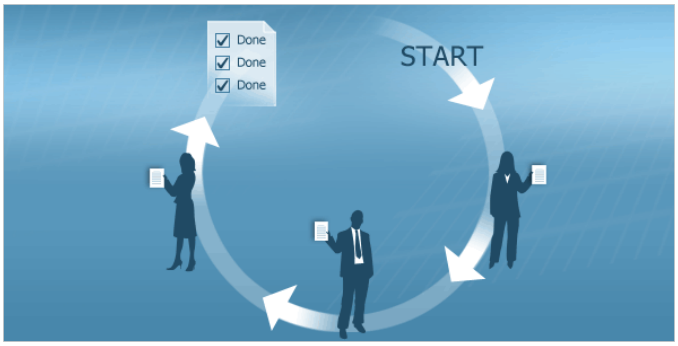
The Microsoft SharePoint environment is a powerful, integrated and secure Internet workplace that allows users to communicate, collaborate, manage documents, capture tasks, schedule events, solve problems and achieve consensus in a central location. Our reference card serves as an introduction and summary of how to use workflows, or automated processes that route documents for various types of review.

Introduction to Workflows
Microsoft SharePoint Workflows help people collaborate on documents and manage project tasks by implementing business processes on documents and items in a Microsoft Office SharePoint Server 2007 site.



A workflow is often described as a series of tasks that produce an outcome. Within Microsoft SharePoint, a workflow is more narrowly described as the automated movement of documents or items through a sequence of actions or tasks that are related to a business process.

Workflows can be used to consistently manage common business processes within an organization by enabling the organization to attach business logic to documents or items in a SharePoint list or library. Business logic is basically a set of instructions that specifies and controls the actions that happen to a document or item.

The person who needs the file reviewed starts the workflow. A detailed description of the process follows. When everyone is done, a web page summarizes the workflow and serves as a record of who was involved.

When you save a file to a document library on a Microsoft Office SharePoint Server 2007 site you have the following three workflows available to you:

Approval Workflow: This workflow routes a document or item to a group of people for approval. By default, the approval workflow is associated with the document content type, and is automatically available in document libraries. A version of the Approval workflow is also associated by default with the pages library in a publishing site, and it can be used to manage the approval process for the publication of Web pages.

Collect Feedback Workflow: This workflow routes a document or item to a group of people for feedback. Reviewers can provide feedback, which is then compiled and sent to the person who initiated the workflow. By default, the collect feedback workflow is associated with the document content type, and is automatically available in document libraries.

Collect Signatures Workflow: This workflow routes a Microsoft Office document to a group of people to collect their digital signatures. This workflow must be started in a client program that is part of the 2007 Office release. Participants must complete their signature tasks by adding their digital signature to the document in the relevant Microsoft Office program. By default, the collect signatures workflow is associated with the document content type, and it is automatically available in the document libraries. However, the collect signatures workflow appears for a document in the document library only if that document contains one or more Microsoft Office Signature Lines.

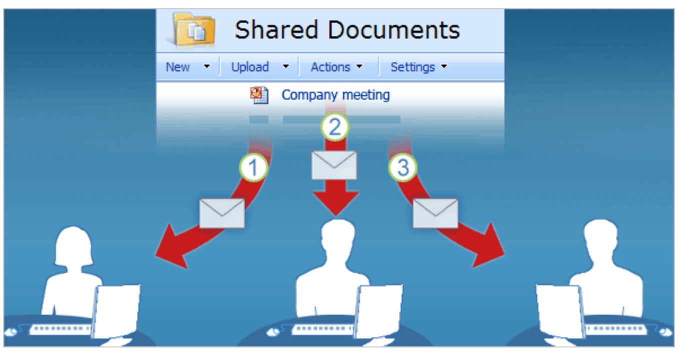
Adding a workflow to a list, library, or content type

Before a workflow can be used it must be added to a list, library or content type to make it available. You must have appropriate Manage Lists Permissions to add a workflow to a list, library, or content type. Typically, the site administrators or individuals who manage specific lists or libraries perform this task.

The availability of a workflow within a site varies, depending on where it is added:

- If you add a workflow directly to a list or library, it is available only for items in that list or library.
- If you add a workflow to a list content type (an instance of a site content type that was added to a specific list or library), it is available only for items of that content type in the specific list or library with which that content type is associated.
- If you add a workflow to a site content type, that workflow is available for any items of that content type in every list and library to which an instance of that site content type was added. If you want a workflow to be widely available across lists or libraries in a site collection for items of a specific content type, the most efficient way to achieve this result is by adding that workflow directly to a site content type.

How to start the Approval Workflow



- Upload or save a Microsoft Excel 2007 workbook, a Microsoft PowerPoint 2007 presentation, or a Microsoft Office Word 2007 document to a document library on a Microsoft Office SharePoint Server 2007 site.
- Go to the document library using your Web browser. Hover over the file, click the down arrow, and then click **Workflows**.
- Click the link for the **Approval** workflow.
- Type e-mail addresses for each reviewer.
- If you want to include a message or specific task instructions, type under **Type a message to include with your request**.
- Under **Due Date**, type a number, and then select either **Day(s)** or **Week(s)** as the increment of time.
- Click **Start**.

Once you click **Start** and begin the workflow an email message is sent to the first approver. Your SharePoint site calls this email message a task because essentially, it is a "to do" item. The task is sent to each approver **one at a time**, in the order that was specified when the workflow was initiated. If someone neglects to approve the file, it could hold up the next person, but the initiator of the workflow can set due dates so that the workflow will send a reminder message.

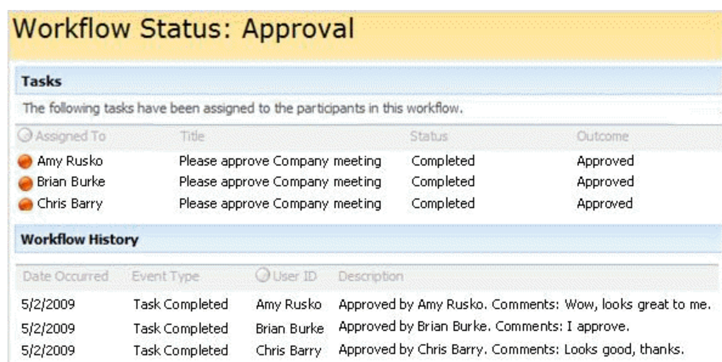
Complete a task

- In the task e-mail message, click the link to the file that is displayed under **To complete this task**.
- Review the file.
- To mark your task as completed, click the **Edit this Task** button.
- Type a brief comment, and then click either **Approve** or **Reject**.

How to complete a workflow task if the "Edit this Task" button is unavailable

- In the task e-mail message, click the **here** link at the bottom of the message.
  - Your browser will open and the task page will appear.
  - Type any comments you have, and then click either **Approve** or **Reject**.

When the workflow is complete, the **Workflow Status** page summarizes the activity for the workflow. The initiator of the workflow also receives a handy email with notification that the workflow is complete.



Workflow Status: Approval

Tasks

The following tasks have been assigned to the participants in this workflow.

Assigned To	Title	Status	Outcome
Amy Rusko	Please approve Company meeting	Completed	Approved
Brian Burke	Please approve Company meeting	Completed	Approved
Chris Barry	Please approve Company meeting	Completed	Approved

Workflow History

Date Occurred	Event Type	User ID	Description
5/2/2009	Task Completed	Amy Rusko	Approved by Amy Rusko. Comments: Wow, looks great to me.
5/2/2009	Task Completed	Brian Burke	Approved by Brian Burke. Comments: I approve.
5/2/2009	Task Completed	Chris Barry	Approved by Chris Barry. Comments: Looks good, thanks.

What if you need to cancel a workflow?

Go to the **Workflow Status** page and click **Cancel this Workflow**. That will stop the workflow and generate a notification that the workflow is cancelled.

The tasks whether completed or not will still remain on the status page, just in case you wish to keep them on record.

How to start the Collect Feedback Workflow

- Upload or save a Microsoft Office Excel 2007 workbook, a Microsoft Office PowerPoint 2007 presentation, or a Microsoft Office Word 2007 document to a document library on a Microsoft Office SharePoint Server 2007 site.
- Go to the document library using your Web browser. Hover over the file, click the down arrow, and then click **Workflows**.
- Click the link for the **Collect Feedback** workflow.
- Type e-mail addresses for each reviewer.
- If you want to include a message or specific task instructions, type under **Type a message to include with your request**.
- Under **Due Date**, type a number, and then select either **Day(s)** or **Week(s)** as the increment of time.
- Click **Start**.

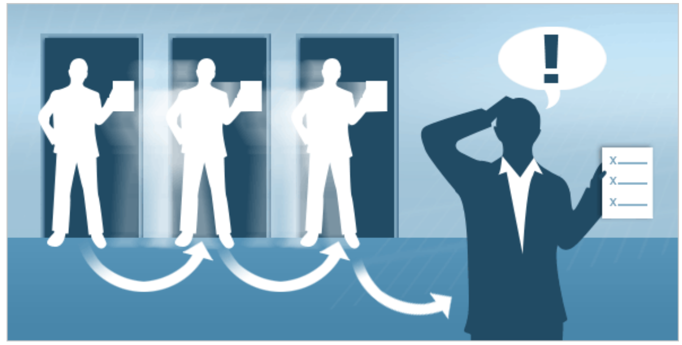
Complete a task

- In the task e-mail message, click the link to the file that is displayed under **To complete this task**.
- Review the file.
- To make changes to the file, click **Edit Document** or **Check out**.
- When you are done changing the file, click the **Edit this Task** button at the top of the document text.
- Type a brief comment, and then click **Send Feedback**.

To require check-out for files

- To require check-out for files, you must have permission to design a list or library.
- Go to the library in your Web browser.
- On the **Settings** menu, click **Document Library Settings**.
- Under **General Settings**, click **Versioning Settings**. In the **Require Check Out** section, under **Require Documents to be checked out before they can be edited**, click **Yes**.

How to Insert Digital Signature Lines



- Upload or save a Microsoft Office Excel 2007 workbook or a Microsoft Office Word 2007 document to a document library on an Microsoft Office SharePoint Server 2007 site.
- Go to the document library using your Web browser. Click the name of the file, and then click **Edit**.
- On the **Insert** tab, click **Signature line**.
- In the **Signature Setup** dialog box, type information about the person who will be signing on this signature line. Click **OK**. To add additional signature lines, repeat steps 3 and 4 for each person.
- Save the file.

How to start the Collect Signatures Workflow

- Click the **Microsoft Office Button**, and then click **Workflows**.
- Locate the **Collect Signatures** workflow, and then click **Start**.
- Click the **Check names** button for each signer.
- Click **Start**.

Sign a file

- In the task e-mail message, click the link to the document that is displayed under **To complete this task**.
- In the document, double-click the signature line where your signature is requested. In the **Sign** dialog box, do one of the following:
  - Type your name.
  - To select an image of your written signature, click **Select Image**. In the **Select Signature Image dialog box**, find the location of your signature image file, select the file that you want, and then click **Select**.
  - To add a handwritten signature (Tablet PC users only), sign your name in the box next to the **X** by using the inking feature.
- Click **Sign**.