Evaluation of requests

General

The evaluation of the requests provides an overview of the requests submitted in the company which can be printed out / exported to PDF / Excel using the buttons in the upper right corner of the screen

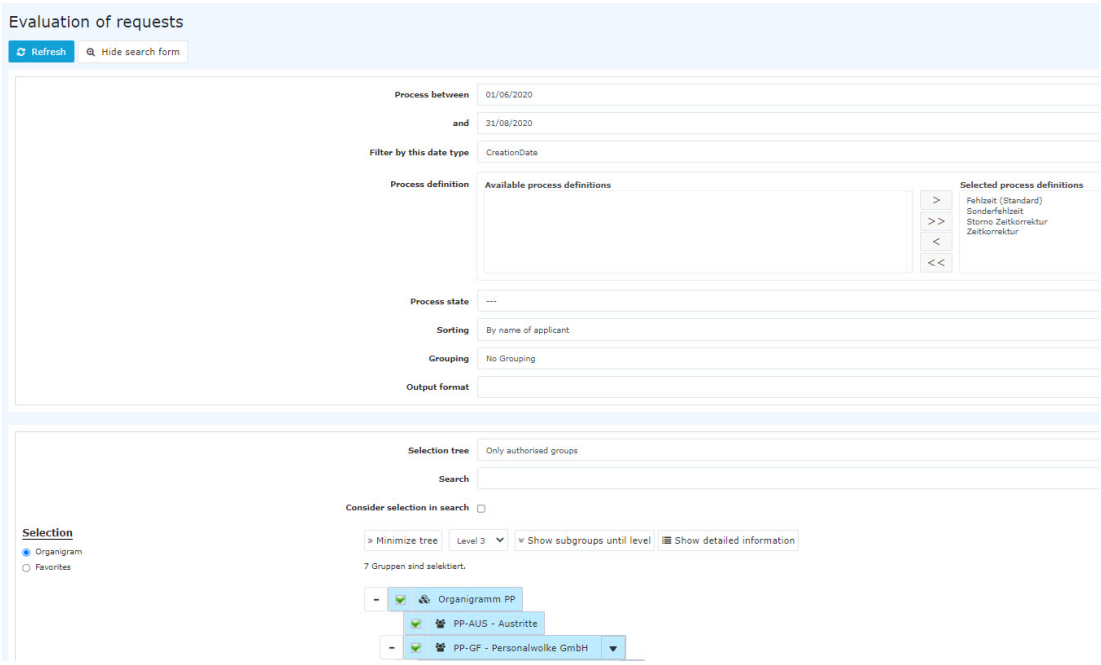


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Certain filter criteria can be defined via a search mask.

At the end of the list a summary is displayed which shows the total number of displayed process instances, the number of non-empty groups and a list of the group names contained in the list.

The search mask



Process between <Date From> and <Date To>

Here you can restrict the period for which the requests are to be evaluated.

Filter by the following date type

This parameter allows you to choose between CreationDate and Workflow variables.

- **CreationDate**: Refers to the creation date of the request.
- **Workflow variable**: Refers to the date specified in the request.

Process definition

This parameter allows you to restrict the request to a particular request type.

- **- - - (all)**: Displays all requests.
- **Absence time**: Display only absence time requests
- **Sick leave:** Display sick notifications only
- **Special absence time**: Display only special absence times

- **Cancellation time correction**: Display only cancellation time correction requests
- **Time correction**: Display time corrections only

Process-Status

This parameter allows the restriction to open or closed processes.

- **- - - (all)**: Displays open and closed requests.
- **Open**: Show only pending requests
- **Completed**: Only display completed requests

Sorting

This parameter controls the sorting of the evaluation result.

- **By name of applicant:** Sort by name of author.
- **By start date of process:** Sort by time of click on Start process
- **By process name:** Sort by process name.

Grouping

This parameter can only be changed if the Account parameter is set to Sick Days, Vacation Consumed or Attendance.

It allows you to choose between: No grouping, 1st level, 2nd level, 3rd level.

- **No grouping:** all users are displayed in alphabetical order.
- **1st level:** all selected groups and users are grouped below the 1st node and then displayed.
  - Example:
    - Selection of group PB --> Employees are displayed under PB, since PB is the highest node in the organizational chart.
- **2nd level:** analogous to the 1st level all users below the 2nd node are displayed here.
- **3rd level:** analogous to the 1st and 2nd level

Output format

Print, PDF, Excel

Selection tree

This parameter offers the following selection options: Groups with access authorization, All groups.

- **Groups with access rights:** Displays all groups that the user has access to.
- **All groups:** displays all groups of the company, even if the user is not authorized to view them all.

Search

If a search term is entered, the system searches in all groups for which access authorization exists. It is possible to search for a complete name (surname, first name) or for a part of the name. The result then contains all possible surnames as well as first names and is highlighted in color.

Include selection in search

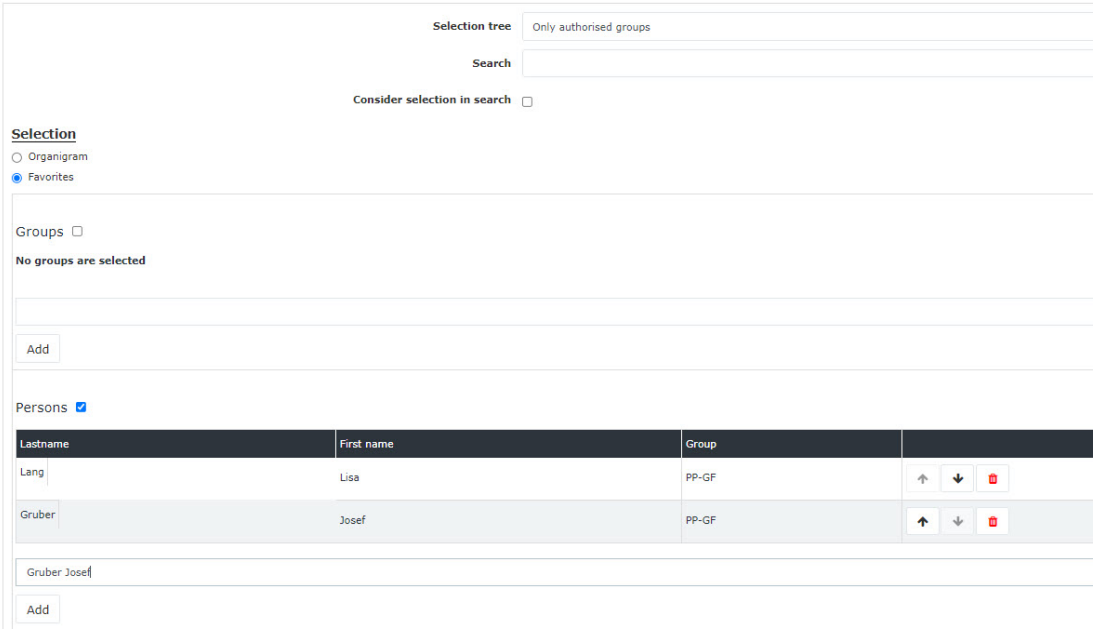
In principle, all groups for which access authorization exists are searched when an entry is made in the **Search** field.

If this option is checked, only the groups selected under **Selection** will be searched.

Selection

With this parameter, the user has the choice between organigrams and favorites, which can be created by the user himself.

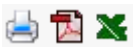
- **Organigram**
  - All folders marked with a plus (+) symbol can be expanded further to show the subunits.
  - By clicking on a unit, it will be checked. By **double-clicking**, all subunits are automatically checked.
  - by clicking on the green arrow > **Show subgroups to depth** (depth 1-3) > all existing subgroups are displayed
  - using the blue arrow > **Minimize tree** > this view is minimized again, only the parent groups seem to be on
  - **Show details** > By clicking on the symbol  , the selected groups are clearly displayed in a list to the right of the symbol. Click again to hide the detailed information.
  - Clicking the **query** button starts the search.
- **Favorites**
  Using this parameter, each user can create their own favorites list, which can contain both persons and groups that are frequently queried. The Favorites list can be customized at any time.



  - To **add a person to the favorites list** > click the blue arrow > select person > click the "Add" button
  - The order of the persons on the favourites list can be changed at any time using the arrow keys.
  - If you want to remove a person from the favorites list, click on the red delete icon to the right of the name.
  - The same applies to **groups**.

The Result

The **Requests evaluation** displays an overview of the requests entered in the system. Click on



to print the list or export it as a PDF or Excel document.

Explanation of the individual table columns:

- **Author**
  the name of the applicant.
- **Start date**
  The start date of the process
- **process definition**
  what kind of motion is it?
- **from**
  Start date of request submitted
- **until**
  End date of request submitted
- **Description / Comment**
  the optional comment entered by the employee when making the request

Click on



to go directly to the **details of the selected request**.

At the end of the list, a summary is displayed containing the total number of displayed process instances, the number of non-empty groups and a list of the group names contained in the list.