FLOWFORMA

A Powerful Workflow Solution for SharePoint

Product Reviewed by Ron Charity

June 2016

PRODUCT VALIDATION REPORT

INTRODUCTION

There are several reasons to consider using workflow tools in your organization. For example, they can simplify, standardize, automate, reduce errors and accelerate business processes. Many organizations have business processes that are cumbersome and rely on a mix of tacit knowledge, email and printed forms that are slow, error prone and unstructured. Some organizations had adopted InfoPath but in January 2014, Microsoft announced that their investment in InfoPath had come to an end. With no recommended migration path in the SharePoint ecosystem, this is where FlowForma shines, with its usability and rich feature set. While some organizations had thought that their processes were too complex to be brought online, FlowForma is proving them wrong. The solution has already been highly successful in automating some of the most complex and fundamental business processes within large organizations.

FlowForma is a proven and easy-to-use business process enablement tool that enables power users to quickly create and publish workflows on SharePoint Online ranging from simple every day workflows to complex workflows. FlowForma is a no-code business process enablement tool with a rich feature set that includes:

⟩ document generation
⟩ conversion and business rules
⟩ an end-to-end solution
⟩ data capture, business logic and document assembly as an output for business processes

FlowForma customers report that they benefit from the speed at which FlowForma enables them to prototype processes quickly.

The product integrates directly with your SharePoint (on/off premise) to leverage all the benefits that this powerful collaboration platform provides, including document management, lists, views, and Power BI.

This product review will cover FlowForma designed for digitizing your organization's workflows leveraging your SharePoint investment. In this review, we'll walk you through the

FlowForma product utilizing a MacBook Air, Windows 10 PCs, iPad Air and SharePoint Online. In addition, we'll review the installation experience, training and support resources available to the user.

TECHNICAL REQUIREMENTS

The following are the technical requirements for the FlowForma product:

- Office 365 tenancy
- SharePoint Online tenancy

EVALUATION APPROACH

FlowForma was evaluated using a MacBook Air, iPad Air and Windows 10 clients. The author utilized his Office 365 tenancy and data set and didn't read any of the training material so he could review the user experience in a real-world manner – learning on the go.

Note that once the initial first impression of the review was completed, the author read the training materials and referenced the online support services for review purposes.

INSTALLATION AND FIRST IMPRESSION

To install FlowForma, simply log in to your Office 365 tenancy and go to the App Store. Search for FlowForma and click Add to begin installation of the 30-day trial add-in as depicted in figure 1.
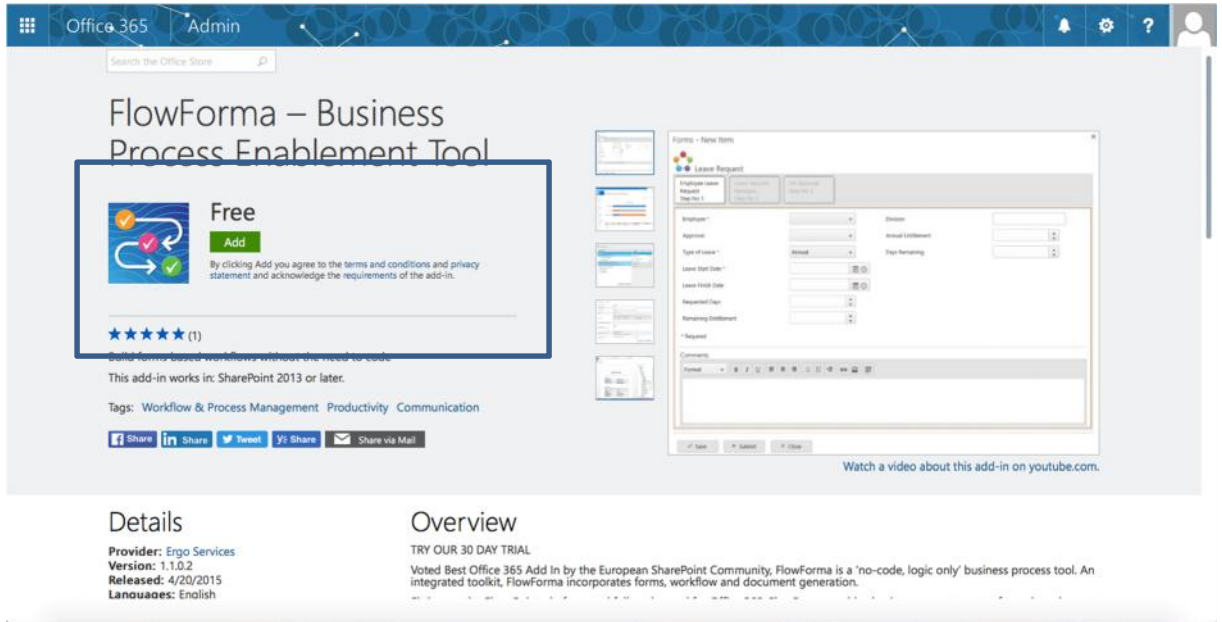
Figure 1

You will be prompted for some information including name, email address and company name. Once you click Accept for the licensing terms, the installation process will prompt you for a location to install FlowForma – note the author created a Team Sites site collection for the review. Once completed, you'll see the FlowForma Welcome page shown in figure 2.
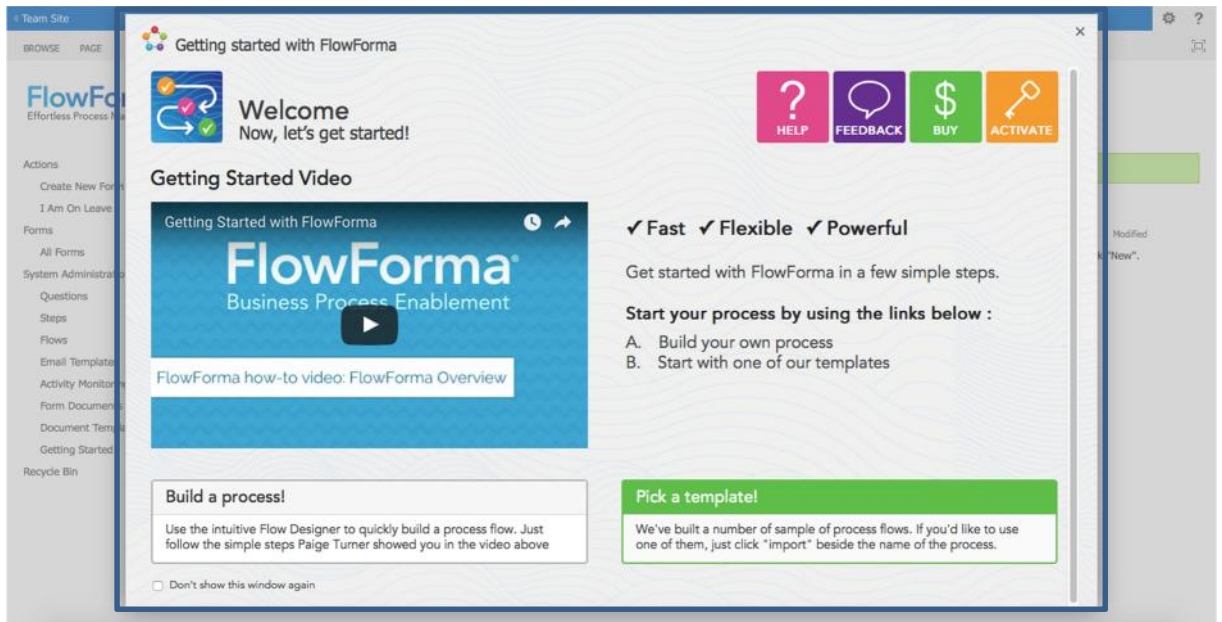

Figure 2

You are now ready to begin using FlowForma.

FLOWFORMA BASICS

Before getting started, you should watch the video, "Getting Started with FlowForma" – refer to Welcome page for link to video.
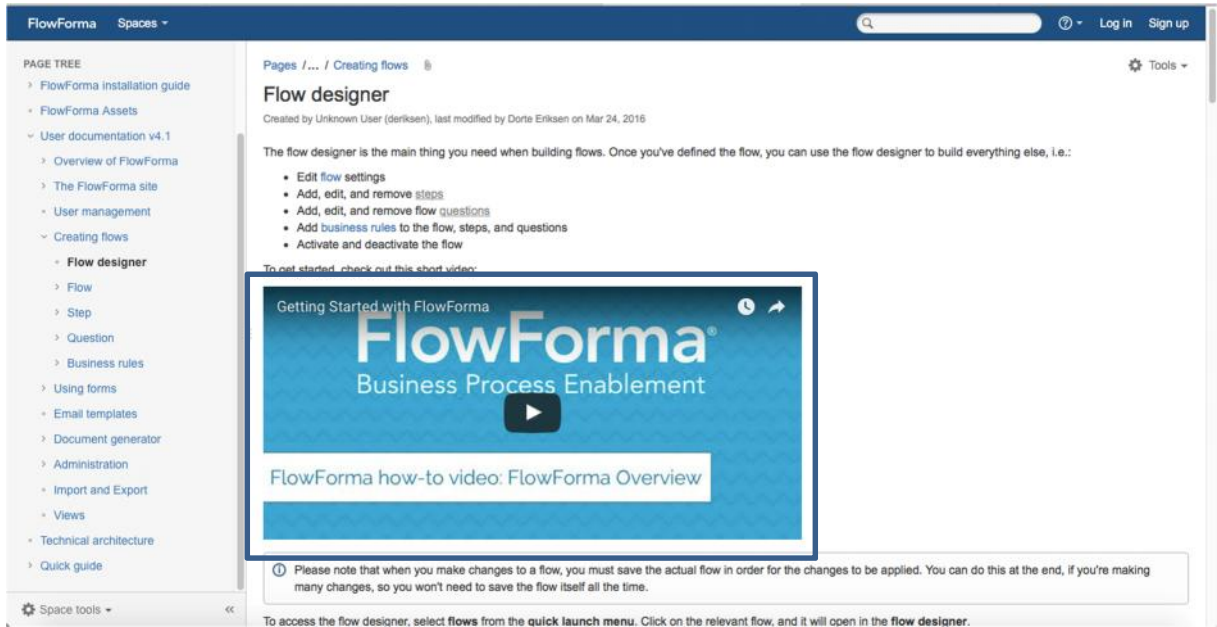

Figure 3

FlowForma workflows consist of flows, steps, questions and business rules which are brought together into a flow using the flow designer (figure 4). The flow designer is an intuitive interface for creating, fine tuning and publishing your workflows.
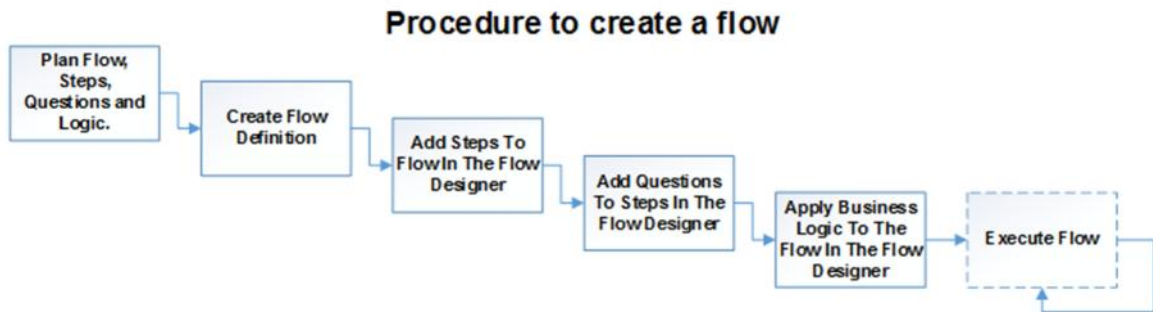

Figure 4

The following is a more detailed explanation of each:

) Flows – The FlowForma term for workflows. To define a new flow, you select New Item and enter a Title, Group, Flow Administrator and Form Prefix. Once you have entered the information, click Save.

) Steps – A flow consists of steps. Note a form isn't saved until you've saved or submitted the first step. Steps are essentially logical sections of the flow. Users will supply information in each of the steps you create. There's no limit as to how many steps you can add. You might use a step to capture information, sign off and approve a purchase order as an example.

) Questions – Within your steps, questions are fields defined by you that are specific to the workflow you are creating. For example, a question might ask how many pencils are required for a purchase order. Question types can include choice, date, lookup and number – there are several options you can choose from.

) Business rules – You use business rules to add logic to your flows (either when they are started or completed), steps (either when they are started or completed), and questions (when they are changed), or sub-questions (also when they are changed).

With the overview completed, let's have a look at the flow designer interface.

INTERFACE BASICS

Before we dive into FlowForma, let's review some of the interface basics visible in the FlowForma 30-day trial. To start, you can browse to the site where you installed FlowForma and from the list of actions on the left of the page, click **Flows** (figure 5). Throughout the product there is help and tooltips that help you get started quickly and make use of the features.
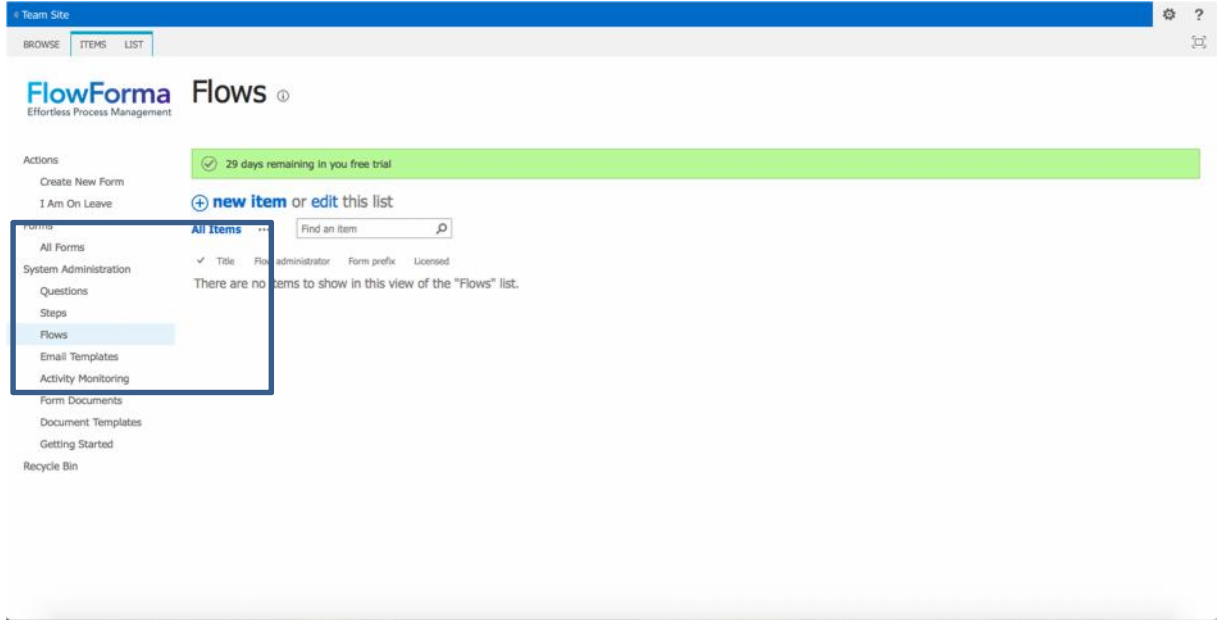
Figure 5

Click **new item** (figure 5) and a form will appear (figure 6) asking for a Title, Group, Flow Administrator and Form Prefix. When you have entered the information, click **Save**.
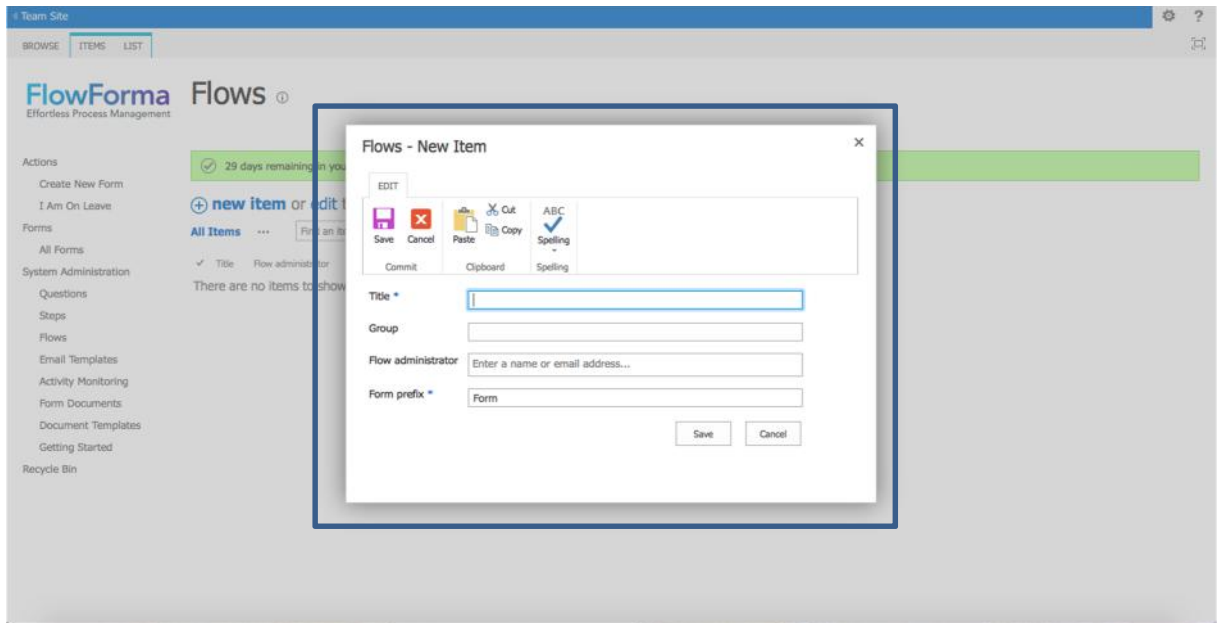

Figure 6

Once have clicked **Save** the flow designer will appear (figure 7). The designer consists of two areas: 1) the pane to the left that lists the flows steps and questions, and 2) the right-hand pane that provides the interface for adding steps, questions and business logic. The right-hand pane

is content sensitive. Specifically, if you select the form you can add steps, if you select a step you can add questions, and if you select steps or questions you can add business logic.
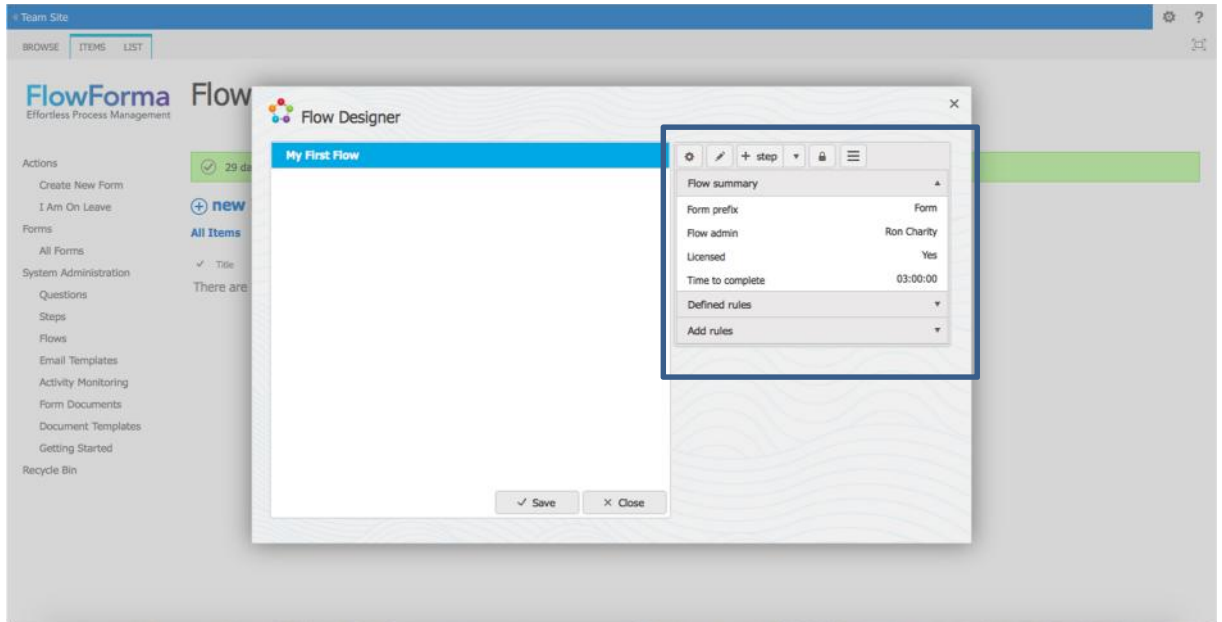

Figure 7

To add a step, click the **+ step** button. Note that when I created the flows for this review, I wrote down my basic flow on paper and then began creating the flow in FlowForma. I created the steps first and then added the questions and finally the business logic.

When adding a step, you will be asked for title, step code (I accepted the defaults), entered a description and assigned the step to myself. Once completed I saved. I repeated these steps for each step in my flow.

Once you have added your steps it's time for the questions. Select the first step that you want to add a question to and then click **+ Question** and in the form (figure 8) enter the Question title, Question code (I accepted the default) and select the Question type (Line of text, Choice, Number, etc.), choose whether its required or not, enter a description, enter values if needed and then save the question item. Repeat the steps for each of your questions.
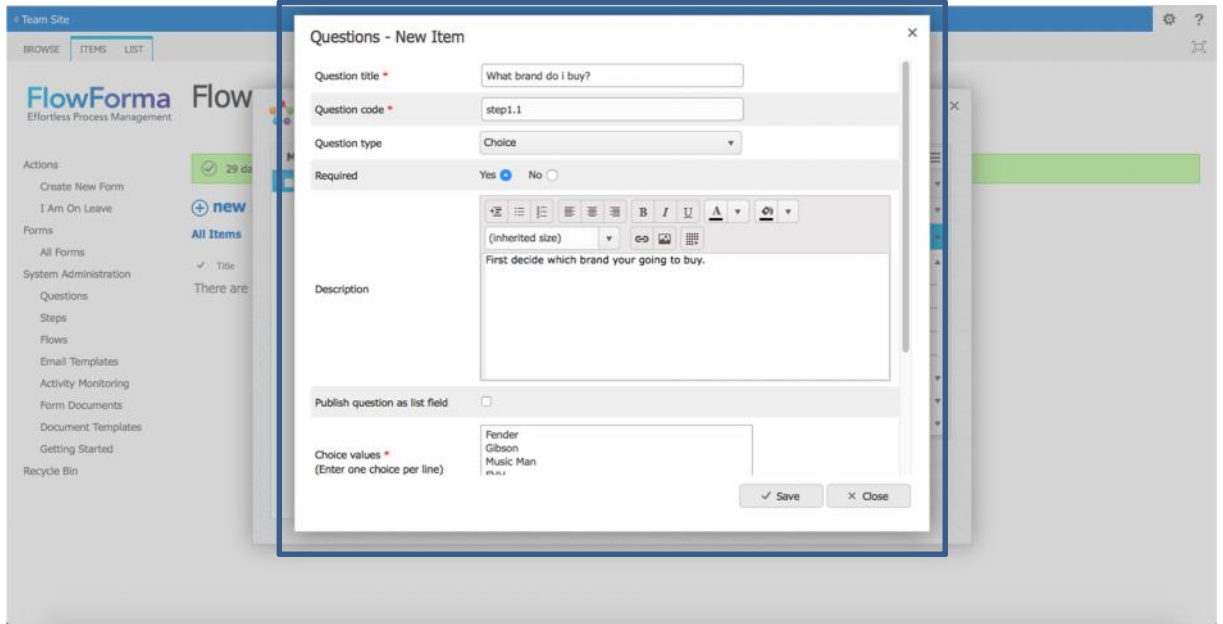
Figure 8

Once you have entered all your steps and questions you can add business logic. Business logic can be used to hide or expose steps and/or questions based on user inputs. The logic helps you intuitively guide the user through the flow. To view the business logic options for a step or question (figure 9), click **Add Rules**.
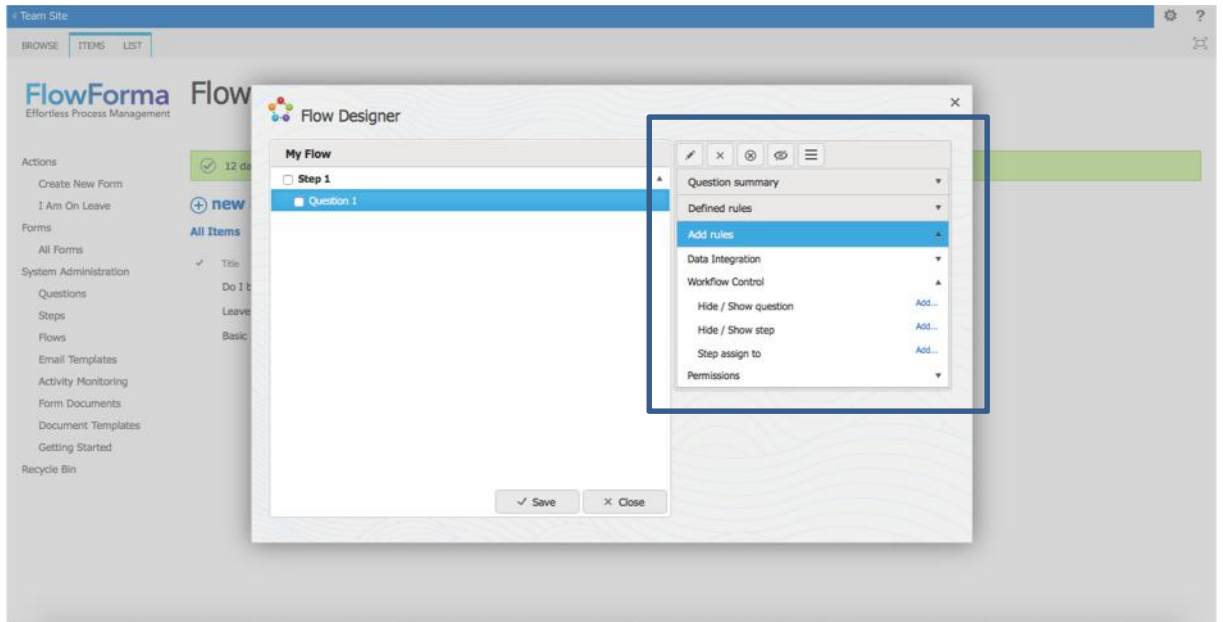

Figure 9

Once you have completed your flow you are able to consume it by clicking on **Create New Form** (under Actions) and selecting your flow (figure 10).
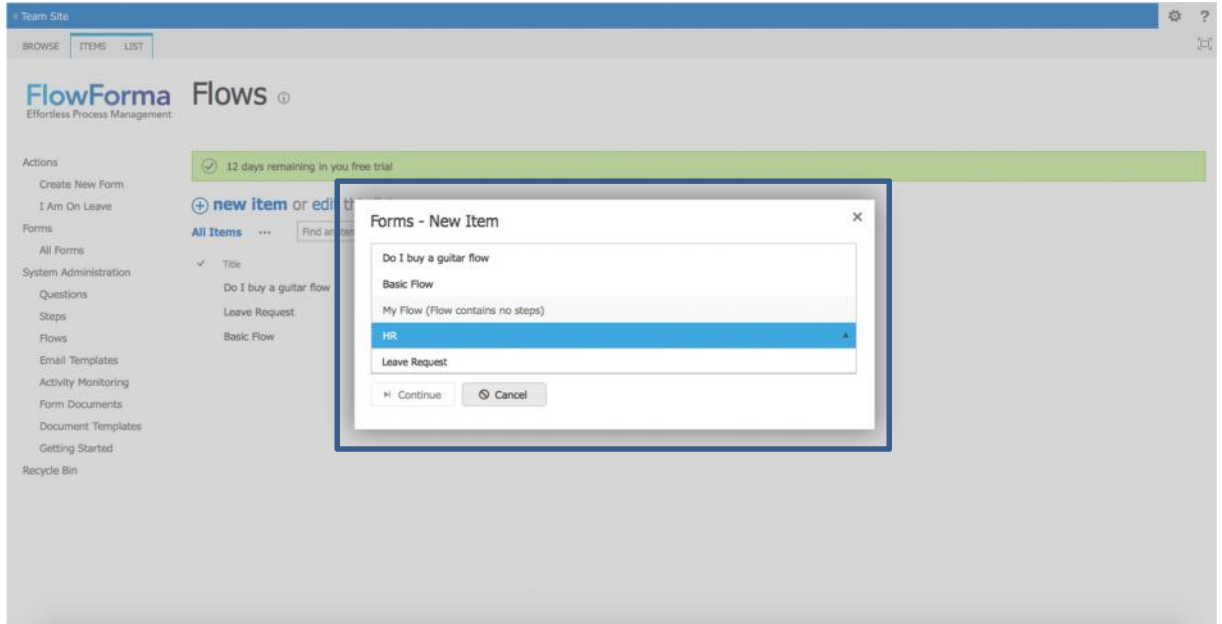
Figure 10

Once you have selected your flow, it executes using an intuitive interface that shows you the steps and questions. Steps are listed across the top of the form and the questions associated with the step are listed in the middle of the form. FlowForma provides buttons to Save, Submit or Close the flow (figure 11). For subsequent steps, FlowForma provides a Delegate button that enables you to delegate the approval to another person.
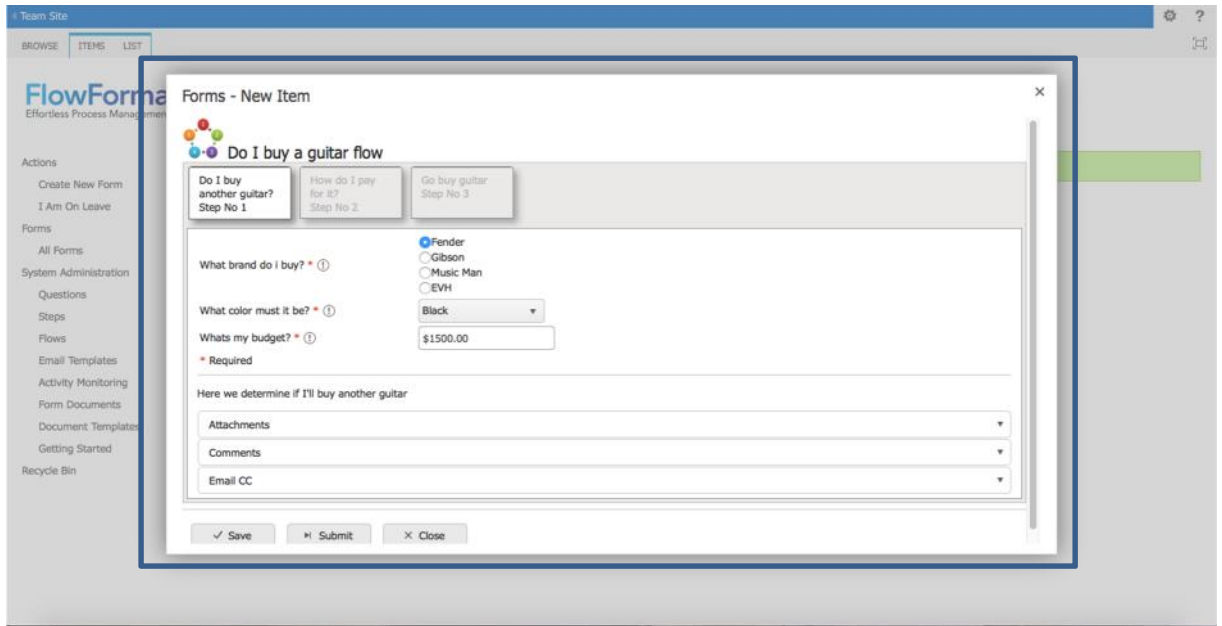
Figure 11

The interface is very intuitive. If you allocate some time to watch the videos and experiment with simple workflows, you will find that creating flows is pretty simple and you can leverage the rich feature set gradually as you become more comfortable with FlowForma.

Another highlight is that FlowForma enables a power user to kick off a sub-process from within a process.

FlowForma also has a document generation feature that allows you to embed advanced document generation functionality into your flow using Microsoft Office Word and an add-in. The generator allows you to dynamically create documents based on one or multiple document templates by adding data from your form fields to your templates. As a result, the document content is tailored to your intended recipient.

Once you install the FlowForma add-in the Word ribbon will include a FlowForma tab (figure 12):
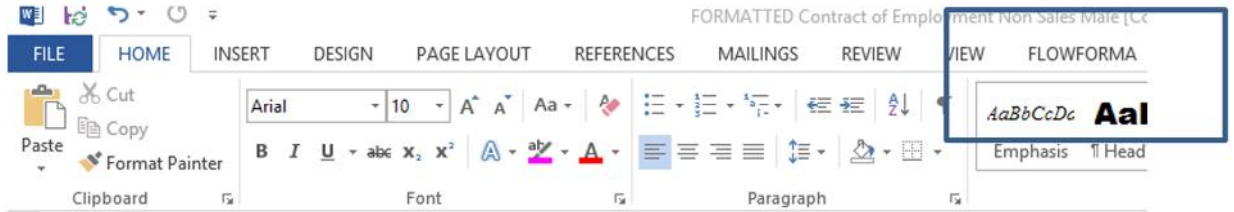
Figure 12

Once you have the add-in you can create Word documents and add information from the workflows as shown in figure 13.
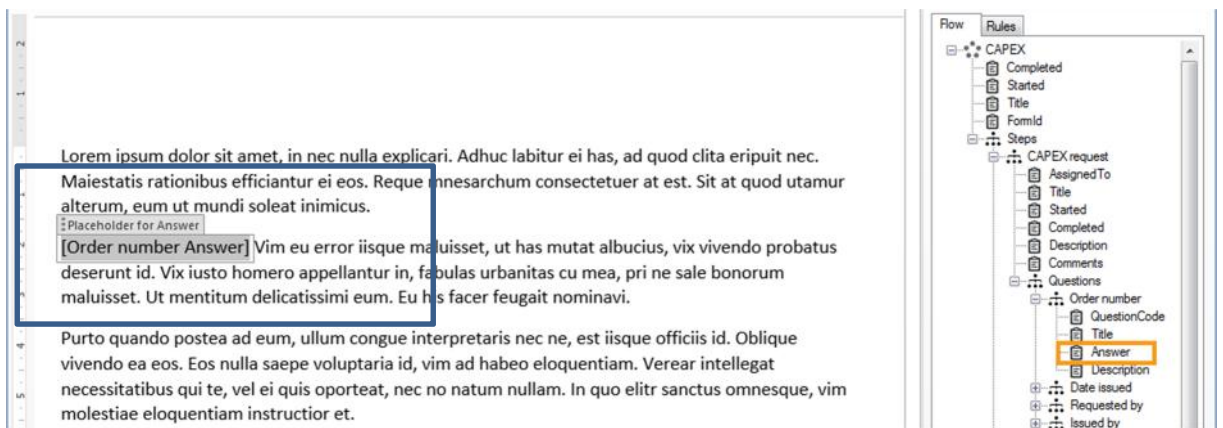
Figure 13

To add FlowForma workflow data to a document, place the mouse at the required location in the Word document, move the mouse to the FlowForma item required and double-click the item. The item will now appear in the document. To add more items simply repeat the process throughout the document.

To install the Word document generator add-in, you need the following:

) Microsoft Office 2010 or 2013
) .NET Framework 4.5

INFOPATH MIGRATION

For those with InfoPath, FlowForma has a migration tool that an organization can use to migrate business process steps and fields into the FlowForma system and apply business logic required. The tool supports InfoPath 2010 and 2013.

EXTENSIBILTY

FlowForma is architected to allow custom question type and business rule extensions to be easily incorporated into the product. Also, FlowForma supports data integration from other third-party systems and provides direct integration with Microsoft SQL Server.

This customization functionality allows FlowForma users to extend the types of data captured in the form, for example, to capture complex multi-part references, and also extends the actions that may be carried out during the execution of the flow, for example, to send or receive information to an external system via a web service.

The current version supports an easy route to customization using client-side code based on JavaScript and HTML, interacting with the FlowForma API. The custom code components are stored within the FlowForma site and, once configured, are presented in the flow designer as additional options. You can use these new options on any flow in that site. For more information, read the FlowForma v4 Extensibility Overview - Version 1.0 14 June 2016.

Note that customizations of FlowForma was not tested by the author.

SUPPORT

The following support is available to help you get started:

- Demo – www.flowforma.com/demo
- Trial – www.flowforma.com/trial
- Training videos – https://www.youtube.com/channel/UCSx81du-yaCJHs5W-z7lFcg
- Quick guide – http://docs.flowforma.com/display/FFv41/Quick+guide
- Manual – http://docs.flowforma.com/display/FFv41/User+documentation+v4.1
- Blog – www.flowforma.com/blog
- Discussions – Coming soon
- FAQ – www.flowforma.com/faq

FLOWFORMA FEATURE ROADMAP

September 2016 will see FlowForma release its next big feature, enabling users to perform collaborative decision making and voting, along with the added security benefit of e-signatures.

RATING

The following is a summary of the review that was performed over three weeks.

Criteria	Rating	Comments
Download an installation	5/5	Was productive within minutes of use.
User interface / ease of use	5/5	Intuitive and easy to use, follows Microsoft design patterns.
MacBook/iPad/ Windows Experience	4/5	Consistent across all platforms tested. Add-in not available for Mac.
Workflow Designer	5/5	Intuitive and easy to use designer requires minimal time to create workflows.
Toolkit	5/5	For extending the base product to support custom integration.
Templates	3/5	Some basic templates are provided but selection could be better.
Customizable forms	4/5	Forms can be customized.
Security	5/5	Utilizes Microsoft security to security trim workflows.
InfoPath Migration	5/5	FlowForma provides a migration tool for migrating InfoPath forms to

		FlowForma format.
Support	4/5	Support in place and they are developing areas such as discussions and other self-help. End user focused quick start videos would help with skills ramp up.
Overall	*4/5*	

COMPANY OVERVIEW

Established in 2012, FlowForma (www.flowforma.com) supports organizations in adhering to consistent business process management, and improved organizational efficiency and productivity through technology. The company is headquartered in Dublin with offices in London and Lithuania.

Dedicated to helping its customers in making the complex simple, May 2013 saw the company launch its first product, FlowForma, a business process enablement tool, which sits on the proven Microsoft SharePoint platform. On an incredible journey, FlowForma comprises of a team of 40 experts, from business analysts to SharePoint architects and developers. All team members have a deep understanding of business processes and are experienced in making process improvements through technology. In November 2015, FlowForma was voted Best Office 365 Add in (App) 2015 by the European SharePoint Conference. FlowForma is a spin-off product company of Ireland's leading IT solutions provider, Ergo.

FlowForma can be reached through this link http://www.flowforma.com/contactus.

SUMMARY

SharePoint is an excellent platform for providing collaboration, social, BI and mobile services. It also provides an excellent platform for business process automation as FlowForma demonstrates. Adding FlowForma enriches SharePoint's feature set by providing an intuitive means of creating, publishing and consuming business processes through common devices

(tablets, laptops) available in organizations today. FlowForma is easy to use, basic workflows can be created in minutes by power users, the interface was very responsive and support questions were answered within a 24-hour period.

If you have feedback, questions or want to share your experience, contact me at roncharity@gmail.com.

PRODUCT REVIEWED BY RON CHARITY

Ron Charity is an enterprise architect and has worked in consulting for 20-plus years and managed large SharePoint environments for 5 years. He has worked in the USA, Canada, Australia and Europe – providing him with a diverse background and global perspective on IT. Ron has worked with SharePoint since its 2001 beta and is focused on governance, collaboration, search, social, mobility, and document management. He has written articles on governance, collaboration, document management, and mobility.

PRODUCT VALIDATION REPORT

The Product Validation Report produced by SharePointReviews.com in collaboration with industry's most renowned experts delivers independent validation of vendor product capabilities and provides insights on how the product compliments customers' native Microsoft SharePoint deployments. This report should not be treated as a replacement for the evaluation process that you would normally conduct before making a purchasing decision, but it will provide independent information on the product to help you with your decision. This report includes opinions of the reviewer(s), and neither SharePointReviews.com nor the reviewers are responsible for any issues that may arise during your usage of the product. This research was sponsored by FlowForma.