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Delivering Experiences

# Workosphere – Form Generator & Workflow Automation Platform

"Whether you want to build workflows on your own or prefer a fully managed solution — Workosphere has you covered."

Add a subheWorkosphere is a powerful, no-code platform designed to help organizations build custom forms and workflow automation modules that can integrate with any SaaS-based or enterprise application. Whether you're in healthcare, HR, finance, government, or research, Workosphere empowers your team to automate, streamline, and scale their operations efficiently.

## Key Features

**Drag-and-Drop Form Builder**

**Custom Workflow Designer with Approval Matrices**

**Integration Ready with REST APIs & SaaS Platforms**

**Role-Based Access & Audit Logs**

**Template Library for Common Use Cases**

**Mobile-Friendly, Cloud-Based Platform**

## Benefits of Using Workosphere for Enterprises

### Rapid Module Development
Easily build tailored workflow modules such as expense management, asset tracking, or compliance workflows — without heavy coding or long development cycles.

### Seamless Integration with Existing Systems
Interface smoothly with SaaS-based or on-premise applications (e.g., payroll, HRMS, ERP), ensuring uninterrupted business continuity and efficient data synchronization.

### Dynamic Form Generation
Create intelligent, customizable forms with validation logic, conditional flows, and role-based access to suit a wide range of enterprise use cases.

### Workflow Automation & Control
Define, manage, and monitor complex workflows across departments with clear visibility, approval matrices, and audit trails.

### Scalability & Flexibility
Designed to grow with your business — scale across teams and processes without compromising on performance or security.

### Enhanced Productivity & Accuracy
Automate manual tasks, reduce paperwork, and minimize errors, leading to faster decision-making and improved operational efficiency.

### Improved Compliance & Governance
Maintain control with configurable rules, digital approvals, and detailed logs — ensuring policy adherence and regulatory compliance.

## Product Catalogue Offering

### DIY (Self - Service)

**For Whom : SEMs, IT Teams , Digital Champions**

**Features : Drag - and - Drop builder , Templates**

**Support : Community + Email Support**

**Pricing Model : Subscription - based (per used / module)**

**Onboarding : Guided onboarding , video tutorials**

**Flexibility : Moderate Customization**

# Why Workosphere Fits Across Domains

**_Low-code form builder_** :  Anyone can design domain-specific forms without deep technical knowledge.

**_Customizable workflows_**  :  Adapts to unique approval hierarchies and routing logic.

**_API-ready_**  : Can be integrated into existing ERP, CRM, HRMS, or custom-built solutions.

**_Secure & Auditable_**  : Role-based access, logs, and traceability ensure governance and compliance.

## DFY (Enterprise Customization)

**For Whom : Large Enterprises , Regulated Industries**

**Features : Consultation, Custom Design , Integration**

**Support : Dedicated Account Manager & SLA Support**

**Pricing Model : Project - Based + Annual  Maintenance Fee**

**Onboarding : Discovery workshops , UAT , Training**

**Flexibility : Full Workshop Control , Custom APIs**

# Workosphere - Use Case

Workosphere's workflow automation can be leveraged to manage multiple workflows or tasks in supply chain approvals—using the same flexible workflow engine and features:

## Configurable Workflow Matrix

Workosphere's core strength is its configurable workflow matrix, which allows you to define and automate the approval process for any supply chain task, such as:

- Purchase requisitions
- Vendor onboarding
- Inventory requests
- Goods inward/outward
- Payment approvals
- Logistics scheduling

Each of these can have its own set of steps, approvers, and conditions, but all are managed within the same unified workflow engine.

## Dynamic Form Generator for Diverse Tasks

- **Custom Forms:** Create a unique form for each supply chain task (e.g., a purchase order form, a vendor registration form, a goods receipt form) with relevant fields and validations.
- **Conditional Logic:** Show/hide fields or trigger sub-workflows based on form inputs (e.g., high-value orders may require extra approvals).

## Automated Routing & Task Assignment

- **Rule-Based Routing:** Automatically route each request to the correct approver(s) based on department, value, vendor, or urgency.
- **Parallel or Sequential Approvals:** Set up workflows for single or multiple approvals (e.g., finance and procurement must both approve high-value purchases).
- **Task Scheduler:** Assign, track, and remind responsible parties for each workflow step.

## Centralized Tracking & Real-Time Status

- **Unified Dashboard:** View all supply chain tasks (regardless of type) in one place, with status indicators for each step.
- **Audit Trails:** Every action (submission, approval, rejection, escalation) is logged for compliance and traceability.

## Role-Based Access & Security

- **Access Control:** Define who can initiate, approve, or view each workflow, ensuring sensitive supply chain data is protected.
- **Segregation of Duties:** Prevent conflicts of interest by ensuring no single user can complete all workflow steps.

## MIS Reports & Analytics

- **Cross-Workflow Reporting:** Generate reports across all supply chain workflows—see bottlenecks, approval times, and outstanding tasks by department, vendor, or product.
- **Custom Filters:** Slice data by workflow type, date, value, or status for granular analysis.

## Custom Modules & Integration

- **Modular Approach:** Add new supply chain workflows as your business grows—no need for separate systems.
- **Integration:** Sync with ERP, inventory, or accounting systems for seamless operations.

### Example: Multiple Supply Chain Workflows in Action

| Workflow Type | Steps/Approvals Involved | Example Approvers |
|---|---|---|
| Purchase Requisition | Initiation → Dept. Head → Procurement → Finance | Requester, Manager, Finance |
| Vendor Onboarding | Submission → Compliance → Procurement | Employee, Compliance, Procurement |
| Goods Inward | Entry → Quality Check → Inventory Update | Storekeeper, QA, Inventory |
| Payment Approval | Invoice Upload → Procurement → Finance | Procurement, Finance |

# Industries & Domains Where Workosphere Can Be Used

## Healthcare & Hospitals

- Patient admission & discharge workflows
- Medical leave and reimbursement requests
- Doctor/nurse duty rosters & shift management
- Equipment maintenance and request tracking
- Compliance forms and audit trails

## Medical, Pharmaceutical & Research

- Patient admission & discharge workflows
- Medical leave and reimbursement requests
- Doctor/nurse duty rosters & shift management
- Equipment maintenance and request tracking
- Compliance forms and audit trails

## Education & Academia

- Student admission and fee approval workflows
- Leave and attendance management for staff
- Faculty onboarding & credential verification
- Research project proposal and approval cycles
- Hostel room allotment and grievance handling

## Government & Public Sector

- File movement and digital approvals
- Citizen grievance redressal forms
- Scheme benefit application and tracking
- Permit/license issuance workflows
- Audit and RTI request processing

## Corporate & HR Operations

- Expense claims, travel request, and reimbursements
- Recruitment, onboarding & exit workflows
- Employee performance review cycles
- HR policy acknowledgment and digital sign-offs
- Learning & development tracking workflows

## Manufacturing & Supply Chain

- Material request and issue approvals
- Equipment calibration & maintenance tracking
- Supplier onboarding and quality inspections
- Safety incident reporting and resolution
- Production batch reporting and signoffs

## Finance & Accounting

- Invoice approval & payment authorization
- Budget allocation and spending workflows
- Tax form collection & processing
- Internal audit checklists and escalations
- Vendor due diligence workflows

## IT Services & SaaS Companies

- Client onboarding & SLA agreement workflows
- Support ticket escalation matrix
- Internal resource allocation & approval flows
- Product feature change request cycle
- Compliance and security audit workflows

## Legal & Compliance

- Contract creation, review, and approval
- Case file intake & workflow management
- Legal hold notifications and tracking
- Policy rollout and employee acknowledgment
- Risk assessment and compliance checks

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