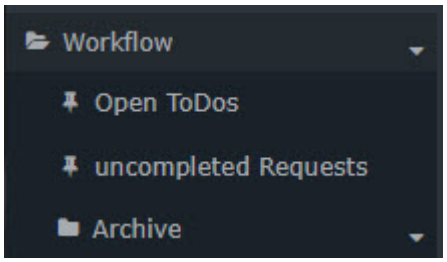
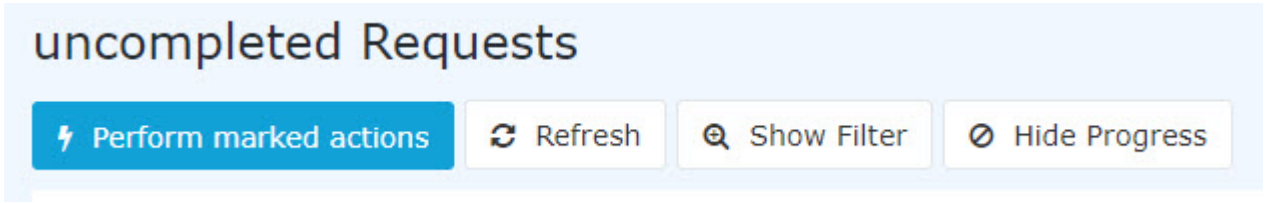
Archive

The menu items grouped under the **Workflow** menu are used to track the progress of your own requests and to process requests assigned to you, and they provide an archive for completed requests and finished tasks.

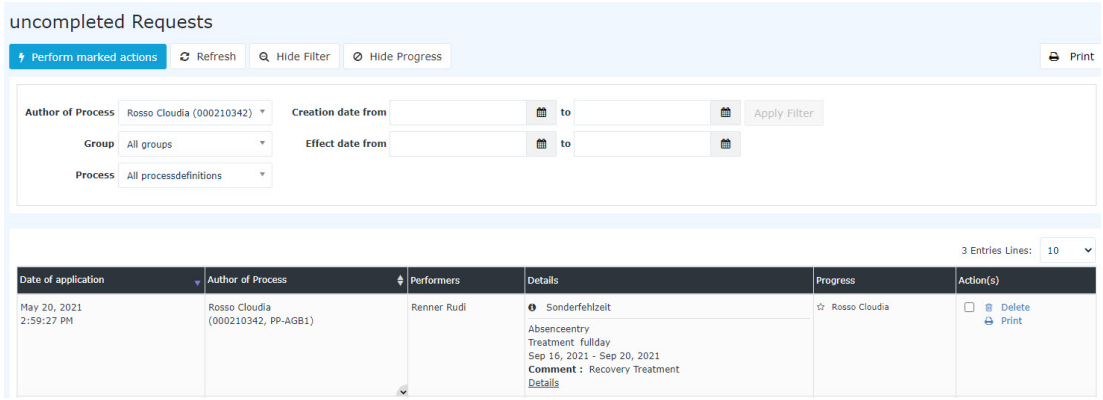


This document demonstrates **how to use the filter function** and the **history view** using the example of "Open requests[1]". However, the same options are also available under the remaining menu items of this sub-section.

Using the filter function



- The **filter function** allows you to search for specific requests in the workflow lists
- Open the desired list (e.g., open, assigned or completed requests) > click the "**Show filter**" button (located in the title bar).



You can then search for the desired request using the following parameters (search criteria):

- **Requester**
  Here you can search for a specific requester > select 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 particular person > process Vacation). If you want to see all requests, select "All processes" as the parameter
- **Creation date**

Search for requests with a specific creation date (you can enter either a from - to date, or, for example, only a to date to see all requests submitted up to a certain day)

- **Effective date**
  All requests whose period of effect is valid from the from date are displayed. You can additionally restrict the effective date with the to date parameter.

Clicking the "**Apply filter**" button searches for the requests according to the parameters and displays them.

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

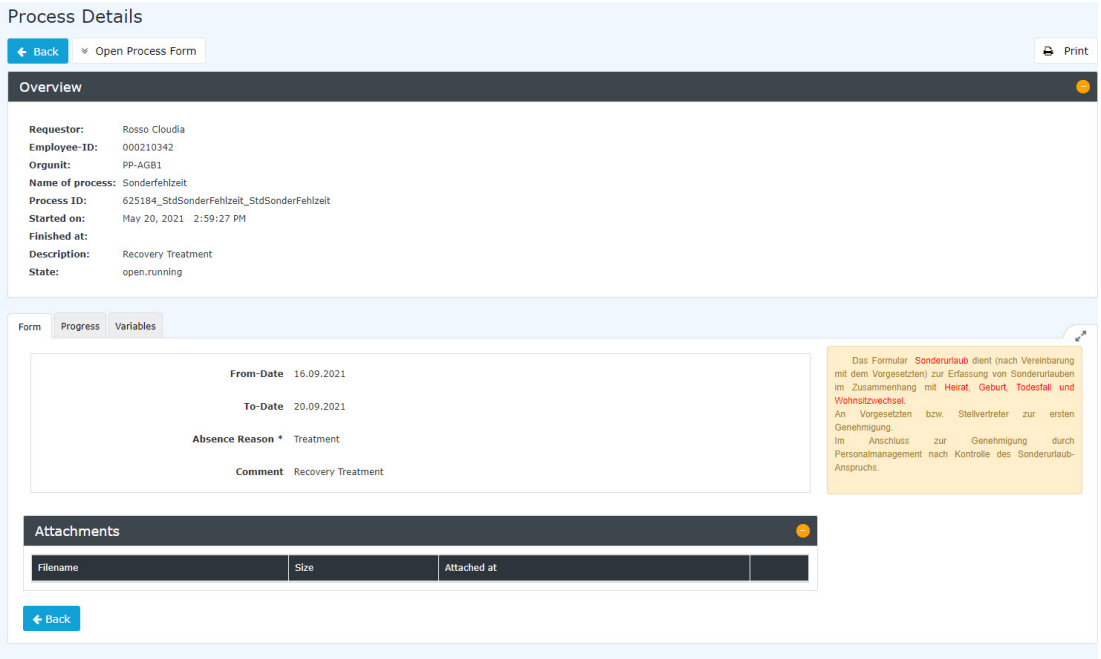
If the column with the process history should not be displayed in the request overview, click the "**History off**" button. If you want to see the column again, select "**History on**".

History view

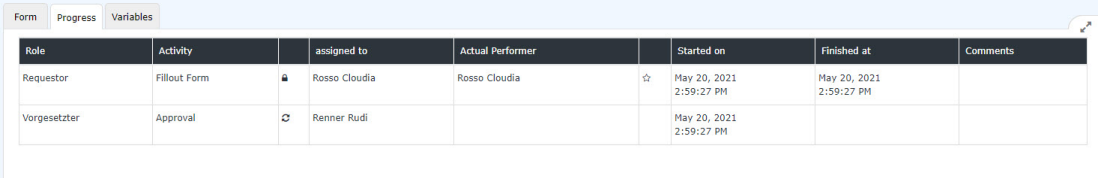
Once you have found the desired request using the filter parameters (search criteria), you can take a closer look at it using the info button (Details column):

Clicking the info button displays the following information:

- **Form**
  All data from the request form is summarized here. In addition to the request data itself (from-to date, absence reason, comment, etc.), there is also an overview of the current vacation entitlement and the number of vacation days remaining after the request is approved.



- **History**
  Here you can see the roles (requester, personnel), which person these roles are assigned to (assigned to), who processed/created the request (processor), and the time of processing. If comments are added when reviewing / approving the request, you would also see them here.



- **Variables**

The "Variables" tab contains a technical overview of variables and their values, each of which describes specific information about the request. This view has no specific function for the end user, since all the information it contains is clearly displayed elsewhere in the request - this tab is therefore only relevant for administrators or Workflow support.

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