



# HarePoint Workflow Extensions for Office 365

For SharePoint Online (Office 365)

## Quick Start Guide



December 13, 2018

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## I. Introduction

### Description

HarePoint Workflow Extensions for Office 365 is a software product that expands the capabilities of SharePoint Designer to create workflows for SharePoint Online (Office 365). This brings completely new capabilities to your workflows, making possible a widest range of automation and management scenarios.

After successful installation, you will get around 200 custom actions available in SharePoint Designer along with the out-of-the-box actions. Moreover, you can get a freeware [HarePoint Workflow Designer](#) from SharePoint Store and create your workflow in visual editor.

### How it works?

Technically, all actions are executed in HarePoint cloud service;. The billing is based on **number of workflows** that use HarePoint actions. There are several billing plans available: 1 workflow, 5 workflows, 10 workflows, etc.

### Terms and definitions

#### **HarePoint Workflow Extensions for Office 365 billing account** (hereinafter **Account**)

This Account is used for billing purposes. With a **single Account**, you can use HarePoint Workflow Extensions for Office 365 on **one, several or all site collections** in your SharePoint Online tenant. You can also have **multiple Accounts, each for one or several site collections**. In this case, billing will be calculated for each Account individually.

Accounts are limited to certain SharePoint Online tenant. If you plan to use HarePoint Workflow Extensions on several SharePoint Online tenants, you would need at least one account for each of them.

## II. App downloading and deployment

### Prerequisites

In order to deploy HarePoint Workflow Extensions for Office 365, you need to:

- Have sufficient permissions to upload new apps to SharePoint **App Catalog** (usually it means you need to be a site collection administrator for App Catalog site collection)
- Be **site collection administrator** on your SharePoint Online site collections where you plan to deploy and use HarePoint Workflow Extensions.

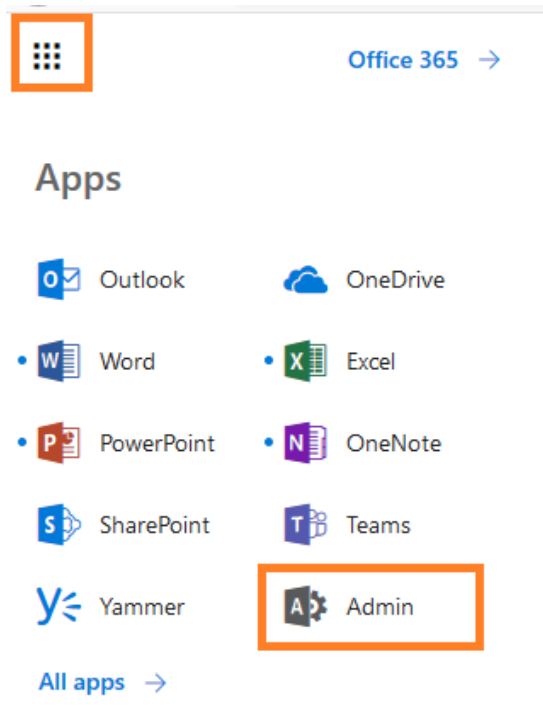
Tenant administrator privileges are not required to upload, deploy, install or use HarePoint Workflow Extensions

## Getting the app

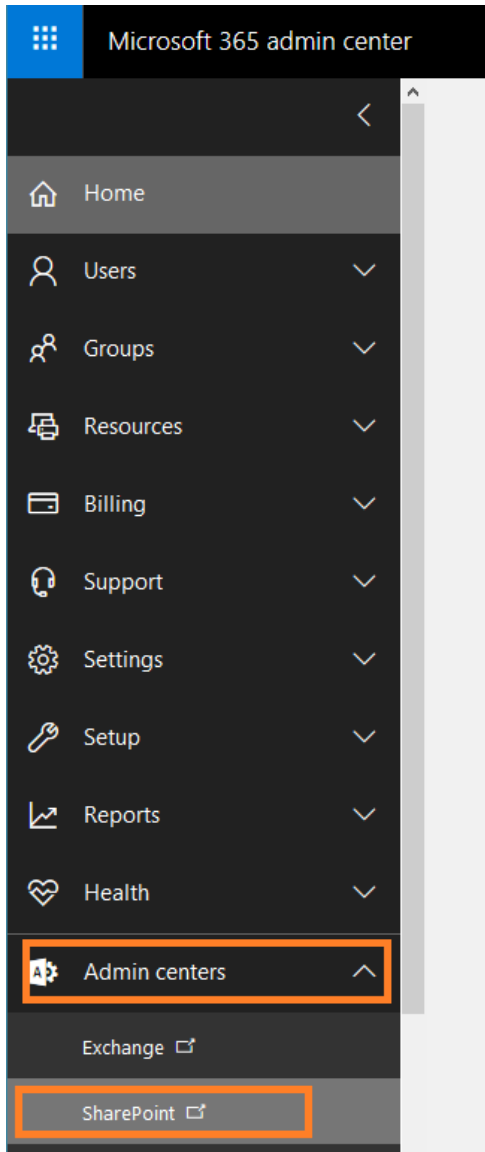
Download an app from HarePoint site using the following URL:

<https://www.harepoint.com/DownloadProducts/HarePointWorkflowExtensionsO365.app>

Open your **App Catalog Site**. To do this, go to **Admin** section of SharePoint Online:



Click on **Show more...** and select **Admin Centers – SharePoint**.



Click on **apps**:

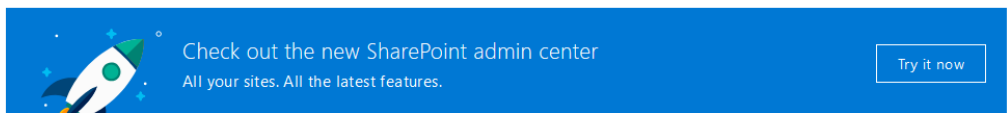
## SharePoint admin center

- site collections
- infopath
- user profiles
- bcs
- term store
- records management
- search
- secure store
- apps**
- sharing
- settings
- configure hybrid

Select **App Catalog**. If it does not yet exist, create it.

### SharePoint admin center

- site collections
- infopath
- user profiles
- bcs
- term store
- records management
- search
- secure store
- apps**
- sharing
- settings



Check out the new SharePoint admin center  
All your sites. All the latest features.

Try it now

### apps

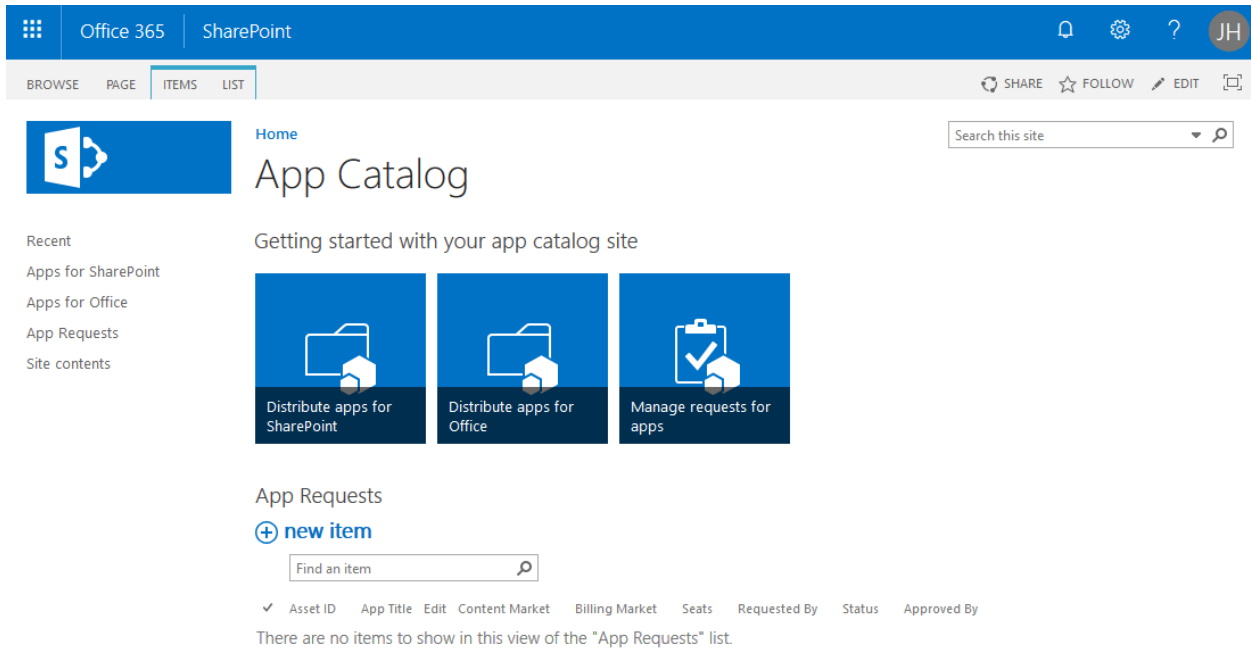
apps

**App Catalog**  
Make apps available to your organization and manage requests for apps. An app catalog is required to disable Store purchases for end users.

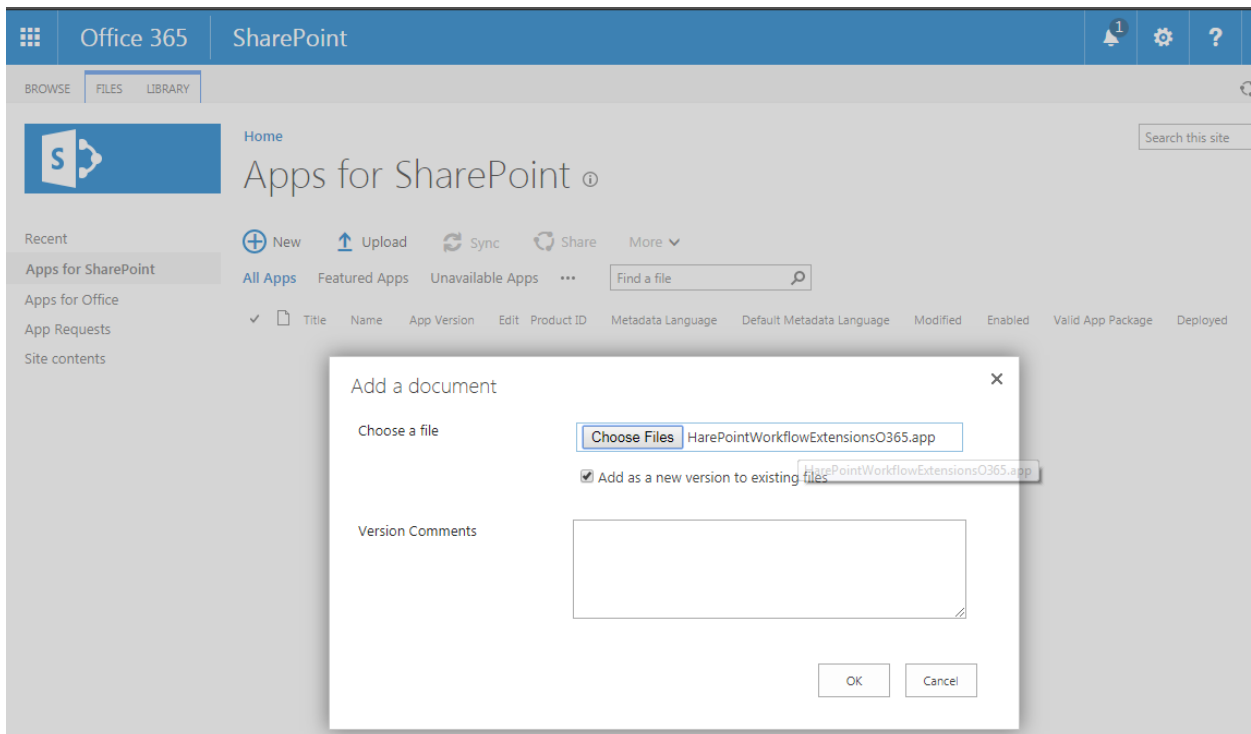
**Purchase Apps**  
Purchase apps from the SharePoint Store.

**Manage Licenses**  
Manage licenses for apps purchased from the SharePoint Store.

**Configure Store Settings**

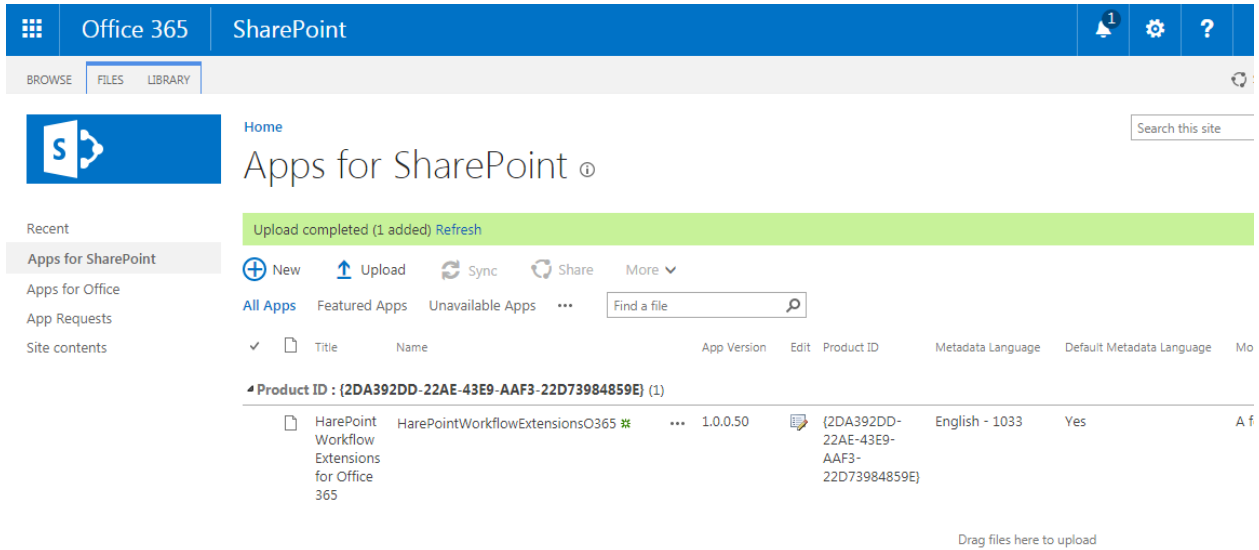


Open **Apps for SharePoint** in the left menu, click **Upload**:





Choose **HarePointWorkflowExtensionsO365.app** file on your disk and click **OK**:

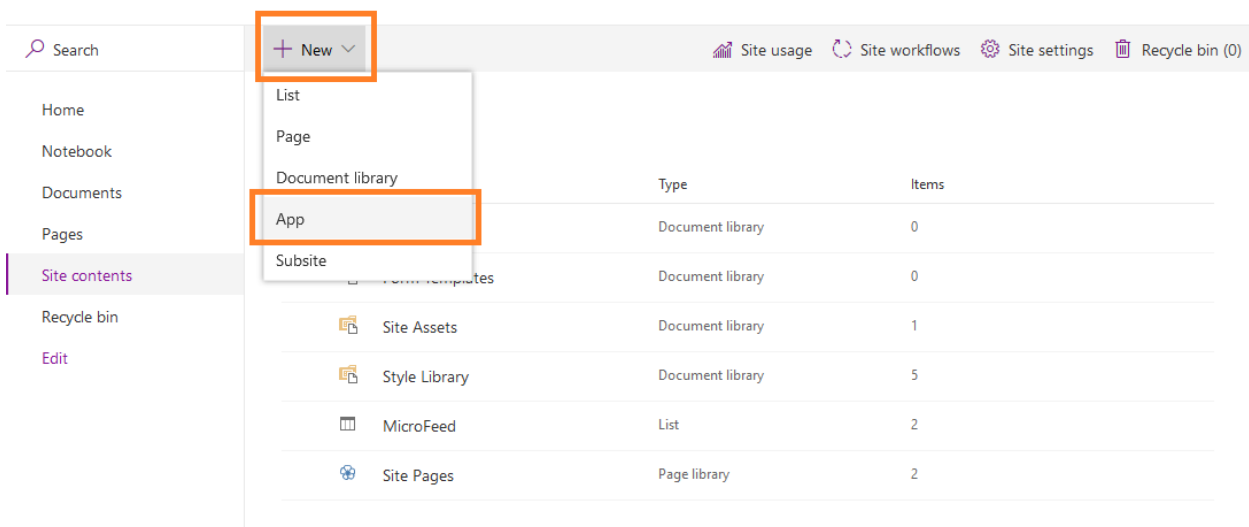


Now you can add **HarePoint Workflow Extensions for Office 365** to your site.

Access the root site of your site collection.

**Important note:** App needs to be added to a root site so it can be used for any site within this site collection.

Go to **Site Contents** on your site and click **New – App**:



In the **Apps you can add** section, click on **HarePoint Workflow Extensions for Office 365**:



Home [EDIT LINKS](#)

# Site contents ▸ Your Apps

- Your Apps
- Apps You Can Add**
- From Your Organization
- Manage Licenses
- Your Requests
- SharePoint Store

## Noteworthy



**Document Library**  
Popular built-in app  
[App Details](#)



**Custom List**  
Popular built-in app  
[App Details](#)



**Tasks**  
Popular built-in app  
[App Details](#)



**Site Mailbox**  
Popular built-in app  
[App Details](#)

## Apps you can add

Newest Name

**HarePoint Workflow Extensions for Office 365**  
[App Details](#)



**Document Library**  
[App Details](#)



**Form Library**  
[App Details](#)



**Wiki Page Library**  
[App Details](#)

Click **Trust It** in the pop up window:

Do you trust hwe.harepoint365.com?



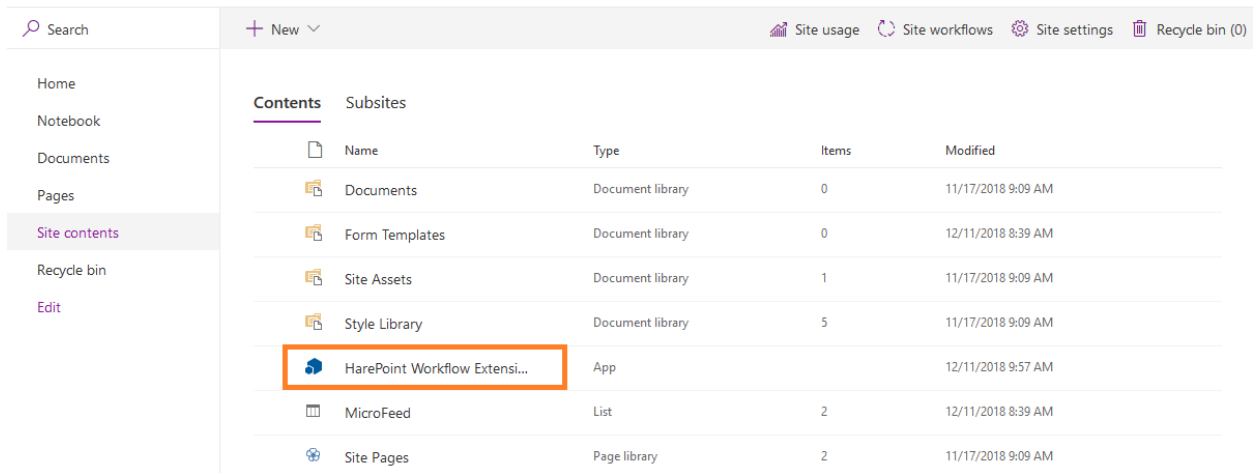
- Let it have full control of this site collection.
- Let it share its permissions with other users.
- Let it access basic information about the users of this site.



hwe.harepoint365.com

SHOW LANGUAGE OPTIONS

**HarePoint Workflow Extensions for Office 365** app will shortly appear under **Site Contents** on your site:



The screenshot shows the SharePoint 'Site contents' page. The left sidebar includes 'Home', 'Notebook', 'Documents', 'Pages', 'Site contents' (selected), 'Recycle bin', and 'Edit'. The main content area shows a table of site contents. The 'HarePoint Workflow Extensions' app is highlighted with a red box. The table has columns for Name, Type, Items, and Modified.

Name	Type	Items	Modified
Documents	Document library	0	11/17/2018 9:09 AM
Form Templates	Document library	0	12/11/2018 8:39 AM
Site Assets	Document library	1	11/17/2018 9:09 AM
Style Library	Document library	5	11/17/2018 9:09 AM
HarePoint Workflow Extensions	App		12/11/2018 9:57 AM
MicroFeed	List	2	12/11/2018 8:39 AM
Site Pages	Page library	2	11/17/2018 9:09 AM

## Specifying an Account

**Click on app** icon to proceed. The app will open and you will see HarePoint Workflow Extensions Management Console.

When the app is launched for the first time, the **Registration window** will pop up:

# HarePoint Workflow Extensions

## Registration

To start using the product, you need to enter a new billing account name.

Type an account name...

andrew

Register

At this point, you need to specify **what Account** (HarePoint Workflow Extensions billing account, see [Introduction](#) for more details) **this site collection should be connected to**. All the costs for the running workflow instances that use HarePoint Workflow Extensions will be charged for that Account.

You can either **create a new Account**, simply by typing the new Account name in the upper field, or **select from existing Accounts** (if there are any available) using the lower drop-down.

This Account can be changed afterwards in the settings.

**Note:** Please refer to complete Administrator Guide for more details on Accounts.

## Installing solution

**Note:** in order to be able to use HarePoint Workflow Extensions actions in SharePoint Designer, the solution need to be deployed, after an app is added.

At first time, in Management Console, you will see a warning that the solution is not installed yet:

The screenshot shows the management console interface for HarePoint Workflow Extensions. At the top, there is a navigation bar with 'Office 365', 'HarePoint Workflow Extensions', a help icon, and the user name 'John Hurley'. Below this is a header section with the HarePoint logo and the title 'HarePoint Workflow Extensions'. A red warning banner states 'Solution is not installed. Install.' Below the banner is a sidebar menu with options: Home, Actions, Statistics, Maintenance, Security, and SWITCH TO ACCOUNT. The main content area is titled 'Initial installation' and contains a blue instruction box: 'To start working with HarePoint Workflow Extensions for Office 365 you need to deploy the package to your site collection.' Below this is a progress indicator with five steps: 1. Welcome (selected), 2. Choose, 3. Ready, 4. Progress, and 5. Finish. The '1. Welcome' step is expanded to show five radio button options: 'Install' (Use this option to deploy workflow actions for the first time on the specific sites of the SharePoint Site Collection.), 'Change' (Use this option to change set of sites on this Site Collection where HarePoint Workflow Extensions actions are available.), 'Upgrade' (Use this option to upgrade workflow actions on sites of the current Site Collection where they are deployed.), 'Reinstall' (Use this option to retract and the deploy again HarePoint Workflow Extensions actions on the current Site Collection.), and 'Uninstall' (Use this option to retract HarePoint Workflow Extensions actions from the current Site Collection.).

Click on **Install** in the warning message, or select **Install** in the main section below on the page and click **Next**.

**At the step 2**, select **sites where HarePoint Workflow Extensions actions need to be available**.

**Note:** this can be not only the root site, but also several or all subsites. Make sure you checked the sites as needed.



## HarePoint Workflow Extensions

Solution is not installed. Install.

Home  
Actions  
Statistics  
Maintenance  
Security  
SWITCH TO ACCOUNT

### Initial installation

To start working with HarePoint Workflow Extensions for Office 365 you need to deploy the package to your site collection.

1. Welcome	2. Choose	3. Ready	4. Progress	5. Finish
------------	-----------	----------	-------------	-----------

Choose sites where HarePoint Workflow Extensions for Office 365 will be activated.

- / (MAPILab Team Site)

Click **Next** and review the summary before the Installation begins.

1. Welcome	2. Choose	3. Ready	4. Progress	5. Finish
------------	-----------	----------	-------------	-----------

Installing HarePoint Workflow Extensions version 0.9180  
HarePoint Workflow Extensions will be activated on these sites:  
1. <https://hwo.sharepoint.com/sites/test5> (test5)

Click **Next** to proceed with the installation:

1. Welcome	2. Choose	3. Ready	4. Progress	5. Finish
------------	-----------	----------	-------------	-----------

100%

21:31:17 Downloading latest version.  
21:31:22 Starting installation (version: 0.9180).  
21:31:38 Solution installed.  
21:31:38 Web test5 activating.  
21:32:08 Web test5 activated.  
21:32:08 Success

Click **Next** to review the installation results.

Click **Finish**.

### III. Management Console overview

Click on app icon to open Management Console for HarePoint Workflow Extensions for Office 365.

HarePoint Workflow Extensions Management Console has two modes:

- Site Collection management mode
- Account management mode

To switch between these modes, use **Switch to Account** and **Switch to Site Collection** links in the left pane.

## Site Collection management mode

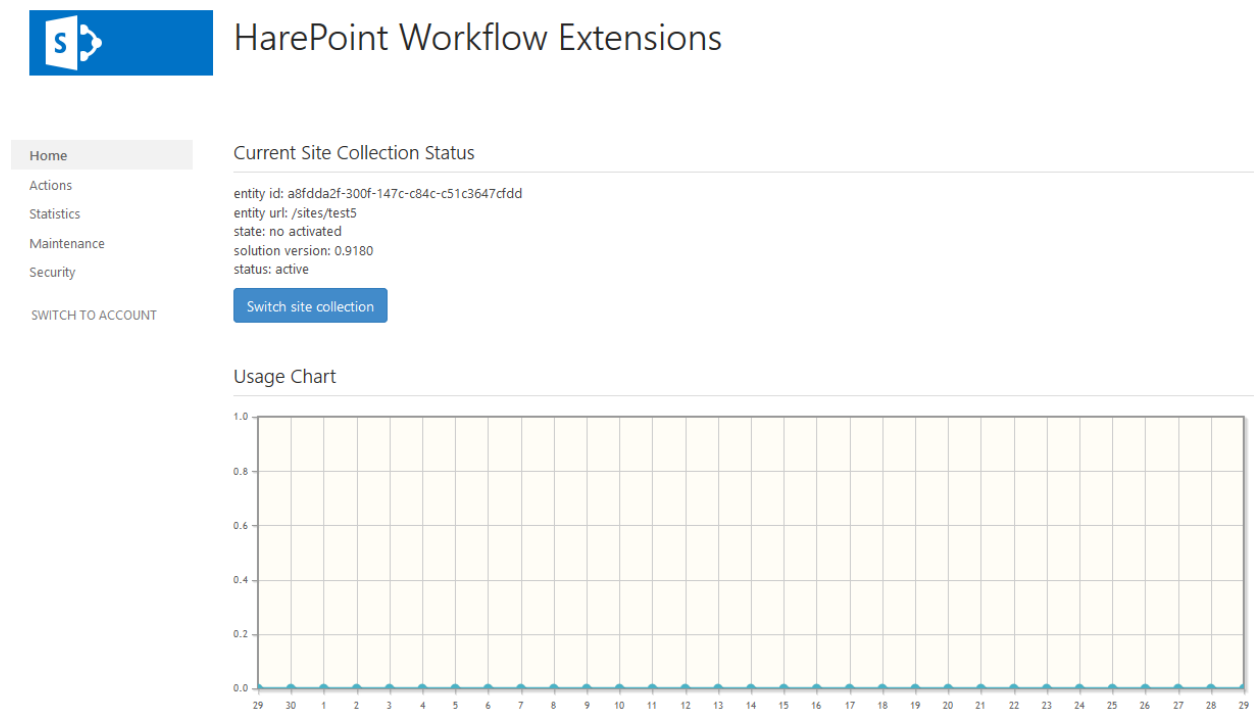
Each site collection where HarePoint Workflow Extensions for Office 365 app is added has its Management Console.

### Home

On this page you can review the **Current Site Collection Status**.

In particular, you can check the currently installed version of HarePoint Workflow Extensions, solution activation state.

The **Usage Chart** below represents how HarePoint Workflow Extensions actions are used in this specific site collection over the last month. The detailed information is available on **Statistics** page, see below.



### Actions

On this page you can browse a **list of available actions**, get the **detailed description** for each action.



- Home
- Actions
- Statistics
- Maintenance
- Security
- SWITCH TO ACCOUNT

Available Actions

 Type for search...

Title	Category	Weight
<a href="#">Accept Revision Changes in Word Document</a>	HarePoint Activities - Office	1
<a href="#">Activate Feature By GUID</a>	HarePoint Activities - Administration	1
<a href="#">Add an Item to a Dictionary</a>	HarePoint Activities - Dictionary	1
<a href="#">Add Content Type to List</a>	HarePoint Activities - Lists	1
<a href="#">Add Existing Column to Content Type</a>	HarePoint Activities - Lists	1
<a href="#">Add Language To Term Store</a>	HarePoint Activities - Taxonomy	1
<a href="#">Add New Row into Word Document</a>	HarePoint Activities - Office	1
<a href="#">Add Users to SharePoint Group</a>	HarePoint Activities - Administration	1
<a href="#">Add Users to SharePoint Site</a>	HarePoint Activities - Administration	1
<a href="#">Alternate CSS and Site Logo</a>	HarePoint Activities - Administration	1

Showing 1 to 10 of 188 entries

 records per page

 << 1 2 ... >>

## HarePoint Workflow Extensions Manual

- ▼ 1. Actions
  - ▶ 1. Administration
  - ▶ 2. Cloud Print
  - ▶ 3. Date/Time
  - ▶ 4. Development
  - ▼ 5. Dictionary
    - 5.1. Add an Item to a Dictionary
    - 5.2. Get Dictionary Item by Index
    - 5.3. Get Index of Dictionary Item
    - 5.4. Insert Dictionary Item at Index
    - 5.5. Remove Dictionary Item by Index
    - 5.6. Remove Duplicated Values from Dictionary

### 5.1. Add an Item to a Dictionary

This workflow action is used to add new item to the dictionary variable.

Changes can be made to an existing dictionary variable, or a new dictionary variable can be created.

**Note:** an item is always added to the **end** of the dictionary variable. In case of you need to insert an item to a **specific index**, use "Insert Dictionary Item at Index" action.

**See Also:** Understanding Dictionary actions in SharePoint Designer 2013 ( [http://msdn.microsoft.com/en-us/library/office/jj554504\(v=office.15\).aspx](http://msdn.microsoft.com/en-us/library/office/jj554504(v=office.15).aspx) )

Add **item** as **String** with **this name** to the end of the **dictionary variable**. Result at: **Variable: outputDictionary**.

**Parameters:**

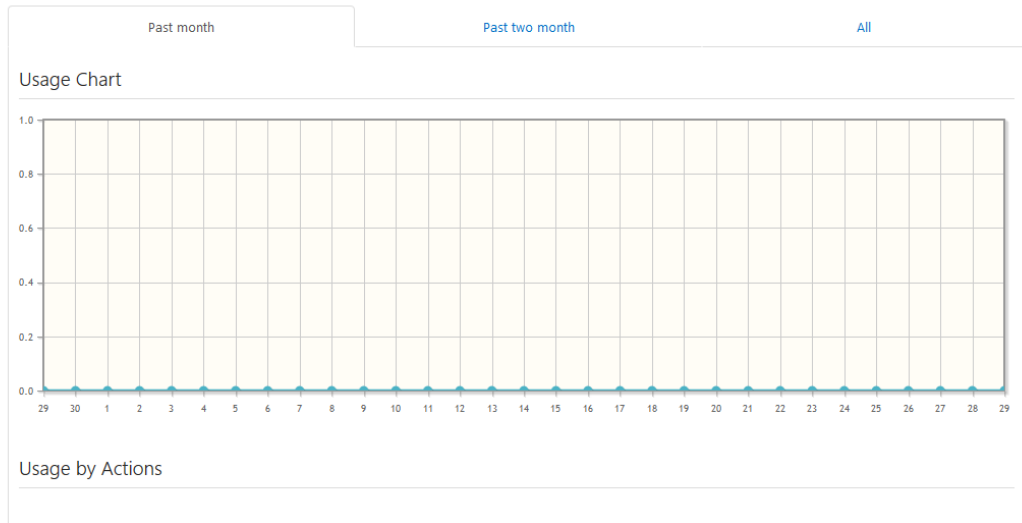
<b>item</b>	Text of variable of any supported type.
<b>String</b>	Type of the new dictionary item. The following types are supported: <i>Date/Time, Integer, Number, String, Boolean, Dictionary, Guid</i> .
<b>this name</b>	Name of the new dictionary item.
<b>dictionary variable</b>	the source dictionary variable.
<b>Variable: outputDictionary</b>	the target dictionary variable. The source dictionary variable can be specified here as well; in that case all changes will be made to it.

## Statistics

On this page you can review the detailed **Usage Charts**, including **Usage by Actions** chart.



- Home
- Actions
- Statistics
- Maintenance
- Security
- SWITCH TO ACCOUNT



### Maintenance

On this page you can **Install**, **Upgrade**, **Reinstall** and **Uninstall** the solution, as well as **Change** the sites in this site collection where HarePoint Workflow Extensions are installed. Select the required action (note that some actions might not be available at that moment), click **Next** and follow the instructions of the Wizard that will guide you through the whole process.



- Home
- Actions
- Statistics
- Maintenance
- Security
- SWITCH TO ACCOUNT

1. Welcome	2. Choose	3. Ready	4. Progress	5. Finish
------------	-----------	----------	-------------	-----------

**Install**  
Use this option to deploy workflow actions for the first time on the specific sites of the SharePoint Site Collection.

**Change**  
Use this option to change set of sites on this Site Collection where HarePoint Workflow Extensions actions are available.

**Upgrade**  
Use this option to upgrade workflow actions on sites of the current Site Collection where they are deployed.

**Reinstall**  
Use this option to retract and the deploy again HarePoint Workflow Extensions actions on the current Site Collection.

**Uninstall**  
Use this option to retract HarePoint Workflow Extensions actions from the current Site Collection.



## Security

On this page you can **generate tokens** to access various sites and services from a workflow with HarePoint Workflow Extensions.

You can also **encrypt** workflow values, tokens or credentials for improved security.

**Important note:** Please refer to complete Administrator's Guide for the detailed description of the functionality available on this page.



## / Security

- Home
- Actions
- Statistics
- Maintenance
- Security**

SWITCH TO ACCOUNT

### Access Token Generation

Current Site Collection
Generate access token for the current site collection
Office 365
Allows HarePoint to access Office 365 services, such as Exchange Online
Google
Allows HarePoint Workflow Extensions to access services assigned to specified Google account
Yammer
This token allows to access Yammer social networking service

### Encryption

Workflow value
Encrypt general workflow value.
Access Token
Encrypt any access token.
Login and Password
Encrypt login and password pair.
Reset encryption key
Use with caution!

## Account Management mode

Each Account has its individual HarePoint Workflow Extensions Management Console.

### Home

On this page you can review the **Licensing Status** for this Account, as well as the **Usage Chart** that represents how HarePoint Workflow Extensions actions are used over the last month.

**Note:** this is a **summary data** for **all site collections** connected to the given Account.

The detailed information is available on **Statistics** page, see below.



# HarePoint Workflow Extensions for Office 365

Account Home Page

- Home
  - Statistics
  - Billing
  - Roles
  - Site Collections
  - Tenant
- SWITCH TO SITE COLLECTION

## Licensing Status

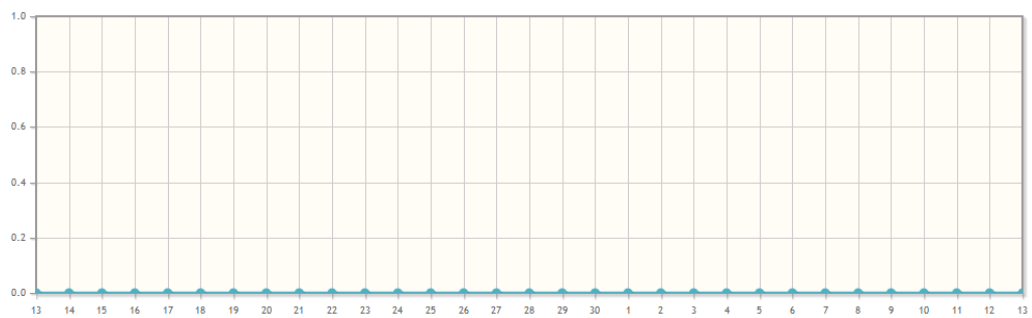
Current Plan: A1-Free Subscription (1 workflow) ([change...](#))  
Credits Included: Unlimited  
Billing Period: 31

30 days left  
Average Usage: 0.0 credits per day

Account ID: 39b3244b-09eb-4ba4-b111-efcaa1fc23cb  
Account Title: harepoint demo  
Date Purchased: 12/11/2018  
Current Billing Period: 12/11/2018 - 1/11/2019

[Switch an Account](#)

## Usage Chart



## Statistics

On this page you can review the detailed **Usage Charts**, including **Usage by Actions**.

**Note:** this is a **summary data** for **all site collections** connected to the given Account.



/sites/test3 > Statistics

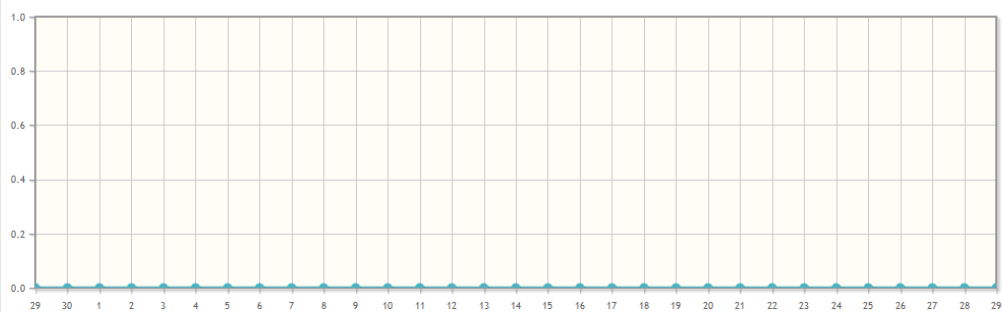
- Home
  - Statistics
  - Billing
  - Roles
  - Site Collections
  - Tenant
- SWITCH TO SITE COLLECTION

Past month

**Past two month**

All

## Usage Chart



## Usage by Actions

## Billing

On this page you can choose the **billing plan** and proceed with the payment, as well as review the **list of workflows** where HarePoint Workflow Extensions actions are activated.

### Billing plans



## harepoint demo › Billing

Home

Statistics

**Billing**

Roles

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Tenant

SWITCH TO SITE COLLECTION

### Change Billing Plan

Current plan: Trial

A1-Free Subscription (1 workflow)

Free of charge license allows operation with one workflow

A5 Subscription (5 workflows)

Plan with monthly billing, allows operation with up to 5 workflows

A10 Subscription (10 workflows)

Plan with monthly billing, allows operation with up to 10 workflows

A25 Subscription (25 workflows)

Plan with monthly billing, allows operation with up to 25 workflows

A50 Subscription (unlimited workflows)

Plan with monthly billing, the number of workflows is not limited

A5-365 Subscription (5 workflows)

One year subscription, allows operation with up to 5 workflows

A10-365 Subscription (10 workflows)

One year subscription, allows operation with up to 10 workflows

A25-365 Subscription (25 workflows)

One year subscription, allows operation with up to 25 workflows

A50-365 Subscription (unlimited workflows)

**Trial plan** is used to evaluate HarePoint Workflow Extensions for Office 365, within this plan you can use all the available actions for 30 days and in unlimited number of workflows.

With **A1-Free Subscription** plan, you can use all the actions except PDF conversion, only in one workflow. Click on this plan to switch to it:

## Change Billing Plan

Current plan: Trial	
A1-Free Subscription (1 workflow) Free of charge license allows operation with one workflow	<a href="#">Switch to Free Subscription</a>
A5 Subscription (5 workflows) Plan with monthly billing, allows operation with up to 5 workflows	
A10 Subscription (10 workflows) Plan with monthly billing, allows operation with up to 10 workflows	

Click on **Switch to Free Subscription**:

A1-Free Subscription (1 workflow) ×

Tell us about yourself. This information will help us serve you better.

First Name	John
Last Name	Hurley
Address	Blair st, 462
City	Toronto
Zip	M4B 3N6
Country	Canada
Company	HarePoint demo
Phone	+1 112 223 21 **
Email	JH@harepointdemo.com

[Switch to Free Subscription](#) [Cancel](#)

Fill in the form and click **Switch to Free Subscription**.

The billing plan will switch to **Freeware License** shortly.

If you need to run **more than one workflow** with HarePoint Workflow Extensions actions, choose the **paid subscription plan**.

You can choose an appropriate plan and proceed to payment right from the management console via **2Checkout** (part of Avangate) provider.



A5 Subscription (5 workflows)  
Plan with monthly billing, allows operation with up to 5 workflows

Pay via 2Checkout

Click on **Pay via 2Checkout** button to proceed. You will be forwarded to our payment provider page. Multiple payment methods are supported.

## List of Active Workflows

Under the list of billing plans, there is a **List of Active Workflows**:

### List of Active Workflows

Name	Web URL	Last time used	
Test workflow	https://harepointdemo.sharepoint.com/	2018-12-13 17:34:00	Forget

This list will only contain the active workflows – the ones that contain HarePoint Workflow Extensions actions and that are allowed to run according to the currently selected billing plan.

For example, the **Free Subscription** only allows using HarePoint actions in **one workflow**. That is, there is only one slot available in the **List of Active Workflows** for this plan.

If you need to make another workflow active (applicable for any plan), do the following:

- Click **Forget** button for a workflow in a list that you would like to deactivate. The workflow itself will not be removed, it just will be deactivated for HarePoint Workflow Extensions.
- Start a workflow that you need to activate in HarePoint Workflow Extensions.
- That's it. Refresh the **Billing** page to make sure the workflow you've started now appeared in the **List of Active Workflows**.

**Note:** Workflows that do not contain HarePoint Workflow Extensions actions will not be appearing in the List of Active Workflows.

## Roles

On this page you can define the **Account Managers** – the SharePoint Online user accounts that will be permitted to perform all actions on the Account.

By default, Account Manager is the user account you have been logged in when you were creating this Account.

You can optionally specify **Account Viewers** which can only view Account information, but not able to make any changes.

You can optionally enter **e-mail addresses** to receive **usage and billing notifications**.

**Note:** Account Managers are subscribed to these notifications **by default**.



## harepoint demo ▸ Roles

Home

Statistics

Billing

Roles

Site Collections

Tenant

SWITCH TO SITE COLLECTION

### Roles for an Account

#### Account Managers

Account managers can perform all operations on the account.

[John Hurley](#) x

#### Account Viewers

Account viewers can view settings, usage and billing information.

Enter names or email addresses...

#### Notification E-Mails

List of e-mail addresses to receive usage and billing notifications. Account Managers are already subscribed to these notifications.

[jhurley@harepointdemo.onmicrosoft.com](mailto:jhurley@harepointdemo.onmicrosoft.com) x

Save Changes

**Important note:** Please refer to complete Administrator's Guide for more details on Roles for an Account.

### Site Collections

On this page you can review the site collections connected to this account.

You can also **manage** site collections: **connect new site collections**, or **disconnect the existing ones**.

**Note:** All the costs for running workflows that contain HarePoint Workflow Extensions actions will add up and will be charged to this Account.



## harepoint demo ▸ Site Collections

Home

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Tenant

SWITCH TO SITE COLLECTION

### Connected Site Collections

Type site collection url...

Connect

Search

Type for search...

URL

State

Action

<https://harepointdemo.sharepoint.com>

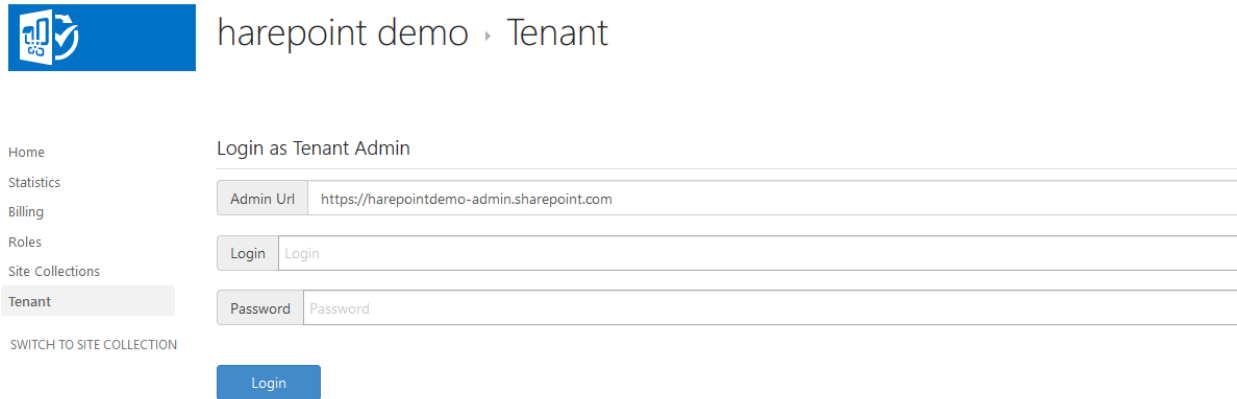
Get state

Disconnect

## Tenant

On this page SharePoint Online tenant administrator can perform certain **high-level operations**, such as merge all Accounts for all site collections in this tenant into one.

**Important note:** Please refer to complete Administrator's Guide for more details on tenant administrator capabilities.



Home

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Site Collections

**Tenant**

SWITCH TO SITE COLLECTION

Login as Tenant Admin

Admin Url

Login

Password

Login

## IV. Creating a first workflow

Now, the product is installed and initial configuration is completed. We can create a first workflow that will use HarePoint Workflow Extensions. The workflows are created using the standard tool – SharePoint Designer.

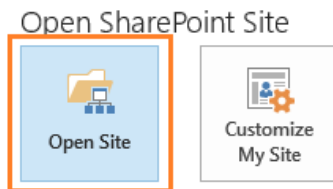
### Scenario

We will create a simple list workflow for **Documents** library **on one site collection** that will log newly added documents to **Documents Log** list **on another site collection**. Generally speaking, users that add documents do not have permissions for the target site collection, so we will **impersonate** as site collection administrator of the target site collection to be able to create list items there.

This example will demonstrate how to use actions from HarePoint Workflow Extensions, and how to generate and use token to connect to another site collection and act on behalf of another user.

### Connecting SharePoint Designer

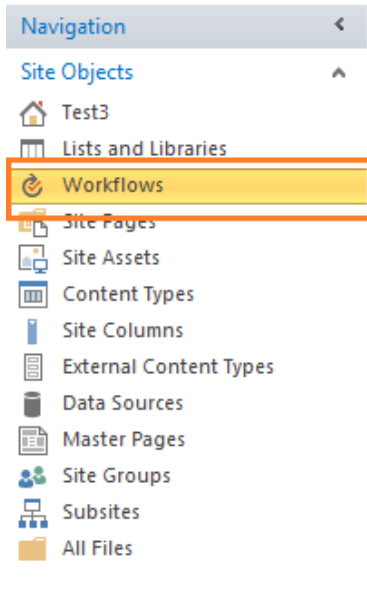
Launch **SharePoint Designer** and click **Open Site**:



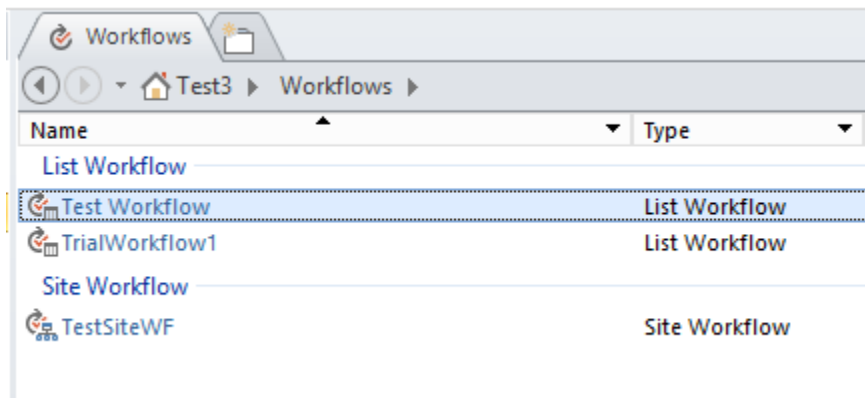
Enter the site URL for the **first site collection** (where **Documents** library located).

**Note:** The site URL should start with **https://**

Click on **Workflows** in the **Navigation** pane:



Your existing workflows (if any) will be displayed in the right pane:

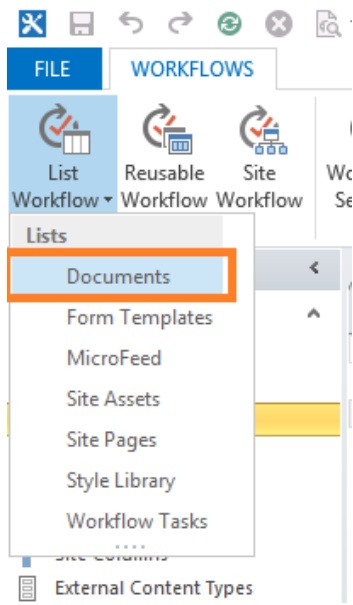


## Creating a workflow

In our example, we will create a new List Workflow.

On the ribbon, click **List Workflow** and point to **Documents** library.





Enter the **name** for the new workflow.

New workflow will be created and opened for editing.

### 1. Impersonation

First, we need to impersonate as site collection administrator of the target site collection. For that, we will use **Set Authentication** action.

Use [this token or login and password](#) to authenticate to [this](#)

This action accepts either a **token generated by a user to impersonate as**, or **encrypted credentials of the user to impersonate as**. Both can be obtained from HarePoint Workflow Extensions Management Console – **Security** section.

In our example, this needs to be performed by **John Smith**, the **target site collection administrator**.



## / Security

- Home
- Actions
- Statistics
- Maintenance
- Security**
- SWITCH TO ACCOUNT

### Access Token Generation

<b>Current Site Collection</b> Generate access token for the current site collection
Office 365 Allows HarePoint to access Office 365 services, such as Exchange Online
Google Allows HarePoint Workflow Extensions to access services assigned to specified Google account
Yammer This token allows to access Yammer social networking service

### Encryption

Workflow value Encrypt general workflow value.
Access Token Encrypt any access token.
<b>Login and Password</b> Encrypt login and password pair.
Reset encryption key Use with caution!

John Smith goes to **Access Token Generation – Current Site Collection**:

Specify a Site ×

SharePoint Site Url	https://fwo.sharepoint.com/sites/test3
---------------------	--

[Generate token](#)

Types in the **site collection URL**, clicks **Generate Token**:

```
eyJUeXBlljoyLCJ1c0Vud3J5cHRlZCI6ZmFsc2UsIkRhdGEiOiJleUpTWldaeVpYTm9WRzlyWic0aU9pSkprVUJzLCJ1c290dvd2JFUkphV3h1Ij09WyprSl djblYxWnpKQzLCJ1U5OMHh6ZFhGMFNPMDFWMk5TTJja3QzcnhWEJ4ZERGemv04h3GN4UzFseFkzStVjLCJ4J0RaNmNXSTNSamRuU3pkVkl1USl0IiwiaWNGJGTkRlbg8xY3p1Ij09RnRwWkhjbGgzZGpou004YliM1kyTUvjMW1iFXbGszUVRcVFFVaHh1siLCJ1OTFpESkkrkVzLCJ1d29weFITMFpYVC1UOYTjRWVlZLCJ4MloxahRWa1puZWpScdRFVku01hV0VKUGMzZFl0IiwiaWMs5M2NFUTVaRlJlV1VaK004NhbFp6VFRoUWFFV5kRXh4TVjLCJ1drOVFV5WvVlku026bEZNbUp1Wpod2JGRkxjbEsiLCJ15hbG9OMnBOWkhwUFdhiLCJ1Qa3QzTjNGcU5sv01a05rVfdFe17HVTakJlVjBOMk9Wwkv004hsWJsbGFaeUlzSv02FXVnVkrWxrS WpvaU9XUTBa04WVRNdFlqWTVpQzAwTldFNUs01Fl0WkrBd01ESm1001J1TW1FMElPd2ITWE56ZFdwa01mxJam9pWEM5RVlYUmxLREUwi krjd01USTNPRFF4TnpBcfhDOGIMQ0pWY21raU9pSms04Y3pvdkwyadNieTV6YUdGeVpYQnZhVzUwTG1OdmJT OXphWfJsY3k5MfYtJbNeThpZIE9PSJ9
```

Then copies the displayed token and transfers it securely to workflow author.

**Alternatively**, John Smith can encrypt his credentials using **Encryption – Login and Password**:

Encrypt Login and Password ✕

---

Login

Password

John types in his credentials, clicks **Encrypt**:

```
Success
eyJUeXBlljo1LCJ1c0Vud3J5cHRlZCI6dHU1ZSswiRGE1Si6InpRdHlyZ0tydU52STMzbEpEzYtq Qk9PT2N2b0ZSU104O9xMnxbGY5c1ZtbUNrd0gzLCJ1U5MUN1a2c2cWNoMmo4bmM1YTdNbDh2bEZWUWU004NTQ0MjJFdmthdFAxUkV1RWNo01i6dQMXhPKzJrbVNRWll6eVhXdhJNNm51eGVUTDhva01i7041pXa0dZRG5wd3AzRTRoeEFLS01i0ZHYWNTNkU1SE1LUWQwS3VFeFN5NUU2aVJyUSJ9
```

Copies the displayed code and transfers it securely to the workflow author.

**Note:** these two methods work only when **both site collections are in the same tenant**. If they are not, **External SharePoint site** option should be used. Please refer to Administrator Guide for more details.

Now we can **paste** the token or code obtained from John Smith to a workflow action, first parameter; in the second parameter select **SharePoint site**:

Use [eyJUeXBlljoyLCJ1c0Vud3J5cHRlZCI6ZmFsc2UsIkRhdGEiOiJleUpTWldaeVpYTm9WRzlyWic0aU9pSkprVUJzLCJ1c290dvd2JFUkphV3h1Ij09WyprSl djblYxWnpKQzLCJ1U5OMHh6ZFhGMFNPMDFWMk5TTJja3QzcnhWEJ4ZERGemv04h3GN4UzFseFkzStVjLCJ4J0RaNmNXSTNSamRuU3pkVkl1USl0IiwiaWNGJGTkRlbg8xY3p1Ij09RnRwWkhjbGgzZGpou004YliM1kyTUvjMW1iFXbGszUVRcVFFVaHh1siLCJ1OTFpESkkrkVzLCJ1d29weFITMFpYVC1UOYTjRWVlZLCJ4MloxahRWa1puZWpScdRFVku01hV0VKUGMzZFl0IiwiaWMs5M2NFUTVaRlJlV1VaK004NhbFp6VFRoUWFFV5kRXh4TVjLCJ1drOVFV5WvVlku026bEZNbUp1Wpod2JGRkxjbEsiLCJ15hbG9OMnBOWkhwUFdhiLCJ1Qa3QzTjNGcU5sv01a05rVfdFe17HVTakJlVjBOMk9Wwkv004hsWJsbGFaeUlzSv02FXVnVkrWxrS WpvaU9XUTBa04WVRNdFlqWTVpQzAwTldFNUs01Fl0WkrBd01ESm1001J1TW1FMElPd2ITWE56ZFdwa01mxJam9pWEM5RVlYUmxLREUwi krjd01USTNPRFF4TnpBcfhDOGIMQ0pWY21raU9pSms04Y3pvdkwyadNieTV6YUdGeVpYQnZhVzUwTG1OdmJT OXphWfJsY3k5MfYtJbNeThpZIE9PSJ9](#) to authenticate to [SharePoint site](#)

## 2. Creating a new List Item

After we gained access to the target site collection, we can **create a list item** in **Document Log** list. For that, we use **Create List Item at URL** action:

then **Create list item with specified values at this list URL** . Store new list item URL in **Variable: itemUrl** .

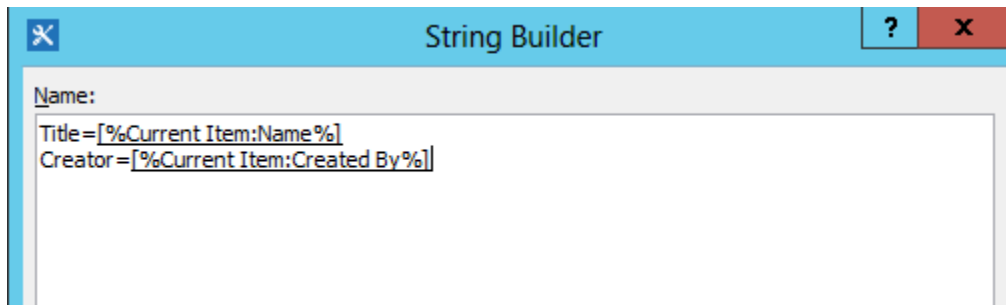
In **specified values**, we need to specify the values the new list item should contain. We will fill two columns: **Title** and **Creator**.

### Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Title	Single line of text	✓
Creator	Person or Group	
Modified	Date and Time	
Created	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	

This is how the **String Builder** for this parameter will look like (use **Add or Change Lookup** button to paste the values **[%Current Item:Name%]** and **[%Current Item: Created By%]**):



In the second parameter, **this list URL**, put the full URL of the target list. It should look as follows:

<https://hwo.sharepoint.com/sites/test3/Lists/Document Log/>

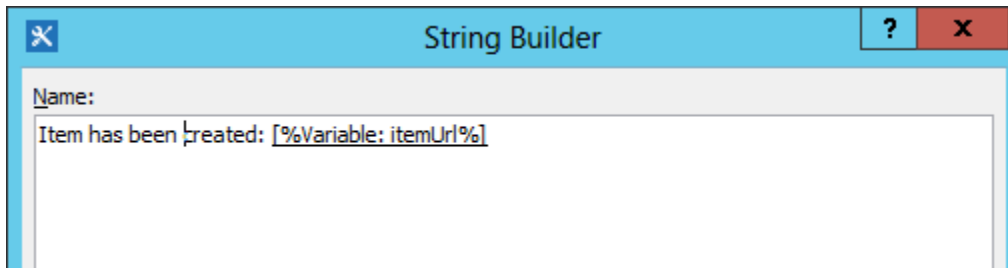
**Note:** It should **not** contain *Allitems.aspx*, hashes (#) or anything like this.

## 3. Logging the result

After the item has been created, we can **log a message** confirming this to workflow history. We will use **Log to Workflow History** action for this:

then Log [message](#) to the workflow history list.

In our case, the message is:

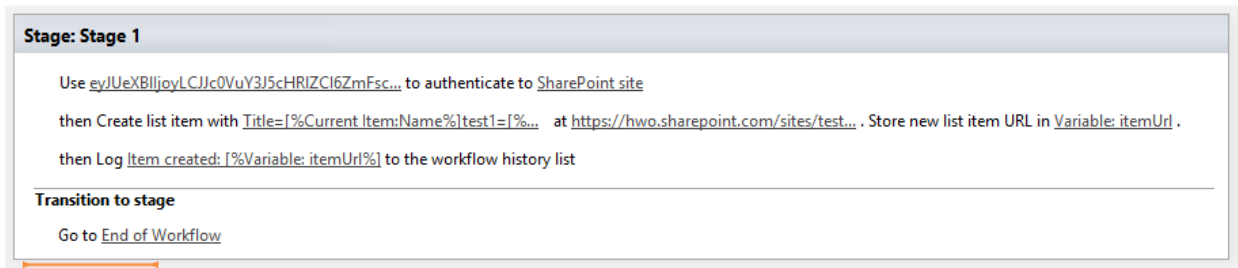


(use **Add or Change Lookup** button to paste [%Variable: itemUrl%]).

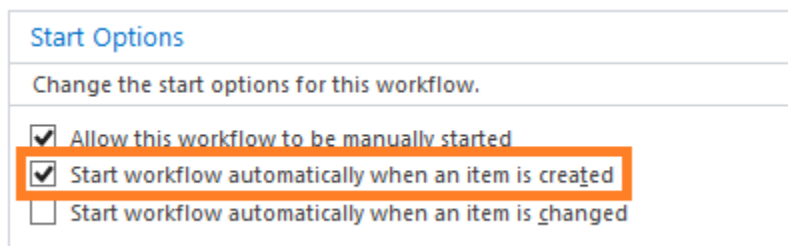
In **Transition to stage** set **Go to End of the Workflow**.

#### 4. Summary and launch options

Finally, the workflow looks like this:



Go to workflow options in SharePoint Designer and check **Start workflow automatically when an item is created**:



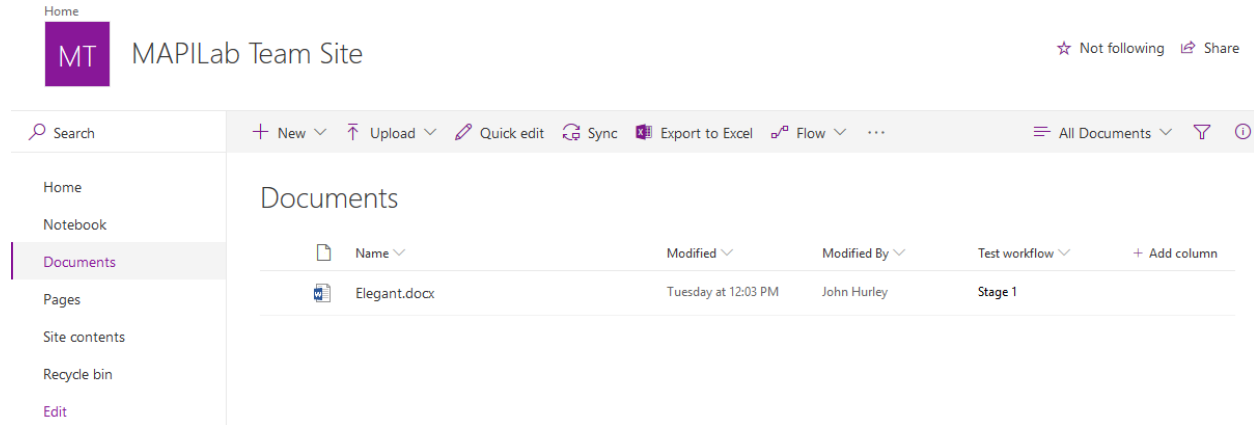
**Save** and **publish** the workflow.



## 5. Testing the workflow

Let's test the workflow.

Go to **Documents** library on a first site collection, and upload a document there:



The screenshot shows the 'Documents' library in the 'MAPI Lab Team Site'. The document 'Elegant.docx' is listed with a 'Test workflow' status of 'Stage 1'. The interface includes a search bar, navigation pane, and a toolbar with options like 'New', 'Upload', 'Quick edit', 'Sync', 'Export to Excel', and 'Flow'.

In our case it's *Search Guide.txt*:



The document card for 'Search Guide' shows it is in 'Stage 1' of a workflow. It also indicates it was modified 'About a minute ago' by 'Andrey Karpin'.

Click on **Stage 1** to get more details on a workflow status:

Workflow Information (Workflow Health)

**Initiator:** Andrey Karpin  
**Started:** 11/8/2015 11:11 PM  
**Last run:** 11/8/2015 11:11 PM  
**Document:** Search Guide  
**Internal Status:** Completed  
**Status:** Stage 1

Workflow History

The workflow recorded these events.

Date Occurred	Event Type	User ID	Description
11/8/2015 11:11 PM	Comment	Andrey Karpin	Item created: <a href="https://hwo.sharepoint.com/sites/test3/Lists/Document Log/4_000">https://hwo.sharepoint.com/sites/test3/Lists/Document Log/4_000</a>

As you can see, the item has been created successfully in a target site collection.

We can ask John Smith, the target site collection administrator, to check the list:

Office 365

Test3 EDIT LINKS

Document Log

new item or edit this list

All Items Find an item

Title	Creator
Example	Andrey Karpin
Search Guide	Andrey Karpin

Created at 11/8/2015 1:12 PM by Hwe 365 on behalf of John Smith

Last modified at 11/8/2015 1:12 PM by Hwe 365 on behalf of John Smith

Close

As you can see, the new item for Search Guide document has been successfully created by HarePoint Workflow Extensions Online on behalf of John Smith.

## Appendix A. Further questions

In case if you have any further questions, please do the following:

- Refer to full **Administration Guide** for HarePoint Workflow Extensions for Office 365 for the detailed information
  - Create a **ticket** in our **HelpDesk** on <https://www.harepoint.com/Support>
- OR**
- Send us an **e-mail** to [support@harepoint.com](mailto:support@harepoint.com)