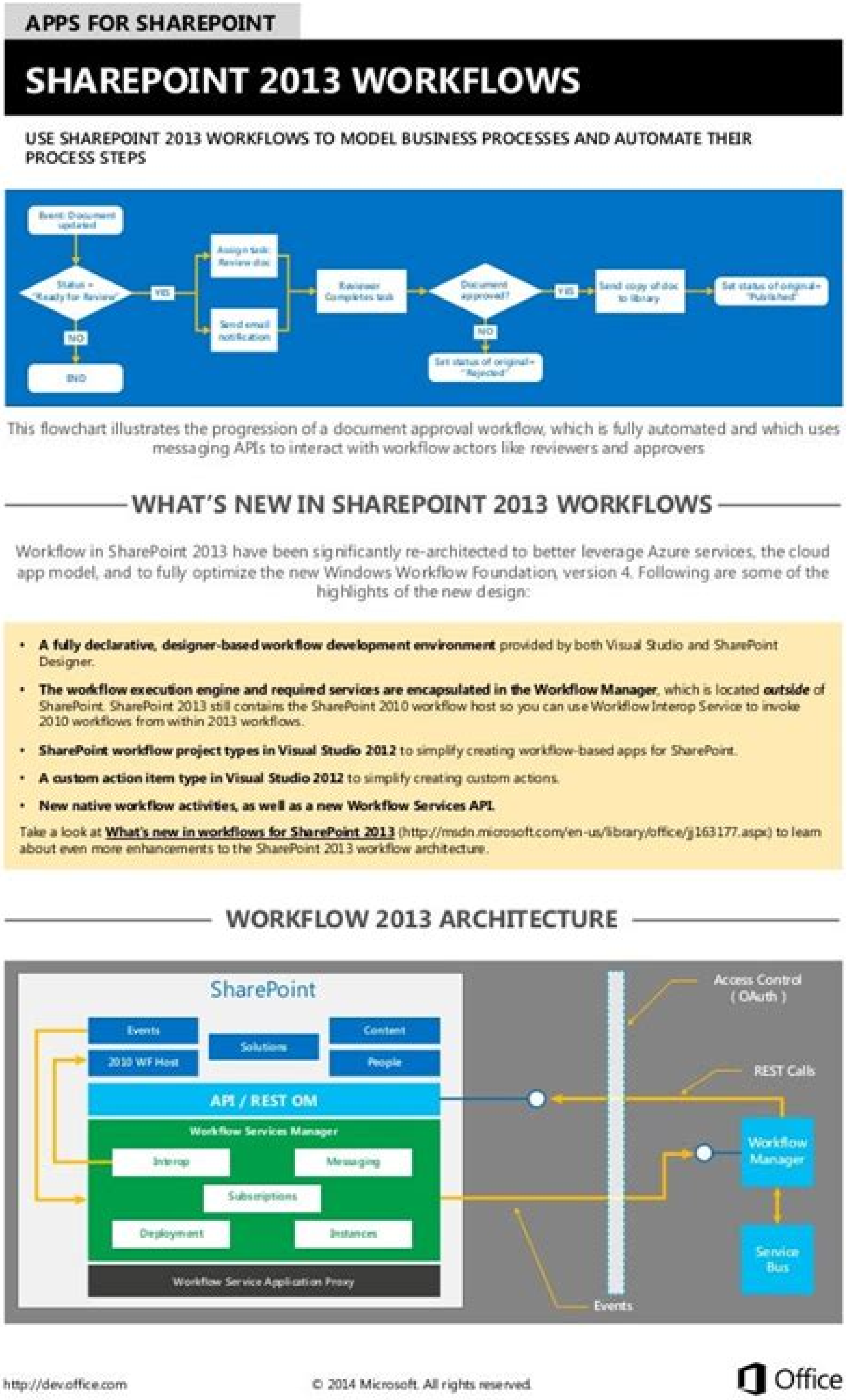
Workflows In Sharepoint 2013



APPS FOR SHAREPOINT

SHAREPOINT 2013 WORKFLOWS

USE SHAREPOINT 2013 WORKFLOWS TO MODEL BUSINESS PROCESSES AND AUTOMATE THEIR PROCESS STEPS

Event: Document updated
Status = "Ready for Review"
YES
NO
END
Assign task: Review doc
Send email notification
Reviewer Completes task
Document approved?
YES
NO
Set status of original= "Rejected"
Send copy of doc to library
Set status of original= "Published"

This flowchart illustrates the progression of a document approval workflow, which is fully automated and which uses messaging APIs to interact with workflow actors like reviewers and approvers

WHAT'S NEW IN SHAREPOINT 2013 WORKFLOWS

Workflow in SharePoint 2013 have been significantly re-architected to better leverage Azure services, the cloud app model, and to fully optimize the new Windows Workflow Foundation, version 4. Following are some of the highlights of the new design:

- **A fully declarative, designer-based workflow development environment** provided by both Visual Studio and SharePoint Designer.
- **The workflow execution engine and required services are encapsulated in the Workflow Manager**, which is located **outside** of SharePoint. SharePoint 2013 still contains the SharePoint 2010 workflow host so you can use Workflow Interop Service to invoke 2010 workflows from within 2013 workflows.
- **SharePoint workflow project types in Visual Studio 2012** to simplify creating workflow-based apps for SharePoint.
- **A custom action item type in Visual Studio 2012** to simplify creating custom actions.
- **New native workflow activities, as well as a new Workflow Services API.**

Take a look at **What's new in workflows for SharePoint 2013** (http://msdn.microsoft.com/en-us/library/office/jj163177.aspx) to learn about even more enhancements to the SharePoint 2013 workflow architecture.

WORKFLOW 2013 ARCHITECTURE

SharePoint
Events
2010 WF Host
Solutions
Content
People
API / REST OM
Workflow Services Manager
Interop
Messaging
Subscriptions
Deployment
Instances
Workflow Service Application Proxy
Access Control (OAuth)
REST Calls
Workflow Manager
Service Bus
Events

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Workflows in SharePoint 2013 are an essential feature that enables organizations to automate business processes and improve collaboration among team members. Workflows streamline tasks, enhance productivity, and ensure consistency by defining a series of actions that can be automatically executed based on specific triggers. This article delves into the various aspects of workflows in SharePoint 2013, including their types, creation, management, and best practices.

Understanding Workflows in SharePoint 2013

Workflows in SharePoint 2013 are designed to manage and automate processes across different departments. They allow users to define a sequence of actions that need to be completed, such as document approval, task assignment, and notifications. By using workflows, organizations can ensure that tasks are completed efficiently and that all stakeholders are informed throughout the process.

Types of Workflows

SharePoint 2013 includes several types of workflows that cater to different business needs:

1. **List Workflows**: These workflows are associated with a specific list or library and are triggered by events related to items within that list. For example, a list workflow can be initiated when a new document is added or when an existing document is modified.

2. **Reusable Workflows**: These are workflows that can be created once and reused across multiple lists or libraries. Reusable workflows allow for consistency in process management across different departments.

3. **Site Workflows**: These workflows are not tied to any specific list or library and can be used to manage processes that span multiple lists or libraries within a site.

4. **Third-Party Workflows**: SharePoint 2013 supports custom workflows developed using third-party tools like Nintex or K2. These workflows can provide added functionality and flexibility beyond the out-of-the-box solutions.

Creating Workflows in SharePoint 2013

Creating workflows in SharePoint 2013 can be accomplished through SharePoint Designer or by using Visual Studio for more complex workflows. Below are the steps to create a simple list workflow using SharePoint Designer:

Using SharePoint Designer

1. Open SharePoint Designer: Start by launching SharePoint Designer and connecting to

your SharePoint site.

2. Select the List or Library: Navigate to the Lists and Libraries section and select the desired list or library where you want to create the workflow.

3. Create a New Workflow: Click on the "Workflows" option in the left-hand menu, then select "List Workflow" and choose the list or library you are working with.

4. Define Workflow Properties: In the workflow settings, provide a name, description, and set the workflow to start automatically on item creation, modification, or manually as needed.

5. Design the Workflow: Use the workflow designer to add actions, conditions, and logic. Common actions include sending emails, updating fields, and creating tasks.

6. Publish the Workflow: Once you have designed the workflow, click on the "Publish" button to make it available for use.

Using Visual Studio

For more advanced workflows, developers can utilize Visual Studio to create custom solutions. Here’s a brief overview of the process:

1. Create a New Project: In Visual Studio, create a new SharePoint 2013 project and select the Workflow template.

2. Define Workflow Logic: Use the visual designer to create the workflow logic, adding actions, conditions, and custom code as necessary.

3. Deploy the Workflow: After building and testing the workflow, deploy it to your SharePoint site. This usually involves packaging the solution and uploading it to the SharePoint app catalog.

Managing Workflows

Once workflows are created, managing them effectively is crucial for ensuring they run smoothly. Here are some key aspects of workflow management in SharePoint 2013:

Monitoring Workflow Status

SharePoint 2013 provides a workflow status page where users can track the progress of workflows. Users can view:

- Current Status: Indicates whether the workflow is completed, in progress, or has failed.
- History: Displays a log of actions taken during the workflow, including who performed

them and when.
- Errors: Identifies any issues that have occurred and provides details for troubleshooting.

Editing Workflows

If a workflow needs to be modified, it can be edited in SharePoint Designer. Here’s how:

1. Open the Workflow: Navigate to the Workflows section in SharePoint Designer and select the workflow you want to edit.

2. Make Changes: Modify the actions, conditions, or any other settings as required.

3. Publish Updates: After making changes, publish the workflow again to apply the updates.

Deleting Workflows

If a workflow is no longer needed, it can be deleted to prevent confusion. This can be done from the Workflows section in SharePoint Designer or directly from the SharePoint site interface.

Best Practices for Workflows in SharePoint 2013

To maximize the effectiveness of workflows in SharePoint 2013, consider the following best practices:

- **Define Clear Objectives**: Before creating a workflow, clearly outline the objectives and desired outcomes. Understanding what you want to achieve will help in designing a more effective workflow.

- **Keep It Simple**: Avoid over-complicating workflows. Simple workflows are easier to manage and less prone to errors.

- **Test Thoroughly**: Before deploying a workflow, conduct thorough testing to identify and resolve any issues. Ensure that all possible scenarios are considered.

- **Document Workflows**: Maintain documentation for each workflow, including purpose, steps, and any relevant details. This will assist in training new users and troubleshooting issues.

- **Regularly Review and Update**: Periodically review workflows to ensure they remain relevant and efficient. Update workflows as necessary to adapt to changing business processes.

Conclusion

Workflows in SharePoint 2013 offer a powerful way to automate and manage business processes effectively. By understanding the types of workflows available, knowing how to create and manage them, and adhering to best practices, organizations can enhance productivity and collaboration. Whether using built-in features or custom solutions, effective workflow management can lead to significant improvements in operational efficiency. As organizations continue to evolve, leveraging workflows will remain a critical component of achieving streamlined processes and successful project outcomes.

Frequently Asked Questions

What are the main benefits of using workflows in SharePoint 2013?

Workflows in SharePoint 2013 help automate business processes, improve collaboration, increase efficiency, ensure consistency, and provide better visibility and tracking of tasks.

How can I create a custom workflow in SharePoint 2013?

You can create a custom workflow in SharePoint 2013 using SharePoint Designer. Simply open SharePoint Designer, connect to your site, select 'Workflows', and use the workflow designer to define your workflow actions, conditions, and stages.

What types of workflows are available in SharePoint 2013?

SharePoint 2013 offers several types of workflows including reusable workflows, list workflows, site workflows, and declarative workflows that can be designed using SharePoint Designer or Visual Studio.

How do I troubleshoot a workflow that is not starting in SharePoint 2013?

To troubleshoot a workflow that is not starting, check the workflow settings, ensure that the workflow service is enabled, review any associated list or library permissions, and examine the workflow history for error messages.

Can I integrate SharePoint 2013 workflows with other systems?

Yes, you can integrate SharePoint 2013 workflows with other systems using custom web services, REST APIs, or third-party tools like Nintex or K2, enabling you to automate processes across different platforms.

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Discover how to optimize workflows in SharePoint 2013 for improved efficiency and collaboration. Learn more about essential tips and best practices!

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