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portal systems

SHAREFLEX – THE BUSINESS APPLICATION PLATFORM FOR MICROSOFT SHAREPOINT

Shareflex|platform gives you a platform for made-to-order digital business applications – easy to configure, even without any programming skills.

Flexible, user-friendly and secure.

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WHAT IS SHAREFLEX?

Shareflex turns SharePoint into a platform for business applications. Shareflex is a business application platform that can be used to configure and customise made-to-order business applications. Portal Systems also provides pre-configured solutions for various business processes based on Shareflex.

With Shareflex|platform, it is also possible to create digital business applications without any programming skills. Shareflex is a platform for integrated business applications and offers integrated features for creating user-friendly interfaces, automating background processes, workflow control, permissions design and the automatic deployment of business applications.

Shareflex provides maximum stability and security. This is one of the reasons why more than 150 customers from medium-sized businesses and industry already rely on Shareflex as a platform for their business applications.

The Shareflex|platform and ready-made solutions are available for SharePoint On-Premises, Office 365/SharePoint Online or in a hybrid environment.

WHAT KINDS OF BUSINESS APPLICATIONS ARE POSSIBLE?

Basically, Shareflex can be used to configure any conceivable type of business application. SharePoint-based business applications are called digital business applications that provide information, documents, process workflows and background actions in SharePoint in such a way that results in an application that is simple and intuitive to use from an end user's standpoint.

Examples of such business applications are the ready-made and standardised Shareflex solutions for the management of contracts, quality, audits, personnel and incoming invoices.

As part of projects, Shareflex templates were developed for managing the specialist processes of meetings, order requisitions, fleets and contacts, among others, and individual customer solutions have been provided for supplier management and evaluation, patent management as well as project management.

Shareflex provides interfaces for the integration of business applications in specific ERP systems such as SAP and Microsoft Dynamics. The limits of Shareflex are thus defined solely and exclusively by the available professional competence.

Understand processes. Find solutions.

WHAT BENEFITS DO SHAREPOINT AND SHAREFLEX PROVIDE FOR YOUR COMPANY?

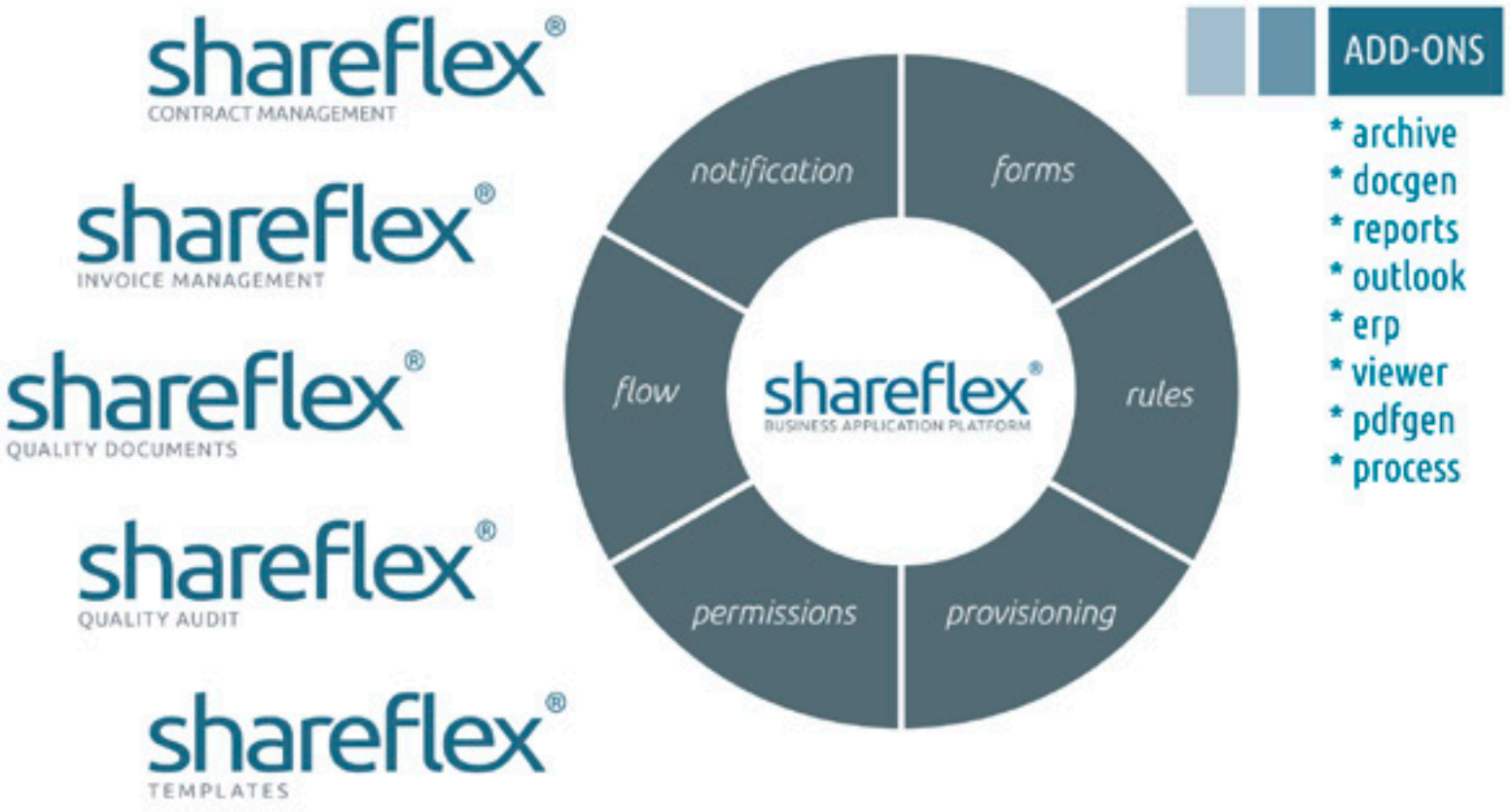
Microsoft SharePoint is used in a variety of scenarios in companies and organisations. Very often the development of an intranet is begun to create a central location for providing and distributing information, including telephone directories, news and announcements, business units and employee profiles.

Following this, use is often extended to project-related document storage to promote teamwork. Even simple form-based processes, such as holiday or travel authorisation requests, are controlled via SharePoint. Wikis are also set up to make information and knowledge accessible to a large number of intranet users.

However, this is where the introduction of SharePoint frequently gets stuck. Firstly, SharePoint quickly becomes too complex for many companies. Secondly, the limited user-friendliness of SharePoint (default installation) often results in a low level of acceptance from affected employees.

Yet there is a lot of potential in SharePoint. Properly configured and deployed, SharePoint is an extraordinarily stable and flexible platform on which, in addition to the applications described above, business processes can also be mapped on the team, department and company level. This makes SharePoint a highly efficient business process platform.

Shareflex bridges this very gap. Shareflex can be used to quickly and easily create SharePoint-based business applications with no individual programming required. This significantly reduces complexity, makes the user interfaces uniform and user-friendly, automates background processes and provides ready-made business applications.



*The **Shareflex „solution engine"** including key components, solutions und add-ons*

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Shareflex is the leading platform for SharePoint-based business applications.

Shareflex and solutions based on it are currently (as of November 2018) already in use at more than 150 companies in a variety of industries – from a medium-sized shipping company to a company listed on the German DAX exchange.

Our customers very often pursue a “dual-platform” strategy, with SharePoint being used as a platform for many (or even all) non-ERP business applications and processes in addition to SAP or Microsoft Dynamics as the company-wide ERP system.

This makes Shareflex the most important building block for most customers implementing their own SharePoint strategy.

As a platform for business processes, Shareflex helps companies to significantly reduce the complexity of SharePoint and to quickly and easily provide highly functional, integrated and user-friendly business applications quickly with no programming (no code) based on standard products.

In addition, Shareflex offers ready-made solutions for various specialist applications, such as contract, quality (DMS), audit and incoming invoice management as well as for personnel files and supporting processes.

All business applications provided on the Shareflex platform are thus based on the same “solution engine” (see Chart on page 7), have an identical look & feel and can be installed in each department with little training required.

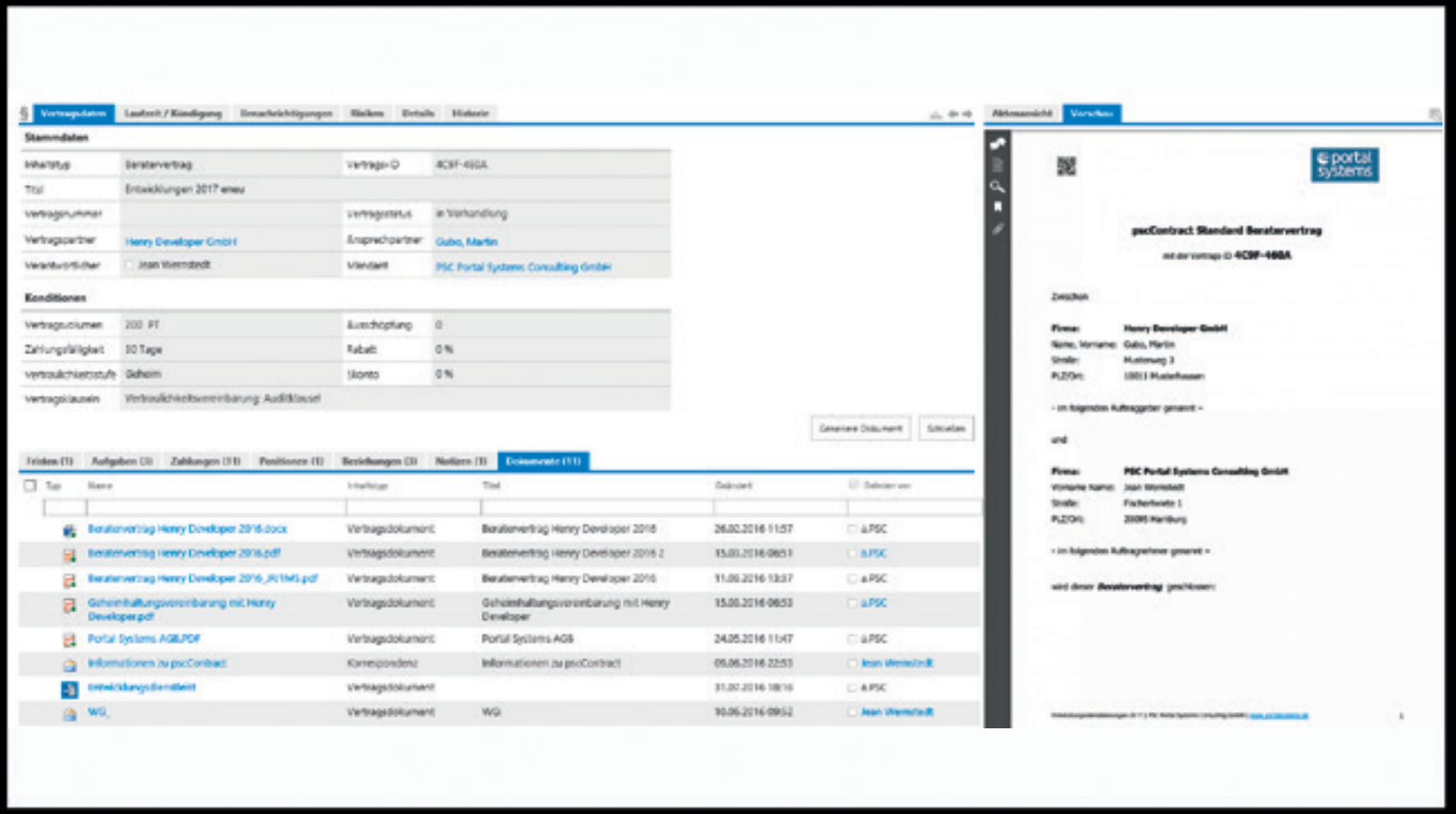
Technically, Shareflex is based entirely on the standard version of SharePoint, both On-Premises and in Office 365/ SharePoint Online environments.

All of the key components of Shareflex, i.e. the “solution engine” described above (FORMS, RULES, PROVISIONING, PERMISSIONS, FLOW and NOTIFICATIONS), are described in detail in the following sections.

WEB-BASED, USER-FRIENDLY INTERFACES

By default, every business application created on Shareflex, the business application platform, provides a user-friendly interface optimised for SharePoint. This is where all the information and documents assigned to a business application are clearly arranged and can be easily understood.

Every business application created using Shareflex is easy to use and requires no extensive training.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Laufzeit / Kündigung
Benachrichtigungen
Risiken
Details
Historie
Stammdaten
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Gubo, Martin
Verantwortlicher
Jean Weinstedt
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PSC Portal Systems Consulting GmbH
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Generiere Dokument
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Aufgaben (3)
Zahlungen (3)
Positionen (1)
Beziehungen (3)
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mit der Vertrags-ID 4C9F-460A
Zwischen
Firma: Henry Developer GmbH
Name, Vorname: Gubo, Martin
Straße: Musterweg 3
PLZ/Ort: 10011 Musterhausen
- im folgenden Auftraggeber genannt -
und
Firma: PSC Portal Systems Consulting GmbH
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- im folgenden Auftragnehmer genannt -
wird dieser Beratervertrag geschlossen:

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FORMS

WIZARD AND FORM DESIGNER

With the Shareflex|forms component, we provide a wizard and form designer for creating and customising the various forms in a business application. With the help of these tools, user interfaces can be created without programming.

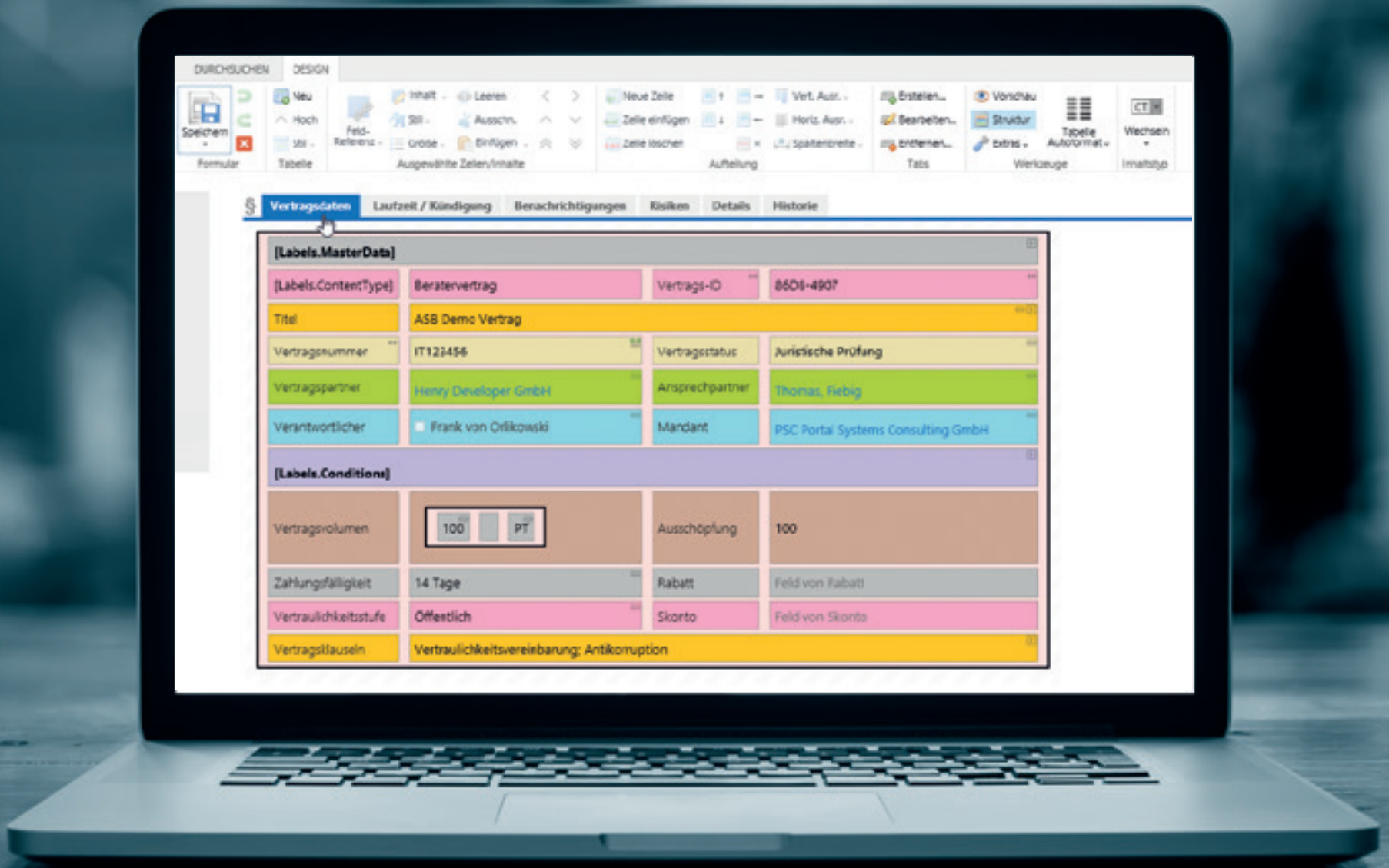
The forms are based on the underlying SharePoint information architecture (lists, libraries) and, as recommended by Microsoft, are provided as plain JavaScript/HTML.

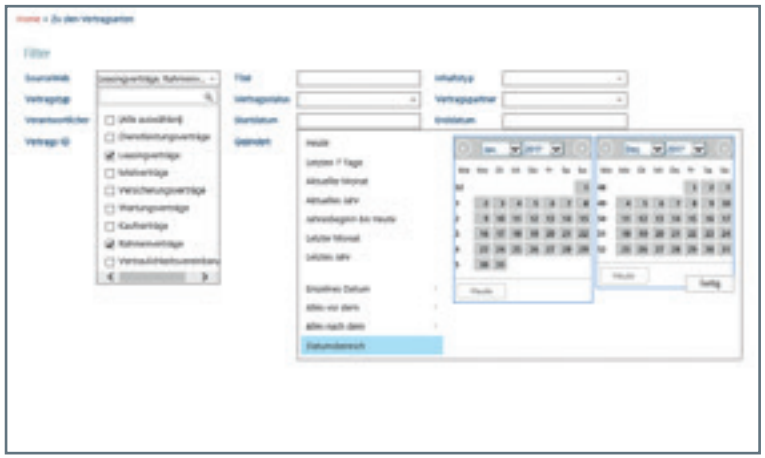
If business requirements change and a customisation of the user interface becomes necessary, customisations to the form can be done quickly and easily by trained specialist administrators using the form designer during ongoing SharePoint operation.

By consistently using SharePoint standards, the user interfaces can be individually enhanced even without the form designer.

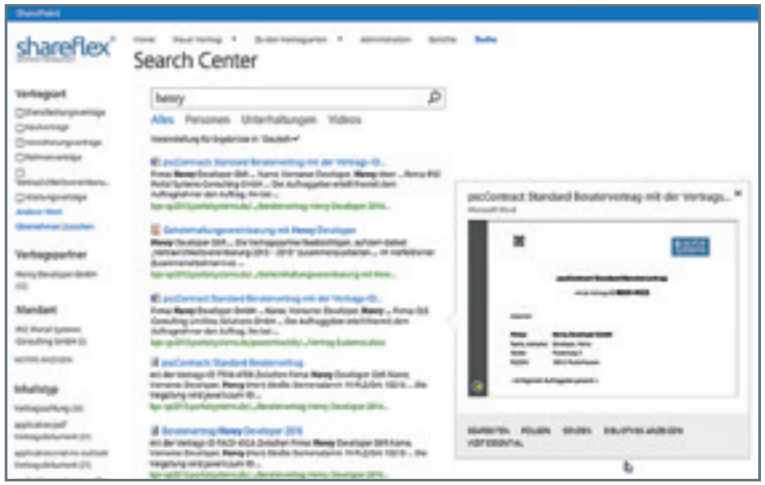
For this purpose, the Shareflex|forms component provides an extensive JavaScript library, which can also be used to quickly and easily implement special requirements.

Shareflex|forms Form Designer





The Shareflex|forms metadata search (here: multiple selection and date picker)



Shareflex|forms with results from full-text search feature a well as metadata and document preview

METADATA/FULL-TEXT SEARCH

Another important contribution to improving user-friendliness is the addition of a convenient metadata search feature using the Shareflex|forms component to the standard version of SharePoint. It enables fast and flexible searches for business objects and documents (filters for lists and document libraries) – also across site collections, of course.

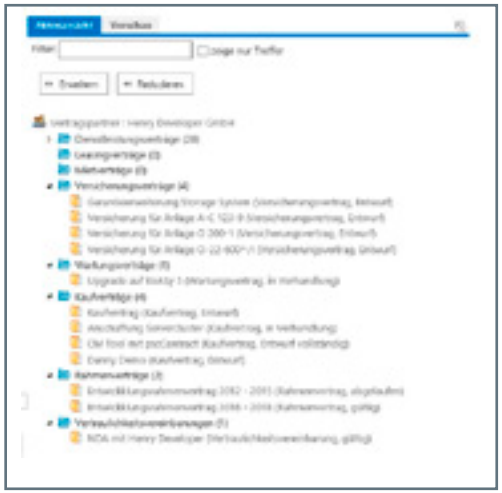
Specially developed input filters are available for the various field types – such as autocomplete search (suitable for mass data), selection lists and easy to use date pickers. Metadata search can be configured in different modes (Default, Compact, Automatic), depending on the specific requirements of each business application.

In addition to metadata search, the standard version of SharePoint can also be extended to include an easy to use full-text search feature, which via search filters guides you to the desired search result in a user-friendly way. A document preview (see description below) can be integrated directly into the search result. You can also jump directly to the relevant business application from the search form.

FILE VIEW/STRUCTURE VIEW

The Shareflex|forms component provides a Structure view (also called File view) to depict the different elements of a business application (objects and documents) or their context. The view is used, among other things, to navigate between the various business objects – also across site collections, of course.

Using integrated search (filters), File view can also be easily searched for larger amounts of data with results that can be quickly and easily seen in a reduced view.



INTEGRATED DOCUMENT VIEWER/PREVIEW

The Shareflex|viewer add-on provides the integrated Adobe Viewer with the standard range of features for displaying PDF documents in a Document preview. If a business application manages other document formats (Office documents, e-mails, images, technical drawings, etc.), VIZIT, the commercial document viewer, or Microsoft Office Web Apps can also be provided alongside Adobe Reader.

Technically, VIZIT, Adobe Reader and Office Web Apps are already integrated in Shareflex and can be quickly and easily enabled at the click of a button. In addition to displaying documents, VIZIT also allows users to add annotations.

Question: *Why is the commercial VIZIT Viewer being provided?*
Answer: Using Adobe Reader and Office Web Apps, Outlook e-mails and many other formats essential for Shareflex users cannot be displayed.

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PROVISIONING

INFORMATION ARCHITECTURE

Shareflex comes with the integrated Shareflex|provisioning component which can be used to install and transfer applications or updates during live SharePoint operation, without installing WSPs and no SharePoint farm downtime.

The manual creation of a SharePoint information architecture with columns, content types, lists, libraries, webs, etc. – often in multiple languages – works quite easily in a single SharePoint system.

It can however be very time-consuming to transfer these structures from the development system to an integration and test system in order to deploy them in the production system. Because this means either carrying out the same manual and time-consuming steps multiple times or developing provisioning code in the form of a farm solution or an app.

The Shareflex|provisioning component makes it possible to transfer the information architecture, once defined, directly from the development system to a test system and finally to a production system. The existing information architecture is analysed and a transfer script is automatically created. This script can now be run in the various SharePoint systems, making the information architecture available immediately. As an integral part of the solution multi-language support is supported by default.

All of the solutions delivered by us, Shareflex product manufacturer Portal Systems AG, and our certified partners are defined and deployed using the Shareflex|provisioning component and at the click of a button are available within just a few minutes. Customers and partners using Shareflex to develop their own solutions and business applications enjoy all of the benefits of this method.

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RULES

BACKGROUND PROCESSES, WORKFLOWS AND PERMISSIONS

Another key component of Shareflex is the easily and flexibly configured Shareflex|rules engine. It can be used to automate all background processes and procedures, classic workflows, and to set business application-specific permissions – without the usual ASP.NET programming.

In Shareflex|rules, all SharePoint features are available as XML functions. This makes it possible to change and customise the background actions of a business application while SharePoint is running, without the need to create and install WSPs and with no SharePoint farm downtime – all with site collection administrator permissions. No access to farm administration is required.

This mechanism allows large farms to be operated worldwide and business units retain the flexibility to design and customise their specialised applications. In the Office 365/SharePoint Online environment, the Shareflex|rules component is provided in a Microsoft Azure environment, offering a range of features comparable to a SharePoint On-Premises environment.

BACKGROUND PROCESSES

There is no business application that does not require rule-based processes in the background. For example, if the user enters a contract status and a resubmission date in Contract Management and enables automatic notification, in the background a task must first be created in SharePoint. A timer job regularly monitors the task list and sends an e-mail with a notification when the date is reached. For certain types of tasks, individual access permissions are then set automatically, depending on contract status.

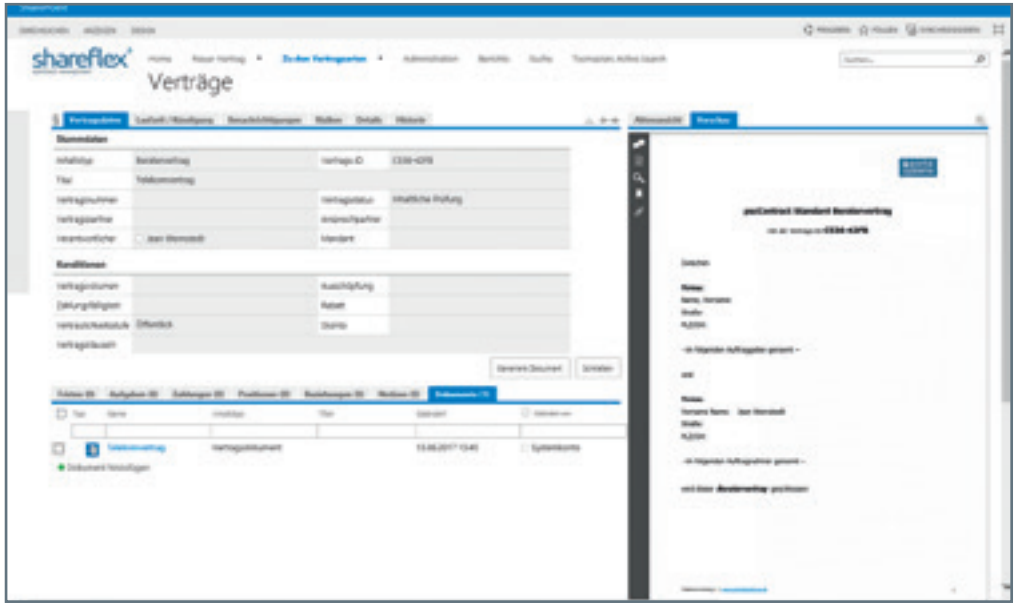
Definition is done in the Shareflex|rules component via an XML definition that can at any time be quickly and easily adapted to changed business requirements – with no programming required (no Visual Studio, no PowerShell, no WSPs). This is how even complex requirements can be easily implemented by SharePoint consultants and administrators with no programming skills.

WORKFLOWS

Unlike background processes, workflows are typically characterised by user interaction. Workflows still require background actions to automate certain processes. The Shareflex|flow component uses the Shareflex|forms and Shareflex|rules modules already provided in Shareflex to create user-friendly interfaces and to create and configure workflows. Using a Workflow editor, workflow forms and processes are defined on the basis of a state machine.

You can use the Shareflex|flow component to automate your workflow processes without having to purchase a separate workflow engine such as Nintex or K2. The advantages are that by default Shareflex already provides all of the building blocks for a powerful workflow engine and also provides all of the building blocks for creating the business applications for the workflow.

The Shareflex|flow component is part of Shareflex and every Shareflex solution and does not have to be licensed separately.



Workflow mask for contract review

PERMISSIONS

The Shareflex|permissions component can be used to extend SharePoint-based business applications to include user and role concepts.

Shareflex|permissions provides an easy to use Permissions editor that can be used to define roles, users, permissions groups, complex sets of permissions rules and simple static permissions rules. The module is automatically part of every Shareflex|solution and all of the applications created by the user using Shareflex.

The Permissions editor can, for example, be used to set metadata-dependent permissions and define permissions profiles.

Permissions editor

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ADD-ONS

AUDIT-PROOF ARCHIVING

The Shareflex|archive add-on adds audit-proof archiving of documents of all kinds to SharePoint-based business applications. SharePoint documents can be archived manually or according to freely definable rules. Archiving typically takes place on storage systems such as NetApp, EMC or Hitachi systems. Azure storage or existing RAID systems can also be integrated using Grau Data's FileLock technology.

Storage of the documents on the storage systems is audited by KPMG and documented in an audit opinion. All archived documents can be displayed again directly in Shareflex applications in SharePoint and can at any time be integrated into any processes and workflows.

Are you already using an ECM, DMS, or archive system?

No problem, it can also be integrated into your existing archiving system such as Saperion, easy or d.3ecm. If you want to store the outgoing documents from your ERP systems to be audit-proof, we provide predefined and ERP manufacturer-certified interfaces for Microsoft Dynamics NAV, AX, CRM and Dynamics 365 as well as for SAP.

OUTLOOK INTEGRATION

Business applications created with Shareflex integrate seamlessly into Outlook via the user-friendly Shareflex|outlook sidebar.

Business objects and their contents can be searched for and displayed directly in Outlook. E-mails, attachments and documents from file servers can be easily assigned to business objects using drag and drop in Outlook.

It is also possible to forward documents by e-mail directly via Shareflex|outlook. The users of the business application always remain within their familiar working environment.

Outlook integration

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REPORTING

The Shareflex|reports add-on gives you all the options for analysing all of the lists and document libraries created in SharePoint and displaying them in charts or lists.

These reports can at any time be adapted to meet your individual needs. New reports and analyses can also be added to the system. Just the way you want and what your business demands.

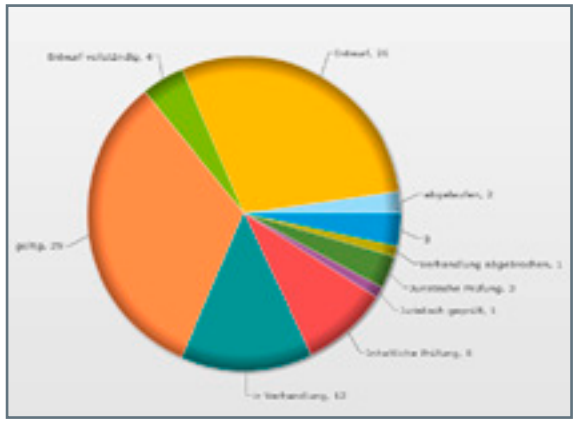
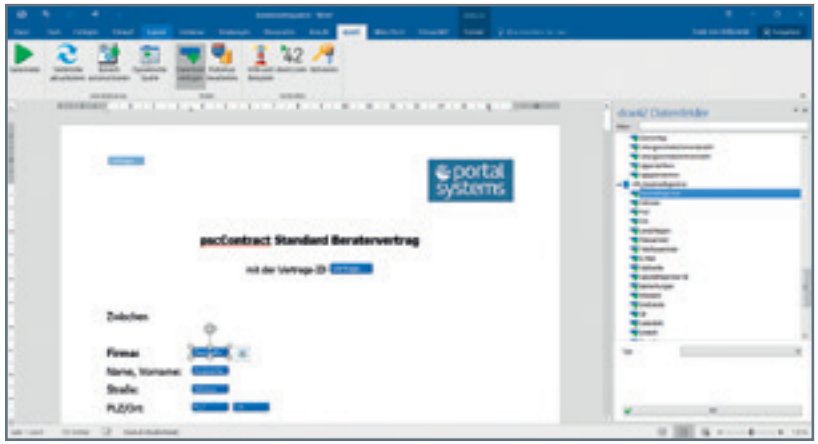


Diagram display

AUTOMATIC DOCUMENT GENERATION

The Shareflex|docgen add-on module enables Shareflex to automatically generate documents from templates. Data can be directly imported from metadata in the contract file, stored text components, or from data on third-party systems.

In addition to interfaces for common ERP systems such as SAP or Microsoft Dynamics AX, NAV, CRM and Dynamics 365, we also provide the option of connecting any type of external databases. Definition is very easy and can be done directly from Microsoft Word, for example.



ERP INTEGRATION/MASTER DATA ADJUSTMENT

The Shareflex|platform, integrated add-ons and our solutions fit seamlessly into your SharePoint 2013, 2016 and Office 365/SharePoint Online environment.

Master and transaction data can be easily and securely reconciled with your ERP, FIBU, or inventory management systems.

Standardised interfaces are available for the SAP, Microsoft Dynamics AX, NAV, CRM and Dynamics 365 systems.

CONCLUSION

Shareflex gives you a platform enabling you to quickly and easily create integrated solutions for SharePoint-based business applications.

The integrated add-ons add important and necessary components to Shareflex. As the responsible product manufacturer we, Portal Systems AG, ensure the proper integration of these add-ons.

Ready-made solutions based on Shareflex and the appropriate add-ons are deployed either directly by us as the product manufacturer or by certified partners. Our product portfolio currently comprises solutions for the management of contracts, quality, audits, personnel and incoming invoices.

In addition, there are a large number of templates, most developed as part of projects, based on best-practice examples. Examples of these are supplier, meeting, contact and fleet management.

Shareflex and the ready-to-go solutions based on it are now being successfully used by more than 150 customers. From a large medium-sized company to a company listed on the German DAX exchange, many of our customers have been relying on our solutions for years. This long-term trust is our incentive for consistently high quality and at the same time the best testament to the reliability and stability of Shareflex.

That's why we believe Shareflex is the solution that can make SharePoint an even more attractive platform for your company's business applications. And it doesn't matter whether you use SharePoint On-Premises, Office 365/SharePoint Online or hybrid scenarios.

Convince yourself and ask us your questions. We look forward to hearing from you.

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