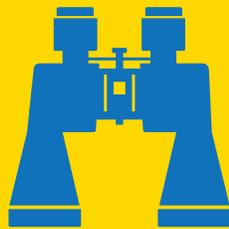




SUBMIT



MONITOR



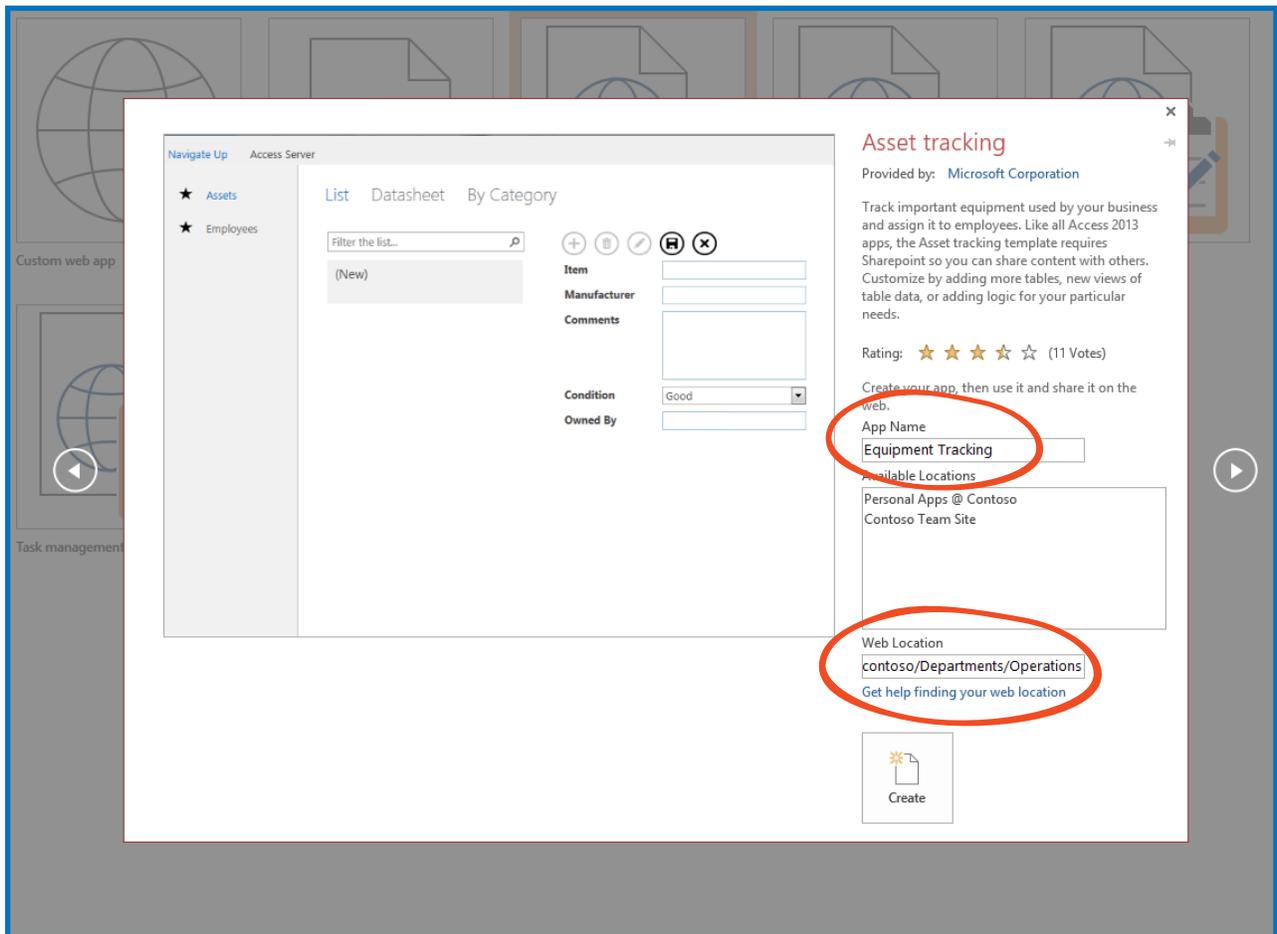
REPORT

Boost business
processes

Boost business processes



Now anyone can build an app for SharePoint.

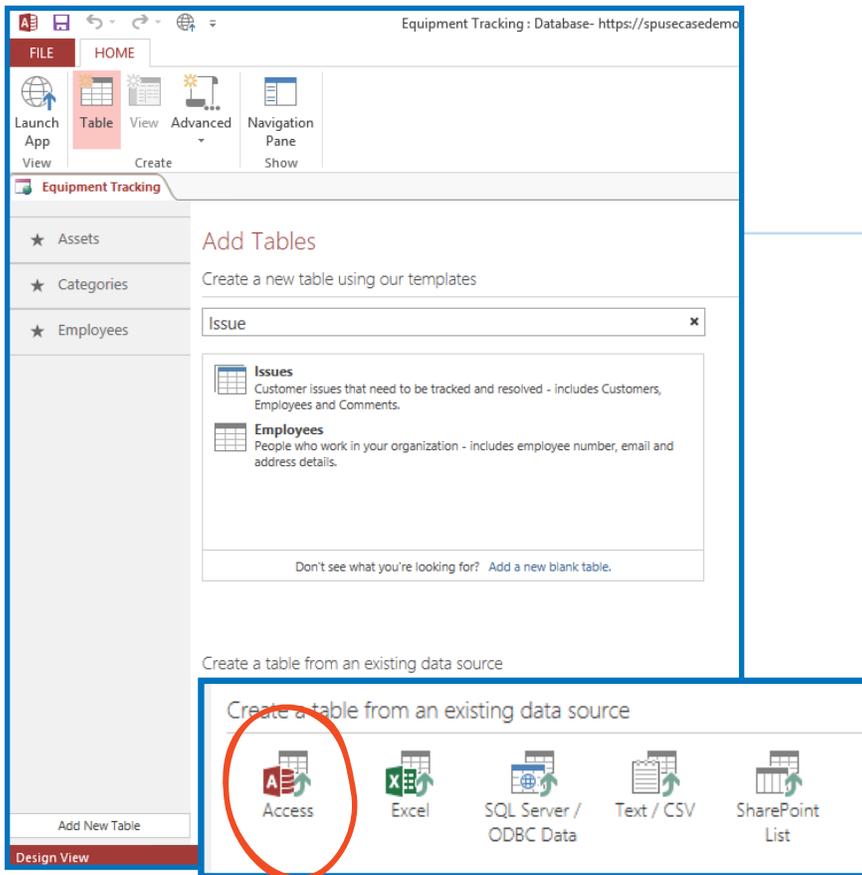


Start in Access 2013, and open the existing Asset tracking template. All you need to do is give the app a name and specify a site URL.

Add tables and components



Within Access, you can quickly search across your app to discover tables and other components.

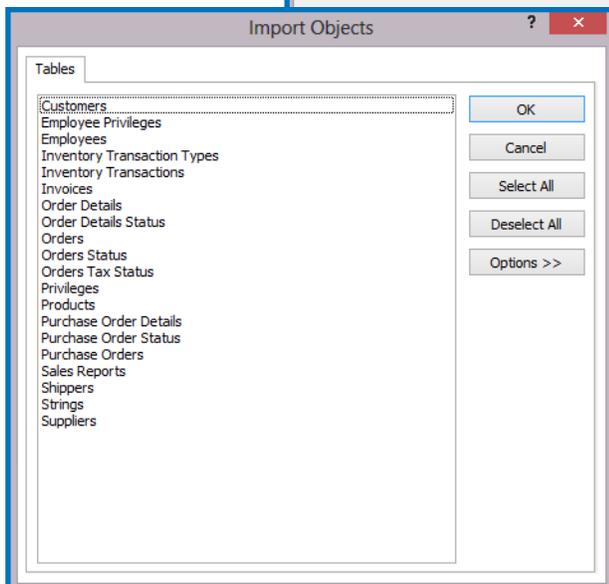
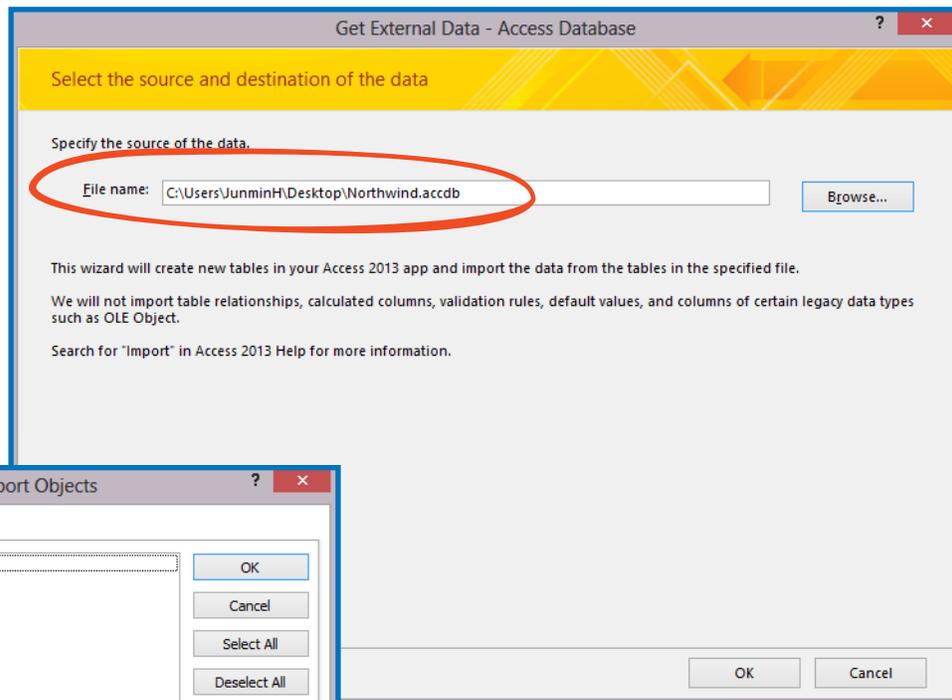


Here, you can pull in tables from an Access desktop application.

Link tables to the app



An external database has a number of tables that can be linked.

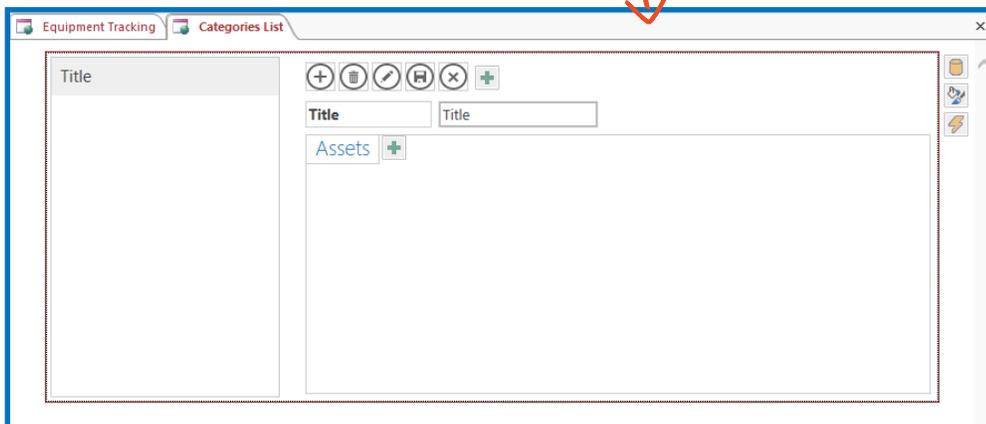
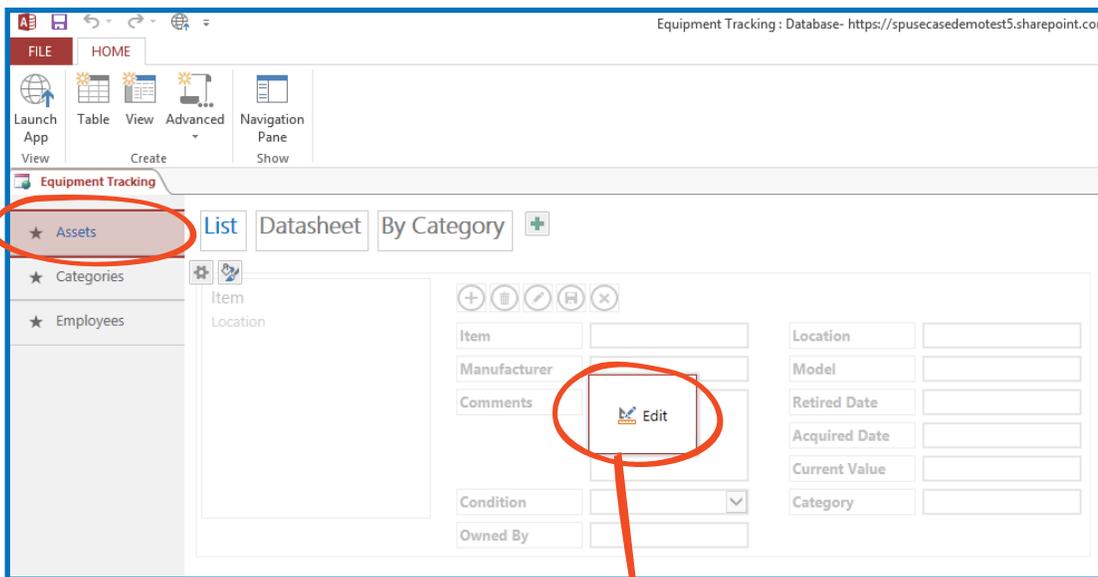


The tables are listed, and clicking OK includes them in the app.

Preview and edit tables



Let's check out some of the other components in our app. For starters, you can preview different forms by clicking on them in the left pane.



When editing a form, you can connect fields directly to SharePoint lists, so you can manage your data sources outside the app.

See your apps in action



Once you're done, save your changes and see how your app works in action.

Office 365 interface showing the 'Equipment Tracker' app highlighted in the navigation menu. The main content area displays 'Facility: Portland' with a newsfeed and documents list.

Contoso Equipment Tracker interface showing a list of equipment items. The interface includes a navigation sidebar and a main content area with a filter and action icons.

Item	Location	Manufacturer	Model	Retired Date	Acquired Date	Current Value	Condition	Owned By
CO Detector Locker Room C	Locker Room C	Northwind	CO-A1		12/1/2011	\$155.00	Good	Julian Isla
HVAC Portable Analysis Unit		Portable						
Respirator Locker Room A								
Safety Goggles Locker Room A								
Safety Goggles Locker Room B								

As you can see, this Equipment Tracker app already has data added to it.

View app data



The top navigation provides you with different ways of looking at the app data. The Datasheet shows all the items in a familiar tabular view, while By Category sorts them by type.

List **Datasheet** By Category

+ -

Item	Location	Manufacturer	Model	Comments	Retired Date	Acquired Date	Current Value	Condition	Category	Owned By
HVAC Portable		Northwind	HPA-12			7/1/2010	\$500.00	Good	HVAC	Julian Isla
Safety Goggles	Locker Room A	Northwind	SG-45a			8/1/2012	\$120.00	Good	Safety	Julian Isla
Safety Goggles	Locker Room B	Northwind	SP-34	Tinted		3/1/2013	\$150.00	Good	Safety	Julian Isla
Respirator	Locker Room A	Northwind	RS-1			3/1/2013	\$250.00	Good	Safety	Julian Isla
CO Detector	Locker Room C	Northwind	CO-A1	Portable		12/1/2011	\$155.00	Good	Safety	Julian Isla
							\$0.00	Good		

List Datasheet **By Category**

Filter the list... 🔍

		Item	Location	Current Value	Acquired Date
HVAC	(1)	CO Detector	Locker Room C	\$155.00	12/1/2011
		Respirator	Locker Room A	\$250.00	3/1/2013
Safety	(4)	Safety Goggles	Locker Room A	\$120.00	8/1/2012
		Safety Goggles	Locker Room B	\$150.00	3/1/2013

Track app data



Clicking a category item link opens a dialog box showing more details.

The screenshot shows a SharePoint list view titled "By Category". On the left, there are category filters: "HVAC (1)" and "Safety (4)". The main table lists assets with columns for Item, Location, Current Value, and Acquired Date. The first row, "CO Detector" in "Locker Room C" with a value of "\$155.00" and date "12/1/2011", is circled in red. A red arrow points from this row to a dialog box titled "Assets".

Item	Location	Current Value	Acquired Date
CO Detector	Locker Room C	\$155.00	12/1/2011
Respirator	Locker Room A	\$250.00	3/1/2013
Safety Goggles	Locker Room A	\$120.00	8/1/2012
Safety Goggles	Locker Room B	\$150.00	3/1/2013

Assets	
Item	CO Detector
Manufacturer	Northwind
Comments	Portable
Condition	Good
Owned By	Julian Isla
Location	Locker Room C
Model	CO-A1
Retired Date	
Acquired Date	12/1/2011
Current Value	\$155.00
Category	Safety

Explore app data



Clicking the Julian Isla link shows even more granular data.

Assets

+ - [edit] [refresh] [close]

Item	CO Detector	Location	Locker Room C
Manufacturer	Northwind	Model	CO-A1
Comments	Portable	Retired Date	
Condition	Good	Acquired Date	12/1/2011
Owned By	Julian Isla	Current Value	\$155.00
		Category	Safety

The app displays a full listing of Julian's information and assets.

Employees

+ - [edit] [refresh] [close]

Employee Num...	C641	First Name	Julian
Last Name	Isla	Company	Contoso
Email	juliani@spusecasede...	Job Title	Director
Work Phone	309-555-0101	Home Phone	
Mobile Phone		Address 1	2203 E. Empire St, Sui...
Address 2		City	Bloomington
State/Province	IL	ZIP/Postal Code	61704
Country/Region	United States	Office Location	19/2106
Department		Date of Hire	
Date of Birth		Emergency Con...	
Emergency Con...		Emergency Con...	
Web Page		Notes	
Group	Full-time		

Assets

Item	Location	Current Value	Acquired Date
CO Detector	Locker Room C	\$155.00	12/1/2011
HVAC Portable Analys...		\$500.00	7/1/2010
Respirator	Locker Room A	\$250.00	3/1/2013

Add data



Go to the List view to add new data to the app. You add data just as you would for a SharePoint list item—simply click the plus icon. Then when you're finished entering the data, finish up by clicking the save icon.

List Datasheet By Category

Filter the list... [Search] [+] [Trash] [Edit] [Save] [Close]

CO Detector Locker Room C	Item CO Detector	Location Locker Room C
HVAC Portable Analysis Unit	Manufacturer Northwind	Model CO-A1
Respirator Locker Room A	Comments Portable	Retired Date
Safety Goggles Locker Room A	Condition Good	Acquired Date 12/1/2011
Safety Goggles Locker Room B	Owned By Julian Isla	Current Value \$155.00
		Category Safety

List Datasheet By Category

Filter the list... [Search] [+] [Trash] [Edit] [Save] [Close]

CO Detector Locker Room C	Item CO Detector	Location Locker Room B
HVAC Portable Analysis Unit	Manufacturer Northwind	Model CO-A2
Respirator Locker Room A	Comments	Retired Date
Safety Goggles Locker Room A	Condition Good	Acquired Date
Safety Goggles Locker Room B	Owned By Julian Isla	Current Value \$175.00
CO Detector Locker Room B		Category Safety

SharePoint makes the data entry process easy—typing even one character gives you a list of suggestions for that field.

Create a Visio workflow diagram



Visio 2013 also has tight integration with SharePoint.

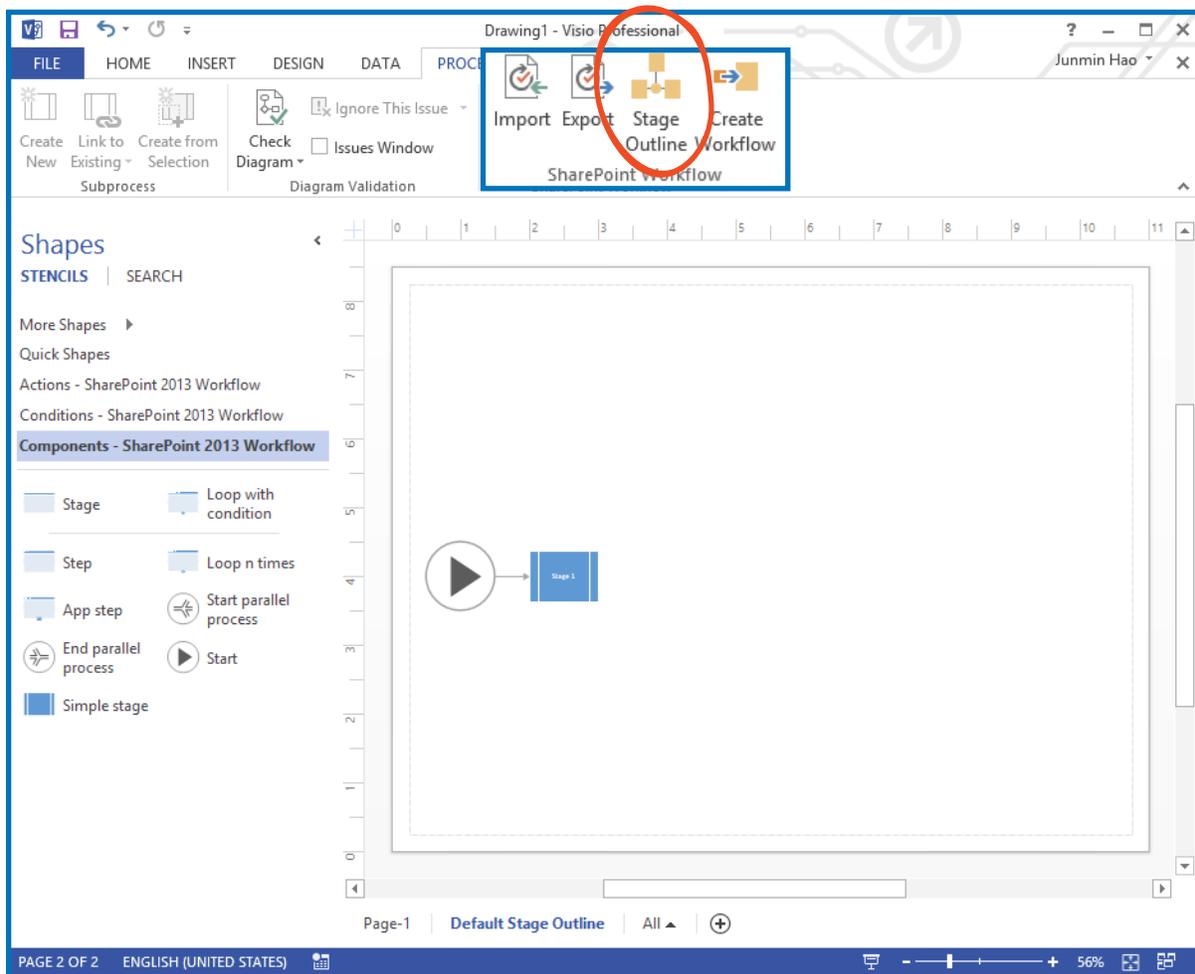
The screenshot displays the Visio 2013 interface. On the left is a sidebar with the 'Visio' logo and a 'Recent' list of workflow diagrams. The main area shows a gallery of templates under 'FEATURED' and 'CATEGORIES'. A red arrow points from the 'Microsoft SharePoint 2013 Workflow' template in the gallery to a larger, detailed view of the same template. This detailed view shows a workflow diagram with a start node, a decision diamond, and two paths leading to task rectangles. To the right of the diagram is a metadata panel for the 'Microsoft SharePoint 2013 Workflow' template, including the provider 'Microsoft Corporation', a description of its use for SharePoint Server 2013 and Foundation 2013, a download size of 9 KB, and a 'Create' button.

You can design advanced workflows, and import them directly into SharePoint Designer 2013.

Create a Stage Outline



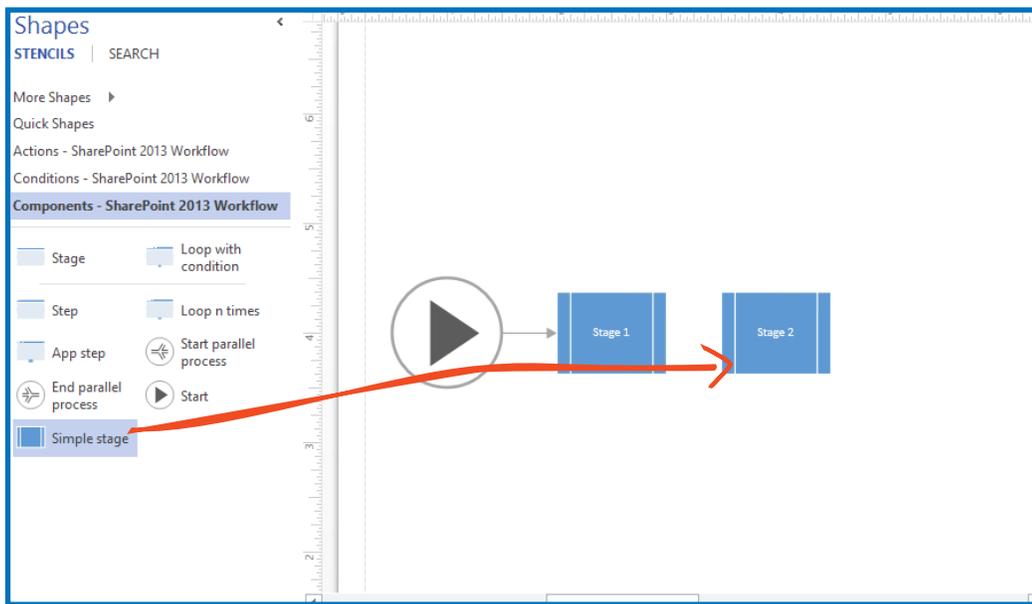
Diagram and plan the main flow of your business process in the Stage Outline.



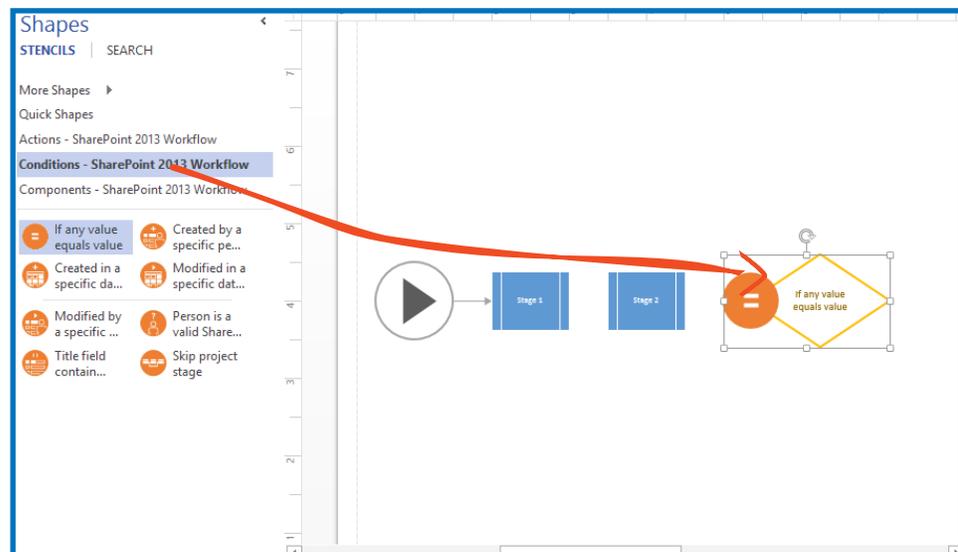
Set the stage



You can modify your workflow by dragging different components into the diagram from the Shapes pane.



Conditions allow you to use SharePoint list data for deciding when and how to execute actions.



Connect the dots



Connect shapes in your workflow using the Connector command from the Insert tab of the ribbon.

The screenshot displays the Microsoft Visio Professional (Trial) interface. The ribbon is set to the 'INSERT' tab, with the 'Diagram Parts' group selected. The 'Connector' command is highlighted with a red arrow. The main workspace shows a workflow diagram with a start shape (a circle with a play button), two rectangular task shapes labeled 'Stage 1' and 'Stage 2', and a diamond-shaped decision shape labeled 'If any value equals value'. The 'Shapes' task pane on the left shows various workflow shapes, including conditions and components. The status bar at the bottom indicates 'Page-1 | Default Stage Outline | All ▲ | + | 77%'.

Create a workflow with Visio



If you click Create Workflow from the Process tab in the ribbon, you can drill into each step of your process.

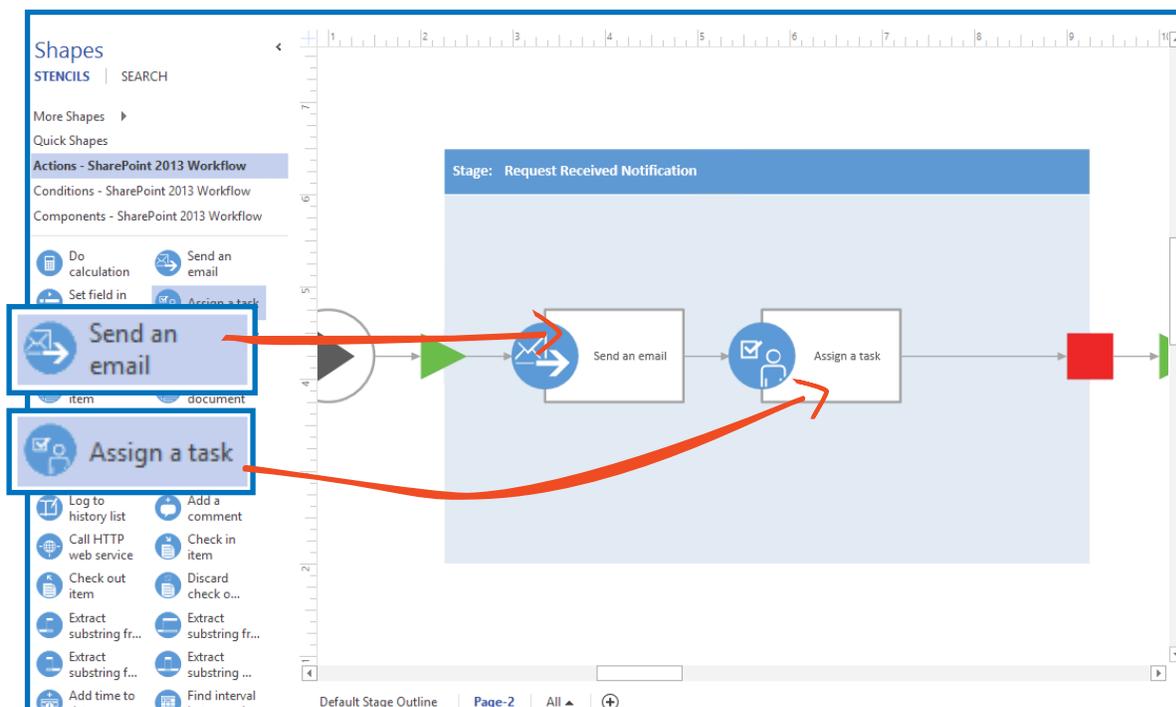
Default Stage Outline All + 77%

In the Shapes pane on the left, note the different actions you can add to the workflow.

Add workflow actions



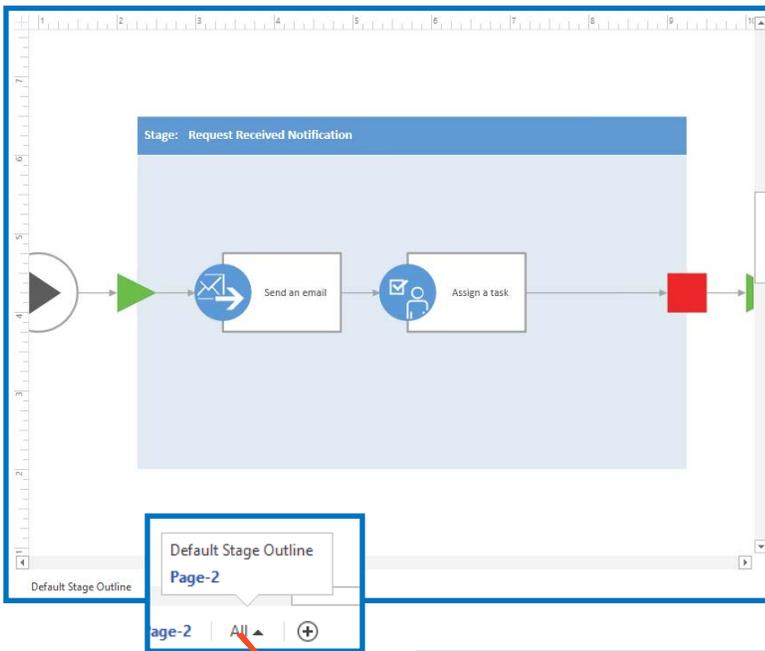
Adding actions to your workflow is a simple process—just click and drag the desired process into the appropriate stage.



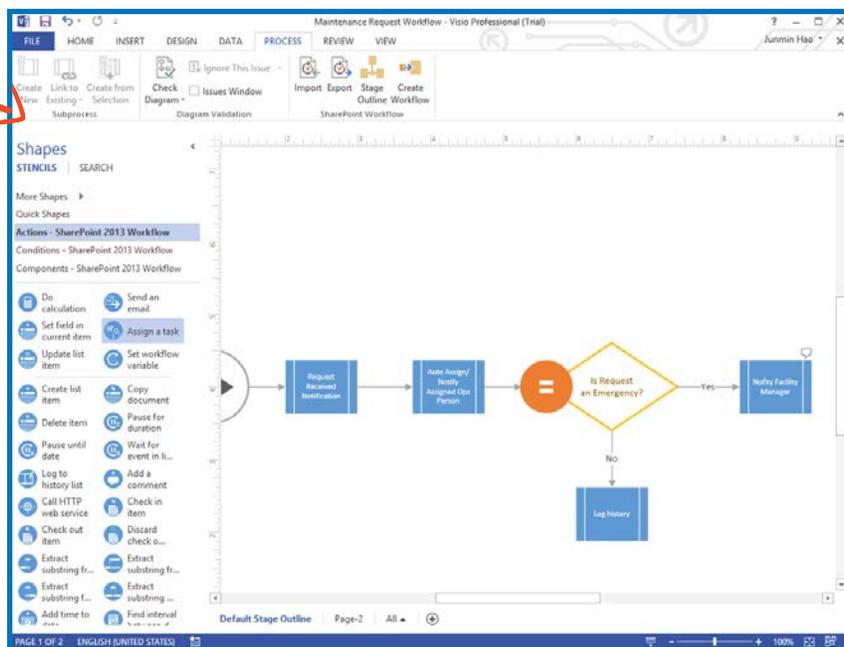
View the workflow



Switching between diagram views is easy as well.



Click the All option in the bottom of the diagram, and then pick Default Stage Outline to see a high-level flow of the process.



Add comments in the diagram



You can also easily associate comments with any of the components in the diagram.

The screenshot displays the Visio Professional (Trial) interface for a 'Maintenance Request Workflow'. The ribbon includes FILE, HOME, INSERT, DESIGN, DATA, PROCESS, REVIEW, and VIEW. The PROCESS ribbon is active, showing options like 'Check Diagram', 'Ignore This Issue', 'Issues Window', 'Import', 'Export', 'Stage Outline', and 'Create Workflow'. The left sidebar shows 'Shapes' with categories for 'Actions - SharePoint 2013 Workflow', 'Conditions - SharePoint 2013 Workflow', and 'Components - SharePoint 2013 Workflow'. The main canvas shows a workflow diagram with a task 'Auto Assign/ Notify Assigned Ops Person' leading to a decision diamond 'Is Request an Emergency?'. The 'Yes' path leads to 'Notify Facility Manager', and the 'No' path leads to 'Log history'. A comment box, circled in red, is overlaid on the 'Notify Facility Manager' task. The comment is from Junmin Hao, dated August 19, 2013, and asks 'Are we able to handle nights and weekends in this step?'. A 'Reply...' field is visible below the question. At the bottom, a 'Collaboration' pane shows 'Authors editing this document' with Julian Isla and Junmin Hao.

Connect with contributors through Lync



Check in with co-contributors using Lync messaging.

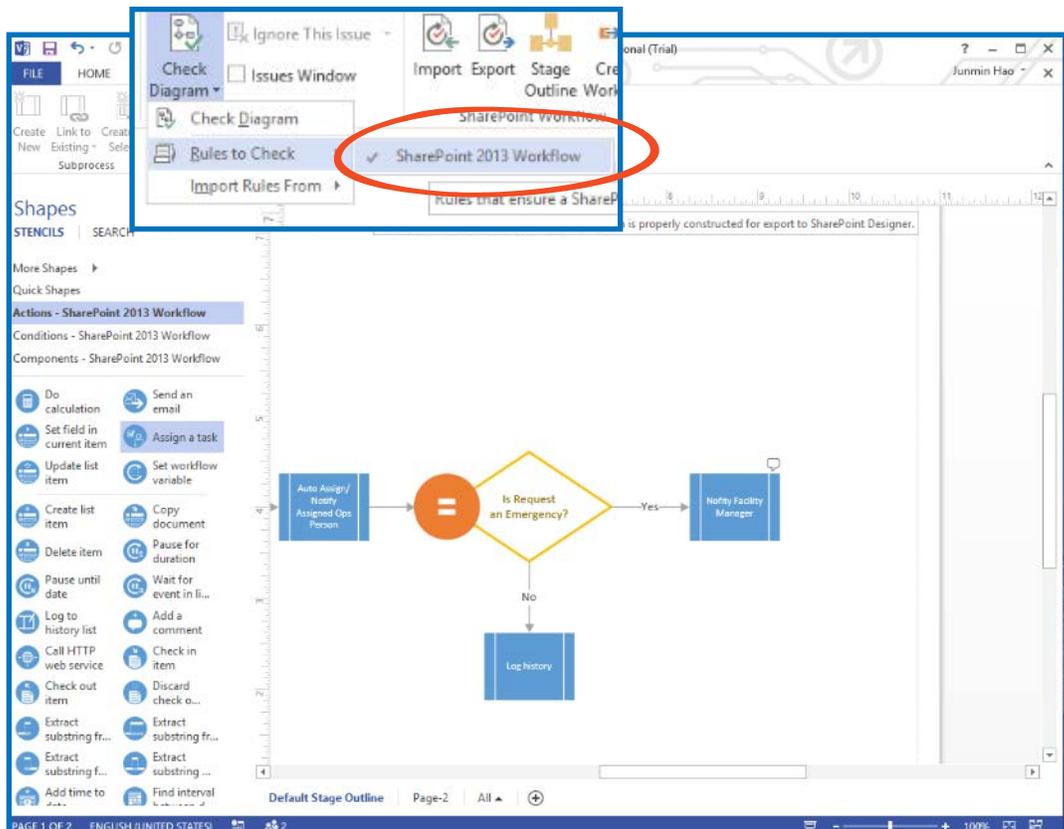
The screenshot displays a Lync chat window on the left and a Visio Professional (Trial) window on the right. The Lync chat window is titled 'Julian Isla - Maintenance Request Workflow' and shows a contact card for Julian Isla, Director, with status 'Available'. A message from Julian Isla asks, 'Are you working on the Auto-Assign stage?'. The chat window includes icons for chat, voice call, video call, screen sharing, and group chat. The Visio window shows a workflow diagram with the following steps: 'Request Requestor' (blue rectangle), 'Auto Assign Notify Requestor' (blue rectangle), 'Is Request an Emergency?' (yellow diamond), 'Notify Facility Manager' (blue rectangle), and 'Log History' (blue rectangle). A red arrow points from the Lync chat window to the Visio diagram, indicating the integration between the two applications.

Lync integration lets you quickly send instant messages directly from Visio.

Validate diagrams instantly



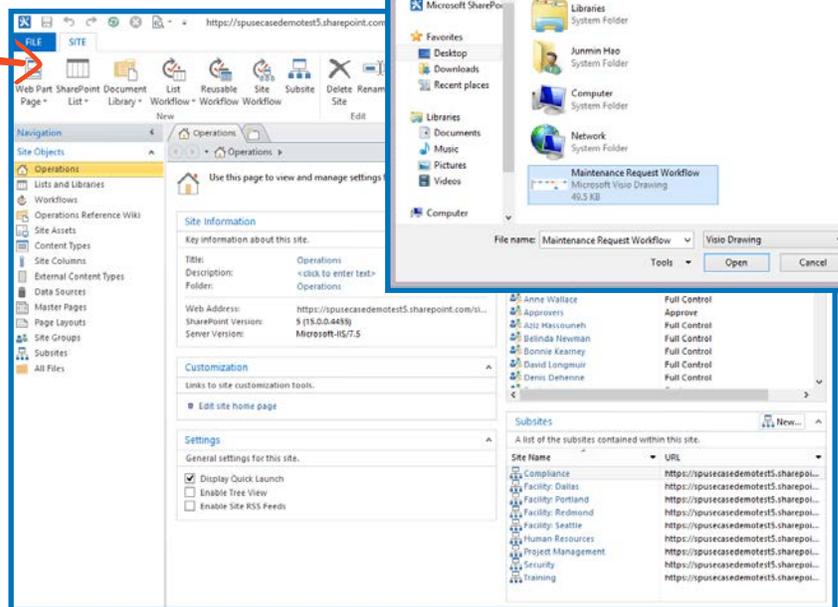
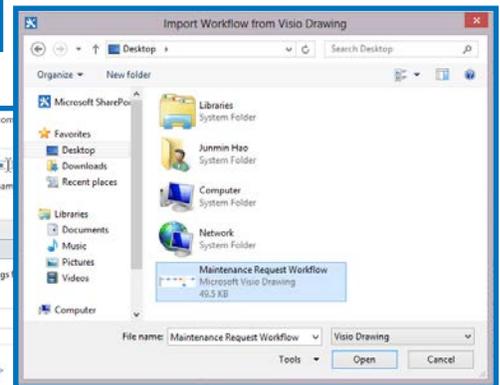
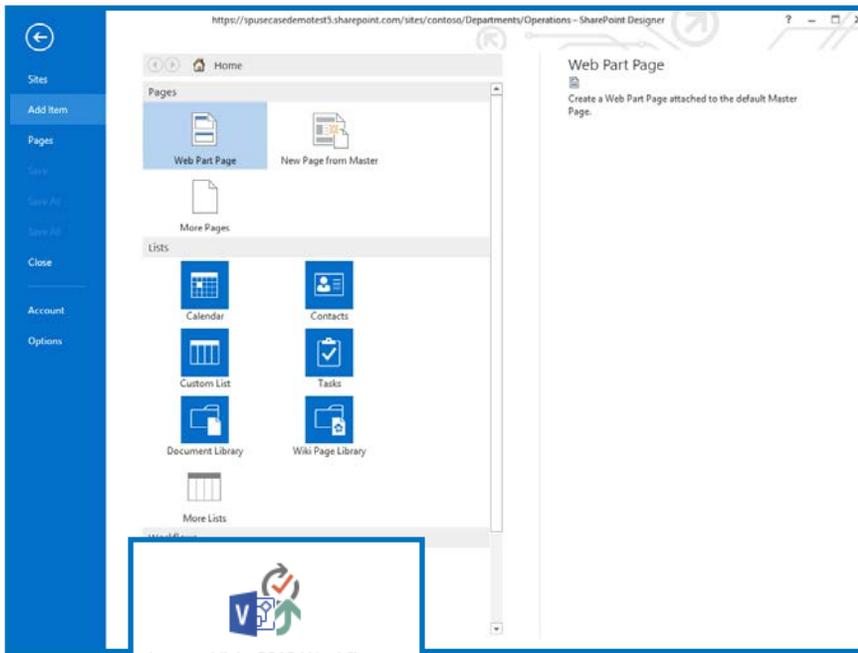
You can easily validate your diagram to make sure that it conforms to SharePoint 2013 workflow functionality.



Take advantage of SharePoint Designer 2013



Once you've finished most of the planning work in Visio 2013, import the workflow diagram into SharePoint Designer 2013.



This sets you up for deploying your workflow to SharePoint.

Create a workflow in Designer



You can associate your workflow with existing SharePoint lists.

The screenshot displays the SharePoint Designer interface for a site named 'Facility: Portland'. A 'Create Workflow' dialog box is open, allowing the user to configure a new workflow. The dialog includes the following fields and options:

- Enter a name and description for your new workflow:**
 - Name: Maintenance Request Workflow
 - Description: (empty)
- Select the type of workflow you would like to create:**
 - Workflow Type: List Workflow
- Select the SharePoint List you'd like your workflow associated with:**
 - SharePoint List: Maintenance Requests (highlighted with a red circle)

Buttons for 'OK' and 'Cancel' are located at the bottom right of the dialog.

Set condition triggers



Clicking the properties icon allows you to define stages in the Workflow diagram.

The screenshot shows the SharePoint Designer interface for a workflow named 'Maintenance Request Workflow'. The workflow diagram includes a start stage, an 'Auto Assign/Notify Assigned Ops Person' stage, a decision diamond 'Is Request an Emergency?', and a 'Notify Family Manager' stage. A context menu is open over the decision diamond, with 'Properties...' selected. Two dialog boxes are overlaid: 'If any value equals value Properties' and 'Define Workflow Lookup'. The 'Define Workflow Lookup' dialog shows 'Current Item' as the data source and 'Emergency?' as the field from source.

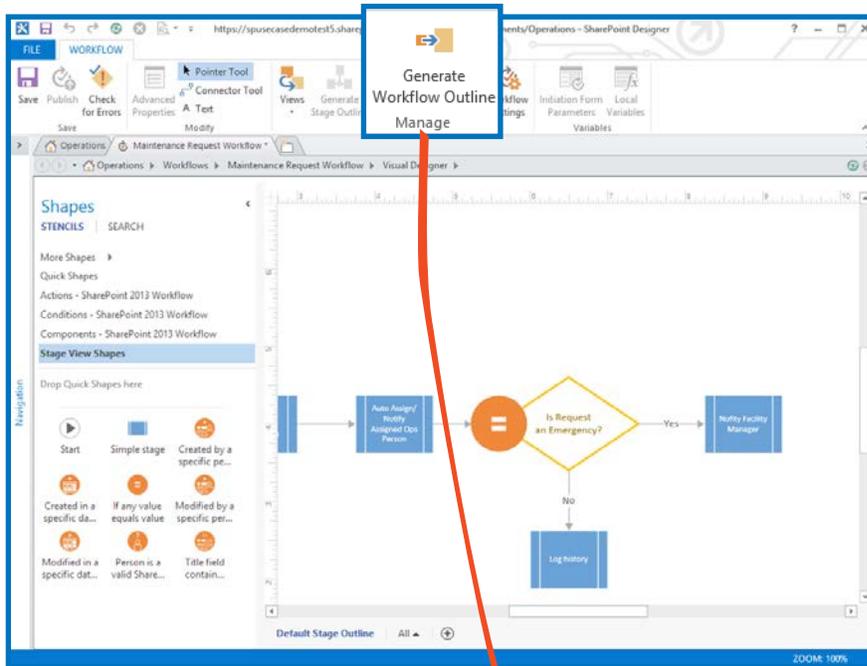
Since the Emergency field is a Boolean value, you can choose either Yes or No.

The dialog box 'If any value equals value Properties' shows the configuration for the condition. The 'Value' field is set to 'Current Item:Emergency?', the 'Operator' is 'equals', and the 'Value' field has radio buttons for 'Yes' and 'No'.

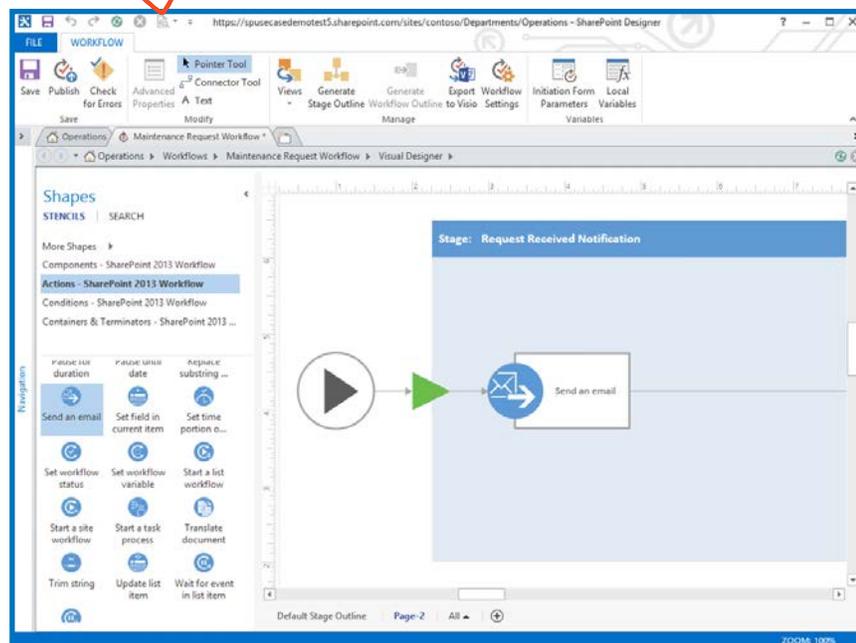
Generate a Workflow Outline



Generate Workflow Outline allows you to drill into each of the stages in your process.



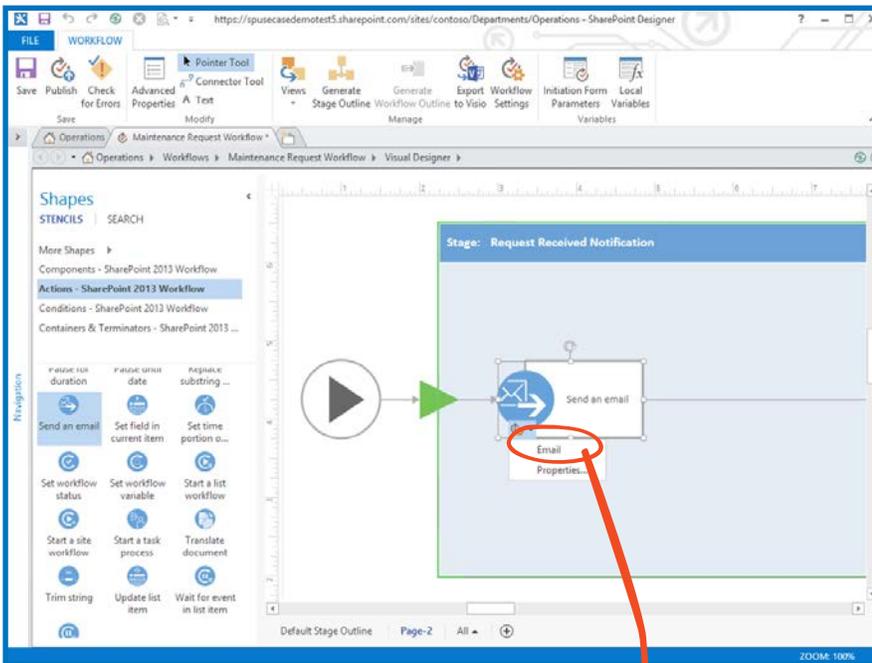
Again, in the Shapes pane several actions are available. Here we drag a Send an email action into the first stage.



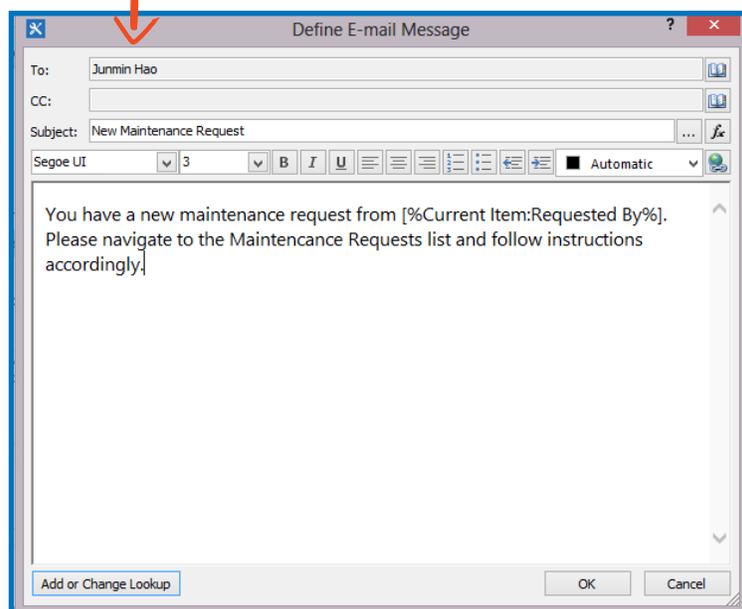
Generate an automatic email



The Send an email action can be configured to automatically notify the appropriate person when a new request is made.



The text entered in the body field will show up in the automatically generated email sent to the owner.



Publish to SharePoint



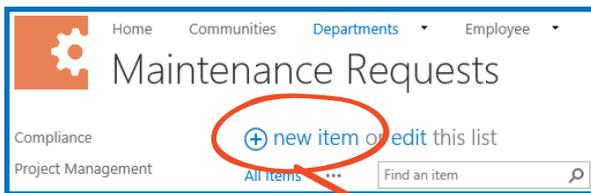
Once you are done adding all actions to the workflow, click Publish to deploy it to SharePoint.

The screenshot displays the SharePoint Designer interface for a workflow named 'Maintenance Request Workflow'. The 'Visual Designer' view shows a stage titled 'Request Received Notification' with a flow starting from a green arrow, passing through 'Send an email' and 'Assign a task' actions, and ending at a red square. The 'Publish' button is highlighted in the top-left corner of the interface. The left sidebar shows the 'Shapes' pane with various workflow actions available for selection.

Request maintenance



With the Workflow published to SharePoint, users can make requests simply by clicking New Item on the page.



Compliance	Title *	Printer needs ink
Project Management	Request ID	1234
Human Resources	Status	Submitted
Security	Assigned To	Julian Isla
Training	Description	
Maintenance Requests	Requested By	Junmin Hao
Facilities	Date Needed	10/10/2013
Facility: Dallas	Emergency?	<input checked="" type="checkbox"/>
Facility: Portland		
Facility: Redmond		
Facility: Seattle		
Recent		
Equipment Tracking		
Site Contents		

After filling out the appropriate fields, the new request is surfaced in the list and the workflow is started.

Title	Request ID	Status	Assigned To	Description	Requested By	Date Needed	Emergency?	Maintenance Request Workflow
Eastside stairs light is out		Submitted	Julian Isla	The main flood lights for the eastside stairs is out.	Garth Fort	8/23/2013	No	
Printer needs ink	1234	Submitted	Julian Isla		Junmin Hao	10/10/2013	Yes	Request Received Notification



Office 365 for Business Learning Center
<http://aka.ms/o365learning>