
WorkfloPlus
DEVELOPED BY INT0WARE
WorkfloPlus with Integration Tools
INT0WARE

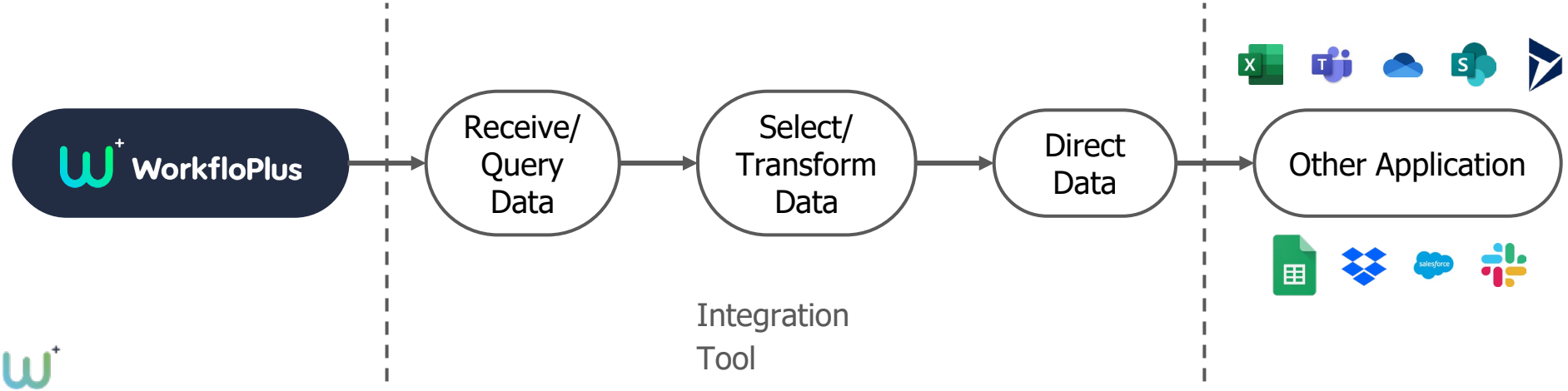
Introduction

It is rare that our customers want to use WorkfloPlus entirely in isolation; the activities carried out using WorkfloPlus probably form part of some wider business processes and a really common desire for users is to automate the flow of data out of WorkfloPlus either for the purpose of storing that data or to trigger some downstream action. Some example scenarios might include:

- Sending an email report to the repairs team whenever an inspection flags an issue
- Storing captured images and videos in online file share (Dropbox, OneDrive, Sharepoint)
- Writing a row of data to an online spreadsheet (Google Sheet, Excel Office 365 online)
- Writing a message to communication tool with the results of a stock check (Teams, Slack)
- Updating a CRM customer record when an activity is completed (Salesforce, Dynamics)
- When an escalation is raised sending the information to a supervisor (SMS, Email)

Integration Tools

Some software tools may include direct connectors to other tools but in most cases another tool will be required to sit in between WorkfloPlus and the application you require data to be sent to. A specialist integration tool will include out of the box connectors for many different applications along with more generic apps and functions, these can be configured, connected up and deployed in order to automate the required data flow. Additionally using one of these tools allows you to specify business logic (e.g. only send this on if an issue was found) within the integration layer.



Integration Tools

The best tool for a given scenario depends on your stack (techy speak for the other applications you are using), your budget and the scale of your operations. A few of the best known are shown below and of these we typically work with Zapier and Power Automate (formerly Microsoft Flow).

zapier

tray.io

IFTTT

Power Automate

integromat

TIBCO CLOUD™ Integration

Integration with WorkfloPlus

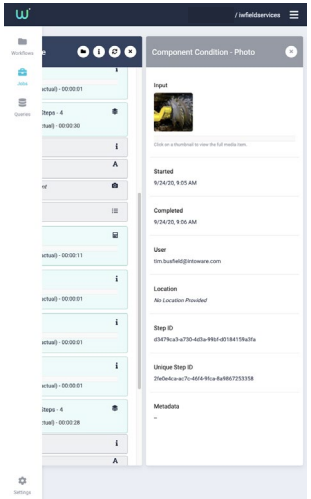
Currently the approach for integrating one of these tools with WorkfloPlus is to use one of the generic http request / web hook connectors in one of the following modes

1. Create an endpoint in the integration tool and then create an Http Trigger in WorkfloPlus that is directed at that endpoint, WorkfloPlus will then send data to that endpoint whenever a job is completed
2. Create a scheduled web request in the integration tool that runs a GraphQL query to get any new data since the last run

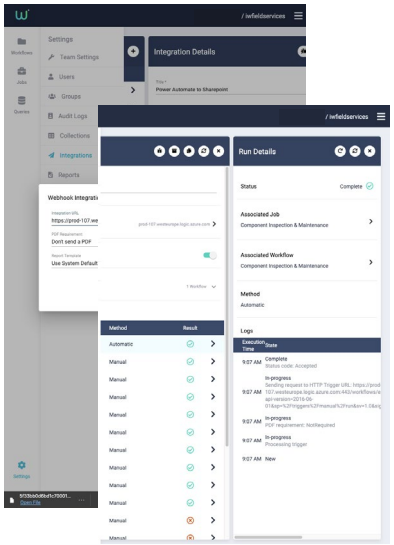
In the future we may add specialised WorkfloPlus apps into both Zapier and Power Automate, these apps would make it much more straightforward to work with the WorkfloPlus data in those tools.

Example: WorkloPlus Attachments to Sharepoint via Power Automate

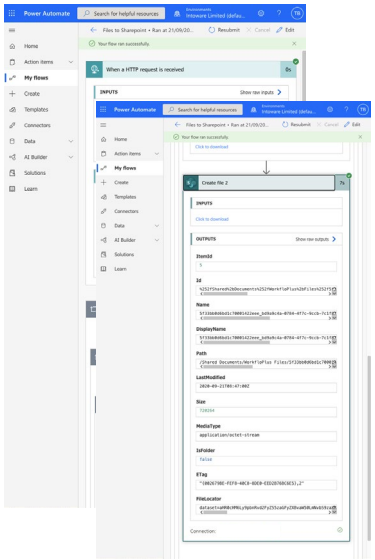
Job is completed, image captured and uploaded



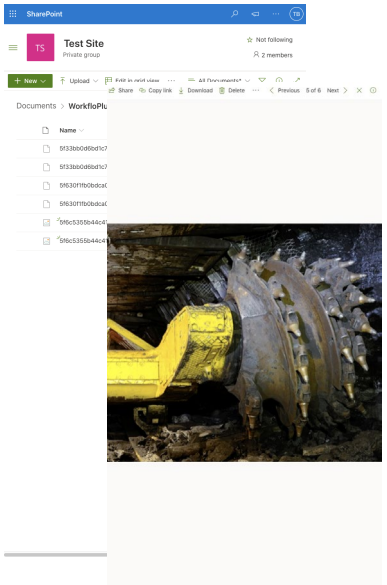
Http Trigger configured for Workflow, data directed to Power Automate Flow



Power Automate Flow receives data from WorkfloPlus, downloads images and sends them to Sharepoint



Sharepoint receives images from latest job



WorkfloPlus → Power Automate → SharePoint

Automation & Integration Scenario

A company uses a mixture of their own technicians and contracted technicians for routine inspection and maintenance. The technicians are instructed to escalate findings if certain readings are outside of the normal operating range, this is sometimes adhered to but at other times it is not, either because technicians have missed the instruction or have intended to at the end of the job but have then forgotten or because the escalation route has failed. At other times it is escalated but a delay has meant that the underlying issue has become much worse.

Within a tool like Zapier or Power Automate an Automation can be created that will read values from certain steps as soon as the job is completed and synced and compare them with the normal operating range, if it finds that the value is outside the normal range it can send the information on via SMS or Email to a predefined list of phone numbers or email addresses so that the issue can be looked at immediately. In addition the data could be automatically sent to the company ticketing system and from there tracked and updated internally.

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