



Tutorial: Basic Branching Workflow

Tutorial: Basic Branching Workflow

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Tutorial: Basic Branching Workflow

Introduction

This tutorial will describe how to:

1. Create a workflow based on the 'How to: Create a Branching Workflow' MSDN article (<http://msdn.microsoft.com/en-us/library/ee767701.aspx>) using the Nintex Workflow for Project Server 2010 drag and drop design canvas as an alternative to developing (coding) the same workflow using Visual Studio 2010. Refer to Figure 1 for a summary of the workflow;

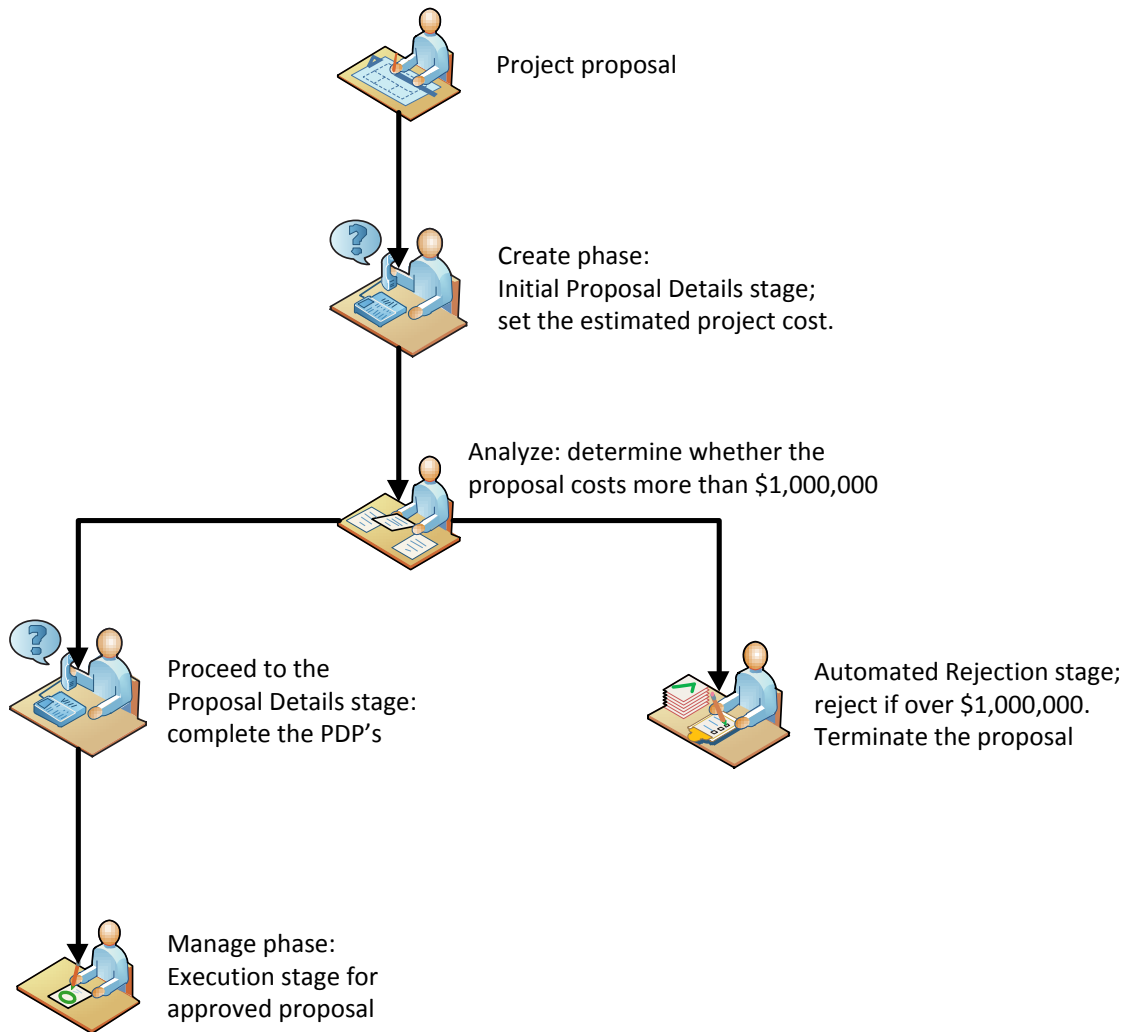


Figure 1: Basic Branching Workflow Flowchart

2. Associate a Nintex Workflow with an Enterprise Project Type (EPT).

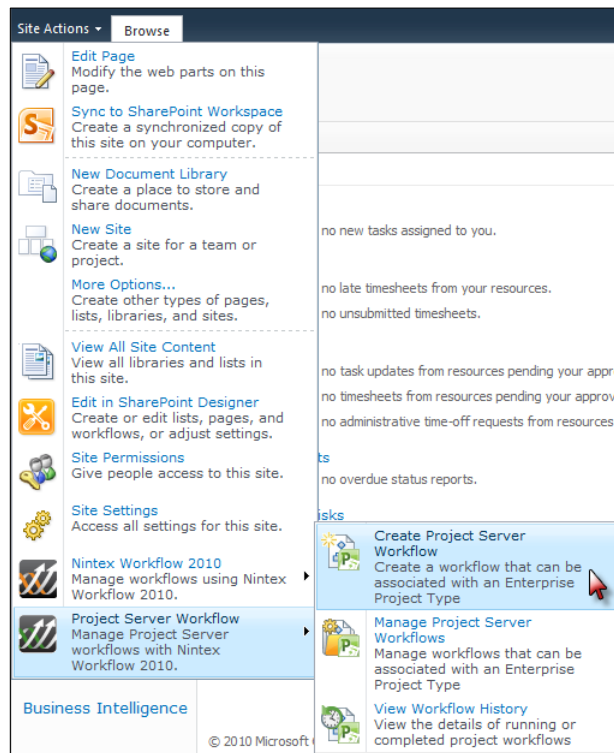
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Tutorials

Tutorial 1: Create a Branching Workflow

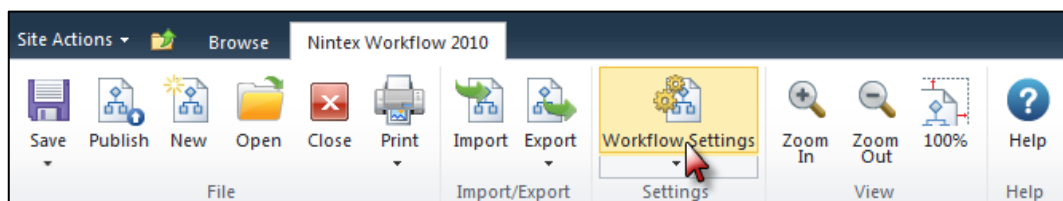
Open Nintex Workflow for Project Server 2010 workflow designer.

1. Navigate to the Project Web Application site.
2. Click Sites Actions > Project Server Workflow > Create Project Server Workflow.



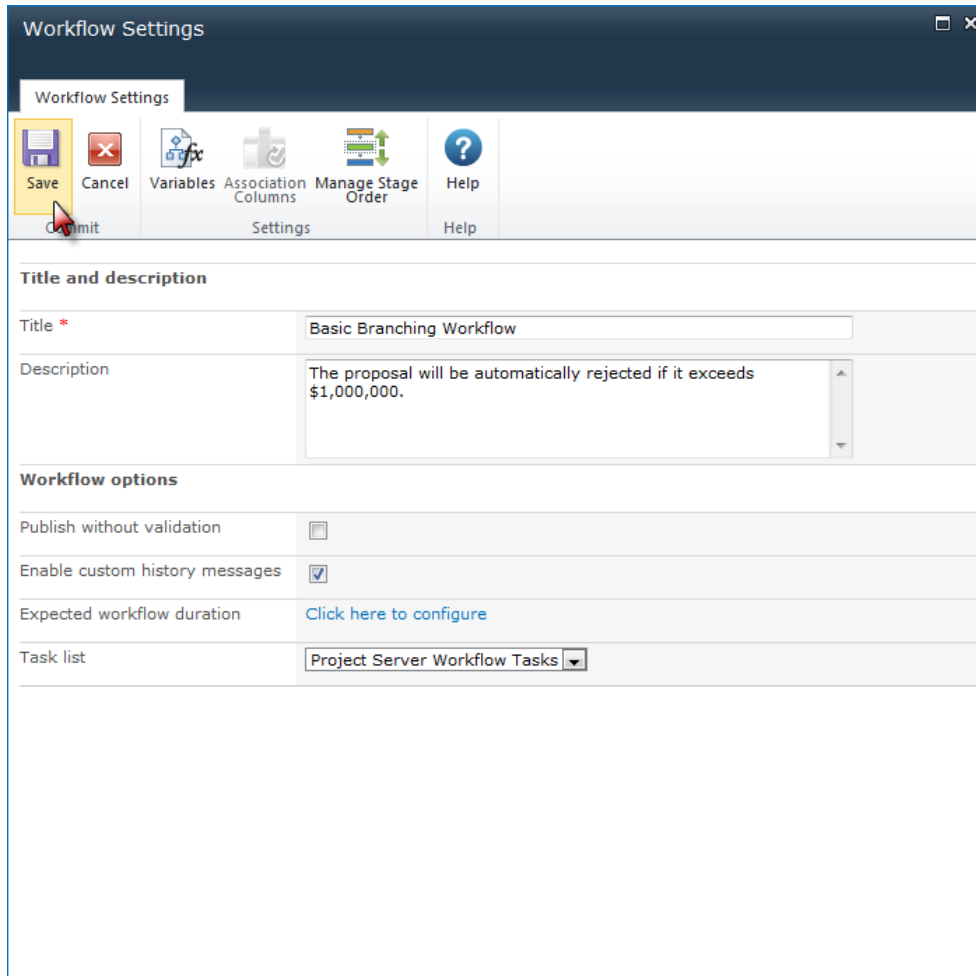
Configure the Workflow Settings and give the workflow a Title and Description.

3. In the Workflow Designer Ribbon, click on Workflow Settings.



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- In the Workflow Settings dialog, enter the Title and Description and click Save when completed.



Workflow Settings

Workflow Settings

Save Cancel Variables Association Columns Manage Stage Order Help

Commit Settings Help

Title and description

Title * Basic Branching Workflow

Description The proposal will be automatically rejected if it exceeds \$1,000,000.

Workflow options

Publish without validation

Enable custom history messages

Expected workflow duration [Click here to configure](#)

Task list Project Server Workflow Tasks

Note: The task list called Project Server Workflow Tasks is the default task list used for Project server workflows that is accessible from the Workflow Approvals link in the PWA home page.

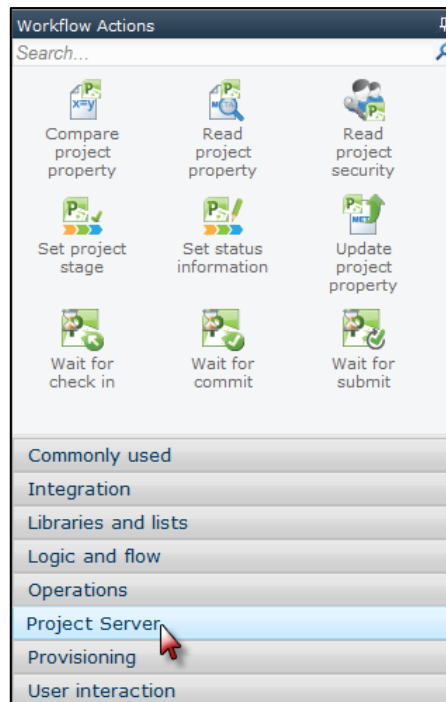
Start creating the workflow by dragging and dropping the workflow actions onto the design canvas.


The initial steps within this workflow will be to set the project stage and initial status of the project to wait for an input when the workflow is started.

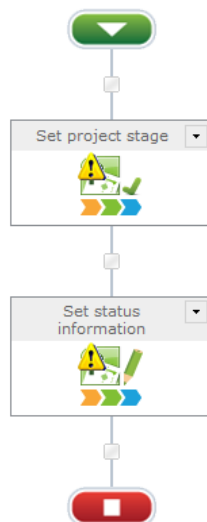
- In the Workflow Actions Toolbox, click the Project Server category for the workflow actions that are specific to Project Server.


Note: This tutorial is focused on the Project Server actions; the full set of Nintex Workflow 2010 actions are available to be used to integrate with SharePoint and other Line of Business systems.

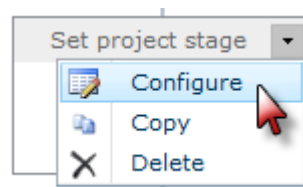
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- Click and drag the Set project stage and Set status information actions from the toolbox and drop them onto separate drop-zones  on the design canvas.

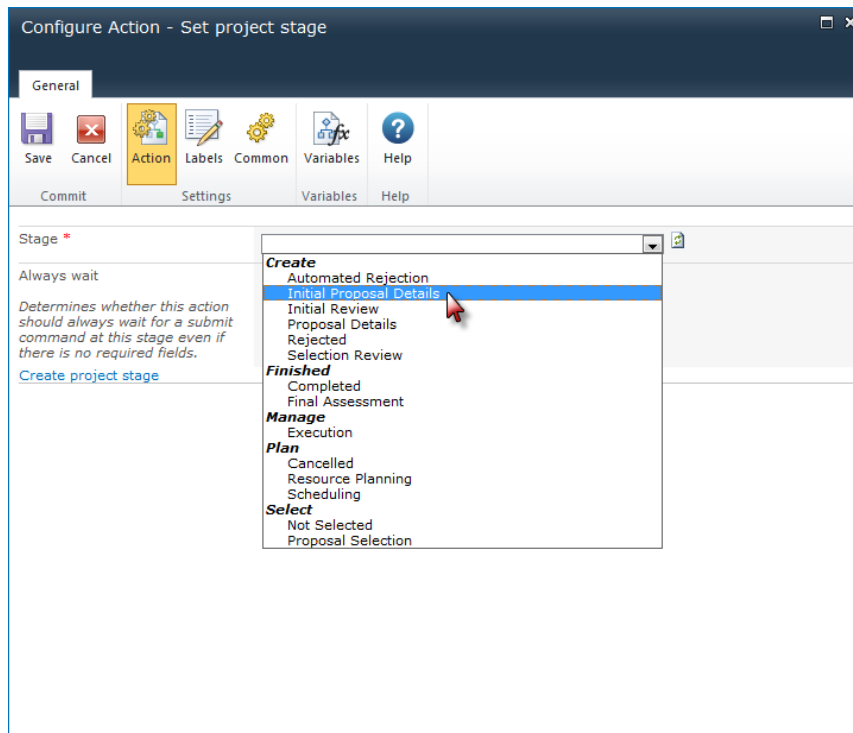


- On the Set project stage action, click the arrow  in the title bar and select Configure from the drop down menu options. The Configure action settings dialog will appear (alternatively double click on the action).



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8. In the Stage drop-down, select Initial Proposal Details.



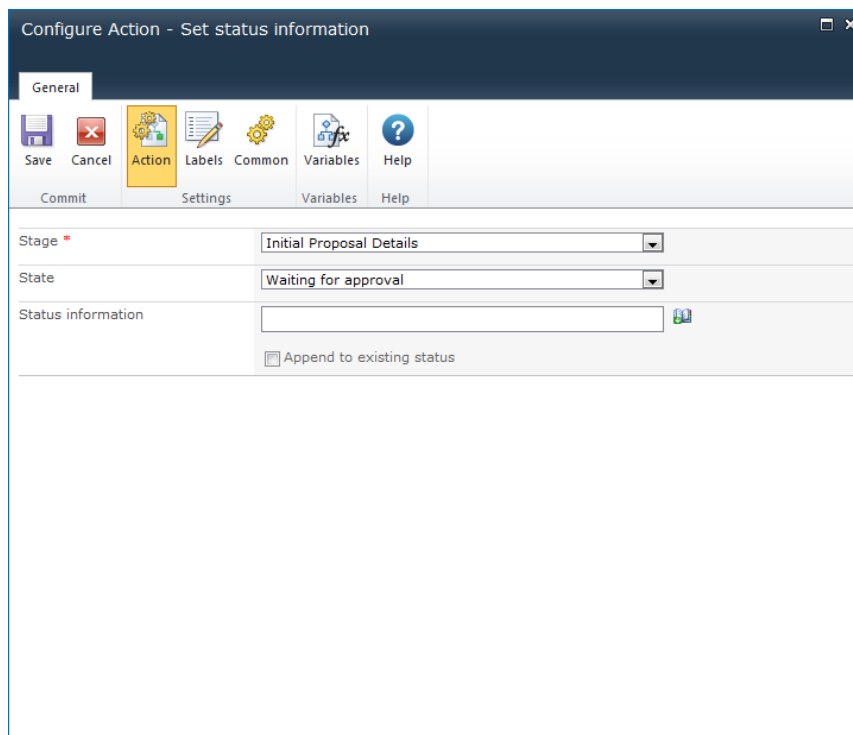
9. Click Save.

10. On the Set status information action, select Configure from the drop down menu options. The Configure action settings dialog will appear.

11. In the Stage drop-down, select Initial Proposal Details.

12. In the State drop-down, select Waiting for input.

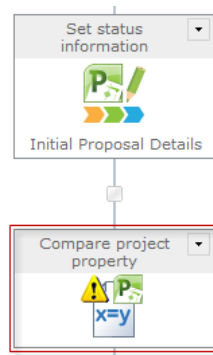
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13. Click Save.

An evaluation of the Sample Proposal Cost value will determine if the cost is within the \$1,000,000 approval limit.

14. Add the Compare project property action from the toolbox to the design canvas below the Set Status information action.

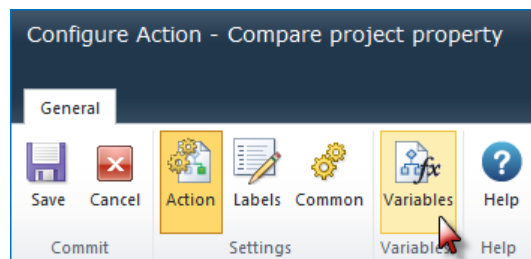


15. Configure the Compare project property action (double click on the action to open the dialog box).

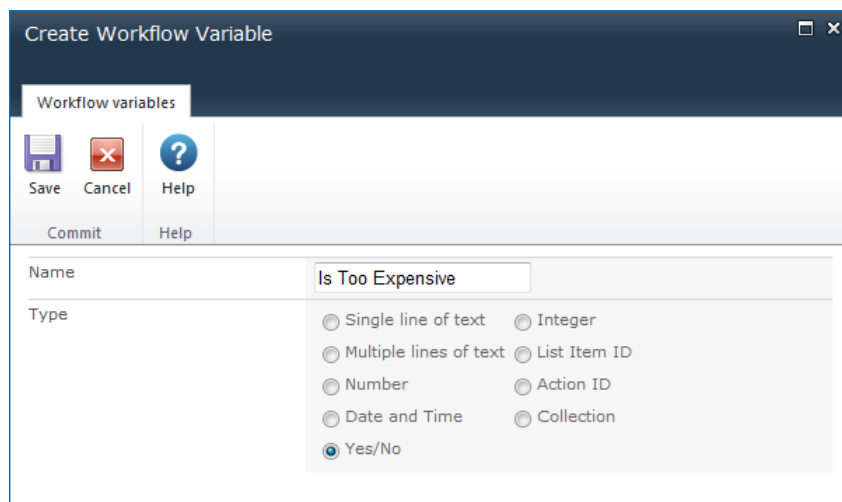
The Compare project property action will return a True/False based on the comparison. Create a workflow variable to store the result of the comparison.

- a. In the Configure action settings dialog, in the Ribbon, click on Variables.

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- b. In the Workflow Variables settings dialog, click New.
- c. In the Create Workflow Variable settings dialog, create a Yes/No variable type called 'Is Too Expensive'.

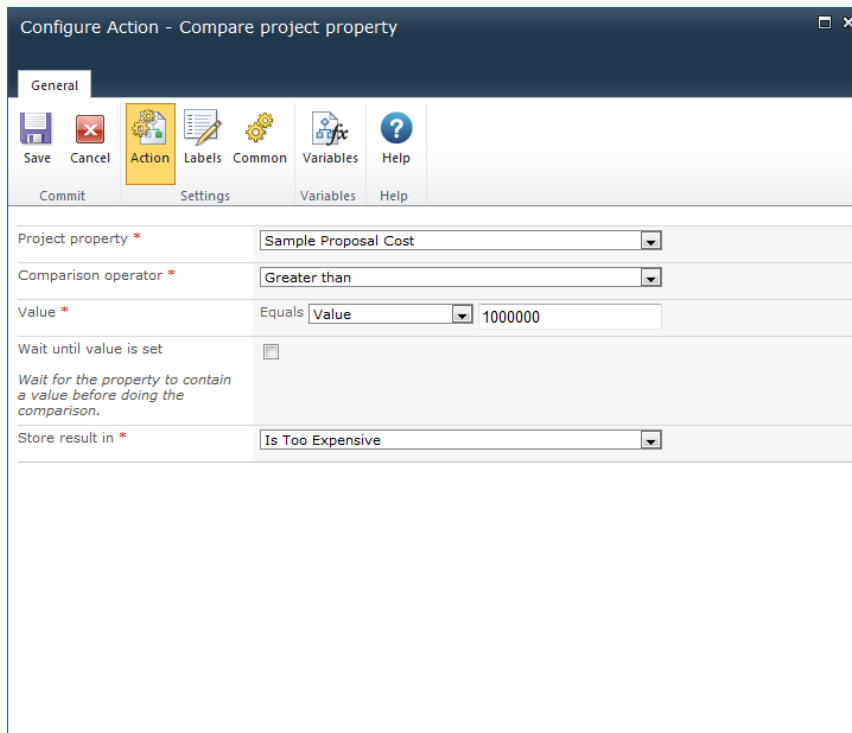


- d. Click Save and then click Close.

The variable has now been created.

16. In the Configure action settings, for the Project property field, select the Sample Proposal Cost (notice that this drop down list has been populated with the Project Server properties).
17. Configure the other options in the workflow action as follows:
 - a. Comparison Operator: Greater than
 - b. Value: Value; 1000000
 - c. Store result in: Is Too Expensive

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Configure Action - Compare project property

General

Save Cancel Action Labels Common Variables Help

Commit Settings Variables Help

Project property * Sample Proposal Cost

Comparison operator * Greater than

Value * Equals Value 1000000

Wait until value is set

Wait for the property to contain a value before doing the comparison.

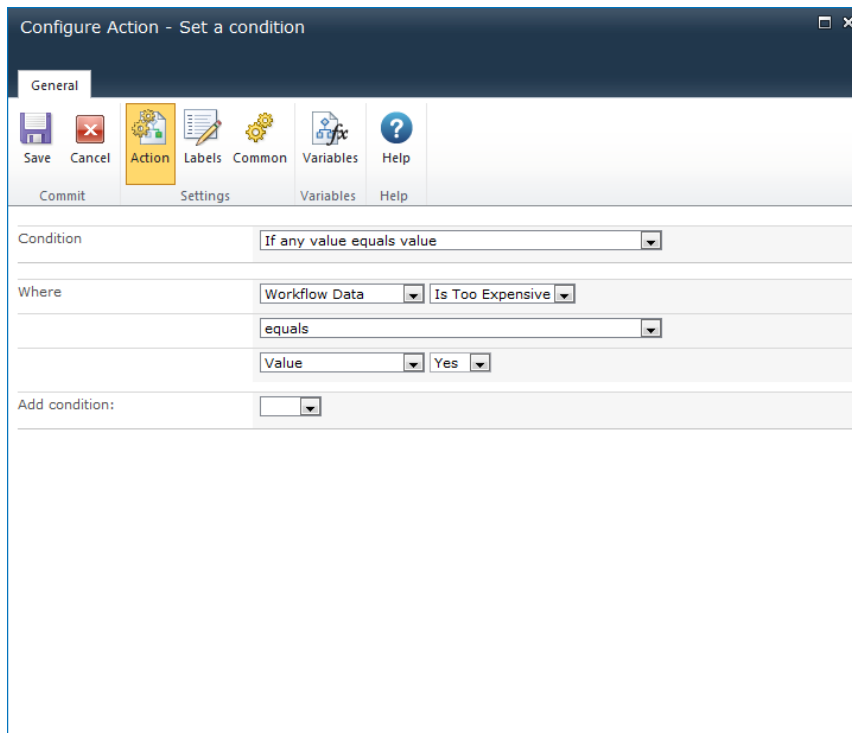
Store result in * Is Too Expensive

d. Click Save.

Configure the outcome of the project based on the result of the comparison. In this example, the project will move to the next stage if it is equal or less than \$1,000,000; else an automatic rejection will occur.

18. Add the Set a condition action to the design canvas (below the Compare project property action).
19. Configure the Set a condition action (double click on the action to open the dialog box).
20. In the Configure action settings, configure the options as follows:
 - a. Condition: If any value equals value
 - b. Where: Workflow Data; Is Too Expensive; equals; Value; Yes

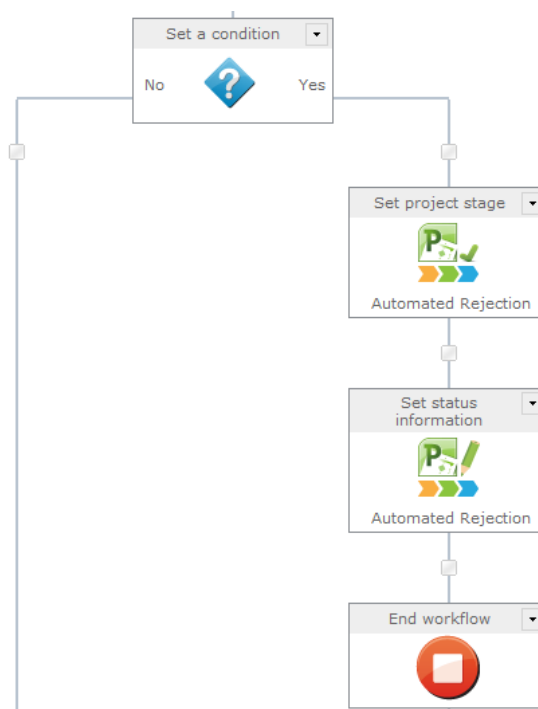
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c. Click Save.

Configure the outcome if the project cost is greater than \$1,000,000 in the 'Yes' branch.

21. Add the Set project stage, Set status information and End Workflow actions to the Yes branch of the Set a condition action on the design canvas.

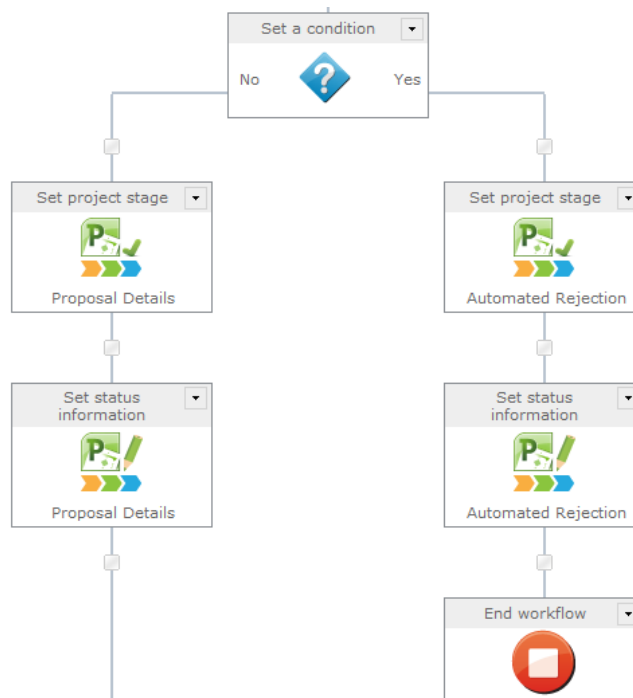


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22. In the Set project stage, configure the options as follows:
 - a. Stage: Automatic Rejection
 - b. Click Save.
23. In the Set status information, configure the options as follows:
 - a. Stage: Automatic Rejection
 - b. State: Leave current state
 - c. Click Save.

Configure the outcome if the project cost is less than or equals to \$1,000,000 in the 'No' branch.

24. Add the Set project stage and Set status information to the No branch of the Set a condition action on the design canvas.

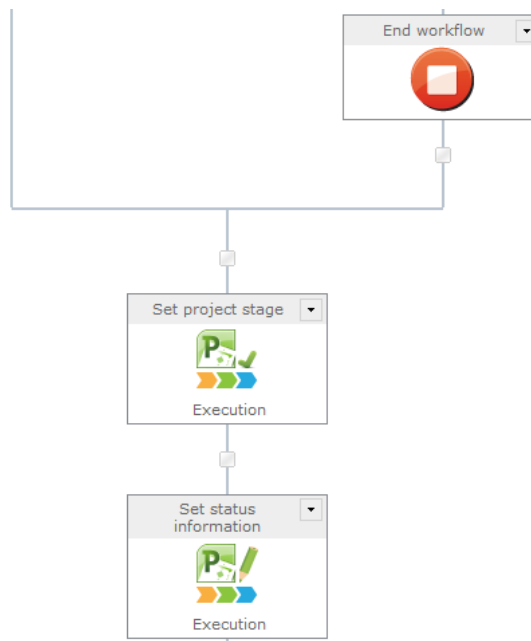


25. In the Set project stage, configure the options as follows:
 - a. Stage: Proposal Details.
 - b. Click Save.
26. In the Set status information, configure the options as follows:
 - a. Stage: Proposal Details
 - b. State: Waiting for Input
 - c. Click Save.

Configure the last stage of the project for the workflow to progress.

27. Add the Set project stage and Set status information below the Set a condition action on the design canvas.

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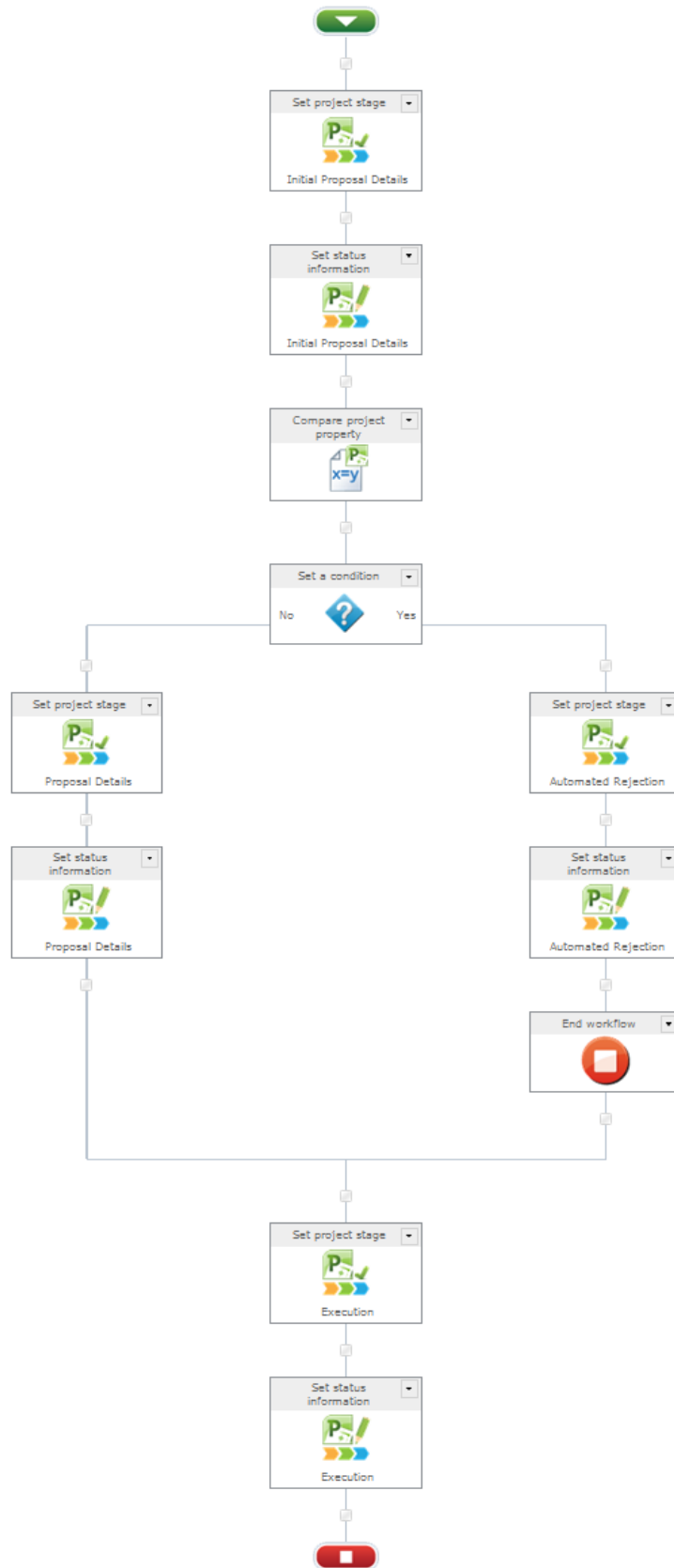


28. In the Set project stage, configure the options as follows:
 - a. Stage: Execution
 - b. Click Save.

29. In the Set status information, configure the options as follows:
 - a. Stage: Execution
 - b. State: Waiting for Input
 - c. Click Save.

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The workflow should now be configured as shown:



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Publish the workflow.

30. In the Ribbon, click on Publish.



31. In the Set Title & Description dialog, click Submit.

32. Exit the Workflow Designer Ribbon, click on Close.

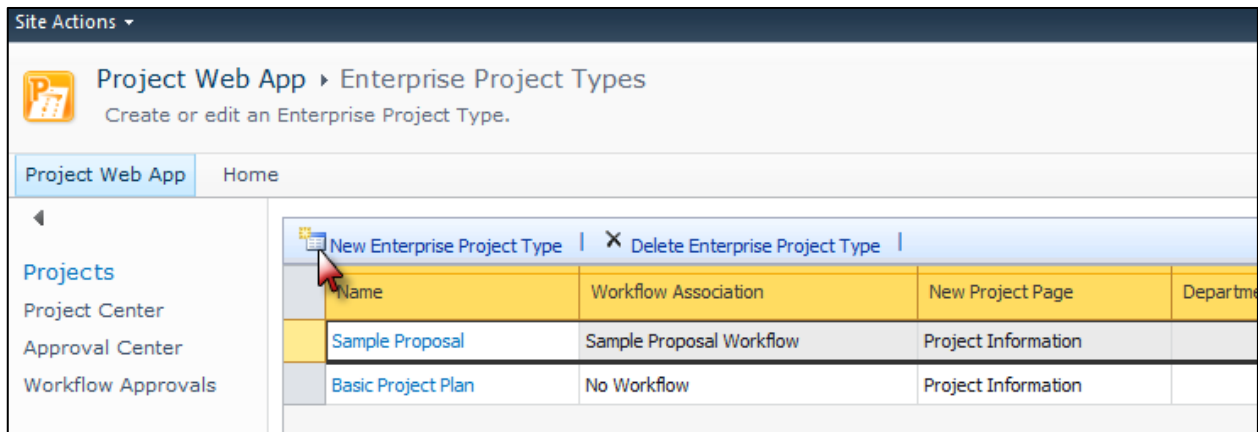
The Basic Branching Workflow is now complete. The workflow will run when a new project is created based on an Enterprise Project Type that has been associated to this workflow.

“Tutorial 2: Associate a Nintex Workflow with an Enterprise Project Type” will describe how to associate the workflow (created above) to an Enterprise Project Type.

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Tutorial 2: Associate a Nintex Workflow with an Enterprise Project Type

1. Navigate to the Project Web Application (PWA) site, in the Quick Launch navigation, click on Server Settings.
2. In the Workflow and Project Detail Pages section, click on Enterprise Project Types.
3. Create an Enterprise Project Type, by clicking on New Enterprise Project Type.



4. In the Add Enterprise Project Type page, specify a Name for the Enterprise Project Type (for this example, Cost Restricted Proposal).
5. In the Site Workflow Association drop-down, select the Nintex Workflow (in this example, it will be the Basic Branching Workflow created in Tutorial 1 above) to be associated with this Enterprise Project Type.

| | |
|--|---|
| <p>Name</p> <p>Specify a name for the Enterprise Project Type. This is the name users will see while you are creating new projects in Project Center.</p> | <p>* Name:</p> <p>Cost Restricted Proposal</p> |
| <p>Description</p> <p>Specify a description for the Enterprise Project Type. This information will display in the tool tip when users rest the pointer on the name while creating new projects in Project Center.</p> | <p>Description: (max 512 characters)</p> |
| <p>Site Workflow Association</p> <p>Choose a site workflow association for this Project Workflow. For the 'Site Workflow' to appear in the drop down, it has to be installed and configured on the Project Server machine. <i>Note: Once you select an association it cannot be changed</i></p> | <p>Site Workflow Association:</p> <p>Basic Branching Workflow Basic Branching Workflow Sample Proposal Workflow No Workflow</p> |
| <p>New Project Page/Project Detail Pages</p> <p>Choose the 'New Project Page' for this enterprise project type. This is the first Project Detail Page that users will see when you create new projects in the Project Center. If the 'No Workflow' option is selected as the Site Workflow Association, then choose the Project Detail Pages that users will see once the project is created.</p> | <p>New Project Page:</p> <p>Project Details</p> |

6. Fill in any other details in the remaining fields as required, once completed, click the Save button.

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The newly created Enterprise Project Type will be listed together with the Workflow Association.

Now create a project based on the Enterprise Project Type “Cost Restricted Proposal” and the Basic Branching Workflow will begin executing automatically.

