

13. Workflow

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1. Overview

Overview:

Workflow is a systematic business activity which automates different processes to complete specific tasks in a specific period.

Key elements of describing a workflow process in business include:

1. Configure User Roles: To define the Personas involved the flow.
2. Module Settings: Module based configuration also should be completed before creating Workflow.

2. Workflow Dashboard

Workflow Dashboard:

Workflow dashboard displays the list of Workflows built by the developers. Below are the details displayed in a dynamic table.

The screenshot shows a web application interface for a workflow dashboard. The URL is dev-app.asseto.ai/workflow/list. The page title is 'Workflow'. There are several UI elements highlighted with red boxes and numbers 1 through 6:

- 1: Workflow Name column
- 2: Module Name column
- 3: Status column
- 4: Latest Version column
- 5: New Workflow button
- 6: Total 27 records found summary bar

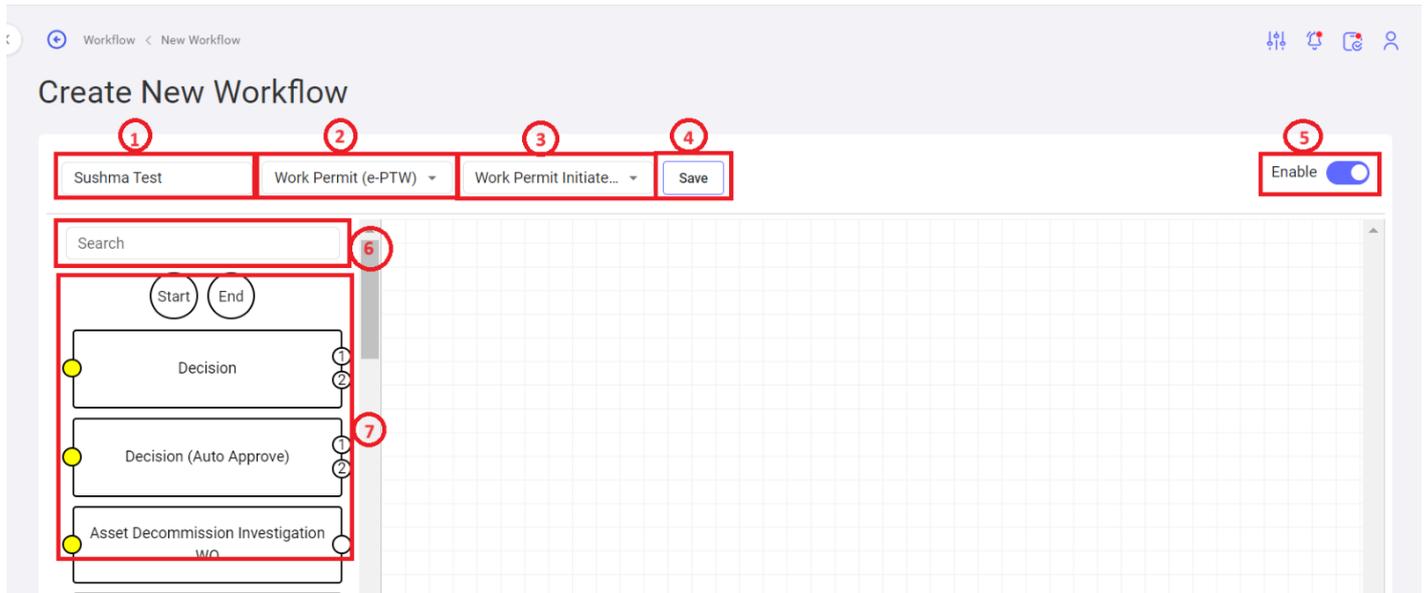
Workflow Name	Module Name	Status	Latest Version
WP Reactivation initiated	WORK PERMIT	Active	1
WP Termination	WORK PERMIT	Active	1
WP Initiation	WORK PERMIT	Active	1
Request Work Order Feedback	WORK ORDER	Active	74
Agent Approval Work flow	AGENT	Inactive	21
Buddy	WORK ORDER	Active	51
Asset Approval before Create	ASSET	Inactive	34
After Inventory created send email.	INVENTORY	Active	26
Inventory Approval before create	INVENTORY	Inactive	13
WO auto creation	CASE	Active	4

1. **Workflow Name:** Name of the Workflow.
2. **Module Name:** Name of the module for which the workflow is built. The modules are Asset, Inventory, Workorder, Case, Agent, Work Permit (e-PTW).
3. **Status:** To describe the status of the Workflow, whether active or inactive.
4. **Latest Version:** The Version of the Workflow available in the list.
5. **New Workflow:** To build a New Workflow.
6. **Total records:** To show the total records of Workflow.

3. Create New Workflow

Create New Workflow:

Create new workflow option on a Workflow dashboard will direct to the below page. Below are the different parameters for creating the new workflow.



1. **Workflow Name:** User with the right permission ex: Super-admin, who creates the workflow can define a unique name.
2. **Select Module:** User can select the module from the drop-down list for which the Workflow needs to be built. Modules available in the list are:
 1. Asset
 2. Inventory
 3. Workorder
 4. Case
 5. Agent
 6. Work Permit.
3. **Select the Trigger:** There are different triggers configured based on each module. Ex: Asset Module: Asset Approval before create, Asset health status update (IOT), After new asset created, Asset decommission initiated.
4. **Save:** To save the Workflow which is built.
5. **Enable Toggle:** To enable or disable the Workflow.
6. **Search:** To search specific tasks.
7. **Task List:** Display pre-configured list of tasks. These can be dragged and dropped to use.

Workflow Creation Process:

To create a Workflow, User is given a flexibility to drag & drop the pre built tasks with certain parameters within that. Click on to the specific task view the parameters involved in it. Parameters will differ from task to task. Based on the specific tasks, the user can key in the inputs. Start and End are mandatory tasks to be selected. If the User tries to save the Workflow built with Start & End task, the error will be thrown. After building a proper Workflow, User can save by clicking on to the Save icon.

