SharePoint Specialist Test Task Solution

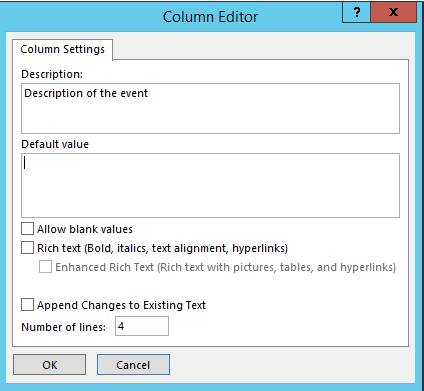
by Kirill Revenkov

I made the task with SharePoint 2013, Russian language pack, so there could be some differences between original names and my translation. Also sometimes you will see Russian language on screenshots. I use web interface and SP Designer 2013 to complete the task. SP 13 has been used because I don’t have SP 16 on server.

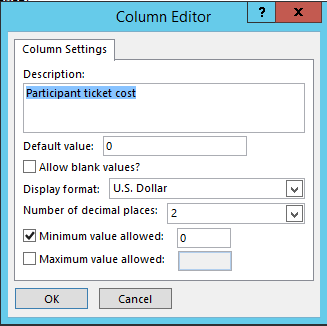
Step 1. Create list

1. Add a custom list
2. At List Settings-Additional settings set read permissions to "read all elements" and create and modify permissions to "Create and modify all elements".
3. Forbid attachments (because there is no info about attachments is task).
4. Create site columns. According to the task they are:

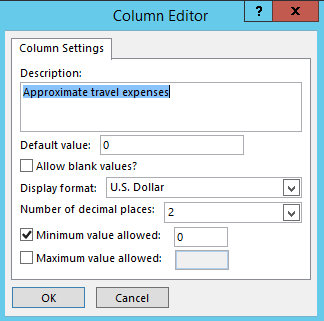
**Description** (multi line text)



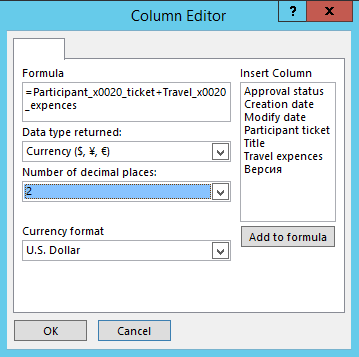
**Participant ticket** (currency)



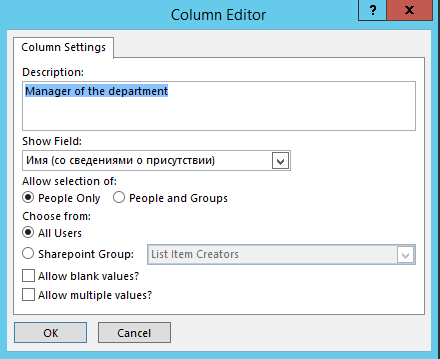
**Travel expenses** (currency)



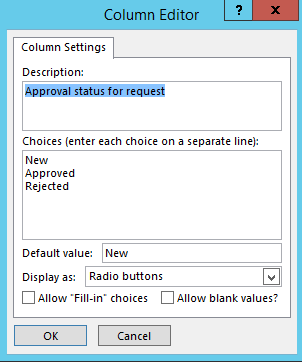
**Total cost** (currency, computed field)



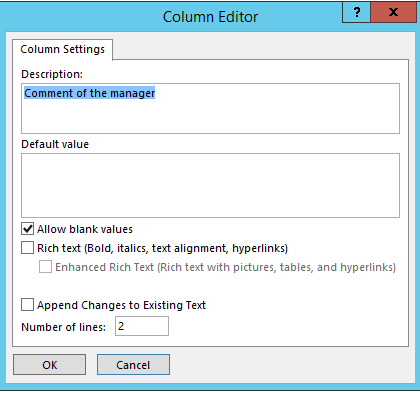
**Manager** (person or group)



**Approval status** (choice)



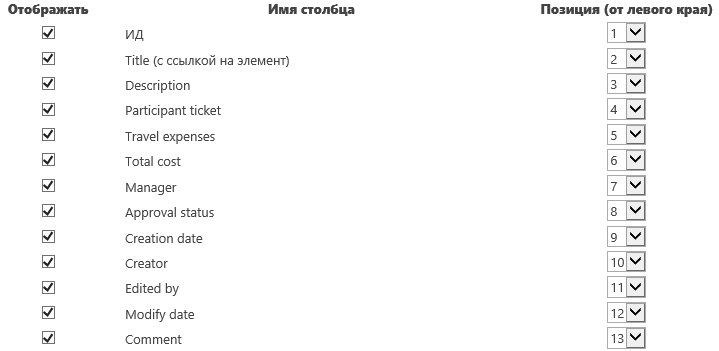
**Comment** (multi line text)



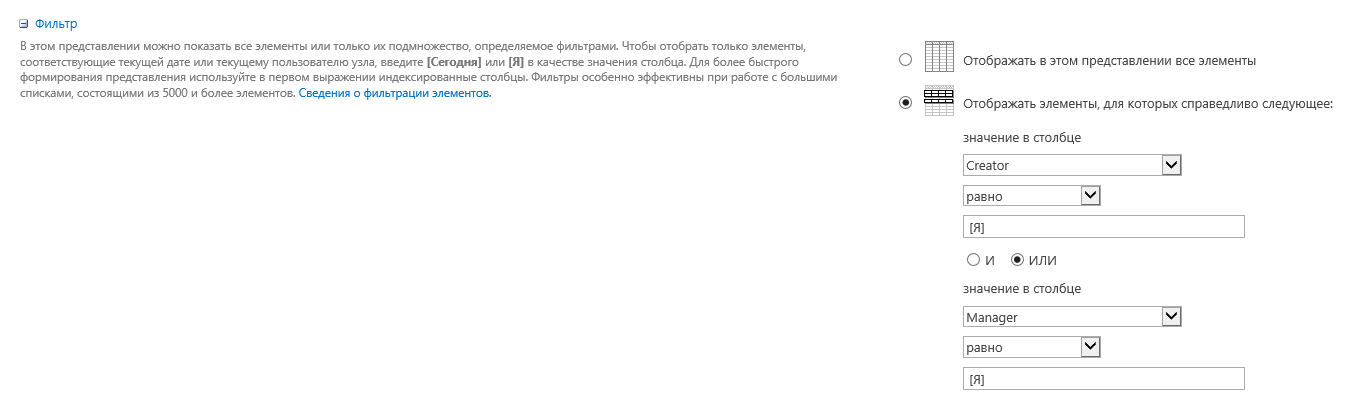
Step 2. Create view

We create view where user can see only items created by him or her, or items assigned to him or her

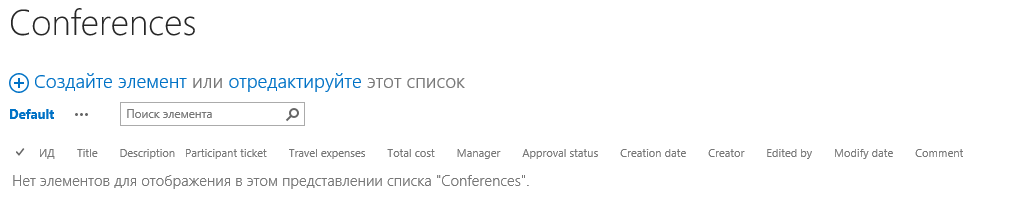
1. Make an order of columns like in figure below.



1. Sort by ID in descending order.
2. Set up filter. If author or creator == current user, then view will show item.



Result:



Step 3. Customize forms (in SP Designer)

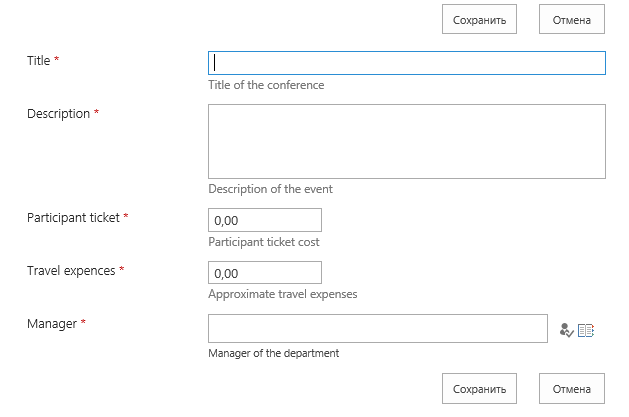
1. Display form

Standard form. Nothing to change.

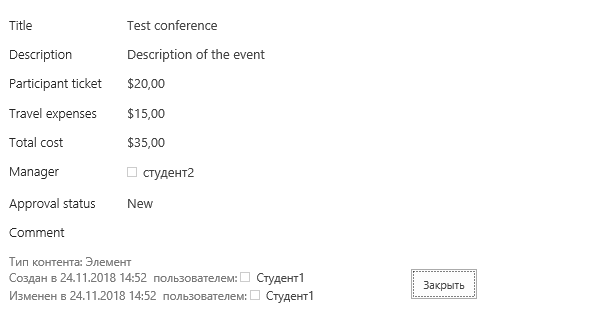
1. New item form
2. Create new form for new items(CustomNewForm.aspx)
3. Hide fields “Approval status” and “Comment because” creator should not fulfill them. We are hiding these fields by adding “display: none” style to necessary rows in Designer’s editor.



1. Set CustomNewForm.aspx as default form for new items.



1. Edit item form
2. Create new Edit form(CustomEditForm.aspx)
3. Make all fields read only(to prevent wrong changes). We can make it be copying table structure from display form.



Step 4. Create permissions levels.

1. List items create permissions level. This level provides permissions to create and delete list items.

On site settings menu we should create new permissions level (by copying permissions from read level) and in list permissions check only:

* Add Items
* View Items
* Open Items
* View Versions
* Create Alerts
* View Application Pages

1. List Items modify permissions level. This level of permissions allows modifying list items without creation.

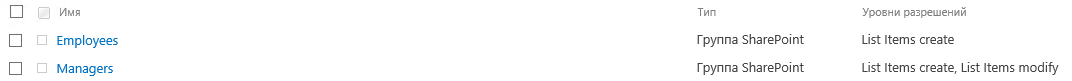
On site settings menu we should create new permissions level (by copying permissions from read level) and in list permissions check only:

* Edit Items
* View Items
* Open Items
* View Versions
* Create Alerts
* View Application Pages

Step 5. Create user groups.

On site settings menu we should go to “Users and Groups” and create 2 groups for our list. One for employees and other for managers.

Step 6. Made unique permissions for list and add groups from step 5 with permissions prescribed above:



Note: there should be also permissions for users with full rights to manage this list.

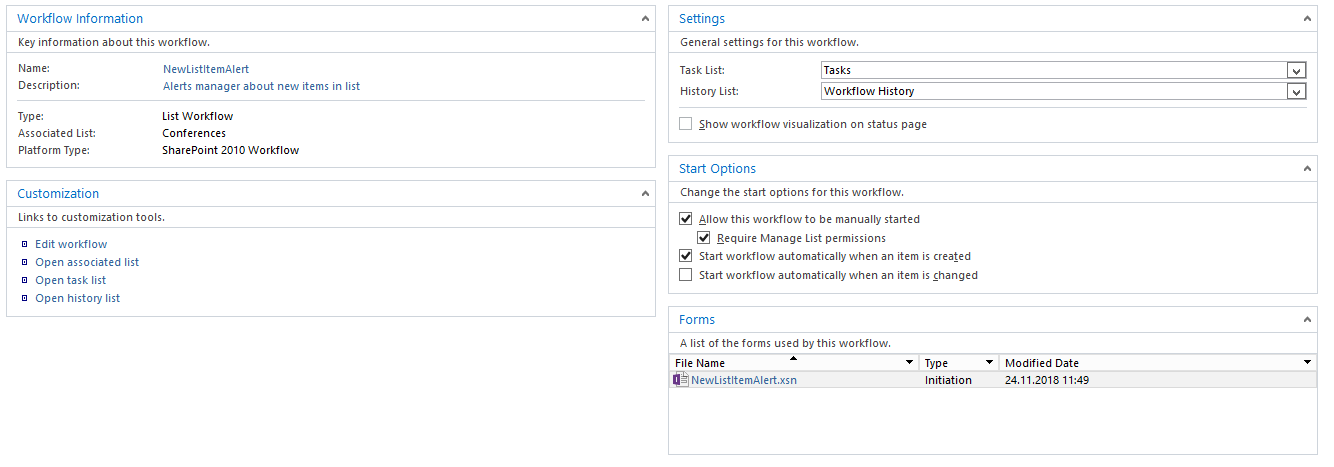
Step 7. Create workflows.

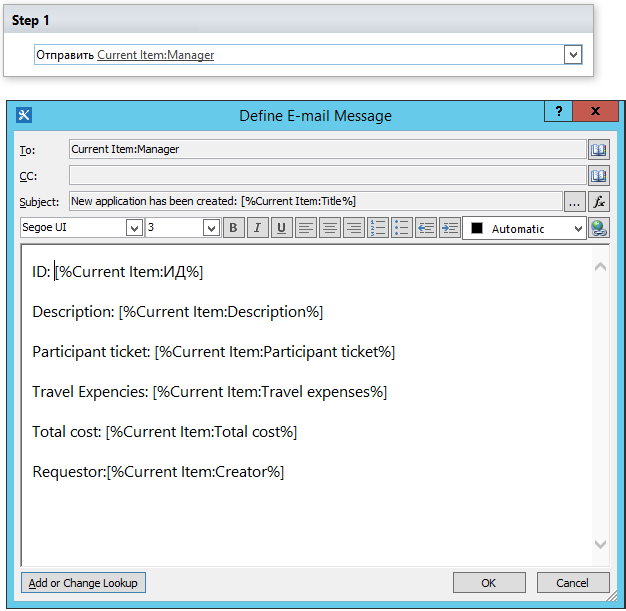
There will be 3 workflows:

* NewListItemAlert
* DeleteListItem
* ChangeStatusByManager

1. NewListItemAlert

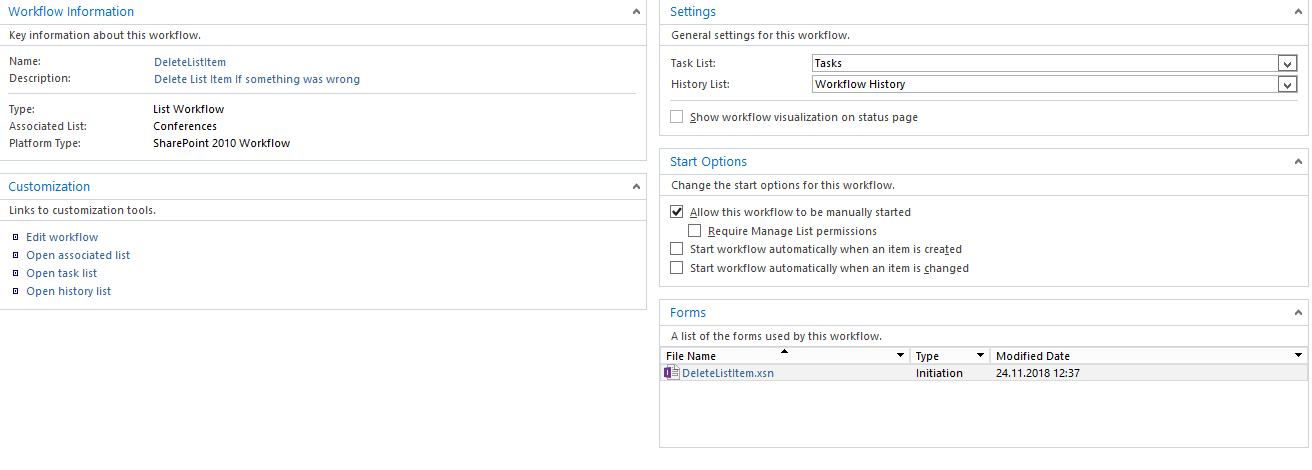
This workflow send notification to manager (from field “Manager”), with all information. Starts on creation of items. We should check “Require list permissions” to prevent additional launches by users.



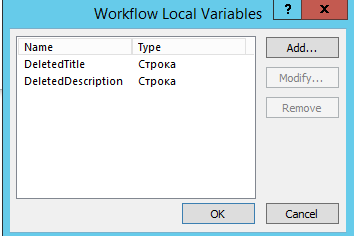


1. Delete list item.

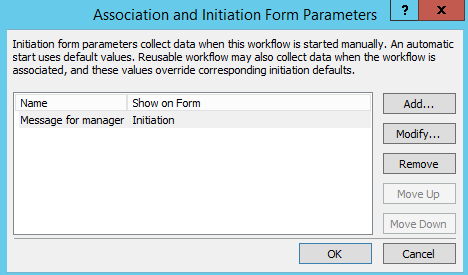
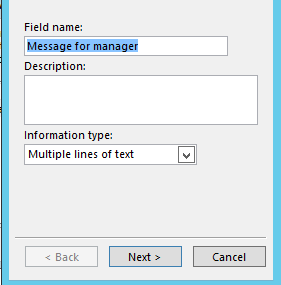
This workflow deletes selected item only if initiator is the creator of the item. You should create this workflow by user with full rights on the list because it uses impersonalisation step.



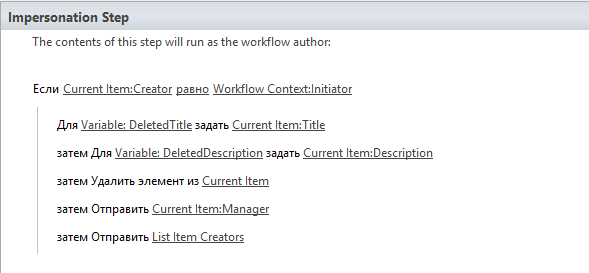
* Add impersonalisation step
* Add local variables

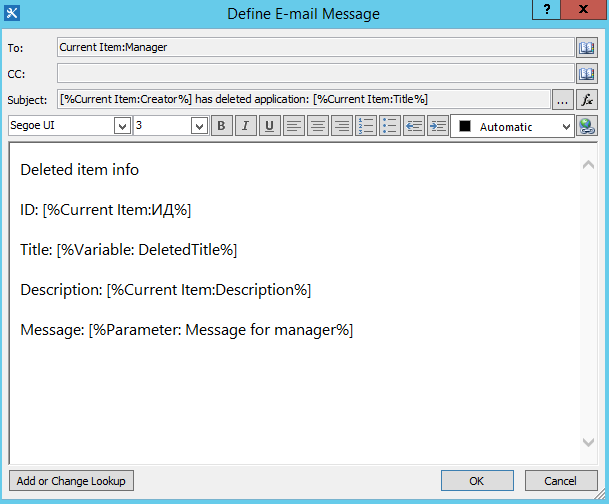
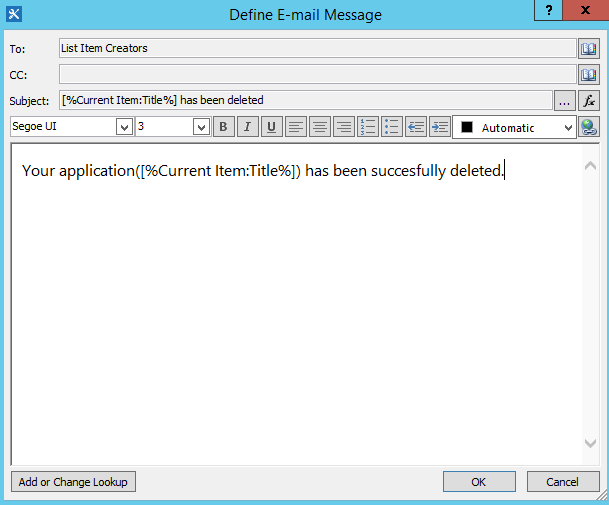


* Add form parameters(for additional message for manager)

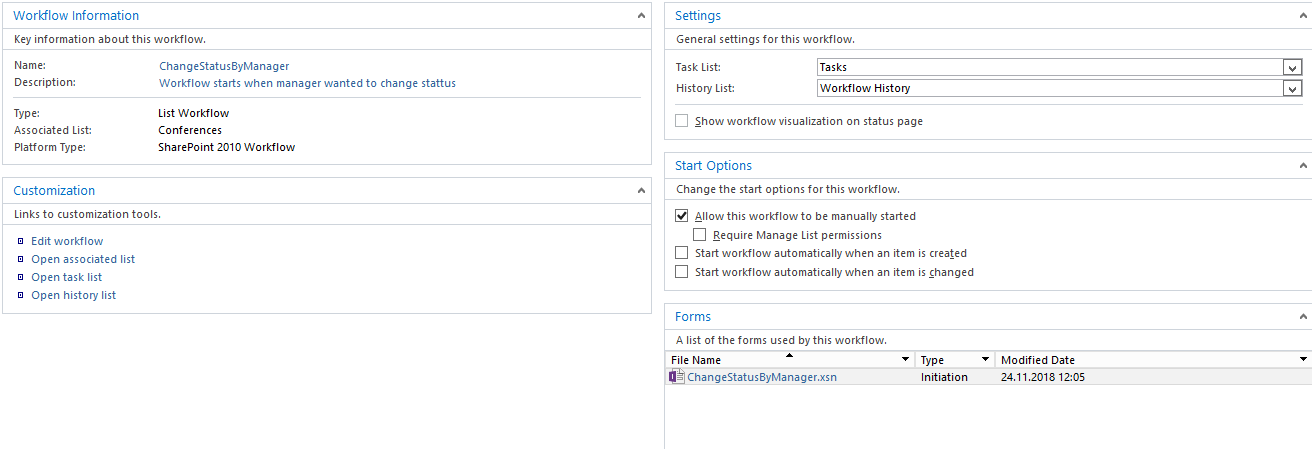
* Check Initiator == Creator
* If check successful then delete item and send notifications to manager and initiator



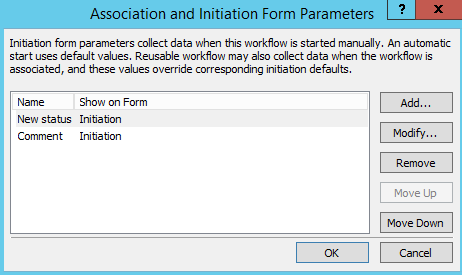
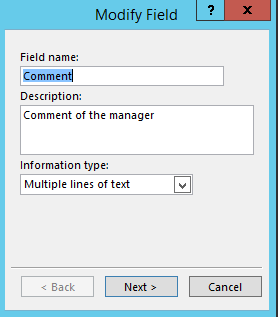
 

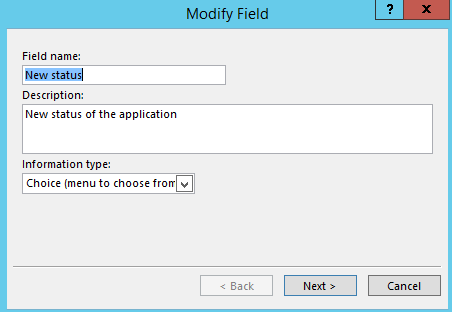
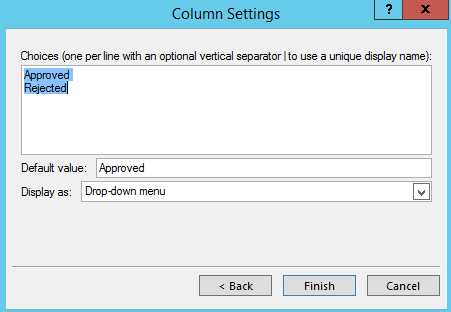
1. Change status by manager.

This workflow manager to change status of the item. It asks status and comment of the manager before it starts.

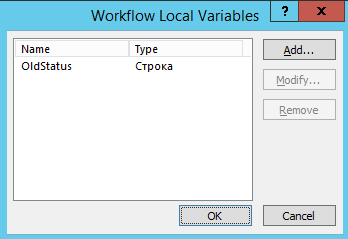


* Add form parameters

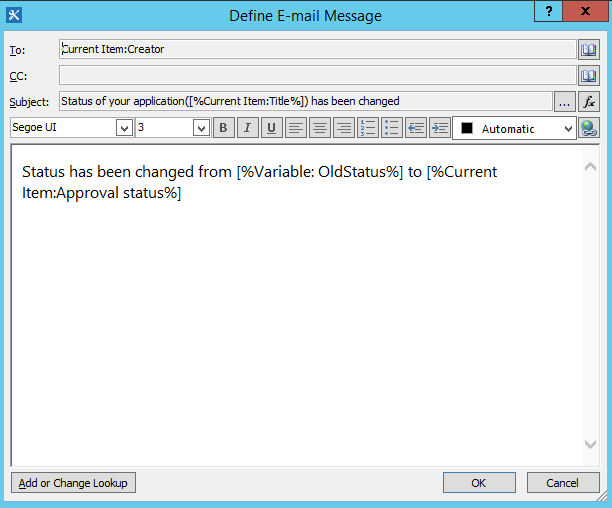
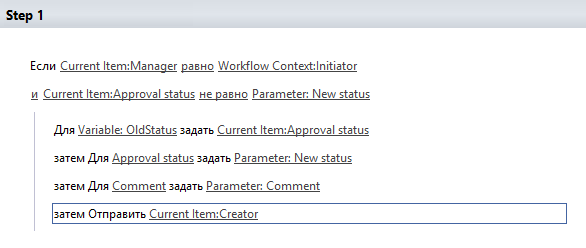
 

* Add local variable(for old status)

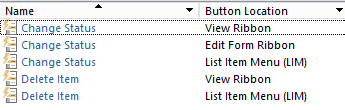


* If field “Manager” in list == initiator and status is change then update fields and send notification to author of the item.



Step 8. Add custom actions to list.

Add workflows buttons to different areas of the list.



Step 9. Delete workflow columns from view

Uncheck workflow status columns from our view.



How it will work

User can create item. User can delete item (for example, when user made a mistake) only if it has status “New”. User can’t modify item.

Manager can only change approval status of the element assigned to him and leave a comment.