

# Advanced Workflow Metadata *Exposed*

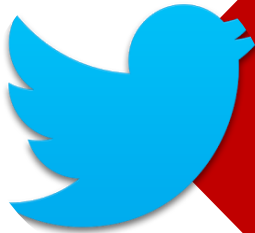
Sigrid Kok | Winshuttle



# Introduction



App – Winshuttle



#WUG2014 – Twitter



SSID – Winshuttle  
Password – wug2014



# Advanced Workflow Agenda

- Workflow Logic
- Winshuttle Controls
- Participant Resolvers
- Field Validation
- **Exposed! Process Metadata**
- Web Services
- Introduction to Composer



# Workflow Metadata



## Topics

- Data from Form
- Data from the Workflow Database
- Data from Workflow SharePoint Lists
- Workflow Dashboard... *Beta!*
- Tips

# Workflow Metadata



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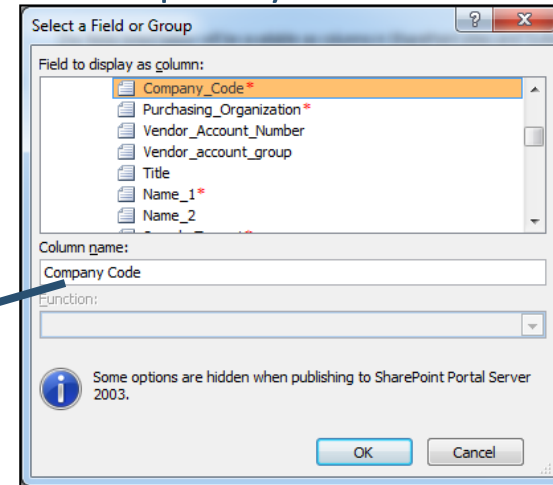
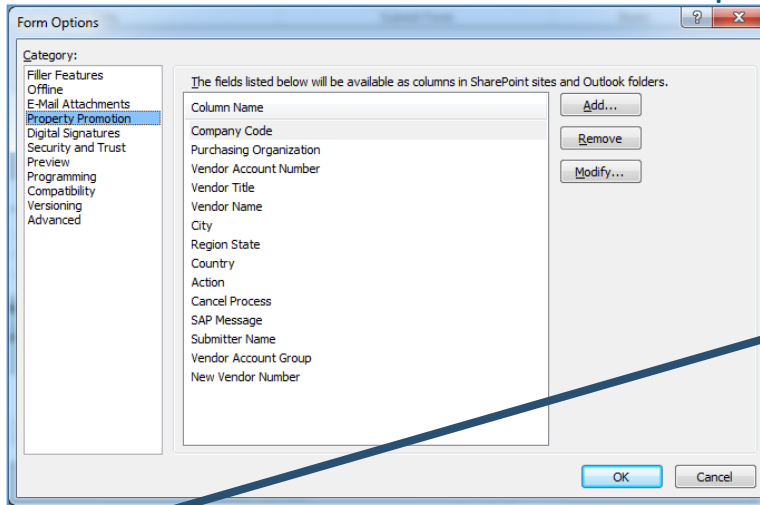


# Workflow Metadata – from the Form



## Data from the Form – Designer

- Promotion – expose form data to Process SP List
- File → Advanced Form Options → Property Promotion



Company Code	Purchasing Organization	Vendor Account Number	Vendor Title	Vendor Name	City	Region State	Country	Action	Cancel Process	SAP Message	Submitter Name	Vendor Account Group
1000	1000	0000004058	Company	SK New Vendor 456	San Francisco	CA	US	Copy	false		Sigrid Kok	0001



# Workflow Metadata – from the Form



## Data from the Form – Composer

- Promotion – expose form data to process SP List
  - Element Properties – Promote to SharePoint (Field)

General Settings		[-]
Name	Company_Code	
Binding	Company_Code ▼	
Element Type	TextBox ▼	
Required	True ▼	
Read Only	False ▼	
Max Characters	80	
Rules	(Collection) [...]	
Promote to SharePoint (Field) Company Code		



# Workflow Metadata



## Content

- Data from Form
- **Data from the Workflow Database**
- Data from Workflow SharePoint Lists
- Workflow Dashboard... *Beta!*
- Tips



# Workflow Metadata – from the Database



To create your own reports/dashboards:

- We recommend you do not run against the live workflow database
- We provide you a utility to clone the workflow database tables for a data source to create reports & dashboards from

# Workflow Metadata – from the Database



## Setup to Clone the Workflow Database Tables

- Create database – SQL script available for SQL Server

```
schema.sql - Notepad
File Edit Format View Help
CREATE TABLE [dbo].[Assignment] (
    [SVAssignmentId] [numeric](18, 0) NOT NULL,
    [Title] [nvarchar] (255) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
    [SVTaskName] [nvarchar] (255) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
    [SVTaskDescription] [nvarchar] (255) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
    [SVTaskDuration] [numeric](18, 0) NULL,
    [SVTaskType] [nvarchar] (255) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
    [SVSwimlane] [nvarchar] (255) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
    [SVFormView] [nvarchar] (255) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
    [SVAllowReassignment] [bit] NULL,
    [SVAllowAddToTeam] [bit] NULL,
    [SVAllowReplace] [bit] NULL,
    [SVAllowBulkApproval] [bit] NULL,
    [SVAllowEmailApproval] [bit] NULL,
    [SVRequireReview] [bit] NULL,
    [SVCommentRequirement] [nvarchar] (255) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
    [SVDefaultApprovalPeriod] [numeric](18, 0) NULL,
    [SVAssignedDate] [datetime] NULL,
    [SVDueDate] [datetime] NULL,
    [SVReviewDate] [datetime] NULL,
    [SVCompletionDate] [datetime] NULL,
    [SVUTCAssignedDate] [datetime] NULL,
    [SVUTCDueDate] [datetime] NULL,
    [SVUTCReviewDate] [datetime] NULL,
    [SVUTCCompletionDate] [datetime] NULL,
    [SVAssigneeLoginName] [nvarchar] (255) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
    [SVAssigneeFullName] [nvarchar] (255) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
    [SVAssigneeEmail] [nvarchar] (255) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
    [SVAssignmentStatus] [nvarchar] (255) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
    [SVAutoApproved] [bit] NULL,
    [SVComment] [nvarchar] (4000) COLLATE SQL_Latin1_General_CP1_CI_AS NULL,
    [SVProcessId] [numeric](18, 0) NULL
) ON [PRIMARY]
GO
```

- Can be adapted for other databases

<https://support.winshuttle.com/hc/en-us/articles/200333474-Exporting-Workflow-DataFirst>



# Workflow Metadata – from the Database



## Setup to Clone the Workflow Database Tables

- Configuration file to point to your database

```
<Export>
  <ConnectionString>Provider=sqloledb;Data Source=svdemo;Initial
Catalog=sharevis_reports;Integrated Security=SSPI;</ConnectionString>
  <FieldMaps>
    <FieldMap SharePointFieldName="MyTest" DatabaseFieldName="MyT2"/>
    <FieldMap SharePointFieldName="DocumentStatus" DatabaseFieldName="DS"/>
    <FieldMap SharePointFieldName="Division" DatabaseFieldName="Division"/>
  </FieldMaps>
</Export>
```

[\*\*WINSHUTTLE\*\*™](https://support.winshuttle.com/hc/en-us/articles/200333474-Exporting-Workflow-DataFirst>Create</a></p></div><div data-bbox=)

# Workflow Metadata – from the Database



## Clone the Workflow Database Tables

Run svadm command for Process & Assignment tables

- At a command prompt on your server, run the following command:  
`svadm -o updateprocessstatuslist -url <URL to the root site to export> -config <path to your database configuration file> -recurse`
- At a command prompt on your server, run the following command:  
`svadm -o updateassignmentstatuslist -url <URL to the root site to export> -config <path to your database configuration file> -recurse`

<https://support.winshuttle.com/hc/en-us/articles/200333474-Exporting-Workflow-DataFirst>

# Workflow Metadata – from the Database

## Data from the Database

- Table WFProcess

Name	ID	CreationDate	DueDate	DefName	DefId	Originator	CompletionDate
Material Creation - Material Creation 11/5/2012 11:...	38	2012-11-05 19:12:57.693	2012-11-06 19:12:57.693	Material Creation	82	AD2008R2\wsuser1	2012-11-05 19:12:57.693
Material Creation - Material Creation 11/5/2012 11:...	39	2012-11-05 19:39:04.220	2012-11-06 19:39:04.220	Material Creation	82	AD2008R2\wsuser1	NULL
Material Creation - Material Creation 11/5/2012 2:2...	40	2012-11-05 22:29:11.807	2012-11-06 22:29:11.807	Material Creation	83	AD2008R2\wsuser1	2012-11-05 22:29:11.807
Material Creation - Material Creation Request on 20...	41	2012-11-05 23:13:48.367	2012-11-06 23:13:48.367	Material Creation	84	AD2008R2\wsuser1	2012-11-05 23:13:48.367
Material Creation - Material Creation Request on 20...	42	2012-11-08 21:47:47.077	2012-11-09 21:47:47.077	Material Creation	88	AD2008R2\wsuser1	2012-11-08 21:47:47.077
Material Creation - Material Creation Request on 20...	43	2012-11-08 22:35:40.013	2012-11-09 22:35:40.013	Material Creation	88	AD2008R2\wsuser1	2012-11-08 22:35:40.013
Material Creation - Material Creation Request on 20...	44	2012-11-09 16:45:11.557	2012-11-12 16:45:11.557	Material Creation	89	AD2008R2\wsuser1	2012-11-09 16:45:11.557
Material Creation - Material Creation Request on 20...	45	2012-11-09 16:56:23.267	2012-11-12 16:56:23.267	Material Creation	89	AD2008R2\vmxc	2012-11-09 16:56:23.267
JournalEntry - JournalEntry 11/21/2012 9:09:17 AM	46	2012-11-21 17:09:18.150	2012-11-23 17:09:18.150	JournalEntry	93	AD2008R2\wsuser1	2012-11-21 17:09:18.150
Data File Approval Process 11/21/2012 9:50:05 AM	47	2012-11-21 17:50:06.617	2012-11-22 17:50:06.617	Data File Approval ...	96	AD2008R2\wsuser1	NULL
Data File Approval Process 11/21/2012 10:15:17 ...	48	2012-11-21 18:15:17.830	2012-11-22 18:15:17.830	Data File Approval ...	97	AD2008R2\wsuser1	2013-01-02 18:15:17.830
Material Creation - Material Creation Request on 20...	49	2012-11-21 18:27:14.157	2012-11-22 18:27:14.157	Material Creation	90	AD2008R2\wsuser1	2012-11-21 18:27:14.157
Customer Create - Request New Customer 12/13/...	50	2012-12-13 21:40:47.950	2012-12-17 21:40:47.950	Customer Create	9	AD2008R2\wsuser1	2012-12-13 21:40:47.950
Create Customer - Create Customer 12/31/2012 1...	51	2012-12-31 19:16:46.300	2013-01-02 19:16:46.300	Create Customer	100	AD2008R2\wsuser1	2012-12-31 19:16:46.300
Create Customer - Create Customer 12/31/2012 1...	52	2012-12-31 20:25:22.710	2013-01-02 20:25:22.710	Create Customer	100	AD2008R2\wsuser1	2013-01-02 20:25:22.710
Create Customer - Create Customer 12/31/2012 1...	53	2012-12-31 20:56:47.973	2013-01-02 20:56:47.973	Create Customer	100	AD2008R2\wsuser1	NULL

dbo.WFPROCESS	
Columns	
Name	(nvarchar(512), not null)
ID	(PK, bigint, not null)
CreationDate	(datetime, not null)
DueDate	(datetime, null)
DefName	(ntext, not null)
DefId	(FK, bigint, not null)
Originator	(nvarchar(512), not null)
CompletionDate	(datetime, null)
Status	(FK, int, not null)
ReferenceId	(nvarchar(225), not null)
ReferenceId2	(nvarchar(225), null)
LastApprover	(nvarchar(256), null)
TimeStamp	(timestamp, not null)
SeqNo	(bigint, not null)
MiscInfo	(ntext, null)
FullPath	(ntext, null)
Salt	(binary(256), null)
Signature	(char(28), null)
ParentProcessId	(bigint, not null)
ParentNodeIntTag	(int, not null)
InheritanceLabel	(nvarchar(256), null)
Inactive	(smallint, not null)
Note	(ntext, null)
IsForced	(nvarchar(3), not null)
TaskItemTitle	(nvarchar(256), null)
ItemXml	(ntext, null)

# Workflow Metadata – from the Database



## Data from the Database

- Table WFAssignment

ProcessId	AssignedDate	DueDate	ReviewDate	CompletedDate	Status	Actor
1	2012-08-01 22:18:51.803	2012-07-31 22:18:51.807	NULL	2012-08-01 22:18:51.843	3	AD2008R2\WSUser1
1	2012-08-01 22:18:51.863	2012-08-02 22:18:51.863	NULL	2012-08-01 23:04:54.883	3	AD2008R2\WSUser1
2	2012-08-01 22:28:37.783	2012-07-31 22:28:37.783	NULL	2012-08-01 22:28:37.793	3	AD2008R2\WSUser1
2	2012-08-01 22:28:37.797	2012-08-02 22:28:37.797	NULL	2012-08-01 23:04:47.697	3	AD2008R2\WSUser1
3	2012-08-01 22:35:58.597	2012-07-31 22:35:58.600	NULL	2012-08-01 22:35:58.633	3	AD2008R2\WSUser1
3	2012-08-01 22:35:58.650	2012-08-02 22:35:58.650	2012-08-01 23:04:13.827	2012-08-01 23:04:39.913	3	AD2008R2\WSUser1
4	2012-08-01 22:41:00.083	2012-07-31 22:41:00.083	NULL	2012-08-01 22:41:00.093	3	AD2008R2\WSUser1
4	2012-08-01 22:41:00.097	2012-08-02 22:41:00.097	NULL	2012-08-01 23:04:32.000	3	AD2008R2\WSUser1
5	2012-08-01 22:50:34.907	2012-07-31 22:50:34.907	NULL	2012-08-01 22:50:34.920	3	AD2008R2\WSUser1
5	2012-08-01 22:50:34.923	2012-08-02 22:50:34.923	NULL	2012-08-01 22:55:34.870	4	AD2008R2\WSUser1
5	2012-08-01 22:55:34.927	2012-07-31 22:55:34.933	NULL	2012-08-01 22:55:34.983	3	
6	2012-08-01 23:05:01.593	2012-07-31 23:05:01.593	NULL	2012-08-01 23:05:01.600	3	AD2008R2\WSUser1
6	2012-08-01 23:05:01.603	2012-08-02 23:05:01.603	NULL	2012-08-01 23:07:02.200	4	AD2008R2\WSUser1
6	2012-08-01 23:07:02.227	2012-07-31 23:07:02.233	NULL	2012-08-01 23:07:02.243	3	
7	2012-08-01 23:20:41.370	2012-07-31 23:20:41.373	NULL	2012-08-01 23:20:41.407	3	AD2008R2\WSUser1
7	2012-08-01 23:20:41.423	2012-08-02 23:20:41.423	2012-08-01 23:20:54.067	2012-08-01 23:20:59.773	4	AD2008R2\WSUser1
7	2012-08-01 23:20:59.780	2012-08-02 23:20:59.780	2012-08-01 23:24:27.723	2012-08-01 23:24:39.980	4	AD2008R2\WSUser1
7	2012-08-01 23:24:39.980	2012-07-31 23:24:39.980	NULL	2012-08-01 23:24:39.987	3	

dbo.WFAssignment
Columns
ID (PK, bigint, not null)
InternalTag (int, not null)
ProcessId (FK, bigint, not null)
AssignedDate (datetime, null)
DueDate (datetime, null)
ReviewDate (datetime, null)
CompletedDate (datetime, null)
Status (FK, int, not null)
Actor (nvarchar(256), null)
Note (ntext, null)
History (int, not null)
BlockID (int, null)
ReminderNotified (int, not null)
LateNotified (int, not null)
SeqNo (nvarchar(32), not null)
TimeStamp (timestamp, not null)
UserData (nvarchar(256), null)
UserId (int, not null)
AutoApproved (int, not null)
Disposition (nvarchar(256), null)

# Workflow Metadata



## Topics

- Data from Form
- Data from the Workflow Database
- **Data from Workflow SharePoint Lists**
- Workflow Dashboard... *Beta!*
- Tips



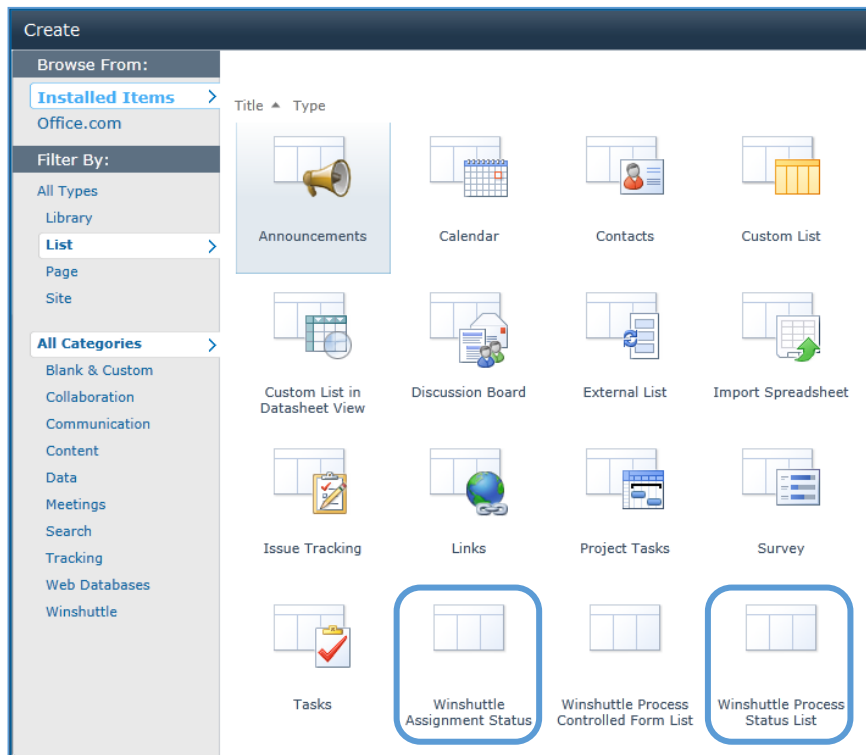
# Workflow Metadata – in the Workflow SP Lists



## Data from the Workflow SharePoint Lists

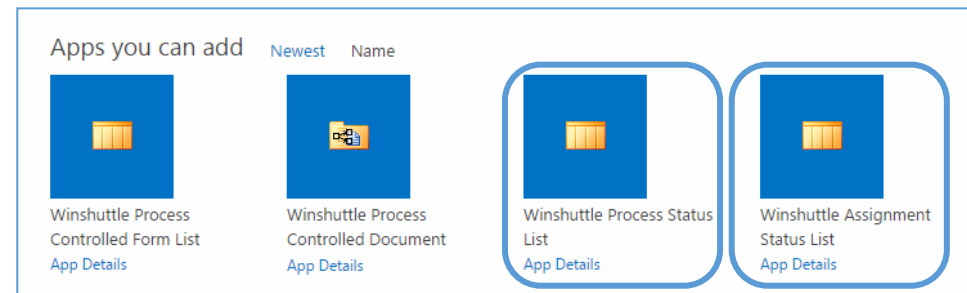
- Create the SharePoint Lists

### SharePoint 2010



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### SharePoint 2013



# Workflow Metadata – in the Workflow SP Lists



## Data from the Workflow SharePoint Lists

- Refer Solution file to Assignment & Process Lists

### Designer

Publishing	
AutoAttachedDocumentList	
AutoAttachedDocumentSite	
InfoPathForm	
SharePointList	<b>HR Employee New Hire</b>
SharePointSite	<b><a href="http://mymillcreek/hcm/forms">http://mymillcreek/hcm/forms</a></b>
SharePointSiteExtensions	
SharePointTaskList	
SharePointTaskListSite	
ShareVisAssignmentStatusList	<b>WSAssignmentStatus</b>
ShareVisProcessStatusList	<b>WSProcessStatusList</b>
ShareVisStatusListSite	

### Composer

Publishing	
Assignment Status List	WSAssignmentStatusList
Process Status List	WSProcessStatusList
SharePoint Site Extensions	
Status SharePoint Site	<a href="http://catlab.winshuttle.com/sedemos">http://catlab.winshuttle.com/sedemos</a>
Task SharePoint List	
Task SharePoint Site	

Optionally format those lists, selecting fields , order & using Group By

# Workflow Metadata – in the Workflow SP Lists



## Data from the Workflow SharePoint Lists

- Optionally edit List Settings – View “All Items”

### Assignment Status

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Attachments	1
<input checked="" type="checkbox"/>	Title (linked to item with edit menu)	2
<input checked="" type="checkbox"/>	Created	3
<input checked="" type="checkbox"/>	Modified	4
<input checked="" type="checkbox"/>	Created By	5
<input checked="" type="checkbox"/>	SVTaskDescription	6
<input checked="" type="checkbox"/>	SVSwimlane	7
<input checked="" type="checkbox"/>	SVAssigneeFullName	8
<input checked="" type="checkbox"/>	SVTaskType	9
<input checked="" type="checkbox"/>	SVTaskDuration	10
<input checked="" type="checkbox"/>	SVAssignmentStatus	11
<input checked="" type="checkbox"/>	SVAssignedDate	12
<input checked="" type="checkbox"/>	SVReviewDate	13
<input checked="" type="checkbox"/>	SVDueDate	14
<input checked="" type="checkbox"/>	SVCompletionDate	15
<input checked="" type="checkbox"/>	SVUTCAssignedDate	16
<input checked="" type="checkbox"/>	SVUTCReviewDate	17
<input checked="" type="checkbox"/>	SVUTCDueDate	18
<input checked="" type="checkbox"/>	SVUTCCompletionDate	19
<input checked="" type="checkbox"/>	SVProcessId	20

#### Group By

Select up to two columns to determine what type of group and subgroup the items in the view will be displayed in. [Learn about grouping items.](#)

First group by the column:

Title

### Process Status

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Attachments	1
<input checked="" type="checkbox"/>	Title (linked to item with edit menu)	2
<input checked="" type="checkbox"/>	Created	3
<input checked="" type="checkbox"/>	Modified	4
<input checked="" type="checkbox"/>	Created By	5
<input checked="" type="checkbox"/>	SVCreationDate	6
<input checked="" type="checkbox"/>	SVDueDate	7
<input checked="" type="checkbox"/>	SVCompletionDate	8
<input checked="" type="checkbox"/>	SVItemLink	9
<input checked="" type="checkbox"/>	SVHistoryLink	10
<input checked="" type="checkbox"/>	SVOriginatorFullName	11
<input checked="" type="checkbox"/>	SVProcessStatus	12
<input checked="" type="checkbox"/>	SVProcessDefinitionName	13
<input checked="" type="checkbox"/>	SVProcessId	14
<input checked="" type="checkbox"/>	SVProcessDuration	15

#### Group By

Select up to two columns to determine what type of group and subgroup the items in the view will be displayed in. [Learn about grouping items.](#)

First group by the column:

SVProcessDefinitionName

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# Workflow Metadata – in the Workflow SP Lists



## Data from the Workflow SharePoint List

See Workflow data in SharePoint List Assignment Status

Title	Created	Modified	Created By	SVCreationDate	SVDueDate	SVCompletionDate	SVItemLink	SVHistoryLink	SVOriginatorFullName	SVProcessStatus	SVProcessDefinitionName
SVProcessDefinitionName : CAT2TimeEntry (9)											
SVProcessDefinitionName : HR Employee New Hire (10)											
New Hire Request for Molly Mike on 2013-02-05 16:43:10	2/5/2013 4:43 PM	2/6/2013 1:01 PM	Winshuttle User1	2/5/2013 4:43 PM	2/6/2013 4:43 PM	2/6/2013 1:01 PM	Item	History	Winshuttle User1	Approved	HR Employee New Hire
New Hire Request for Jeffrey Rey on 2013-02-08 13:23:50	2/8/2013 1:24 PM	2/8/2013 1:55 PM	Winshuttle User1	2/8/2013 1:24 PM	2/11/2013 1:24 PM	2/8/2013 1:55 PM	Item	History	Winshuttle User1	Rejected	HR Employee New Hire
New Hire Request for Igor Bahn on 2013-02-11 16:57:04	2/11/2013 4:57 PM	2/11/2013 5:03 PM	Winshuttle User1	2/11/2013 4:57 PM	2/12/2013 4:57 PM	2/11/2013 5:02 PM	Item	History	Winshuttle User1	Approved	HR Employee New Hire
New Hire Request for Steven Olsson on 2013-02-11 16:57:04	3/1/2013 9:39 AM	3/1/2013 9:59 AM	Winshuttle User1	3/1/2013 9:39 AM	3/4/2013 9:39 AM	3/1/2013 9:59 AM	Item	History	Winshuttle User1	Approved	HR Employee New Hire

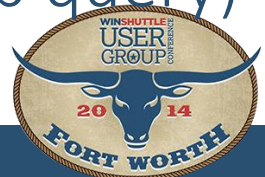
Contains commands for working with the selected items.



Export to  
Excel

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You can export to Excel, if desired (iqy web query)



# Workflow Metadata – in the Workflow SP Lists



## Data from the Assignment SharePoint List

See Workflow data in SharePoint Assignment Status

ID	Title	Created	Modified	Created By	SVTaskDescription	SVSwimlane	SVAssigneeFullName	SVTaskType	SVTaskDuration	SVAssignmentStatus	SVAssignedDate	SVReviewDate	SV
	Title : CAT2TimeEntry 12/16/2013 12:32:22 PM (2)												
	Title : CAT2TimeEntry 12/16/2013 12:45:41 PM (2)												
	Title : CAT2TimeEntry 4/1/2014 10:23:20 AM (1)												
	Title : CAT2TimeEntry 5/7/2013 7:44:17 AM (1)												
	Title : CAT2TimeEntry 8/21/2013 5:26:54 PM (1)												
	Title : CAT2TimeEntry 9/5/2013 10:47:42 AM (1)												
	Title : CAT2TimeEntry 9/5/2013 2:50:12 PM (1)												
	Title : CAT2TimeEntry 9/5/2013 2:53:10 PM (1)												
	Title : CAT2TimeEntry 9/5/2013 3:56:51 PM (1)												
	Title : LeaveOfAbsenceRequest 4/1/2013 1:02:56 PM (13)												
	Title : LeaveOfAbsenceRequest 4/1/2013 1:06:03 PM (6)												
	Title : LeaveOfAbsenceRequest 4/1/2013 12:58:26 PM (6)												
	Title : New Hire Request for Halley Barrey on 2013-09-05 14:57:04 (8)												
	New Hire Request for Halley Barrey on 2013-09-05 14:57:04	9/5/2013 2:57 PM	9/5/2013 2:58 PM	Max Chaya	New Hire Manager Approval	Manager	Max Chaya	Approval	1	Approved	9/5/2013 2:57 PM	9/5/2013 2:58 PM	9/5/2013 2:58 PM
	New Hire Request	9/5/2013 2:58 PM	9/5/2013 2:59 PM	Winshuttle	New Hire process Payroll approval	Payroll Audit	Winshuttle User1	Approval	24	Approved	9/5/2013 2:58 PM	9/5/2013 2:58 PM	9/6/2013 2:58 PM



You can export to Excel, if desired (iqy web query)

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# Workflow Metadata – in the Workflow SP Lists



## Data from the Assignment SharePoint List

- See Workflow data in SharePoint Assignment Status
- Use UTC Dates (GMT) if an International Company



SVUTCReviewDate	SVUTCDueDate	SVUTCCompletionDate
	12/18/2013 8:32 PM	12/16/2013 8:43 PM
12/16/2013 8:43 PM	12/18/2013 8:32 PM	12/16/2013 8:44 PM
	12/18/2013 8:45 PM	12/16/2013 8:47 PM
	12/18/2013 8:45 PM	2/13/2014 1:06 AM
	4/3/2014 5:23 PM	

# Workflow Metadata



## Topics

- Data from Form
- Data from the Workflow Database
- Data from Workflow SharePoint Lists
- **Workflow Dashboard... *Beta***
- Tips





# Workflow Metadata – Dashboard *Coming soon*

## Data from the Dashboards – with drill down



**WINSHUTTLE™ Workflow** Reload Settings Back to Main

**Processes Overview** Period Specify Dates 4/2/2014 9/1/2014 Go

**Tasks (Recently updated)**

TASK NAME	TARGET DURATION (HRS)	AVERAGE ACTUAL DURATION (HRS)	ON TIME
Approval 1			
Approval1			
AR Account			
AR Section			
BranchMar			
MDM Appro			
Review from			
Review from			
Review from			
Review from			

**Workload (Assignees)** Top 10 people ▾

200  
180  
160

Home » Customer Create Dashboard » **Tasks » AR Section Head Decision**

Period From To Assignee On Time

Specify Dates 4/2/2014 9/1/2014 All All Search

Home » Customer Create Dashboard » **Tasks » AR Section Head Decision » Agostino Da Polenza**

ASSIGNEE

Agostino Da

Period From To Status On Time

Specify Dates 4/2/2014 9/1/2014 All All Search

COMPLETED DATE	ASSIGNED DATE	TARGET DURATION (HRS)	ACTUAL DURATION (HRS)	STATUS	ON TIME
4/5/2014 11:14 PM	4/5/2014 11:02 PM	24	0.2	Approved	●
4/8/2014 12:30 AM	4/7/2014 10:00 PM	24	2.5	Approved	●
4/9/2014 9:31 PM	4/9/2014 9:18 PM	24	0.2	Approved	●
4/17/2014 2:13 AM	4/16/2014 2:21 AM	24	23.84	Approved	●
4/17/2014 4:14 AM	4/16/2014 6:35 AM	24	21.64	Approved	●
4/19/2014 9:17 PM	4/17/2014 12:22 AM	24	68.87	Approved	●

**Workflow Reports**

- Tasks
- Assignee
- Events

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# Workflow Metadata – Dashboard *Coming soon*

## Data from the Dashboards – Workflow Reports



Home > Customer Create Dashboard >

### Tasks

Period: Specify Dates | From: 4/2/2014 | To: 9/1/2014 | On Time: All | Search

TASK NAME	TARGET DURATION (HRS)	AVERAGE ACTUAL DURATION (HRS)	ON TIME
Agostino Da Polenza	24	33.05	43 events

Workflow Reports

Tasks

### Customer Create Assignee

Period: Specify Dates | From: 4/2/2014 | To: 9/1/2014 | Task: All | Assignee: All | On Time: All | Search

ASSIGNEE	TASK	TARGET DURATION (HRS)	AVERAGE ACTUAL DURATION (HRS)	ON TIME
Agostino Da Polenza	AR Section Head Decision	24	33.05	43 events

Workflow Reports

Tasks

### Events

Period: Specify Dates | From: 4/2/2014 | To: 9/1/2014 | Task: All | Assignee: All | Status: All | On Time: All | Search

COMPLETED DATE	TASK	ASSIGNEE	ASSIGNED DATE	TARGET DURATION (HRS)	ACTUAL DURATION (HRS)	STATUS	ON TIME
3/31/2014 9:29 PM	BranchManager Decision	Reinhold Messner	3/30/2014 8:52 PM	24	24.6	Approved	●
3/31/2014 9:34 PM	AR Accountant Decision	Stephane Schaffter	3/31/2014 9:29 PM	24	0.08	Approved	●
4/1/2014 12:27 AM	AR Section Head Decision	Peter Mezger	3/31/2014 9:34 PM	24	2.89	Approved	●
4/1/2014 2:14 AM	Review from MDM Team	Norbert Joos	4/1/2014 12:45 AM	24	1.47	Completed	●

Workflow Reports

Tasks

Assignee

Events

**WINS**



# Workflow Metadata



## Topics

- Data from Form
- Data from the Workflow Database
- Data from special Workflow SharePoint Lists
- Workflow Dashboard... *Beta!*
- Tips

# Workflow Metadata - Tips



## Tips

- All Workflow related lists can be joined by TITLE
  - Process Status, Assignment Status and Process Lists (Form Data)
- Process Status & Assignment Status can be joined by Process ID
- Data can be exported from SharePoint to Excel for easy reporting/analysis
- Check with your SharePoint Admin about SharePoint list size limits, as well as archiving

# Workflow Metadata –Review



## Topics

- Data from Form
- Data from the Workflow Database
- Data from Workflow SharePoint Lists
- Workflow Dashboard... *Beta!*
- Tips

# Questions?



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