EMPOWERING BUSINESS USERS
TO MAKE INFORMED DECISIONS...

Business Process
Management (BPM) for
Microsoft® Office 365®

FlowForma®

Step into a world where business processes are easily managed, where data flows exactly how it should, where bottlenecks are identified quickly, process reports are generated with the click of a button and you make better decisions faster.

Start empowering your business users with the FlowForma Business Process Management (BPM) tool for Office 365. A no-code, logic only BPM tool, FlowForma BPM enables business users to deploy business processes with speed and flexibility, no matter what the complexity. Sitting on the SharePoint® platform, the FlowForma Cloud BPM tool incorporates forms, workflow, document generation and decision making all in one place.

FlowForma®

FlowForma BPM
for Microsoft Office 365

An award-winning Microsoft Office 365 app, FlowForma BPM enables business users and Heads of Departments to quickly implement processes such as HR on-boarding, new product development and clinical trials as well as many others, increasing organizational efficiency and productivity.

FlowForma BPM is a proven business process enablement tool. Built for business power users, it enables organizations to seamlessly build out online processes. From the simple every day to the more complex processes, FlowForma BPM permits its customers to drive business process efficiency simply and intuitively.

With features such as document generation, conversion and business rules, FlowForma provides an end-to-end solution that incorporates data capture, business logic and document assembly as an output for business processes. The product integrates directly with your Microsoft SharePoint or Office 365 environment to leverage all the benefits that this powerful collaboration platform provides, including document management, lists, views, and Power BI.

FlowForma BPM is designed to be configured by the people who understand your business need. Business consultants, power users, business analysts are all examples of people who use our Flow Designer tool to quickly create complete solutions on the SharePoint platform.

Accelerate Your InfoPath Migration
Dedicated to making the complex simple, FlowForma BPM has simplified the InfoPath forms migration challenge for clients, by developing a unique InfoPath migration tool. This tool enables users to accelerate the migration of business process steps and fields to the FlowForma BPM environment.

Document
Generation

Workflow

FlowForma BPM

Collaborative
& Informed
Decision Making

Forms
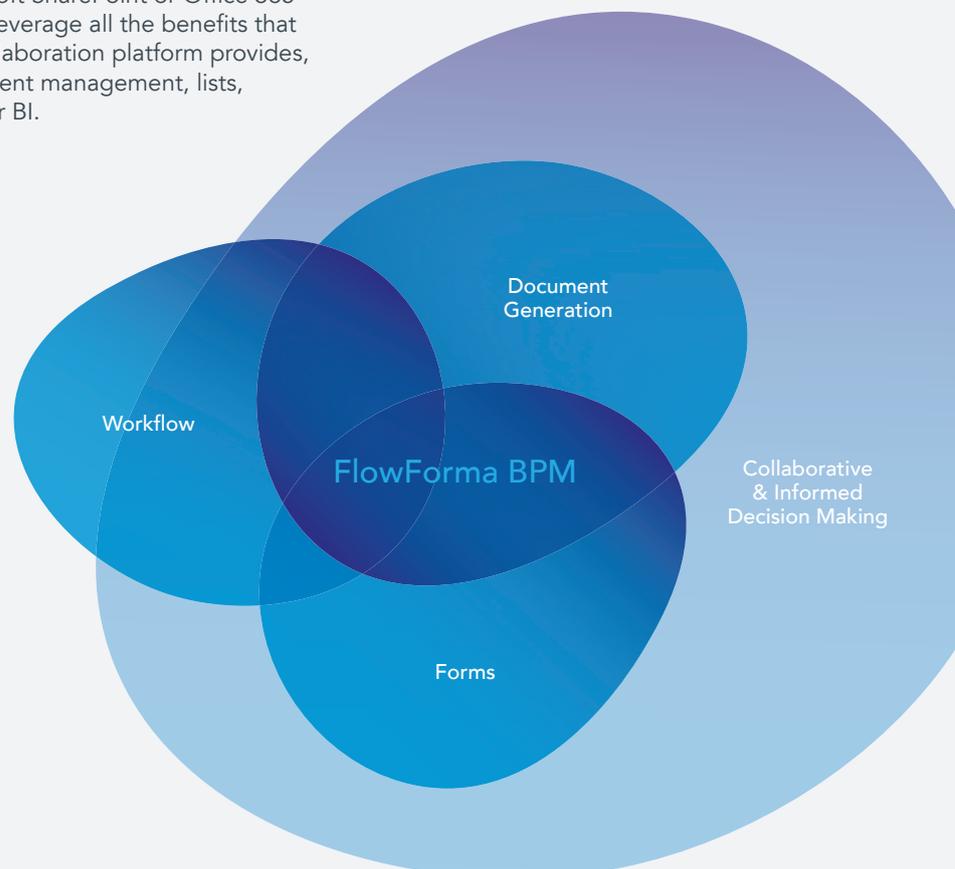
Microsoft
Azure

Certified

HELPING
YOU ADAPT

All organizations face continuous change. Whether corporate or public sector, large multinationals or small enterprises, organizations are under continuous pressure to respond quickly to changes in their market. Competitive threats, legislative changes, and other influences require that organizations rapidly adapt how they do business and deliver this business change cost effectively.

FlowForma®

FlowForma BPM is deployed globally in a broad spectrum of organizations from healthcare bodies and pharmaceutical companies to manufacturers and professional services companies. Some common business challenges FlowForma has helped organizations address include:

Fast Moving Commercial Goods (FMCG) – New Product Development / Innovation Lifecycle

Businesses within the Fast Moving Consumer Goods (FMCG) sector are utilizing FlowForma BPM to assist them in adding structure and formality to their approach to open innovation, allowing them to capture feedback and ideas from customers, suppliers and employees. Realizing that innovation does not happen in isolation, customers are using FlowForma BPM to enable collaboration across departments, suppliers and partners. The structure brought to this process from using the FlowForma BPM tool is enabling these organizations to innovate quicker and gain a competitive advantage.

FlowForma BPM supports complex stage gate product development, capturing all relevant information prior to each gate and providing a group decision making ability when each gate is reached.

Professional Services – Legal Matter Management

The FlowForma BPM tool is built on top of SharePoint to take advantage of standard SharePoint features like document management and search. Combining document management with the FlowForma BPM tool's forms, workflow and document generation allows legal companies to manage and maintain legal matters in a centralized area.

FlowForma BPM forms capture all required data when engaging a new client in a legal matter, matter documents are generated from this information. At each stage gate the information can be approved/signed off. Our clients then use legal document/email templates to autofill information before generating and sending it onto the correct legal body. The entire system contains a full audit trail of who accessed what information throughout the legal matter.

Life Sciences – Pharmacovigilance, Artworks

Pharmaceuticals are utilizing the FlowForma BPM tool to manage their pharmacovigilance process. It provides them with the ability to accurately and securely collect, assess, and monitor effects of their products. The FlowForma BPM tool has the ability to log and time stamp data which makes audits seamless.

Our Life Sciences feature pack ensures that FlowForma solutions comply with FDA regulations, with e-signatures, deeper audit trails and automatic generation of process specifications built into the solution.

Healthcare – Performance Appraisal, Nurse/Doctor Revalidation

Performance appraisal is a time consuming and tedious process in most sectors, but in healthcare this is often amplified given the size of these organizations and the complexities of contracts. A number of hospitals are utilizing FlowForma BPM to accelerate this process and provide clear visibility to Heads of HR with regards to status, bottlenecks etc. One hospital has rolled out self-assessment through the tool, with results instantly received by HR.

UK healthcare customers are using the FlowForma BPM tool to manage the nurse and midwife revalidation process and easily output reports. FlowForma BPM facilitates both nurses and midwifes to track their Continuous Professional Development every three years to apply for revalidation.

Public Accessible Forms

FlowForma has an anonymous access feature that enables Microsoft Office 365 customers to publish forms and make them available to the public. Anonymous users can fill in forms without logging into any portal. We have implemented this solution for several customers, one example being the GAA. The publicly accessible form can be obtained directly from the GAA website. Public users fill in the form and submit it securely into the GAA Office 365 site. This form will then kick off a GAA process relating to that form. Public users are notified at their personal email address when the form has gone through certain stages.

KEY BENEFITS

Enablement

The FlowForma BPM tool enables business change by allowing rapid prototyping of business solutions, which can be configured by the process owner or business decision maker, with an intuitive user interface to encourage adoption.

Easy to use user interface with a Visual Flow Designer option

Integrated forms, workflow and document generation

Encourages ownership of processes and data

Accessible on desktop and mobile

Agility

Processes are delivered quickly, so that they are relevant from the moment they are enabled. There are features to monitor and refine the processes, when resource changes or external factors necessitate change.

At least ten times faster delivery of working solutions

Perfect for prototyping, ensuring the production process is right first time

Facilitates process evolution

InfoPath conversion utility to accelerate conversion of legacy InfoPath solutions

In-Flight Process Change

Processes are adapted to the circumstances. Each time the process executes, business rules adjust resource assignments, data collection, steps executed and communications generated, so that every process is tailored to the specific circumstances at that time.

Each execution of the workflow is unique

The workflow and form adapts based on the data collected

Workflows can interact so that actions in different resource pools can impact each other

Visibility

The user is presented with a full view of the process, its current status, future steps and past history. Process performance can be compared to benchmarks, with bottlenecks identified and investigated. Automated communications can be generated to drive resources to complete assigned steps. All information captured throughout the process is available for reporting.

Ability to create relationships between parent and multiple child forms

Allows all resources involved in achieving the process goal to see the full history of the process and its current status

Communicates internally and externally to drive processes forward

Transparency

Access to FlowForma BPM is achieved via SharePoint security. All process steps are assigned to specific resources and the workflow record is stamped with their unique credentials when steps are completed.

All process steps are assigned to resources

Contributions from resources are stored in the form

Workflow progression is stored in the form, with a record of who did what and when

Value

FlowForma BPM combines several functions (forms, workflow, document generation and mobile accessibility) into one tool. This single tool seamlessly integrates functions which increases efficiency of both building solutions and ultimately delivering user acceptance.

Integration of workflow, forms and communications increases configuration productivity

Easy to use end user interface reduces the number of clicks required to enter data and progress workflow

Only pay for active users

COLLABORATIVE AND
INFORMED DECISION MAKING

The FlowForma BPM tool uniquely supports collaborative decision making functionality within the workflow/form.

Resources can be identified as voters and information collected during a workflow can be presented in a single view, where each voter may cast their vote based on the information presented to them at that time and optionally record their rationale. Voting results are presented in a graphical and tabular format on a summary process step.

Have a single pane view of all relevant information

Multiple voters may review and cast their votes

Overall controller initiates, reviews and closes the vote

Votes may be public or private
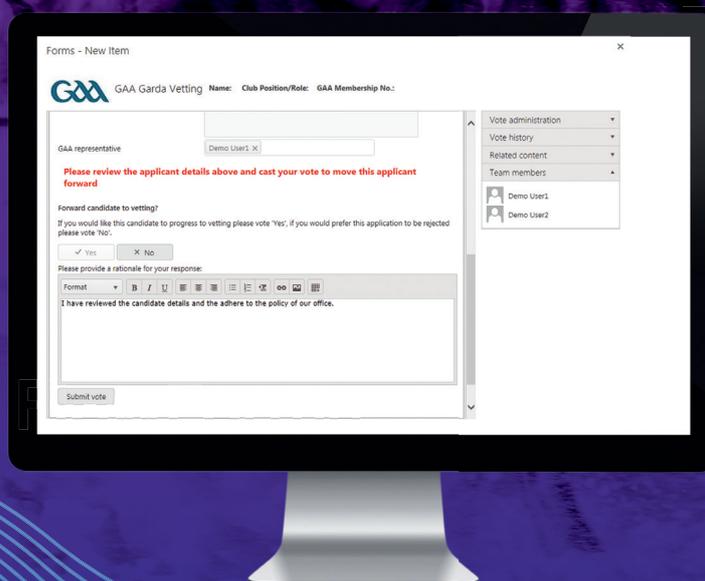
Figure 1 E-Voting:
Showing voting buttons, rationale, expandable panels

How it works...
No code, logic only

Figure 2 Expenses Form:
Showing header, step bar,
questions (multiple types),
actions buttons
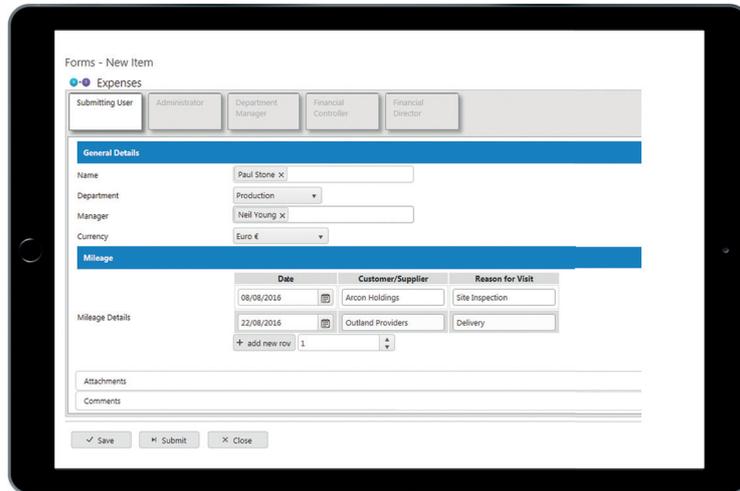
FlowForma BPM allows process owners to take
control of the configuration of all aspects of the
process by using the Flow Designer to define
process steps, questions and business rules.
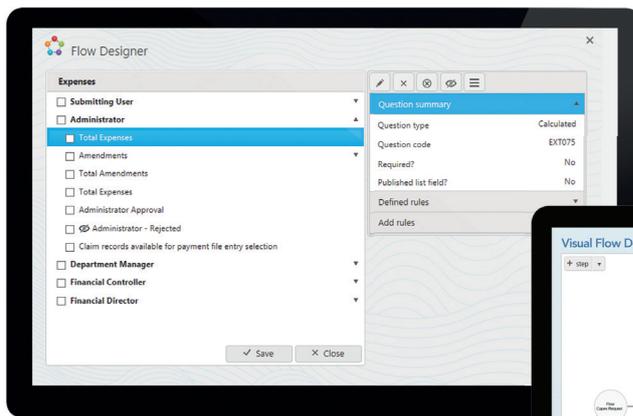
Figure 3 Flow Designer:
Showing steps, questions
(one hidden), question summary
(of total expenses)
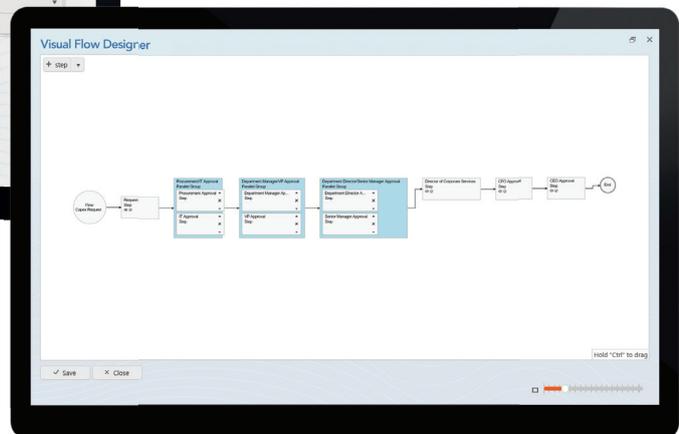
Figure 4 Visual Flow Designer:
Visually build processes using
the intuitive drag and drop
functionality

How it works...
(continued)

Once a process template is defined, the process can be executed repeatedly. Process performance can be monitored, comparing actual process durations against benchmarks. Individual instances of poorly performing processes can be investigated, as all information on the process is stored within the form on SharePoint.

The flexibility of FlowForma BPM allows both simple and complex processes to be implemented, involving sequential or parallel steps. Connected processes can run in multiple sites, serving multiple resource pools.

FlowForma BPM can interact with data stored in SharePoint and external systems, pushing and pulling information to and from the external systems and the form. This reduces the effort of completion as information can be automatically filled in as the workflow progresses.

Business rules make the process dynamic, ensuring that only the necessary work is done based on the information captured through the workflow.

FlowForma®
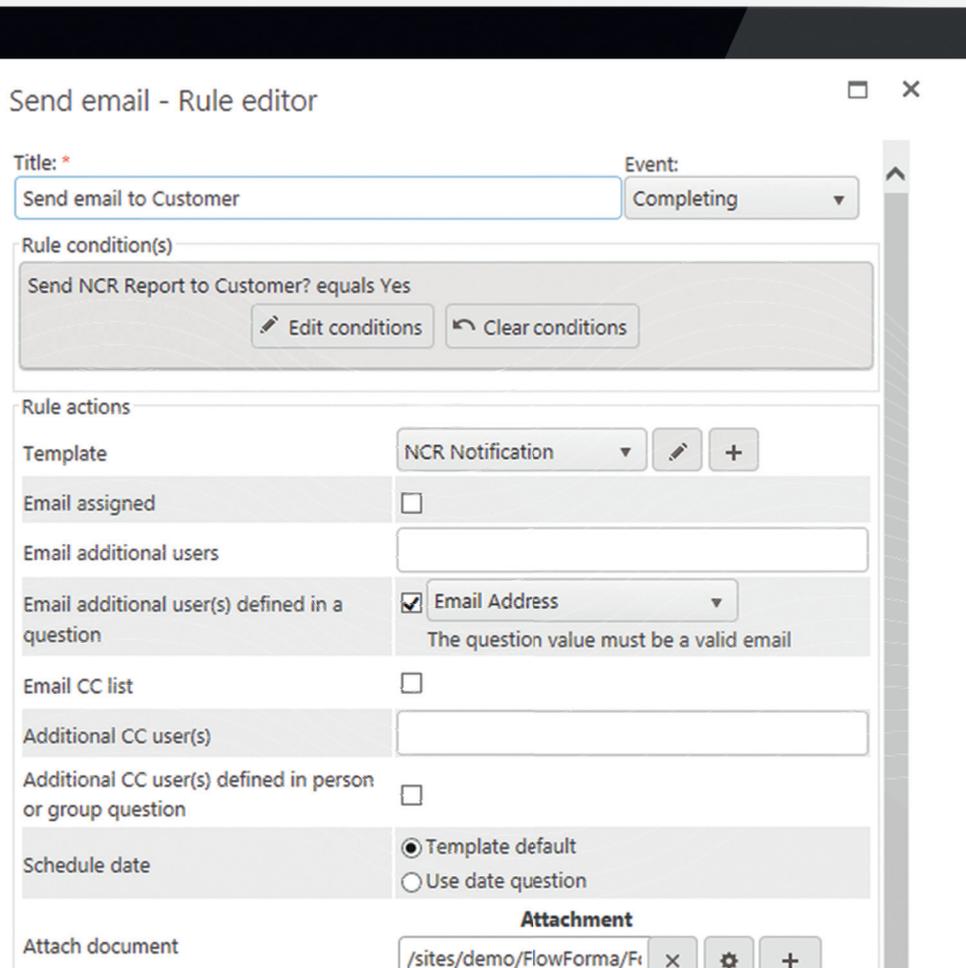
Figure 5 Business Rules: Showing condition, email business rule with populated entries
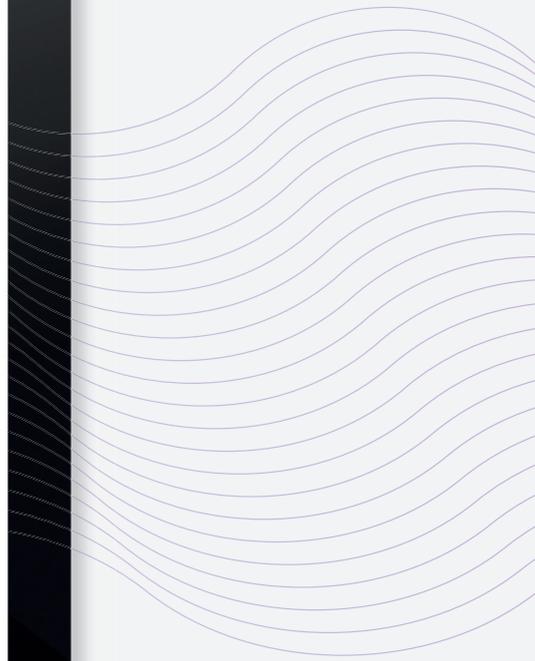
Decision making functionality allows group assessment of data and independent voting on whether to accept or reject propositions.

— The **Flow Designer** is an intuitive tool built for business consultants to construct workflows using a simple web based interface. No code is required to produce fully functional solutions that execute workflows, capture data and issue communications.

— The **Visual Flow Designer** allows Process Owners to rapidly prototype and build online processes using the intuitive drag and drop functionality. Empowered with a graphical representation of the process, it makes communication, sign off and even training much simpler.

— FlowForma BPM allows users to **generate documents** from the information captured throughout the process.

— **Activity Monitoring** allows users to identify bottlenecks in their processes, or SLAs that are not met. This is done in a visual format and can show what step each of the processes are at.

— FlowForma BPM is a cloud based tool that can be installed directly in your **O365 site or hosted in any Azure environment.** Trials are available in the O365 app store or the Azure marketplace.

— FlowForma offers the ability to create **relationships between parent and multiple child forms**, allowing Business Managers to easily view all forms related to a specific parent form and prepopulate child forms with data from the parent form.

— Our custom built data feed (OData) allows end users to consume all data captured within their forms. The data feed is compatible with any **reporting tool** that can consume an OData feed (Excel, PowerPivot, Power BI etc.).

— FlowForma BPM is also a powerful compliant tool, steps can be configured to require **e-signatures.** This will prompt the users to enter their login credentials to perform a certain action.

— Our **mobile app** was developed with two main focuses

– Quick and easy approval - the app has an easy to use interface with a section called "forms awaiting my input". This allows users to view and action any forms assigned to them.

– Offline creation of forms - the app allows the downloading of forms to local storage, this enables the users to fill in these forms when they do not have any internet connection. The forms are then synced back to the site once they are connected again.

Figure 6:
Reporting Options

FlowForma is a Microsoft Partner, with over 60 customers across Europe, South Africa and North America. The company is headquartered in Dublin with offices in London and Lithuania and is motivated by its values to innovate, evolve and achieve with employees, customers and partners.

About
FlowForma

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

FlowForma®

www.flowforma.com

Discover what our clients have
to say about using FlowForma
BPM for Microsoft Office 365®

FlowForma®

"

Workflow management used to be a nightmare. Now it's completely seamless with one integrated product FlowForma BPM."

Mark Graham, ICT Director
Beaumont Hospital

"

Even with complex processes that needed integration, FlowForma BPM proved itself to be a very powerful tool."

Dave Pritchard, Systems Analyst
Eurofound

"

FlowForma has developed a good understanding of our own vision and workflows, and found a way to successfully complement our operations without causing any discontinuities or issues on our side. They are very proactive."

Ken Kyle, IT Administrator
NSAI Inc

"

The power of FlowForma BPM's rules engine allowed the process to become completely dynamic. There was an 80% reduction in questions to admin."

Shaun Wilde, Director
Think Associates/NHS

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