

Setting up an Approve/Reject Workflow with FormsViewer

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Overview

This document outlines the steps to set up a workflow in SharePoint that will send form approvers e-mails in which they can click an Approve or Reject link to automatically approve or reject a form with FormsViewer.

It also provides a simple overview of the key features in the sample form provided with this document and a broad overview of the steps leading up to the configuration of the workflow.

Initial Preparation

1. Modify your InfoPath form to contain the Approval/Rejection features in the sample form provided with this document. The **Overview of the Approve/Reject Sample Form** section of this document provides more information about how the form works, but at a high level, what the form will need is:
 - a. qRules
 - b. Rules that execute when qRules finishes loading to check for an approval input parameter and act accordingly.
 - c. Functionality to submit to a SharePoint library.
2. Publish the InfoPath form to a library in SharePoint (you may need to do this before adding a SharePoint submit connection to you form).
3. Upload the form to the Manage Templates page in FormsViewer.
4. **Optional:** Follow the instructions in the document Configure Links in a Library to Open in FormsViewer to allow opening new and existing in FormsViewer.

Create the Approve/Reject E-mail Workflow

1. Ensure that you have SharePoint Designer 2013 installed on your computer.
2. Open SharePoint Designer 2013.
3. Click **Open Site** and open the site containing the form's library.
4. In the sidebar, click **Lists and Libraries**.
5. In the center pane, click the name of your library.
6. In the **New** section of the ribbon, click **List Workflow**.
7. Give the workflow a meaningful name like *Approval E-mail* and click OK.
8. In the ribbon, click **Action** → **Send an Email**.
9. Click the *these users* text in the newly added action.
10. In the **To:** line, click the button to open up a user selection dialog.
 - a. Use the dialog to select who should get the approval e-mail. You can use a fixed value, or use *Workflow Lookup for a User...* to use a column from library item.
11. In the **Subject:** field, add the subject you would like the e-mail to have, such as "An item requires your approval." If desired, you can use a formula to construct the subject.
12. Add whatever content you would like in the body of the e-mail. You will typically want to use **Add or Change Lookup** to include library columns and display relevant information about the request.
13. At some place in the body text, include an *Approve* link:
 - a. Place your cursor where you would like to add the link.
 - b. Click the hyperlink icon to open the hyperlink dialog.
 - c. For **Text to Display**, type *Approve*.
 - d. For **Address**, click the ellipsis (...) button to open the String Builder dialog.
 - e. In a browser, open the main page for your FormsViewer app (the page that has Manage Credentials and Manage Templates links at the top).
 - f. Copy the page's URL from the browser Address bar to the String Builder dialog.
 - g. After the */FormsViewer* toward the beginning of the URL, add the text */View*, so that it now shows */FormsViewer/View*
 - h. If the URL contains the text *&SPHasRedirectedToSharePoint=1* at the end, delete this portion of the URL.
 - i. At the end of the URL, type *&document=*
 - j. Click *Add or Change Lookup*, and add Current Item -> Server Relative URL.
 - k. At the end of the URL, type *&status=approve*
 - l. Click OK to close the String Builder dialog.
14. Near the *Approve* link, add a *Reject* link.
 - a. Repeat step 13, this time using *Reject* as the link text, and using *&status=reject* in step k.
15. Click OK to close the Define E-mail Message.
16. Click within the **Transition to stage** portion of the workflow to put your cursor there.
17. Click the **Action** button in the ribbon, and click **Go to a stage**.
18. Click the *a stage* text and select **End of Workflow**.
19. In the ribbon, click Workflow Settings.
20. Under Start Options, check **Start workflow automatically when an item is created**.
21. In the ribbon, click Publish to publish the workflow.

To Use the Form

Obtain a link to open the form from the Manage Templates page of FormsViewer and provide this to your users. They can use this link to open the form and submit requests. When a request is submitted, the workflow created in the previous section should send an e-mail to the approver with links to approve or reject the request. Clicking either link should approve or reject the request.

Overview of the Approve/Reject Sample Form

This section describes some of the key features of the XSN included with this document that allow it to perform approvals and rejections:

- The form contains an **Approver** field to store the e-mail address of the approver. This field is set up as a promoted property so that it is available as a library column and so that the workflow can access it.
 1. For simplicity, this field is set up as a textbox in the form's view, but typically in practice, the approver would be determined through some form logic.
 2. If the form's approver is always the same person or e-mail address, or you would like the e-mail workflow to determine the approver externally to the form, you can omit this field.
- The form contains a Submit data connection to a SharePoint library where the form is published and where the workflow is set up.
- The form uses conditional formatting to hide certain editable fields when the form's status is nonblank.
- The form has a **FormName** field to keep track of the file name initially used to submit the form. This is optional if you have some alternative way of determining the form name.
- The form has a **Request** field simply as an example of a field that a user might enter when requesting approval for something.
- The **finishedLoading** field in the QdabraRules data source has rules to:
 1. Check whether an input parameter called **status** has been passed in, and
 2. If it has been passed in with a valid value and the form's status is blank, copy the provided value to the form's **Status** field, switch to a view that shows the user a message about their action, and submit the updated form to SharePoint.
- **Note:** It is a good idea to include form logic to ensure that the user accessing the form is allowed to perform approval on the form being accessed, e.g. by checking their identity with the `userName()` function. This has been omitted from the sample form for simplicity.