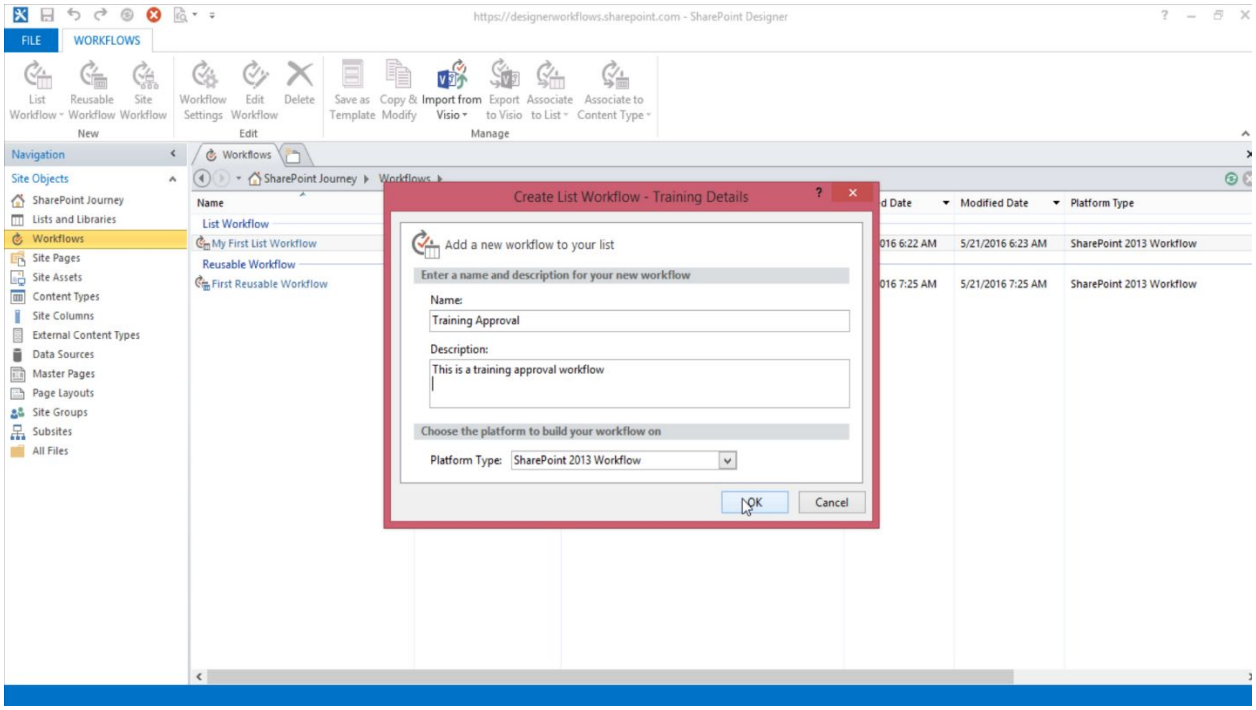
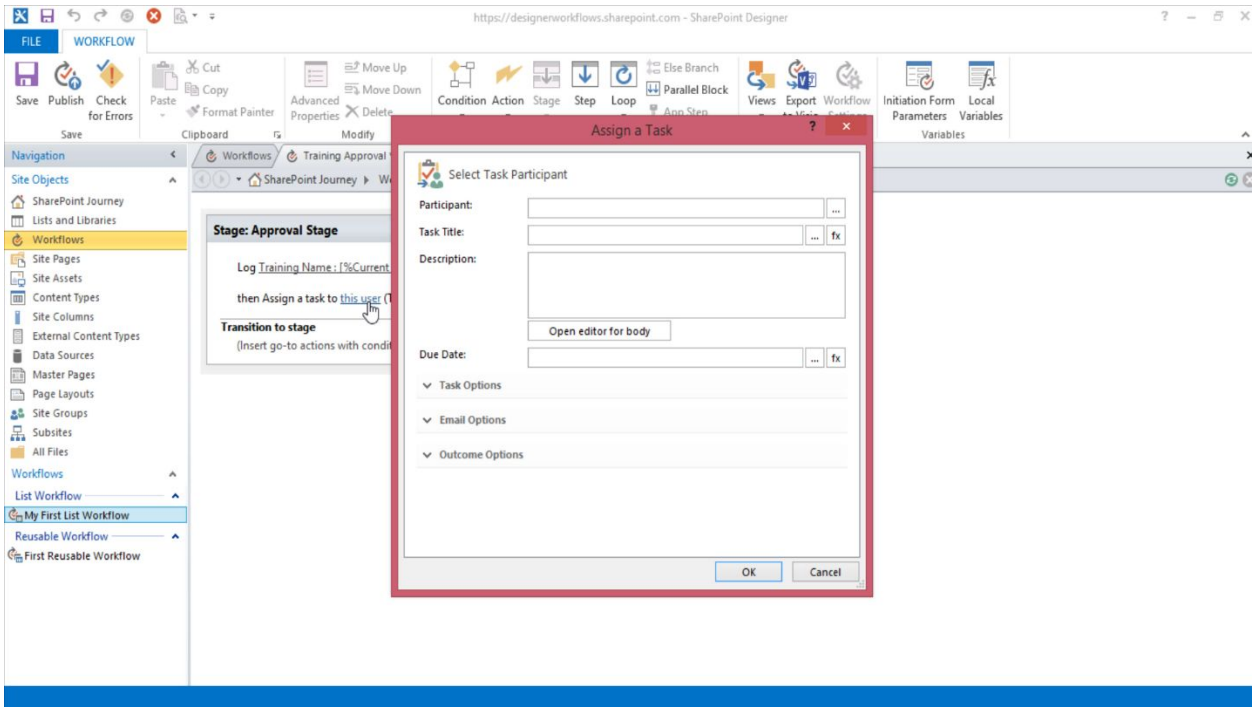
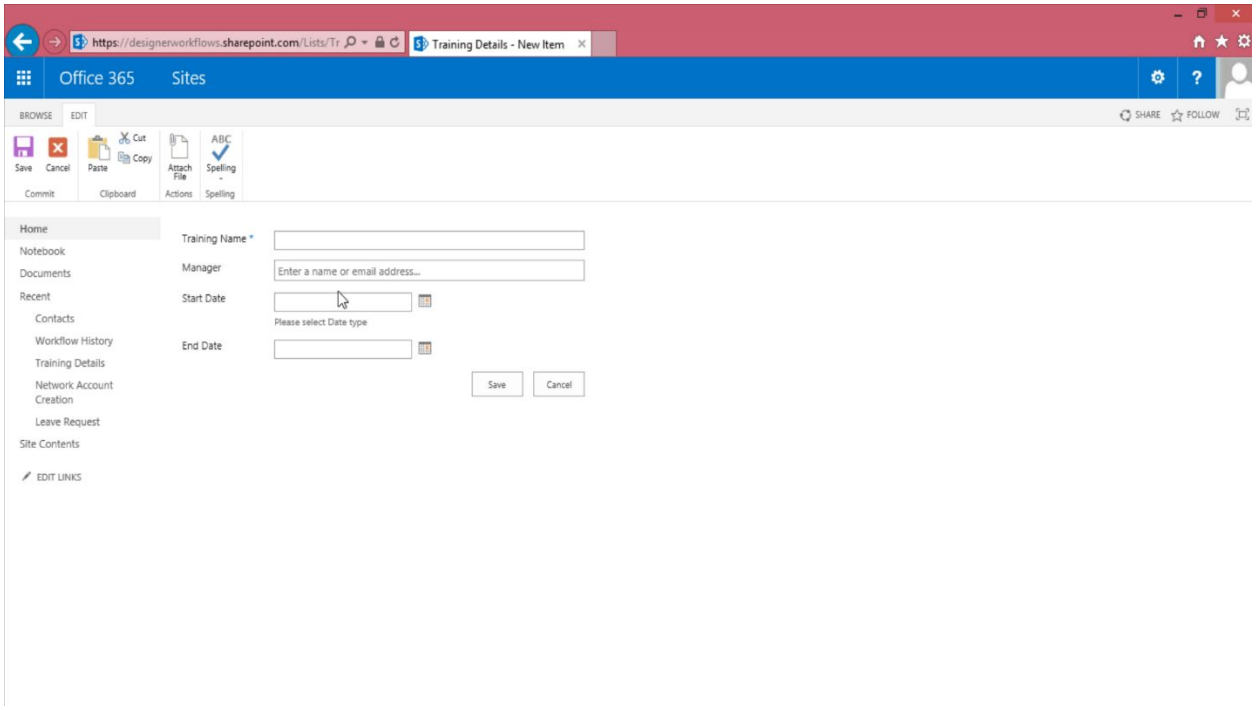
Demo

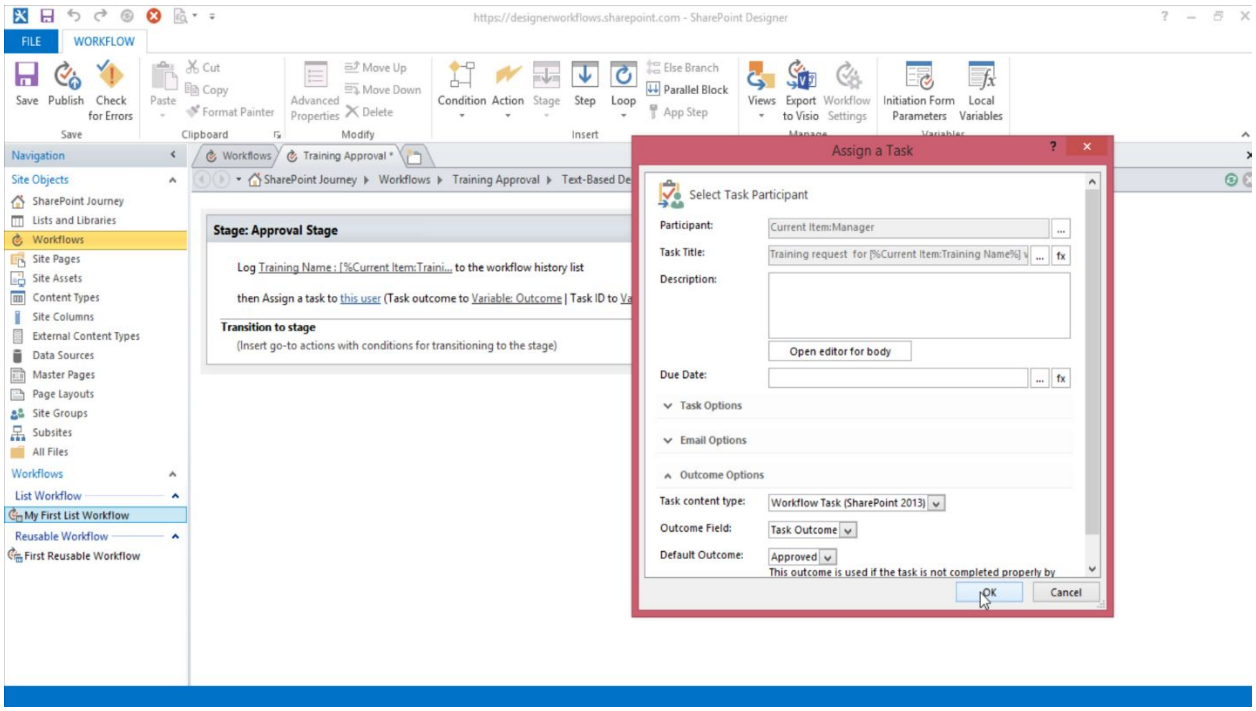
Let's some cut the demo of State[sp] Machine Workflow where employee submits a request and manager rejects it and employee can resubmit the request. Within the site, I have logged in as Steven Smith who is an employee. And he can go to the leave request list to submit a new leave request. Click on new item here and fill all the information within the leave[sp] request. One of the important fields here is the Manager Field. He selected Chris as a Manager and submits a request. Workflow started and when we click on initiation, we can see some logging happened. Now I can log in as a Chris where he will receive an email for that particular vacation request. Either he can approve it or reject it. In this case, I am going to reject it. So that it will go back to the employee who is Steven Smith. Once it is rejected, the task is completed. Let's go back to these sites where we have logged in as Steven Smith. Now If I refresh the email, he is going to get a new email along with the task. Let's look at the workforce status page also. The task was rejected by Chris which was first task that has been raised. Now assigned to employee's stage. You can see that there's a task created for Steven Smith now. He should be receiving email soon. Now that he needs to complete so let's refresh that. And look at the latest email which she got. So one email she will get that the request has been rejected. The other email is, she is going to get the task for that particular update that need to be done. You can merge it later. Now here, If I look at the edit task also, it will show approved and rejected. This can be improved to complete now. He can go to main item and complete the details.[[00:02:00]] As of now, I just redirect him to the task. So ideally we want an option like completed. So now once he approves it, I can refresh the workflow status to see where this workflow is at. Now you can look at that. It's assigned to the Manger. I'll soon create one more task for the Manager. See it's submitted for the approval. Now Manager can go back and look at his email. Once he receives a new email, then he can go ahead. And either if he is happy than he can approve that particular task. So in this case, I hope that Chris is happy with the information provided by Steven Smith. Now he just approves it finally, if you look at the workflow status. Approved and they are logging some kind of information like what's the task outcome now. By default, once it is approved it will go to the HR stage. Now Steven Smith also gets an email saying that your request has been approved. You can check those details of that particular item from that particular link that has been shared. So this is a fairly straight forward example of State Machine Workflow that we have used different roles called Employee, Manager and HR. So we haven't done anything at the HR level but you can improve. You can create a task for the HR to complete those formalities. And also you might have seen in the task forms, we have approved and rejected even in the case of Employee. But ideally we want something like completed. Those kinds of custom task outcomes. So we'll see how to customize those task forms

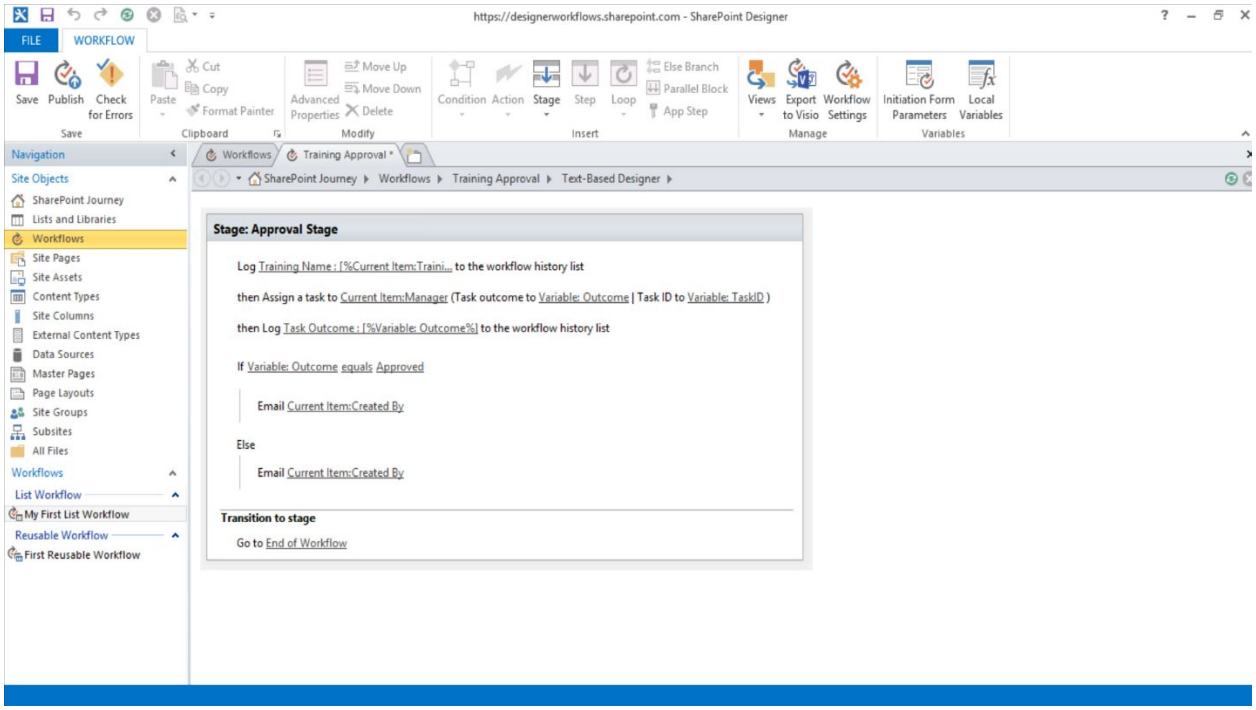
and also the task outcomes. What are these things? And how we could do? So we would be looking at, in the future modules on how to customize those forms?

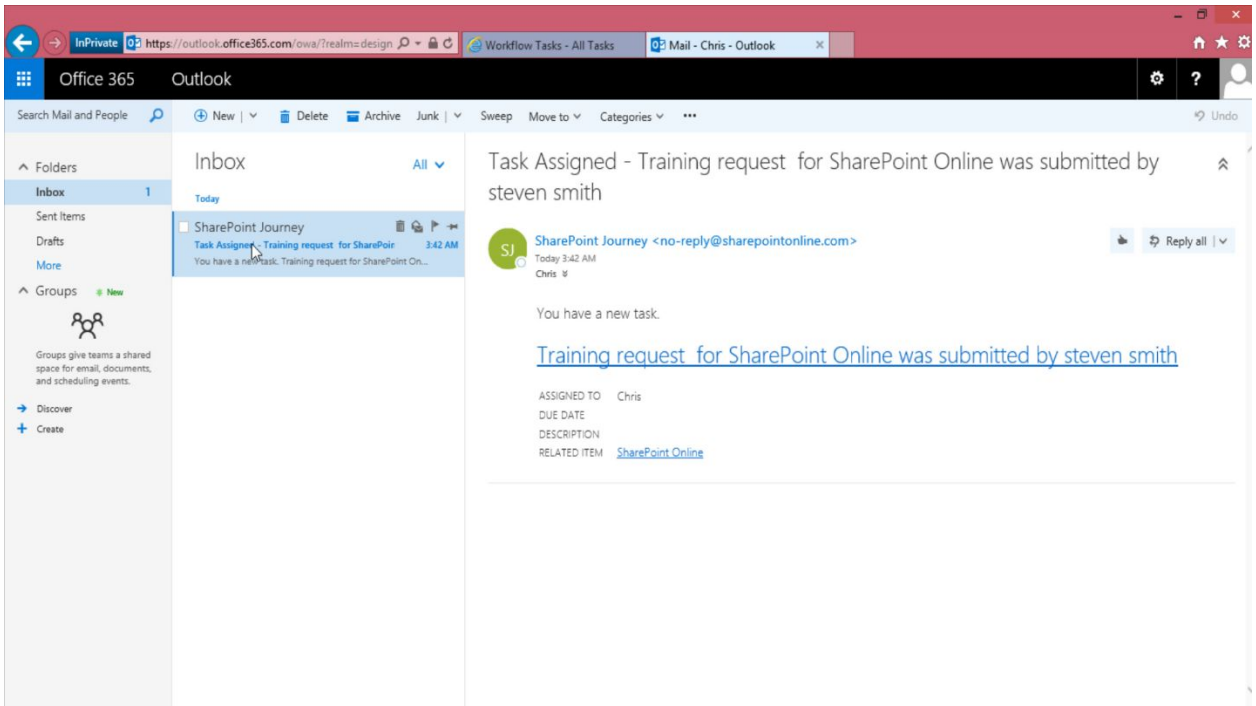


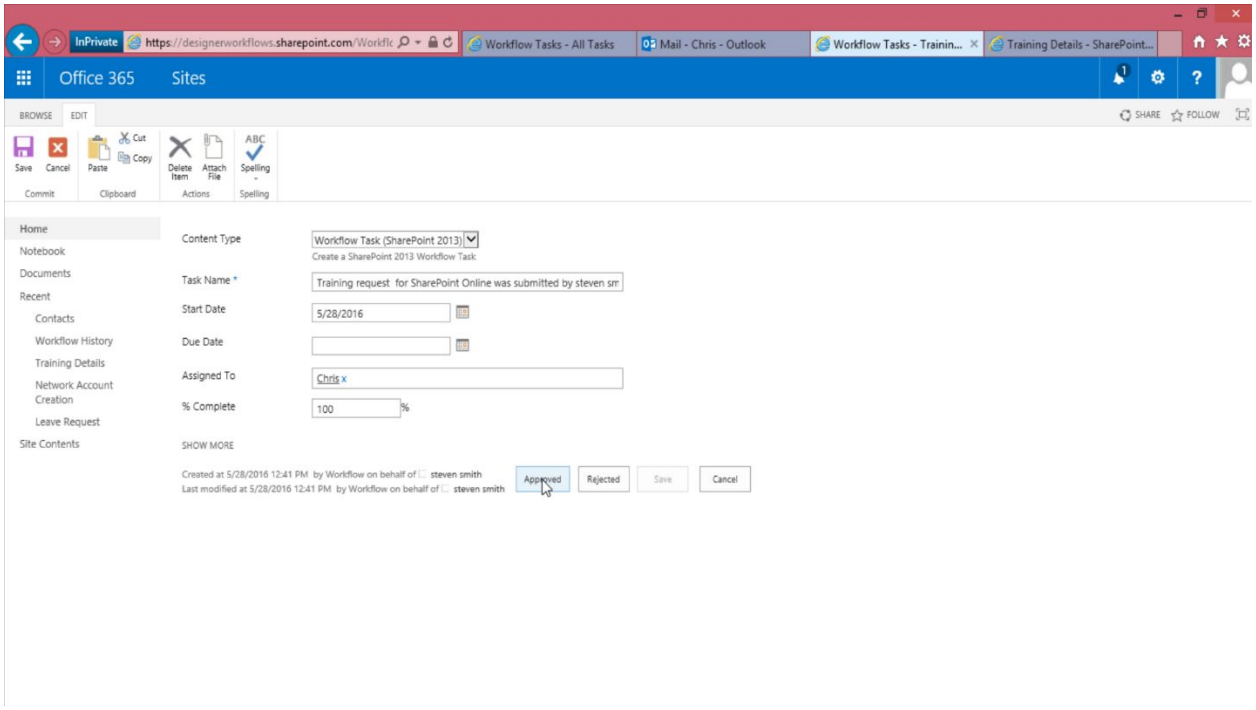


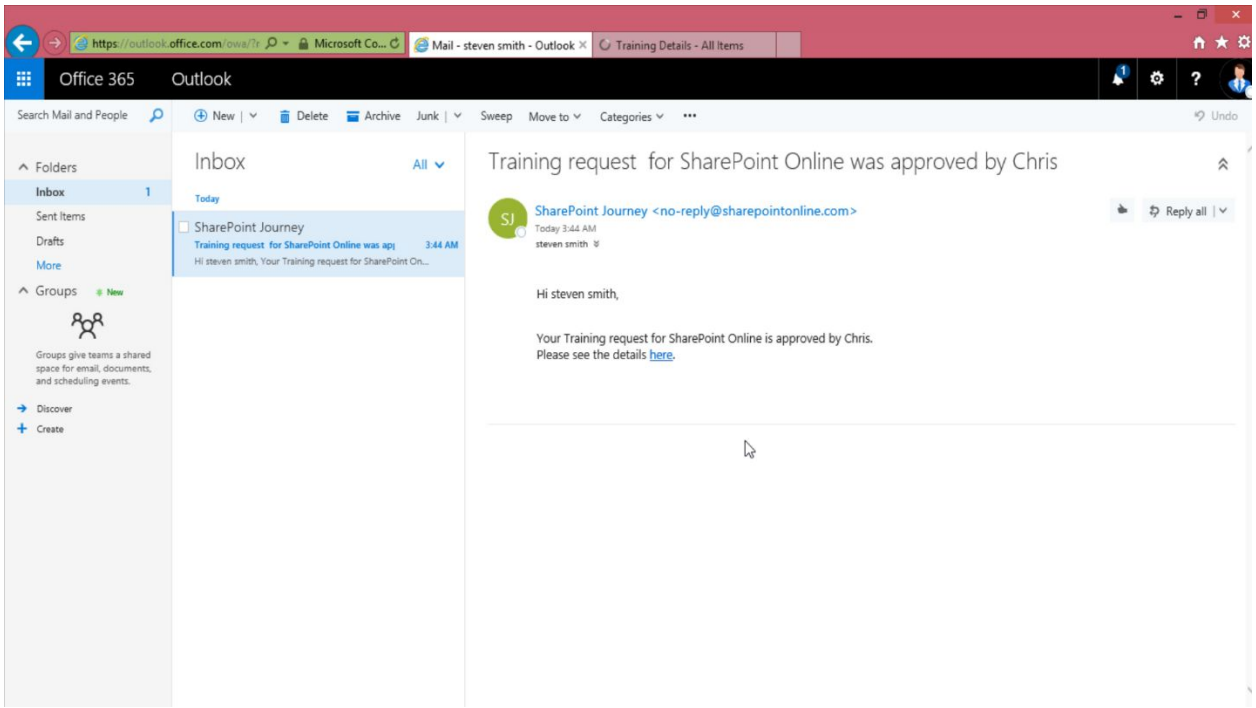

https://designerworkflows.sharepoint.com/Lists/Tr
Training Details - New Item
Office 365
Sites
BROWSE
EDIT
SHARE
FOLLOW
Save
Cancel
Paste
Cut
Copy
Attach File
Spelling
Commit
Clipboard
Actions
Spelling
Home
Notebook
Documents
Recent
Contacts
Workflow History
Training Details
Network Account Creation
Leave Request
Site Contents
EDIT LINKS
Training Name *
Manager
Enter a name or email address...
Start Date
Please select Date type
End Date
Save
Cancel

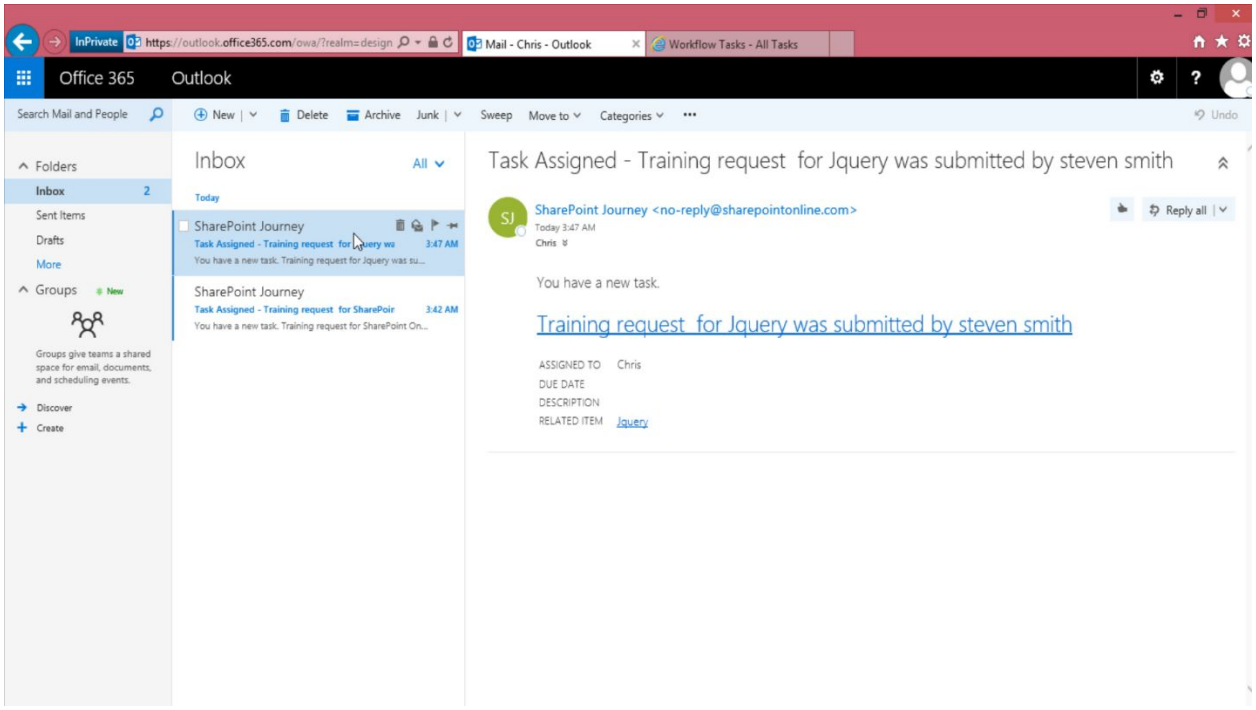

https://designerworkflows.sharepoint.com - SharePoint Designer
FILE
WORKFLOW
Save
Publish
Check for Errors
Paste
Cut
Copy
Format Painter
Advanced Properties
Move Up
Move Down
Delete
Condition
Action
Stage
Step
Loop
Else Branch
Parallel Block
App Step
Views
Export to Visio
Workflow Settings
Initiation Form Parameters
Local Variables
Navigation
Site Objects
SharePoint Journey
Lists and Libraries
Workflows
Site Pages
Site Assets
Content Types
Site Columns
External Content Types
Data Sources
Master Pages
Page Layouts
Site Groups
Subsites
All Files
Workflows
List Workflow
My First List Workflow
Reusable Workflow
First Reusable Workflow
Workflows
Training Approval *
SharePoint Journey
Workflows
Training Approval
Stage: Approval Stage
Log Training Name : [%Current Item:Traini... to the workflow history list
then Assign a task to this user (Task outcome to Variable: Outcome | Task ID to
Transition to stage
(Insert go-to actions with conditions for transitioning to the stage)
Assign a Task
Select Task Participant
Participant:
Current Item:Manager
Task Title:
Training request for [%Current Item:Training Name%]
Description:
Open editor for body
Due Date:
Task Options
Email Options
Outcome Options
Task content type:
Workflow Task (SharePoint 2013)
Outcome Field:
Task Outcome
Default Outcome:
Approved
This outcome is used if the task is not completed properly by
OK
Cancel

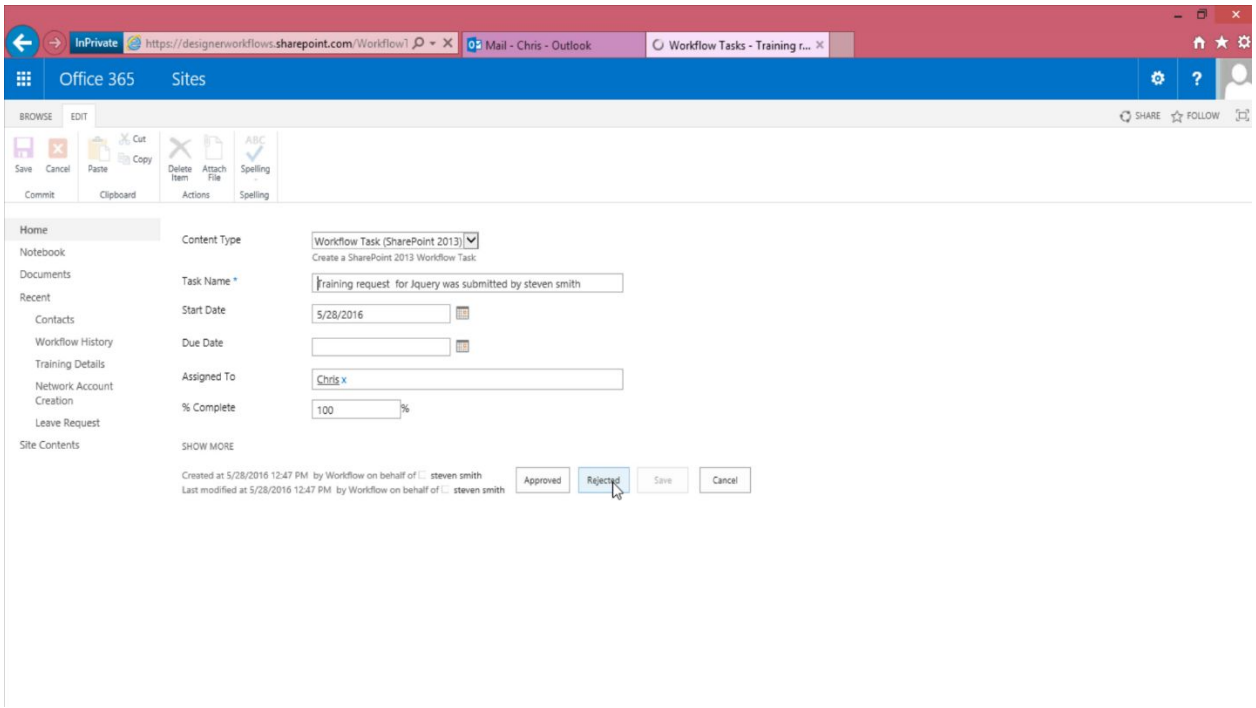

https://designerworkflows.sharepoint.com - SharePoint Designer
FILE
WORKFLOW
Save
Publish
Check for Errors
Cut
Copy
Format Painter
Paste
Move Up
Move Down
Delete
Advanced Properties
Condition
Action
Stage
Step
Loop
Else Branch
Parallel Block
App Step
Views
Export to Visio
Workflow Settings
Initiation Form Parameters
Local Variables
Navigation
Site Objects
SharePoint Journey
Lists and Libraries
Workflows
Site Pages
Site Assets
Content Types
Site Columns
External Content Types
Data Sources
Master Pages
Page Layouts
Site Groups
Subsites
All Files
Workflows
List Workflow
My First List Workflow
Reusable Workflow
First Reusable Workflow
Workflows
Training Approval *
SharePoint Journey ▸ Workflows ▸ Training Approval ▸ Text-Based Designer ▸
Stage: Approval Stage
Log Training Name : [%Current Item:Traini... to the workflow history list
then Assign a task to Current Item:Manager (Task outcome to Variable: Outcome | Task ID to Variable: TaskID)
then Log Task Outcome : [%Variable: Outcome%] to the workflow history list
If Variable: Outcome equals Approved
Email Current Item:Created By
Else
Email Current Item:Created By
Transition to stage
Go to End of Workflow

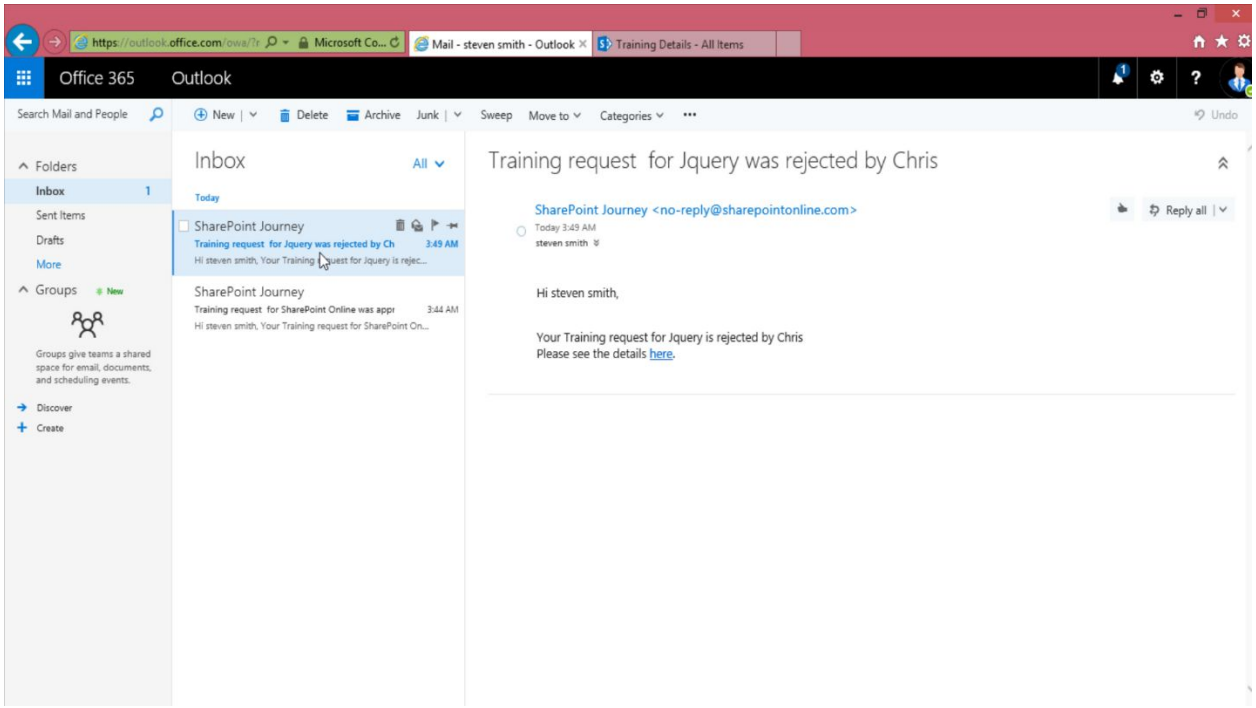

InPrivate
https://outlook.office365.com/owa/?realm=design
Workflow Tasks - All Tasks
Mail - Chris - Outlook
Office 365
Outlook
Search Mail and People
New
Delete
Archive
Junk
Sweep
Move to
Categories
Undo
Folders
Inbox 1
Sent Items
Drafts
More
Groups New
Groups give teams a shared space for email, documents, and scheduling events.
Discover
Create
Inbox
All
Today
SharePoint Journey
Task Assigned - Training request for SharePoir
3:42 AM
You have a new task. Training request for SharePoint On...
Task Assigned - Training request for SharePoint Online was submitted by steven smith
SJ
SharePoint Journey <no-reply@sharepointonline.com>
Today 3:42 AM
Chris
Reply all
You have a new task.
Training request for SharePoint Online was submitted by steven smith
ASSIGNED TO Chris
DUE DATE
DESCRIPTION
RELATED ITEM SharePoint Online


InPrivate
https://designerworkflows.sharepoint.com/Workfl
Workflow Tasks - All Tasks
Mail - Chris - Outlook
Workflow Tasks - Trainin...
Training Details - SharePoint...
Office 365
Sites
BROWSE
EDIT
SHARE
FOLLOW
Save
Cancel
Paste
Cut
Copy
Delete Item
Attach File
Spelling
Commit
Clipboard
Actions
Spelling
Home
Notebook
Documents
Recent
Contacts
Workflow History
Training Details
Network Account Creation
Leave Request
Site Contents
Content Type
Workflow Task (SharePoint 2013)
Create a SharePoint 2013 Workflow Task
Task Name *
Training request for SharePoint Online was submitted by steven sm
Start Date
5/28/2016
Due Date
Assigned To
Chris x
% Complete
100
%
SHOW MORE
Created at 5/28/2016 12:41 PM by Workflow on behalf of steven smith
Last modified at 5/28/2016 12:41 PM by Workflow on behalf of steven smith
Approved
Rejected
Save
Cancel


https://outlook.office.com/owa/?r
Microsoft Co...
Mail - steven smith - Outlook
Training Details - All Items
Office 365
Outlook
Search Mail and People
New
Delete
Archive
Junk
Sweep
Move to
Categories
Undo
Folders
Inbox 1
Sent Items
Drafts
More
Groups New
Groups give teams a shared space for email, documents, and scheduling events.
Discover
Create
Inbox
All
Today
SharePoint Journey
Training request for SharePoint Online was ap
3:44 AM
Hi steven smith, Your Training request for SharePoint On...
Training request for SharePoint Online was approved by Chris
SJ
SharePoint Journey <no-reply@sharepointonline.com>
Today 3:44 AM
steven smith
Reply all
Hi steven smith,
Your Training request for SharePoint Online is approved by Chris.
Please see the details here.


InPrivate
https://outlook.office365.com/owa/?realm=design
Mail - Chris - Outlook
Workflow Tasks - All Tasks
Office 365
Outlook
Search Mail and People
New
Delete
Archive
Junk
Sweep
Move to
Categories
Undo
Folders
Inbox 2
Sent Items
Drafts
More
Groups
New
Groups give teams a shared space for email, documents, and scheduling events.
Discover
Create
Inbox
All
Today
SharePoint Journey
Task Assigned - Training request for Jquery wa
3:47 AM
You have a new task. Training request for Jquery was su...
SharePoint Journey
Task Assigned - Training request for SharePoir
3:42 AM
You have a new task. Training request for SharePoint On...
Task Assigned - Training request for Jquery was submitted by steven smith
SharePoint Journey <no-reply@sharepointonline.com>
Today 3:47 AM
Chris
Reply all
You have a new task.
Training request for Jquery was submitted by steven smith
ASSIGNED TO Chris
DUE DATE
DESCRIPTION
RELATED ITEM Jquery


InPrivate
https://designerworkflows.sharepoint.com/Workflow1
Mail - Chris - Outlook
Workflow Tasks - Training r...
Office 365
Sites
BROWSE
EDIT
SHARE
FOLLOW
Save
Cancel
Paste
Cut
Copy
Delete Item
Attach File
Spelling
Commit
Clipboard
Actions
Spelling
Home
Notebook
Documents
Recent
Contacts
Workflow History
Training Details
Network Account Creation
Leave Request
Site Contents
Content Type
Workflow Task (SharePoint 2013)
Create a SharePoint 2013 Workflow Task
Task Name *
Training request for Jquery was submitted by steven smith
Start Date
5/28/2016
Due Date
Assigned To
Chris
% Complete
100
%
SHOW MORE
Created at 5/28/2016 12:47 PM by Workflow on behalf of steven smith
Last modified at 5/28/2016 12:47 PM by Workflow on behalf of steven smith
Approved
Rejected
Save
Cancel


https://outlook.office.com/owa/?r
Microsoft Co...
Mail - steven smith - Outlook
Training Details - All Items
Office 365
Outlook
Search Mail and People
New
Delete
Archive
Junk
Sweep
Move to
Categories
Undo
Folders
Inbox 1
Sent Items
Drafts
More
Groups New
Groups give teams a shared space for email, documents, and scheduling events.
Discover
Create
Inbox
All
Today
SharePoint Journey
Training request for Jquery was rejected by Ch 3:49 AM
Hi steven smith, Your Training request for Jquery is rejec...
SharePoint Journey
Training request for SharePoint Online was appr 3:44 AM
Hi steven smith, Your Training request for SharePoint On...
Training request for Jquery was rejected by Chris
SharePoint Journey <no-reply@sharepointonline.com>
Today 3:49 AM
steven smith
Reply all
Hi steven smith,
Your Training request for Jquery is rejected by Chris
Please see the details here.