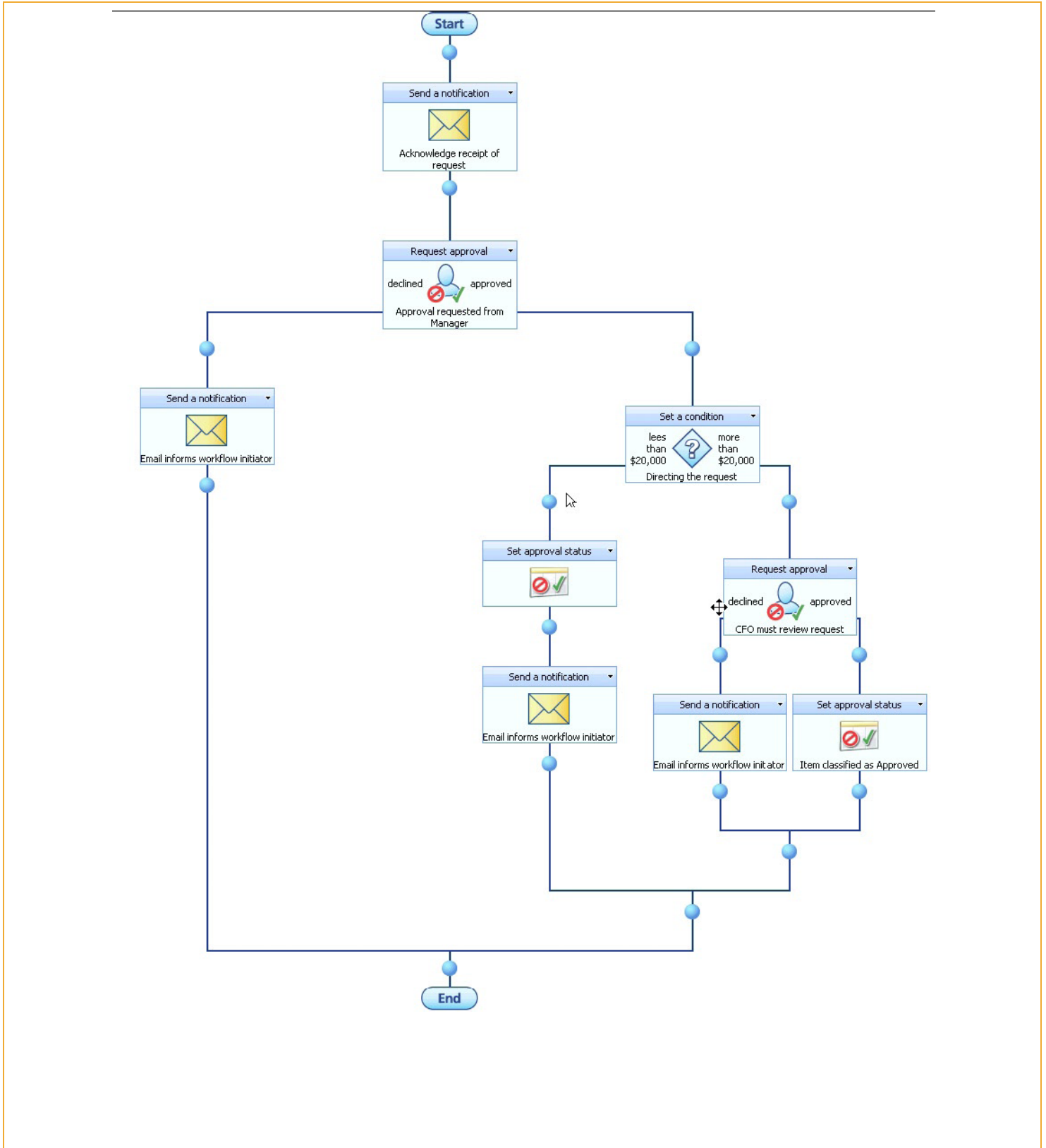


Tutorial 2:

Capital Expenditure Request Workflow creation



In this second tutorial, we are going to create the workflow shown above. It is a business process to automate a request for Capital Expenditure. The first part of the process is that the user's Manager reviews the request and approves or declines it. The workflow then determines if the CFO also needs to approve the request based on the amount being requested.

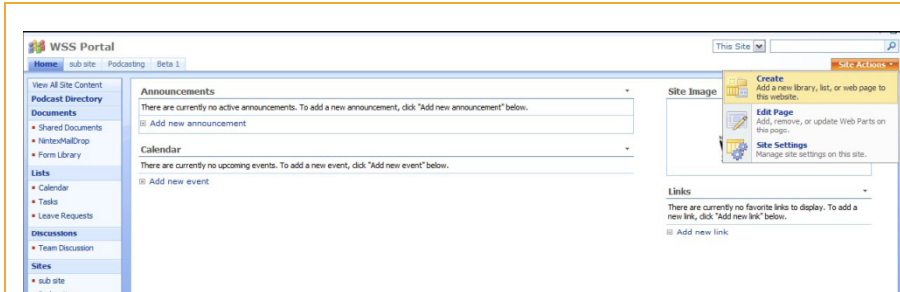
IMPORTANT NOTE: to enable the automatic choice of a user's manager, the information must be available in the user's Active Directory account. If you are using a site hosted by Nintex, the user's manager information will not be available. Please consult your System Administrator if you have any questions about Active Directory and how it is used in your organization.

Furthermore, this tutorial assumes that the SharePoint system you are accessing is fully and correctly configured.

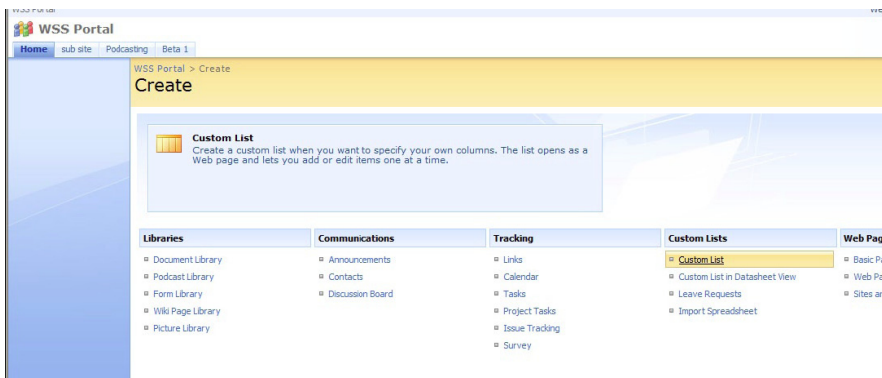
People undertaking the design of a workflow require "Design" permissions in SharePoint and "Allowed workflow designer" permissions, a Nintex option.

Tutorial 2 – Part 1:

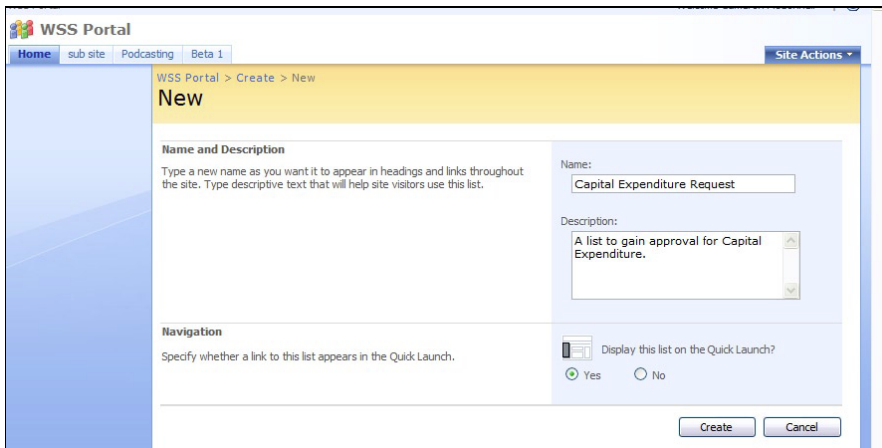
Creating the Capital Expenditure custom list in SharePoint 2007



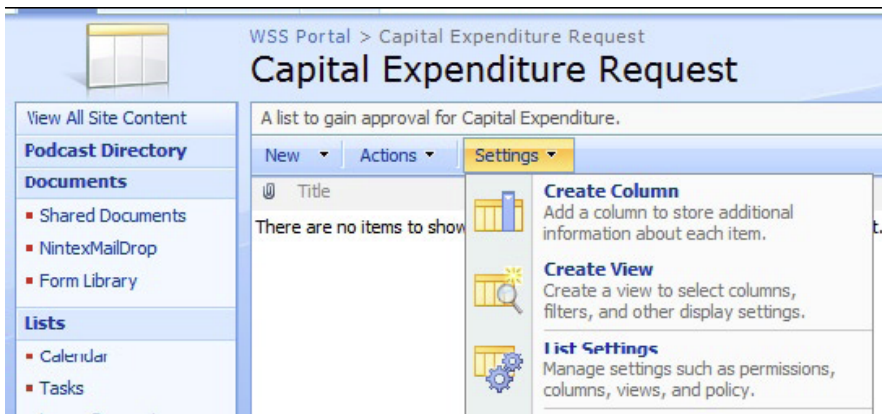
1. Navigate to your MOSS 2007 site, click in “Site Actions” and click on “Create”.



2. From the “Custom Lists” column, click the link “Custom List”.



3. Type a name and appropriate description for the list and click “Create”.



4. You will be located in the “Capital Expenditure Request” custom list. Now activate the settings dropdown and click on “List Settings”.

WSS Portal > Capital Expenditure Request > Settings

Customize Capital Expenditure Request

List Information

Name: Capital Expenditure Request
 Web Address: http://obs-steve:81/Lists/Capital Expenditure Request/AllItems.aspx
 Description: A list to gain approval for Capital Expenditure.

General Settings **Permissions and Management** **Communications**

- Title, description and navigation
- Versioning settings
- Advanced settings
- Delete this list
- Save list as template
- Permissions for this list
- Workflow settings
- RSS settings

Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Title	Single line of text	✓
Created By	Person or Group	
Modified By	Person or Group	

- Create column
- Add from existing site columns
- Column ordering
- Indexed columns

5. In the "Customize" page that loads, click on "Create Column".

WSS Portal > Capital Expenditure Request > Settings > Create Column

Create Column: Capital Expenditure Request

Use this page to add a column to this list.

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

Single line of text
 Multiple lines of text
 Choice (menu to choose from)
 Number (1, 1.0, 100)
 Currency (\$, ¥, €)

6. Set the name of the new column to "Amount" and the type to "Currency".

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
 Yes No

You can specify a minimum and maximum allowed value:
 Min: Max:

Number of decimal places:

Default value:
 Currency Calculated Value

Currency format:

7. Click the "Yes" radio button so that the column requires information and choose the currency appropriate for your environment.

Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Title	Single line of text	✓
Amount	Currency	✓
Created By	Person or Group	
Modified By	Person or Group	

- Create column
- Add from existing site columns
- Column ordering
- Indexed columns

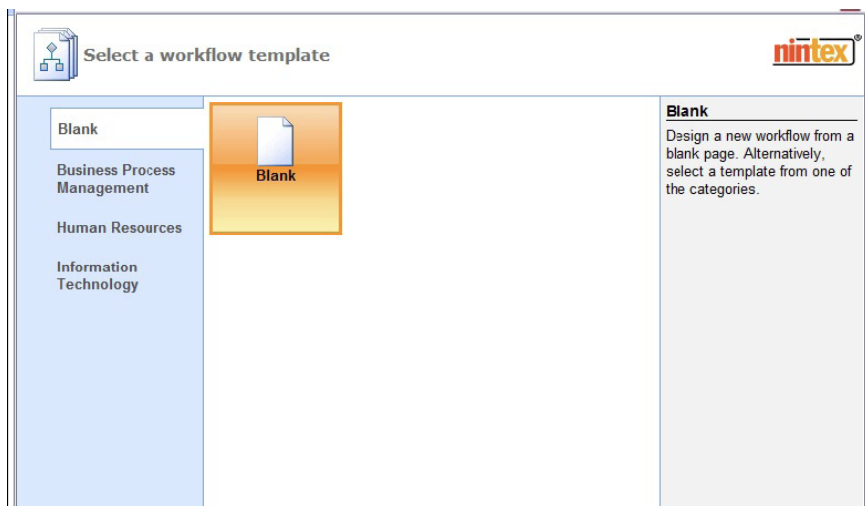
8. Now the list-item's title will be required and so will filling-in an amount. This is only a simple example of the information that could be required - a more realistic example would require descriptions and various other details. Now navigate back to the list using the breadcrumb trail above the page's title.

Tutorial 2 – Part 2:

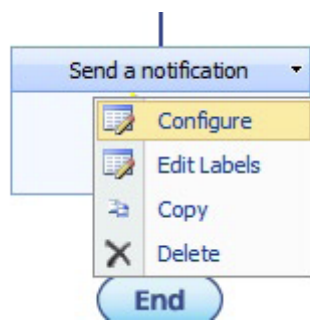
Creating the workflow – notification configuration



1. With our list configured, we can now create the workflow. Click the “Settings” button then the “Create Workflow” link.




2. From the Template Picker that pops up, double-click “Blank Workflow”.




3. Drag and drop a “Send a notification” action and click on the “Configure” link or double-click the action’s icon.

 Send a notification


To* 

CC

Subject* 

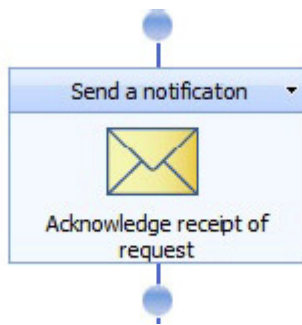
Attach file

Format

 Insert Reference

This notification indicates that your request for Capital Expenditure for the amount of Amount has been received and has entered the workflow.

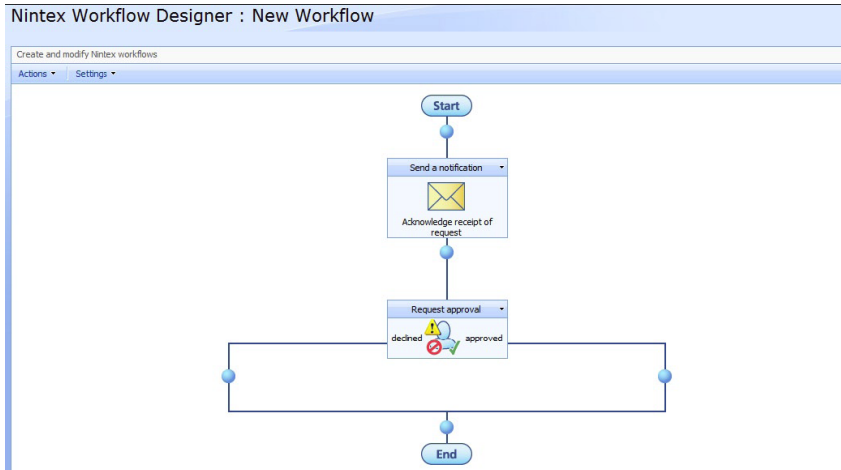
4. In the same way as Tutorial 1, make the initiator the "To:" recipient of the email and fill in an appropriate Subject line and email body. The Document Properties (in red) are added with the "Insert Reference" link (refer to Tutorial 1 or the product Help Files for more information). Click the "Save" button when finished.



5. You can now set an appropriate label for the action.

Tutorial 2 – Part 3:

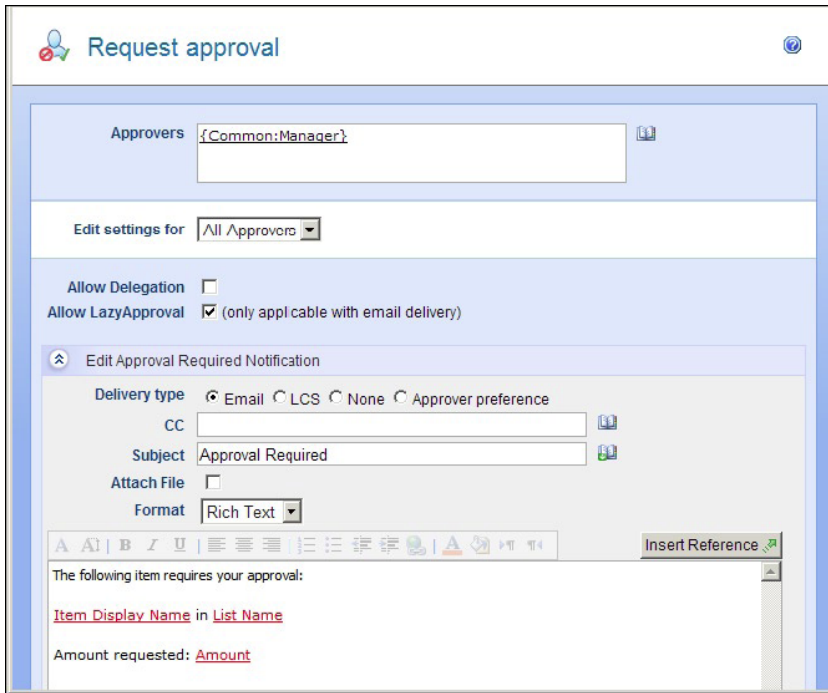
Creating the workflow – “Approver Request” configuration



1. Now Drag on a “Request Approval” action, click the “Configure” link.

2. For this tutorial, add an actual user that you can consider to be the Manager (if you know that Active Directory has not been set up with that information), otherwise use the Manager lookup so it will be automatically populated when the workflow runs.

Users are added in exactly the same way as for notifications. A notification will be sent to the selected user/approver. You can configure message detail using metadata from the document with a combination of your own text by using the “Insert Reference” link. The properties that can be added should be self-explanatory.

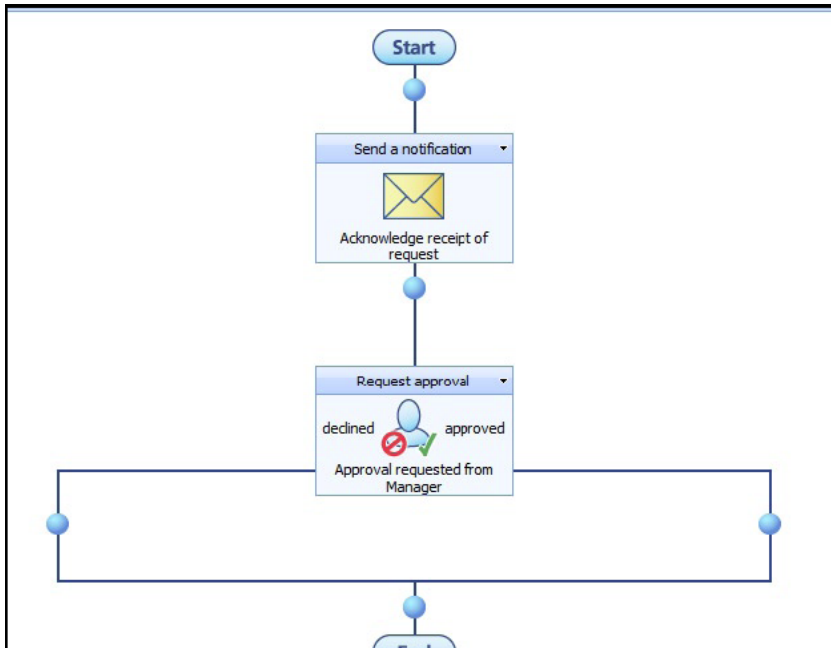


3. The finished notification message should look something like the screenshot to the left. For the sake of the tutorial, only a brief message has been added here.

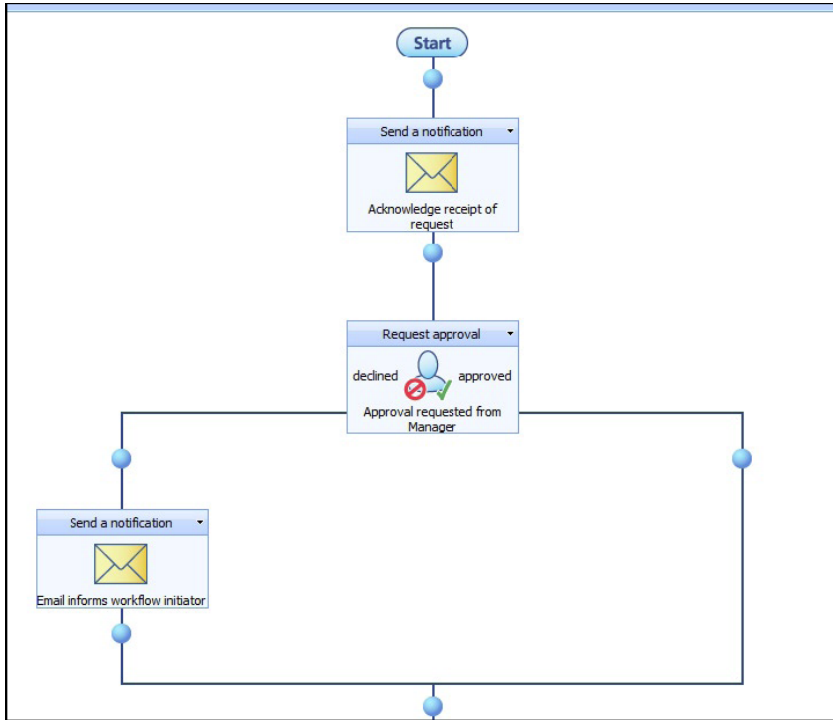
There is an option here called "Allow Delegation". It is not enabled to the left, but when the option is selected, the notification will conform to the user's settings regarding delegation. For more information, please refer to the product Help Files.

The "Approval Option" can either be "All Must Approve", "First response applies" or "Only one approval is required" because there is only one user.

Click "Save" to complete configuration of the "Request Approval" action.

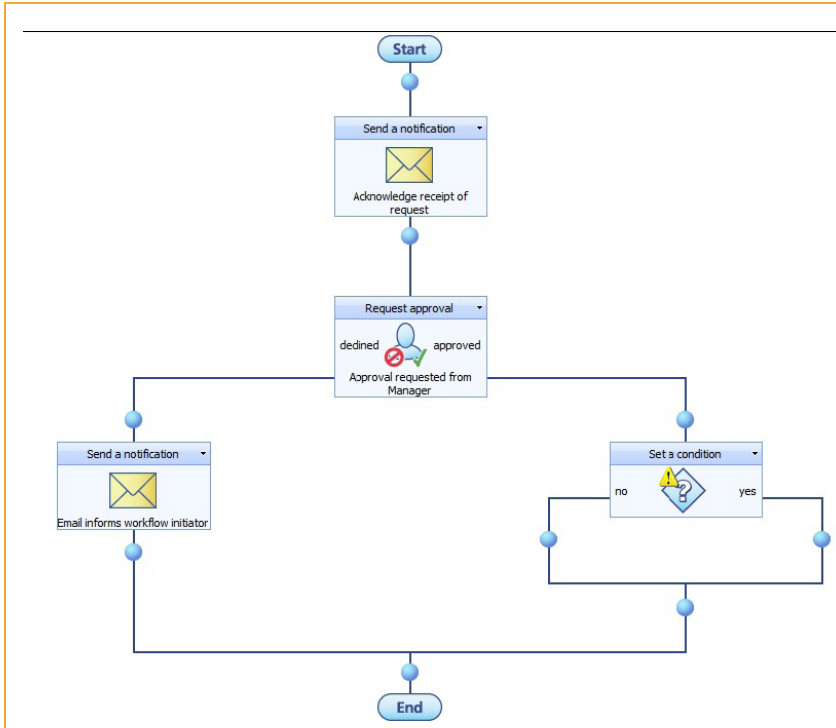


4. The Workflow should now look like this after the "Request approval" action is saved and any labelling completed.



5. Now drag, drop and configure a “Send a notification” action (and labels) that is sent to the initiator informing him/her when the decision is “Declined”. A good idea for that sort of notification is to include the Approver’s comments in the body.

Tutorial 2 – Part 4: Creating a condition



1. We are now going to create a decision point in the workflow which will determine whether the request is approved or needs to be approved by somebody else due to the amount requested.

Drag and drop a “Set a condition” action from the “Commonly used” or “Logic and flow” palettes onto the workflow, then click its “Configure” link.

Set a condition

Condition: Compare "Capital Expenditure Request" field

Where: Amount

- Amount
- Attachments
- Content Type
- Created
- Created By
- Edit
- ID
- Is Current Version
- Modified
- Modified By
- Name
- Title
- Type
- Version

Save Cancel

2. The first drop-down selects the source of information to make the basis of a comparison for the “decision”. In this case it is a field in the list we created, “Capital Expenditure Request”.

Based on the selection in the first dropdown, the second drop-down allows “Amount” to be chosen. Other options are clearly visible.

Set a condition

Condition: Compare "Capital Expenditure Request" field

Where: Amount

is greater than

Look-up button

Set Value -- Webpage Dialog

Source: Value

Amount: 20000

3. The next drop-down (the third) allows us to choose a condition type for our "Conditional Branch". In this case the appropriate condition type is "is greater than".

The fourth field is where (in this case) we set the amount. Firstly, click on the Look-up button.

Then select "Value" from the drop-down, set the amount to be 20000 and click "OK".

Set a condition

Condition: Compare "Capital Expenditure Request" field

Where: Amount

is greater than

20000

Save Cancel

4. The condition should now be able to be read in relatively plain language: "The amount is greater than 20,000". With the condition statement complete, click "Save".

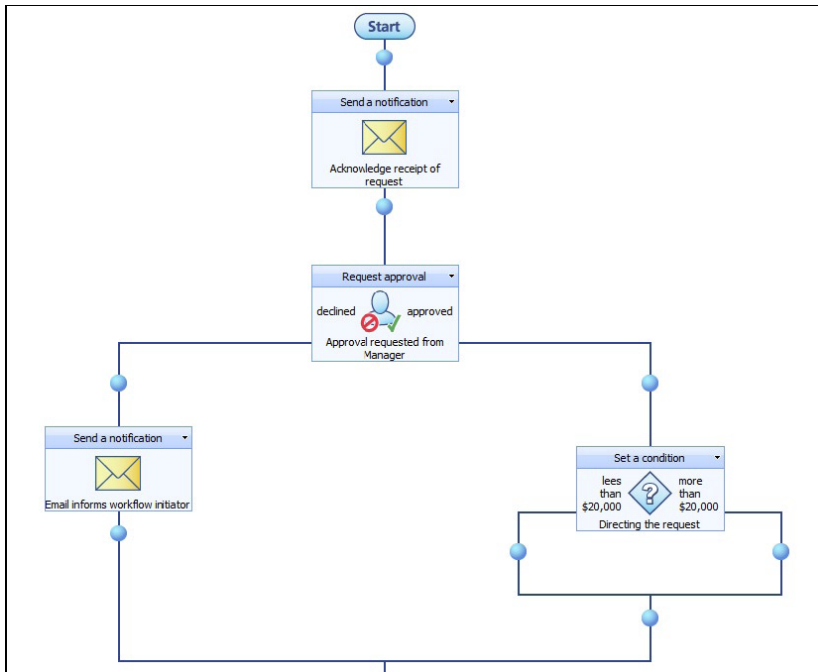
Action title: Conditional Branch

Left text: less than \$20,000

Right text: more than \$20,000

Bottom text: Directing the request

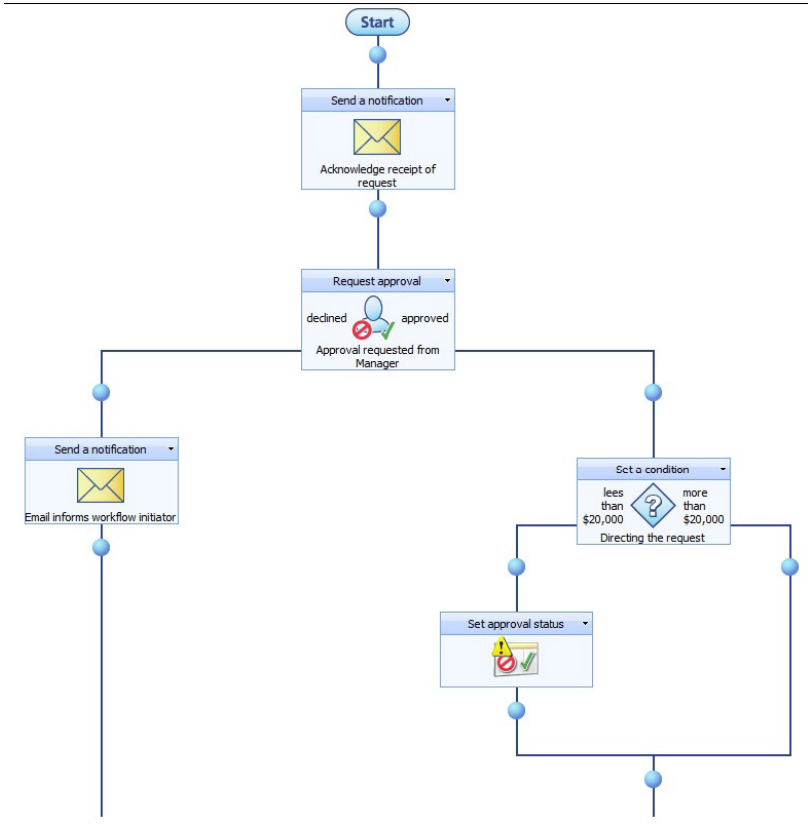
5. You can now set the action's labels to describe the condition.



6. With the “Conditional Branch” action complete, the workflow should appear as it does to the left.

Tutorial 2 – Part 5:


Setting the Content Approval status




```

graph TD
    Start([Start]) --> Send1[Send a notification  
Acknowledge receipt of request]
    Send1 --> Request[Request approval  
Approval requested from Manager]
    Request --> Send2[Send a notification  
Email informs workflow initiator]
    Request --> SetCond[Set a condition  
less than $20,000 / more than $20,000  
Directing the request]
    SetCond --> SetStatus[Set approval status]
    SetStatus --> End([End])
    
```

1. Drag and drop a “Set approval status” action. That action can set the state of the document to “Approved” or “Rejected”. It’s not a compulsory step so it has only been added once in this tutorial to demonstrate its functionality. Click the action’s “Configure” link.



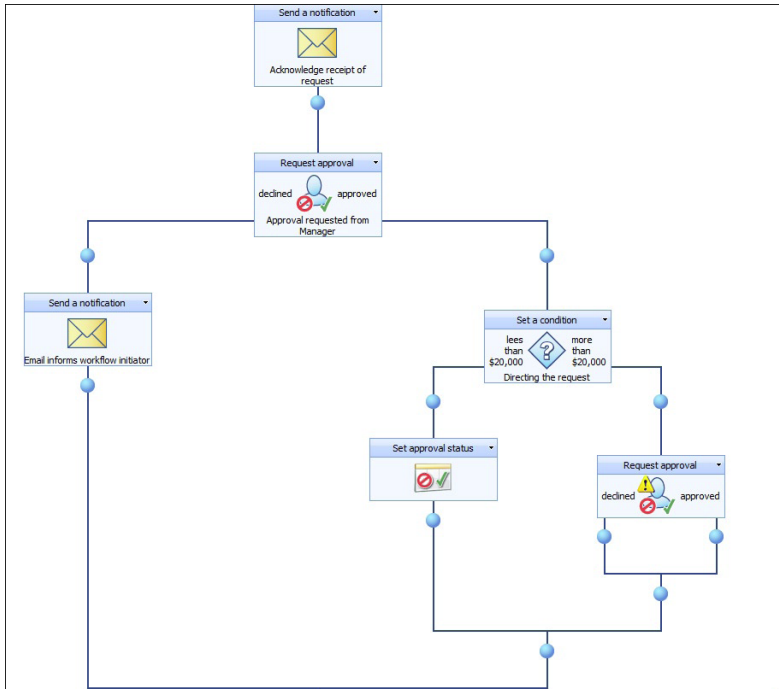
2. From the “Moderation Status” drop-down, select “Approved”, as in this case, if the first Manager approved the request and it was under \$20,000 then the request will have met the conditions necessary to proceed.



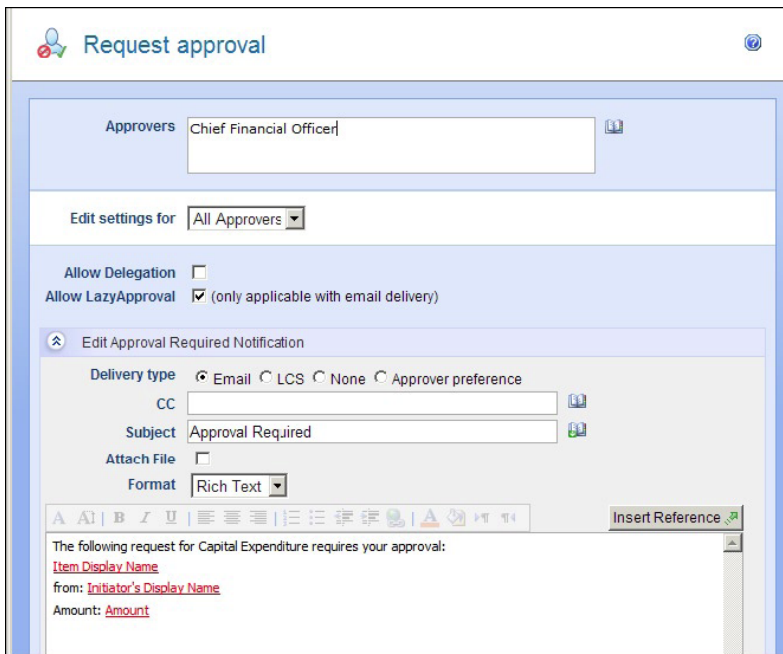
3. Comments can also be added if necessary. The comments can be accessed and displayed if Content Approval is switched on for a List or Library (SharePoint functionality). Click “save” to commit your changes.

Tutorial 2 – Part 6:

Setting the second approver



1. If the amount of the request is over \$20,000 the CFO needs to approve it. Drag on a “Request Approval” action and click its “Configure” link.



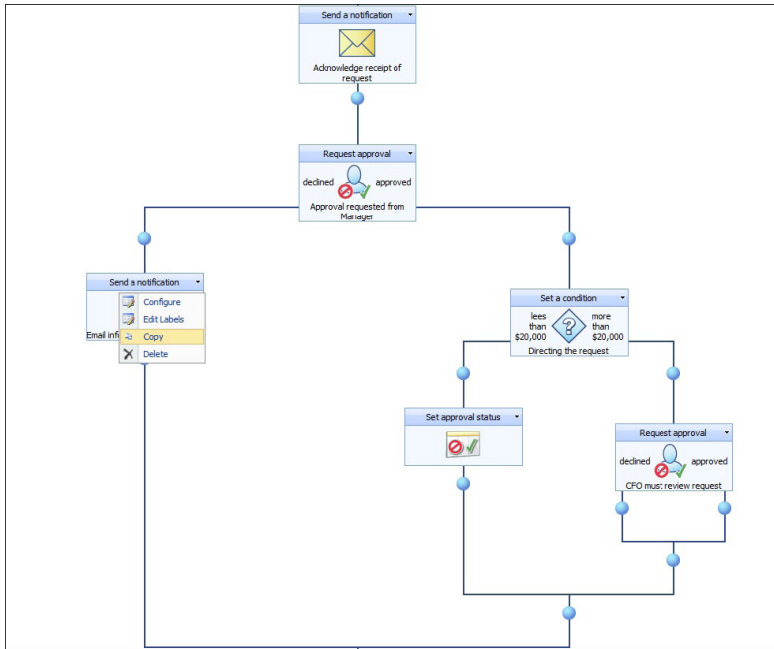
2. Select an appropriate user to be the CFO. PLEASE NOTE: in the screenshot to the left, the display name of the approver has been altered to read “Chief Financial Officer”. A user’s display name will be what is displayed. In a fully configured and integrated SharePoint 2007 environment, you could browse for an approver using the Global Address List (by clicking the Address Book icon located immediately to the right of the field) and be able to search by Job Title.

As usual, fill in the notification options to suit your requirements and click “Save”.

With only one user selected, any of the top 3 “Approval Options” will be valid. Click “Save” to commit your changes.

Tutorial 2 – Part 7:

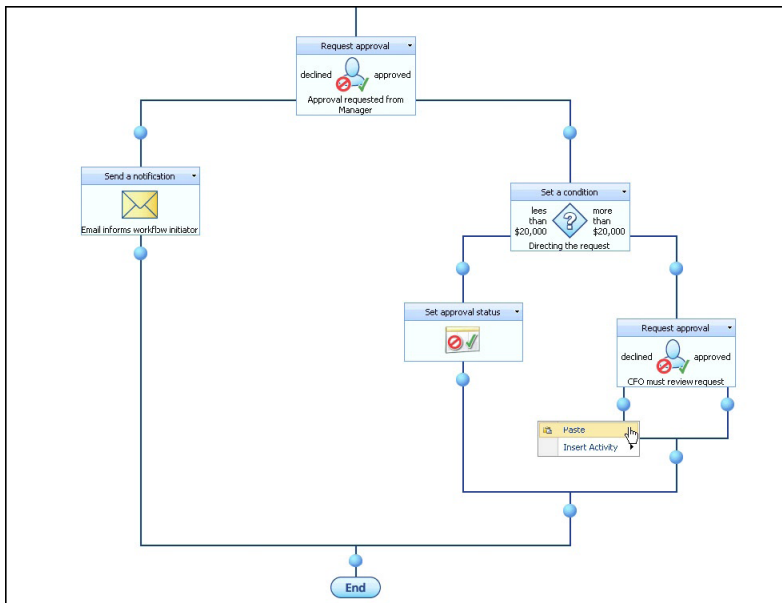
Configuring the remaining action – copying and pasting actions



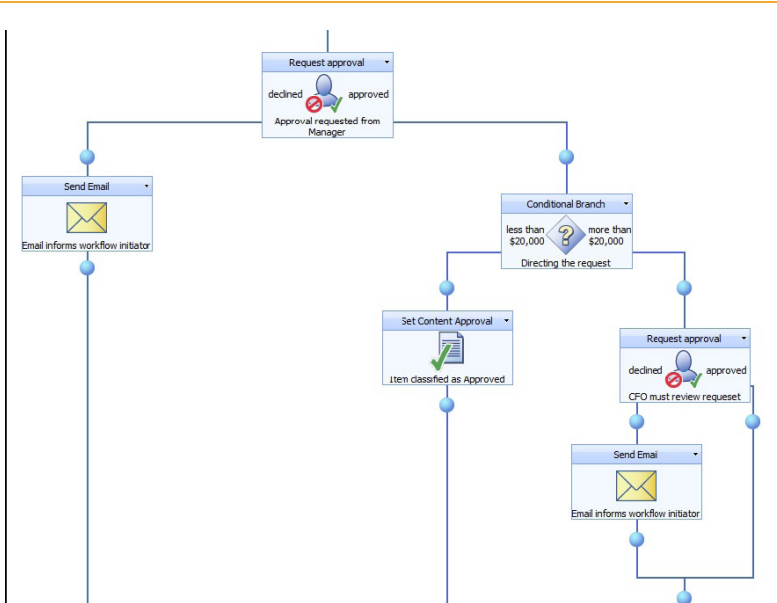
1. The workflow should now appear as it does in this screenshot.

Essentially, the rest of this workflow is about adding actions that are very similar to some that have already been created. So rather than configure them from scratch again we can copy and paste them then make the minor changes that may be necessary.

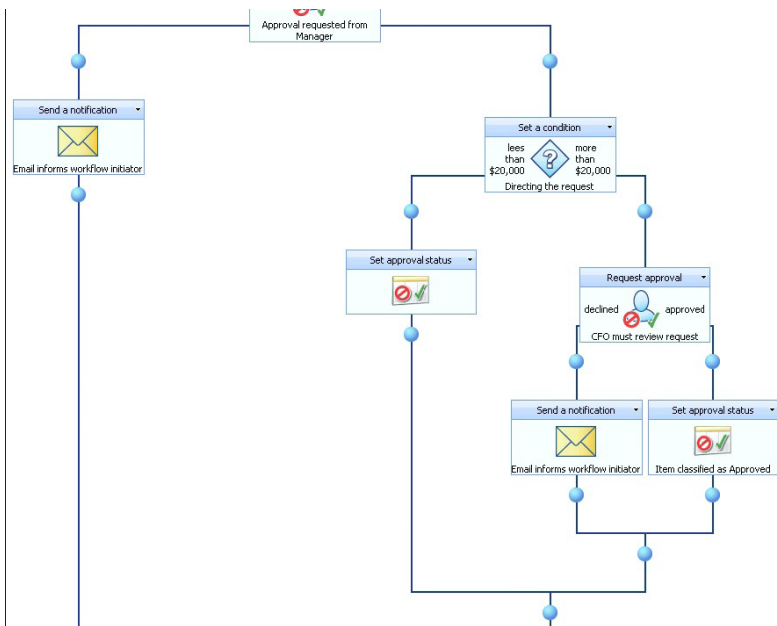
Activate the “Send Email” action’s dropdown and click “Copy”. It is the one we configured earlier for the case of a rejection.



2. Then right click on the pearl where you want the action copied to and click the “Paste” option.



3. The action is copied to your chosen location and can then be configured as desired.



4. The copy and paste process is repeated for the “Set approval status” action...

Set approval status

5. ...and can then be configured as desired.

Set the status to

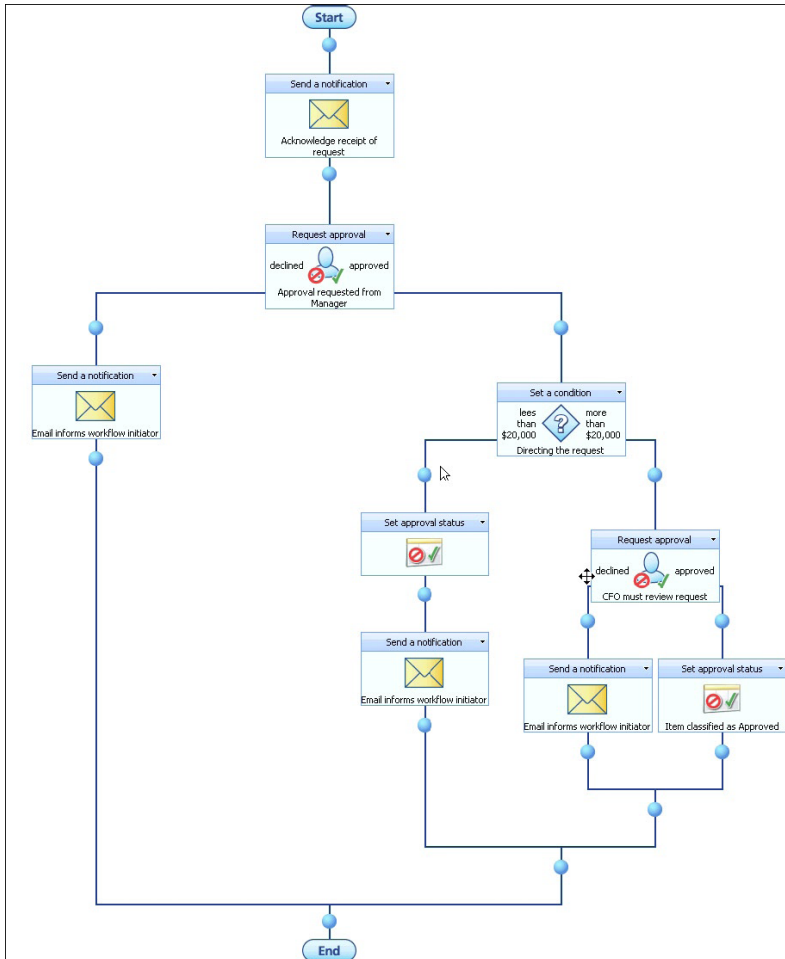
Comments Insert Reference

The request was approved by the CFO

Tutorial 2 – Part 8:

Completing the workflow

1. The almost complete workflow process should now appear like the screenshot to the left.



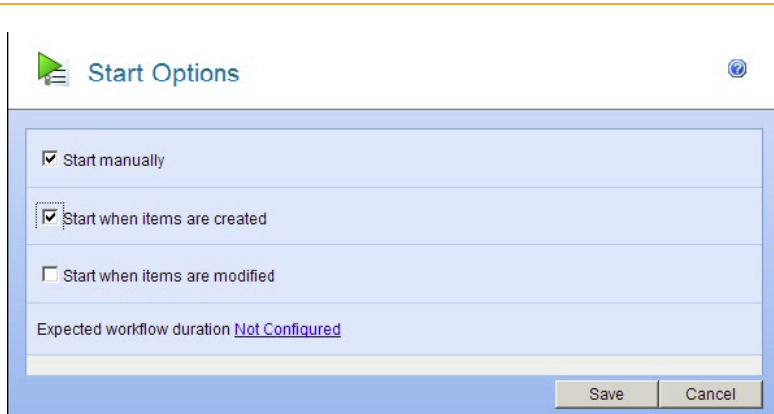
ABCID Title and Description

Title* Capital Expenditure

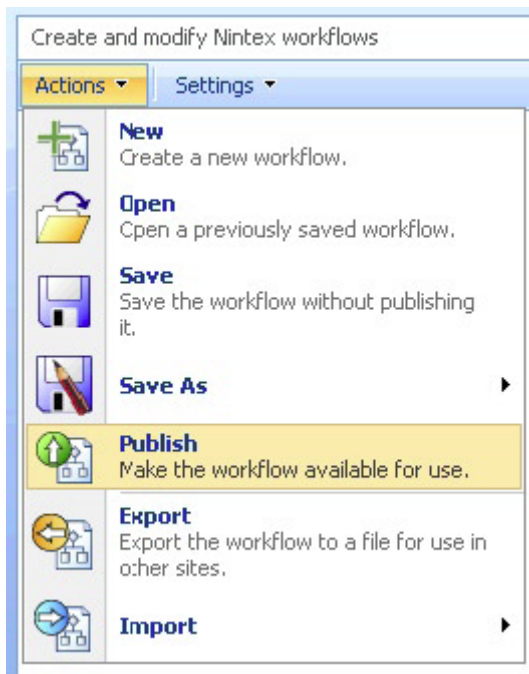
Description This workflow is used for Capital Expenditure requests. When the amount is under 20K, the manager can approve, otherwise the CFO must approve.

Save Cancel

2. To finish off the workflow, click the “Settings” button near the top of the page then “Title and Description” and enter the details as required. Then click the “Save” button.




3. Then click the “Settings” button again followed by “Start Options” and select your preferred options. Then click the “Save” button.



4. On the workflow designer page, click the “Actions” button.
In this case we assume the workflow is ready to be used by the company so we use the “Publish” option, which saves the workflow and associates it with the list, ready for use.

Tutorial 2 – Part 9: Using the workflow



WSS Portal > Capital Expenditure Request
Capital Expenditure Request

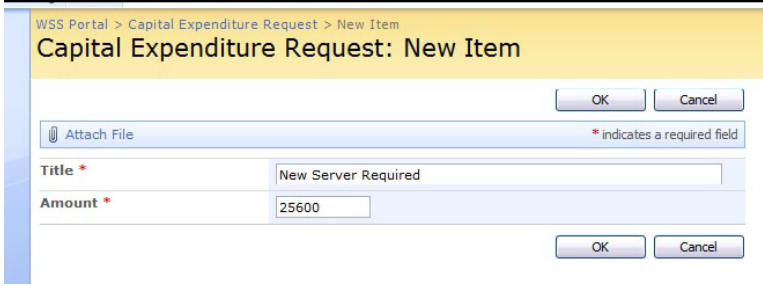
A list to gain approval for Capital Expenditure.

New Actions Settings

New Item
Add a new item to this list.

View All Site Content
Podcast Directory
Documents
Shared Documents
NintexMailDrop
Form Library
Lists
Calendar
Tasks

1. To use the workflow, we need to create a Capital Expenditure Request. Return to the custom list created earlier and click the new button and select “New Item”.



WSS Portal > Capital Expenditure Request > New Item
Capital Expenditure Request: New Item

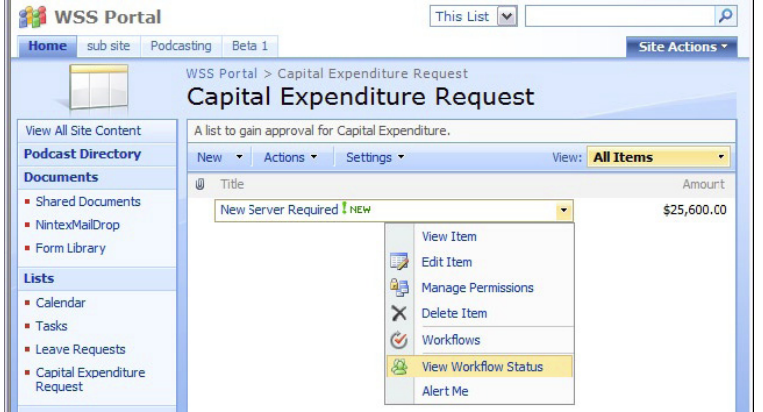
Attach File * indicates a required field

Title * New Server Required

Amount * 25600

OK Cancel

2. Fill in some details and an amount. If you want to test the whole workflow, enter an amount over \$20,000.



WSS Portal > Capital Expenditure Request
Capital Expenditure Request

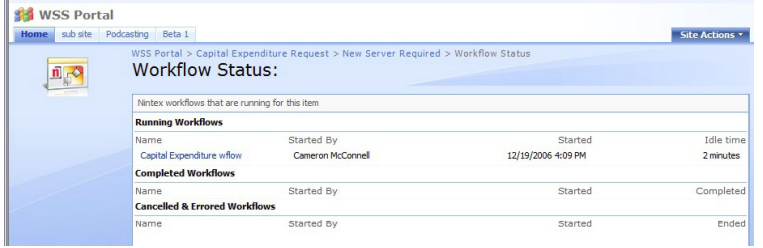
A list to gain approval for Capital Expenditure.

New Actions Settings View: All Items

Title	Amount
New Server Required NEW	\$25,600.00

View Item
Edit Item
Manage Permissions
Delete Item
Workflows
View Workflow Status
Alert Me

3. We set the workflow to begin when new items were added and to confirm that the workflow is in progress, activate the item drop-down and click the “View Workflow Status” link.



WSS Portal > Capital Expenditure Request > New Server Required > Workflow Status
Workflow Status:

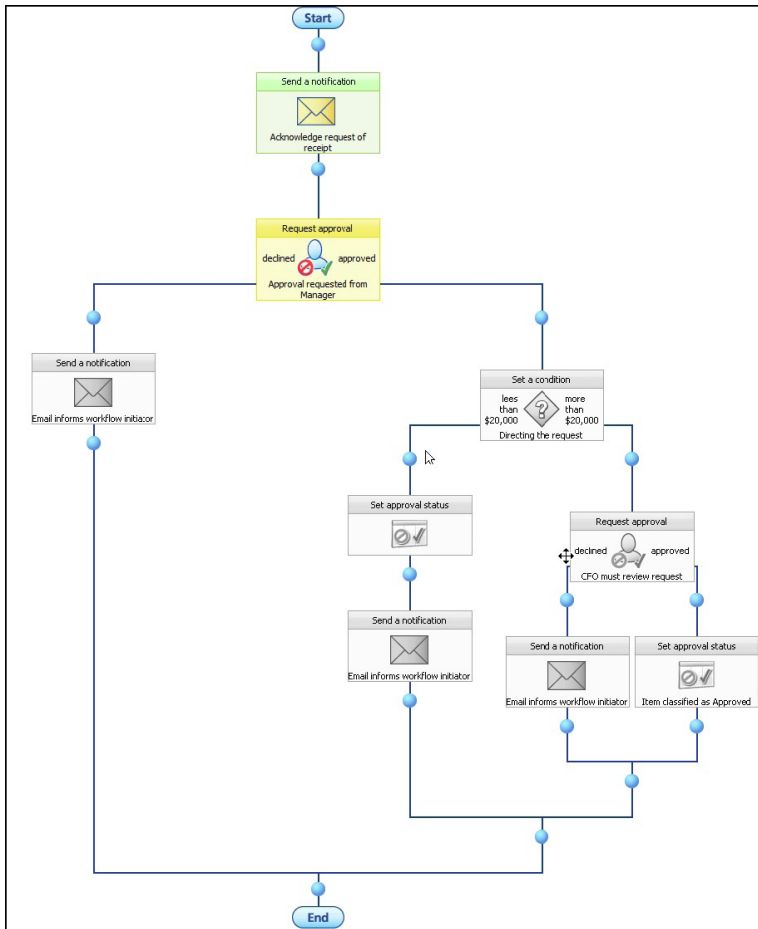
Nintex workflows that are running for this item

Running Workflows			
Name	Started By	Started	Idle time
Capital Expenditure wflow	Cameron McConnell	12/19/2006 4:09 PM	2 minutes

Completed Workflows			
Name	Started By	Started	Completed

Cancelled & Errored Workflows			
Name	Started By	Started	Ended

4. A list or library can have any number of workflows running. In this case there is only one, so click on the workflow name to view the status.



5. The workflow should be displayed with the “Send email” action complete (green) and “Request Approval” action current.