

# Lesson: Creating Custom Workflows with SharePoint Designer 2013

Welcome to our free Advanced SharePoint 2013 tutorial.

In this lesson, you will learn all about creating custom workflows in SharePoint.

## Lesson Goals

- Learn about workflow basics.
- Learn how to create a List Workflow using SharePoint Designer 2013.
- Learn how to run a workflow.
- Learn how to view a workflow's history.
- Learn how to add Actions to a workflow.
- Learn how to add Conditions to a workflow.
- Learn how to add parameters to a workflow initiation form.
- Learn how to create a reusable workflow.
- Learn how to associate a reusable workflow with a list/library.

## Workflow Basics

Workflows are a popular way to perform automated work in SharePoint. The pay versions of SharePoint Server, Standard and Enterprise, come with extra out-of-box workflows that can be associated and configured with lists and libraries using just the browser. Custom workflows can be created with software applications such as SharePoint Designer 2013 or Visual Studio 2012.

SharePoint Designer is a powerful and fairly easy-to-use tool for creating custom workflows and does not require any formal developer skills. Visual Studio, although extremely powerful in creating custom workflows, requires developer skills to use.

The walk-throughs and exercises in this course will focus on using SharePoint Designer 2013 to create custom workflows.

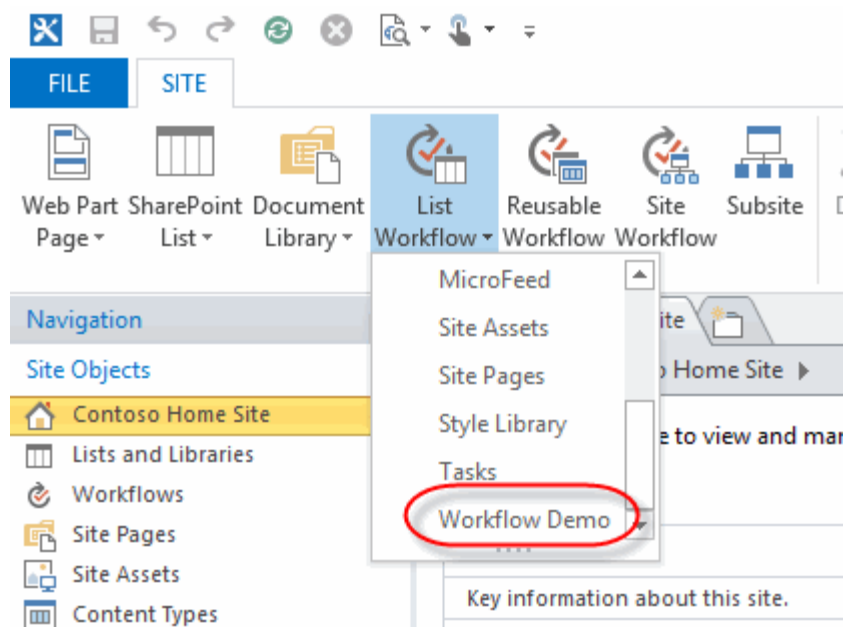
# Custom List Workflows

SharePoint Designer 2013 is a perfect tool for creating custom workflows for lists and libraries. When you create a list workflow, it is associated with a specific list or library at creation time and has access to any metadata of the item the workflow is run against.

The following walk-through will show you how to create a very basic custom list with a couple of custom columns. Once the list is created the walk-through shows how to use SharePoint Designer 2013 to create an associated custom workflow with the list. Later walk-throughs will build upon the workflow created in this walk-through.

1. Create a new custom list in your site named "Workflow Demo".
  1. Click the **Settings** menu and choose the **Add an app** item.
  2. Select **Custom List** from the template choices and type "Workflow Demo" in the **Name** field.
  3. Click the **Create** button to complete creating the list.
2. Add a choice column named "Colors" and a text column named "Workflow Output" to **Workflow Demo** list.
  1. Click the **Create Column** link on the **LIST** tab toolbar.
  2. Type "Colors" in the **Column name** field and select **Choice** for the data type option.
  3. Enter "Red", "Blue", and "Green" on separate lines in the choices field within the **Additional Column Settings** area.
  4. Click the **OK** button to complete creating the column.
  5. Click the **Create Column** link on the **LIST** tab toolbar.
  6. Type "Workflow Output" in the **Column name** text-box field.
  7. Click the **OK** button to create the column.
3. Launch SharePoint Designer 2013 and create a **List Workflow** associated with the **Workflow Demo** list.
  1. Open SharePoint Designer 2013 and then open your team site in Designer.

2. On the **Site** tab toolbar, click the **List Workflow** drop-down button and choose the **Workflow Demo** list.



3. Type "Workflow Demo-WF" in the **Name** field of the **Create List Workflow** dialog and click the **OK** button.

Create List Workflow - Workflow Demo

Add a new workflow to your list

Enter a name and description for your new workflow

Name: Workflow Demo-WF

Description:

Choose the platform to build your workflow on

Platform Type: SharePoint 2010 Workflow

The option for the SharePoint 2013 Workflow platform is not available because the workflow service is not configured on the server. Please contact your server administrator.

OK Cancel

4. Leave the workflow open in SharePoint Designer for the next walk-through.

## Workflow Actions

Workflow Actions are the main working component in a SharePoint Designer workflow. SharePoint Designer is limited to being able only to do things that are defined in an Action. However, SharePoint comes with a wide range of Actions out-of-box. The following is a grouped list of Actions available in a default installation of SharePoint Server 2013:

- **Core Actions**
  - Add a Comment
  - Add Time to Date
  - Do Calculation

- Log to History List
- Pause for Duration
- Pause until Date
- Send an Email
- Set Time Portion of Date/Time Field
- Set Workflow Status
- Set Workflow Variable
- Stop Workflow
- **Document Set Actions (not available in SharePoint Foundation)**
  - Capture a version of the Document Set
  - Send Document Set to Repository
  - Set Content Approval Status for the Document Set
  - Start Document Set Approval Process
- **List Actions**
  - Check In Item
  - Check Out Item
  - Copy List Item
  - Create List Item
  - Declare Record
  - Delete Item
  - Discard Check Out Item
  - Set Content Approval Status
  - Set Field in Current Item
  - Undeclare Record (not available in SharePoint Foundation)
  - Update List Item
  - Wait for Field Change in Current Item
- **Relational Actions (not available in SharePoint Foundation)**
  - Lookup Manager for a User
- **Task Actions**
  - Assign a Form to a Group
  - Assign a To-do Item
  - Collect Data from a User

- Start Approval Process (not available in SharePoint Foundation)
- Start Feedback Process (not available in SharePoint Foundation)
- **Utility Actions**
  - Extract Substring from End of String
  - Extract Substring from Index of String
  - Extract Substring from Start of String
  - Extract Substring of String from Index with Length
  - Find Interval Between Dates

Some of the actions listed are not available with SharePoint Foundation 2013.

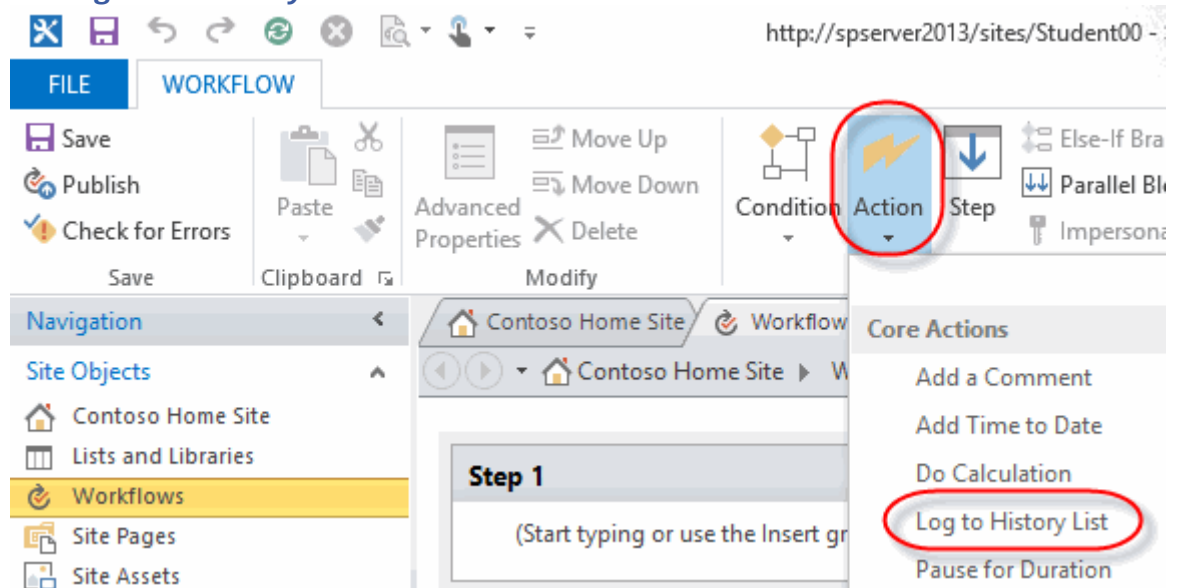
Additional Actions can be purchased, downloaded for free, or created by in-house developers and installed in SharePoint and then configured with SharePoint Designer just like out-of-the-box actions.

SharePoint Designer workflows are created by combining as many Actions as necessary to get the job done.

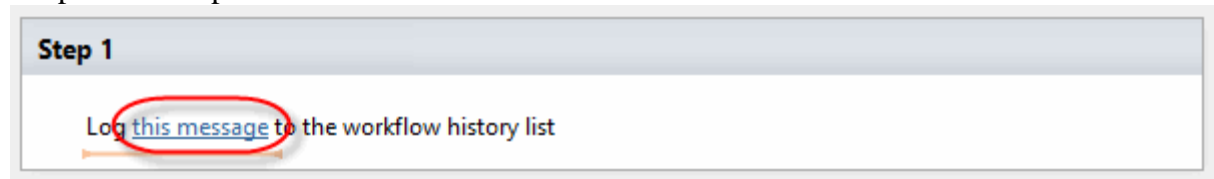
The following walk-through will show you how to add and configure a couple of actions to the workflow that was created in the previous walk-through.

1. Add a **Log to History List** action to the **Workflow Demo-WF**.

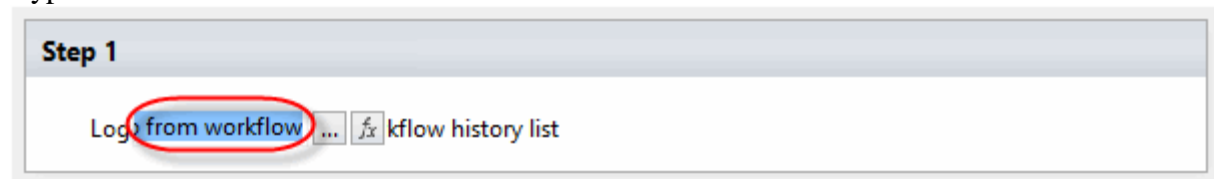
1. Click the **Action** drop-down button from the **Workflow** tab toolbar and select the **Log to History List** action.



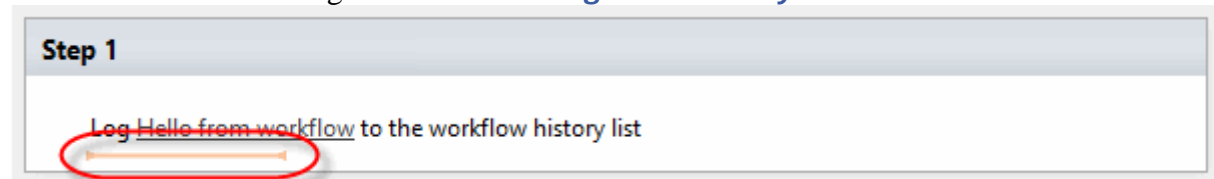
2. Click the this message link inside the **Log to History List** action added from the previous step.



3. Type "Hello from workflow" inside the text box field.

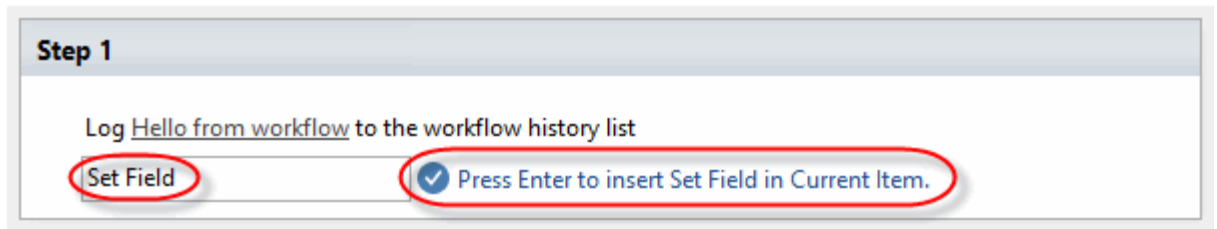


4. Hover and click the orange bar below the **Log to History List** action.



5. Type "Set Field" in the text box that appears when you start typing and press the Enter key to have SharePoint Designer insert the **Set Field in Current**

Item action.



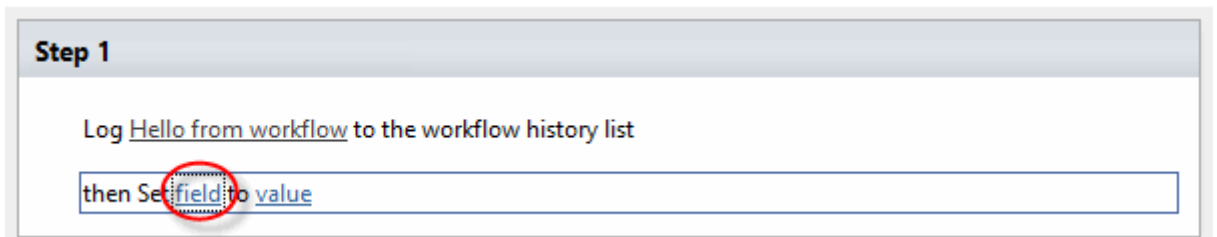
**Step 1**

Log [Hello from workflow](#) to the workflow history list

**Set Field** ☒ Press Enter to insert Set Field in Current Item.

This is just another way to add an action to a workflow. You could also use the **Workflow** tab's **Action** drop-down button like you did with the **Log to History List** action.

6. Click the field link inside the **Set Field in Current Item** action.

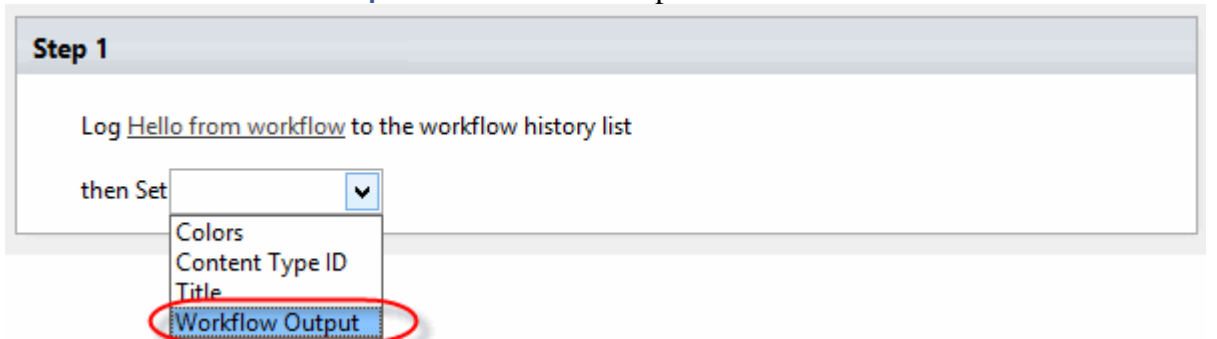


**Step 1**

Log [Hello from workflow](#) to the workflow history list

then Set [field](#) to [value](#)

7. Choose the **Workflow Output** field from the drop-down list.



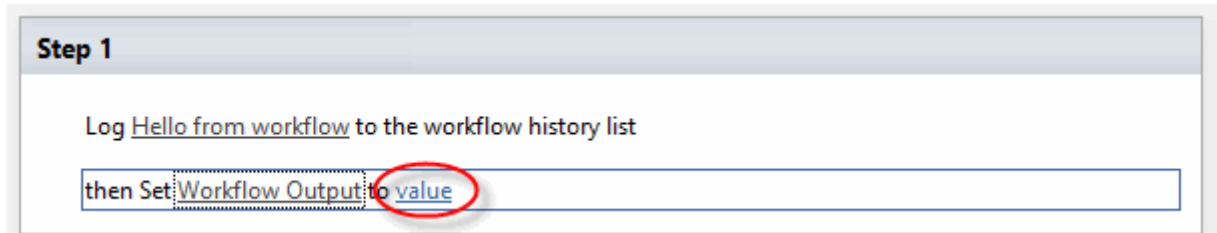
**Step 1**

Log [Hello from workflow](#) to the workflow history list

then Set

- Colors
- Content Type ID
- Title
- Workflow Output**

8. Click the **value** link inside the **Set Field in Current Item** action.



**Step 1**

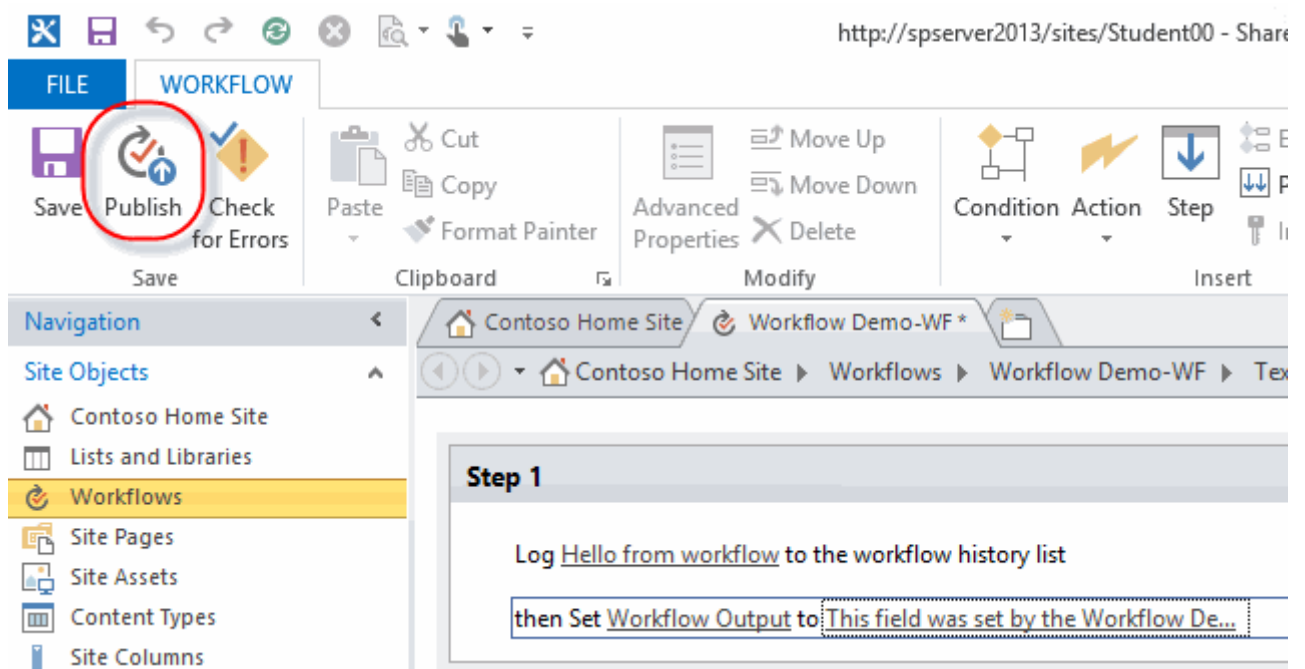
Log [Hello from workflow](#) to the workflow history list

then Set [Workflow Output](#) to [value](#)

9. Type "This field was set by the Workflow Demo-WF" in the **value** text box.



- Click the **Publish** button in the **Workflows** tab toolbar to publish the workflow to our SharePoint site.



- Create a new item in the **Workflow Demo** list and start an instance of the **Workflow Demo-WF** on it.
  - Switch back to the browser window and click the **Workflow Demo** link in the sites **Quick Launch** menu.
  - Click the **new item** link inside the list.
  - Type "Item One" for the **Title** field and click the **Save** button.
  - Click the ellipsis button to the right of **Item One** and select **Workflows** from the drop-down.

This is just another way to add an action to a workflow. You could also use the **Workflow** tab's Action drop-down button like you did with the **Log to History List** action.

- Click the **Workflow Demo-WF** link on the **Workflows** page.  
**Start a New Workflow**



6. Click the **Start** button on the workflows initiation page.
4. Verify the workflow actions outcome.
  1. Verify the list now has a column titled **Workflow Demo-WF** and the **Item One** item's value for the column is **Completed**.
  2. Verify the **Workflow Output** column has the text we wrote to it through the workflow.

Title	Colors	Workflow Output	Workflow Demo-WF
Item One ✖	...	Red	This field was set by the Workflow Demo-WF <b>Completed</b>

3. Click the **Completed** link in the **Workflow Demo-WF** column.
4. Verify the **Workflow History** area has the output from our workflow action.

#### Workflow History

The workflow recorded these events.

<input type="checkbox"/> Date Occurred	Event Type	<input type="checkbox"/> User ID	Description
12/19/2012 6:08 AM	Comment	<input type="checkbox"/> System Account	Hello from workflow

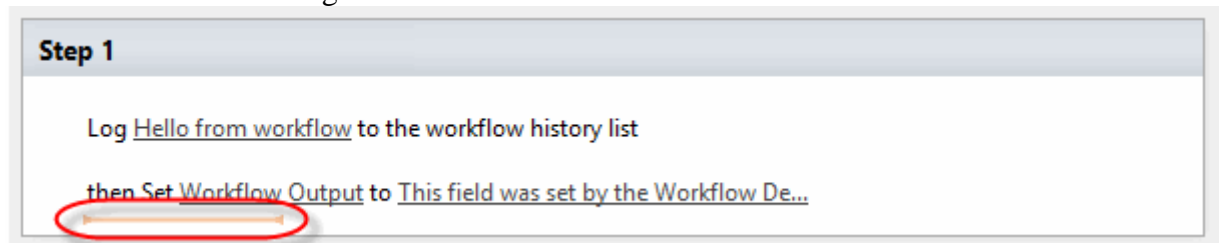
## Workflow Conditions

Workflow conditions are a way to control which Actions run or don't run within a workflow. Conditions provide workflows with If-Then and Else-If blocks to wrap Actions. SharePoint Designer provides the following conditions for use within custom workflows:

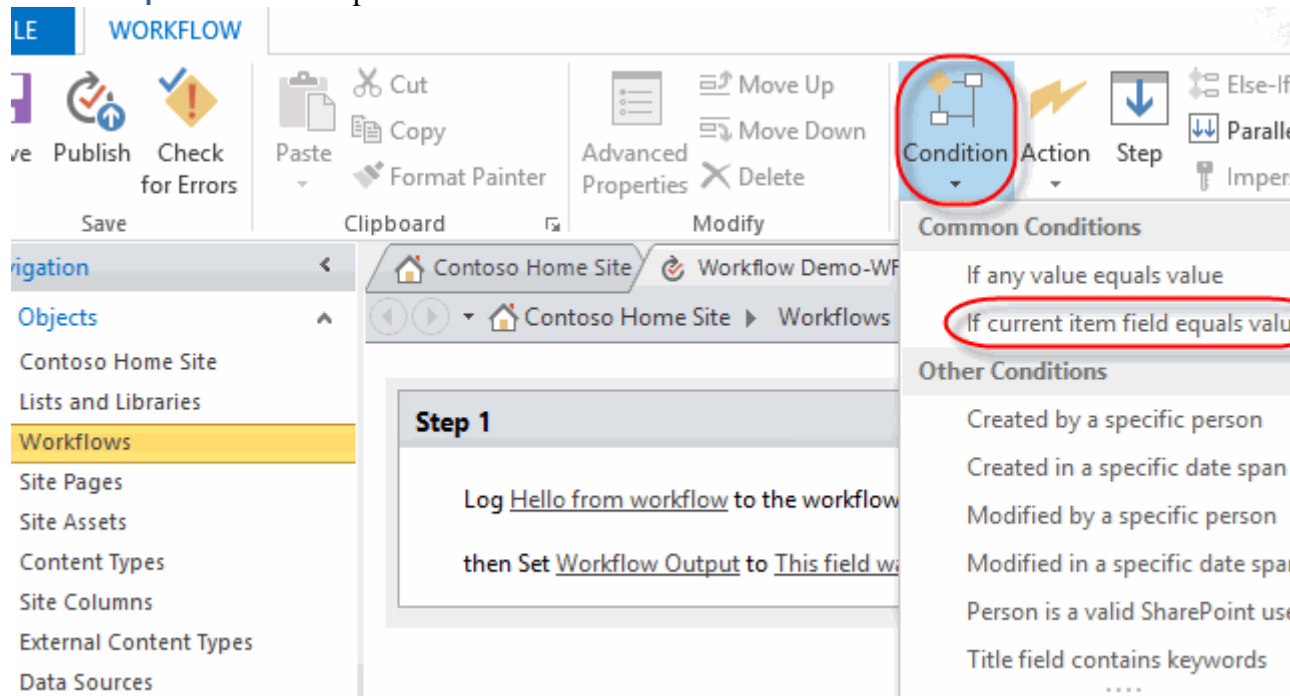
- **Common Conditions**
  - If any value equals value
  - If current item field equals value
- **Other Conditions**
  - Created by specific person
  - Created in a specific date span
  - Modified by a specific person
  - Modified in a specific date span
  - Person is a valid SharePoint user
  - Title field contains keywords

The following walk-through will show you how add a couple **If current item field equals value** conditions that will run different **Log to History List** actions based on valued within the **Colors** column of our **Workflow Demo** list. The conditions will be added into the **Workflow Demo-WF** that was created in the previous walk-through.

1. Add **If current item field equals value** conditions to check for the different color values within the **Colors** column of a **Workflow Demo** list item.
  1. Switch back to SharePoint Designer and the editor view of our **Workflow Demo-WF** workflow.
  2. Hover and click the orange bar below the last action.



3. Click the **Condition** drop-down button and choose the **If current item field equals value** option.



4. Click the **field** link in the condition and choose the **Colors** option from the drop-down list.

**Step 1**

Log Hello from workflow to the workflow history list

then Set Workflow Output to This field was set by the Workflow De...

If Current Item:Colors equals value

(Start typing or use the Insert group on the Ribbon.)

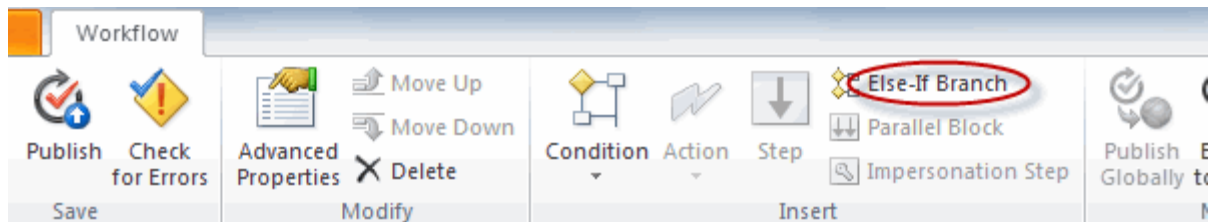
5. Click the **value** link and choose the **Red** option from the drop-down list.

If Current Item:Colors equals

(Start typing or use the Insert group on the Ribbon.)

Red  
Blue  
Green

6. Click the **Else-If Branch** button on the **Workflow** tab tool bar twice to add two more condition blocks to the workflow.



7. Click the orange bar below the **(Insert a condition)** label and type "If current" and press the Enter key to have the editor fill in the rest.

If Current Item:Colors equals Red

(Start typing or use the Insert group on the Ribbon.)

if current

Press Enter to insert If current item field equals value.

(Start typing or use the Insert group on the Ribbon.)

Else

(Start typing or use the Insert group on the Ribbon.)

8. Click the **field** link inside the **Else if** branch and choose the **Colors** field from the drop-down list.

If Current Item:Colors equals Red

(Start typing or use the Insert group on the Ribbon.)

Else if Current Item:Colors equals value

(Start typing or use the Insert group on the Ribbon.)

Else

(Start typing or use the Insert group on the Ribbon.)

9. Click the **value** link and choose the **Blue** color option from the drop-down list.
2. Add a **Log to History List** action inside each of the condition branches.
  1. Click the **(Start typing or use the Insert group in the Ribbon.)** label in the first condition branch and type "Log" in the text box and press the Enter key to have the editor fill in the rest of the action.

If Current Item:Colors equals Red

Log this message to the workflow history list

Else if Current Item:Colors equals Blue

(Start typing or use the Insert group on the Ribbon.)

Else

(Start typing or use the Insert group on the Ribbon.)

2. Click the **this message** link inside the **Log to History List** action and type "This items color choice was red" in the text-box field.

The screenshot shows a workflow configuration interface. At the top, there is a condition: "If Current Item:Colors equals Red". Below this, there is an action: "Log This items color choice was red to the workflow history list". The text "This items color choice was red" is circled in red. Below the action, there is an "Else if" condition: "Else if Current Item:Colors equals Blue". Below this, there is a text box with the placeholder "(Start typing or use the Insert group on the Ribbon.)". Below that, there is an "Else" condition, followed by another text box with the same placeholder.

3. Repeat the previous steps to add a **Log to History List** action inside the other two condition branches with messages reflecting "Blue" and "Green". The final condition branches should look like the following image:

The screenshot shows a workflow configuration interface with three condition branches. The first branch is "If Current Item:Colors equals Red" with the action "Log This items color choice was red to the workflow history list". The second branch is "Else if Current Item:Colors equals Blue" with the action "Log This items color choice was blue to the workflow history list". The third branch is "Else" with the action "Log This items color choice was green to the workflow history list". The text "This items color choice was blue" and "This items color choice was green" are circled in red.

3. Click the **Publish** link in the **Workflow** tab toolbar to update the SharePoint site with the current changes.
4. Test the condition branches in the **Workflow Demo** list.
  1. Switch back to the browser window and click the **Workflow Demo** link in the sites **Quick Launch** menu.
  2. Click the **Workflows** link from the item menu of **Item One**.
  3. Click the **Workflow Demo-WF** link under the **Start a New Workflow** heading.
  4. Click the **Start** button to start the workflow.
  5. Click the **Completed** link in the **Workflow Demo-WF** column for **Item One**.

6. Verify the **Workflow History** has an entry with a message appropriate for the items **Colors** field.

#### Workflow History

The workflow recorded these events.

<input type="checkbox"/> Date Occurred	Event Type	<input type="checkbox"/> User ID	Description
12/19/2012 7:09 AM	Comment	<input type="checkbox"/> System Account	Hello from workflow
<input type="checkbox"/> 12/19/2012 7:09 AM	Comment	<input type="checkbox"/> System Account	This items color choice was red

## Workflow Initiation Form

Initiation forms can be used with a SharePoint workflow to pass additional information into the workflow from the user who starts it. SharePoint Designer 2013 offers a wizard-driven interface for creating parameters and generating the Initiation form. The form that SharePoint Designer creates can be further customized with Microsoft InfoPath.

One drawback to using Initiation form parameters is that they work only if the workflow is manually started on an item. If a workflow is set to automatically start when an item is modified or created, then there is no opportunity for the user to interact with the Initiation form. The following shows the workflow settings and configuration tab in SharePoint designer with the

Start Options and Initiation form outlined:

**Information**

Information about this workflow.

Name: Workflow Demo-WF  
<click to enter text>

List: List Workflow  
Workflow Demo

Site: SharePoint 2010 Workflow

**Initiation**

Customization tools.

Workflow

Associated list

Task list

History list

**Settings**

General settings for this workflow.

Task List: Tasks

History List: Workflow History

☐ Show workflow visualization on status page

**Start Options**

Change the start options for this workflow.

☒ Allow this workflow to be manually started

☐ Require Manage List permissions

☐ Start workflow automatically when an item is created

☐ Start workflow automatically when an item is changed

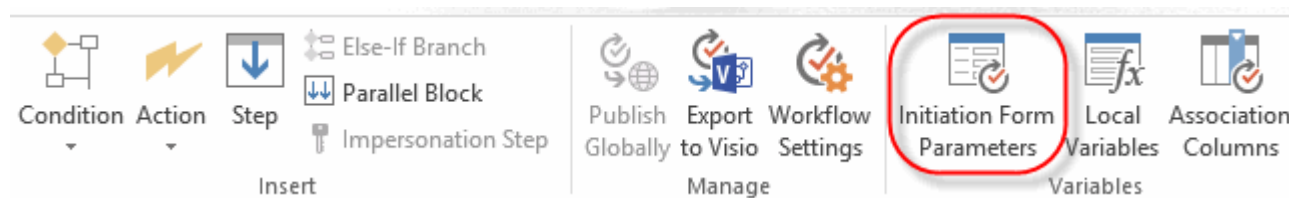
**Forms**

A list of the forms used by this workflow.

File Name	Type	Modified
Workflow Demo-WF.xsn	Initiation	12/19

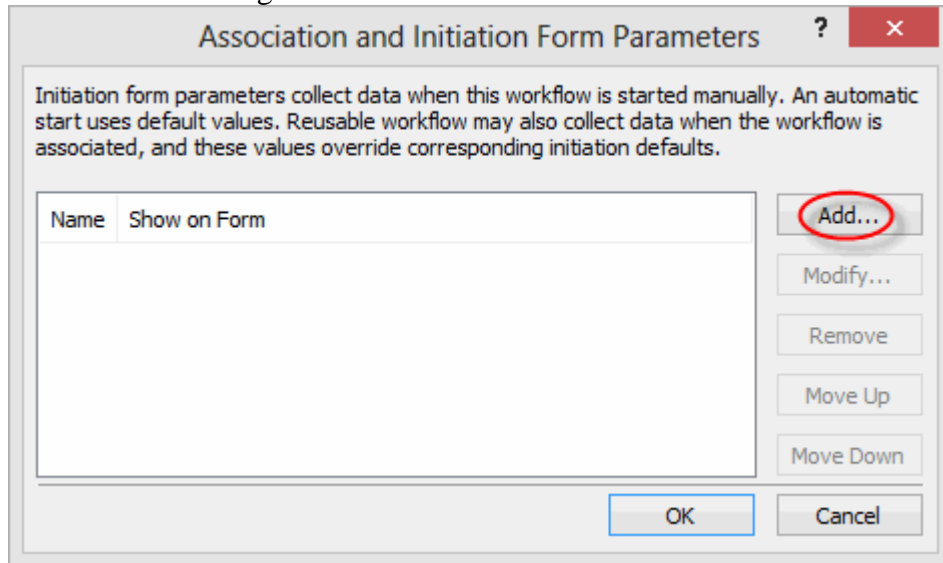
The following walk-through will show you how to add an Initiation parameter to the Workflow Demo-WF created in the previous walk-throughs in this lesson.

1. Add **Single line of text** parameter named "Input Data" to the **Workflow Demo-WF** using SharePoint Designer.
1. Switch back to SharePoint Designer and the editor view of our **Workflow Demo-WF** workflow.
2. Click the **Initiation Form Parameters** button on the **Workflow** tab toolbar.

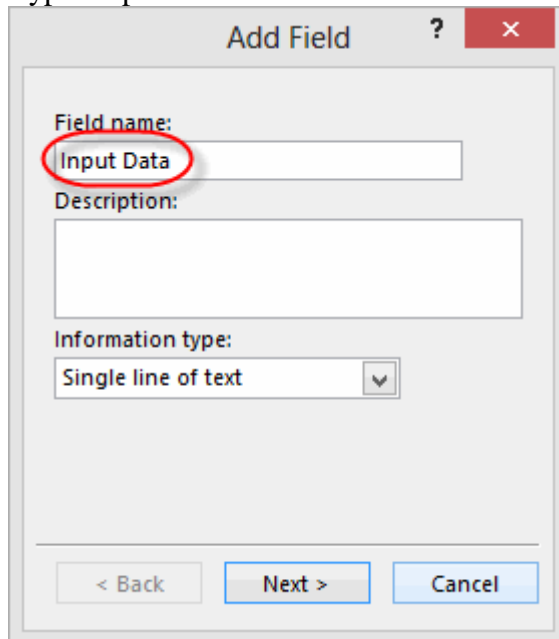




3. Click the **Add...** button on the **Association and Initiation Form Parameters** dialog window.

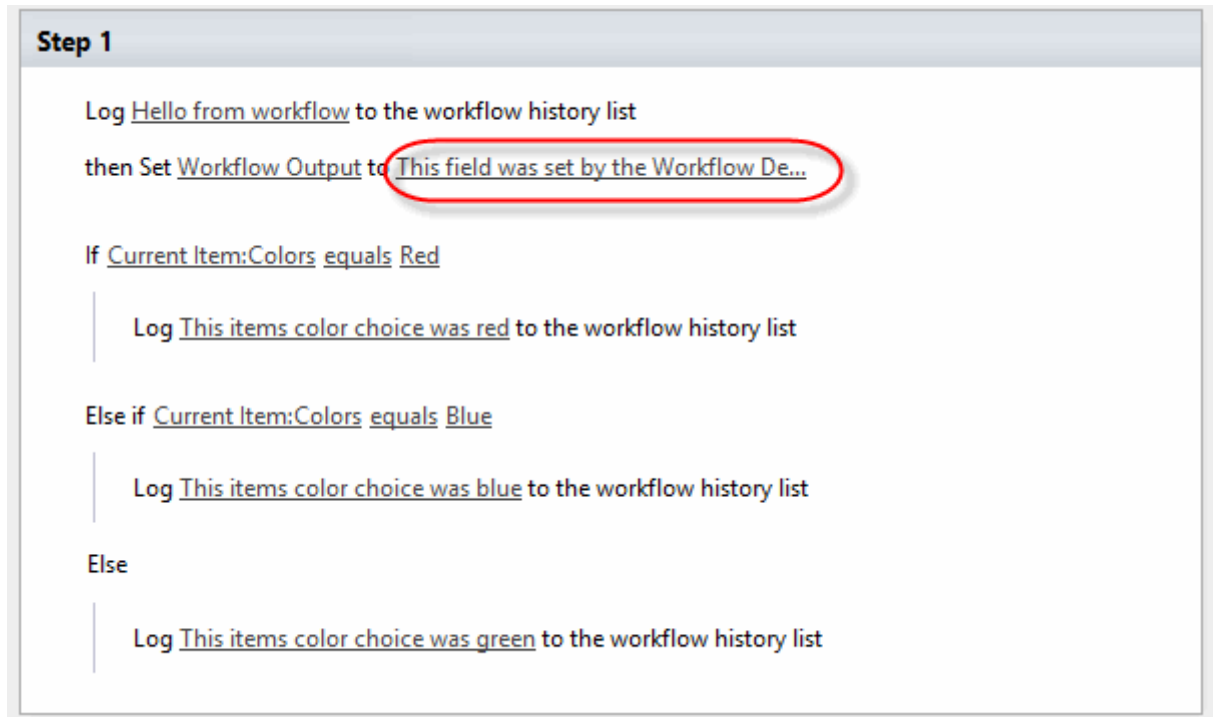


4. Type "Input Data" in the **Field name** field of the **Add Field** dialog window.



5. Click the **Next** button.
  6. Click the **Finish** button.
  7. Click the **OK** button on the **Association and Initiation Form Parameters** dialog window.
2. Modify the **Set Field in Current Item** workflow action to write the parameter information from the Initiation form into the **Workflow Output** field of the list item.

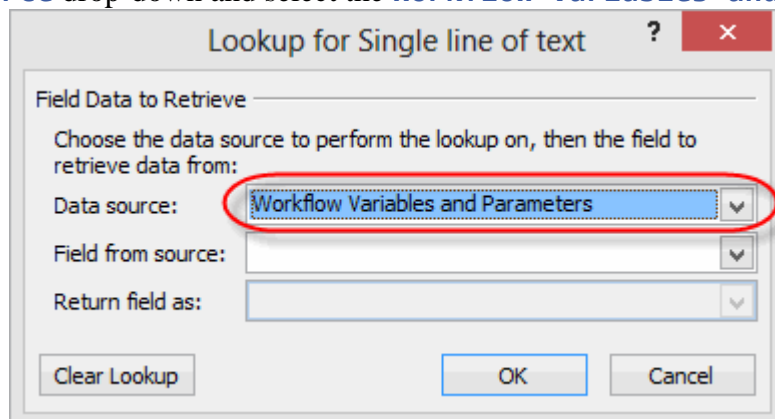
1. Click the **This field was set by the Workflow De...** link of the **Set Field in Current Item** action.



2. Click the **fx** button next to the text box to open the **Lookup for Single line of text** dialog window.

then Set Workflow Output to This field was set by the Workflow Demo: ... **fx**

3. Click the **Data source** drop-down and select the **Workflow Variables and Parameters**



**Parameters** option.

- Click the **Field from source** drop-down and select **Parameter: Input**

Lookup for Single line of text

Field Data to Retrieve

Choose the data source to perform the lookup on, then the field to retrieve data from:

Data source: Workflow Variables and Parameters

Field from source: **Parameter: Input Data**

Return field as: As String

Clear Lookup OK Cancel

**Data** option.

- Click the **OK** button to save the settings.
- Click the **Publish** button to save the workflow changes back to the SharePoint server.
- Run the **Workflow Demo-WF** to test the Initiation form parameter.
  - Switch back to the browser window and click the **Workflow Demo** link in the site's **Quick Launch** menu.
  - Click the **Workflows** link from the item menu of **Item One**.
  - Click the **Workflow Demo-WF** link under the **Start a New Workflow** heading.
  - Type "Hello from the initiation form!" in the **Input Data** field of the Initiation form.

Input Data

Hello from the initiation form!

Start Cancel

- Click the **Start** button to start the workflow.
- Verify the **Workflow Output** field for **Item One** has the text from the Initiation form.

Title	Colors	Workflow Output	Workflow Demo-WF
Item One ✱	...	Red	Completed

## Reusable Workflows

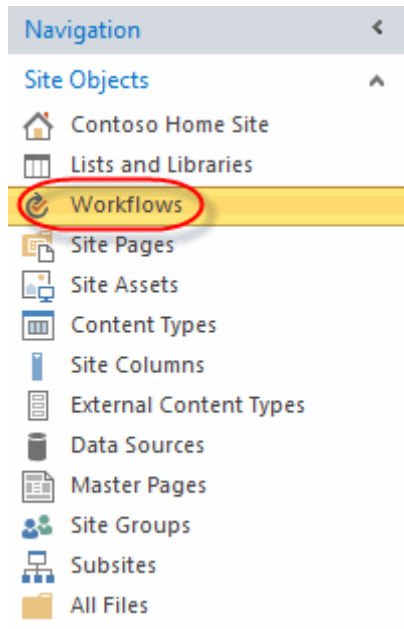
Reusable workflows allow you to create a workflow backed by a SharePoint Content Type instead of an existing list or library. Once the content type is assigned to a list or library, the

workflow can be associated with that same list or library. Unlike creating a List Workflow, a reusable workflow does require extra steps of associating the workflow with the list/library. The benefit is that the workflow can be used on as many lists/libraries that support the content type without having to re-create the workflow.

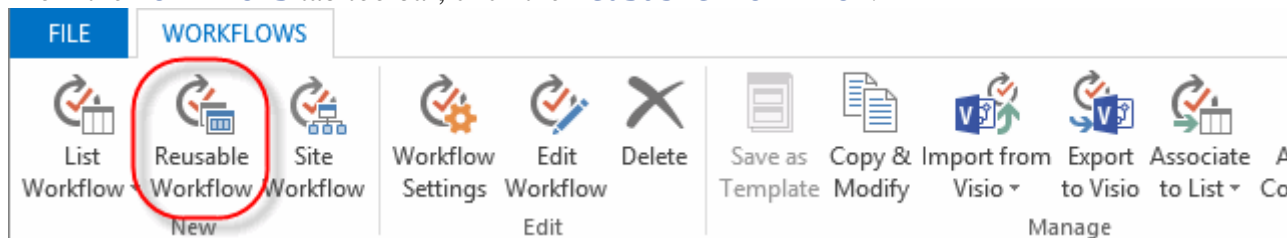
The following walk-through shows how to use SharePoint Designer 2010 to create a reusable workflow for the **Document** content type.

1. Launch SharePoint Designer 2010 and create a **Reusable Workflow** associated with the **Document** content type.

1. If SharePoint Designer is not already open, click the **Site Actions** menu and choose the **Edit in SharePoint Designer** option.
2. Click the **Workflows** link in the **Navigation** menu.



3. From the **Workflows** tab toolbar, click the **Reusable Workflow**.



4. Type "Reusable Demo-WF" in the **Name** field of the **Create Reusable Workflow** dialog window.

5. Select **Document** in the **Content Type** drop-down field of the **Create Reusable Workflow** dialog window.

**Create Reusable Workflow**

Add a new reusable workflow to your site

**Enter a name and description for your new workflow**

Name: Reusable Demo-WF

Description:

**Pick a base content type to limit this workflow to**

Content Type: Document

**Choose the platform to build your workflow on**

Platform Type: SharePoint 2010 Workflow

**i** The option for the SharePoint 2013 Workflow platform is not available because the workflow service is not configured on the server. Please contact your server administrator.

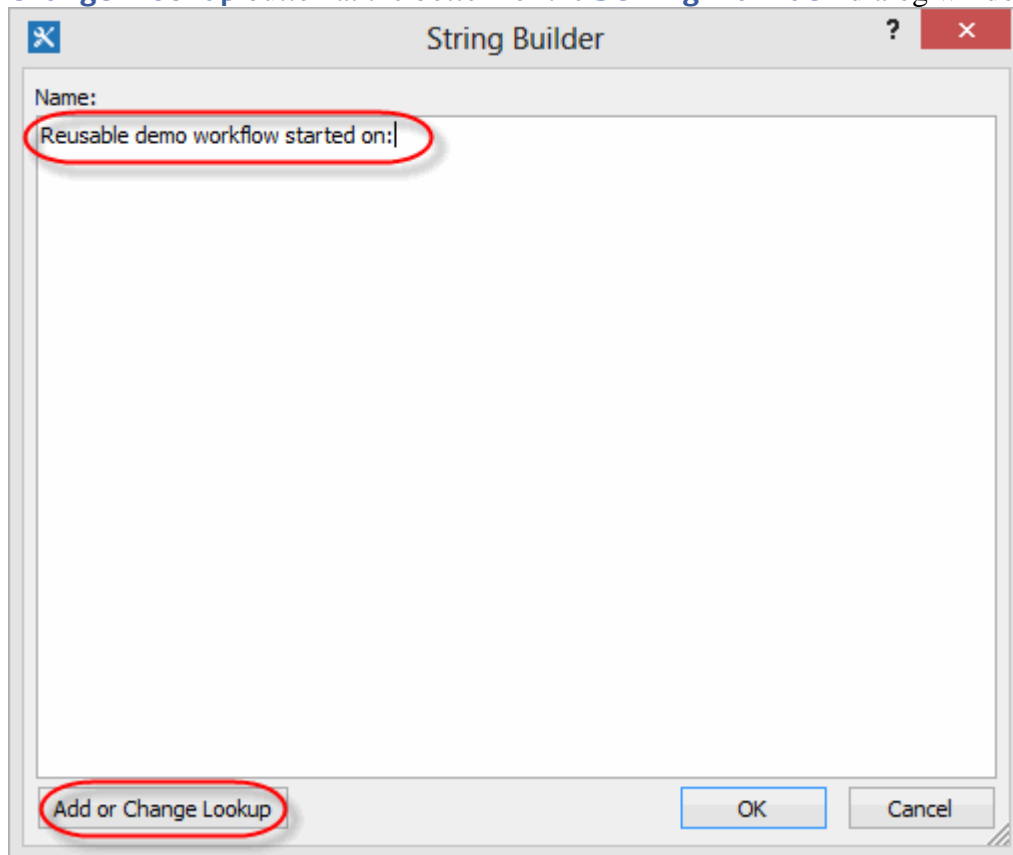
OK Cancel

6. Click the **OK** button to complete creating the new reusable workflow.
2. Add a **Log to History List** action to the **Reusable Demo-WF** workflow.
  1. Click the **Action** drop-down button on the **Workflow** tab toolbar and choose the **Log to History List** action.
  2. Click the **this message** link in the **Log to History List** action and click the ellipsis button to the right of the text box to open the **String Builder** dialog.

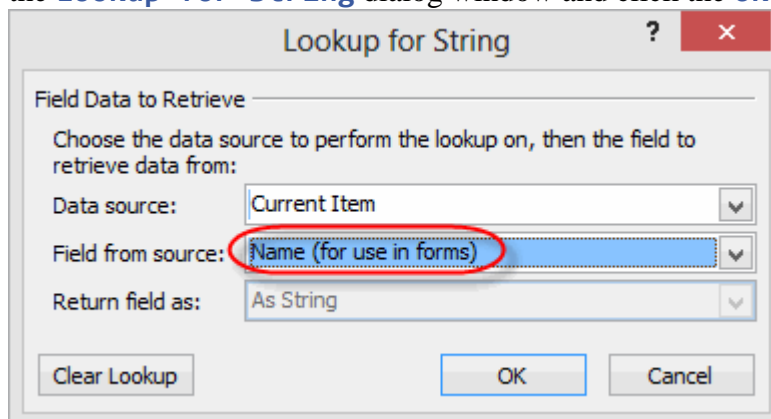
**Step 1**

Log  kflow history list

3. Type "Reusable demo workflow started on: " in the text box and click the **Add or Change Lookup** button at the bottom of the **String Builder** dialog window.



4. Select **Name (for use in forms)** for the **Field from source** field in the **Lookup for String** dialog window and click the **OK** button.



5. Click the **OK** button to close the **String Builder** dialog.
3. Click the **Publish** button in the **Workflow** tab toolbar to save and publish the new workflow to SharePoint.
4. Associate the **Reusable Demo-WF** with the **Documents** library.

1. Switch back to the browser window and click the **Documents** link in the sites **Quick Launch** menu.
2. Click the **Library Settings** button on the **LIBRARY** tab toolbar.
3. Click the **Advanced** settings link under the **General Settings** group.
4. Click the **Yes** radio button for the **Allow management of content**

#### Content Types

Specify whether to allow the management of content types on this document library. Each content type will appear on the new button and can have a unique set of columns, workflows and other behaviors.

Allow management of content types?

☒ Yes ☐ No

**types** option.

5. Click the **OK** button to save the setting.
6. Click the **Workflow Settings** link under the **Permissions and Management** area of the **Document Library Settings** page.

#### General Settings

#### Permissions and Management

#### Communications

- [List name, description and navigation](#)
- [Versioning settings](#)
- [Advanced settings](#)
- [Validation settings](#)
- [Column default value settings](#)
- [Rating settings](#)
- [Audience targeting settings](#)
- [Form settings](#)

- [Delete this document library](#)
- [Save document library as template](#)
- [Permissions for this document library](#)
- [Manage files which have no checked in version](#)
- [Workflow Settings](#)
- [Information management policy settings](#)
- [Enterprise Metadata and Keywords Settings](#)
- [Generate file plan report](#)

- [RSS settings](#)

7. Click the **Add a workflow** link.



Workflow Name (click to change settings)

Workflows in Progress

There are no workflows associated with this content type.

▪ [Add a workflow](#)

8. Select **Document** in the **Run on items of this type** drop-down list field.

**Content Type**

Select the type of items that will run the workflow. If the workflow that you want to add is a content type workflow, select the name of the content type.

Run on items of this type:

**Document** ▼

The type that you select filters the list of workflow templates.

9. Select **Reusable Demo-WF** in the **Select a workflow template** list-box

**Workflow**

Select a workflow to add to this content type. If a workflow is missing from the list, your site administrator may have to publish or activate it

Select a workflow template:

Collect Feedback - SharePoint 2010  
Collect Signatures - SharePoint 2010  
Disposition Approval  
**Reusable Demo-WF**

field.

10. Type "Shared Docs Reusable WF" in the **Name** field.

11. Check the box labeled **Creating a new item will start this workflow** in the **Start Options** group.

**Start Options**

Specify how this workflow can be started.

- ☒ Allow this workflow to be manually started by an authenticated user with Edit List Item permissions.  
☐ Require Manage Lists Permissions to start the workflow.  
☒ **Creating a new item will start this workflow.**  
☐ Changing an item will start this workflow.

12. Click the **OK** button to save.

5. Run the **Shared Docs Reusable WF** against an item in the **Documents** library.
1. Click the **Documents** link in the sites **Quick Launch** menu.
  2. Click the **new document** link to upload a new document to the library.
  3. Click the **Browse** button.
  4. Use the **Choose File to Upload** dialog to select the EvaluateSharePointServer2010-ITPro document from the class files you downloaded and click the **Open** button.
  5. Click the **OK** button on the **Upload Document** dialog.
  6. Type "Workflow Test" in the **Title** field and click the **Save** button to complete uploading the file.



- Click the **Completed** link under the **Shared Docs Reusable WF** column to open the workflow history page for item.
- Verify the **Workflow History** has the text entry from the **Log to History List** action with the file name included.

#### Workflow History

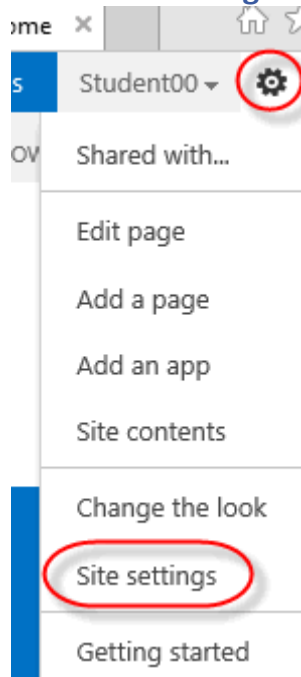
The workflow recorded these events.

<input type="checkbox"/> Date Occurred	Event Type	<input type="checkbox"/> User ID	Description
12/19/2012 9:59 AM	Comment	<input type="checkbox"/> System Account	Reusable demo workflow started on:EvaluateSharePointServer2010-ITPro.docx

## Creating Custom List Workflows

Duration: 15 to 25 minutes.

- Navigate to your team site.
  - Import the Time-off-request-list-template.stp list template file and create a new list using the template. The new list will be used later in the exercise with a custom workflow.
- Click the **Settings** menu then click the **Site Settings** option.



- Click the **List templates** link on the **Site Settings** page within the **Web Designer Galleries** group.

Web Designer Galleries

[Site columns](#)

[Site content types](#)

[Web parts](#)

[List templates](#)

[Master pages](#)

[Solutions](#)

[Themes](#)

[Composed looks](#)

Site Actions

[Manage site features](#)

[Save site as template](#)

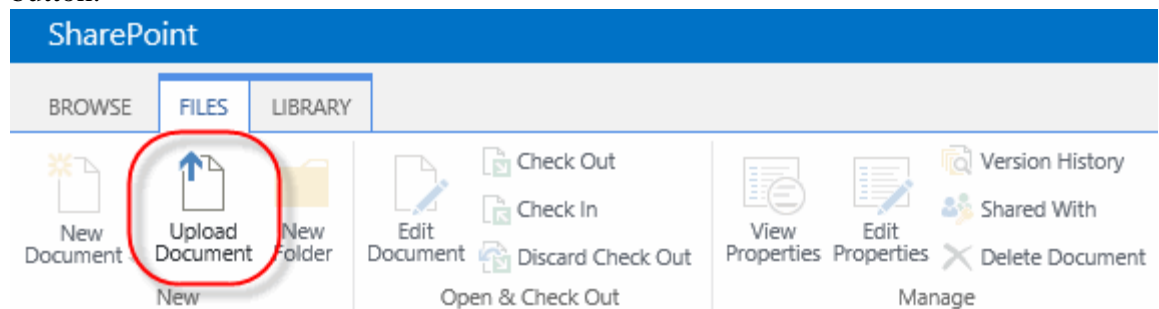
[Enable search configuration export](#)

[Reset to site definition](#)

[Delete this site](#)

Site Administration

- Click the **FILES** tab to open the toolbar then click the **Upload Document** link button.



- Click the **Browse** button in the **Upload Template** dialog.
- Navigate to the folder you downloaded the class files to and select the Time-off-request-list-template.stp file and click the **Open** button on the **Choose File to Upload** dialog window.
- Click the **OK** button on the **Add a template** dialog.

Add a template

✕

Choose a file

C:\WebucatorClasses\SharePoint\ClassFiles\SharePoint

Browse...

[Upload files using Windows Explorer instead](#)

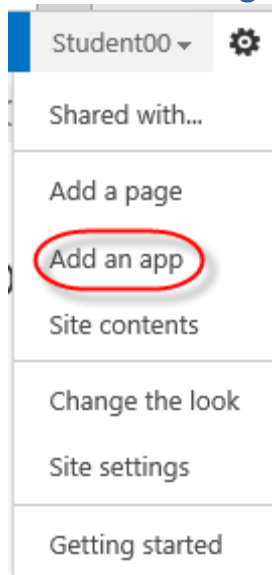
☒ Overwrite existing files

OK

Cancel

- Click the **Save** button on the **List Template Gallery** dialog to save the file into the gallery.

8. Click the **Settings** menu then choose the **Add an app** option.

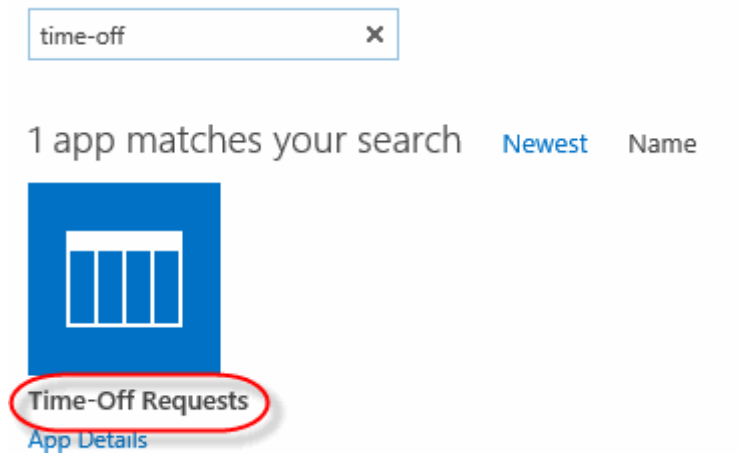


9. Type "time-off" in the **search** field and click the **search** icon.

## Site Contents ▸ Your Apps



10. Select the **Time-Off Requests** template from the list template.



11. Type "Time-Off Requests" in the **Name:** field and click the **Create** button to complete creating the new list.

## Adding Custom List

Pick a name

You can add this app multiple times to your site. Give it a unique name.

Name:

Time-Off Requests

[Advanced Options](#)

Create

Cancel

12. Click the **Time-Off Requests** link in the **Quick Launch** and verify the new list has the following columns: **Name**, **Start Date**, **End Date**, **Reason**, **Manager**, and **Manager Feedback**.

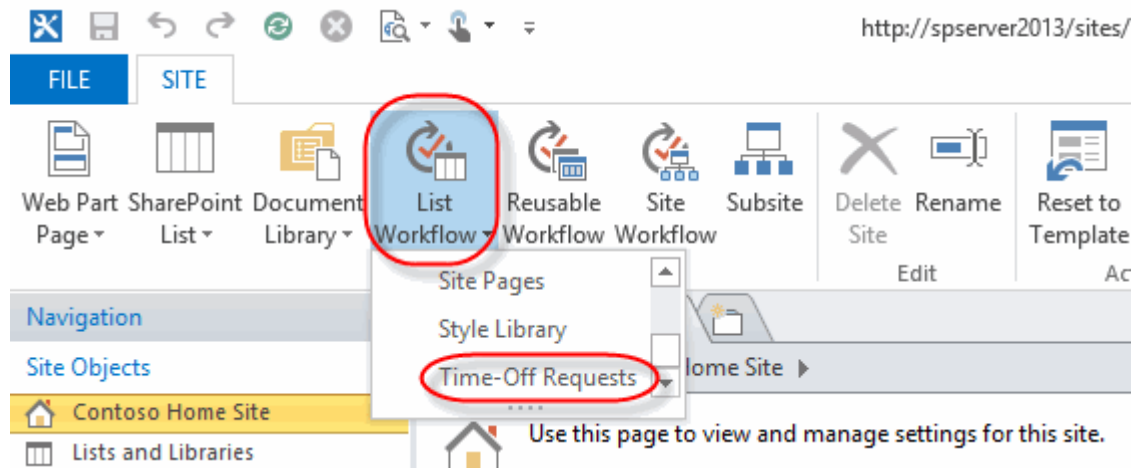
The columns were defined in the list template that the list was created with. If the list does not have these columns, make sure the list was created with the template imported in the earlier steps.

✓  Name Start Date End Date Reason Manager Manager Feedback

There are no items to show in this view of the "Time-Off Requests" list.

3. Open the site in SharePoint Designer 2013.
4. Using SharePoint Designer, create a new **List Workflow** for the **Time-Off Requests** list.

1. Click the **List Workflow** drop-down button on the **Site** tab toolbar within the **New** group and select **Time-Off Requests** from the list.

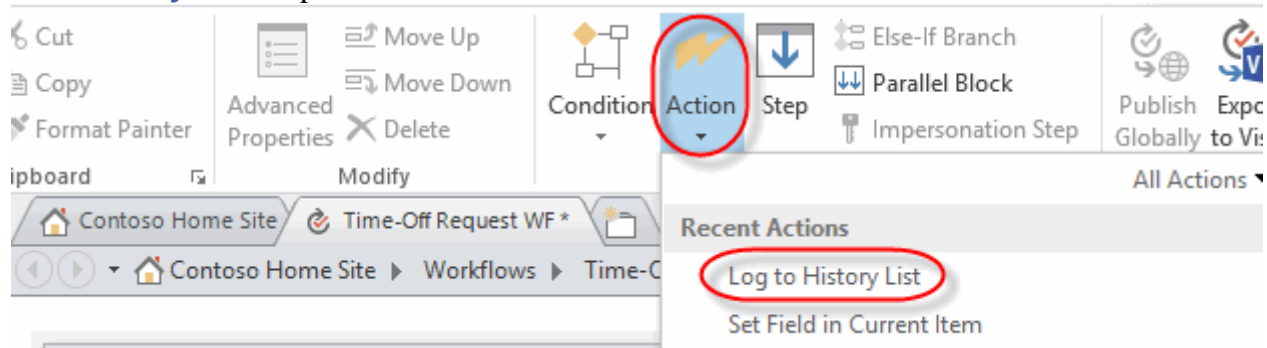


2. Type "Time-Off Request WF" in the **Name** field of the **Create List Workflow** dialog window and click the **OK** button to finish creating it.

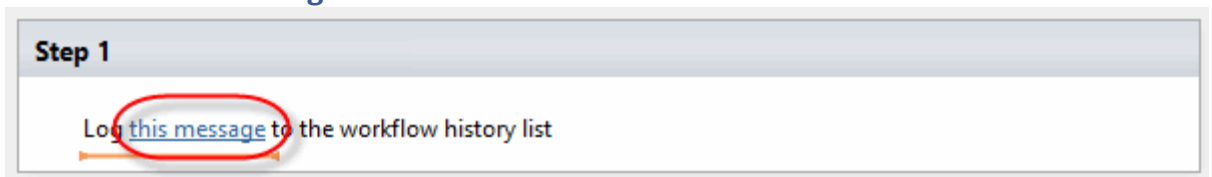
A screenshot of the 'Create List Workflow - Time-Off Requests' dialog box. The title bar says 'Create List Workflow - Time-Off Requests'. Inside, there's a section 'Add a new workflow to your list' with a calendar icon. Below it, a grey bar says 'Enter a name and description for your new workflow'. The 'Name:' label is followed by a text box containing 'Time-Off Request WF', which is circled in red. The 'Description:' label is followed by an empty text box. Below that, another grey bar says 'Choose the platform to build your workflow on'. The 'Platform Type:' label is followed by a dropdown menu showing 'SharePoint 2010 Workflow'. At the bottom, there's an information icon and a message: 'The option for the SharePoint 2013 Workflow platform is not available because the workflow service is not configured on the server. Please contact your server administrator.' The bottom right has 'OK' and 'Cancel' buttons.

5. Add a **Log to History List** action to the new workflow.

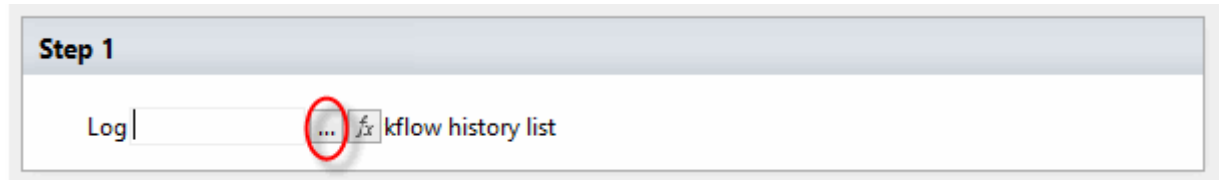
1. Click the **Action** drop-down button in the **Workflow** tab toolbar and select the **Log to History List** option.



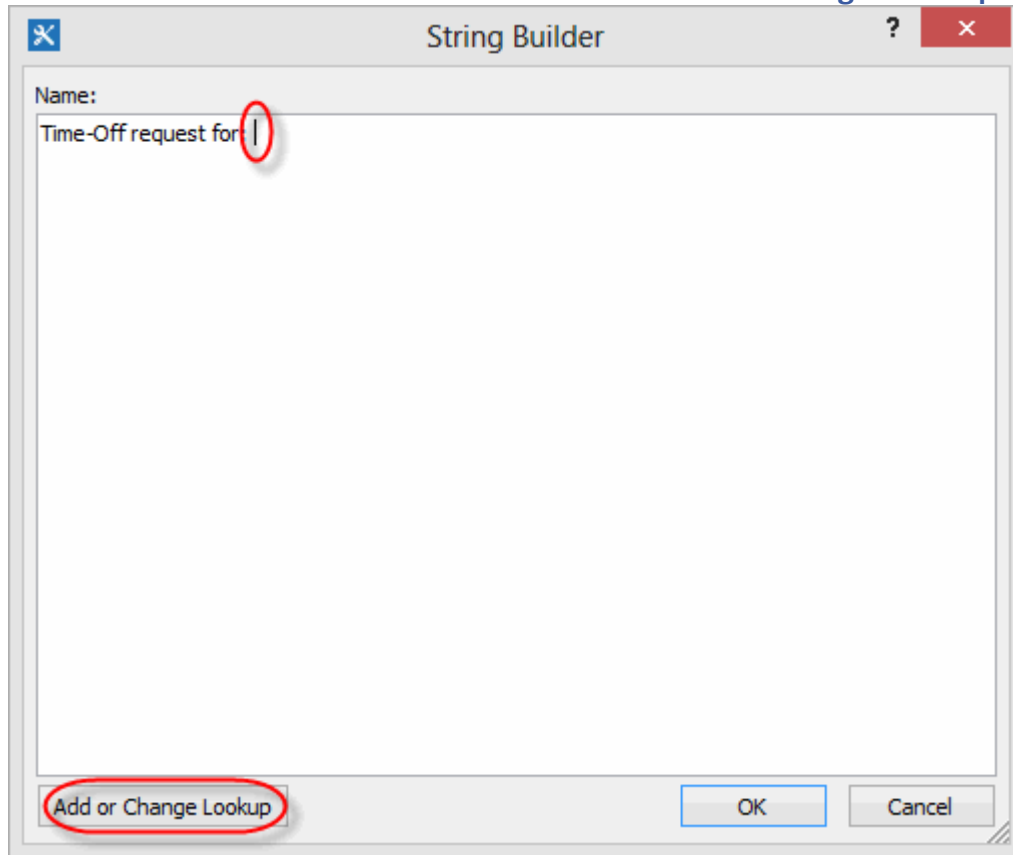
2. Click the **this message** link within the workflow editor work area.



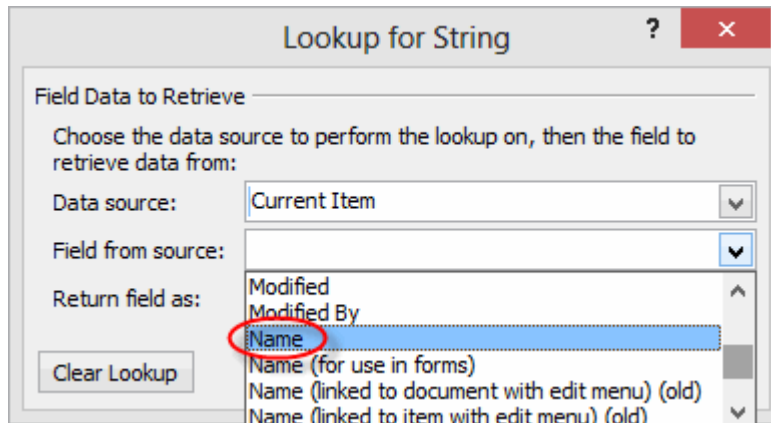
3. Click the ellipsis button next to the log message text box to open the **String Builder** editor.



4. Type "Time-Off request started for:" in the **Name** field then with you insertion point at the end of the line after the colon and click the **Add or Change Lookup** button.

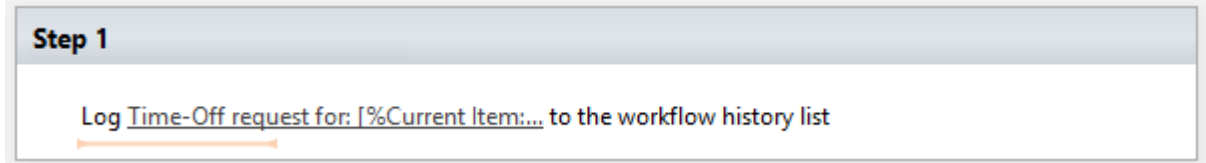


5. In the **Lookup for String** dialog box, leave the **Data source** field set to **Current Item** and select **Name** in the **Field from source** drop-down field.

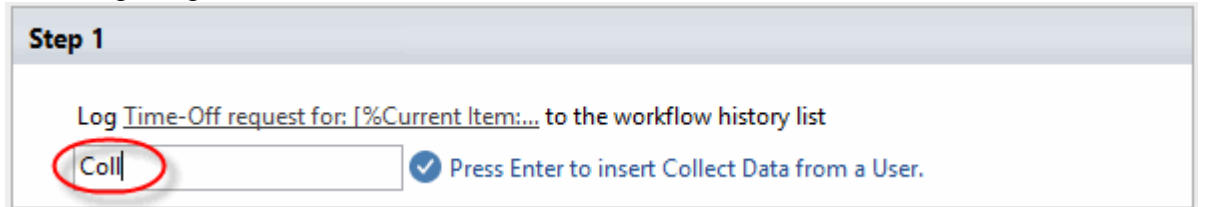


6. Click the **OK** button on the **Lookup for String** dialog to close and save your choices.
  7. Click the **OK** button on the **String Builder** dialog to close it and save the string.
6. Add an action that will collect data from a user using a custom task.

1. Hover your mouse pointer under the **Log to History List** action you created in the previous steps and click on the orange bar that appears.

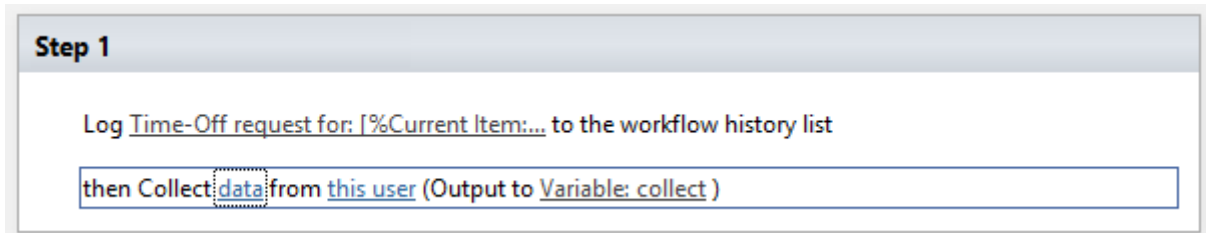


2. Type the word "collect" and the orange bar will change into a text box like the following image:



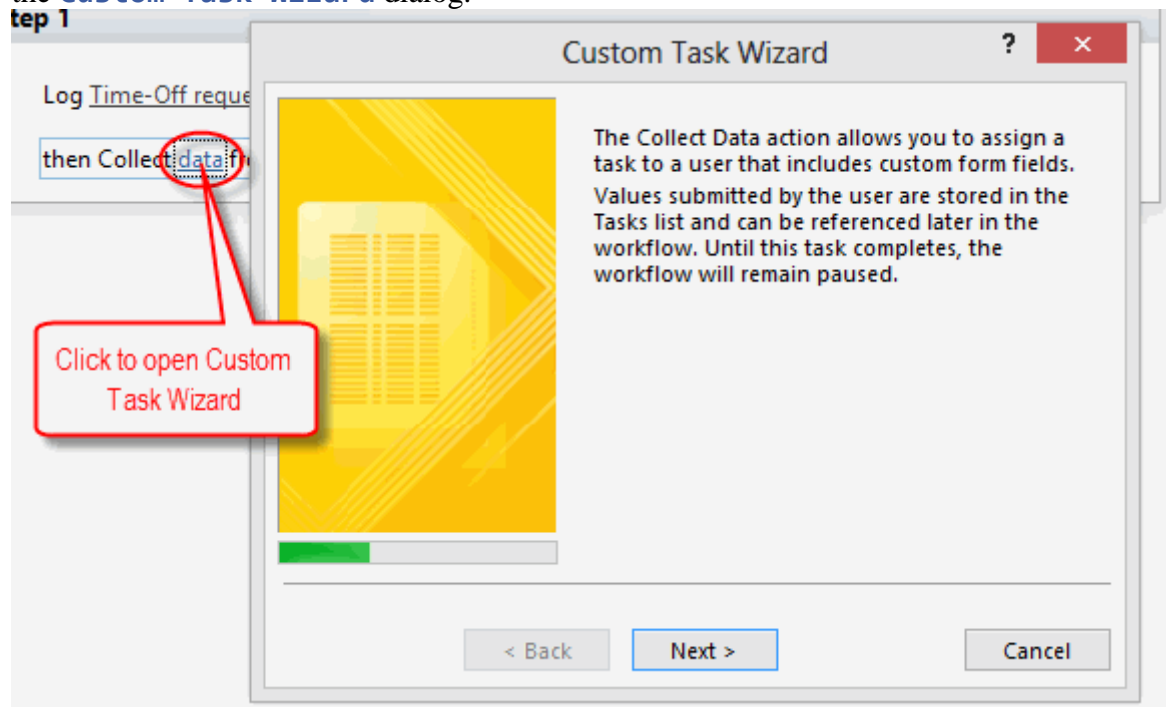
This is just another way to add an action to a workflow. You could also use the **Workflow** tab's **Action** drop-down button like you did with the **Log to History List** action.

3. Press your Enter key to have the editor add the **Collect Data from a User** action.

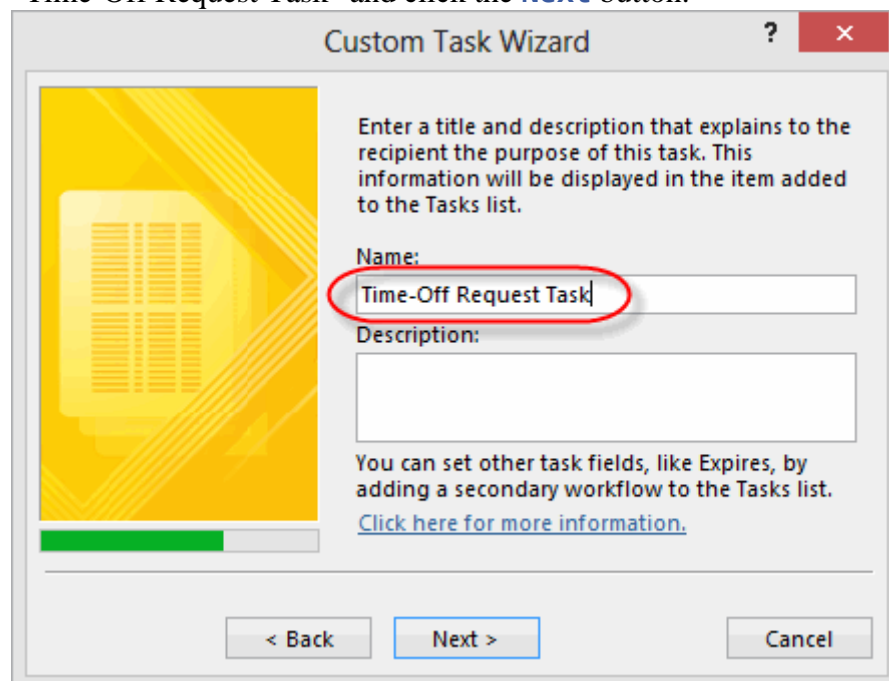




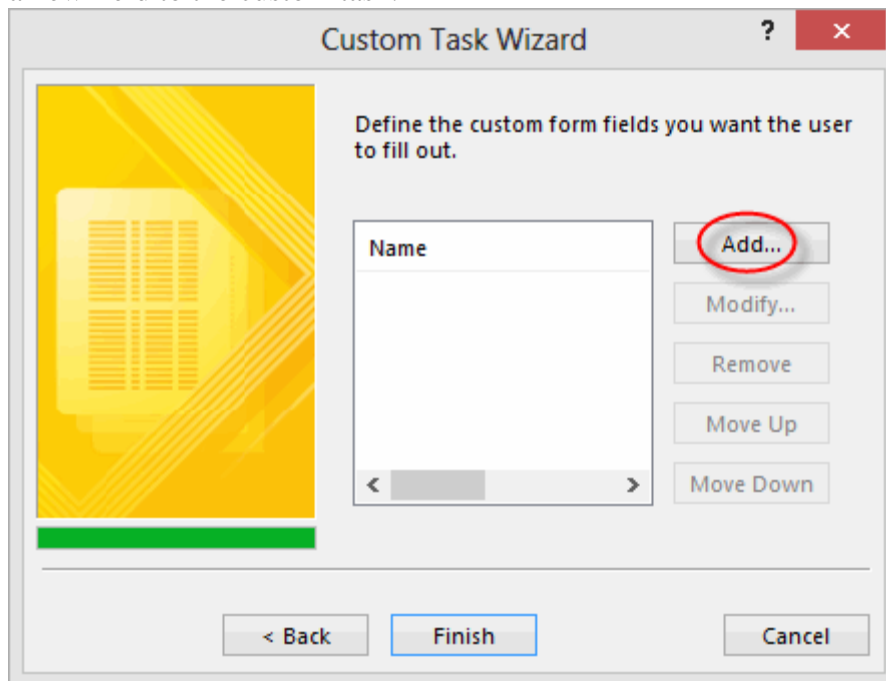
- Click the data link in the **Collect Data from a User** action to open the **Custom Task Wizard** dialog.



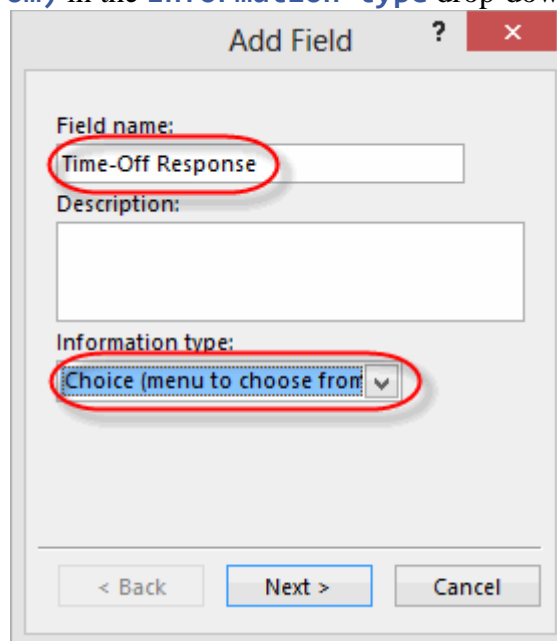
- Click the **Next** button on the first page of the **Custom Task Wizard** dialog.
- On the second page of the **Custom Task Wizard** dialog, change the **Name** field to "Time-Off Request Task" and click the **Next** button.



7. On the third page of the **Custom Task Wizard** dialog, click the **Add** button to add a new field to the custom task.

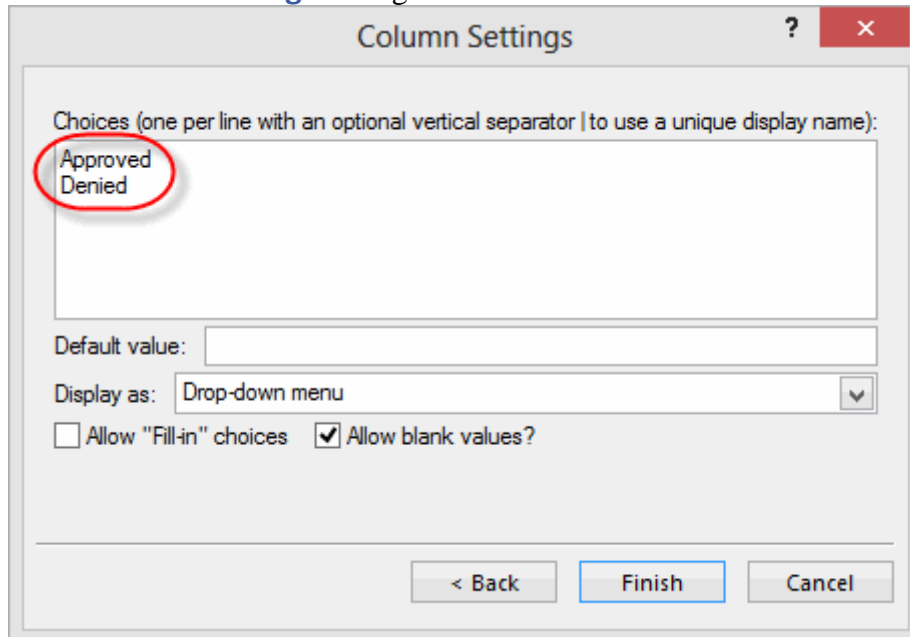


8. Type "Time-Off Response" in the **Field name** field and choose **Choice (menu to choose from)** in the **Information type** drop-down field and click

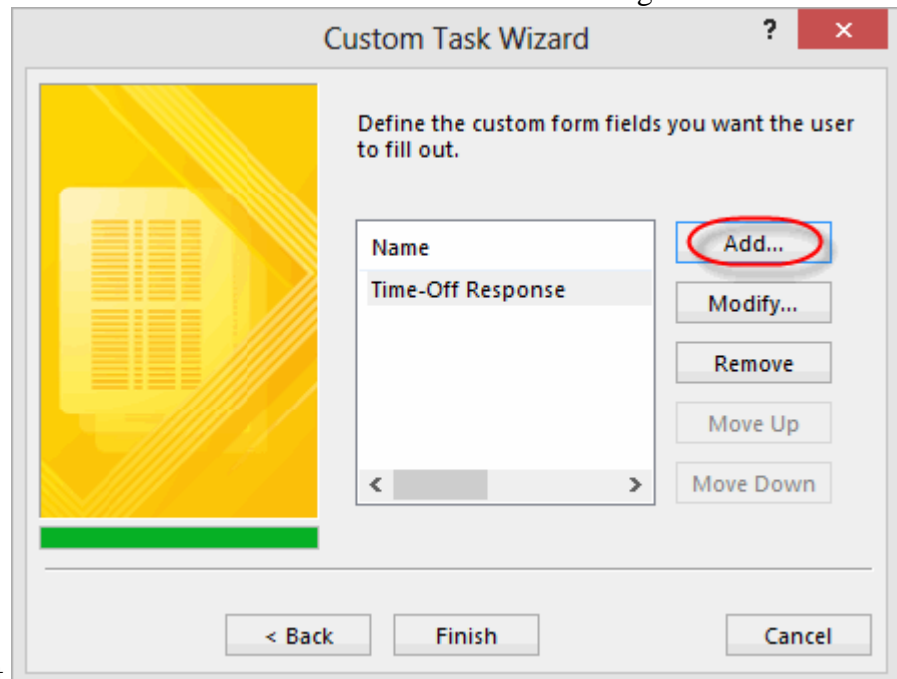


the **Next** button.

9. Type "Approved" and "Denied" on separate lines in the **Choices** field of the **Column Settings** dialog and click the **Finish** button.

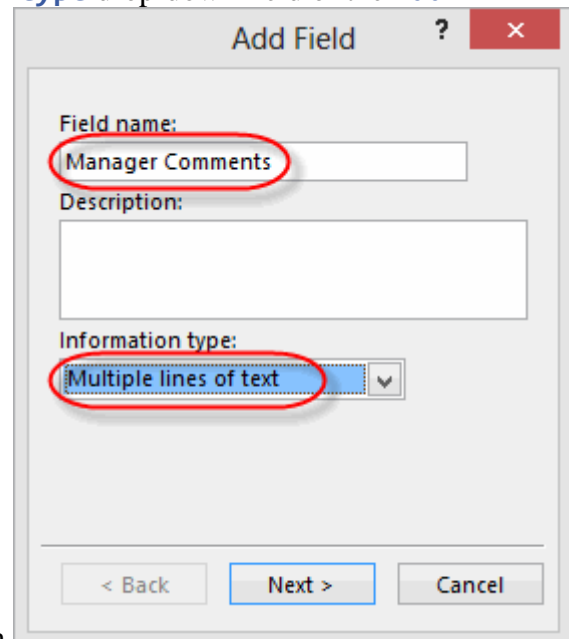
The image shows the 'Column Settings' dialog box. At the top, the title bar says 'Column Settings' with a question mark and a close button. Below the title bar, there is a text area labeled 'Choices (one per line with an optional vertical separator | to use a unique display name):'. Inside this text area, the words 'Approved' and 'Denied' are entered on two separate lines. A red circle is drawn around the text 'Approved'. Below the text area, there is a 'Default value:' label followed by an empty text box. Below that is a 'Display as:' label followed by a dropdown menu currently set to 'Drop-down menu'. At the bottom of the dialog, there are two checkboxes: 'Allow "Fill-in" choices' which is unchecked, and 'Allow blank values?' which is checked. At the very bottom, there are three buttons: '< Back', 'Finish', and 'Cancel'. The 'Finish' button is highlighted with a blue border.

10. Click the **Add** button back on the **Custom Task Wizard** dialog to add a second

The image shows the 'Custom Task Wizard' dialog box. The title bar says 'Custom Task Wizard' with a question mark and a close button. On the left side, there is a large yellow graphic with a grid pattern. On the right side, there is a text area labeled 'Define the custom form fields you want the user to fill out.' Below this text area, there is a list box containing the text 'Time-Off Response'. To the right of the list box, there are five buttons: 'Add...', 'Modify...', 'Remove', 'Move Up', and 'Move Down'. The 'Add...' button is circled in red. At the bottom of the dialog, there are three buttons: '< Back', 'Finish', and 'Cancel'.

field to the list.

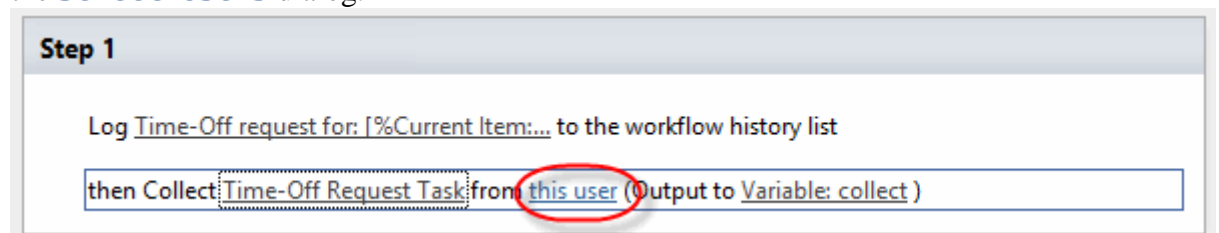
11. Type "Manager Comments" in the **Field name** field and choose **Multiple lines of text** in the **Information type** drop-down field of the **Add**



The screenshot shows the 'Add Field' dialog box. The 'Field name' field is populated with 'Manager Comments'. The 'Information type' dropdown menu is open, showing 'Multiple lines of text' as the selected option. Both the text input and the dropdown are highlighted with red circles. The dialog includes a 'Description' text area and navigation buttons: '< Back', 'Next >', and 'Cancel'.

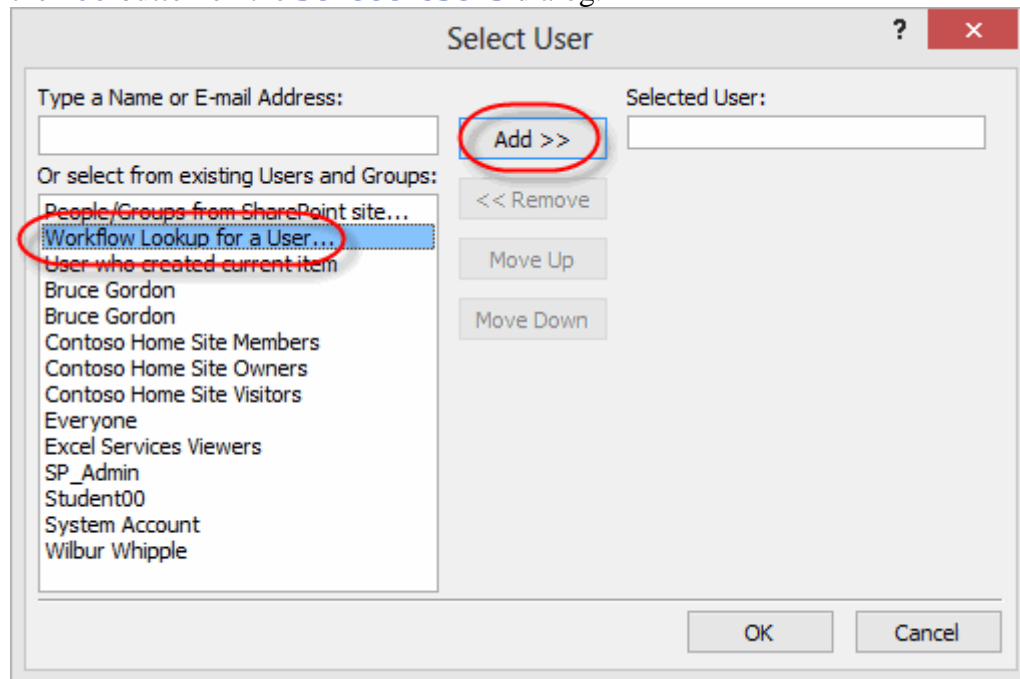
**Field** dialog and click the **Next** button.

12. Leave the **Default value** field blank and click the **Finish** button on the **Column Settings** dialog.
13. Click the **Finish** button on **Custom Task Wizard** dialog to save the custom task.
14. Click the **this user** link in the **Collect Data from a User** action to open the **Select Users** dialog.

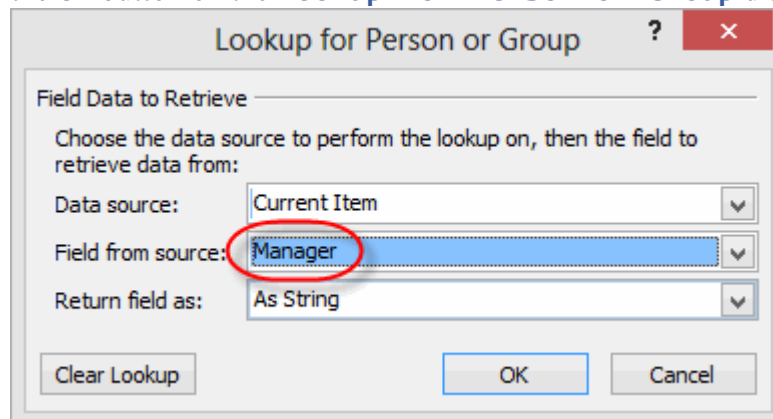


The screenshot displays the 'Step 1' configuration window. The workflow step is defined as 'Log Time-Off request for: [%Current Item:... to the workflow history list' followed by 'then Collect: Time-Off Request Task from: this user (Output to Variable: collect)'. The 'this user' link is highlighted with a red circle.

15. Select **Workflow Lookup for a User...** option within the list box and click the **Add** button on the **Select Users** dialog.

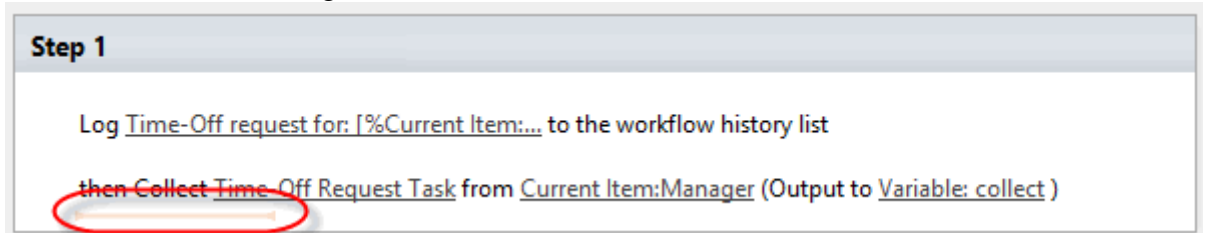


16. Select **Manager** in the **Field from source** drop-down list field and click the **OK** button on the **Lookup for Person or Group** dialog.

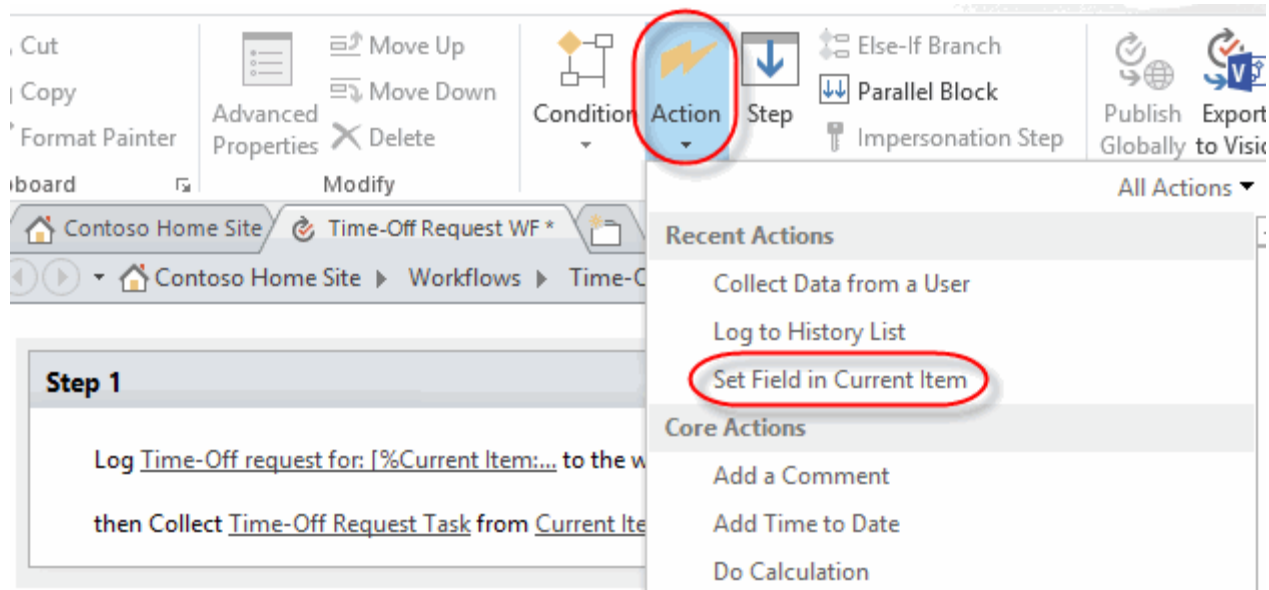


17. Click the **OK** button to close and save your choice on the **Select Users** dialog.
7. Add an action that will retrieve the **Manager Comments** from the previous task action into the **Manager Feedback** field of the list item.

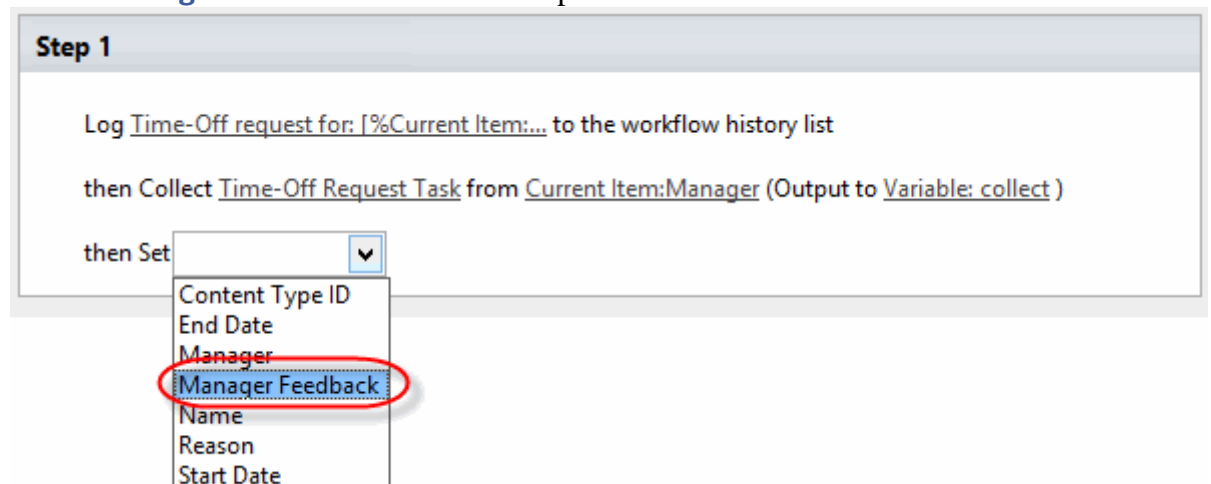
1. Hover and click the orange bar below **Collect Data from a User** action.



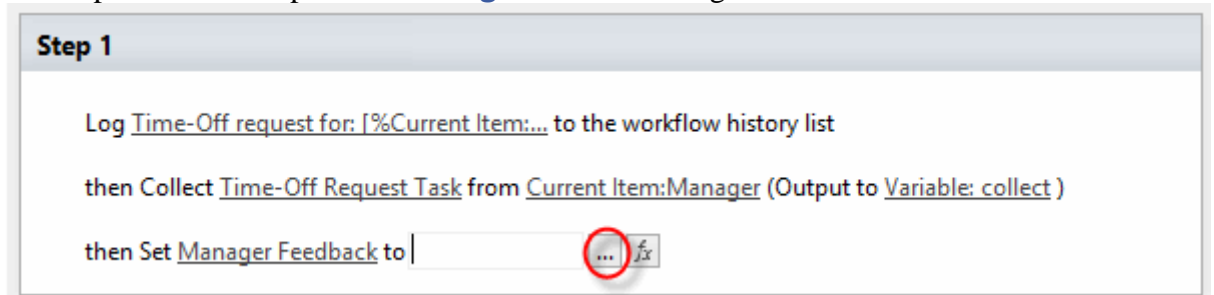
2. Click the **Action** button drop-down in the **Workflow** tab toolbar and choose the **Set Field in Current Item** action from the list.



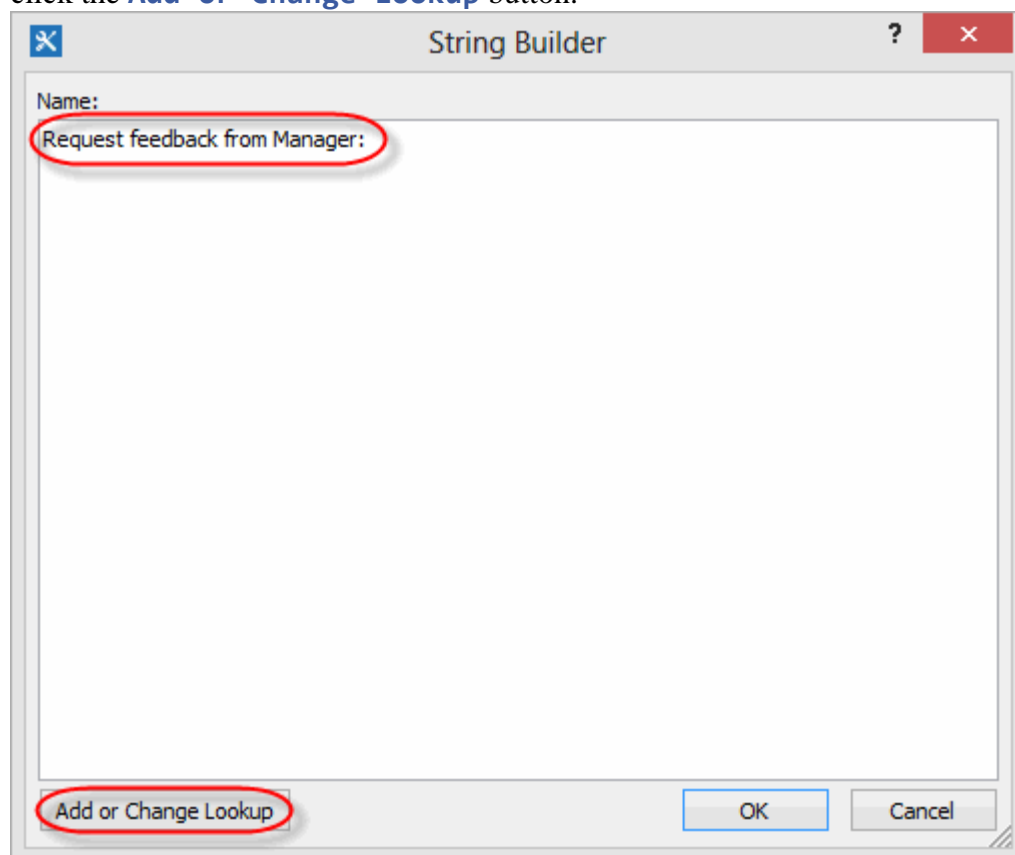
3. Click the field link in the **Set Field in Current Item** action and choose **Manager Feedback** from the drop-down list.



- Click the **value** link in the **Set Field in Current Item** action and then click the ellipsis button to open the **String Builder** dialog.



- Type "Request feedback from Manager: " in the **String Builder** field and then click the **Add or Change Lookup** button.



6. Select **Association: Task List** from the **Data** source drop-down field.

Lookup for String

Field Data to Retrieve

Choose the data source to perform the lookup on, then the field to retrieve data from:

Data source: Current Item

Field from source: Current Item, Workflow Variables and Parameters, Workflow Context, Association: History List, Association: Task List, Current List

Return field as:

Clear Lookup

7. Select **ID** from the **Field** drop-down field.

Lookup for String

Field Data to Retrieve

Choose the data source to perform the lookup on, then the field to retrieve data from:

Data source: Association: Task List

Field from source: Has Custom E-mail Body, ID, Is Current Version, Item Child Count, Item Type, Level

Return field as:

Find the List Item

Choose a field from the selected list and a matching value that identifies the specific item you want from the data source:

Field: ID

Value:

Clear Lookup

8. Click the **fx** button next to the **Value** field text box.

Find the List Item

Choose a field from the selected list and a matching value that identifies the specific item you want from the data source:

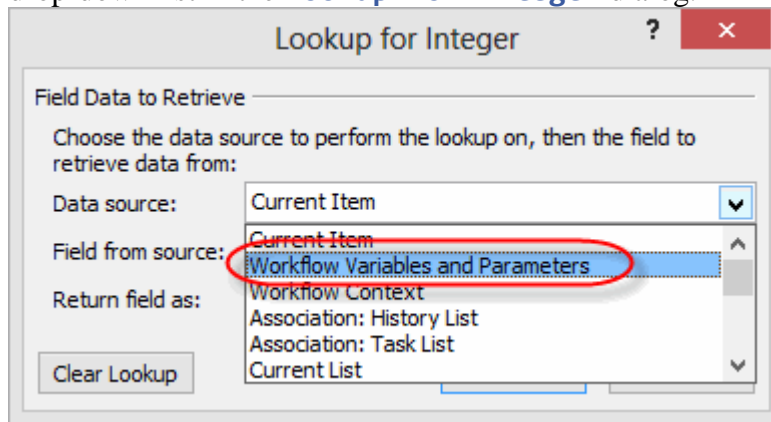
Field: ID

Value: fx

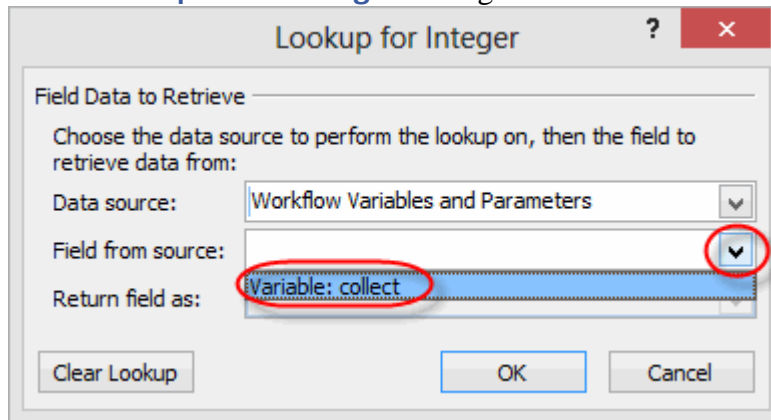
Clear Lookup OK Cancel



9. Select **Workflow Variables and Parameters** from the **Data source** field drop-down list in the **Lookup for Integer** dialog.

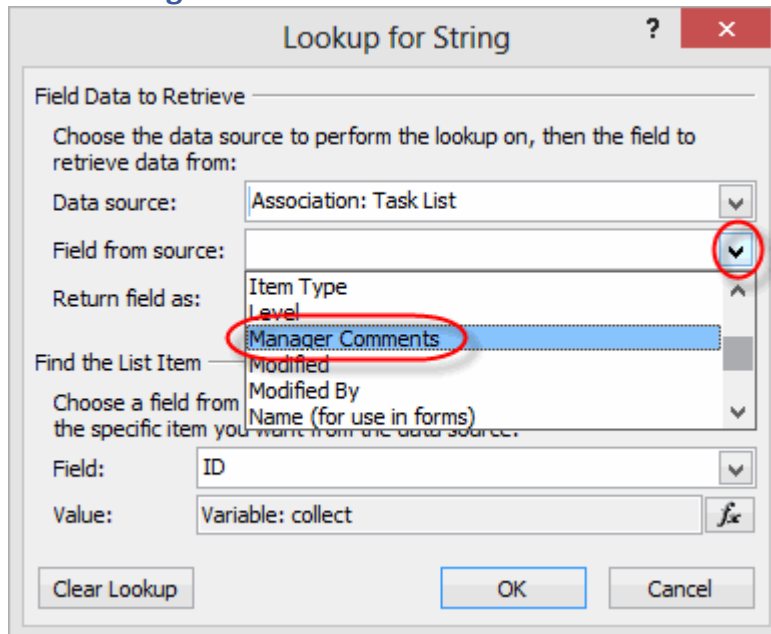


10. Select **Variable: collect** from the **Field from source** field drop-down list in the **Lookup for Integer** dialog.



11. Click the **OK** button to save your choices and close the **Lookup for Integer** dialog.

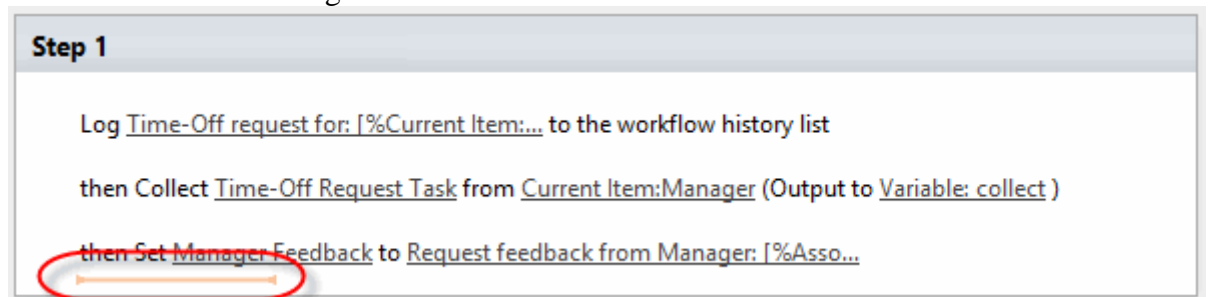
12. Select **Manager Comments** from the **Field from source** field drop-down list.



The screenshot shows the 'Lookup for String' dialog box. The 'Field from source' dropdown is open, showing a list of fields including 'Manager Comments', which is highlighted with a red circle. The 'Data source' is set to 'Association: Task List'. The 'Return field as' dropdown is also open, showing 'Level' and 'Manager Comments' (highlighted with a red circle). The 'Find the List Item' section is visible, with 'Field' set to 'ID' and 'Value' set to 'Variable: collect'.

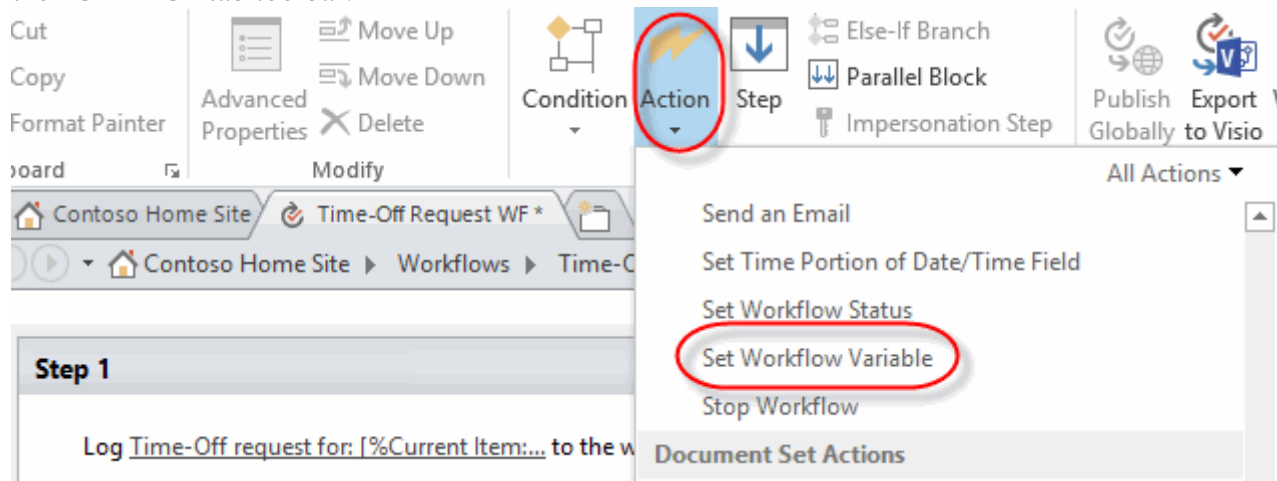
The **Manager Comments** custom task field will not show in the list until you've completed the **Find the List Item** portion of the **Lookup for String** dialog. The **Find the List Item** portion is how the workflow retrieves the specific task that was created by previous workflow action.

13. Click the **OK** button to close the **Lookup for String** dialog and save your settings.
14. Click the **OK** button to close the **String Builder** dialog and save your string.
8. Add a **Set Workflow Variable** action that store the **Time-Off Response** of the custom task action created in previous steps. The workflow variable will be used in later steps with a condition to send different emails based on the Manager's response in the custom task.
  1. Hover and click the orange bar below **Set Field in Current Item** action.

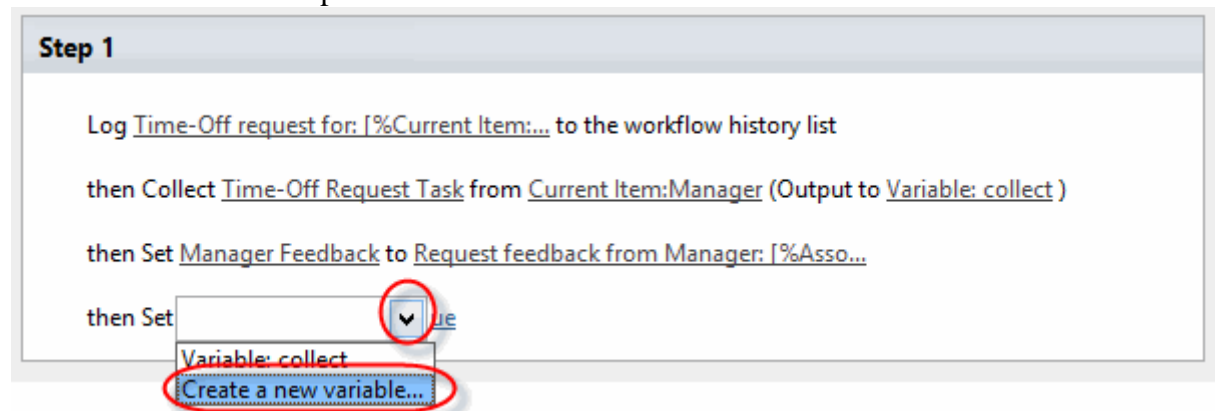


The screenshot shows the 'Step 1' section of a workflow. It contains three actions: 'Log Time-Off request for: [%Current Item:... to the workflow history list', 'then Collect Time-Off Request Task from Current Item:Manager (Output to Variable: collect)', and 'then Set Manager Feedback to Request feedback from Manager: [%Asso...'. The last action is highlighted with a red circle.

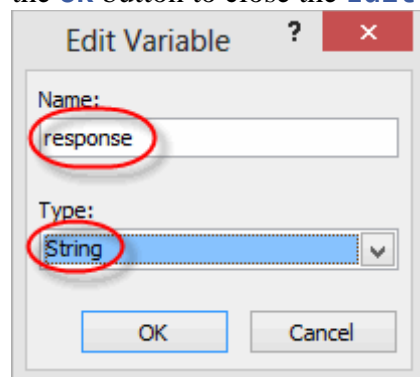
2. Select **Set Workflow Variable** from the **Action** drop-down list in the **Workflow** tab toolbar.



3. Click the **workflow variable** link in the new action and select **Create a new variable** from the drop-down list.



4. Type "Response" in the **Name** field and select **String** in the **Type** field and click the **OK** button to close the **Edit Variable** dialog and save your settings.



5. Click the **Value** link of the **Set Workflow Variable** action.

**Step 1**

Log Time-Off request for: [%Current Item:...] to the workflow history list

then Collect Time-Off Request Task from Current Item:Manager (Output to Variable: collect )

then Set Manager Feedback to Request feedback from Manager: [%Asso...

then Set Variable: response to **value**

6. Click the **fx** button next to the **Value** field text box.

**Step 1**

Log Time-Off request for: [%Current Item:...] to the workflow history list

then Collect Time-Off Request Task from Current Item:Manager (Output to Variable: collect )

then Set Manager Feedback to Request feedback from Manager: [%Asso...

then Set Variable: response to  **fx**

7. Select **Association: Task List** from the **Data** source drop-down field.

**Lookup for String** ? x

Field Data to Retrieve —

Choose the data source to perform the lookup on, then the field to retrieve data from:

Data source:  **fx**

Field from source:

Return field as:

8. Select **ID** from the **Field** drop-down field.

Lookup for String

Field Data to Retrieve

Choose the data source to perform the lookup on, then the field to retrieve data from:

Data source: Association: Task List

Field from source:

Return field as:

Find the List Item

Choose a field from the selected list and a matching value that identifies the specific item you want from the data source:

Field: ID

Value:

Form\_URN  
GUID  
Has Custom E-mail Body  
ID  
Is Current Version  
Item Child Count

Clear Lookup

9. Click the **fx** button next to the **Value** field text box.

Find the List Item

Choose a field from the selected list and a matching value that identifies the specific item you want from the data source:

Field: ID

Value:

fx

Clear Lookup

OK

Cancel

10. Select **Workflow Variables and Parameters** from the **Data source** field drop-down list in the **Lookup for Integer** dialog.

Lookup for Integer

Field Data to Retrieve

Choose the data source to perform the lookup on, then the field to retrieve data from:

Data source: Current Item

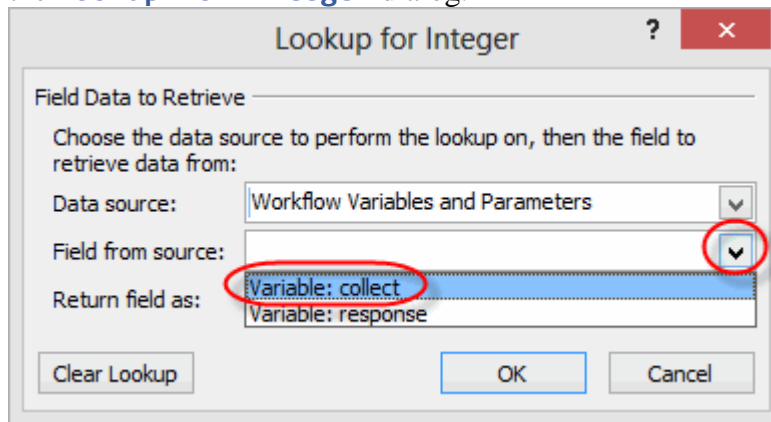
Field from source: Current Item

Return field as: Workflow Context

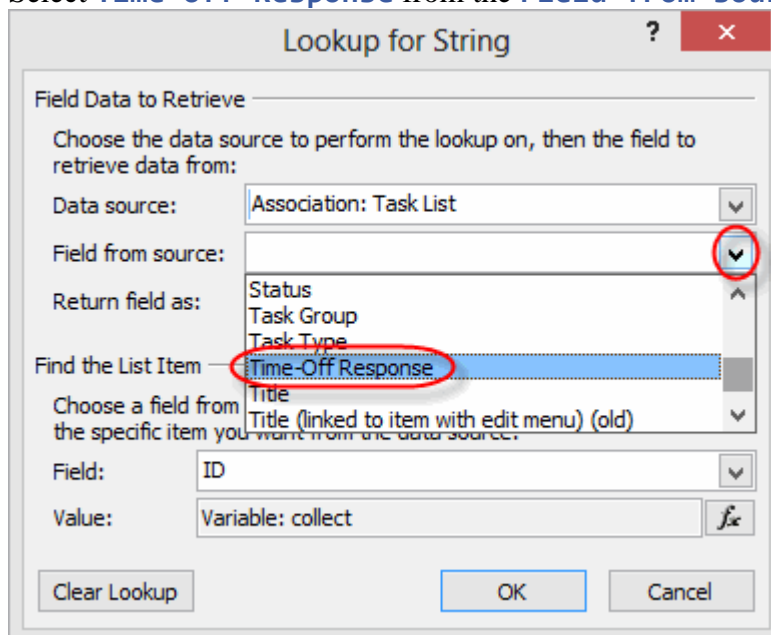
Association: History List  
Association: Task List  
Current List

Clear Lookup

11. Select **Variable: collect** from the **Field** from source field drop-down list in the **Lookup for Integer** dialog.



12. Click the **OK** button to save your choices and close the **Lookup for Integer** dialog.
13. Select **Time-Off Response** from the **Field** from source field drop-down list.

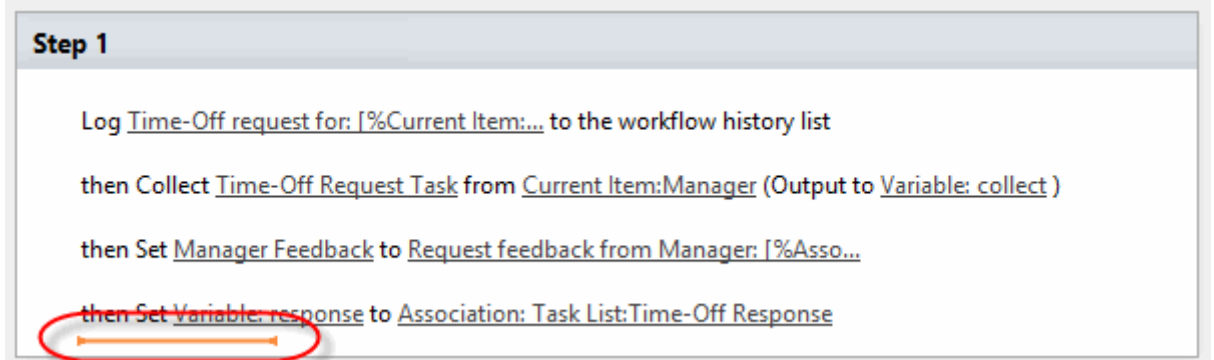


The **Time-Off Response** custom task field will not show in the list until you've completed the **Find the List Item** portion of the **Lookup for String** dialog. The **Find the List Item** portion is how the workflow retrieves the specific task that was created by previous workflow action.

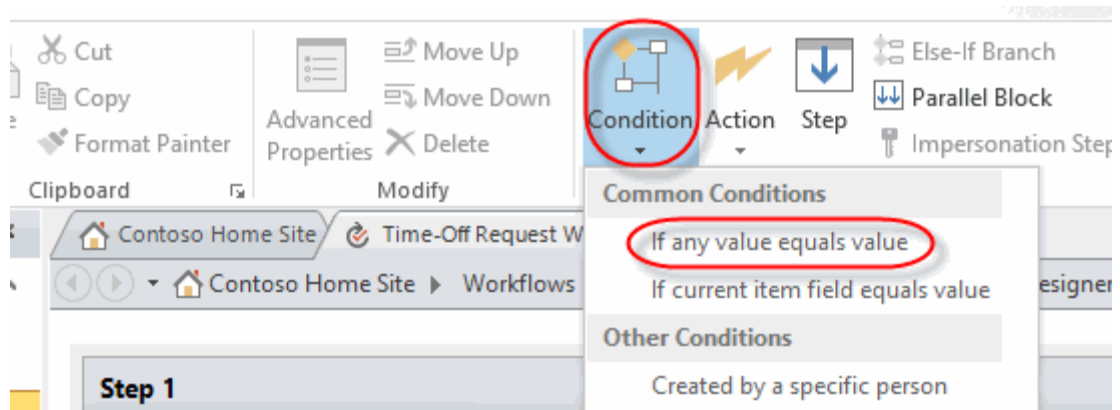
14. Click the **OK** button to close the **Lookup for String** dialog and save your settings.

9. Add an **If any value equals value** condition to the workflow.

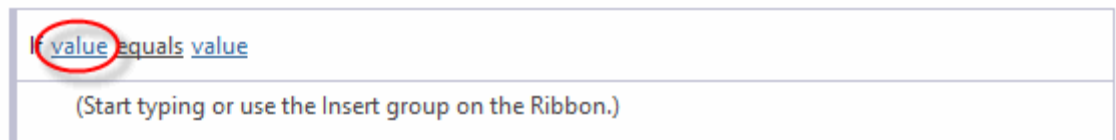
1. Hover and click the orange bar below the last action in the workflow.



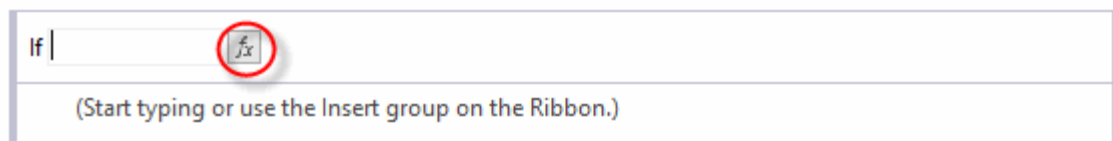
2. Select **If any value equals value** option from the **Condition** drop-down button in the **Workflow** tab toolbar.



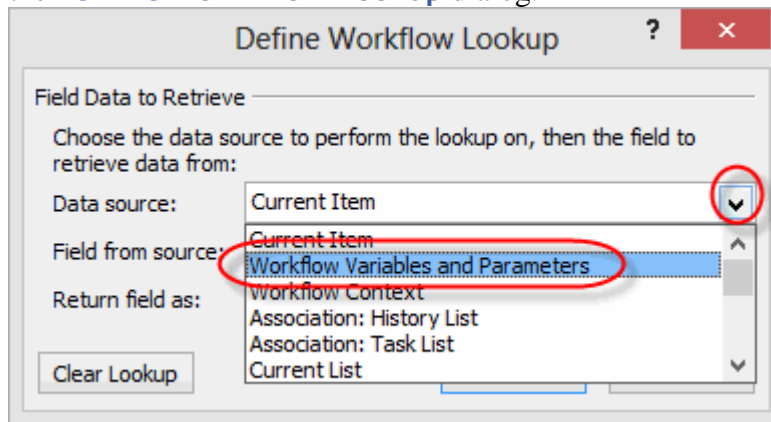
3. Click the **value** link in the workflow condition.



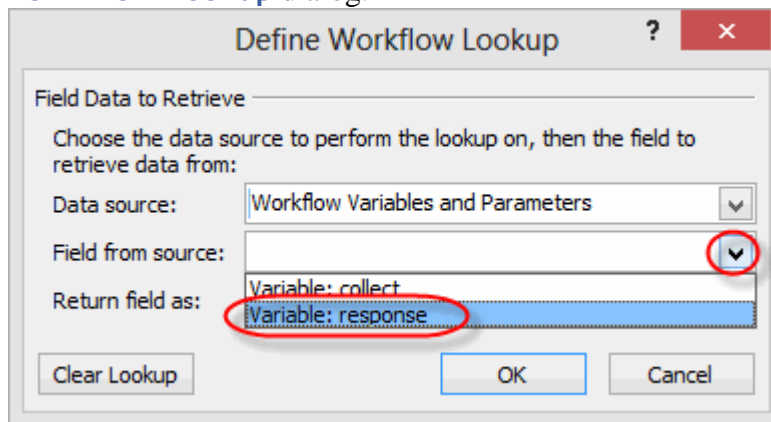
4. Click the **fx** button next to the **value** text box.



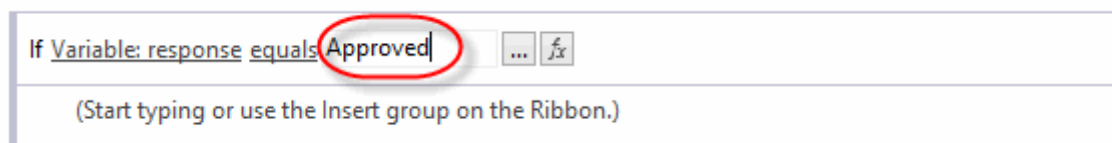
5. Select **Workflow Variables and Parameters** for the **Data source** field of the **Define Workflow Lookup** dialog.



6. Select **Variable: response** for the **Field from source** field of the **Define Workflow Lookup** dialog.



7. Click the **OK** button to close the **Define Workflow Lookup** and save your settings.
8. Click the **value** link in the workflow condition and type "Approved", without the quotes, in the text box.



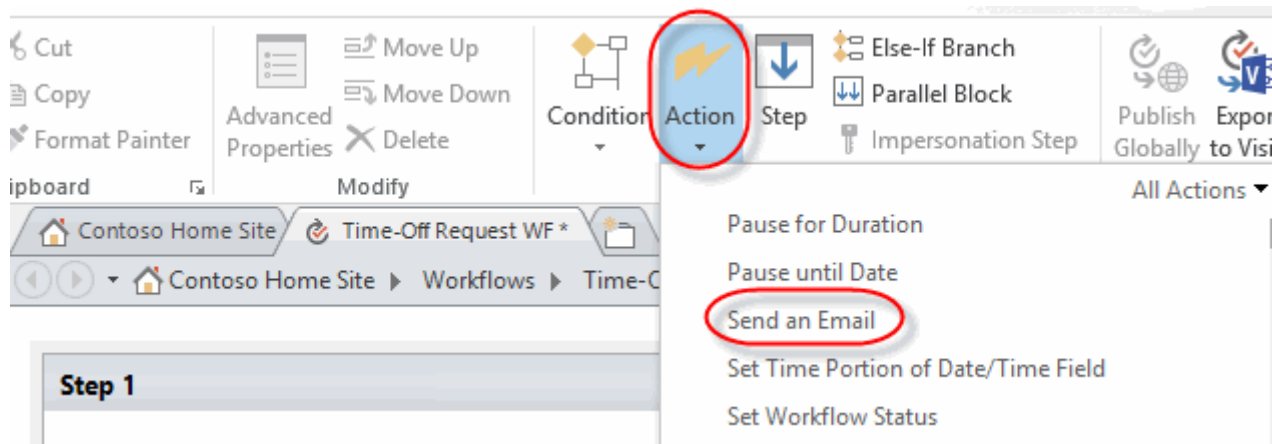
10. Add a **Send an Email** action inside the **If** condition.



1. Hover and click the orange bar directly below the label (**Start typing or use the Insert group in the Ribbon**).



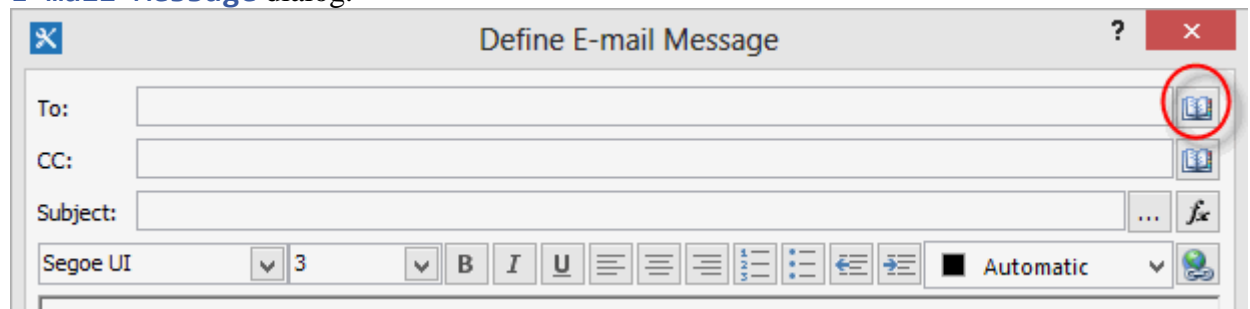
2. Select **Send an Email** from the **Action** menu drop-down button on the **Workflow** tab toolbar.



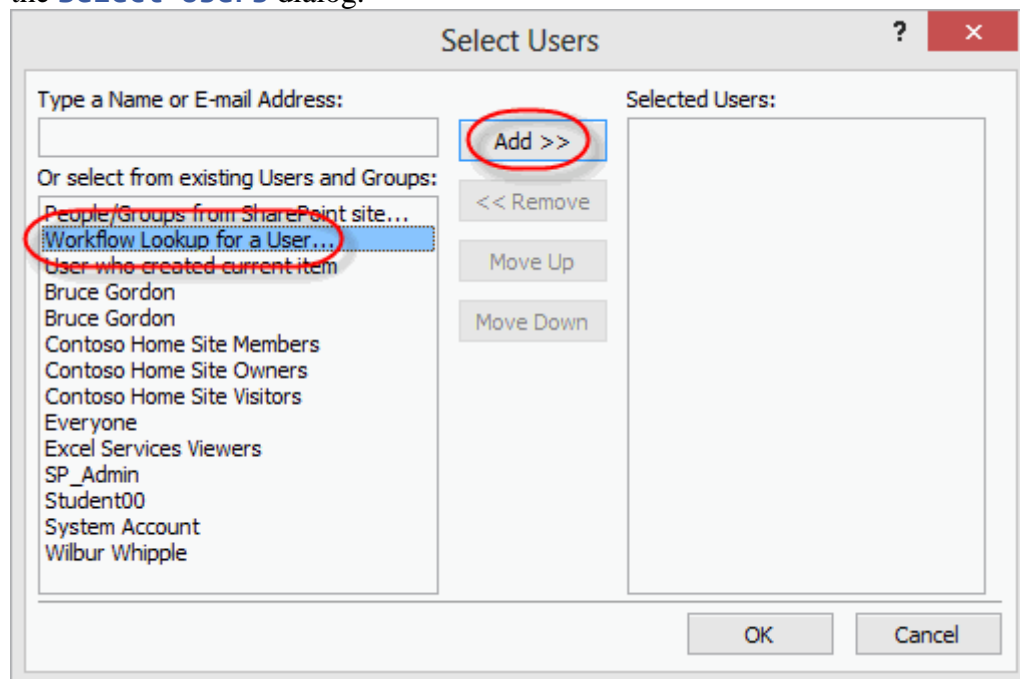
3. Click the **these users** link in the **Send an Email** action.



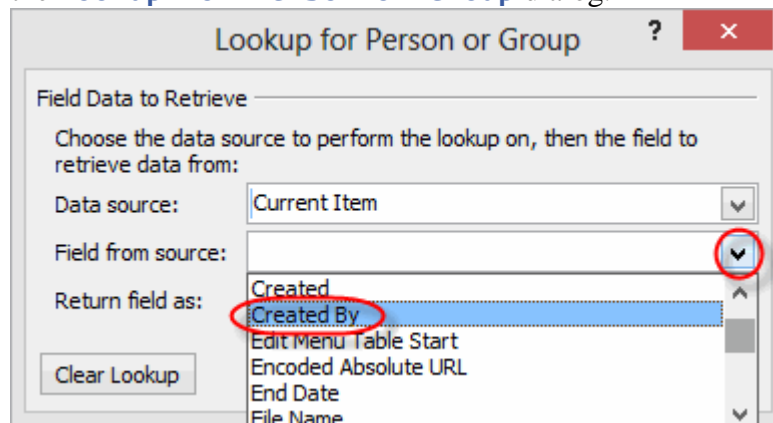
4. Click the **User Lookup** icon, looks like a book, next to the **To** field in the **Define E-mail Message** dialog.



5. Click the **Workflow Lookup for a User...** option and click the **Add** button in the **Select Users** dialog.



6. Select **Created By** in the **Field from source** drop-down list field of the **Lookup for Person or Group** dialog.



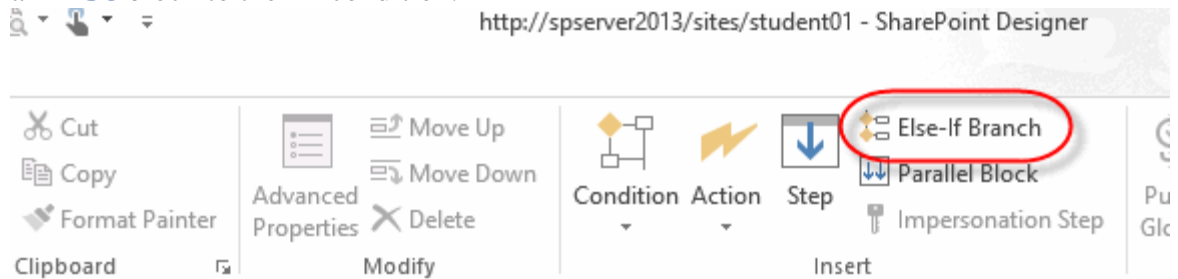
7. Click the **OK** button to close the **Lookup for Person or Group** dialog and save your settings.
8. Click the **OK** button to close the **Select Users** dialog and save your settings.
9. Type "Vacation Request Approved" in the **Subject** field of the **Define E-mail Message** dialog.
10. Type "Your vacation request has been approved" in the **Body** field of the **Define E-mail Message** dialog and click the **OK** button to close and save.

11. Add an **Else** block to the If condition.

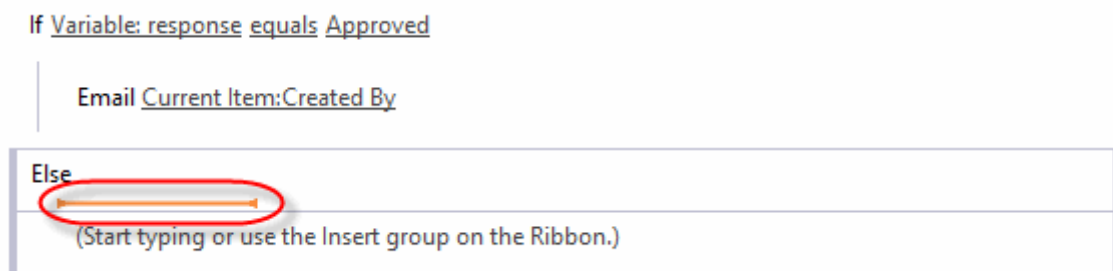
1. Hover and click the orange bar below the **Send an Email** action.



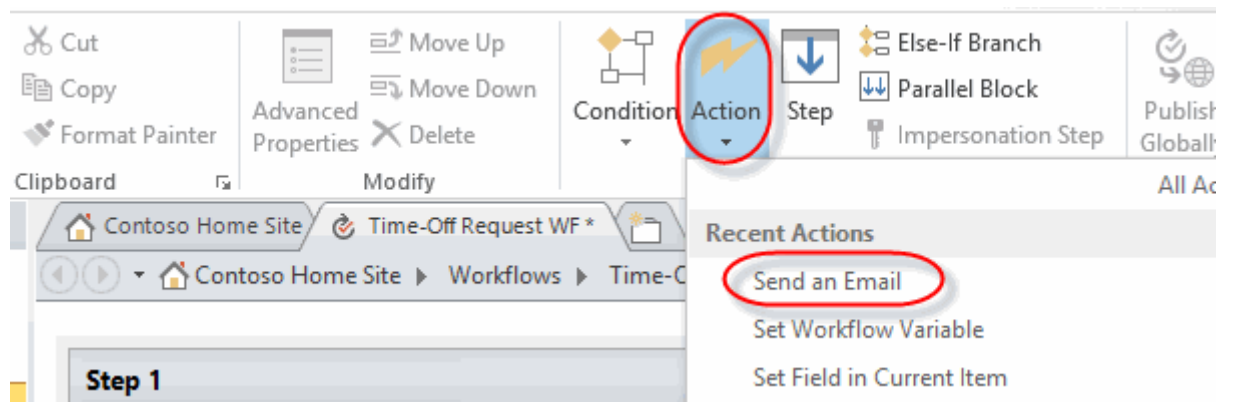
2. Click the **Else-If Branch** button on the **Workflow** tab toolbar to add an **Else** block to the **If** condition.



3. Hover and click the orange bar directly below the **Else** label.



4. Select **Send an Email** from the **Action** menu drop-down button on the **Workflow** tab toolbar.



5. Click the **these users** link in the **Send an Email** action.

If Variable: response equals Approved


Email Current Item:Created By


Else


Email **these users**



6. Click the **User Lookup** icon, which looks like a book, next to the **To** field in the **Define E-mail Message** dialog.

**Define E-mail Message**

To: 

CC: 

Subject: 

Segoe UI 3 B I U  Automatic 

7. Click the **Workflow Lookup for a User...** option and click the **Add** button in the **Select Users** dialog.

**Select Users**

Type a Name or E-mail Address:

Or select from existing Users and Groups:

**Workflow Lookup for a User...**

People/Groups from SharePoint site...

User who created current item

Bruce Gordon

Bruce Gordon

Contoso Home Site Members

Contoso Home Site Owners

Contoso Home Site Visitors

Everyone

Excel Services Viewers

SP\_Admin

Student00

System Account

Wilbur Whipple

**Add >>**

<< Remove

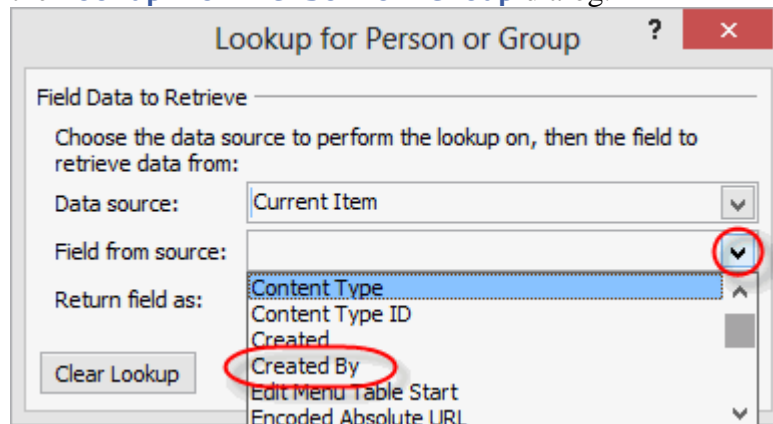
Move Up

Move Down

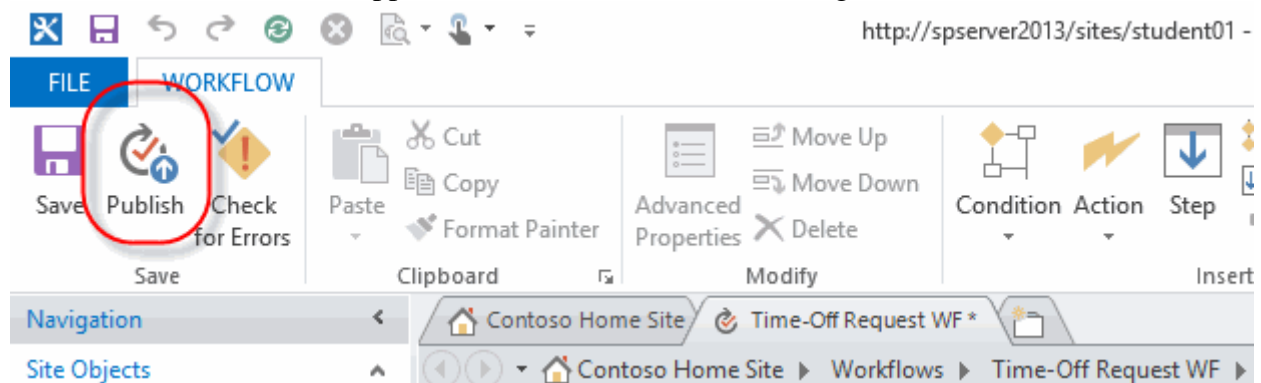
Selected Users:

OK Cancel

8. Select **Created By** in the **Field from source** drop-down list field of the **Lookup for Person or Group** dialog.

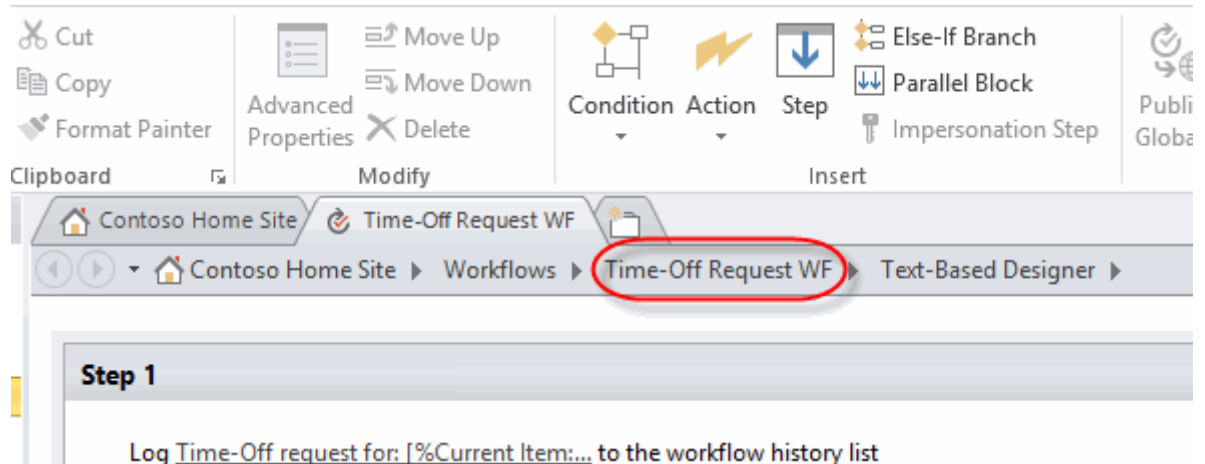


9. Click the **OK** button to close the **Lookup for Person or Group** dialog and save your settings.
10. Click the **OK** button to close the **Select Users** dialog and save your settings.
11. Type "Vacation Request Rejected" in the **Subject** field of the **Define E-mail Message** dialog.
12. Type "Your vacation request has been rejected" in the **Body** field of the **Define E-mail Message** dialog and click the **OK** button to close and save.
12. Save the **Time-Off Request WF** workflow.
  1. Click the **Save** icon in the upper-left corner the SharePoint Designer window.

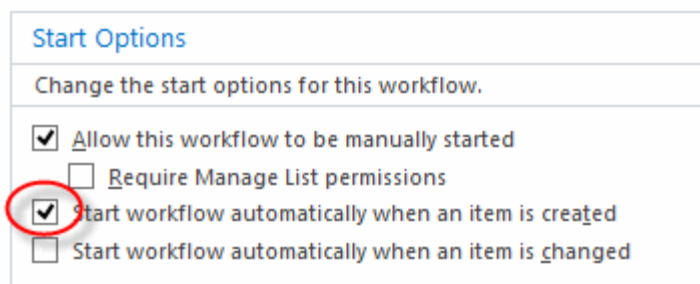


13. Change the **Time-Off Request WF** to start automatically when a new item is added to the list.

1. Click the **Time-Off Request WF** breadcrumb at the top of the workflow editor area.



2. Check the **Start workflow automatically when an item is created** check box under **Start Options**.



14. Publish the **Time-Off Request WF** workflow.

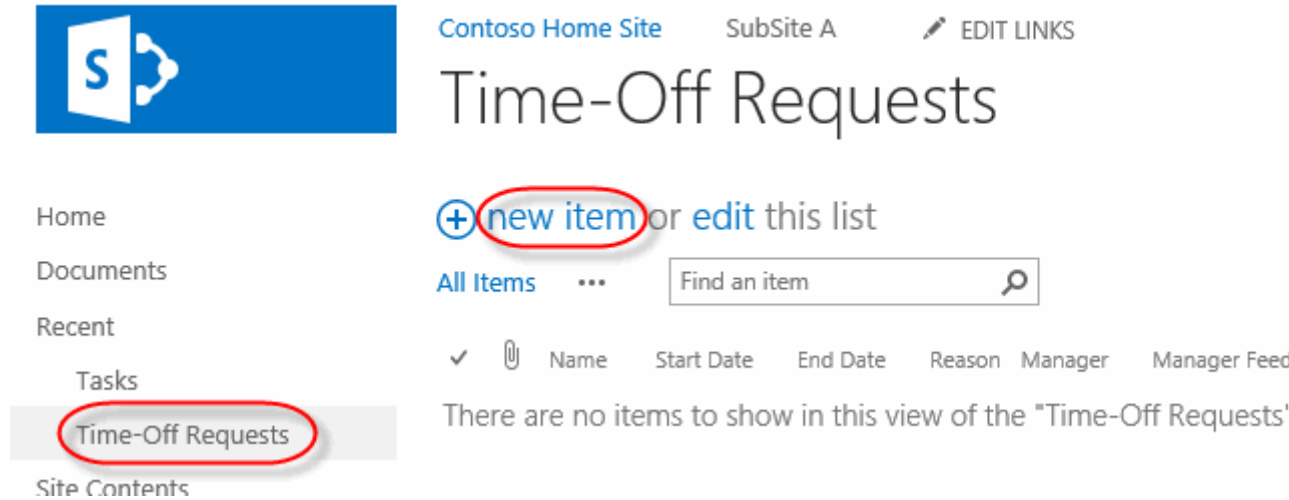
1. Click the **Publish** button on the **Workflow Settings** tab toolbar.



15. Create a new item in the **Time-Off Requests** list to test the custom workflow.

1. Switch back to your browser window or open one if you don't have one already open and browse to your site.
2. Click the **Time-Off Requests** link in the site's **Quick Launch** menu.

- Click the **new item** link in the list.



- Enter the following information in the **Time-Off Requests- New Item** dialog and replace the **Name** and **Manager** fields with your account:

**Name** SP\_Admin  
**Start Date** Select the following week's Monday  
**End Date** Select the following week's Friday  
**Reason** Going Fishing  
**Manager** SP\_Admin


- Click the **Save** button to save the new time-off request item.
- Click the **Time-Off Requests** link in the site's **Quick Launch** menu to refresh the page.
- Verify the column **Time-Off Request WF** has been added and the status for the new list item is **In Progress**.

Name		Start Date	End Date	Reason	Manager	Manager Feedback	Time-Off Request V
SP_Admin	...	1/14/2013	1/18/2013	Going Fishing	<input type="checkbox"/> SP_Admin		<b>In Progress</b>

Until the task created by the workflow is completed, the workflow will remain **In Progress**. Once the task is completed, the workflow will continue to the next action defined in the workflow.

- Complete the **Time-Off Request WF** custom task.

1. Click the **Site Contents** link in the site's **Quick Launch** menu.
2. Click the **Tasks** link on the **Site Contents** page.
3. Click the **Time-Off Request Task** link to open it.

Title	Assigned To	Status	Priority	Due Date	% Complete	Predecessors	Related Cont
Time-Off Request Task 	SP_Admin	Not Started	(2) Normal				SP_Admin

4. Select **Approved** in the **Time-Off Response** drop-down field and type "Of course, you can have all the time off you want!" in the **Manager Comments** field.

Title	Time-Off Request Task
Time-Off Response	Approved
Manager Comments	Of course, you can have all the time off you want!
<div>Complete Task</div> <div>Cancel</div>	

5. Click the **Complete Task** button to complete the task and continue the workflow.
17. Verify the **Time-Off Request WF** custom workflow has completed.
1. Click the **Time-Off Requests** link in the site's **Quick Launch** menu.



Home

Documents

Recent

Tasks

Time-Off Requests

Site Contents



2. Verify the **Manager Feedback** column includes the Manager's comments and the **Time-Off Request WF** column status is **Completed**.

Name	Start Date	End Date	Reason	Manager	Manager Feedback	Time-Off Request
SP_Admin ✱	...	1/14/2013	1/18/2013	Going Fishing	<input type="checkbox"/> SP_Admin Request feedback from Manager: Of course, you can have all the time off you want!	<b>Completed</b>

3. Click the **Completed** link in the **Time-Off Request WF** column to view the workflow history.
4. Verify the **Log to History List** action in your workflow added the custom message to the history log.

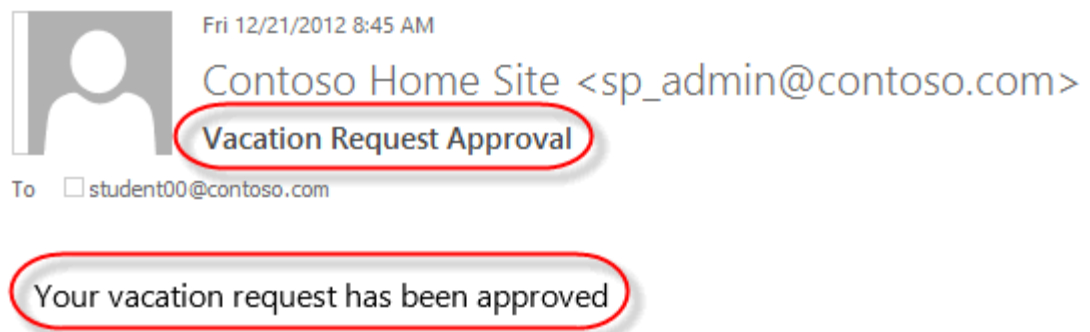
#### Workflow History

The workflow recorded these events.

<input type="checkbox"/> Date Occurred	Event Type	<input type="checkbox"/> User ID	Description
12/20/2012 8:44 AM	Comment	<input type="checkbox"/> System Account	Time-Off request for: SP_Admin

18. Verify the email was sent.

1. Open Microsoft Outlook.
2. Open the email message from your site with the subject of **Vacation Request Approval** and verify the body matches what you configured in the workflow.

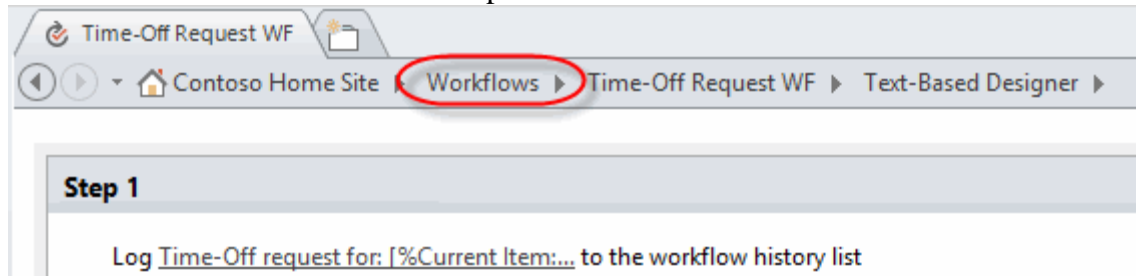


3. Close the email message and close Outlook.

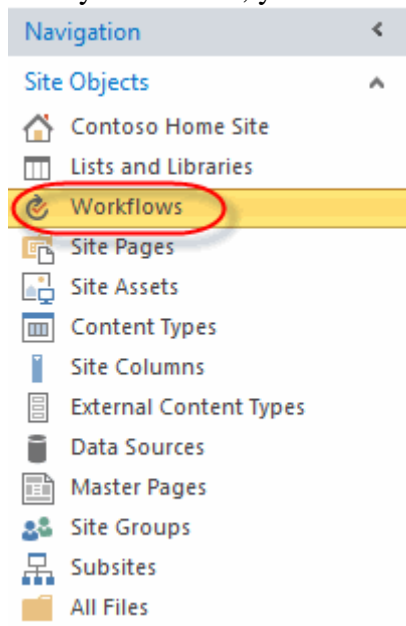
## Creating Reusable Workflows

Duration: 15 to 25 minutes.

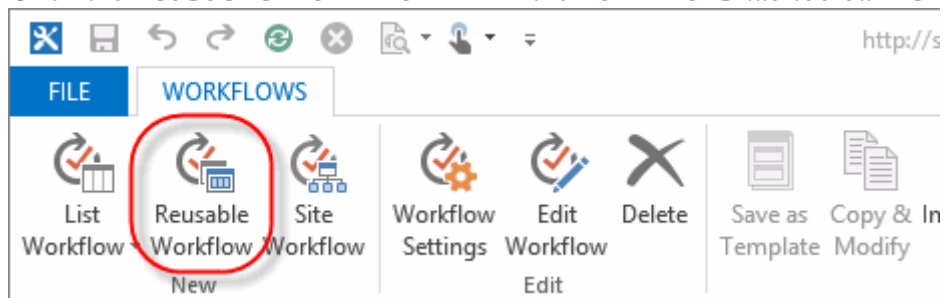
1. Create a reusable workflow for the document content type using SharePoint Designer.
  1. Navigate back to SharePoint Designer or open a new instance if you closed it from the previous exercise.
  2. If the **Time-Off Request WF** is still open from the previous exercise, click the **Workflows** breadcrumb at the top of the editor tab.



Or if you closed it, you can click the **Workflows** link in the **Navigation** menu.



3. Click the **Reusable Workflow** link in the **WORKFLOWS** tab toolbar **New** group.



4. Type "Reusable Doc WF" in the **Name** field and choose **Document** in the **Content Type** drop-down field and click the **OK** button.

**Create Reusable Workflow**

Add a new reusable workflow to your site

Enter a name and description for your new workflow

Name: **Reusable Doc WF**

Description:

Pick a base content type to limit this workflow to

Content Type: **Document**

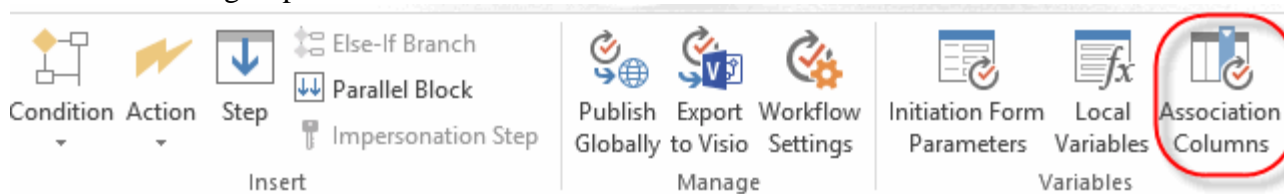
Choose the platform to build your workflow on

Platform Type: **SharePoint 2010 Workflow**

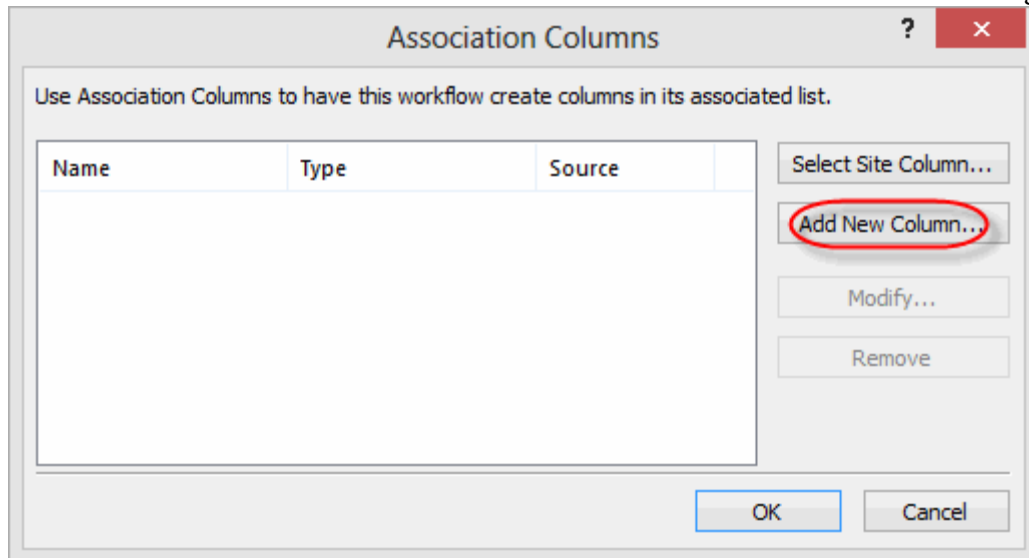
*The option for the SharePoint 2013 Workflow platform is not available because the workflow service is not configured on the server. Please contact your server administrator.*

**OK** **Cancel**

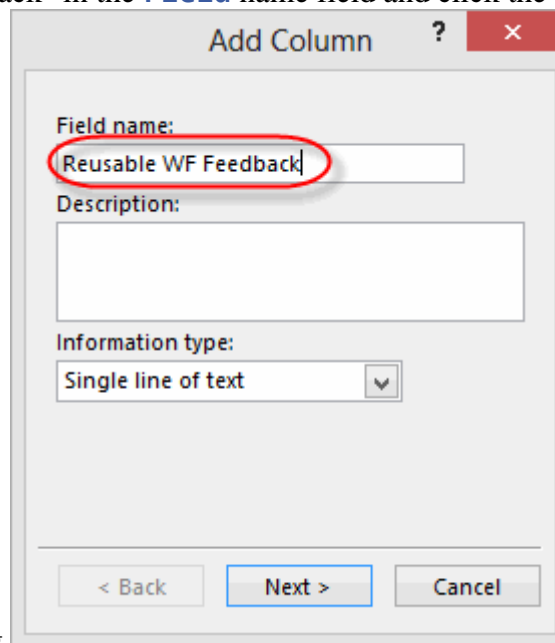
2. Add an **Association Column** to the **Reusable Doc WF**.
  1. Click the **Association Columns** button in the **WORKFLOW** tab toolbar in the **Variables** group.



2. Click the **Add New Column...** button on the **Association Columns** dialog.



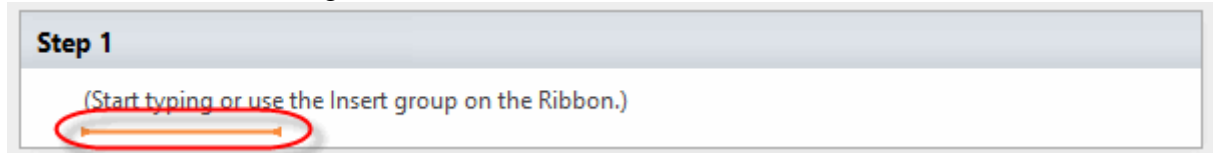
3. Type "Reusable WF Feedback" in the **Field** name field and click the **Next** button



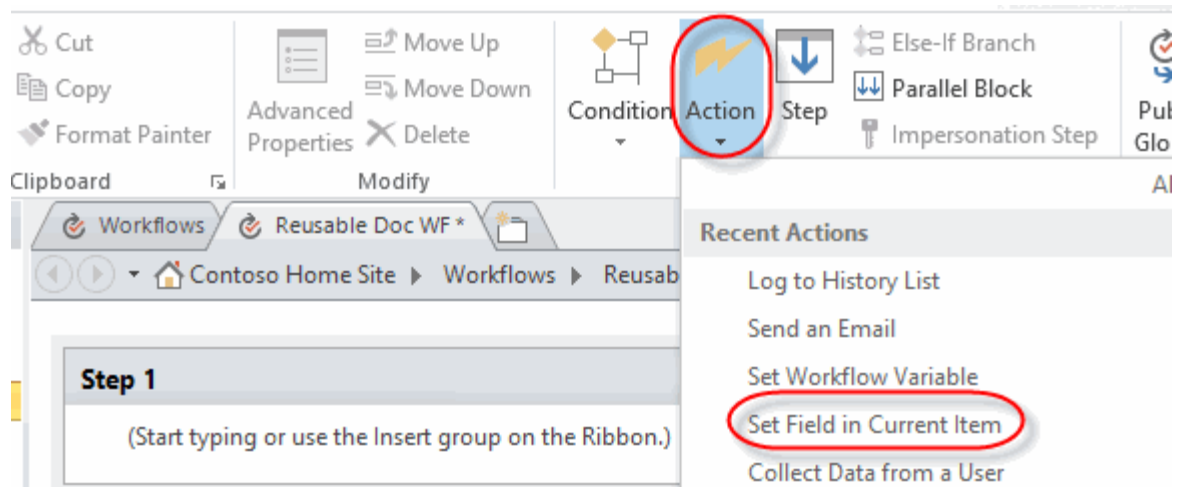
on the **Add Column** dialog.

4. Leave the **Default value** field empty and click the **Finish** button of the **Column Settings** dialog.
5. Click the **OK** button to close the **Association Columns** dialog and save your column setting.
3. Add a **Set Field in Current Item** action to the **Reusable Doc WF** and configure it to write text into the **Reusable WF Feedback** associated column.

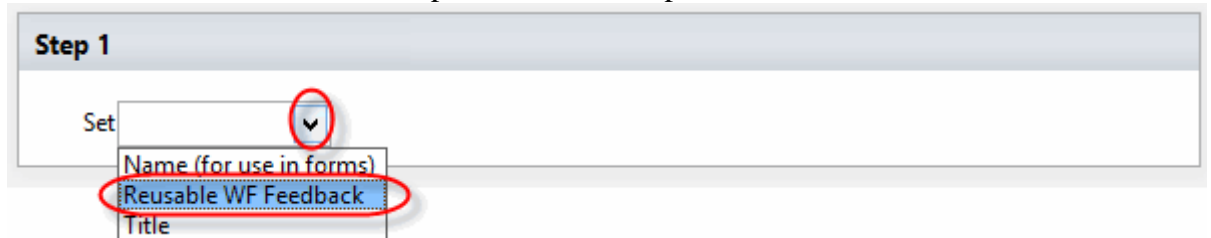
1. Hover and click the orange bar within **Step 1** of the **Reusable Doc WF**.



2. Click the **Action** drop-down button in the **Workflows** tab toolbar and choose the **Set Field in Current Item** action.

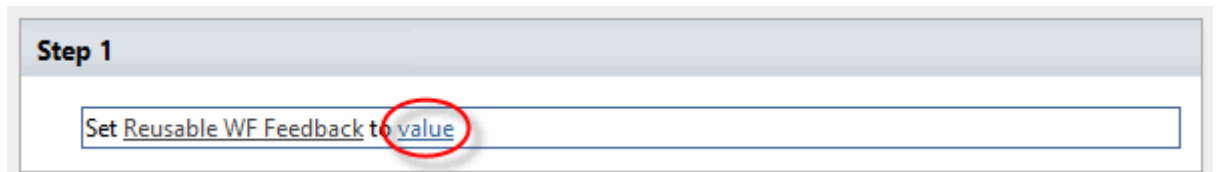


3. Click the **field** link in the **Set Field in Current Item** action and choose the **Reusable WF Feedback** option from the drop-down list.



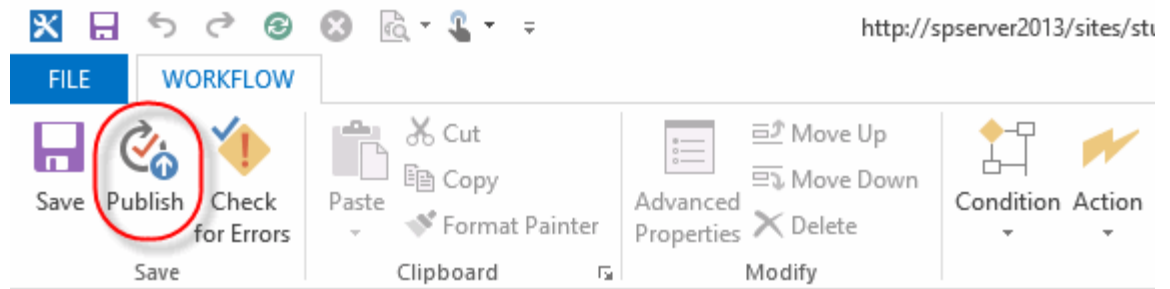
Only fields defined in the content type and associated columns are available to use in a reusable workflow.

4. Click the **value** link in the **Set Field in Current Item** action.



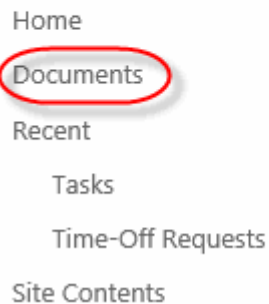
5. Type "This message was created by the Reusable Doc WF!" in the value text box.
4. Publish the **Reusable Doc WF**.

1. Click the **Publish** button in the **WORKFLOW** tab toolbar's **Save** group.

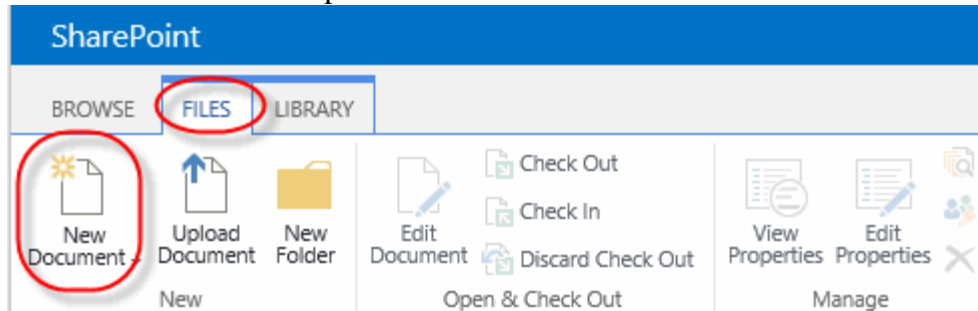


5. Associate and test the **Reusable Doc WF** workflow with the **Shared Documents** library of your site.

1. Switch back to your browser window or open one if you don't have one already open and browse to your assigned student site.
2. Click the **Documents** link in the site's **Quick Launch** menu.

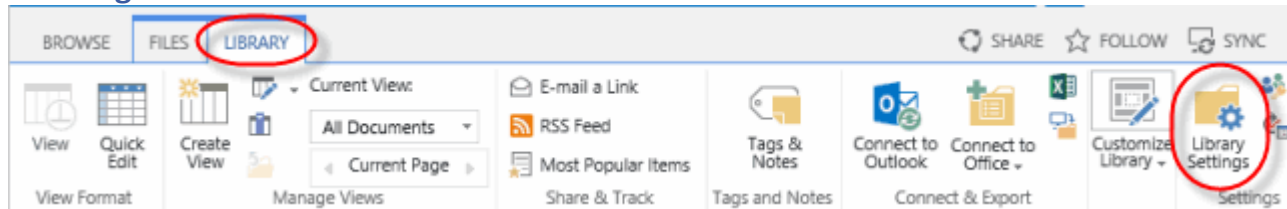


3. Click the **FILES** tab to open the toolbar and click the **New Document** button.



4. Type "This is a sample document for use with a reusable workflow." in the new Word document and click the **Save** icon in the upper-left corner of the Microsoft Word window.

5. Click **Shared Documents** from the **Other Web Locations** on the Word **Save As** page.
6. Type "Sample WF Doc" in the **File name** field and click the **Save** button.
7. Close Microsoft Word.
8. Click the **LIBRARY** tab to open the toolbar and click the **Library Settings** button.



9. Click the **Advanced** settings link under the **General Settings** group.
10. Click the **Yes** radio button for the **Allow management of content**

#### Content Types

Specify whether to allow the management of content types on this document library. Each content type will appear on the new button and can have a unique set of columns, workflows and other behaviors.

Allow management of content types?

☒ **Yes** ☐ No

**types** option.

11. Click the **OK** button to save the setting.
12. Click the **Workflow Settings** link under **Permissions and Management**.

#### General Settings

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Column default value settings
- Rating settings
- Audience targeting settings
- Form settings

#### Permissions and Management

- Delete this document library
- Save document library as template
- Permissions for this document library
- Manage files which have no checked in version
- **Workflow Settings**
- Information management policy settings
- Enterprise Metadata and Keywords Settings
- Generate file plan report

#### Communications

- RSS settings

13. Click the **Add a workflow** link.

14. Select **Document** from the **Run on items of this type** drop-down field.

**Content Type**

Select the type of items that will run the workflow. If the workflow that you want to add is a content type workflow, select the name of the content type.

Run on items of this type:

Document



The type that you select filters the list of workflow templates.

15. Select **Reusable Doc WF** from the **Select a workflow template** list box.

**Workflow**

Select a workflow to add to this content type. If a workflow is missing from the list, your site administrator may have to publish or activate it

Select a workflow template:

Disposition Approval

Reusable Doc WF

Three-state

16. Type "Reusable Document WF Test" in the **Type a unique name for this workflow** field.

**Name**

Enter a name for this workflow. The name will be used to identify this workflow to users of this content type.

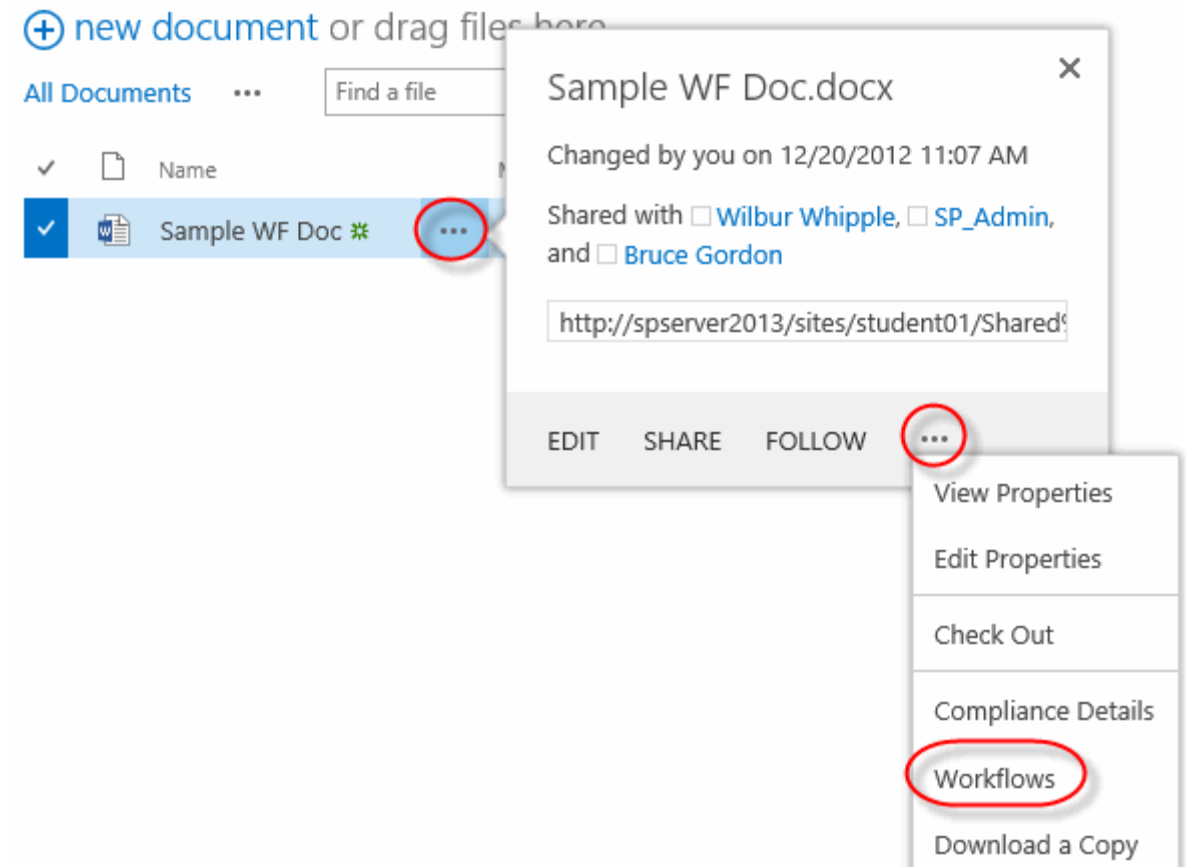
Enter a unique name for this workflow:

Reusable Document WF Test

17. Leave the rest of the workflow settings at their defaults and click the **OK** button at the bottom of the form.
18. Click the **Documents** link in the site's **Quick Launch** menu to navigate back the default view of the library.
19. Click the ellipsis link next to the **Sample WF Doc** link then click the second ellipsis link in the balloon pop-up to open the context menu and click

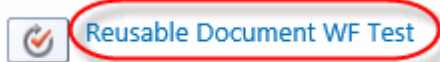


the **Workflows** link.



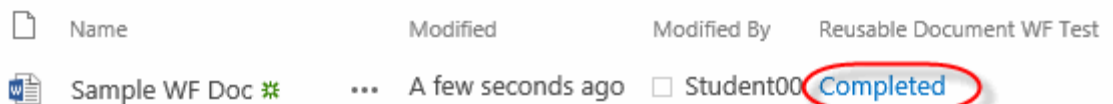
20. Click the **Reusable Document WF Test** link.

[Start a New Workflow](#)



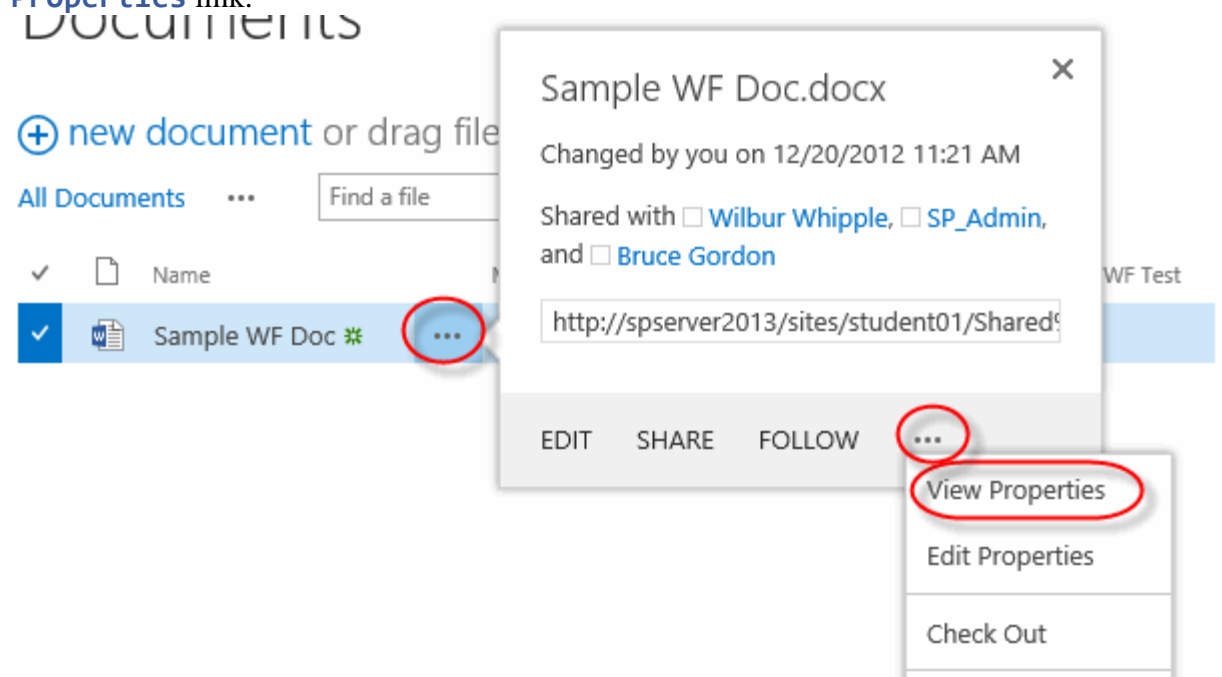
21. Click the **Start** button to start the workflow.

22. Verify the **Reusable Document WF Test** column has the status of **Completed**.



23. Click the ellipsis link next to the **Sample WF Doc** link and then click the second ellipsis link in the balloon pop-up to open the context menu and click the **Edit**

[Properties](#) link.



24. Verify the **Reusable WF Feedback** field exists and has the text "**This message created by the Reusable Doc WF!**" in it.

Name *	<input type="text" value="Sample WF Doc"/> .docx
Title	<input type="text"/>
Reusable WF Feedback	<input type="text" value="This message was created by the Reusable Doc WF!"/>
Created at 12/20/2012 11:07 AM by <input type="checkbox"/> Student00	<input type="button" value="Save"/> <input type="button" value="Cancel"/>
Last modified at 12/20/2012 11:21 AM by <input type="checkbox"/> Student00	

25. Click the **Cancel** button to close the dialog.
6. Close SharePoint Designer.