~Workflows

Overview

The **Workflows** module allows users to create and manage structured workflows.

A workflow can contain:

- Tasks
- Content
- Stages
- Inputs
- Triggers
- Templates
- Database Columns
- Input Forms
- Input Orders
- Access
- Models
- Display

Recommended Workflow Creation Flow

Excel Planning
↓
Create Workflow
↓
Create Stages
↓
Create Database Columns
↓
Create Inputs
↓
Create Input Forms
↓
Add Questions
↓
Configure Input Order

↓
Configure Access
↓
Configure Config / Models / Display
↓
Configure Triggers
↓
Configure Templates
↓
Test Workflow
↓
Publish Workflow

Workflow Planning Using Excel

Before creating the workflow in the application, prepare an Excel planning sheet.

The Excel sheet should be used as the master planning document for the complete workflow.

Recommended Excel Columns

Column	Description
Workflow Name	Name of the workflow
Stage Order	Sequence of the stage
Stage Name	Name of the workflow stage
Input Name	Name of the required input
Question	Question displayed to the user
Question Type	Type of question/input
Database Column	Database column where the response is stored
Mandatory	Whether the field is mandatory
Input Order	Sequence of questions
Access	User/role having access
Trigger	Trigger required for the workflow
Trigger Condition	Condition for the trigger
Action	Action to be performed
Template	PDF/Email template requirement
Expected Result	Expected workflow behavior

Column	Description
Remarks	Additional information

Create a New Workflow

Navigation

Left Sidebar → Add-ons → Workflows → Add New

Steps

1. Open **Workflows**.
2. Click **Add New**.
3. Enter the workflow name in the **Title** field.
4. Click **Save**.
5. Open the newly created workflow.

Fields

Field	Description
Title	Name of the workflow
Save	Creates the workflow
Close	Cancels the operation

Workflow Configuration

After creating a workflow, the following sections are available:

- Tasks
- Content
- Stages
- Inputs
- Triggers
- Templates

1. Content Sections

- Manage
- Creator
- Database Column
- Config
- Models

- Access
- Input Forms
- Input Orders
- Display

Create Workflow Stages

Stages define the different steps or phases of a workflow.

Navigation

Workflow → Stages → Add New

Steps

1. Open **Stages**.
2. Click **Add New**.
3. Enter the stage name.
4. Click **Save**.
5. Repeat the process for all required stages.

Example

- Stage 1: Employee Details
- Stage 2: Request Details
- Stage 3: Manager Approval
- Stage 4: Final Approval
- Stage 5: Completed

Workflow Stage List

Field	Description
#	Stage serial number
Title	Stage name
Updated At	Date and time when the stage was last updated
Published	Publication status
Closed	Indicates whether the stage is closed
Action	Available actions

Create Database Columns

Database columns define where workflow information and form responses are stored.

Navigation

Workflow → Content → Database Column

Steps

1. Open **Database Column**.
2. Review the Excel planning sheet.
3. Identify all required data fields.
4. Create the required database columns.
5. Use meaningful and unique column names.
6. Map the relevant form inputs/questions to the appropriate database columns.

Example

Form Field	Database Column
Employee Name	employee_name
Employee ID	employee_id
Department	department
Request Type	request_type
Description	description
Approval Status	approval_status

Recommended Naming Convention

Use simple and consistent database column names.

- `employee_name`
- `employee_id`
- `department`
- `request_type`
- `description`
- `approval_status`
- `created_date`
- `updated_date`

Create Workflow Inputs

Inputs define the information that needs to be collected during the workflow.

Navigation

Workflow → Inputs → Add New

Steps

1. Open **Inputs**.
2. Click **Add New**.
3. Enter the input title.
4. Click **Add**.
5. Repeat the process for all required inputs.

Example

- Employee Name
- Employee ID
- Department
- Request Type
- Description
- Approval Status

Workflow Inputs List

Field	Description
#	Input serial number
Title	Input name
Updated At	Date and time when the input was last updated
Published	Publication status
Action	Available actions

Create Input Forms

Input Forms are used to present inputs and questions to users.

Navigation

Workflow → Content → Input Forms

Steps

1. Open **Input Forms**.

2. Create the required form.
3. Add the required inputs/questions.
4. Configure each question.
5. Set mandatory or optional fields.
6. Map questions to the appropriate inputs.
7. Map responses to the relevant database columns.
8. Save the form.

Add Questions to Input Forms

After creating the form, add questions according to the Excel planning sheet.

Employee Details Form

1. Enter Employee Name
2. Enter Employee ID
3. Select Department

Request Details Form

1. Select Request Type
2. Enter Description

Approval Form

1. Select Approval Status
2. Enter Approval Comments

Question Configuration

Property	Purpose
Question	Text displayed to the user
Input	Associated workflow input
Type	Type of response
Required	Makes the question mandatory
Database Column	Stores the response
Default Value	Optional predefined value
Display	Controls visibility

Configure Input Order

Input Orders control the sequence in which inputs/questions are displayed.

Navigation

Workflow → Content → Input Orders

Steps

1. Open **Input Orders**.
2. Select the required inputs/questions.
3. Arrange them according to the Excel planning sheet.
4. Verify the sequence.
5. Save the configuration.

Example

1. Employee Name
2. Employee ID
3. Department
4. Request Type
5. Description
6. Approval Status

Configure Access

Access controls determine which users or roles can access the workflow and its components.

Navigation

Workflow → Content → Access

Steps

1. Open **Access**.
2. Identify the required users or roles.
3. Assign the required access.
4. Configure permissions according to the workflow requirements.
5. Save the configuration.
6. Verify access using the appropriate user/role.

Example

Stage	User/Role	Access
Employee Details	Employee	Create/Edit
Request Details	Employee	Create/Edit

Stage	User/Role	Access
Manager Approval	Manager	Review/Approve
Final Approval	Admin	Review/Approve
Completed	Employee	View

Manage Workflow

The **Manage** section is used to update workflow information and publication status.

Navigation

Workflow → Content → Manage

Manage Title

1. Open **Manage**.
2. Enter or update the workflow title.
3. Click **Save**.

Publication Status

The workflow publication status is displayed in the Manage section.

The workflow should normally be published only after configuration and testing are completed.

Config

The **Config** section is used for workflow-specific configuration.

Navigation

Workflow → Content → Config

Steps

1. Open **Config**.
2. Review the available configuration options.
3. Configure the required settings.
4. Save the configuration.
5. Verify the configuration during testing.

Models

The **Models** section is used to configure the models/data structures required by the workflow.

Navigation

Workflow → Content → Models

Steps

1. Open **Models**.
2. Review the available models.
3. Configure the required model/data structure.
4. Save the configuration.
5. Verify the model during workflow testing.

Display

The **Display** section controls how workflow information is presented.

Navigation

Workflow → Content → Display

Steps

1. Open **Display**.
2. Configure the required display settings.
3. Save the configuration.
4. Verify the displayed information during testing.

Configure Triggers

Triggers are used to automate workflow behavior based on conditions or events.

Navigation

Workflow → Triggers → Add New

Steps

1. Open **Triggers**.
2. Click **Add New**.
3. Enter the trigger title.

4. Configure **Watchers**.
5. Configure **Events**.
6. Configure the **IF Condition**.
7. Configure the required **Action**.
8. Click **Add**.

Configure Trigger Watchers

Watchers define which workflow component the trigger monitors.

Steps

1. Open the **Watchers** section.
2. Select the required workflow component.
3. Click **Add More +** if additional watchers are required.
4. Add all required watchers.
5. Verify the selected watchers.

Configure Trigger Events

Events define what should happen when a trigger condition is satisfied.

Click **Add More Event +** to add additional events.

Each event contains:

IF Condition → Action

Configure IF Condition

The IF condition contains the following fields:

Field	Description
Select	Select the condition source
Choose Data	Select the data to evaluate
Choose Op	Select the comparison operator

Example

IF Status = Approved

The available options depend on the workflow configuration.

Configure Trigger Action

After configuring the condition, configure the required action.

Field	Description
Action Type	Defines the action to perform
Enable	Enables or disables the selected action

Additional options may include:

- Delete Action
- Delete Event
- Add More Event

Templates

Templates are used when the workflow requires generated documents or automated emails.

Navigation

Workflow → Templates

Available sections:

- Configuration
- PDF Template
- Email Template

Template Configuration

The Configuration section allows you to configure the workflow timezone.

Navigation

Workflow → Templates → Configuration

Timezone

1. Open the **Timezone** dropdown.
2. Select the required timezone.
3. Click **Update**.
4. Verify the configured timezone.

Create PDF Template

PDF templates can be created when the workflow requires PDF documents.

Navigation

Workflow → Templates → PDF Template → Add New

Steps

1. Open **PDF Template**.
2. Click **Add New**.
3. Configure the template according to the workflow requirements.
4. Add the required workflow data/content.
5. Save the template.
6. Test PDF generation.
7. Verify the generated PDF.

Create Email Template

Email templates can be configured for automated workflow communication.

Navigation

Workflow → Templates → Email Template → Add New

Steps

1. Open **Email Template**.
2. Click **Add New**.
3. Configure the email template.
4. Add the required content/data.
5. Save the template.
6. Test the email functionality.
7. Verify the generated email.

Tasks

The **Tasks** section allows users to view and manage workflow tasks.

Task Filters

Select Stage

Use **Select Stage** to filter tasks according to a specific workflow stage.

Select Type

Tasks can be filtered by:

- Live
- Test

Task List

The task table contains the following fields:

Field	Description
ID	Unique task identifier
Download	Download option where available
Type	Live or Test
Title	Task title
Workflow Stage	Associated workflow stage
User Name	Associated user name
User Email	Associated user email
User Phone	Associated user phone
Created	Task creation date and time
Updated	Last update date and time

Task Actions

Available actions include:

- Refresh
- Export
- Search

- Show Entries

Workflow Testing

Before publishing the workflow, perform complete functional testing.

Testing Flow

Create Test Task
↓
Start Workflow
↓
Verify Stage 1
↓
Submit Form
↓
Verify Database Data
↓
Move to Next Stage
↓
Verify Access
↓
Verify Trigger
↓
Verify Notifications/Templates
↓
Complete Workflow

Workflow Testing Checklist

Test Area	Verification
Workflow	Workflow created successfully
Workflow Title	Correct workflow name
Stages	All required stages created
Stage Order	Correct stage sequence
Inputs	All required inputs created
Input Forms	Forms created correctly
Questions	All required questions added
Question Type	Correct question/input type

Test Area	Verification
Mandatory Fields	Required fields working correctly
Database Columns	Responses stored correctly
Input Order	Questions displayed in correct order
Access	Correct users/roles have access
Config	Configuration works correctly
Models	Required models work correctly
Display	Data is displayed correctly
Triggers	Conditions and actions work correctly
PDF Template	PDF generated correctly
Email Template	Email generated/sent correctly
Tasks	Test tasks work correctly
Publication	Correct publication status

Publish Workflow

The workflow should be published only after successful testing.

Pre-Publication Checklist

- ☐ Workflow Name Verified
- ☐ All Stages Created
- ☐ Stage Sequence Verified
- ☐ Database Columns Created
- ☐ Inputs Created
- ☐ Input Forms Created
- ☐ Questions Added
- ☐ Question Types Verified
- ☐ Mandatory Fields Verified
- ☐ Input Order Verified
- ☐ Access Configured
- ☐ Config Verified
- ☐ Models Verified
- ☐ Display Verified

- [ ] Triggers Configured
- [ ] Triggers Tested
- [ ] PDF Template Tested
- [ ] Email Template Tested
- [ ] Test Tasks Completed
- [ ] Database Data Verified
- [ ] Access Verified
- [ ] Final Workflow Review Completed

After all checks are completed, publish the workflow.

Complete End-to-End Workflow

The complete workflow creation process is:

1. Prepare Excel Planning Sheet
2. Create Workflow
3. Create Workflow Stages
4. Create Database Columns
5. Create Workflow Inputs
6. Create Input Forms
7. Add Questions
8. Configure Input Order
9. Configure Access
10. Configure Config
11. Configure Models
12. Configure Display
13. Configure Triggers
14. Configure Templates
15. Create Test Task
16. Test Complete Workflow
17. Verify Database Data
18. Verify Access
19. Verify Triggers
20. Publish Workflow

Quick Reference

Step	Module	Action

1	Excel	Plan complete workflow
2	Workflows	Create workflow
3	Stages	Create workflow stages
4	Database Column	Create database columns
5	Inputs	Create workflow inputs
6	Input Forms	Create input forms
7	Input Forms	Add questions
8	Input Orders	Arrange questions
9	Access	Assign permissions
10	Config	Configure workflow
11	Models	Configure models
12	Display	Configure display
13	Triggers	Configure automation
14	Templates	Configure PDF/Email
15	Tasks	Create test task
16	Testing	Test complete workflow
17	Manage	Publish workflow

Final Workflow Structure

Workflow

- Planning
  - Excel Master Sheet
- Workflow
  - Workflow Title
- Tasks
  - Live
  - Test
- Content
  - Manage
  - Creator
  - Database Column
  - Config
  - Models
  - Access
  - Input Forms

    - Input Orders
    - Display
- Stages
    - Stage 1
    - Stage 2
    - Stage 3
    - Stage 4
    - ...
- Inputs
    - Input 1
    - Input 2
    - Input 3
    - ...
- Triggers
    - Watchers
    - Events
        - IF Condition
        - Action
- Templates
    - Configuration
        - Timezone
    - PDF Template
    - Email Template

Recommended Implementation Rule

The **Excel Master Sheet should always be prepared first**.

The workflow should then be configured in the following order:

PLAN → CREATE → CONFIGURE → MAP → GIVE ACCESS → AUTOMATE → TEST → PUBLISH

This sequence helps maintain consistency between the planned workflow and the actual application configuration and reduces configuration errors.

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