

Workflows and Agents: What Runs Today

Start with the operational result and choose the smallest workflow that delivers it. An interactive answer, a saved notification and a custom agent are different levels of implementation.

Job	Documented route	Boundary
Find when a unit was last seen	Interactive assistant query	A tool call retrieves an observation. It does not start ongoing monitoring.
Review activity or visit durations	Supported server-side analytics	Requires suitable records, scope and eligibility; incomplete visits remain distinct.
Tell me when a unit is observed again	Detection alert	Matches newly stored detections. Delivery is to your own verified account email.
Send a regular activity breakdown	Scheduled aggregate digest	Supports documented count metrics and schedules. It does not provide dwell or occupancy digests.
Update another system or perform a business action	Separately scoped workflow or agent	Availability, runtime, external access and approval policy must be agreed.

Example: find a trailer

“ Using SiteTrax.io, find the latest observation of trailer [complete identifier] at [project]. Show the recorded time and timezone, the project, the record link and any missing evidence.

Expected result: the last recorded observation and a way to check it. If there is no match, check the identifier, project access and time window before concluding the unit is absent.

Example: prepare a detection alert

“ Prepare a one-time alert for the next new detection of trailer [complete identifier] at [project], expiring in 30 days. Show the exact filter, recipient and expiry, then ask me to confirm before creating it.

Creating or cancelling a notification requires `sitetrax:notifications:write` in addition to read access. Listing notifications and delivery history uses read access. A saved notification ID confirms configuration; a delivery-history entry records dispatch status. Neither proves the email was read.

Example: scope an exception workflow

Design example, not a claim of an available packaged agent. Compare observed equipment with an expected list from a customer system, prepare an exception and route it to an operator for review. Agree the external source, identifier matching, freshness limit, approval step and destination before implementation.

What to specify for a custom workflow

Decision	Example
Trigger	New eligible observation, an agreed schedule, or an operator request.
Evidence	SiteTrax.io project, equipment family, time window and supporting records.
Business context	Expected list, contract or schedule supplied by an authorized system.
Action	Draft an exception for review, or an explicitly permitted system update.
Control	Who approves, what happens on missing evidence, and how duplicate actions are prevented.
Success measure	Time to answer, reviewed exceptions resolved, or time from observation to approved action.

For exact alert types, schedules, metrics and limits, use [Alerts and Scheduled Digests](#).