Use a Collect Feedback workflow

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The Collect Feedback workflow routes a document or item that is saved to a list or library to a group of people to collect their review feedback. By default, the Collect Feedback workflow is associated with the Document content type and it is thus automatically available in document libraries.

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How does the Collect Feedback workflow work?

The Collect Feedback workflow supports business processes that involve sending a document or item to a group of people to collect review feedback. The Collect Feedback workflow makes a review business process more efficient by managing and tracking all of the human tasks involved with the process. After it is completed, the Collect Feedback workflow consolidates all of the feedback from reviewers for the workflow owner and it provides record of the review process.

If workflows are available, you can start a Collect Feedback workflow directly from a document or item in a list or library. To start a workflow, you select the workflow that you want to use, and then you fill out a workflow initiation form that specifies the workflow participants (reviewers), a due date, and any relevant task instructions. After a workflow starts, the server assigns tasks to all participants. If e-mail alerts are enabled for the server, the server also sends e-mail alerts to all participants . Participants can click a link in the e-mail task alert to open the document or item to be reviewed. Participants can make changes or insert comments directly in the document. In the task form, they can provide feedback comments. They can also reassign their review tasks or request a change to the document or item to be reviewed. Participants have the option of completing their workflow tasks from either the Microsoft Office SharePoint Server 2007 Web site or from directly within certain programs that are part of the 2007 Microsoft Office system. While the workflow is in progress, the workflow owner or the workflow participants can view the Workflow Status page to see which participants have completed their workflow tasks. When the workflow participants complete their workflow tasks, the workflow ends, and the workflow owner is automatically notified that the workflow is complete.

By default, the Collect Feedback workflow is associated with the Document content type and it is thus automatically available in document libraries. The default Collect Feedback workflow for document libraries is a parallel workflow in which tasks are assigned to all participants at the same time. You can customize this preassociated version of the Collect Feedback workflow to meet the needs of your organization, or you can add a completely new version of the Collect Feedback workflow to a list, library, or content type.

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

Before a workflow can be used, it 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.

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

If you want to add a Collect Feedback workflow to a list, library, or content type, or if you want to change a Collect Feedback 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 **Collect Feedback** workflow template.

- 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. Click **Next**.
10. On the Customize Workflow page, specify the options that you want for how tasks are routed, the default workflow start values, how the workflow is completed, and what actions happen when the

workflow is successfully completed.

Select options in any of the following sections. You are not required to specify options in every section:

Workflow Tasks

To	Do this
Assign tasks to all participants at once (parallel workflow)	Select the **All participants simultaneously (parallel)** button.
Assign tasks to one participant at a time (serial workflow) If you make the workflow a serial workflow, one participant must complete a task before the next participant receives a task	Select the **One participant at a time (serial)** button.
Allow workflow participants to reassign their tasks to other people	Select the **Reassign the task to another person** check box.
Allow workflow participants to request a change to the document or item to be approved before completing a task	Select the **Request a change before completing the task** check box.

Default Workflow Start Values

To	Do this
Specify a default list of participants for all instances of this workflow	Type the names of people who you want to participate when this workflow is started, or click **Reviewers** to select people and groups from the directory service. **Note** If you set up this workflow as a serial workflow, add the names of the workflow participants in the order in which you want the tasks to be assigned.

	Select the **Assign a single task to each group entered (Don't expand groups)** check box.
Assign a single tasks to groups	Select this option if you plan to specify groups as workflow participants, and you want only one task to be assigned to the group instead of individual tasks for every group member.
Allow people who start the workflow to change or add participants	Select the **Allow changes to the participant list when this workflow is started** check box. This option is selected by default. If you want to prevent people who start the workflow from being able to change or add participants, clear this check box.
Specify a default message that appears with each task	Type a message or instructions in the text box.
Specify a due date for parallel workflows	Type or select a date under **Tasks are due by (parallel)**.
Specify how long serial workflow participants have to complete workflow tasks	Under **Give each person the following amount of time to finish their task (serial)**, type a number, and then select either **Day(s)** or **Week(s)** as the increment of time.
Specify a list of people who should receive alerts (not task assignments) when the workflow is started	Under **Notify Others**, type the names of the people you want to be notified, or click **CC** to select people and groups from the directory service.

Complete the Workflow

To	Do this
Specify that a parallel workflow is complete when a specific number of participants complete their tasks	Select the **Following number of tasks are finished** check box, and then type a number. **Note** This option is not available if your workflow is a serial workflow.

Specify that a workflow is complete when the document or item is rejected	Select the **Document is rejected** check box.
Specify that a workflow is complete when the document or item is changed	Select the **Document is changed** check box.

Post-completion Workflow Activities

To	Do this
Update the approval status for a document or item after the workflow is complete	Select the **Update the approval status (use this workflow to control content approval)** check box. Select this option if you want to this workflow to manage content approval and you also selected the **Start this workflow to approve publishing a major version of an item** check box on the Add a Workflow page.

11. Click **OK**.

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Start a Collect Feedback workflow on a document or item

You can manually start a Collect Feedback workflow on a document or item directly from the list or library where it is saved. The options available to you when you start the workflow may vary depending on how that workflow was customized when it was added to the list, library, or content type for the item. You must have at least the Edit Items permission to start a workflow. Some workflows may require that you also have the Manage Lists permission to start a workflow on an document or item.

Note If you want to ensure that workflow participants receive e-mail alerts and reminders about their workflow tasks after you start a workflow, check with your server administrator to verify that e-mail is enabled for your site.

1. If the list or library is not already open, click its name on the Quick Launch.

   If the name of your list or library does not appear, click **View All Site Content**, and then click the name of your list or library.

2. Point to the name of the document or item for which you want to start a workflow, click the

arrow that appears, and then click **Workflows**.

3. Under **Start a New Workflow**, click the name of the Collect Feedback workflow that you want to start.
4. Type the names of the people you want to review the document or item on the **Reviewers** line, or click **Reviewers** to select people and groups from the directory service.

   Note If your workflow is a serial workflow, type or select the names of the workflow participants in the order in which you want the tasks to be assigned.

5. If you are including groups as workflow participants, select the **Assign a single task to each group entered (Do not expand groups)** check box if you want only one task notification to be assigned to the group instead of individual task notifications for every group member.
6. If you want to include a message or specific task instructions, type this information in the text box under **Type a message to include with your request**.
7. To specify when the task should be completed, under **Due Date**, do one of the following:
   - For a serial workflow, type a number, and then select either **Day(s)** or **Week(s)** as the increment of time.
   - For a parallel workflow, type or select a date under **Tasks are due by**.
   - If you want other people to receive notifications (not task assignments) when the workflow is started, type their names on the **CC** line, or click **CC** to select people and groups from the directory service.
8. Click **Start**.

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Complete a Collect Feedback workflow task

Participants in an Collect Feedback workflow can complete their workflow tasks from either the list or library where the item or document is located or from directly within certain programs that are part of the 2007 Office release. For information about how to complete a workflow task in a client program, see the Help for that program.

Complete a Collect Feedback workflow task on the server

1. Go to the **Tasks** list for the site, and then select **My Tasks** on the **View** menu to locate your workflow task.

   Note If the workflow does not use the default **Tasks** list, then your workflow task may not appear in the **Tasks** list. To locate your workflow task, open the list or library where the workflow item is saved. Point to the item that you want, click the arrow that appears, and then click **Workflows**. Under **Running Workflows**, click the name of the workflow in which you are a participant. On the Workflow Status page, under **Tasks**, locate your workflow task.

2. Point to the name of the task that you want to complete, click the arrow that appears, and then click **Edit Item**.
3. Do one of the following:
   - To read or view the contents of the document or item, click the link to the item that displays at the top of the task form.

     If you add comments or make changes directly in the document, be sure to save your changes to the server.

   - To provide feedback comments to the workflow owner, type your feedback in the text box that is provided, and then click **Send Feedback**.
   - To reassign the review task to another person, click **Reassign task**, specify to whom you want to assign the task, and then click **Send**.
   - To request a change to the item, click **Request a change**, specify to whom you want to assign the change request, provide information about the change requested, and then click **Send**.

     Note Depending on how the workflow was customized when it was added to the list, library, or content type for this item, the options to reassign the task or request a change may not be available.

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