Create a workflow that sends e-mail notifications about high priority tasks

● **Step 1, open SharePoint Designer 2013 and create a new task app list**
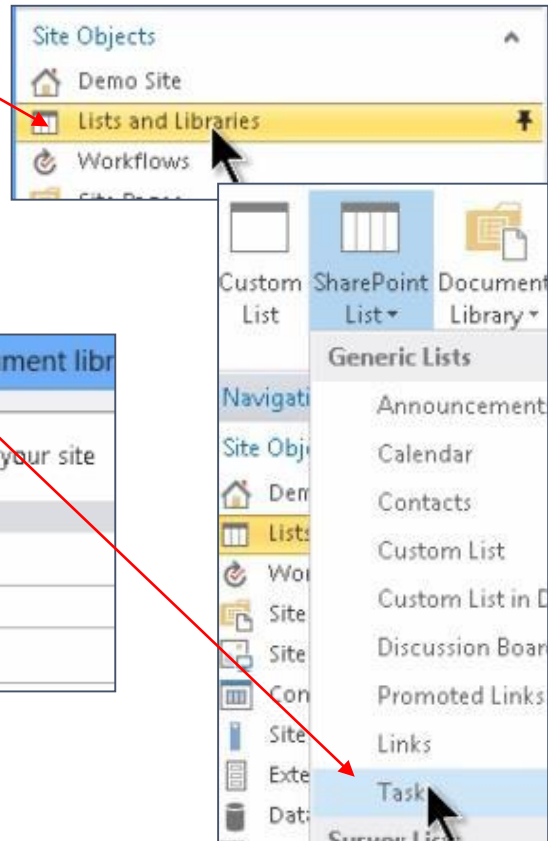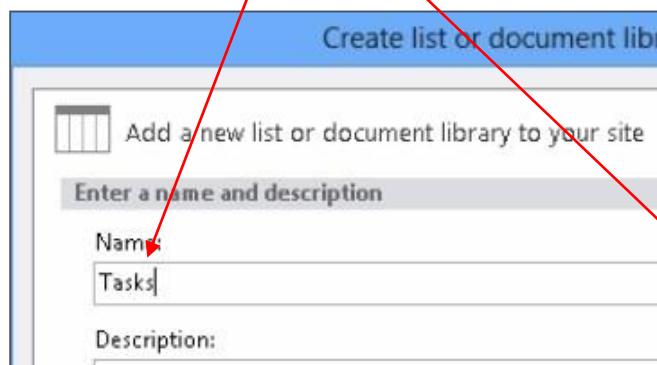
1) Go to the SharePoint Designer 2013

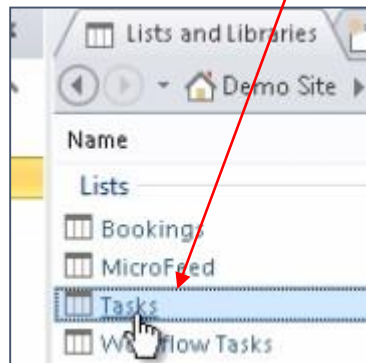2) Click on the "Lists and Libraries"

3) Click on "SharePoint List"

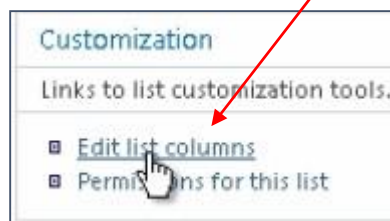4) Select the "Task"

5) Enter the Name: **Tasks**

6) Click OK

7) Click on the list "Tasks"

8) Click on "Edit list columns" under **Customization**

9) Select and delete the following columns

   a) Predecessors

    b) Related Items

    c) % Complete

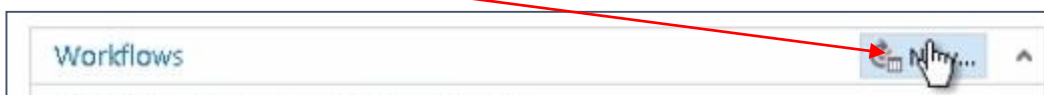10) Click Save

Column Name	Type
Task Name	Single lir
Predecessors	Lookup (
Priority	Choice (r
Task Status	Choice (r
% Complete	Number
Assigned To	Person o
Description	Multiple
Start Date	Date and
Due Date	Date and
Completed	Calculate
Related Items	Related I

- **Step 2, create a new workflow**

1) Open the Summary view

2) Click on the "Tasks" list
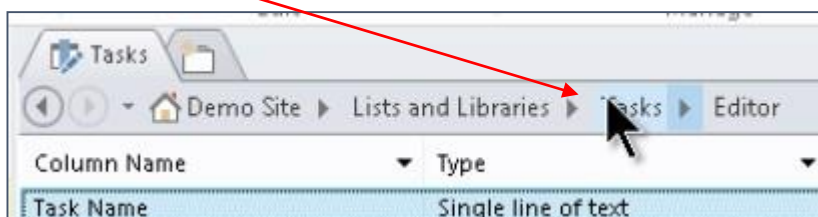
3) Go to Workflows

4) Click New

Workflows

a) Enter the Name: "SendEmail"

5) Select **Platform Type**: "SharePoint 2010 Workflow" from the dropdown list

6) Click OK
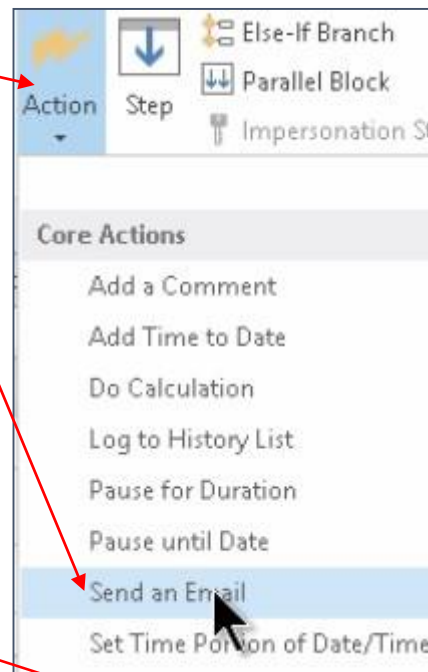

- **Step 3, set the conditions for the workflow**
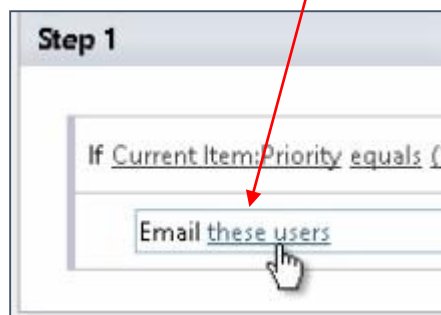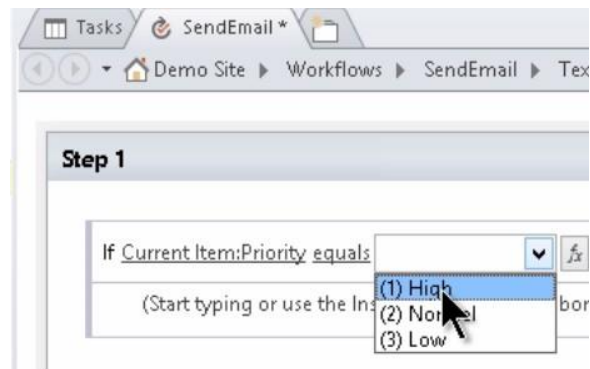
    1) Click on the "Condition" button
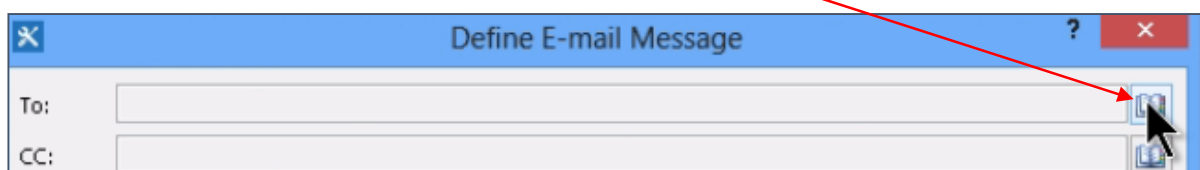
    2) Select the "If current item field equals value"
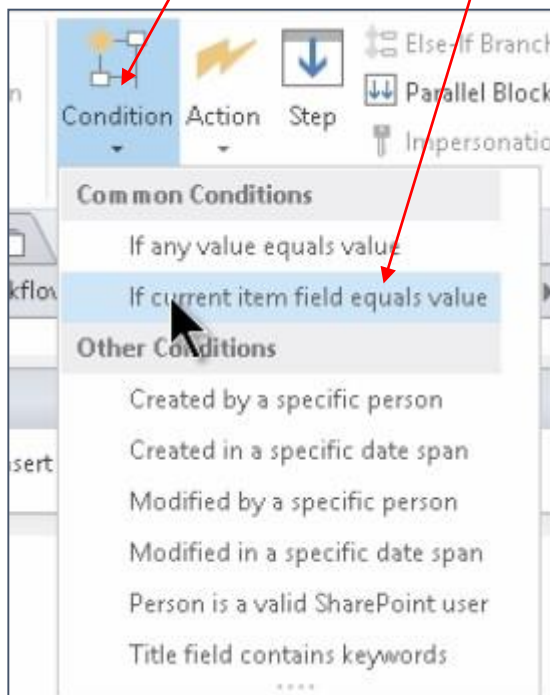
3) Click on "field"

4) Select "Priority" from the dropdown

Step 1

If field equals value

(Start typing or use the Insert group on the

Tasks | SendEmail *

Demo Site ▶ Workflows ▶ SendEmail ▶ Te

Step 1

If

Name (for use in forms)
Name (linked to document with edit menu) (ol
Order
Parent ID
Path
Previously Assigned To
Priority
Server Relative URL
Sort Type
Start Date
Task Name
Task Status
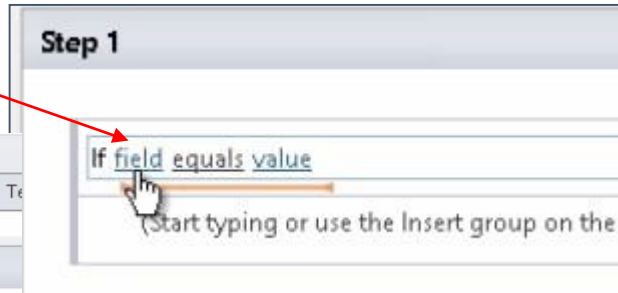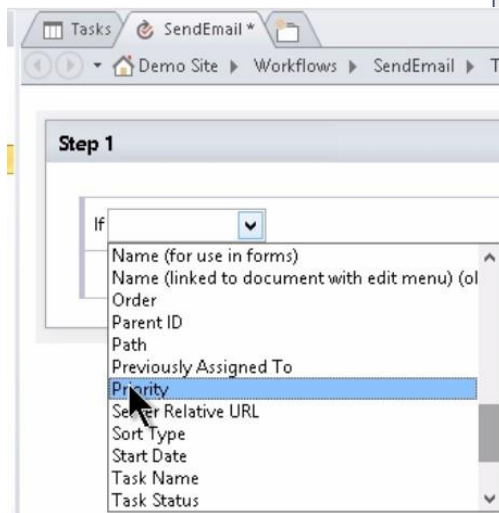
5) Click on "value"

6) Select "(1) High" from the dropdown list

Tasks | SendEmail *

Demo Site ▶ Workflows ▶ SendEmail ▶ Tex

Step 1

If Current Item:Priority equals

(1) High
(2) Normal
(3) Low

(Start typing or use the Ins   bor

7) Click on "Actions"

8) Select "Send an Email"

9) Click on the "these users" link

Step 1

If Current Item:Priority equals (1

Email these users

10) Click on the icon

Else-If Branch

Parallel Block

Action   Step   Impersonation S

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

Define E-mail Message   ?   ×

To:
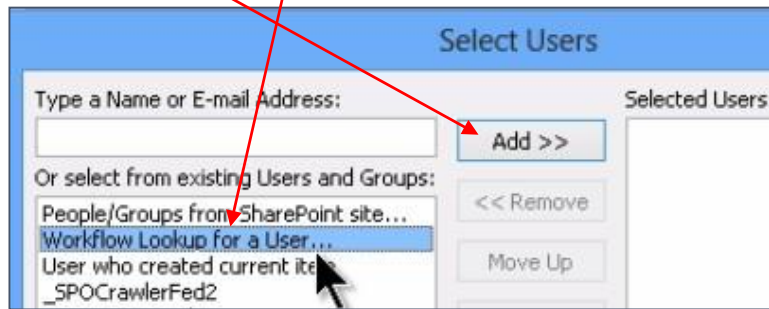
CC:
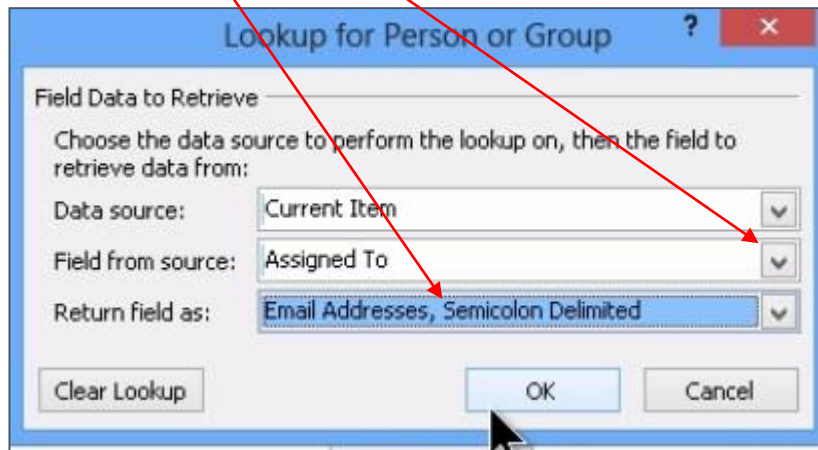
11) Select "Workflow Lookup for a User"

12) Click Add

13) Select "Assigned To" from the dropdown list

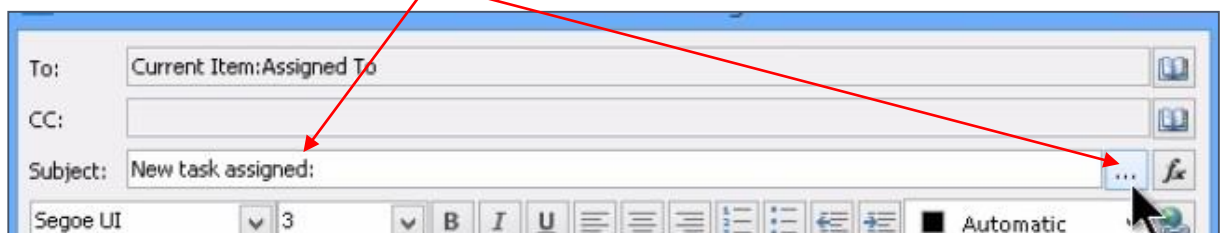14) Select "Email Addresses, Semicolon Delimited"
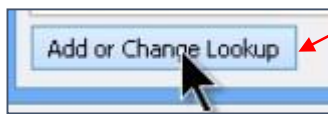
15) Click OK

16) Click OK

🔴 **Step 4, insert a hyperlink to the Edit item form in the email body**

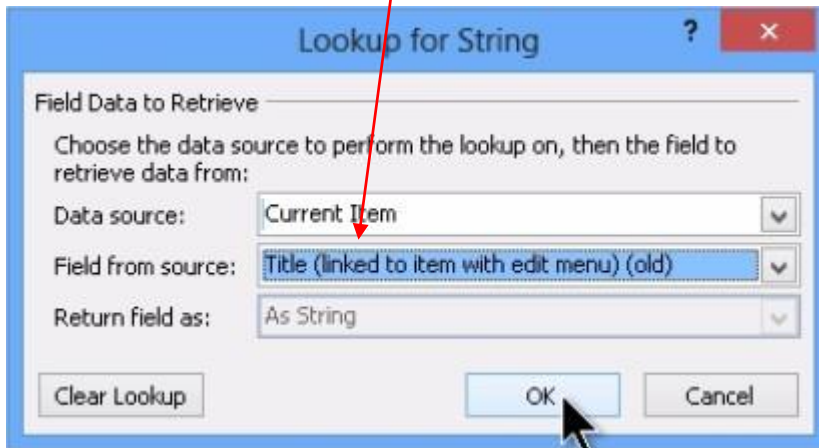1) Enter the "Subject": **New task assigned**
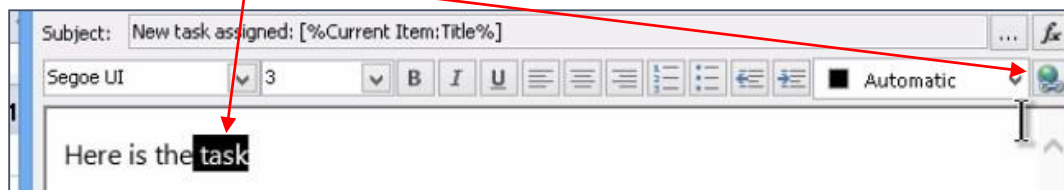
2)   Click on the ""Insert"icon

3) Click on "**Add or change Lookup**"

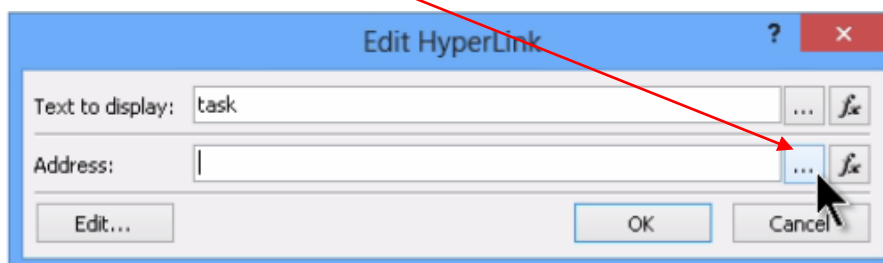4) Select "**Title (linked to item wih edit menu) (old)**" from the dropdown list

5) Click OK

6) Click OK to the String Builder dialog box

7) Enter the text in the e-mail body: "Here is the task"
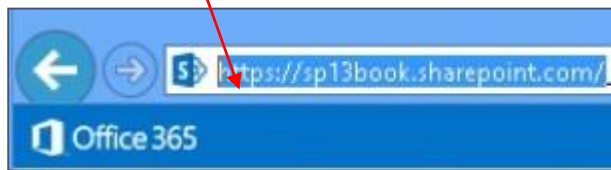
8) Select the text "task"

9) Click on the "Link" icon

10) Edit the link

    a) Click on the "Insert" icon
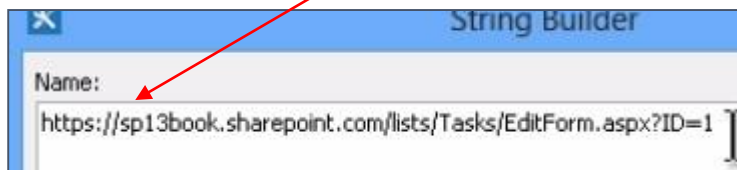

    b) Enter the URL "https://site.com/lists/Tasks/EditForm.aspx?ID=1"

       in the String Builder dialog box
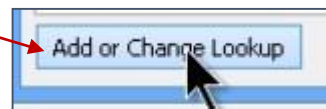
c) Go to the SharePoint site and copy the site URL

d) Go back to SharePoint Designer 2013

e) Remove the part https://site.com from the URL
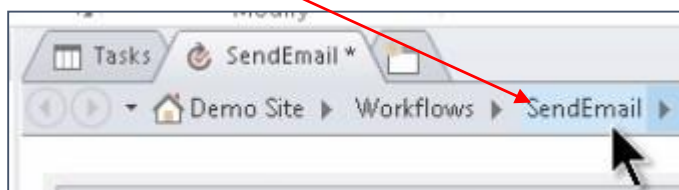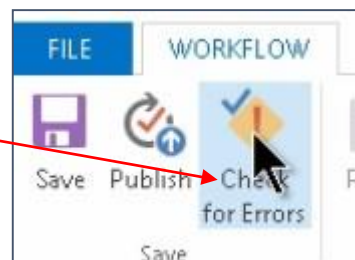
f) Paste the the URL copied from the SharePoint site

g) Click on the "Add or change Lookup"
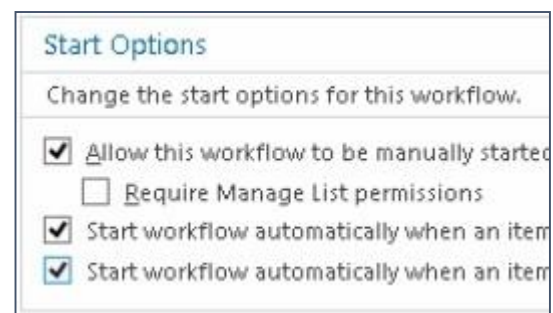
h) Select ID from the dropdown

i) Click OK

- 🔴 **Step 5, publish the workflow**

  11) Click on "Check for Errors"

  12) Click OK to the dialog box

  13) Open the summary

  14) Click on "SendEmail"
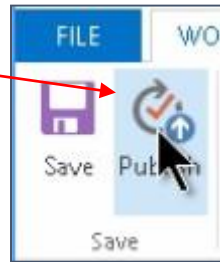

15) Go to the "Start Options"

    a) Check all of the options except
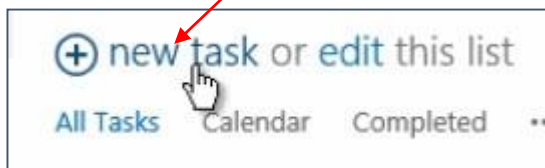
       "**Require manage List permissions**"

17) Click **Publish**

● **Step 6 , create a test task**

1) Go to the SharePoint site

2) Click on "**new task**"

3) Enter

   a) Task Name*: **Test 1**

   b) Assigned to:

   Peter Kalmstrom

   c) Priority: **(1) High**

4) Click Save

5) Click on "Outlook"

   in the top navigation

6) Check that the workflow

   has sent an e-mail