# SharePoint 2013 Demo – Creating Workflows with SharePoint Designer 2013

## Estimated time to complete this demo

15 minutes

## Objectives

Demonstration of following capabilities in SharePoint 2013

* Creating a Workflow with SharePoint Designer 2013

## Computers in this demo setup

This demo uses virtual machines as described in the following table. Before you begin the demo, you must start the virtual machines and then log on to the computers.

|  |  |
| --- | --- |
| **Virtual Machine** | **Role** |
| {Supplied by Instructor} | Domain Controller |
| {Supplied by Instructor} | Actual SharePoint environment with Office client and other required software. |

All user accounts in this lab use the password {Supplied by Instructor}.

## Getting started with demo

In the files provided with the hands on lab, run the batch file called **SetupModule.bat** by double clicking it. This file will execute a PowerShell script that will create a new site collection at [http://intranet.contoso.com/sites/Workflow](http://intranet.contoso.com/sites/Workflow%20) .

In addition also ensure that a user **Dan Jump** (**CORP\danj**) has been added to the **Site Collection Administrators** of this site. You must create & run workflows under this user rather than the administrator account because workflows cannot be started using a SYSTEM account.

# Creating Workflows with SharePoint Designer 2013

In this demo, you will create a simple workflow that updates a SharePoint list item. The workflow will be created using SharePoint Designer 2013.

## Step 1 – Create Workflow

In this task you will create a simple workflow that updates an item in SharePoint 2013 using SharePoint Designer 2013.

* Begin this task logged on to **SP as CORP\danj**.

1. Open **Internet Explorer** and navigate to the [http://](http://wave15-sp)intranet.contoso.com/sites/Workflow site.
2. Go to the **Lists, Libraries, and other Apps** page by clicking the **Site Contents** link in the **Quick Launch** navigation.
3. If one does not exist, create a new **Announcements** list named **Announcements**.
4. Open SharePoint Designer 2013: **Start ⮚ All Programs ⮚ SharePoint ⮚ Microsoft SharePoint Designer 2013**.
5. Click the **Open Site** button and login to the <http://intranet.contoso.com/sites/Workflow> site.
6. Click the **Workflows** tab in the ribbon and create a new workflow by clicking **List Workflow** button. Select the **Announcements** list.
7. When prompted name the workflow **My First Workflow** and select **Platform Type: SharePoint 2013 Workflow** and click **OK**.
8. Add a new action **Log to History List**:
   * Click the **Message** hyperlink and then the **[…]** button.
   * In the builder add the following: **The title of the current item is:**
   * Click the **Add or Change Lookup** button and use the following to add the title:
     1. **Data Source:** Current Item
     2. **Field from Source:** Title
9. Add another action **Set Field in Current Item**:
   * Set **field** to **Body**
   * Set **Value** to **Updated from my first workflow**.
10. In the **Transition to stage** section, add a **Go To a Stage** action and select the stage **End of Workflow**.

## Step 2 – Save, Publish and Test the Workflow

In this task you will test the workflow you just created.

* Begin this task logged on to **SP as CORP\danj**.

1. With the workflow open that you created in the previous step, go to the summary page.
2. **Check** the **Show workflow visualization on status page** checkbox.
3. Save the workflow by clicking the **Save** button in the ribbon.
4. Publishing the workflow by clicking the **Publish** button in the ribbon.
5. Go back to Internet Explorer and navigate to the **Announcements** list in the <http://intranet.contoso.com/sites/Workflow> site.
6. Select the **List Settings** button in the **List** tab of the ribbon when in the Announcements list.
7. Click the **Workflow Settings** link. Notice the workflow you created is listed.
8. Go back to the list by clicking the Announcements link in the title of the page.
9. Add a new item and save the item:
   * **Title:** Test Item 01
   * **Body:** <empty>
10. Go back into the item by clicking it in the list.

|  |
| --- |
| C:\Users\vesaj\Pictures\DVD_ART36\Artwork_Imagery\Icons - Illustrations\_ WINDOWS VISTA ICONS\Information more info.png **Additional In**f**ormation** |
| *Notice that the Modified By field at the bottom says it was last modified by Ken Sanchez.* |

1. Click the **Workflows** button in the ribbon.
2. Select the **My First Workflow** under the **Start a New Workflow** section.

|  |
| --- |
| C:\Users\vesaj\Pictures\DVD_ART36\Artwork_Imagery\Icons - Illustrations\_ WINDOWS VISTA ICONS\Information more info.png **Additional In**f**ormation** |
| *This will take a moment to start while SharePoint notifies Azure Workflow to start the workflow.* |

1. Go back to the item you created and keep refreshing the page until you see the **Body** field change.

|  |
| --- |
| C:\Users\vesaj\Pictures\DVD_ART36\Artwork_Imagery\Icons - Illustrations\_ WINDOWS VISTA ICONS\Information more info.png **Additional In**f**ormation** |
| *Notice that the Modified By field at the bottom says it was last modified by Workflow on behalf of Dan Jump.* |

* This is the end of the demo