### Activating Workflows

1. From your SharePoint site, select Site Actions -> Site Settings -> Site Collection Features.

   ![Site Collection Features menu]

2. From the Site Collection Features menu, you can activate the different workflows.
   - a. Disposition Approval Workflow
   - b. Publishing Approval Workflow
   - c. SharePoint 2007 Workflows
   - d. Workflows

### Enabling Workflows on Libraries and Lists

1. Navigate to your document library -> Library tab -> Library Settings

2. Under Permissions and Management, select Workflow Settings.

3. On the following screen, there will be different options for configuring a workflow for the library.

   *For Lists, select the specified list and navigate to List Settings much like you would Library Settings.*

### Working with Workflows

**www.messageops.com**

**Create a Workflow in SharePoint Designer 2010 - Overview**

If the built-in workflows are not sufficient enough for your desired business process, you can easily create and customize workflows using SharePoint Designer 2010.

1. Open up your site using SharePoint Designer 2010.
2. On the left panel, select Workflows.

3. Now from the Workflows window, you can select the type of workflow you wish to create from the top ribbon. These can be List/Content, Reusable, or Site workflows.

<table>
<thead>
<tr>
<th>Ribbon Button</th>
<th>Description/Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Condition</td>
<td>Serves as a rule for the workflow and establishes a condition where the workflow performs the associated action only if that condition is true.</td>
</tr>
<tr>
<td>Action</td>
<td>Most basic unit of a workflow; automated step, such as sending an email if a condition is met.</td>
</tr>
<tr>
<td>Step</td>
<td>Allows you to group and associate conditions and actions.</td>
</tr>
<tr>
<td>Else-If Branch</td>
<td>Used to satisfy if a condition isn’t met, execute alternative action.</td>
</tr>
<tr>
<td>Parallel Block</td>
<td>Execute actions in parallel</td>
</tr>
<tr>
<td>Impersonation Step</td>
<td>Created when workflows need to write to lists or libraries that the person running the workflow does not necessarily have access to.</td>
</tr>
</tbody>
</table>

4. After selecting your Workflow type, you will be presented with a default workflow.
5. To start creating your custom workflow, you will utilize a few different items from the ribbon.
6. As you add conditions and actions to your workflow, you will notice underlined text items.
7. This is where you will designate the list, libraries, columns, values, and various parameters for the workflow to reference.

### Workflow Table

<table>
<thead>
<tr>
<th>Workflow</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disposition Approval</td>
<td>Manages the document expiration and retention process by allowing participants to decide whether to retain or delete expired documents or items.</td>
</tr>
<tr>
<td>Three-State</td>
<td>Designed to track the status of a list item through three states; the workflow assigns a task to a person and sends that person an e-mail alert about the task. When this task is completed, the workflow updates the status of the item and progresses to the next state.</td>
</tr>
<tr>
<td>Publishing Approval</td>
<td>Routes a page to designated people for their approval or rejection.</td>
</tr>
<tr>
<td>Approval</td>
<td>Routes a document or other item to designated people for their approval or rejection.</td>
</tr>
<tr>
<td>Collect Feedback</td>
<td>Routes a document or other item to designated people for their feedback.</td>
</tr>
<tr>
<td>Collect Signatures</td>
<td>Routes a Microsoft Office document to designated people for their digital signatures.</td>
</tr>
</tbody>
</table>