



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



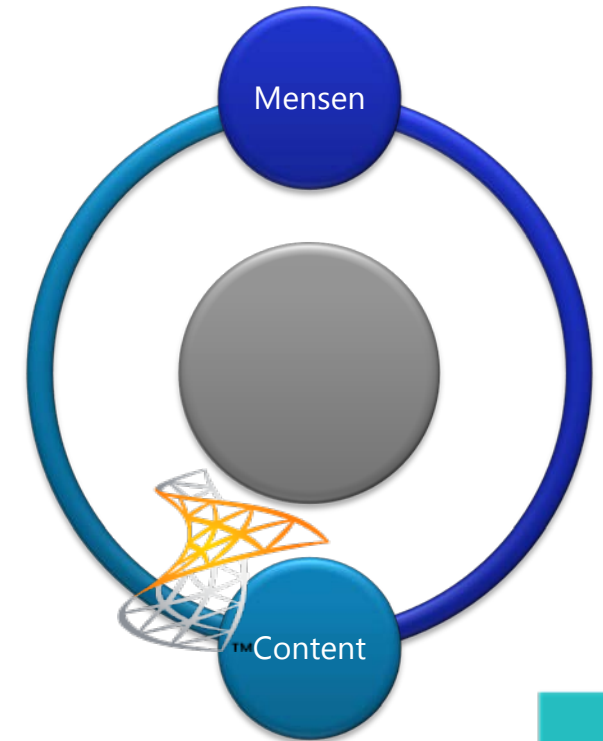
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Introduction

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

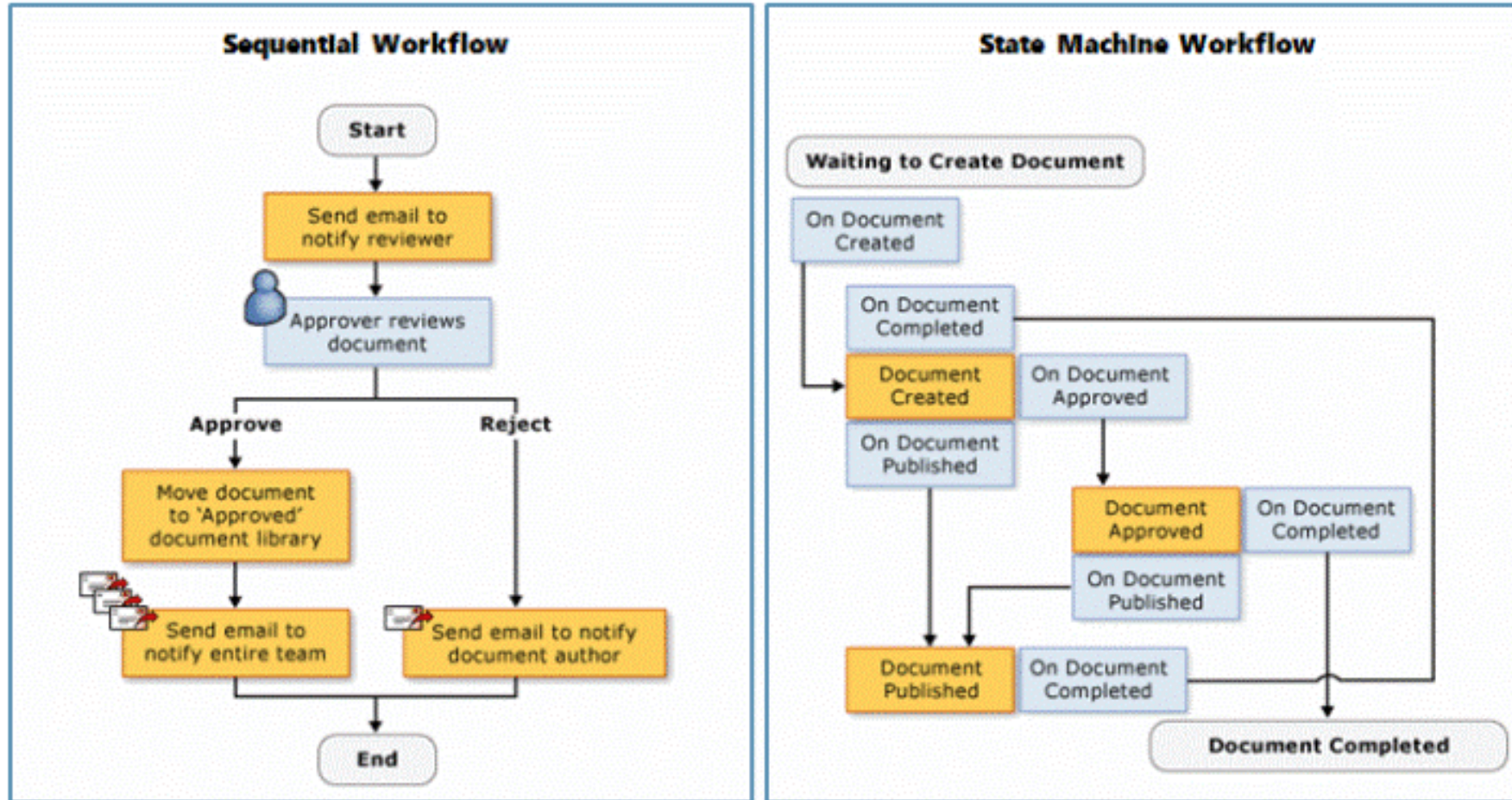


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Types of workflows

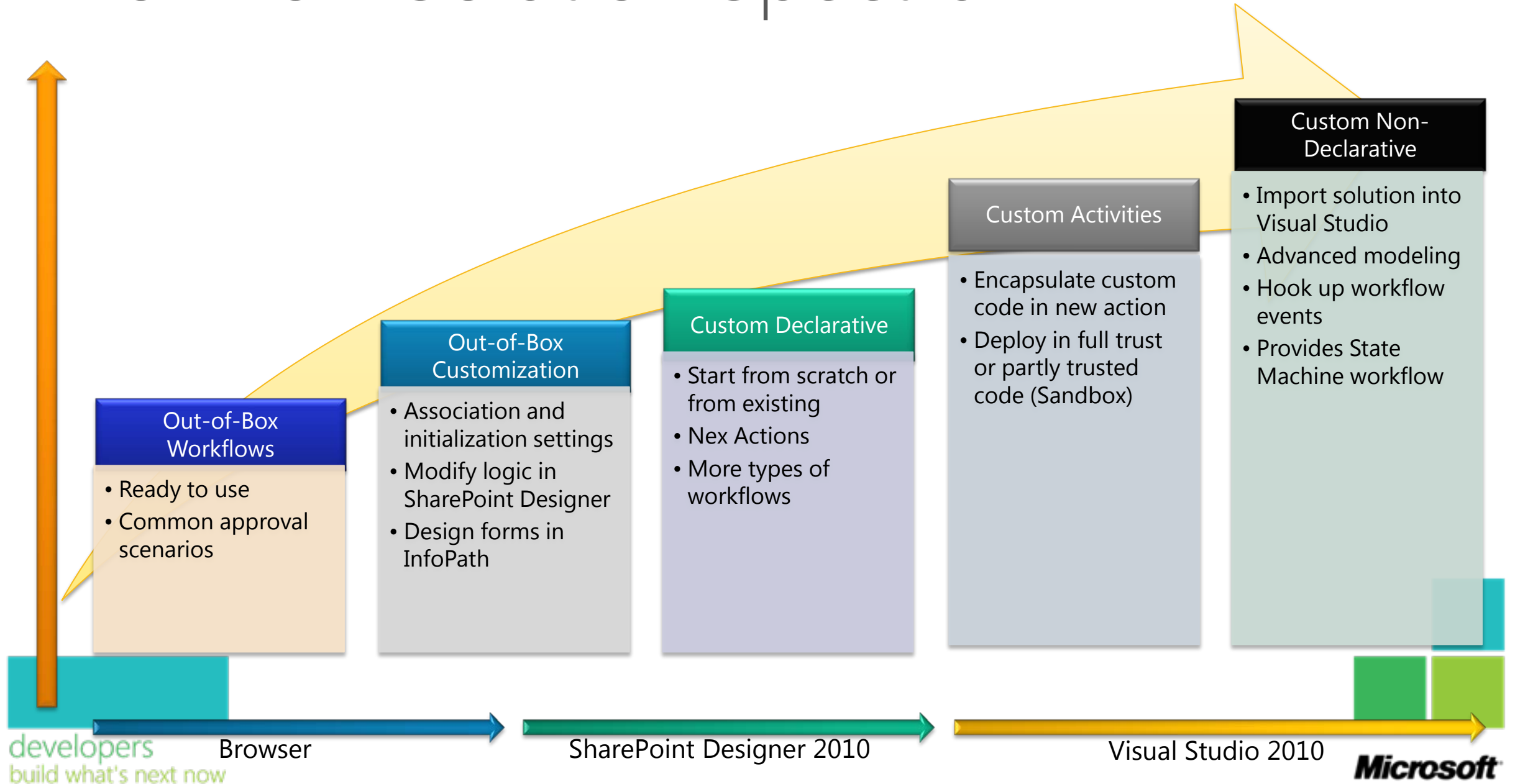


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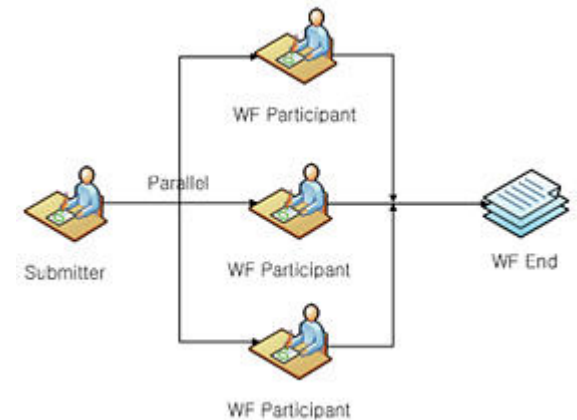
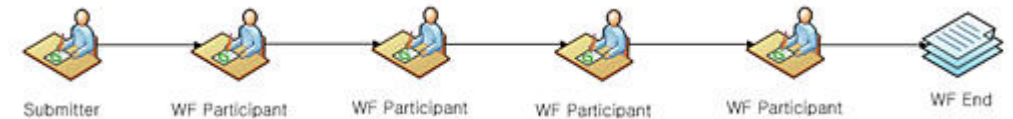
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Workflow Solution Spectrum



Out of the box workflows

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



Voorbeeld - Declareren

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



From the Field

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



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Workflow

SharePoint Designer 2010

What is SharePoint Designer?



In Experienced Hands



In Non-Experienced Hands



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...

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"

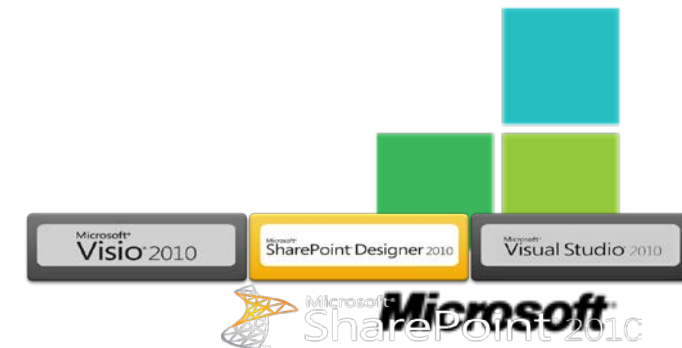
The screenshot shows the 'Approve Expense Report' task process configuration page. The interface is divided into several sections:

- Task Information:** Displays the task name 'Approve Expense Report' and a link to edit it.
- Customization:** Provides links to return to the workflow, change completion conditions, change task behavior, and change overall task process behavior.
- Settings:** Includes general settings for the task, such as 'Only allow task recipients and process owners to read and edit workflow tasks' (checked), and 'Show the following commands on the task form' (Reassignment checked, Change Requests unchecked).
- Task Form Fields:** A section for defining fields displayed on the task completion form, currently empty.
- Task Outcomes:** A table defining the set of buttons shown on the task completion form.

Sequence	Name	Task Form Button
1	Approved	Approve
2	Rejected	Reject



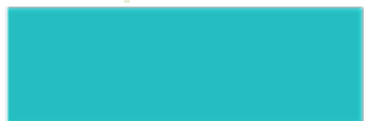
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Visio Visualization

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

Workflow Visualization



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Develop Workflows with Visio 2010 & SharePoint 2010 with No Coding

Diagram Validation

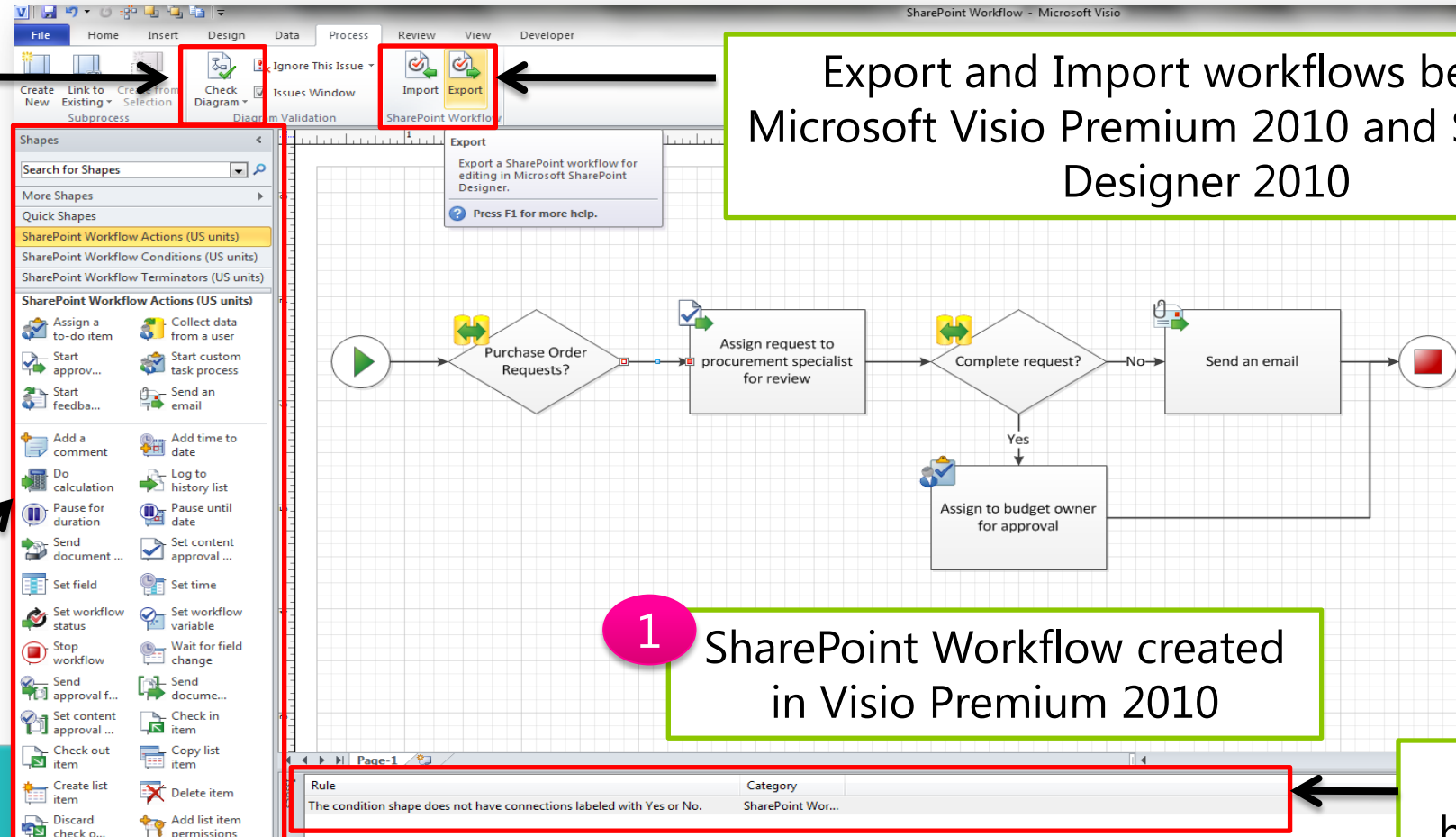
Export and Import workflows between Microsoft Visio Premium 2010 and SharePoint Designer 2010

SharePoint Workflow Actions and Conditions

1

SharePoint Workflow created in Visio Premium 2010

Issues window highlighting workflow errors

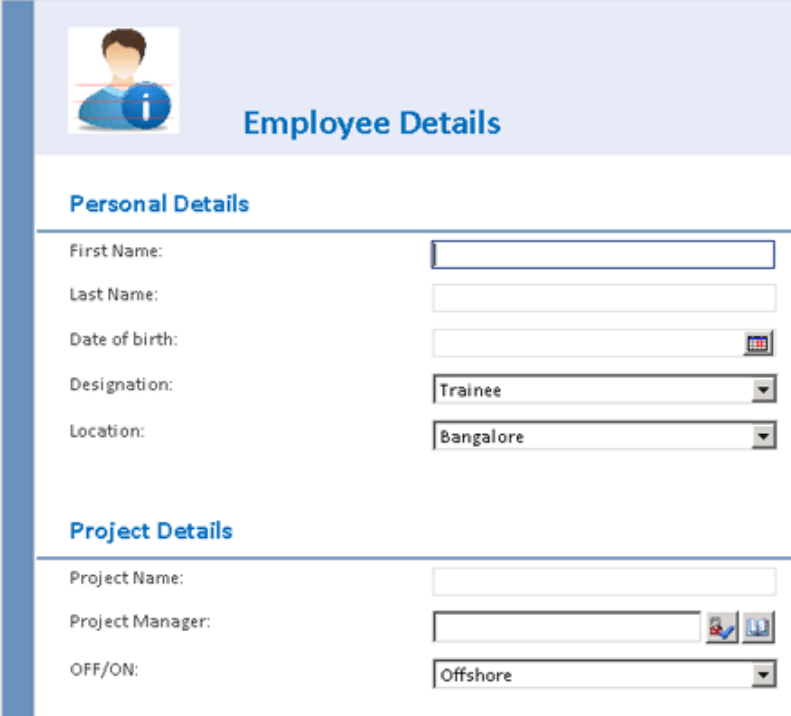


Powerfull with InfoPath

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





The form is titled "Employee Details" and features a header with a person icon and an information icon. It is divided into two main sections: "Personal Details" and "Project Details".

Personal Details

- First Name:
- Last Name:
- Date of birth: 
- Designation:
- Location:

Project Details

- Project Name:
- Project Manager:  
- OFF/ON:



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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

Restricting SharePoint Designer

Revoke permissions as needed from Site Owners and Designers

The diagram illustrates the process of restricting SharePoint Designer permissions. It shows three key steps:

- Step 1:** In the **Allow Site Owners and Designers to use SharePoint Designer in this Site Collection** dialog, the **Enable SharePoint Designer** checkbox is checked. A blue arrow points from this checkbox to an error message box that says: "You do not have permission to open this Web site in SharePoint Designer."
- Step 2:** In the same dialog, the **Enable Detaching Pages from the Site Definition** checkbox is unchecked. A blue arrow points from this checkbox to the **Edit File** menu in the SharePoint Designer interface.
- Step 3:** In the same dialog, the **Enable Customizing Master Pages and Layout Pages** checkbox is unchecked. A blue arrow points from this checkbox to the **Wingtip** site in the **Site Objects** list.

The SharePoint Designer interface shows the **File** menu with options like **Edit File**, **Edit File With**, **Delete Page**, **Rename**, **Reset to Site Definition**, **Set as Home Page**, and **Preview Browse**. The **Site Objects** list includes **Wingtip**, **Lists and Libraries**, **Workflows**, **Site Pages**, **Site Assets**, **Content Types**, **Site Columns**, **External Content Types**, **Data Sources**, and **Subsites**.

From the field

- SharePoint Designer doesn't have a "Workflow 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

Visual Studio 2010 Workflow

Maximum Flexibility

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

VS provided Templates

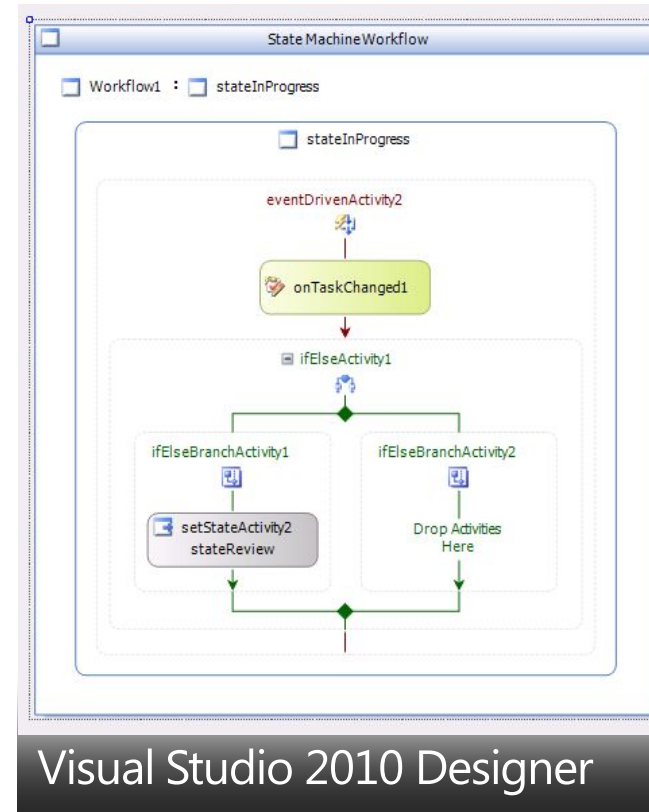
Workflow templates
Custom Action template
ASP.NET association forms template
.....

Deployment

Just like any other solution (WSP)



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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




K2[blackpoint][®]

Sharepoint workflow applications simplified.


[REQUEST A DEMO](#)




Visual Designers



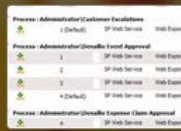
Reporting




Business Logic



Administration



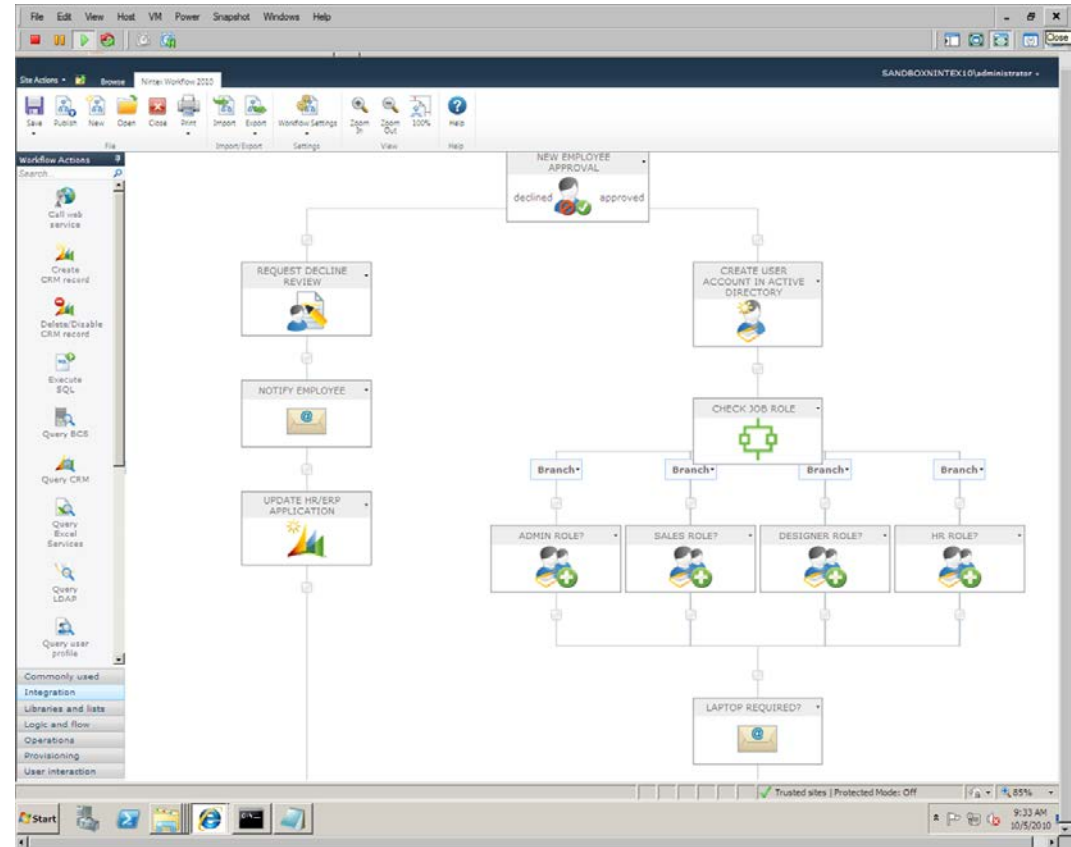
Process Management



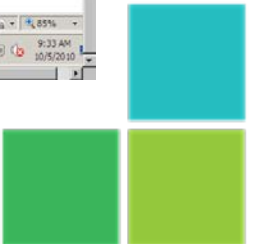
Task Management

Nintex Workflow

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



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