General information

The menu items, which are combined by the **Workflow** menu bar, serve to track the progress of your own and assigned requests, as well as an archive for completed requests and completed tasks.



This document demonstrates the **operation of the filter function** and the **history view** using the example of "Uncompleted requests¹". However, the same options are also available under the other menu items of this sub-item.

Operation of the filter function

uncompleted Requests									
Perform marked actions	2 Refresh	Q Show Filter	⊘ Hide Progress						

• The filter function (Show Filter) allows you to search for specific requests in the workflow lists.

ι	incompleted	l Requ	uests													
	9 Perform marked	actions	2 Refresh	Q Hide Filter	Ø Hide F	Progress									₽	Print
	Author of Process	Rosso Clo	oudia (00021034	2) • Creation	date from			to		m	Apply Filter					
	Group	All groups	5	* Effect	date from			to		*						
	Process	All proces	sdefinitions	Ŧ												
													3 Entr	ies Lines:	10	~
	Date of application		🚽 Author	of Process	4	Performers	Detail	s				Progress	Action	(s)		
	May 20, 2021	2021 Rosso Cloudia PM (000210342, PP-AGB1)		Cloudia		Renner Rudi	0 S	Sonderfehlzeit				ත් Rosso Cloudia		🗋 🇃 Delete		
	2:59:27 PM				Absenceentry Treatment fullday Sep 16, 2021 - Sep 20, 2021 Comment : Recovery Treatment <u>Details</u>							∌ Print				

Using the following parameters (search criteria) you can then search for the relevant request:

• Author of Process

Here you can search for a specific applicant > selection of the desired person (process author) from the list of names.

• Group

With this parameter you can select a specific group (e.g. management or marketing), or search in all groups.

• Process

Search for a specific process (for example, all vacation requests of a desired person > Process vacation). If you want to see all requests, select "All processes" as parameter

• Creation date from / to

Search for requests with a specific creation date (it is possible to enter either from - to date, or for example only to date to see all requests submitted up to a specific date)

• Effect date from / to

All applications whose validity period is valid from the from date are displayed. In addition, you can limit the effective date with the to-date parameter.

By clicking the "**Apply Filter**" button, the applications are searched and displayed according to the parameters.

If you do not want to have the filter criteria on the screen, click on the "Hide filter" button.

If you do not want the column with the process history to be displayed in the application overview, click on the "**Hide Progress**" button. If you want to see the column again, select "**Show Progress**".

History view

Once you have found the required request using the filter parameters (search criteria), you can take a closer look at it using the Info button (Details column):

By clicking on the info button, the following information is displayed:

• Form

All data from the request form are summarized here (from-to date, reason for error, comment, etc.).

Process Details		
← Back		🖨 Print
Overview		9
Requestor: Rosso Cloudia Employee-ID: 000210342 Orgunit: PP-AGB1 Name of process: Sonderfehizeit Process ID: 625184_StdSonderFehizeit_StdSonder Started on: May 20, 2021 2:59:27 PM Finished at: Description: Recovery Treatment State: open.running	ırFehlzeit	
Form Progress Variables		
From-Date To-Date Absence Reason * Comment	16.09.2021 20.09.2021 Treatment Recovery Treatment	Das Formular Sonderurlaub dient (nach Vereinbarung mit dem Vorgesetzten) zur Erfassung von Sonderurlauben im Zusammenhang mit Heirat, Geburt, Todestal und Wohnsttzwechsel. An Vorgesetzten bzw. Stellvertreter zur ersten Genehmigung. Im Anschluss zur Genehmigung durch Personalmanagement nach Kontrolle des Sonderurlaub- Anspruchs.
Attachments		
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• Progress

Here you can see the roles (requestor, personnel), to which person these roles are assigned (assigned), who processed (created) the request, and the time of processing. If comments are added when viewing / approving the request, they would also be displayed here.

Form	Progress Varial	oles							
Rol	e	Activity		assigned to	Actual Performer		Started on	Finished at	Comments
Req	uestor	Fillout Form	•	Rosso Cloudia	Rosso Cloudia	☆	May 20, 2021 2:59:27 PM	May 20, 2021 2:59:27 PM	
Vor	gesetzter	Approval	C	Renner Rudi			May 20, 2021 2:59:27 PM		

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