



**Virto Workflow Scheduler
For Microsoft
SharePoint Online**

User and Installation Guide

Table of Contents

OVERVIEW	3
INSTALLATION OF VIRTO SHAREPOINT WORKFLOW SCHEDULER FOR OFFICE 365	3
VIRTO WORKFLOW SCHEDULER ADMINISTRATION AND USAGE	4
CREATE WORKFLOW SCHEDULE	4
VERSION RELEASE HISTORY	8

Virto Office 365 Workflow Scheduler

Overview

Virto Office 365 Workflow Scheduler is a tool for Office 365 that allows to run automatically any workflow within single SharePoint site collection on a specific date and time.

Virto Office 365 Workflow Scheduler is **no code and ready-to-use** add-in 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.

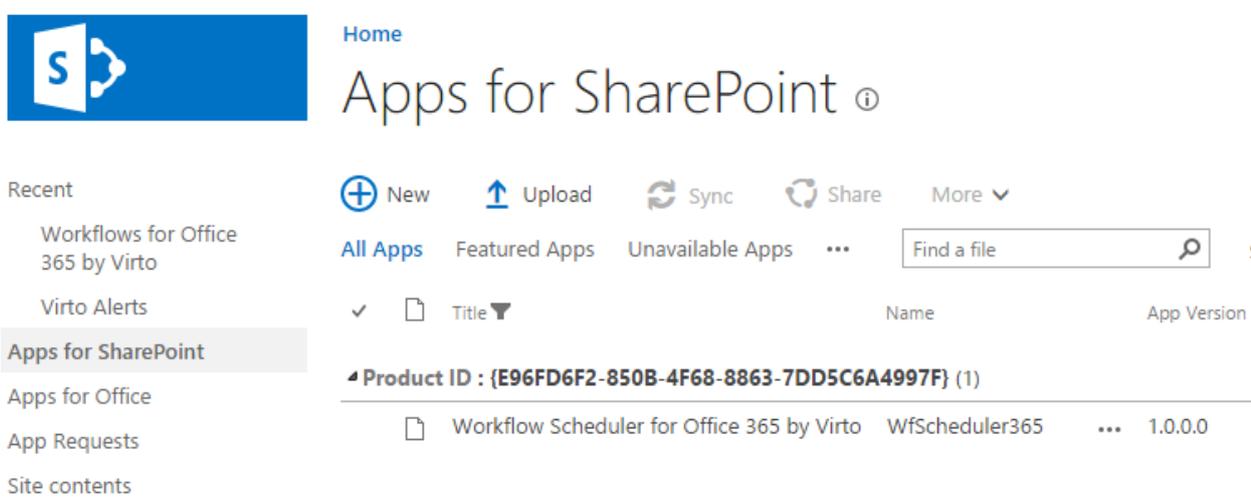
Installation of Virto SharePoint Workflow Scheduler for Office 365

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.

- 1) Download the Workflow Scheduler from the product page [Link](#).
- 2) Add it in the app catalog on your site in "Apps for SharePoint".

You will find the app catalog library by navigating to your Office 365 admin center, selecting "SharePoint" under the "Admin" section, then the "apps" navigation link left and then App Catalog under the listed links.

Depending on your O365 subscription plan you will need to navigate to your app catalog directly using the web address: [https://\[your_domain_name\].sharepoint.com/sites/AppCatalog/](https://[your_domain_name].sharepoint.com/sites/AppCatalog/).



- 3) Go to the site where you will add Workflow Scheduler for Office 365.

4) Click "Site content", add a new app and choose the link "From Your Organization", click "Workflow Scheduler for Office 365 by Virto" icon and trust it.

Workflow testing site collection Test page EDIT LINKS

Site contents > Your Apps

Your Apps Find an app

Apps You Can Add

From Your Organization

Manage Licenses

Your Requests

SharePoint Store

Apps from your organization Newest Name

Virto Gantt Chart Add-in App Details

Workflow Scheduler for Office 365 by Virto App Details

Workflc by Virtc You can Find out

5) Now you are ready to schedule workflows in your SharePoint!

The installation is completed.

Virto Workflow Scheduler Administration and Usage

When Virto Workflow Scheduler is installed, go to SharePoint Site Contents and find "Virto Workflow Scheduler" link in apps list.

You will be redirected to Virto Workflow Scheduler page, where you can manage your workflows.

Back to site		Virto Workflow Scheduler			
New Edit Delete Run Enable/Disable					
✓ Title	Type	Workflow Name	Web Url	Status	
1	List	Get parent folder params	https://virtosoft.sharepoint.com/sites/wf	Enabled	
test	List	Create custom task	https://virtosoft.sharepoint.com/sites/wf	Enabled	

Create Workflow Schedule

To create a workflow schedule, click "New".

Back to site		Virto Workflow Scheduler			
New Edit Delete Run Enable/Disable					
✓ Title	Type				
1	List				
test	List				

Now you need to define new schedule settings.

Title *	Get parent fc
Create List Item workflow schedule	Get parent fc
Workflow type	Get field val
List	Get list item
Workflow	Create share
CreateListItem	CopyListItem

Enter a name for the scheduled workflow.

Now select workflow type. It can be list or site workflow.

Then specify a workflow from the dropdown. All existing workflows of the site collection will be displayed in the dropdown.

If you select list workflow type, you can add additional view filters to define items to process with the workflow.

Workflow

Expiration date workflow

Filter by

View

All Documents

Relink Documents

assetLibTemp

Merge Documents

Now you have to select the workflow schedule frequency.

You can apply Hourly, Daily, Weekly, or Monthly schedule to run workflow at a particular or on a particular day of the week/month.

Schedule type

Hourly

Hourly

Daily

Weekly

Monthly

Then set a time trigger and define on which date and time workflow should start.

Schedule type

Recure every (days)

Time

Schedule type

Time

Months

- January April July October
 February May August November
 March June September December

Days

- Monday Friday
 Tuesday Saturday
 Wednesday Sunday
 Thursday

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

Back to site		Virto Workflow Scheduler		
 New	 Edit	 Delete	 Run	Enable/Disable
✓	Title		Type	
	1		List	
	test		List	
	Create List Item workflow schedule		List	

The following workflow details will be displayed:

- **Title** (workflow schedule name);
- **Workflow type** (list or site);
- **Workflow name** (title of used workflow);
- **Web URL** (the site where this workflow runs);
- **Status** (current state of the workflow);

Back to site		Virtio Workflow Scheduler			
 New  Edit  Delete  Run  Enable/Disable					
<input type="checkbox"/>	Title	Type	Workflow Name	Web Url	Status
<input type="checkbox"/>	1	List	Get parent folder params	https://virtosoft.sharepoint.com/sites/wf	Enabled
<input type="checkbox"/>	test	List	Create custom task	https://virtosoft.sharepoint.com/sites/wf	Enabled

If you want to disable a workflow schedule, check the box on the right side of its title and click “Disable”.

You can edit selected workflows with “Edit” button.

Check the box of required workflows and click “Delete” to delete them.

Select a workflow and use “Run” button to start this workflow manually.

Back to site		Virtio Workflow Scheduler			
 New  Edit  Delete  Run  Enable/Disable					
<input type="checkbox"/>	Title	Type			
<input type="checkbox"/>	1	List			
<input type="checkbox"/>	test	List			
<input checked="" type="checkbox"/>	Create List Item workflow schedule	List			

Version Release History

Release Date	Version	Description
06/06/2017	v. 1.0.0	First public release.