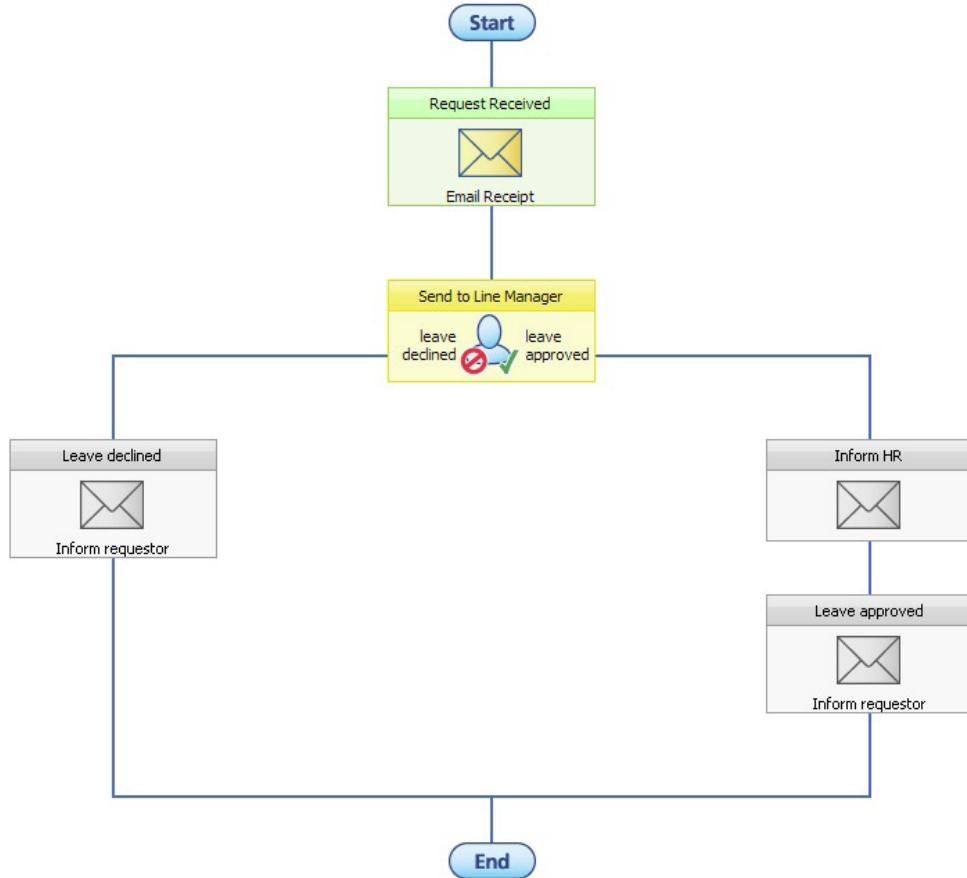


Tutorial 1:

Leave Request Workflow creation



In this tutorial, we are going to create the workflow shown above. It is a relatively simple business process which we will automate to enable employees to apply for leave online.

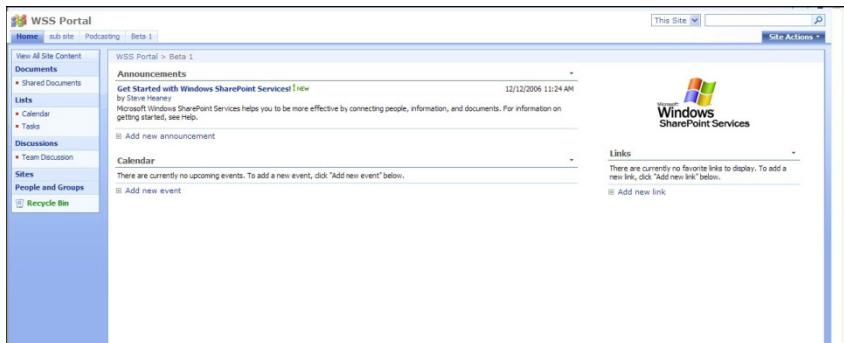
In this case the workflow will be set up to acknowledge receipt of the application for leave, send a request for approval to the user's "Manager" and act on the "Manager's" decision.

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.

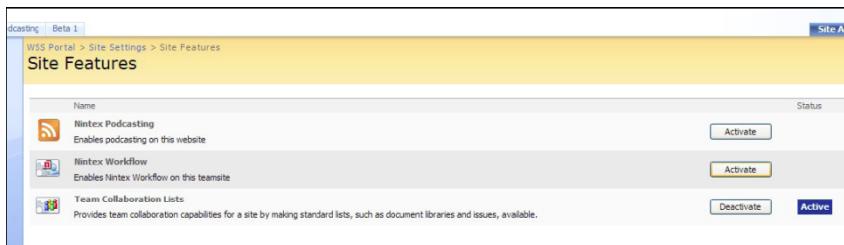
Tutorial 1 – Part 1: Enabling Nintex Workflow 2007 in a new site



1. Navigate to the SharePoint 2007 site you wish to use for this tutorial.



2. To enable Nintex Workflow, click Site Settings then "Site Features".

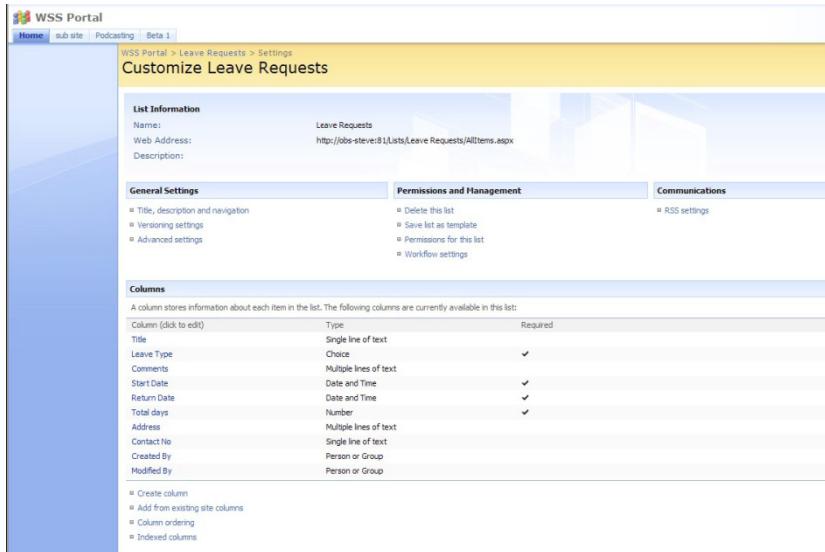


3. You will see Nintex Workflow there as an option. Click the "Activate" button then return to the home page of the site.

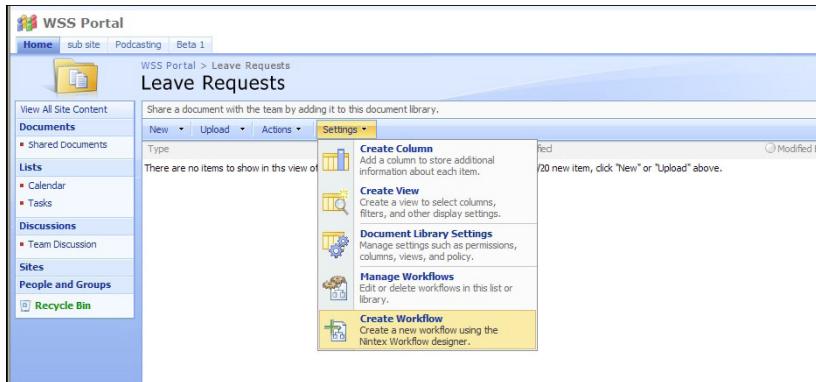


Tutorial 1 – Part 2:

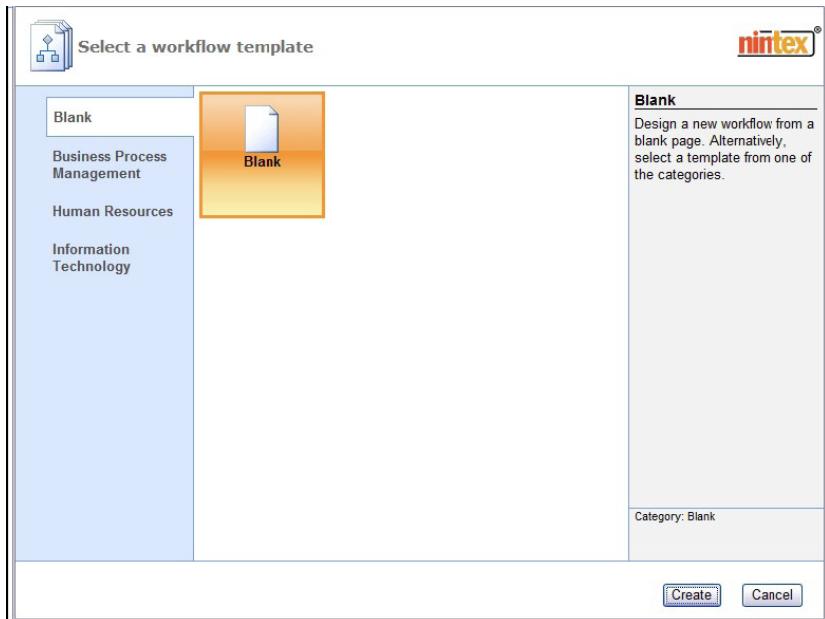
Creating a Nintex Workflow



This screenshot shows the 'List Information' section of the SharePoint 'Leave Requests' list settings. It includes fields for Name, Web Address, and Description. Below this are sections for 'General Settings', 'Permissions and Management', and 'Communications'. Under 'General Settings', there are options for Title, description and navigation, Versioning settings, and Advanced settings. The 'Permissions and Management' section includes Delete this list, Save list as template, Permissions for this list, and RSS settings. The 'Communications' section includes RSS settings. At the bottom, there's a 'Columns' section listing various columns like Title, Leave Type, Comments, Start Date, Return Date, Total days, Address, Contact No, Created By, Modified By, and several more. Each column has its type (e.g., Single line of text, Choice, Date and Time) and required status indicated.



This screenshot shows the 'Leave Requests' library settings page. The left sidebar shows 'Documents' selected. The main area has a 'New' button, an 'Upload' button, and an 'Actions' dropdown. The 'Settings' dropdown is open, revealing options: 'Create Column' (highlighted in yellow), 'Create View', 'Document Library Settings', 'Manage Workflows', and 'Create Workflow'. The 'Create Column' option is described as adding a column to store additional information about each item.



This screenshot shows the 'Select a workflow template' dialog. On the left, there's a sidebar with categories: 'Blank', 'Business Process Management', 'Human Resources', and 'Information Technology'. Under 'Blank', there's a large orange button labeled 'Blank'. To the right, there's a detailed description of the 'Blank' template: 'Design a new workflow from a blank page. Alternatively, select a template from one of the categories.' At the bottom, there are 'Create' and 'Cancel' buttons.

1. For the purposes of the tutorial, you will need to create a List to handle Leave Requests. Ensure that suitable columns are available in the SharePoint list. These are data fields that will be used in the workflow. In this tutorial we will need:

Leave Type

Start Date

Return Date

Total Days

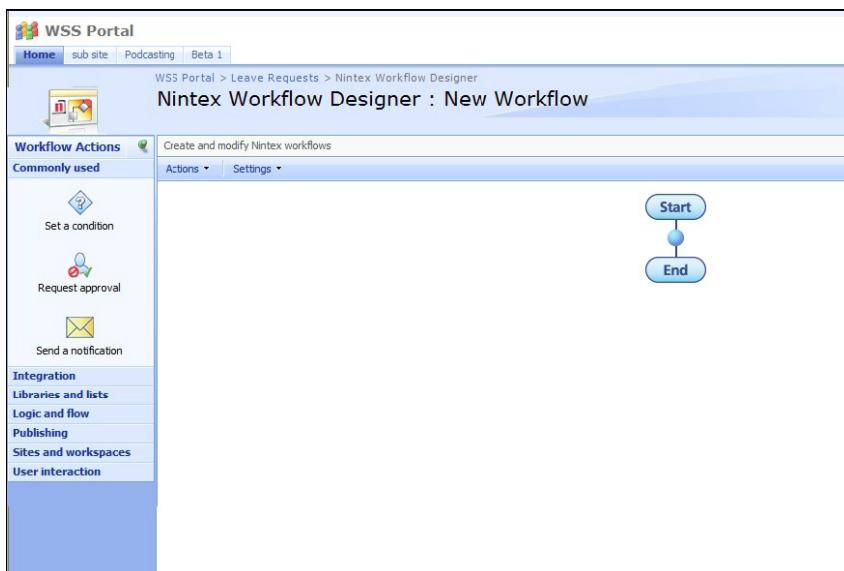
The screenshot to the left shows the minimum required fields.

2. From within your Leave Request list, activate the "Settings" dropdown menu then click on "Create Workflow".

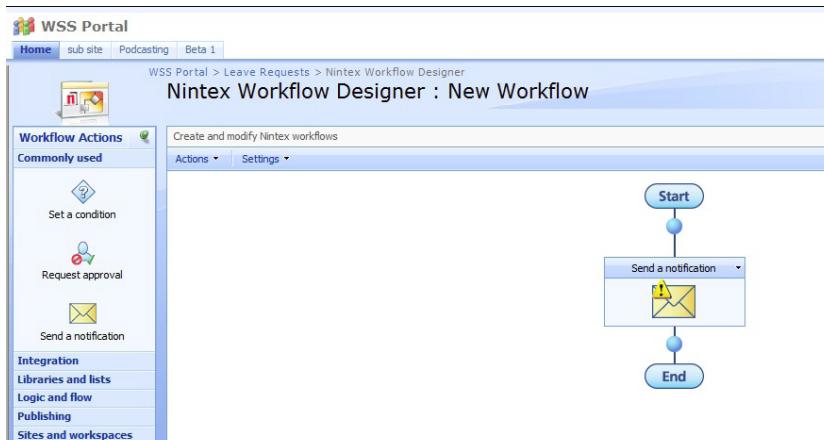
3. A Template Picker will load. For this tutorial choose "Blank Workflow". You can double click the option or select it and click the button at the bottom of the page. For future reference you will be able to choose from a variety of pre-defined, fully editable workflows.

Tutorial 1 – Part 3:

Adding and Configuring a “Send notification” Workflow Action

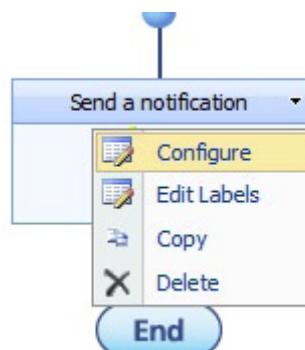


1. Once the template has been chosen, the workflow is displayed. Having chosen “blank”, only the Start and End blocks are shown, as well as a blue “pearl”. When activities are added to a workflow they are dragged and dropped onto a pearl from the Actions palette. Alternatively, you can right click on a pearl and select an action from the list that appears. The “Commonly used” palette is shown expanded and opens by default. The other palettes are shown collapsed in this screenshot. They contain sets of related actions.



2. The first action we add to the workflow is “Send a notification”. It is dragged from the palette and dropped onto the pearl. Pearls above and below the “Send a notification” action now appear to allow other actions to be added.

In this scenario the notification is intended as a courtesy, acknowledging receipt of the request.



3. To configure the “Send a notification” action, activate the drop-down menu by left-clicking anywhere in the action’s top banner area.

Then hover down to “Configure” and click it. Alternatively you can double-click the action’s icon.

Send a notification

To*

CC

Subject*

Attach file

Format Rich Text Plain Text

Rich Text Editor

Delivery type* Email LCS User preference

- 4.** A configuration dialog box is loaded for the “Send a notification” action. This first email is our acknowledgement of receipt and we want it sent to the initiator of the workflow.

Click the lookup button to the right of the text field to add a recipient.

Select People and Groups -- Webpage Dialog

Search for people and groups from the directory, add external email addresses or select addresses from the lookup list.

Internal Search
Add external email address
Lookup

Common
Initiator
Manager
Item Properties
Checked Out To
Created By
Modified By

Add

Addresses

- 5.** A “Lookup” box is loaded and options displayed. In this case we want the “initiator” to be emailed. Expand the “Lookup” section, select “Initiator” and click “Add”. “Initiator” will be added to the Addresses field below. Click the “OK” button when you are finished.

Workflow

as Snippet | Save as Template

Email -- Webpage Dialog

ail

{Common:Initiator}

Leave request - Leave Type -

Mode: Rich Text



6. The rest of the email can be composed in a similar way by inserting lookups. The lookups appear red and will be filled in with real data when the workflow is activated.

 Send a notification 

To*: {Common:Initiator} 

CC 

Subject*: Leave Request - Leave Type - Initiator's Display Name 

Attach file

Format: Rich Text



Your leave request has been received and forwarded to Manager's Display Name for review.

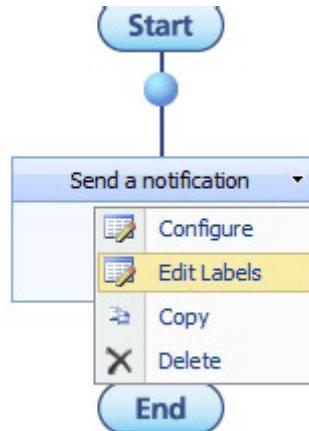
Leave details
 Type: Leave Type
 Start Date: Start Date
 Return date: Return Date

Delivery type*: Email LCS User preference

7. For the purpose of the tutorial, please complete the rest of the notification so it appears similar to the screenshot to the left. Then click "Save". To add details about the document, list item, library or list, use the "Insert Reference" button, which works in a similar way to the Lookup feature.

Tutorial 1 – Part 4:

Editing the Labels of a Workflow Action



1. With the email configuration saved, we can make the appearance of this workflow action more descriptive by applying labels.

Activate the Action's drop down and click the "Edit Labels" link.



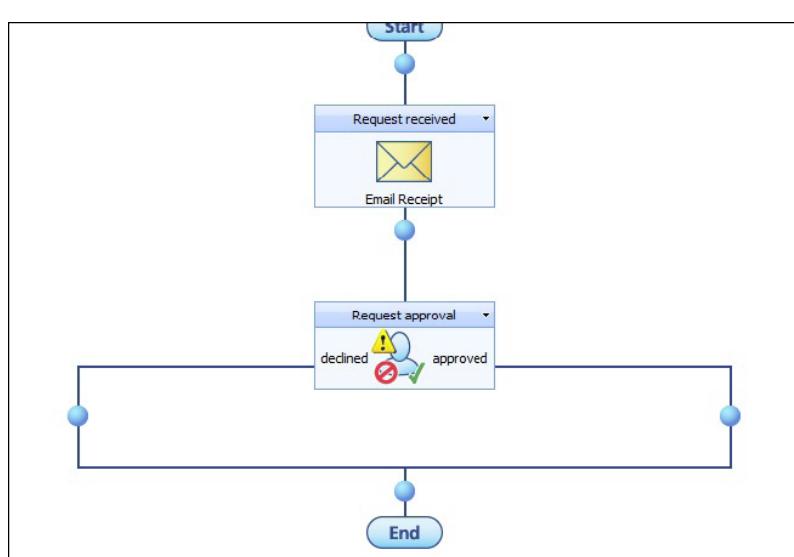
Set action labels

Action title	Request received
Left text	
Right text	
Bottom text	Email receipt

2. Enter text in the positions you deem appropriate and click the "Save" button (not shown).

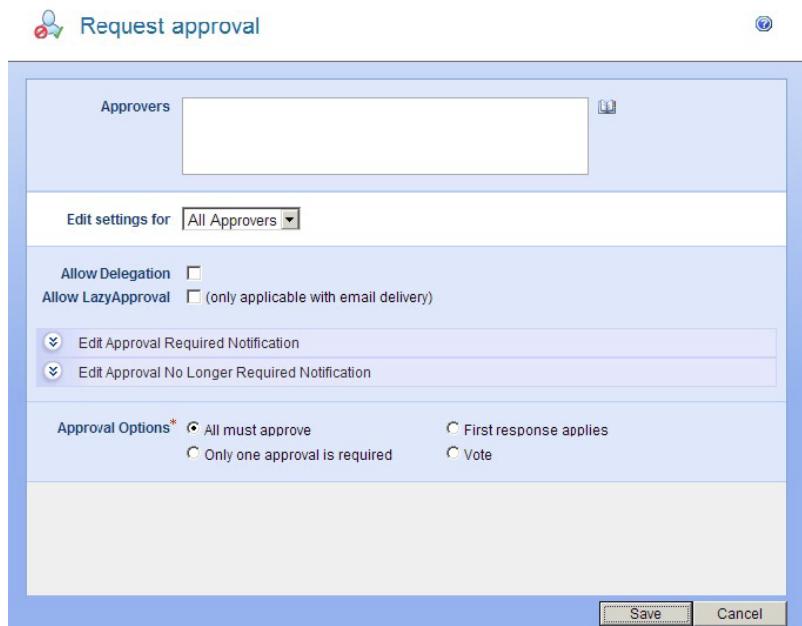
Tutorial 1 – Part 5:

Adding and Configuring a “Request Approval” action



1. We can now proceed with adding the next action to the workflow. In this case it's the “Request approval” action. The action is dragged from the palette and dropped onto the pearl below the Email action. The workflow designer draws the branches of the path automatically.

A yellow warning icon appears on the action to indicate that it has not been configured, which is our next step.



Request approval

Approvers

Edit settings for All Approvers

Allow Delegation Allow LazyApproval (only applicable with email delivery)

Edit Approval Required Notification
Edit Approval No Longer Required Notification

Approval Options* All must approve Only one approval is required First response applies Vote

Save Cancel

2. The Request Approval configuration dialog box lets you choose users as approvers and the approval conditions. The options are similar to those in SmartLibrary 2:

“All Must Approve”:

All selected users must approve the document or request for it to attain a status of approved.

“First response applies”:

The first person to respond can approve or reject the document or request and that decision will be the outcome.

“Only one approval is required”:

The first approval entered will cause the status to be approved. For a rejection to be recorded, all users would have to reject it.

“Vote”:

A minimum number of users who must approve can be set.

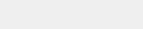
 Request approval

Approvers: {Common:Manager} 

Edit settings for: All Approvers 

Allow Delegation:
 Allow LazyApproval: (only applicable with email delivery)

 Edit Approval Required Notification

Delivery type: Email LCS None Approver preference
 CC: 

Subject: Approval Required 

Format: Rich Text 

A leave request has been received. The Leave details are:
 Staff member: [Initiator's Display Name](#)
 Start date: [Start Date](#)
 Return date: [Return Date](#)
 Total number of days: [Total Days](#)

3. Clicking the “Lookup” button allows you to add a user as in previous steps. Again, you can choose users from Active Directory, SharePoint or from a list of Workflow Properties (eg. initiator, user’s Manager).

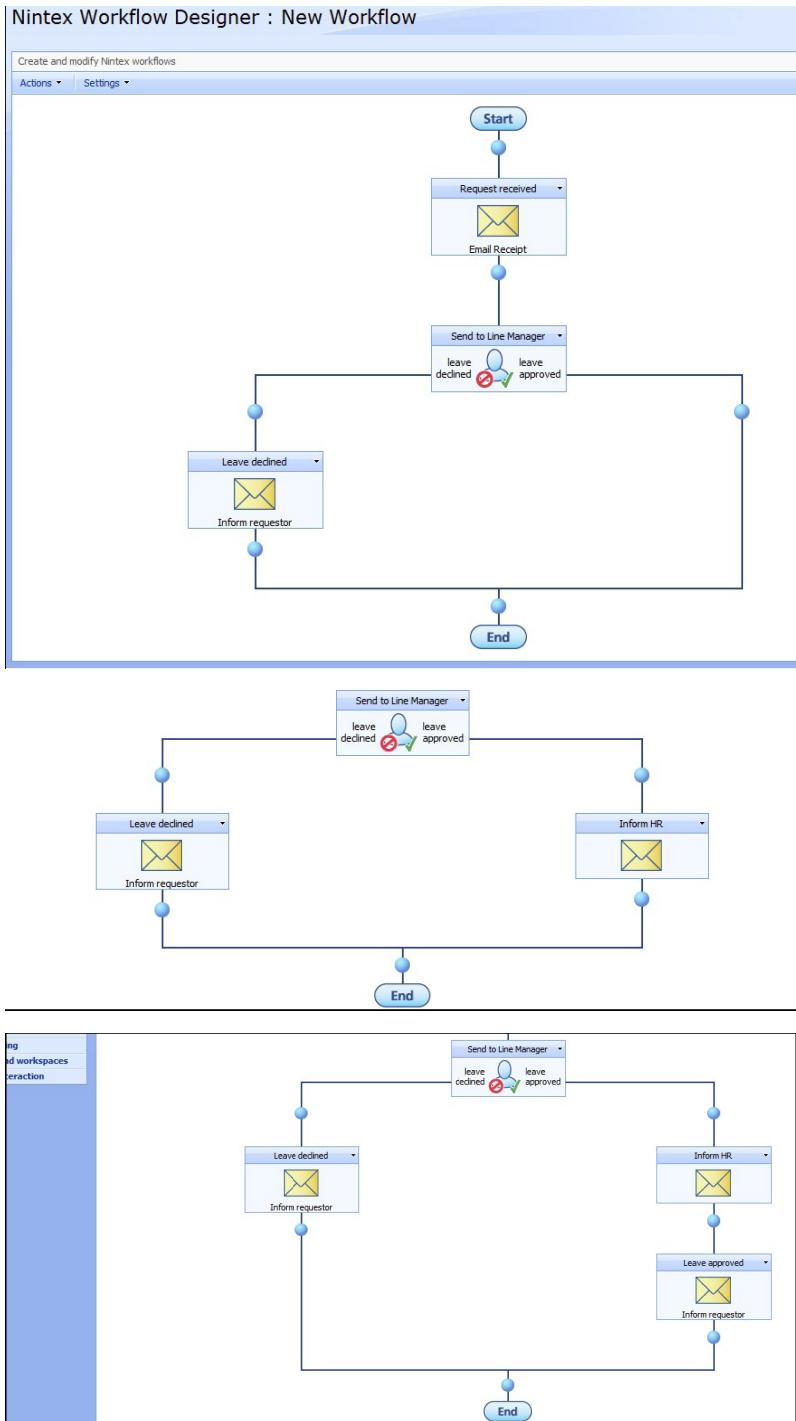
For this tutorial, add an actual user that you can consider to be the Manager (if you know that Active Directory has not been set up with that information), otherwise use the Manager lookup so it will be automatically populated when the workflow runs. This is also where notification options are set. Using the Field Lookup properties and “Insert Reference” link, you can set up the message to approximately match what we have to the left. Any information can be typed into the message body area. Click the “Save” button when you have finished.

4. Please note that in this version (different to SmartLibrary 2):

- a CC field is provided;
 - notifications can be sent by Email, SMS (option not shown) and Instant Messenger (specifically, Microsoft Live Communication Server - LCS).
- Please note:** Nintex does not provide support for LCS or SMS systems, they are the responsibility of the service provider within your organization.
- “LazyApproval” is provided - simply replying to the notification email with the appropriate word or words will register an approval or rejection. LazyApproval is only available when email is used.

Tutorial 1 – Part 6:

Adding and Configuring the Remaining Notification Actions



1. Now we can define the workflow actions for the two different scenarios of Approved and Rejected.

For Rejected we are choosing to email the initiator of the workflow informing them of the decision. After that, the workflow ends.

2. For the “Approved” scenario we choose to inform an appropriate person, such as the HR Manager, of the decision so the absence can be measured and resourced.

3. Naturally we also choose to inform the initiator of the decision.

Tutorial 1 – Part 7: Saving the workflow

Title and Description

Title*		Leave Request
Description	Use this workflow to process leave requests.	

- With our simple workflow now complete, we can configure its Settings by clicking the “Settings” button then choosing “Title and Description”, name the workflow and enter a brief description of it. When published, it will appear in the list of available workflows for this list, so the Name and Description can be quite important. Click “Save” when finished (button not shown).

Start Options

<input checked="" type="checkbox"/> Start manually
<input type="checkbox"/> Start when items are created
<input type="checkbox"/> Start when items are modified
Expected workflow duration Not Configured

[Save](#) [Cancel](#)

- We can also setup conditions that will cause the workflow to be initiated. Click the “Settings” button then choose “Startup Options”. The “Start manually” option can be enabled at the same time as “Start when items are created” and “Start when items are modified” to enable a document to be re-submitted to a workflow if it has previously completed it. Click “Save” when finished. You can also configure an “Expected duration” which will help determine the visual status of the warning icon in the “My Workflow Tasks” web part.



The workflow has been published.

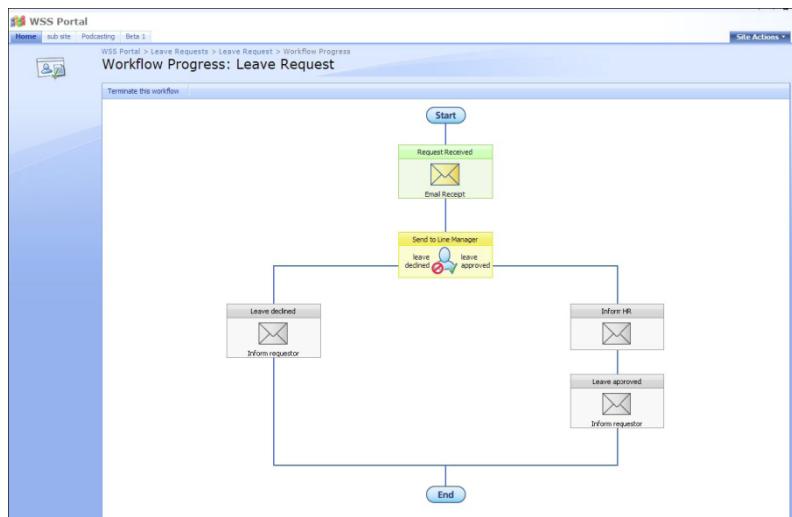
[OK](#)

- With our simple workflow now complete, we click the “Publish” button. We are now able to return to the Leave Request list.

Tutorial 1 – Part 8: Saving the workflow

New Leave Request

Title		Leave Request	OK	Cancel
* indicates a required field				
Leave Type		Annual Leave		
Comments		I need a holiday...please!		
Start Date *		12/18/2006	9 AM	00
The first working day you will be away				
Return Date *		1/8/2007	9 AM	00
The day you will be returning to work				
Total days *		12	The total number of work days that you will be absent. (do not include public holidays)	
Address		Palm Cove, Trinidad.		
Contact No		+1 222 333 444		
Address/location whilst on leave				
Contact number whilst on leave				
		OK	Cancel	



1. Now we can begin to use the workflow. First navigate to the SharePoint list where the form and workflow were created and fill in the form. The list should be found on the home page in the left navigation area: "Lists > Leave Requests".

Once you click "OK" you are returned to the Leave Requests list. Now activate the "Title" drop-down for the list item and click "View Workflow History" and then select the workflow from the list that appears to view a visual representation of where the item is in the workflow. Click the title of the workflow on the page that appears (not shown).

2. Due to our chosen settings, the list item enters the workflow straightaway. The green colouring around the first action indicates that it has been completed, the yellow colouring on the "Request Approval" action indicates that is as far as the workflow has progressed and that action of some sort is required to advance the workflow. The grey actions lower down are actions that are yet to come. For the workflow to advance, the configured approvers must approve or reject the document.