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Technology & Suppliers

On the Radar: FlowForma

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FlowForma provides FlowForma Process Automation, a low-cost platform targeted at business analysts and process owners for creating and operating forms- and workflow-based applications that work hand-in-hand with Microsoft SharePoint – without the need for specialist IT knowledge.

Who?

FlowForma was founded in 2012 as a spinout from Ergo, a Microsoft systems consultancy. Ergo had built a forms and workflow tool on top of Microsoft SharePoint for a client, and saw an opportunity to commercialise the technology more widely. FlowForma is a Microsoft Gold Partner, and is headquartered in Dublin, Ireland with other offices in Boston, USA and London, UK.
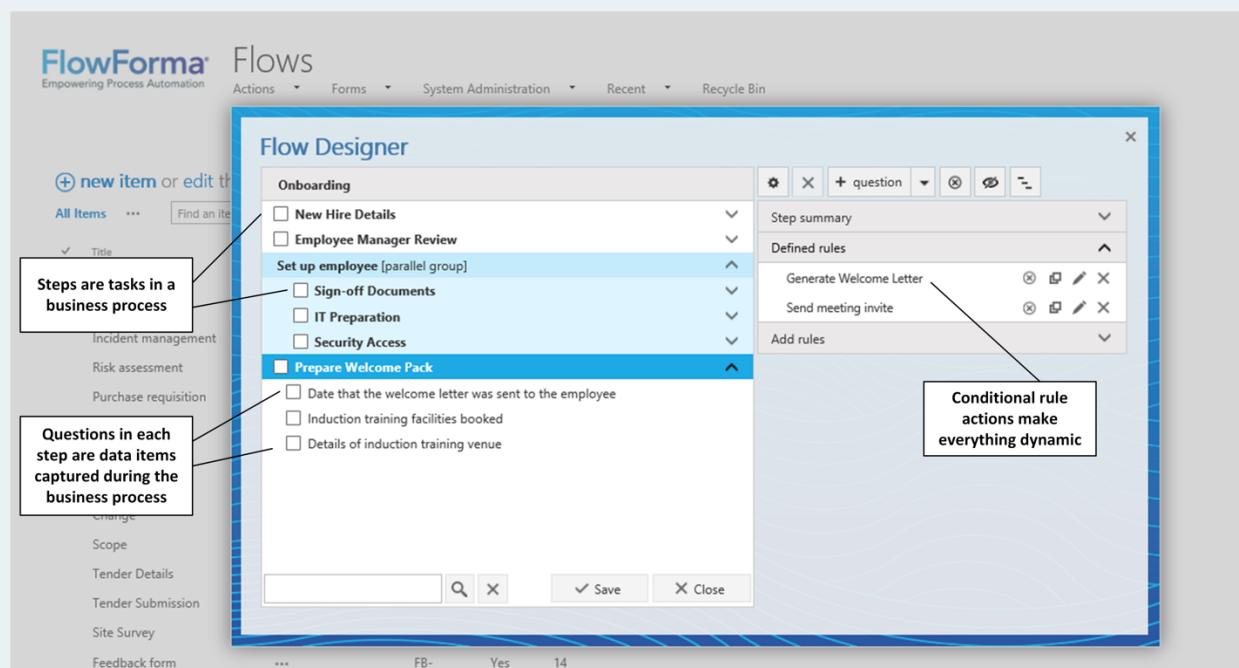
What does it do?

The FlowForma platform, FlowForma Process Automation, overall provides a core platform for creating and operating forms- and workflow-based applications that work hand-in-hand with Microsoft SharePoint. Targeted at business analysts and process owners and aiming to enable them to build applications without specialist IT knowledge, the platform itself is built on SharePoint and uses several key SharePoint features (document storage, lists, user interface framework) to provide application functionality.

FlowForma Process Automation applications are built around six core elements and capabilities:

- **Flows**. Flows are simple sequences of Steps (though it is possible, through the application of business logic defined in Rules – see below – for Steps to be skipped or repeated). A Visual Flow Designer allows you to drag-and-drop Steps onto a Flow canvas and connect them; there's also a more textual view where you can simply add new Steps to a list. You can specify that two or more steps should be executed as part of a parallel group; using Rules you can also implement branching (by skipping steps in a linear flow). Each Step includes a set of Questions; by default, these Questions are presented to users as they progress through Steps (though you can choose to hide Steps, in order to have logic execute within a Flow, but not present a user interface). You can define roles (through SharePoint Groups) and users to work on individual Steps, and it's also possible for individuals to delegate their actions to others (if, for example, they're away from work for a period of time). There's also limited support for workload balancing, through the definition of 'capacity' of individuals – the maximum number of Forms that individuals can be expected to work on at any one time. Task notifications are shown in the FlowForma app, and can also be sent by email. There's support for subprocesses (through what's called 'parent-child flow relationships'); here, a Flow instance can automatically start one or more child Flows that must complete before the parent Flow can move forward.

- **Forms**. With FlowForma Process Automation, Forms aren't really separate from Flows; the best way to think of a Form is as the user interface of a Flow. Questions in Flow Steps are all surfaced through a single Form, with the Form showing the current Form Step in its header to indicate Flow progress. The layout of the form is automatic based on the data definition; however a Visual Form Designer enables you to work from the set of Questions already specified as part of a Flow Definition, and then customise their presentation. All the usual field types and structural elements are supported, and it's also easy to apply branding to forms through the form designer and by specifying stylesheets. Questions can be configured to be mandatory/optional, read-write/read-only, and you can use Rules to define dynamic form behaviours (for example, showing or hiding Form sections depending on context). You can define data lookups that operate from SharePoint Lists; and also handle document uploads (in which case uploaded documents are saved to the associated SharePoint instance by default).

- **Rules**. To create dynamic behaviours in Forms or Flows (for example to show or hide part of a form, to calculate a value that will determine the next Flow step, and so on) you can use FlowForma Process Automation's expression language. A simple expression builder, which allows you to specify expressions that calculate and evaluate values based on Questions from your Forms and other reference data (for example data from SharePoint lists), and use these to determine actions. Rules can be implemented on Flows (triggering when they load, start or complete); on individual Flow steps (when they start or complete); or on individual Questions (when their values are changed by users).

- **Document generation**. FlowForma Process Automation includes prebuilt services, easy to invoke from Rules, that automatically generate documents (either in Microsoft Word or PDF format), based on templates that you define and data from Questions in a given Flow instance. Generated documents can be emailed, or stored in SharePoint.

- **Activity monitoring**. Administrators can view simple dashboards that show data about Flow instances that have completed on-time or been delayed; there's also a drilldown so administrators to see which instances are causing problems. You can also explore historical trends. Expected completion times for Flows and steps are easy to configure.

- **Mobile access**. An off-the-shelf generic mobile app for FlowForma Process Automation applications is available for both iOS and Android (from these platforms' respective app stores), and can be easily associated with any given FlowForma platform instance. You can choose to make a given FlowForma application to all your users, or just a select group; you can also very easily configure the app so that users can work on Forms offline. From the app, users can start Flows (by creating Forms), download Flows (so they can work on them), take action on open items, and monitor the status of open cases that they're involved in.

Figure 1   The FlowForma Process Automation Flow Designer

Source: FlowForma

Beyond the core, there are six further modules available (depending on the product edition you license – see *Who is it for?* below):

- **Engage**. With this module, forms from within your FlowForma Process Automation applications can be made available to external or anonymous users, so they can kick off and participate in workflows.

- **Connect**. With this module, you can connect your FlowForma Process Automation applications to third-party applications directly and via Microsoft Azure Logic Apps – Microsoft's Zapier-like simple integration platform-as-a-service that provides over 200 connectors to popular third-party cloud applications and services.

- **Simplify**. With this module, you can create and manage application data in an external SQL Server database (you can host the database yourself or have the FlowForma Process Automation service host it). An Entity Data Manager within the FlowForma Process Automation design environment enables you to create entity definitions from existing Question definitions within a Flow. Created entities can then be used to store details from completed Flows.

- **Collaborate**. This module allows you to aggregate activity related to a program of work or to a community (for example, around a corporate innovation initiative) – providing one place where individuals involved can access shared work queues to carry out tasks, initiate flows and view shared graphical work dashboards. There's also a discussion board feature so all permissioned users can collaborate via messaging – with the ability to tag both individual users and individual processes in messages.

- **Decision**. This module introduces support for collaborative decision-making based around voting mechanisms. With decisioning steps as part of Flows, groups of participants can contribute individually to decisions (by voting 'yes/no', or rating a decision on one or more numerical dimensions), with the aggregate voting values presented to all participants in the next step. The aggregate result can then be passed through the Flow and used to control downstream actions and outcomes.

- **Governance**. With this module, administrators gain the ability to simply set up and manage multiple deployment environments (for example, supporting development, test, staging and production). There's a user-facing console that allows users to request new environments to be provisioned, and automated workflows that help administrators manage those requests (for example, passing requests to IT for authorisation). There's also a dashboard that provides information about environment usage, supporting multi-department cross-charging schemes.

In addition to FlowForma Process Automation, the company also offers customers what it calls the SureStart Program – a packaged implementation service designed to help new customers get started with the platform quickly with the implementation of an initial business process application within a two-month period.

There's also a SureStart Superior option, which additionally includes training for up to eight of your people, project scoping calls for up to four additional projects, and a facilitated four-day workshop in which your eight training attendees can tackle the design and implementation of these four identified projects. Training courses are also available separately.

In-person and online training (via the web-based FlowForma Academy) are also available and priced per user.

Who is it for?

FlowForma Process Automation is designed for organisations wanting to quickly deliver relatively straightforward digital process automation applications, within the context of a Microsoft platform environment (FlowForma's proposition works particularly well if you're already using some combination of SharePoint, Office365 and Azure).

FlowForma Process Automation is very deliberately designed for and pitched at business analysts rather than application development specialists. Everything about the design experience and tools is about delivering working workflow automations quickly.

FlowForma Process Automation is offered via online monthly subscription. There's a free 30-day trial available, which allows you to develop full-featured applications and deploy them for use by up to 250 users. Beyond that, there are three editions, each offering different levels of capability and priced based on named users:

- The **Starter Edition** provides all the core features of the FlowForma platform. Current pricing is £850 per month, allowing for the development of up to five process flows, unlimited document generation, and application delivery for use by up to 250 users.

- The **Corporate Edition** adds support for more sophisticated form and data designs, the FlowForma Decision module, connectors to external systems (via the Connect module), a dedicated mobile app, and more. The FlowForma Engage module is also available as a separately priced add-on. Current pricing starts at £1,750 per month, allowing for the development of unlimited process flows, and application delivery for use by 250 users (adding more users incurs a higher cost).

- The **Enterprise Edition** adds all Corporate Edition features, together with advanced reporting, the FlowForma Collaborate, Simplify and Governance modules, and more. Current pricing starts at £2,750 per month, and as with the Corporate Edition allows for the development of unlimited process flows, and application delivery for use by 250 users (adding more users incurs a higher cost).

More pricing information is available at https://www.flowforma.com/pricing.

FlowForma is currently seeing particular success in the energy, engineering, professional services, life sciences, and FMCG sectors but the product is equally applicable in any industry scenario.

Why is it interesting?

FlowForma Process Automation is particularly interesting for four reasons.

First, the speed with which organisations can implement process applications. One FlowForma customer implemented and released 64 applications within 12 months; another implemented and released 30 applications over the course of a summer with four business interns doing the implementation work.

Second, the ability for you to create applications that can involve external or anonymous users – meaning that FlowForma applications can be easily and cost-effectively built and deployed to improve business processes with interactions with customers, partners and suppliers at their heart.

Third, the inbuilt support for 'collaborative decision management' as part of processes, in which groups of participants can contribute individually to decisions (by voting 'yes/no', or rating a decision on one or more numerical dimensions), with the aggregate voting values presented to all participants.

Last but not least, the low cost of the platform. Depending on your precise needs and interests, pricing works out in the range of GBP 3-12 per-user-per-month.

How established is it?

FlowForma already has over 100 customers, with over 150,000 users of FlowForma Process Automation applications in client organisations; it's recorded year-on-year growth in excess of 50% for each of the past three years. The company currently has around 30 employees and is privately-held. It received an undisclosed amount of venture funding in 2016 from Enterprise Ireland, an agency of the Irish government. Former founder and CEO of Singularity (a specialist BPM technology vendor, bought by Kofax) joined FlowForma as Chairperson in March 2016.

How open is it?

In the Standard Edition, FlowForma Process Automation provides connectors to Microsoft SharePoint and SQL Server; the Corporate and Enterprise Editions add connectivity to Microsoft Dynamics 365, HubSpot, and Office 0365 Active Directory (via the Graph API).

FlowForma also allows customers to develop their own question types and business rules via a published, documented API. Via this method customers could, for example, implement a custom question type that displayed a dynamic map inside a form, or build a business rule that queried SAP to retrieve data for a specified client.

FlowForma Process Automation doesn't support any standard business process notations like BPMN.

Who does it partner with?

FlowForma focuses on direct selling of their self-service tool to pass benefits directly onto customers, with 24/7 support services available to their global customer base.

As well as partnering with Microsoft on technology, FlowForma works with a small but growing set of implementation partners across Europe, North America and beyond – including Appetite for Business, BlueBrain, Cloud2, Datalynx, The Web Consultants, Ergo (from which FlowForma was originally spun out), Ricoh Ireland, Hubbub and Risual.

Are there areas for improvement?

Particularly given FlowForma's current focus on providing facilities to support customers as they implement 10, 20, 50 or more applications, there are two particular areas where the platform would benefit from further development.

Firstly, although the Governance module provides facilities to help manage the roll-out of applications, the addition of check-in/out or impact analysis features would all help teams of users reliably work concurrently on programmes of work over time. Secondly, although the Simplify module provides the ability to drive data model reuse between and across FlowForma applications, there are no platform features that would help support reuse of other kinds of application artefacts (particularly, common user interface elements with associated configurations and rules).

What's next?

FlowForma has a number of development priorities, including adding more functionality to its Governance module; enriched integration options; making it easier to operate applications that engage external users; taking advantage of machine learning opportunities in the platform; and updating its mobile app.

Should I consider it?

If you're looking for a low-cost platform that teams can use to quickly build forms-and-workflow applications (for example, to reduce reliance on sending spreadsheets back-and-forth over email) then FlowForma Process Automation is definitely worthy of consideration. If your organisation has an existing investment in SharePoint Online and Office 365, FlowForma's high level of interoperation with these technologies makes it an obvious choice.