



SHAREPOINT 911

THE SHAREPOINT AUTHORITY

SharePoint Designer 2010 Workflow: A Case Study

By Laura Derbes Rogers

SharePoint911

SharePoint911

- SharePoint911 was established in 2004 to draw on Shane Young's extensive experience with systems administration and with consulting for clients on SharePoint issues. Over the past several years, SharePoint911 has expanded and evolved. While our ability to respond quickly to specific needs makes us unique, we also offer comprehensive consulting services. Not only do we have extensive, real world experience, but our consultants also teach, write about, and speak on various SharePoint topics.

We truly are "The SharePoint Authority!"

<http://www.sharepoint911.com>

About the Speaker...

- Laura Rogers, MCSE, MCTS
 - Grew up in Metairie, Luling, and Baton Rouge, and went to LSU
 - Contributing Author, *Microsoft Office SharePoint Server 2007 Administrator's Companion*. Wrote Chapter 29, about the Out-of-Box Web Parts
 - My blog: sharepoint911.com/blogs/Laura
 - Everyone's tweeting about SharePoint. Follow me on twitter. @[WonderLaura](https://twitter.com/WonderLaura)



Agenda

- Introduction to basic workflow concepts
- Types of Workflows in SharePoint
- Demonstration of a Travel Request Workflow in SharePoint Designer 2010.



Introduction - Concepts

- Triggers
 - Manual, on Creation, on Change
- Conditions
 - If *WHAT* then do something
- Actions
 - This is the *something* that happens according to the condition
- Steps
 - The order of progression of the workflow

Types of Workflows in 2007

- SharePoint out-of-box
 - Not customizable
 - Simplistic
- SharePoint Designer
 - Customizable in easy interface
 - Not scalable
- Visual Studio
 - Requires developer resources, but is scalable
- 3rd Party

Types of Workflows in 2010

- SharePoint out-of-box
 - Customizable now
 - Simplistic
- SharePoint Designer
 - Customizable in easy interface
 - Scalable now
- Visual Studio
 - Requires developer resources, highly customizable
- 3rd Party

Travel Workflow Components

Travel Request Submitted

Departmental Approval

Travel Officer Approval

Completion



The SharePoint site

- Travel Requests
 - This is the main list for the requests themselves. Workflow is based on this list.
- Travelers
 - For your first request, fill out information such as frequent flier and airplane seat preferences
- Tasks
 - These are assigned to approvers throughout the workflow
- Departments
 - Each company department has a person in charge of approving travel requests for their department.



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DEMO

Travel Request Workflow Demonstration

Thanks for Coming!

- Don't forget to visit my blog:
<http://sharepoint911.com/blogs/Laura>
- Check out my Data View Web Part series on endusersharepoint.com
- Catch me on Stump the Panel on endusersharepoint.com, and on Microsoft's SharePoint forums.