Create a workflow that sends e-mail notifications about high priority tasks

1. **Step 1, open SharePoint Designer 2013 and create a new task app list**
   
   1) Go to the SharePoint Designer 2013
   2) Click on the “Lists and Libraries”
   3) Click on “SharePoint List”
   4) Select the “Task”
   5) Enter the Name: **Tasks**
   6) Click OK
   
   ![Image of SharePoint Designer interface]

   7) Click on the list “Tasks”

   ![Image of SharePoint Designer interface]

   8) Click on “Edit list columns” under **Customization**

   ![Image of SharePoint Designer interface]
9) Select and delete the following columns
   a) Predecessors
   b) Related Items
   c) % Complete

10) Click Save

Step 2, create a new workflow

1) Open the Summary view

2) Click on the “Tasks” list

3) Go to Workflows

4) Click New
a) Enter the Name: “SendEmail”

5) Select **Platform Type**: “SharePoint 2010 Workflow” from the dropdown list

6) Click OK

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**Step 3, set the conditions for the workflow**

1) Click on the “Condition” button

2) Select the “If current item field equals value”
3) Click on “field”

4) Select “Priority” from the dropdown

5) Click on “value”

6) Select “(1) High” from the dropdown list

7) Click on “Actions”

8) Select “Send an Email”

9) Click on the “these users” link

10) Click on the icon
11) Select “Workflow Lookup for a User”

12) Click Add

13) Select “Assigned To” from the dropdown list

14) Select “Email Addresses, Semicolon Delimited”

15) Click OK

16) Click OK

- **Step 4**, insert a hyperlink to the Edit item form in the email body

1) Enter the “Subject”: **New task assigned**

2) Click on the “Insert” icon

www.kalmstrom.com
3) Click on "Add or change Lookup"

4) Select "Title (linked to item with edit menu) (old)" from the dropdown list

5) Click OK

6) Click OK to the String Builder dialog box

7) Enter the text in the e-mail body: "Here is the task"

8) Select the text "task"

9) Click on the "Link" icon

   a) Click on the "Insert" icon

   b) Enter the URL “https://site.com/lists/Tasks/EditForm.aspx?ID=1” in the String Builder dialog box
c) Go to the SharePoint site and copy the site URL

![SharePoint URL](https://sp13book.sharepoint.com)

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d) Go back to SharePoint Designer 2013

e) Remove the part https://site.com from the URL

f) Paste the the URL copied from the SharePoint site

![String Builder](https://sp13book.sharepoint.com)

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g) Click on the “Add or change Lookup”

h) Select ID from the dropdown

i) Click OK

**Step 5, publish the workflow**

11) Click on “Check for Errors”

12) Click OK to the dialog box

13) Open the summary

14) Click on “SendEmail”

![SendEmail](https://sp13book.sharepoint.com)

15) Go to the “Start Options”

   a) Check all of the options except

     “Require manage List permissions”

![Start Options](https://sp13book.sharepoint.com)
17) Click **Publish**

- **Step 6, create a test task**
  1) Go to the SharePoint site
  2) Click on “new task”

3) Enter
   a) Task Name*: **Test 1**
   b) Assigned to: **Peter Kalmstrom**
   c) Priority: **(1) High**
  4) Click Save
  5) Click on “Outlook” in the top navigation
  6) Check that the workflow has sent an e-mail