Creating an Approval Workflow

By: Laura Rogers
Rackspace Hosting
About Me

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My Latest Books

• Beginning SharePoint 2013: Building Business Solutions
• Using Microsoft InfoPath 2010 with Microsoft SharePoint 2010 Step by Step
About You

• Get out your phones or laptops...
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Agenda

• Introduction

• Business Process - Factors

• Options in SharePoint

• Task Process Pros and Cons

• Real world workflow scenarios
Introduction

Presentation Overview
Introduction

• Image here
Business Process Factors

Considerations
Factors to Consider

• Parallel and serial portions of the workflow
• Email notifications versus task assignment
• User Interface Planning
• Task dependency on other task(s)
• Interaction with other systems/databases?
• Outcomes (approve/reject versus completions)
Parallel and serial tasks

- Task 1
- Task 2
- Task 3
- Task 4
- Task 5
- Task 6
Notifications Versus Tasks
User Interface Planning

New Hires Home Page

Newsfeed

Start a conversation

It's pretty quiet here. Invite more people to the site, or start a conversation.
Task Branching and Dependencies

1. Submit New Hire Form
2. Manager Approval
3. IT Create User Account
4. HR Send Welcome Packet
5. Is Employee in IT?
   - Yes: Phone Set Up
   - No: IT Security Set Up
6. HR Approval
7. Employee Orientation
8. Completed
Interactions with External Data
Outcomes

• Some tasks are approvals
• Some simply are marked as completed
Options in SharePoint

Types of approvals
Content Approval

Out-of-Box Workflows (2010)

Task actions in SharePoint Designer workflows

Custom tasks / Complex processes
DEMO

Simple Types of Approvals (the first 3)
Task Process Pros and Cons
SharePoint Designer – Task Process

**Pros**
- Easy to set up / easy interface
- Built in notification emails
- Configurable overdue reminders
- Can assign tasks to all the individuals in a group
- Configurable task completion criteria

**Cons**
- Can’t set extra task field values
- No lookup relationship to task list
- Tasks delete themselves after 60 days
- Difficult to do multiple task titles / descriptions
- Parallel task challenges
  - Easy if all identical (such as everyone approve this)
  - Impossible if working with varying task names.
DEMO

Task Process in SharePoint 2013
Real World Scenarios
Custom Task Scenarios - Considerations

- Use “Create List Item” action to create tasks
- All task fields are configurable, especially a Lookup!
- Create logic to determine if task exists already
- With a lookup to the original item... dashboards!
- Determine if parallel tasks have been completed
- Are task assignees filling in task fields?
- Send task info back to original form / item?
- Create task notification email workflow on task list
DEMO

Complex Business Process – HR Onboarding
Thank you for attending!

Laura Rogers
http://www.wonderlaura.com

Come see us at the Rackspace booth!
New Hire Workflow Diagram

• See zip file in here: http://www.wonderlaura.com/Presentations/Forms/All Items.aspx