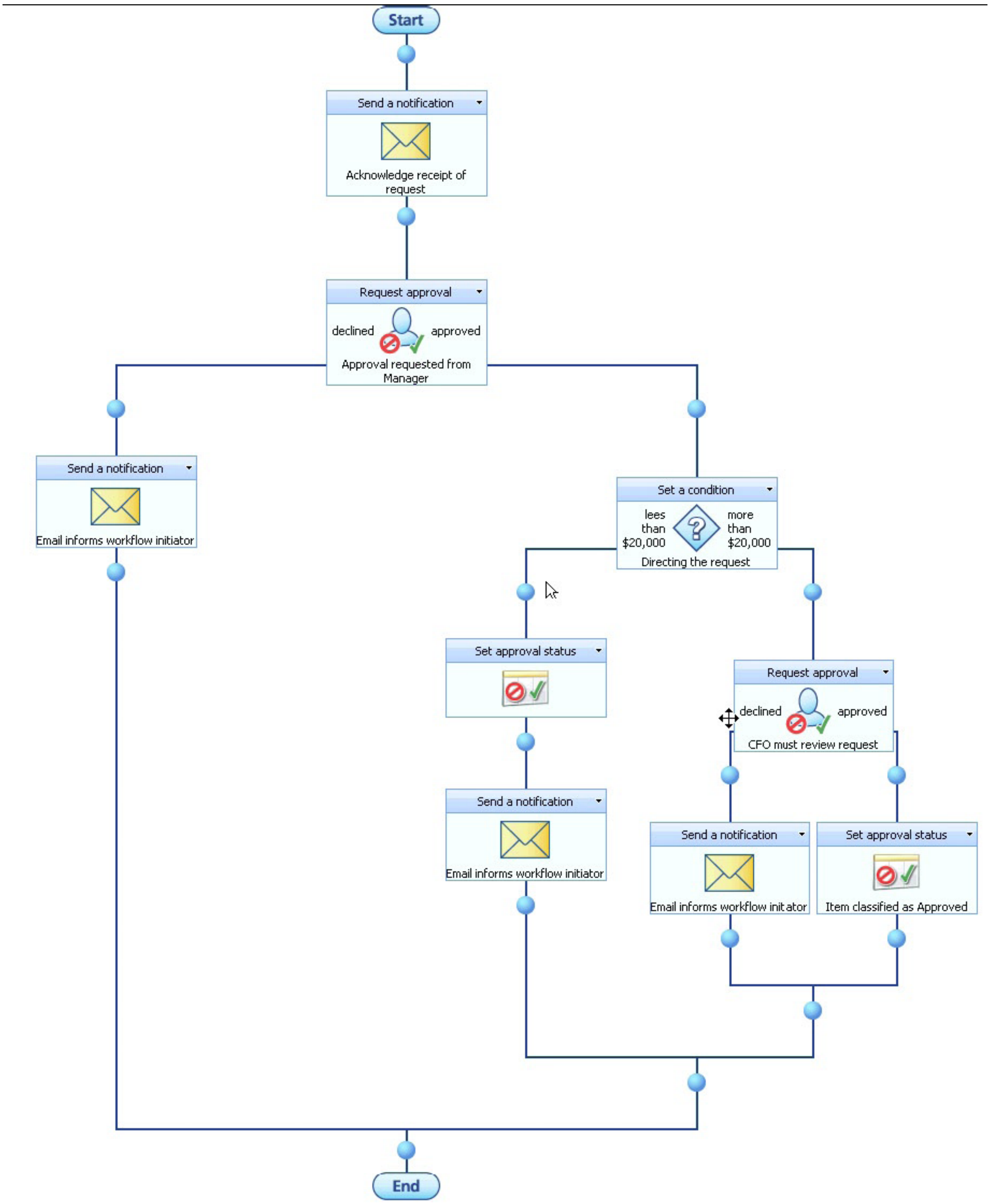
Tutorial 2:

Capital Expenditure Request Workflow creation



www.nintex.com sales@nintex.com
© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.

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.

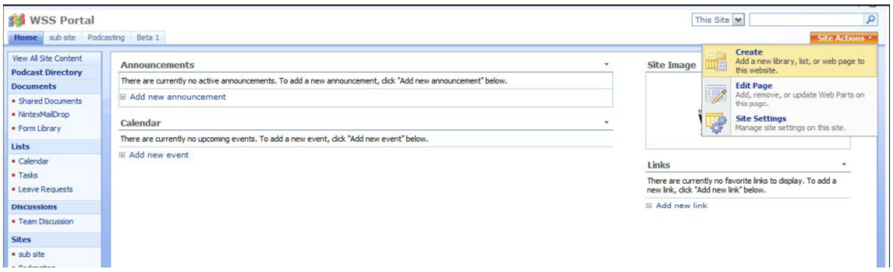
Furthermore, this tutorial assumes that the SharePoint system you are accessing is fully and correctly configured.

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

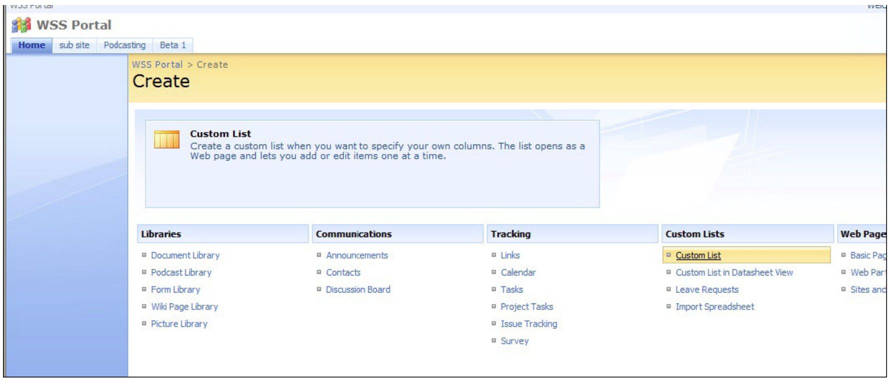
www.nintex.com sales@nintex.com
© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.

Tutorial 2 – Part 1:

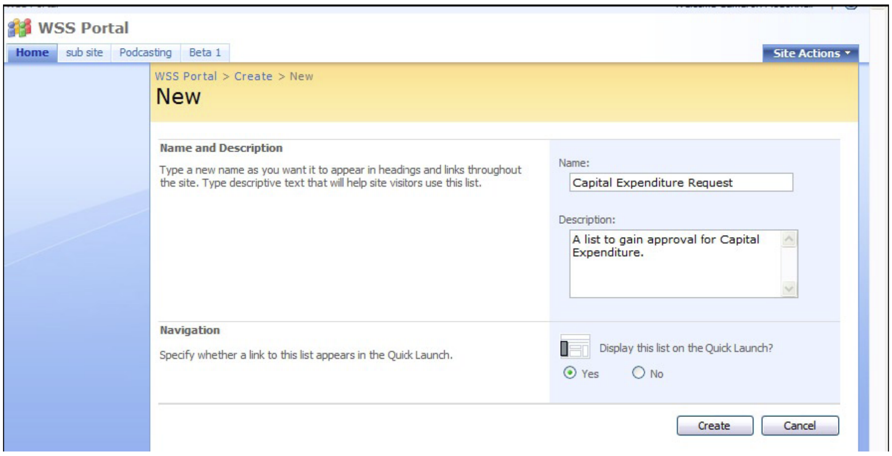
Creating the Capital Expenditure custom list in SharePoint 2007



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”.

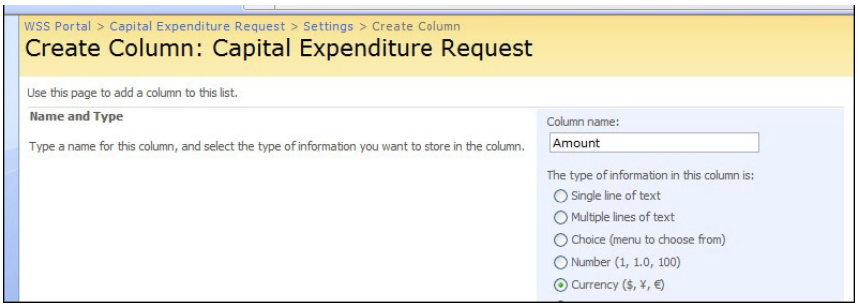


3. Type a name and appropriate description for the list and click “Create”.

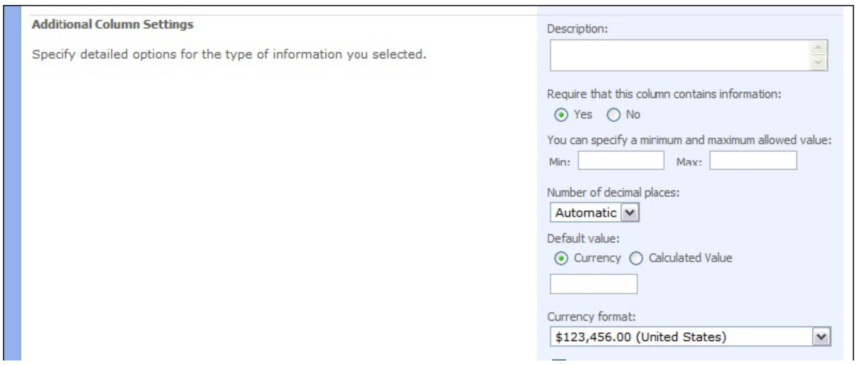
4. You will be located in the “Capital Expenditure Request” custom list. Now activate the settings dropdown and click on “List Settings”.

www.nintex.com sales@nintex.com
© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.

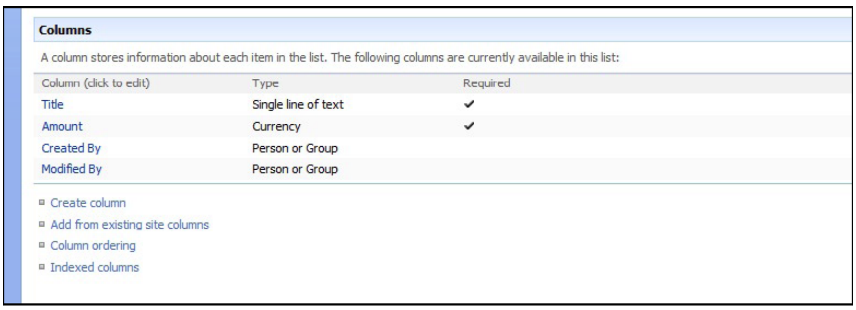
5. In the "Customize' page that loads, click on "Create Column".



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



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

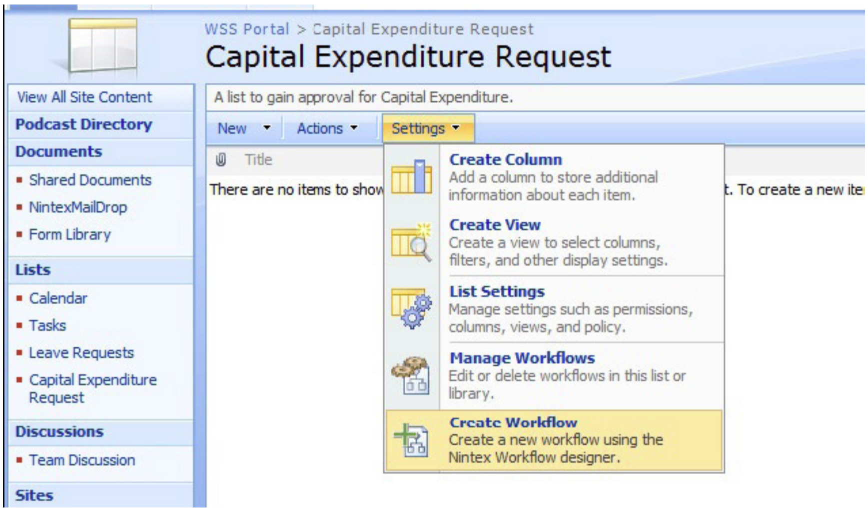


8. Now the list-item's title will be required and so will filling-in an amount. This is only a simple example of the information that could be required - a more realistic example would require descriptions and various other details. Now navigate back to the list using the bread-crumb trail above the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

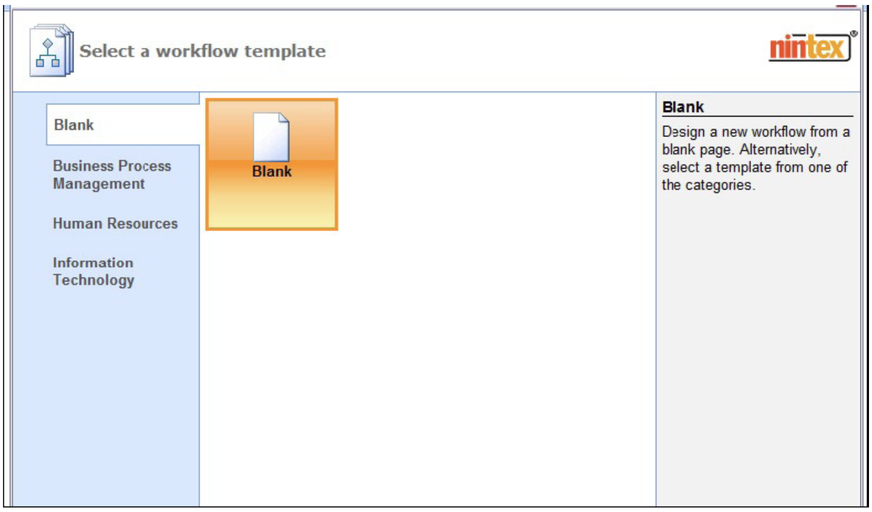
www.nintex.com sales@nintex.com
© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.

Tutorial 2 – Part 2:

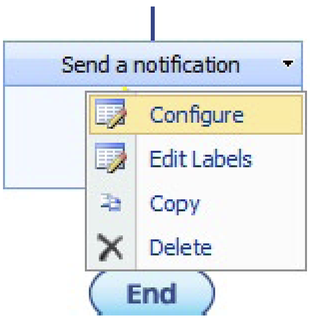
Creating the workflow – notification configuration



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

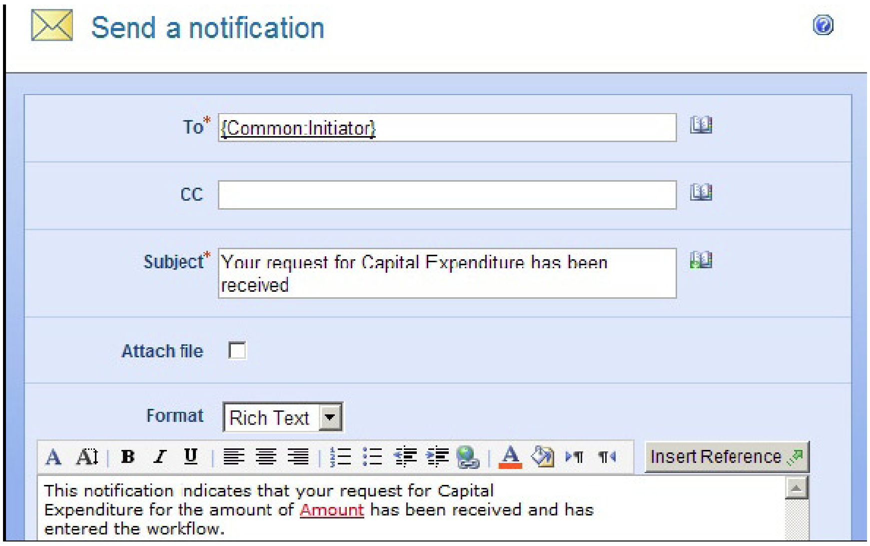


2. From the Template Picker that pops up, double-click “Blank Workflow”.

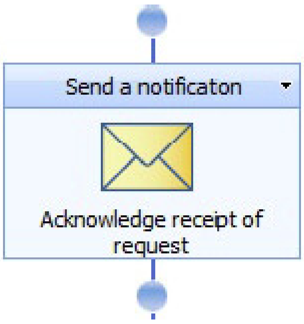


3. Drag and drop a “Send a notification” action and click on the “Configure” link or double-click the action’s icon.

www.nintex.com sales@nintex.com
© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.
Microsoft GOLD CERTIFIED Partner



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.



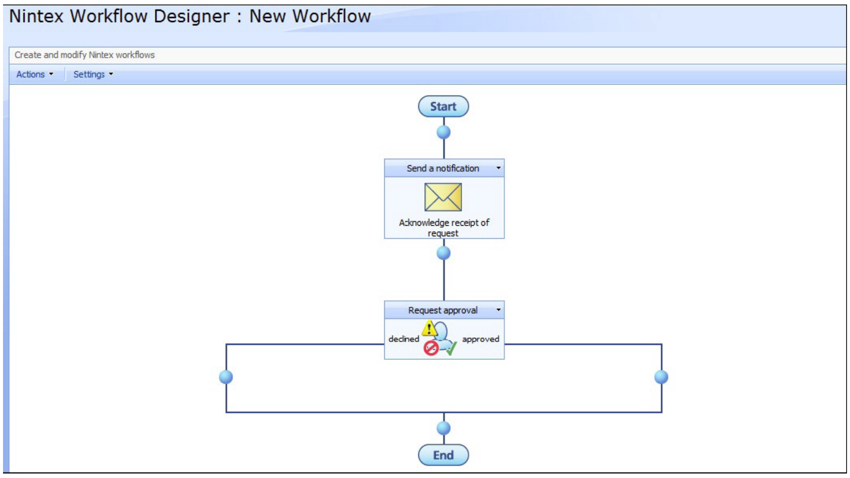
5. You can now set an appropriate label for the action.

© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.

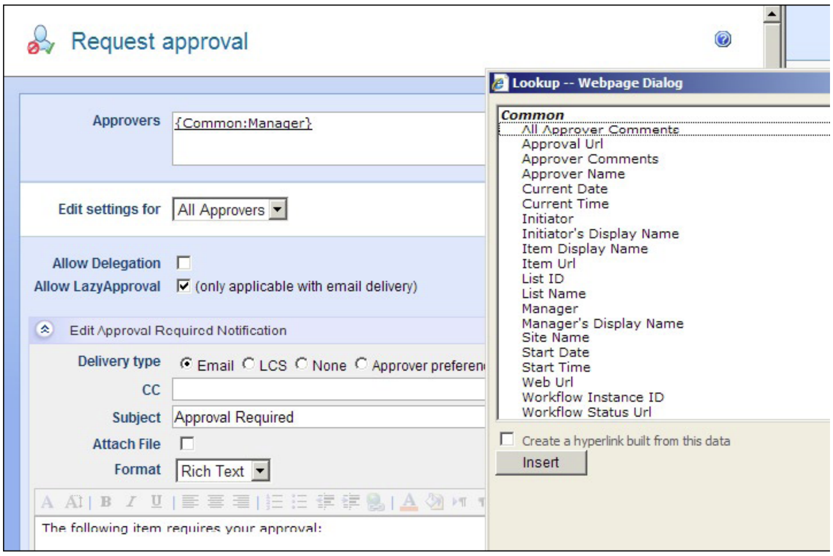
Microsoft GOLD CERTIFIED Partner

Tutorial 2 – Part 3:

Creating the workflow – “Approver Request” configuration



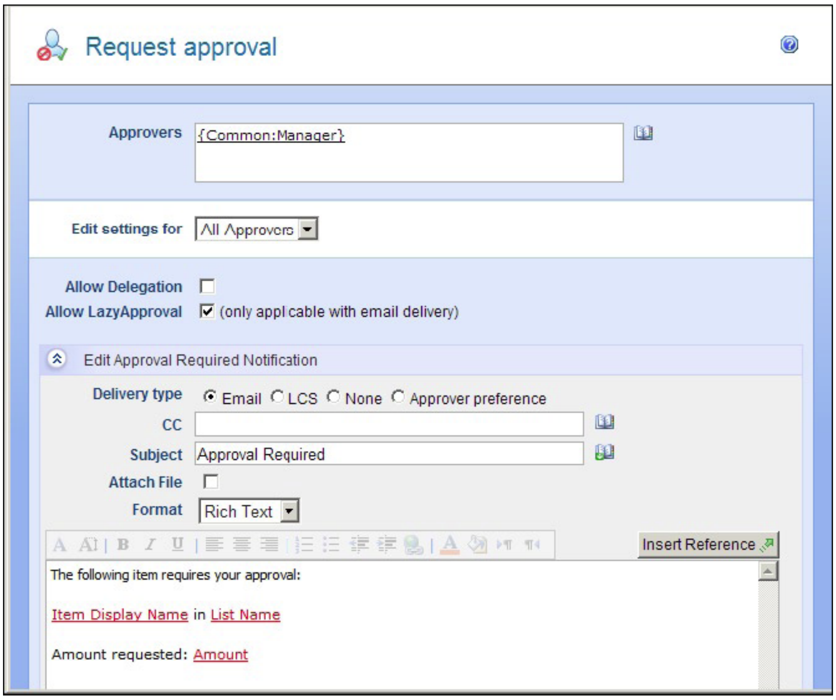
1. Now Drag on a “Request Approval” action, click the “Configure” link.



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.

www.nintex.com sales@nintex.com
© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.
Microsoft GOLD CERTIFIED Partner

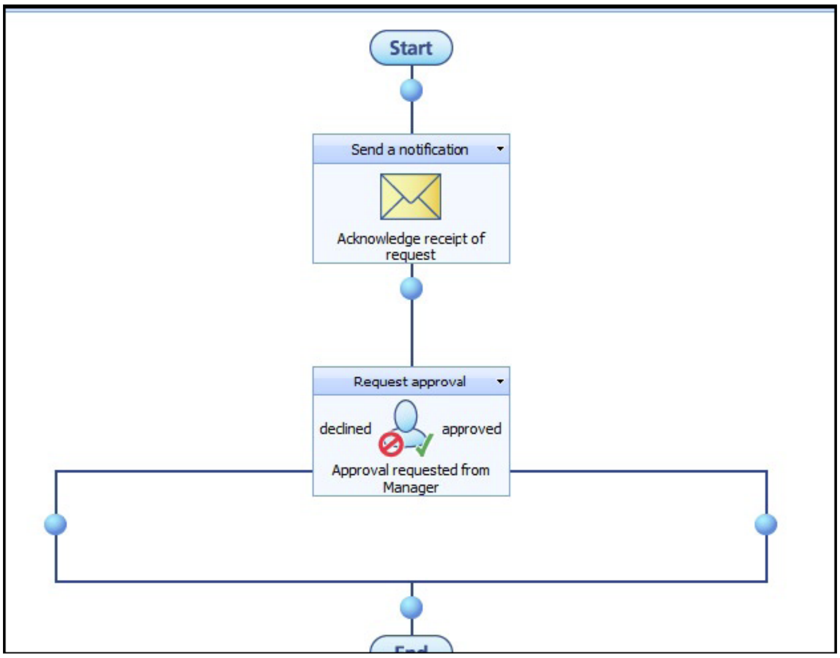


3. The finished notification message should look something like the screenshot to the left. For the sake of the tutorial, only a brief message has been added here.

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.

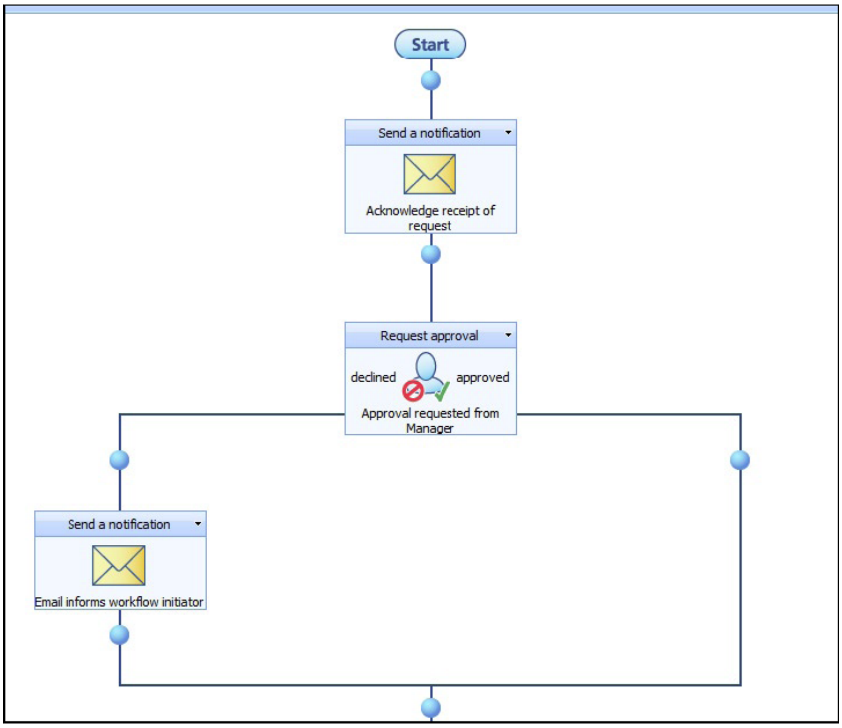
The "Approval Option" can either be "All Must Approve", "First response applies" or "Only one approval is required" because there is only one user.

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.

www.nintex.com sales@nintex.com
© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.

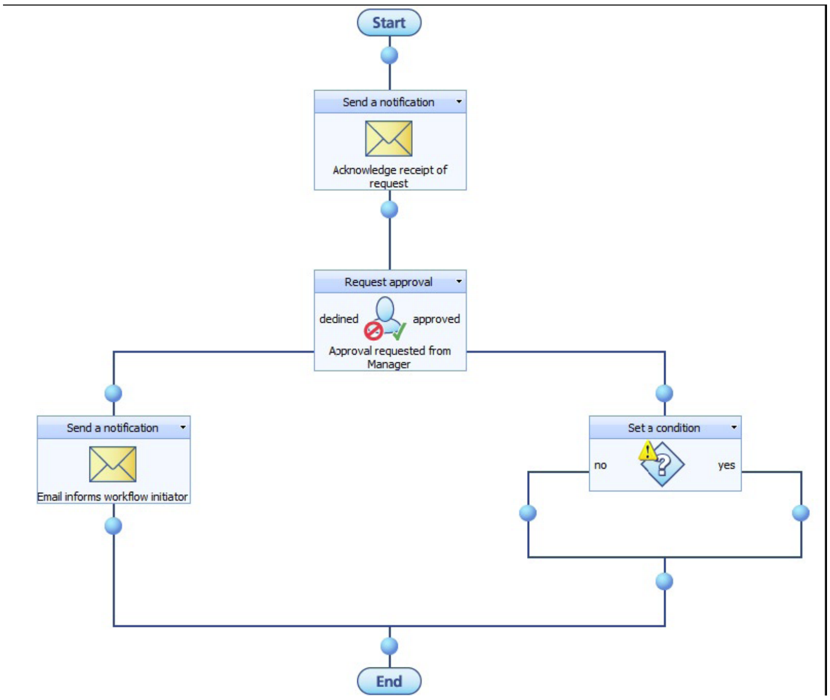


5. Now drag, drop and configure a "Send a notification" action (and labels) that is sent to the initiator informing him/her when the decision is "Declined". A good idea for that sort of notification is to include the Approver's comments in the body.

www.nintex.com sales@nintex.com
© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.
Microsoft GOLD CERTIFIED Partner

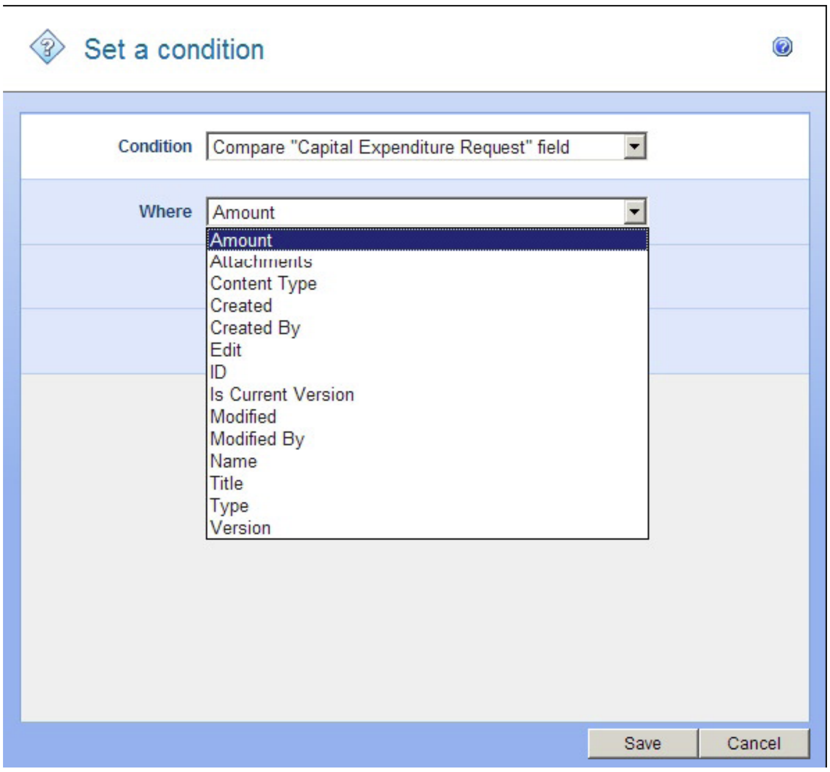
Tutorial 2 – Part 4:

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.

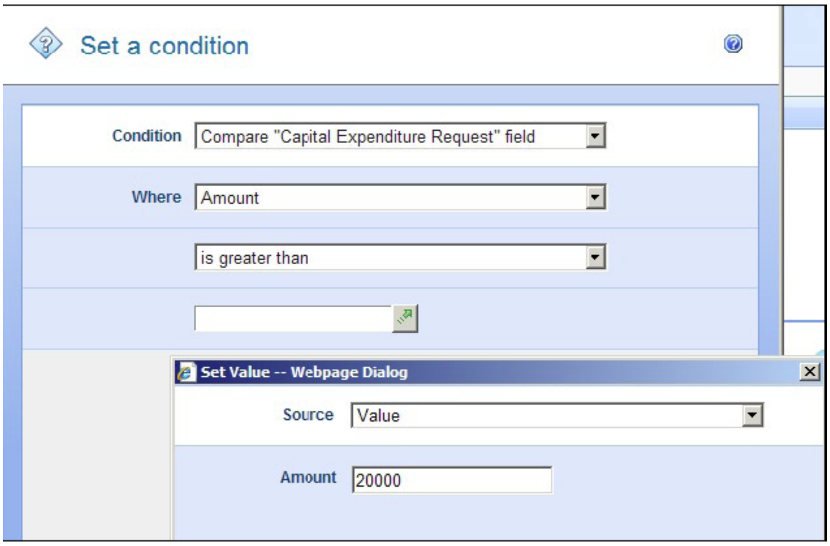
Drag and drop a “Set a condition” action from the “Commonly used” or “Logic and flow” palettes onto the workflow, then click its “Configure” link.



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.

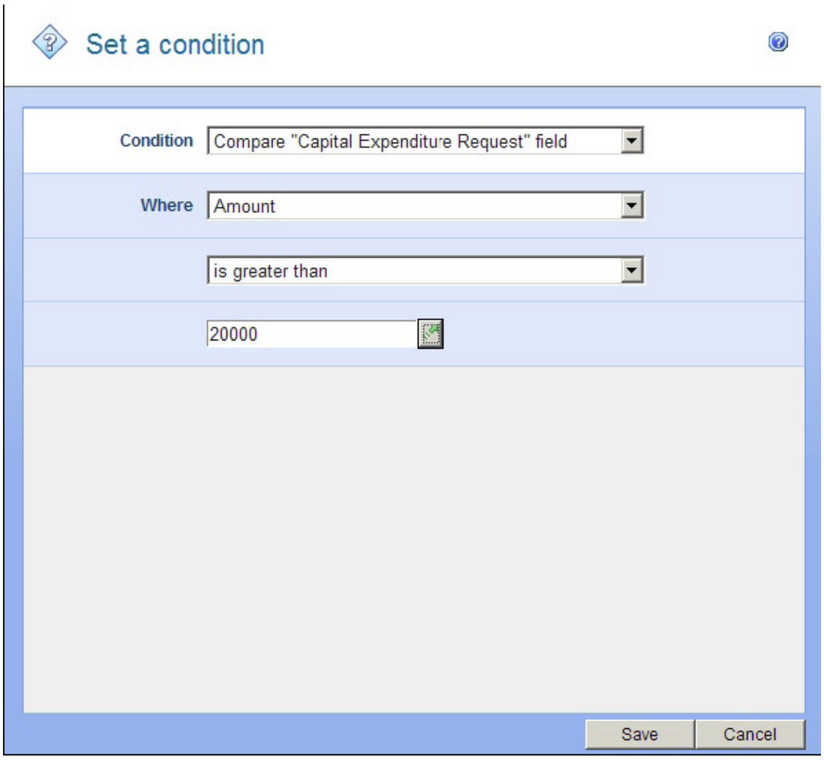
www.nintex.com sales@nintex.com
© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.
Microsoft GOLD CERTIFIED Partner



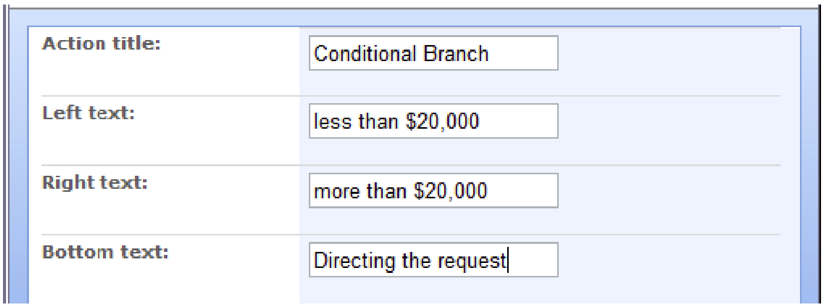
3. The next drop-down (the third) allows us to choose a condition type for our “Conditional Branch”. In this case the appropriate condition type is “is greater than”.

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”.

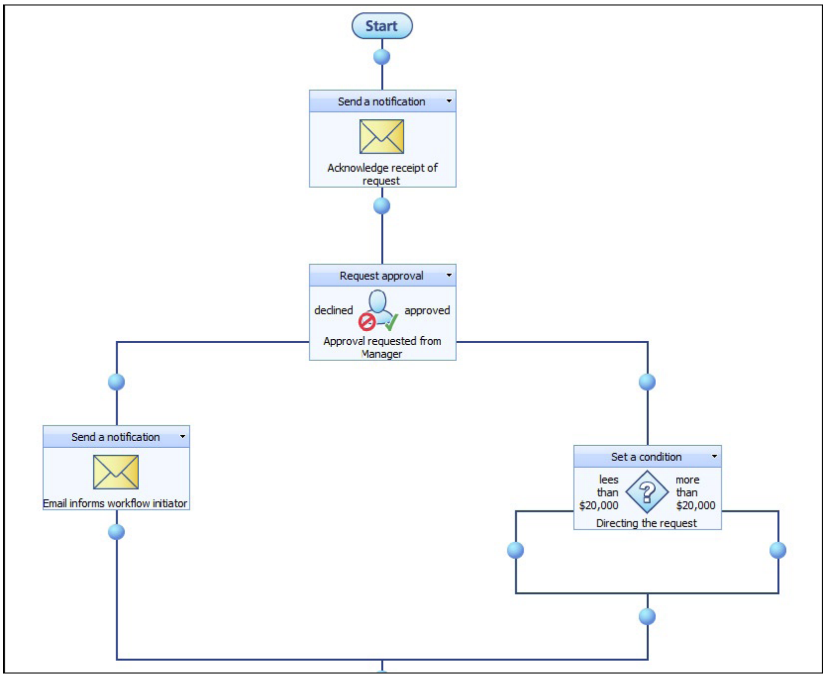


4. The condition should now be able to be read in relatively plain language: “The amount is greater than 20,000”. With the condition statement complete, click “Save”.



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

www.nintex.com sales@nintex.com
© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.
Microsoft GOLD CERTIFIED Partner

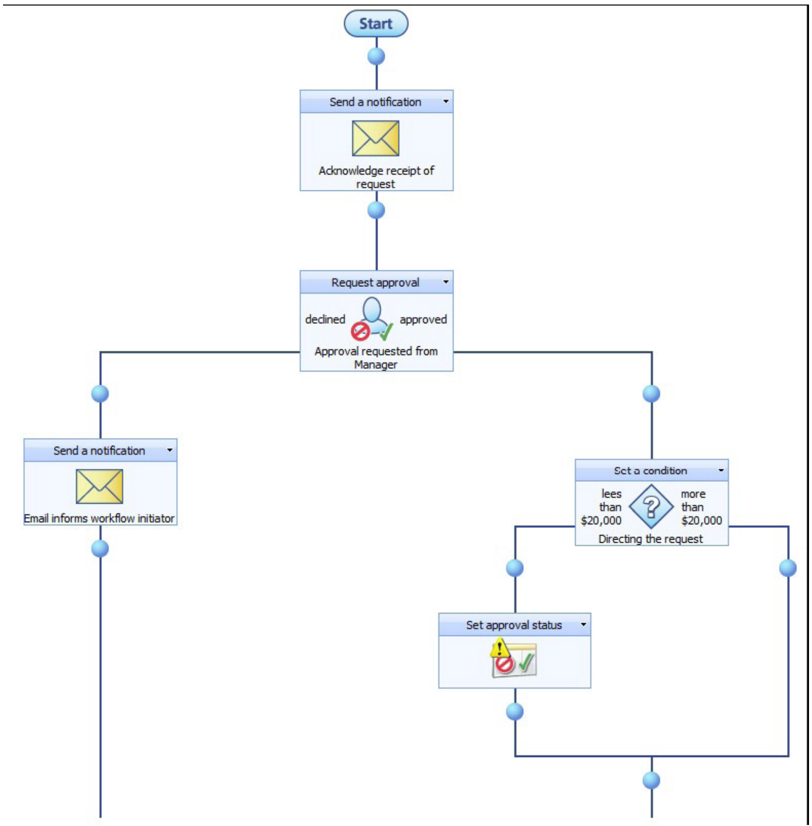


6. With the "Conditional Branch" action complete, the workflow should appear as it does to the left.

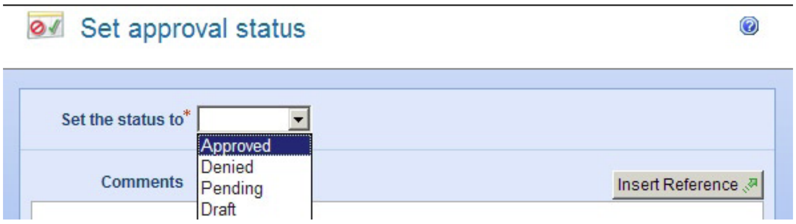
www.nintex.com sales@nintex.com
© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.

Tutorial 2 – Part 5:

Setting the Content Approval status



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.



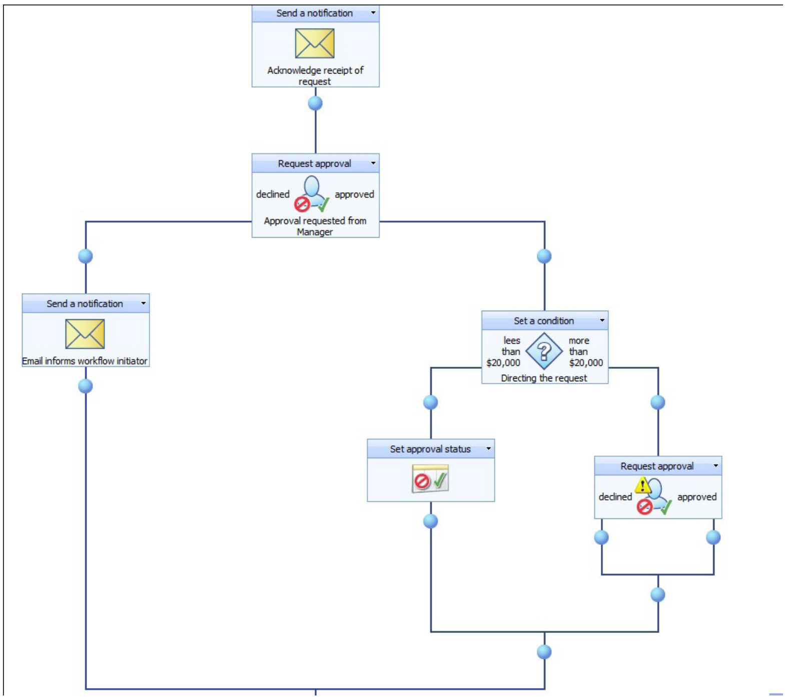
2. From the “Moderation Status” drop-down, select “Approved”, as in this case, if the first Manager approved the request and it was under $20,000 then the request will have met the conditions necessary to proceed.

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.

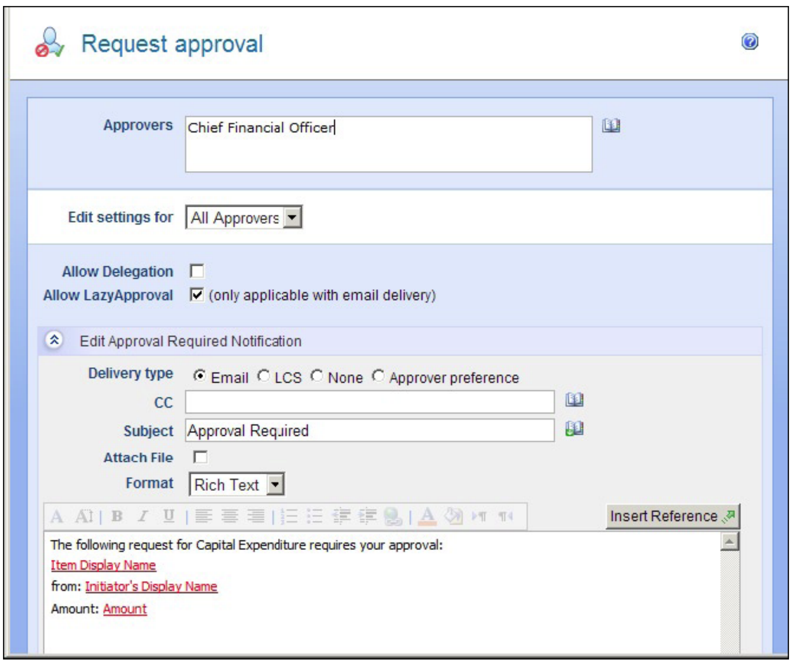
www.nintex.com sales@nintex.com
© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.
Microsoft GOLD CERTIFIED Partner

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.

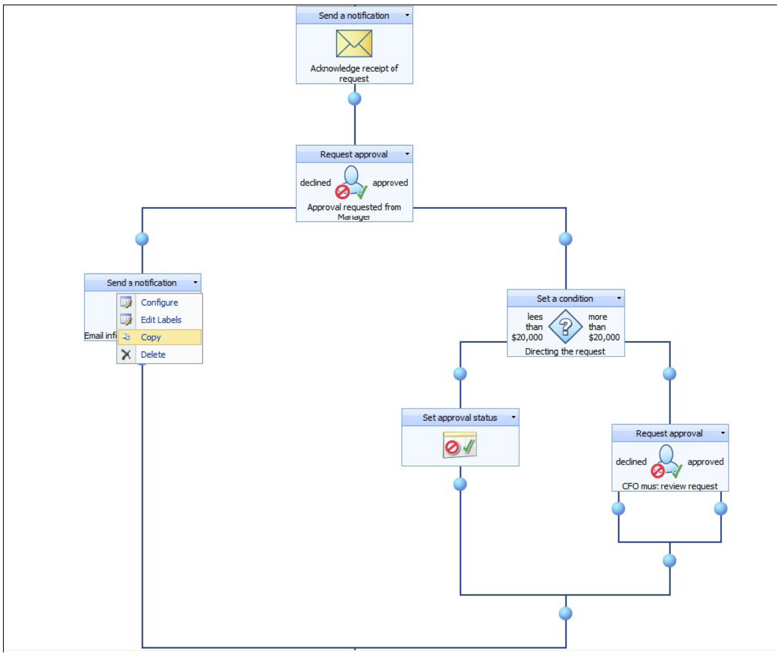
As usual, fill in the notification options to suit your requirements and click "Save".

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

www.nintex.com sales@nintex.com
© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.
Microsoft GOLD CERTIFIED Partner

Tutorial 2 – Part 7:

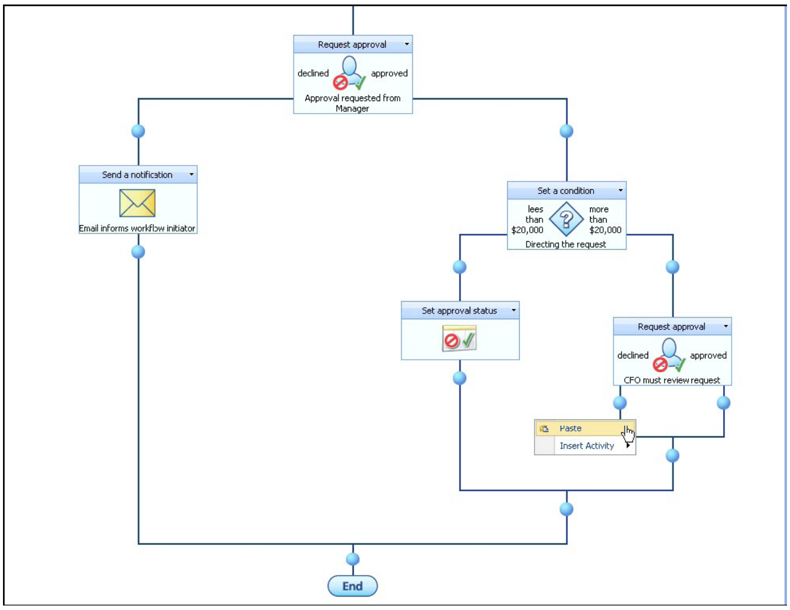
Configuring the remaining action – copying and pasting actions



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

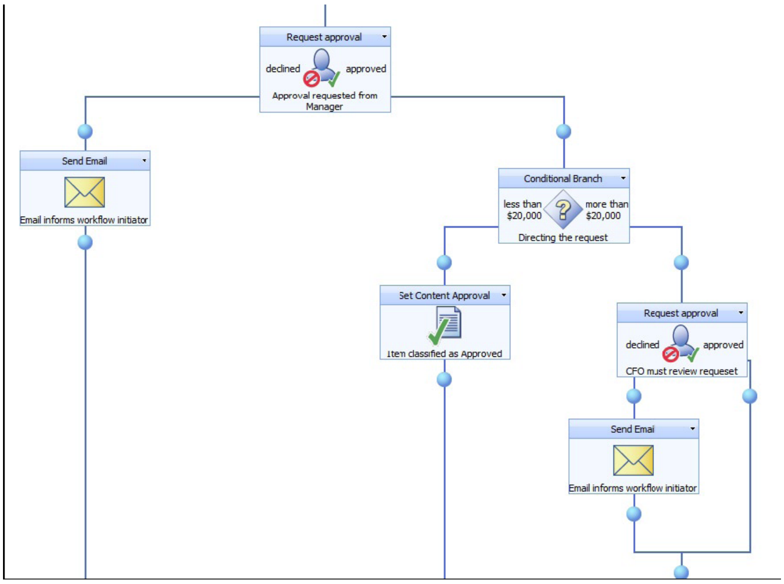
Essentially, the rest of this workflow is about adding actions that are very similar to some that have already been created. So rather than configure them from scratch again we can copy and paste them then make the minor changes that may be necessary.

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

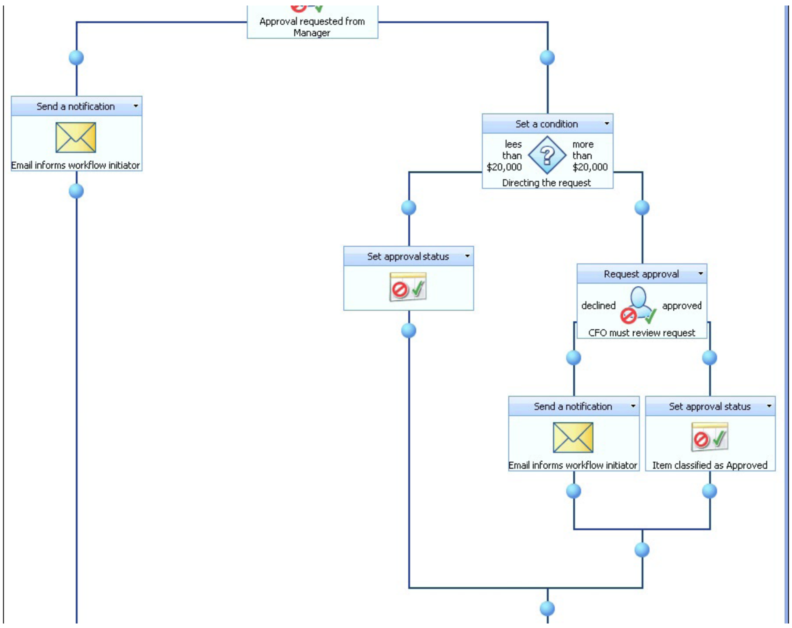


2. Then right click on the pearl where you want the action copied to and click the “Paste” option.

www.nintex.com sales@nintex.com
© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.
Microsoft GOLD CERTIFIED Partner



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



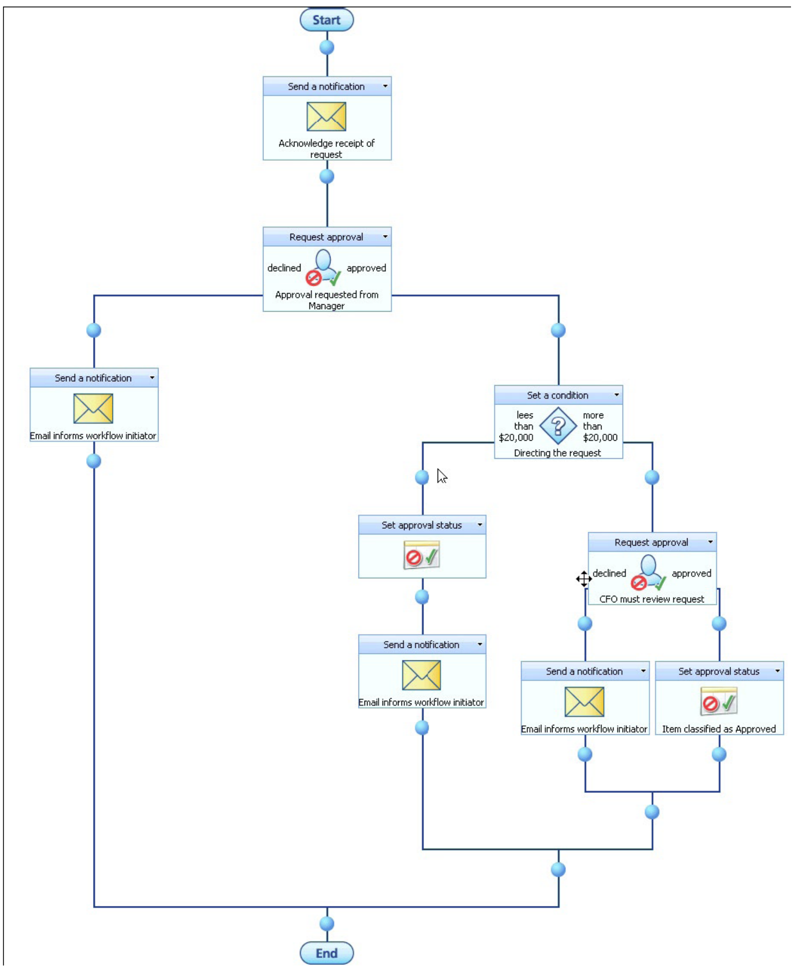
4. The copy and paste process is repeated for the “Set approval status” action...

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

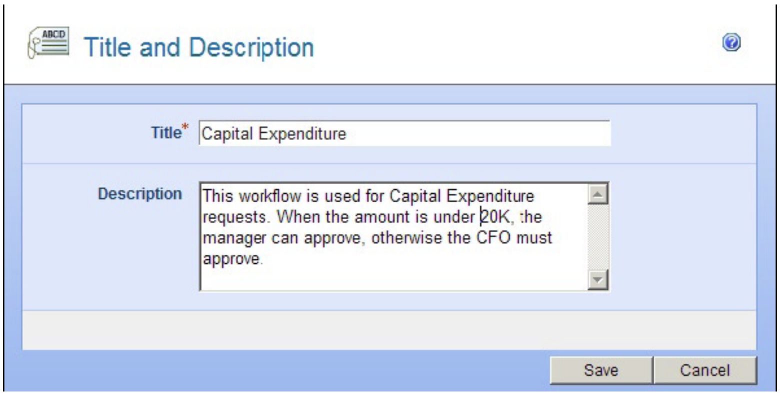
www.nintex.com sales@nintex.com
© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.
Microsoft GOLD CERTIFIED Partner

Tutorial 2 – Part 8:

Completing the workflow

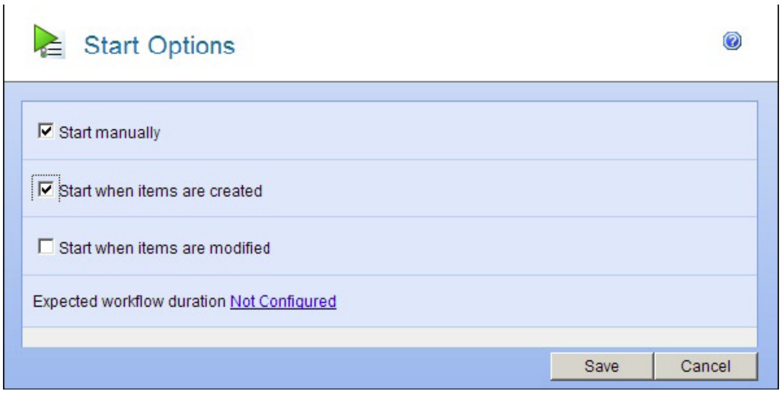


1. The almost complete workflow process should now appear like the screenshot to the left.

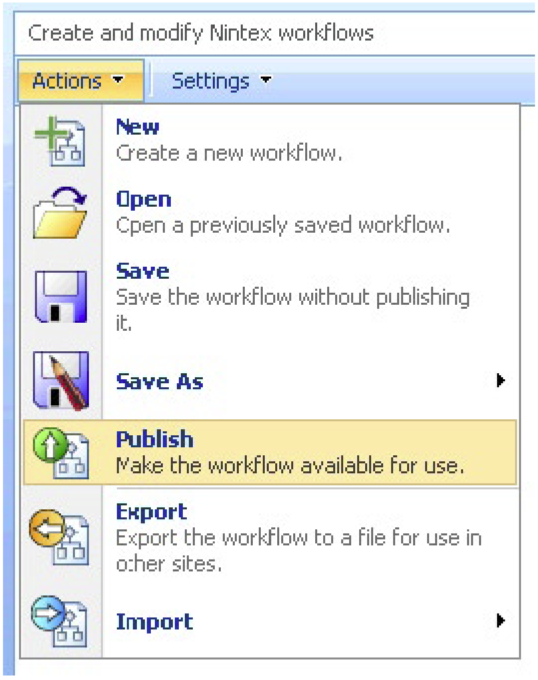


2. To finish off the workflow, click the “Settings” button near the top of the page then “Title and Description” and enter the details as required. Then click the “Save” button.

www.nintex.com sales@nintex.com
© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.



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

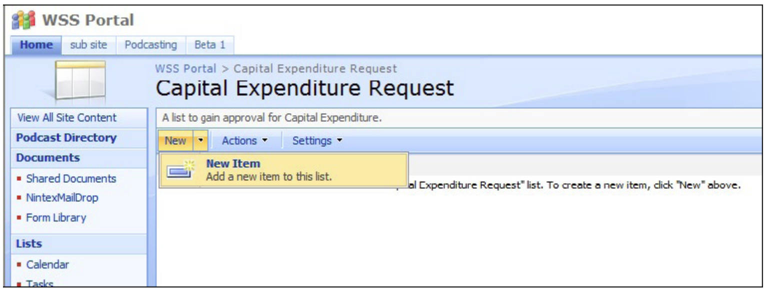


4. On the workflow designer page, click the "Actions" button.
In this case we assume the workflow is ready to be used by the company so we use the "Publish" option, which saves the workflow and associates it with the list, ready for use.

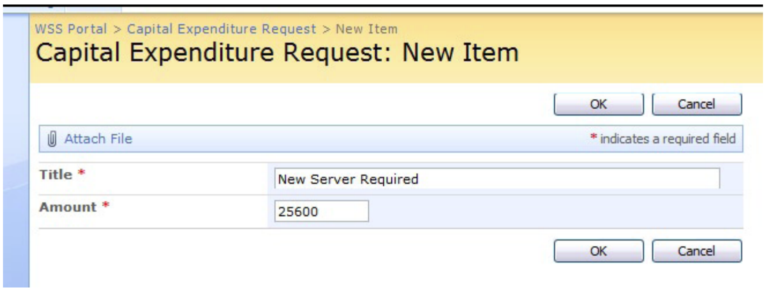
www.nintex.com sales@nintex.com
© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.
Microsoft GOLD CERTIFIED Partner

Tutorial 2 – Part 9:

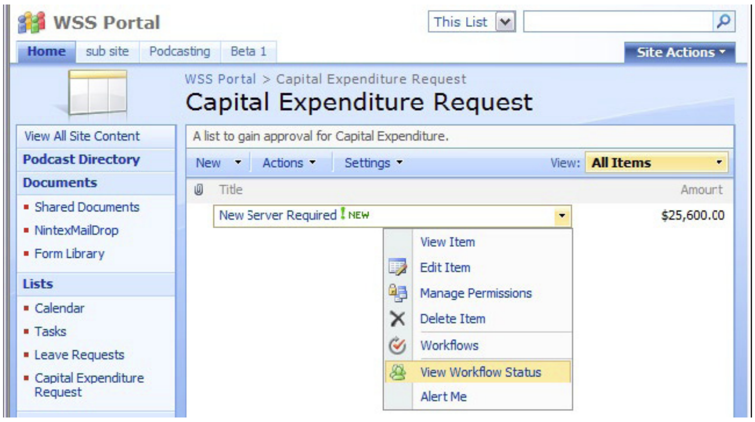
Using the workflow



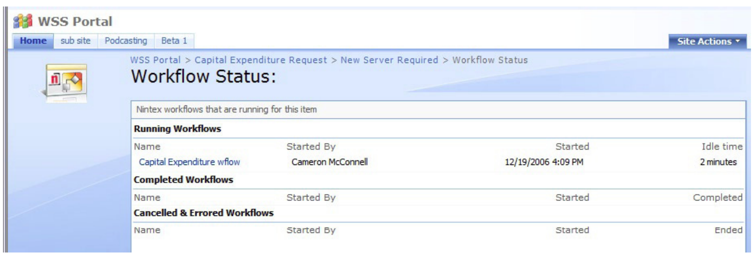
1. To use the workflow, we need to create a Capital Expenditure Request. Return to the custom list created earlier and click the new button and select "New Item".



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

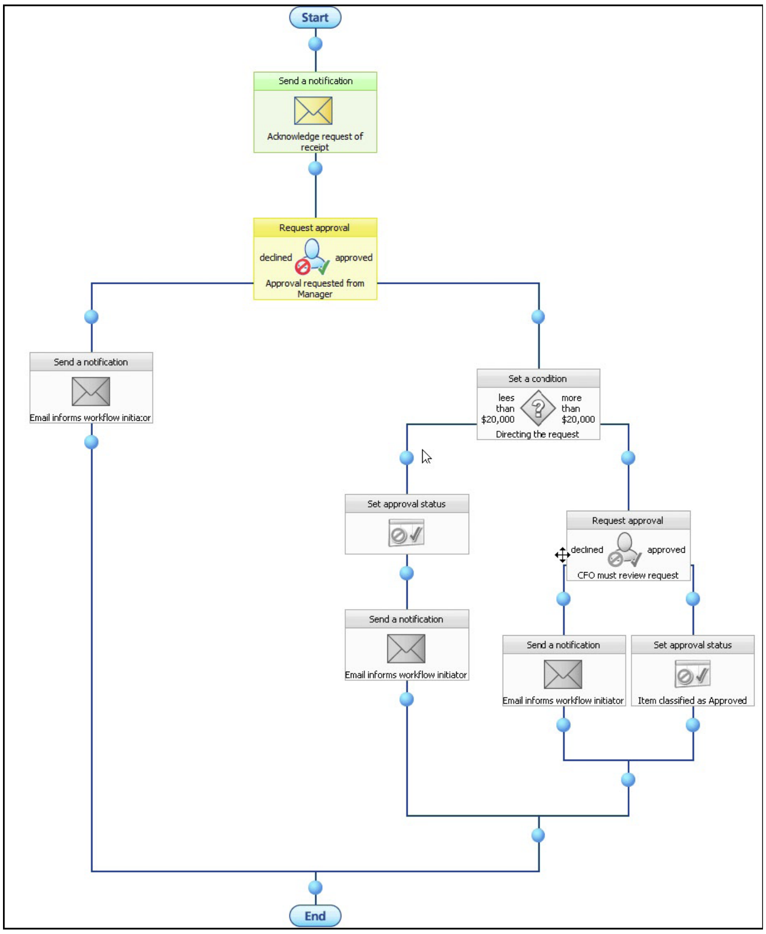


3. We set the workflow to begin when new items were added and to confirm that the workflow is in progress, activate the item drop-down and click the "View Workflow Status" link.



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.

www.nintex.com sales@nintex.com
© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.
Microsoft GOLD CERTIFIED Partner



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

www.nintex.com sales@nintex.com
© 2007 Nintex LLC, All rights reserved. Errors and omissions excepted.

Microsoft GOLD CERTIFIED Partner