

Microsoft Office SharePoint Server 2007: Business Processes & Forms

Business processes are at the center of any organization, and forms are often at the center of many business processes, such as the process of approving expense reports. Office SharePoint Server 2007 provides built-in workflow (workflow: The automated movement of documents or items through a specific sequence of actions or tasks related to a business process. Workflows can be used to consistently manage common business processes, such as document approval or review.) templates to help you automate your processes. You can also create custom workflows to streamline your collaborative processes. Electronic forms provided through InfoPath Forms Services can help you to collect and validate information that drives your business processes.

Streamline your processes with workflows

Workflows help people to collaborate on documents and manage project tasks by implementing specific business processes on documents and items on an Office SharePoint Server 2007 site. Office SharePoint Server 2007 includes several predefined workflows that are designed to address common business scenarios:

- **Approval** This workflow routes a document or item to a group of people for approval.
- **Collect Feedback** This workflow routes a document or item to a group of people for feedback.
- **Collect Signatures** This workflow routes a Microsoft Office document to a group of people to collect their digital signatures.
- **Disposition Approval** This workflow, which supports records management processes, manages document expiration and retention by allowing participants to decide whether to retain or delete expired documents.
- **Three-state** This workflow can be used to manage business processes that require organizations to track a high volume of issues or items, such as customer support issues, sales leads, or project tasks.
- **Group Approval** This workflow provides a hierarchical organizational chart from which you can select the approvers and allow the approvers to use a stamp control instead of a signature. This solution was designed specifically for East Asian markets.
- **Translation Management** This workflow manages the manual document translation process by creating copies of the document to be translated and assigning translation tasks to translators. This workflow is available only for Translation Management Libraries.

Collect and validate information by using browser-based forms When you design form templates with Office InfoPath 2007 and deploy them to an Office SharePoint Server 2007 site, you can enable a setting that allows users to fill out forms by using a Web browser. That is because Office SharePoint Server 2007 employs InfoPath Forms Services technology, which — in addition to enabling the deployment of browser-based forms — provides a central location to store and manage form templates for your organization.

When you publish a form template to an Office SharePoint Server 2007 site, you can distribute it not just on your corporate intranet, but also on external Web sites, such as extranet sites or corporate Web sites. This allows you to collect data from customers, partners, suppliers, and others who are vital to the success of your business or organization. For example, a large insurance company can use a single form template to collect and process insurance claims and then deploy that form template to their Internet and intranet sites.