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BW

Workflow Management Application

TECHNICAL AND COMMERCIAL OVERVIEW

A platform for organising, executing and tracking business processes involving team members, steps and information. The proposed solution enables configuration of workflow types (Business Workflow – BW), then manages individual processes and tasks assigned to users.

What the application offers

- Visible steps and responsibilities. Each process is tracked through tasks assigned to users, with notifications and access to relevant information.
- Data and documents together. Process fields, attached files, and task history are accessible within the same workflow.
- Controlled execution. Validation, progression rules, suspension, and auditing support consistent application of the workflow model.

Example of use

When reviewing a request for quotation, teams can enter and check the information required to prepare a quotation, pass tasks between roles, and track the request through to completion. The same framework can support other processes once the relevant workflow has been modelled and implemented.

How it works

A BW describes the steps needed to achieve an objective. A workflow instance (BW Process) represents a specific case, such as a request to review a quotation or prepare a delivery. Within the instance, users carry out tasks (BW Tasks) and enter the information required by the model.

Stage	What happens
1. Modelling	The author defines the workflow according to the BPMN 2.0 standard, including its steps and execution rules.
2. Implementation	The workflow definition is installed in the application so that users can use it.
3. Managing execution	Users create processes, enter data, and perform assigned tasks. The application manages their state and progression between steps.
4. Reporting and auditing	Users monitor process status, history, and completed processes.

The application covers process and task management and reporting. Each workflow is modelled and implemented separately by its author.

What a workflow model can configure

- **Process data.** Fields specific to the workflow are completed by users or retrieved from external systems, as appropriate.
- **Task data.** Fields specific to each activity, such as an estimated price and comments during cost analysis.
- **Execution rules.** Complex validation and conditions for progression between nodes, defined in the workflow model.
- **Access and notifications.** Users allowed to access functions and people notified about subsequent tasks.

Process and task capabilities

Managing processes

- **Creating a BW instance.** The user selects an available workflow type and completes the process fields defined in the model.
- **Data entry and synchronisation.** The application can validate fields and populate or resynchronise information from connected systems, such as SAP, depending on the configured integration.
- **Related documents.** Files can be uploaded and downloaded at process level, maintaining their link to the request.
- **Controlled suspension.** The process can be suspended by selecting a reason, and its suspended state is audited.

Executing tasks

- **Assignment and notification.** When preparing subsequent tasks, the user selects the people who will receive an email notification.
- **Access directly from email.** The notification includes a link to the task to be performed.
- **Dynamic forms.** The fields displayed for each task are generated according to the model, and validation is applied before the process advances.
- **Task-level files.** Documents can be attached to an activity and viewed by authorised users.
- **Context and history.** Depending on access rights, users can view process data, its files, and previously completed tasks.

Execution control

Rules defined in the model can impose progression conditions, including relationships between parallel steps and restrictions on users continuing the process. Access rights determine which information each user can view or modify.

Example workflow for the delivery process

Zoom in within the application for details

