BUSINESS PROCESS AUTOMATION RFI

Choosing the right solution to automate your business processes or meet specific business process needs isn't easy. While a broad array of functionality is available, from BPM suites to custom applications that meet specific business needs, different solutions have differing capabilities and strengths across a variety of categories. In the following RFI, we've honed in on eight key areas for business process automation success to help you evaluate the quality of the platforms you are considering – and to ensure that the system you choose is agile and flexible enough to meet your business needs.

NO.	FEATURE	RESPONSE	BUSINESS REASON	COMMENTS
1 WORKFLOW TOOLS AND FEATURES				CAPABILITIES PROVIDED BY YOUR VENDOR (Check)
1-1	What process design toolsets does the solution provide?	Your solution should provide audience-focused design canvases (based on technical ability) that are used to build processes. These designers should be graphical, drag-and-drop, wizard-driven experiences that support an agile dev approach by allowing you to rapidly build applications to automate your most pressing business needs, and then do more later as other needs come up.	Audience-focused design canvases with visual tools allow business users, as well as technical users, to build applications in a familiar environment. This reduces the learning curve of adjusting to a new system, while no- to low-code visual tools significantly speed up the app development process.	
1-2	Can a workflows built for one process be reused across other processes?	Virtually all components used to automate a process, including rules, forms, workflows and data integration points, should be reusable across other applications.	Reusable components drastically speed up the building process, making each app faster to build than the previous one. This is especially true with reusable data integration. For comparison, integration points in Web services are not reusable and must be rebuilt every time a connection to a third-party system is needed. Reusable forms, workflows and rules will also significantly speed up the development time, allowing you to build processes in minutes or hours instead of weeks or months.	
1-3	Can the solution's workflows incorporate data from third-party systems?	Your solution should be able to configure data access to multiple third-party cloud and on-premises systems, without code, including Microsoft SharePoint, Microsoft Dynamics CRM, Microsoft SQL Server, SAP, Salesforce, Oracle and Web services.	Business processes are often not confined to one department or system. Many processes, like quote to cash or case management, involve multiple systems and departments. Out-of-box integration with third-party systems allows you to create workflows that bridge these systems, whether cloud or on premises.	
1-4	Can the solution's workflows integrate with file-sharing services	Ideally, your solution should integrate with file-sharing services, such as Box, Dropbox and Google Drive.	With file-sharing systems becoming more and more popular across organizations, integration with these services, in addition to line-of-business (LOB) systems, will provide you with easy access to information across your organization.	
1-5	Can the solution support a variety of workflow step types (steps that include both system and user tasks)?	Your solution's workflows should have the ability to contain any combination of user steps and system steps. User steps include the ability to assign a task to one or more people. The actions a user can take for the step should be configurable. System steps can include any number of actions, such as reading or writing data to a line-of-business system, copying a document to a document management system, or evaluating a business rule, etc. Both user and system activities should have drill down properties, such as expected duration, exception handling or the ability to call into other processes (subprocesses).	Many LOB systems have workflow capabilities, but these capabilities typically work best for short-lived, data-centric workflows, not workflows that involve both systems and users, such as a process with complex task assignments. Most LOB system workflow capabilities also do not have out-of-box integration with other systems and require custom coding if integration is required. Enterprise workflows that scale systems and can incorporate user interactions will enable you to automate business processes involving systems and users that may be time intensive or causing bottlenecks.	

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1-6	Does the solution support loop, switch and parallel actions?	Your solution should be capable of a rich workflow process design, which includes the ability to execute looping, switch and/or parallel activities.	Most LOB systems, including SharePoint do not provide advanced workflow capabilities, such as rework options (the ability to loop a workflow back to a previous step if a task has not been completed satisfactorily) or simultaneous approver capabilities (the ability to send a task to more than one person at the same time for approval). If your system provides these abilities out of the box, it can save your organization the cost and time of having developers build out this functionality by hand.	
1-7	What features does the solution provide that boost user adoption of workflows?	Users should be able to receive email status updates and notifications when an action is required, and be able to complete workflow steps in their email client, so they can approve or review work from their phone or a tablet while on the go. The solution you choose should also provide an out-of-office feature that allows users to delegate their tasks to another user if they are going to be away from the office.	Making it possible for end users to complete workflow steps from their email significantly boosts user adoption by allowing users to complete work without having to learn the nuances of a new system. Escalation capabilities also increase user adoption by alerting managers when something is wrong, so managers don't have to constantly check up on processes. This makes their job easier and gives them more time to focus on other projects.	
1-8	Are the solution's workflows supported on any mobile platforms?	Your solution should support the major mobile platform, giving users access to workflow tasks from their phone or tablet. They should be able to take action, delegate, check in on a process status, or find the information they need to make decisions.	Clients and employees increasingly expect the ability to access and complete work on tablets or mobile devices. If mobile solutions need to be developed by hand, it can take months to develop a single application. With a responsive design, you an access all applications from your device of choice, whether tablet, phone or desktop computer.	
1-9	Does the solution provide any task management features to help you manage workflows?	Your solution should offer a centralized task management dashboard, with the ability to view all the workflows you are associated with in one interface.	Centralized task management dashboards can make life easier for managers. Managing multiple processes are tasks is challenging enough without having to go to multiple locations to view the status of a task or process. Having everything visible on one screen will increase process visibility and help managers keep processes running smoothly.	
1-10	Does the solution come with workflow versioning capabilities?	Your solution should provide full versioning capabilities that allow you to roll back to previous workflow versions at any time.	It's important to be able to easily roll back changes that may be causing a problem with your application. If this feature is unavailable or difficult to take advantage of, it can lead to significant downtime while the problem is being resolved.	

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2 FORMS				
2-1	Does the solution come with a form designer?	Your solution should come with its own form technology or be able to integrate with your preferred form technology. If your system does come with a form technology, visual form-design tools with drag-and-drop functionality will make it possible for both technical and business users to quickly build forms without code.	Most organizations store information on some type of online form, whether it is InfoPath, Lotus Notes or some other form technology. With both InfoPath and Lotus Notes too old and inflexible to provide the intelligent, integrated form experience that many organization need, a form technology that allows organizations to quickly build modern forms without code is invaluable.	
2-2	Are your forms customizable?	Your forms should be able to be customized without code and come with a browser-based design canvas, so they can easily be incorporated into any browser-based system.	Most form technologies require code any time a custom form is needed, so the ability to quickly create custom forms with little to no code makes it possible for less technical resources to build forms, allowing more technical resources to focus on mission-critical projects.	
2-3	Can forms run independently from the workflow or are they tightly coupled?	Your forms should not be tightly coupled to workflows. This way, they can be used either as standalone forms or tied to one or more workflows and reused across multiple applications as needed.	Information within an organization is often used for multiple purposes rather than being used once and discarded. Forms that are tightly coupled to workflows and unable to be reused across multiple applications means that even if you are dealing with the same information, separate forms needs to be built for each use-case scenario. The ability to simply reuse forms eliminates this repetition and can save organizations a lot of time.	
2-4	Can sections of forms be shared or reused?	The various sections that make up your form should not be tightly coupled together, allowing you to reuse sections of the form, as necessary, across multiple applications.	While information within an organization is often reused for multiple purposes, this might mean only a section on a form, such as customer information, rather than the entire form. The ability to reuse sections of a form will allow you to save time by creating a library of form parts that can easily be assembled into a complete form and reused across multiple applications.	
2-5	Do your forms integrate with workflows?	You should be able to your forms to workflows, so information that each automated process requires can automatically be delivered to the right people or stored in the right system of record.	Business processes require some sort of information to be delivered across users and systems. To fully automate a process, your forms need to tie to your workflows so that information is delivered to the right people, at the right time to take some sort of action, whether it is reviewing, approving or completing a task.	
2-6	Do your forms integrate with third-party systems?	Your forms should allow you to work with data from disparate third-party cloud and on-premises systems, without code, including Microsoft SharePoint, Microsoft Dynamics CRM, Microsoft SQL Server, SAP, Salesforce, Oracle and Web services. They should also easily integrate with file-sharing services, like Box, Dropbox and Google Drive.	Many organizations store information in multiple systems. This can make it difficult to access and find critical information in a timely manner. Third-party system integration allows you to bring together information from multiple systems through a centralized access point. This way you can easily incorporate important information into your forms, no matter where it lives.	

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2-7	Which markup language are your forms built on?	Your forms should be built on HTML 5 and come with modern browser support.	HTML 5 is the Web standard for today and for the next generation. It is already supported by browsers across the full range of device types.	
2-8	Are your forms built with a thin client or thick client design?	Your forms should be built with a thin-client, browser-based design.	A thin-client, browser-based design makes your designers easily assessable to multiple users.	
2-9	Can your forms be accessed from mobile devices?	Your forms should be built in a responsive design with full-featured support for all the major mobile platforms.	Clients and employees alike expect information to be available from their phone or tablet. A responsive design will allow your forms to be accessed from any device, whether phone, tablet or desktop.	
2-10	How can the look and feel of forms be customized?	Your forms should support CSS-based theming but also provide out-of-the-box themes that provide a good range of common styling, as well as custom themes that can be implemented without code.	Customizing the look and feel of a form often becomes a coding exercise, requiring technical resources and more time than organizations can afford to spare. Forms with out-of-box themes that can be implemented by business users allow technical users to focus on more critical projects.	
2-11	Do your forms have offline capabilities?	Your forms should allow you to input information, even when offline, with the ability to automatically sync with back-end systems once Internet connectivity is restored.	In some industries, such as manufacturing, employees may often work from remote locations where Internet connectivity is not available. Offline form capabilities will allow employees to easily get work done whether they are offline or online.	
2-12	Can the forms be saved out as templates?	Your forms should be able to be turned into templates, so that standardized forms can be created for use across an organization.	Every organization has forms, such as approvals or requests, which will need to be reused again and again. The ability to create templates will allow you to standardize these forms across your organization.	
2-13	Do you support complex form validation and general form rules authoring?			

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3 INTEGRATION AND DATA SECURITY				
3-1	Can the solution integrate with third-party systems?	The solution should be able to integrate with external LOB systems, like Microsoft SharePoint, Microsoft Exchange, Microsoft SQL Server, Microsoft Dynamics CRM, Oracle, SAP, Salesforce and Web services.	Out-of-box integration with external LOB systems will allow you to automate processes that involve multiple types of systems, such as customer relationship management, enterprise resource planning, enterprise content management and even social.	
3-2	Can data integration points be reused across multiple processes?	Once a data integration point is created, it should become a reusable asset that can be accessed across processes, forms and reports, and is accessible via APIs, services and Representational State Transfer for integration with products, such as Microsoft Visio and Microsoft PowerPivot for Excel.	Reusable integration points can be a huge timesaver because you won't have to build new connections every time an application is built that requires integration with a particular system.	
3-3	What security measures are in place to keep the data secure?	The solution should integrate with external LOB data in a way that is secure, such as providing a conduit to where the data is stored rather than storing the data directly in an application. Ideally, applications that you build would adopt the security parameters of the underlying systems of record so that data adheres to the company security measures already in place.	Data security is one of the most important things to think about when considering any new technology. Ensuring you're your business process automation technologies will keep your data secure before buying can save a lot of headaches further down the road.	
3-4	Can the data be accessed in real time or is the data aged?	Data should be able to be accessed in real time from where it is stored in its system of record.	The ability to access data in real time will ensure that the data being sent out or used in reports is always the latest.	
3-5	What levels of security does the system provide?	You should be able to set security at a higher level, such as for an entire application, but should also be able to secure individual actions within a workflow as well.	This kind of flexibility will enable you to keep data secure, even from individuals that are involved in other parts of the workflow but do not have permission to view specific reports or sets of data.	
3-6	Does the solution allow non-technical users to work with LOB data?	Your solution should be simple enough for non-technical as well as technical users to configure the integration points and bring together data from disparate systems.	Low- to no-code data configuration will allow developers to integrate with LOB systems or file-sharing services faster, and make it possible for even non-technical users to configure integration points.	
3-7	Does the solution support single sign on for external systems?			

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4 MOBILE				
4-1	Can applications to automate processes be built once and accessed from any device, whether desktop, tablet or mobile?	Applications should be built in a responsive design, so they can be accessed from any device.	Business is increasingly being done on the go, so it is more and more important that users be allowed to work from tablets and mobile devices, in addition to desktop computers.	
4-2	Can user tasks within a workflow be accessed and completed from a mobile device?	Users should be able to approve tasks within a workflow or complete an assigned task within a workflow from any device.	Users may need to approve an urgent request on the go or review critical information. The ability to do this from a mobile device will make it easy for users to get work done, no matter where they are or what they are doing.	
4-3	Can information be captured from a mobile device?	Users should be able to capture/input information from a mobile device.	For some people, work does not take place at a desktop, so the ability to capture information in real-time through a mobile device is critical.	
4-4	Can your forms trigger a workflow from a mobile device?	The act of submitting a form from your mobile device should be able to trigger a workflow based on predefined rules.	Being able to trigger a workflow from your mobile device will save you the time and trouble of having to log on to your desktop computer to initiate a workflow separately.	
4-5	Can information still be captured when offline, from a mobile device?	User should still be able to input information into forms from a mobile device, even if they have no Internet connectivity, with the forms automatically syncing with back-end systems once the user is back online.	There are times when users may not have Internet connectivity but still need to capture information. The ability to still use your forms offline makes it possible for users to work anywhere at any time.	

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5 USER AND RUN-TIME EXPERIENCE				
5-1	How can workflow processes be started?	You should have a variety of ways you can start a workflow process, such as: • Form submission • SharePoint events, such as an item being created or modified (if your applications integrate with SharePoint) • Manually started by user • Scheduled or time based • External system events	Flexibility in determining how a workflow is initiated will make it easy to set up tasks in a way that best meets the needs of your organization.	
5-2	Can the product start/ stop other workflows?	You should be able to call other processes from within a process as needed. When calling subprocesses, the parent process should be able to: • Call the subprocess directly and continue processing • Call the subprocess, pass data from the parent process, and continue processing. • Call the subprocess, pass data from the parent process, pause processing until the subprocess completes, and then work with any data returned.	There are different times when you might need to call one process from another or have a larger parent process that encompasses a number of smaller processes. Having flexibility with how these subprocesses are executed will ensure that your workflows are able to meet your organization's needs.	
5-3	Can workflow processes be started in bulk?	You should be able to start workflows in bulk (or batches) as needed.	If you have a number of processes that are linked and need to be started simultaneously, the ability to start them in batches can save administrators a lot of time.	
5-4	Does the solution have the ability to modify, terminate, update and suspend in-flight processes?	This should be a core functionality of any process automation solution.	Sometimes changes need to be made to processes on the fly, so the ability to stop or modify a process is a critical feature for any system to have.	
5-5	Does the solution provide a rules repository?	There should be multiple levels of rules that can be implemented at the forms/user interface (UI) level, workflow level, and data level when processes are designed. All rules should be able to be managed independently as they relate to the UI, process and data layers.	Predefined rules make it possible to use your forms and workflows to automate business processes, like quote to cash and case management, which may cross users, system and departments.	

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5-6	What kind of destination rules (i.e., task assignment options) are available when designing applications?	During process composition, tasks assignment should be possible at the following levels: • Individuals – It should be possible to assign tasks to an individual user from Active Directory or other user managers • Groups – It should be possible to assign a task to a group of users from Active Directory or other user managers • Roles – You should be able to create dynamic teams with roles being able to incorporate users and groups across the business and provide flexible task assignment options without the need to make changes to core systems like Active Directory. • Voting scenarios – It can also be useful to be able to implement voting scenarios to assign tasks (i.e., a task is approved only if x number of people approve a task) • Line-of-business systems – Your applications should be able to retrieve users from a line-of-business system. For example, if a process includes a reference to a customer, the task should be assigned to the account manager for that customer. To do this, the process, at runtime, should retrieve the account manager from the CRM system for that customer. • Business-rules driven – Your applications should be able to leverage business rules, which are defined when the application is built, to determine the most suitable task assignee. For example, if a customer request is submitted, the associated process could assign the task to a team of people based on the requester region, language and requested product. • Task assignment rules – other task assignment rules that might be useful for your applications to provide include: *Get least work – Gets the user in role with the least number of task items. *Get Most work – Gets the user in a role with the most number of task items *Get round robin – Gets the next user in a round robin role. *Get fastest user – Gets the user in a role with the shortest average task duration. *Get slowest user – Gets the user in a role with the longest average task duration *Get role peers – Gets the users in a role with one defined user excluded.	Flexibility in determining how a task is assigned will make it easy to set up tasks in a way that best meets the needs of your organization.	

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5-7	What kind of manual assignment options are available after process execution?	Functions to perform manual allocation of tasks should include: • Redirection – Tasks should be able to be manually redirected, moving a task from Person A to Person B. • Delegation – Tasks should be able to be manually delegated so that Person A now shares the task with Person B. • Out of Office – A person should be able to activate an out-of-office feature, which then defines task redirection rules on a per process basis.	Destination rules drive automated task assignment during process execution, but tasks often need to be reassigned manually during process execution too, such as when a manger is assigned all tasks and needs to delegate or when someone is out of the office.	
5-8	Does the solution have conditional task assignment options?	The solution should be able to perform conditional routing, where a path in the process will only execute when a defined business rule is met, such as an additional authority review if an expense claim exceeds a specified amount.	Conditional task assignment functionality will give you more flexibility with your workflows and allow you to set up multiple tiers of approval without senior level approvers having to also deal with things that others can handle.	
5-9	Can applications be designed to capture multiple user responses?	When a task is assigned to multiple users, the system should be able to track each response individually and evaluate all responses against predefined business rules to determine which path the task is routed to next	This capability will ensure that the task is always routed correctly, depending on who has reviewed the task and how they have responded (whether approved, rejected, or sent back to a previous step for rework).	
5-10	Does the solution have any alert/notification/ escalation capabilities?	Alerts and notifications should be able to be set up in a variety of ways in the workflow, such as through tasks, escalations, custom alerts, etc. For example, if a task is approved, an alert should be able to be set up to notify all parties. Likewise, it should be possible to create alerts based on duration or date, such as if a task has not been completed within x number of hours.	Alert and notification capabilities help keep managers aware of the status of a task, and also allow them focus on other aspects of their job without worrying about whether or not a task is being completed since they will notified if there is an issue. These capabilities can also save organizations from incurring late fees and fines due to missed deadlines.	

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6 REPORTING, ANALYTICS AND MONITORING				
6-1	Does the solution have any monitoring capabilities?	The solution should provide detailed reports around the status of each process and their instances, including global work lists, running processes, process history, real-time tracking and more. The system should also be able to capture and report any process instance that has gone into an error state, and a logging framework and performance counters should be provided to report on and monitor server activity.	Monitoring capabilities allow managers to see how their processes are performing at any given time and even track the history of a process year over year to identify trends or further areas for improvement.	
6-2	What out-of-the-box reports does the solution provide?	Out of the box, the solution's reports should span real-time, historical, auditing and analytical information to give users a complete view of their processes and how effectively the organization is being run. Out-of-the-box reports should include: Activity statistics Process information • Process overview • Process statistics • User performance	Reports give IT and managers improved visibility into how effectively the organization is being run, This will, in turn, allow managers and IT to introduce efficiencies into business processes that might otherwise have gone unnoticed without the aid of reports.	
6-3	Does the solution provide custom reporting capabilities?	The solution should make it possible to customize reports based on varying business needs, without having to deal with code.	Managers often need more specialized reports that focus on a specific set of criteria. The availability of custom reports can help them identify trends, expose inefficiencies, and make important business decisions quickly.	
6-4	Does your solution provide wizards or visual tools that allow non-technical users to create custom reports?	Your solution should provide tools that non-technical users can use to create custom reports, such as a visual, drag-and-drop wizard-based experience	With many systems, custom reports require technical expertise to produce. Technical resources don't always have time to produce these kind of reports, so if business users can produce these reports on their own, this gives them information that might not otherwise be available.	
6-5	Can reports be created to include workflow data captured in a particular process?	The reports you use should be able to capture workflow data and audit trail and performance data linked to line-of-business systems.	This allows users to create reports that combine information about both the process and the LOB data the process uses.	

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6-6	What kind of auditing capabilities does the system provide?	The solution should provide full auditing capabilities that track all details of a process from overall process performance to who performed a specific workflow step and how long it took to complete.	Auditing capabilities help organizations ensure that all compliance regulations procedures are adhered to, and in the event of an audit, makes it easy to gather the right information for auditors.	
6-7	Does your solution have the ability to use standard reporting (third-party) tools for workflow data?	Your solution should be able to work with industry standard reporting tools, in addition to any reporting capabilities it comes with.	This gives organizations the option to use reporting tools they are already have or are familiar with.	

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7 MANAGEMENT				
7-1	Does your solution provide a management console or dashboard to monitor and manage tasks?	The solution you choose should come with a management console or dashboard that lets you view and manage tasks from a central location, as well as create reports to analyze process performance.	This will provide full visibility into the business and help users easily manage processes, identify and eliminate inefficiencies, provide more accurate forecasting and budgets, and more.	
7-2	Is management information available in real time or is the data aged?	Information should always be available in real time, so you know the information you are reporting against is accurate. Business apps that provide a conduit to where the data lives in its LOB system instead of actually storing information in the app itself ensure that the information is always up to date.	Some systems with integration capabilities connect to back-end systems on a schedule, which means you never know if the data you're receiving is the latest or not. Having real-time information can make a huge difference when compiling reports or trying to make critical business decisions that require up-to-date information.	
7-3	What kind of administrative features are available?	The solution you choose should provide a place where administrators can manage various aspects of the platform, such as setting process security and permissions, viewing error logs, making repairs, managing process versions, and scheduling processes to run on a recurring schedule.	This is core functionality that any process automation system should come with to ensure that processes run smoothly.	
7-4	Does the solution come with workflow auditing capabilities?	Your solution should provide detailed information about each step in a process, including who made a decision, what decision was made, and what information was added or updated. In addition, auditing of additional information or writing an audit trail to a different data source should be able to be easily added to the application as necessary.	Keeping a detailed audit trail is a critical piece of many applications, especially in industries, like healthcare and financial services, that have many regulatory rules that organizations must comply with.	
7-5	What does the solution provide in terms of item and queue management?	Process owners should be able to reassign or delegate tasks for all users across the processes that they manage. They should also be able to create escalation rules that remind users of the tasks assigned to them, and either alert managers are tasks that aren't getting done to avoid missed deadlines.	Since managers sometimes have all tasks initially assigned to them to delegate further, it's is important that they can reassign tasks as needed. Escalation rules can also play a big role in helping with queue management and preventing tasks from getting overlooked.	
7-6	Does the solution support refinement of a single process by multiple roles (i.e., can business users change and modify a process that has been built by developers)	A low-code solution that makes it possible for technical and non-technical users alike to quickly build and modify processes as needed without waiting on developer resources.	Low-code applications will make your organization more flexible and agile by allowing non-technical users to manage their own processes, so developers can focus on mission-critical projects.	

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7-7	What kind of error handling for system failures and process syntax errors prior to deployment does the solution provide?	The solution you choose should be able to conduct a pre-deployment check to ensure that a process is valid before it is deployed. When designing a process, you should be able to specify error rules at the event, activity, line and process level, which will execute in the event that an error occurs. Your solution should also provide management tooling that allows you to view process instances that are in an error state and provide recovery options.	Proper error handling and recovery procedures that are built into your solution will allow you to easily recover and fix process instances if an error should occur.	

8	MAINTENANCE/SUPPORT/HELP DOCUMENTATION			
8-1	What is your software release process? How often are releases updated?	While it is normal for major releases to be made every few years, minor releases should happen on a fairly regular basis to maintain the stability and supportability of major releases.	Regular releases will ensure that your product is supported and staying up-to-day with the latest technological changes in the market.	
8-2	Are your upgrades or releases included in the maintenance contract, or are they a licensing event?	Upgrades and releases should be included in the maintenance contract.	Including upgrades and releases in the maintenance contract will ensure you don't have to pay twice for your product.	
8-3	Do you offer training? What types of offerings are available?	Training should be available that can be customized according to a customer's specific needs and requirements – even job roles, if applicable, such as business analyst, developer, end user, etc.	Training offerings are important to ensure that your employees have the knowledge they need to get the most out of the solution.	
8-4	Do you have online help manuals or other self-help material?	The solution you choose should provide some time of online help, such as a support portal, help files, and/or a support desk.	Online help manuals or a support desk will ensure that you have the support you need if you run into hiccoughs.	
8-5	Do you have any community sites where users can collaborate with other users or find fixes, custom solutions, etc.?	Ideally, your solution should also have a community site, where users can collaborate, and share information and code artifacts, etc.	A community site can be a great way to see what others are doing with the solution and get ideas for your own organization.	

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