



**Virto Workflow Scheduler
For Microsoft SharePoint
Release 5.1.1**



User and Installation Guide

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Virto Workflow Scheduler for SharePoint

Overview

Virto Workflow Scheduler is a tool for Microsoft SharePoint that allows running automatically any workflow within single SharePoint site collection on a specific date and time.

Virto Workflow Scheduler is **no code and ready-to-use** web part which can be installed on SharePoint site and does not require Microsoft Visual Studio or SharePoint Designer. Once web part is installed, you can create your specific rules to running workflow, e.g. start every hour, day, and week, recur it etc.

Key Features List

Feature	Version
Start and run SharePoint workflow according to a schedule	v.1.0
Supported triggers: daily on a specific time, weekly, monthly, one time	v.1.0
Can initiate workflow on any SharePoint List within single site collection	v.1.0
Can start workflow for single list item, any list, specific list or view, list item selected by CAML-query	v.1.0
Allows running recurrent workflows	v.1.0
Workflow can be started under system account or any specific user account	v.1.0
Site Workflows are supported	v.2.0
Hourly Time trigger	v.2.0
Run button for manual start of schedule	v.2.0
Content types workflows are supported	v.3.0
List view items limit	v.3.1.0
New license manager	v.4.0
Support the SharePoint 2013 workflow platform	v.5.0

System/Developer Requirements

Operating System

Microsoft Windows Server 2003, 2008, 2012

Server

SharePoint Release 2013:

- Microsoft Windows SharePoint Foundation 2013 or Microsoft Office SharePoint Server 2013;
- Microsoft .NET Framework 4.5;

SharePoint Release 2010:

- Microsoft Windows SharePoint Foundation 2010 or Microsoft Office SharePoint Server 2010;
- Microsoft .NET Framework 3.5;

SharePoint Release 3:

- Microsoft Windows SharePoint Services v3 or Microsoft Office SharePoint Server 2007;
- Microsoft .NET Framework 3.5;

Note: *This product is not compatible with SPS 2003 and WSS v2.*

Browser

Microsoft Internet Explorer 7 or higher.

Installation and Activation

This section describes how to install, upgrade, uninstall, or contact Support for the Virto Workflow Scheduler.

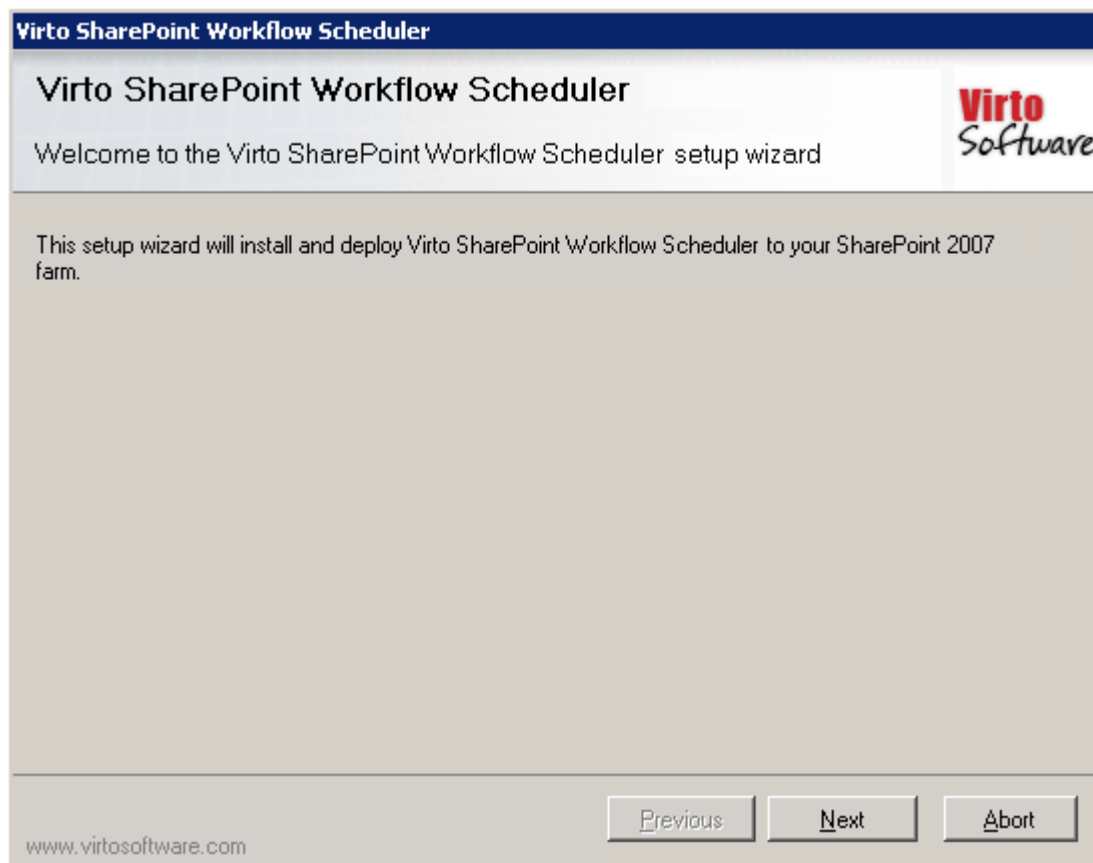
Installing Virto Workflow Scheduler

Before you begin, you need to make sure you have access to the server and your account must have the appropriate administrative privileges to install applications.

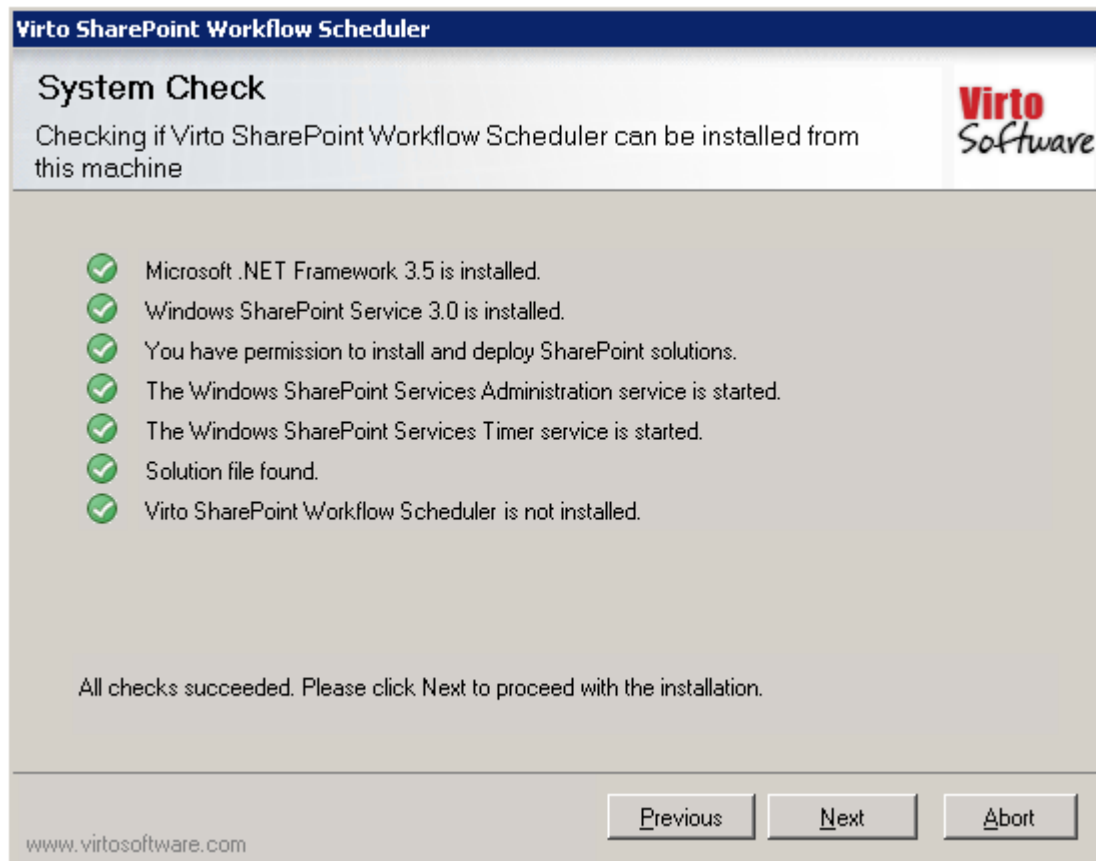
Virto Workflow Scheduler setup program provides links to the various installation components for the calendar.

To access Virto Workflow Scheduler Setup program download **Virto.SharePoint.WorkflowScheduler.X.X.zip** file and unzip it. Run extracted Setup.exe file.

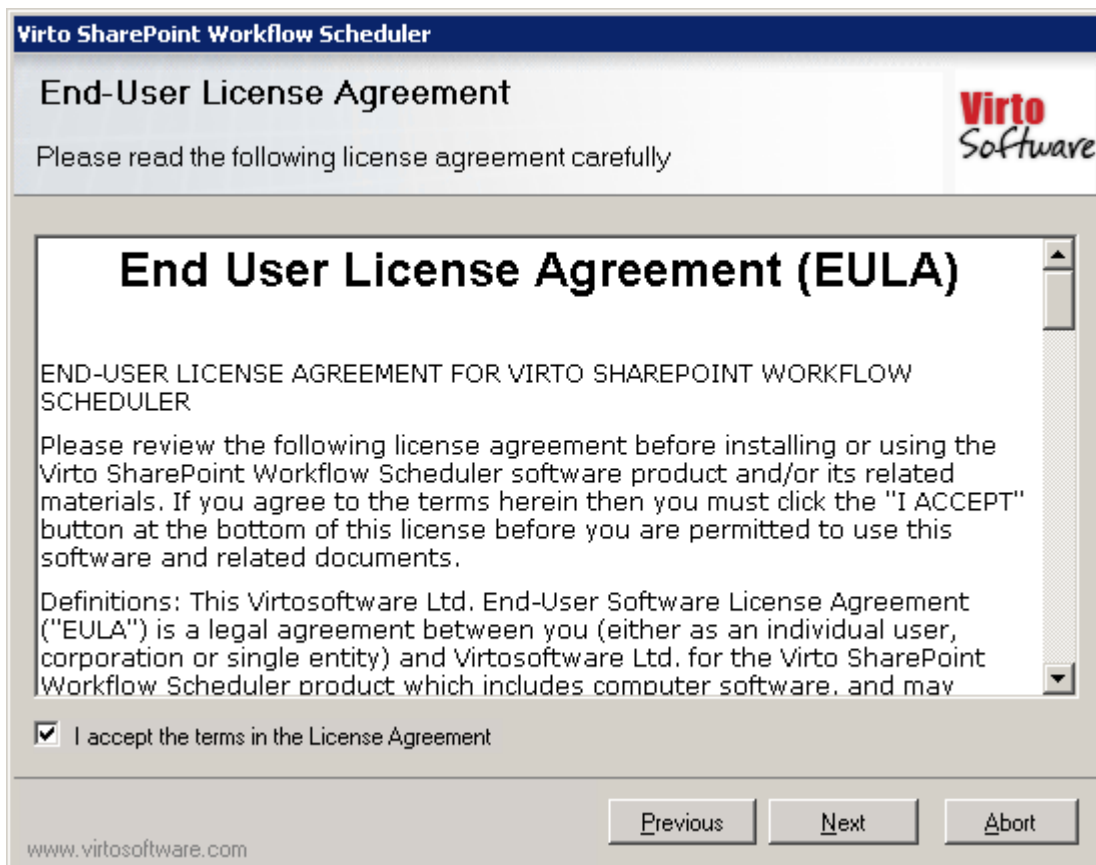
The setup wizard window will appear.



Virto Workflow Scheduler wizard performs a system check prior to the installation. All the system checks must be completed successfully in order to proceed with the installation. After the checks have completed, click "Next".

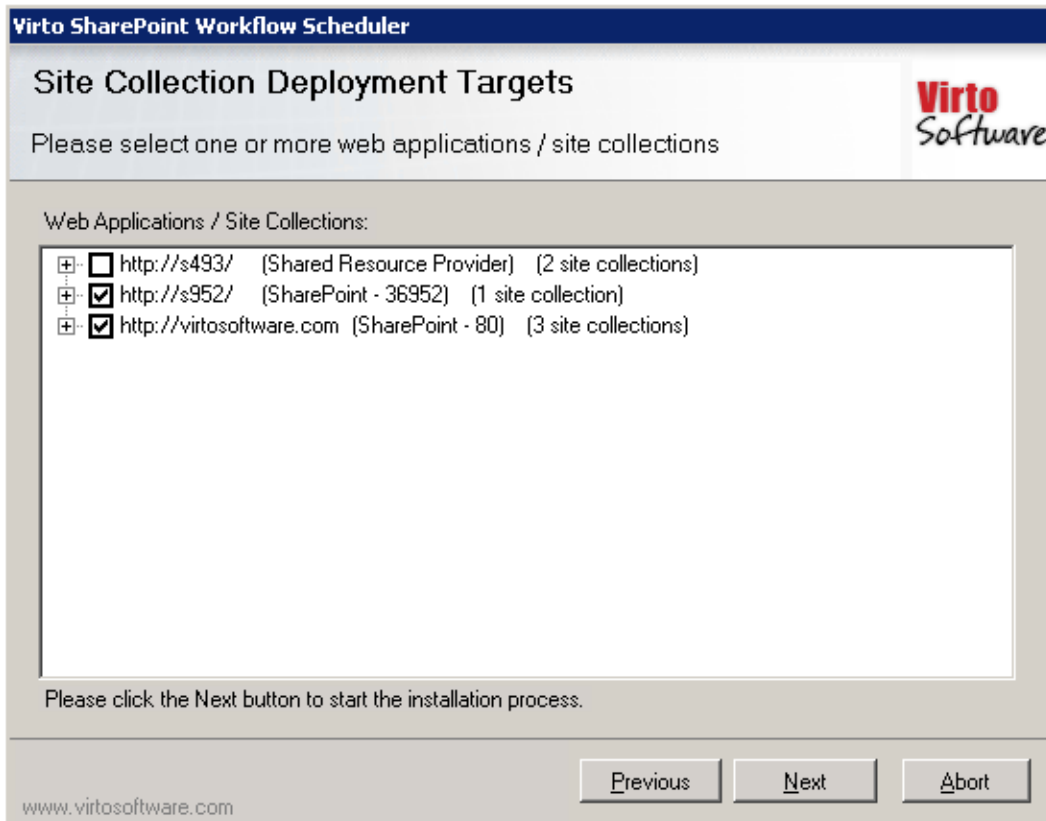


Check "I accept the terms in the License Agreement" and click "Next".



Select the web application(s) where you want to install the product.

Warning: You must be logged in to the SharePoint server with a Site Collection Administrator account to automatically activate this feature.

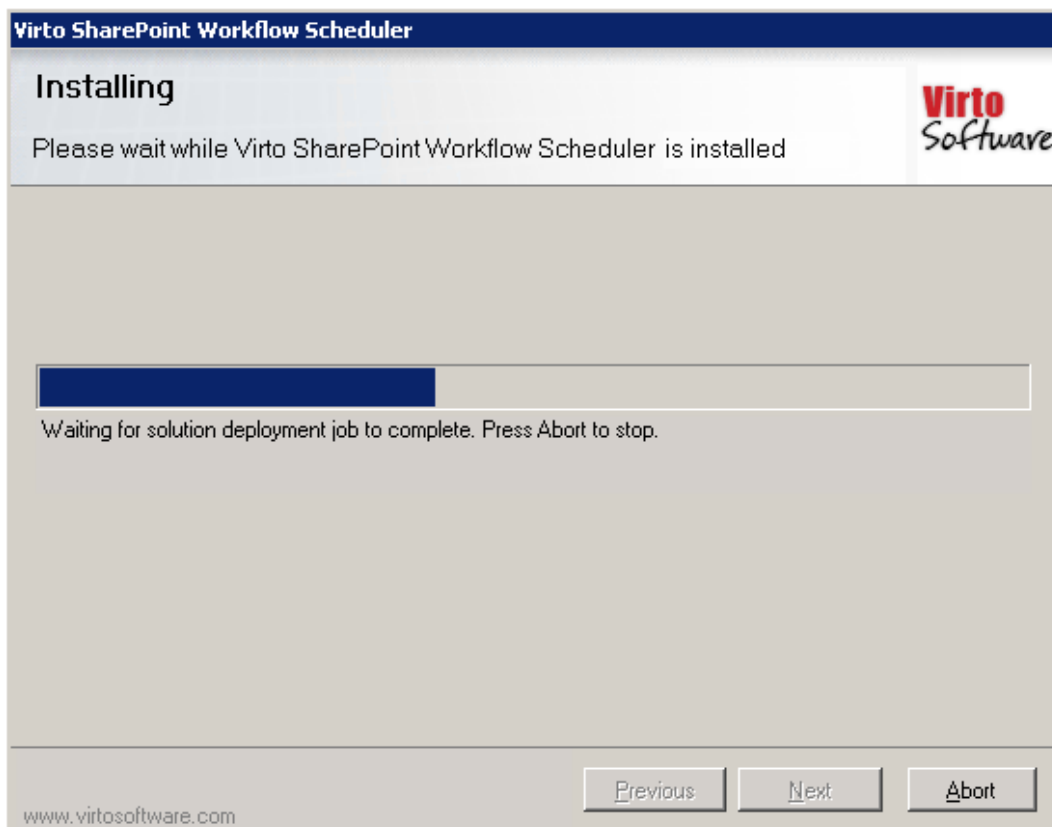


The screenshot shows a dialog box titled "Virto SharePoint Workflow Scheduler" with a sub-header "Site Collection Deployment Targets". The Virto Software logo is in the top right corner. Below the header, it says "Please select one or more web applications / site collections". Underneath, it says "Web Applications / Site Collections:" followed by a list of three items, each with a plus icon and a checkbox:

- http://s493/ (Shared Resource Provider) (2 site collections)
- http://s952/ (SharePoint - 36952) (1 site collection)
- http://virtosoftware.com (SharePoint - 80) (3 site collections)

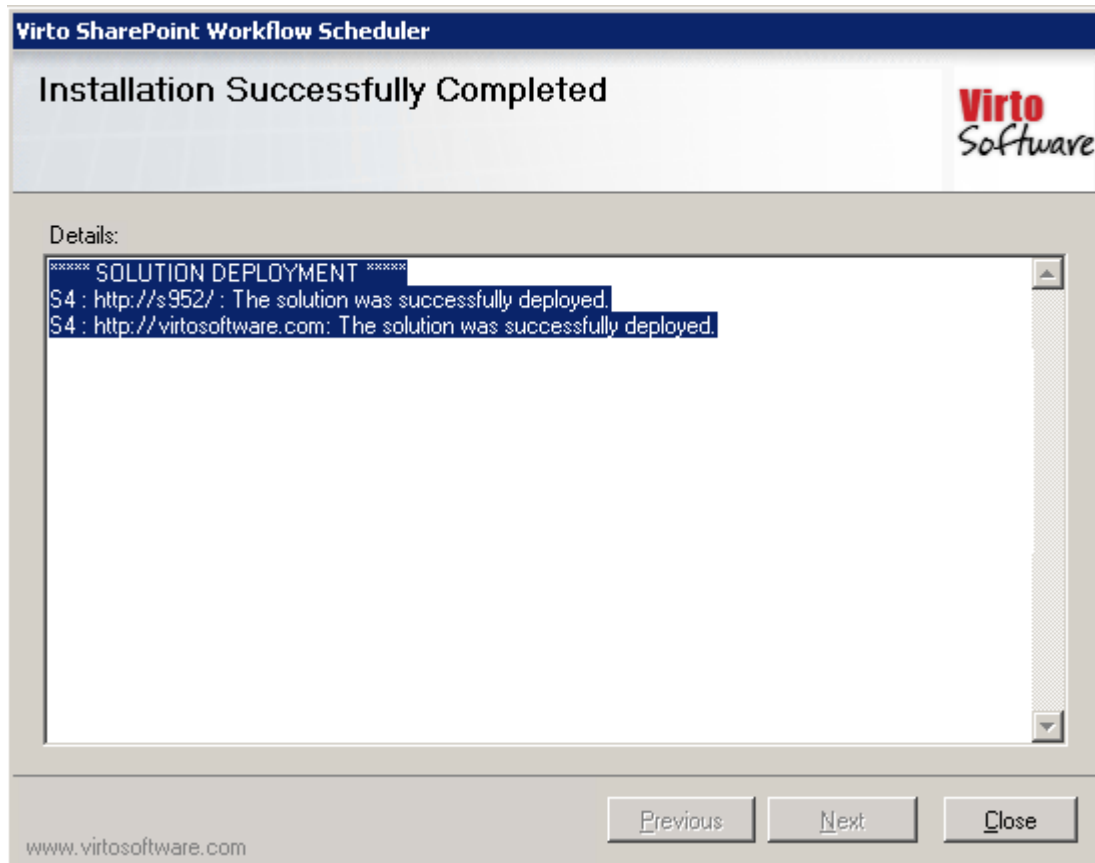
Below the list, it says "Please click the Next button to start the installation process." At the bottom, there are three buttons: "Previous", "Next", and "Abort". The website "www.virtosoftware.com" is in the bottom left corner.

Then click "Next".



The screenshot shows a dialog box titled "Virto SharePoint Workflow Scheduler" with a sub-header "Installing". The Virto Software logo is in the top right corner. Below the header, it says "Please wait while Virto SharePoint Workflow Scheduler is installed". In the center, there is a progress bar with a blue segment on the left. Below the progress bar, it says "Waiting for solution deployment job to complete. Press Abort to stop." At the bottom, there are three buttons: "Previous", "Next", and "Abort". The website "www.virtosoftware.com" is in the bottom left corner.

Click “Close” to complete the installation.



Note: installation process for SharePoint 2007, 2010 and 2013 version is similar to each other.

License Activation

To see full instruction for successful activation of your component, please download “Virto License Manager” PDF instruction from [Downloads](#) section of our site or read it in [Wiki](#).

Upgrading Virto Workflow Scheduler

If you already use Virto Workflow Scheduler and need to upgrade it to the latest version, download the.zip file from <http://www.virtosoftware.com>. Unzip the file and run setup.exe as it is described in the *Installing Virto Workflow Scheduler* section.

On the step 3 check the box “Upgrade” and click “Next”.

Note: if you had activated the license while installing the previous Virto Workflow Scheduler version, you do not need to activate it now.

Uninstalling Virto Workflow Scheduler

To uninstall the component:

1. Double click the Setup.exe extracted from downloaded **Virto.SharePoint.WorkflowScheduler.X.X.zip** file.
2. The program performs the system checks again. Once that has successfully completed, the program prompts you to Repair or Remove the solution. Select Remove, and click "Next".



Virto Workflow Scheduler Administration and Usage

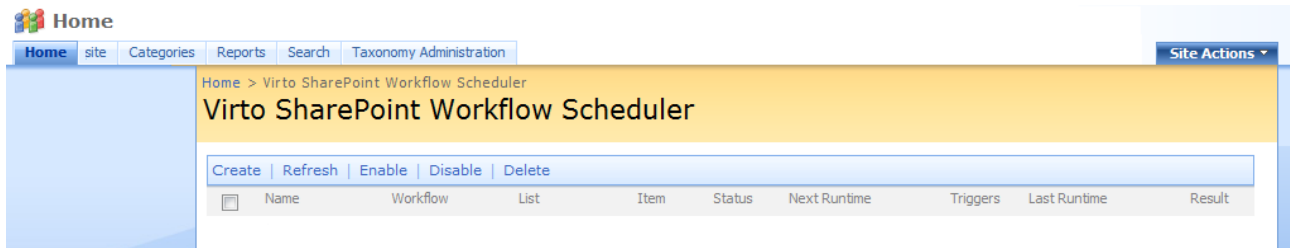
When Virto Workflow Scheduler is installed, go to **core** SharePoint site and find “Site Actions – Site Settings – Modify All Site Settings” page.

The screenshot shows the SharePoint 2007 Home page. The top navigation bar includes 'Home', 'site', 'Categories', 'Reports', 'Search', and 'Taxonomy Administration'. The main content area displays a welcome message for Microsoft Office SharePoint Server 2007. On the right side, the 'Site Actions' menu is open, showing options like 'Edit Page', 'Create Page', 'Create Site', 'Show Page Editing Toolbar', 'View All Site Content', 'View Reports', 'Site Settings', and 'Manage Content and Structure'. The 'Site Settings' option is highlighted, and a sub-menu is visible, with 'Modify All Site Settings' highlighted in a red box.

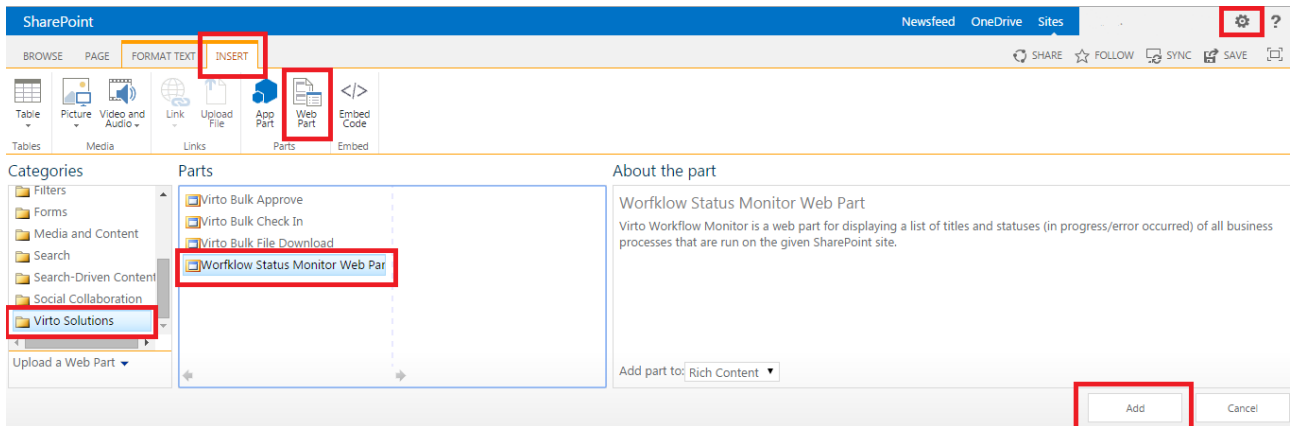
Then find “Virto Workflow Scheduler” link and follow it.

The screenshot shows the SharePoint 2007 Site Settings page. The page title is 'Site Settings'. Under 'Site Information', the Site URL is 'http://virtosoftware.com', the Mobile Site URL is 'http://virtosoftware.com/_layouts/mobile/default.aspx', and the Version is '12.0.0.6545'. Below this, there are five sections: 'Users and Permissions', 'Look and Feel', 'Galleries', 'Site Administration', and 'Site Collection Administration'. In the 'Site Collection Administration' section, the 'Virto Workflow Scheduler' link is highlighted with a red box.

You will go to Virto Workflow Scheduler page.

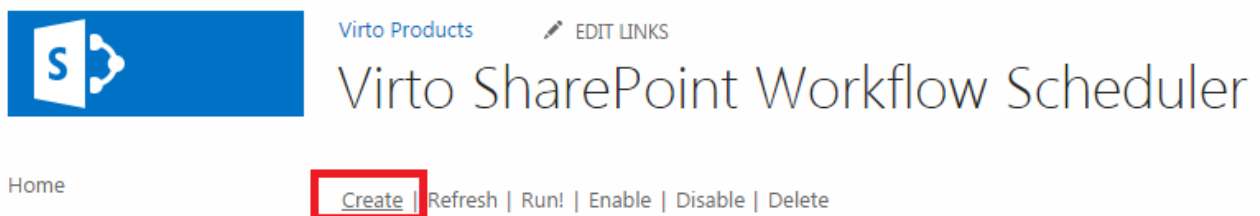


In more recent versions of SharePoint choose “Edit” on the core page, then select “Insert” button on the ribbon and add “Virtio Workflow Scheduler” Web Part from the list.



Creating Workflow Schedule

To create a workflow schedule, click “Create”.



Now you need to define new schedule settings.

Virtio SharePoint Workflow Scheduler ⓘ

Step 1. Name

Enter schedule name

Name:

- Enable
- Run the workflow instance asynchronously.
- Overwrite workflow

Step 2. Select source

Select list or site to take data from

Select source:

- List (List Workflow)
 -
- Site (Site Workflow)
 -

First of all enter schedule name and check the box “Enable”.

Now select a source list or site with workflow (all lists containing workflows will be displayed in the dropdown).

Virto Workflow Scheduler allows users to create workflows not only within SharePoint list but within the whole SharePoint site as well. This means that data will be taken from the site.

When you create (or edit) a workflow, you just need to select “Site” in the “Select Source” block.

Then you need to define items which the workflow will work for. You can select **all items** and check or uncheck box “Include folder”.

Step 3. Select list items

Select items that you want to run workflow with

Select workflow for:

All Items
 Include folder
 Items from List view
 All Documents
 Use an item limit to limit the amount of data that is returned to users of this view
 Single list item

 Items selected by CAML query (<Where>...</Where>)

Or you can select items from a certain list view:

Items from List view
 All Tasks
 All Tasks
 Late Tasks
 Upcoming
 Completed
 My Tasks
 Gantt Chart
 Calendar
 data that is returned to
 </Where>

Or a single list item.

It is also possible to define items selected by CAML query.

Single list item

Copy List Attachments Example.docx ▼

Items selected by CAML query (<Where>...</Where>)

```
<Where>
  <Eq>
    <FieldRef Name='LastName' />
    <Value
      Type='Text'>Janssens</Value>
  </Eq>
```

Then select a workflow that will be run for selected items.

Step 4. Select workflow

Select a workflow to run automatically

Select workflow:

Send notification ▼

If you want to change event data defined for selected workflow, you can edit it (optional field).

Step 5. Event data (Optional)

Specify workflow event data

Event data:

```
<dfs:myFields
  xmlns:xsd="http://www.w3.org/2001/XMLSchema"
  xmlns:dms="http://schemas.microsoft.com/office/2009/documentManagement/types"
```

Then set time trigger and define what date and time workflow should start.

Step 6. Automatically start

Set time trigger

Time trigger:

Daily ▼

Start: 6/5/2015 11 AM 00

Recur every: 1 days

Time trigger:

Daily ▼

Hourly

Daily 6/5/2015 11 AM 00

Weekly 1 days

Monthly

One Time

In case you need to set recurring, just define required settings.

Time trigger:

Daily ▼

Start: 6/5/2015

Recur every: 7 days

Moreover you can start workflow under specific account (workflows are run under **system account** by default). Enter initials of SharePoint user, first and last name will be displayed in the field form.

Step 7. Start the workflow under specific account

Select specific user

Enable

Nick Brook x



Check Names

When the schedule is created, you will see it in the list of schedules on Workflow Scheduler page.

Create | Refresh | Run! | Enable | Disable | Delete

<input type="checkbox"/>	Name	Workflow	Site/List	Item	Status	Next Runtime	Triggers	Last Runtime	Result
<input type="checkbox"/>	1_000	Send notification	Documents	All Items	Disabled		Daily	6/4/2015 6:20:01 AM	
<input type="checkbox"/>	2_000	Task Management	Tasks	All Items	Ready	6/8/2015 5:00:00 PM	Weekly	Never	
<input type="checkbox"/>	3_000	Move a document in the archive	Documents	Single Item	Ready	6/5/2015 4:00:00 PM	Daily	6/4/2015 4:00:05 PM	Success
<input type="checkbox"/>	4_000	Send notification	Documents	List View	Ready	6/5/2015 4:00:00 PM	OneTime	Never	

The following workflow details will be shown:

- **Name** (workflow schedule name);
- **Workflow** (selected from the list);
- **List** (source list and site);
- **Item** (items workflow will run for);
- **Status** (current state of the workflow);
- **Next runtime** (time when the workflow will be run);
- **Triggers** (type of schedule);
- **Last Runtime** (time of previous running);
- **Result** (the result of workflow).

If you want to disable a workflow schedule, check the box of it and click "Disable".

Create | Refresh | Run! | Enable | Disable | Delete

<input type="checkbox"/>	Name	Workflow	Site/List	Item	Status	Next Runtime
<input checked="" type="checkbox"/>	1_000	Send notification	Documents	All Items	Disabled	
<input type="checkbox"/>	2_000	Task Management	Tasks	All Items	Ready	6/8/2015 5:00:00 PM
<input type="checkbox"/>	3_000	Move a document in the archive	Documents	Single Item	Ready	6/5/2015 4:00:00 PM
<input type="checkbox"/>	4_000	Send notification	Documents	List View	Ready	6/5/2015 4:00:00 PM

To enable a workflow schedule, check the box of required one and click "Enable".

Create | Refresh | Run! | Enable | Disable | Delete

<input type="checkbox"/>	Name	Workflow	Site/List	Item	Status
<input checked="" type="checkbox"/>	1_000	Send notification	Documents	All Items	Ready
<input type="checkbox"/>	2_000	Task Management	Tasks	All Items	Ready
<input type="checkbox"/>	3_000	Move a document in the archive	Documents	Single Item	Ready
<input type="checkbox"/>	4_000	Send notification	Documents	List View	Ready

To delete a workflow, check the box of required one and click “Delete”.

Create | Refresh | Run! | Enable | Disable | Delete

<input type="checkbox"/>	Name	Workflow	Site/List
<input checked="" type="checkbox"/>	1_000	Send notification	Documents
<input type="checkbox"/>	2_000	Task Management	Tasks
<input type="checkbox"/>	3_000	Move a document in the archive	Documents
<input type="checkbox"/>	4_000	Send notification	Documents

To refresh data use “Refresh” button.

Create | Refresh | Run! | Enable | Disable | Delete

<input type="checkbox"/>	Name	Workflow	Site/List
<input checked="" type="checkbox"/>	1_000	Send notification	Documents
<input type="checkbox"/>	2_000	Task Management	Tasks
<input type="checkbox"/>	3_000	Move a document in the archive	Documents
<input type="checkbox"/>	4_000	Send notification	Documents

To start several workflows manually, select workflows and use “Run” button.

Create | Refresh | Run! | Enable | Disable | Delete

<input type="checkbox"/>	Name	Workflow	Site/List
<input checked="" type="checkbox"/>	1_000	Send notification	Documents
<input checked="" type="checkbox"/>	2_000	Task Management	Tasks
<input type="checkbox"/>	3_000	Move a document in the archive	Documents
<input type="checkbox"/>	4_000	Send notification	Documents

Site Workflows

Virto Workflow Scheduler allows users to create workflows not only within SharePoint list but within the whole SharePoint site as well. This means that data will be taken from the site.

When you create (or edit) a workflow, you just need to select “Site” in the “Select Source” block.

Step 2. Select source

Select list or site to take data from

Select source:

List (List Workflow)
 Site (Site Workflow)

Define other settings and click “OK” to save the workflow.


Hourly Time Trigger

You can define hourly time trigger for workflows. Just select “Hourly trigger” on the step 6 when workflow creating/editing and define time for each hour. Select hours’ checkboxes and click “OK”.

Step 6. Automatically start
Set time trigger

Time trigger:

Hourly ▾

6/5/2015  12 PM ▾ 00 ▾

<input type="checkbox"/> 00	<input type="checkbox"/> 01	<input type="checkbox"/> 02	<input type="checkbox"/> 03	<input type="checkbox"/> 04	<input type="checkbox"/> 05
<input type="checkbox"/> 06	<input type="checkbox"/> 07	<input type="checkbox"/> 08	<input checked="" type="checkbox"/> 09	<input type="checkbox"/> 10	<input type="checkbox"/> 11
<input checked="" type="checkbox"/> 12	<input type="checkbox"/> 13	<input type="checkbox"/> 14	<input checked="" type="checkbox"/> 15	<input type="checkbox"/> 16	<input type="checkbox"/> 17
<input checked="" type="checkbox"/> 18	<input type="checkbox"/> 19	<input type="checkbox"/> 20	<input type="checkbox"/> 21	<input type="checkbox"/> 22	<input type="checkbox"/> 23

Version Release History

Release Date	Version	Description
11/26/2010	v. 1.1.0	First public release.
06/29/2011	v.2.0.0	[+] Support Site Workflows [+] Added Hourly Time trigger [+] Added Run button to start schedule manually. [-] Some bugs are fixed
06/30/2011	v. 2.0.1	[-] Fixed 40x error if click OK or Cancel button.
09/20/2011	v. 2.0.2	[-] Script controls may not be registered before PreRender
01/13/2012	v. 3.0.0	[+] Content types workflows are supported
02/13/2012	v. 3.1.0	[+] List view items limit
02/14/2012	v. 3.1.1	[-] Some bugs with content types
02/15/2012	v. 3.1.2	[-] Some bugs with user permissions
04/17/2012	v. 3.1.4	[-] Workflows do not start for folders
01/05/2012	v. 3.1.5	[-] Increasing Performance
05/30/2012	v. 3.1.6	[-] Job timer: Access denied exception
11/28/2012	v. 3.1.7	[-] Some bugs with site workflows
03/18/2013	v. 3.1.9	[-] Some bugs with scheduler
05/30/2013	v. 3.1.10	[-] Fixed time bugs
09/10/2013	v. 4.0.0	[+] New license manager
05/26/2015	v. 5.0.0	[+] Support the SharePoint 2013 workflow platform
06/09/2015	v. 5.0.1	[+] Ignoring of broken lists
06/09/2015	v. 5.0.2	[-] Fixed bug with the DateTime control on sub sites
06/29/2015	v. 5.0.3	[-] creating a schedule from SPListItem [-] list view selection always defaults
06/30/2015	v. 5.0.4	[+] ignore a schedule for list that was deleted
07/15/2015	v. 5.1.1	[+] New license manager