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

**User and Installation Guide**

# Table of Contents

# 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 of 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.
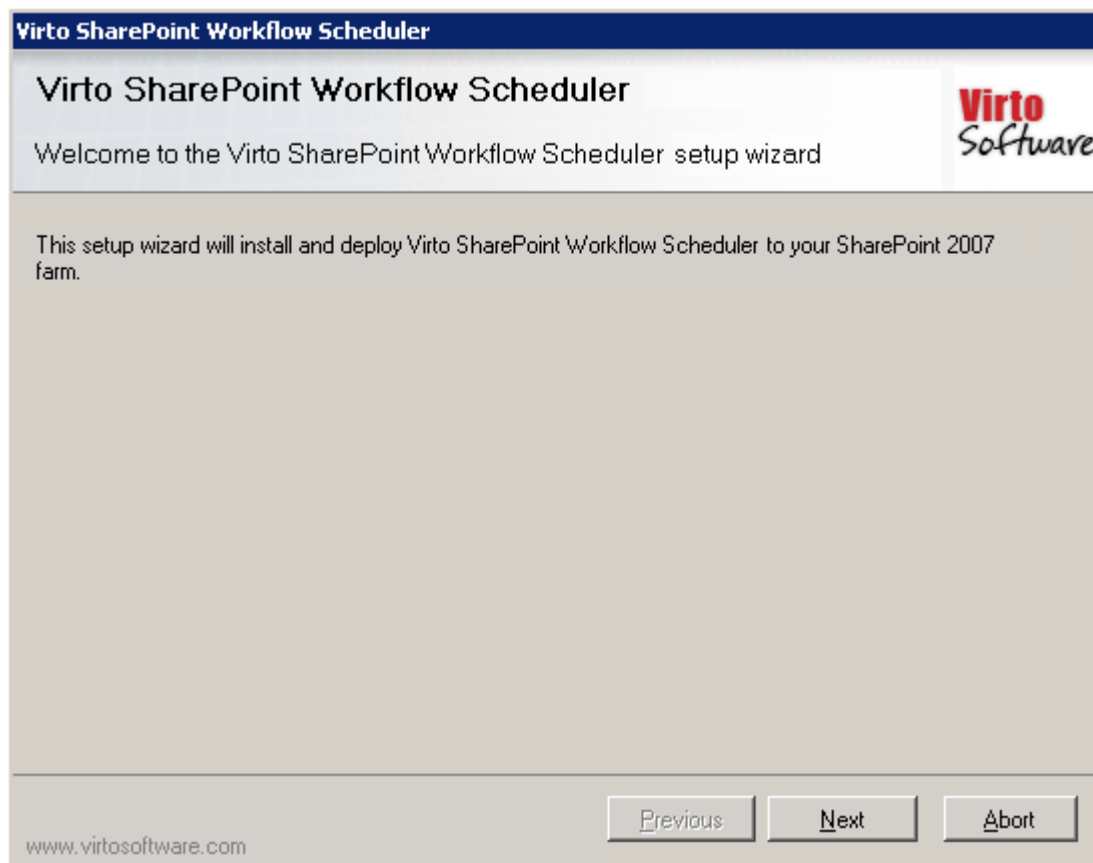


Virto Workflow Scheduler wizard performs a system check prior to the installation. All the system checks must be completed successfully in order to proceed with the installation. After the checks have completed, click "Next".
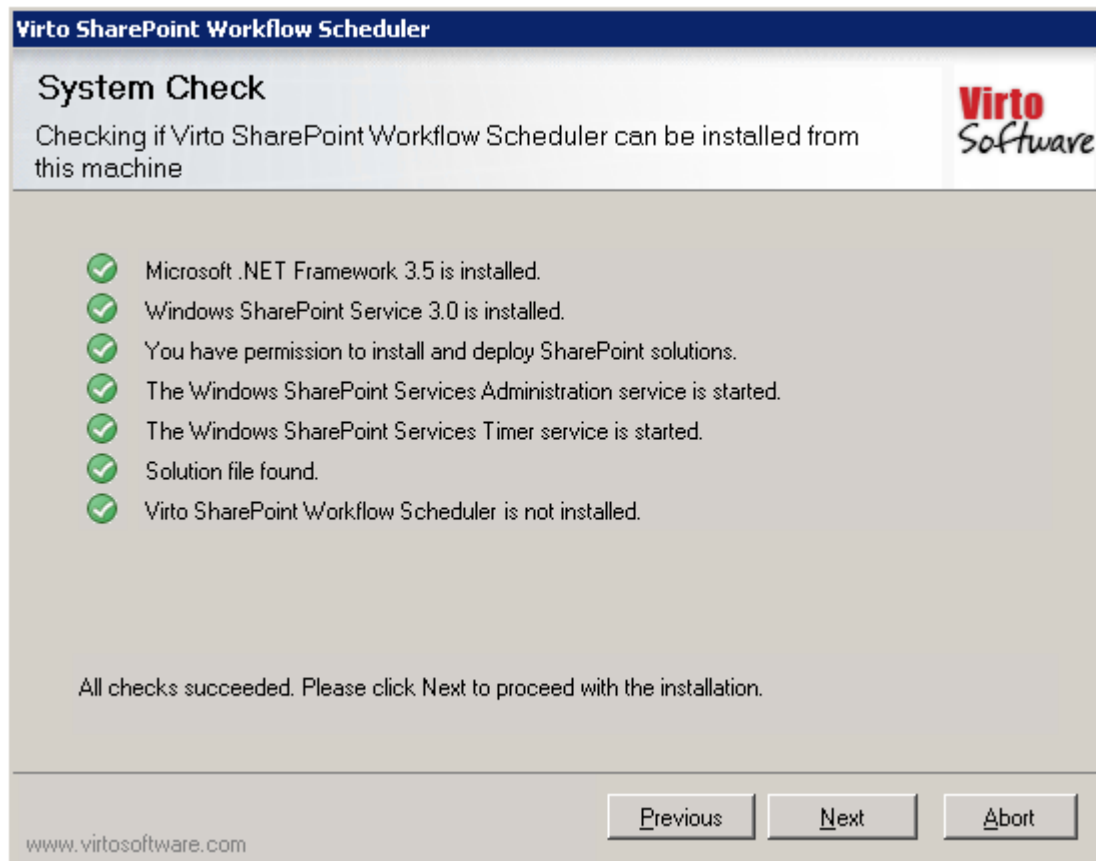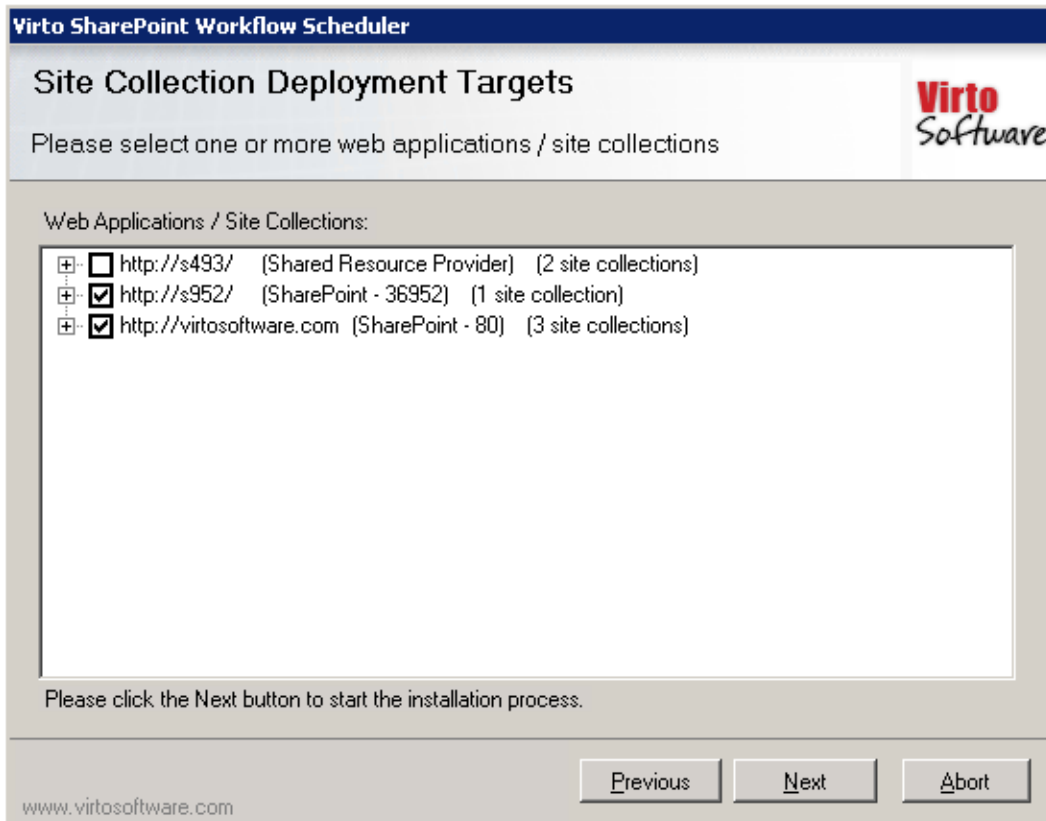
Check "I accept the terms in the License Agreement" and click "Next".
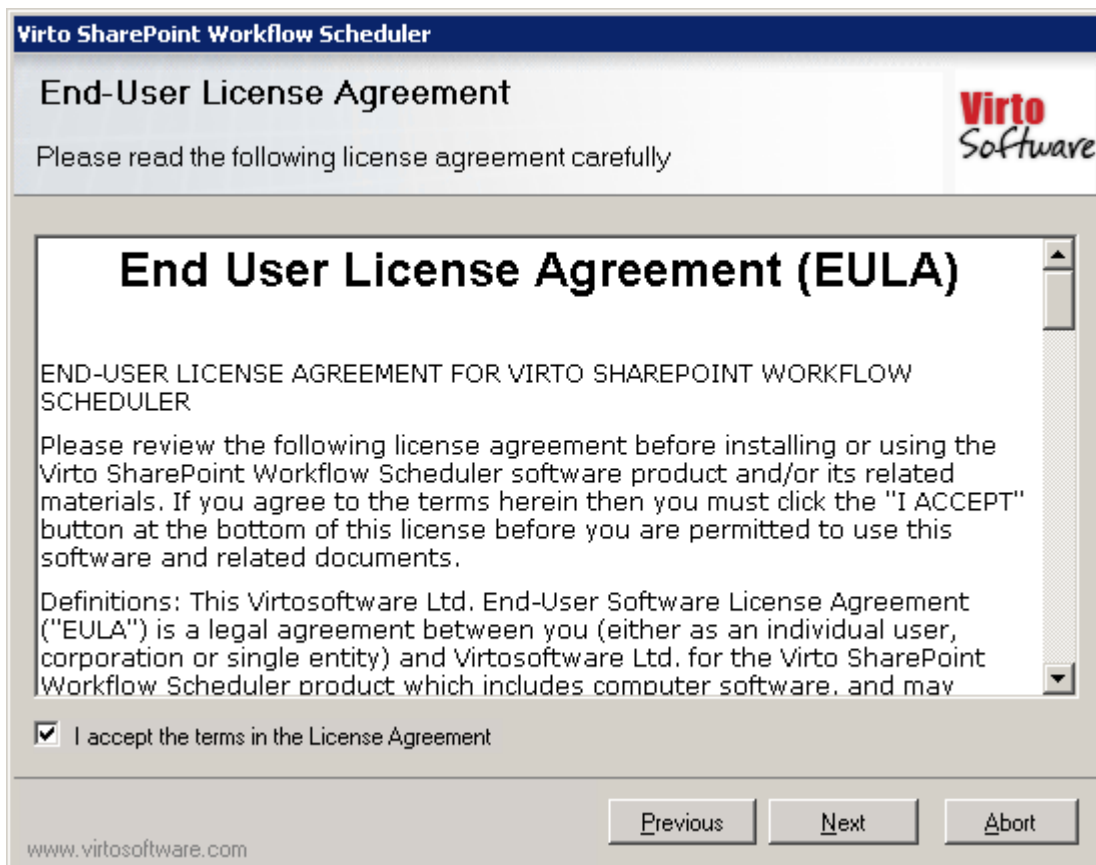


Select the web application(s) where you want to install the product.

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



Then click "Next".

Click "Close" to complete the installation.
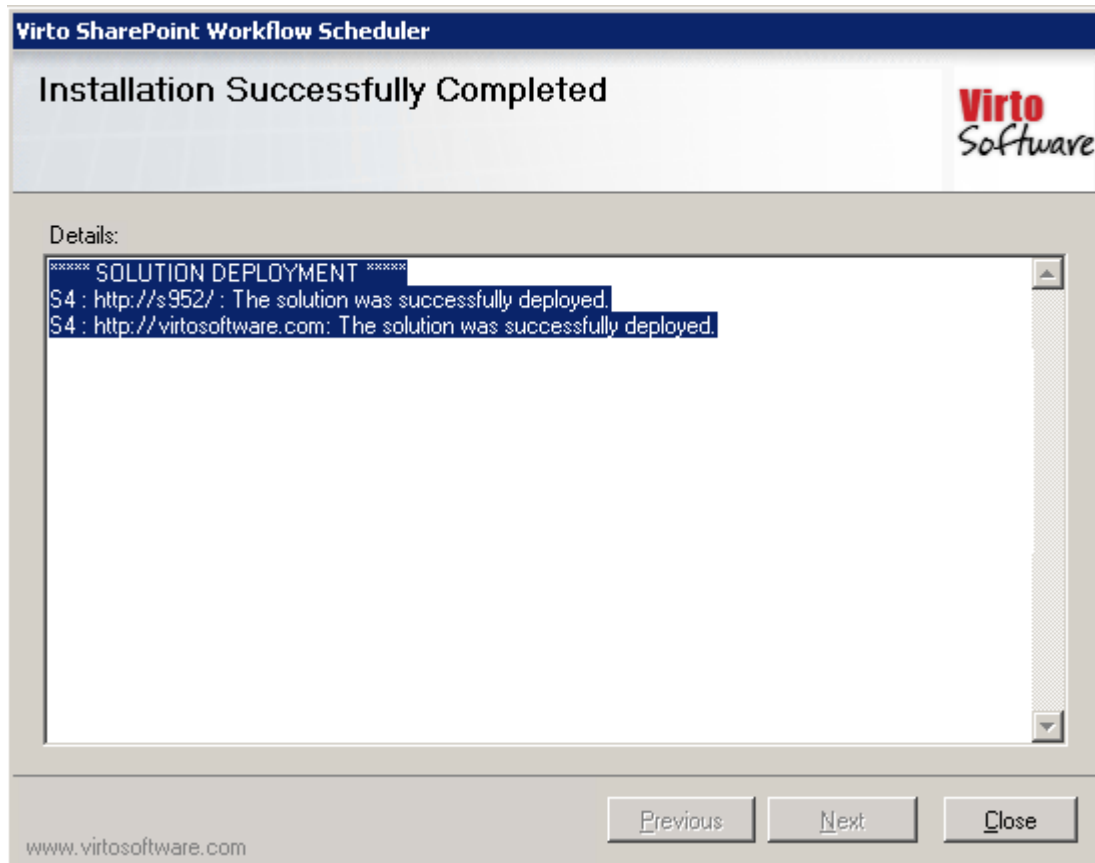


*Note*: *installation process for SharePoint 2007, 2010 and 2013 version is similar to each other.*

## *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".

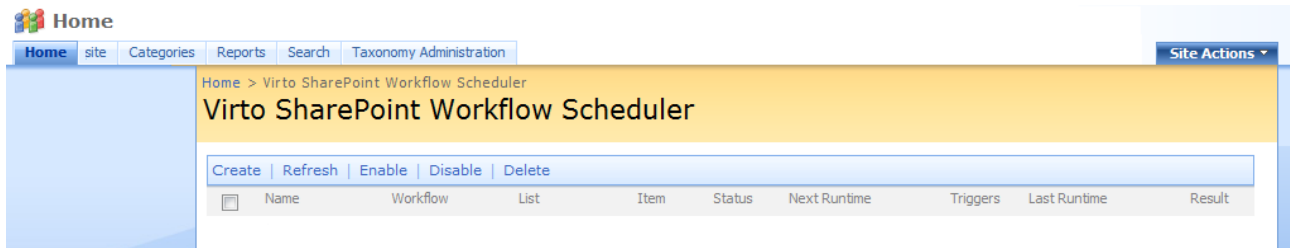# Virto Workflow Scheduler Administration and Usage

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



Then find "Virto Workflow Scheduler" link and follow it.
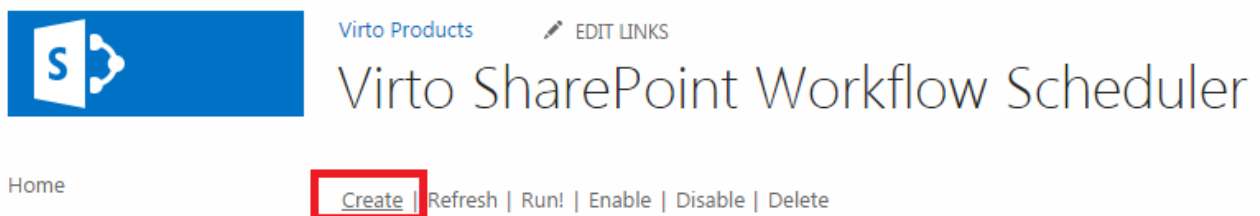


You will go to Virto Workflow Scheduler page.

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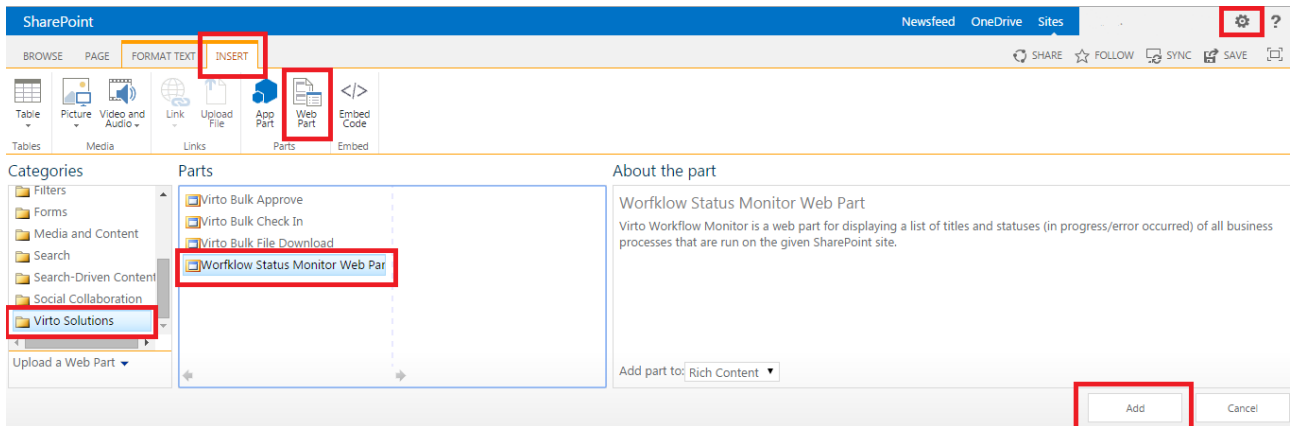


## Creating Workflow Schedule

To create a workflow schedule, click "Create".



Now you need to define new schedule settings.

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".



Or you can select items from a certain list view:



Or a single list item.

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

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



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



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





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

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

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

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".

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

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



To refresh data use "Refresh" button.



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



## 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.



Define other settings and click "OK" to save the workflow.

# Hourly Time Trigger

You can define hourly tome 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".

## 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<br>[+] Added Hourly Time trigger<br>[+] Added Run button to start schedule manually.<br>[-] 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<br>[-] 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 |