Custom Excel Workflow
Tiffani Marsing
Manager, Client Education
Sigrid Kok
Lead Solutions Engineer
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Course Objectives

Create a Custom Workflow for routing a document.

Deploy a Workflow Solution to a SharePoint Foundation site.

Submit a script and data file to SharePoint Foundation and associate the workflow.

Use a custom Excel Workflow solution.

Agenda

WINSHUTTLE Composer

Excel Workflow Introduction

Working with the Wizard

Change a Workflow

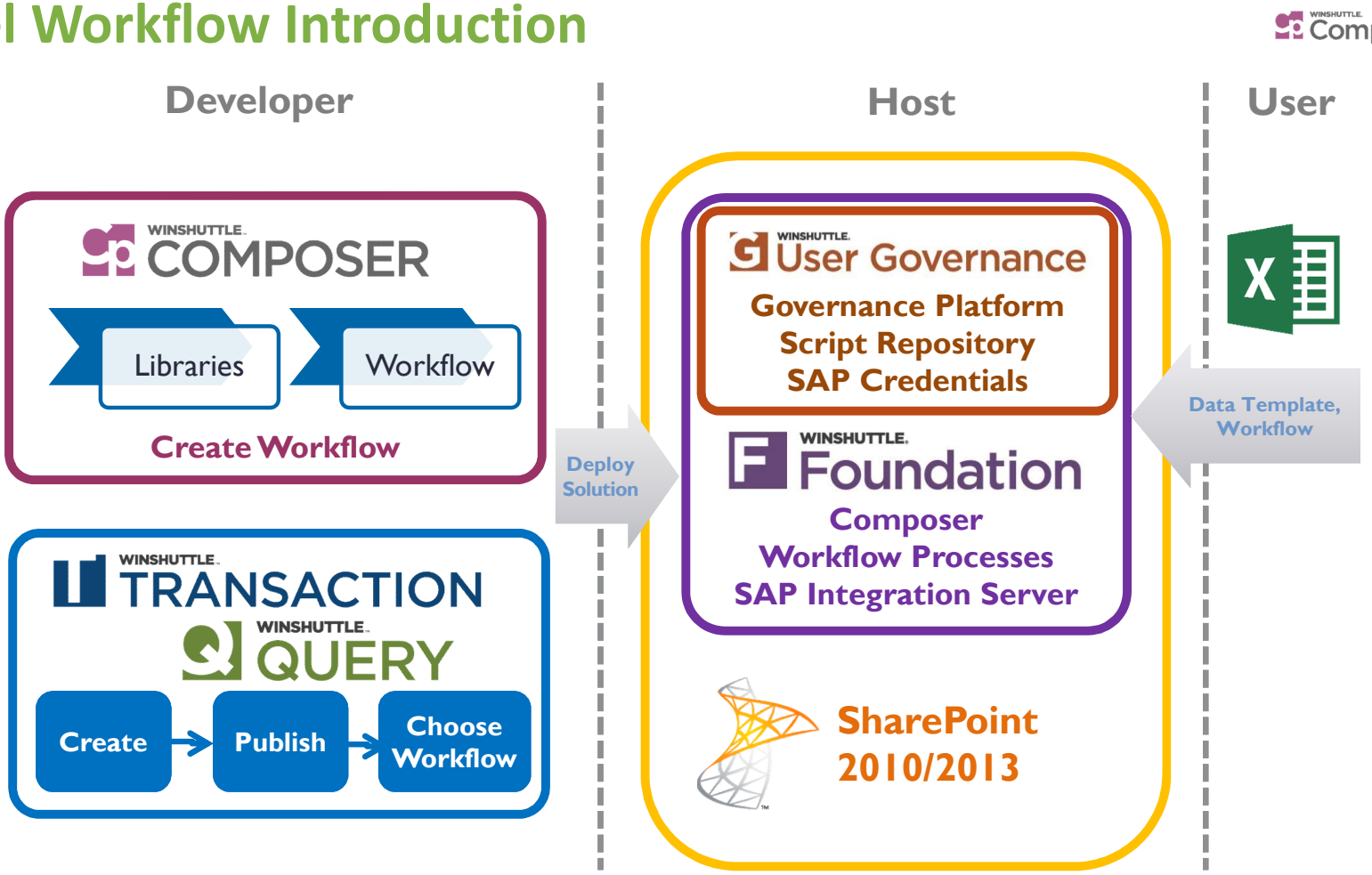
Design the Form

Deploy a Solution

Script/Data Template Submission

How to Get Help

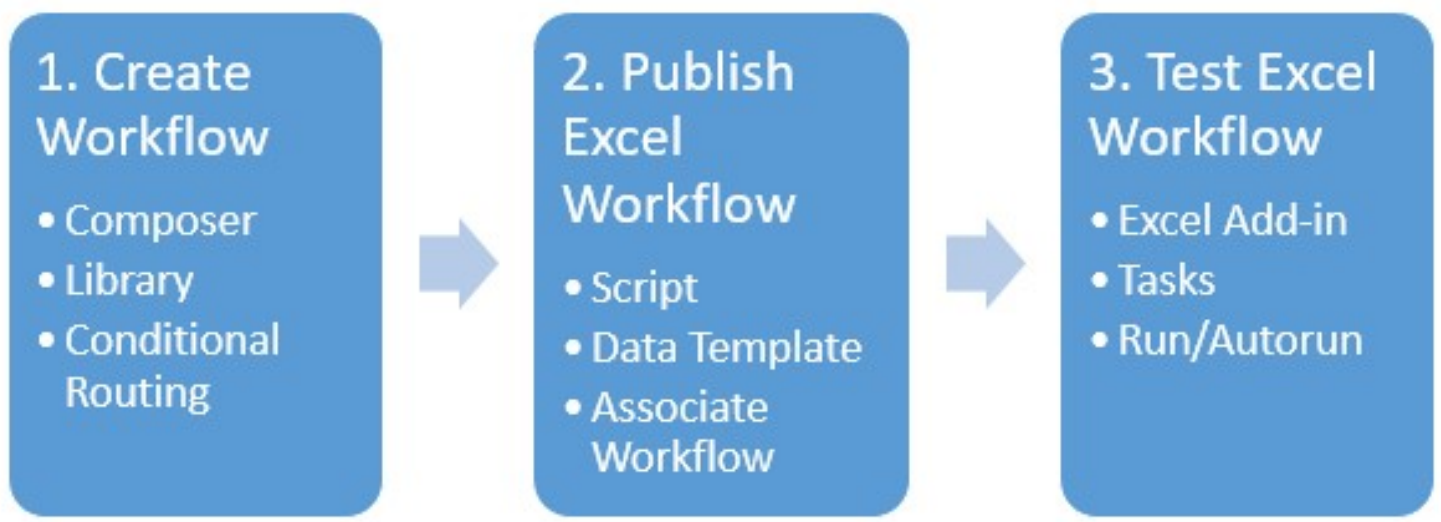
Excel Workflow Introduction



© 201

Excel Workflow Introduction

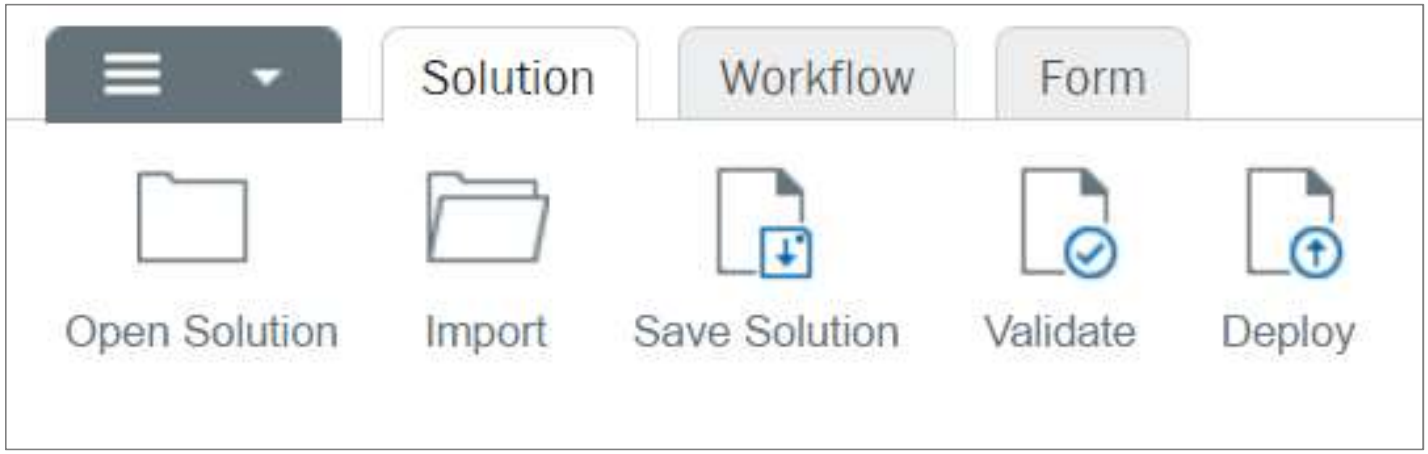
Development Process



Excel Workflow Introduction

Composer

Tabs



Excel Workflow Introduction

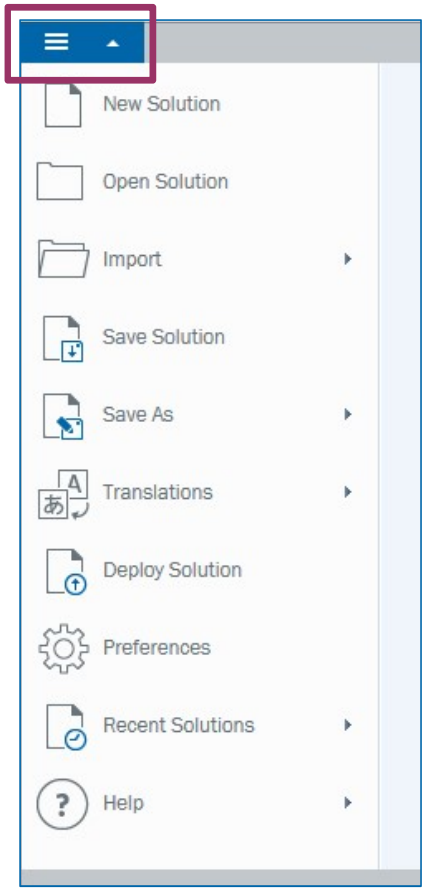
Main Menu

Navigate to options such as:

Translations

Preferences

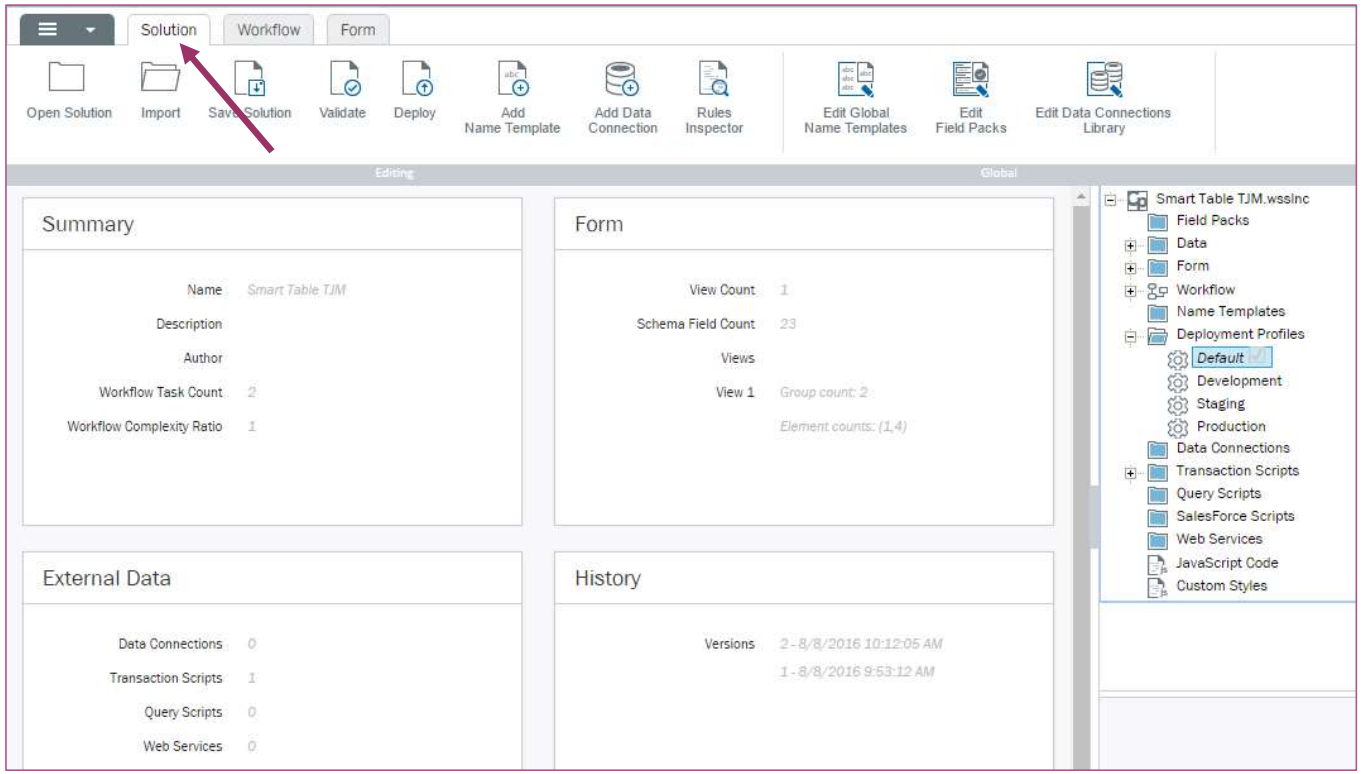
Help



Excel Workflow Introduction

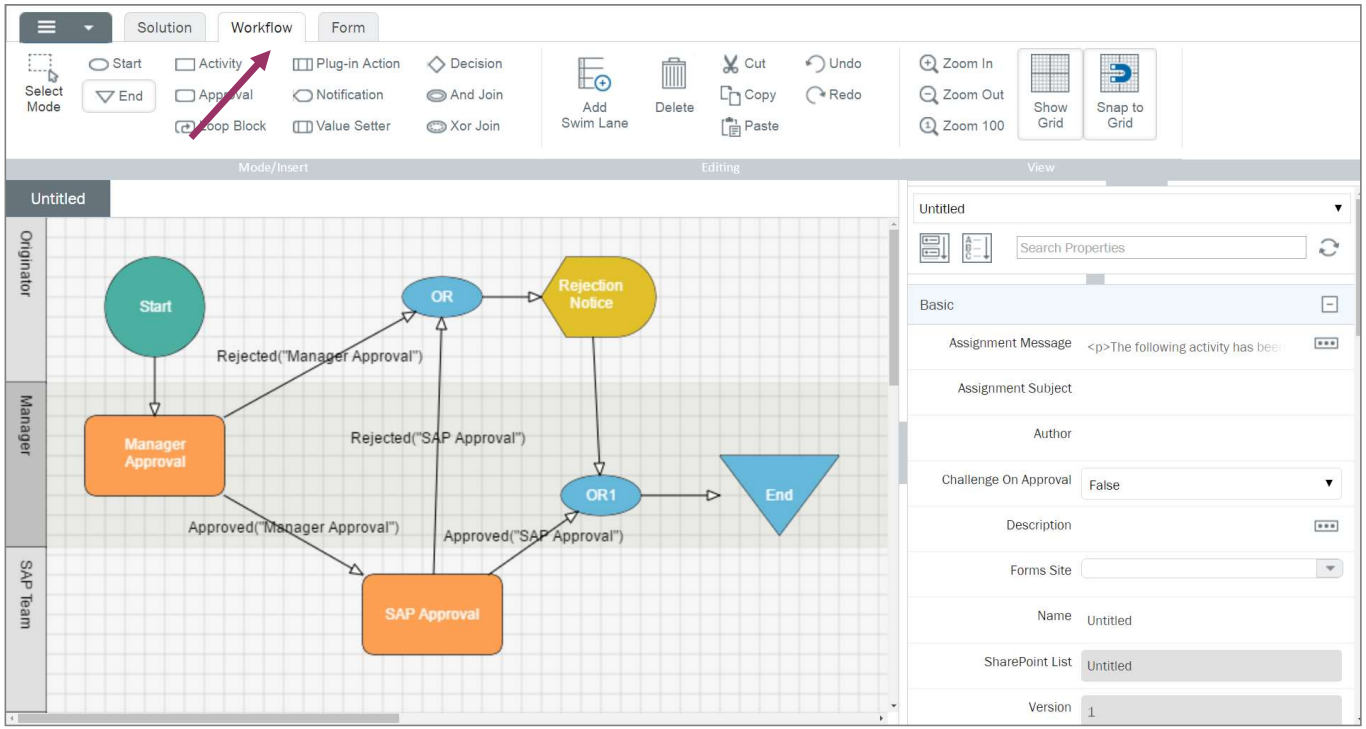
Composer

Solution Tab



Excel Workflow Introduction

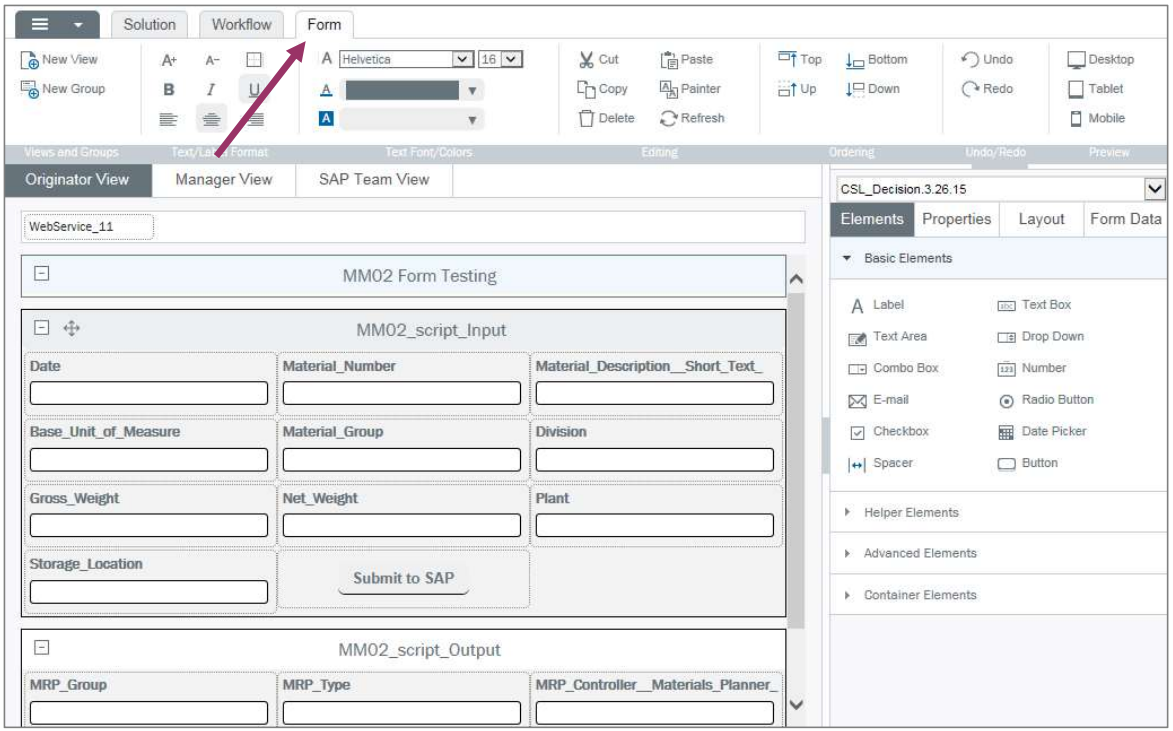
Workflow Tab



Excel Workflow Introduction

WINSHUTTLE Composer

Form Tab



Agenda

Excel Workflow Introduction

Working with the Wizard

- Create a Workflow
  - Nodes
  - Transitions

Change a Workflow

Design the Form

Deploy a Solution

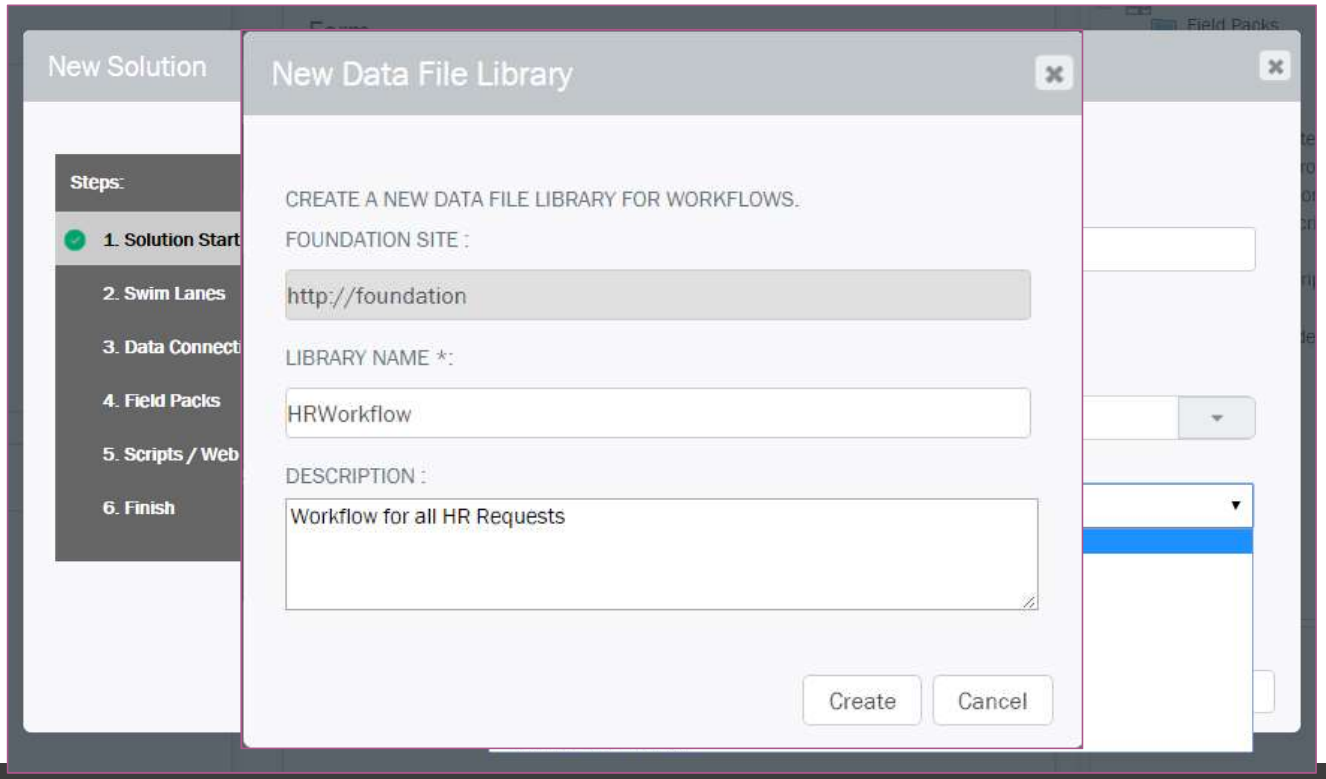
Script/Data Template Submission

How to Get Help

Working with the Wizard

Composer

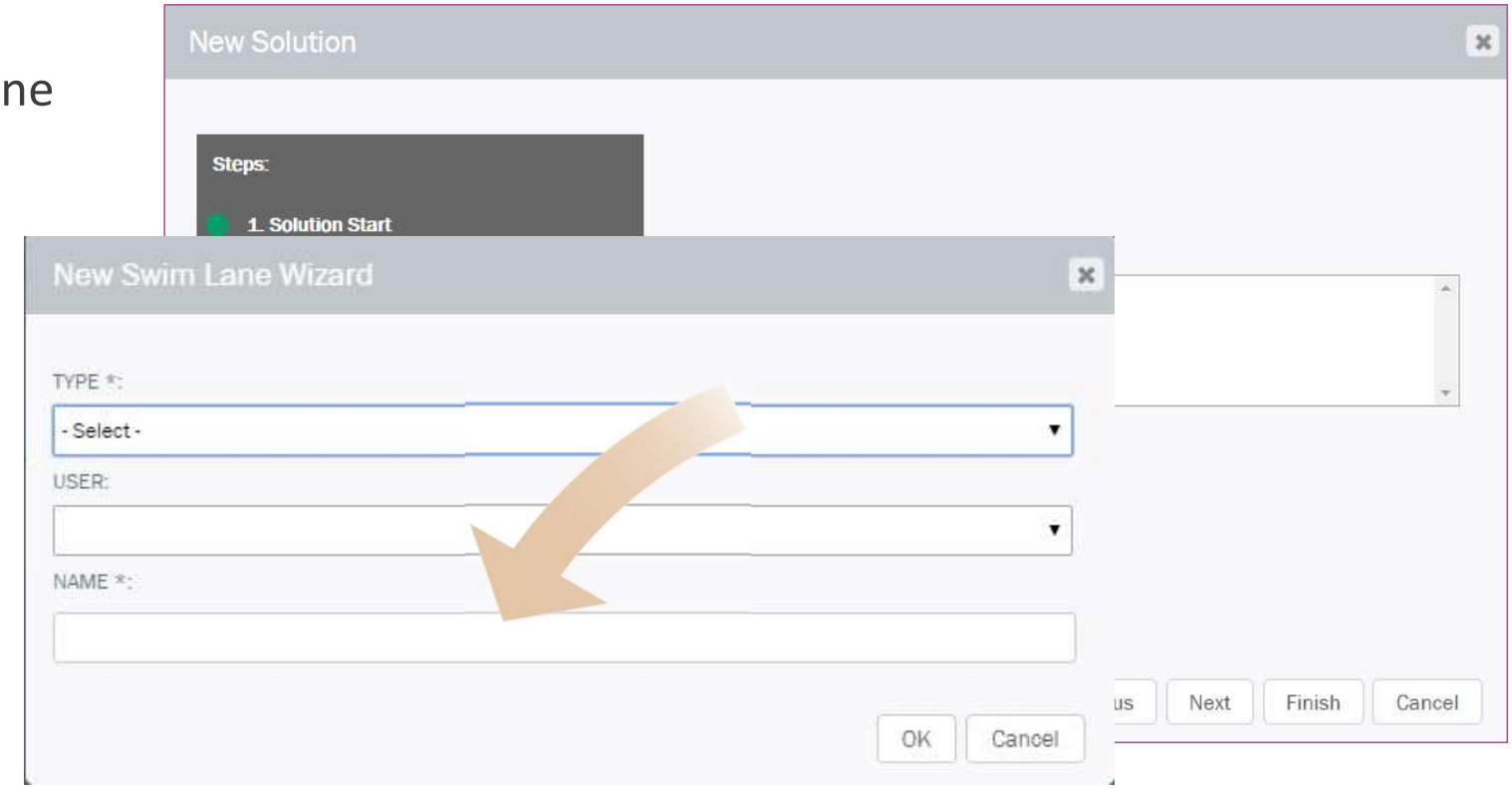
Create New Solution



Swim Lanes

Add Swim Lane

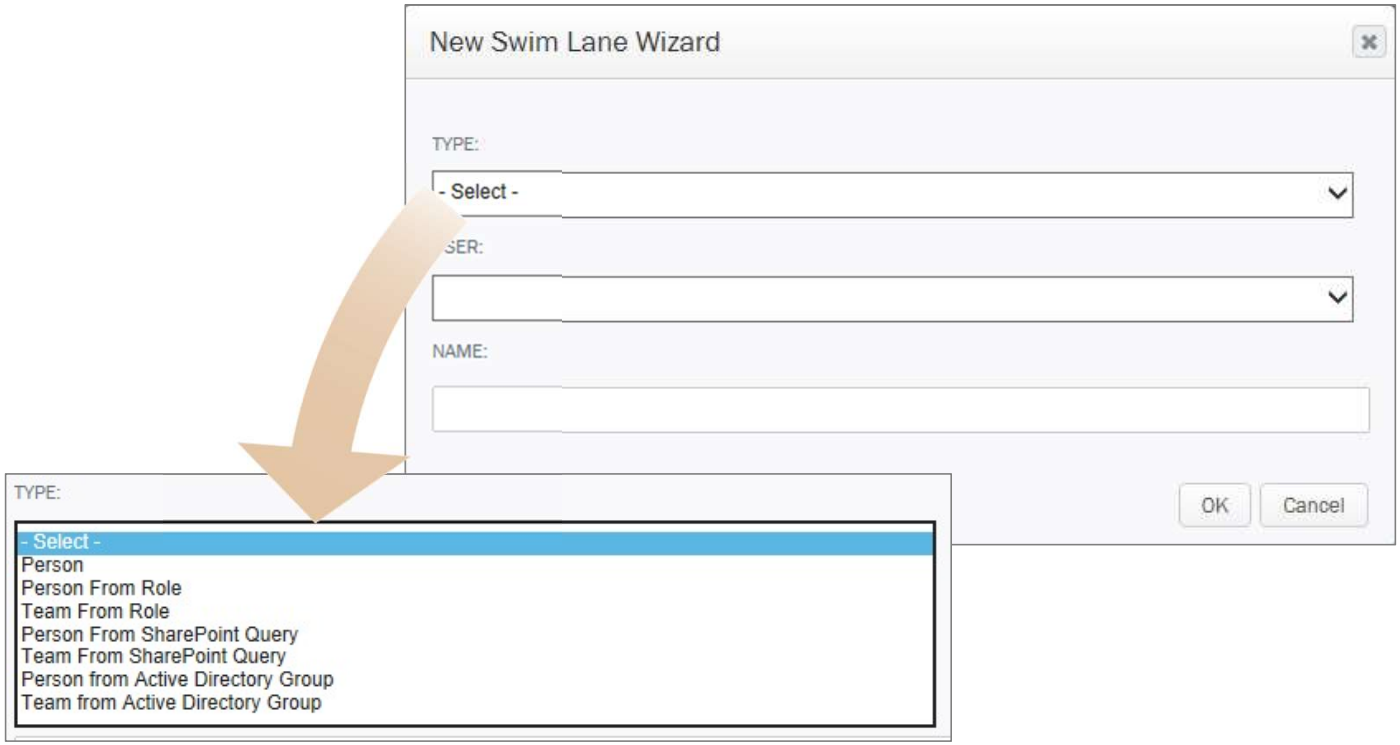
Wizard



Swim Lanes

Swimlanes

- Type



Swim Lanes

Swimlanes

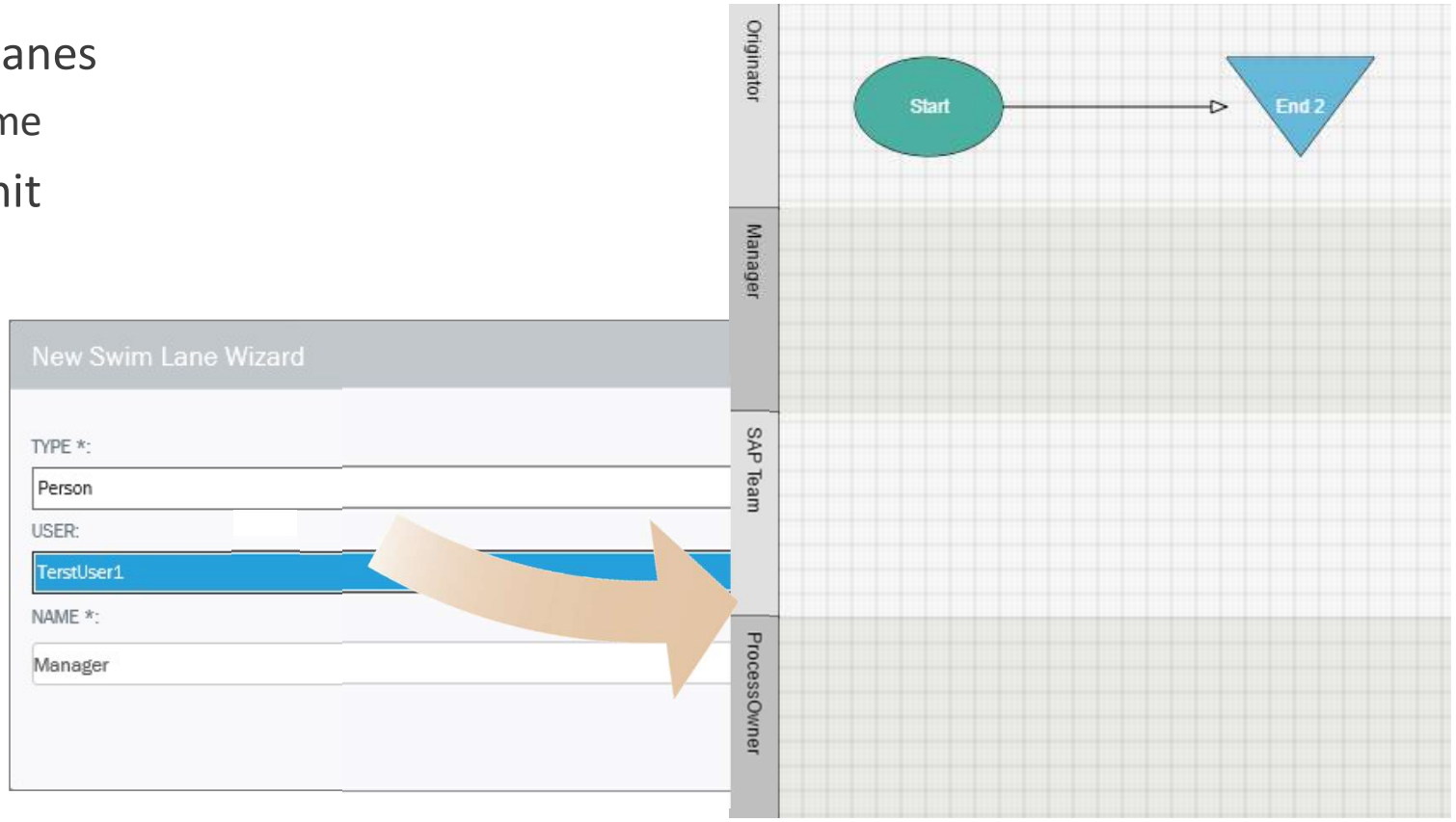
- User/Role
  - Name
  - SP Group

Swim Lanes

Swimlanes

- Name

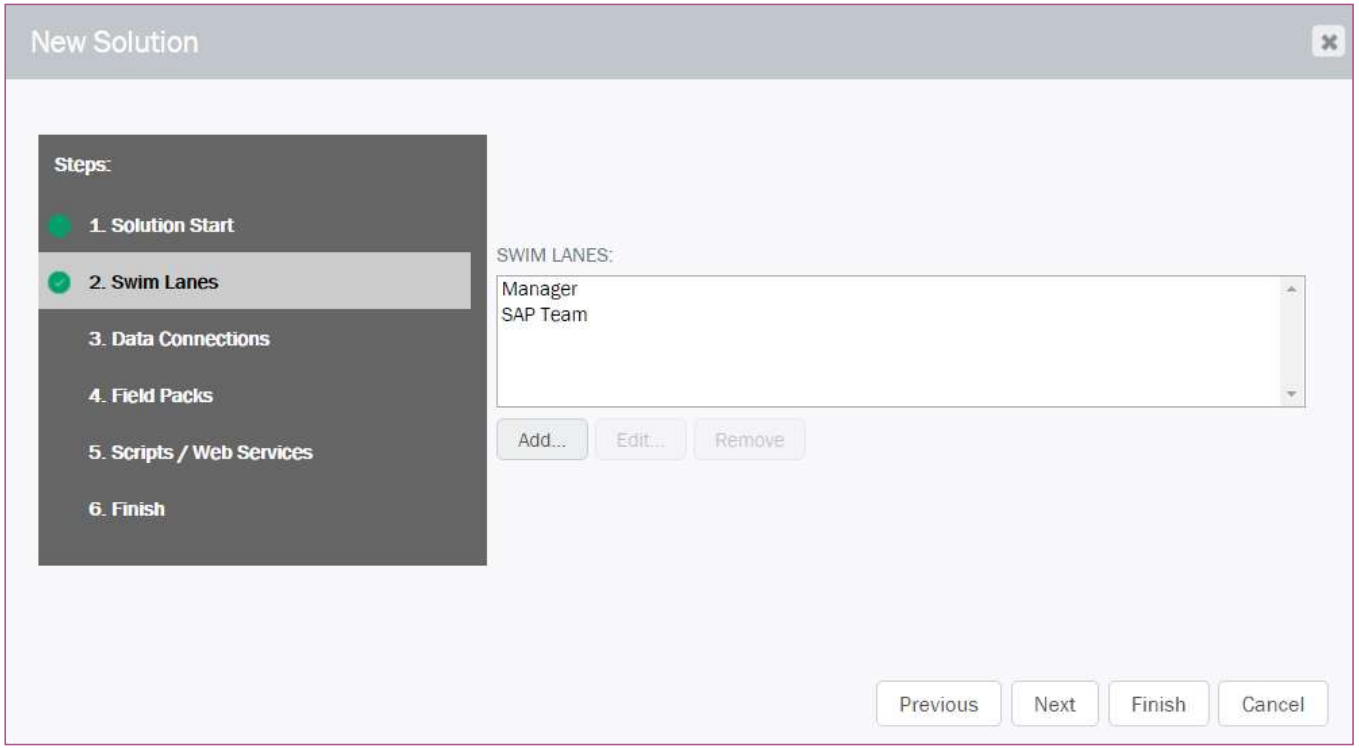
No limit



Working with the Wizard

WINSHUTTLE Composer

Finish Wizard



Agenda

WINSHUTTLE Composer

Excel Workflow Introduction

Working with the Wizard

- **Create a Workflow**
  - Nodes
  - Transitions

Change a Workflow

Design the Form

Deploy a Solution

Script/Data Template Submission

How to Get Help

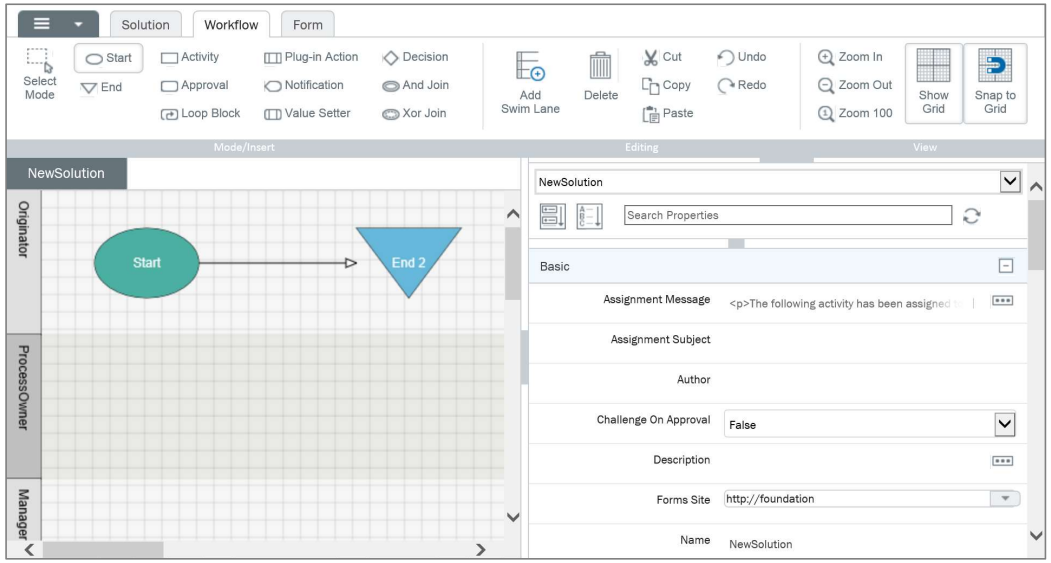
Create a Workflow

Default

Nodes

- Start
- End

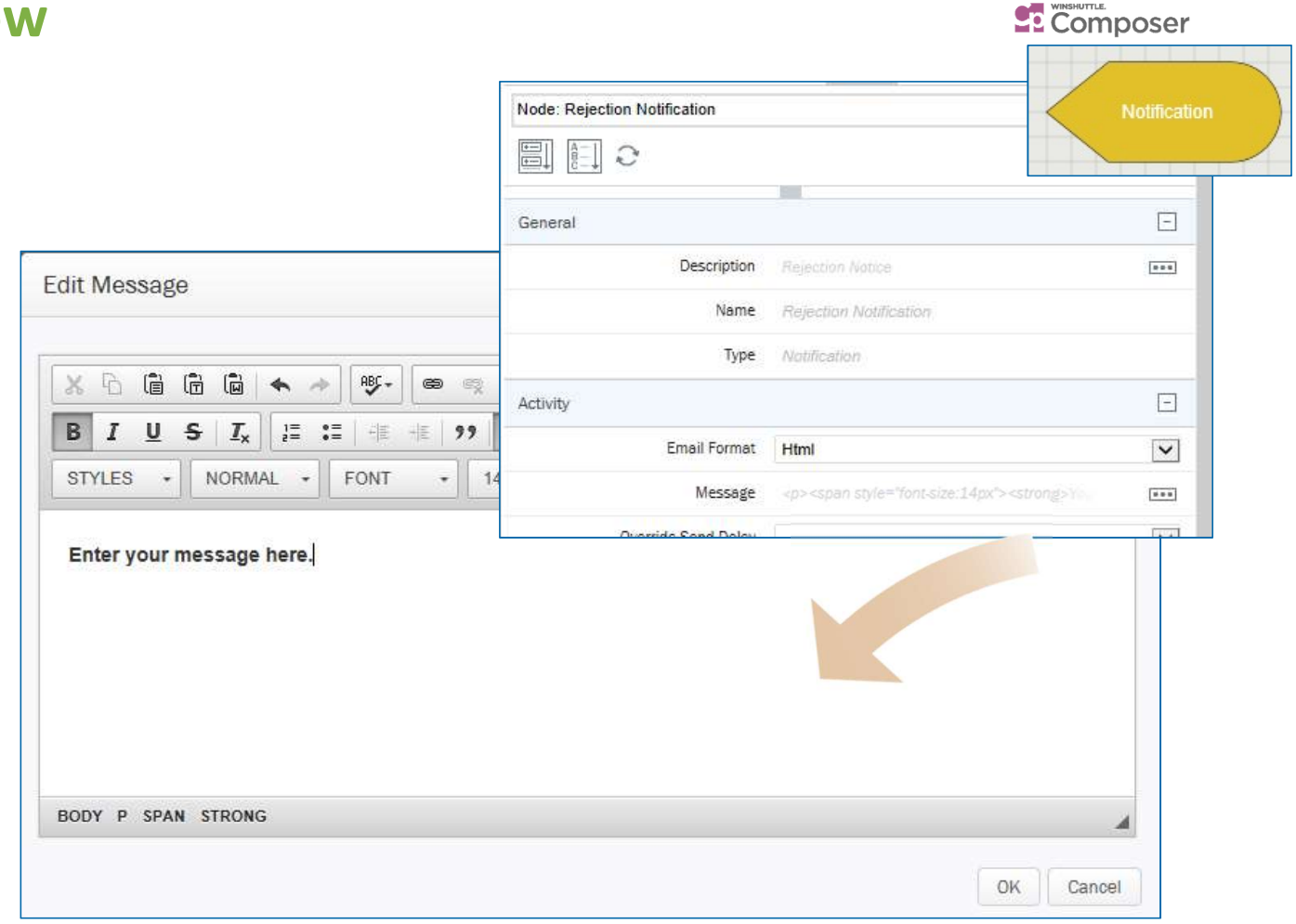
Transition



Create a Workflow

Email Notifications

- Node
- Properties Pane
- Create Message



Create a Workflow

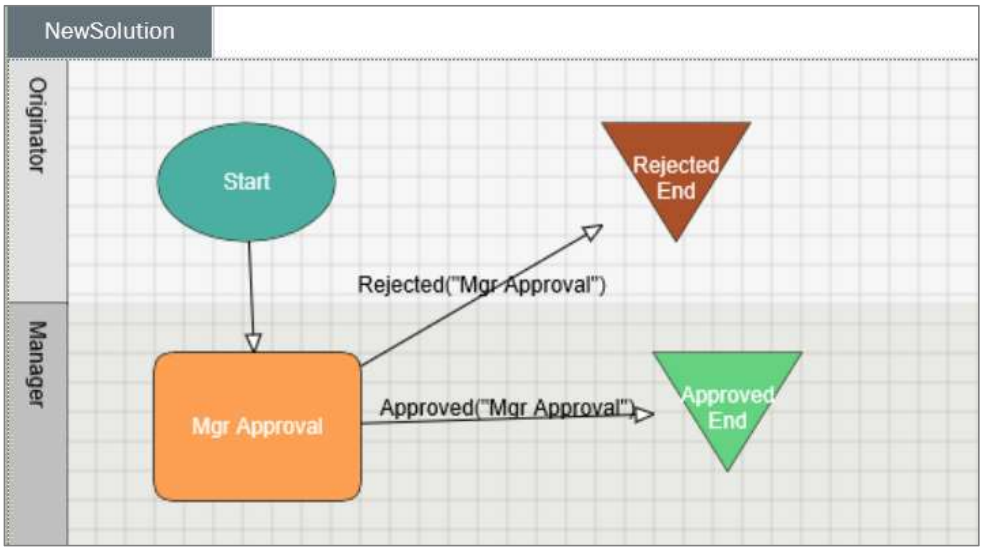
Composer

Nodes

- Approval
- End
  - Rejected
  - Approved

Transition

- Conditions



Create a Workflow

Composer

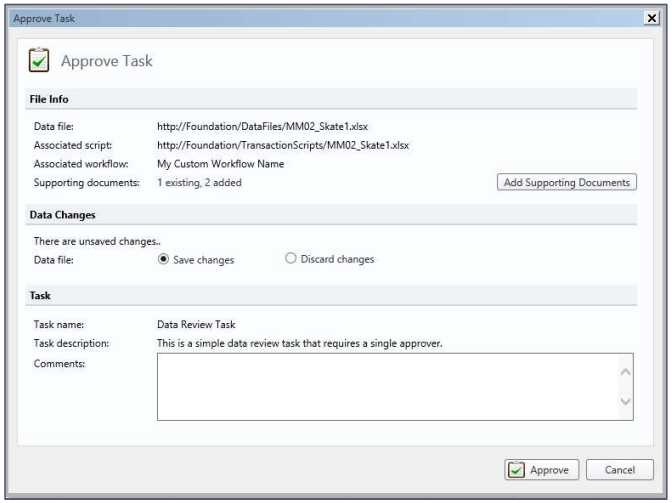
Require Review Property

- Must open file to review

Create a Workflow

Allow Replacement Property

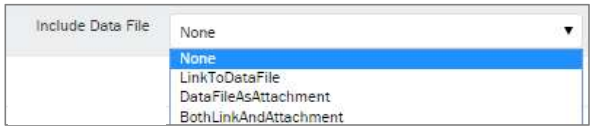
Excel Add-In

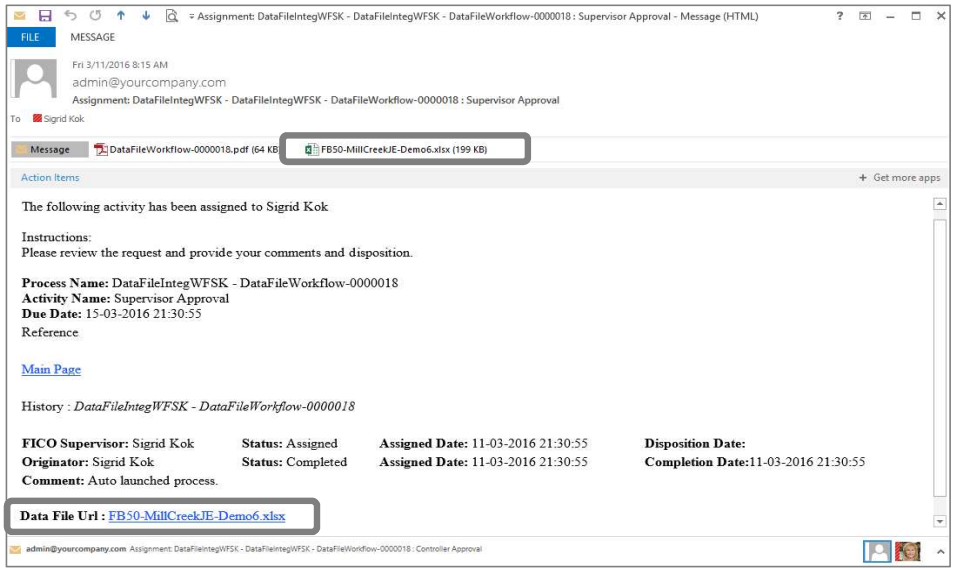


Create a Workflow

WINSHUTTLE Composer

Include Item





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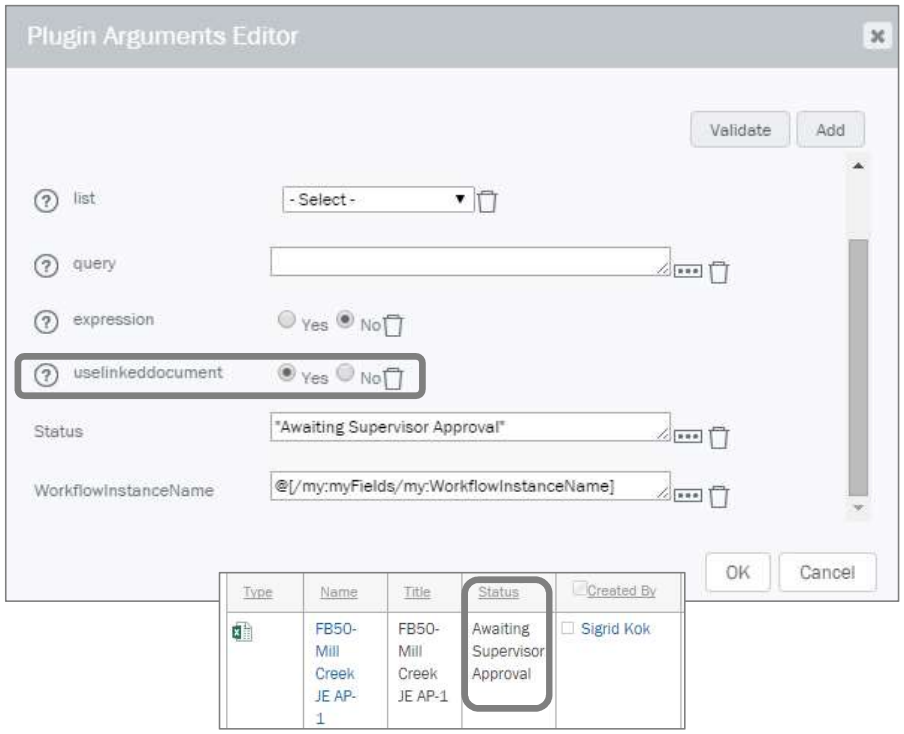
Create a Workflow

Composer

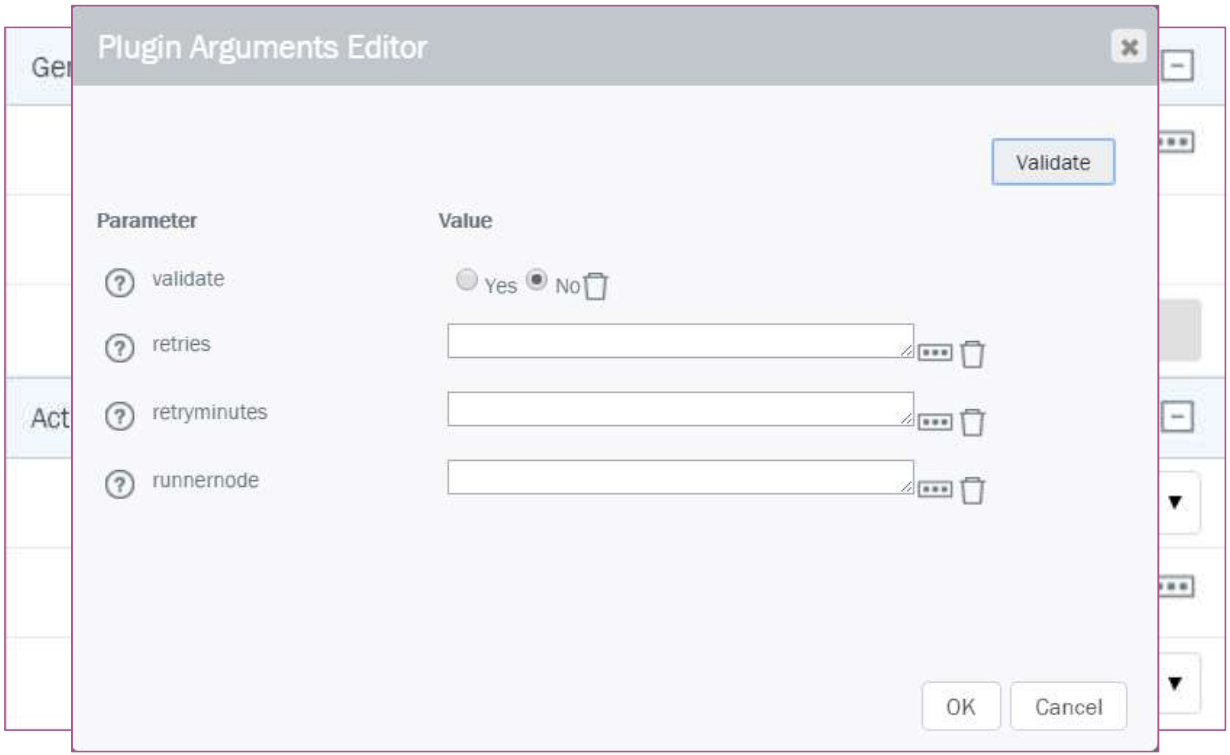
Set Column Plugin



Create a Workflow

WINSHUTTLE Composer

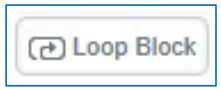
Autopost Plugin

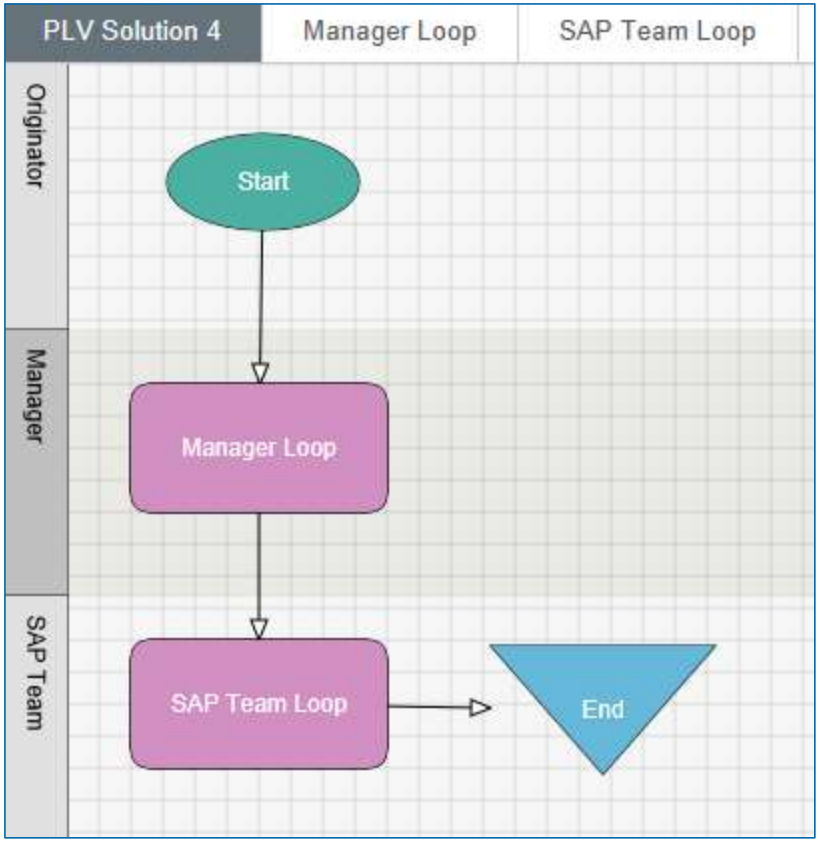


Create a Workflow

Loops

- Loop Block



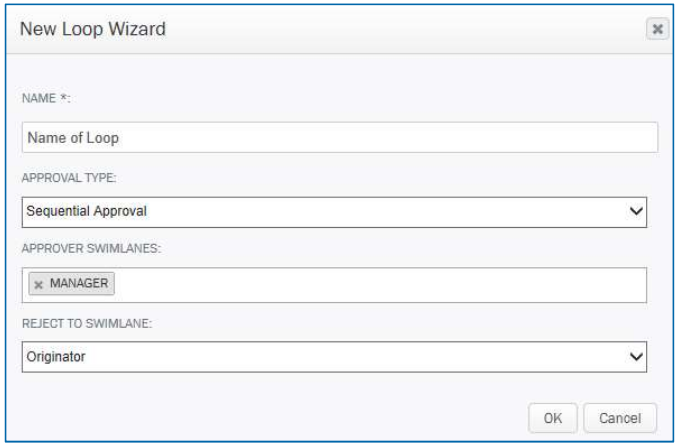


Create a Workflow

Composer

New Loop Wizard

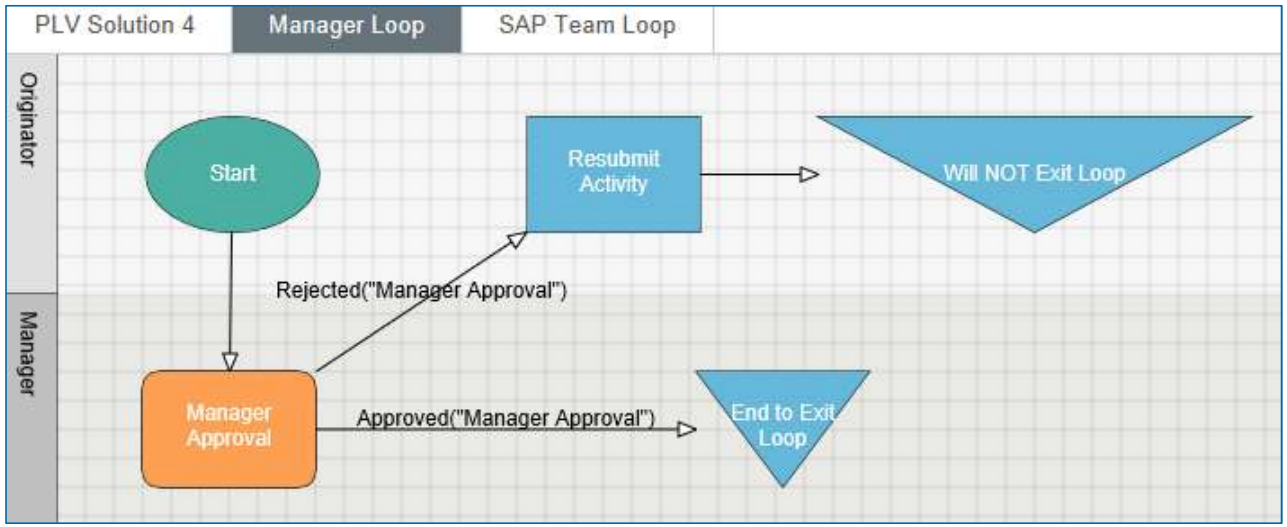
- Name
- Approval Type
- Approver Swim Lane(s)
- Reject to Swim Lane



Create a Workflow

Loops are Auto-Created

- New Canvas
- Nodes



- Transitions
  - Conditions

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Agenda

WINSHUTTLE Composer

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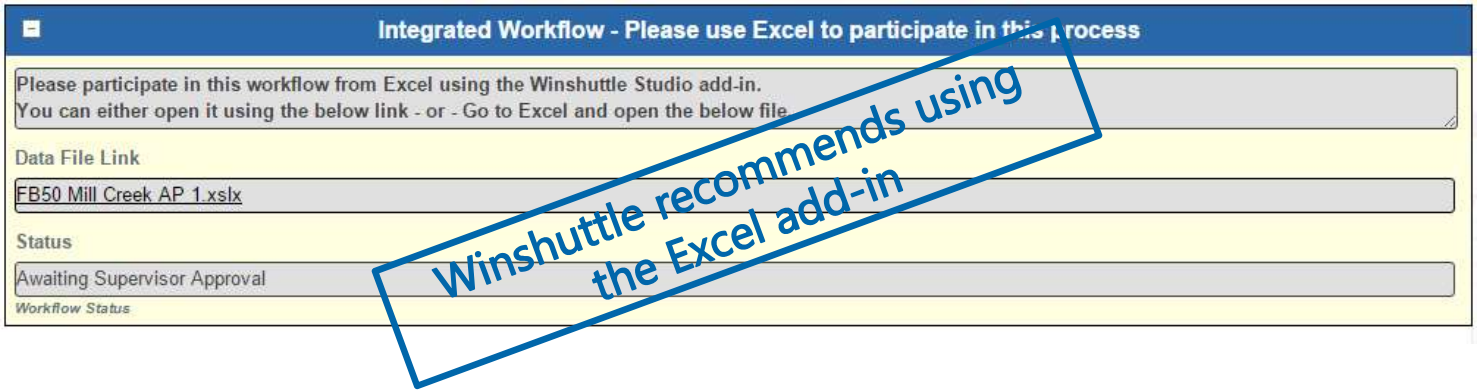
How to Get Help

Design the Form

WINSHUTTLE Composer

It exists and will publish!

- Use as a redirect to Excel

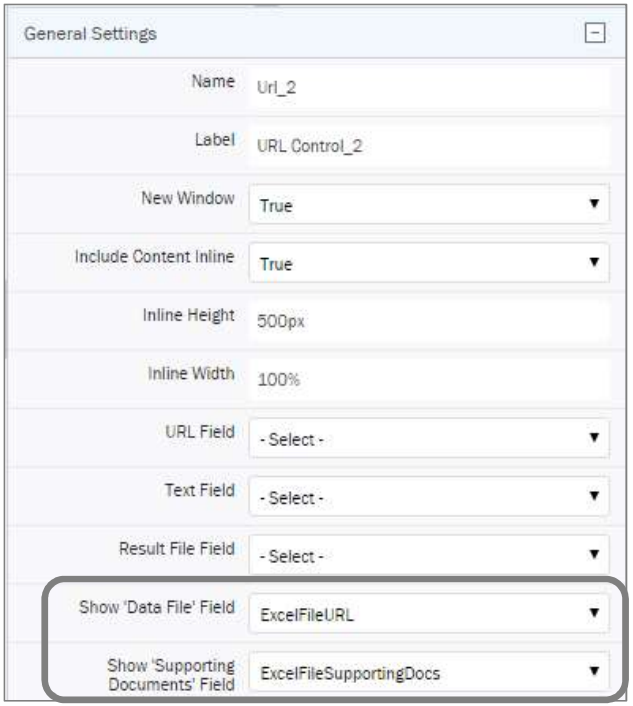


Design the Form

WINSHUTTLE Composer

URL Control (for the form)

- Add Text Fields
- Select in URL Control



Agenda

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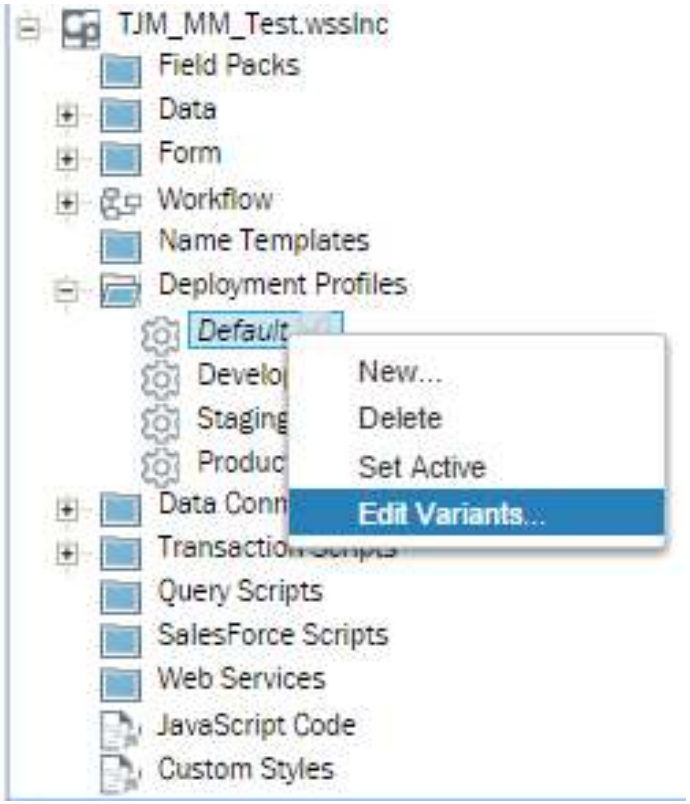
How to Get Help

Deploy a Solution

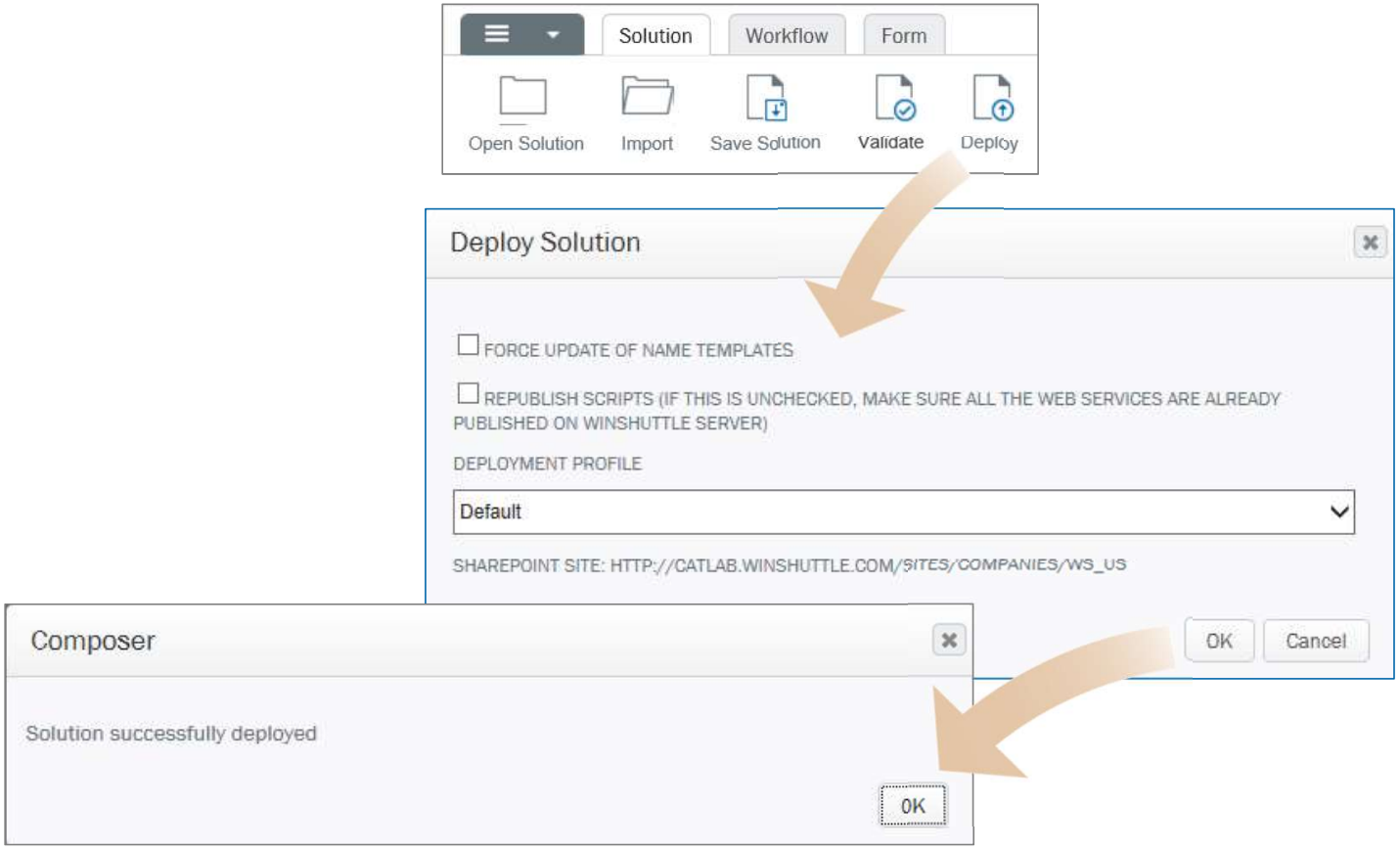
Deployment Profiles

- Default
  - Forms Site
  - User Governance Site
- Additional Profiles



Deploy a Solution

Deploy



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Excel Workflow Introduction

Working with the Wizard

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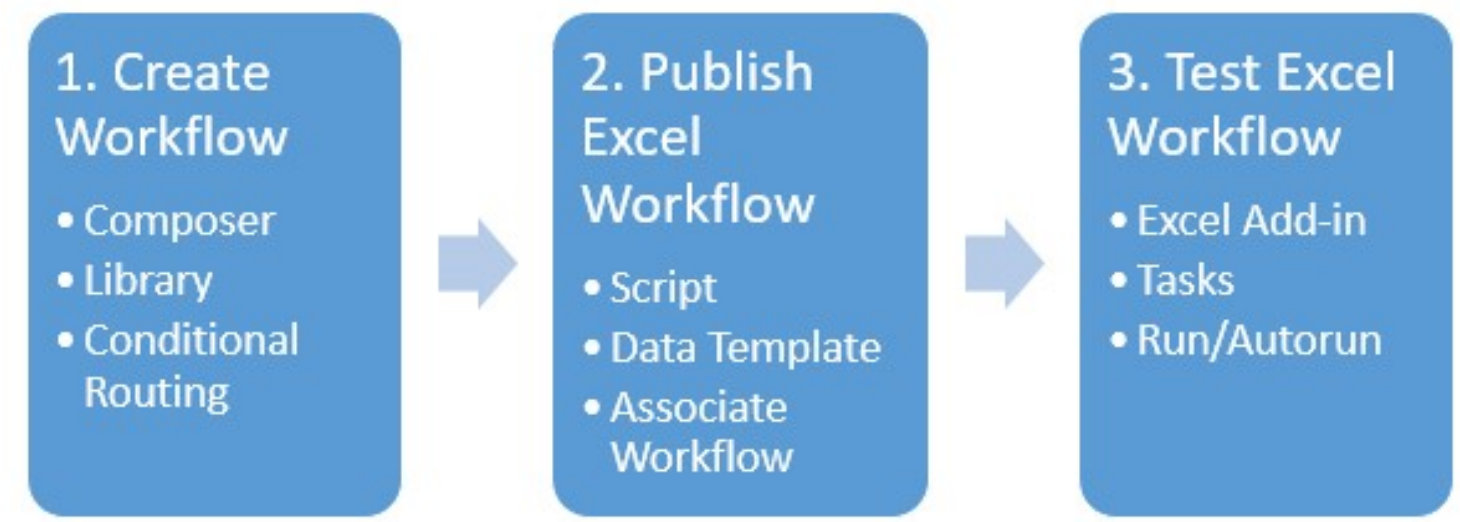
Script/Data Template Submission

- Test Workflow

How to Get Help

Excel Workflow Introduction

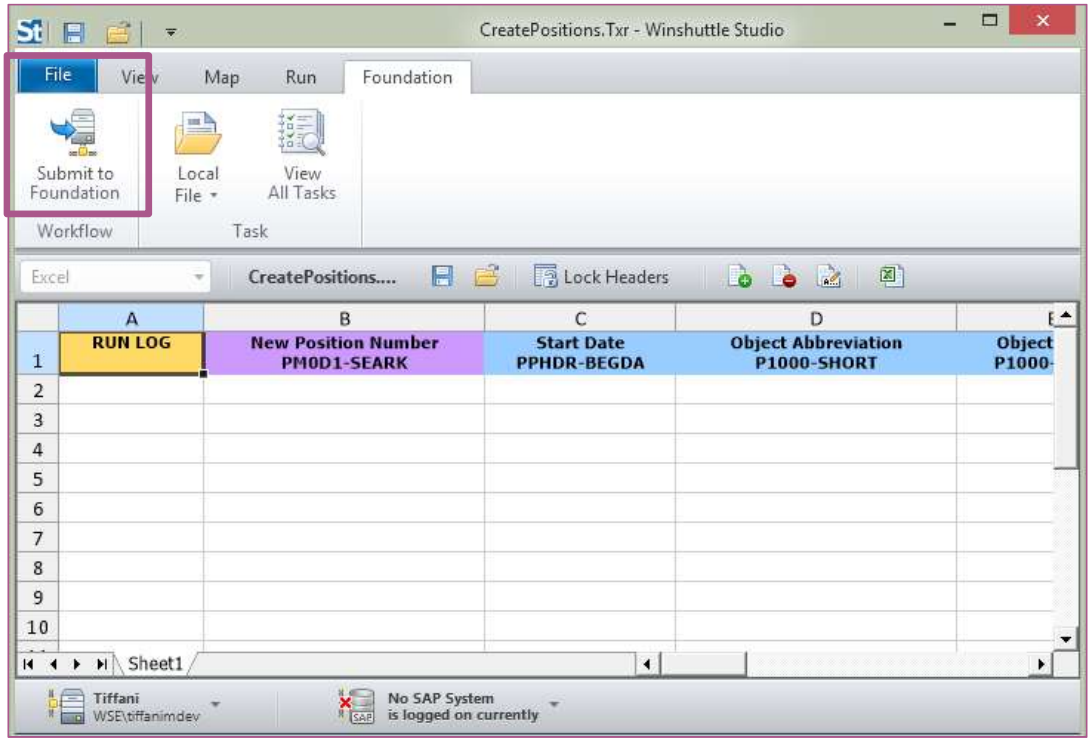
Development Process



Script/Data Template Submission

Composer

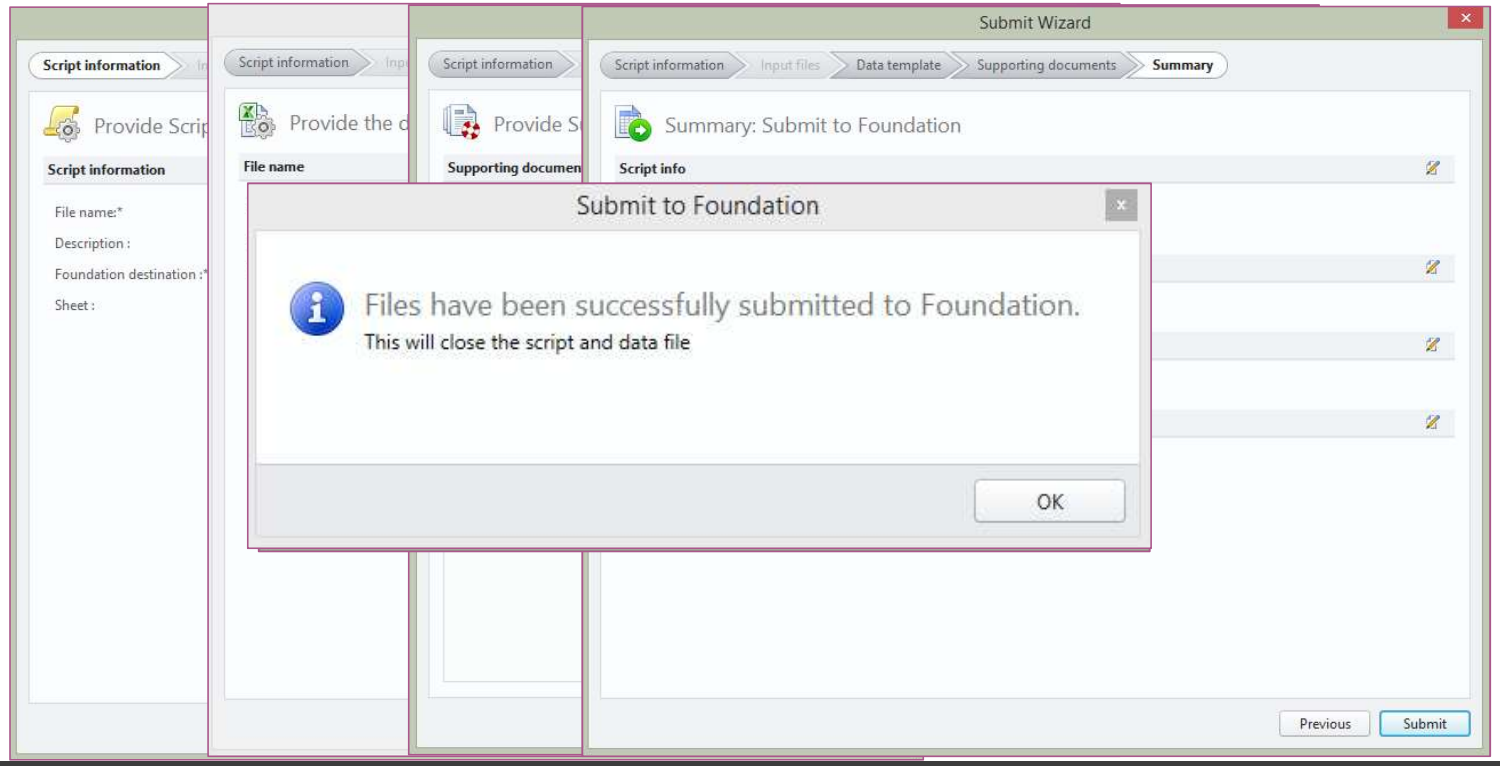
Submit Script & Template



Script/Data Template Submission

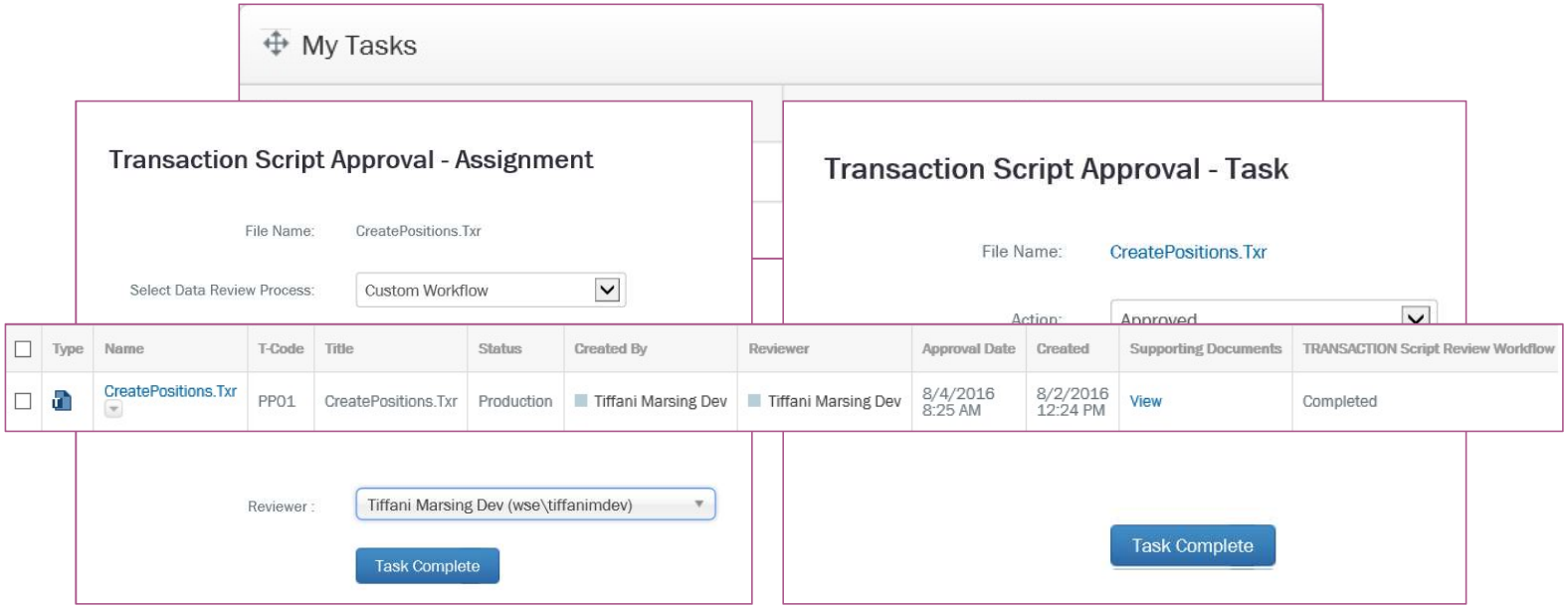
WINSHUTTLE Composer

Submit Script & Template



Script/Data Template Submission

Process Selection and Approval



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WINSHUTTLE Composer

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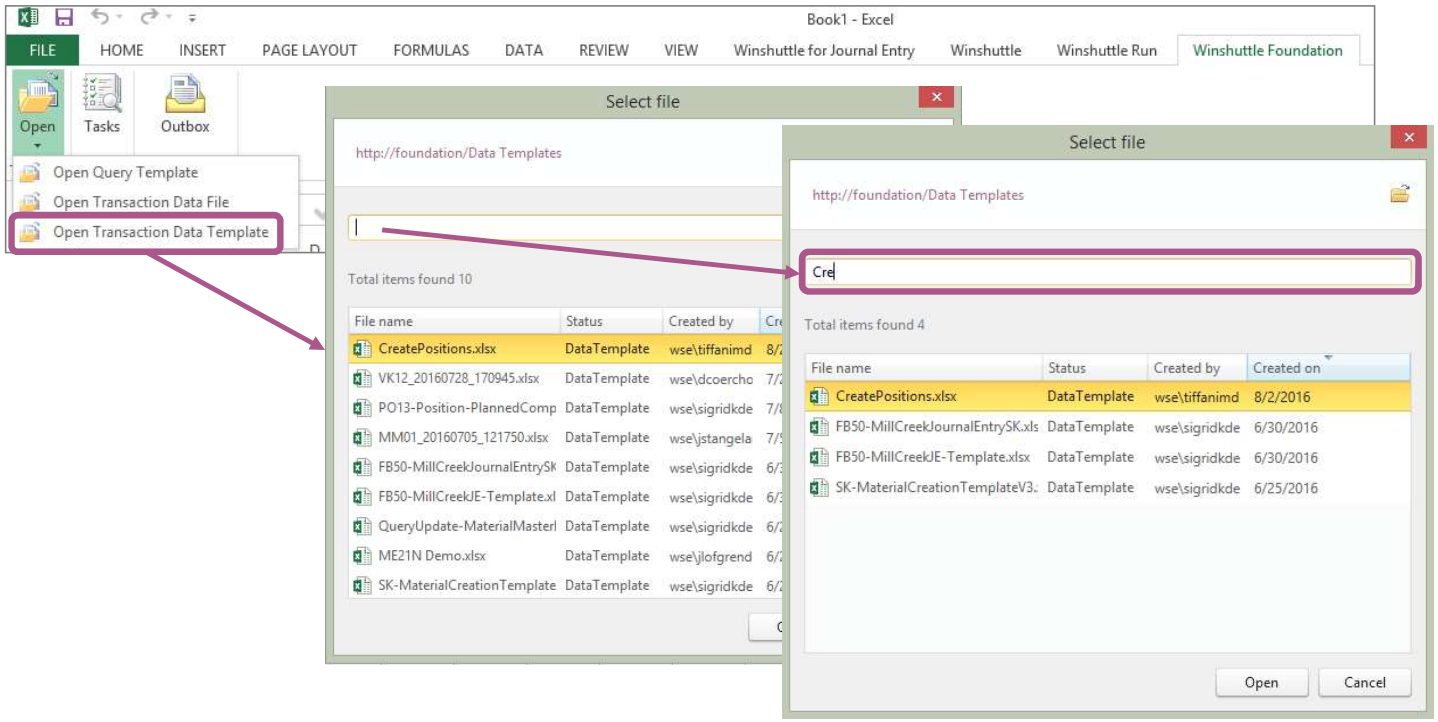
Test Workflow

How to Get Help

Test Workflow

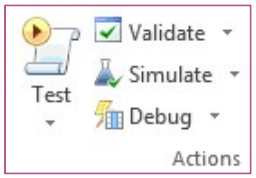
Open Template



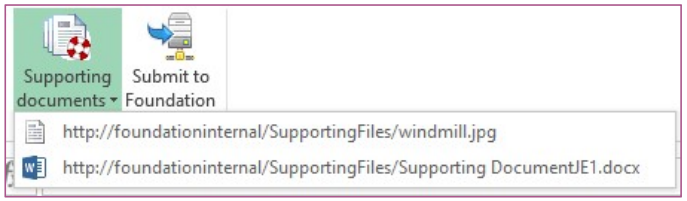
Test Workflow

Pre-submission of Data File

You can validate and simulate, as needed



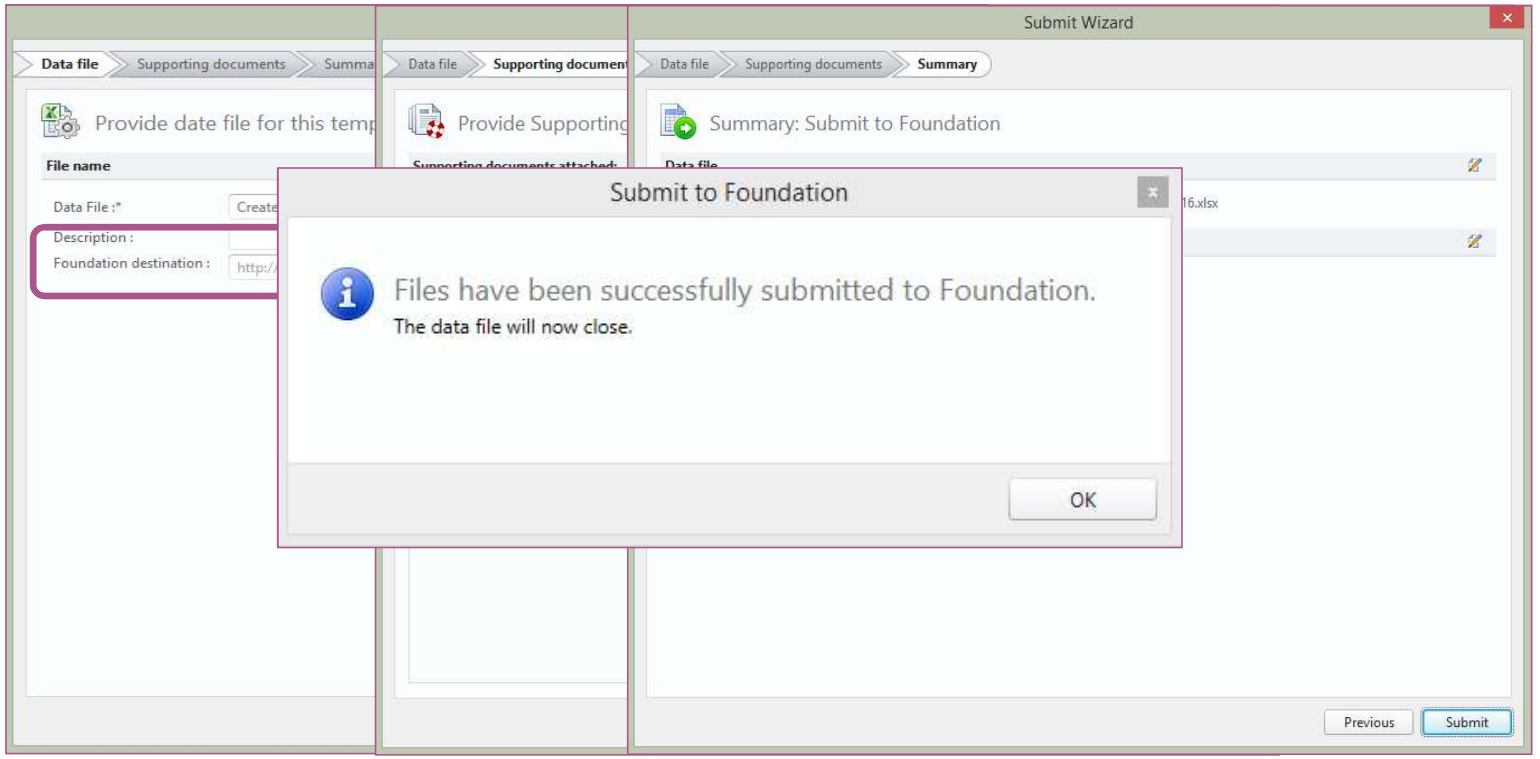
You can view the supporting documents



Test Workflow

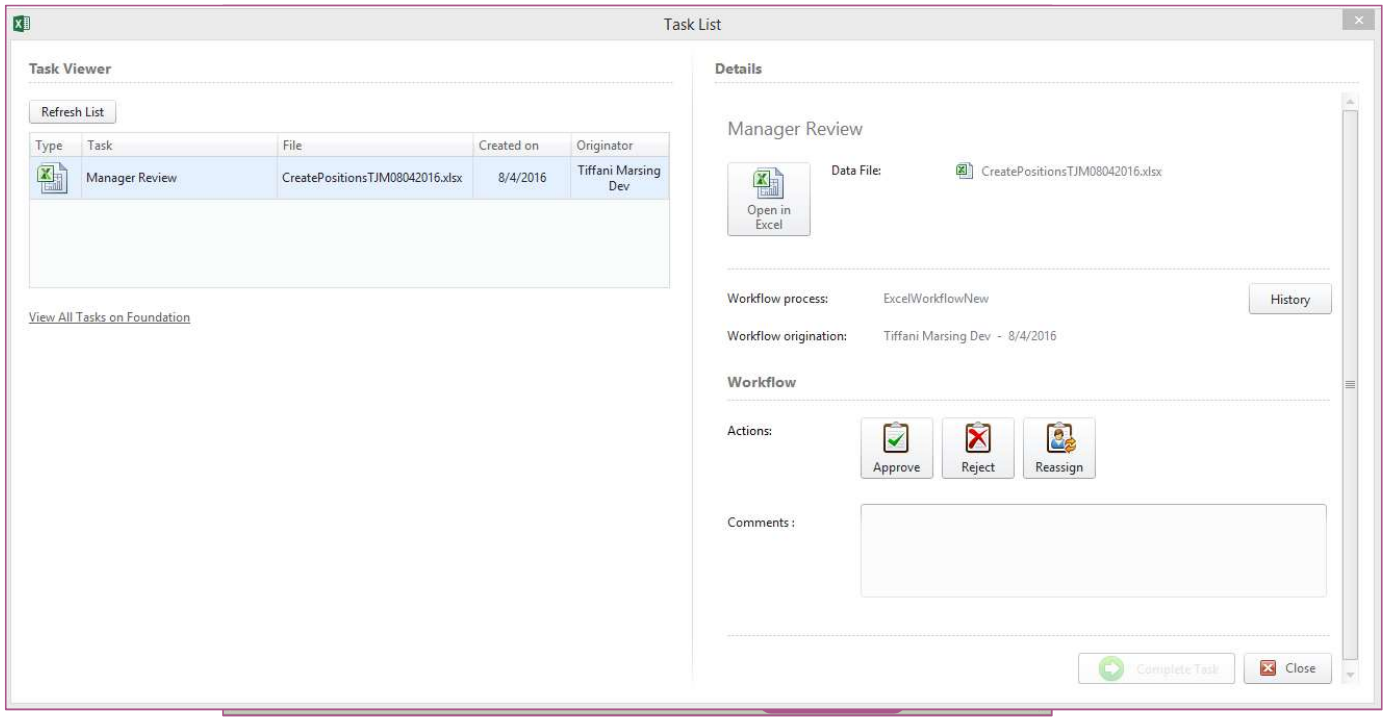
Composer

Submit Data File



Test Workflow

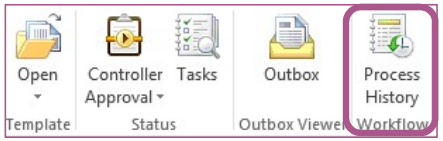
Review Required + Allow Replacement



Test Workflow

Composer

Process History from Excel



History

	Name	Creation Date	Completion Date	Type	Comments
⊟	ExcelWorkflowNew - ExcelWorkflowNew 8/4/2016 11:07:14 AM	8/4/2016 11:07:17 AM	8/4/2016 11:43:25 AM	Pre-Defined	

Assignments

Assignee	Task Name	Assigned Date	Review Date	Completion Date	Comments	Status
Tiffani Marsing Dev	Start	8/4/2016 11:07:17 AM		8/4/2016 11:07:17 AM	Auto launched process.	Completed
Tiffani Marsing Dev	Manager Review	8/4/2016 11:07:18 AM		8/4/2016 11:43:25 AM		Approved

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Hands On Practice
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Navigation for Practice

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Username: Your email address

Password: Training1

1. Click Current Learning
2. Click session title Excel Workflow
3. Select item to practice (wait a few seconds for it to load)
4. Click Standard Tutorial

Topic 1

Create Workflow

This simulation walks you through the steps to create and publish a workflow in Composer to route an Excel template.

Topic 2

Associate Data Template and Workflow

This simulation walks you through submitting your script and data template to Foundation, associating it with a custom workflow.

Topic 3

Test Workflow

This simulation walks you through testing your published Excel workflow with a sample data file.

Agenda

WINSHUTTLE Composer

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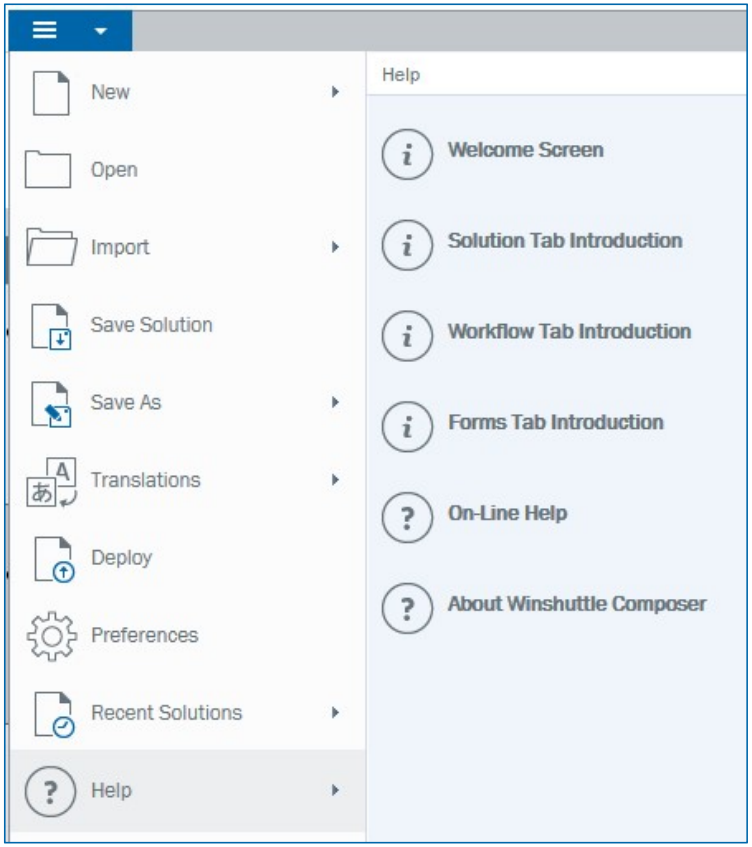
How to Get Help

How to Get Help

Help

- Welcome Screen
- Solution Introduction
- Workflow Introduction
- Forms Introduction
- Online Help
- About Composer



How to Get Help

Website

https://support.winshuttle.com

Knowledgebase

Create Support Tickets

Click ‘Submit A Request’

Complete the form > Click ‘Submit’

Email confirmation

Email: Support@Winshuttle.com

How to Get Help

Phone:

US: +1 (800) 711-9798

UK: +44 (0) 208 879 5400

FR: +33 (1) 85 34 18 65

DE: +49 89 4445802-0

IN: +91 40 49400811

Questions?

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Other Resources

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2. Click ses Current Learning
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4. Click Standard Tutorial

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