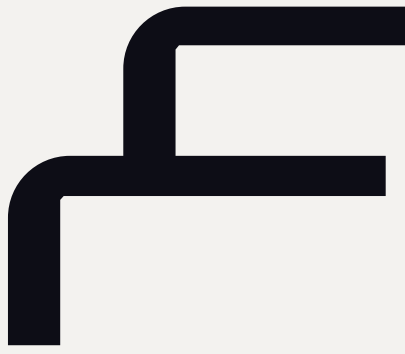


# Integrations and Data Flow

Automating data entry  
and user management



Flowcase is a proposal automation solution that helps manage your CVs, resumes, and case studies to save time, win more bids and get better results.

Flowcase is continuously improved with new features and APIs. Make sure you follow our [updates](#), and feel free to sign up for our [newsletter](#).

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# 1 Flowcase within your ecosystem

Flowcase is designed to integrate seamlessly with your existing enterprise applications, whether they are in-house planning tools or comprehensive HCM/ERP suites. This integration helps avoid duplicate data entry and manual user management, strengthening the overall business case.

## Key findings

Enterprises gather relevant data for Flowcase from various systems, including ERP, HRM, HCM, financial, and planning tools. However, this data may not always match the required language or tone for external use, such as CVs, resumes, and case studies tailored for bids and proposals. Additionally, the data may not always align perfectly with the structure needed in Flowcase.

Flowcase facilitates the export and integration of data, allowing it to be combined with other information in BI dashboards, synced to CMS/web platforms, or merged into larger proposal documents.

## Recommendations

To get started, begin with the basics, such as implementing Single Sign-On and User Provisioning to ensure a smooth setup. Next, expand your efforts by syncing frequently updated data, such as Courses and Certifications, with a 1:1 match in resumes. Experiment with BI dashboards using Excel reports exported from Flowcase to gain valuable insights.

For a successful sync of project information to resumes or case studies, first establish clear mapping and filtering criteria. Additionally, leverage your existing in-house integration expertise or consult with current operations and integration suppliers to streamline the process.

## 2 Background

As enterprises become increasingly digital, some of the data you want to incorporate into Flowcase may already be captured within other systems and workflows. Integrating this data into Flowcase can help keep CVs, resumes, and case studies up-to-date, reduce duplicate data entry, and streamline workflows for employees. Furthermore, once data is enhanced and enriched within Flowcase, it can be beneficial to extract and share this data with other systems downstream.

Flowcase provides a RESTful JSON API, which is included in the subscription fee. Administrators can create and distribute API keys to developers and suppliers, with configurable access levels such as read-only.

## Considerations

### 1. Terminology

The language used in bid-winning CVs or resumes often differs from the brief descriptions found in finance systems. It's important to tailor the tone and structure of content in CVs and resumes to stand out in tenders and proposals.

### 2. Local languages

For public sector bids in non-English-speaking countries, local language content is often required. While Flowcase supports multiple languages, syncing English-only content may be less effective in these contexts.

### 3. One-too-many relationships

A single project or case study in Flowcase might correspond to multiple entries in a finance system due to various invoicing or agreement structures.

### 4. Filtering

Determine who should have access to Flowcase—whether it should be open to all employees or limited to specific divisions or roles. Consider whether to sync a large volume of projects or focus on high-quality reference projects.

# 3 The Basics

## Single Sign On (SSO)

Implementing Single Sign-On (SSO) is crucial for ensuring easy and secure access to Flowcase, enhancing the user experience and meeting security requirements. Flowcase supports SAML 2.0 and Google Login. You can configure SSO in Azure with a provided guide, and other SAML 2.0 compatible Identity Providers like Okta, ADFS, or Shibboleth are also supported.

Typically, integrations deactivate users on their departure day rather than immediate deletion. Combining this with Flowcase's compliance feature, which automatically deletes deactivated users after 3 months, ensures you can rectify any wrongful deactivations while remaining compliant with privacy regulations.

## User provisioning

Efficient management of user accounts—creating, updating, and deactivating them—is essential for compliance and security. Flowcase offers three options for automating user provisioning:

With Flowcase there are three options to achieve this automatically:

- 1. SCIM**  
This standard protocol allows user provisioning through Azure or other SCIM-compatible endpoints without custom integration code. Documentation is available for setup.
- 2. JSON/REST API**  
For complete control, you can develop a custom connector between your AD/HRM system and Flowcase to keep user accounts synchronized.
- 3. CSV over SFTP**  
Sending user information via a daily spreadsheet remains a practical option for some organizations, despite being considered a legacy method.
- 4. Filtering**  
Decide whether access to Flowcase should be granted to all employees or restricted to specific divisions or roles. Determine if you want to sync all past projects or focus on high-quality reference projects. Establish rules and exceptions for access and data sharing to align with your organizational needs and compliance requirements.

## 4 The quick wins

### Courses and certifications

If your LMS or HRM/ERP systems already capture data on courses and certifications, syncing this information with Flowcase can minimize duplicate data entry and streamline workflows. Typically, data such as course names, organizers, dates, and certification details (including end dates and certification numbers) can be synchronized using Flowcase's API. For examples or to access API documentation, contact us or refer to Chapter 9.

## 5 The extensions

### Document management

If CVs, resumes, and case studies in Flowcase are part of larger proposals that include additional information like company data or methodology chapters, Flowcase integrates with various document management tools.

Existing integrations include Word and PowerPoint plugins. For details on supported platforms and capabilities, reach out to [techsales@flowcase.com](mailto:techsales@flowcase.com).

### BI dashboards

To combine Flowcase data with information from financial and availability tools, use our reporting feature. Reports can be manually downloaded or automated through our API for more efficient data integration.

# Staffing and availability planning tools

While many clients use Flowcase data with BI Dashboards, we will soon offer an API for syncing availability data directly into Flowcase. This will enable you to filter for people with specific skills and experience. For more details and an updated timeline, contact [techsales@flowcase.com](mailto:techsales@flowcase.com).

# Image libraries

Flowcase supports updating and exporting CVs, resumes, and case studies in various high-quality formats. If you store images in an image library, we can explore integration options to maintain consistency. Reach out to [techsales@flowcase.com](mailto:techsales@flowcase.com) for more information.

# Website or CMS

To feature employee profiles or case studies on your website, use our API to extract data from Flowcase. Contact [techsales@flowcase.com](mailto:techsales@flowcase.com) for customized documentation and integration guidelines.

# Intranet

Leverage Flowcase data combined with our search API to enrich content on your intranet. You can link to detailed content in Flowcase directly from your intranet. For insights, read the Bouvet case study.

# Link directly

Generate direct links to a user's CV, resume, or case study in Flowcase using a standard URL pattern. For a guide on setting this up, contact [techsales@flowcase.com](mailto:techsales@flowcase.com).

# 6

# The advanced

## Customer information

Syncing customer data from your CRM system to Flowcase can enhance your process by ensuring accurate customer details for Reference Projects and improving suggestions when entering customer names in resumes.

This integration ensures that customer industries are correctly linked, enhancing the quality of your data.

However, syncing all customer data may lead to more noise than benefits. It's advisable to filter and sync only the most recent, largest, and relevant customers. Ensure that duplicates are consolidated and that the volume of data is manageable to maintain effective Customer Descriptions in Flowcase.

## Project information

Projects involve detailed structures in CVs, resumes, and case studies, including fields like client names, project details, industry, type, cost, contacts, and hours. Syncing this data can be complex, especially if project metadata updates over time.

To manage this, start by identifying the ideal project structure in Flowcase, then analyze what data is available and how it should be filtered and aggregated. Decide whether to sync data first to the Case Study/Reference Project module in Flowcase, from where it can be pushed to individual CVs, or directly to CVs and resumes. Be cautious of syncing too many projects to avoid creating more noise than value.

## Skills and competencies

Skills defined in your HRM system may differ from those in Flowcase, where they are used to showcase expertise in resumes and case studies. Flowcase often serves as the primary link between skills and projects, which may not directly match other systems' terminology.

For assistance with syncing skill data or creating a taxonomy that aligns with Flowcase, contact [techsales@flowcase.com](mailto:techsales@flowcase.com).

For more details on tracking skills and experiences, refer to our [resources](#).

## 7 The optional

### Work experiences and education

While crucial, work experiences and education change less frequently than project details and certifications. Thus, automating this data is generally less critical compared to more dynamic resume elements.

### Language skills

Resumes usually include only a few languages and proficiency levels. Given the minimal effort required to manually add this information, automating language skill updates may not be as cost-effective.

## 8 The automations

### Proposal APIs

Flowcase's core feature is its proposal automation. You can tailor resumes and case studies for proposals, and automate tasks such as creating proposals, copying documents, and downloading generated files. For further automation in your proposal workflow, Flowcase offers additional possibilities.

## 9 API documentation

You can find the Flowcase API documentation [here](#). For any questions about the APIs or documentation, please contact [techsupport@flowcase.com](mailto:techsupport@flowcase.com).

## 10 The future

### Comments and feedback

Flowcase will soon introduce a new feature allowing comments on specific sections. An API for this feature will also be available, offering new integration opportunities.

Contact [techsupport@flowcase.com](mailto:techsupport@flowcase.com) for detailed API documentation or access to a test environment.

For scheduling a discussion about your integration needs, reach out to [techsales@flowcase.com](mailto:techsales@flowcase.com).



Thank  
you for  
your time!