Workflows

SharePoint workflows are programmed applications that streamline and automate business process. They can range from collecting signatures, feedback, or approvals on documents.

Add a workflow to a list

1. From the Site page, select the Settings icon.
2. From the Settings drop-down, select Site Contents.
3. Locate the Contents area.
4. Next to the appropriate list name, select the More icon.
5. Select Settings.
6. Under Permissions And Management, select Workflow Settings.
7. Click Add A Workflow.
8. From the Run On Items Of This Type drop-down, select This List.
9. In the Select A Workflow Template list box, select the appropriate option.
10. In the Enter A Unique Name For This Workflow field, enter the appropriate name.
11. Note: A new task list will be created for the workflow.
12. In the Task List area, select the Select A Task List drop-down.
13. From the Select A Task List drop-down, select the appropriate option.
14. In the History List area, select the appropriate history list.
15. In the Start Options area, select the appropriate checkboxes.
16. Click OK.

Remove a workflow

1. From the Site page, select the Settings icon.
2. From the Settings drop-down, select Site Contents.
3. Locate the Contents area.
4. Next to the appropriate app, select the More icon.
5. Select Settings.
6. Under Permissions And Management, select Workflow Settings.
7. Select Remove, Block Or Restore A Workflow.
8. Next to the appropriate workflow, select the Remove radio button.
9. Click OK.

Restore a workflow

1. After a workflow has been blocked, it can be undone by restoring the workflow.
2. From the Site page, select the Settings icon.
3. From the Settings drop-down, select Site Contents.
4. Locate the Contents area.
5. Next to the appropriate app, select the More icon.

If you need more help, please reach out to your division's FSSA Super User or send an email to SharepointRequests@fssa.in.gov with a description of your issue.

6. Click Settings.
7. Under Permissions And Management, select Workflow Settings.
8. Select Remove, Block Or Restore A Workflow.
9. Next to the appropriate workflow, select the Allow radio button.
10. Click OK.

Block a workflow

1. Workflow settings can be blocked so that new instances cannot be started. This way, workflows that are already in progress can be finished, but no new ones can begin.
2. From the Site page, select the Settings icon.
3. From the Settings drop-down, select Site Contents.
4. Locate the Contents area.
5. Next to the appropriate app, select the More icon.
6. Select Settings.
7. Under Permissions And Management, select Workflow Settings.
8. Click Remove, Block Or Restore A Workflow.
9. Next to the appropriate workflow, select the No New Instances radio button.
10. Click OK.

See all your flows

1. In the left navigation pane, select the appropriate list name.
2. From the list bar, select the Flow dropdown.
3. From the Flow drop-down, select See Your Flows.