



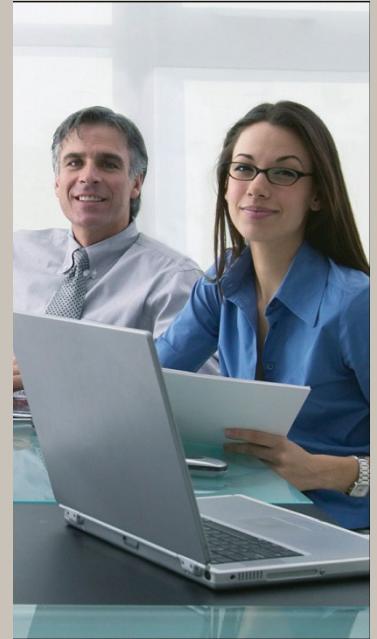
Workflow with Microsoft Office SharePoint Server 2007

Executive Summary

Over the last decade, business process management solutions have been gaining considerable momentum as organizations are struggling to maintain consistency and efficiency in executing their core business processes. Workflow for automating formal business processes has been built into enterprise solutions and line-of-business applications, and business process management point solutions have emerged for more comprehensive process management capabilities. Despite these advancements in business process management technologies, workflow and business process management solutions are typically used to address only a small percentage of the work that is done within an enterprise. By focusing exclusively on highly structured business processes designed by a small number of employees, organizations have historically neglected to address and enable the less formal and more iterative work that is completed by the vast majority of employees.

As our reliance on collaborative information sharing continues to increase, companies have begun to shift their focus towards more flexible solutions that can bridge the gap between formalized, structured process execution and individual activities. Companies have developed an increased understanding that the activities of all workers exist within the context of a larger business process, but the everyday actions of most employees take place outside of formal systems, like authoring and reviewing documents or ad-hoc processes managed via e-mail. Today, these common activities are conducted in an ad-hoc manner with little visibility and connectivity across silos. As a result, individuals are working less efficiently and the effectiveness of key processes is diminishing.

Microsoft has responded to these industry challenges by providing the Microsoft® Office SharePoint® Server 2007 Workflow solution that delivers highly flexible tools like InfoPath Forms Services for data collection and workflow interaction and SharePoint® Designer for easy workflow design and customization including robust out of the box features to enable the rapid deployment and adoption of business process solutions across the enterprise. By supplementing formalized process execution with collaborative human interaction, employees can work more effectively in the context of the larger goals of the enterprise.



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Microsoft Office SharePoint Server 2007

Workflow Solution

Microsoft® Office SharePoint® Server 2007 is the foundation of an optimized business productivity infrastructure—the first comprehensive approach to solving the problems that people encounter in the unstructured world of work. Rather than treating information management and access, collaboration, and people-driven processes as isolated challenges, Office SharePoint Server 2007 encompasses the whole continuum of unstructured work as a single set of related services that provide a single, strategic approach. This offers several significant benefits:

- **Simplicity** for end users, who can leverage their familiarity with Office-based applications and the browser environment for all their information-work activities, regardless of their role or task.
- **Value and governance** for IT, which only needs to support a single set of technologies to enable comprehensive capabilities across the enterprise.
- **Speed and flexibility** for the business, which can customize and extend the platform quickly and easily at a variety of levels from personalization to enterprise application development.
- The **security and scalability** of a platform built for the enterprise.

The workflow solution included in Microsoft® Office SharePoint® Server 2007 helps businesses bring together people, processes, and information by providing an enterprise platform for enabling workflow. By helping businesses to automate common processes and include ad-hoc and unstructured activities, organizations can improve the effectiveness of their business processes while dramatically decreasing the cost associated with managing these processes.

WHY WORKFLOW?

Today, despite many organizations' considerable investments in both information technology (IT) systems and human talent, results can still fall short of expectations. This is because a gap exists between the types of structured, predictable processes that are supported by traditional IT solutions and the real work that people do day-to-day in terms of finding and sharing information, working together in teams, and performing routine tasks that rarely justify dedicated IT investments to automate.

These sorts of unstructured activities are not as easy to measure as transaction-based work, so it can be hard to recognize how ineffective processes in these areas can slow innovation and customer-facing processes, produce errors, inhibit teamwork and information sharing, cloud visibility, reduce morale, and generally squander the organization's investment in both people and systems. Also, because few IT systems have focused on trying to solve these problems in a strategic way, IT decision makers have

been forced to view them as discrete processes to be solved with stand-alone systems such as portal sites, search engines, business intelligence systems, and content management solutions, rather than as a single problem of organizational productivity requiring a comprehensive IT investment strategy.

As our dependence on information and collaboration to perform individual roles increases, organizations continue to struggle with finding a simple, flexible solution for managing information-rich processes driven by individual interaction. This challenge is further compounded by the fact that the solutions that do exist place undue burden on IT resources and are difficult to adopt broadly across the enterprise.

Workflow Challenges

Because of this increasing complexity, many organizations are experiencing challenges with developing flexible workflow solutions, for example:

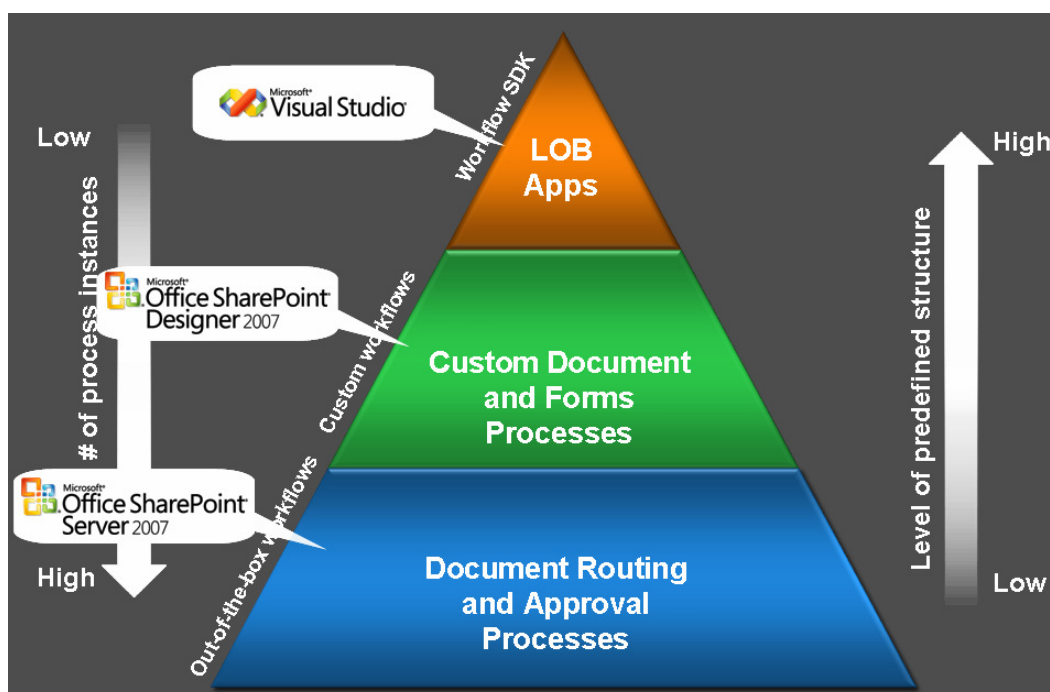
- **Disconnected work performed in silos.** Although almost all work that is performed in an enterprise is in support of a key business process, the work is often unstructured that exists outside of formal systems. As a result, work is performed in a disconnected way, leading to inefficiencies and the potential for duplicated work. In addition, these information workers perform their individual activities without context, meaning they work without understanding their significance in addressing enterprise goals and priorities.
- **Lack of flexible, agile solutions leveraging common tools.** Traditional workflow solutions require users to learn new systems in order to participate in business processes. As a result, these solutions frequently experience low adoption rates across the enterprise largely due to usability and lack of integration issues with commonly used tools like e-mail and Office. Information workers want to be able to participate in workflows within familiar tools and simple interfaces.
- **Basic forms lack functionality.** Businesses have numerous forms and solutions for forms in use, but these forms and solutions lack much functionality. Forms on paper can be rich visually but are extremely inefficient. Solutions built to support electronic forms today require additional client side applications and additional infrastructure requirements. These electronic forms are difficult to validate, especially when the validation requires data from some of the company's core applications. Also, synchronization of this data needed by the forms requires custom integration and is not something the business can manage without a lot of help from IT.
- **Heavy reliance on manual execution of simple processes.** Information workers spend a great deal of time driving simple business processes such as approvals, collecting feedback, or signatures on a document. This manual execution is error prone due to lack of validation and corporate governance is at risk due to overall informal process structure.

- **IT organizations are fully burdened and unable to support informal process execution.** Today's IT professional is overburdened with developing and supporting mission-critical, enterprise technology solutions. Therefore, they are unable to support the development and maintenance of informal process automation. In many cases, the time and effort to build one-off solutions outweighs their value to the organization. Because the business does not have the tools to create their own workflow and form solutions, they must rely on IT resources with conflicting priorities.

Connect People, Process and Information

The challenges above can be addressed by empowering people to do more in their roles by better connecting them to the people, processes, and information they need to do their jobs. Because IT is not scaled to support individual business processes, most people use Outlook to complete tasks. These document processes do not have and should not have much predefined and fixed process structure. But the sheer volume and pervasive nature of these processes make them a critical component of connecting people, process, and information to improve business performance.

Microsoft Office SharePoint Server 2007 workflows provide a solution that can be a much richer and more scalable alternative to e-mail as a workflow engine and tracking mechanism. By empowering users with the structure they need to perform these processes while retaining the flexibility and agility they currently have, Office SharePoint Server 2007 can help people work more effectively and efficiently.



The Office SharePoint Server 2007 workflow solution connects people, process, and information by helping organizations:

- Enable people ready processes through workflow.
- Increase IT manageability and efficiency.
- Simplify human interaction through usability.
- Integrate and extend workflow solutions.

ENABLE PEOPLE READY PROCESSES THROUGH WORKFLOW

Organizations rely on formal and informal business processes in order to complete their everyday work. While those processes often involve software, the most important processes in many organizations depend on people.

Focus on people at the core of business processes

Traditional line-of-business and business process management solutions focus on highly formalized processes designed by a small number of developers. In these cases, the focus is typically on modeling, automating, and monitoring the process itself. While this is an important component in improving process execution, these solutions miss opportunities to optimize human efficiency and effectiveness. Office SharePoint Server 2007 workflows provide tools that extend business processes to all employees.

Broad participation of information workers in workflow. Broad user adoption of workflow tools that support common tasks typically done in Outlook or through informal channels is a major challenge. Success depends on several key factors: minimizing the change to an information worker's daily activities, simplifying the ways in which individuals can initiate and participate in workflows, and using easy tools to manage and modify workflow processes. With Office SharePoint Server 2007 and integration with Microsoft® 2007 Office and Microsoft® Office SharePoint® Designer, it is simple for users to design, participate in, and manage workflow processes, thus enabling the goal of broad user adoption.

Empower business users to take ownership of the end-to-end process. Office SharePoint Server 2007 empowers knowledge workers to develop, deploy, manage, and monitor workflows without requiring assistance from IT. Business users can leverage out of the box workflows and use tools like SharePoint Designer to define workflows and can also change the workflow, if necessary, to meet business needs. Office SharePoint Server 2007 provides tools and reporting to allow tracking of status and overall analysis of workflows, including number of workflows operating at a current time, processing time of events, and success or failures in the workflows.

Shift from ad-hoc to process-driven tasks

Office SharePoint Server 2007 can help companies move from ad-hoc activities to more process-driven tasks. As tasks are executed within the context of the larger business process, the work becomes less disconnected and users are able to execute these tasks with a stronger understanding of their context within the business process.

Reduce the amount of disconnected and duplicated work. When business activities are performed in an ad-hoc manner, the likelihood of duplicative work across the organization increases. By connecting workers to business process and providing greater visibility to the activities of other individuals, Office SharePoint Server 2007 can help prevent inefficient redundant work. Providing alerts and notifications to users in Microsoft® Office Outlook® 2007 allows people to know which activities they should perform. Workers can continue to utilize the familiar Office tools their tasks require and be part of a workflow without even realizing they are in fact working in a more connected manner.

Execute tasks within the context of a larger business process. Many workers executing tasks day-to-day are not aware of how their activities fit within the greater business process. Office SharePoint Server 2007 users can include these day-to-day tasks, done using the 2007 Office system, within the workflow and thereby allowing information workers to gain an understanding of how their task impacts the greater business process. Increasing the awareness and understanding that information workers are working within the context of a larger business process improves the efficiency and synchronization of these activities with the goals and priorities of the enterprise.

Ensure that the right people are involved in business processes at the right time. Fire drills and surprise deadlines are too common in today's work environment. By enabling flexible workflow, Office SharePoint Server 2007 can help ensure that the right people are involved in business process and that their activities are performed at the right point in time. Workers close to the business process need the flexibility to decide if and when another person needs to be involved in the process while the process is happening. Office SharePoint Server 2007 allows workers flexibility to modify workflows so that the right person can be involved at the right time. This can reduce last minute "fire drills" by automatically engaging the right workers at the right time to quickly complete business process activities.

Streamline content-centric business processes

The most pervasive informal business processes across an organization involve the movement of unstructured content from person to person. Common content-rich business processes include workflow around approval, coordination, collecting feedback, and issues tracking. These numerous processes are not typically supported by enterprise

solutions, and require IT involvement to build, manage, and deploy. By providing customizable out of the box workflows, Office SharePoint Server 2007 can streamline the content-centric business processes that are performed by everyday users.

Robust, built-in workflows for enabling common business processes. Robust built-in workflows for common tasks such as approval, coordination, signature, feedback, and issues tracking allow organizations to help people start streamlining task execution. Information workers have the ability to use and deploy the following built in workflows:

- **Approval:** Routes a document for approval. Approvers can approve or reject the document, reassign the approval task, or reject changes to the document.
- **Collect feedback:** Routes a document for review. Reviewers can provide feedback, which is compiled and sent to the document owner when the workflow is completed.
- **Collect signatures:** Gathers signatures needed to complete a 2007 Office document (started from within an Office client application).
- **Disposition approval:** Manages document expiration and retention by allowing participants to decide whether to retain or delete expired documents.
- **Three-state:** Manages business processes that require organizations to track a high volume of issues or items.
- **Translation Management:** Manages the manual document translation process by creating copies of the document to be translated and assigning translation tasks to translators.

Customize and configure workflows for targeted business process. In addition to the out-of-the-box workflows, custom workflows can be created for special targeted processes to meet the needs of the business. An organization may choose to design and develop workflows that are unique to the business processes for specific groups and departments. Developers can create workflows that are initiated by people, or they can create workflows that start automatically based on an event, such as when a list item is created or changed.

There are two ways in which custom workflows can be created for Office SharePoint Server 2007:

- **Office SharePoint Designer 2007** is for power users to create no-code workflows for use in a specific list or library. These workflows are created from a list of available workflow activities, and the power user who creates the workflow can deploy the workflows directly to the list or library where they will be used.
- **Microsoft® Visual Studio® 2005 Extensions for Windows Workflow Foundation** is for professional software developers. It enables them to use the Office SharePoint Server 2007 workflow extensions to create new workflows. But it also enables them to add new workflow activities by extending the Windows Workflow Foundation platform. They can also build new workflow activities which then in turn can be reused by power users using SharePoint Designer. Third parties and ISVs can use this platform to build complete end-to-end business process management solutions. After a professional developer creates custom workflows, a server administrator deploys them across multiple sites.

Additional Information about Enable People Ready Processes through Workflow

[TechNet Presentation:
Designing, Deploying, and
Managing Workflow in
SharePoint Sites](#)

[ISDN: Workflows in Office
SharePoint Server 2007](#)

[TechNet Presentation:
Designing, Deploying, and
Managing Workflow in
SharePoint Sites](#)

[ISDN: Workflow
Information Center](#)

[ISDN: Workflows in Office
SharePoint Server 2007](#)

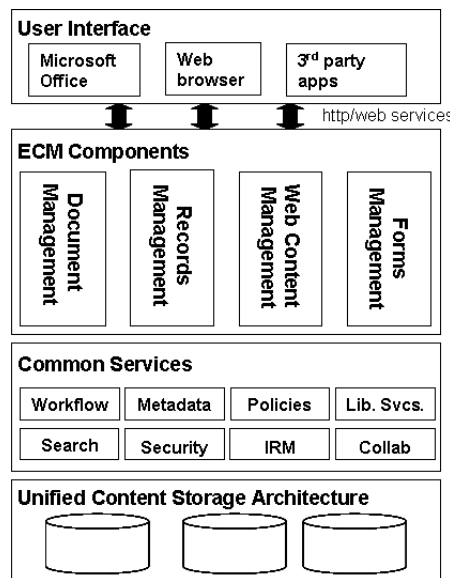
INCREASE IT MANAGEABILITY AND EFFICIENCY

Most organizations struggle to provide their business users with meaningful workflow solutions in an efficient way. In some cases, IT resources must maintain separate point solutions for automating process execution. In other cases, their workflow tools require extensive development and customization to enable the rich features the business needs. The workflow solution included within Office SharePoint Server 2007 is designed to help IT organizations efficiently deploy and maintain people-driven process solutions while delegating administrative management activities to the business.

Because workflows are an integrated part of the Office SharePoint Server 2007 platform, these solutions can leverage a single storage architecture, common services, accessed by using familiar interfaces. This unified platform provides numerous efficiencies and enhanced functionality for developing, deploying, and managing workflow solutions within the Office SharePoint Server 2007 framework.

Components of the unified architecture include:

- **User Interface:** All Enterprise Content Management (ECM) functionality, including workflow, is made accessible through familiar tools such as Web browsers, Office applications, and third-party applications.
- **Common Services:** The unified Office SharePoint Server 2007 platform enables IT to reuse and deploy a rich set of functionality across various components.
- **Unified Content Storage Architecture:** The unified storage architecture provides IT resources with a consistent way of deploying and managing content repositories irrespective of the solution or type of content.



By leveraging a unified architecture, common services, and consistent user interfaces, IT organizations can dramatically increase both the efficiency and effectiveness of workflow solutions.

Reduce reliance on IT to create workflows

Empowering users to create and manage their own workflow reduces reliance on IT and increases the speed at which the business can start automating activities and working

Additional Information about Increasing IT Manageability & Efficiency

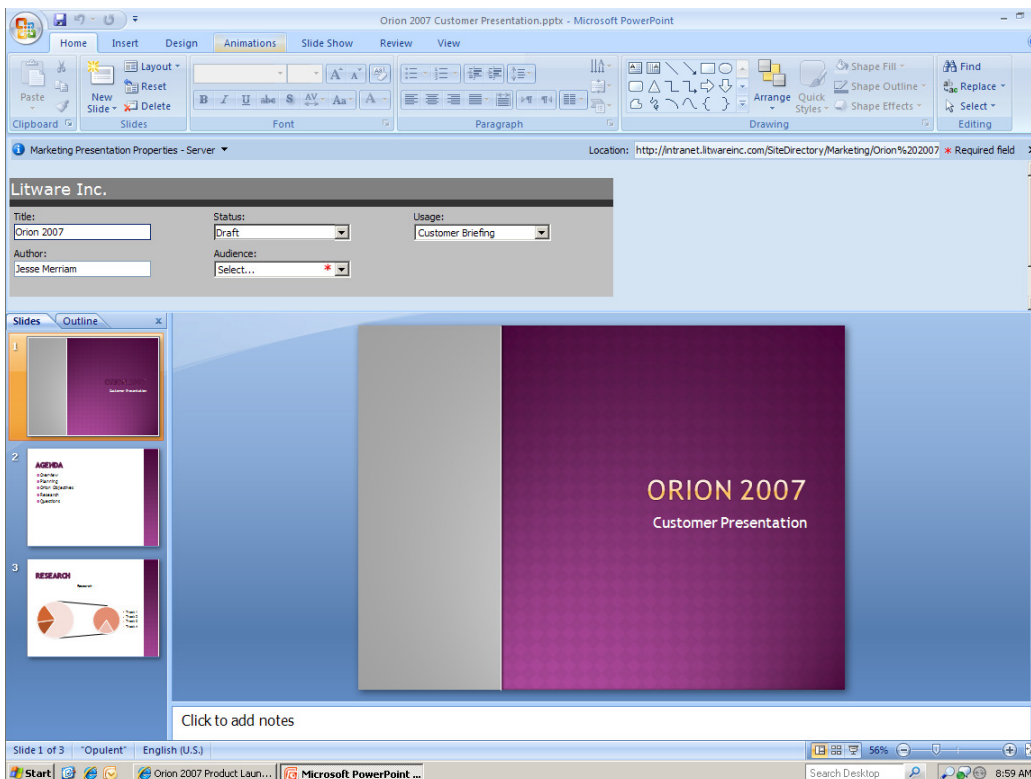
[MSDN: Document Information Panel and Document Properties](#)

[MSDN Blog: MOSS Architecture and Shared Services](#)

[TechNet: Plan Shared Services Providers](#)

more efficiently. Delegated administration features lessen the burden on IT for designing, managing, and executing workflows.

Collect process information using the Document Information Panel. The Document Information Panel helps ensure that documents are tagged with the appropriate metadata to make them easy to find, discover, and manage over their entire lifecycle. In the 2007 Office, the new Document Information Panel feature, which is based on InfoPath, is used to capture meta- and process data on Microsoft® Office Word 2007, Microsoft® Office Excel® 2007, and Microsoft® Office PowerPoint® 2007 documents from the moment of creation. The following screenshot shows the Document Information Panel.



Create custom forms using InfoPath. InfoPath forms make it easy to collect and validate information that drives your business processes. InfoPath 2007 uses built-in controls to deliver easy-to-use forms with predictable behavior, mouse over tips, and built-in data validation. InfoPath forms are simple to create using InfoPath 2007 to define them. Data capture can be as simple as placing a field on a form and linking it to a SharePoint list. Data validation is accomplished by tying those fields to drop-down lists. The following screenshot shows a form created using InfoPath 2007.



Efficient administration

The administration of business applications and technology platforms has become a significant drain on IT resources over the last decade. Past technology trends have led to a proliferation of point solutions that require IT administrators to learn and support multiple technologies. Office SharePoint Server 2007 is designed to lessen the burden on these resources by providing a unified platform with consistent tools for managing administrative tasks.

Consistent UI for all ECM and Office SharePoint Server 2007 administrative tasks.

Office SharePoint Server 2007 provides a familiar interface for conducting administrative tasks. The same UI is used to administer all of Office SharePoint Server 2007 capabilities, including collaboration, all enterprise content management capabilities, and search.

Delegate management tasks without granting central administrator access. Not every administrative task needs to be performed by central IT. With Office SharePoint Server 2007, many tasks can be completed by departmental IT staff without granting them permission to conduct central administration tasks. For example, a business unit IT person can create a search content source for their department and manage department information, such as records management workflows.

Manage single set of shared services for multiple farms. Server administrators can package custom modifications to Office SharePoint Server 2007, such as applications or

features, and consistently deploy them as a solution to a farm or single site. The administrator UI displays where solutions have been deployed. A solution can be rolled out to a farm, rather than having to be installed on every server individually.

Efficient deployment

Developing and deploying workflow solutions can be time consuming, putting strain on IT resources and creating long delays for meeting business demands. Office SharePoint Server 2007 provides a number of features that can streamline the development and deployment of out-of-the-box and custom applications, providing significant benefits for both users and IT resources.

Out of the Box functionality streamlines deployment. Office SharePoint Server 2007 provides workflows such as signatures, feedback, and approvals that can be used to automate many common processes being worked today. Providing these out-of-the-box workflows allows the business to quickly support their evolving needs. Information workers can design no-code workflows in SharePoint Designer 2007 and are able to deploy them immediately by leveraging the rich feature set of the out-of-the-box workflows. This reduces reliance on IT to build and deploy these solutions and quickly delivers value to the business.

Solution Deployment provides consistent application and feature deployment tool. Solution deployment is a multipart framework for letting administrators deploy custom solutions in a straightforward, safe, and consistent manner. Specifically, deployment refers to the process of distributing, unpacking, and installing solution (.wsp) files to front-end Web servers.

The following are the main components of solution deployment:

- **The solution store:** A centralized collection of all Office SharePoint Server 2007 solutions for the server farm. The first step in deploying a solution is to add the solution to the store.
- **Deployment:** Distribution, unpacking, and installation of the solution to the front-end Web servers. After adding a solution—whether it is a new solution or an upgrade for an existing solution—to the server farm solution store, it must be deployed uniformly to the front-end Web servers.
- **Synchronization:** Process of taking a new front-end Web server, or a damaged or inconsistently performing front-end Web server, and synchronizing its state to that of the other front-end Web servers.

Built on the familiar ASP.NET framework. Because Office SharePoint Server 2007 is built on ASP.NET, .NET developers have a decreased learning curve and servers as a common platform for custom development. Many previous applications written in

ASP.NET can be migrated to Office SharePoint Server 2007, which further streamlines deployment.

SIMPLIFY HUMAN INTERACTION THROUGH USABILITY

Organizations need simple data collection and interactive tools that make participation in business process straightforward. Simplicity of the user experience is essential to adoption, and adoption is necessary for creating an agile enterprise.

Simplify data collection

Providing simple yet robust interfaces for collecting data in support of business processes can be one of the biggest challenges with building workflow solutions. Many HTML-based forms options lack the functionality to ensure data integrity and can be unappealing to the eye. More complete forms solutions with high usability and functionality cannot be deployed to a wide audience, thus limiting their effectiveness. In both cases, many forms solutions are disconnected from the underlying workflow technology and require coding to create an integrated solution. Office SharePoint Server 2007 provides a unified workflow and forms solution that provides exceptional usability combined with rich functionality for simplifying the data collection process.

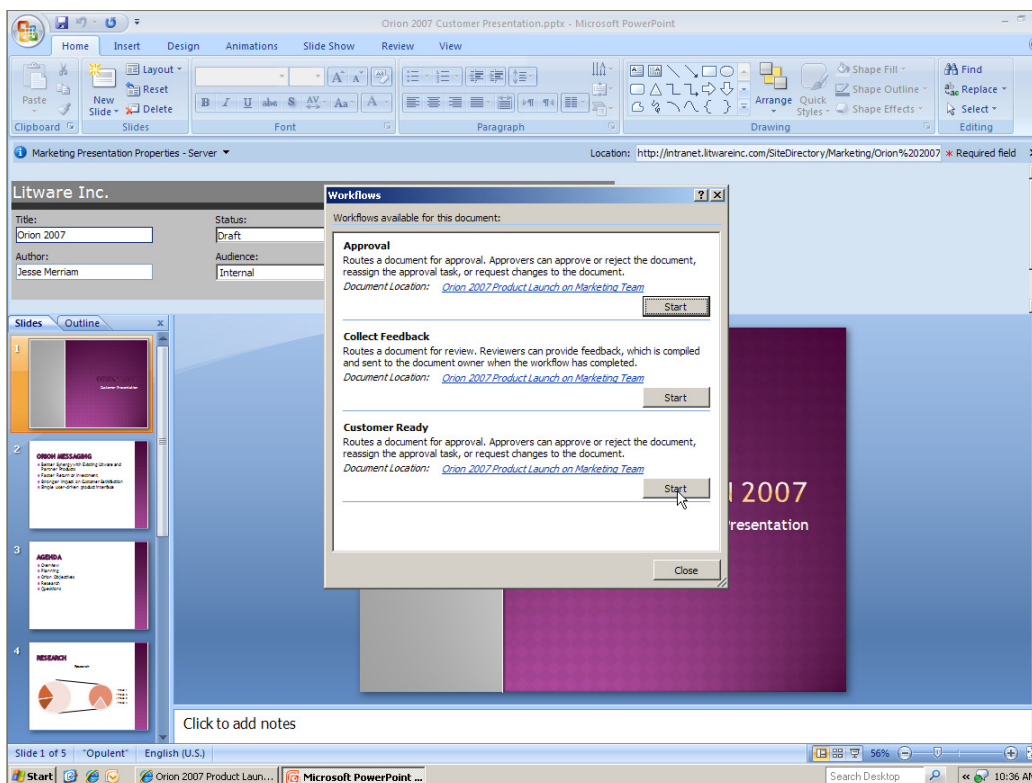
Fill out forms in a common browser. InfoPath Forms Services, which is part of Office SharePoint Server 2007, helps organizations extend their reach to all employees by providing multiple ubiquitous options for filling out forms without client side install of software. Users can fill out forms in a common Web browser or by using a HTML-enabled mobile device.

Collect important metadata elements using the Document Information Panel. With Office SharePoint Server 2007, you can collect and validate important document metadata using the Document Information Panel, which appears in 2007 Office system documents. The metadata may include information such as workflow status, content deadline, routing information or other properties related to the documents lifecycle. Custom document information panels can be created that contain external data connections, data validation, conditional formatting, business logic, and other controls. Document templates can be deployed with advanced capability built directly into a document in a way that is easy and straightforward for document authors.

Simplify workflow participation

To achieve a "workflow for the masses" vision, it is required to simplify how users participate in workflow processes. By integrating the process into familiar tools, such as the 2007 Office system, and removing friction through workflow automation, it is possible to align more closely with how people work and thus increase participation

Participate in workflows from within 2007 Office system applications. Users can initiate workflow from directly within 2007 Office system applications as documents are being created. After a workflow is added to a list, library, or content type and thereby made available for use, you can start this workflow on a document or item or set it to automatically start when an item is created. To start a workflow, you select the workflow that you want from the list of workflows available for the document or item. Depending on how the workflow was designed and configured, you might have the option to further customize the workflow when you start it on a document or item by customizing such options as participants, due date, and task instructions. The following screenshot shows how to participate in a workflow from within 2007 Office system applications.



View a personalized to-do list with tasks from all in progress workflows. Users can access personalized to-do lists within their 2007 Office system applications. These personalized to-do lists enable users to view the tasks assigned to them by any business processes requiring their participation. This SharePoint task list can also be synchronized to Outlook for optimal usability.

Automate workflow initiation to ease user burden and increase corporate compliance. Workflows can automatically be initiated by actions such as creating a new document or changing a document, or by performing a specific, predefined action within Office SharePoint Server 2007. This allows more employees to participate in workflow in a simplified, passive manner. Automatic initiation of workflows also can increase

compliance to corporate related procedures. This allows organizations to put in place workflows that can ensure broad compliance with key standards and processes. In many cases users can comply with these standards without explicitly knowing they are executing a step in a process.

Simplify process management and workflow

Business users need simple tools and templates that can provide them basic functionality to be in control of the management of their processes. By empowering users with simple and easy tools and interfaces, the business can take ownership of the overall effectiveness and efficiency of their process execution.

Track workflow status to see outstanding tasks. Office SharePoint Server 2007 allows users to spend less time hunting down users to find out the status of a workflow they are involved in and more time actually working on the process. Visibility into the status of a workflow can be accomplished by the user in a couple ways. Within a 2007 Office system application, the Document Information Panel contains a view of the status of the related workflow. Users can also view the status of any specific workflow or a group of workflows directly within Office SharePoint Server 2007 through a SharePoint list. The following screenshot shows workflow status.

The screenshot displays the 'Workflow Status: Employee Onboarding' page. The browser window title is 'Workflow Status - Windows Internet Explorer'. The address bar shows a URL from 'http://moss.litwareinc.com/hrf/_layouts/WrkStat.aspx?List=%7b21997D54%2d8246%2d...'. The page header includes 'Litware Inc.' and 'Welcome Tracy Tallman - Admin'. The main content area is titled 'Workflow Status: Employee Onboarding' and contains two sections: 'Workflow Information' and 'Tasks'.

Workflow Information

Initiator: Tracy Tallman - Admin	Document: New Employee - Doris Hartwig
Started: 3/26/2007 3:33 PM	Status: In Progress
Last run: 3/26/2007 3:33 PM	

Tasks

The following tasks have been assigned to the participants in this workflow. Click a task to edit it. You can also view these tasks in the list Tasks.

Assigned To	Title	Due Date	Status	Outcome
Willis Johnson - HR Rep	Welcome Packet - Give new employee welcome materials to Doris Hartwig NEW		Not Started	
Don Funk - IT Staff	E-mail - Configure email account for Doris Hartwig NEW		Not Started	
Don Funk - IT Staff	Keys & Passcode - Hand keys and give passcode for Doris Hartwig to Pat Coleman - Manager NEW		Not Started	
Don Funk - IT	PC - Assign PC to Doris Hartwig NEW		Not	

Easily access reports on workflow activities. Office SharePoint Server 2007 provides pre-defined reports that allow users to evaluate number of workflow instances operating

at a current time, processing time of key events, and the success and failures rates in the workflows. Reports can easily be accessed by going to the user's SharePoint list, which is specific to the workflows the user is involved in. Users can leverage predefined workflow reports or build their own reports by selecting specific workflow events to populate the report data.

Modify workflows when in progress. Workflows can be modified by users while in-flight. Enabling workflow modification when needed allows the processes to accommodate changing business needs. This can be very useful in situations where the users may be on vacation and alternative approvers are necessary or when new individuals become involved in the process after it has been initiated. In addition, users can create sub-workflows that split off from the original process in order to quickly enable increased agility.

Cancel workflows in progress. If an error occurs with a workflow, or a workflow stops responding when users submit task information, the workflow can be canceled. When you cancel a workflow, the workflow's status is set to Canceled, and all of the tasks created by the workflow are deleted.

INTEGRATE AND EXTEND WORKFLOW SOLUTIONS

Office SharePoint Server 2007 utilizes Windows Workflow Foundation which can be extended to fit custom business process requirements. Additionally, Office SharePoint Server 2007 can be combined with Microsoft® BizTalk® Server and other third-party tools to leverage other capabilities and applications.

Enhance and extend workflow

The Office SharePoint Server 2007 solution allows customers to customize workflow to fit any business need. Office SharePoint Server 2007 can integrate line-of-business application data into workflows, work with specialized business process management tools, and utilize other Office SharePoint Server 2007 capabilities, such as Business Intelligence. This allows companies to integrate their platform to create a holistic business solution.

Integrate external business data into InfoPath forms. InfoPath forms can leverage web services to import critical business data from third-party databases and applications. This feature helps protect the integrity of source data from specialized business programs or line-of-business applications, such as SAP or Siebel, and facilitates data quality during process execution.

Customize the Document Information Panel to include data validation and other business logic. The Document Information Panel in the 2007 Office system can be customized to include data related to your business process without the need for an

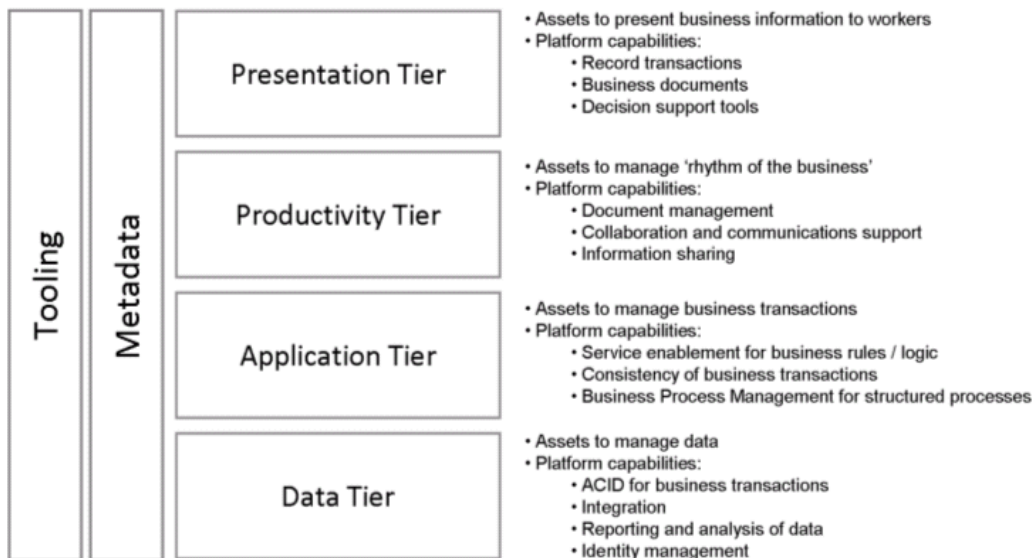
**Additional Information
about Integrating and
Extending Workflow
Solutions**

[ISDN: What Are Composite
Applications?](#)

[Interoperability TechCenter](#)

additional interface or application. By leveraging the rich functionality of InfoPath, the Document Information Panel can be used to collect metadata for Office SharePoint Server 2007 content, such as deadlines, approvers, and required signatures. This enables the Document Information Panel to leverage the same data validation features and connectivity as any custom form. The Document Information Panel can also be used to define key business logic, such as routing information, labeling, and policy enforcement.

Integrate forms and business process management capabilities into composite applications. A composite application is a collection of software assets that have been assembled to provide a business capability. These assets are artifacts that can be deployed independently, enable composition, and leverage specific platform capabilities, that is, workflow.



Composite applications are designed to provide users with access to many sources of information and transactional capabilities needed to complete their daily tasks. With Office SharePoint Server 2007, users can participate in a workflow that automatically populates key business data associated with a step in the business process within the composite application. For example, in a purchase order workflow, a company's name and address can be pulled from Business Data Catalog, which ensures the information is accurate. This streamlines the development of composite applications that leverage workflow capabilities and ensures that the process is executed with the right information.

Leverage other Microsoft capabilities

In many cases, organizations want to extend their workflow capabilities to include the more robust business process management capabilities, both in terms of application integration, transactional processing, and activity monitoring. By leveraging the robust

capabilities provided by other Microsoft technologies, companies can expand the depth of their workflow solutions.

Integrate with BizTalk for business process management solutions requiring more transactional processing. For organizations that need more complex Business Process Management Solutions with extensive transactional capabilities may choose to integrate Office SharePoint Server 2007 workflow with BizTalk Server. This includes powerful, familiar tools to design, develop, deploy, and manage those processes. BizTalk works with Office SharePoint Server 2007 by using the BizTalk SharePoint adapter, which enables BizTalk to access, monitor and use SharePoint libraries and lists.

Office SharePoint Server 2007 can be combined with BizTalk when functionality requires more system to system functionality, such as receiving electronic claims from outside parties. BizTalk can handle the system to system functionality while Office SharePoint Server 2007 provides the human workflow component such as the knowledge involved in processing the claims.

Leverage Office SharePoint Server 2007 business intelligence capabilities for workflow analysis and reporting. Many organizations require business intelligence capabilities for conducting analysis on their business processes. These companies can leverage the rich business intelligence capabilities delivered within Office SharePoint Server 2007 to provide the framework for this analysis. Office SharePoint Server 2007 provides reporting databases and the mechanism to push business data from Office SharePoint Server 2007 or any compatible custom application. Business data can then be viewed and reported by using Reporting Services, Analysis Services, and Excel add-ins.

Enable interoperability with third-party tools

Companies have multiple platforms in place for managing their business. Therefore, it is essential for many organizations that their workflow solutions are fully integrated into line-of-business applications and specialized tools. By enabling data exchange and integrated interfaces, companies can maximize their technology investments.

Integrate with specialized business process management tools. Some organizations may require the integration with specialized business process management tools. Office SharePoint Server 2007 provides the interoperability and open standards (such as ASP.NET) required for integration with these third-party tools.

Integrate with line-of-business and custom transactional applications to extend business process management capabilities. Office SharePoint Server 2007 provides numerous flexible options for integrating with transactional and line-of-business applications. You can integrate information from business applications such as SAP, Siebel, and Microsoft SQL Server into the collaborative environment in Office SharePoint Server 2007 by adding the business data column type to a list. This enables the execution

of integrated workflows based on a list of items that use a combination of columns from a SharePoint site and from an external business application.

Conclusion

The Office SharePoint Server 2007 workflow solution provides organizations with a framework for connecting people, process, and information in support of key business processes. By providing a group of pre-defined customizable workflows that can be deployed quickly and simply with minimal reliance on IT and by integrating business process participation into everyday tools, organizations can bridge the process gap to include informal, collaborative processes thus enabling broad user adoption across the enterprise and improving the effectiveness of the way people work.