

Features Any Good Workflow Software Should Provide

Role-based access control

Every Workflow Management System should allow customizing what each user can see and edit. In that way, different roles and responsibilities in the company will have different type and scope of access to the tool.

This feature allows all work-related files to be saved and edited. A cloud-based documentation application has capabilities of storage and changes and also some provide chat option between users and team members.

Full reporting and analytics

To be a workflow system effective, it should provide a high level of reporting and analytics. Reports help decision making and optimization of resources.

The flexibility of workflow patterns

The system should give you the possibility to tailor a process to your needs. You should be able to model workflows in a variety of ways.

Easy and quick workflow setup

It is great if the system provides drag & drop Workflow Editor. The setup should be intuitive and simple and shouldn't require a consultant to help you through it.

Notifications

The workflow tool you're searching for should have the ability to remind all users (mostly via e-mail) and to notify them of upcoming dates, made changes, updated features, approvals, progress, steps and etc.

Integration with other systems

Your workflow process does not exist independently of other business processes and you need to synchronize your projects and activities. The best workflow management software integrate seamlessly with systems like Quickbooks, Salesforce, Google Calendar, Freshbooks, Xero and etc.

Graphical representation and visualization

Graphical interface makes complete sense of the business processes and allows you to see the overall picture in a clearer way. Good workflow management systems should provide graphical simplicity.