

## Best of Microsoft Office SharePoint® Conference 2008

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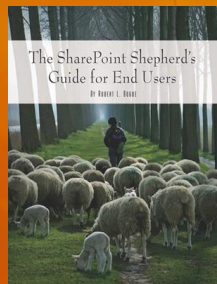
## SharePoint Workflow: Out of the Box, SPD, and Beyond

Robert Bogue  
Microsoft Office SharePoint Server MVP  
Rob.Bogue@ThorProjects.com

Microsoft Office  
Best of SharePoint® Conference 2008

## About Me?

- Author
  - 18 books including *The SharePoint Shepherd's Guide for End Users*
- Microsoft MVP MOSS
  - 6 years in the program
- Blogger  
<http://thorprojects.com/blog>



## What is a Workflow?

- Long Running
- Serializable
- Resumable



## Workflow Types

- Manual
- Out of Box
- SharePoint Designer
- Event Receivers
- Workflows with Visual Studio



## Manual

- Advantages
  - Low Cost/No Cost
  - No Development
- Disadvantages
  - Low/No Control



## Out of Box Workflows

- Advantages
  - Easy
  - No Development
- Disadvantages
  - Minimally customizable



## SharePoint Designer Workflows

- Advantages
  - Quick Custom Workflows
  - No coding required
- Disadvantages
  - Limited Activities
  - Limited Flow Control
  - Can not be reused



## Event Receivers

- Advantages
  - Simple Development
- Disadvantages
  - Not good for long running workflows



## Workflows with Visual Studio

- Advantages
  - Complete Control
- Disadvantages
  - Requires strong development skills
  - Requires more time to develop



## Almost Out of Box (Fabulous 40)

### Site Admin Templates

- Board of Directors
- Business Performance Reporting
- Case Management for Government Agencies
- Classroom Management
- Clinical Trial Initiation and Management
- Competitive Analysis Site
- Discussion Database
- Disputed Invoice Management
- Employee Activities Site
- Employee Self-Service Benefits
- Employee Training Scheduling and Materials
- Equity Research
- Integrated Marketing Campaign Tracking
- Manufacturing Process Management
- New Store Opening
- Product and Marketing Requirements Planning
- Request for Proposal
- Sports League
- Team Work Site
- Timecard Management

### Server Admin Templates

- Absence Request and Vacation Schedule Management
- Budgeting and Tracking Multiple Projects
- Bug Database
- Call Center
- Change Request Management
- Compliance Process Support Site
- Contacts Management
- Document Library and Review
- Event Planning
- Expense Reimbursement and Approval
- Help Desk
- Inventory Tracking
- IT Team Workspace
- Job Requisition and Interview Management
- Knowledge Base
- Lending Library
- Physical Asset Tracking and Management
- Project Tracking Workspace
- Room and Equipment Reservations
- Sales Lead Pipeline

## Out of the Box Workflows

- WSS (Web)
  - Tri-State
- MOSS (Web)
  - Approval
  - Collect Feedback
- MOSS (Non-Web)
  - Collect Signatures
  - Disposition Approval



## Three State

- Simple-Easy to use
- Demo
  - Conference Room Scheduling



## Approval

- Direct Approval or Rejection of a Document
  - Expense Reports
  - Meeting Minutes
- Single-Tier
- Serial or Parallel
- X of Y Approval
- Static or User Selectable Approver (or Approver Group)



## Collect Feedback

- Collect Feedback on a Document or Item
  - Training Plan
  - Proposed Rule Making



## SharePoint Designer Workflows

- Rules Engine
  - If-Then-Else
  - And
  - Serial/Parallel activities (Actions)
- Extensible with Visual Studio Developed Activities



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