

Workflow Designer - New Travel

Step Name: Set Initial Variables

Specify details for 'Set Initial Variables'

Choose the conditions and actions that define this step of the workflow.

Conditions

Actions

Set Variable: SiteName to RogersLaura
then Store https://endusersharepo... in Variable: TravelReqURL

[Add 'Else If' Conditional Branch](#)

Workflow Steps

- Set Initial Variables
- Check New Traveler
- First Approval
- Department Approval Resp...
- Chief Travel Officer Approval
- CTO Response
- [Add workflow step](#)

String Builder

Name:

https://endusersharepoint.securespsites.com/[%Variable: SiteName%]/travel/Lists/TravelRequests/DispForm.aspx?ID=[%Travel Requests:ID%]

Step Name:

Specify details for 'Check New Traveler'

Choose the conditions and actions that define this step of the workflow.

If Travel Requests:Requestor equals Travelers:Full Name

Create item in Travelers (Output to Variable: NewTraveler)
 then Store https://endusersharepo... in Variable: TravelerURL
 then Email Travel Requests:Requestor

[Add 'Else If' Conditional Branch](#)

Workflow Steps

- Set Initial Variables
- Check New Traveler
- First Approval
- Department Approval Resp...
- Chief Travel Officer Approval
- CTO Response
- [Add workflow step](#)

Select Users

Type a Name or E-mail Address:

Selected Users:

Or select from existing Users and Groups:

- User from address book...
- Workflow Lookup...
- User who created current item
- 2008-11-11-CreateAMasterCalendar
- 2008-11-25-Basics of Content
- 2008-11-25-BasicsOfContent
- 2009-02-06-SharePoint Super
- 2009-02-13-SharePointSuper
- 2009-03-06-SharePointSuper
- 2009-03-24-ExcelAndShareP
- 2009-04-28-SuperStar
- 2009-05-08-TrainTheTrainer
- 2009-05-15-DVWP Members
- 2009-05-15-DVWP Owners
- 2009-05-15-DVWP Visitors

Define Workflow Lookup

Lookup Details

Choose the data source and field to perform the lookup on:

Source: Field:

Find the List Item

Choose a field from the selected list and a matching value to identify the specific item you want from the list:

Field: Value:

Create New List Item ? X

List: Travelers

Field	Value
Company (*)	Acme
Full Name	Travel Requests:Requ...
Number of Trips	1

Add...
Modify...
Remove

String Builder ? X

Name:

```
https://endusersharepoint.securespsites.com/[%Variable: SiteName%]/travel/Lists/Travelers/EditForm.aspx?ID=[%Variable: NewTraveler%]
```

Define E-mail Message ? X

To: Travel Requests:Requestor

CC:

Subject: Traveler Information Needed

Please Click here to fill in your traveler information, to associate with the request, since this is your first request on the site.

Step Name:

Specify details for 'First Approval'

Choose the conditions and actions that define this step of the workflow.

Conditions ▾

Actions ▾


Collect Department Approval from **Approvers:Approver Name** (Output to Variable: DeptTaskID)

[Add 'Else IF' Conditional Branch](#)

Workflow Steps

- Set Initial Variables
- Check New Traveler
- First Approval**
- Department Approval Respo
- Chief Travel Officer Approva
- CTO Response
- [Add workflow step](#)

Custom Task Wizard [?] [X]



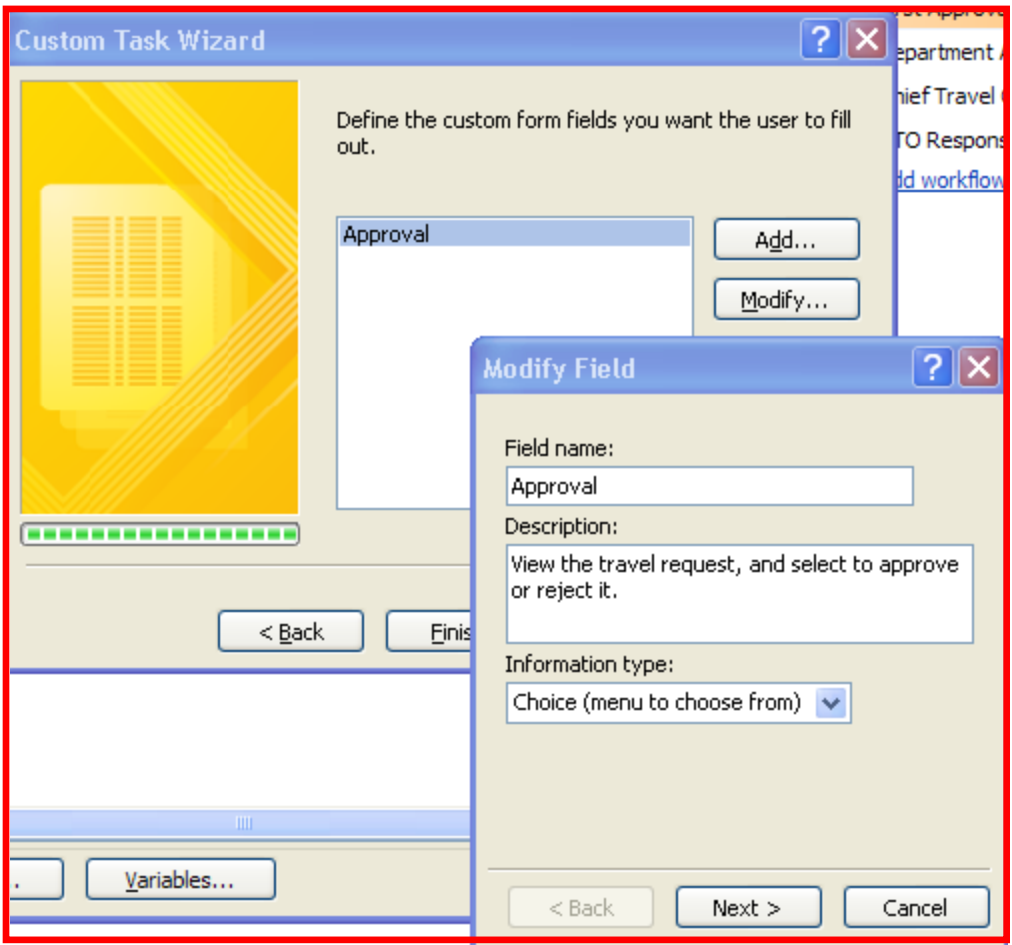
Enter a title and description that explains to the recipient the purpose of this task. This information will be displayed in the item added to the Tasks list.

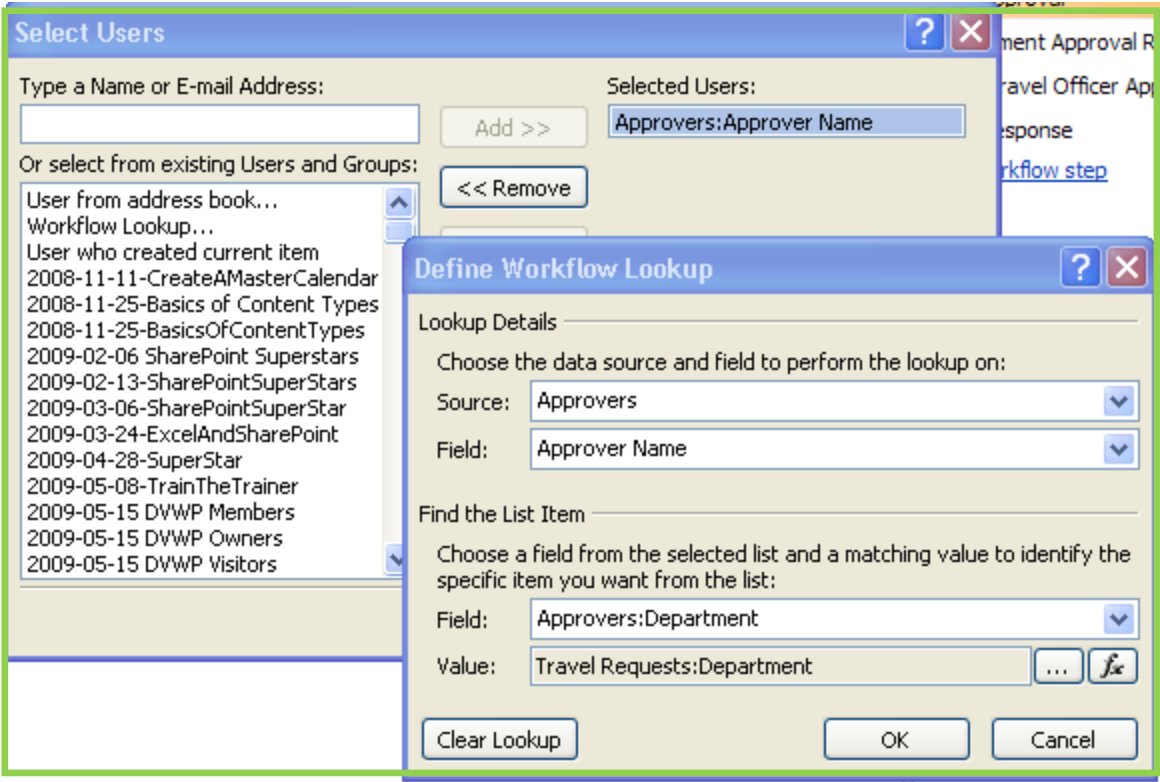
Name:

Description:

You can set other task fields, like Expires, by adding a secondary workflow to the Tasks list.
[Click here for more information.](#)

< Back Next > Cancel





Workflow Designer - New Travel

Step Name: Department Approval Response

Specify details for 'Department Approval Response'

Choose the conditions and actions that define this step of the workflow.

Conditions: If **Tasks:Department Approval** equals **Reject**

Actions: Email **Travel Requests:Requestor**
 then Set content approval status to **Rejected** with **rejected by department approver**
 then Stop the workflow and log **reject by department and workflow stopped**

[Add 'Else If' Conditional Branch](#)

Workflow Steps

- Set Initial Variables
- Check New Traveler
- First Approval
- Department Approval Response**
- Chief Travel Officer Approval
- CTO Response
- [Add workflow step](#)

Define Workflow Lookup

Lookup Details

Choose the data source and field to perform the lookup on:

Source: **Tasks**

Field: **Department Approval**

Find the List Item

Choose a field from the selected list and a matching value to identify the specific item you want from the list:

Field: **Tasks:ID**

Value: **Variable: DeptTaskID**

[Clear Lookup](#) [OK](#) [Cancel](#)

Define E-mail Message

To: **Travel Requests:Requestor**

CC:

Subject: **Travel Request Rejected**

Your Travel Request to go to **[%Travel Requests:Destination%]** has been denied at the department level

Workflow Designer - New Travel

Step Name: Chief Travel Officer Approval

Specify details for 'Chief Travel Officer Approval'

Choose the conditions and actions that define this step of the workflow.

Conditions

Actions

Collect CTO Approval from Chief Travel Officer. (Output to Variable: CTOtaskID.)

[Add 'Else If' Conditional Branch](#)

Workflow Steps

- Set Initial Variables
- Check New Traveler
- First Approval
- Department Approval Response
- Chief Travel Officer Approval
- CTO Response

[Add workflow step](#)

Custom Task Wizard

Enter a title and description that explains to the recipient the purpose of this task. This information will be displayed in the item added to the Tasks list.

Name:

CTO Approval

Description:

This is the CTO approval of a travel request

You can set other task fields, like Expires, by adding a secondary workflow to the Tasks list.

[Click here for more information.](#)

< Back Next > Cancel

Custom Task Wizard [?] [X]

Define the custom form fields you want the user to fill out.

CTO Approval [Add...] [Modify...]

< Back Finish

tion... Variables...

Modify Field [?] [X]

Field name: CTO Approval

Description:

Information type: Choice (menu to choose from) [v]

< Back Next > Cancel

Modify Field [?] [X]

Choices (enter each choice on a separate line):

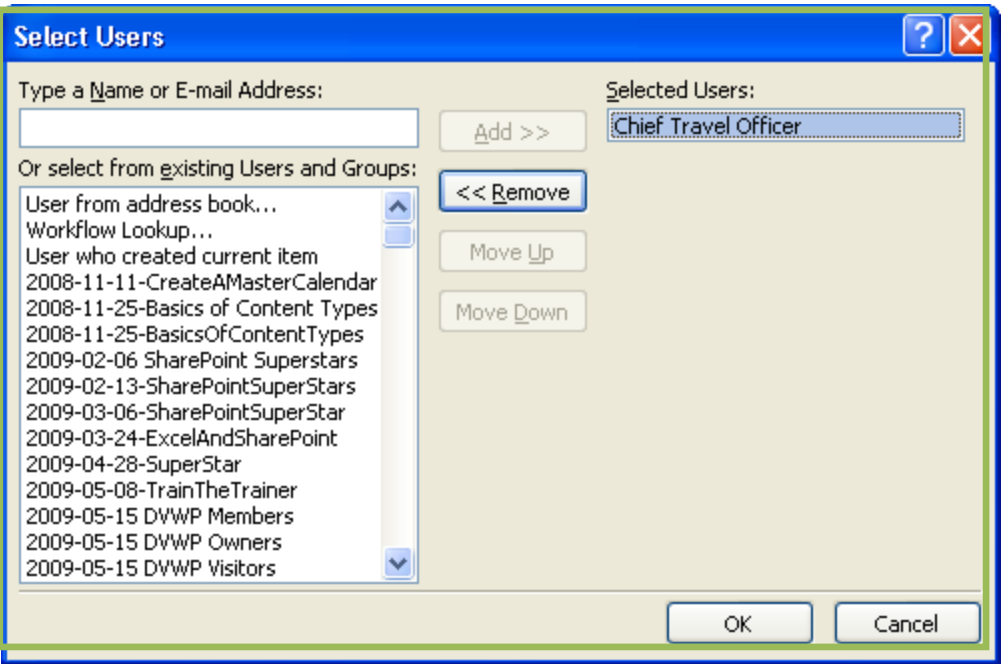
Approve
Reject

Default value:

Display as: Radio buttons [v]

Allow "Fill-in" choices Allow blank values?

< Back Finish Cancel



Step Name: CTO Response

Specify details for 'CTO Response'

Choose the conditions and actions that define this step of the workflow.

Conditions: If **Tasks:CTO Approval** equals **Reject**

Actions: Email **Travel Requests:Requestor**
then Set content approval status to **Rejected** with **request rejected by Chief tra**

Conditions:

Actions: Email **Travel Requests:Requestor**
then Calculate **Travelers:Number of Trips** plus **1** (Output to Variable: **AddOne**)
then Update item in **Travelers**
then Set content approval status to **Approved** with **approved by CTO**

Workflow Steps

- Set Initial Variables
- Check New Traveler
- First Approval
- Department Approval Response
- Chief Travel Officer Approval
- CTO Response**
- [Add workflow step](#)

[Add 'Else If' Conditional Branch](#)

Define Workflow Lookup

Lookup Details

Choose the data source and field to perform the lookup on:

Source: **Tasks**

Field: **CTO Approval**

Find the List Item

Choose a field from the selected list and a matching value to identify the specific item you want from the list:

Field: **Tasks:ID**

Value: **Variable: CTOtaskID**

Buttons: Clear Lookup, OK, Cancel

Define E-mail Message

To: **Travel Requests:Requestor**

CC:

Subject: **Travel Rejected by CTO**

Your travel request to go to [%Travel Requests:Destination%] has been rejected by the Chief Travel Officer.

Define E-mail Message [?] [X]

To: [📧]

CC: [📧]

Subject: [fx]

Your travel request has been approved:

Destination: [%Travel Requests:Destination%]
 Departure Date: [%Travel Requests:Departure Date%]

OPEN REQUEST

Define Workflow Lookup [?] [X]

Lookup Details

Choose the data source and field to perform the lookup on:

Source: [v]

Field: [v]

Find the List Item

Choose a field from the selected list and a matching value to identify the specific item you want from the list:

Field: [v]

Value: [⋮] [fx]

[Clear Lookup] [OK] [Cancel]

Update List Item [?] [X]

List: [v]

Field	Value
Number of Trips	Variable: AddOne

[Add...]
 [Modify...]
 [Remove]

Find the List Item

Choose a field from the selected list and a matching value to identify the specific item you want from the list:

Field: [v]

Value: [⋮] [fx]

[OK] [Cancel]