Integrify Product Data Sheet

Workflow Management Guide

Table of Contents:

The Integrify Value Proposition

01

Automate critical processes in days, not months. Improve the speed, accuracy, and repeatability of business processes while offering a better employee and customer experience. Integrify is built for ease-of-use, speed of deployment, and continuous improvement.
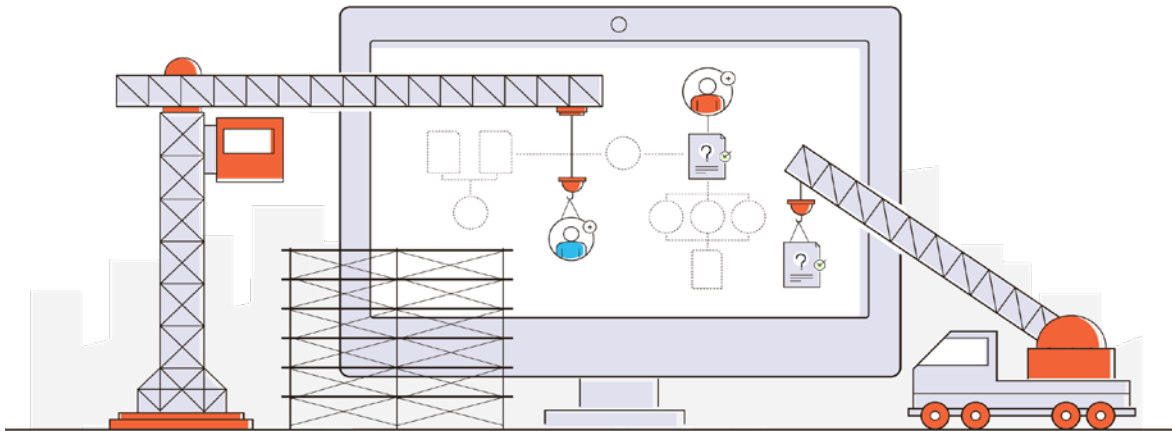
02 | Feature Set

Integrify offers a robust set of tools to build automated workflows for common and critical business processes of all kinds.

At a high level, our software includes:

- Process Builder

- Form Designer

- Self-Service Portal

- Custom Reporting

- Integration

User Portal		Online Forms		Workflow		Reporting
Access to forms, track progress, take action	+	Collect information, ensure accuracy and trigger workflow	+	Route information, apply business rules, integrate	+	Analyze trends, identify bottlenecks, measure improvement

These tools work together seamlessly to design a complete workflow automation solution. We will cover the specific features of each of these tools in the following pages.
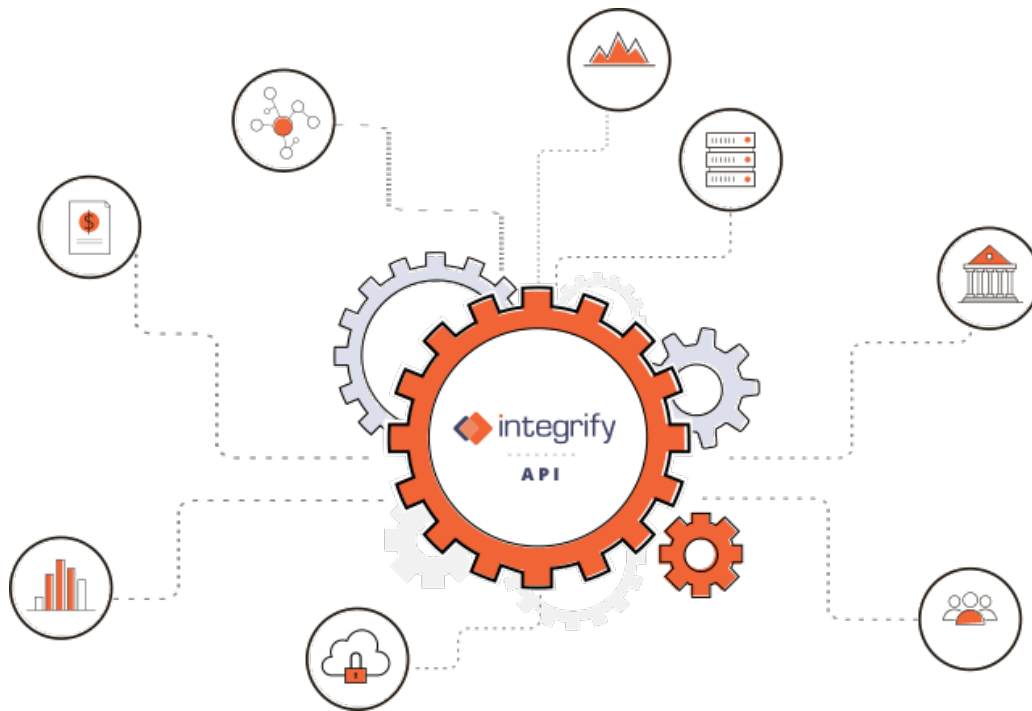
03 Form Designer

Build Responsive Forms for Desktop and Mobile

Create forms the way you want, with full formatting and advanced layout tools that make your forms look great and scale properly on all screens, desktop or mobile.

Our Form Designer has been built from the ground up to make it easy for business users to develop great-looking forms quickly. Include complex form logic, line items, or any other form element you need.

Features:

- Low-code, drag and drop design

- Create responsive, mobile-friendly forms

- Select from a wide variety of field types

- Integrate data from other systems into fields

- Use flexible, multi-column layouts

- Add images, video, tables and links to any form

- Employ powerful form logic to show and hide any form element

- Use calculations and formulas within any field

- Include signatures

- Create re-usable "form parts" containing fields or other form objects

- Use javascript natively for advanced form behavior

- Use CSS to further style form elements

Process Builder

Power and Flexibility for Automating Tasks

Our process builder is designed for power, flexibility, and rapid design. Designing automated workflow processes is as easy as drag and drop. Drag and connect tasks to create a custom workflow that streamlines your business process while replacing manual steps with powerful automation.
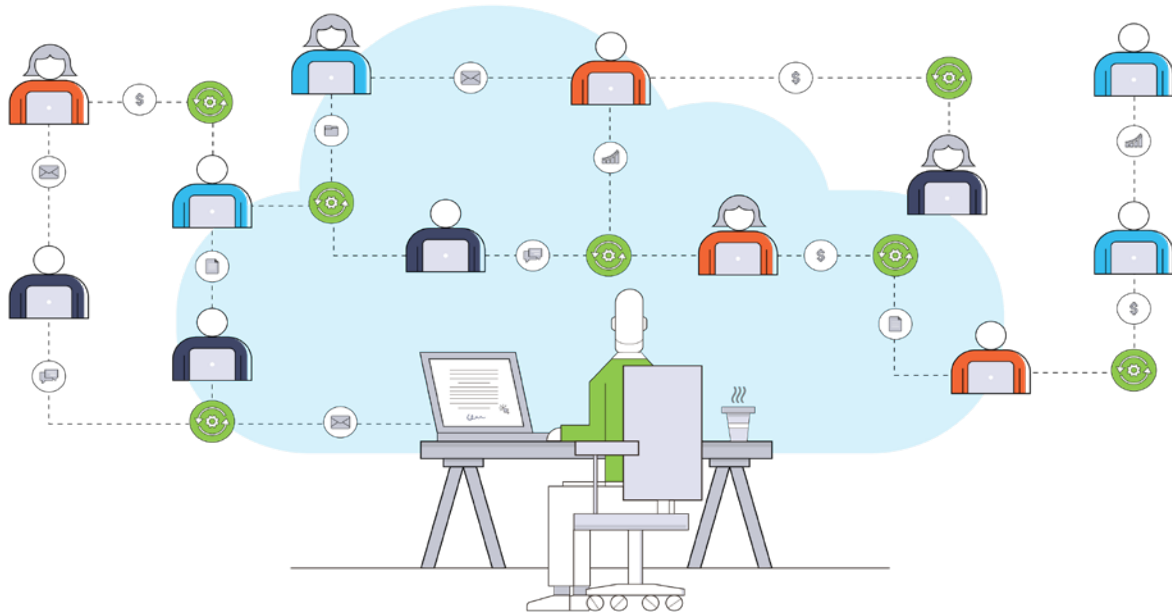
Features:

Design

- Low code, drag and drop building environment
- Create simple or complex business rules
- Assign tasks and approvals
- Collaborate on tasks and requests
- Test run processes
- Copy, export, version processes
- Customize request detail screen

Workflow

- Create single, group or multi-tiered approvals
- Run parallel or sequential flows
- Set up reminders, notifications, escalations, and time-outs
- Create child processes
- Monitor email boxes and trigger workflows
- Integrate data from other systems as part of the workflow
- Choose from over 25 task types including:

    - Approval

    - Task Assigner

    - PDF Generator

    - Task Scheduler

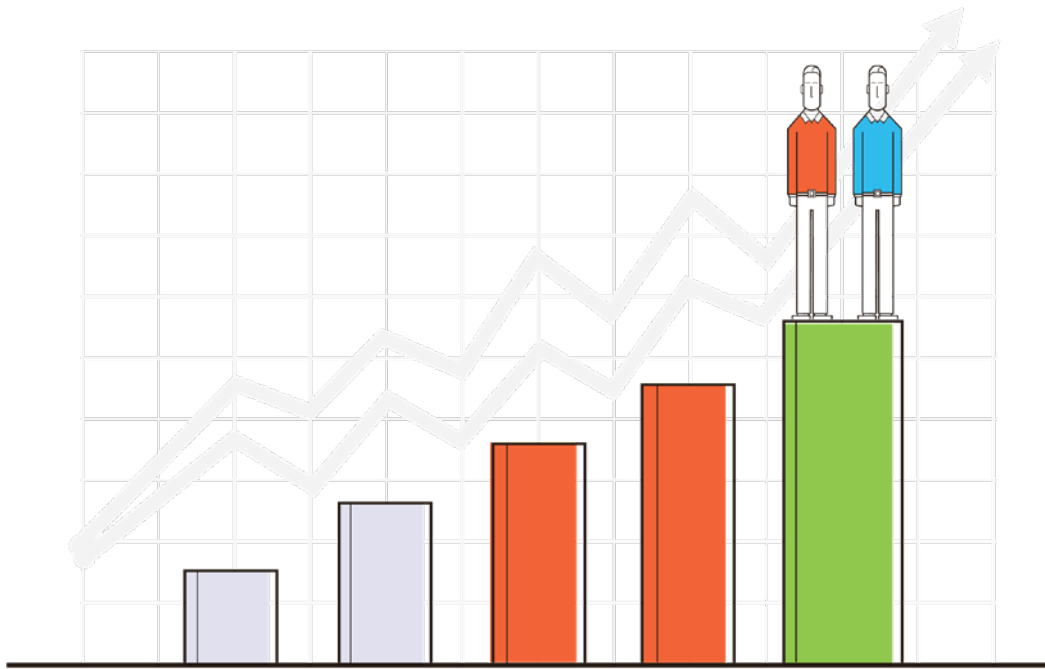   - Database Pull

    - Excel Import

Self-Service Portal

Offer a Better Customer and Employee Experience

Your users can expect an elegant, lightning quick experience across all devices. A modern, streamlined environment will make finding tools easier and navigating the interface a breeze. Reduce training time and provide end-users with a better experience when using the processes you build.

Features

- Provide a responsive, branded portal for internal and external users
- Build custom dashboards to find information and make requests quickly
- Assign roles and permissions to open or restrict access as needed
- Provide collaboration tools to help clarify and document active processes
- Design custom dashboards for different screen sizes
- Allow all users to access and act on all tasks and approvals
- Give users visibility into task and request status and next steps
- Available 24/7 from PC or any mobile device
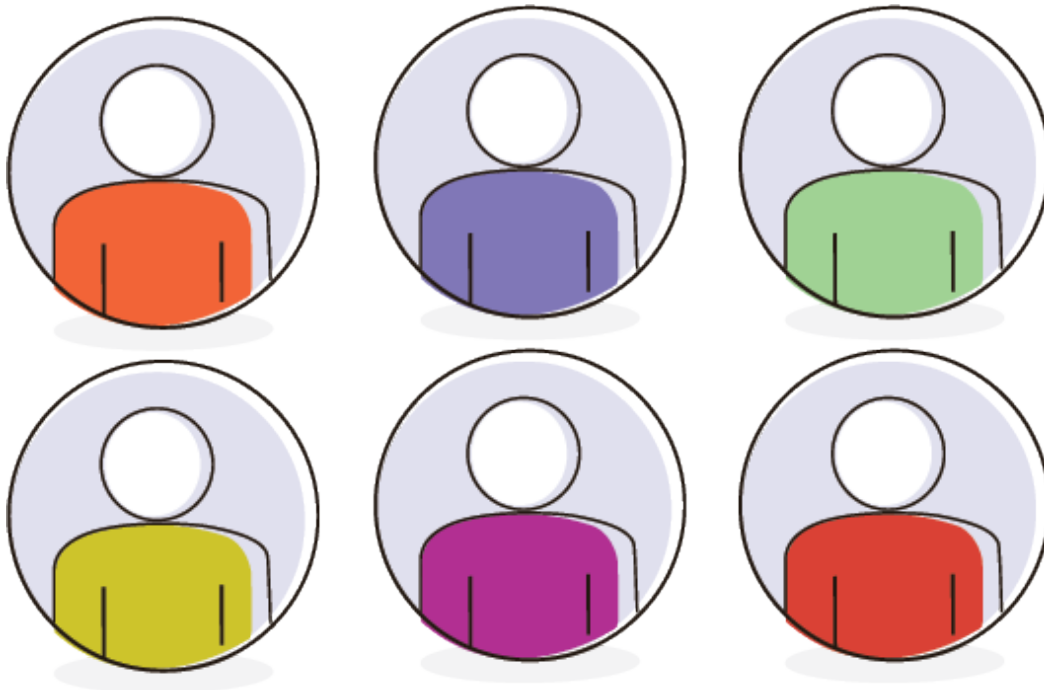- Collaborate on in-progress processes with our Discussion tools
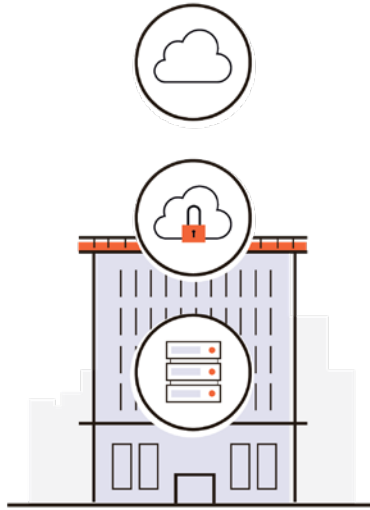
06 Process Reporting and KPIs

Track and measure workflow performance and identify bottlenecks.

All your data and metrics are stored in a relational database. Reports and information can be displayed in real time and scheduled for distribution when users need them. Use visual reports and dashboards to paint a complete picture that can easily be shared around your organization. Follow your team's progress against Service Level Agreements and use scoreboards to track the overall efficiency of your processes to drive improvements.

Features

- Design custom reports

- Report on all activity in your workflow processes including:

    - Form data entered

    - User actions

    - Time and date stamps

    - Comments/discussions

    - Attachments

- Configure and display custom live KPI charts and gauges on your dashboard

- Display a customizable, live request detail showing a complete audit history

- Share dashboards and reports directly via a shareable link

07 Process Integration

Integrate with the Business Applications You Already Use

We know your work doesn't happen in one application. That's why we've built Integrify to connect and share with a variety of applications. And with our open API and AWS Lambda integration we can build custom integrations as well. Integrify's open architecture provides opportunities for our customers and partners to create their own workflow applications with process integration into existing enterprise systems.

Application Integration

- Open API

- Integrify's REST-Based API opens up the Integrify Process Engine to your applications. Programmatically launch processes, complete tasks, check statuses, and much more.

Common integration examples include:

- Viewing the status of a process

- Launching a process in Integrify

- Posting a document to a document management system

- Authentication

- Single Sign-on (SSO)

- OAUTH Flows

- LDAP/Active Directory Authentication

Data Integration

Integrify provides several different task types that push and pull data into other data structures:
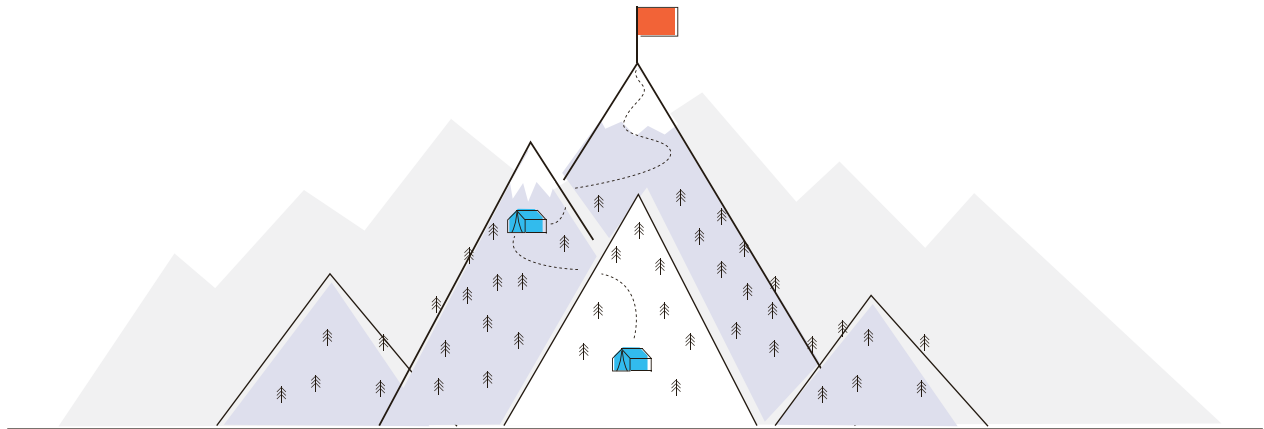
- Database Pull

- Database Push

- Rest Client

- Web Service

AWS Lambda

AWS Lambda is a serverless compute service that runs your code in response to events and automatically manages the underlying compute resources for you. We have provided an AWS Lambda Integration task to use on processes for a variety of functions based on your organization's needs. We will continue to add new functions on a regular basis.

Common examples include:

- Posting a document to a document management system like SharePoint or Box.com.

- Merge form data with a Word document.

- Post messages to slack based on process events.

About Integrify

Our Mission

For over ten years, Integrify has been a leader in request and workflow management. Launched in 2001, with headquarters in Chicago, we've built a reputation for creating software with the customer in mind. Users value simplicity and integration. That has always been the focus of our product. Rapid distribution, broad scalability, and high ROI are goals that we are constantly reaching, only to again set the bar even higher.

We believe that our job is to ensure customer success by helping them to do more with more efficiency. We are constantly innovating to provide compelling solutions that are simple to use and adopt. We believe that we can work together with customers to build solutions to buck the status quo and make organizations more productive.

The Integrify Automation Platform Advantage

- Costs are reduced and employee productivity is increased by reducing approval cycles, minimizing processing errors and streamlining business processes.

- An intuitive Web-based interface reduces the learning curve and extends the administrative capabilities to any area within a company.

- Minimal training is required for using the system so employees can begin using the processes immediately, and business analysts can quickly deploy and modify business processes without understanding programming or database systems.

- Integrify leverages existing systems, extending their reach to provide error-free data collection, tracking, reporting, and visibility.

- Integrify can handle many types of workflow processes at either the department or enterprise level and will manage requests and approvals in HR, IT, Finance, or any other area within a company.

Want to discuss your workflow management needs? We'd love to talk!

Get a Demo of Integrify

Use Our ROI Calculator

Download More Workflow Management Resources

Learn About Workflow for Finance

integrify