

Add or change a workflow for a list, library, or content type

Workflows must be added to a list, library, or content type to make them available for use on documents or items.

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What types of workflows are available?

Microsoft Office SharePoint Server 2007 includes several predefined workflows that are designed to support common business processes, but your organization may also create and deploy custom workflows.

Predefined workflows

The predefined workflows in Office SharePoint Server 2007 address a variety of common business processes. If these workflows are activated for your site collection, you can [add the workflows to a list, library, or content type](#). Several of the predefined workflows, such as the Approval, Collect Feedback, and Collect Signatures workflows, are preassociated with the Document content type, which means that they are automatically available in document libraries.

For more information about how to work with each of these predefined workflows, see the links in the **See Also** section.

Custom workflows

If your organization needs additional workflows, these must be installed and enabled for your site by a server administrator.

There are two ways in which custom workflows can be created for Office SharePoint Server 2007:

- **Professional software developers can create workflows by using the Visual Studio 2005 Extensions for Windows Workflow Foundation** These workflows contain custom code and workflow activities. After a professional developer creates custom workflows, a server administrator can deploy them across multiple sites.
- **Web designers can design no-code workflows for use in a specific list or library by using a Web design program, such as Microsoft Office SharePoint Designer 2007** These workflows are created from a list of available workflow activities, and the Web designer who creates the workflow can deploy the workflows directly to the list or library where they will be used.

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How workflow association impacts workflow availability

Although a no-code workflow that was created in Microsoft Office SharePoint Designer 2007 can be deployed directly to the list or library where it will be used, any custom workflow installed on the server must be added to a list, library, or content type to make it available for documents or items in a specific location. You must have the Manage Lists permission to add a workflow to a list, library, or content type. In most cases, site administrators or individuals who manage specific lists or libraries perform this task.

The availability of a workflow within a site varies, depending on where it is added:

- If you add a workflow directly to a list or library, it is available only for items in that list or library.
- If you add a workflow to a list content type (an instance of a site content type that was added to a specific list or library), it is available only for items of that content type in the specific list or library with which that content type is associated.
- If you add a workflow to a site content type, that workflow is available for any items of that content type in every list and library to which an instance of that site content type was added. If you want a workflow to be widely available across lists or libraries in a site collection for items of a specific content type, the most efficient way to achieve this result is by adding that workflow directly to a site content type.

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Add or change a workflow for a list, library, or content type


Before you try to add a workflow, contact your server administrator to determine what workflows are installed and enabled for your site. For more information about how to add or change one of the

predefined workflows that are included in Office SharePoint Server 2007, see the links in the **See Also** section.


When you add a workflow to a list, library, or content type, you can customize the workflow for its specific location by specifying various options:

- The name of this instance of the workflow
- The task list where workflow-related tasks are stored
- The history list that records all of the events that are related to the workflow
- How you want the workflow to be started
- Additional options that are specific to the individual workflow (For example: how tasks are routed to participants, what circumstances complete the workflow, and what actions occur after the workflow is successfully completed.)

To add a new workflow to a list, library, or content type or to change the settings for a workflow that is already associated with a list, library, or content type, you follow the same steps.

1. To open the Add a Workflow page or the Change a Workflow page for the list, library, or content type for which you want to add or change a workflow, do one of the following:
 - For a list or library:
 1. Open the list or library for which you want to add or change a workflow.
 2. On the **Settings** menu , click **List Settings**, or click the settings for the type of library that you are opening.


For example, in a document library, click **Document Library Settings**.

3. Under **Permissions and Management**, click **Workflow settings**.
- For a list content type:
 1. Open the list or library that contains the instance of the list content type for which you want to add or change a workflow.
 2. On the **Settings** menu , click **List Settings**, or click the settings for the type of library that you are opening.

For example, in a document library, click **Document Library Settings**.

3. Under **Content Types**, click the name of the content type.

Note If the list or library is not set up to allow multiple content types, the **Content Types** section does not appear on the **Customize** page for the list or library.

4. Under **Settings**, click **Workflow settings**.
 - For a site content type:
 1. On the home page for the site collection, on the **Site Actions** menu , point to **Site Settings**, and then click **Modify All Site Settings**.
 2. Under **Galleries**, click **Site content types**.
 3. Click the name of the site content type for which you want to add or change a workflow, and then click **Workflow settings**.

Note If workflows have already been added to this list, library, or content type, this step takes you directly to the Change Workflow Settings page, and you need to click **Add a workflow** to go to the Add a Workflow page. If no workflows have been added to this list, library, or content type, this step takes you directly to the Add a Workflow page.

2. On the Change Workflow Settings page, click **Add a workflow** or click the name of the workflow for which you want to change the settings.
3. Do one of the following:
 - If you are adding a workflow, on the Add a Workflow page, in the **Workflow** section, click the name of the workflow template that you want to use.
 - If you are changing the settings for a workflow, on the Change a Workflow page, change the settings that you want to change according to the following steps.
4. In the **Name** section, type a unique name for the workflow.
5. In the **Task List** section, specify a tasks list to use with this workflow.

Notes

- You can use the default **Tasks** list or you can create a new one. If you use the default **Tasks** list, workflow participants will be able to find and view their workflow tasks easily by using the **My Tasks** view of the **Tasks** list.
 - If the tasks for this workflow will reveal sensitive or confidential data that you want to keep separate from the general **Tasks** list, you should create a new tasks list.
 - If your organization will have numerous workflows or if workflows will involve numerous tasks, you should create a new tasks list. In this instance, you might want to create tasks lists for each workflow.
6. In the **History List** section, select a history list to use with this workflow. The history list displays all of the events that occur during each instance of the workflow.

Note You can use the default **History** list or you can create a new one. If your organization will have numerous workflows, you might want to create a separate history list for each workflow.

7. In the **Start Options** section, specify how, when, or by whom a workflow can be started.

Notes

- Specific options may not be available if they are not supported by the workflow template that you selected.
 - The option **Start this workflow to approve publishing a major version of an item** is available only if support for major and minor versioning is enabled for the library and if the workflow template that you selected can be used for content approval.
8. If you are adding this workflow to a site content type, specify whether you want to add this workflow to all content types that inherit from this content type in the **Update List and Site Content Types** section.

Note The **Update List and Site Content Types** section appears on the Add a Workflow page only for site content types.

9. If there are additional customization options available for your workflow, click **Next**, and then specify the options that you want on the Customize page for your workflow.

For more detailed information about how to customize each of these predefined workflows, see the links in the **See Also** section.

10. If there are no additional customization options available for your workflow, click **OK**.

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