How to search for active workflows – Authoriser and Initiator tasks

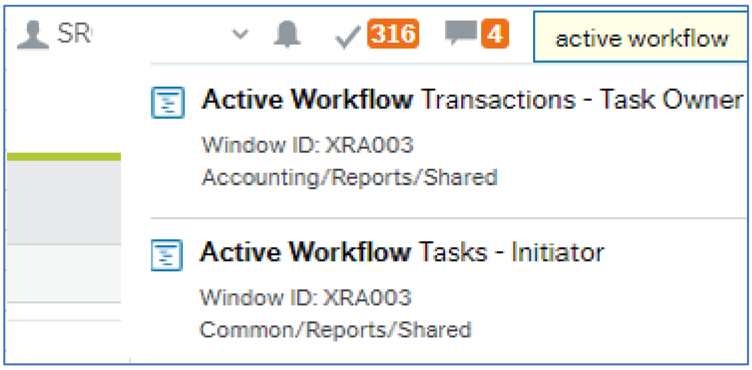
There are two report available in Business World to help you find active workflow tasks. These reports can either show you the tasks that you have created and where they are in the workflow or tasks that you have received to action.

Active Workflow Tasks – Initiator is a report that will show you all tasks that you have created (initiated). This can include tasks like:

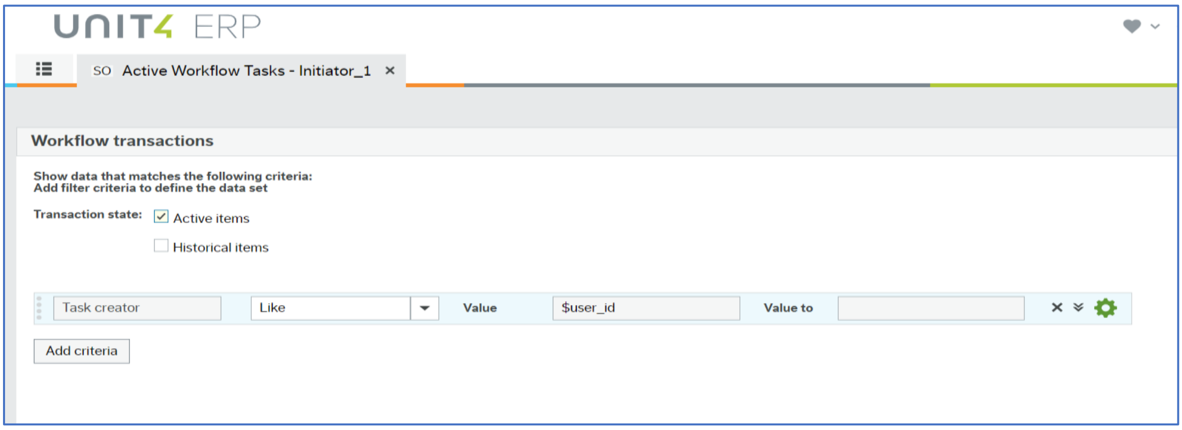
- **Incoming invoices i.e. payment without invoice transactions or supplier invoices, missing goods received**
- **Requisitions**
- **Sales order credit notes**
- **Timesheets**
- **Landscape Work Request**
- **Invoice proposal (for Landscape or Pest Control)**
- **Absence**
- **Travel Expenses (includes all expenses)**
- **Contract Change Form**
- **Position Form**
- **Variable payments and deductions PAY**
- **New supplier request form**
- **New customer**

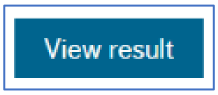
Active Workflow Transactions – Task Owner is a report that will show you all the tasks that are with you for action. This can also include the tasks mentioned in the list above.

1. To find the report enter either: "**Active Workflow Tasks – Task Owner**" or "**Active Workflow Tasks – Initiator**" into the search bar (top right corner of the menu screen) and click on the report that you want to view.



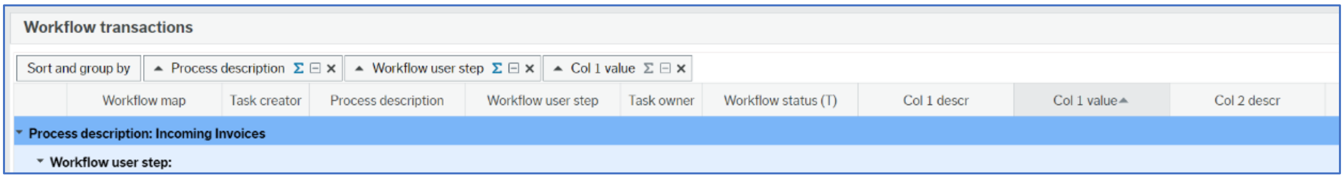
You will then be presented with a report screen like the one's shown below;



2. Both reports are set to look at your userID , so you just need to click on the 

button (located bottom left corner of the screen) to start the search.

3. You will then be presented with the results screen which will show you all the active tasks you have created or that you have to action:



The report is grouped on the type of task. A list of what the columns contain is shown below:

<table>
<tr><td>Workflow map</td><td>The icon  allows you to view the workflow map for the task</td></tr>
<tr><td>Task Creator</td><td>The person that created (initiated) the task</td></tr>
<tr><td>Process description</td><td>The type of task e.g. journals, incoming invoices, requisitions, absence etc.</td></tr>
<tr><td>Task Owner</td><td>The person that currently has the task to action</td></tr>
<tr><td>Workflow Status</td><td>Will be “Active”. The report is set to show all active tasks and not those that have been completed</td></tr>
<tr><td>Col1_descr</td><td>Various workflows will populate different information in some fields depending on the type of task as shown in the “process description” column, as a result some columns are fluid and use describers such as ‘col 1 val or ‘col 3 descr’, this represents different values and descriptions depending on the various workflows and how they populate</td></tr>
<tr><td>Col1_Value</td><td>As above
For process description:
<table>
<tr><td>Journals</td><td>Transaction number</td></tr>
<tr><td>Supplier request form</td><td>Form number</td></tr>
<tr><td>Requisitions</td><td>Requisition number</td></tr>
<tr><td>Sales Ordering</td><td>Credit note number</td></tr>
</table>
This is not an exhaustive list</td></tr>
<tr><td>Col2_descr</td><td>Various</td></tr>
<tr><td>Col2_value</td><td>Process description:
<table>
<tr><td>Purchase orders</td><td>PO number</td></tr>
<tr><td>Missing goods received</td><td>Transaction number</td></tr>
<tr><td>Purchase invoices</td><td>Transaction number</td></tr>
<tr><td>Supplier invoices</td><td>Transaction number</td></tr>
</table>
This is not an exhaustive list</td></tr>
</table>

4. If you have any issues understanding the information presented or have further questions or feedback, please do not hesitate to contact the Business World inbox at bw.help@southampton.gov.uk.