

Creating & Upgrading SharePoint Workflows

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About me



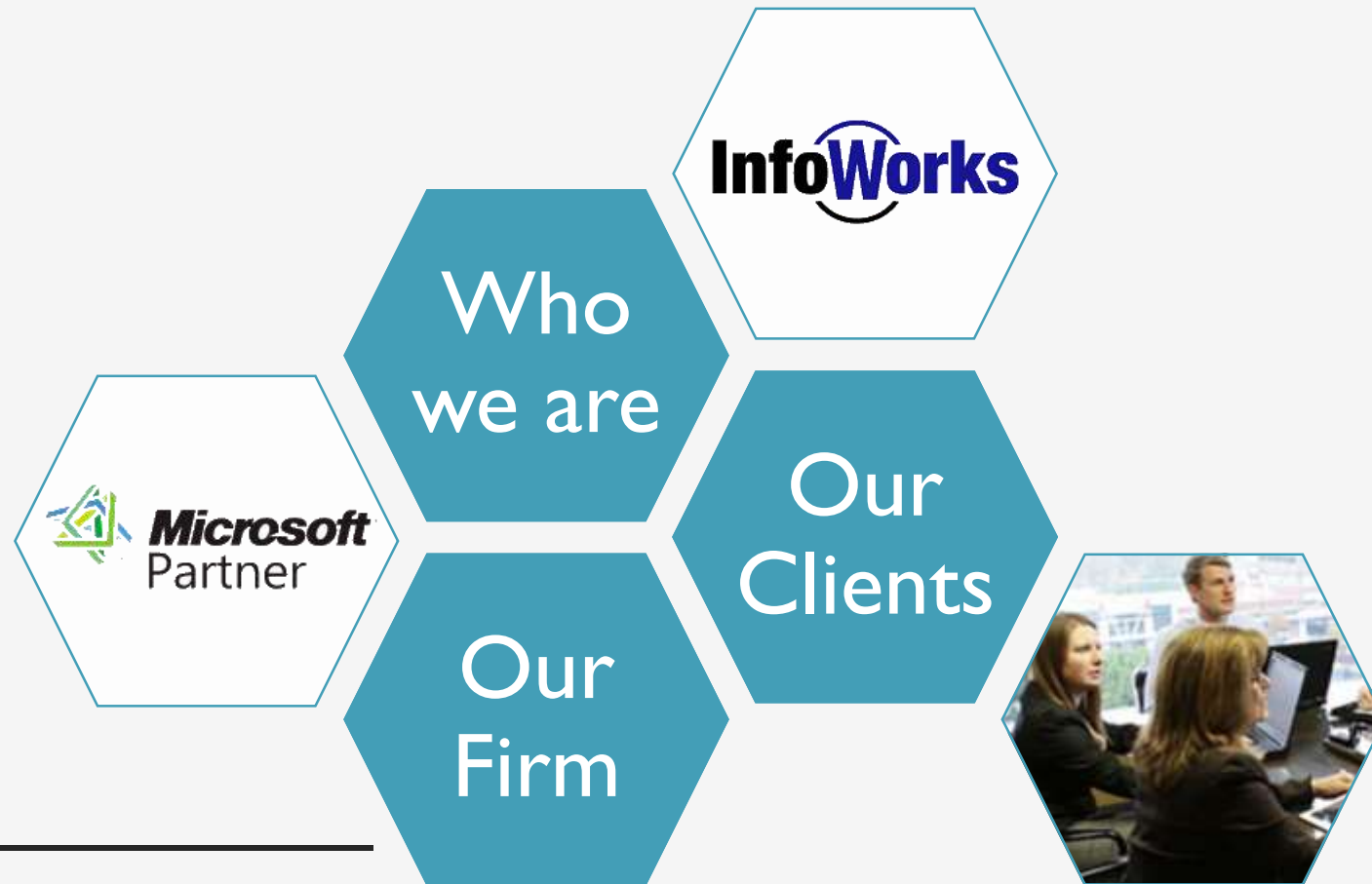
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Who is InfoWorks?



Who is InfoWorks?

- We are a Business and Technology Consulting firm with over 100 employees
 - Founded 20 years ago by several former IBM Global Services employees looking to focus on regional work
 - Located in Nashville, TN
 - Corporate culture focused on work-life balance
 - 100% Employee Owned
-



Who is InfoWorks?

- We work with companies of all shapes and sizes
 - Fortune 500 companies
 - Small and medium size organizations
 - Non profit organizations

 - We work with a diverse set of industries
 - Financial Services
 - Healthcare
 - Higher Education
 - Manufacturing
-



Who is InfoWorks?

Commitment to Clients, Culture, & Community

Our Firm



Agenda

1. Workflow History
 2. Options for SharePoint Workflow
 3. Introduction to Microsoft Flow
 4. Why Migrate to Flow
 5. Migration Process
 6. Obstacles to Migration
 7. Recommendations
 8. Q/A
-



01

Out of the
box

02

SharePoint
Designer

03

Third-party
(K2, Nintex,
etc.)

04

Visual
Studio

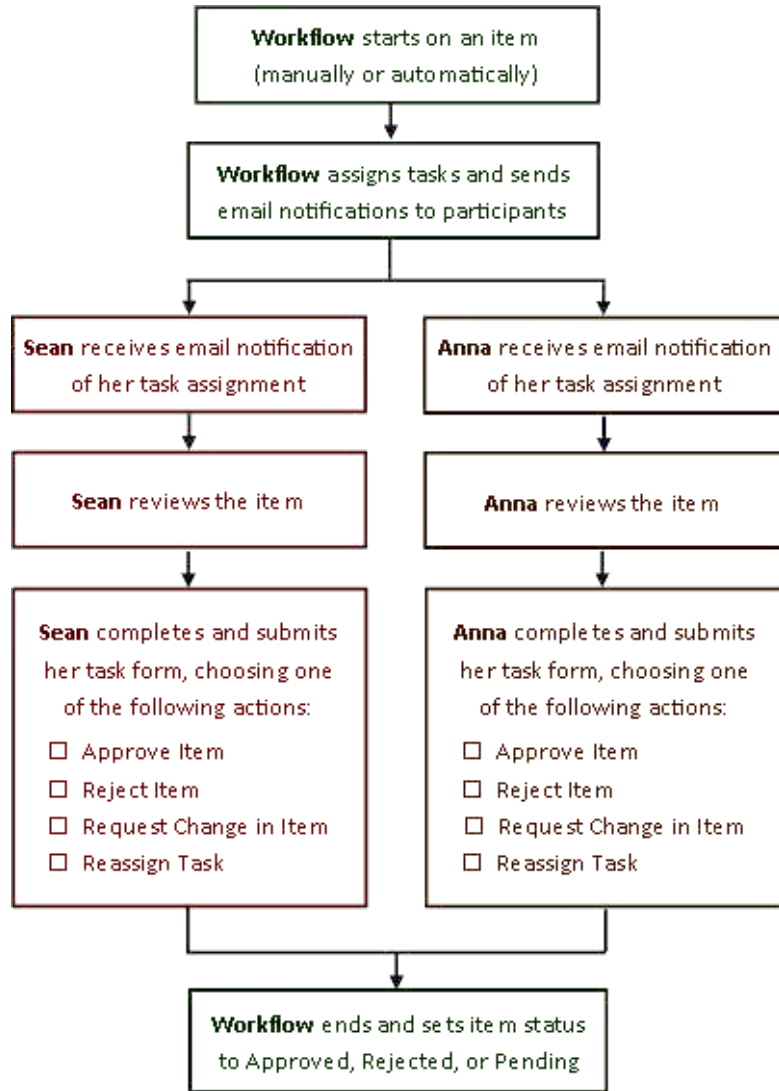
05

Microsoft
Flow

History of SharePoint Workflow

SharePoint Workflows

- Approval
- Collect Feedback
- Collect Signatures
- Three-State
- Publishing Approval



SharePoint Designer

1

Flexibility vs
built-in
workflow

2

Conditional
actions

3

Associate
with content
types

4

Modular
actions

5

Webservices

*Intro to
Microsoft
Flow*



Microsoft Flow helps you **work smarter** by automating workflow across your apps and services



Get notifications



Synchronize files



Collect data



Automate approvals



Get started quickly with hundreds of useful templates

The screenshot displays the Microsoft Flow gallery interface. At the top, there is a navigation bar with the following elements: a grid icon, the word "Flow" with a "Preview" link, "My flows", "Browse", "Learn", and a search bar labeled "Search templates...". Below the navigation bar, there are two dropdown menus: "Showing All flows" and "sorted by Popularity". The main area contains a grid of 16 flow templates, each with a title, a description, and a "By Microsoft Used" count.

Flow Title	By Microsoft Used
Create a to-do item in Wunderlist for important emails	254 times
Save my email attachments to a SharePoint document library	195 times
Get daily reminders in Email	103 times
Save tweets to a CSV file in OneDrive	99 times
Translate non-English emails	56 times
Save email attachments to Dropbox	55 times
Send me an email when a new file is added in SharePoint Online	54 times
Get a text notification when you receive an email from your manager	53 times
Copy new files in Dropbox to a specific folder on OneDrive	51 times
Email yourself new Tweets about a certain keyword	40 times
Save tweets to a CSV file in Dropbox	33 times
Copy files between OneDrive and Dropbox	32 times
Send me an email when a new item is added to a SharePoint Online list	-
Post to Yammer if new tweets match with hashtag	-
Get Office 365 email notifications forwarded to Slack channel	-
Share my Tweets on Facebook	-

Build your own flows in an easy to use visual designer

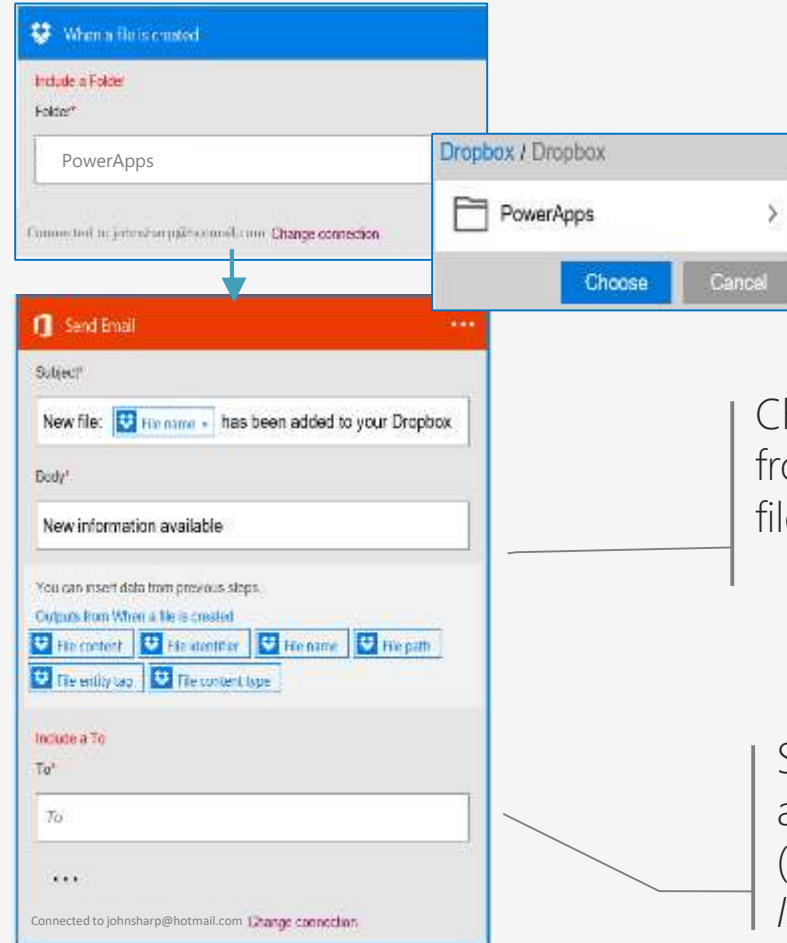
Sending an Exchange email when a new file is added in Dropbox

Authenticate to your Dropbox account.

Select folder to monitor

Authenticate to your O365 account.

Build email *Subject* and *Body*



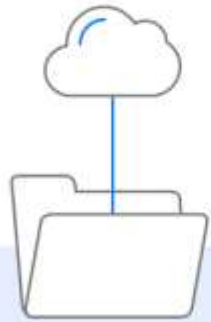
Choose to include properties from previous step (Dropbox file) to improve relevance

Specify *Send To* email address and additional properties (optional): *From*, *CC*, *BCC* and *Importance*



Integrate the systems
you're already using...
even custom APIs.

Flow Free



Free

750 runs per month
Unlimited flow creation
15-minute checks

Flow Plan 1



\$5.00
per user/mo

4,500 runs per month
Unlimited flow creation
3-minute checks
Premium Services

Flow Plan 2



\$15.00
per user/mo

15,000 runs per month
Unlimited flow creation
1-minute checks
Premium Services
Org policy settings

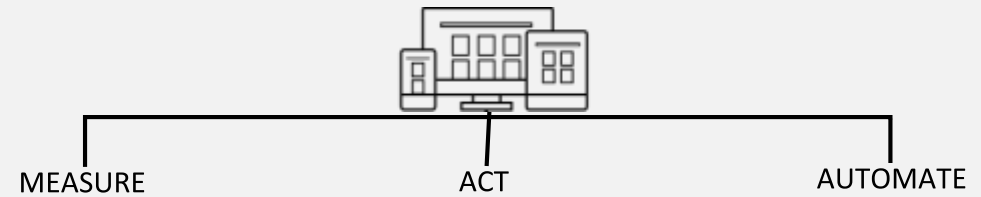
Flow for Office
365 and Flow
for Dynamics
365

2000 runs per month
5-minute checks

Business application platform innovation

Build modern business apps fast

Compose analytics, user experiences, and automation using an integrated set of services from Microsoft



Empowered power users

People who understand their business needs best can now build apps quickly without writing code



Power BI



PowerApps



Microsoft Flow

More efficient developers

Seamlessly extend capabilities for power users and leverage powerful Azure platform services

SQL Server BI
Data analytics
Internet of Things (IoT)
...

App Services
Service Fabric
Azure Functions
...

Logic Apps
API Management
BizTalk
...

Connected data across apps

Whether built on the Common Data Model or integrated with existing systems, get more value from your data



Common Data Model



Connectors & Gateways

*MIGRATE YOUR
WORKFLOWS?*





Why move to Microsoft Flow?



Migration Process

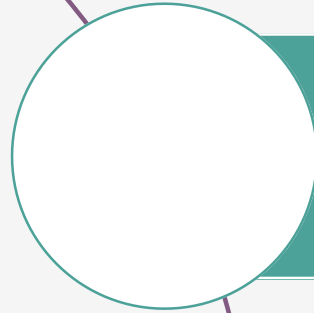
No easy button

No third-party tools

Migration is manual

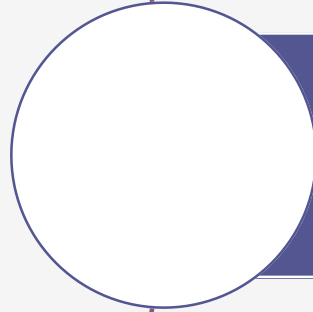


Migration Process



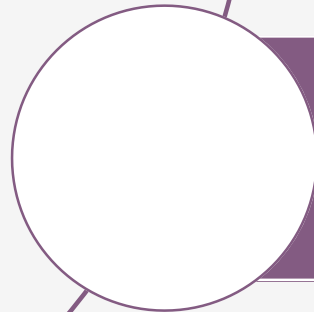
Document your workflow

- Use Visio
- Involve your business users



Revise the workflow

- Processes change, so should workflows
- Introduce new functionality or streamline



Technical considerations

- On-prem data will require a data gateway
- As of now, workflows start as user who created them



01

Gaps in
functionality

- Using metadata for
action

02

License Cost

03

Project Budget /
Time

Stay tuned - SharePoint Virtual Summit - May 16, 2017 -
DanielGlenn.com/SPsummit17

Obstacles to moving to Microsoft Flow

Recommendations

Have Office 365

Start using MS Flow for new workflows

Determine ROI for migrating existing workflows

Don't have Office 365

Use MS Flow Free plan or get a trial

Evaluate ROI on subscriptions

New to SharePoint workflow

Start in MS Flow

Questions?



Thank you!

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