

Kaldeera Workflow Designer 2010

User's Guide

Version 1.0

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Index

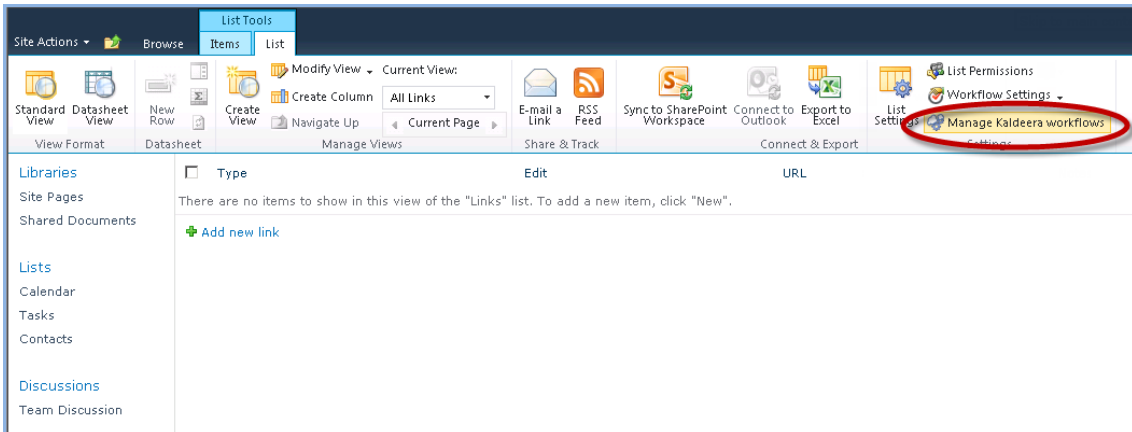
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1 Chapter 1: Using Kaldeera Workflow Designer 2010

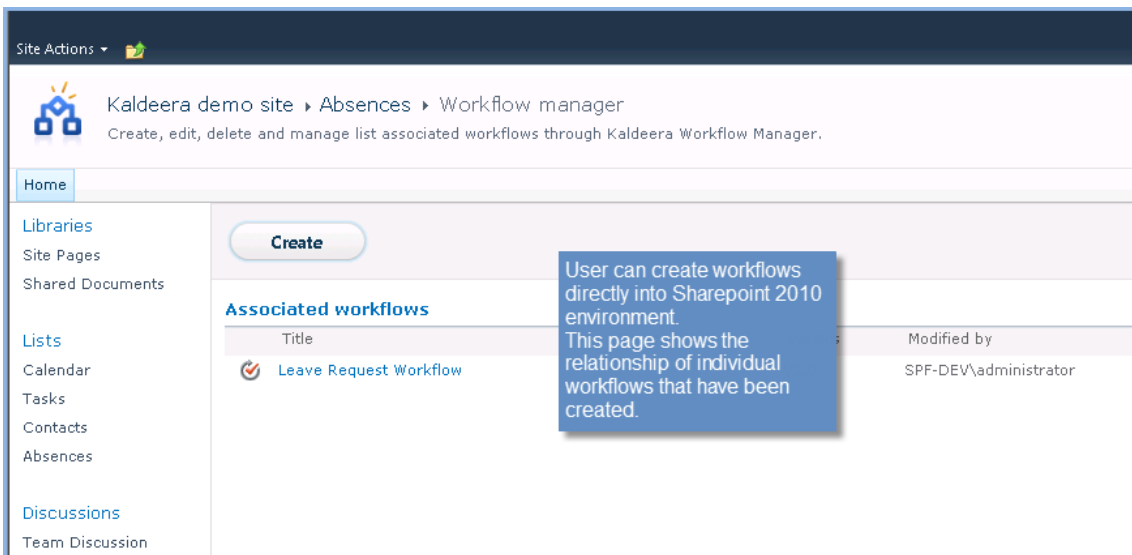
1.1 Getting Started with Kaldeera

1.1.1 Creating a workflow

First, navigate to a library or list then click the "List Tools" -> "List" button. Then:



Select the "Manage Kaldeera Workflows" option. The Workflow Gallery page will load. You can then select "Create" from near the top of the page.



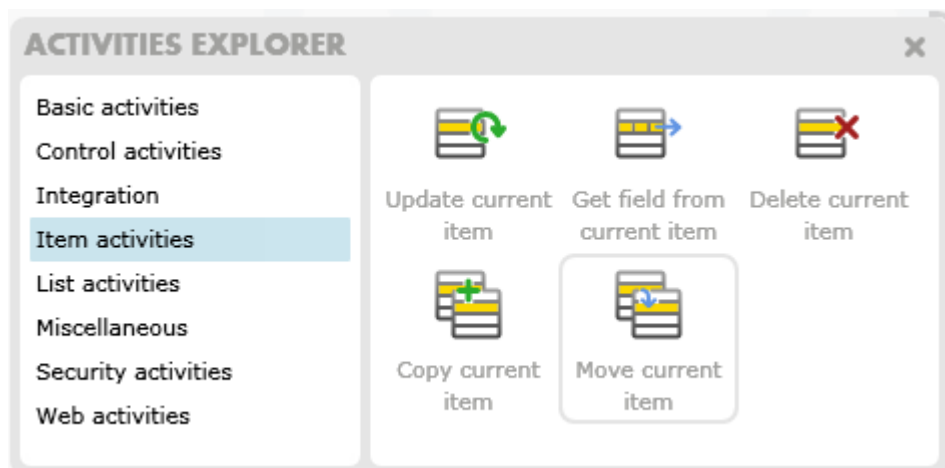
1.1.2 The Workflow Designer canvas

Once you have arrived at the workflow designer page, you will see two major sections. At the bottom-left of the page is the "Workflow Activities" palette and the section (occupying the majority of the page) is the design canvas.

1.1.3 The Workflow Activities palette

The actions palette displays the activities that can be used in the design canvas to create workflows. The actions are divided into groups of related actions. Click the heading of a group to expand it and close the one that is currently open. The default groupings are:

- Basic Activities
- Control Activities
- Integration
- Item Activities
- List Activities
- Miscellaneous
- Security Activities
- Web Activities



1.1.4 Adding actions to the design canvas

To design a workflow, you need to add actions to it. That is done visually in this way:

1. Select the action you require from the palette
2. Left click and drag an action from the palette and drop it onto a red rounded mark on the design canvas.

1.1.5 Configuring actions

To change the settings used by the activity, double-click in the activity. You will see a pop-up window with a number of options:

- **Activity Name:** When a workflow action is added to the design canvas, it appears with a frame around it and a title bar. The title bar is an editable area under the action icon. Custom labels can be added according to your preferences, including in the title bar. There is no maximum length for the labels; however they are most effective when they are as short as possible.
- **Activity Properties Frame:** This area is variable in number of activity's properties, depending on the activity type.

Selecting "x" icon on the activity's title bar will remove the action and any modifications made to it from the workflow.

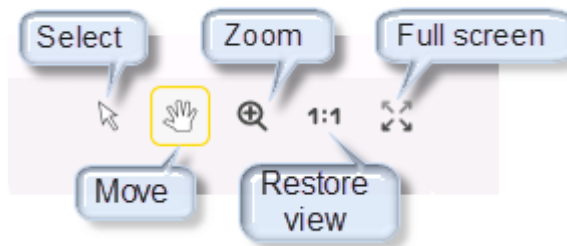
1.1.6 The Settings Menu

- **Save:** Please refer to Opening and saving workflows
- **Publish:** Please refer to Publishing a workflow
- **Export:** Please refer to Importing and exporting workflows
- **Import:** Please refer to Importing and exporting workflows
- **Settings (Startup Options):** Please refer to Workflow start options
- **Variables:** Please refer to Workflow variables
- **Exit:** End workflow editing and exit



1.1.7 The Navigation Menu

- **Select:** Select objects on the workflow canvas
- **Move:** Move the workflow canvas (Shortcut: space bar)
- **Zoom:** Zoom in (Shortcut: Ctrl + left click) / Zoom out (Shortcut: Ctrl + Shift + left click)
- **Restore view:** Restore the standard view and center the workflow canvas
- **Full screen:** View the workflow editor in full screen.

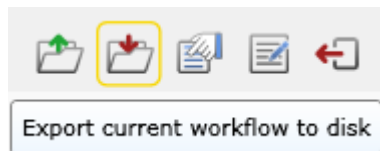


1.2 Importing and exporting workflows

Using the import or export workflow option will enable you to either convert the workflow currently displayed in the design canvas into a file or open a file of the same format in the design canvas.

1.2.1 Exporting a workflow

A workflow can be exported and saved in the file "*.kwf" format in order to be used in another location. To export a workflow, click the "Export" button at the top of the design canvas.



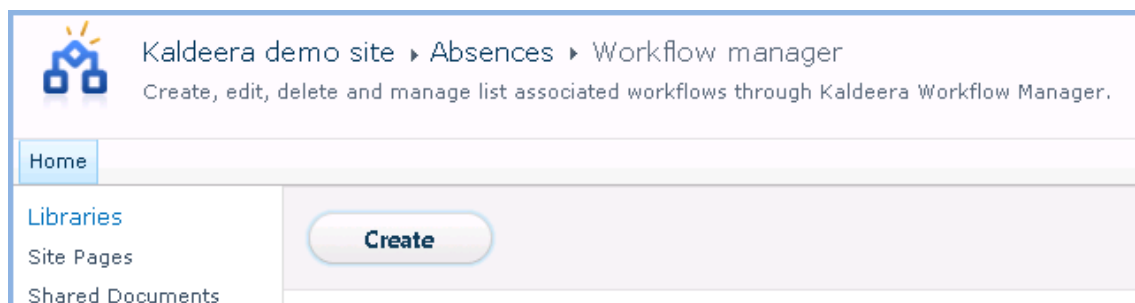
The filename title will be inherited from the title of the workflow. Click the "Save" button then choose a location for the file.

1.2.2 Importing a workflow

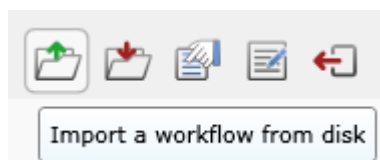
To import a workflow to a library or list, navigate to the library or list in question. You will then need to create a workflow.

The way to create a workflow:

First, navigate to a library or list then click the "Settings" button > Then select the "Manage Kaldeera Workflows" option > The Workflow Gallery page will load > You can then select "Create" from near the top of the page.



Now click the "Import" button at the top of the design canvas.



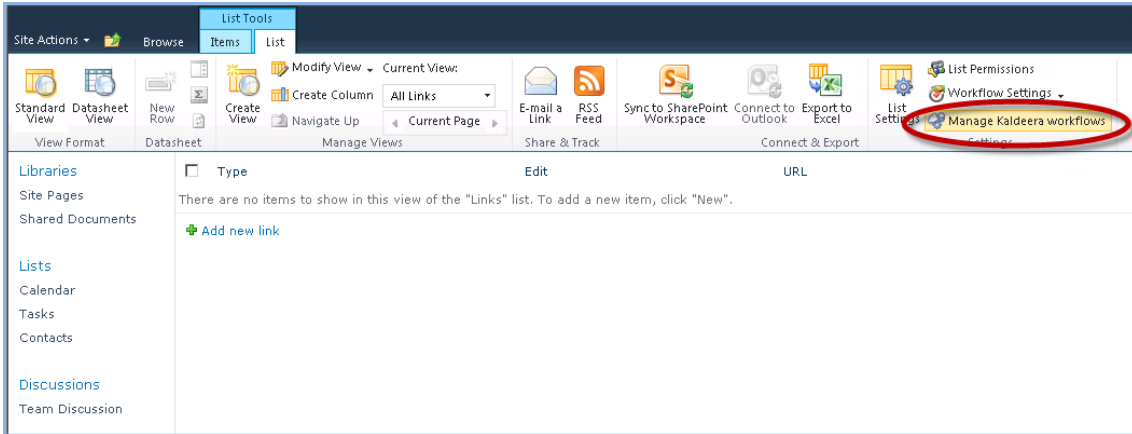
Locate the file using the file system then click the "Import" button.

Note: Only workflows created by Kaldeera Workflow Designer can be imported.

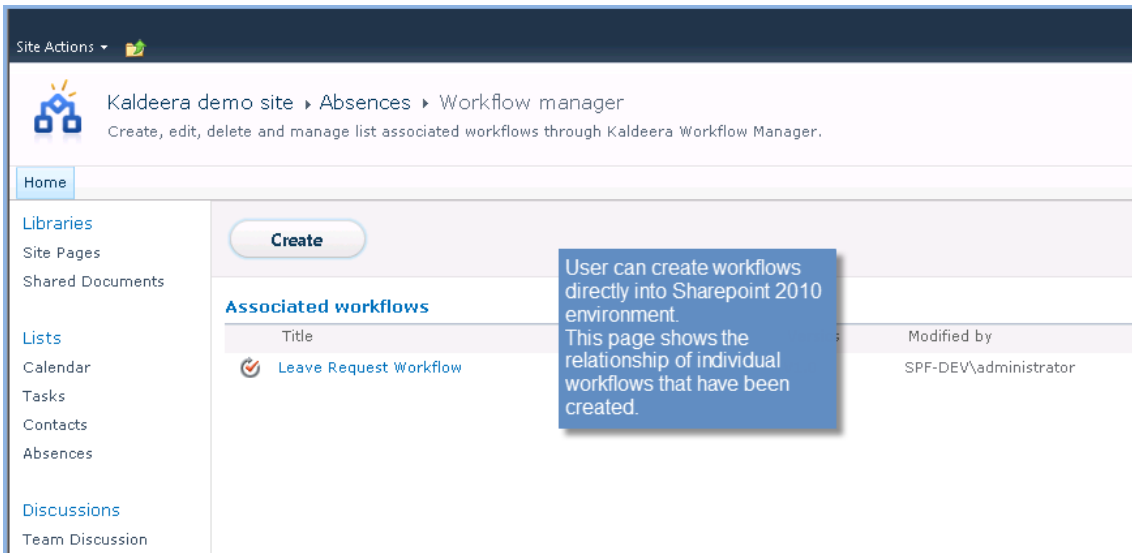
The previously designed workflow, with all its settings should now be displayed on the design canvas. All actions can be re-configured to your specifications.

1.2.3 Managing Workflows

Each list or library in a site enabled with Kaldeera Workflow Designer will have one additional item in its list settings toolbar as shown below. The button in the toolbar links to the "Workflow Manager" page for that specific list or library.



When the "Workflow Manager" page loads you will see a list of all the workflows that belong to the current list.

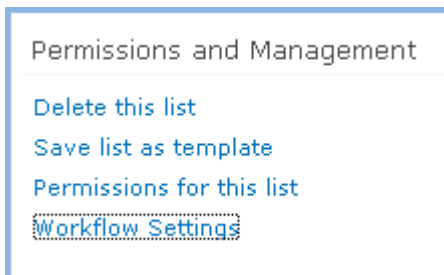


From here there are three options:

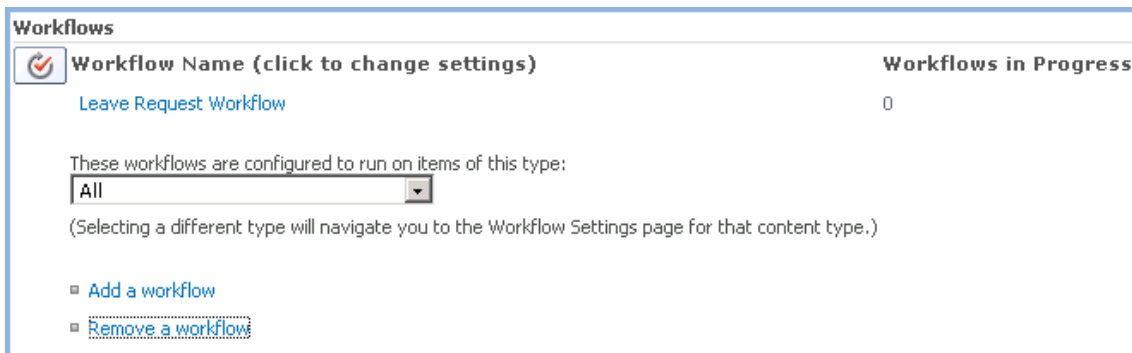
- **Create a new workflow:** click on the "Create" button to create a new workflow.
- **Edit an existing workflow:** click on the linked name of an existing workflow in order to open it for editing in the Kaldeera workflow designer.
- **Delete an existing workflow:** click on the "Delete" link next to the workflow to be deleted. After confirming the deletion the workflow will be permanently removed from the system.

1.2.4 Un-publishing a Workflow

If you wish to un-publish a workflow this can be done within SharePoint itself. Open the Library/List Settings page and select the "Workflow settings" option in the menu.



A list of all published versions of the active workflows within the list or library with the number of currently running workflows will be displayed. To remove one or more workflows from the "Published" list, click on the "Remove a workflow" link.



From the "Remove workflows" page, select the "Remove" radio button to the right of the workflow title to remove it. Note that when removing a workflow here it is not removed from the system, only from the list of workflows available to users (published workflows).

Workflows	Workflow	Instances	Allow	No New Instances	Remove
Specify workflows to remove from this list. You can optionally let currently running workflows finish.	Leave Request Workflow	0	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

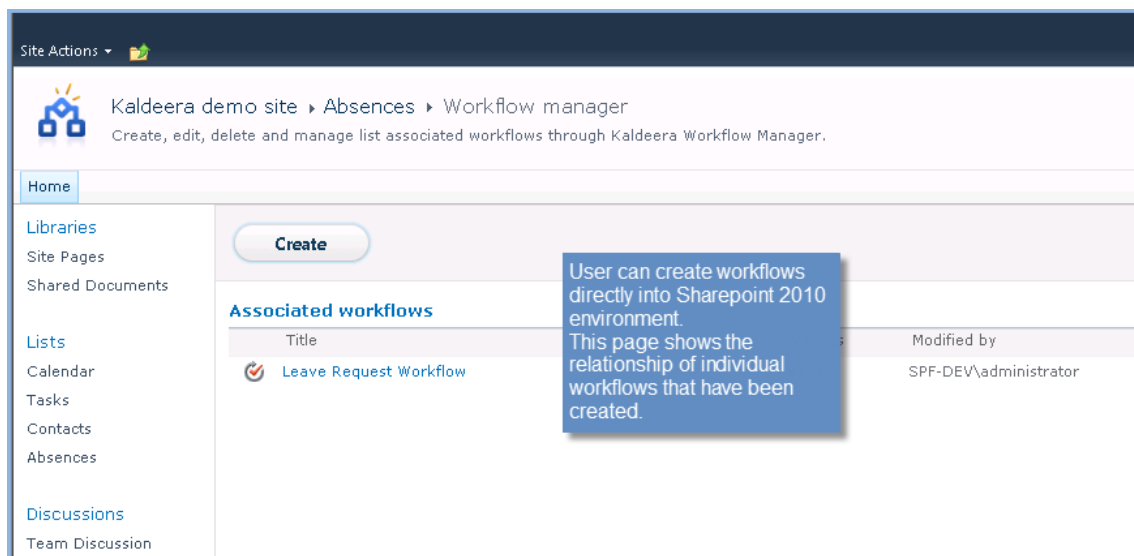
1.3 Opening and saving workflows

This help topic describes how to open and save workflows. For information about making a workflow available to users in libraries and lists, please refer to the Publishing a workflow help page.

1.3.1 Opening a Workflow

The way to open a workflow is to use the "Manage Kaldeera Workflows" link provided from the SharePoint library or list view.

When the "Workflow Manager" page loads you will see a list of all the workflows that belong to the current list.



Click on the linked name of an existing workflow in order to open it for editing in the Kaldeera workflow designer.

1.3.2 Saving a Workflow

You can save a workflow at any point in the design process and edit it again at a later time. To save a workflow, click the "Save" button at the top of the design canvas. If this is the first time you have saved the workflow, a pop-up box will appear, asking you to enter a Name (which is required), a description for the workflow and a Workflow association (which is required):

WORKFLOW SETTINGS

General settings

Name ←

New Workflow Name

Description

Workflow association ←

Allow this workflow to be manually started from an item

Automatically start this workflow when a new item is created

Automatically start this workflow whenever an item is changed

← Required field

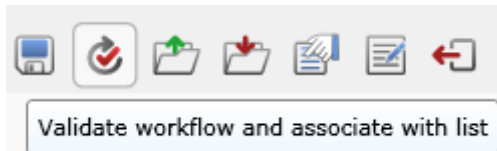
Close

Click the "Close" button when you are ready. A progress pointer will appear. When the workflow has been saved, it will change and you can click the "Exit" button at the top of the design canvas.

1.4 Publishing a workflow

Before a workflow becomes available to users within SharePoint lists and libraries it must be published.

Once you are ready with your workflow select the "Publish" option from the Actions menu on the Kaldeera Workflow design canvas. The application will then validate the workflow and publish it, ready for SharePoint.



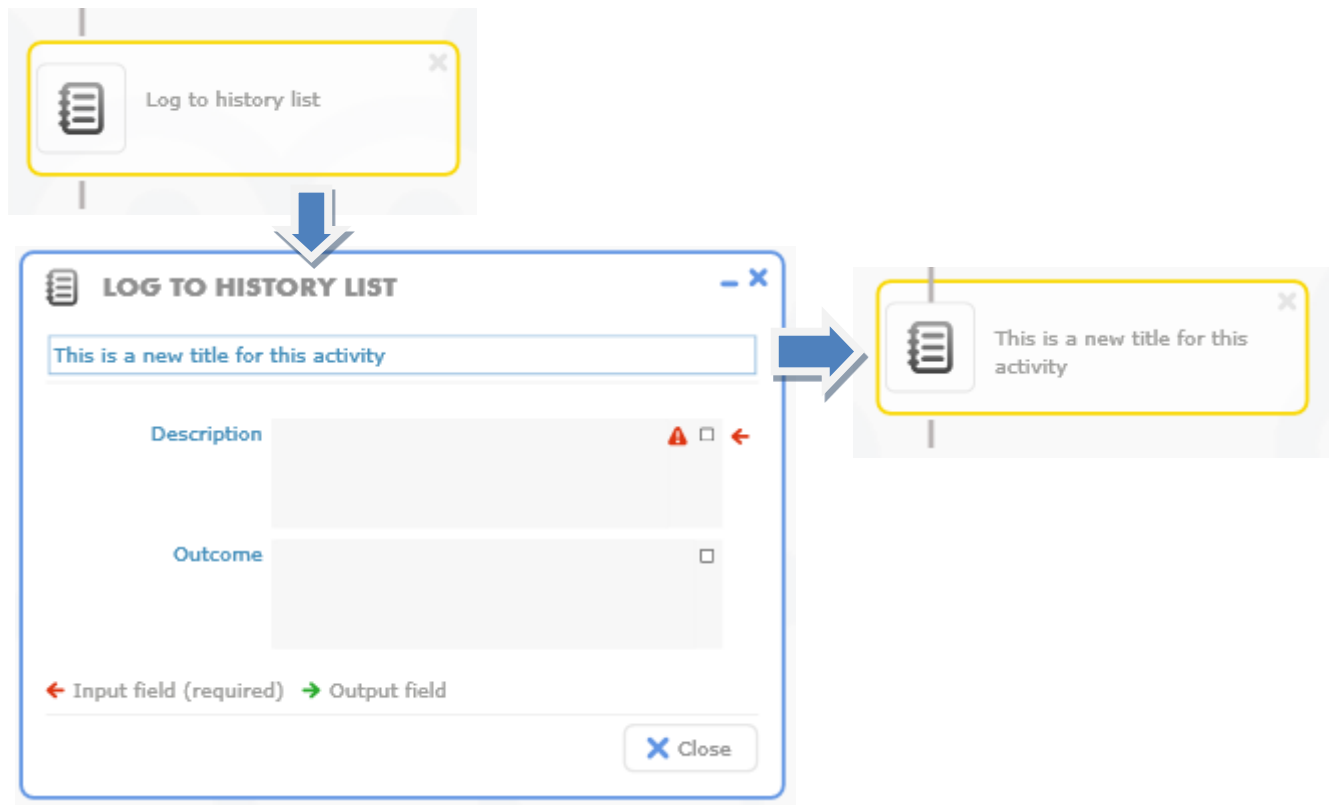
This process of validation and publish may take a few seconds before you will see the success message. When the workflow is published it can be managed additionally by the standard SharePoint tools as well within the "Workflow Manager" page.

If there are errors in the workflow, the workflow will not publish.

1.5 Set Activity Label

You can configure the text displayed around an activity by double-clicking in the "Activity".

(Shortcut: F2)



You can now configure the action title.

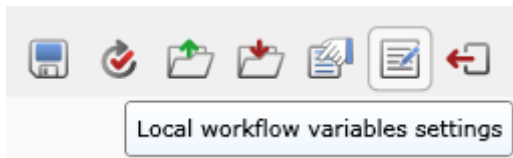
1.6 Workflow Variables

At first glance workflow variables may not seem to be needed much in most workflows. In truth, for basic approval workflows built ad-hoc by users as required they are not needed often. However, as a workflow gets more complicated and the need for implementing complex business rules and logic arises, the advanced, technically minded user will find them usefully.

Some examples of when workflow variables are useful:

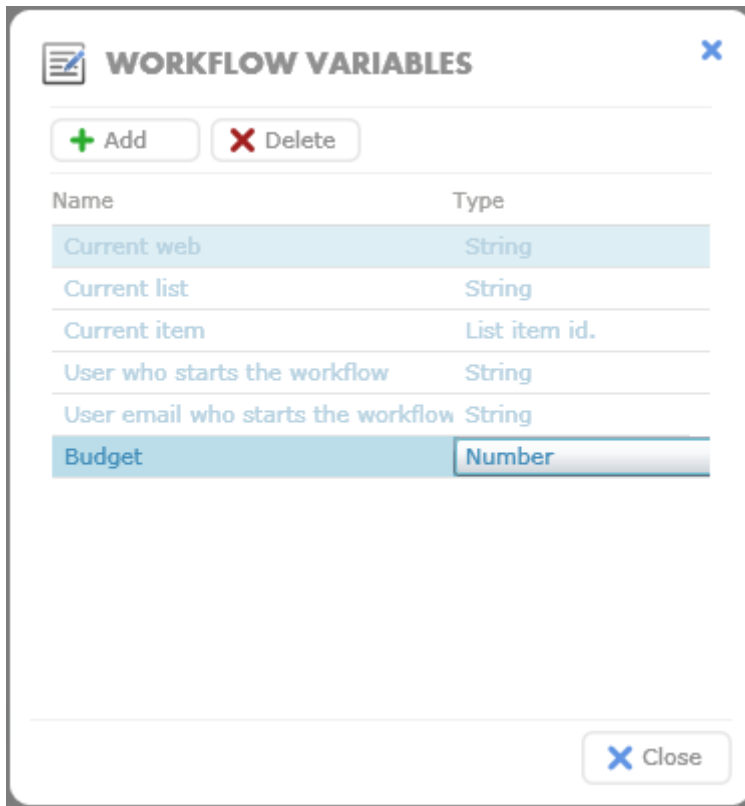
- You develop the workflow in a development environment for deployment to testing and production environments. So that values in the workflow are not hard coded and hence manually updated during deployment workflow variables can be used to load values from other lists via lookups used for environment specific configuration. E.g. a URL to be used in an email will be different for each environment; this can be sourced at runtime from a configuration list within each environment using the "Set Workflow Variable" activity.
- A workflow may require a creation of another list item that you will need to query later using a lookup or delete automatically depending on further logic in a workflow. E.g. a new report requires that meeting is organized, in the meantime an administrator as part of the same workflow has rejected the report hence the event needs to be deleted.

It is not always appropriate or possible to store some of these values as Meta data of the item attached to the workflow. To provide the means and flexibility to handle these kinds of scenarios Kaldeera provides workflow variables.



1.6.1 Managing Workflow Variables

In order to create or delete a variable attached to a workflow, select the "Variables" menu option.



This will open a popup as shown below with a list of all the current variables that are configured with their type (String, Number, Boolean, Date/Time and List Item ID). To delete an existing variable select list item and click on the "Delete" button. To edit an existing variable, select list item and double-click.

To create an item, click on the "Add ..." button. A new item will be displayed to allow you configure the name and type of your new variable.



Please note that throughout Kaldeera Workflow, actions that refer to workflow variables are restricted so that items of different types cannot be intermixed. Hence:

- when creating a list item only a List Item ID variable can be used to store the ID of the new item
- a conditional action that is comparing the created date can only use a DateTime variable


1.7 Workflow Start Options

The "Workflow start options" determine how a workflow can be started and are accessed by clicking the "Settings" button above the design canvas.

The options (including two automatic) provided are:


WORKFLOW SETTINGS

General settings

Name 

New Workflow Name


Description

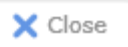
Workflow association 

Allow this workflow to be manually started from an item

Automatically start this workflow when a new item is created

Automatically start this workflow whenever an item is changed

 Required field



- **Allow this workflow to be manually started from an item:** This option will allow to any user with workflow rights to start the workflow manually.
- **Automatically start this workflow when a new item is created:** when a library or list item is created or uploaded, all workflows in the library or list with this option enabled will start.
- **Automatically start this workflow whenever an item is changed:** when a library or list item is modified, all workflows in the library or list with this option enabled will start. Checking-in a document in any way will not trigger a workflow to start.

Note: Workflows are associated with a library or a list. Folders and sub-folders within libraries are subject to the same workflows as the parent library. Therefore, if you set a workflow to start when items are created or modified, any item, regardless of how many folders or sub-folders down it is stored, will trigger all the workflows that are set to start automatically. That behavior is governed by SharePoint.

1.8 Security Settings

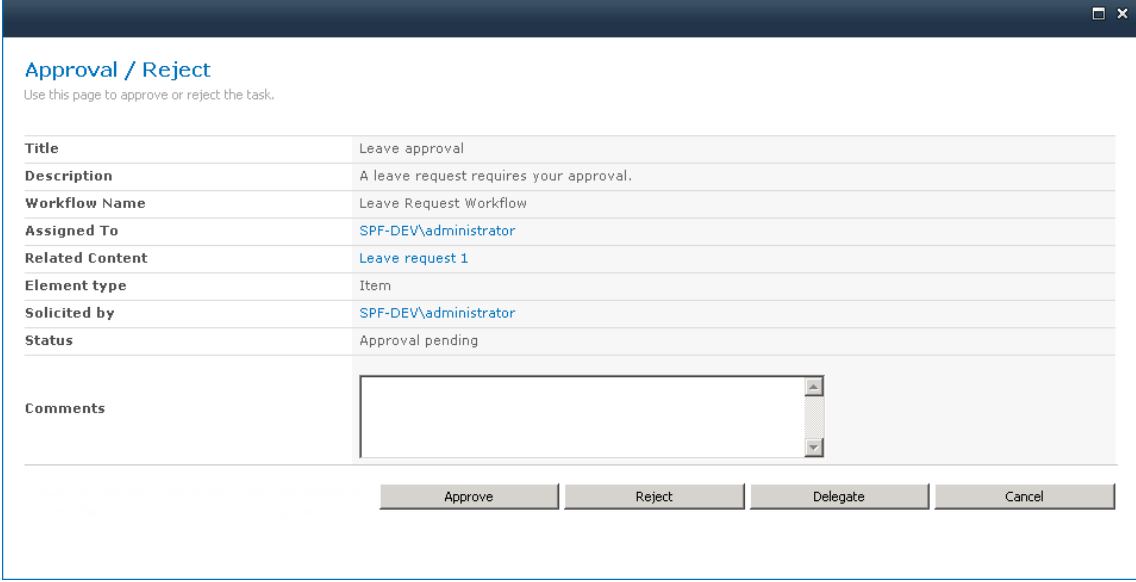
According to how a user is required to interact with Kaldeera Workflow Designer there are different security considerations to be made. The table below outlines the minimum permissions required to perform the actions described. In general, the runtime permissions can be inherited from the site or the parent site but must be the effective permissions for the given user at the list level.

Kaldeera Role	Required "SharePoint Permission Level"	Note
Approver/Reviewer	Contribute (at the item level at least)	This role includes all users who will be able to perform their assigned human task as part of the workflow from the SharePoint site. Users may be assigned tasks even without these permissions.
Workflow Designer	Design	This role includes all users who are responsible for creating and maintaining workflows. With these permissions the user can use the Kaldeera Workflow Designer as well as the related tools and pages.
Site Administrator	Full Control (on the site)	This role is responsible for activating and configuring the site level Kaldeera Workflow settings from the "Site Settings" page.
Server Administrator	Full Control (on the central administration site)	This role is responsible for the installation and the server level configuration of Kaldeera Workflow.
Workflow user	Contribute	Can start workflows, view history and progress reports.

1.9 Approving and Rejecting Human Tasks

During runtime, when a human task is created as part of a workflow, the configured users will be processed, tasks will be assigned and the notification message/s sent.

To process an assigned task, click the item menu and select "Edit Item" option. This will open the "Approval/ Reject" page ready for the user's response.



Approval / Reject
Use this page to approve or reject the task.

Title	Leave approval
Description	A leave request requires your approval.
Workflow Name	Leave Request Workflow
Assigned To	SPF-DEV\administrator
Related Content	Leave request 1
Element type	Item
Solicited by	SPF-DEV\administrator
Status	Approval pending

Comments


Approve Reject Delegate Cancel

1.9.1 Fields in the "Approve Reject" page

- **Title:** the title of the workflow task assigned to me.
- **Description:** this is the description of the workflow.
- **Workflow:** the workflow's name.
- **Assigned To:** the person who the workflow's task is assigned.
- **Related element:** to view the full details of the item click the hyperlink.
- **Element Type:** type of the related element (document, list,).
- **Solicited by:** the person who has solicited the task approval.
- **Status:** when the task has been generated by the "Get approval from user or group" action, the user can choose to approve or reject the item in the workflow. The selection made will consequently determine the path followed by the workflow. Depending on the configured workflow action, the user may be given the option of delegating the task to another user.
- **Comments:** use this field to enter any comments about why the item was approved or rejected.

1.10 Delegating Approval Tasks

Delegation is processed from the Approval or Review task pages. When the option is selected the delegation screen is displayed.

Field	Value
Title	Leave approval
Description	A leave request requires your approval.
Workflow Name	Leave Request Workflow
Assigned To	SPF-DEV\administrator
Related Content	Leave request 1
Element type	Item
Solicited by	SPF-DEV\administrator
Status	Approval pending
Delegate to	<input type="text"/> 
Comments	<input type="text"/>

1.10.1 Delegate

The mandatory delegate field is used to specify the user to assign the selected task to. To select a user, click on the address book icon on the right to see the Select People or Group popup.

After the form is filled in and submitted, the selected task will be reassigned to this selected user.

Note: View topic "Get approval from user or group > Group (SharePoint membership group – only delegation)" to assign valid users.

1.10.2 Comments

The comments field is not mandatory and allows you to provide instructions to the new user. This text is actually appended to the approval required notification that is sent to the new user.

1.11 Starting a workflow

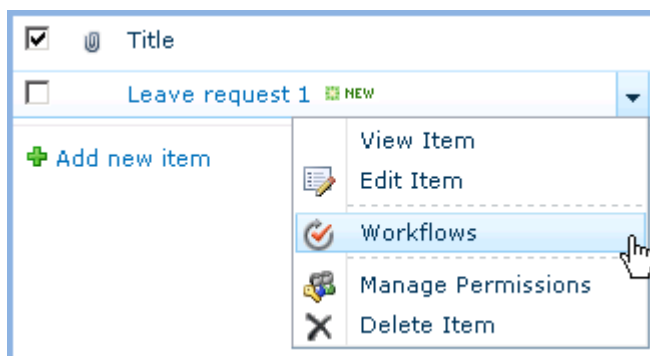
There are three ways to start a workflow, depending on how the workflow is configured.

- **Start manually:** Workflows with this option enabled can be started manually from the workflows section in the item toolbar.
- **Start when items are created:** when a library or list item is created or uploaded, all workflows in the library or list with this option enabled will start.
- **Start when items are modified:** when a library or list item is modified, all workflows in the library or list with this option enabled will start.

Note: Workflows are associated with a library or a list. Folders and sub-folders within libraries are subject to the same workflows as the parent library. Therefore, if you set a workflow to start when items are created or modified, any item, regardless of how many folders or sub-folders down it is stored, will trigger all the workflows that are set to start automatically. That behavior is governed by SharePoint.


1.11.1 Starting a Workflow Manually

To start a workflow manually, navigate to the list or library that contains the item you wish to push through a workflow. Locate the item then activate the item's drop-down menu then select the "workflows" link.



The "Start a New Workflow" page will load. A list of workflows that have been published and consequently available for use in the library or list is displayed. To start a workflow, click its hyperlink.

Start a New Workflow

 [Leave Request Workflow](#)

Workflows

Select a workflow for more details on the current status or history. [Show my workflows only.](#)

Name	Started	Ended	Status
------	---------	-------	--------

Running Workflows

There are no currently running workflows on this item.

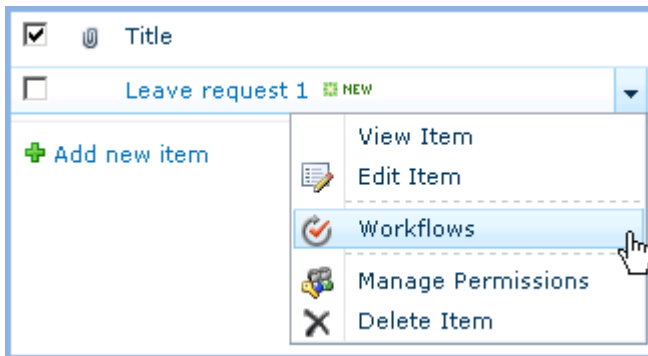
Completed Workflows

There are no completed workflows on this item.

You will be returned to the library or list and the progress of the selected workflow will be displayed in-line with the item.

1.12 Viewing workflow history

To view the item's workflow history, locate the item in its library or list, activate its drop-down then click the "Workflows" link.



The Workflow Status page will be loaded. It shows workflows that are running, completed, cancelled and with errors. Click on the title of the workflow you wish to check for more information. In the "Completed Workflows" section there could be multiple identical titles, which will mean the item has been through the same workflow a number of times before. Ensure that you choose the relevant workflow instance. The easiest way is to choose by date.

Start a New Workflow

There are no workflows currently available to start on this item.

Workflows

Select a workflow for more details on the current status or history. [Show my workflows only.](#)

Name	Started	Ended	Status
Running Workflows			
Leave Request Workflow	5/20/2011 7:48 AM		In Progress
Completed Workflows			
There are no completed workflows on this item.			

To access the Workflow History, click on the title of the workflow.

The Workflow History page will load.

The screenshot shows a web interface for a workflow. It is divided into three main sections: Workflow Information, Tasks, and Workflow History.

Workflow Information

Initiator: SPF-DEV\administrator Item: Leave request 1
Started: 5/20/2011 8:01 AM Status: In Progress
Last run: 5/20/2011 8:01 AM

If an error occurs or this workflow stops responding, it can be terminated. Terminating the workflow will set its status to Canceled
[Terminate this workflow now.](#)

Tasks

The following tasks have been assigned to the participants in this workflow. Click a task to edit it. You can also view these tasks in the list [Tasks](#).

<input type="checkbox"/> Assigned To	Title	Due Date	Status	Related Content	Outcome
SPF-DEV\administrator	Approval required NEW		Not Started	Leave request 1	

Workflow History

The following events have occurred in this workflow.

<input type="checkbox"/> Date Occurred	Event Type	<input type="checkbox"/> User ID	Description	Outcome
5/20/2011 8:01 AM	Comment		Leave Request	Your leave request has been received and forwarded to your Manager for review.
5/20/2011 8:01 AM	Comment		Email sent	
5/20/2011 8:01 AM	Comment	System Account	Approval pending for SPF-DEV\administrator.	

The Workflow History has two sections:

Tasks: The Action History shows every completed action associated with the workflow in order. Actions are added to the top of the list, so the first completed action is always at the bottom of the list.

Workflow History: This section shows all messages that are generated by actions in the workflow. It also shows comments made by users and messages that are programmed to appear when the "Log to history list" action is used.

2 Chapter 2: Workflow Actions

2.1 Basic activities

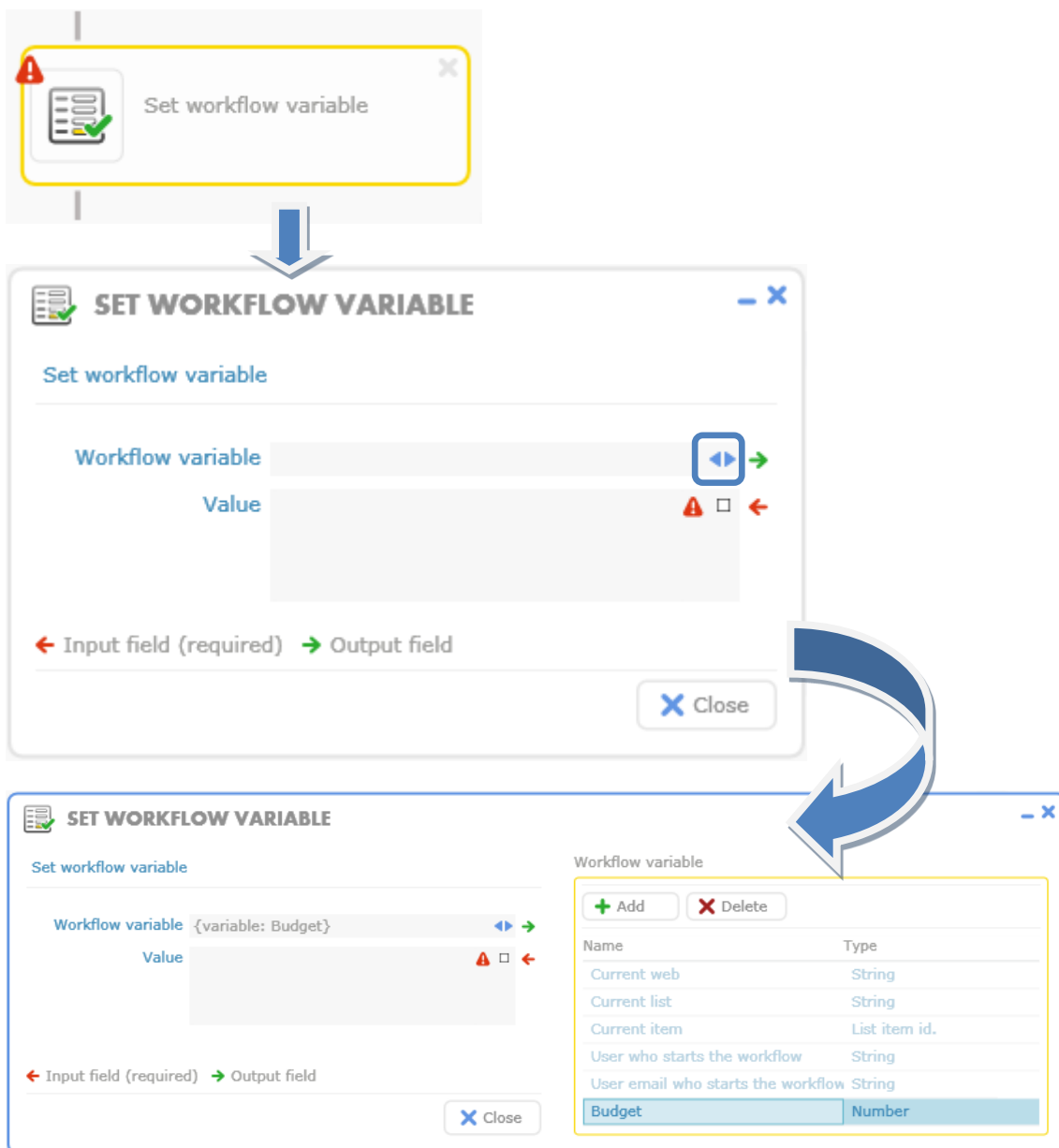
2.1.1 Set Workflow variable

This workflow action will set the value of a workflow variable.

Note: At least one workflow variable needs to be created for this action to be relevant.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

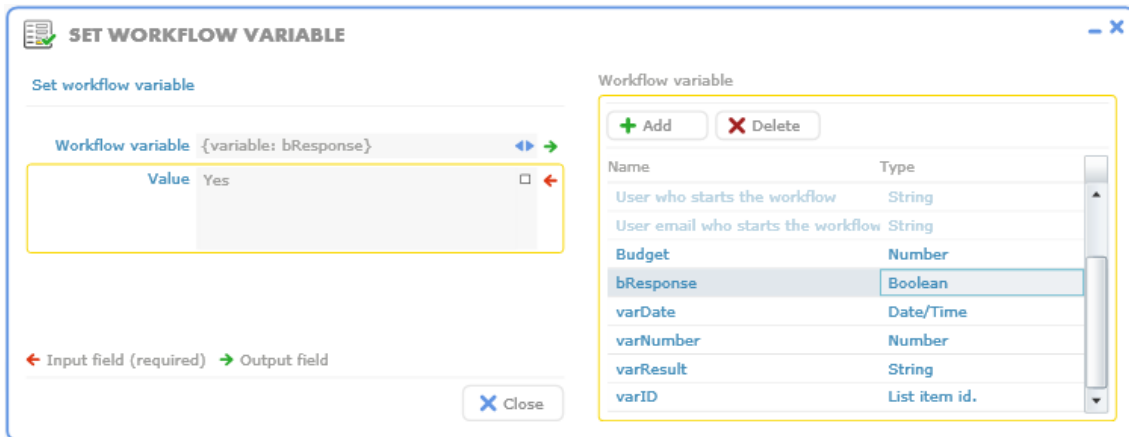
To change the settings used by the action, double-click in the "Activity" to activate a pop-up.





Options for this action

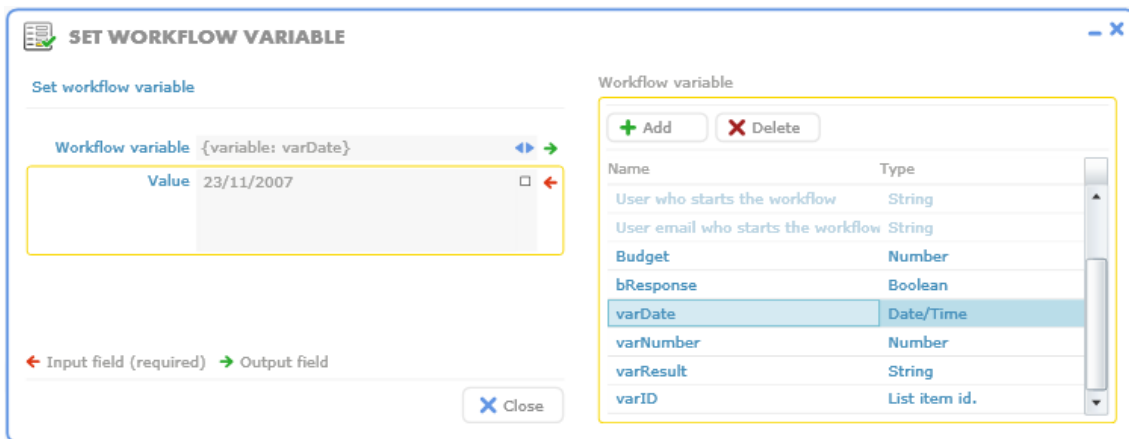
Depending on what type of workflow variable is defined, the steps to set a variable will be different. Below are the different workflow variables types and the process to set each one.


Boolean also known as Yes/No




First select the Boolean workflow variable from the list . You can then set the value to yes or no or you can use to set the value using a lookup .

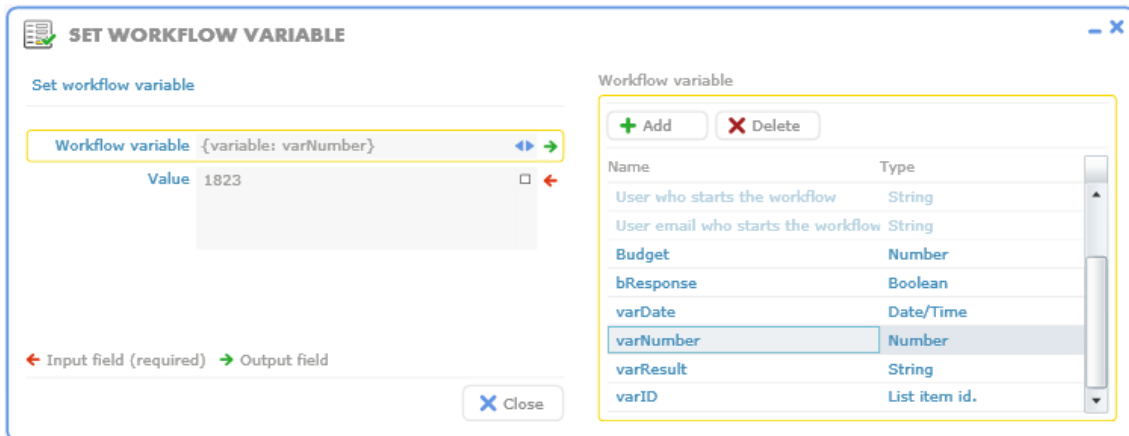
Date / Time





First select the date workflow variable from the list . You can then set the date workflow variable by:

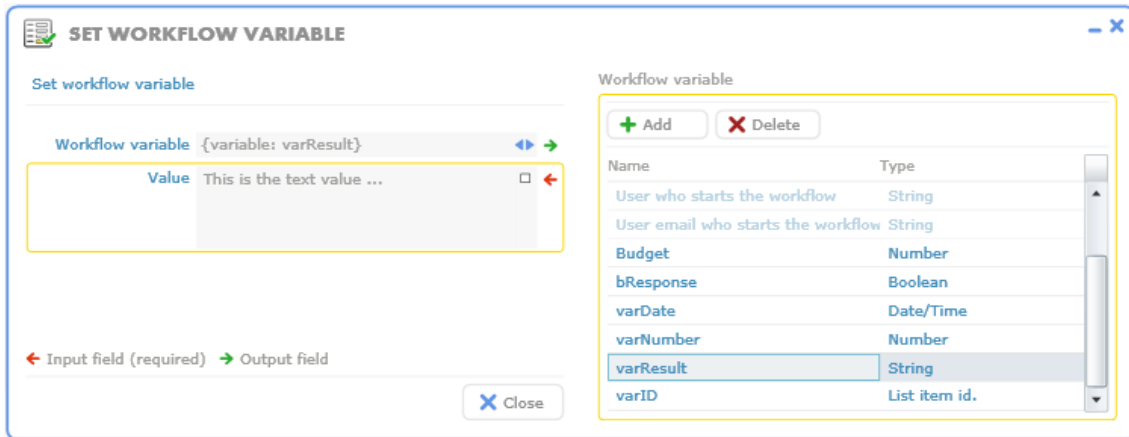
- entering the date
- using  to set the date value using a lookup



Number



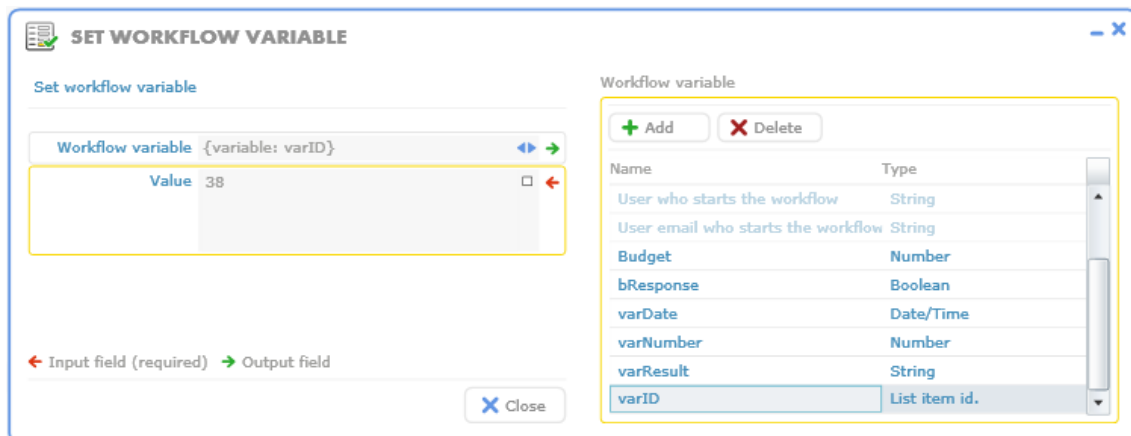
First select the number workflow variable from the list . You can then set the number workflow variable to the desired number or you can use to set the number value using a lookup 



String (also known as Text)



First select the text workflow variable from the list . You can then set the text workflow variable to your desired text or you can use to set the number value using a lookup 

2.1.1.1 List Item ID

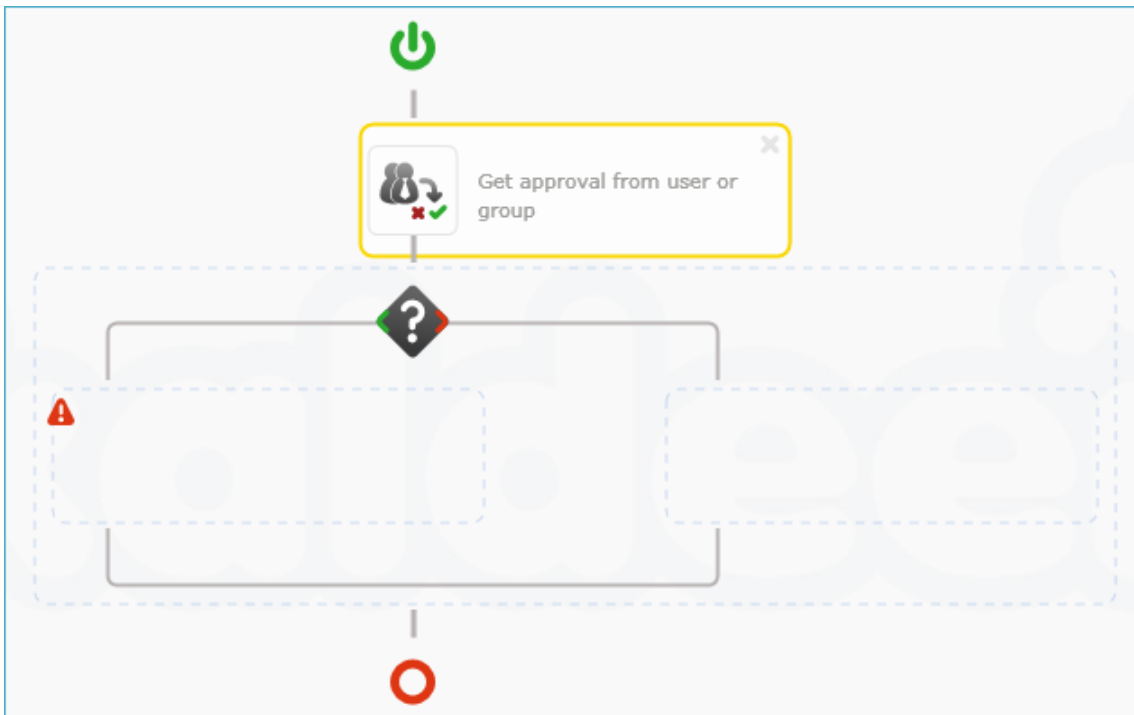


First select the List Item ID workflow variable from the list . You can then set the List Item ID workflow variable to your desired value or you can use to set the List Item ID value using a lookup 

2.1.2 Get approval from user or group

This feature allows you to request one or more users to process an approval as part of your workflow.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.



To change the settings used by the action, double-click in the “Activity”.

Options for this action

Task Title

This field allows defining the title of the task. This is the title that appears in a SharePoint task list. This field is mandatory.

Task Description

This field allows defining the task's description. This is the description that appears in a SharePoint task list. This field is mandatory.

User or Group

The user or group approvers is a mandatory field that contains all users or groups that will be assigned the approval task during the running of the published workflow.

Users can be entered directly by their username, email address or full name and will be resolved where possible against the SharePoint user list.

In the case that a group is assigned the approval task, all users in that group will receive the task but the first response will represent the whole group.

Approval task result

This field allows to store in a String (Text) workflow variable the result value for the action. This variable can be used to link the action to Conditional actions.

Comments by approver

This field allows to store in a String (Text) workflow variable the comments inserted by the approver.

User can reject the task

This field allows to the approver to reject the task. If this option is disabled the approver only will be able to accept the task (and delegate it if allowed).

User can delegate the task

This field allows to the approver to delegate the task to another user or group.

User who has been delegated the task

This field allows to store in a String (Text) workflow variable the user that performed the task.

Group (SharePoint membership group – only delegation)

This field allows selecting the users to whom the task can be delegated. Only the users in the group selected in this field can be selected for delegation.

Leave this field empty if all users can be selected for delegation.

2.1.3 Log to history list

This workflow action will log a user-defined entry into the workflow history list.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity".

Options for this action

LOG TO HISTORY LIST

Log to history list

Description This is the approval result: {variable: varResult} ←

Outcome

← Input field (required) → Output field

Close

You can add a log in the history list by clicking in the grey text box and typing your message. You can also include references from the list the workflow is being used in by clicking on

When you've finished the message, click "Close" at the bottom of the dialog box.

For details on the SharePoint History List, please refer to the SharePoint Help Pages.

If the mandatory fields within the "Log to history list" workflow action are not set, a warning message will be shown.

2.1.4 Set approval moderation status

The "Set approval moderation status" action is used by the workflow to update the built-in SharePoint approval status of the current item.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity".

Options for this action


The screenshot shows a configuration dialog box titled "SET APPROVAL MODERATION STATUS". Inside the dialog, there is a section titled "Set approval moderation status". Below this title, there are two main fields: "Status" and "Comments". The "Status" field is a dropdown menu currently set to "Approved", with a red arrow icon to its right. The "Comments" field is a text area with a small square icon to its right. At the bottom left of the dialog, there is a legend: a red arrow pointing left for "Input field (required)" and a green arrow pointing right for "Output field". The "Status" field has a red arrow, indicating it is an input field. The "Comments" field has a green arrow, indicating it is an output field. A "Close" button with a blue 'X' icon is located at the bottom right of the dialog.

Status

This mandatory field determines the status attributed to the item.

This is a close-up of the "Status" dropdown menu. The menu is open, showing three options: "Approved", "Denied", and "Pending". The "Approved" option is currently selected and highlighted in blue. Each option has a small square icon to its right. The dropdown is highlighted with a yellow border.

Comments

The comments entered here will be associated with the update to the status of the item. To insert references values to be evaluated at runtime, click on the button 

List Settings

In order for this action to work properly, the library or list to which it is attached must have SharePoint "Content approval" activated. To do this you will need to access the "List Settings" button in the list options toolbar. Then click on the "Versioning settings" link under the "General Settings" section.

<p>Content Approval</p> <p>Specify whether new items or changes to existing items should remain in a draft state until they have been approved. Learn about requiring approval.</p>	<p>Require content approval for submitted items?</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Require content approval for submitted items: Yes</p>
--	---

2.1.5 Send e-mail

This workflow action will send customizable workflow notifications to approvers via e-mail.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity".

Options for this action

SEND EMAIL

Send email

To ⚠️ □ ←

CC □

Subject ⚠️ □ ←


Urgent □ ←

Message body ⚠️ □ ←


← Input field (required) → Output field

Close


To

The "To" field sets the primary user(s) who will receive the customized notification and is a mandatory field. You can add the primary user(s) by clicking in the grey text box and typing the e-mail account. You can also include references from the list the workflow is being used in by clicking on the button 

CC

The "CC" field sets auxiliary user(s) who will receive the customized notification and is an optional field. You can add the auxiliary user(s) by clicking in the grey text box and typing the e-mail account. You can also include references from the list the workflow is being used in by clicking on the button 


Subject

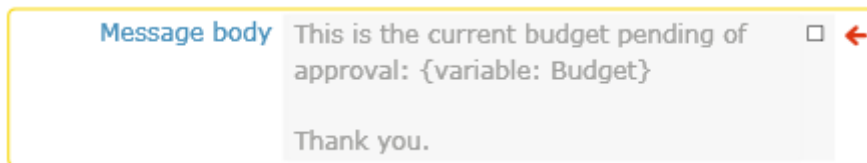
The "Subject" is the header or title of the notification being sent and is a mandatory field. It will appear as the header or title of the e-mail. You can either manually type the Subject of the notification or by clicking on the button , you are able set the Subject to a field within the list or library where the workflow is being used.

Urgent

A value to set e-mail's priority.

Message Body

The "Message Body" is the area in which the notification message should be written. By clicking on the reference button , you are able to include information from the list or library item that is being passed through the workflow in the Notification Body.



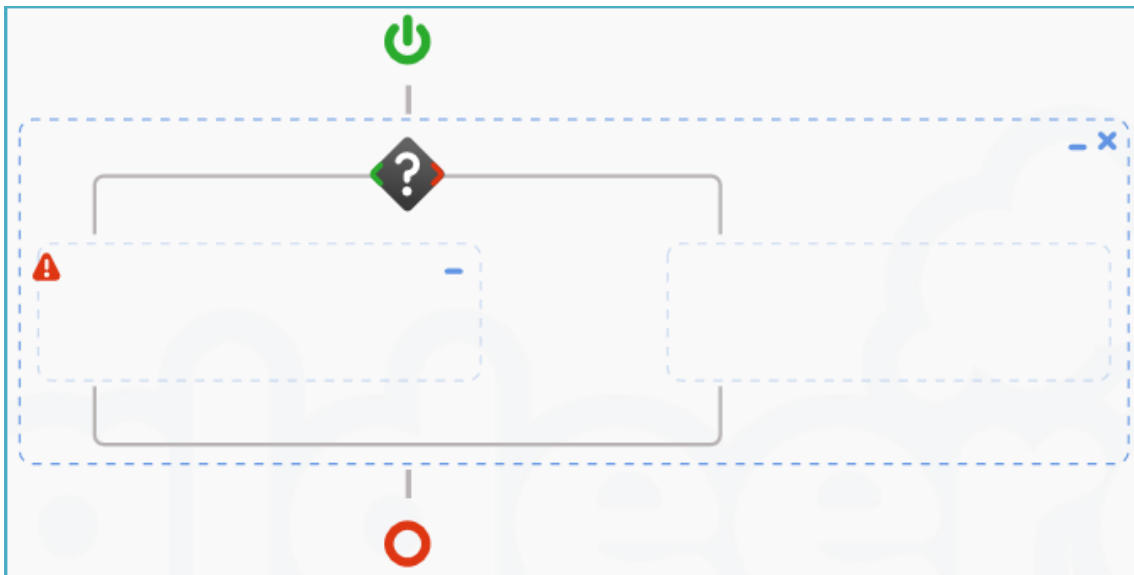
2.2 Control activities

2.2.1 Conditional

The action "Conditional" allow you to process logic within the workflow that will run when a certain condition evaluates to true or false.

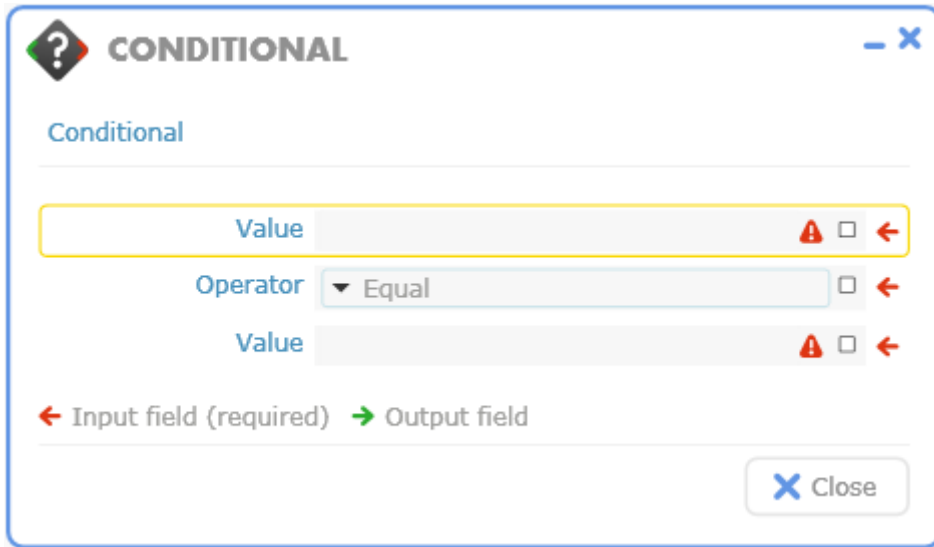
To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity"




After inserting the action you will note that there are 2 branches coming off the shape. To the left is the "yes" branch which is the path followed if the condition evaluates to true while to the right is the branch followed when it is false.

Options for this action



Value

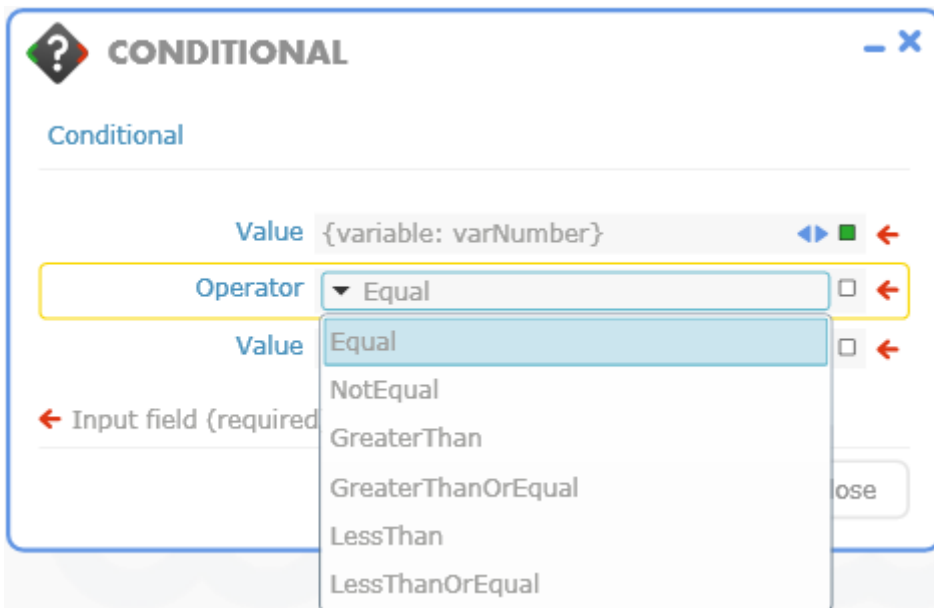
The first “Value” field allows setting the first value to evaluate in the condition activity. You can set the field to your desired value or you can use to set the value using a lookup 

Operator

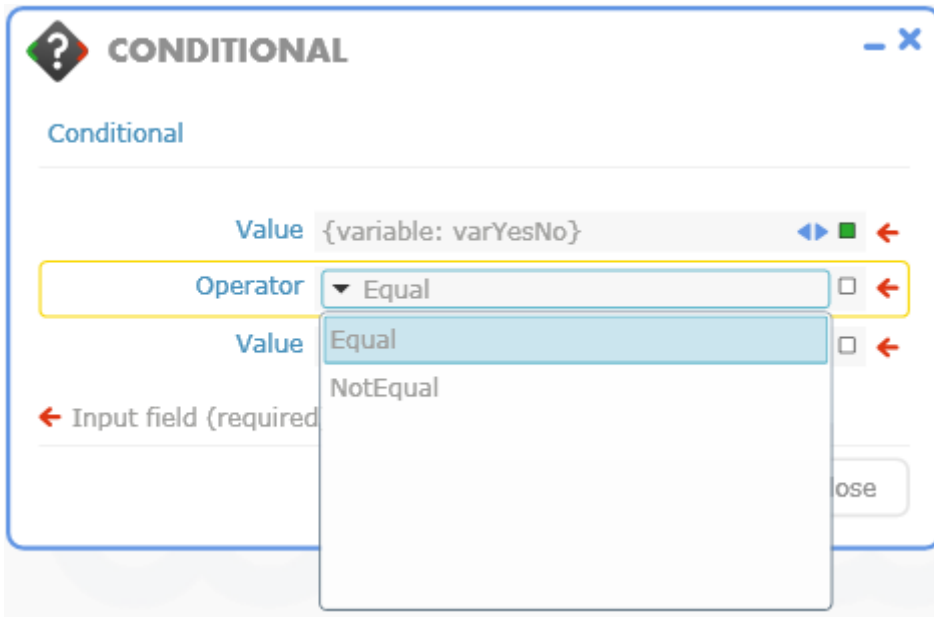
The options within this condition are quite extensive as you can use equals, not equals to, greater than, less than, is empty, contains and regular expressions, among others.

Condition types depend on the value's type:

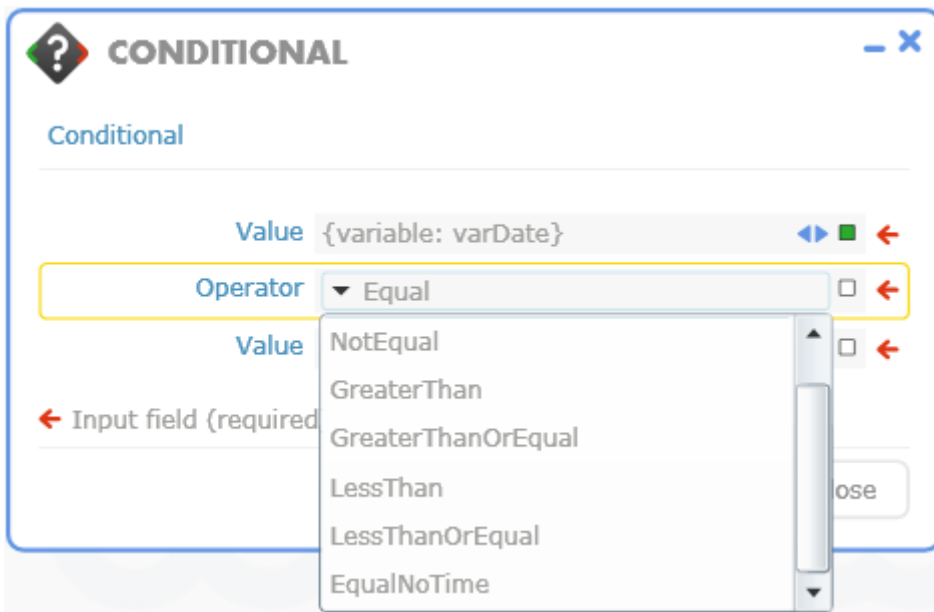
Number or List Item ID



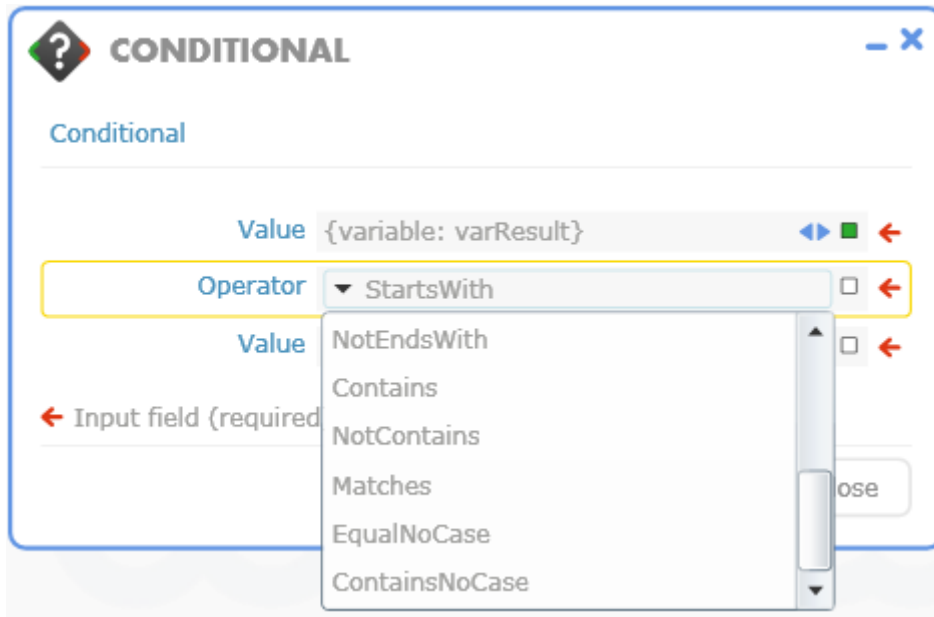
Boolean




Date/Time



String



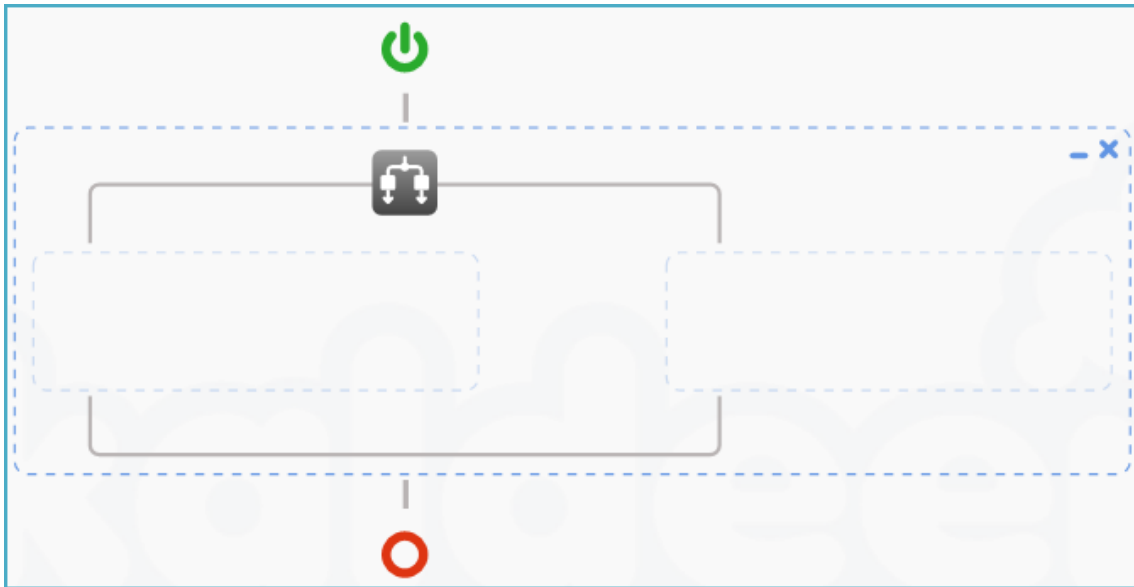
Value

The second “Value” field allows setting the second value to evaluate in the condition activity. You can set the field to your desired value or you can use to set the value using a lookup 

2.2.2 Parallel

(* This topic applies to Enterprise Edition only)

This workflow action allows you to run at least two workflow actions simultaneously.



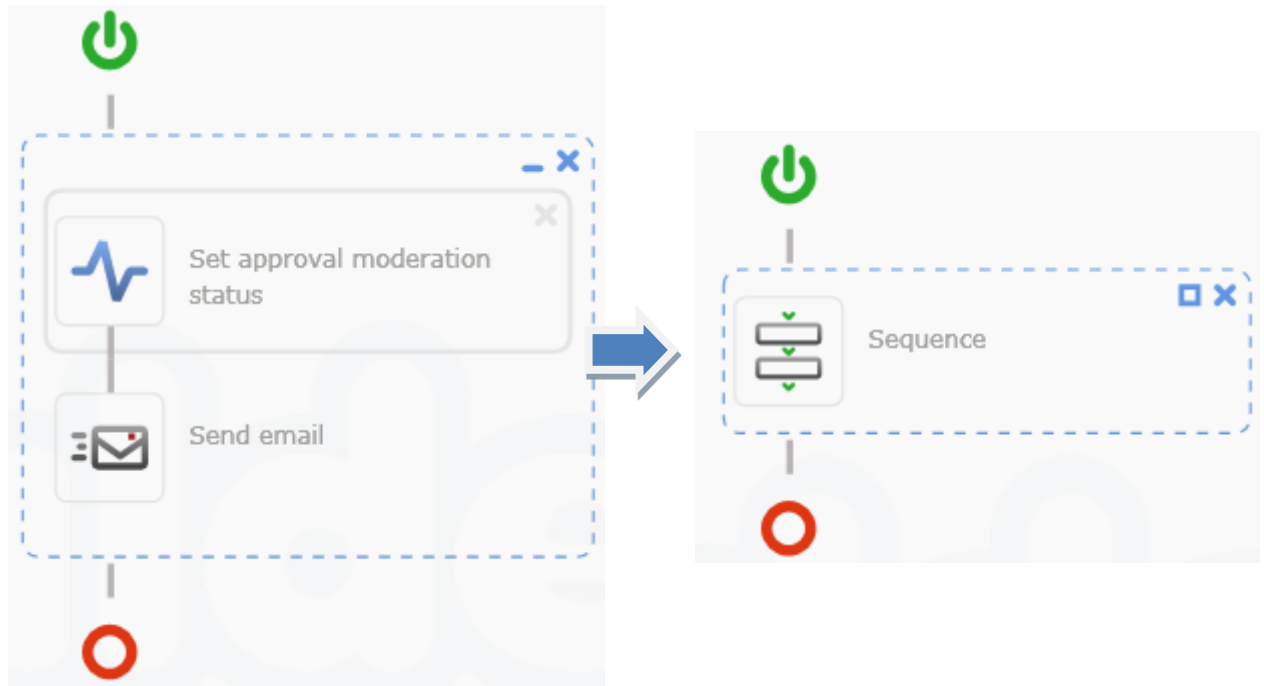
To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

There is no configuration required for this workflow action. However, it is important to note that the workflow will not continue until all workflow paths have been completed.


2.2.3 Sequence

(* This topic applies to Enterprise Edition only)

The "Sequence" action is useful for users who create numerous workflows. Those users who find they are creating the same set of actions in the same sequence repeatedly can choose to create these sets of actions as a Sequence, for better viewing of the current workflow.



To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

There is no configuration required for this workflow action. However, it is important to note that the sequence activities will not disappear until click on the "minimize" button  to collapse them.

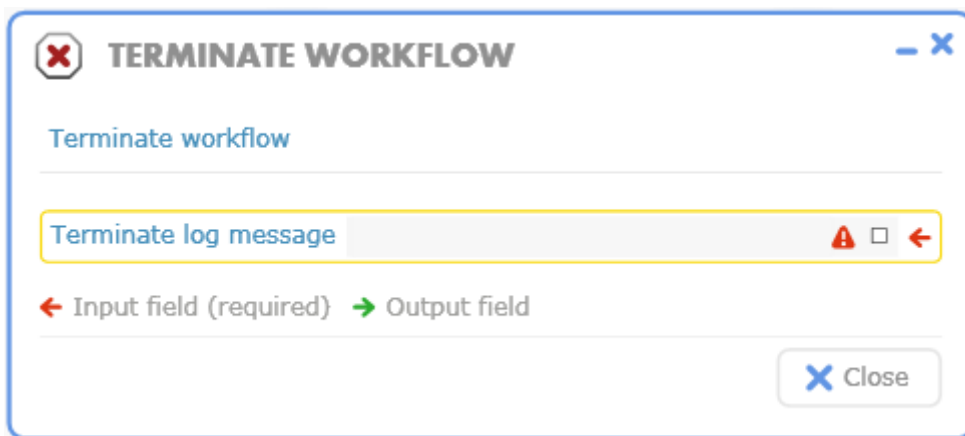
2.2.4 Terminate workflow

This workflow action will terminate the workflow and if included, will log a user defined message in the history list.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity"

There is one mandatory field to complete in this workflow action to include a message in the history list. To do this, simply click in the grey text box and type your message.



When you've finished the message, click "Close" at the bottom of the dialog box.

2.2.5 Pause for duration

(* This topic applies to Enterprise Edition only)

The "Pause for duration" action allows the workflow to make a pause for the specified duration.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity"

Options for this action

PAUSE FOR DURATION

Pause for duration

Days 0 ←

Hours 8 ←

Minutes 0 ←

← Input field (required) → Output field

Close

Days

A mandatory field that represents the days that the workflow will be paused.

Hours

A mandatory field that represents the hours that the workflow will be paused.

Minutes

A mandatory field that represents the minutes that the workflow will be paused.

2.2.6 Wait for field change in current item

(* This topic applies to Enterprise Edition only)

The "Wait for field change in current item" action allows the workflow to make a pause until a certain condition evaluates to true.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity"

Options for this action

Field

A mandatory parameter to select the field to evaluate in the condition.


Operator

The options within this condition are quite extensive as you can use equals, not equals to, greater than, less than, is empty, contains and regular expressions, among others.

Condition types depend on the field's type:

- Number or List Item ID
- Boolean
- Date/ Time
- String

Value

The "Value" field allows setting the value to evaluate in this activity. You can set the field to your desired value or you can use to set the value using a lookup 

2.3 Integration

2.3.1 Create Query to List

(* This topic applies to Enterprise Edition only)

The “Create Query to List” action allows for list item data queries and stores the results in a workflow variable (XML format), within the current site collection. The action performs a CAML site data query.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the “Activity”

Options for this action

CREATE QUERY TO LIST

Create Query to List

Web {variable: Current web}

List {variable: Current list}

Query <Where>
<Or>
<And>
<Eq>
<FieldRef Name="Column1"/>
<Value Type="Text">
Value1

Xml Result

← Input field (required) → Output field

Close

Web

The “Web” is the site that will contain the list data to query and is a mandatory field. The Source Web is automatically set to the site you are within at the moment (<Current Web>).


A site list should be visible that allows you to select the location where you would like to define the site.

List

The "List" is the list that will contain the list data to query and is a mandatory field. The Source List is automatically set to the site you are within at the moment (<Current List>).

A list should be visible that allows you to select the location where you would like to define the list.

Query

The "Query" contains the script (CAML) to build the query. You can enter information manually in the grey text box or you can use the lookup feature by clicking on .

This field is mandatory.

XML Result

The workflow variable to store the values selected from the query. It specifies where to store the resulting text (XML format).

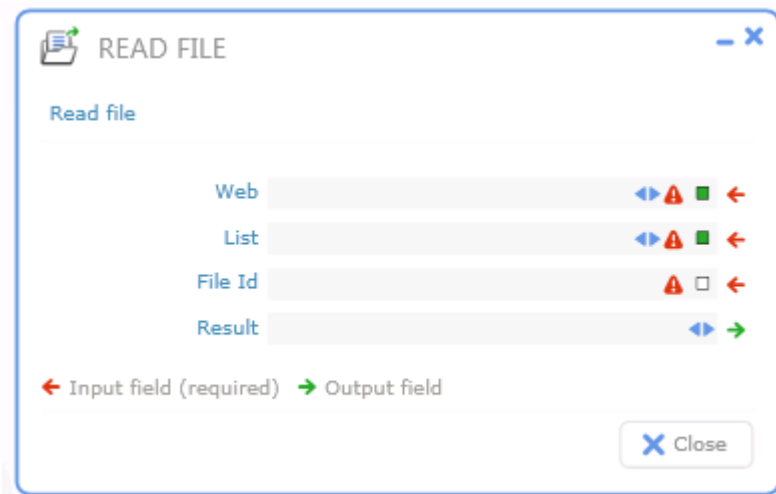
2.3.2 Read File

The “Read File” action allow to read a text file (text, xml, InfoPath) stored in a SharePoint list. Then the file can be used with other actions like “xsl Transform”.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the “Activity”

Options for this action



Web

The “Web” property is the site that will contain the data retrieved and is a mandatory field. The Source Web is automatically set to the site you are within at the moment (<Current Web>).

A site list should be visible that allows you to select the location where you would like to define the site.

List

The “List” property is the list that will contain the data retrieved and is a mandatory field. The List is automatically set to the list you are within at the moment (<Current List>).

Simply click on the yellow box and select the desired list of the site collection.

File Id

The “File Id” property contains the Item ID and is a mandatory field. This field is needed to make the search for the desired file.

Result

Allows a value (String) that contains the text file (text, xml, InfoPath).to be stored in a workflow variable.

2.3.3 XPath Query

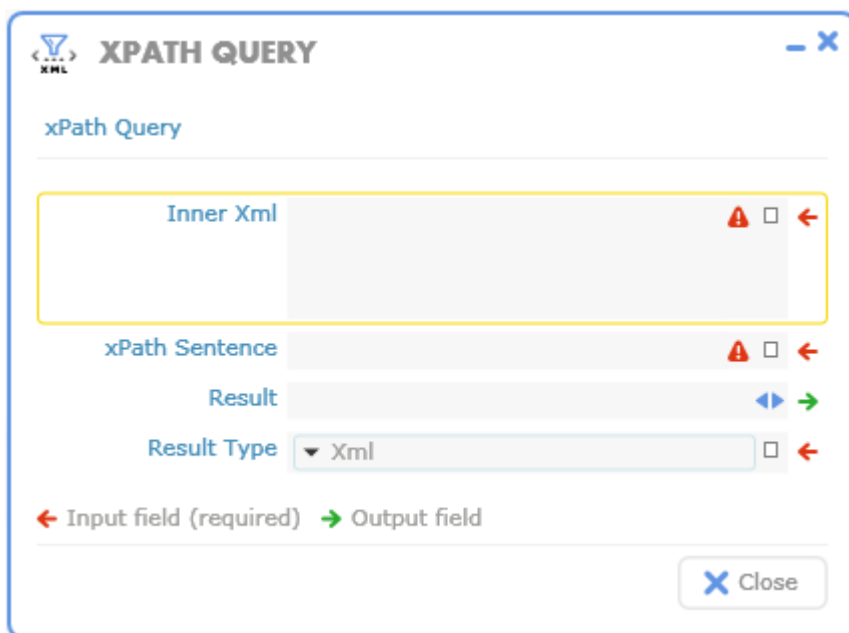
(* This topic applies to Enterprise Edition only)

The “XPath Query” action allows querying of XML to retrieve specific chunks of data and stores the results in a workflow variable.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the “Activity”

Options for this action



The screenshot shows the 'XPath Query' configuration dialog box. It has a title bar with an XML icon and the text 'XPath Query'. Below the title bar, there are four input fields: 'Inner Xml', 'XPath Sentence', 'Result', and 'Result Type'. Each field has a red warning icon, a square icon, and a red arrow icon. The 'Result' field has a blue double arrow icon and a green arrow icon. The 'Result Type' field is a dropdown menu with 'Xml' selected. At the bottom, there is a legend: a red arrow pointing left for 'Input field (required)' and a green arrow pointing right for 'Output field'. A 'Close' button is in the bottom right corner.

Inner Xml

The “Inner Xml” is the data that will contain the XML source and is a mandatory field.

XPath Sentence

The “XPath Sentence” allows querying of XML to retrieve specific chunks of data and is a mandatory field.

Result

The workflow variable to store the values selected from the query. It specifies where to store the resulting text.

Result Type

The result type depends on the XPath expression that you provide. You must select the according result type.

2.3.4 Xsl Transform

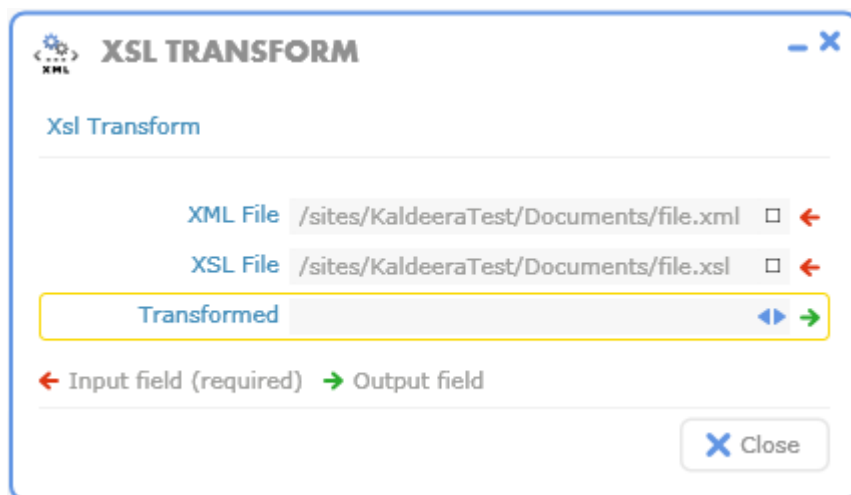
(* This topic applies to Enterprise Edition only)

The “xsl Transform” action allows the transformation of XML data and stores the results in a workflow variable.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the “Activity”

Options for this action



XML File

The XML File is the data that will contain the XML source and is a mandatory field.

XSL File

The XSL file to transform XML data and is a mandatory field.

Transformed

The workflow variable to store the values from the XSL transform.

2.3.5 Web Service Call

(* This topic applies to Enterprise Edition only)

The "Call web service" action is for advanced users and allows the workflow to make a call to a SOAP web service method.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity"

Options for this action

WEBSERVICE CALL

WebService call

WebService URL ⚠️ ◻️ ←

User name ◻️

Password ◻️

Domain ◻️

Soap Call ⚠️ ◻️ ←

Return value ↔️ →

Return type ⚠️ ◻️ ←

← Input field (required) → Output field

Close

Web service URL

A mandatory field that represents the full URL of the SOAP web service to call. Once a URL has been entered, the Refresh button can be pressed to define the available methods.

User name

The username to use when authenticating against the web service. This is an optional setting, however if left blank the web service must be open to anonymous access.

Password

An optional field that is the password used when authenticating against the web service. If left blank, the web service must be open to anonymous access.

Domain

The domain of the user to use when authenticating against the web service. This is an optional setting, however if left blank the web service must be open to anonymous access.

Soap Call

This defines the values to be sent to the web service. If the web service requires complex types as parameters, this field will require that the SOAP envelope is edited manually.

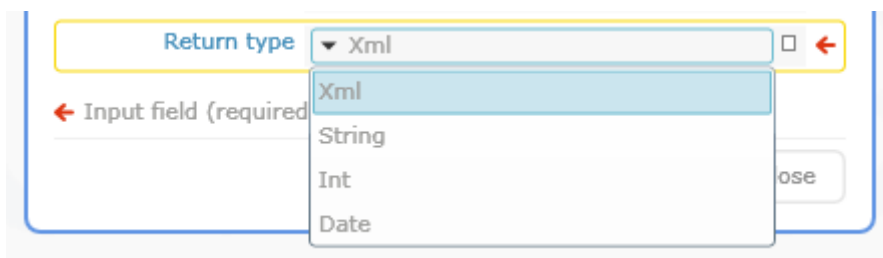
Editing the SOAP manually requires some advanced knowledge of web services or at the very least a well-documented web service that covers the request form in detail.

Return value

This field contains the workflow variable that is of text format and will be used to store the simple type result of the call.

Return type

The results will be embedded in a <xml> root element or other formats.



Example:

Soap Call

```
<GetList xmlns="http://schemas.microsoft.com/sharepoint/soap/">
  <listName>string</listName>
</GetList>
```

Return Type

```
<GetListResponse xmlns="http://schemas.microsoft.com/sharepoint/soap/">
  <GetListResult>
    <xsd:schema>schema</xsd:schema>xml</GetListResult>
</GetListResponse>
```

2.4 Item activities

2.4.1 Update current item

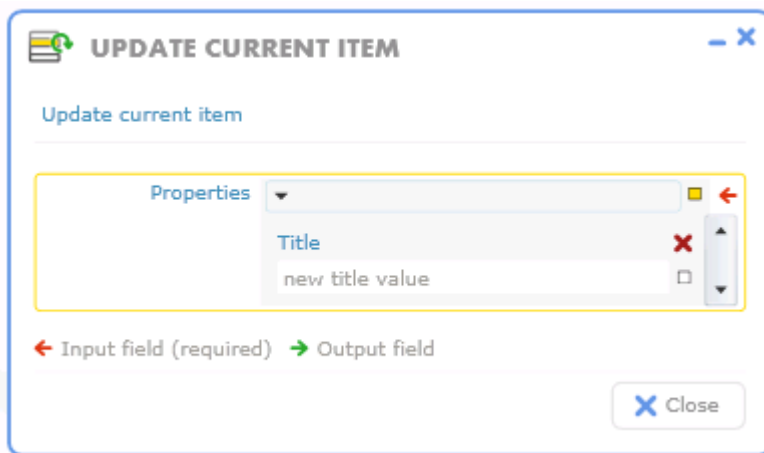
This workflow activity will allow you to change multiple fields in the list item, in one action. This activity updates the item data of any list of the site collection. This is a cross-site action.

Note: Only writable fields are allowed to modify its value.

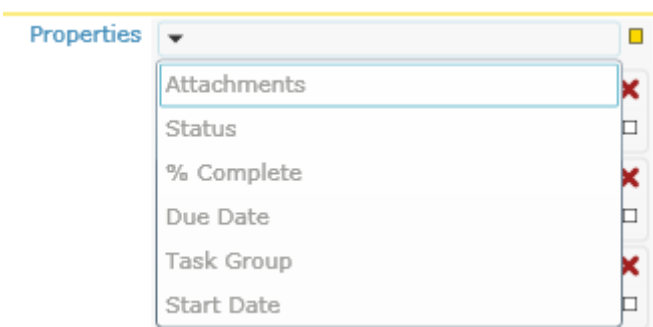
To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity"

Options for this action




You will need to select the fields in the current item to update as shown below



If a field is selected by mistake, simply click on "x" icon to delete the field.

Task Group	<input type="checkbox"/>
Projects	<input type="checkbox"/>
Description	<input type="checkbox"/>
new description value ...	<input type="checkbox"/>
Start Date	<input type="checkbox"/>
11/04/2007	<input type="checkbox"/>

Once all fields are selected, enter the updated data in each field or again, you could use the Lookups feature by clicking on 

UPDATE CURRENT ITEM

Update current item

Properties

Title	<input type="checkbox"/>
{variable: varTitle}	<input type="checkbox"/>

← Input field (required) → Output field

Close

Title

+ Add - Delete

Name	Type
Current web	String
Current list	String
Current item	List item id.
User who starts the workflow	String
User email who starts the workflow	String
varTitle	String

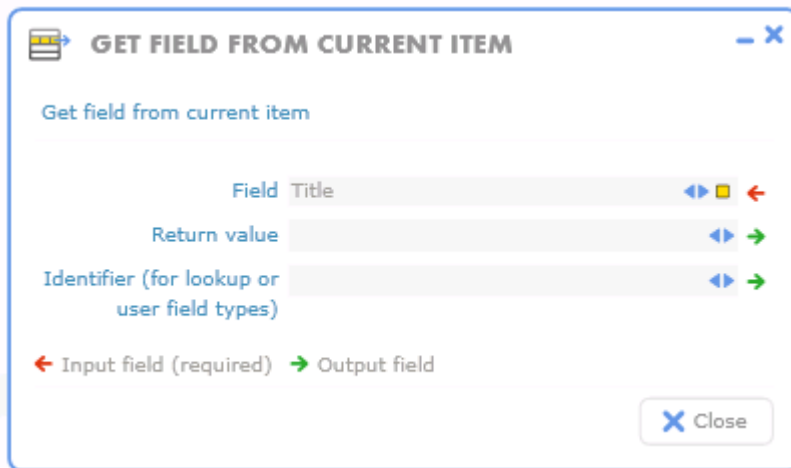
2.4.2 Get field from current item

The “Get list field” action gets the list item data and stores the results in a workflow variable. This action gets the item data of any list of the site collection. This is a cross-site action.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the “Activity”

Options for this action



Field

The field to search in the current list item. You have to select from the fields available in the drop-down control.

Return Value

Allows a value for the action to be stored in a workflow variable.

Identifier

Allows a value (ID) for lookup or user field types to be stored in a workflow variable.

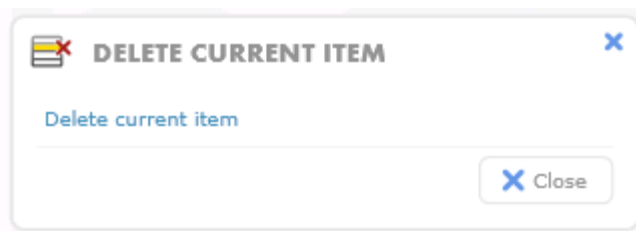
2.4.3 Delete current item

This workflow activity will allow you to delete the current list item.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity"

Options for this action



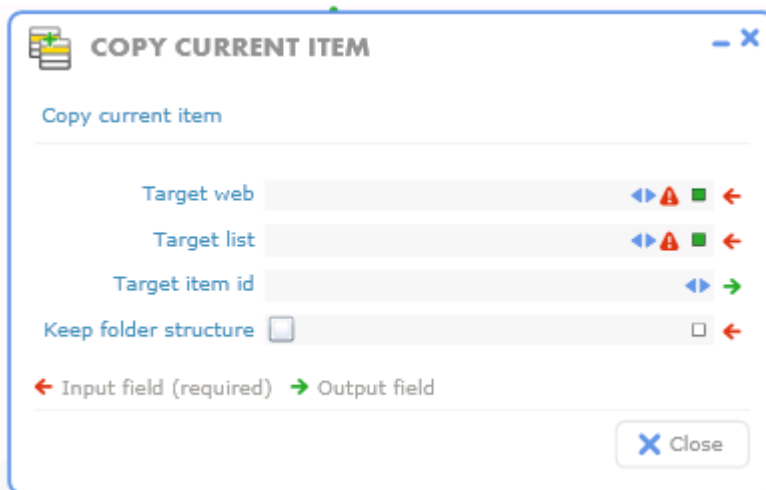
2.4.4 Copy current item

This workflow action copies the current item from the current list or library to another within the current site collection. It only allows copying locations in the same site collection. This is Windows Workflow Foundation behavior. The content type of the source must match the content type of the destination - the workflow will error if the source and destination are incompatible.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity"

Options for this action



Target Web

The Target Web is the site that will contain the target item data and is a mandatory field. The Target Web is automatically set to the site you are within at the moment (<Target Web>).

A site list should be visible that allows you to select the location where you would like to define the target site.

Target List

The Target List is the list that will contain the target item data and is a mandatory field. The Target List is automatically set to the site you are within at the moment (<Target List>).

A list should be visible that allows you to select the location where you would like to define the target list.

Target Item Id

The "Target Item Id" allows a value ID for the copied item to be stored in a workflow variable.

Keep folder structure

If this option is checked the item will be copied with the folders and subfolders that contain it. On the other side, if this option is unchecked (default value) the item will be copied to the target list root folder.

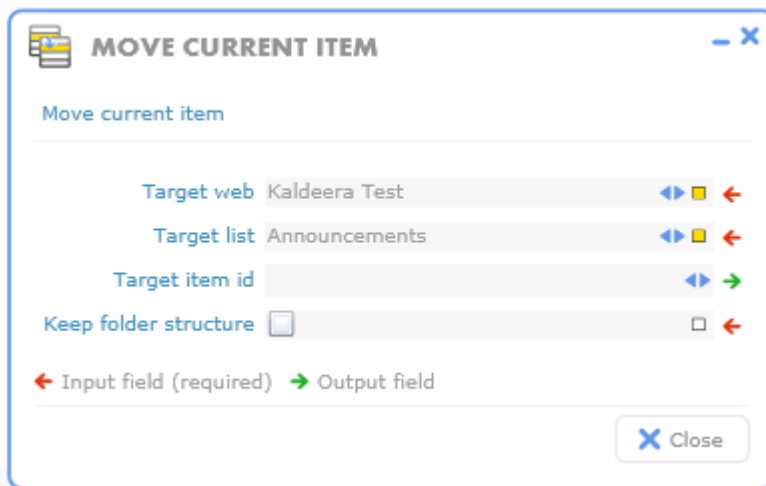
2.4.5 Move current item

This workflow action moves the current item from the current list or library to another within the current site collection. It only allows copying locations in the same site collection. This is Windows Workflow Foundation behavior. The content type of the source must match the content type of the destination - the workflow will error if the source and destination are incompatible.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the “Activity”

Options for this action



Target Web

The Target Web is the site that will contain the target item data and is a mandatory field. The Target Web is automatically set to the site you are within at the moment (<Target Web>).

A site list should be visible that allows you to select the location where you would like to define the target site.

Target List

The Target List is the list that will contain the target item data and is a mandatory field. The Target List is automatically set to the site you are within at the moment (<Target List>).

A list should be visible that allows you to select the location where you would like to define the target list.

Target Item Id

The “Target Item Id” allows a value ID for the moved item to be stored in a workflow variable.

Keep folder structure

If this option is checked the item will be moved with the folders and subfolders that contain it. On the other side, if this option is unchecked (default value) the item will be moved to the target list root folder.

2.5 List activities

2.5.1 Get list field

The “Get list field” action gets a list item data and stores the results in a workflow variable. This action gets the item data of any list of the site collection. This is a cross-site action.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the “Activity”

Options for this action

GET LIST FIELD

Get list field

Web {variable: Current web}

List {variable: Current list}

Item {variable: Current item}

Field ID

Return value

Identifier (for lookup or user field types)

← Input field (required) → Output field

Close

Web

The “Web” property is the site that will contain the data retrieved and is a mandatory field. The Source Web is automatically set to the site you are within at the moment (<Current Web>).

A site list should be visible that allows you to select the location where you would like to define the site.

List

The “List” property is the list that will contain the data retrieved and is a mandatory field. The List is automatically set to the list you are within at the moment (<Current List>).

Simply click on the yellow box and select the desired list of the site collection.

Item

The Item property contains the Item ID and is a mandatory field. This field is needed to make the search for the desired list item.

Field

The field to search in the selected list item. You have to select from the fields available in the drop-down control.

Return Value

Allows a value for the action to be stored in a workflow variable.

Identifier

Allows a value (ID) for lookup or user field types to be stored in a workflow variable.

2.5.2 Update list item

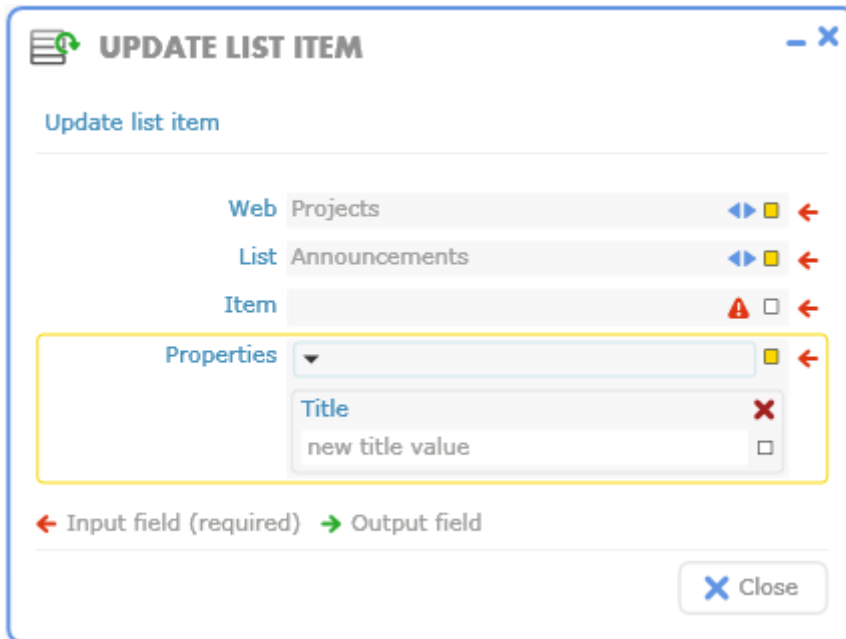
This workflow activity will allow you to change multiple fields in a list item, in one action. This activity updates the item data of any list of the site collection. This is a cross-site action.

Note: Only writable fields are allowed to modify its value.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity"

Options for this action



Web

The "Web" property is the site that will be updated and is a mandatory field. The Source Web is automatically set to the site you are within at the moment (<Current Web>). A site list should be visible that allows you to select the location where you would like to define the site.

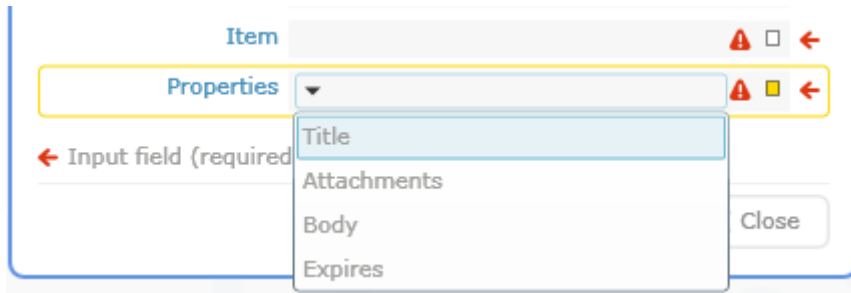
List

The "List" property is the list that will be updated and is a mandatory field. The List is automatically set to the list you are within at the moment (<Current List>). Simply click on the yellow box and select the desired list of the site collection.

Item


The Item property contains the list Item ID and is a mandatory field. This field is needed to make the search for the updated list item.

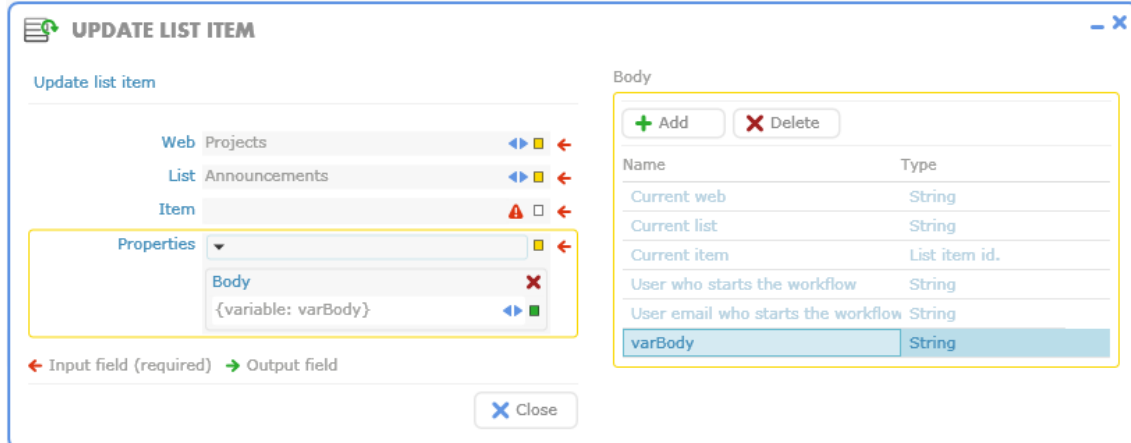
You will then need to select the fields in the current item to update as shown below



If a field is selected by mistake, simply click on “x” icon to delete the field.



Once all fields are selected, enter the updated data in each field or again, you could use the Lookups feature by clicking on 



2.5.3 Create list item

This workflow activity will allow you to create a new list item and update its fields, in one action.

This activity creates new item data of any list of the site collection. This is a cross-site action.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the “Activity”

Options for this action

CREATE LIST ITEM

Create list item

Web {variable: Current web}

List {variable: Current list}

Properties

Title
new title value ...

Item Id. {variable: var1}

← Input field (required) → Output field

Close

Web

The “Web” property is the site that will be updated with the new item and is a mandatory field. The Source Web is automatically set to the site you are within at the moment (<Current Web>). A site list should be visible that allows you to select the location where you would like to define the site.

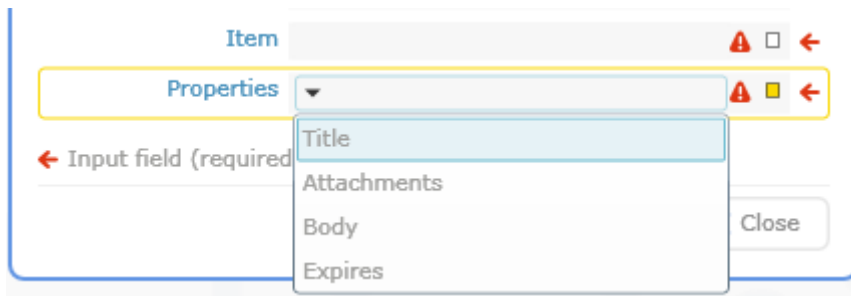
List

The “List” property is the list that will be updated with the new item and is a mandatory field. The List is automatically set to the list you are within at the moment (<Current List>). Simply click on the yellow box and select the desired list of the site collection.

Item ID


The “Item ID” allows a value ID for the action to be stored in a workflow variable.

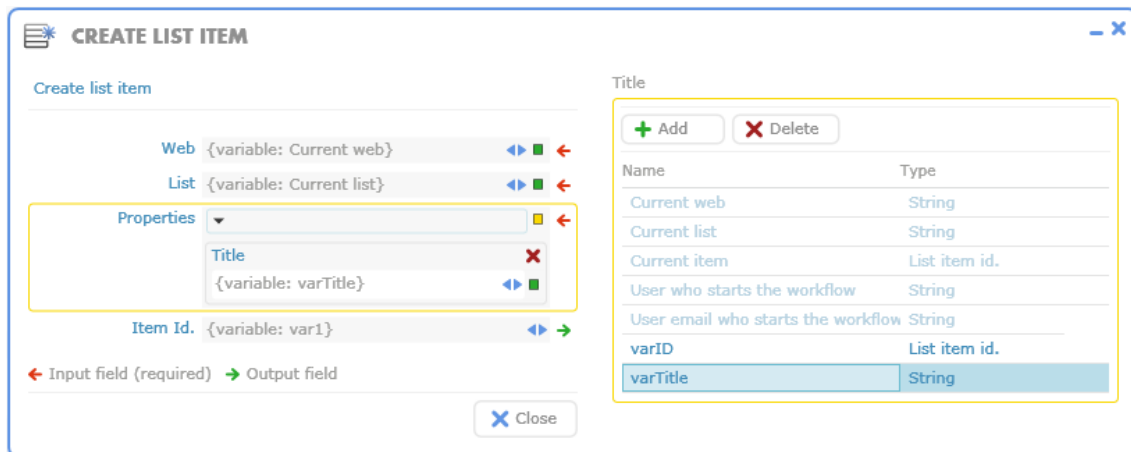
You will then need to select the fields in the current item to update as shown below



If a field is selected by mistake, simply click on "x" icon to delete the field.



Once all fields are selected, enter the updated data in each field or again, you could use the Lookups feature by clicking on 



2.5.4 Find list item

The “Find list item” activity is a powerful feature allowing you to make reference to any property of the current item or any item within a list in the current site.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the “Activity”

Options for this action

FIND LIST ITEM

Find list item

Web {variable: Current web}

List {variable: Current list}

Field Approval Status

Field value

Lookup fields type search

Impersonate search

Item identifier

← Input field (required) → Output field

Close

Web

The “Web” property is the site that will be found and is a mandatory field. The Source Web is automatically set to the site you are within at the moment (<Current Web>). A site list should be visible that allows you to select the location where you would like to define the site.


List

The “List” property is the list that will be found and is a mandatory field. The List is automatically set to the list you are within at the moment (<Current List>). Simply click on the yellow box and select the desired list of the site collection.

Field

The field in the list to search for. You have to select from the fields available in the drop-down control.

Field Value

The field value in the list to search for. You can enter information manually in the grey text box or you can use the lookup feature by clicking on 

Once all the options have been configured to your satisfaction, click the "Close" button at the bottom of the pop-up window.

Lookup fields type search

To make a search by a lookup field, you can provide the ID or the description for field value. If you provide the ID, you must check this parameter to ensure that search is performed correctly.

Impersonate search

This parameter allows search access to content that workflow users can't.

Item Identifier

The "Item Identifier" allows a value ID for the found item to be stored in a workflow variable.

2.5.5 Delete item

This workflow activity will allow you to delete a list item in a list within the current site collection. This is a cross-site action.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity"

Options for this action

DELETE ITEM

Delete item

Web {variable: Current web}

List {variable: Current list}

Item 23

← Input field (required) → Output field

Close

Web

The "Web" property is the site that will be updated and is a mandatory field. The Source Web is automatically set to the site you are within at the moment (<Current Web>). A site list should be visible that allows you to select the location where you would like to define the site.

List

The "List" property is the list that will be updated and is a mandatory field. The List is automatically set to the list you are within at the moment (<Current List>).

Simply click on the yellow box and select the desired list of the site collection.

Item

The Item property contains the list Item ID and is a mandatory field. This field is needed to make the search for the deleted list item.

2.5.6 Copy list item

This workflow action copies an item from one list or library to another within the current site collection. It only allows copying locations in the same site collection. This is Windows Workflow Foundation behavior. The content type of the source must match the content type of the destination - the workflow will error if the source and destination are incompatible.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity"

Options for this action

COPY LIST ITEM

Copy list item

Source web {variable: Current web}

Source list {variable: Current list}

Source item id

Target web Projects

Target list Issues

Target item id

Keep folder structure

← Input field (required) → Output field

Close

Source Web

The Source Web is the site that will contain the source item data and is a mandatory field. The Source Web is automatically set to the site you are within at the moment (<Current Web>).


A site list should be visible that allows you to select the location where you would like to define the source site.

Source List

The Source List is the list that will contain the source item data and is a mandatory field. The Source List is automatically set to the site you are within at the moment (<Current List>).

A list should be visible that allows you to select the location where you would like to define the source list.

Item

The item value in the list to copy from. You can enter information manually in the grey text box or you can use the lookup feature by clicking on it. 

This field is mandatory.

Target Web

The Target Web is the site that will contain the target item data and is a mandatory field. The Target Web is automatically set to the site you are within at the moment (<Target Web>).

A site list should be visible that allows you to select the location where you would like to define the target site.

Target List

The Target List is the list that will contain the target item data and is a mandatory field. The Target List is automatically set to the site you are within at the moment (<Target List>).

A list should be visible that allows you to select the location where you would like to define the target list.

Target Item Id

The "Target Item Id" allows a value ID for the copied item to be stored in a workflow variable.

Keep folder structure

If this option is checked the item will be copied with the folders and subfolders that contain it.

On the other side, if this option is unchecked (default value) the item will be copied to the target list root folder.

2.5.7 Move list item

This workflow action moves an item from one list or library to another within the current site collection. It only allows copying locations in the same site collection. This is Windows Workflow Foundation behavior. The content type of the source must match the content type of the destination - the workflow will error if the source and destination are incompatible.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity"

Options for this action

MOVE LIST ITEM

Move list item

Source item {variable: Current web}

Source list {variable: Current list}

Item

Target web Projects

Target list Issues

Target item id

Keep folder structure

← Input field (required) → Output field

Close

Source Web

The Source Web is the site that will contain the source item data and is a mandatory field. The Source Web is automatically set to the site you are within at the moment (<Current Web>).


A site list should be visible that allows you to select the location where you would like to define the source site.

Source List

The Source List is the list that will contain the source item data and is a mandatory field. The Source List is automatically set to the site you are within at the moment (<Current List>).

A list should be visible that allows you to select the location where you would like to define the source list.

Item

The item value in the list to move from. You can enter information manually in the grey text box or you can use the lookup feature by clicking on it. 

This field is mandatory.

Target Web

The Target Web is the site that will contain the target item data and is a mandatory field. The Target Web is automatically set to the site you are within at the moment (<Target Web>).

A site list should be visible that allows you to select the location where you would like to define the target site.

Target List

The Target List is the list that will contain the target item data and is a mandatory field. The Target List is automatically set to the site you are within at the moment (<Target List>).

A list should be visible that allows you to select the location where you would like to define the target list.

Target Item Id

The "Target Item Id" allows a value ID for the moved item to be stored in a workflow variable.

Keep folder structure

If this option is checked the item will be moved with the folders and subfolders that contain it.

On the other side, if this option is unchecked (default value) the item will be moved to the target list root folder.

2.6 Miscellaneous

2.6.1 PowerShell

(* This topic applies to Enterprise Edition only)

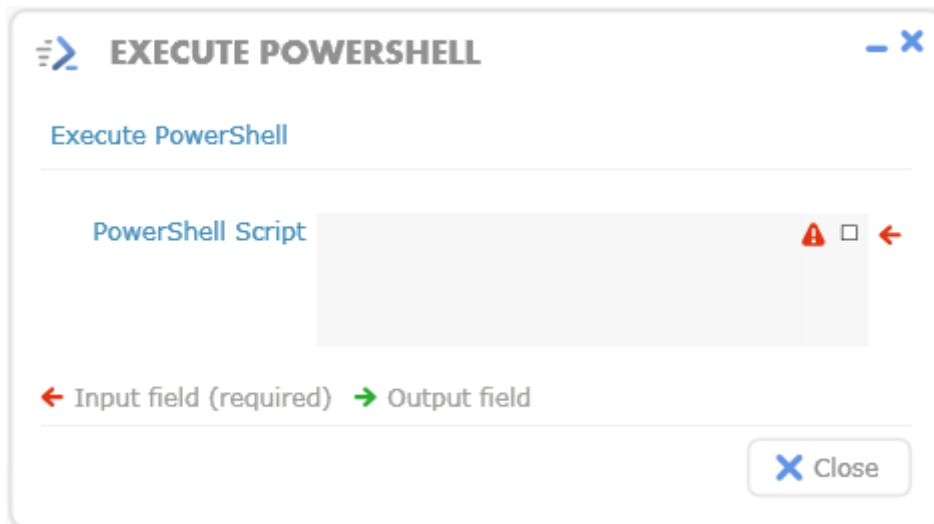
This feature allows you to execute PowerShell scripts anywhere within your SharePoint environment using the workflow.

Note: You will need to download and install PowerShell 1.0 on a machine where you installed SharePoint.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity"

Options for this action



PowerShell Script

It allows you to store the PowerShell script and is a mandatory field. The next example executes a CAML query:

```
$productlist = $web.Lists[$listguid]

$query = new-object Microsoft.SharePoint.SPQuery();

$query.Query = "<Where><BeginsWith><FieldRef Name='ProductModel' /><Value
Type='Text'>{variable: ProductFamily}</Value></BeginsWith></Where>
<OrderBy><FieldRef Name='ProductModel' /></OrderBy>"

$result = $productlist.GetItems($query)
```

In the PowerShell script you can use the following variables, for example:

- **\$site** = current SPSite
- **\$web** = current SPWeb
- **\$list** = the List of the Workflow SPList
- **\$item** = the SPListItem of the Workflow

2.6.2 Invoke Workflow

(* This topic applies to Enterprise Edition only)

This workflow action will initiate a different workflow in one library or list within the current site collection. From the text-box that is presented, enter the Workflow ID of a workflow to start.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity"

Options for this action

Web


The "Web" is the site that will contain the workflow to invoke and is a mandatory field. The Source Web is automatically set to the site you are within at the moment (<Current Web>). A site list should be visible that allows you to select the location where you would like to define the site.

List

The "List ID" is the list that will contain the workflow to invoke and is a mandatory field. The Source List is automatically set to the site you are within at the moment (<Current List>).


A list should be visible that allows you to select the location where you would like to define the list.

Workflow ID

The Workflow ID value in the list to invoke for. You can enter information manually in the grey text box or you can use the lookup feature by clicking on .

This field is mandatory.

Item

The item value in the list to invoke for. You can enter information manually in the grey text box or you can use the lookup feature by clicking on .

This field is mandatory.

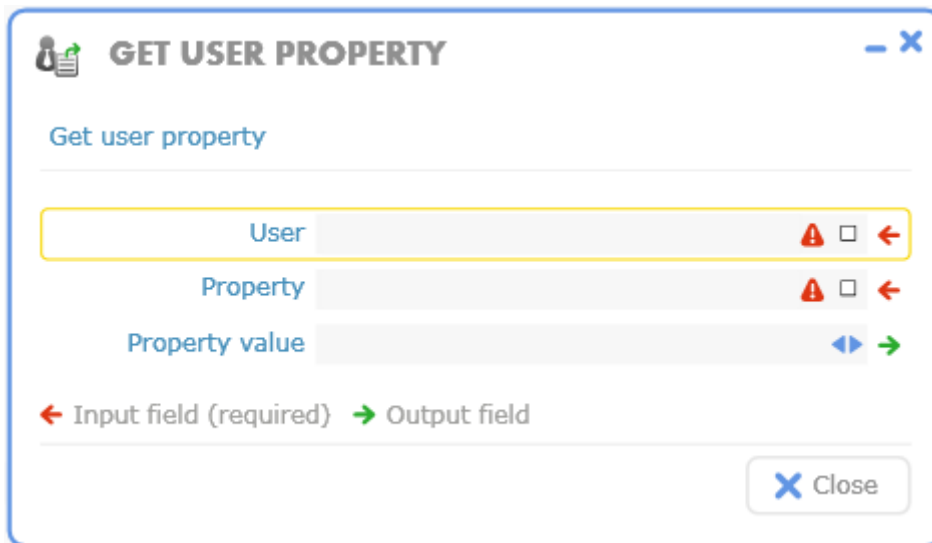
2.6.3 Get user property

This workflow action will get any user property and allows being stored in a String (Text) workflow variable. This variable can be used to other actions.


To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity".

Options for this action



User

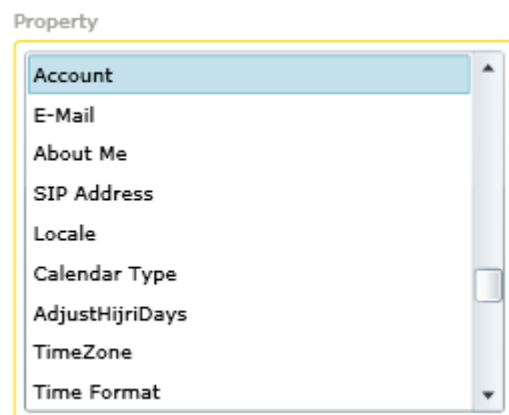
The "User" field sets the user to get the property value and is a mandatory field. You can add the user by clicking in the grey text box and typing the user account. You can also include references from the list the workflow is being used in by clicking on the button 

Property

The "Property" field allows selecting the property field of the user.

Property Value

Allow a value (user property) for the action being stored in a String (Text) workflow variable. This variable can be used to other actions.



2.7 Set web permissions

2.7.1 Set Web Permissions

(* This topic applies to Enterprise Edition only)

This "Set Web permissions" action allows the permissions to be changed for a Web on the site collection which the workflow is running.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity"

Options for this action

The screenshot shows the "SET WEB PERMISSIONS" configuration window. It includes the following elements:

- Web:** A text field with the value "{variable: Current web}" and navigation arrows.
- Users:** A text field with the value "PORTAL\administrator" and a search icon. A search results list on the right shows "administrator" and "PORTAL\administrator".
- Permission Levels:** A dropdown menu with a warning icon and navigation arrows.
- Legend:** A red arrow pointing left for "Input field (required)" and a green arrow pointing right for "Output field".
- Close:** A button with an "X" icon and the text "Close".

Web

The "Web" is the site that the permissions will be changed and is a mandatory field. The Source Web is automatically set to the site you are within at the moment (<Current Web>).

A drop-down should be visible that allows you to select the location where you would like to define the site.

Users

Allows you to select a user or group to whom you wish to assign access permissions for the web in the workflow. This is a mandatory field.

Permission Levels

The level of permissions you can select to assign to a user or group for the web in the workflow. The list of valid permission levels depends on the SharePoint site configuration.

Typically, the next values are defined by default:

- Full Control
- Contribute
- Design
- Read
- Limited Access

2.7.2 Set List Permissions

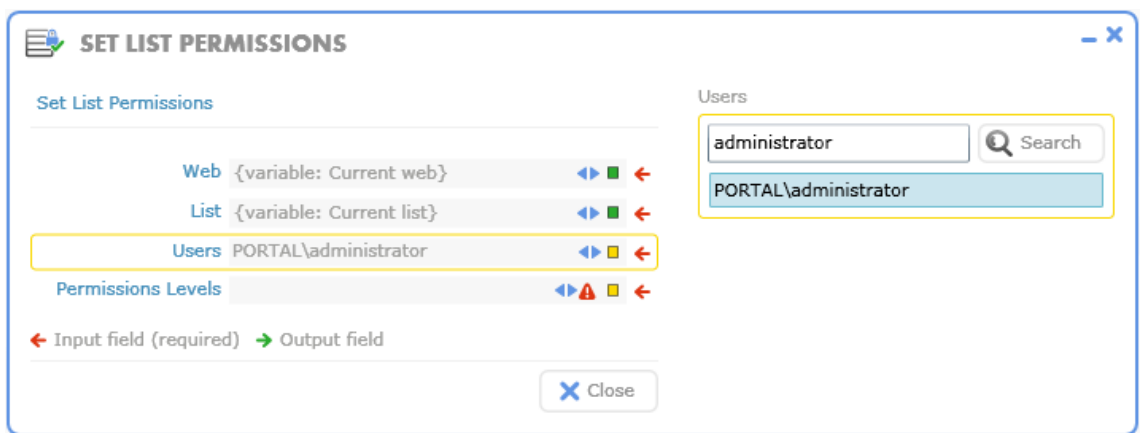
(* This topic applies to Enterprise Edition only)

This "Set List permissions" action allows the permissions to be changed for a list on the site collection which the workflow is running.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity"

Options for this action



Web

The "Web" is the site that the permissions will be changed and is a mandatory field. The Source Web is automatically set to the site you are within at the moment (<Current Web>).

A site list should be visible that allows you to select the location where you would like to define the site.

List

The "List" is the list that the permissions will be changed and is a mandatory field. The Source List is automatically set to the list you are within at the moment (<Current List>).

A list should be visible that allows you to select the location where you would like to define the list.

Users

Allows you to select a user or group to whom you wish to assign access permissions for the list in the workflow. This is a mandatory field.

Permission Levels

The level of permissions you can select to assign to a user or group for the list in the workflow. The list of valid permission levels depends on the SharePoint site configuration. Typically, the next values are defined by default:

- Full Control, Contribute, Design, Read, Limited Access

2.7.3 Set Item Permissions

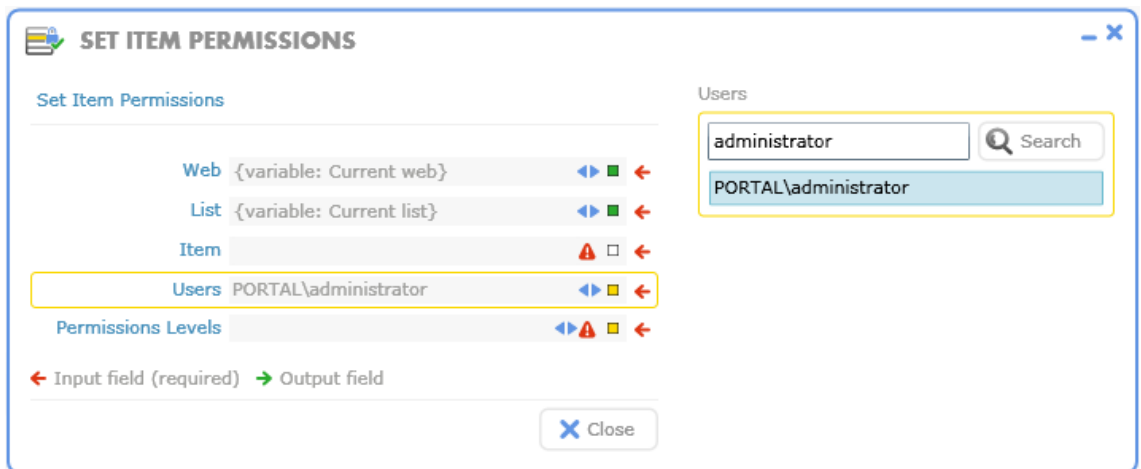
(* This topic applies to Enterprise Edition only)

This "Set Item permissions" action allows the permissions to be changed for an item on the list which the workflow is running.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the "Activity"

Options for this action



Web

The "Web" is the site that the permissions will be changed and is a mandatory field. The Source Web is automatically set to the site you are within at the moment (<Current Web>).

A site list should be visible that allows you to select the location where you would like to define the site.

List

The "List" is the list that the permissions will be changed and is a mandatory field. The Source List is automatically set to the list you are within at the moment (<Current List>). A list should be visible that allows you to select the location where you would like to define the list.

Item

The "Item" is the item that the permissions will be changed and is a mandatory field.

Users

Allows you to select a user or group to whom you wish to assign access permissions for the list in the workflow. This is a mandatory field.

Permission Levels

The level of permissions you can select to assign to a user or group for the item in the workflow. The list of valid permission levels depends on the SharePoint site configuration.

Typically, the next values are defined by default:

- Full Control
- Contribute
- Design
- Read
- Limited Access

2.7.4 Remove Web Permissions

(* This topic applies to Enterprise Edition only)

This option specifies to clear the permissions that are currently defined for a Web on the site collection which the workflow is running. You can choose:

- The 'All Permissions' option to remove all permissions from a user or group.
- The 'All Users' option to remove permissions from all users or groups.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the “Activity”

Options for this action

REMOVE WEB PERMISSIONS

Remove Web Permissions

Web {variable: Current web}

Users

All Users

Permission Levels

All Permissions

← Input field (required) → Output field

Close

Web

The “Web” is the site that the permissions will be removed and is a mandatory field. The Source Web is automatically set to the site you are within at the moment (<Current Web>).

A site list should be visible that allows you to select the location where you would like to define the site.

Users

Allows you to select a user or group to whom you wish to remove permissions for the web in the workflow. This is a mandatory field.

Permission Levels

The level of permissions you can select to remove to a user or group for the web in the workflow. The list of valid permission levels depends on the SharePoint site configuration. Typically, the next values are defined by default: Full Control, Contribute, Design, Read, Limited Access.

2.7.5 Remove List Permissions

(* This topic applies to Enterprise Edition only)

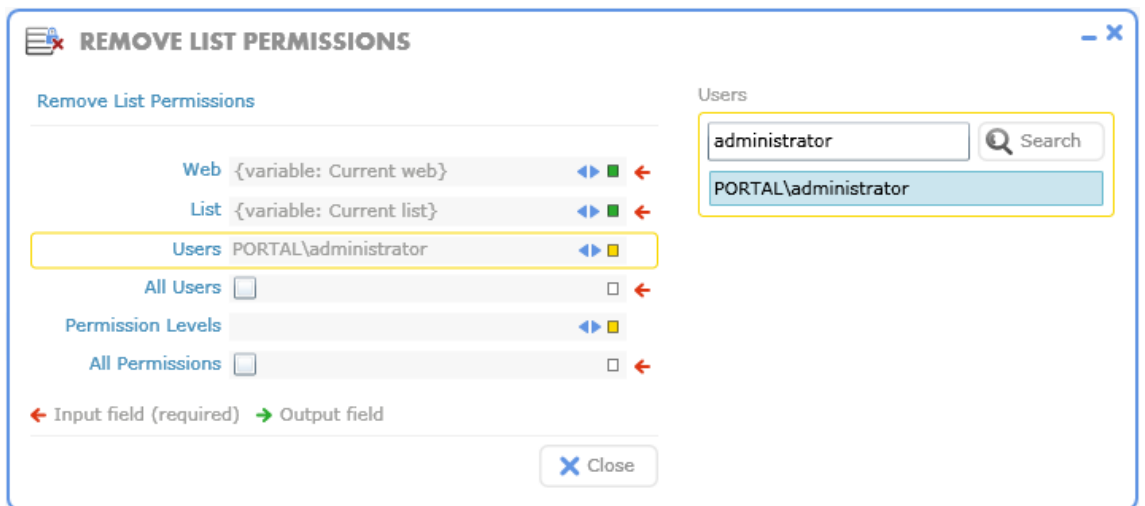
This option specifies to clear the permissions that are currently defined for a list on the site collection which the workflow is running. You can choose:

- The 'All Permissions' option to remove all permissions from a user or group.
- The 'All Users' option to remove permissions from all users or groups.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the “Activity”

Options for this action



Web

The “Web” is the site that the permissions will be removed and is a mandatory field. The Source Web is automatically set to the site you are within at the moment (<Current Web>).

A site list should be visible that allows you to select the location where you would like to define the site.

List

The “List” is the list that the permissions will be removed and is a mandatory field. The Source List is automatically set to the list you are within at the moment (<Current List>).

A list should be visible that allows you to select the location where you would like to define the list.

Users

Allows you to select a user or group to whom you wish to remove permissions for the list in the workflow. This is a mandatory field.

Permission Levels

The level of permissions you can select to remove to a user or group for the list in the workflow. The list of valid permission levels depends on the SharePoint site configuration.

Typically, the next values are defined by default:

- Full Control
- Contribute
- Design
- Read
- Limited Access

2.7.6 Remove Item Permissions

(* This topic applies to Enterprise Edition only)

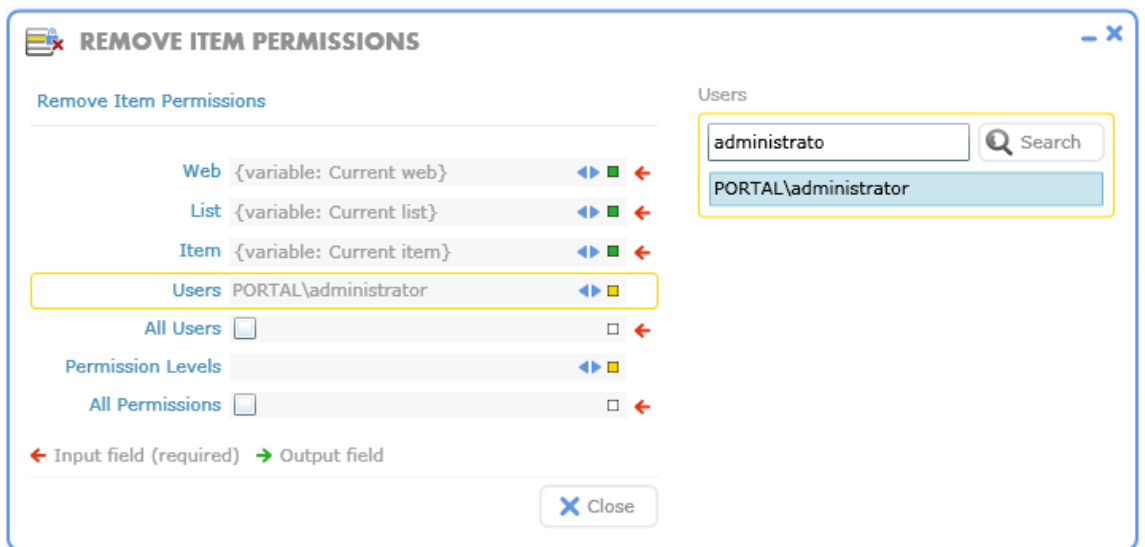
This option specifies to clear the permissions that are currently defined for an item on the list which the workflow is running. You can choose:

- The 'All Permissions' option to remove all permissions from a user or group.
- The 'All Users' option to remove permissions from all users or groups.

To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.

To change the settings used by the action, double-click in the “Activity”

Options for this action



Web

The “Web” is the site that the permissions will be removed and is a mandatory field. The Source Web is automatically set to the site you are within at the moment (<Current Web>).

A site list should be visible that allows you to select the location where you would like to define the site.

List

The “List” is the list that the permissions will be removed and is a mandatory field. The Source List is automatically set to the list you are within at the moment (<Current List>).

A list should be visible that allows you to select the location where you would like to define the list.

Item

The "Item" is the item that the permissions will be removed and is a mandatory field.

Users

Allows you to select a user or group to whom you wish to remove permissions for the list in the workflow. This is a mandatory field.

Permission Levels

The level of permissions you can select to remove to a user or group for the item in the workflow. The list of valid permission levels depends on the SharePoint site configuration. Typically, the next values are defined by default:

- Full Control
- Contribute
- Design
- Read
- Limited Access

2.8 Web activities

2.8.1 Create web from template

(* This topic applies to Enterprise Edition only)

This feature allows you to create a site anywhere within your SharePoint environment using the workflow.




To use the workflow action, drag it from the Actions palette at the bottom-left of the page and drop it onto a red rounded mark on the design canvas. Alternatively, you can select the action you require from the palette and left-click.




To change the settings used by the action, double-click in the "Activity"




Options for this action




CREATE WEB FROM TEMPLATE





Create web from template





Parent web {variable: Current web}   



Template   



New web name   


New web description   

Use unique permissions (break permissions inheritance)    


Convert web if exists (overwrite)    

New web identifier  


 Input field (required)  Output field



New web name

This is the name you wish to give the site and is a mandatory field. You can either type the name of the site manually or base it on a dynamic element provided by a lookup. To use the lookup feature, click on 

New web description

It is a brief statement about the site and is a mandatory field. You can either type the description of the site manually or base it on a dynamic element provided by a lookup. To use the lookup feature, click on 

Use unique permissions

Specifies whether or not to use the same permissions as the parent site.

If permissions are not inherited, a Site Owner must be specified. The Site Owner is the person who will manage the site that will be created. They will be given Administrator privileges for the created site.

Parent Web

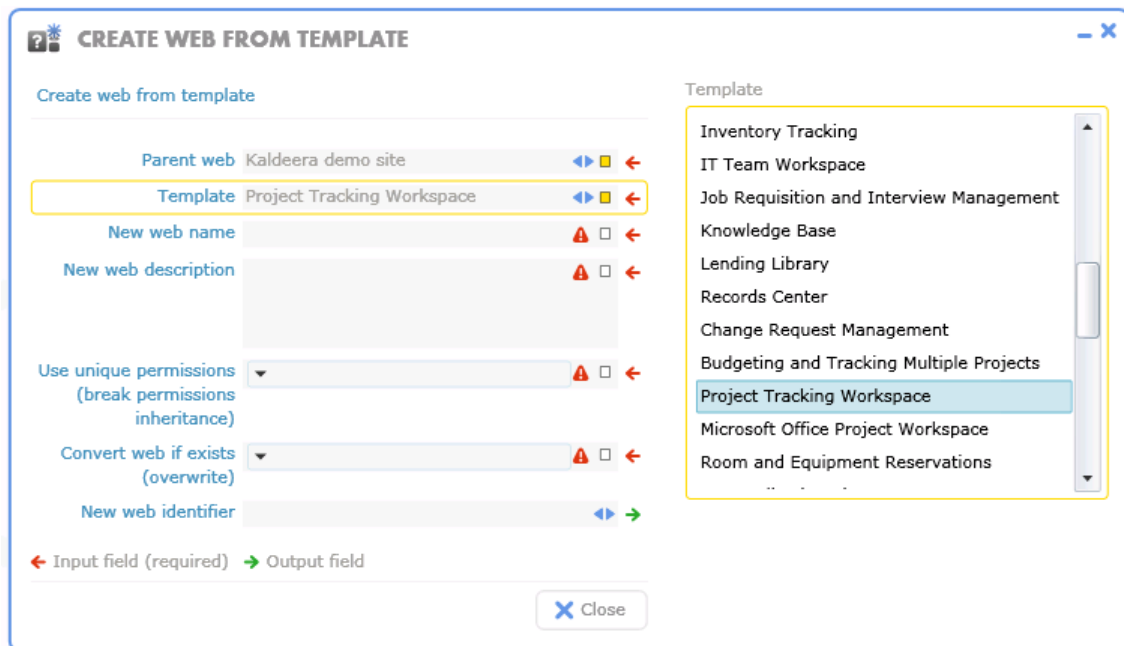
The Parent Web is the site that will contain the created site and is a mandatory field. The Parent Web is automatically set to the site you are within at the moment (<Current Web>).

A site list picker should be visible that allows you to select the location where you would like to create the new site. Click the site under which you want the new site to be created.

Template

The template is the SharePoint site template you wish to apply to the site that will be created. If multiple templates are installed in the environment, an option to view the different templates is available. It is an optional field.

Simply click on the right list box and select the desired template.



New web identifier

"New web identifier" allows you to store the URL for the created site in a text workflow variable and is an optional field. If there is no workflow variables created for the workflow, the list will be blank.

If the data is stored within a workflow variable it can be used at a later date to delete a site.

If the mandatory fields within the "Create web from template" workflow action are not set, a warning message will be shown on the design canvas. Until correctly set, the workflow cannot be published.