Cloud Productivity
& Collaboration

Is SharePoint Workflow
Right for Me?

HOW DO I KNOW AND WHAT DO I DO IF SHAREPOINT WORKFLOW ISN'T ENOUGH?

The Scenario: Your business is clamoring for workflow. You have SharePoint and you want to make the most of that investment; therefore, we should use workflow in SharePoint, right? That would drive the idea of using SharePoint as a central portal, as a hub and spoke design that continually brings users back to SharePoint.

After a decade of working with SharePoint, I also like the idea of getting the most out of any SharePoint investment, but I often find myself trying to educate businesses about when it is appropriate to use SharePoint's workflow engine and when it is time to consider an enhancement from a third party. I hope this article helps to shed some light on the subject.

WHEN SHAREPOINT IS THE RIGHT TOOL FOR WORKFLOWS

If your work process is straightforward with a sequential set of tasks, then SharePoint should be a great fit. When a sequential process is related to a common set of Microsoft Office documents or basic list content, SharePoint is even better because it is particularly suitable for managing collaboration, notifications, and keeping track of status changes.

WHEN SHAREPOINT ISN'T THE RIGHT FIT FOR WORKFLOWS

Unfortunately, beyond the basic set of workflows, SharePoint's workflow engine is not a robust tool. You quickly could find yourself mired in Visual Studio developing custom code to implement a more complex workflow that is recursive or has long running flow patterns. Visual Studio custom code is time-consuming (and expensive) to create and maintain. If you have any integrations to other line-of-business (LOB) systems, a large volume of workflows, or the need for escalations, delegations, system interventions, alternative flows, or voting, be warned that using out-of-the-box SharePoint workflows is not a good idea.

Native SharePoint and SharePoint Designer workflows only solve a small piece of the workflow pie.

It's tempting to try to use SharePoint's native functionality, especially when you've had success with solving the low-hanging workflow fruit with out-of-the-box SharePoint workflow, but...

When it comes to building workflows in SharePoint, try to live by this mantra: "configure only, don't code"
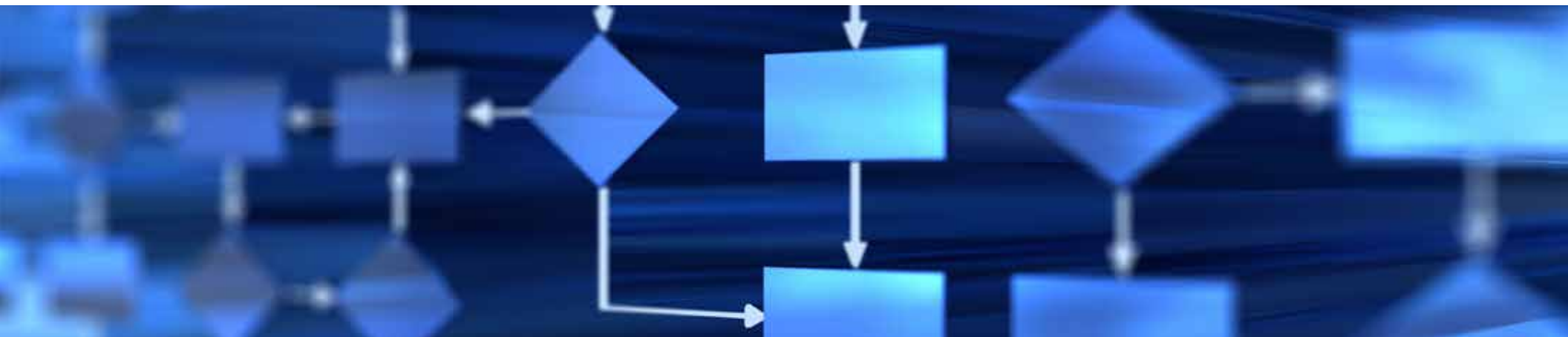
A Word About InfoPath?

Microsoft hasn't killed InfoPath or named a successor to it, but they have not updated it in line with their other product updates for two cycles now. We still support clients who've implemented InfoPath, but we do not implement InfoPath forms due to limitations with the solution, performance issues, and because both Microsoft's failure to update and past announcements signal that InfoPath is at the end of its life.

BPM (BUSINESS PROCESS MANAGEMENT)

BPM is a broad category of products and platforms as a service (PaaS) offerings that feature a graphical, model-driven authoring environment and an integrated execution engine for accelerating the development of process-centric applications. Wow, that's a mouthful.

Basically, there are a slew of vendors who've developed tools that augment SharePoint's workflow capabilities. These augmentations can work with SharePoint's workflow engine or simply interact with SharePoint via integration. Most of these third-party products aim to make it easier for less technically savvy workers to build, maintain, and edit workflows that integrate with other LOB systems.

BPM platforms can shorten the amount of time before a workflow is ready for prime-time. To take it a step further, as capabilities like mobile device support, cloud-based process design and service integration become more mature, these platforms are being used to replace traditional, time and resource-intensive application development platforms as a simplified way to build process-intensive applications.

Gartner research backs our own anecdotal experience that two of the three common BPM categories are attracting the most interest from buyers:

- iBPMS, using intelligence to reduce the time from insight to action
- Basic BPM, addressing more opportunistic process-centric application development needs.

The two most common workflow engines we help deploy are Nintex and K2 blackpearl.

NINTEX

Nintex is a workflow engine intended to shorten development time and features graphical modeling, a metadata repository, and workflow. It is built on top of SharePoint's workflow engine and makes sense for an organization looking to make the most of the SharePoint workflow capabilities.

It reduces the need for specialized technical skills to create and manage workflows, provides visibility into the process by business users, and depicts the workflow graphically. Similar to when you should use SharePoint workflow, Nintex is a good fit when the process you want to automate is highly structured, requires only the most basic of analytics, uses only simple business rules, and doesn't need to integrate with any systems outside of SharePoint or O365.

Usage Scenarios

Nintex is a process-centric model driven composition.

Most of these third-party products aim to make it easier for less technically savvy workers to build, maintain, and edit workflows.

OAC – Opportunistic Application Composition

This method uses the BPM platform to quickly compose an application. The process may include the orchestration of IT services that have preconfigured adapters, but typically orchestration focuses on human-centric tasks. Workflow complexity is low and has limited dynamic behavior (typically isolated to simple decisions that only examine process instance data) or is unstructured, collaborative, and ad hoc simple task management.

Summary

Nintex is one of the easiest solutions for your business users to learn and use themselves. This makes it a powerful tool for the technology team to empower business users to automate simple processes and edit as they need with minimal support from the IT team or external contractors. The downside is that Nintex architecture suffers from the same shortcomings as the SharePoint workflow, and upgrades to SharePoint could break or adversely impact your workflows. If you're using SharePoint on premises (especially if you're on SP 2010 or older), Nintex will consume additional resources. This could mean adding additional Web Front End (WFE) servers to your farm, and since Nintex licenses by WFE, it's going to cost you. Lastly, Nintex doesn't handle highly complex, long-running processes, nor anything with hundreds of steps. Keep it simple with Nintex and you'll be just fine.

K2

K2 is an Intelligent Business Process Management Suite, iBPMS, which is used to shorten development time, as well as to compress the number of review cycles for process improvements. It allows business users to collaborate with the IT department across all phases of the process life cycle, and features dynamic + ad hoc types of non-routine work with analysis of in process performance and external data. It is a .NET-based solution that features easy integration with other Microsoft technologies as well as service-enabled enterprise systems.

K2 blackpearl allows people to build and run business applications, including forms, workflow, data analysis, and reporting. K2 natively integrates with SharePoint, Active Directory, Exchange, Office 365, Dynamics CRM, SQL Server, Oracle, SAP, Salesforce, and more. It uses visual tools to build reusable components that utilize LOB and web-based data. K2's SmartObjects provide a single view of business entities and are easily configured to connect to nearly any system within an enterprise or on the web.

Usage Scenarios

K2 is both an application-centric and process-centric model driven composition.

Workflow complexity is low and has limited dynamic behavior.

OAC – Opportunistic Application Composition

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CPI – Continuous Process Improvement

In this scenario, the platform is used to measure the business outcome of an existing process and improve the results of the outcome through iterative improvements to the process.

IBO – Intelligent Business Operations.

IBO addresses the challenge of creating smarter, more agile and more innovative processes, which enable organizations to outperform the status quo and exploit new business opportunities. Implementing processes that use operational intelligence results in a better decision making and improved knowledge worker collaboration.

DPs – Digitalized Process

This is a type of intelligent business operations that manages the interaction of people, businesses, and things in digital marketing or digital business. Digitalized processes are designed for change so that these interactions (that is, the work) can be adapted in real time to capitalize on business moments.

CM – Case Management

These solutions treat a case as the primary aspect of work to be managed for a successful outcome. Cases do not progress serially or predictably. There are multiple dependent workflows and associated object types, such as data, content, people, machines, and policies. These interdependent relationships are the key architectural challenge. Case Management as a process style is now being applied in many sectors beyond government, legal, and insurance, including healthcare, banking, higher education, and retail. Some solution providers offer cross-industry case management frameworks, while others offer industry and domain specific ones. CM solutions address four different use cases that use varying degrees of structured and unstructured processes as well as structured and unstructured data.

Digitalized processes are designed for change so that these interactions (that is, the work) can be adapted in real time to capitalize on business moments.

BT - Business Transformation

In this scenario, senior business executives want to make a game changing play and rethink one or more business processes. We see this scenario in organizations worldwide that are strained by significant industry changes brought about by regulatory changes and the global economic recession. This is, in many ways, a culmination of the previous use cases but is a significant departure from the current approach to business operations.

Summary

K2 blackpearl has been around for a long time and, as far as I know, is one of the only Microsoft partners with a workflow tool that Microsoft actually uses internally. It is capable of tackling your most challenging workflow and business transformation needs. Though it integrates with SharePoint, this is a standalone engine. They do offer their K2 Appit model where, because none of the products are built on SharePoint's workflow engine, you will not be affected by Microsoft's upgrades to SharePoint or any future deprecation. It's an expensive tool, but they've rolled out a much more flexible pricing model that enables organizations to get started without incurring the full cost up front.

In Conclusion

You should use SharePoint workflow for managing simple tasks related to content that lives in the application itself.

If you have to code, consider a BPM solution that is the right fit for your entire organization and you have the skillset to support. It's worth noting that these BPM platform solutions are not the cheapest, but they will often be exactly what you need.

Before you make the final decision about which workflow to use, make sure to look across the organization to see what processes you have and evaluate the future needs of those teams instead of focusing on a single business unit or business process.

Don't let budget be the deciding factor in your approach, because the cheapest solution can ultimately end up losing you more money in the long run than you would have spent doing it the right way the first time.

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Carol has close to a decade of experience leveraging SharePoint to create enterprise content management, collaboration, and business process automation solutions that meet business needs. She has helped clients address challenges related to contract and records management, contract and AFE approval workflow, lease digitization, and offshore extranets.

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