

# Considering Migrating From FlowForma On-Premise To FlowForma Cloud?

This two page guide will provide you with an understanding of the process involved in migrating from FlowForma On-Premise to Office 365.

*Recently we have witnessed a significant increase in the number of requests we get from customers about migrating from our original On-Premise solution to the Office 365 version of the software.*

*Regular feature and maintenance releases is one of the big advantages of the FlowForma cloud offering, as well as zero down time and access to additional features only available on the cloud version.*

*No doubt the benefits are there, so how do you quantify the migration task, so you can decide when the time is right?*

*In this guide, we'll look at some options ranging from simply using the document generation feature to output the form data in documents, to a full-blown migration of flows, forms, documents, templates, etc.*

## **What You Need to Consider**

There are three main things you need to consider when moving from an On-Premise installation of FlowForma Process Automation to the cloud. Is it just the flows that you've built that you need migrated, so you can start off fresh in a clean new environment? Do you need to migrate the forms created or have you generated documents that you can keep instead? You will also need to think about any overarching "customizations" that you've done.

### **1. Flows**

Migrating flows is generally something every organization wants to export. FlowForma Process Automation has a flow export/import tool, to empower you to do this work, or we can do it for you, if you prefer. You will need to be aware of any lists or integrations with external apps, so that they can be reconfigured after the flow is moved.

### **2. Forms**

Migrating forms is something you may or may not need to do, depending on the process you may not have a requirement to keep them, or you may even have documents generated, that you can keep for reference, instead of the forms.

Our experts can seamlessly manage the migration of your forms.

### 3. Customizations

Every site is different, there will be changes that are specific to your company that will need to be recreated in the new Office 365 environment, from simple things like the general look and feel with company branding, to any custom rules/questions, or jobs that were created for your flows that we need to investigate for you.

Depending on what the customization is, it might be something you can manage yourself or would like FlowForma to take care of for you.

## What The Migration Looks Like

FlowForma - Import flow

<input checked="" type="checkbox"/> OVERWRITE STEP CODE	TITLE	CATEGORY
<input checked="" type="checkbox"/>	step11	New Hire Details
<input checked="" type="checkbox"/>	0ysQLxUZaY	O'Verview
<input checked="" type="checkbox"/>	step16	Prepare Welcome Pack
<input checked="" type="checkbox"/>	step13	Sign-off Documents
<input checked="" type="checkbox"/>	step14	IT Preparation
<input checked="" type="checkbox"/>	step15	Security Access
<input checked="" type="checkbox"/>	step99	Set up employee
<input checked="" type="checkbox"/>	step12	Employee Manager Review

Fig 1: Migrating Processes

FlowForma Migration Tool

Source

FlowForma url:

User:

Password:

is O365?  V3  SP2010

From (inclusive):  To (inclusive):     Use FormPrefix Query

Destination

FlowForma url:

User:

Password:

is O365?

Fig 2: Migrating Forms

### Summary

You need to spend some time considering what it is you're looking to achieve, and what needs to be migrated, it of course also offers the opportunity to "reset" or start a new project for creating a new homepage in the cloud. The three things to consider is who will move the flows and get the site ready to move the forms over to, then if you will actually move forms or do without/replace with documents. Then lastly any "customizations" that you would like to keep, will need to be recreated in Office 365 to match your current environment.

Contact our team today to discuss your migration options at [support@flowforma.com](mailto:support@flowforma.com)

## About FlowForma

FlowForma, the leading provider of Process Automation tools for Microsoft Office 365<sup>®</sup> has been revolutionizing the traditional BPM space with an innovative approach to developing award winning products that empower users to create and streamline processes smarter and faster, utilizing the familiar SharePoint platform, without any coding.

FlowForma is a Microsoft Gold Partner, with over 150,000 users across North America, Europe and Asia. The company is headquartered in Dublin with offices in Boston and London and is motivated by its values to innovate, evolve and achieve with employees, customers and partners.

For further information, visit [www.flowforma.com](http://www.flowforma.com)