

Introduction to Business Process

Microsoft Office SharePoint Server 2007 provides many features that can help you integrate and streamline your business processes:

- Browser-based forms created by using InfoPath Forms Services and Microsoft Office InfoPath 2007
- Workflows
- Greater integration with the 2007 Microsoft Office system desktop programs

This article briefly describes these features.

Gather data by deploying browser-based forms

You can use InfoPath Forms Services server technology in Office SharePoint Server 2007 to create browser-based forms and gather data from organizations that do not use Office InfoPath 2007. People in those organizations can complete forms in a Web browser or HTML-enabled mobile device.

With Office SharePoint Server 2007, you can deliver consistent forms regardless of where they are used. Office InfoPath 2007 uses built-in controls to deliver easy-to-use forms with predictable behavior, ScreenTips, and data validation.

For example, the Adventure Works Marketing team replaced paper expense reports with a browser-based form:

EXPENSE REPORT

Type information about your work-related expenses in the fields below.

Report Date: 9/26/2007 Expense Code: 0000244 Start Date: 9/13/2007

Business Purpose: Attend branding seminar in Seattle

Employee Information

Name: Prashanth Desai Title: Marketing

Department: Marketing ID Number: 00-PD123

E-mail Address: prashanth@adventure-works01.com

Manager Information

Name: Connie Vrettos E-mail Address: Connie@adventure-works01.com

Itemized Expenses

Date	Description	Category
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When an employee submits the online form, a custom workflow routes the form to a manager for approval and then to accounting. This automated process reduces errors and paper consumption, and speeds the approval process.

Streamline business processes by using workflows

In Office SharePoint Server 2007, a workflow is a process that automatically moves documents or items through a sequence of actions or tasks that are related to a business process. Workflows attach business logic, that is, instructions that specify and control the actions that happen to a document or item, to the files or items in a SharePoint library or list. Workflows can streamline the cost of coordinating common business processes, such as project approval or document review, by managing and tracking the human tasks involved with those processes.

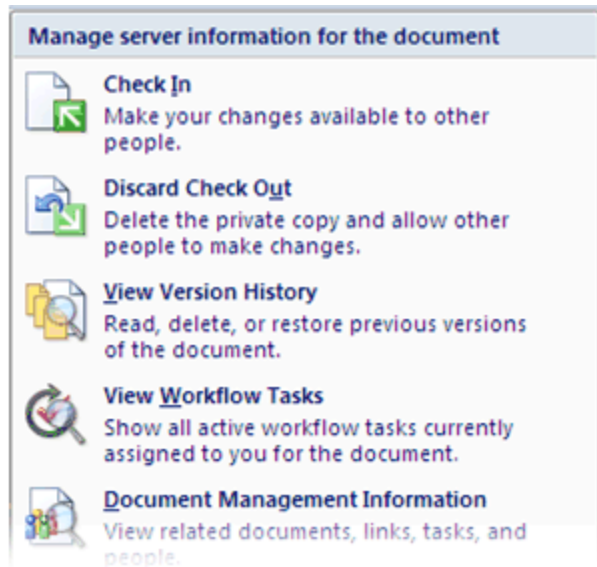
The Technical Documentation team at Adventure Works uses workflows in several ways. For example, several of the technical manuals in the Document Center use an Approval workflow, a predefined workflow that routes a document to reviewers and approvers. When a document author starts the Approval workflow, it creates the approval tasks, assigns those tasks to the workflow participants, and sends them an e-mail message with task instructions and a link to the document to be approved. While the workflow is in progress, the workflow owner and participants can check the status of the workflow to see which participants have completed their tasks. When the participants complete their tasks, the workflow ends and the owner is automatically notified that the workflow is complete.

Office SharePoint Server 2007 provides a set of predefined workflows. You can also use the Workflow Designer in Microsoft Office SharePoint Designer 2007 to create workflows that are customized for the unique needs of your organization.

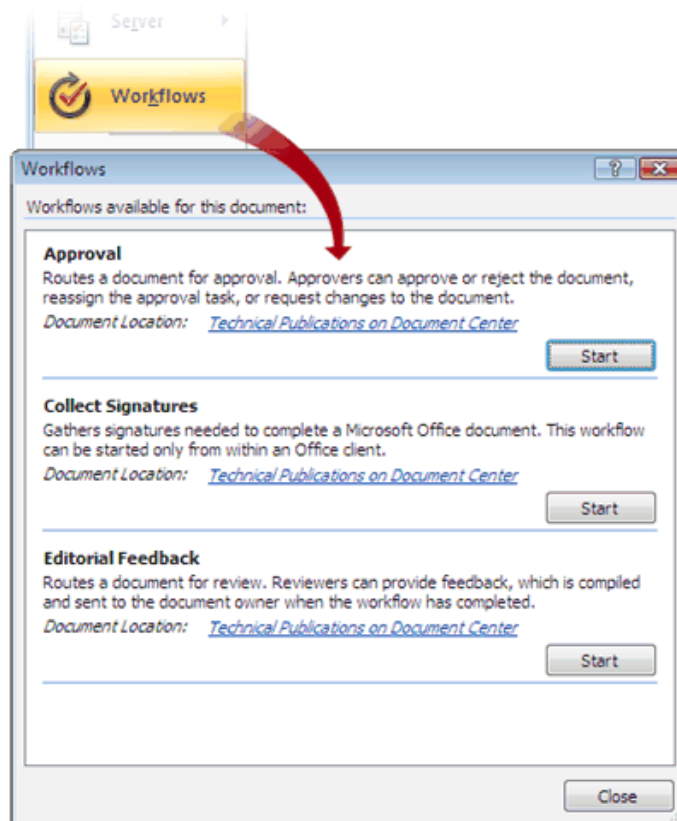
Use workflows directly from 2007 Office release programs

You can start and interact with workflows directly in some of your 2007 Office release programs, and you can gather document metadata with the Document Information Panel. For example, on the Adventure Works site, you can complete a workflow task and add metadata directly in Microsoft Office Word 2007. You don't have to exit a program to complete a workflow task.

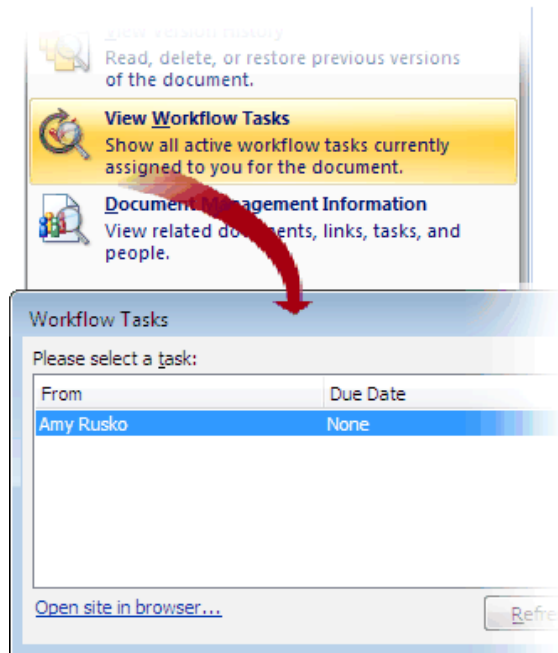
The menus and commands in the following figures appear in Microsoft Office Excel 2007, PowerPoint 2007, and Word 2007. To see these menus and commands, you must be working on a file that resides in a library on an Office SharePoint Server 2007 site.



For example, at Adventure Works, Amy Rusko, the Technical Documentation Manager, starts workflows from Excel 2007, PowerPoint 2007, and Word 2007. Her new workflows apply to the open document.

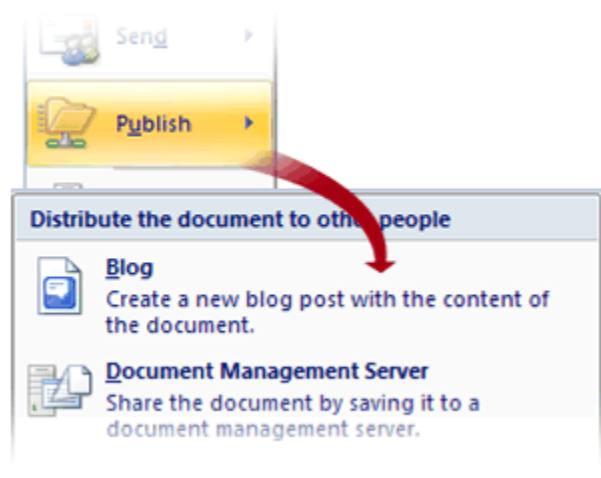


The workflow notifies Martin, one of Amy's employees, about his new workflow task by sending him an e-mail message. In Microsoft Office Outlook 2007, Martin clicks the link to open the document, and from Word 2007, he can view and complete his workflow tasks, as shown in the following figure.

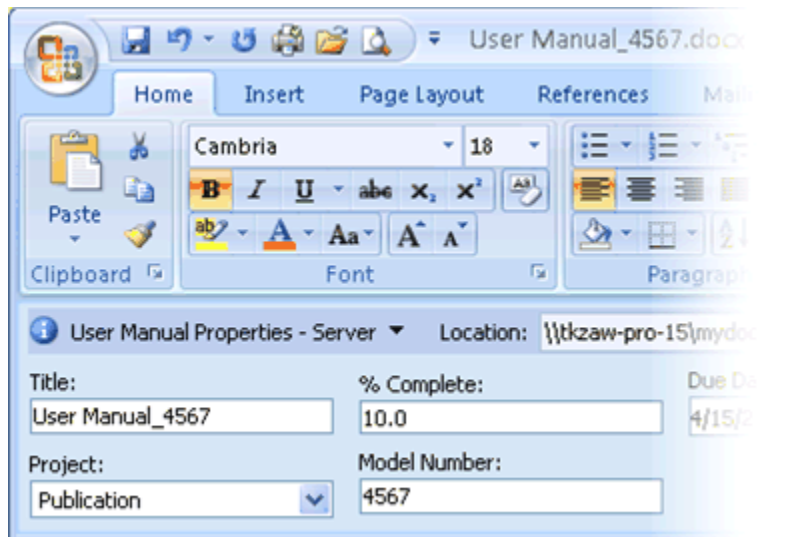


Use other server features directly from 2007 Office release programs

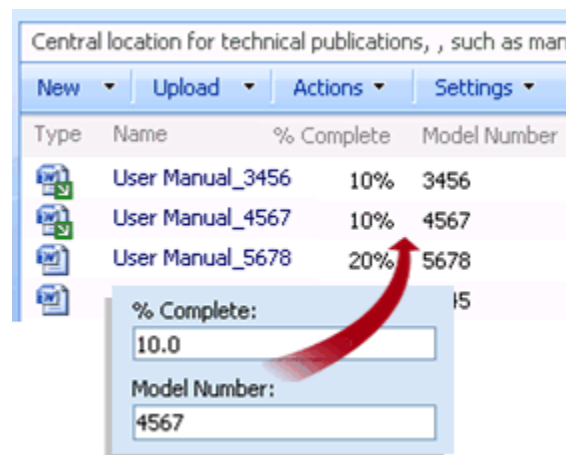
In addition to workflows, you can also use 2007 Office release programs to use other server features, such as publishing a file to a blog or a document management server. With PowerPoint 2007, you can package a slide deck for a CD and create handouts for Word 2007. To use these features, you must be working on a file that resides in a library on an Office SharePoint Server 2007 site.



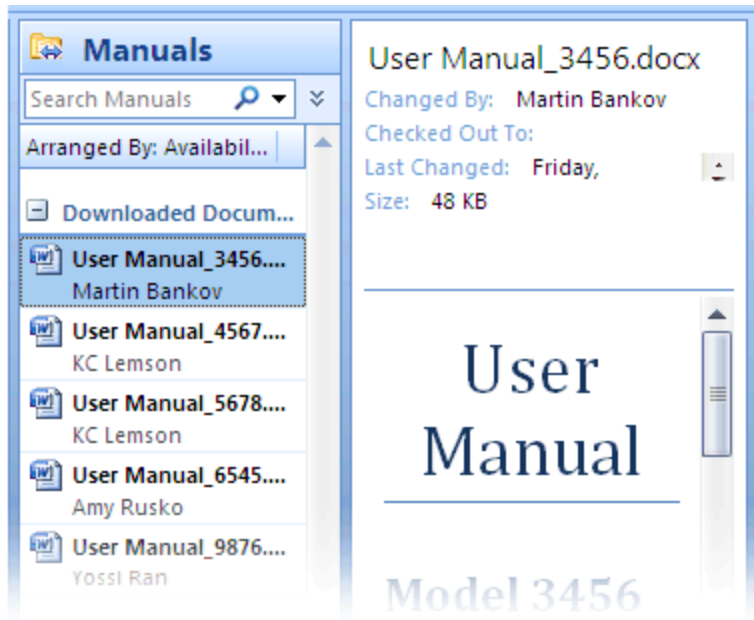
You can also use the Document Information Panel to set or change a file's metadata. The following figure shows a Document Information Panel for one of the Adventure Works user manuals.



If you enter information in a field and save the file, Office SharePoint Server 2007 writes your changes to the fields in the document library, as shown in the following figure.



Outlook 2007 also integrates with Office SharePoint Server 2007. For example, a workflow can alert users when they have a task assigned to them. You can connect Outlook 2007 to a document library and perform many actions that you can't from Office SharePoint Server 2007. For example, you can use Windows Desktop Search to find content in your files. You can also turn on the Reading Pane in Outlook 2007, and browse through any of the files in the library, provided that you have an application installed to support each file type. The following figure shows some of the Adventure Works user manuals in the Outlook 2007 Reading Pane.



These are just a few of the ways that Office SharePoint Server 2007 can integrate with Microsoft Office.