Getting Started With SharePoint OnlineWorkflows

By

Robert Crane

Computer Information Agency

http://www.ciaops.com

Terms

This Guide from the Computer Information Agency is provided as is. Every effort has been made by the author to ensure that information provided is correct however this cannot be guaranteed.

By using the Guide you also acknowledge that any work performed on production systems is a potentially dangerous act and may involve significant business risk and downtime. You hereby agree to release, waive and discharge the Computer Information Agency and/or the author from any liability incurred to yourself, your business or customers for any and all loss or damage, and any claims or demands therefore on account of problems arising from the use of this Guide.

By using this guide you hereby assume full responsibility for any risk to computer systems, now and forever arising out of, or related to the use of this Guide on any computer system.

Distribution and Duplication Guidelines

This document is copyright and only available directly from the Computer Information Agency. If you have received it via any other means please contact www.ciaops.com immediately to arrange for a registered copy.

You are permitted to make backup copies of the Guide for your own personal use and for backup purposes; however you are not permitted to share them with anyone else, without obtaining specific written authorization from the Computer Information Agency. Providing the documentation to a third party, posting of documents to the Internet or public/private networks are all examples in violation of the license and copyright agreements.

By using this Guide you agree to these terms.

Preface

SharePoint workflows is a topic that consumes many books. At its heart it involves coding which is by no means a simple or trivial task. The aim of this book is to provide you enough information to get you started with creating workflows in SharePoint Online. It is not designed to be a book about coding or about the complete capabilities of SharePoint Designer, for that you need to look elsewhere. It is simply meant to get you from zero knowledge of SharePoint workflows to creating your first basic workflow and helping you understand what is possible.

Workflows have been part of many SharePoint versions. They provide a way to automate processes in SharePoint. You can create workflows with a variety of tools but the one that will be examined here is using SharePoint Designer. For greater control and flexibility over workflow creation a tool like Visual Studio is required but that carries its own knowledge investment that IT Professionals may not be able to make. SharePoint Designer is therefore a good compromise to allow a greater level of automation without the need for fully blown code development.

I note that I have received feedback that some of the formats of these eBooks can be inferior on certain reading devices. This is more a limitation of those devices and the format unfortunately. However, if you purchase a copy of this eBook in a format that you believe is inferior to a high quality PDF all you need to do is provide me proof of your purchase via email and I will make available to you a high quality PDF copy of this book for free.

Remember that you can also always send me feedback, comments and suggestions on the book and what you would like to see included upcoming editions. I welcome any input on how this book can be improved.

Again, I thank you for your purchase and wish you every success with SharePoint and Office 365.

Robert Crane – director@ciaops.com
1st July 2014

Index

About

Author - Robert Crane BE MBA MCP

Robert has a degree in Electrical Engineering as well as Masters of Business Administration. He is also a Small Business Specialist and Microsoft Certified SharePoint Professional. Robert has over 15 years of IT experience in a variety of fields and positions, including working on Wall St in New York. In 2012 and 2013 he was recognized with a Microsoft Most Valuable Professional (MVP) Award for his work with Office 365. He continues his involvement with information technology as the Principal of the Computer Information Agency. Apart from resolving client technical issues, Robert continues to present at seminars as well as write on a number for topics for the Computer Information Agency including being involved in the SMB community in Sydney. Robert can be contacted via director@ciaops.com.

Company – Computer Information Agency (www.ciaops.com)

Founded in 1995, the Computer Information Agency is a specialized technology consultancy in Sydney, Australia that focuses on assisting businesses and individuals improve their productivity using technology and smart business practices. The Computer Information Agency has high levels of experience in technologies such as Windows Servers, including Small Business Server, and desktop applications such as Outlook, Word, Excel and Onenote.

With special emphasis placed on the business benefits of technology the Computer Information Agency is unique in its ability to work with companies to improve and streamline their processes utilizing the technology they already have in place. The focus is on providing an improved end result for the business which in the long run leads to greater productivity and profitability. More information about the Computer Information Agency can be found at http://www.ciaops.com.