APROOVE WM

Drive your Business Process with **Metadata & Forms**

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What is Metadata?

Metadata is information about a project in Aproove

- Aproove Metadata is a collection of critical business information related to a project
- For example:
  - The project creator's name
  - A Unique project number
  - Deadline dates for tasks or the project
  - The list of Stakeholders
  - etc.

What is it used for?

- Storage of any useful information
- Enables reporting
- Enriches searching
- Empowers automation
- Auto-generated documents
- Enhances interactions with with other business-critical systems

How does metadata get created?

Aproove Metadata:

Metadata is a powerful tool, but how do we insert metadata into Aproove?

- Via an external systems
- Automatically generated by Aproove
- Automatically added by users when performing tasks
- Using Aproove Forms (Today's focus)

What are Forms?

Aproove Forms:

Forms allow you to collect and harvest project and task information anywhere in your workflow. Drive efficiency by capturing relevant information and documents at the correct time in the project journey.

- Present customizable forms anywhere in your workflow/s
- Forms can lead stakeholders to provide the required data and supporting documents in a structured way with both compulsory and optional fields
- Form data can be harvested and stored in the database to drive workflow automation, as well as feed custom reports or generate content
- Forms can link 3rd party systems together
- Forms help you to **standardize** processes, gain **efficiency** and **eliminate wasted time** chasing for information

Use Case Demos

Today's Examples:

In our live examples, we will show you the powerful combination of Metadata and Forms working together to drive your business process workflows!

1 - Display useful information from other business-critical systems

2 - Project kickoff, supplier selection and automatic task generation (spreadsheet replacement)

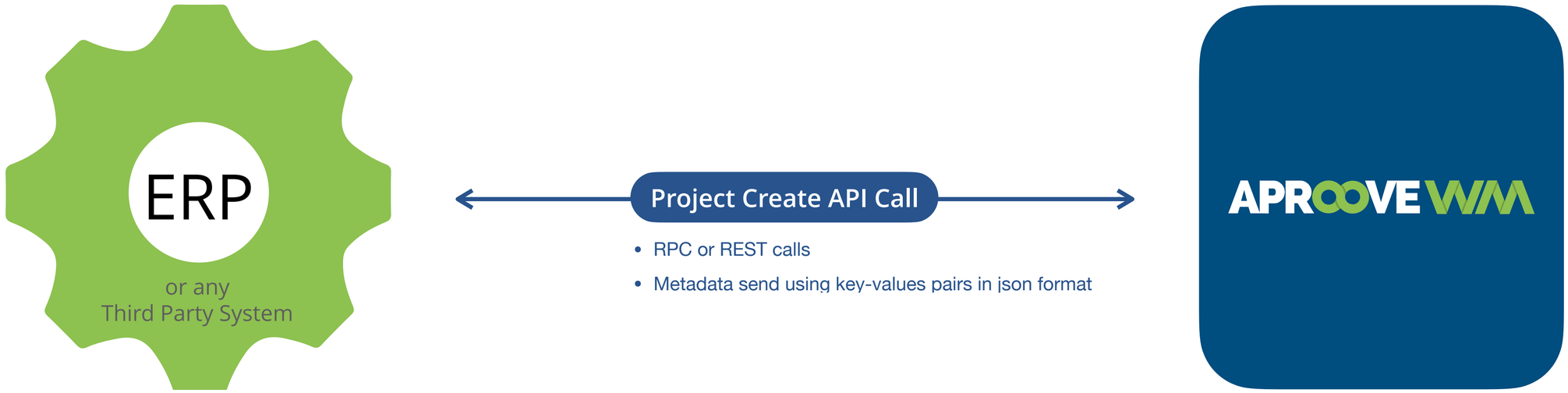
3 - Product selection in Aproove using multiple connections to external systems

4 - Data capture for auto-generation of Point-of-Sale (POS) material

Other Use Cases

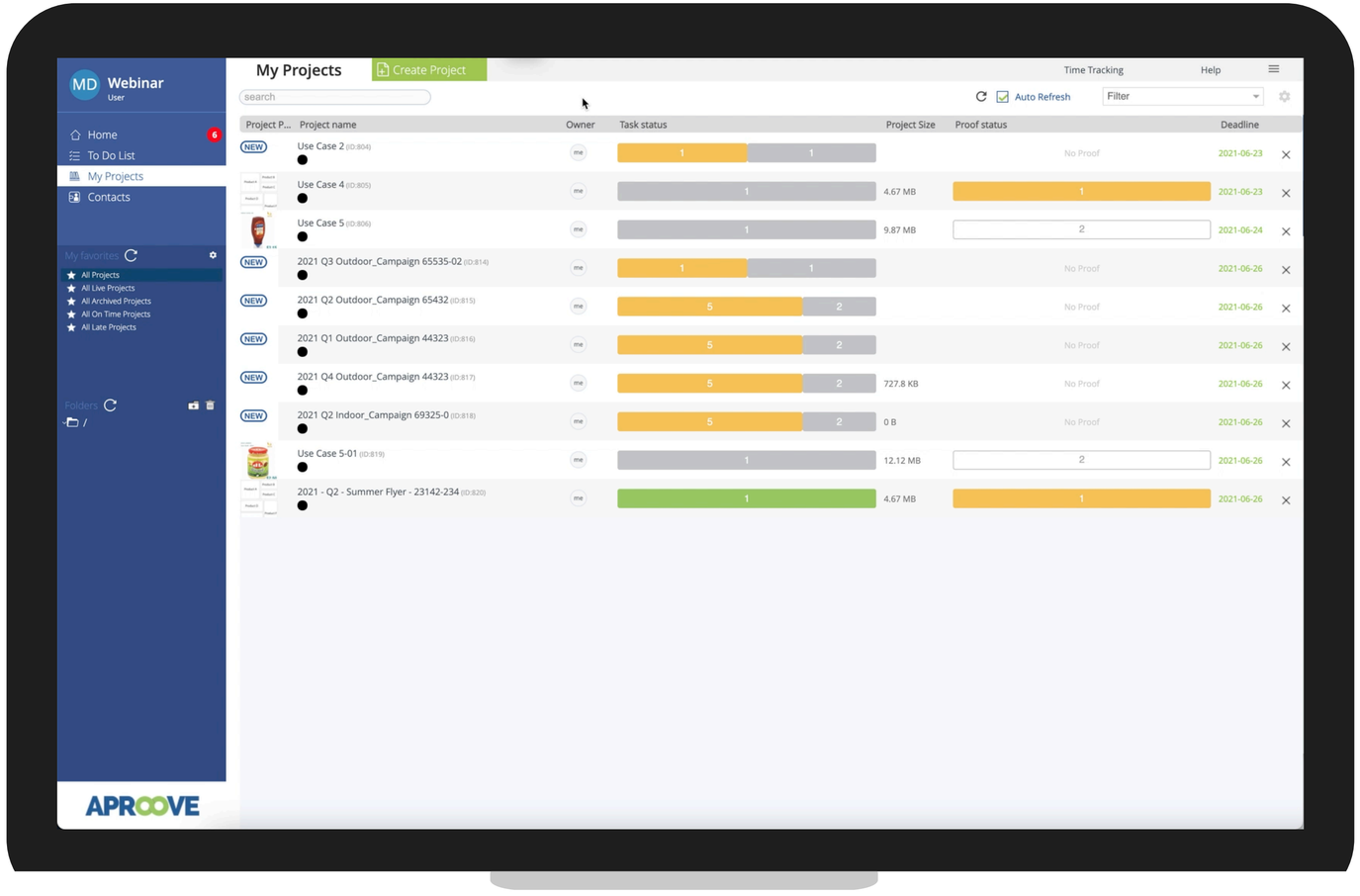
- Select customer from a dropdown list
- Set deadlines for each step of a workflow from your external ERP
- Send email alerts when a step loops more than once
- Feed captured data to custom reports
- Plus many more!

Example 1 - Display useful information from other business-critical systems



Example 1 - Video Demo

Display useful information from other business-critical systems



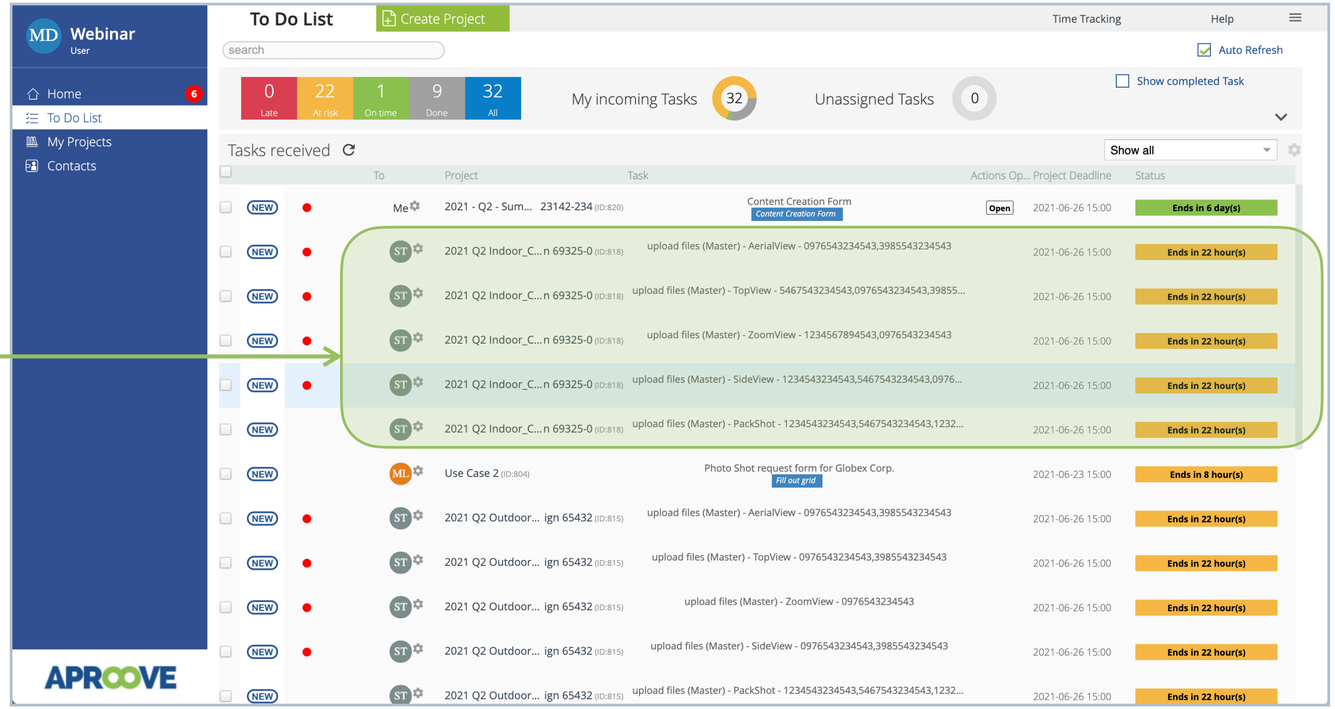
Example 2 - Project kickoff, supplier selection and automatic task generation

1 Data grid completed

Requested Shots

Product	SKU	Resolution	Packshot	Side View	Zoom View	Top View	Aerial View
Cool New Sneakers	1234543234543		☑	☐	☐	☐	☐
Nifty Handbag	5467543234543		☑	☐	☐	☐	☐
Classic Watch	1234567894543		☐	☐	☐	☐	☐
Normal Jacket	1232679234543		☑	☐	☐	☐	☐
Perfume Bottle 200ml	0976543234543		☐	☑	☑	☑	☑
Wireless Headphones	3459543234543		☐	☐	☐	☐	☐
Pink Guitar	3985543234543		☐	☑	☐	☑	☑

2 Tasks automatically generated in user dashboard

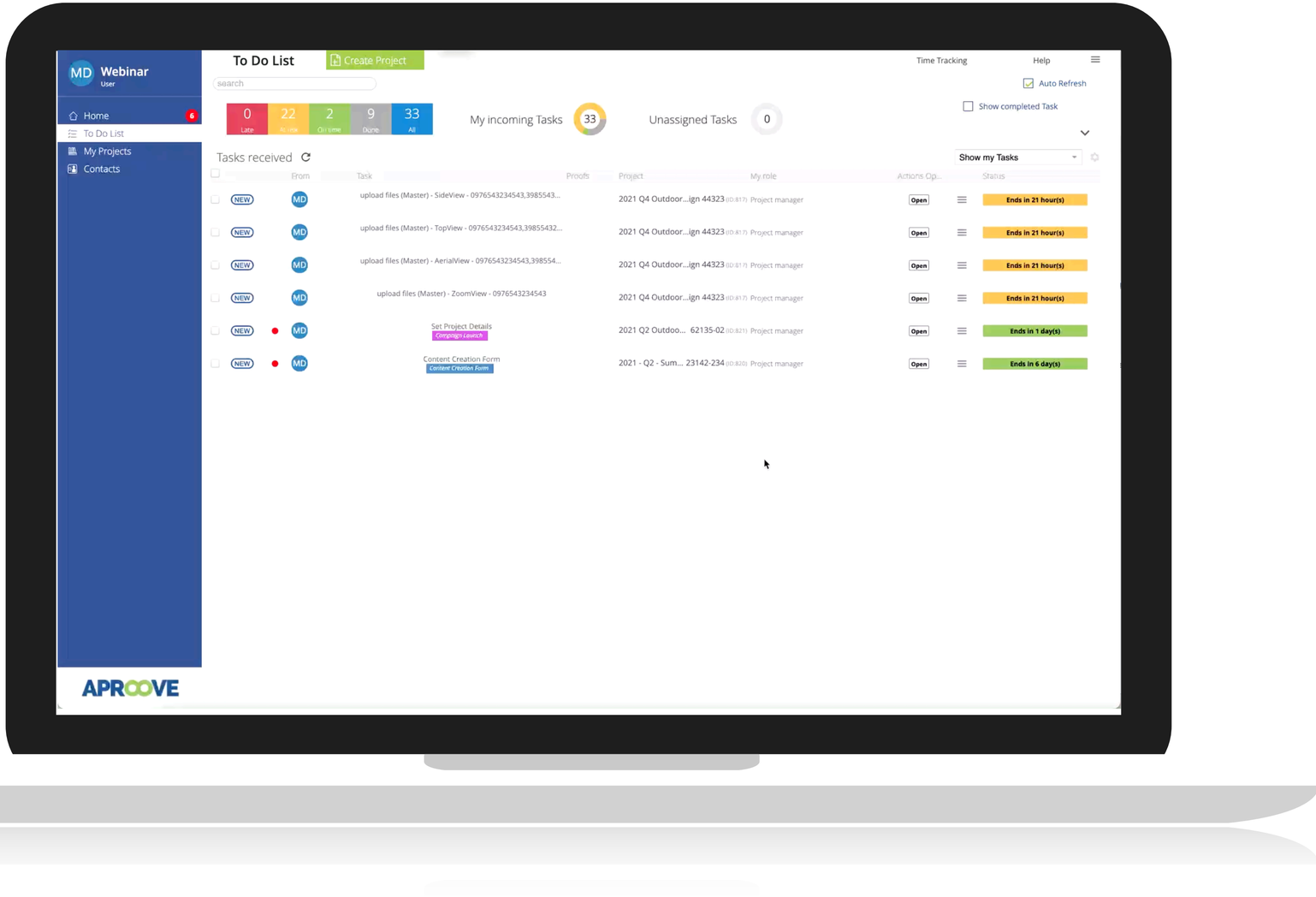


Example 2 - Video Demo

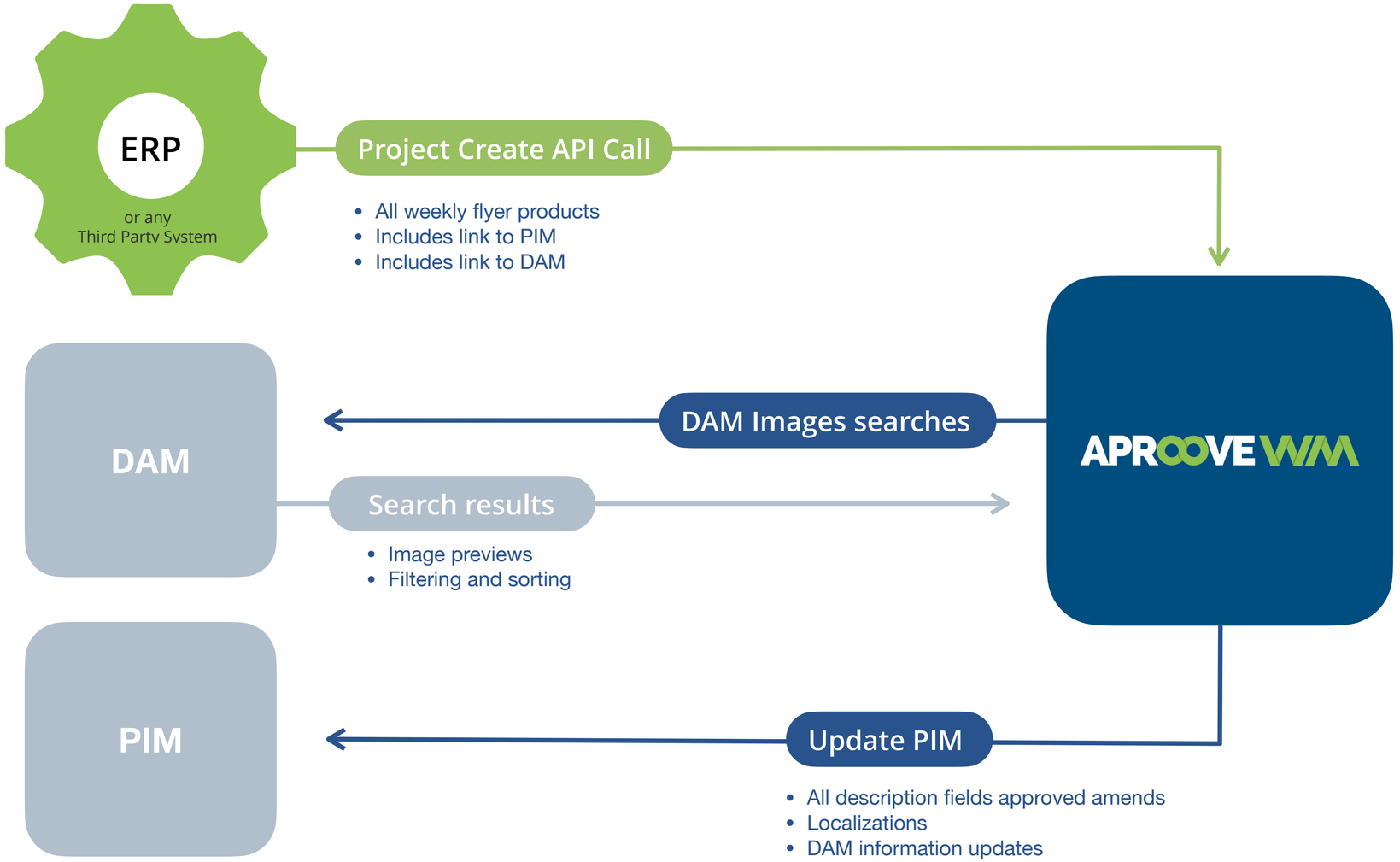
Workflow example with form intake and form grid example (spreadsheet replacement)

Demo Scenario

- This is a luxury goods company that has several brands under its ownership. The luxury goods company is launching a new product.
- The luxury brand has an ERP system storing all the product information. The Product Owner uses the ERP to select the new products that require a marketing campaign.



Example 3 - Product selection in Aproove using multiple connections to external systems



Example 3 - Video Demo

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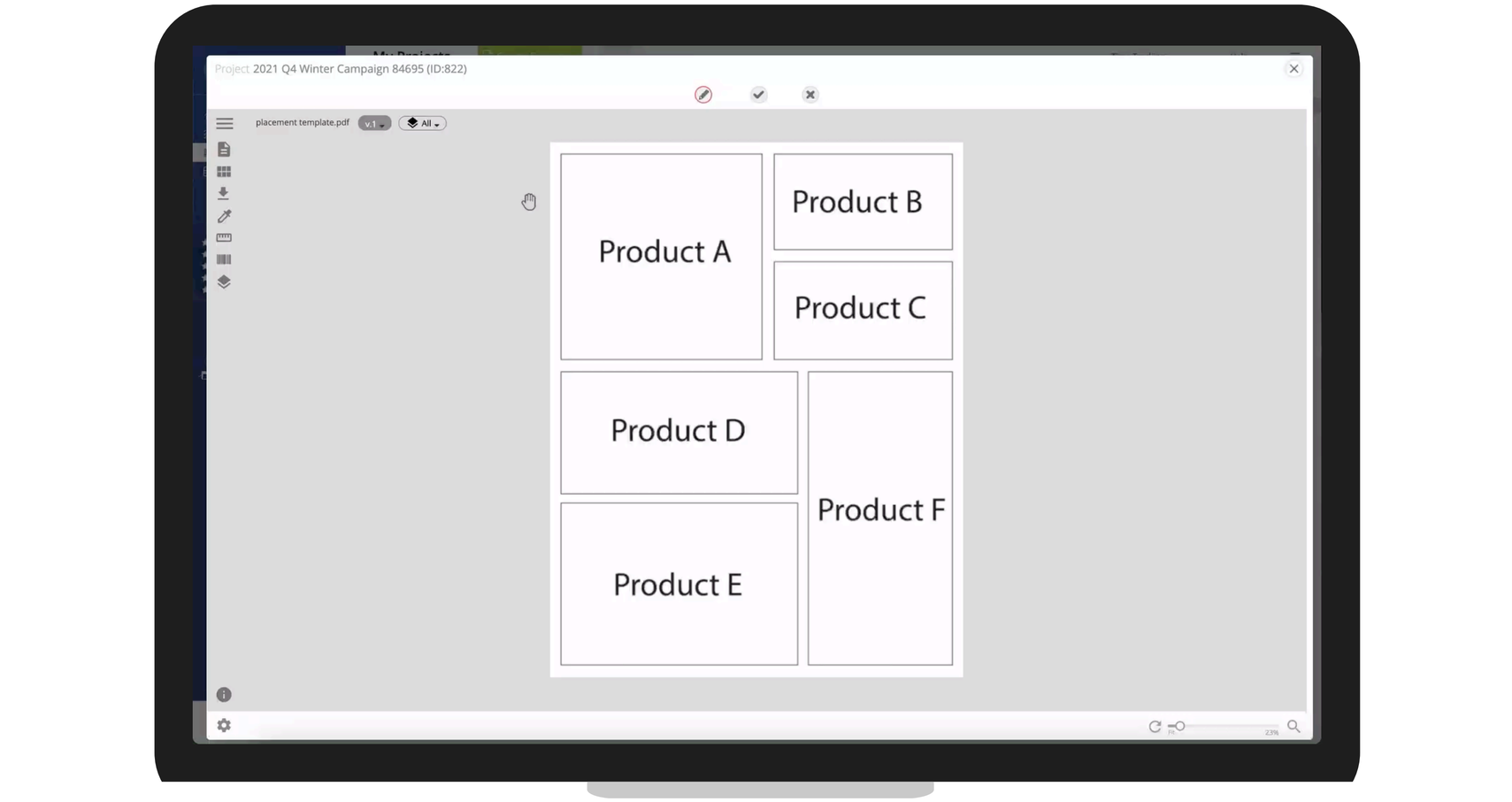


4 - Data capture for auto-generation of Point-of-Sale (POS) material

ERP

or any
Third Party System

Project Create API Call

- All weekly flyer products
- Includes link to PIM
- Includes link to DAM

APROOVE WM

Image database search

- Keyword based
- Metadata based

DAM

Search results

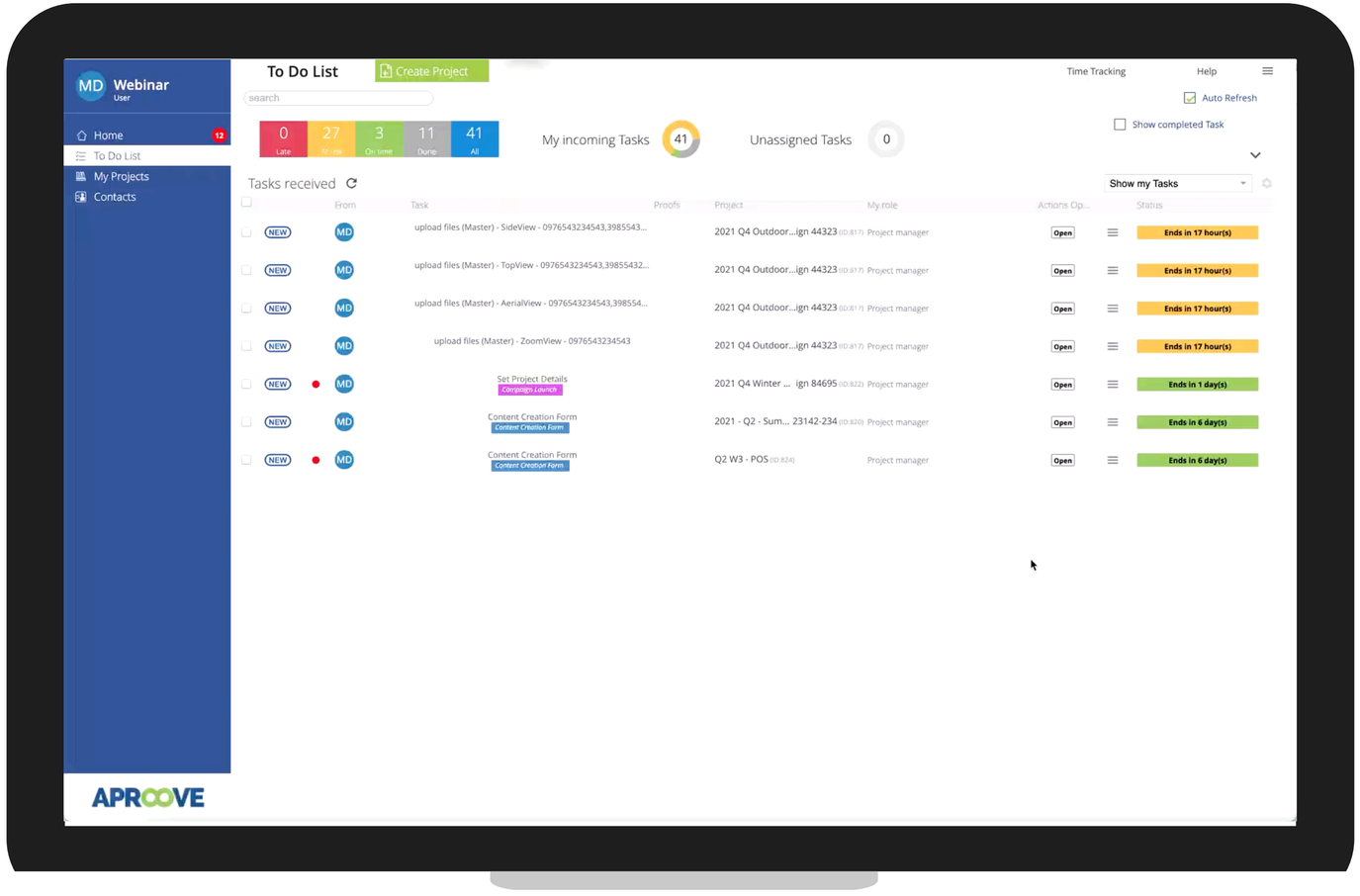
- Image previews
- Filtering and sorting

PDF generation from Metadata

- Generates on demand
- Layout predefined
- Could be sent into any workflow

Example 4 - Video Demo

Data capture for auto-generation of Point-of-Sale (POS) material



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Summary

Aproove Forms and Metadata:

Today's webinar aimed to update our executive customers on a small subset of Aproove capabilities

- Metadata enriches Aproove projects with additional information
- Metadata can be used as variables to drive your workflows
- Forms standardize the gathering of metadata and files anywhere in the process
- Forms allow users to interact with external systems directly in Aproove
- Aproove can flow, collect, and process information between your business-critical systems while acting as a central hub
- Metadata and Forms increases your efficiency and reduces risk while saving both time and money

Summary

Thank You!

We will follow up next week with;

- A link to the webinar recording
- A link to the presentation keynote with additional scenario videos
- A Questions and Answer (QA) sheet for any questions asked during the webinar
- **We welcome and value your feedback about the direction and content you would like to see in future webinars**