Workflow Execution

1. Create New Workflow:

* User will provide the workflow name and the no. of steps.
* And also he can add the step description with step numbers by clicking the “Add Steps” button.
* One pop up will come with specify the step description, step no.
* All provided data will be save in the “WorkflowMaster” database table.

Create new Workflow

Number of Steps \*

Workflow Name \*

Cancel

Save

Add Steps

Database Table “WorkflowMaster” removed ClientID



1. Define the steps rule

* Get the workflowsteps as stepCount.
* Set the level of steps for approval as per Role.
* Set the last step number as the last level of approval
* These data will be save in the table “WorkflowSteps”

Examples:

1. Leave Request Approval Workflow

User A -----Apply Leave-----Leave Request Form -------Email Trigger to Manager----Manager-----Approve/Reject via Email with comments-----Email Trigger to HR---- Approve/Reject via Email with comments -----Trigger an Approve/Reject Email to User

1. Expense Approval Workflow

* Employee raised the expense request.
* Supervisor validates the request and approves/rejects on basis of justification and/or eligibility.
* Employee may give the justification for the expenses and send to his/her supervisor for approval and further processing.
* Multiple approvals may require depending up on the request type.
* Approved request would go to different departments for further processing.
* Finally the request may go to finance for approval.
* Request would go to procurement and further processing

1. Issue Tracking Workflow

* Issue request will raised by the User.
* Assigned to the Supervisor for approve/Reject the request depends on the issue type.
* Multiple approvals may be require.
* Approved issue request will transfer to appropriate user Fix/resolve.

Form 2:

Workflow Steps Details

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| ID | WorkflowId | UserId | Steps Level | Steps Title | Allocated Time(in day) | Status | Created On | Created By | Updated On | Updated By |
| 1 | 1 | 4 | Level1 | 1Step1 | 1 | Approved |  |  |  |  |
| 2 | 1 | 4 | Level2 | 1Step2 | 1 | Pending |  |  |  |  |
| 3 | 1 | 4 | Level3 | 1Step3 | 1 | Null |  |  |  |  |
| 4 | 1 | 2 | Level1 | 1Step1 | 1 | Reject |  |  |  |  |

1. Approval process

* The approval process goes from level 1 to higher level as per the role mapping from the table “UserRoles”
* The table “TaskStepUsers” contains the details for approval required for the respective workflow.
* This table also contains the current step number.
* The IsApproved field is maintain in the table for which we want to have the approval process.
* The above procedure continues till the last level of approval.

Scenarios

* The approval process will skip the level if the current role is lower than the approval.
* If the request get rejected in higher level then it should be goes down one level and the Approver can send the rejection with justification/comments to the request creator.
* Again the user send the request with validating the justification for approval.

Approver Form:

Table “TaskStepUsers” This table will contain both the Transactions and history details.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| TaskId | WorkflowStepId | Start Date | End  Date | Status | Created On | Created By | Updated On | Updated BY |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| IsApproved | Approved By | Approved On | Comments | OnRejectSendToStep | Escalation time |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |