Workflow in Office SharePoint Server: A Scenario

As before, the best way to get a sense of how a workflow works in an Office SharePoint Server environment is to walk through a scenario. This section shows the same workflow used as an example in the Windows SharePoint Services section of this paper. As mentioned earlier, this is actually the pre-defined Approval workflow provided with Office SharePoint Server. In the Windows SharePoint Services example, the workflow interacted with its users via ASPX forms displayed in a Web browser. Because this scenario uses Office SharePoint Server as well, however, all interaction with the workflow now happens via InfoPath workflow forms displayed in Office 2007 applications.

Once again, the process begins the workflow’s installation and association with some document library or list, and once again, those details are omitted here. What’s most interesting begins with the workflow initiator creating a running workflow instance. As the screen below shows, this can now be done directly from a Word 2007 document. If Office SharePoint Server is deployed, a **Start Workflow** option appears when the Microsoft Office button is clicked.

Choosing this option brings up the **Start New Workflow** window, as shown below.

As in the earlier scenario, all workflow associations that are available for this document are shown. Clicking the **Start** link for the workflow named Approval causes that workflow to begin, bringing up the window shown below (which is actually an InfoPath workflow form). As illustrated in the earlier scenario, the pre-defined Approval workflow allows its initiator to customize its behavior by specifying a list of approvers, setting how long each one has to perform his task, and more. The fields in the form below—the workflow’s Initiation form—allow setting these things.

The people listed as approvers in this workflow will now each be sent an email message in the order their names were entered. Assuming those approvers are using Outlook 2007, that message might look like this:

The approver can examine the document by clicking on the document name link in the body of the mail. Clicking on the **Edit this task…** button at the top of the message (here marked with a red square) brings up the form shown below.

This is the workflow’s Task Completion form. Its contents are identical to those shown in the Windows SharePoint Services example earlier. This time, however, the form was defined as an InfoPath workflow form, and it’s displayed directly in Outlook 2007. As before, the approver can add comments, then approve or reject the document.

The operation of this workflow is identical to the Windows SharePoint Services example. Yet there are important differences. With Office SharePoint Server, the workflow initiator creates a workflow instance directly from Word rather than using a browser to access a Windows SharePoint Services site. Similarly, the workflow’s participants interact with this running instance entirely through Office 2007 applications. As with the initiator, there’s no longer any need to access the site itself. This ability to create and use workflows in a purely Office-based environment is likely to be important for a significant number of workflow applications.