Workflow and Office SharePoint Server 2007

The 2007 Office system includes new versions of the Office desktop applications, including Word, Excel, Outlook, and PowerPoint. It also includes a separately licensed suite of servers that address various areas. The member of this suite that’s most relevant to workflow is Office SharePoint Server 2007.

Office SharePoint Server supersedes earlier Microsoft products, including SharePoint Portal Server and Content Management Server, to provide a range of enterprise content management functions. These include several useful additions to the workflow capabilities built into Windows SharePoint Services. As in Windows SharePoint Services, all of these rely on Windows Workflow Foundation.

**Combining Windows Workflow Foundation, Windows SharePoint Services, and Office SharePoint Server**

The workflow-related additions that Office SharePoint Server provides to Windows SharePoint Services can be grouped into three areas: support for Office 2007 clients, the ability for workflows to use forms created with InfoPath, and pre-defined workflows. This section looks at each of these three areas.

Workflows created using Windows SharePoint Services alone must use ASPX forms. Accordingly, the only way for people to interact with these workflows is via a Web browser. Yet the Office desktop applications are widely used, and many Windows SharePoint Services workflows will reference documents created with these applications. Why not allow users to interact with these workflows directly from Word, Excel, Outlook, and other Office applications?

Office SharePoint Server provides this ability. Rather than relying on a browser to communicate with users, a Windows SharePoint Services workflow running with Office SharePoint Server installed can display its forms directly in Office 2007 applications. For many workflows, this will allow a more natural interaction with users. A Windows SharePoint Services task list, for example, can be synchronized with the task list maintained by Outlook 2007, giving the user a single To Do list. Tasks can also be represented in Word 2007 documents, Outlook 2007 emails, and other ways, letting users input information to a running workflow directly from Office applications.

Displaying forms directly in Office applications requires some way to define those forms. The ASPX pages used by standard Windows SharePoint Services workflows will no longer suffice. To address this, Office SharePoint Server allows workflow authors to define forms using InfoPath 2007. For most people, these forms are easier to create than ASPX pages, and they can also provide capabilities such as built-in validation. It’s important to note, however, that the InfoPath-based forms used with a workflow, referred to in this paper as InfoPath workflow forms, provide only a subset of the capabilities offered by standard InfoPath forms. Much of the InfoPath object model isn’t available, for instance, as the focus is entirely on creating and using forms as part of workflows.

Letting workflow authors interact directly with Office applications through InfoPath workflow forms is certainly useful. Yet so far, everything described in this paper targets developers—there’s nothing that’s immediately usable by information workers. Office SharePoint Server changes this by including a group of pre-defined workflows. All of these workflows are meant to be used directly by information workers, and all can be customized to meet various requirements. The pre-defined workflows that Office SharePoint Server provides include the following:

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| • | Approval: routes a document for approval. The workflow initiator specifies a list of approvers, each of whom can approve or reject the document, reassign the approval task, or request changes to the document. The example workflow scenario described earlier for Windows SharePoint Services was actually this pre-defined Approval workflow. (It’s worth noting that while the earlier scenario illustrated only aspects of Windows SharePoint Services, executing this pre-defined Approval workflow actually requires Office SharePoint Server. A developer could create a workflow that behaved exactly like the earlier scenario using only Windows SharePoint Services, however.) |
| • | Collect Feedback: routes a document for review, much like the Approval workflow. Participants can provide feedback, which is compiled and sent to the document owner when the workflow has completed. Unlike Approval, which by default assigns tasks to participants sequentially, this pre-defined workflow defaults to parallel task assignment, allowing feedback to be returned in any order. |
| • | Collect Signatures: routes an Office document for required signatures. This workflow can be started only from within an Office client. |
| • | Disposition Approval: helps manage document retention by allowing participants to decide whether to retain or delete expired documents. |
| • | Translation Management Workflow: helps manage the process of document translation. This workflow can be used to assign specific translation tasks to the participating translators, then track the progress of those tasks. It can also assign new translation tasks when a source document changes. |
| • | Group Approval: implements a group-oriented approval process. This workflow is available only in East Asian versions of Office SharePoint Server. |

All of these pre-defined workflows use InfoPath workflow forms, and so all allow access directly from Office 2007 applications.

Office SharePoint Server also provides other workflow-related services, including the ability to create reports on workflow history directly in Excel and support for bulk task completion, allowing a user to approve many outstanding tasks at once. The product provides a range of other functions as well, such as enhanced search, the ability to load, calculate, and render Excel spreadsheets on the server, and more. This large set of functionality is provided in two versions: a base edition and an enterprise edition. The product’s base edition includes the pre-defined workflows just described, but it doesn’t provide support for InfoPath workflow forms—users must interact with these workflows via a Web browser. The enterprise edition supports all of the capabilities described in this section, including using InfoPath workflow forms.