



ORYELE DOCUMENTATION

Workflow Engine

Model, automate, and monitor any business process with the Oryele visual workflow builder.

This guide covers building workflows from scratch, writing conditional logic for complex scenarios, setting up human approval gates, and monitoring running processes in real time.

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Building Your First Workflow

The Oryele workflow builder uses a visual canvas where each node represents a step in a business process. Steps can trigger actions, evaluate conditions, send communications, or wait for human input.

Step 1: Create a New Workflow

- Go to Workflow Engine > Workflows and click New Workflow.
- Give it a descriptive name (e.g., New Client Onboarding) and assign it to a department.
- Choose a trigger: Manual Start, Schedule, Inbound Communication, or API Event.
- Set the default assignee (a digital worker or a human team member).

Step 2: Add Steps to the Canvas

- Click the + button on the canvas to insert a new step.
- Choose from step types: Action, Condition, Communication, Wait, Human Handoff, or Sub-Workflow.
- Configure each step by clicking it and completing the step properties panel on the right.
- Connect steps by dragging from one node's output port to the next node's input port.

Step 3: Configure Actions

- Action steps perform operations: create a task, update a record, send a file, or call an API.
- Each action type exposes a configuration form. Fill in required fields and use merge tags for dynamic values.
- Test individual actions using the Test This Step button before wiring them into the full flow.
- Actions can be chained sequentially or run in parallel using Split and Merge nodes.

Step 4: Publish and Assign

- Click Validate to check for disconnected nodes or missing required fields.
- Review the validation summary and resolve any errors flagged.
- Click Publish to make the workflow available to digital workers and triggers.
- Assign the workflow to one or more digital workers from the workflow's Assignments tab.

Tip

Start with the simplest version of a workflow that covers the happy path. Add exception handling, conditions, and branching after the core flow is validated and running in production.

Rules and Conditional Logic

Condition nodes let you model decision points inside a workflow. Oryele evaluates conditions against live data at runtime and routes the process along the correct branch.

Adding a Condition Node

- Insert a Condition step and open the Rule Builder.
- Choose a data source: workflow variables, trigger payload fields, or integration data.
- Select an operator (equals, contains, greater than, is empty, matches regex, etc.).
- Set the comparison value or reference another field using the merge tag picker.
- Add additional clauses with AND or OR logic to build compound rules.

Branching Outcomes

- Each condition node produces at least two output paths: True and False.
- You can add additional branches using multi-condition routing (switch-style logic).
- Each branch connects independently to the next step appropriate for that outcome.
- Use a Merge node downstream to re-join branches that converge before continuing.

Scenario	Condition	True Branch	False Branch
New vs. returning client	client.status == 'new'	Send Welcome Packet	Send Returning Client Update
Overdue document	days_outstanding > 7	Escalate to Manager	Send Reminder Email
High-value engagement	engagement.value >= 25000	Route to Senior Partner	Standard Assignment

Best Practice

Keep individual condition nodes simple (one decision per node). Complex multi-clause logic is harder to debug. Chain simple condition nodes in sequence rather than building deeply nested compound rules.

Human-in-the-Loop Steps

Not every step in a business process should be fully automated. Oryele's Human Handoff step pauses a workflow and routes it to a designated person for review, approval, or action before continuing.

Configuring an Approval Gate

- Insert a Human Handoff step at the point where human review is required.
- Choose the handoff type: Approve/Reject, Free-Form Action, or Information Only.
- Assign the step to a specific user, a role, or let the workflow pick based on context.
- Set a due date or SLA timer. When the timer expires, the workflow auto-escalates.
- Write the task description the assignee will see in their Oryele inbox.

Completing a Handoff Task

- Assignees receive a notification via their preferred channel (email, SMS, or in-app).
- Clicking the notification opens the task detail view with full workflow context.
- The assignee reviews the information, takes the required action, and clicks Submit.
- The workflow resumes automatically with the result of the human action captured as a variable.

Handling Timeouts

- Define a timeout duration on the Human Handoff step (e.g., 24 hours).
- Choose a timeout action: Escalate to a different user, Skip the step, or Abort the workflow.
- Timeout events are logged in the audit trail with the original assignee and elapsed time.
- Review timeout frequency in Analytics to identify bottlenecks in your approval process.

Workflow Monitoring

The Workflow Dashboard gives you real-time visibility into every running, completed, and failed workflow instance.

Dashboard Overview

- The Workflow Dashboard is accessible from the main navigation under Workflow Engine > Monitor.
- The default view shows all active instances sorted by start time.
- Filter by workflow name, assignee, status (running, paused, completed, failed), or date range.
- Click any instance to open the Instance Detail view showing a live map of progress.

Alerts and Notifications

- Set thresholds on any workflow to trigger an alert when runtime exceeds expectations.
- Alerts can be delivered via email, SMS, or in-app notification.
- Critical failures generate an automatic alert to the workflow owner with a full error trace.
- Configure alert recipients per workflow in the workflow settings panel.

Insight

Use the Analytics view alongside the Monitor dashboard. Monitor shows you what is happening right now. Analytics shows you patterns over time including average completion duration, bottleneck steps, and error frequency by workflow type.