



WHITE PAPER

## **Five Key Benefits of Workflow Enabling Your SharePoint Sites**

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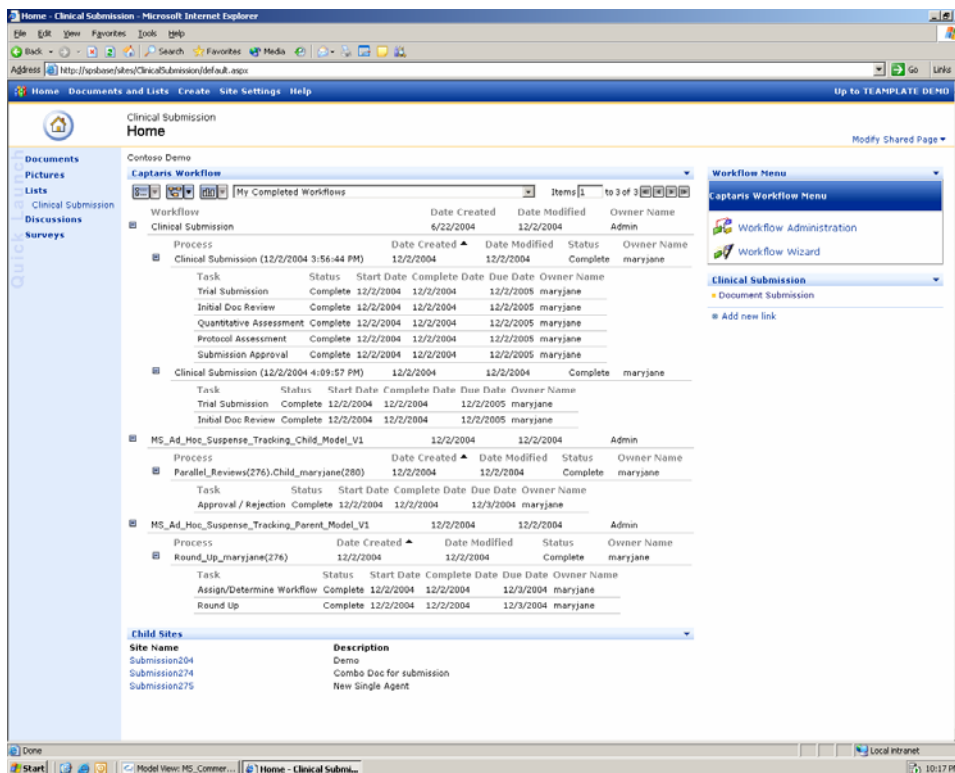
## INTRODUCTION

A Microsoft SharePoint Portal Server 2003 site is a universal tool understood by managers and end-users. SharePoint sites provide file storage, communities for team collaboration and allow users to work together on documents, tasks, contacts, events and other information. People create billions of pieces of productivity elements (purchase orders, invoices, documents, budgets) using tools such as Word and Excel. These documents can be stored into a SharePoint document library to enable collaboration and document sharing. Many organizations are now expanding on the standard SharePoint deployment by adding Business Process Workflow functionality to provide increased structure and control while still maintaining ease-of-use, flexibility and collaborative characteristics.

Organizations add workflow to existing or new SharePoint sites to automate document-centric processes. Captaris Workflow assists organizations and teams with the collaboration, management and approval of documents, as well as the management of other activities and projects which reference documents. SharePoint users are able to access Captaris Workflow functionality without leaving SharePoint or learning a new interface. Workflow Wizards enable non-technical users to build and deploy workflow. Wizard-built workflow functionality can leverage email notifications, task due dates and task escalations, various Web form controls and pre-built Web forms. Captaris Workflow SharePoint Web parts inherit the theme and characteristics of the SharePoint Web site and can be included in templates used to build additional sites. SharePoint users are able to access workflow functionality without leaving the SharePoint site or learning a new user interface. Adoption is rapid and the need for new learning is minimal.

Captaris Workflow provides SharePoint users with easy and direct access to workflow task lists, Workflow Wizards, Business Activity Monitoring (BAM) views and the ability to build, deploy and trigger workflow from within SharePoint without coding or leaving SharePoint. Task lists are user specific and provide a centralized organized task repository to ensure efficient task delivery and completion. Executable process views provide a real-time status map for each process and BAM views provide managers with real-time activity monitoring information for multiple processes.

Figure 1: My Captaris Workflow within SharePoint



## Key Benefits of Workflow Enabling Your SharePoint Sites

- Control
- Efficiency
- Accountability
- Intelligent Views
- Ease-of-use

### CONTROL

By incorporating business processes (as provided by Captaris Workflow) in SharePoint sites, managers attain the much needed control over how information moves through their organization. Workflow automation deployed within SharePoint embeds the process into document repositories to control and manage documents and information according to organizational principles. Workflow can be designed and deployed to ensure that uploaded documents are automatically routed for approval prior to publishing. SharePoint related workflow can manage, control and automate standard reoccurring document centric events such as document upload, collaboration, publishing, moving, or deletion. The workflow can incorporate task assignment, email notifications, due dates and task escalations and re-assignment, document moving, publishing, et cetera.

Workflow tasks are delivered to each participant's individual task list. Everyone knows the tasks assigned, when they were assigned and the task status. Escalation procedures allow organizations to be proactive rather than reactive with business critical information. Workflow can also capture and manage the knowledge of key individuals in the business process. This repository of business knowledge rewards organizations with increased productivity, a better understanding of the organization's structure, and formalized procedures that stay with the organization, even if the employees who created the process leave.

### EFFICIENCY

Everyone knows the frustration and confusion that result from informal document publishing processes. Captaris Workflow models automatically manage the document authoring, reviewing, approval, publishing and task notification activities to allow users to focus on collaboration and task completion. These streamlined workflows ensure efficient, cost effective processes and ensure a rapid Return On Investment (ROI).

Enabling SharePoint with Captaris Workflow has the greatest economic impact in situations where:

- Processes are currently managed via paper forms that are physically moved around the organization
- Multiple employees or teams of employees are collaborating on a single document or unit of work
- Approval steps are numerous and business critical
- Once the organization identifies an ideal area to be automated, the next step is implementation

By analyzing the data accessible with Captaris Workflow, companies can monitor the time it takes to execute business functions and create productivity measurements and continuous process improvement.

### ACCOUNTABILITY

With Captaris Workflow, you can avoid the information black hole of informal workflows. For example, where people use email for uncontrolled, unmanageable and unstructured task assignment, notification and completion. Instead, tasks are structured, controlled and managed by to a task list that is controlled and managed by workflow. Unlike the unstructured email related tasks, workflow tasks cannot be lost, ignored, or deleted. Tasks must be addressed in a timely manner or they may be escalated to an overflow group or to a manager for completion. Service levels may now be tracked. In many cases, the service levels may even be increased or managed with fewer resources as a result of the increased efficiency provided by workflow. Compliance managers can leverage the structure of document-centric workflow because workflow managed decisions may be stored for future retrieval and audit.

SharePoint centric workflow provides the structure to enable organizational and individualized accountability by making people accountable for the completion of a task, an approval, or a function related to the processing of critical documents. The workflow automatically drives the business process ensuring that the right people have the right task, the right information and the right authority level to get the job done in a very effective and time efficient manner.

## INTELLIGENT VIEWS

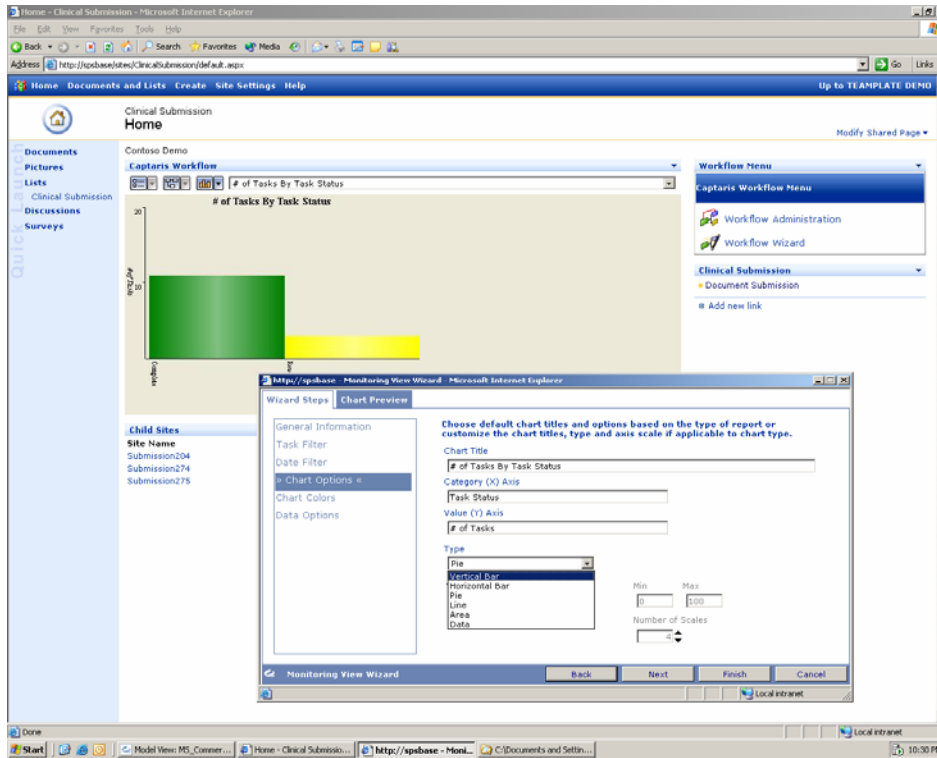
Captaris Workflow provides managers with access to dynamic real-time BAM views into business and process activities. These BAM views can be presented within a SharePoint site to help managers gain an understanding of the current status of workflow activities. Managers have the ability within SharePoint to modify the BAM views or create new views using only a common Web browser. This provides managers with flexibility and provides the agility needed to respond to dynamic environments.

## EASE-OF-USE

Captaris Workflow enhances SharePoint sites by providing knowledge workers with the ability to create and deploy their own document-centric workflows. Workflow Wizards assist in building document routing and approval workflows by using a simple linear step-by-step methodology to build and deploy workflow from within individual SharePoint sites. Workflow can also be designed to provide organizations with the ability to build workflow enabled child sites from the submission of a single Web form. Workflow enabled sites can be automatically created and deployed based on a predefined template thereby accelerating activities and ensuring compliance of organizational standards and simplifying activities.

SharePoint workflow models can be automatically initiated by SharePoint centric events such as uploading a document to a SharePoint folder. The initiation of the workflow results in the automatic assignment of a task coupled with posting the task in the appropriate person(s) workflow task list, delivering notification email and initiating the optional task-due countdown timer. Tasks are automatically assigned and managed by the Captaris Workflow engine and seamlessly delivered to the appropriate individual or group as required. When each task is completed the workflow automatically advances or is reworked to the next individual or group in the workflow process. When the final task is completed the document may be automatically published, moved, or automatically passed into with other sub-processes such as publishing to the corporate Web site, merging with other documents or data stores, distributed via email, or passed into another application or repository for further processing. Workflows can be automatically initiated by any one of several different SharePoint centric events (upload, move, copy, check-in, check-out, update or delete). Specific workflows can be associated with SharePoint Areas, Sites, Libraries, or folders and can be initiated by a specific SharePoint trigger such as a document upload. This provides the flexibility to have several different workflows running within a given SharePoint site, each one assigned to different folders and triggered by different SharePoint events. All of the workflow models and processes are operating in the background and accessible through a SharePoint Web part by SharePoint users by using their standard SharePoint Single Sign-on credentials.

Figure 2: Business Activity Monitoring within SharePoint



Workflow may be designed using the Workflow Wizard or developed using the robust Captaris Workflow Integrated Development Environment (IDE) workflow canvas. Developers work with a familiar tool set that is fully compatible with today's industry leaders. Potential improvements and efficiencies can be gained by importing the SharePoint workflow models into the full IDE and leveraging the ability to access other data stores or integrate workflow into outside applications. The Captaris Workflow IDE provides developers with access to the wizard, built script and enables access to the API, as well as database, InfoPath, XML, external system connectivity and seamless integration with SharePoint and other Microsoft products.

## SUMMARY

Captaris Workflow in standard SharePoint deployments offers effective management and control for the document - centric processes within the company. The increased efficiency and enhanced reliability of the new workflows unleash employees to focus on content, instead of logistics. Easy-to-use wizards ensure a rapid implementation and timely ROI.

To find out more, contact us at [WorkflowInfo@captaris.com](mailto:WorkflowInfo@captaris.com).

## FOR MORE INFORMATION

Captaris Business Information Delivery solutions help organizations automate the information and document flow throughout the information lifecycle (capture, process, manage, deliver). With a comprehensive suite of software and services, Captaris helps organizations to grow revenues and increase profits while meeting compliance goals. Through a global distribution network of leading enterprise technology partners, Captaris has installed more than 90,000 systems in 95 countries in companies of all sizes, including the entire Fortune 100. For more information, visit [www.Captaris.com](http://www.Captaris.com) or call 1.800.443.0806.

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