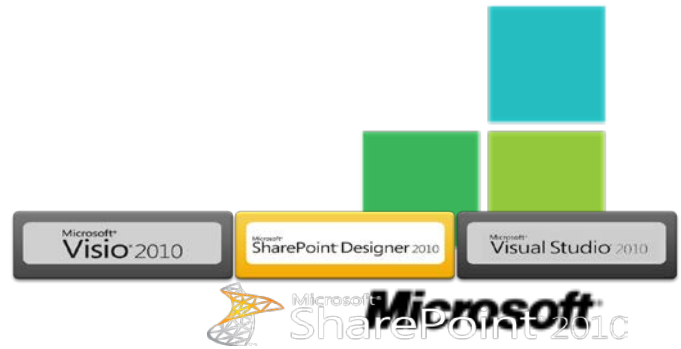
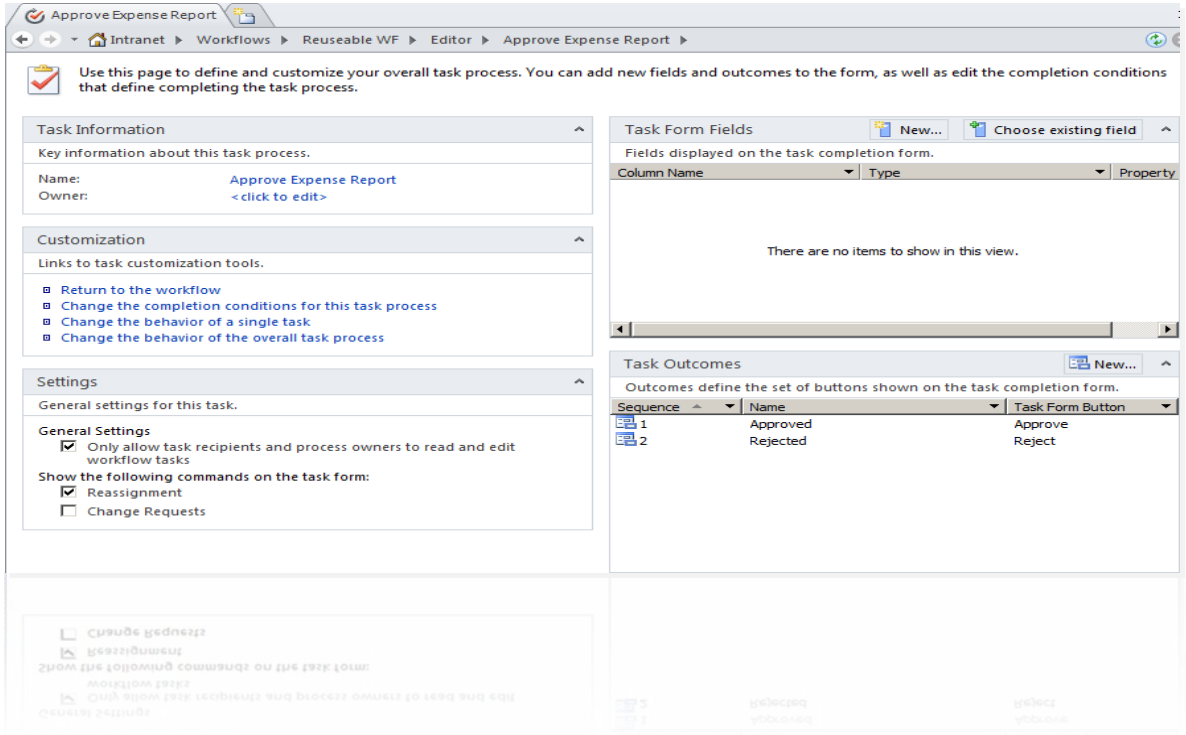


# Task Process Designer

- View all task information
- Customize the whole process, or individual tasks (or both)
- Build robust behaviors
  - "If 50% agree, auto-approve"
  - "If user is unavailable, escalate to manager"
  - "If this task wasn't meant for me, let me reassign it to another user"

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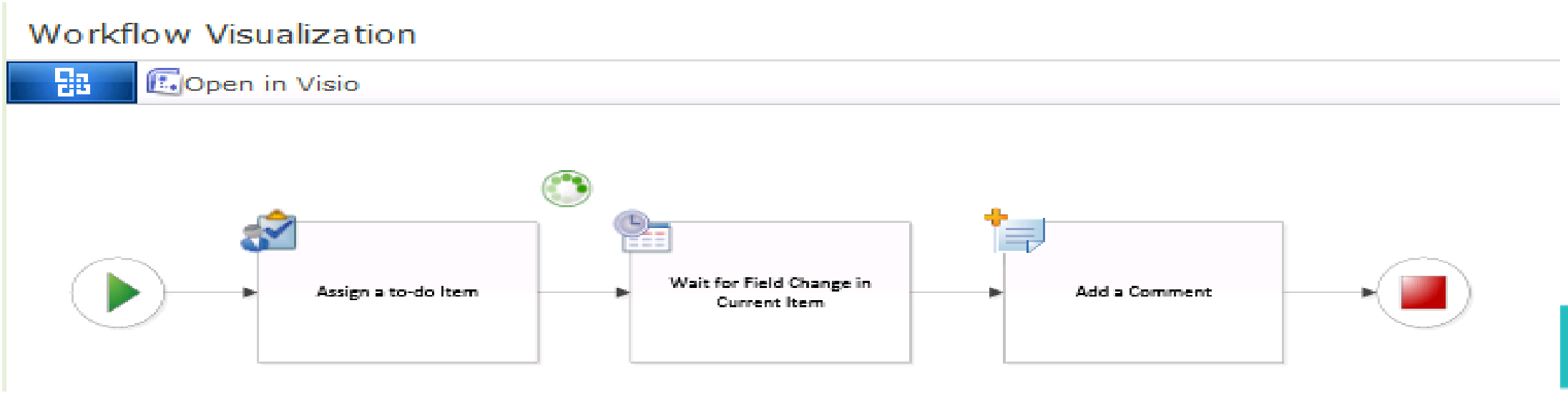
Visio 2010 SharePoint Designer 2010 Visual Studio 2010

Microsoft SharePoint 2010

# Visio Visualization

- Visualize a single workflow instance
  - Not for aggregation, reporting or auditing
  - Only for SharePoint Designer

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Visio 2010 SharePoint Designer 2010 Visual Studio 2010

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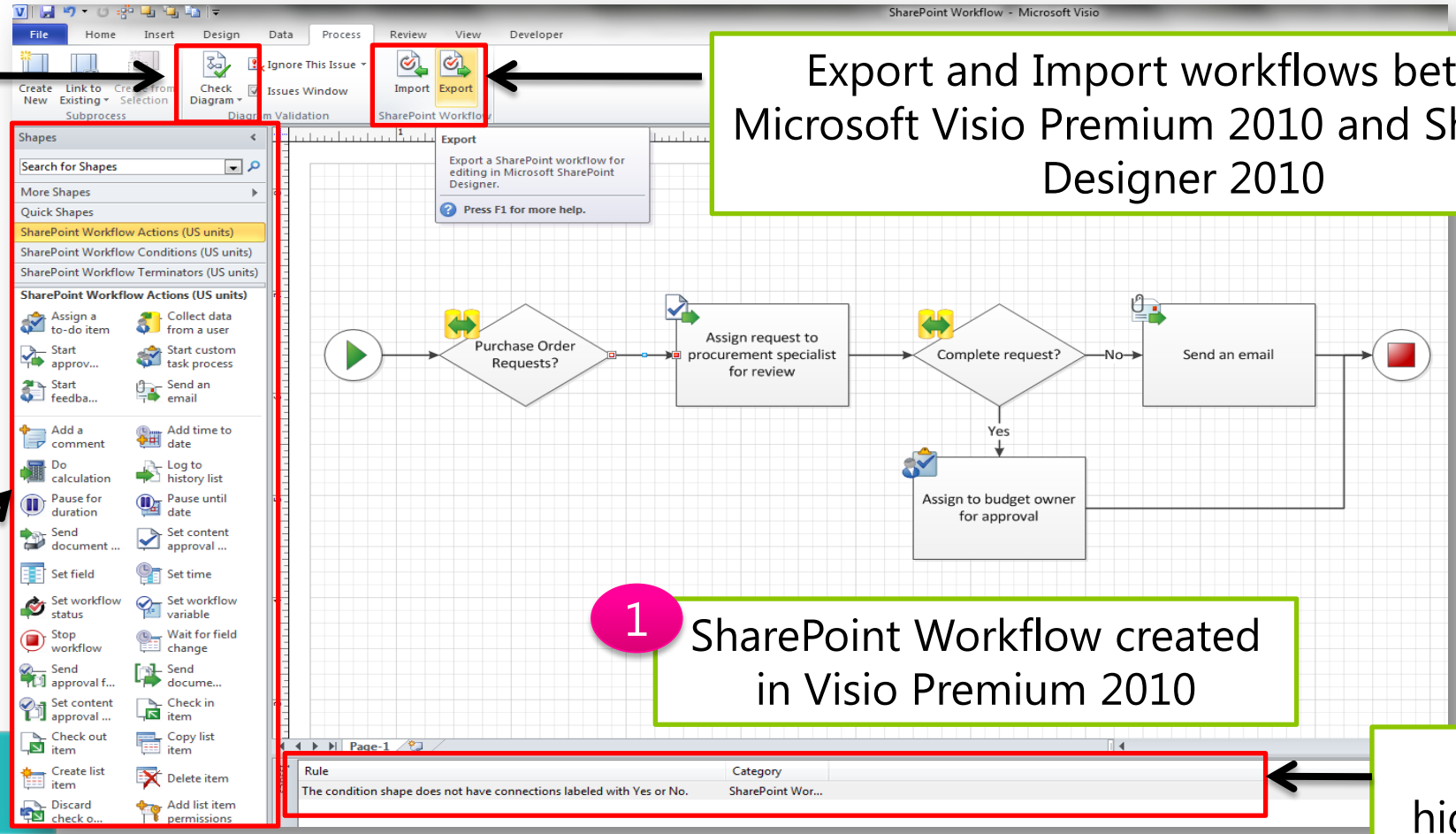
# Develop Workflows with Visio 2010 & SharePoint 2010 with No Coding

Diagram Validation

SharePoint Workflow Actions and Conditions

Export and Import workflows between Microsoft Visio Premium 2010 and SharePoint Designer 2010




1 SharePoint Workflow created in Visio Premium 2010

Issues window highlighting workflow errors

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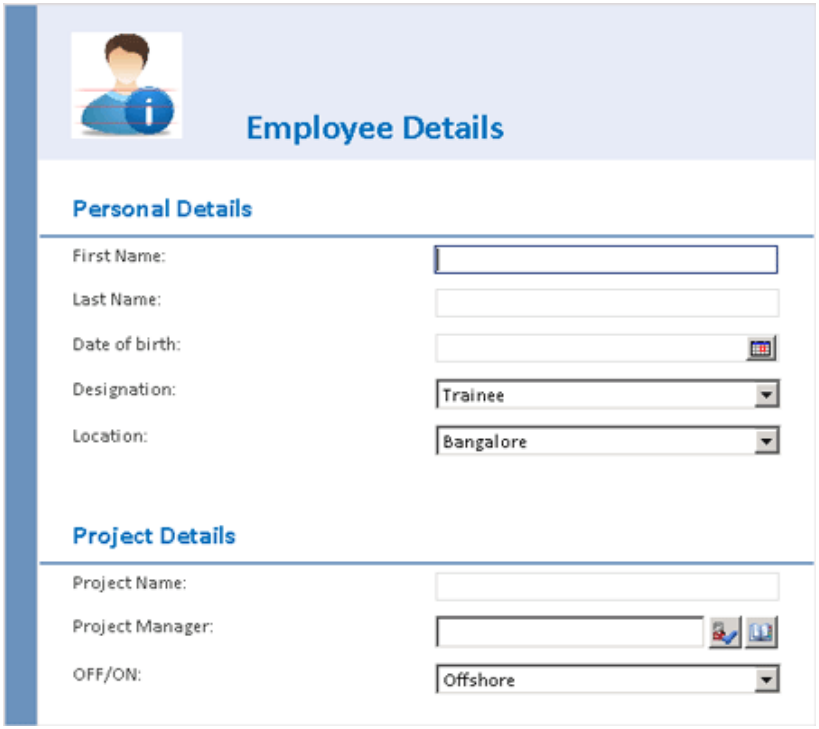
# Powerfull with InfoPath

Columns

A column stores information about each item in the list. Because this list allows
specified by the content type of the item. The following columns are currently a

| Column (click to edit) | Type |
|---|---|
| Date of birth | Date and Time |
| Designation | Choice |
| First Name | Single line of text |
| Last Name | Single line of text |
| Location | Choice |
| OFF/ON | Choice |
| Project Manager | Person or Group |
| Project Name | Single line of text |
| Created By | Person or Group |
| Modified By | Person or Group |

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# Custom Activities

- Plug in your own custom activities
  - Fully trusted deployment model, or…
  - Limited functionality when deployed as Sandboxed solution
- Or build on top of existing activities
  - OfficeTask exposed in Visual Studio
- Leverage in existing workflows

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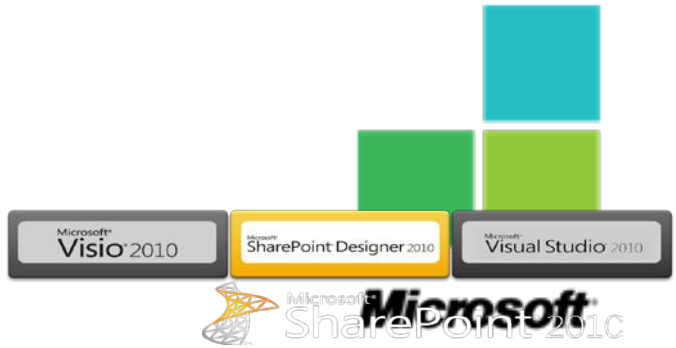
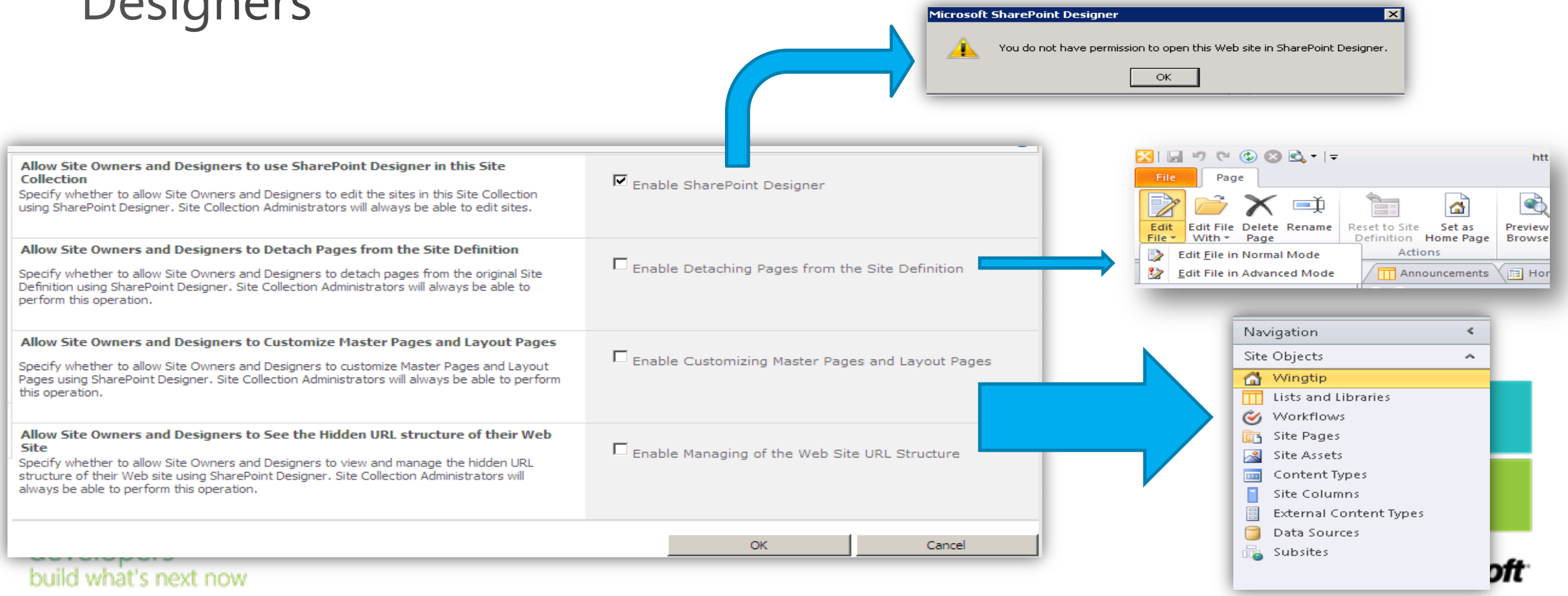


# Restricting SharePoint Designer

## Revoke permissions as needed from Site Owners and Designers

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# From the field

- SharePoint Designer doesn't have a "Worfklow only Mode"
- Setup up Governance Model can be challenging
  - Open for everybody or only a specific trained group?
  - Connect to production or follow DTAP process?
  - Who is doing support?
- Workflows can be very Task driven
  - Be aware of mail overflow
  - Clean up completed tasks

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Workflow

# Visual Studio 2010

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# Visual Studio 2010 Workflow

## Maximum Flexibility

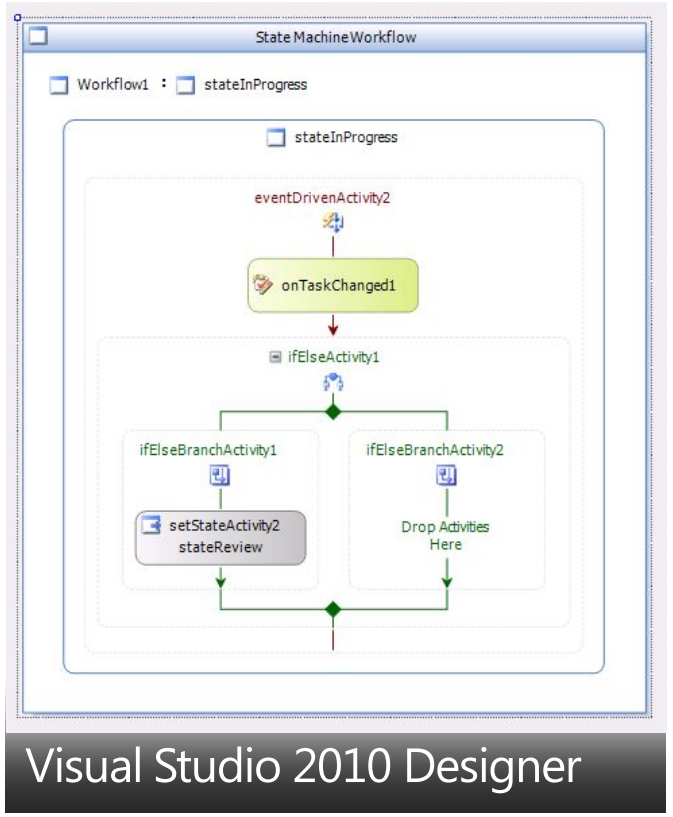
Based on Workfklow Foundation
Visual Designer for Stated, Events and Actions

## VS provided Templates

Workflow templates
Custom Action template
ASP.NET association forms template
.....

## Deployment

Just like any other solution (WSP)




Visual Studio 2010 Designer

State machine

Sequential

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# From the Field

- Workflows created in Visual Studio provide maximum flexibility
- Don’t over automate the process, keep simple tasks out of the workflow
- Mostly used as a State Machine workflow
- Very common to interact with backend systems

- Example: http://code.msdn.microsoft.com/SharePoint-2010-Creating-39ac75ea

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Workflow

# Third Party

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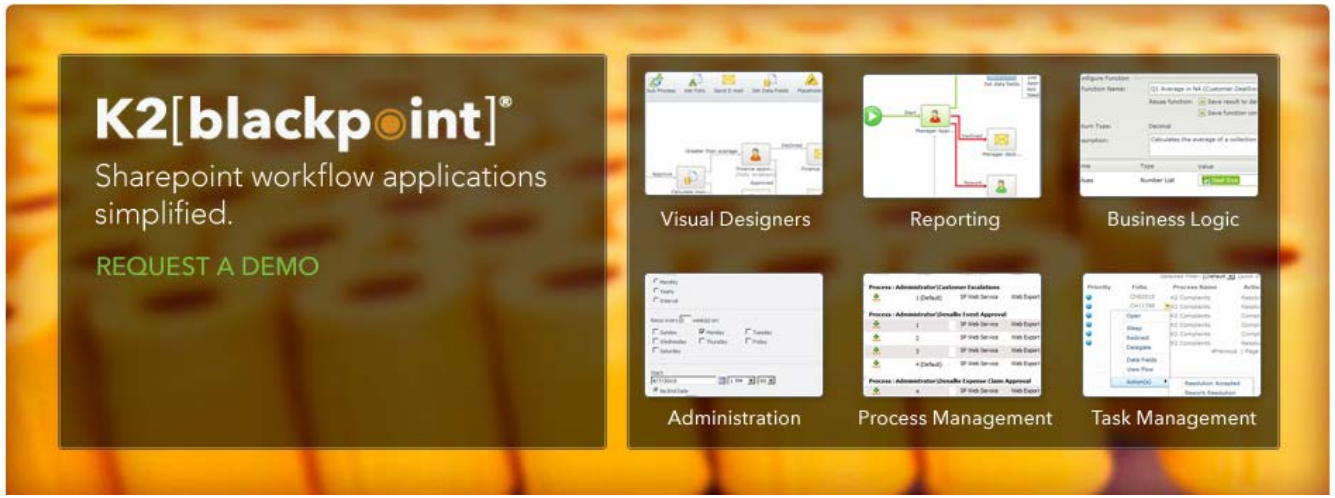


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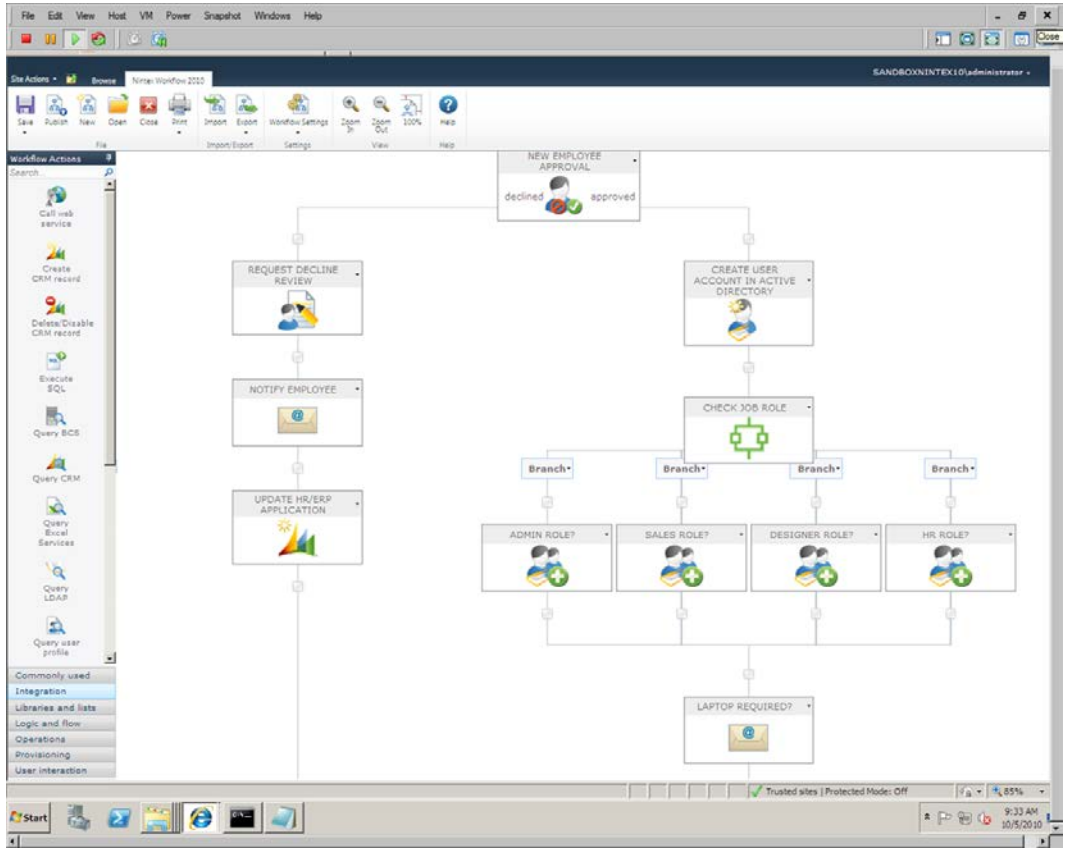
# Nintex Workflow

- Integrated in SharePoint
- No additional tool required
- Visual status representation
- Power User

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