Workflow

The menu items integrated in the menu bar "**Workflow"** allow every user to trace the process of their own application forms, to edit the assigned To Dos, and serve as an archive for already completed applications and assigned To Dos.

General information about the Workflow-Lists

Handling of the filter functions

- The filter functions allow a purposeful query for certain application forms within the Workflow lists
- Select the respective list (e.g. Open requests or Open ToDos) > click on the "Show Filter" button (to find in the title bar)

You can search for a specific application form with the help of following criteria:

- **Applicant**
  Search for a respective applicant (= author of process) by selecting the person from the list. You can also search for "All Persons"
- **Group**
  Search for a respective group, or search in all groups
- **Process**
  Search for a respective application form (= process), e.g. absences, compensation time. If you want to search for all applications of a respective person, select "All processdefinitions"
- **Date of creation**
  Search for applications, created on a respective date. You can either enter from - to date, or only from-date or to-date.
- **Date of effect**
  All applications, which effect starts on a respective date, will be delivered. Analogue to the date of creation, you can enter either from - to date, or only one of them.
- **Available Action** (only in the list "Open ToDos")
  Shows only those To Dos for which the selected action (e.g. approve or view) is possible
- **Person in Charge** (only in the To Do lists and only for users with view permission for other persons)
  Search for the To Dos of a respective person
- **Query for possible Participants** (only in the list "Completed to-dos")
  If checked, To Dos completed by deputies are shown as well

A click on the "Apply Filter" button starts the query for all applications, according to your criteria. If a filter is active, it can be reset with the "Clear Filter" button. "Refresh" reloads the list.

If you want to hide the filter , so click on the "Hide Filter" button.

In order to hide the "process" column, click on the "Hide process" button. If you want the column to reappear, use the "Show process" button.

Handling several requests at once

In the lists "Open ToDos" and "Open requests" several entries can be handled at once: mark the desired action (e.g. approve, deny, view or delete) with the check box in front of the action of the single entries, or use the "Selection" button to mark all suitable entries at once. Then click on "Perform marked actions" to carry out all marked actions.

Process details

After you have found the application form, here you will find some information about the process. Click on the Info button for more details.

- **Overview**

General information about the request, such as applicant, process, time of creation and completion, and state.

- **Progress**
  Here you will find the roles involved in the process (as applicant, supervisor, ...), as well as the name of the person, inhabiting the role, who has already handled the application, the time of handling. If any comments are attached to an application, you will find them in the comment column.
- **Application form**
  Here you will find the summary of all process-relevant data (from-to date, absence reason, somment etc.)
- **Variables (optional)**
  Here you will find the relevant system-data and variables used in the process.
- **Graph (optional)**
  The graph provides a visual progress of the process (roles and actions involved).