BPMS, SharePoint or Both? It’s Your Choice

An in-depth discussion to help you make the right decision

Executive Summary

Choosing the right technology for your process improvement initiative can be challenging. For organizations reaching the next stage of process maturity, challenges around distributed departments, complex multi-level workflows and mobility are forcing business owners to seriously consider a Business Process Management Suite (BPMS) for the first time. When it comes to process optimization, businesses have three main options: refine their manual processes with an internal development, consider tactical workflow technology, or move to a BPMS. For many thousands of SharePoint users, the issue is even more pertinent: can I achieve what I want through my existing (SharePoint) workflow tools? If not, why not? What options do I have? This paper outlines the pros and cons. By the end, you should have a clear view of what route is right for you.
SharePoint - an overview

The popularity of SharePoint within the enterprise is in no doubt. Its ease of use, rich functionality and hundred-million-plus user base has led to widespread adoption of its many capabilities. From content management and collaboration tools to intranets and portals, SharePoint is many things to many different people. For some, this includes workflow. For the C-level team thinking of moving into BPM, this creates many questions, such as:

- How powerful are SharePoint's workflow capabilities? Can it deliver BPM?
- How do I justify spend in standalone BPMS if SharePoint isn't up to the job?
- What integration options are there? How robust are they?
- How can I support business people to create and amend their own business processes?
- How can I future proof my strategy for ongoing process improvement?

To answer any of these questions, let’s define what we mean by ‘workflow’ and BPM.

What’s the difference?

SharePoint workflow and BPM solutions

These terms are often lumped together and even used interchangeably. But to choose the right tool for the enterprise, it pays to sharpen the definition. At the most general level, most would agree that workflow is designed for modeling simple sequences and BPM is capable of handling more complex tasks. But let’s go a step further. According to analysts:

**BPM** is a “structured approach employing methods, policies, metrics, management practices and software tools to manage and continuously optimize an organization’s activities and processes.”

On the other hand:

**Workflow** “is concerned with tasks and application-specific sequencing of activities through a series of predefined steps, involving a small group of people and/or closely related applications.”
Let’s assume that workflow technology can help you design a series of tasks. It then enables you to deploy them within a predefined process. Through notifications and alerts, you can track where your processes are, while reports allow you to monitor how they’re performing.

The following chart makes comparisons between Workflow and BPM based on capabilities and task suitability:

<table>
<thead>
<tr>
<th>Capability</th>
<th>Workflow</th>
<th>BPM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integrate data across applications in support of business processes</td>
<td>Custom APIs</td>
<td>Standards, Web Services</td>
</tr>
<tr>
<td>Enable sequential processes across users with logic</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Support multiple path process flows</td>
<td>Custom</td>
<td>Supported</td>
</tr>
<tr>
<td>Document routing and approvals</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Focus</td>
<td>Task Routing</td>
<td>Process Lifecycle</td>
</tr>
<tr>
<td>Process management and customization</td>
<td>IT</td>
<td>Business</td>
</tr>
<tr>
<td>Tools to continuously monitor, analyze and improve</td>
<td>Custom</td>
<td>Integrated</td>
</tr>
<tr>
<td>Scope</td>
<td>Application/Department</td>
<td>Enterprise</td>
</tr>
<tr>
<td>Process modeling and optimization</td>
<td>Limited</td>
<td>Collaborative/Advanced</td>
</tr>
<tr>
<td>Reporting</td>
<td>Limited/Custom</td>
<td>Built-in dashboards</td>
</tr>
<tr>
<td>Exception management</td>
<td>Compiled/Static</td>
<td>Runtime/Dynamic</td>
</tr>
<tr>
<td>Task simulation</td>
<td>Limited</td>
<td>Advanced/Integrated</td>
</tr>
<tr>
<td>Web-based publishing</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Multi-language, multi-currency</td>
<td>Limited</td>
<td>Supported</td>
</tr>
<tr>
<td>Reference models (e.g. support for federal standards)</td>
<td>Custom</td>
<td>Available (vendor dependent)</td>
</tr>
<tr>
<td>Process chaining and context passing</td>
<td>Static</td>
<td>Dynamic</td>
</tr>
<tr>
<td>Escalation and alerts</td>
<td>Custom</td>
<td>Multi-level / Built-in</td>
</tr>
<tr>
<td>Forms creation</td>
<td>Custom</td>
<td>Supported</td>
</tr>
<tr>
<td>Business rules defining</td>
<td>Custom</td>
<td>Supported</td>
</tr>
<tr>
<td>Mobility support</td>
<td>Custom</td>
<td>Supported</td>
</tr>
</tbody>
</table>

*Figure 1: Comparing the capabilities of workflow and BPM at task level*
All this said, SharePoint does have some useful qualities which can be further boosted through investment in BPMS. To understand where SharePoint sits on the workflow vs BPM spectrum, let’s run through the good and not-so-good:

**The good**
As a standalone workflow product, SharePoint works well. It can be used to develop robust workflow applications that can simplify and automate common and form-centric business processes such as approvals, document management, simple HR applications, IT and financial tasks.

**The bad**
As a hub to bring together departments and applications, SharePoint offers a familiar environment and an indispensable source of information, but only at the interface level. However it has to be recognized that SharePoint’s workflow processes are constrained by the Site Collection boundaries. Therefore in any workflow that needs to span organizational boundaries, the Site Collections become difficult to manage and brittle. In order to share information between sites – a budget approval moving between marketing, head office and finance where any of these use their own Site Collections for example – the workflow process will require custom coding so an API is needed, based on its custom Windows Workflow Foundation (WWF) framework, where WF processes are limited to either sequence or state machine patterns.

So there’s the rub: SharePoint does not pretend to act as middleware or an Enterprise Service Bus (ESB) so it does not provide any standards-based application integration features – tasks which are best left to dedicated integration platforms or BPM solutions. This means that any attempt to share information across site boundaries can’t happen without a great deal of custom code or manual workarounds. The result: any endeavour will be brittle and expensive, effectively restricting SharePoint’s workflow capabilities to department or local – not enterprise – level.

**The ugly**
The limitations of SharePoint’s built-in workflow and underlying framework surface quickly when tested against the complexities of true enterprise business process automation scenarios. Some processes are simply too complex or fluctuating to be supported by SharePoint’s native workflows. For example, there is no support for users who make mistakes and need to revert to previous steps.

Multi-level approvals are not supported either - SharePoint routes documents back to earlier approvers, not the author (which of course is best practice in the enterprise environment).

Finally, SharePoint workflows are executable programs and cannot easily adapt at runtime. The main issue here is that any change to the business environment (policy updates, changes to regulation) will not be picked up within the workflow without more custom coding – which hardly supports the notion of continuous, agile, process improvement.

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“adidas’ collaborative BPM solution was designed around the notion of a “Dual portal” strategy. By leveraging SharePoint, we benefit from a rich user experience that maintains integrity over rules and workflow without compromising development speed. Bizagi BPMS enables our UI to be seamlessly and transparently rendered via the SharePoint portal, providing the enterprise with a one-stop-shop for Bizagi-powered applications”.

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Kumar Sathish Ramadoss
Senior Technical Architect, adidas Group
Can SharePoint and BPM work together?

If you’re running SharePoint already, then you’re in good company: Gartner estimates that 80% of the Fortune 500 have adopted this technology. Smart BPM vendors have risen to the challenge by providing a simple integration layer which allows businesses to leverage Microsoft’s unrivalled investment in ease of use, collaboration and UI integration capabilities while adding core BPM functionality. In many cases, this can work out less expensive and quicker to deploy.

This integration is achieved through Web Parts: a simple widget (or app) which can be installed by ‘drag and drop’ into the SharePoint workplace. Bizagi launched their SharePoint Web Parts in Q1 2014. What makes this functionality so special is the way it renders HTML forms dynamically to provide a compelling user experience. Once in SharePoint, business people simply see their processes as icons ready to be clicked, edited and shared with the option to personalize the screen as they see fit.

This layered solution is particularly effective when the organization has implemented a professional BPM solution and wants to drive its benefits to an established SharePoint audience. This was the case at adidas Group that standardized on SharePoint and Bizagi BPMS. By designing the notion of a ‘dual portal’ strategy, SharePoint acted as the interface between the BPM engine and the UI. This solution in no way replaced the full BPMS functionality happening behind the scenes. Instead, it simply acted as a userfriendly interface for very specific parts of the business that would benefit from easy access to the company’s more basic workflows.

Figure 2: Layered BPM provides a quick and simple way for organizations to achieve intermediate BPM capabilities while maximizing their SharePoint investment.
Collaborative BPM Solution

Benefits of an integrated SharePoint/Bizagi BPMS:

- **Quick & simple to install** - Through a drag and drop interface, pre-defined Bizagi Web Parts can be added to the SharePoint workplace, no need for coding.

- **Broad range of intermediate BPM functions** - users can create new cases, work on pending process tasks and access their process inbox, all directly from their intranet portal.

- **Familiar Windows environment** - with ability to personalize the look and feel.

- **‘Click and Share’** - allows processes to be shared across their own communities.

- **Enriched publishing** – multiple options e.g. SharePoint, Word, PDF, Visio, XPDL, Web, Wiki, etc.

- **Enhanced Business Collaboration** - Bizagi acts as the process orchestration layer where all process-related activities are executed, but are instantly accessible in SharePoint. Employees can use their SharePoint portal for process-oriented activities while the process data is centralized and securely managed by Bizagi.

BPM, SharePoint or Both? It’s Your Choice

Before moving to our concluding section, it may be helpful to review what we’ve covered so far. Firstly, that while SharePoint and BPMS may appear to have similar surface functionality, what lies beneath is a whole different story. Reliance on the WWF framework means that any departure from the straightforward, linear workflow requires custom (i.e. restrictive) coding.

Second, while SharePoint is a great starting point, it fails to offer any true BPM technology straight out-of-the-box.

Third, for businesses with a solid BPMS, SharePoint offers a good platform to leverage existing BPM capabilities. In this cases, an integration layer can provide solid support to SharePoint users wishing to model, implement and evolve business processes from the Microsoft environment.
In our final section, we bring together some simple checklists to help assess where your business lies on the workflow-to-BPM spectrum.

**Choose SharePoint:**

- If you need a single, interactive business model that is governed at local level with a clear workflow to support the change.
- For content aggregation – to create intranets, build business portals, manage content and enhance collaboration.
- To create approval workflows – SharePoint’s document libraries have flexible configuration options enabling documents to be approved before they are published to a wider audience.
- For basic workflow creation: SharePoint allows ‘power users’ to create three-state workflows out of the box (create, collect feedback, signature).
- When OTB (out-of-the-box) capabilities are leveraged to the maximum and customization is managed carefully.
- If you do not require tight integration with other data systems and do not need complex exception processing, modeling, optimization and monitoring.

**Choose a layered SharePoint solution with the third party BPMS option to:**

- Leverage Microsoft’s significant investment in ease of use, collaboration and user interface while adding core BPM functionality. Layered solutions can be less expensive and can deploy faster than a traditional full-blown BPMS (depending on the situation).
- Disseminate existing BPM capabilities to an established SharePoint audience.
- Implement robust business process automation and business process improvement (BPI).

**Choose a BPMS to:**

- Customise the workflow or integrate with legacy or other enterprise systems.
- Map critical requirements and compliance at an activity level with full visibility of all touch points.
- Deploy processes through mobiles, desktops and laptops.
- Align collaboration and processes to ensure fast improvements and support.
- Deliver continuous improvement without relying heavily on IT and coding.
- Support the full range of core processes e.g. not those that are document-centric.
BPM solutions typically come with business rules engines that can define and govern processes with logic that is independent of the workflow providing greater flexibility and supporting fast changes.

Most BPM solutions include integration capabilities in the form of APIs and out-of-box connectors to popular enterprise solutions deployed across most large organizations. Additionally, enterprise BPMS provide the capability to easily extend a complex business process across departments, and out to partners, customers and the whole business ecosystem.

**Summary & next steps**

For some, SharePoint workflow may be exactly what businesses need right now. For others, a layered solution can be an effective way of extending the benefits of this important software investment by bringing process thinking to a much broader audience. However, for the majority, the realities of an ever-changing world mean increased customization and complex development – with every step stretching and extending the capabilities of the standard SharePoint workflow and bringing it closer to BPMS. Selecting the right approach now can eliminate headaches later, it can also help control costs, speed up development time and ultimately better serve the business.

*Watch Bizagi Web Parts video and learn how SharePoint and BPM can work in harmony.*

Bizagi Web Parts