Introduction

The Lease Notification workflow is used to notify the owners of leases that their leases are going to expire. During the configuration steps of the Asset Workflow Install, a setting was created that determines how far in advance an email will be sent. The default value is 30 days and can be changed in the Notification Server console. Navigate to Manage > Workflows. Then expand the tree control to Published Workflows > Dialog Workflows and select the Asset Process Settings.

Login with the Admin credentials to Process Manager.

After you login to Process Manager, you will step through the same configuration that was used during the installation. You will configure the following settings:
Workflow Server and Notification Server settings

Outbound Email server

Email Notification Settings

These are the email address where email notifications will be sent when a workflow sends task notifications.
Process Connection URLs.

These settings allow you to change which Workflow server you are using if you choose to move to a distributed environment.

Business Justification and Reason for Loss of Ownership categories
Lease Notification setting.

Enter the number of days prior to the lease expiring that an email will be sent to the lease owner.

Setup
To setup the Lease Notification workflow, you will need to use the following steps:
1. Create a lease in your NS that has a serial numbers in the covered hardware section of the lease.
2. Edit or create a computer and put the same serial number in the serial number field of the computer. This relationship using the serial numbers will allow you to see which assets are covered by the lease inside the Lease Notification Workflow.
3. Assign an owner/user to the lease.

Run the workflow
To run the Lease Notification workflow:
Method #1: Right click on one or more leases
1. Navigate to the Lease Schedule page
2. Select one or more leases.
3. Right click on one or more leases.
4. Select “Lease Notification” in the pop up menu
The lease owner will receive an email that the lease is about to expire if the expiration date is less than the Asset Process Setting for Lease Notification. A task in Process Manager will also be created for the lease owner where they can see the lease information and click on a link to view the lease in the NS.

Method #2: Create a scheduled Job / Task
1. Navigate to Manage > Jobs and Tasks
2. Create a new Task that is a “Call Web Service on Server” task type.
3. Enter a name for your task.
4. Fill in the URL with the correct path to the Lease Notification WSDL. For example: http://servername/AM.ScheduleLeaseWFServices/ScheduleLeaseWFServices.asmx?WSDL
5. Click the Load button to load the Web Service methods.

6. Verify that the Service Name is ScheduleLeaseWFServices
7. Verify that the Method Name is Execute (String)
8. Click the OK button to finish creating the task.
9. Click the New Schedule button to create a schedule for the new task.

Each time the workflow runs from a scheduled task, it will search for leases that are going to expire within the Asset Process Setting for Lease Notification (30 days). If the lease will expire, an email is sent to the lease owner and a task is created in Process Manager.