

## OM Workflow Report

You may access the OM Workflow Reports by entering **zom0178** in the Command field.

The requested Workflow Report is displayed. See the example below of the OM Workflow Report screen.

### OM Workflow Report

The screenshot displays the 'OM Workflow Report' interface. It features a 'Selection' section with a 'Position ID' field and a search icon. Below this is an 'Additional data' section with four rows: 'Action', 'Personnel area', 'PCR ID', and 'PCR WF Approval Level'. Each row has a 'to' field and a search icon. The 'Output options' section includes an 'ALV Layout variant' field.

## WORKFLOW REPORT SEARCH CRITERIA

The Workflow Reports can only be run for those entities for which you have security. You can run the report for your entire agency *if* you have that security access. The Workflow Report can also be run for smaller groups or for an individual PCR.

### DATA SEARCH OPTIONS

For **OM** you can search by:

- Position ID
- Action
  - Refer to the **OM Position Actions Job Aid** located on the BEACON University Help website for a list of the available options for this field.
- Personnel area
  - For those for which you have security access
- PCR ID (if you know it)

- PCR WF Approval Level
  - Use the drop-down menu to select the workflow approval levels.



Multiple Selection icon

In the Selection and the Additional Data sections you can perform the search using multiple selection criteria to broaden your output.

to

Data Range fields

In the Additional Data section you can perform search using individual data or even a range of data.

Output options  
ALV Layout variant

Variant List field

You can also create and run ALV Layout Variants. This job aid will explain how to set up your ALV Layout Variant later in the document.

## EXECUTING THE WORKFLOW REPORT

1. Determine the search criteria data needed for your report.
2. Enter the data in the various fields.
3. Click  (Execute) to perform the search.

Here is an example of a report using the following data search criteria:

- Action **103** (Reallocate Up Action)
- PCR Approval Level: **FA1**

OM Workflow PCR List															
Action text	WF Approval Lvl	WF Status	Position Title	Effective Date	Processed	PCR ID	Act	PA	Org Unit	Creator ID	Position N	PCR Creati	PCR Cre	WF St	WF
Reallocate Position Up	Funding Approval	In Process	Youth Counselor Super	11/01/2009	11/05/2009	51	103	01	20	10	60	11/05/2009	17:46:02	N	FA1
Reallocate Position Up	Funding Approval	In Process	WIA Youth Counselor A	09/25/2009	09/25/2009	51	103	01	21	10	60	09/25/2009	14:25:00	N	FA1
Reallocate Position Up	Funding Approval	In Process	WIA Youth Counselor	09/25/2009	09/25/2009	51	103	01	21	10	60	09/25/2009	14:04:58	N	FA1
Reallocate Position Up	Funding Approval	In Process	Youth Counselor	09/25/2009	09/25/2009	51	103	01	21	10	60	09/25/2009	14:20:11	N	FA1
Reallocate Position Up	Funding Approval	In Process	Youth Counselor Super	09/29/2009	09/29/2009	51	103	01	21	10	60	09/29/2009	13:36:20	N	FA1
Reallocate Position Up	Funding Approval	In Process	Youth Counselor	11/19/2009	11/19/2009	51	103	01	20	10	60	11/19/2009	14:11:44	N	FA1

MANAGING THE LAYOUT VIEW

After you run the OM Workflow Report, you will see the following toolbar with buttons:



Layout Management Options:

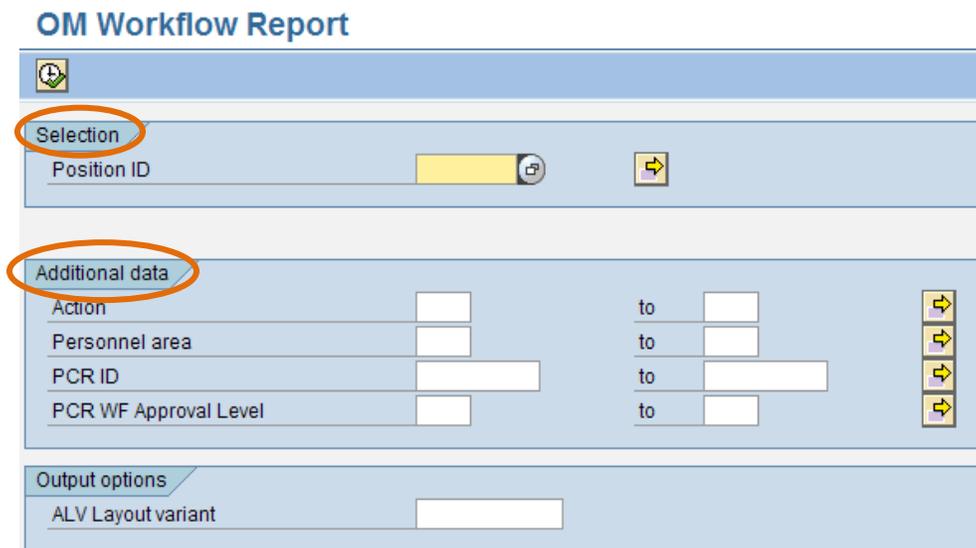
-  Change layout icon
-  Select layout icon
-  Save layout icon

EXECUTING, CHANGING, AND SAVING THE LAYOUT OF A REPORT

The following actions will be demonstrated in this section:

- How to search for OM Actions
- How to search in Personnel area 4601
- How to execute the report
- How to change the layout
- How to save the layout as a variant

1. Type **ZOM0178** in the Command field and press Enter to access the OM Workflow Report.



2. Enter your search criteria in the fields of your choosing in the **Selection** and **Additional data** sections of this screen.

**NOTE:** You will only see what your system security will allow you to see.

**OM Workflow Report**

**Selection**

Position ID

**Additional data**

Action  to

Personnel area  to

PCR ID  to

PCR WF Approval Level  to

**Output options**

ALV Layout variant

3. Click the **Execute** button.

Agency	Action text	WF Approval Lvl	WF Status	Creator Name	Position Title	Effective Date	Processed	PCR ID	Act	PA	ObjectID	Org Unit	Creator
	Reallocate Position Up	Funding Approval	In Process		Office Assistant IV	11/01/2008	12/04/2008		103	01		2	
	Reallocate Position Up	Funding Approval	In Process		Accounting Clerk IV	01/01/2009	01/11/2009		103	01		2	
	Reallocate Position Up	Funding Approval	In Process		Health Care Technician I	01/11/2009	01/11/2009		103	01		2	
	Reallocate Position Up	Funding Approval	In Process		Foreign Language Inter II	10/01/2008	10/08/2008		103	01		2	
	Reallocate Position Up	Funding Approval	In Process		Probation/parole Officer I	12/01/2008	01/09/2009		103	01		2	
	Reallocate Position Up	Funding Approval	In Process		Probation/parole Officer I	11/25/2008	01/09/2009		103	01		2	
	Reallocate Position Up	Funding Approval	In Process		Probation/parole Officer I	11/25/2008	01/09/2009		103	01		2	
	Reallocate Position Up	Funding Approval	In Process		Probation/parole Officer I	11/25/2008	01/09/2009		103	01		2	

4. Click the **Change layout** icon . A pop-up box is displayed.

There are five tab options on the Change Layout box.

- **Displayed Colu tab**– Displays the fields included on the current report. If you want a different layout, you can adjust your display by moving the columns to the right column to “hide” them from the display.

-  Highlight an item in the **Displayed Columns** list and move it to the **Column set** list
-  Highlight a **Column set** item and move it to the **Displayed Columns** list
-  Move the highlighted item up in the order (moves the column to the left on the report)
-  Move the highlighted item down in the order (moves the column to the right on the report)
-  Move the highlighted item to the top of the list (to the left of the report)



Move the highlighted item to the bottom of the list (to the right of the report)  
 Helps to search for a field

- **Sort Order tab** – Displays the currently sorted fields on the left and the set of available fields on the right. (also available under the **Sort** buttons ).

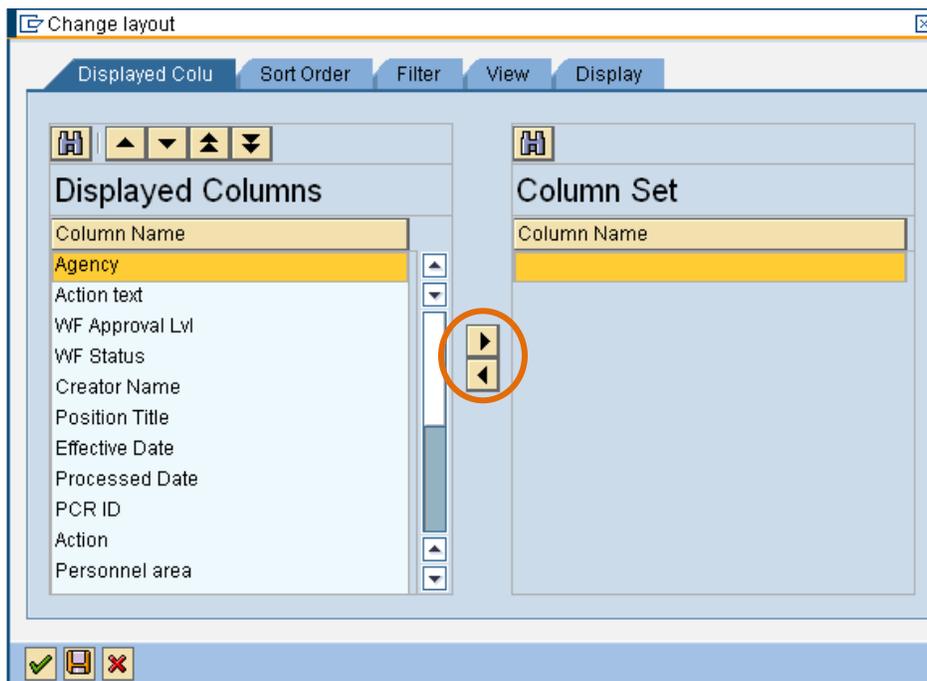


Ascending order filter



Descending order filter

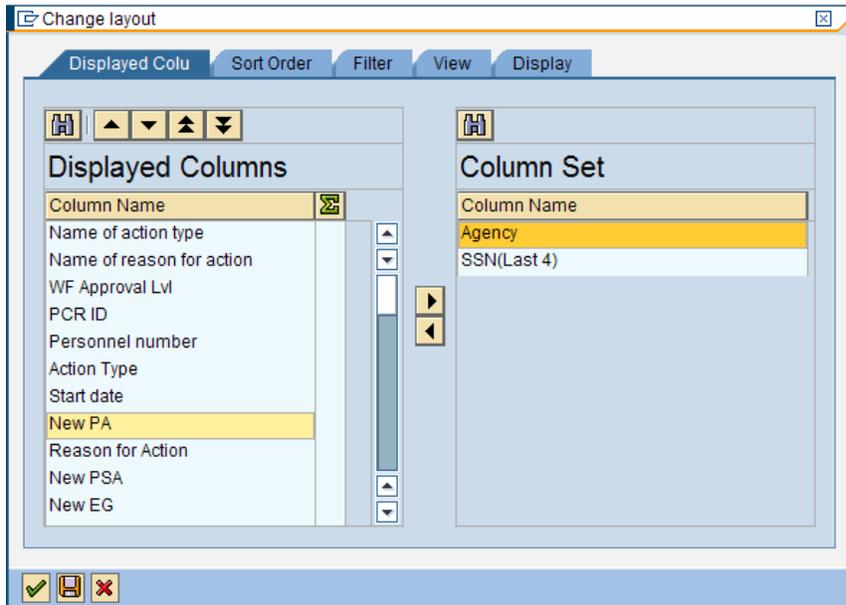
- **Filter tab** - The fields currently filtered on are shown on the left, the set of available fields are shown on the right (also available under the filter button ).
- **View tab** - allows the user to choose various data views
- **Display tab** - allows various data views



5. Select any columns you do not wish to see on this report by highlighting the column name in the Displayed Columns list and either double-clicking or clicking the Hide selected columns button



located in between the column sets.



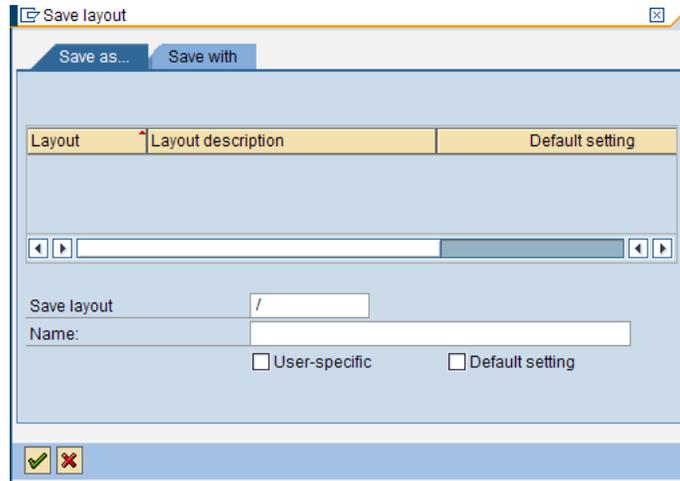
- Once you have selected which columns you do not wish to see, click on the green check mark at the bottom left of the pop-up box. The report redisplay with the column set you have selected.

Action text	WF Approval Lvl	WF Status	Position Title	Effective Date	Act.	Position N	WF Status	WF Level	PCR Cha
Reallocate Position Up	Funding Approval	In Process	Office Assistant IV	11/01/2008	103		N	FA1	12/04/2008
Reallocate Position Up	Funding Approval	In Process	Accounting Clerk IV	01/01/2009	103		N	FA1	01/11/2009
Reallocate Position Up	Funding Approval	In Process	Health Care Technician I	01/11/2009	103		N	FA1	01/11/2009
Reallocate Position Up	Funding Approval	In Process	Foreign Language Inter II	10/01/2008	103		N	FA1	10/08/2008
Reallocate Position Up	Funding Approval	In Process	Probation/parole Officer I	12/01/2008	103		N	FA1	01/09/2009
Reallocate Position Up	Funding Approval	In Process	Probation/parole Officer I	11/25/2008	103		N	FA1	01/09/2009
Reallocate Position Up	Funding Approval	In Process	Probation/parole Officer I	11/25/2008	103		N	FA1	01/09/2009
Reallocate Position Up	Funding Approval	In Process	Probation/parole Surveillance Officer	11/20/2008	103		N	FA1	01/09/2009

- You may wish to rearrange the order of the columns as they are displayed. Position your mouse over the top of the column you wish to move until the cursor changes to a dark down arrow. Single-click to highlight that column. In the following example we have highlighted the Act. Column.
- Position your cursor over the title of the column and drag it to where you want it to display. A red line will indicate when you are where you want the column to be moved. Release the mouse and your column will move to that position.

Position	Position Title	Act.	Action text	WF Status	WF Status	WF Level	WF Approval Lvl	Effective Date	PCR Cha
60	Office Assistant IV	103	Reallocate Position Up	N	In Process	FA1	Funding Approval	11/01/2008	12/04/2008
60	Accounting Clerk IV	103	Reallocate Position Up	N	In Process	FA1	Funding Approval	01/01/2009	01/11/2009
60	Health Care Technician I	103	Reallocate Position Up	N	In Process	FA1	Funding Approval	01/11/2009	01/11/2009
60	Foreign Language Inter II	103	Reallocate Position Up	N	In Process	FA1	Funding Approval	10/01/2008	10/08/2008
60	Probation/parole Officer I	103	Reallocate Position Up	N	In Process	FA1	Funding Approval	12/01/2008	01/09/2009
60	Probation/parole Officer I	103	Reallocate Position Up	N	In Process	FA1	Funding Approval	11/25/2008	01/09/2009
60	Probation/parole Officer I	103	Reallocate Position Up	N	In Process	FA1	Funding Approval	11/25/2008	01/09/2009
60	Probation/parole Surveillance Officer	103	Reallocate Position Up	N	In Process	FA1	Funding Approval	11/20/2008	01/09/2009

- Click the **Save layout** icon  to save this layout to display each time you run this report. The Save layout pop-up box is displayed.



- Enter a short description in the **Save layout** field to identify the layout design.

**NOTE:** If you want this layout to be user-specific, you must begin the layout name with a **Z**.

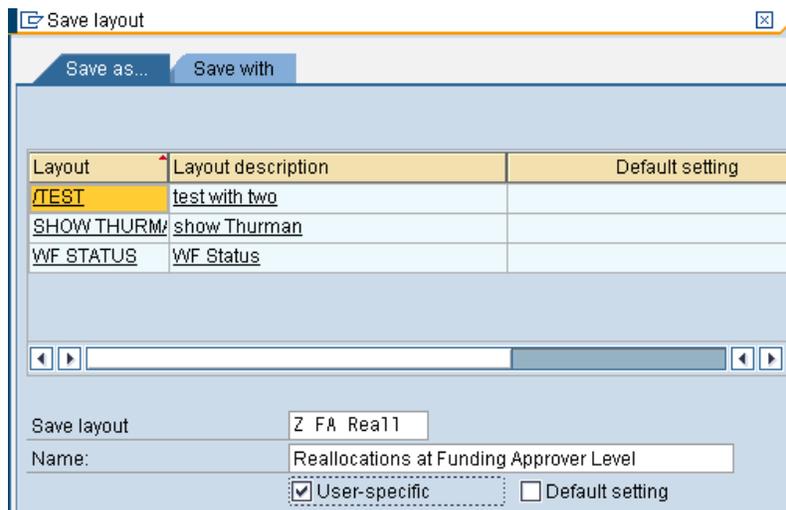
- Enter a more descriptive name for the layout in the **Name** field.

- Check the **User-specific** checkbox if you want this layout design to be restricted to your user ID.

**NOTE:** If you want this layout to be user-specific (i.e. only you can access), begin your name with a “Z” and select “user specific”. The Default settings allow all who have security to run the report using this layout. It also enables them to change the layout.

- When you have completed entering the fields on the Save layout box, click the green check mark

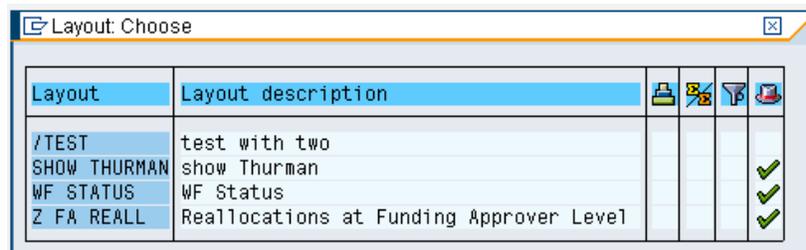
 in the lower left hand corner of the box to save your layout design.



You have just created an ALV Variant layout.

**RETRIEVING AN ALV VARIANT LAYOUT OF A REPORT**

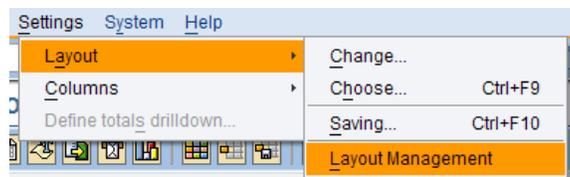
1. To retrieve an ALV Variant for a report, complete the search criteria fields in the **Selection** (Position ID) and **Additional data** sections of the report screen.
2. Click on the matchcode in the **ALV Variant** field. The **Layout: Choose** pop-up selection box is displayed showing layout options.



3. Click on the layout you wish to see and click Execute to run the report. The report will display with the applied variant layout.

- If you forget to select the variant prior to executing the report, you can still apply it once you are in the report by clicking on the **Select layout** icon . The **Choose layout** selection box is displayed with the available options. Click on the layout you wish to see. The layout is then applied.
- If you want to change the current view to another view, you can also do that by using the **Select layout** icon to apply that view in the current report.
- You can set the default layout view by accessing the following menu path:

*Settings > Layout > Layout Management*



- You can select the default setting you want to display each time your report is run. Do this by clicking in the **Default setting** field next to layout you choose.

Layout: Management

Layout	Default setting	Layout description
ZPAACTCOL	✓	Action code follows the Name-reason col
ZPASIMPLE		Limited view

WF APPROVAL LEVEL CODES

Level Code	Level Description	Conditions
ICRE	Awaiting Initiator PCR Initiation	Coded in both screen Tranx programs when PCR is first created (D)
IREJ	Awaiting Initiator Resubmission	After rejected waiting for Initiator to <b>“Resubmit”</b> or <b>“Cancel PCR”</b>
DA1	Division Approval	Waiting for Division Approval
AA1	Agency Approval	Waiting for Agency Approval
FA1	Funding Approval	Waiting for Funding Approval
OA1	OSP Approval	Waiting for OSP Approval
BA1	OSBM Approval	Waiting for Budget Approval
SOM	OM Shared Services Approval	Waiting for Shared Service Approval and/or processing
CREJ	Complete – Rejected	Initiator <b>“Cancels PCR”</b> after a Rejection
CAPR	Complete – Approved	After all approved ( <i>Main</i> ) and after Shared Services Approval