SYNERGY
workflow design services
CONTENTS

INTRODUCTION..........................................................3
WORKFLOW AUTOMATION:
PERCEPTION VS. REALITY..............................................4
DESIGN, OWNERSHIP AND GOVERNANCE..............7
QUALITY CONTROL..................................................8
PREPARING YOUR USERS........................................8
TOOLS OF THE TRADE..............................................9
WHERE TO START...................................................13
CUSTOMERS..........................................................14
Any repeatable process within your business can be fraught with human error, which can bring inefficiency to your organization. Doubtless, every manager has wanted processes that are manual and regularly repeated by their workforce to be more automated.

The need for automation in a modern, fast-paced business has never been greater.

SharePoint is a powerful, collaborative tool which can help you automate your business processes, using a feature called workflow.

The advantages of workflow automation are easy to see:

- Minimize human error
- More efficient use of your resources
- Get the right data from the right places to the right people
- Enforcement of organizational policies
- Meeting compliance requirements
- Gathering of data from disparate sources for business intelligence purposes
- Reporting and insight into your business processes

Automated workflow can drive business processes in real-time, rather than relying on manual tasks to start the next step.
WORKFLOW AUTOMATION: PERCEPTION VS. REALITY

SharePoint provides business owners the ability to consider workflow automation in ways that were not possible or cost effective in the past.

Common Workflow Examples

- Time off requests
- Expense reimbursement claims
- Travel authorization requests
- Multi-stage document approvals
- Publishing content approvals
- New employee onboarding process
- New user provisioning requests
- Facilities requests
- Budget approval requests
- Project issue escalations

While the ideas for where workflow automation can be advantageous are simple to visualize, they can be difficult to execute in practice.

With this in mind, we recommend easing into your workflow automation practices with a workflow that automates a process many users require. This will garner buy in and help with adaptation of future workflow automation.
**Perception**

Using an example of automating your employee time off request process, it is typically perceived that the workflow around such a “simple” process will run in a linear fashion:

- An employee will fill out a form to request time off.
- The manager will receive the details from the submitted form and approve the request.
- Human Resources will then receive the manager’s approval.
- The employee gets the time they requested off.

![Figure 1: Time off request – perceived workflow.](image-url)
Reality

In reality, the “ideal” workflow does not exist:

- What happens if someone else in the department has off on the same day?
- What happens if the employee needs to change the dates or times they have requested?
- Does the employee have sufficient time off to accommodate their request?
- Who gets notified if the manager is away?

What appears to be a “simple”, linear workflow process, quickly becomes more complex and hence, more difficult to implement in practice.

▲ Figure 2: Time off request - “real world” workflow

This is workflow in the real world. Thankfully, the SharePoint toolset is flexible enough to accommodate complex workflow processes.

It is the design of these processes, prior to implementation, that is the key to success.
DESIGN, OWNERSHIP AND GOVERNANCE

A key aspect to workflow design, and one that is all too often overlooked, is ownership of the business process. While managers and business owners can readily identify processes that could or should be automated, determining who should own the process can be a very difficult challenge to overcome.

It is far easier to assume that all the individuals responsible for the business process must take joint ownership of the workflow tasks.

Easier yes – Correct no.

Every workflow should have a designated ‘Business Owner’ who is responsible for the overall workflow process and has the skill and training to manage the workflow.

This is a critical key to success.

This business owner will be the individual who signs off on the functional specification – another all too often overlooked best practice that will help to ensure the success of your business process automation vision.

The functional specification is the document that will lay out the purpose of the workflow – why it exists, a flow of the workflow process itself and approval by the business owner.

▲ Figure 3: Functional Specification
QUALITY CONTROL

As the saying goes, “you only get one chance to make a good first impression”. Defining the business need for your workflow, assigning the business owner, approving the functional specification and then developing the solution, are all vital elements of the process but you’re not done yet.

Testing is a vital element and is required once the workflow is in place, to confirm it meets the requirements and that all possible outcomes (relating to the workflow) have been accounted for.

- What happens when one branch or the other of a workflow is selected?
- Does it communicate the current steps effectively?
- Is the end user experience a good one?
- Can it be modified to adapt to changing business requirements?

Testing should involve the very people who will be impacted by the new workflow. The more people you can efficiently involve in the testing process, the more success you are likely to achieve.

Once testing is complete, you are almost ready to launch...

PREPARING YOUR USERS

Ensuring that everyone affected by the workflow has an understanding of what to do or how to respond before the new automated business process goes live, is also a vital part of the move from your old processes to your new, more automated systems.

Once you have communicated you can set a date and go live.
TOOLS OF THE TRADE

Our consultants will work with you to identify the right tools for the job. SharePoint workflows can be created in a number of different ways and each tool has certain advantages and limitations, so, selecting the best tool at the outset will better ensure the success of your workflow implementation project.

Out of the box

Out of the box workflows, such as a document approval or publishing process, can be built and customized from within your web browser.

Pros:
- Easy to configure
- No additional licensing costs
- Pros: 

Cons:
- Very limited customization
- Limited template choices
- Cons:

Figure 4: Browser Workflow Configuration
Office ‘desktop client’ Tools

Slightly more extensive workflows may require the use of a specialized tool such as SharePoint Designer. In addition to providing visual customization, SharePoint Designer provides a designer or developer with the tools to create custom workflows.

![SharePoint Designer Workflow](https://thabaysynergyonline.com - SharePoint Designer)

**Figure 5: SharePoint Designer Workflow**

<table>
<thead>
<tr>
<th>Pros:</th>
<th>Cons:</th>
</tr>
</thead>
<tbody>
<tr>
<td>No code design</td>
<td>Three State Limitation</td>
</tr>
<tr>
<td>Rules and conditions can be added</td>
<td>Sequential workflows only, cannot be based on state</td>
</tr>
<tr>
<td>Can be saved as a reusable workflow</td>
<td>Cannot create documents or sites from a workflow</td>
</tr>
<tr>
<td>No additional licensing costs</td>
<td>Cannot update other data sources such as list items</td>
</tr>
</tbody>
</table>
Developer Tools

SharePoint Designer is constrained by limitations that may require the skills of a .NET developer experienced in coding in SharePoint using Visual Studio. Our staff of trained developers can provide you with the expertise needed.

▲ Figure 6: Visual Studio Workflow

Pros:
- Flexible design options
- Integration with LOB systems
- Can create/update items in SharePoint or LOB systems
- Can be based on state, no linear restrictions

Cons:
- Requires experienced .NET developer and understanding of SharePoint Object Models
- Requires specialized skills
- Requires Visual Studio licensing
Third Party Tools
Whether your requirements are simple or complex, you may need to have the ease and flexibility of a third party solution such as Nintex Workflow 2013. Nintex provides you with a no-code, visual workflow design, making the development of custom workflows accessible for a greater range of staff. The flexibility of these solutions enables organizations to create, reuse, and modify workflows to accommodate dynamic business requirements.

Pros:
- Flexible Licensing Options
- No Code workflow design (simple to complex)
- Minimal Training Required
- Multi stage workflows and ‘voting’ controls built in.
- Lazy approval enables you to approve workflows via email.
- Design workflows within SharePoint browser
- On screen graphical representation of workflow process

Cons:
- Additional licensing requirements separate to SharePoint licensing investment
- Some training required
WHERE TO START

Automating your business processes can bring significant efficiencies to your business.

The process itself is more complex than you may assume at the outset but don’t let this cloud the business improvements that you can achieve with the successful move to workflow automation.

Synergy has extensive workflow design consulting experience. We can assist you through the process of developing your custom workflows from inception through go live and beyond.

We will work with you to help you understand your business process requirements, bringing our experience to bear to achieve the best workflow possible.

Our consultants will help you define the business need, identify requirements you may not have thought of, and discuss the tools available to get the job done right.

We can also provide custom training solutions to get internal staff up to speed on the process of developing workflows, using out of the box solutions or third party products.

We know the right questions to ask, and will work closely with business owners to develop and refine the process. We will guide you through the pitfalls of implementation and assist you with testing your workflows pre-launch.

We can then help train your staff on maintaining the solutions and developing new workflows in the future.

Contact us today to discuss your SharePoint workflow requirements at www.synergyonline.com
CUSTOMERS
SharePoint Workflow customers include:

- Novartis Vaccines
- MEC: Active Engagement
- Foxwoods Resort & Casino
- Intrepid Sea Air & Space Museum
- GroupM
- Tracy Locke
- Maxus
- MediaCom
- NFER
- Mindshare
- Oxley