Use of the filter

This document demonstrates the **operation of the filter function** using the example of "Uncompleted requests¹". However, the same options are also available for "Open ToDos"

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

This function is available for

- every staff member for their own requests and processes
- owner of the role "Personal" for all employees within their area of competence
- owner of the role "Manager" for all employees within their area of competence
- local administrators for all employees of the organization

Open ToDos								
Perform marked actions	2 Refresh Selection	• • Q Show Filter	O Hide Progress					🔒 Print
ToDo assigned	,	Author of Process		\$ Activity	Details	Progress	Action(s)	

Now click on the button to open the input screen.

Open ToDos											
Perform marked	actions 2 Refresh	Selection •	Q Hide Filter	Ø Hide Progress							🖨 Print
Author of Process	Type to search for person	Creation date	a from	#	to		Apply Filter				
	Type to search for group				to		Apply Filter				
	Type to search for process	-	Action	~							
ToDo assigned		▼ Author	r of Process			Activity		Details	Progress	Action(s)	

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.

The "Open ToDos" area contains an additional filter function: the status of the task can be selected under "Selection".

Open ToDos				_					
🕴 Perform marked	actions	2 Refresh	Selection -	Q Hide Filter	O Hide Progress	s			
			✓ Approval						
Author of Process	Type to se	earch for person	-	e from		to	1	Apply Filter	
Group	Type to se	earch for group		e from	6	to			
Process	Type to se	earch for proces	 Delete Revert selection 	Action		~			
_									
ToDo assigned			▼ Autho	r of Process			♦ Activity		Detail

After selecting at least one search criterion, the "Apply filter" button can be clicked

uncompleted Requests						
9 Perform marked	actions 2 Refresh Q H	lide Filter 🛛 Ø Hide Pr	ogress			
Author of Process	Adam Angelika (SuW22032801)	Creation date from	01.05.2023	to 01.06.2023	🖀 Apply Filter	
Group	Type to search for group	Effect date from	m	to	*	
Process	Holiday (Urlaub_PerProf)					

By clicking on "**Apply filter**" the result list appears according to the search criteria. By using the "**History Off**" or "**History On**" button, the history can be shown/hidden in the result list.

ncompleted Requests Perform marked actions © Refresh	Q Hide Filter Ø Hide Progress	L		ê Pri
Author of Process Adam Angelika (SuW22032 Group Type to search for group Process Holiday (Urlaub_PerProf)	Creation date from 01.05.20 Effect date from	223 to 01.06.2023	Apply Filter	
ate of application	v Performers	Details	Progress	1 Entry Lines: 10
un 1, 2023 :33:31 PM	Sonne Susanne Wind Werner	• Vacation Absenceentry vacation fullday Jul 1, 2023 - Jul 2, 2023 Details	☆ Adam Angelika	☐ 章 Delete
				1 En

After any editing of the items on the filter list, the list can be updated by clicking the "**Update**" button. The explanation of displaying the process **details** can be found here².

Details					
Vacation					
Absenceentry vacation fullday Jul 1, 2023 - Jul 2, 2023 Details					

- $1. \ /daisy/personal wolke-default-en/Time-Base/10064-dsy/wf_getMyOpenRequests.act.html$
- 2. /daisy/personalwolke-default-en/Time-Base/10064-dsy/10074-dsy.html