

How to Monitor a Workflow

Once a workflow is published and active, you can monitor the status of each respondent's run.

Customer Experience- NPS Follow Up

BUILD TEST **MONITOR**

Run history

Version 1 ▾

Filter ▾ Search for an existing run

Completed 26 (52%)

In progress 24 (48%)

Most common step #3 NPS Survey Follow Up

<input type="checkbox"/> Run ID	Status	Date Started	Last Updated ▲	Current Step	Total Time
<input type="checkbox"/> 63c6465f7f069	IN PROGRESS	Jan 16, 2023 10:55 pm	Jan 16, 2023 10:55 pm	-	3 months
<input type="checkbox"/> 63c6468640915	IN PROGRESS	Jan 16, 2023 10:56 pm	Jan 16, 2023 10:56 pm	-	3 months
<input type="checkbox"/> 63c646a455fe5	IN PROGRESS	Jan 16, 2023 10:56 pm	Jan 16, 2023 10:56 pm	-	3 months
<input type="checkbox"/> 63c646d678367	IN PROGRESS	Jan 16, 2023 10:57 pm	Jan 16, 2023 10:57 pm	-	3 months
<input type="checkbox"/> 63c646ea7fe1a	IN PROGRESS	Jan 16, 2023 10:57 pm	Jan 16, 2023 10:57 pm	-	3 months
<input type="checkbox"/> 63c6470899c66	IN PROGRESS	Jan 16, 2023 10:58 pm	Jan 16, 2023 10:58 pm	-	3 months

Follow these steps to monitor a workflow:

1. Navigate to the Monitor Tab. It is located on the top left of the screen under the workflow title and on the right of the Test Tab.
2. At the top of the Monitor tab you can see three metric tiles that include high-level summary statistics for your current workflow version. These tiles make up the Monitor Status Bar, and this bar will only appear if there are runs in the workflow run history. These tiles provide the following information:

Completed: This tile provides the number of completed workflow runs. It also provides the percentage of total runs that are complete.

In Progress: This tile provides the number of in progress workflow runs. It also provides the percentage of total workflow runs that are in progress.

Most Common Step: This tile tells you which workflow step most in progress respondents are currently on.

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Most common step

#3 NPS Survey Follow Up

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3. Click into each run ID to view the status of each workflow step and identify where respondents are at in their journey. You can see what step they are currently on and how long it has taken them.
4. You can filter runs by version, status, run type, and other characteristics with the filter drop down in the right corner. You can also search for specific runs with the search bar.

Customer Experience- NPS Follow Up

BUILD TEST **MONITOR**

Run history

Version 1 Filter

Completed

26 (52%)

In progress

24 (48%)

Most common step

#3 NPS Survey Follow Up

Status

☒ In Progress

☒ Completed

☒ Error

☒ Deleted

☒ Terminated

Run Type

☒ Real Run

<input type="checkbox"/> Run ID	Status	Date Started	Last Updated	Current Step	Total Time
<input type="checkbox"/> 63c6465f7f069	IN PROGRESS	Jan 16, 2023 10:55 pm	Jan 16, 2023 10:55 pm	-	3 months
<input type="checkbox"/> 63c6468640915	IN PROGRESS	Jan 16, 2023 10:56 pm	Jan 16, 2023 10:56 pm	-	3 months
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4. Check the box next to the Run ID to terminate specific runs. This will stop the workflow from continuing on for that individual.

Customer Experience- NPS Follow Up

BUILD TEST **MONITOR**

Run history

Version 1 ▾

Filter ▾ Search for an existing run

Completed 26 (52%) In progress 24 (48%) Most common step #3 NPS Survey Follow Up

1 selected Terminate in progress runs

Run ID	Status	Date Started	Last Updated	Current Step	Total Time
<input checked="" type="checkbox"/> 63c64657f069	IN PROGRESS	Jan 16, 2023 10:55 pm	Jan 16, 2023 10:55 pm	-	3 months
<input type="checkbox"/> 63c6468640915	IN PROGRESS	Jan 16, 2023 10:56 pm	Jan 16, 2023 10:56 pm	-	3 months
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If you use the "Mark a Survey Response as Complete" feature in Alchemer Survey (for surveys in a workflow, it will create a new/duplicate run for that workflow. This new/duplicate workflow run is launched at the submission of a survey.

So, when the "Mark a Survey Response as Complete" function passes in the survey, a workflow run will start. Then when the submit button is clicked, a new workflow run will start.

These runs will not be connected to each other in any way, and the respondent will receive each subsequent step in the workflow each time.

Exporting from Workflow: Delivery Statistics and Survey Data

The **Export** functionality in the Monitor tab of Alchemer Workflow product has been enhanced to support multiple export types via a dropdown menu.

Zendesk Custom Event

BUILD TEST **MONITOR**

Run history

Version 2 ▾

Filter ▾ Search for an existing run

Completed 1 (100%) In progress 0 (0%) Most common step #

Export Report

Export

New Export ▴

- Survey Data
- Delivery Statistics

Selecting an Export Type

When users click the **Export** button, they will now see a dropdown with the following options:

- **Survey Data**

This is the original export option and functions as before.

- **Delivery Statistics**

This is a new export option that allows users to generate detailed delivery metrics

Delivery Statistics Export Options

Upon selecting **Delivery Statistics**, a new export dialog pane will appear. This pane includes the following configurable parameters:

Export Name

- If left blank, the export will be automatically named:

`Alchemer_Workflow_Delivery_Statistics_<workflowId>_<unix_timestamp>.csv`

- If a user provides a custom name, the generated `.csv` file will reflect that name.

Version(s)

- Users can choose to export data from **All Versions** of the workflow or select a **specific version**.

Date Range

- The **Date Range** input allows users to define a start and end date for the export.
- **Defaults** to the **last 7 days**, ending with the current date.
- If the selected range exceeds **90 days**, an error will appear.
 - Once cleared, the selector will reset to the default 7-day range.

Related Articles
