

QUICK START

Workbox v 1.7.7.272

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Workbox is still expanding. While its base functionality is fully tested and stable, we are constantly adding new functionalities with each release. We strongly recommend you to register on <http://partner.datapolis.com.pl>, where you will be able to easily track latest Workbox releases. Also, you will be able to get additional Workbox materials and to try our on-line demonstration environment with latest version of Workbox.

If you experience any problems with Workbox, either during installation or when using it, please contact us at <http://www.datapolis.com/en/support>.

If you are a developer, you can start creating your own activities and functions. Download Workbox SDK at <http://www.datapolis.com/en/Offer/Products/WorkBox/Pages/SDK.aspx>

If you are interested in purchasing a license, see our licensing and pricing information at <http://www.datapolis.com/en/Offer/Products/WorkBox/Pages/SaleInfo.aspx>

Thank You for Choosing Workbox

We hope that you will find our product useful. If you have any comments or questions regarding Workbox or this guide, please feel free to contact us. Contact details are included in *Troubleshooting* section of this document. We will gladly help you solve any issues.

Please find some time to read this document, which will guide you through Workbox's functionalities and show you how to use them fully.

Setup configures a fully functional solution. By default, a 30-day Trial version is installed, this time constraint being the only limitation. In order to use Workbox after 30 days, you need to purchase and install a license.

When you have installed the Trial version of Workbox and you want to continue using it after the trial period, you don't have to reinstall or reconfigure anything. It is sufficient to purchase and activate either the Standard, Enterprise or Unlimited license.

Please note that when you activate Standard license, which has limit to 5 workflows deployed concurrently, you will need to redeploy the workflows which you want to use, otherwise the workflows will not start.

More about licensing can be found in the Setup Guide in the *Licensing* chapter. The Setup Guide can be found in the same folder as this document.

If you encounter any problems while using our product, please refer to the instructions included in [Troubleshooting](#) section.

1 Introduction

1.1 What is Workbox?

Workbox is an advanced platform designed for creating and managing business processes. It is a practical tool for defining simple document flows, such as flow of invoices, absences, sick leaves or business trips, as well as modeling complex business processes based on company's IT systems.

1.2 Who is a Workbox user?

Workbox has been designed for managers and business analysts who create business processes within a company. Using Workbox does not require programming skills, though the user should have at least basic knowledge of Windows SharePoint Services 3.0 and/or SharePoint Server 2007.

1.3 See the Tutorials

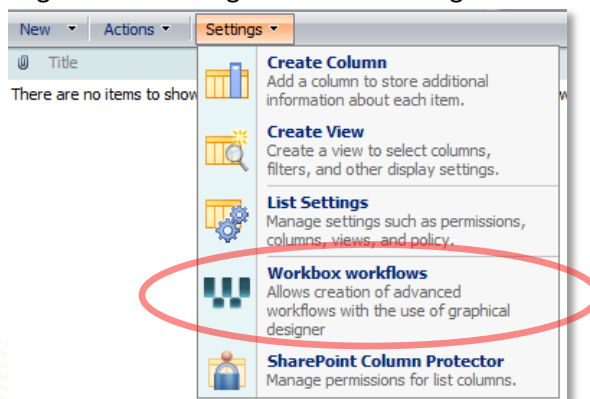
Please view the tutorials available on our web site www.datapolis.com. These tutorials will show you how to use Workbox in order to create both simple and advanced workflows.

2 Start Creating Workflows!

2.1 Create a Workflow

Creating workflows with Workbox is an easy task. Workflows can be created on SharePoint lists and document libraries. Any user with permissions to manage a list can quickly build and run a workflow.

When Workbox is installed on a SharePoint farm, a new position in the list settings menu appears: **Workbox workflows**, allowing users to manage workflows on a given list.

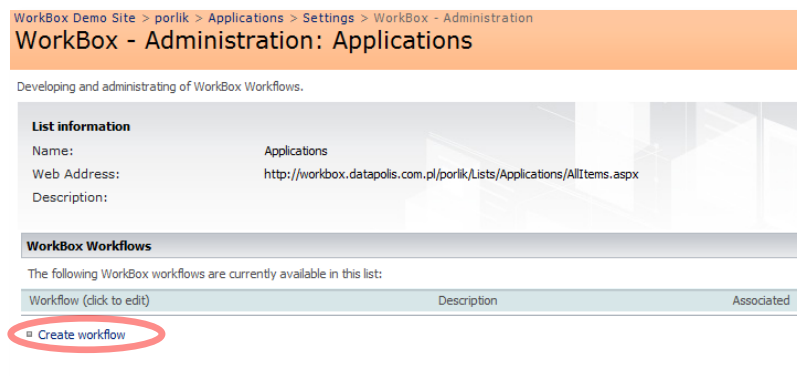


Note: More than one workflow can be defined for a given list. All of the workflows can be launched simultaneously.

Note: Standard workflows can still be run on a list where Workbox workflows are present. Please also note that, when referring to workflows or workflow management in this document, Workbox workflows and functionalities are meant, unless stated otherwise.

Workbox Workflow Management site provides a list of workflows currently defined on a given SharePoint list.

To create a new workflow, click the **Create Workflow** link. After providing a name, graphical workflow designer will open.



Note: Workflow names must be unique within a site.

2.2 Designer

Workbox Designer is a tool for creating workflows, where you can set up the whole process, along with a number of various conditions, permissions, automated tasks and other elements. Then you can deploy it on your list, where it will be run.

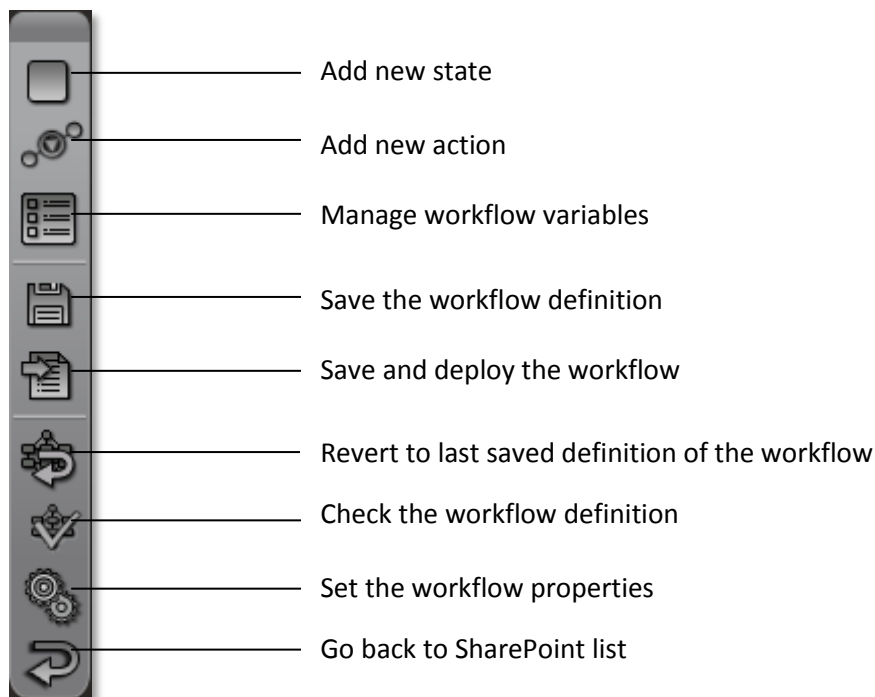
While workflow definitions are rather simple, they reflect real processes, however complex they may seem from the outside.

The person who designs a process has to learn basic terminology: **state**, **action**, **activity** and **permission**.

Each process has to start and end somewhere – these are the entry points and exit points, respectively. They are represented as a green (start) and red (end) circles on the diagram. Other workflow elements are: states, actions (transition from state to state), activities (operations which are to be performed by the system when making a transition between states) and permissions.

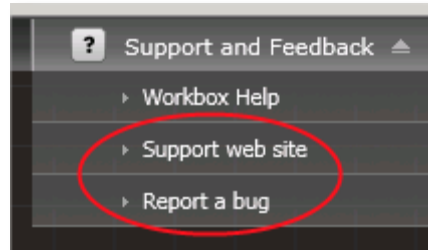
When entering Workbox Designer for the first time, you see a plane, empty but a starting and ending points of the process.

On the left side of the screen is also a toolbar with a set of options used to build the process and manage its properties:



In the top-left corner of the screen is a role toolbar, where you can define new roles to be used in the process and manage existing ones.

On the top-right side of the screen is a drop-down menu with support options:



Note: Click the “Support web site” to go to the Datapolis support page, where you can request online training, find all known errors or ask Workbox developers a question. Use “Report a bug” option if you encounter a problem with Workbox. It will help us improve our product. “Workbox help” opens the help window.

2.2.1 Adding States

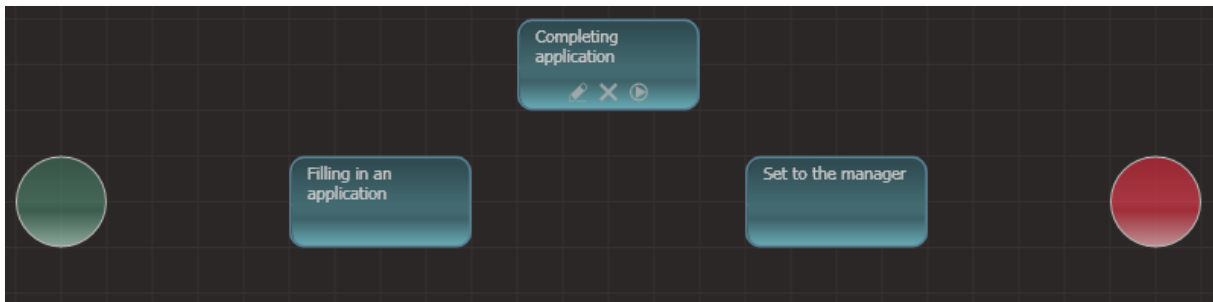
States are a logical representation of each phase of a process. It is important to understand that a state defines a general situation in which an object (be it a document or a list item), on which workflow is running, could be placed. For example, a vacation request document could be either approved or rejected, so two phases – and, in effect, workflow states – of the vacation request workflow could be “Request approved” and “Request rejected”.

To define a new state in the workflow, click the “Add new state” icon in the toolbar. When you point your mouse cursor on a free space of the design area, an outline of a rectangle will be displayed. Click again in a place where the state should be created.

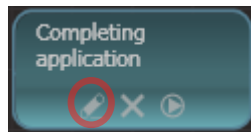
Example:

Let us assume that a process of submitting an application will consist of three phases: **Filling in an Application**, **Sent to the manager** and **Completing Application**.

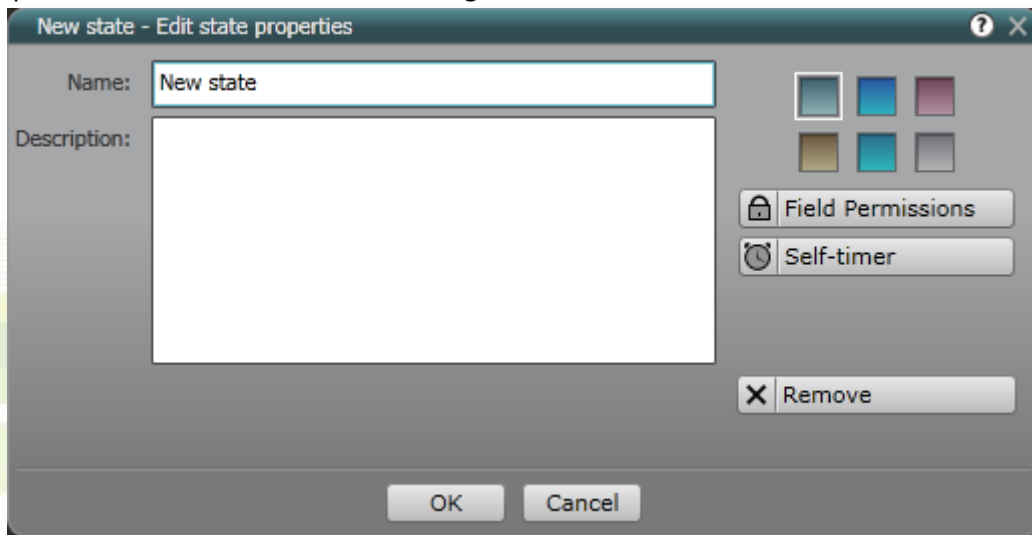
When the process is starting, a person who submits an application should fill in a proper form. State: "Filling in an application". Next, the form needs to have a manager's acceptance (State: "Sent to the manager"). Now comes the phase when an application can be accepted, denied or transmitted to complete it (State: "Completing Application").



When we create a new state, it has a default name of a "New state". In order to change it, we have to edit the state properties. Either double-click on the state or click a small pencil icon which will appear when you point mouse cursor over the state. The other icons are to remove the state and create a new action.



State properties window looks like the following:



Here we can do the following:

- Name the state and add its description.
- Change a color of the state. This will make the diagram more readable, especially when it's complex.

- Assign permissions to item fields. This allows you to control who should be able to read and edit each column on a list when a process is in a given state.
- Set up self-timers, which allow automating parts of a process and can perform recurring tasks.
- Remove the state from the definition (works the same way as aforementioned “Delete state” icon).

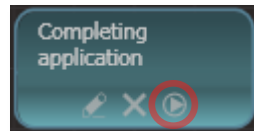
2.2.2 Adding Actions

Actions represent transitions between states. On the workspace actions are shown as lines connecting connect two states.

Actions are launched by users, thus pushing the process forward, along defined path.

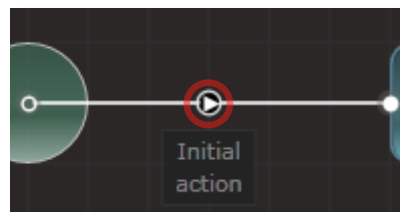
Actions can be created in two ways:

- By clicking the “Add new action” icon in the toolbar.
- By clicking the “Add new action” icon displayed on a state.



A small icon will appear next to the mouse cursor. When you move the cursor over a state, a number of connection points will appear. Click one of these and, holding the mouse button, move the cursor to the next state, where you can release the mouse button over the target state’s connection point.

Note: Because action represents transition between states, its direction is important. The direction is marked by a small arrow in a circle:



In other words, it is important that, when creating actions, you begin in a state from which the action should start, and end in a state to which the action should lead.

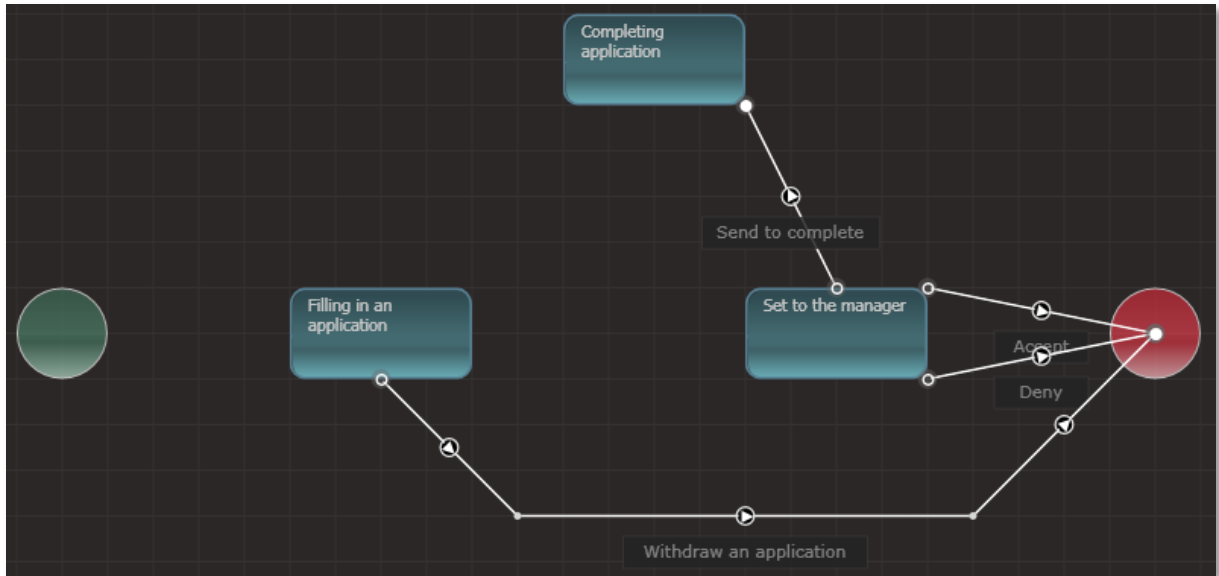
Note: The action coming from the starting point (the “Start” state) is a special action which is always executed when workflow starts. Its standard name is “Initial action” and has disabled permission, execution conditions and launch form management (these functionalities are described later in this document).

Action lines can be bent, giving you a degree of control over how the action should be shown in the diagram. To bend an action line, click it in a desired place, then, holding the left mouse button, drag the bending point to a new place. It is useful when you want to keep you workflow diagram readable.

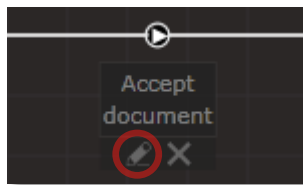
Example:

For the state “Sent to the manager” we can define several actions: *Accept*, *Deny*, *Send to complete*, *Withdraw an application*.

Launching *Accept*, *Deny* or *Withdraw an application* action ends the process, while launching the *Send to complete* action causes transition to “Completing application” state.

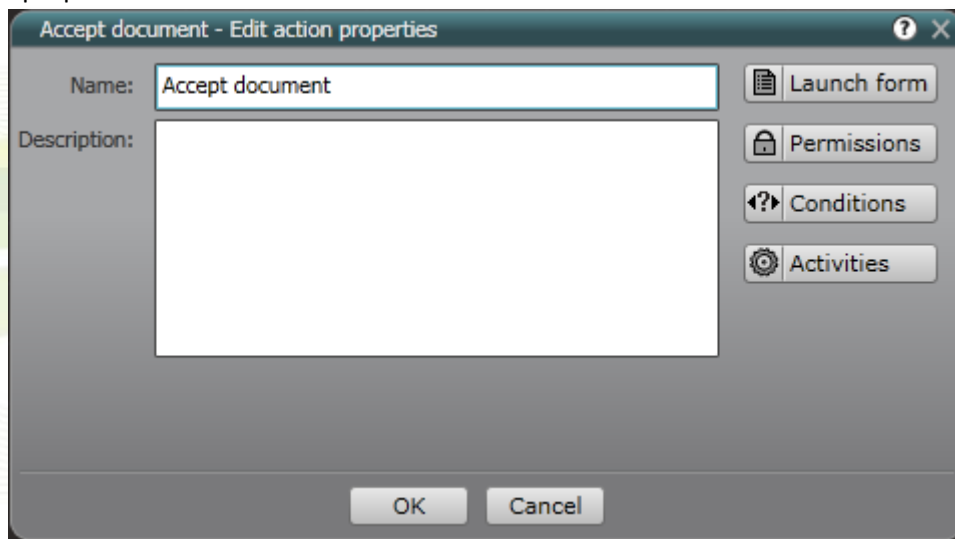


As was the case with states, you can edit action properties. You can open the properties window by double-clicking the action line or by clicking the “Edit action” icon, which appears when you point the mouse cursor over the action:



There is also one other icon (“Delete action”) which you can use to remove the action from the diagram.

The action properties window looks like this:



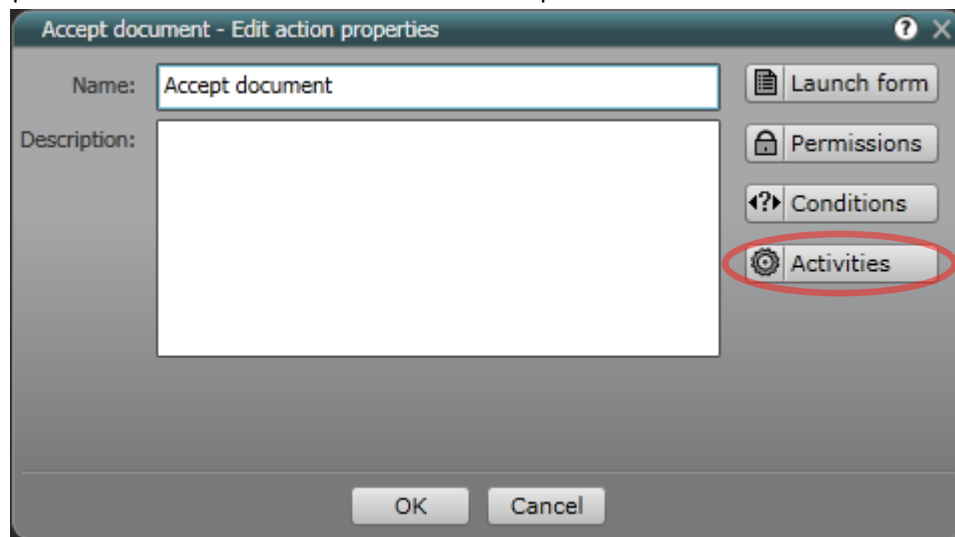
Here you can do the following:

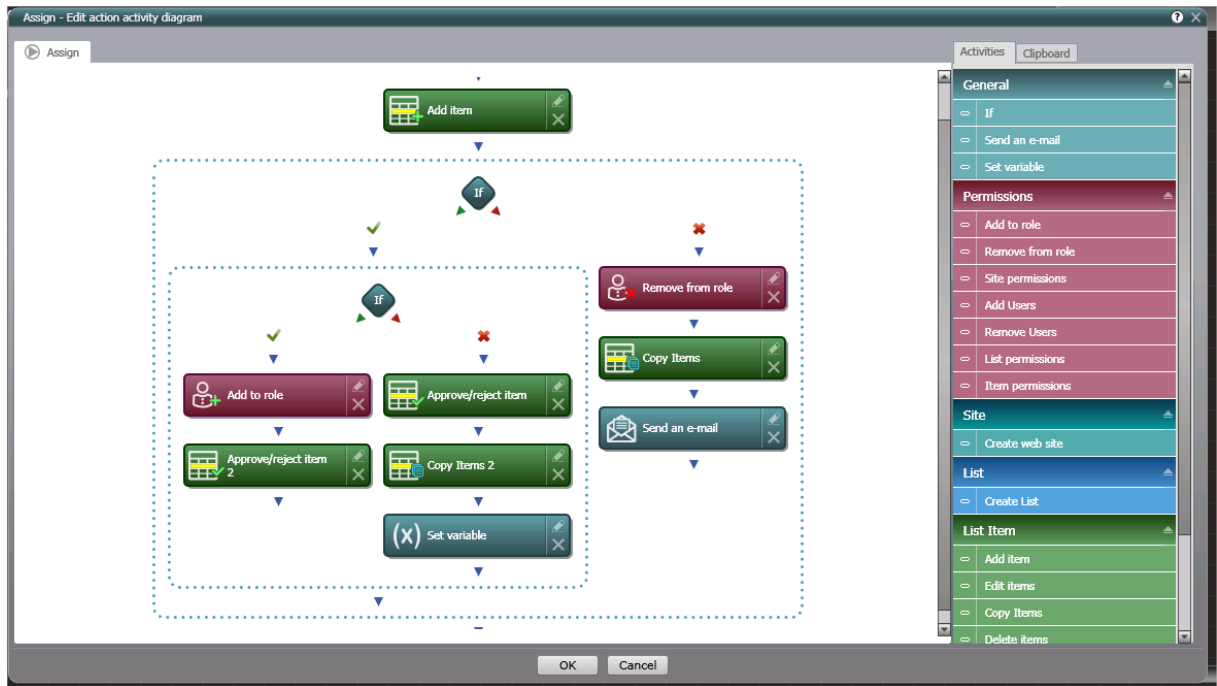
- Change the action name and description.
- Build Action Launch Forms.
- Set permissions, specifying users who can launch the action.
- Define a set of conditions which must be met in order to launch the action. For example, you might want to allow the action to be launched only on Sunday evening.
- Build sequence of activities to be performed when the action executes.

2.2.3 Activities

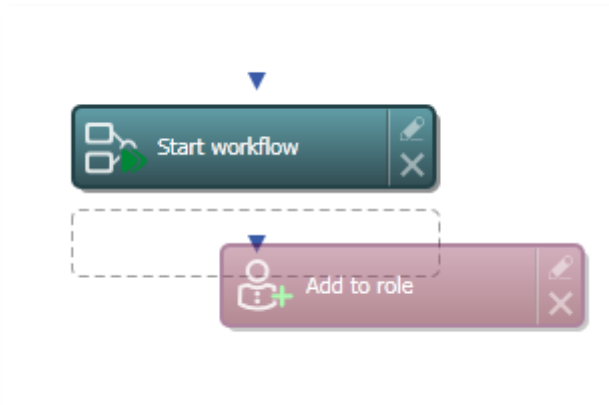
During transition between states, you might want to perform some additional operations, for example send an e-mail to a user who will have a task to perform in the next state. You can achieve this by using activities – small programs performing a given operation or operations. Activities can be set in a desired order, you can also execute activities when certain conditions are met. For all intents and purposes, you can define a whole new workflow – a sequential one.

Activities are placed on a special diagram – activity diagram – which can be accessed through the action properties window. Each action can have a unique set of activities.

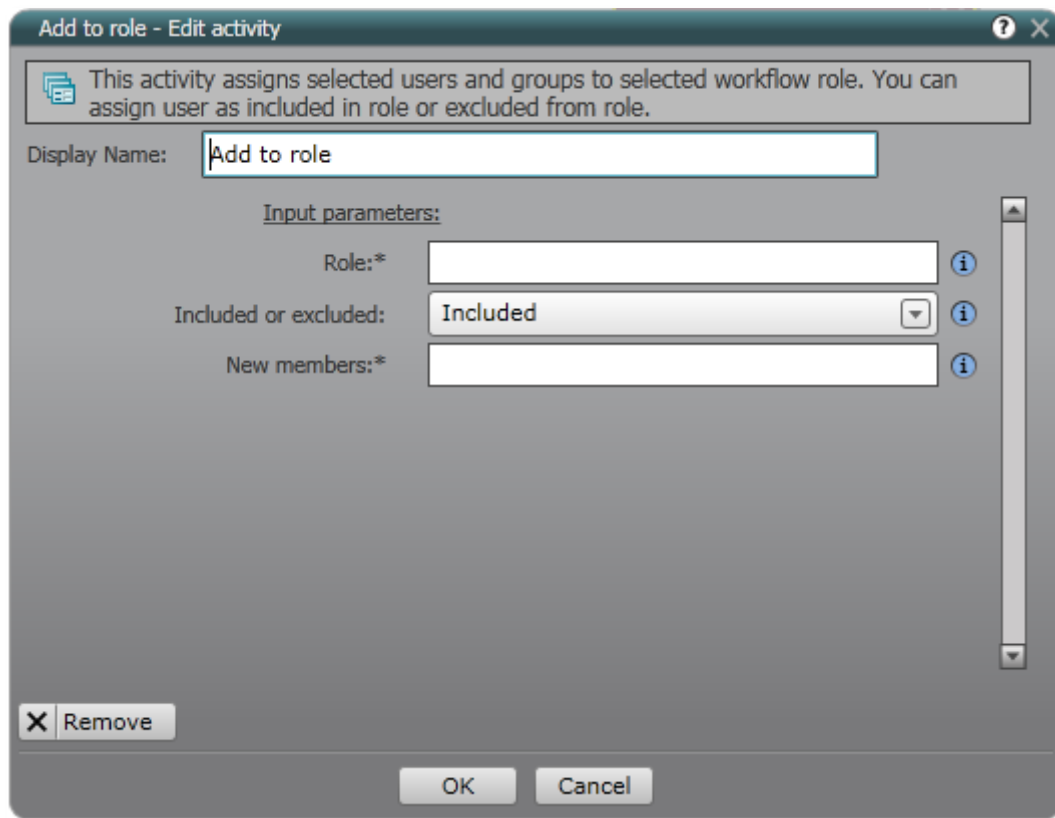




Adding activities to the diagram is very simple: you just drag them from the list on the right and drop them on the diagram:




When you have added a new activity to the diagram, you might want to edit the activity's parameters. Double-click on the activity or click the pencil icon in the top-left corner of the activity. A new window will open:

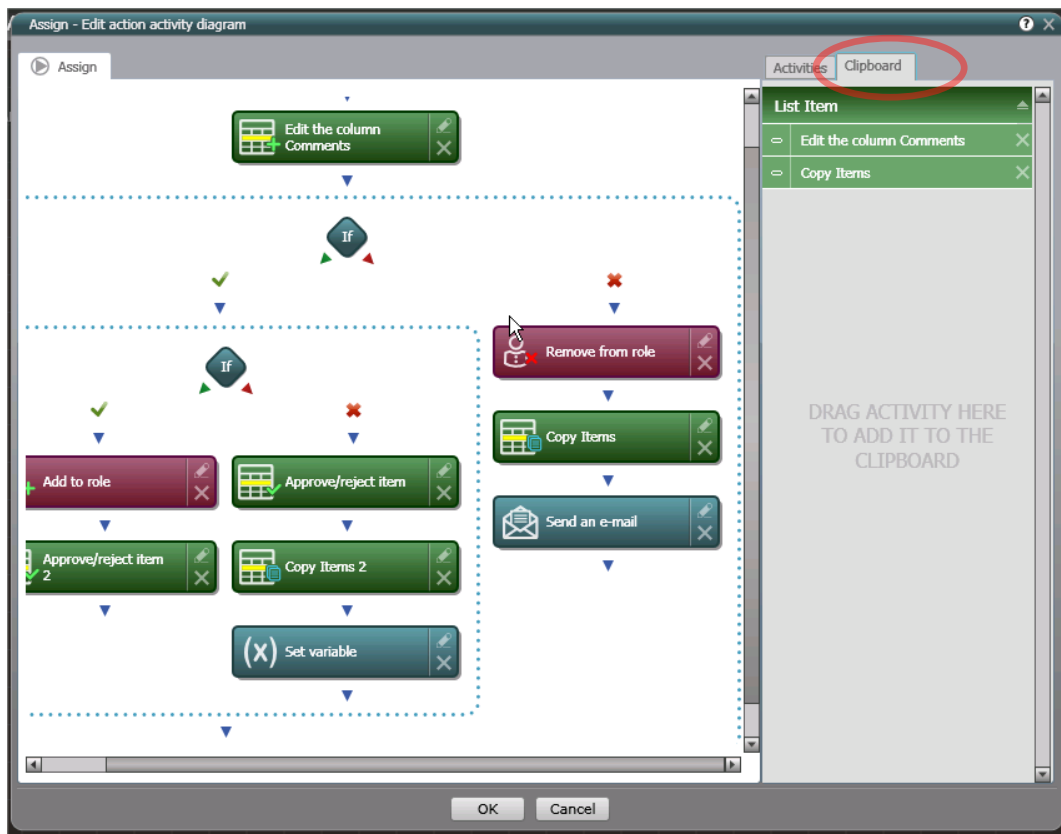


In this window you have a brief description of the activity, telling you what operation it performs.

You can change activity's displayed name and set the parameters the activity takes. Some of them might be required (marked with an asterisk) and you must provide them with a value; otherwise the activity will not run properly.

You can see a description of each parameter in a tooltip: just point your mouse cursor over the small  icon next to the parameter you want to learn about.

You can reuse activities that you have already defined, retaining its parameters, so that you won't have to set them again. Just drag the chosen activity from the diagram and drop it on the list on the right. The "Clipboard" tab will be opened automatically and your activity will appear on the copied activities list. If you want to use this activity elsewhere, simply drag and drop it from the clipboard to the diagram.



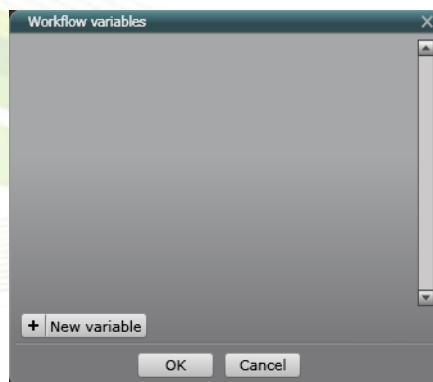
The clipboard is shared for all actions, so you can copy activities from one action to another.

Also, the clipboard is saved with workflow definition, so when you can exit the Designer without losing copied activities.

2.2.4 Variables

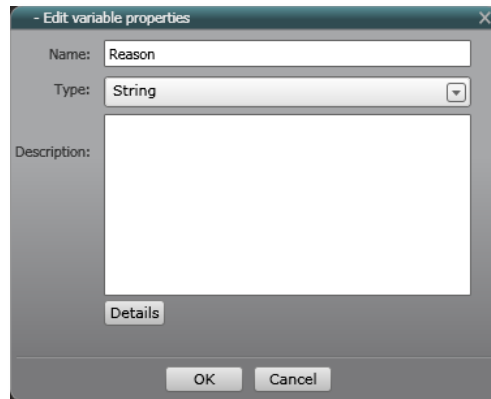
Workflow variables are used to store information within the workflow. Thanks to variables it is possible to ask user to provide some data (in our example it might be a reason for rejecting an application) in order to use it somewhere else in the workflow. Some activities return the result of their work, for instance the activity “Add item” returns the ID of the element it created.

Variables can be created in the “Workflow variables” window, which can be accessed from the toolbar (“Manage workflow variables”) or through action properties, by clicking the “Manage variables” button on the “Assign variables to action” form.

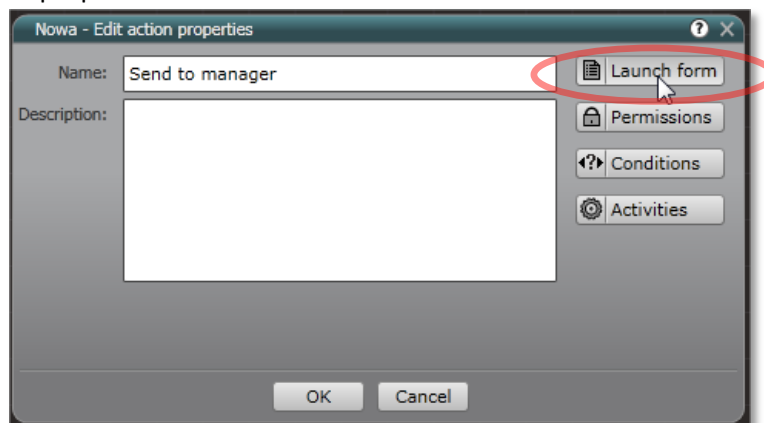


When adding (or editing) a variable we can define its type (integer, real number, string, date and time, true/false).

We can also name it the way we chose and provide a small description.



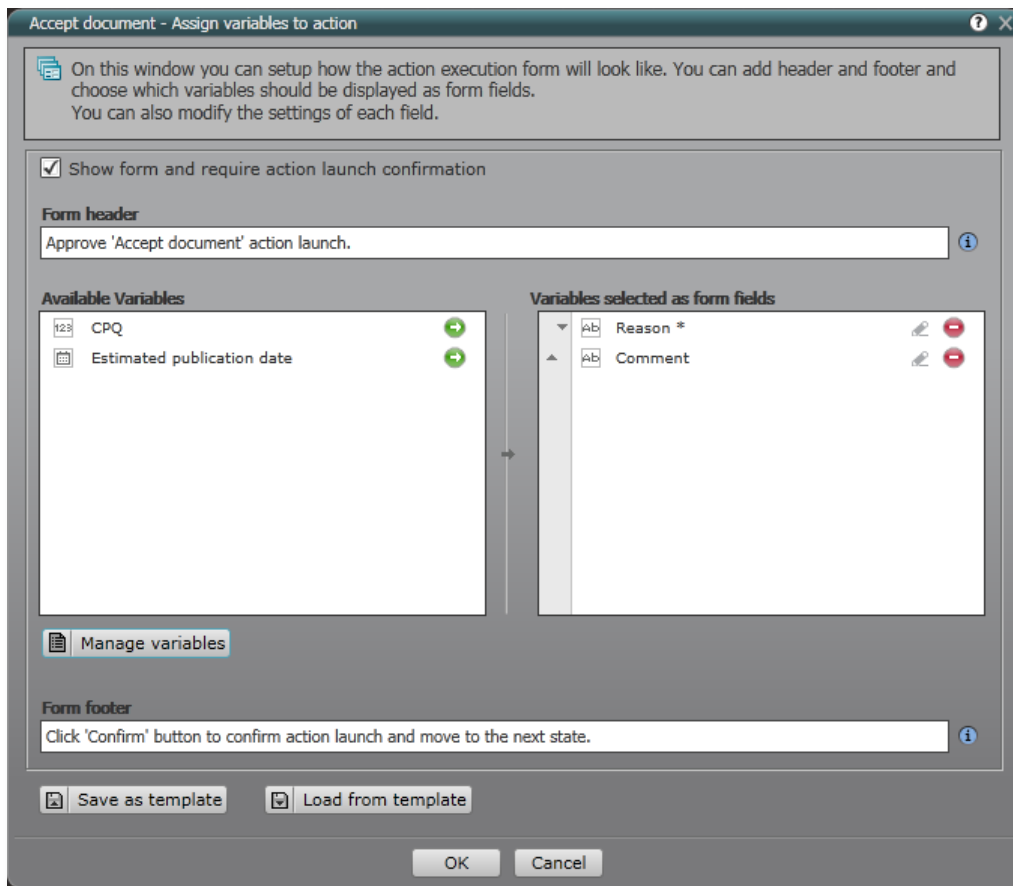
If we want to request user to provide a value for this variable, we need to assign the variable to action. Go to action's properties window and click the "Launch form" button.



In the following step you can assign variables to action, thus creating Action Launch Form.

2.2.5 Action Launch Forms

Action launch form is a page that is shown after the user clicks an action link on an item's context menu or on item's view form. With this form, you can request or require user to provide information you can then use within the workflow. This data, as mentioned before, will be stored in workflow variables. The first step of building action launch form is to assign variables to an action. This can be done in the "Assign variables to action" window:



Here we have the following elements:

- Checkbox indicating whether the form should be displayed or not. If you uncheck it, no form will be shown to user, and no data could be collected before action execution.
- List of available workflow variables, i.e. all the variables defined in the workflow and not already assigned to edited action. You can assign a variable by either double-clicking on it or by clicking the green icon on the right. If you want to define new variables, click the “Manage variables” button, which will open the “Workflow variables” window described before.
- List of assigned workflow variables. For these variables a form will be generated when user launches the action, so that data could be collected.
- Form header and form footer, where you can provide things like form title, information to user, etc. You can use HTML and JavaScript, so you can do some advanced formatting, insert images and links, and even embed web applications, for example developed in Flash or Silverlight.
- “Save as template” and “Load from template” buttons, which allow you to save the current action launch form definition, along with all its settings, as a template, which then can be used in a different action.

It is important to understand the difference between workflow variables and form fields. Workflow variable is an abstract object where data is stored and from where it can then be retrieved and used elsewhere within the workflow instance (i.e. workflow running on a given list item).

Form field is a part of user interface, a place where user can enter data, which will then be assigned to workflow variable. Fields are generated automatically when user launches an action. For each workflow variable assigned to a given action, one field is generated.

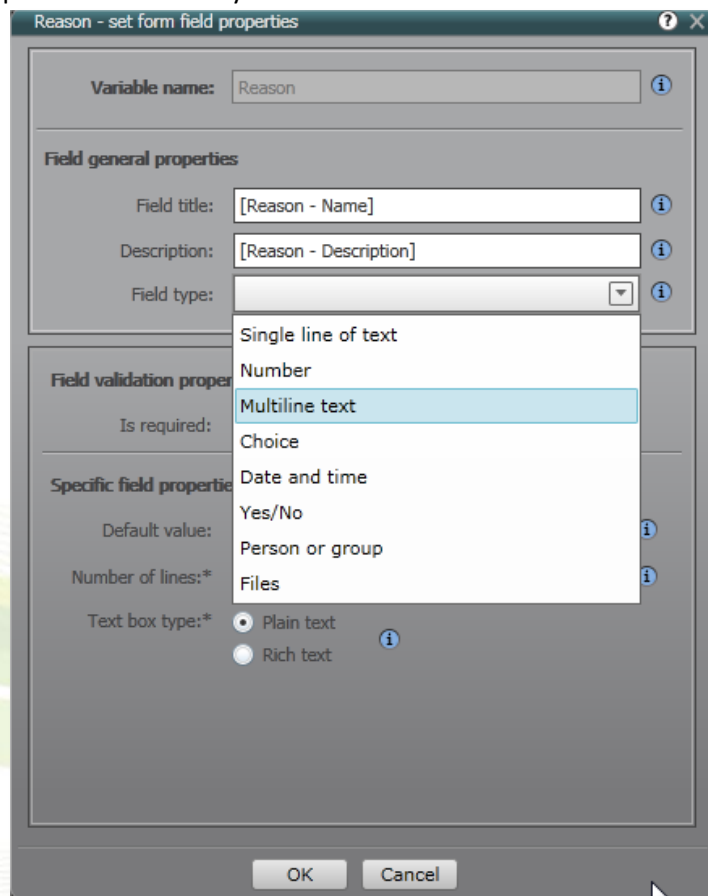
A field can be of a given type, meaning that you can restrict the type of data user can enter in the field to, for instance, date and time only. The field will be rendered in a way which will help user provide valid data, so for date and time field a date picker will be shown.

Note that workflow variables have their own types, so you can use only field types compatible with corresponding variable. For more information on this matter, please see Workbox help: Functionalities -> Action launch form -> Field properties.

A sample field can look like this:



Please note the label and description on the left, which are two of the field's properties. Each field has a set of properties defining its appearance and data it accepts. These properties can be set in a "Form field properties" window, which can be accessed by double-clicking assigned variable or a pencil icon. The properties window may look like this:

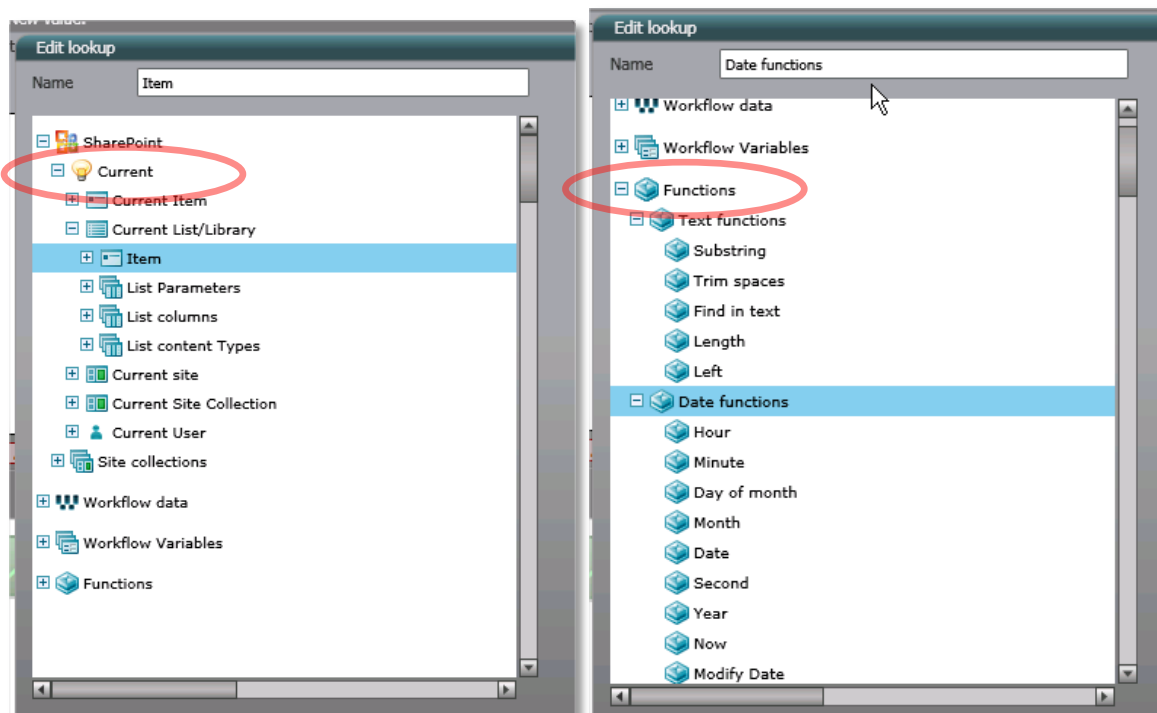


Note: You can change order in which the fields appear in the form. Use small up and down arrows shown on the left side of assigned variables.

2.2.6 Lookups and Functions

Lookups allow you to use external data in your workflow. You can use lookups in many places within workflow, for instance in activity parameters, conditions, functions or action launch forms.

Lookups are grouped in trees. The most common is the “SharePoint” tree, containing references to your SharePoint content. The “Current” branch allows you to get the data from the item on which the workflow is currently running, from the list this item is created on, from the site of the current list, and also the information about the current user. The “Workflow data” tree contains references to objects within workflow, e.g. roles, and the “Workflow variables” tree allows you to reference workflow variables. For all intents and purposes, lookups in Workbox work similarly to lookups in SharePoint.



There is one more tree on the lookup list, called “Functions”. Functions allow you to manipulate data in a way you need. You can, for example, replace a string in a given text, do advanced mathematical calculations or query external database.

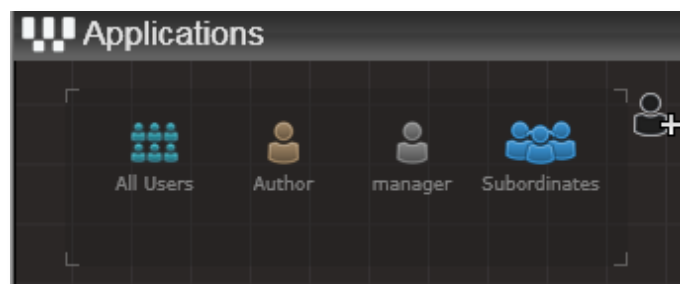
2.2.7 Permissions

Workbox bases on SharePoint permission model. You have control over which users can initiate which actions and who can edit or read which fields of an item in a given workflow state.

2.2.7.1 Roles

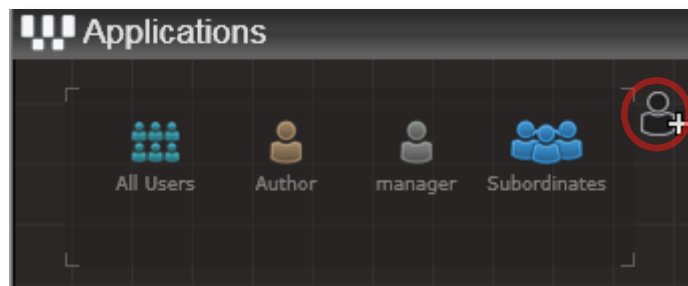
To simplify permission management, Workbox introduces workflow roles. Roles are designed to reflect not the SharePoint's security settings, but actors involved in the business process.

All workflow roles are available in the top left corner of the designer workspace.

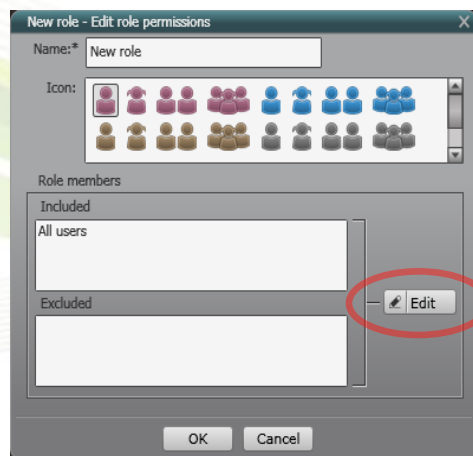


2.2.7.2 Adding New Role

To add a new role, click on the “Add new role” icon.

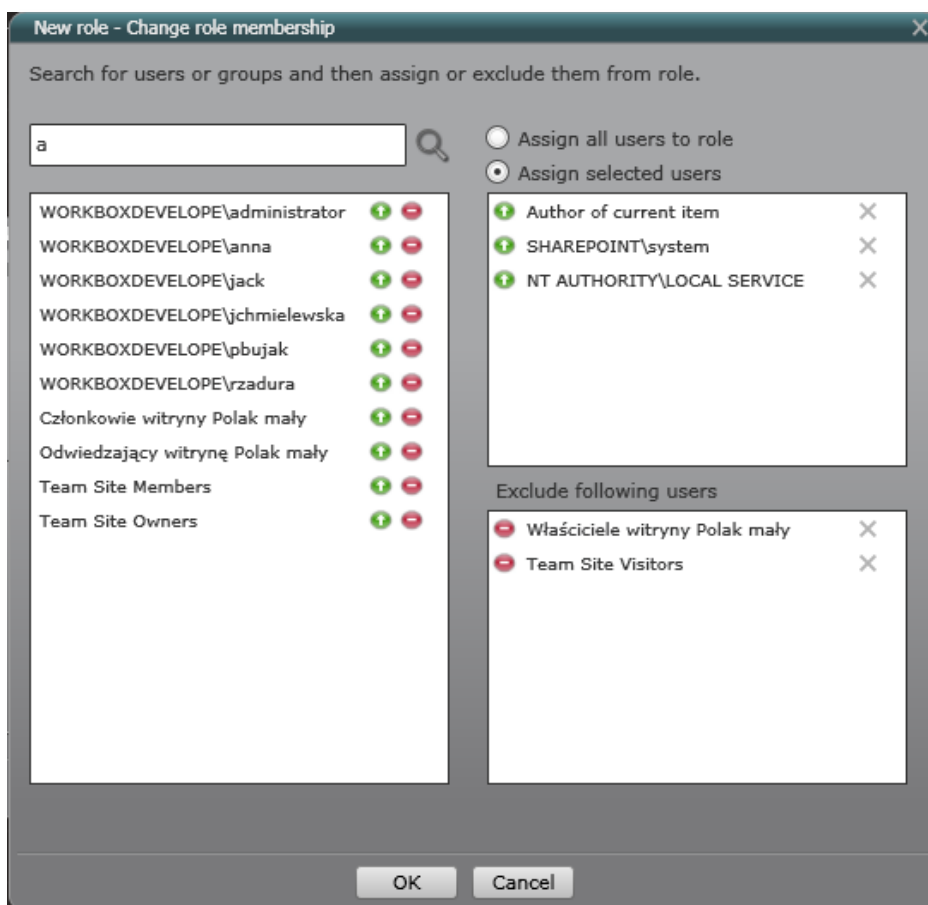


In the role definition window you can set the role's name, select a convenient icon and assign SharePoint users and groups. To do the latter, click the “Edit” button or either the “Included” or “Excluded” areas.



To define who is to be included in the role and who should be excluded from it, we use the “Change the membership” window. By default, all users are included in the role (“Assign all users to role” is selected). If we want to assign only specific users, we should use the search box, enter a part of user name and click the “Find” icon. Found users will be shown on the list below. To include user in the role, click the green icon. To specifically exclude user from the role, click the red icon.

The exclusion option is useful when we want to include in role a group, but without specific users.



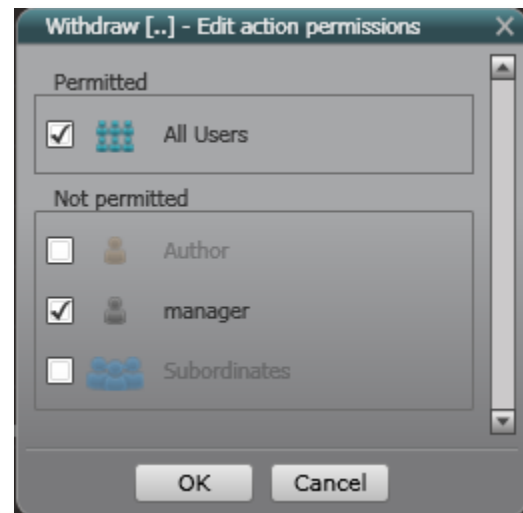
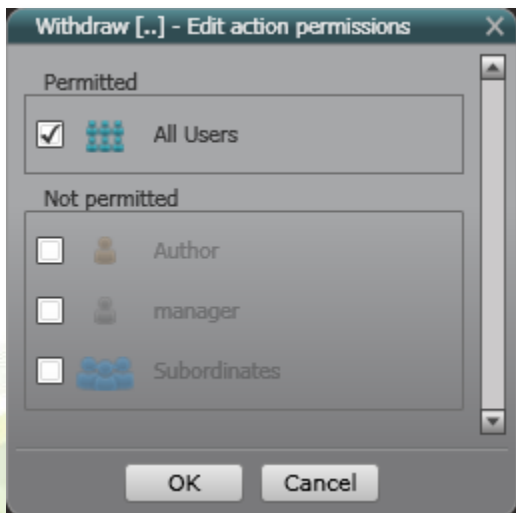
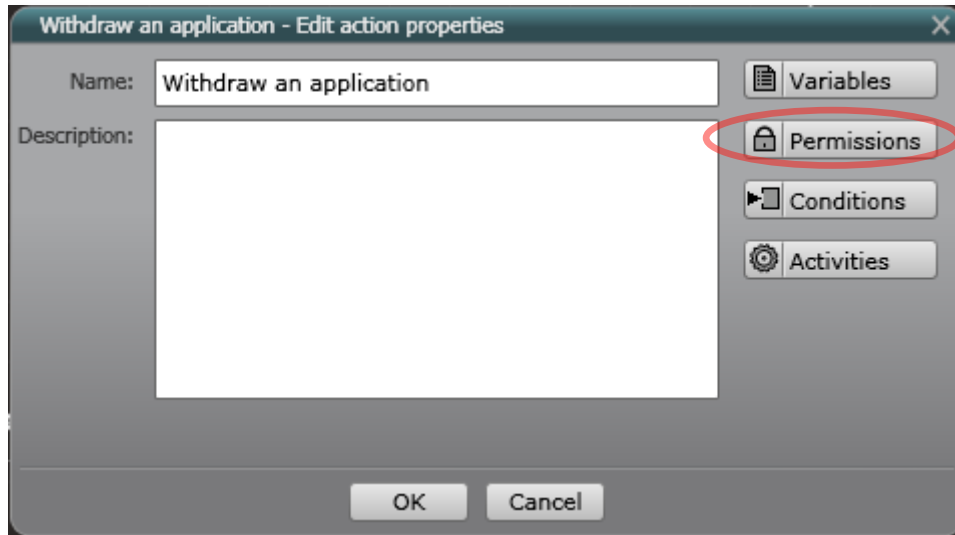
Note: You can select the user named “Author of current item”. This user is dynamically assigned when the workflow starts – it is the user that has created the item on which the current workflow instance is running on.

2.2.7.3 Assigning Roles to Actions

To permit users in a role to launch action, simply drag this role from the role container (top left corner of the designer workspace) and drop it on the action.

Note: By default, each new action has the “All Users” role assigned.

A different way to assign a role to the action is to open “Edit action permissions” window by clicking the “Permissions” button in “Edit action properties” window.



Here you can permit or deny users in roles executing the action. Simply check or uncheck the checkboxes next to roles.

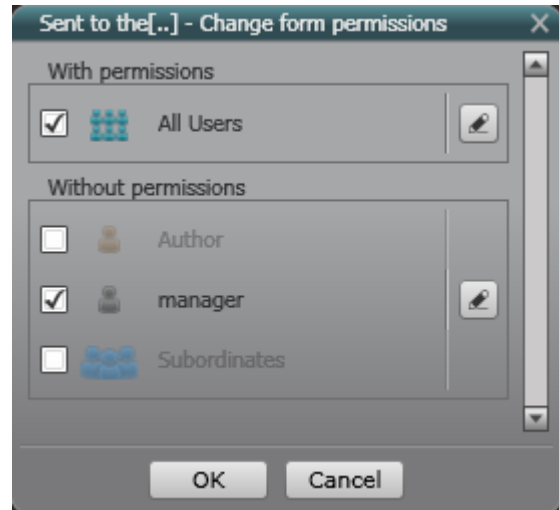
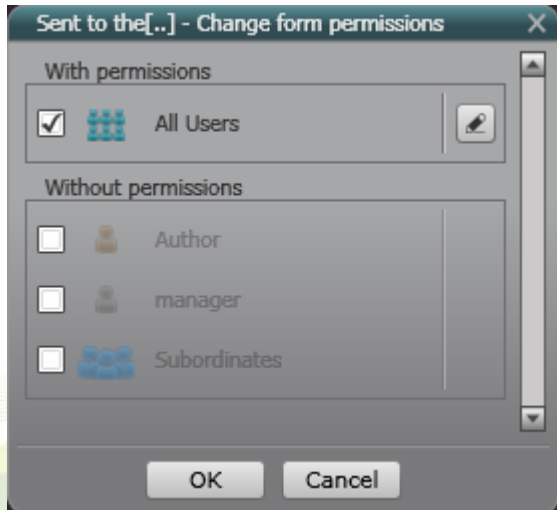
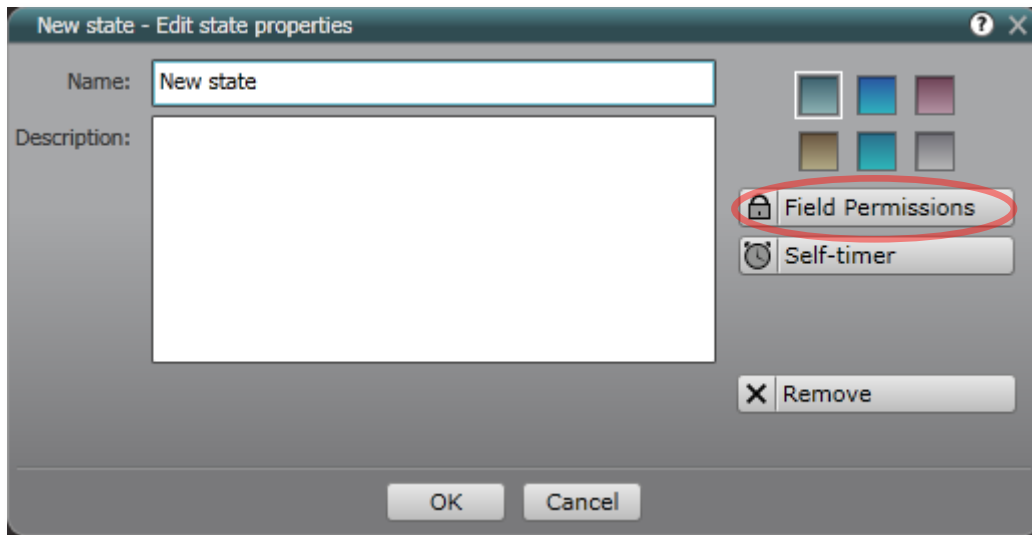
Note: When you check the checkbox next to a role, the role is not moved automatically to the “Permitted” section. It will be displayed in the “Permitted” section only when you confirm your changes and reopen “Edit action permissions” window.

Note: Users who are not included in roles assigned to action will not be able to launch the action.

2.2.7.4 Assigning Roles to Item Fields

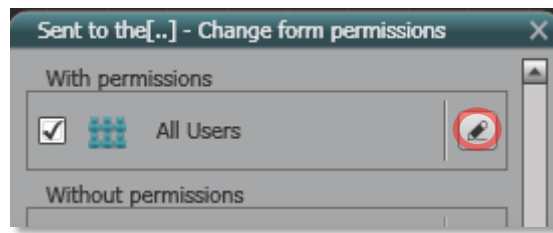
When workflow is in a given state, we can control which users should be able to either view or edit specific fields of the current item.

As was the case with action permissions, you can assign roles to state by dragging them from the roles toolbar and dropping them on state, or by clicking the “Field Permissions” button in “Edit state properties” window.



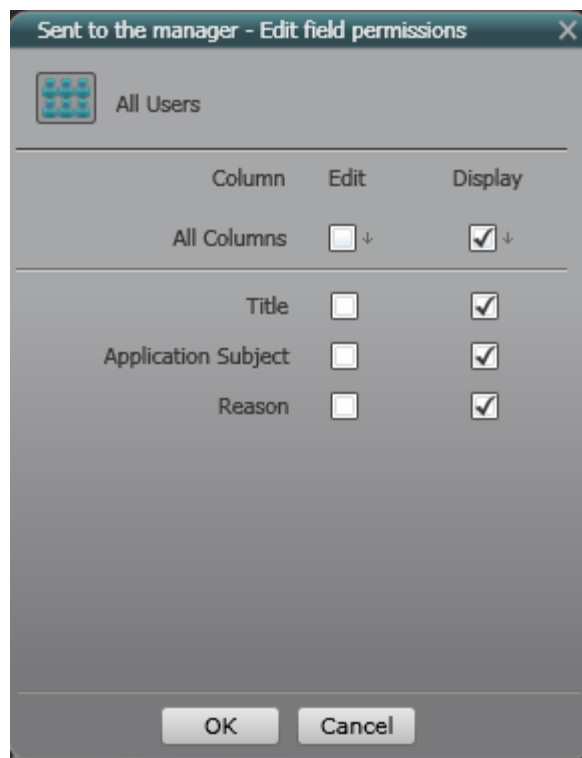
Note: “Change form permissions” window works the same way as “Edit action permissions” window. There is one difference, though: you can edit to which item fields the permission should be granted.

By default, when assigning a role to state, all of the role’s members are granted permissions to both read and edit all item fields (excluding a workflow column named “[your workflow name] – state”, which can only be viewed). To distribute permissions in a greater detail, click the pencil icon next to the role.



This will open “Edit field permissions” window.

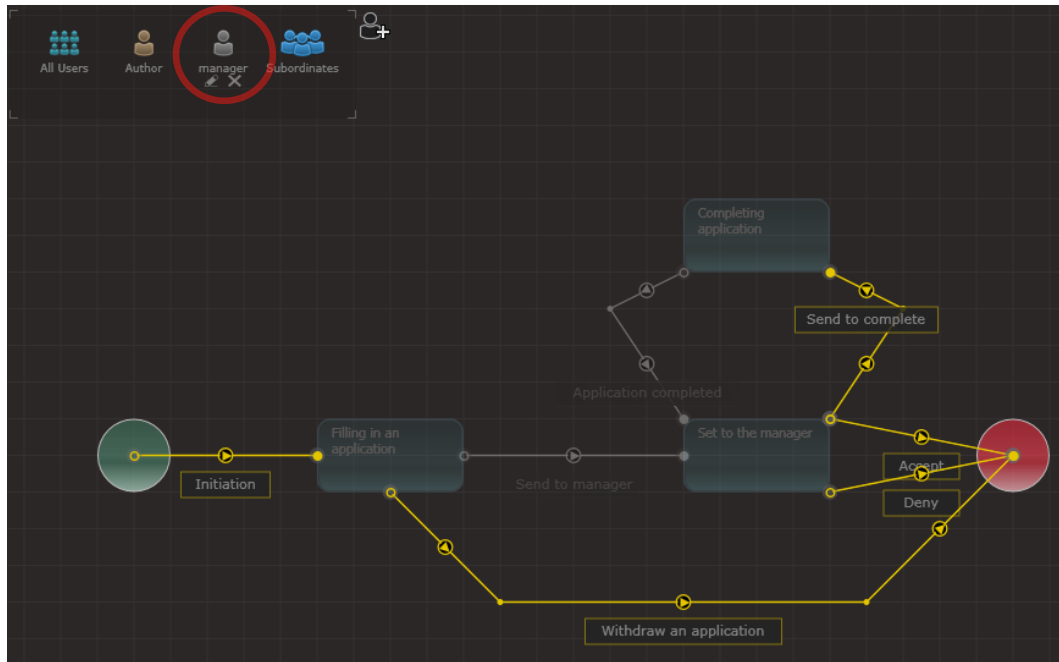
Checking appropriate checkboxes will give either display or display and edit permissions to all users included in the role.



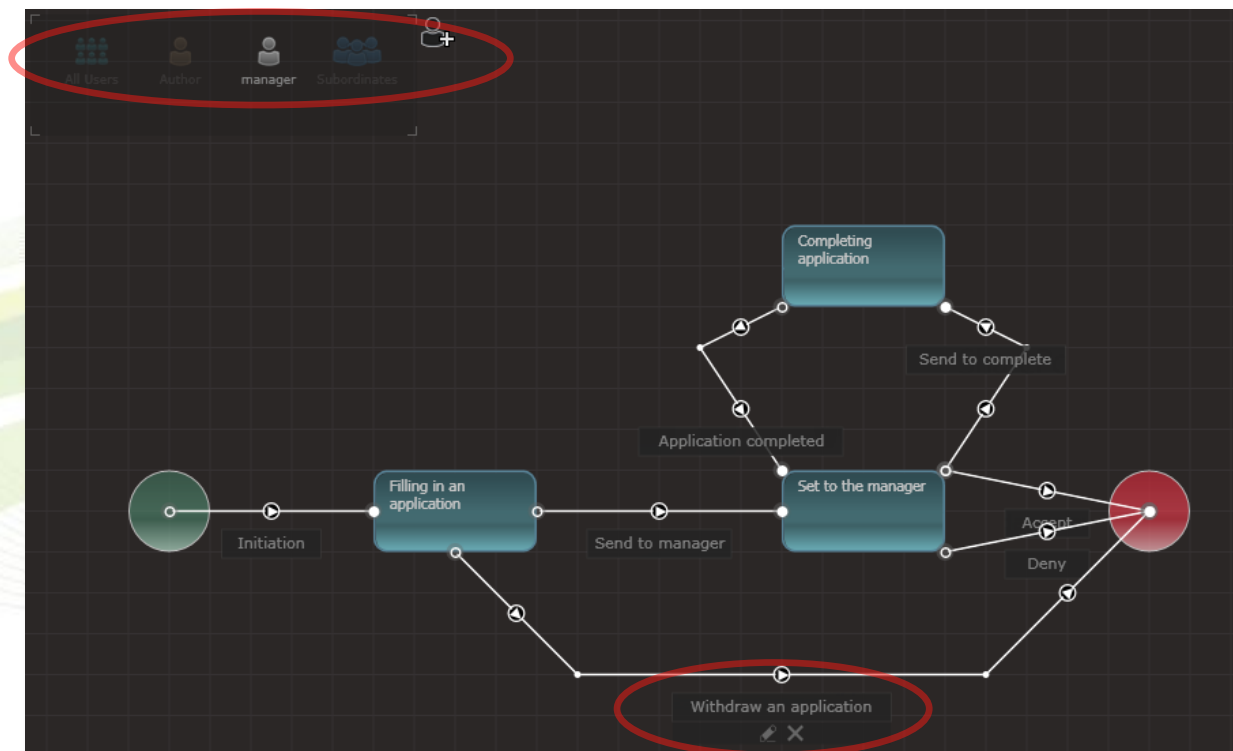
Note: Giving the “edit” permission implicates giving the “display” permission as well.

2.2.7.5 Checking Permission Settings

You can easily check which role has permissions to which actions and states. Just hold your mouse cursor over a role and the workflow diagram will change: states and actions to which the role was not assigned will be grayed-out, others will be highlighted.



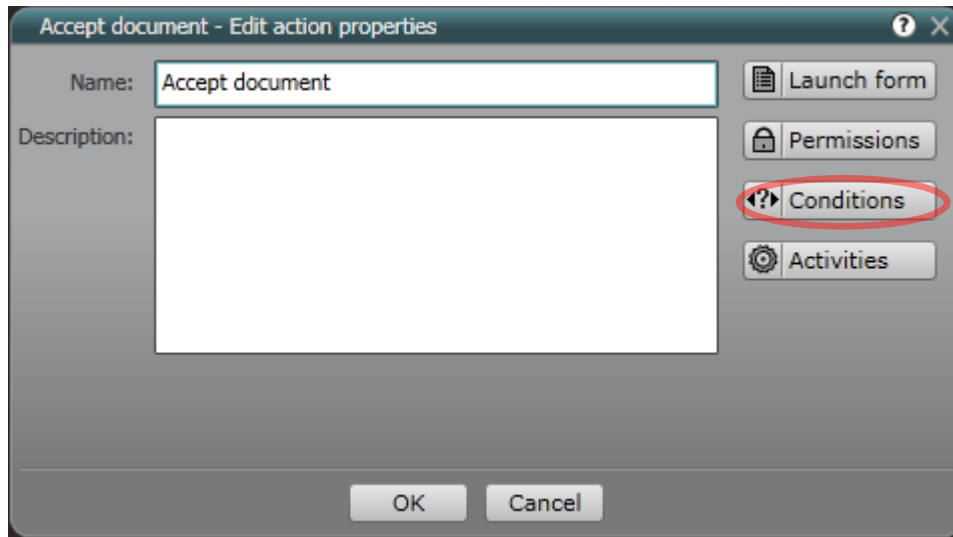
You can also check which roles has been assigned to a given action or state: simply hold your mouse cursor over an action or a state and roles which has not been assigned to the object will be grayed-out.



2.2.8 Action Execution Conditions

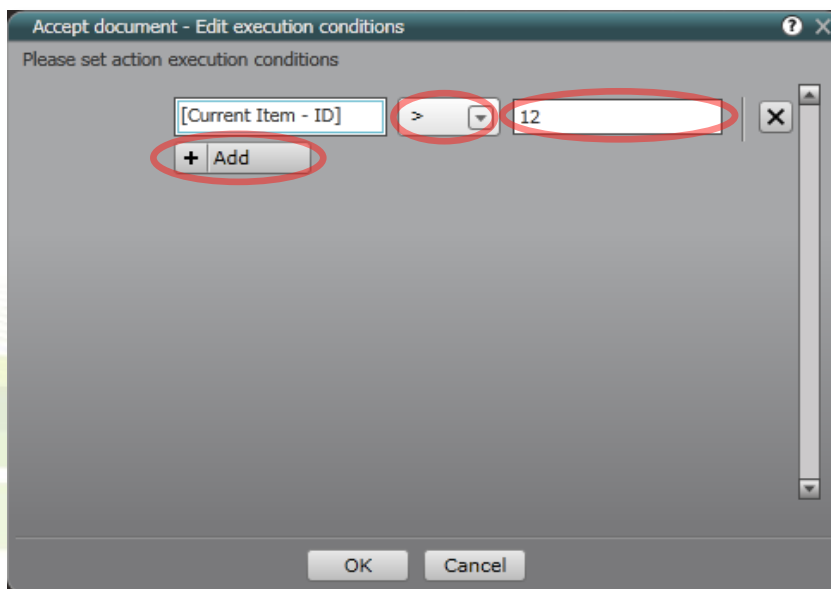
You can define a set of conditions which must be met in order before the actions could be executed.

To define execution conditions, open action properties window and click the “Conditions” button.



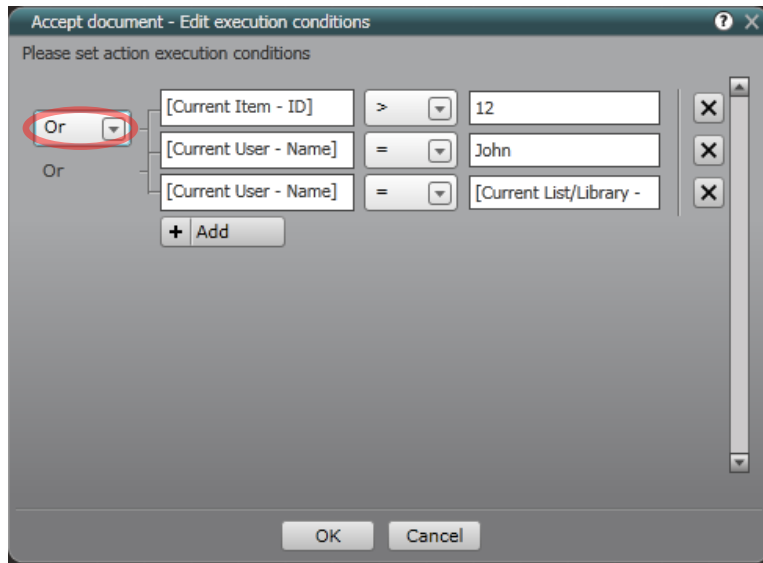
A new window will open, where you can define conditions for the action. Clicking the “Add” button will add a new condition. Now you have to define both sides of the condition and select operator.

Note: While the left side of the condition cannot be empty, the right one – can.



You can, for example, check if the current date is smaller than the expiry date or if the current user is the author of the item.

If you define more than one condition you will be able to choose if all or only one of the conditions must be met. Simply choose “AND” or “OR” logical operator from the dropdown list on left side of the first condition.



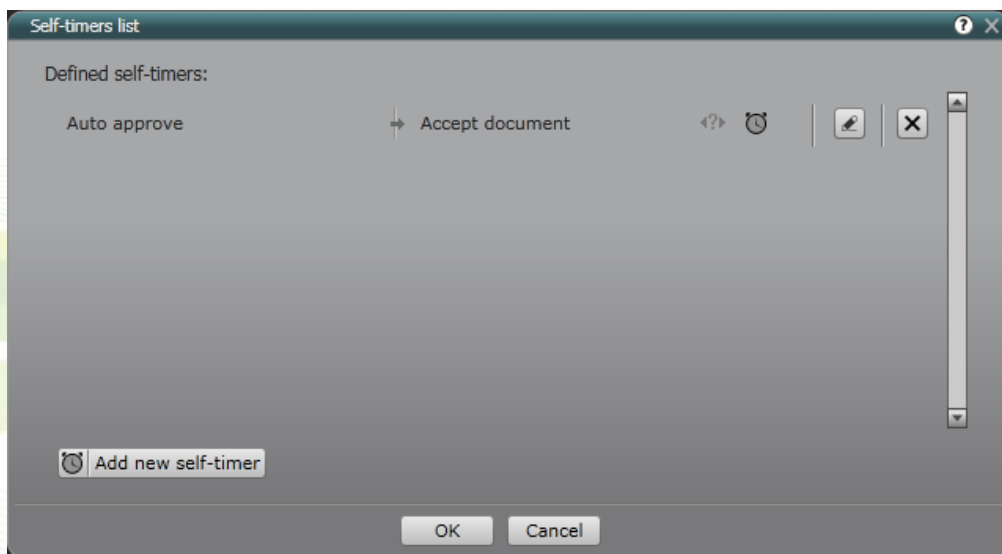
If these conditions are met, action will be displayed to the user. If not, action will be hidden. To remove conditions click the “X” button next to chosen condition.

Note: Conditions are complementary to permissions. User must have permissions to the item AND the execution conditions must be met to allow user to execute the action.

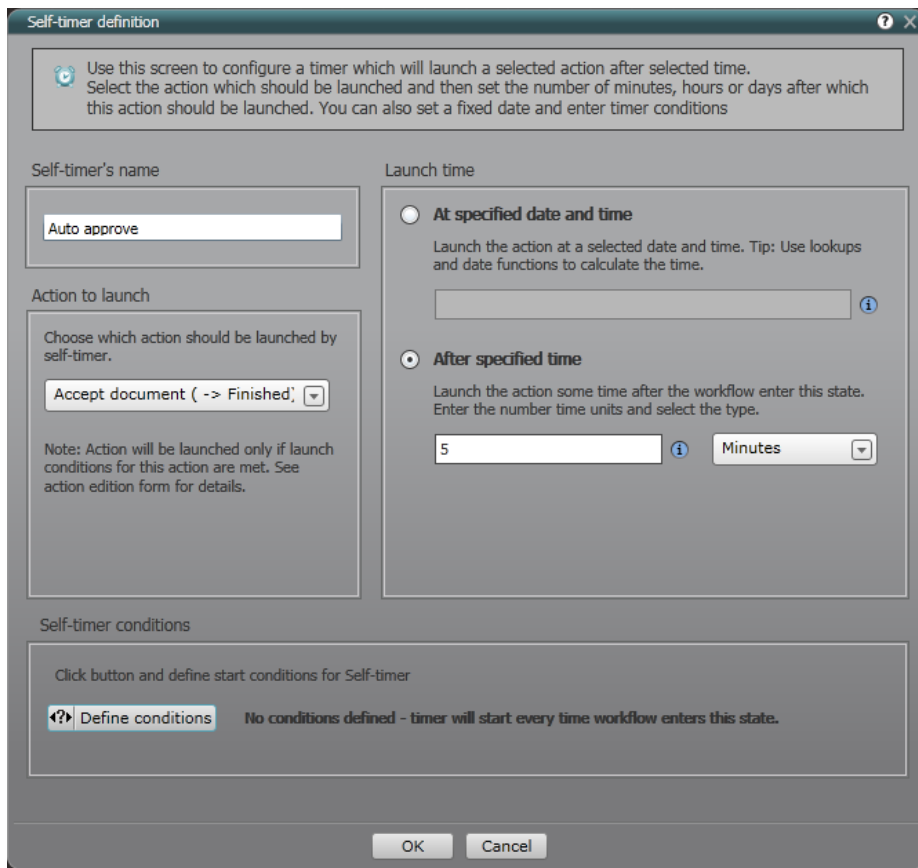
2.2.9 Self-Timers

Self-timer is a mechanism which can automatically execute an action when given conditions are met. For instance, you might want to automatically reject an application if it is in a “Sent to a manager” state for over 5 days.

Self-timers are defined in a state. For each state you may define more than one self-timer.



To add a new self-timer, simply click the “Add new self-timer” button. To edit an existing one, either double-click it or click the pencil icon. You will enter the “Self-timer definition” window.



Here you can set the self-timer's name and action which it should execute. You can only choose from among actions going out of the state for which you are defining the timer.

Next, you can define time when the timer should be executed. You can either set a fixed date and time or a time after the workflow enters the state.

Note: Minimal time interval is one minute. If you set "0" in "After specified time" field, the timer will be executed immediately.

If you find it necessary, you may also define a set of conditions which will have to be met in order for the self-timer to execute selected action.

Note: If the action to be executed by a self-timer has its own execution conditions defined, those conditions must be met as well in order for the action to execute.

2.2.10 Saving Workflow

The option saves the workflow definition to the server. Saving a workflow does not cause its deployment on a list.

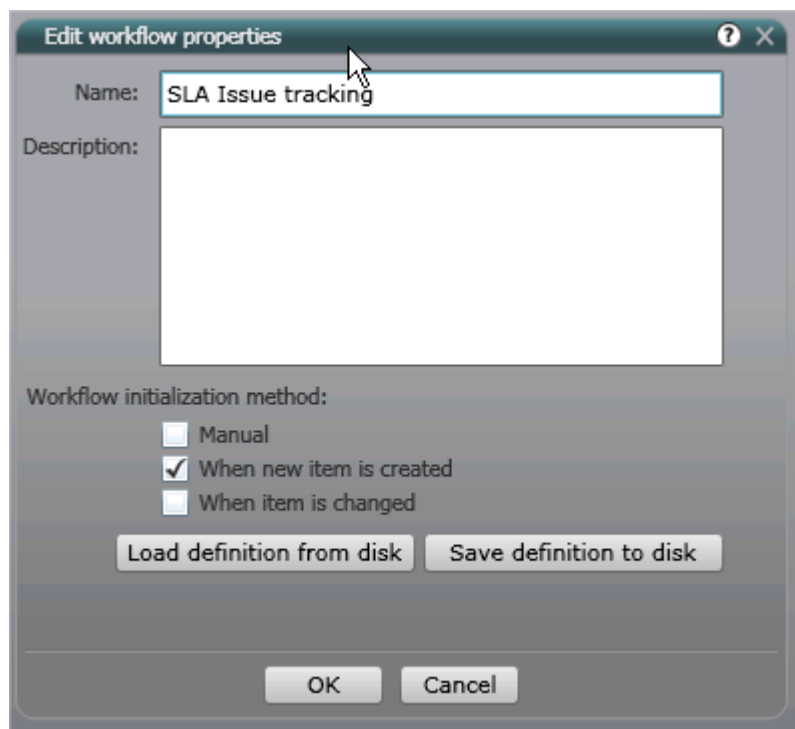
2.2.11 Deploying Workflow

Deployment (previously called "association") of a workflow binds it with the list, meaning that new instances of the workflow can be run.

Note: Deploying a workflow automatically saves its definition to the server, so there is no need to save the workflow before deployment.

2.2.12 Workflow Properties

Here we can set when new workflow instances should be launched, change workflow's name and add a short description of what the workflow does.



Note: Clicking the “Save definition to disk” button will save current workflow definition to disk. This way you can back up the workflow definition. You can then import it (even on a different location) by clicking the “Load definition from disk” button.

2.2.13 Workflow Validation

Validation is run automatically when deploying workflow. The definition must be valid, otherwise the deployment operation will be terminated.

You can use this function manually as well and see if the workflow is valid.

2.2.14 Procedures

Procedures are used to group activities, not unlike containers in activity diagrams. The main difference between activity containers and procedures is that procedures are defined for the whole workflow, meaning that you can use them in various places. While this can be done by first copying container (along with its activities) to activity clipboard and then copying it from the clipboard to activity diagram of a desired action, the solution has its limitations, namely when a need arises to make changes to a copied activity sequence. In this case, the changes must be done manually in every place the container was copied to. In complex workflows, this can be a daunting task.

When you make changes to the sequence of activities defined in a procedure, those changes will have effect in every place the procedure is used, thus vastly simplifying workflow management.

2.2.14.1 Creating Procedures

Adding a new procedure is an easy task. Using the "Manage procedures" button located on the Designer toolbar, you open a window with a list of all procedures defined for the workflow. Simply click on a "New procedure" button, which will open another window, where you must enter procedure's name. You can also provide a brief description for your needs and define activity sequence ("Edit diagram" button). The sequence is defined in exactly the same way you define activities for actions.

Click "Ok" on both "Edit procedure" and "Procedures" windows - and that is all. You have a new procedure you can use in your workflow.

2.2.14.2 Using Procedures

When you open an activity diagram, you will notice a new category on the toolbox: "Procedures". Here are listed all procedures you can use in the current diagram.

To use a procedure, simply drag it from the toolbox and drop it in a desired place on the diagram - the same way you add activities. Procedure behaves the same way any other activity.

Note: You can place a procedure inside another procedure's activity sequence. Workbox Designer will automatically hide all procedures that cannot be put inside the current procedure. This is to prevent the possibility of creating circular references.

2.2.15 Size and Performance

Crucial for any workflow is its performance. In Workbox, performance is shaped as follows:

- Time to start workflow depends on the number of activities in the initiating action.
- Action's execution time depends on the number of activities in the action.
- Activity's execution time depends on its complexity and the number of lookups used.
- Workbox Designer's performance depends on workflow's size.

We encourage you to apply the following guidelines, which we present here as best practices concerning creating workflows in Workbox:

- Minimize the number of activities used in actions, especially in the initializing action.
- Minimize the number of lookups (both to SharePoint objects, functions or the flow elements) used in workflow. If a lookup is used more than once, consider storing its value in variable and use the variable instead.
- Frequent changes to variables' values (either using "Set variable" activity or output parameters of other activities) may severely impair workflow's performance. We advise that you modify values of the variables only when necessary. Additionally, we advise you do not use too many variables. If their number exceeds twenty, think about using them for multiple purposes (i.e. storing values from various sources).
- Maintain smallest possible size of workflows.
 - Size up to 1 MB is recommended.
 - Size between 1 MB and 3 MB is acceptable, though it might cause slower work of both Workbox Designer and deployed workflows.
 - Size above 3 MB is decidedly not recommended.

- In Workbox Designer, when saving workflow definition, an alert will appear when the above thresholds are exceeded.
- If maintaining small size of workflow is impossible, consider dividing it into a number of smaller workflows.
- Remember that Workbox is built on Windows Workflow Foundation, and therefore inherits all limitations of the platform.

2.2.16 Advanced Workflow Editing

This functionality allows you to provide any value in normally constricted fields (i.e. in activity parameters). You can, for instance, enter SharePoint list's URL in "Edit items" activity's "List" field.

The functionality is turned on and off on Workbox Settings page for a given list and can be toggled only by Administrator.

Note: The functionality is intended for advanced users who have experience with administrating and developing SharePoint-based solutions.

We advise care when using this functionality.

3 How to Use Workbox?

When the workflow is created and successfully deployed, we can start working on the SharePoint list on which it was deployed. In our example we assumed that the workflow will begin automatically after creating a new element on the list.

Note: If the workflow was set to be run manually, select the “Workflows” option from the context menu of the list item’s context menu and launch a new workflow instance on the item.

The workflow will start and after a short while it will enter the first state (“Filling in an application” in our example). Here it will wait until an authorized user launches an action which will lead it to the next state.

3.1 Workflow Column

A list with a workflow running has two additional columns which are created automatically when a workflow starts for the first time. One column, named after a workflow (“Applications” and “Service” on the illustration below), is a standard SharePoint column, showing the general state of a workflow (i.e. “Starting”, “In progress”, “Completed” or “Error occurred”). The other is Workbox column (named “workflow_name – state”) and shows the exact state in which the item currently is within a workflow. These states are the states we have defined in Workbox Designer.

Title	Application Subject	Reason	Applications	Applications - state	Service	Service - state
Vacation !NEW	Need an approval for summer vacation		In Progress	Filling in an Application	In Progress	New

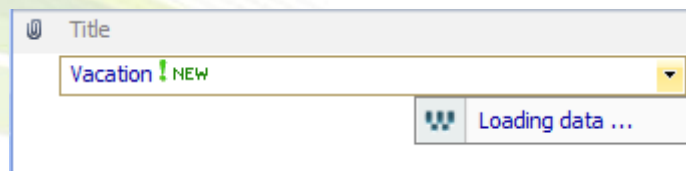
The columns are visible on a list view but they are not visible on the item view and edit forms.

If on a list there is more than one workflow running, each of the workflows creates its own columns.

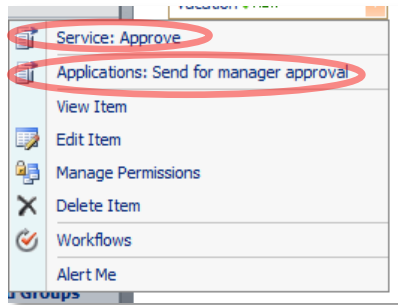
3.2 Item Context Menu

Workbox gives you the possibility to launch workflow actions from item’s context menu. It contains all workflow actions which user can launch in a given workflow state. If more than one workflow are running on the item, their actions will be in the context menu as well. Every action is preceded by the name of the workflow to which it belongs.

Note: When you expand context menu for an item, Workbox communicates with the workflow to determine which actions are allowed for current user and for which actions their execution conditions are met. During this process, the following information is shown:



As soon as Workbox gets the information it needs, the standard context menu is displayed. This may take several seconds, depending on the system load.



Actions can also be launched from the item view form. They are displayed in the toolbar in the same way as they are shown in the context menu.

3.3 Action Launch Form

When launching an action, user is shown a launch page (see chapter 2.2.5). Here the user can provide required information which will be used in the workflow.

Witryna Larrego > English > Calendar > Road show > Workbox: Launch action

Road show - Approval: Approve

Item submitted by **John Smith**
Please provide the required information to approve this event:

Budget *
Please enter the total budget of the event. Please provide a number between 0 and 50000.

Due date
Please enter the due date of this event.

Responsible
Please select a responsible person for finishing this event. Please provide user login or name. Only members of 'Authors' group are allowed.

Comment
Please add additional comments

Attachments

Lists of attached files:
ssp_config.gif

Click 'Confirm' button to confirm action launch.

On the illustration above, the field “Budget” is required (marked with a red asterisk). Only when a valid value in this field is provided the action could be launched.

3.4 Workflow History

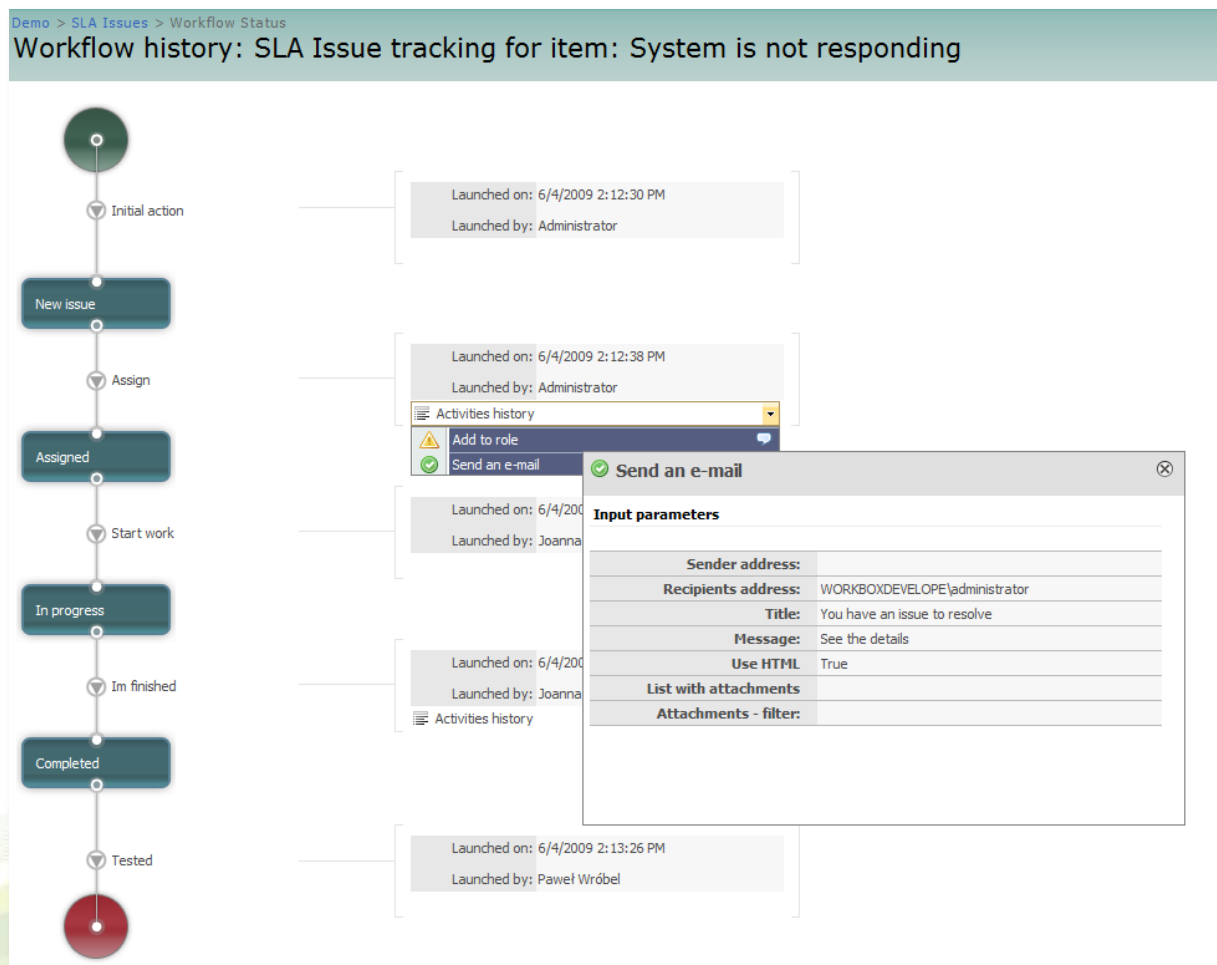
In any moment when workflow is running (and when it has ended) we can check its history. Here we will find various information about the process, how it worked, who launched which action, in which state the workflow waited most time, etc.

If you have sufficient permissions, you can also see the details of any action: what activities were launched and with what parameters, check if there were errors or warnings, what values they returned. You can also view what values were provided in action launch forms.

This information allows you to monitor the process, determine bottlenecks and, when developing the workflow, helps you to detect errors.

Demo > SLA Issues > Workflow Status

Workflow history: SLA Issue tracking for item: System is not responding



The screenshot displays a workflow history for an SLA issue titled "System is not responding". On the left, a vertical flowchart shows the stages: Initial action, New issue, Assign, Assigned, Start work, In progress, In finished, Completed, and Tested. On the right, a list of activity logs shows the following details:

- Launched on: 6/4/2009 2:12:30 PM, Launched by: Administrator
- Launched on: 6/4/2009 2:12:38 PM, Launched by: Administrator
- Launched on: 6/4/2009 2:13:26 PM, Launched by: Paweł Wróbel

An "Activities history" dropdown menu is open, showing options: "Add to role" (with a warning icon) and "Send an e-mail" (with a checkmark icon). The "Send an e-mail" dialog box is open, displaying the following input parameters:

Input parameters	
Sender address:	
Recipients address:	WORKBOX\DEVELOPE\administrator
Title:	You have an issue to resolve
Message:	See the details
Use HTML:	True
List with attachments:	
Attachments - filter:	

Future versions of Workbox will be backward compatible, so a new installation won't destroy all the work that's been done.

4 Troubleshooting

If any errors or other issues occur, please visit the Workbox Team blog at <http://wbblog.datapolis.com>. This site contains a list of known bugs and solutions to common issues. There you can also find additional information about Workbox's new features and development trends.

For troubleshooting, help and tips please contact our support team by mailing us at support@datapolis.com.

4.1 Known Errors

List of all known errors and typical solutions to them can be found at:

<http://blogs.datapolis.com.pl/workbox/Lists/Known%20errors/AllItems.aspx>.

Workbox is still expanding. While its base functionality is fully tested and stable, we are constantly adding new functionalities with each release. We strongly recommend you to register on <http://partner.datapolis.com>, where you will be able to easily track latest Workbox releases. Also, you will be able to get additional Workbox materials and to try our on-line demonstration environment with latest version of Workbox.

If you experience any problems with Workbox, either during installation or when using it, please contact us at <http://www.datapolis.com/en/support>.

If you are a developer, you can start creating your own activities and functions. Download Workbox SDK at <http://www.datapolis.com/en/Offer/Products/WorkBox/Pages/SDK.aspx>

If you are interested in purchasing a license, see our licensing and pricing information at <http://www.datapolis.com/en/Offer/Products/WorkBox/Pages/SaleInfo.aspx>