USER GUIDE

WORKFLOW
01/06/2021

1. INTRODUCTION

SharePoint workflows are pre-programmed mini-applications that streamline and automate a wide variety of business processes. Workflows can range from collecting feedback or approvals for a SharePoint page.
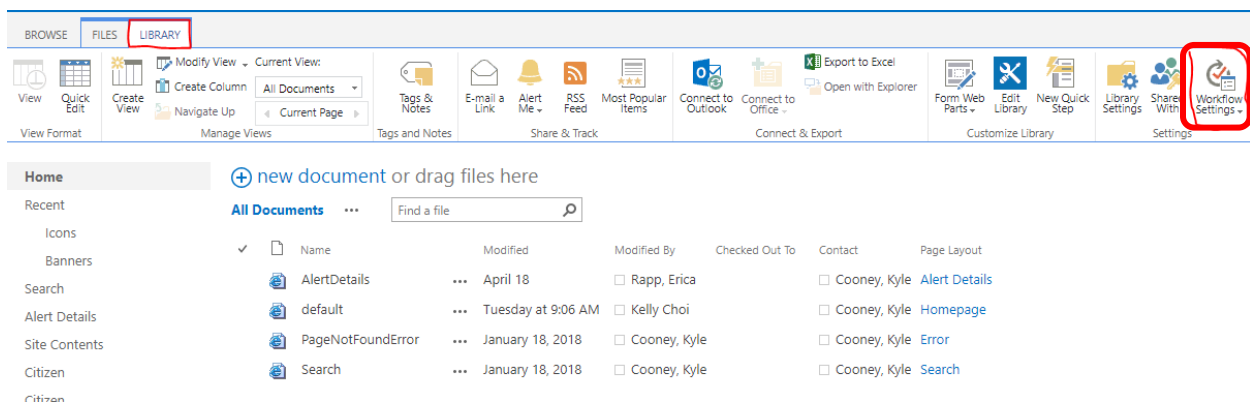
2. ADDING A WORKFLOW

2.1. Login to your respected AUTH website (e.g.: https://auth-agency.pa.egov.com/sites/HumanServices/Pages/default.aspx), go to the **subsite** you would like the workflow to be added to

2.1.1. Click ⚙

2.1.2. Click "Site Contents"

2.1.3. Find the Pages Library

2.1.3.1.   Select Library at the top then Workflow Settings

2.1.4. Click Add a workflow

2.1.5. Match all the information in the image below

Department of Human Services   Alert Details

Settings · Add a Workflow ⓘ

Content Type

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

Run on items of this type:

| This List ▼ |

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

Workflow

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

Select a workflow template:

Collect Signatures - SharePoint 2010	▲
Disposition Approval	
Publishing Approval	
Three-state	▼

Description:

Routes a page for approval. Approvers can approve or reject the page, reassign the approval task, or request changes to the page.

Name

Enter a name for this workflow. The name will be used to identify this workflow to users of this document library.

Enter a unique name for this workflow:

| DHS Workflow |

Feel free to name it what you would like

Task List

Select the name of the task list to use with this workflow, or create a new one.

Select a task list:

| Tasks (new) ▼ |

Description:

A new task list will be created for this workflow.

History List

Select the name of the history list to use with this workflow, or create a new one.

Select a history list:

| Workflow History ▼ |

Description:

History list for workflow.

Start Options

Specify how this workflow can be started.

☑ Allow this workflow to be manually started by an authenticated user with Edit Item permissions.
  ☐ Require Manage Lists Permissions to start the workflow.

☑ Start this workflow to approve publishing a major version of an item.

☐ Creating a new item will start this workflow.

☐ Changing an item will start this workflow.

2.1.5.1.   To select the approver group you would like, type in the name of the group then click the person with the check mark next to it (see image below)

2.1.5.2.   Always select "all at once (parallel)" as your Order

2.1.5.3.   To add another level of approvers, click "Add a new stage"

2.1.5.4.   Click Save

Approvers	**Assign To**				**Order**
	Approvers;				One at a time (serial) ▼
	☑ Add a new stage				
	Enter the names of the people to whom the workflow will assign tasks, and choose the order in which those tasks are assigned. Separate them with semicolons. You can also add stages to assign tasks to more people in different orders.				
Expand Groups	☐ For each group entered, assign a task to every individual member and to each group that it contains.				
Request					
	This message will be sent to the people assigned tasks.				
Due Date for All Tasks					
	The date by which all tasks are due.				
Duration Per Task					
	The amount of time until a task is due. Choose the units by using the Duration Units.				
Duration Units	Day(s) ▼				
	Define the units of time used by the Duration Per Task.				
CC					
	Notify these people when the workflow starts and ends without assigning tasks to them.				
End on First Rejection	☑ Automatically reject the document if it is rejected by any participant.				
End on Document Change	☑ Automatically reject the document if it is changed before the workflow is completed.				
Enable Content Approval	☑ Update the approval status after the workflow is completed (use this workflow to control content approval).				

Save	Cancel

2.2. Repeat for all subsites to have workflow

3. EDIT/ REMOVE A WORKFLOW

3.1. Follow steps in #2, but instead of adding a workflow,

3.2. To edit, click the workflow name

3.3. To remove/block, click Remove, Block, or Restore a Workflow

Settings › Remove Workflows ⓘ

SharePoint 2010 Workflows

Select the workflows to remove from this document library. Removing a workflow association cancels its running workflows. Select No New Instances to allow running workflows to complete.

Workflow	Instances	Allow	No New Instances	Remove
DHS Approval	0	◉	○	○

OK   Cancel

4. APPROVE/REJECT WORKFLOW MANUALLY

4.1. Login to your respected AUTH website (e.g.: https://auth-agency.pa.egov.com/sites/HumanServices/Pages/default.aspx), go to the **subsite** where the broken workflow exists.

4.1.1. Click ⚙ .

4.1.2. Select "Site Contents".

4.1.3. Find the Pages Library.

4.1.3.1. Looking at the 'Name' column, locate the page in the list.

4.1.3.2. Open the menu for the selected page by clicking the three ellipses dots to right of the page name.

4.1.3.3. Click the three ellipses dots in the menu to open the options menu.

4.1.3.4. Click 'Workflows'

4.1.3.5. Select 'Approve' or 'Reject'.

4.1.3.6. Click 'OK' to confirm.