



**Virto Workflow Scheduler  
For Microsoft SharePoint  
Release 5.2.3**



**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
Log folders are added. Workflows with errors are not stopped.	v.5.2

## 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.

### Expected Outage

The expected outage time is from 2 minutes to several hours depending on your hardware and number of SharePoint sites. Though we recommend all Virto users to upgrade on a weekend.

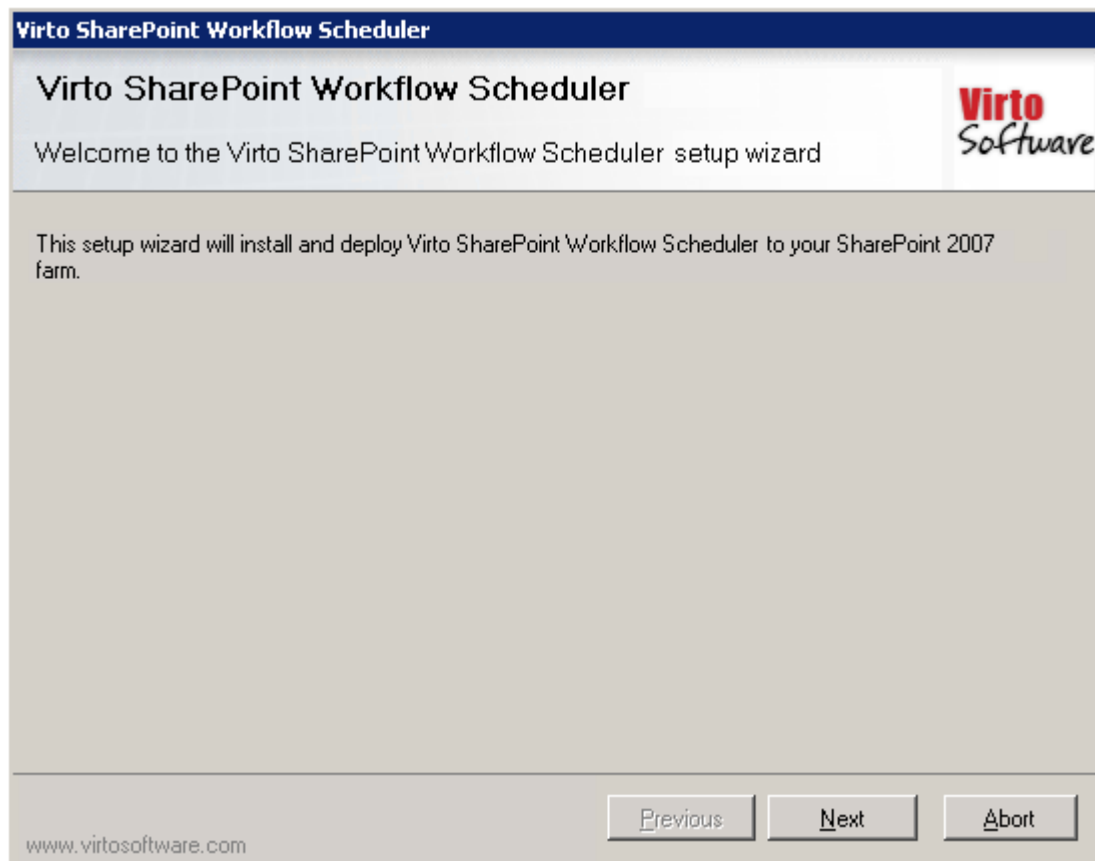
### Installing Virto Workflow Scheduler

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.

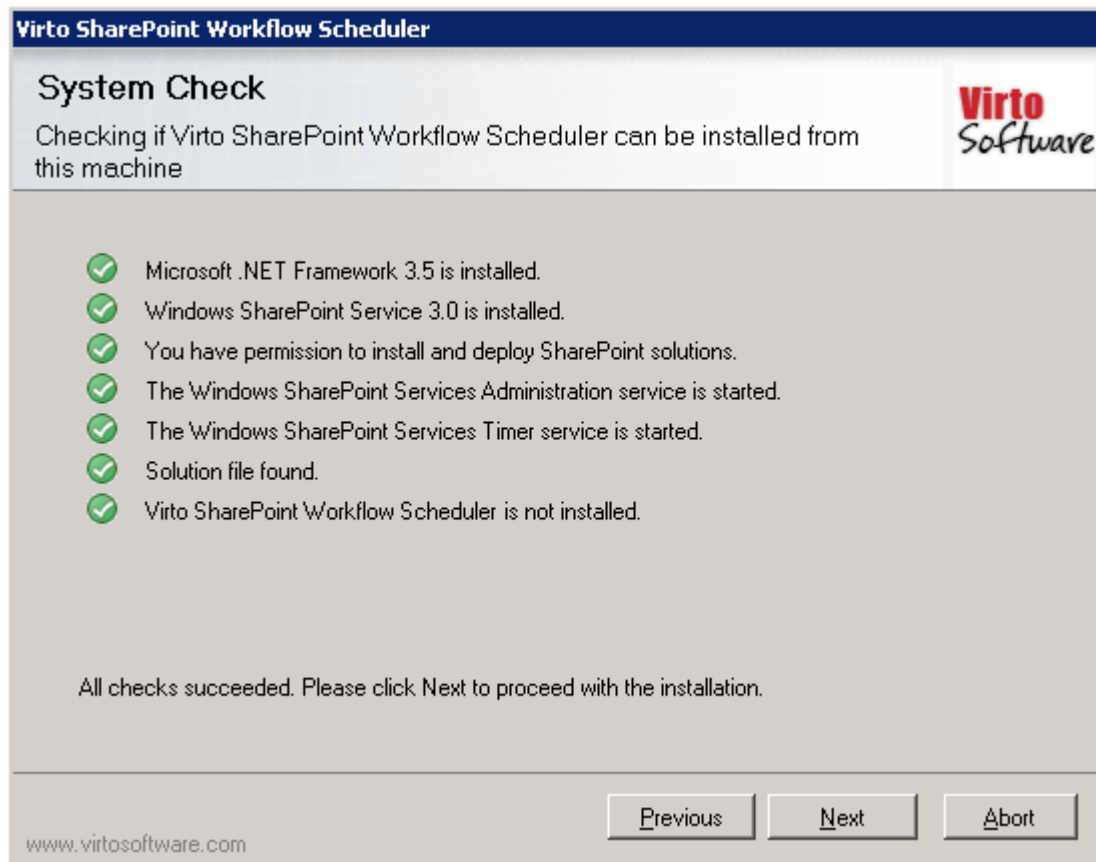
To access Virto Workflow Scheduler Setup program download **Virto.SharePoint.WorkflowScheduler.X.X.zip** file and unzip it. Run extracted Setup.exe file.

The setup wizard window will appear.

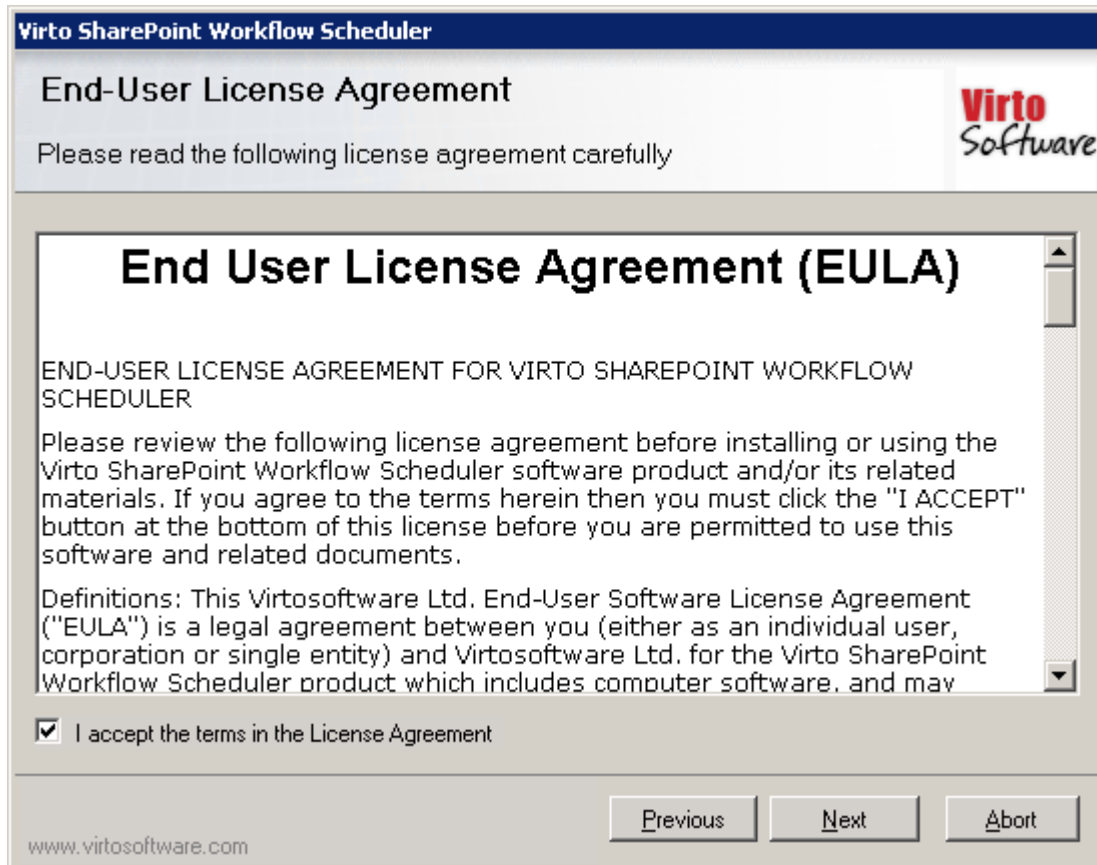


Virto Workflow Scheduler wizard performs a system check prior to the installation. All the system

checks must be completed successfully in order to proceed with the installation. After the checks have completed, click “Next”.

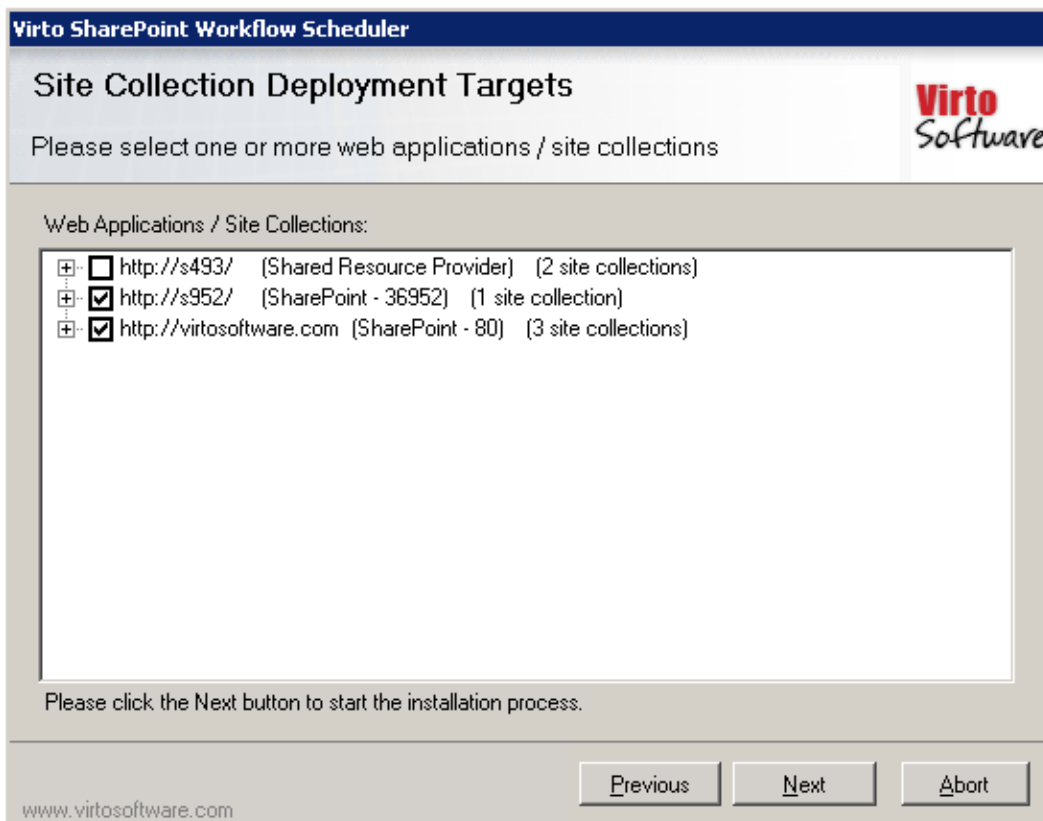


Check “I accept the terms in the License Agreement” and click “Next”.

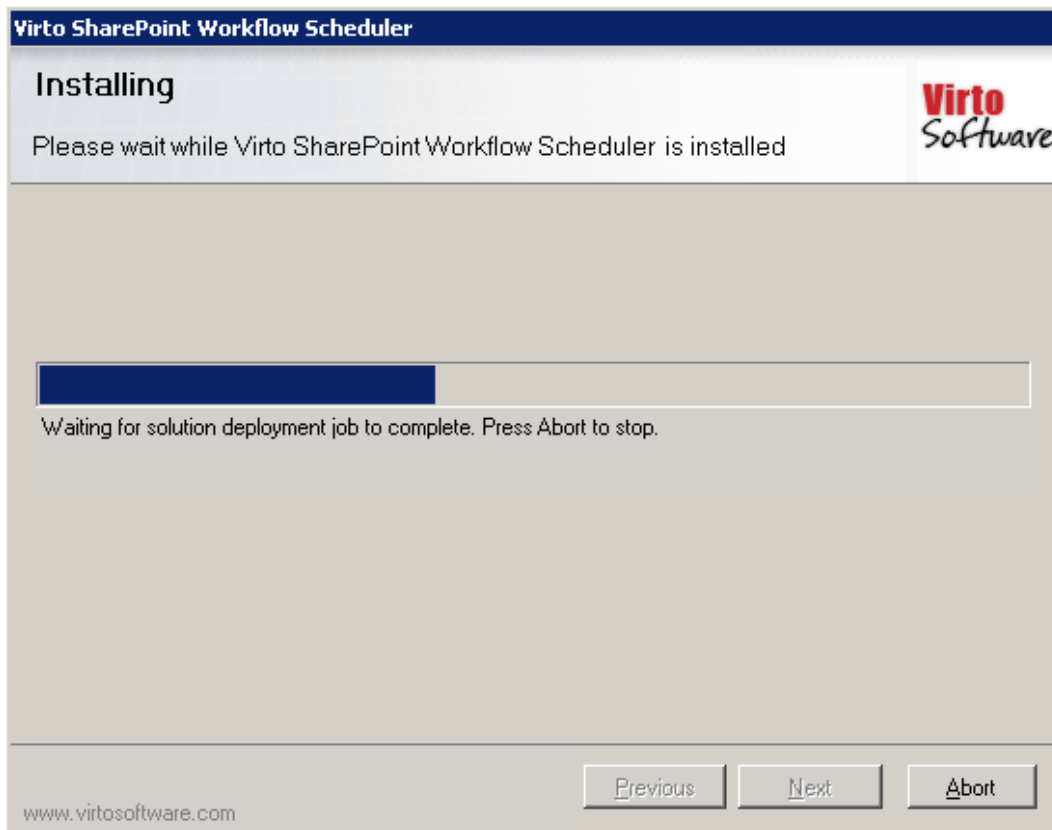


Select the web application(s) where you want to install the product.

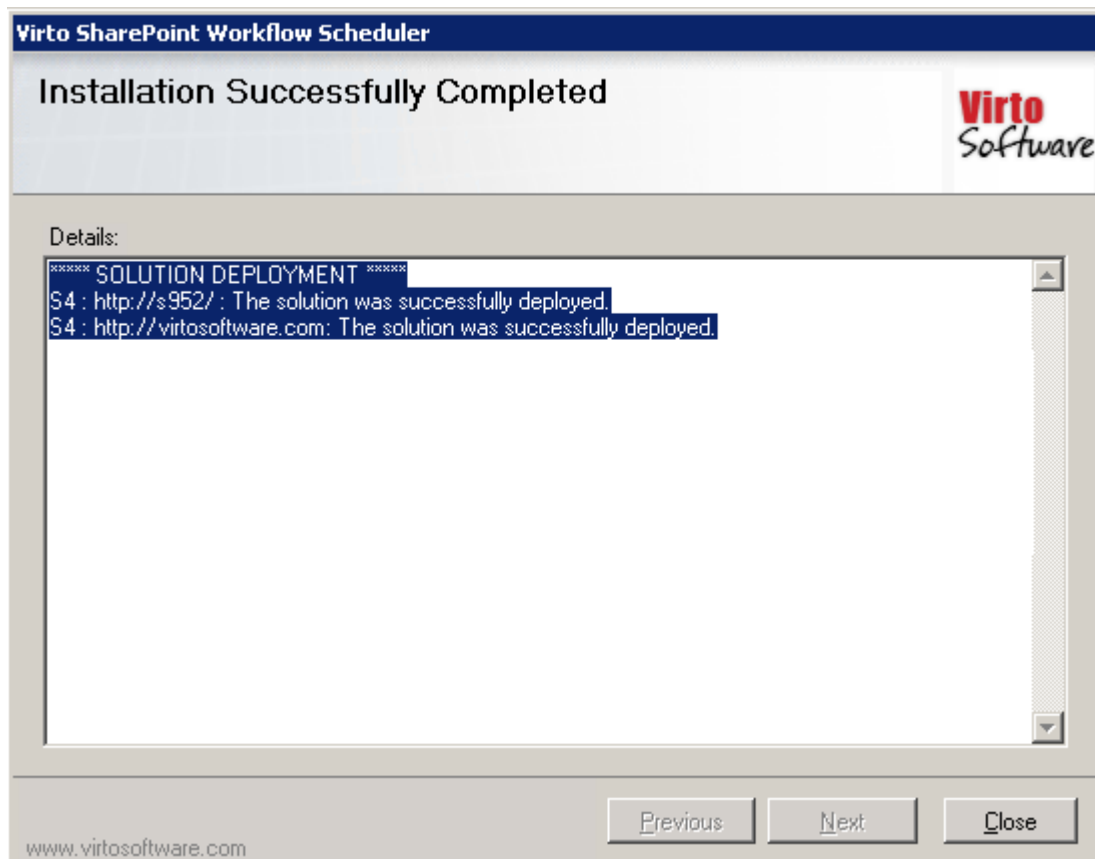
**Warning:** You must be logged in to the SharePoint server with a Site Collection Administrator account to automatically activate this feature.



Then click "Next".



Click "Close" to complete the installation.





**Note:** installation process for SharePoint 2007, 2010, 2013, and 2016 versions 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 SharePoint site settings and find “Virto Workflow Scheduler” link in the “Site Collection Administration” settings.

- Site Collection Administration
- Recycle bin
- Search Result Sources
- Search Result Types
- Search Query Rules
- Search Schema
- Search Settings
- Search Configuration Import
- Search Configuration Export
- Site collection features
- Site hierarchy
- Site collection navigation
- Search engine optimization settings
- Site collection audit settings
- Audit log reports
- Portal site connection
- Content Type Policy Templates
- Storage Metrics
- Site collection app permissions
- Site Policies
- Content type publishing
- Site collection object cache
- Popularity and Search Reports
- Site collection output cache
- Site collection cache profiles
- Variations Settings
- Variation labels
- Variation logs
- Translatable columns
- Suggested Content Browser Locations
- Help settings
- HTML Field Security
- SharePoint Designer Settings
- Virto Workflow Scheduler**
- Site collection health checks
- Site collection upgrade

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

[NVDev](#) [HTML5 Bulk Upload](#) [HTML Gantt](#) [Activities 2013](#) [Kanban](#) [Bulk Download](#) [Social Aggregator](#)

## Virto SharePoint Workflow Scheduler

[Create](#) | [Refresh](#) | [Run!](#) | [Enable](#) | [Disable](#) | [Delete](#)

<input type="checkbox"/>	Name	Workflow	Site/List	Item	Status	Next Runtime	Triggers	Last Runtime	Result
<input type="checkbox"/>	broken schedule	errorOccured	MyList	All Items	Ready	3/02/2017 6:40:00 PM	Hourly	3/02/2017 5:40:00 PM	Completed with errors
<input type="checkbox"/>	new schedule	Convert InfoPath to PDF	Babuta forms	All Items	Ready	4/02/2017 1:00:00 PM	Daily	3/02/2017 1:00:03 PM	Completed
<input type="checkbox"/>	site schedule	MoveUserToOU	workflow2010	Single Item	Ready	4/02/2017 11:00:00 AM	Daily	3/02/2017 11:00:34 AM	Completed

### Creating Workflow Schedule

To create a workflow schedule, click “Create”.



Virto Products

EDIT LINKS

# Virto SharePoint Workflow Scheduler

Home

[Create](#) | [Refresh](#) | [Run!](#) | [Enable](#) | [Disable](#) | [Delete](#)

Now you need to define new schedule settings.

## Virto SharePoint Workflow Scheduler ⓘ

### Step 1. Name

Enter schedule name

Name:

- Enable  
 Run the workflow instance asynchronously.  
 Overwrite workflow

Select source:

 List (List Workflow)

 Site (Site Workflow)

### Step 2. Select source

Select list or site to take data from

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
- 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 a time trigger and define on which 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 ▼

6/5/2015

📅

11 AM ▼

00 ▼

One Time

In case you need to set a recurrence schedule, define required settings.

Time trigger:

Daily ▼

Start:

6/5/2015

📅

Recur every:

7

days

Moreover, you can start a workflow under specific account (workflows are run under **system account** by default).

Step 7. Start the workflow under specific account  
Select specific user

Enable
 

Nick Brook x



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

You can enable or disable a workflow schedule by checking the according boxes.

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

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

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

Use “Refresh” button to refresh data.

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

Select workflows and use “Run” button to start several workflows manually.

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

You can also click on workflow name to be redirected to workflow logs.

## Virto SharePoint Workflow Scheduler

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

<input type="checkbox"/>	Name	Workflow	Site/List	Item	Status	Next Runtime	Triggers	Last Runtime	Result
<input type="checkbox"/>	broken schedule	errorOccured	MyList	All Items	Ready	3/02/2017 6:40:00 PM	Hourly	3/02/2017 5:40:00 PM	Completed with errors
<input type="checkbox"/>	new schedule	Convert InfoPath to PDF	Babuta forms	All Items	Ready	4/02/2017 1:00:00 PM	Daily	3/02/2017 1:00:03 PM	Completed
<input type="checkbox"/>	site schedule	MoveUserToOU	workflow2010	Single Item	Ready	4/02/2017 11:00:00 AM	Daily	3/02/2017 11:00:34 AM	Completed

Here you can check the details and see all workflow logs.

<input checked="" type="checkbox"/>	Title	Started On	Ended On	Duration	Success	Details
<input type="checkbox"/>	Completed with errors	1/02/2017 1:51 PM	1/02/2017 1:51 PM	2 seconds	0 from 16	Details
<input type="checkbox"/>	Completed with errors	1/02/2017 1:52 PM	1/02/2017 1:52 PM	0 seconds	0 from 16	Details
<input type="checkbox"/>	Completed with errors	1/02/2017 2:11 PM	1/02/2017 2:11 PM	0 seconds	0 from 16	Details

## Site Workflows

Virto Workflow Scheduler allows users to create workflows not only within a SharePoint list but within a whole SharePoint site as well. This means that data will be taken from a 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)  
 Documents (Virto Products) ▼

Site (Site Workflow)  
 ▼

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

## Hourly Time Trigger

You can define the hourly time trigger for workflows. Just select “Hourly trigger” on the step 6 when you create or edit a workflow.




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
03/02/2017	v. 5.2.0	[+] Log folders are added [+] Do not stop a workflow with errors
03/27/2017	v. 5.2.1	[-] The "OneTime" schedules have been fixed
11/19/2020	v. 5.2.2	[*] The license manager has been updated
06/04/2021	v. 5.2.3	[-] Minor bug has been fixed