BUTTERFLY TaskFlow

WHITE PAPER · IN-HOUSE WORK MANAGEMENT

A controlled exit from work tracking.

In-house work management and process modernization: people and AI agents in the same workflow, with your own data, your own rules, on your own infrastructure.

89
projects moved on the same day

32,130
work items

34,112
time entries

8/8
measurements matched the source system exactly

EXECUTIVE SUMMARY

Work tracking is changing; control must stay in-house.

For years, enterprise work management was built around teams, task lists and manual approvals. Today AI agents produce part of the work as well, yet in most organizations tasks, requests, approvals and knowledge still live in different tools.

Butterfly TaskFlow runs project and task management, the service catalog, workflows, approvals, SLAs and AI-assisted operations in one system. People and AI agents become part of the same process, and all of them work under the same permission and audit rules.

This document explains how a controlled move from an existing work tracking tool to TaskFlow is carried out: what is migrated, what is rebuilt, how integrations are preserved and how the migration is closed with measurement. It is based on the migration in which RG Labs moved its own work tracking system to TaskFlow in a single day.

IN THIS DOCUMENT

- Why work management needs to change
- TaskFlow capabilities: service catalog and portal, Workflow Studio, natural language queries, approval chains, SLA
- The numbers from our own migration and the 8/8 verification
- A four-step migration method, API compatibility and limits stated up front
- On-premise and air-gapped deployment for regulated organizations, certificates

OUTCOME

One system. One permission model. Full traceability.

THE SITUATION

Work has changed. Work management must change too.

More tools, more integrations, less control.

The fragmented structure of traditional ITSM and work management tools cannot keep up with the pace of today's work. A purchase request is opened in the work tracking tool; when the amount goes up, a second approval is needed; when an order is created in the ERP, the request record is expected to be updated. Over the years fields, rules, add-ons and connections pile up.

When a tool change is discussed, two questions come up: **"Will the records come over?"** and, more importantly, **"How will this work move forward on Monday morning?"**

Why TaskFlow?

Fast migration with zero loss

Move project history, tickets and permissions from your current tools without interruption.

Native, integrated AI

Run AI not as an external chat tool but as a process step that categorizes tickets, anticipates SLA risks and triggers approvals.

No more hidden license costs

Use RPA, integration and approval chains with the platform's own capabilities, without depending on dozens of add-ons.

Enterprise flexibility and full control

Design multi-step approval chains and complex cross-department flows in Workflow Studio without drowning in code.

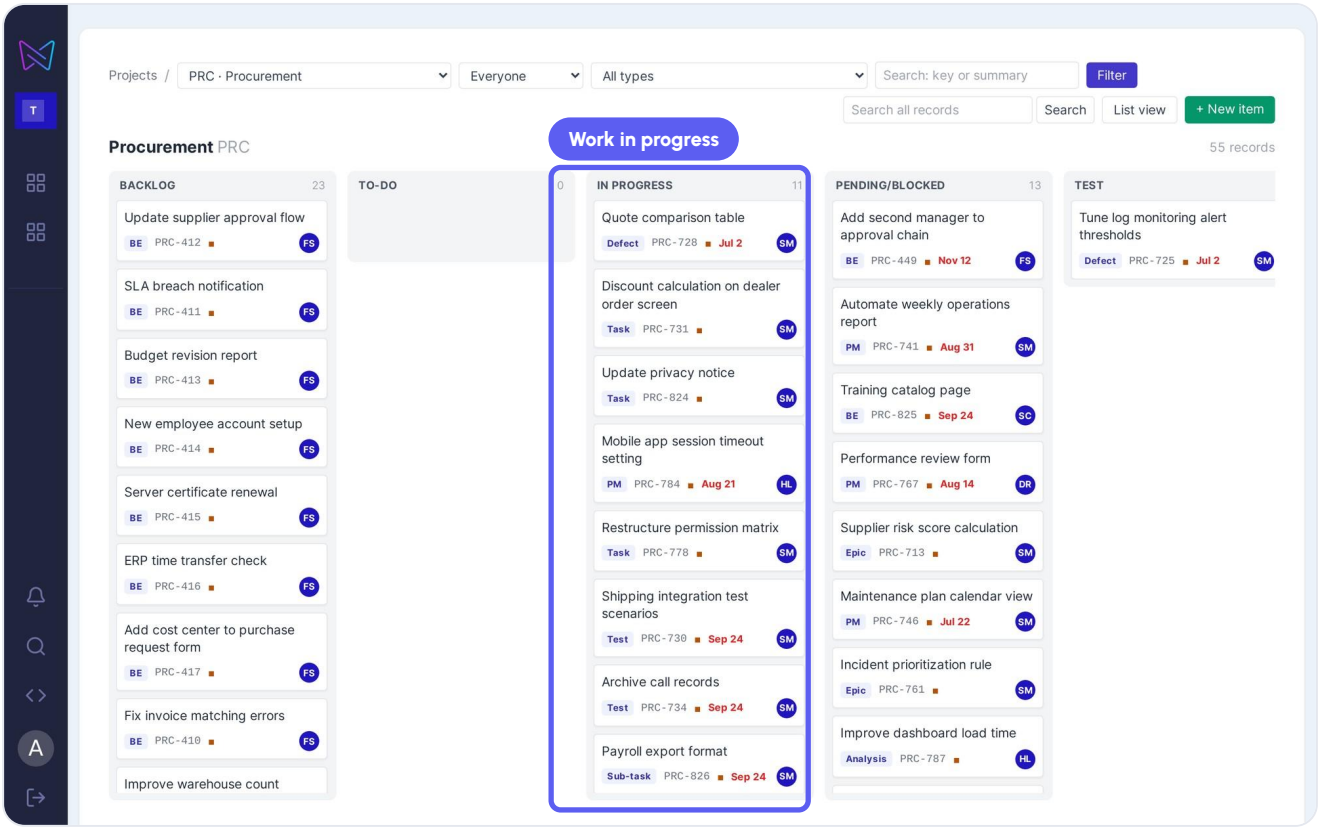
THE ANSWER

TaskFlow creates a shared workspace for human and AI teams. Project and task management, the service catalog, workflows, approvals, SLAs and AI-assisted operations run in the same system.

PLATFORM

One platform. End-to-end work management.

Butterfly TaskFlow does more than track tasks; it manages the whole process of enterprise work, from start to completion, on a single structure.



Board. Work items in status columns; each card shows type, key, priority, due date and assignee.

Service catalog and portal

Turn requests into structured work through defined services instead of e-mail.

Workflow Studio

Design statuses, transitions and rules around how you work; build them quickly with AI.

Natural language queries

Ask in your own language; TaskFlow answers from your data.

Approval chains

Manage multi-step, parallel and conditional approvals in a single flow.

Delegation and SLA

Delegation of authority, additional approvers, working calendars and SLA rules.

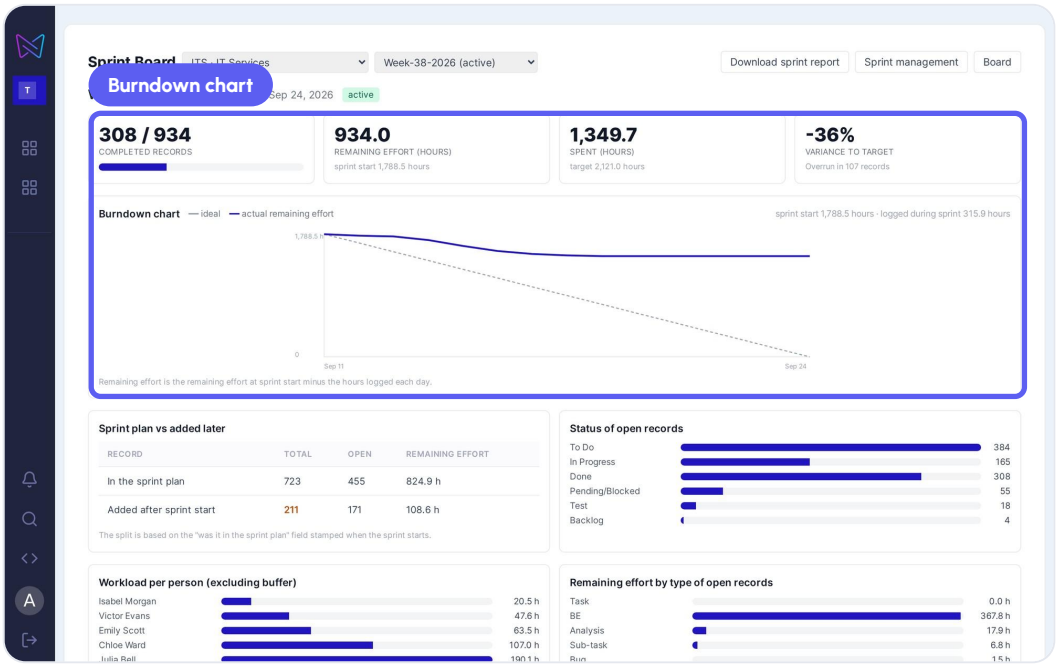
Daily work tracking

Boards, sprints, saved filters, capacity planning, roadmap and an automatic sprint closing report.

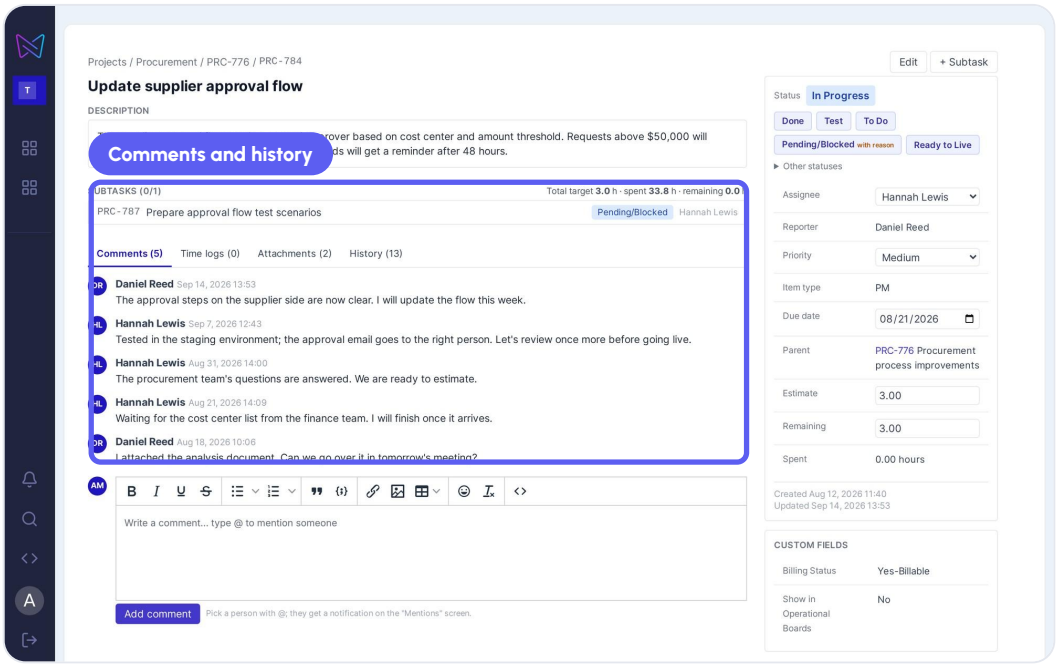
FROM THE SCREENS

Daily work tracking continues in the same place.

Teams follow the sprint, the history of each item and the remaining effort in the same system. The screens below are taken from our own TaskFlow installation.



Sprint board. Completed items, remaining and spent effort, variance against target and a burndown chart.



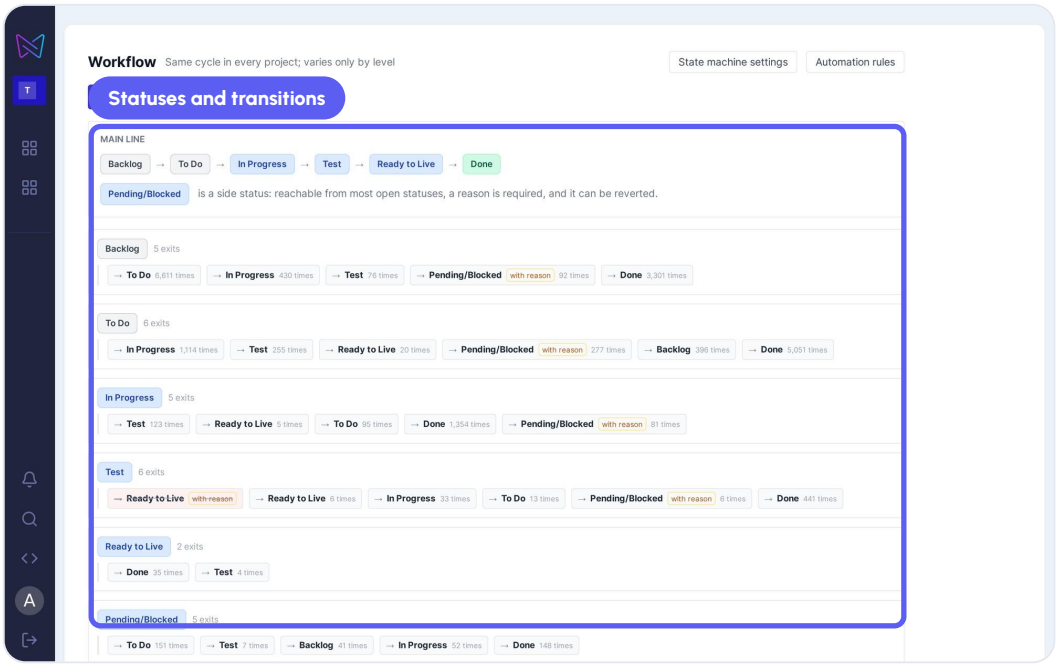
Work item detail. Description, subtasks, comments, time entries, attachments and change history; status, assignee and effort fields on the right.

Project, item and person names have been replaced with sample data; the numbers are the system's real values.

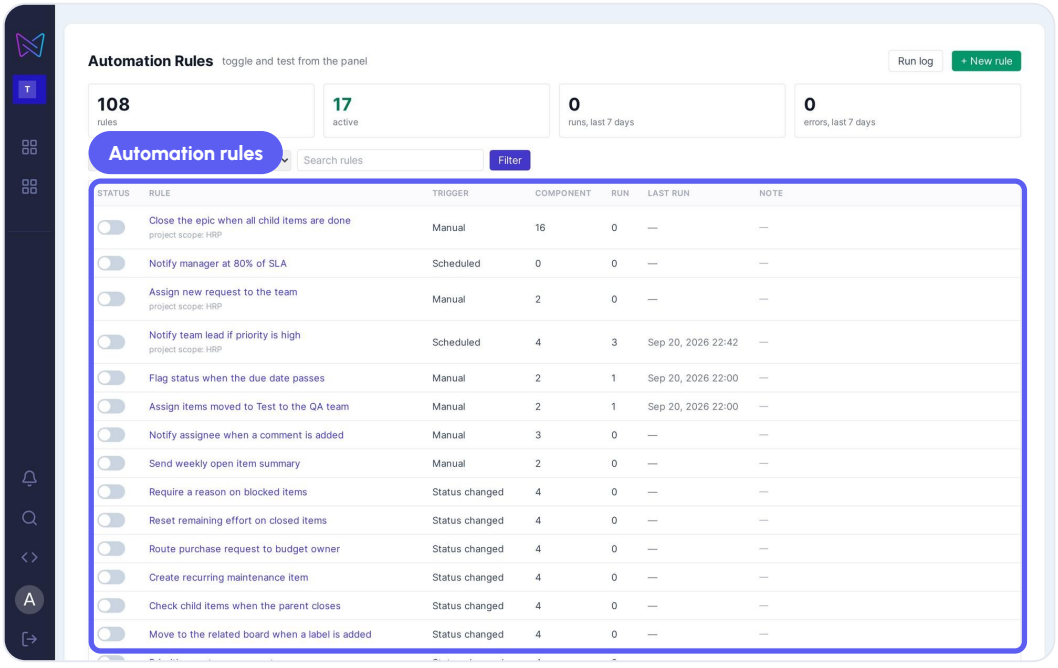
WORKFLOW AND AUTOMATION

Rules run in the process engine.

Statuses and transitions are defined in the platform's workflow engine; recurring work is tied to automation rules and every run is recorded.



Workflow. The transitions allowed from each status; a reason is mandatory when work is put on hold.



Automation rules. 108 rules were migrated; trigger, number of components, number of runs and last run in a single table.

ENTERPRISE TRUST

Enterprise work management requires enterprise trust.

TaskFlow brings deployment, workflow, AI and audit together under a single governance model.

Deployment

On-premise, private cloud and air-gapped deployment. Runs on your own infrastructure.

Approval and SLA

Multi-step approvals, parallel and conditional flows, delegation and additional approvers, working calendars and SLA.

Workflow

Workflow Studio, state machine, status and transition rules; assignment, priority, labels.

AI

Model-independent architecture, natural language queries, task summaries, AI-assisted reporting.

Integration

Butterfly iPaaS, integrated workflow and RPA, enterprise integrations; connection to communication tools.

Permissions and audit

Role-based access, audit trail, traceability of human and AI steps.

Existing integrations: same API, new address

TaskFlow provides an interface that works with the same paths and parameters as the REST APIs of common work tracking tools: REST API v2 and v3, agile board and sprint endpoints, service desk endpoints. Webhooks are sent signed (HMAC). Authentication uses e-mail and an API key or a personal access token. In most cases, scripts and reporting connections that use the supported endpoints keep working once only the address and access key are changed.

FROM THE FIELD

In our own migration we moved 89 projects in one day.

The RG Labs team that builds Butterfly moved its entire work tracking tool to TaskFlow on the same day. Since then 27 people have worked in TaskFlow every day.

89	32,130	11,190	34,112
projects	work items	comments	time entries
667,864	**9,109**	**133**	**119**
change history records	attachments	sprints	saved filters

The migration was closed with measurement.

Once the move was complete, eight measurements were placed side by side with the source system. All eight matched exactly.

MEASUREMENT	SOURCE SYSTEM	TASKFLOW
Items in the active sprint	**934**	**934**
Subtasks	**721**	**721**
Open work	**428**	**428**
Work on hold	**54**	**54**
Effort breakdowns (4 measurements)	**exact match**	**exact match**

- The 48 features the team actually used in the source tool were compared one by one: 43 are ready, 3 are partly ready and 2 are out of scope.
- The migration was closed with a quality control report of 69 tests.
- The workflow runs in the platform's process engine: 11 statuses, 46 transitions; a reason is mandatory when work is put on hold, and the cause is asked for when effort is exceeded.

MIGRATION METHOD

Before migrating, decide how each part will be handled.

1. **Take a usage inventory**
   Identify projects, fields, filters, automations, add-ons and the API endpoints actually in use.

2. **Move records and ways of working**
   Transfer the work items, comments, attachments and change history included in the migration scope. Handle the boards, sprints and filters teams use separately in the migration plan.

3. **Verify integrations**
   Scripts and reporting connections that use supported API endpoints can keep working once the address and access key are updated. Webhooks and critical integrations are tested with your own scenarios before the migration.

4. **Manage workflows in Butterfly**
   Define approval steps, hold reasons and closing rules in the process engine. The sprint closing report shows which reason recurs most often.

LIMITS ARE STATED UP FRONT

- Marketplace add-ons do not come over one to one; the functions actually used are identified and the ones needed are rebuilt on Butterfly.
- In-app OAuth 2.0 (3LO) connections are not supported; authentication uses an API key or a personal access token.
- Which features come over one to one, which will be rebuilt and which stay out of scope are listed in writing before the migration.

Migration time depends on record volume, workflows and existing integrations. These three topics are assessed together in the first evaluation.

REGULATED ORGANIZATIONS

With your own data. With your own rules. On your own infrastructure.

In areas such as the public sector and its affiliates, banking and insurance, the defense industry and manufacturing, keeping work records in-house is often not a choice but a requirement.

On-premise deployment

TaskFlow runs on the organization's own servers; the organization decides where data resides.

Private cloud

In a cloud environment dedicated to the organization, with the same permission and audit model.

Air-gapped network

A deployment option that can run in environments closed to the internet.

The same platform as your processes

Work tracking runs on the same Butterfly platform as purchasing, maintenance and approval processes.

Certificates

CERTIFICATE	SCOPE
ISO/IEC 27001:2022	Information security management system
ISO 9001:2015	Quality management system
Domestic Product Certificate (Yerli Malı Belgesi)	Business process management software (Butterfly), 100% domestic content, class A, high technology
Technological Product Certificate	Butterfly DXP, Ministry of Industry and Technology of the Republic of Türkiye

All certificates and verification links: butterfly.dev/en/kurumsal/sertifikalar

FREQUENTLY ASKED QUESTIONS

Short answers about TaskFlow.

Will our existing integrations keep working?

For integrations that use the supported endpoints, changing the address and access key may be enough. API version, authentication and webhook usage are verified one by one from the inventory.

Which records are migrated?

Projects, work items, comments, attachments, time entries, sprints, boards and change history can be included in the migration scope. In our own migration, 89 projects and 32,130 work items were moved on the same day.

What happens to the add-ons we use?

Marketplace add-ons are not transferred directly. The add-on functions actually in use are identified, and the ones needed are considered for rebuilding on Butterfly.

Can it be deployed on-premise?

There are on-premise, private cloud and air-gapped options. The deployment model is assessed together with your integrations and infrastructure requirements.

How long does a migration take?

It depends on record volume, workflows and existing integrations. In the first evaluation we decide which parts will be migrated, which will be rebuilt and which will stay out of scope.

WE CAN BUILD IT TOGETHER IN A POC

- Your own service catalog and request types
- Your own approval flow and SLA rules
- An AI-assisted workflow running on real requests
- Workflows and a seamless move from legacy tools

Let's start the migration plan with your most critical workflow.

Let's review a purchasing, maintenance or approval process together and decide which records will be migrated, which connections will be tested and which rules will be rebuilt in Butterfly.

Let's assess your migration scope · butterfly.dev