



Designer or Custom Workflows

Do I Look Fat In This?

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Short Bios

- Kenneth Lo, PMP
- SharePoint Evangelist
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- SharePoint, Project Server
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Agenda

- What are Workflows
- Key Benefits of Workflows
- How Workflows Leveraged
- Major Players in BPM & MOSS Markets
- OTB, Designer, and Custom Workflows
- Live Case Study



What are Workflows

- Terminology
 - “The automation of a business process, in whole or part, during which documents, information or tasks are passed from one participant to another for action according to a set of procedural rules.”
 - Complex business rules and flow of control are declared graphically (e.g. Visio).

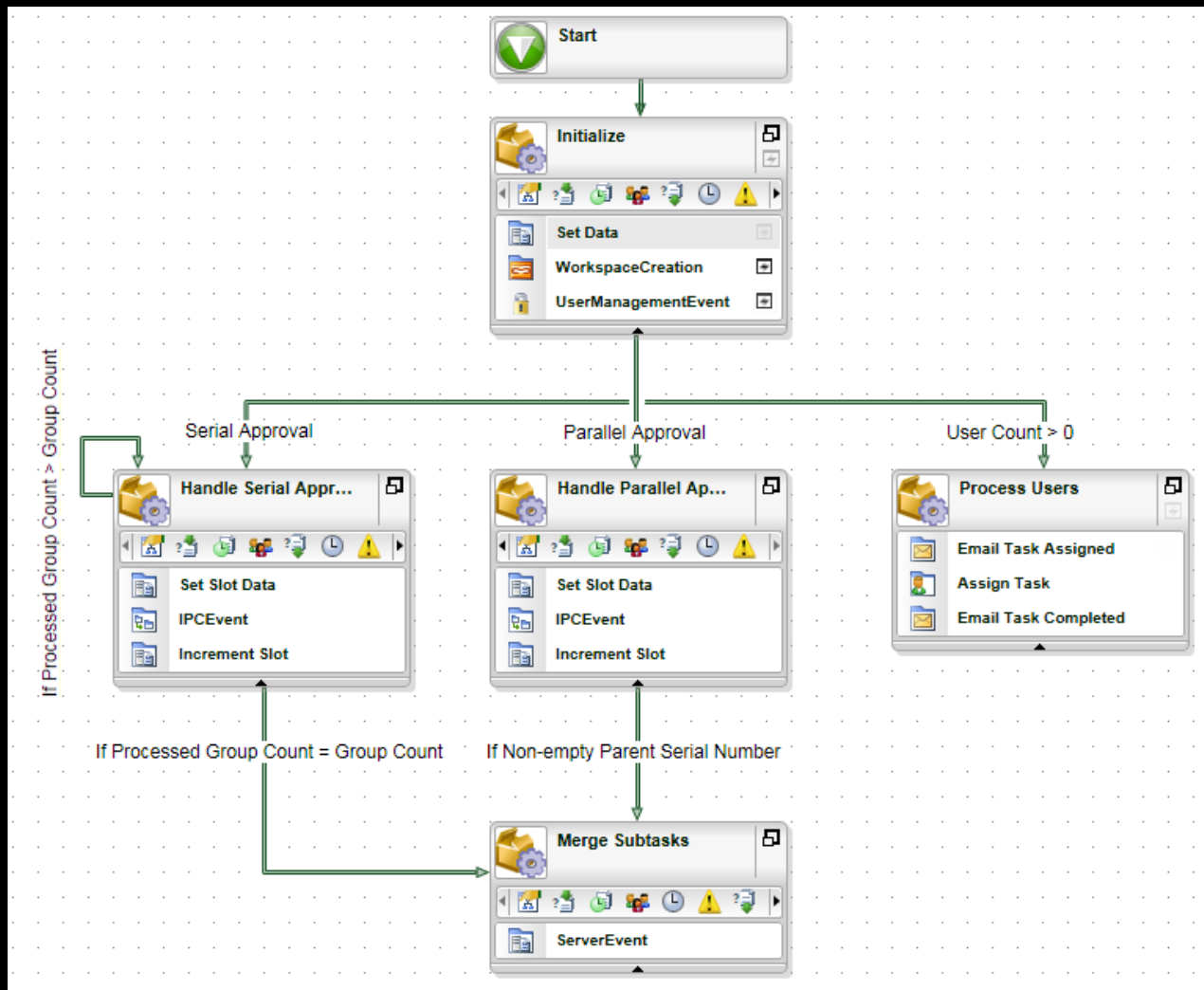


What are Workflows (cont)

- Sequential Workflow
 - Series of steps executed in a prescribed order
 - Each step and its sequence clearly defined
 - IF-ELSE decision making
 - Best for problems where predefined steps are known at design time



What are Workflows (cont)



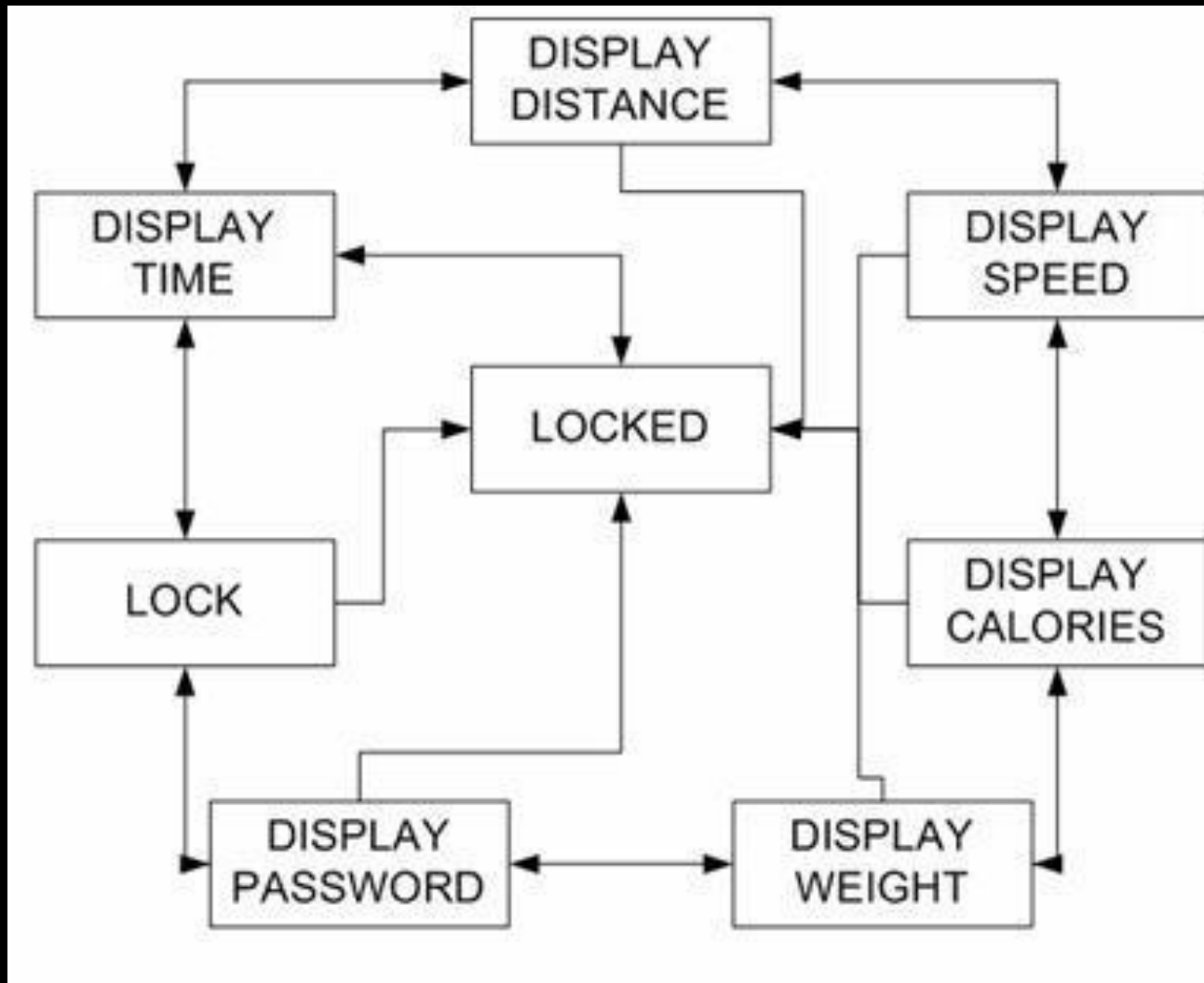


What are Workflows (cont)

- State Machine Workflow
 - No predefined sequence of steps
 - Define a set of states and possible transitions between each state
 - Control by external events
 - Best for problems involving human interactions



What are Workflows (cont)





Key Benefits of Workflows

- Automation – Streamline and simplify
- Process Control – Standardize process and audit trails
- Flexibility – Adapt to changing business rules
- Reusability – activity implementations and process models
- Scalability – application development and execution



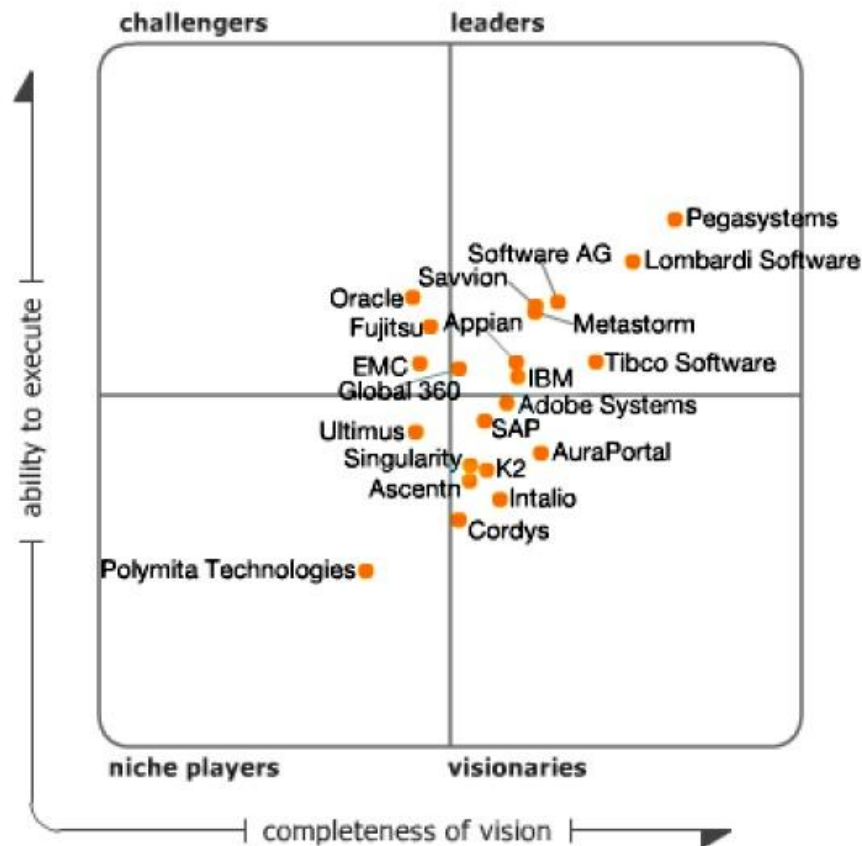
How Workflows are Leveraged

- Document Reviews & Approval
- Records Management
- Case Management
- Time & Expense Reporting
- HR On-Boarding
- Help Desk & Technical Support
- E-Commerce

Major Players in BPM Market



Figure 1. Magic Quadrant for Business Process Management Suites



As of January 2009

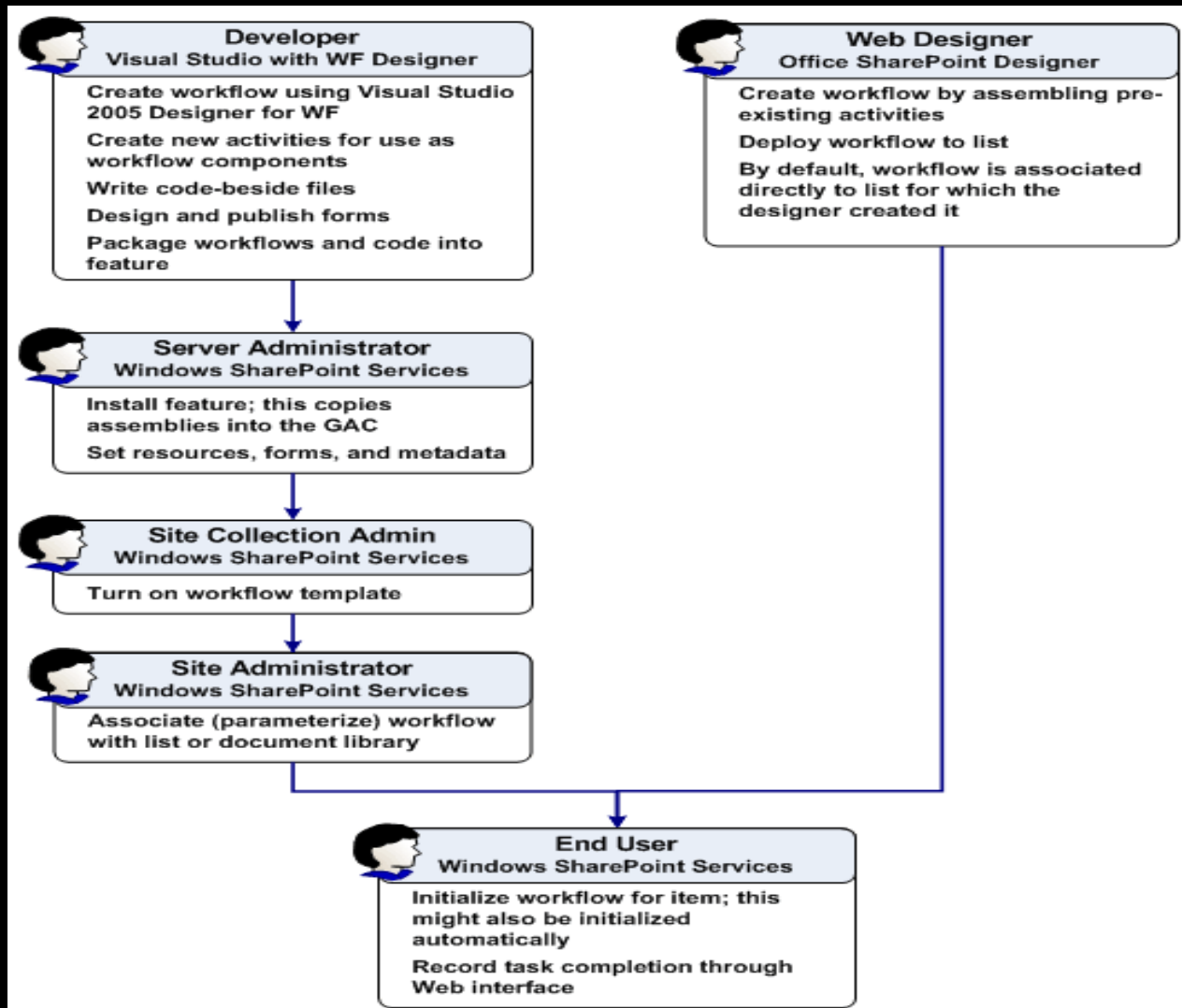
Source: Gartner (February 2009)



Major Players in MOSS Market

- SharePoint Designer
- Windows Workflow Foundation (WF)
- K2
- Nintex
- Metastorm

Designer vs Visual Studio





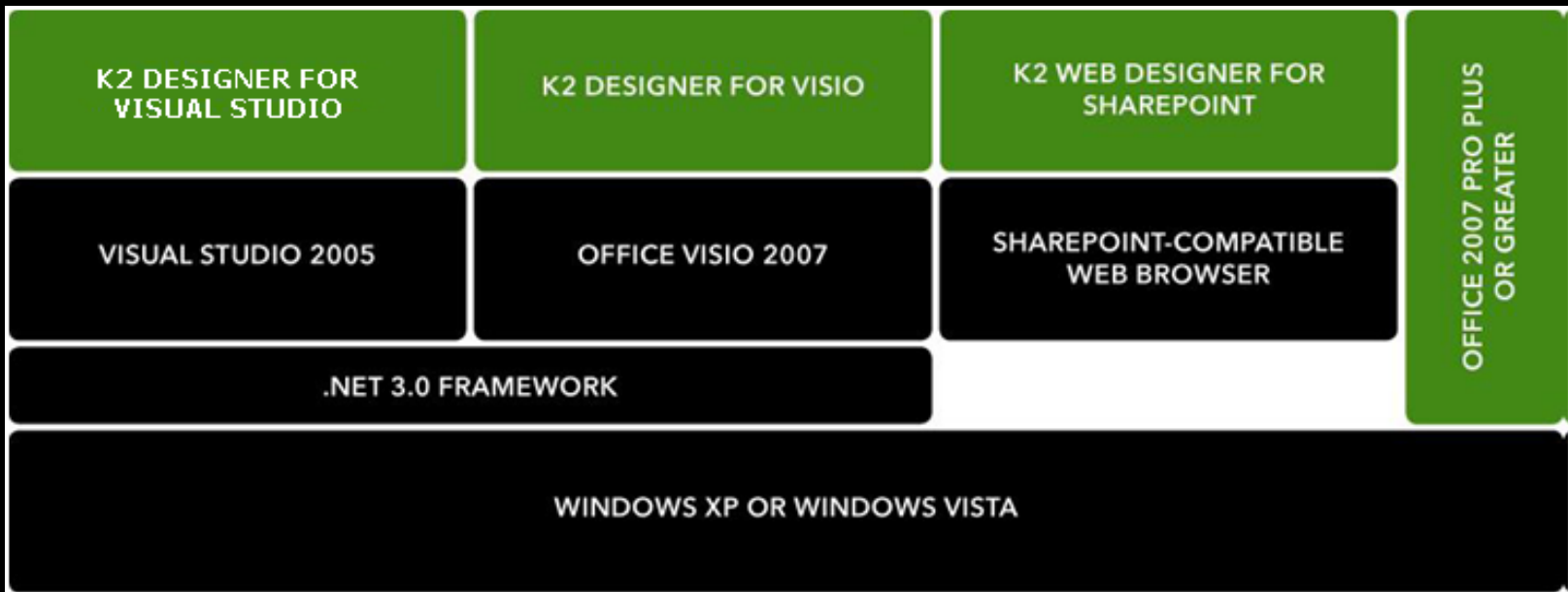
Designer vs Visual Studio

Criteria	SharePoint Designer 2007	Visual Studio for Workflow Foundation
Code-Behind/Beside	No	Yes
List-Specific	Yes	No
Compilation	Workflow storemarkup, workflow rules, and supporting files are d, uncompiled, in a specific document library on the site	Workflow markup file, and code-behind files, compiled into workflow assembly
Association	Association happens when the workflow is authored against the specific list; no later association is necessary or possible	Workflow template must be associated with each list on which it is to be available.
Support Content Types	No	Yes
Forms	Automatically generates Microsoft ASP.NET 2.0 forms, which you can then customize.	Can use any forms technology. For example, Microsoft ASP.NET 2.0 forms for Windows SharePoint Services 3.0 workflows.
Workflow Modifications	No	Yes
Support Custom Activities	No	Yes
Deployment	Automatic	Feature
Debugging	No	Visual Studio debugging
Sequential & State Workflows	Sequential Only	Both Sequential & State



What is K2 BlackPearl

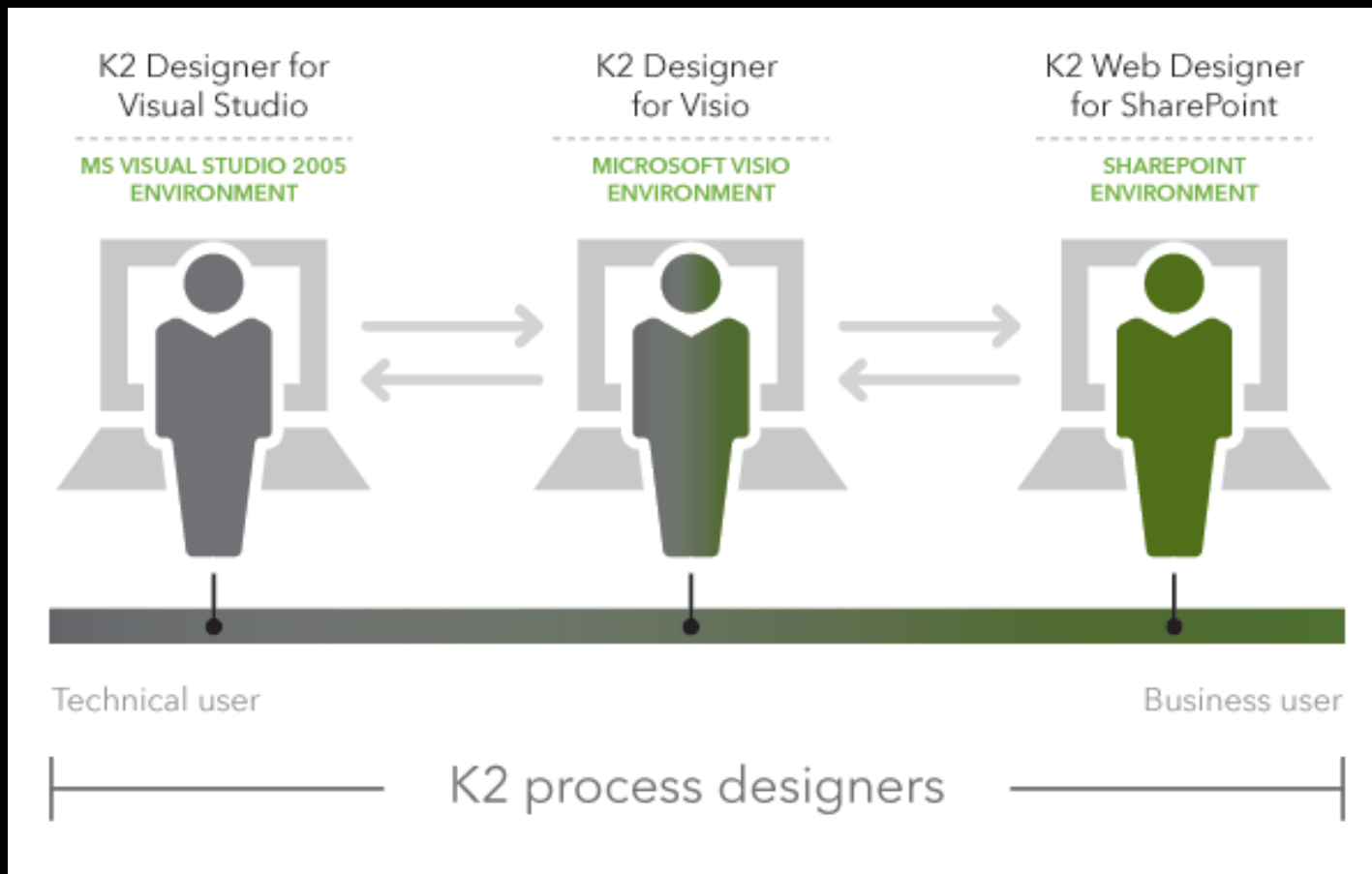
- Fully integrated process designers
 - Visual Studio
 - Visio
 - SharePoint Designer





What is K2 BlackPearl (cont)

- The Right Tool for the Right Person





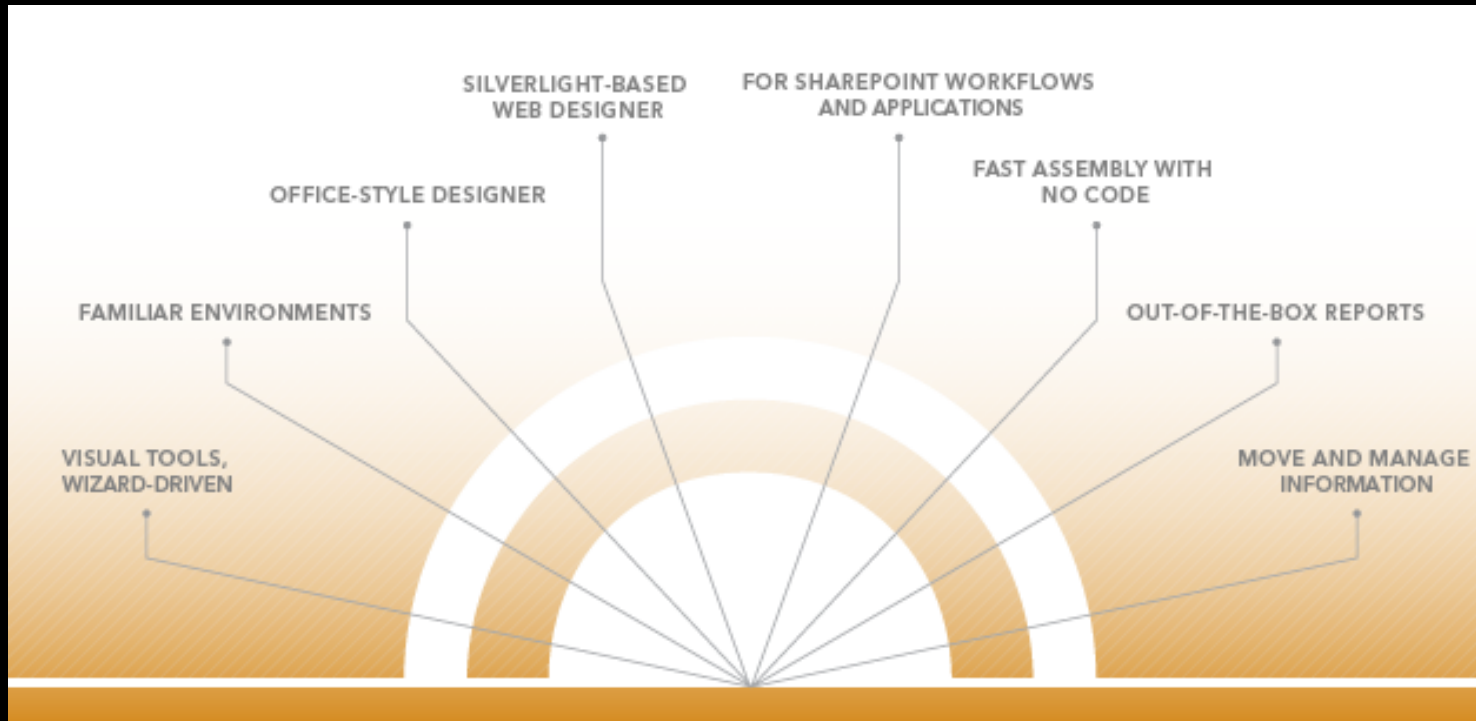
Benefits of K2 blackpearl (cont)

- Increased Efficiency
 - Speed Up Development
 - Reusable Components
- SharePoint Integration Wizards
 - Managing Sites, Libraries, Documents and Lists
 - Starting Processes Based On SharePoint Events
- Office 2007 Integration
 - Alerts and Task Lists Within Office Suite
 - Integration with InfoPath and Forms Server



What is K2 blackpoint

- K2 blackpoint
 - “SharePoint workflow. More features. No code.”
 - SharePoint-Specific





Resources

- Kenneth Lo's Bookmarks
 - delicious.com/kennethlo/worflow
- Gartner Magic Quadrant
 - www.gartner.com
- Workflow Development Tools Comparison
 - klopmp.com/wf-tools



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