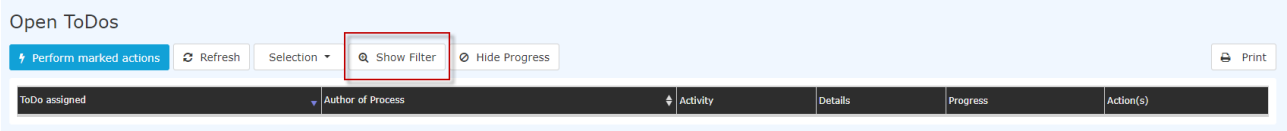
Use of the filter

This document demonstrates the **operation of the filter function** using the example of "Uncompleted requests[1]". However, the same options are also available for "Open ToDos"

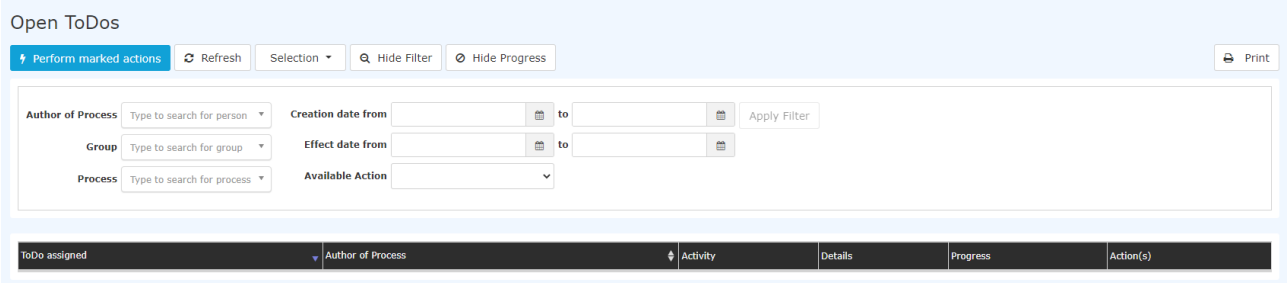
The **filter function** (Show Filter) allows you to search for specific requests in the workflow lists.

This function is available for

- every staff member for their own requests and processes
- local administrators for all employees of the organization



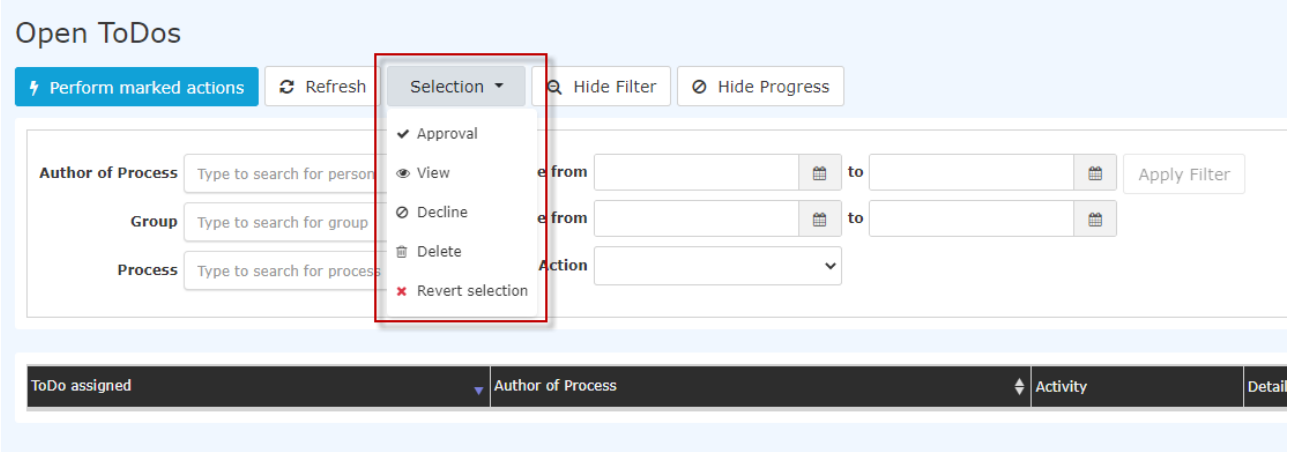
Now click on the button to open the input screen.



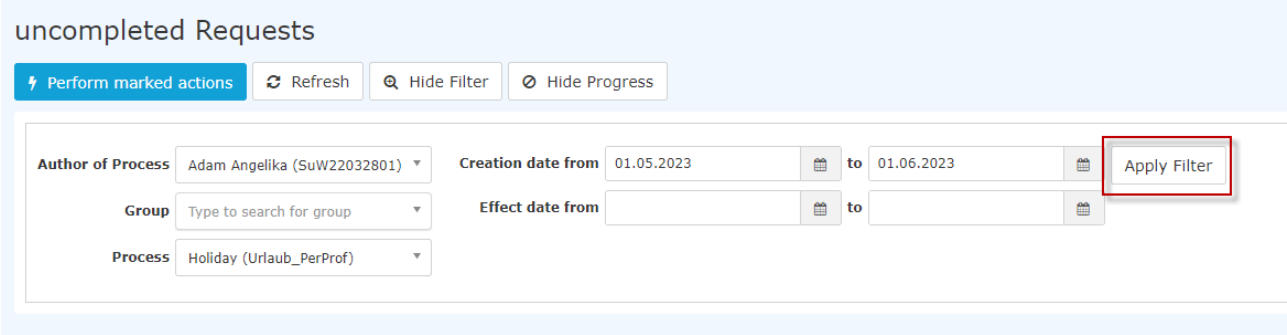
Using the following parameters (search criteria) you can then search for the relevant request:

- **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.

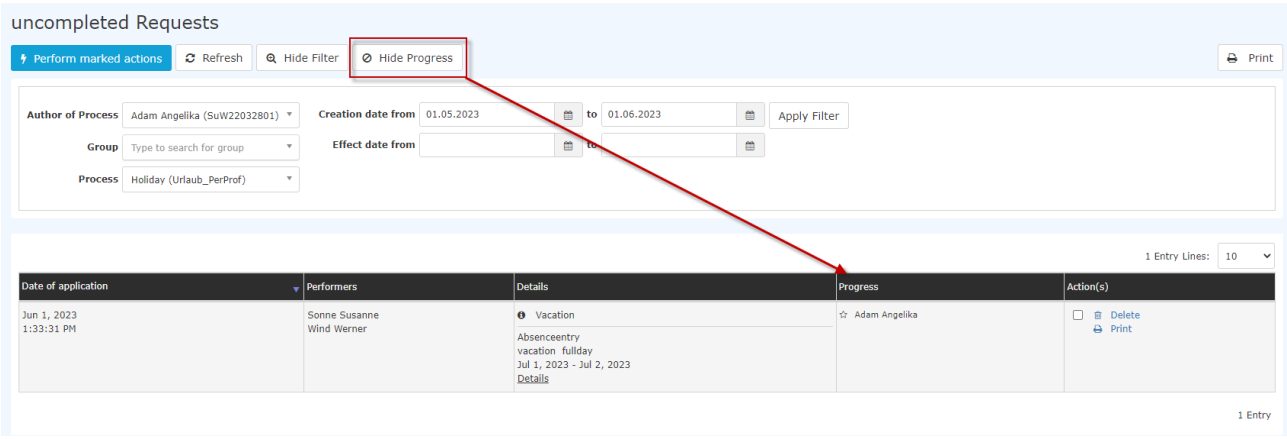
The "Open ToDos" area contains an additional filter function: the status of the task can be selected under "Selection".



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



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.



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 here[2].



1. /daisy/webdesk-manual-admin/5878-dsy.html?language=4
2. /daisy/webdesk-manual-admin/10074-dsy.html?language=4