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- 5 Seasons Brewery (North)
- Right after the event ends
- The parking is located directly in front of brewery
- See the SPSATL Website for more info and directions
Laura Rogers, Microsoft MVP

I live in Birmingham, Alabama

Company: Rackspace

Author of six SharePoint books

Blog: http://www.wonderlaura.com

Follow me on twitter: @WonderLaura
My Latest Books

Beginning SharePoint 2013: Building Business Solutions

Using Microsoft InfoPath 2010 with Microsoft SharePoint 2010 Step by Step
Introduction

Business Process - Factors

Options in SharePoint

Task Process Pros and Cons

Real world workflow scenarios
Business Process Factors

Introduction
<table>
<thead>
<tr>
<th><strong>Business Process Factors</strong></th>
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<tbody>
<tr>
<td>Parallel and serial portions of the workflow</td>
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<td>Email notifications versus task assignment</td>
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<td>User Interface Planning</td>
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<td>Task dependency on other task(s)</td>
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<tr>
<td>Interaction with other systems/databases?</td>
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<td>Outcomes (approve/reject versus completions)</td>
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</table>
Parallel and serial tasks
Notifications Versus Tasks
User Interface Planning
Branching
Workflow branching and dependencies
Data Interactions with external data
Outcomes
Approvals versus completions
Options in SharePoint

Types of approvals
Content Approval

Out-of-Box Workflows (2010)

Task actions in SharePoint Designer workflows

Custom tasks / Complex processes
DEMO

Simple Types of Approvals (the first 3)
## Task Process

**Task action changes**

<table>
<thead>
<tr>
<th>Year</th>
<th>Task Actions</th>
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<tbody>
<tr>
<td>2010</td>
<td>Assign a Form to a Group</td>
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<tr>
<td></td>
<td>Assign a To-do Item</td>
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<tr>
<td></td>
<td>Collect Data from a User</td>
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<tr>
<td></td>
<td>Start Approval Process</td>
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<tr>
<td></td>
<td>Start Custom Task Process</td>
</tr>
<tr>
<td></td>
<td>Start Feedback Process</td>
</tr>
<tr>
<td>2013</td>
<td>Assign a task</td>
</tr>
<tr>
<td></td>
<td>Start a task process</td>
</tr>
</tbody>
</table>
### Pros
- Easy to set up / easy interface
- Built in notification emails
- Configurable overdue reminders
- Can assign tasks to all the individuals in a group
- Configurable task completion criteria

### Cons
- Can’t set extra task field values
- No lookup relationship to task list
- Tasks delete themselves after 60 days
- Difficult to do multiple task titles / descriptions
- Parallel task challenges
  - Easy if all identical (such as everyone approve this)
  - Impossible if working with varying task names.

---

**Task Process**

Task actions – pros and cons
DEMO

Task Process in SharePoint 2013
Real World Scenarios
Custom Workflows

New Hire Process
To Be Continued

See part II of this session for the more advanced content
New Hire Workflow Resources

See zip file in here:
http://www.wonderlaura.com/Presentations/Forms/AllItems.aspx

Full 6 hour walk through of creating an advanced solution
https://www.youtube.com/SharePointRax
“Playlists” HR Onboarding SharePoint Site Demo
Thanks for coming!

Come to my advanced presentation:
Creating an Approval Workflow, Part II

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