

MyView Dashboard Guidance

Form History User Guide

Reviewed March 2021

carmarthenshire.gov.wales

Cyngor **Sir Gâr**
Carmarthenshire
County Council



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Form History

Displaying All Forms:

The Form History Module allows you to monitor the progress of any form you have created in MyView. The module will show the current status of any of your forms (Open, Authorised, Rejected or Submitted).

Login to MyView, on the Dashboard screen **Select Form History**.

The screenshot shows the 'Form History' page in the MyView system. The page has a dark blue header with 'Employee Search' and a user profile icon. A left-hand navigation menu lists various modules, with 'Form History' selected. The main content area features a search bar with 'Keyword Search', 'Date From', and 'Date To' fields. Below this are 'Event Filter' and 'Status Filter' sections. The 'Event Filter' includes buttons for 'Absence', 'Employee Photo', 'Expense Claims', 'Holiday', 'Holiday Cancellations', 'Holiday Entitlement Requests', 'Next of Kin', 'Personal Details', 'Relationship Details', 'Sickness', and 'eForms'. The 'Status Filter' includes 'Authorised', 'Open', and 'Withdrawn'. A 'Search' button is located at the bottom right of the filter section. Below the filters, there is a 'Results per page' dropdown set to '20' and a pagination control showing '1' of 2 pages. The main data area is a table with the following columns: 'Description', 'Event', 'Status', and 'Raised Date'. The table contains two rows of data:

Description	Event	Status	Raised Date
0011237 - MS EMMA HUGHES - postage test	Expense Claims	Open	1 Mar 2021
Holiday Granted: MS EMMA HUGHES (19/02/2021 - 26/02/2021)	Holiday	Authorised	27 Jan 2021

The Description displays the form name and your name. The dates are displayed for any leave and absence request are also shown here.

The Event is the form type.

Status displays the current status of the form.

Raised Date indicates when the form was last updated.

Filtering Forms:

Keyword Search

To reduce the number of forms displayed by setting filters or searching by Keywords:

The screenshot shows the 'Form History' page in the 'Employee Search' system. The 'Keyword Search' field contains the text 'holiday' and is circled in red. The 'Date From' and 'Date To' fields are empty. The 'Event Filter' dropdown is set to 'All Events'. The 'Status Filter' dropdown is set to 'All Statuses'. The 'Search' button is circled in red. Below the search filters, there is a table with the following data:

Description	Event	Status	Raised Date
0011237 - MS EMMA HUGHES - postage test	Expense Claims	Open	1 Mar 2021
Holiday Request MS EMMA HUGHES (19/02/2021 - 26/02/2021)	Holiday	Authorised	27 Jan 2021

In the **Keyword Search** box enter a form type e.g., holiday. **Click** the **Search** button. Anything that matches the keyword search will display below in the Results page.

Date Search

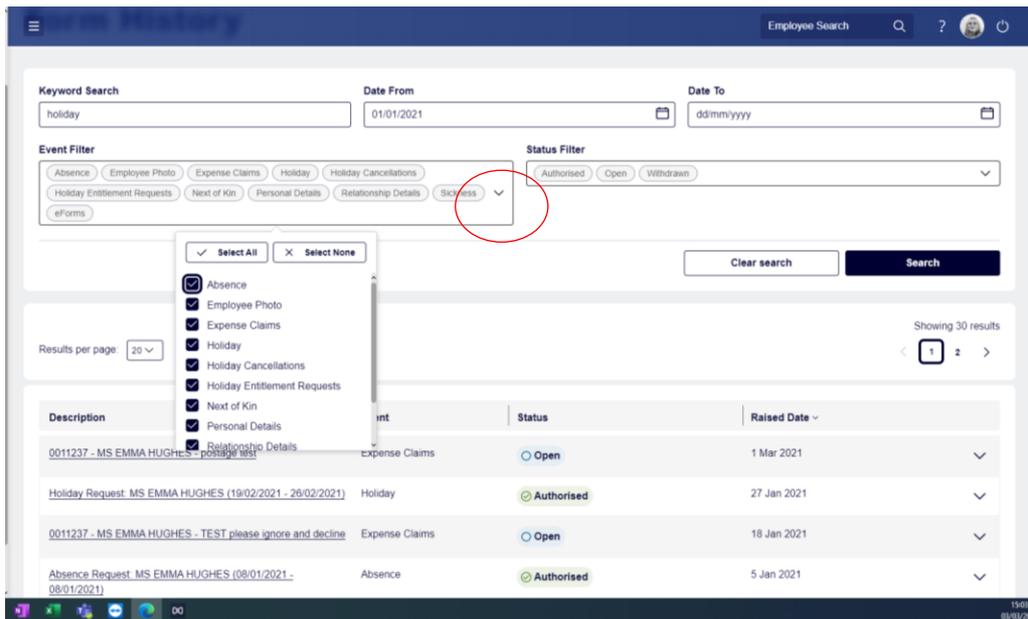
To search for forms submitted/acted on for a specific time or over a period. **Enter** the dates in the **Date From** and if required, the **Date To** fields.

The screenshot shows the 'Form History' page in the 'Employee Search' system. The 'Keyword Search' field contains the text 'holiday'. The 'Date From' field contains the date '01/01/2021' and is circled in red. The 'Date To' field is empty. The 'Event Filter' dropdown is set to 'All Events'. The 'Status Filter' dropdown is set to 'All Statuses'. The 'Search' button is circled in red. Below the search filters, there is a table with the following data:

Description	Event	Status	Raised Date
0011237 - MS EMMA HUGHES - postage test	Expense Claims	Open	1 Mar 2021
Holiday Request MS EMMA HUGHES (19/02/2021 - 26/02/2021)	Holiday	Authorised	27 Jan 2021

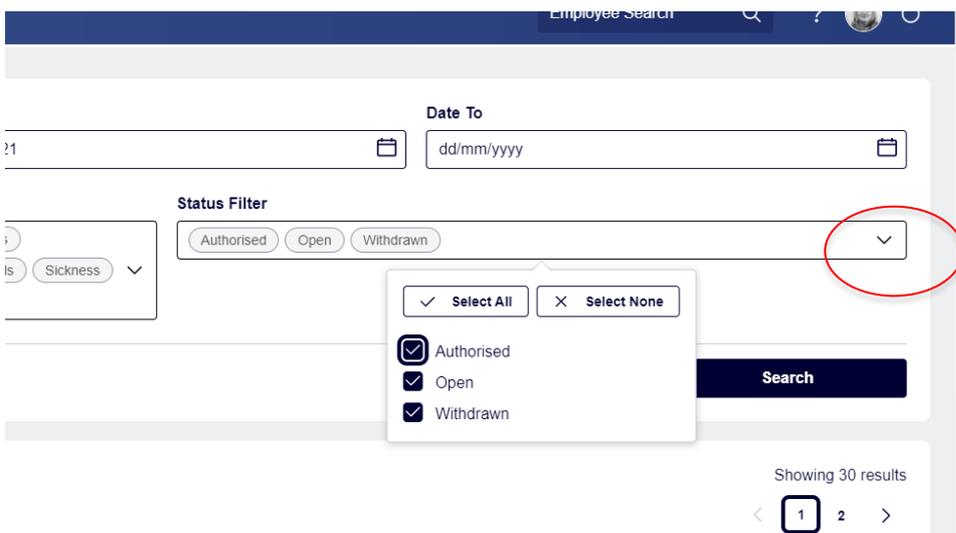
Filtering Event

To filter for the form type required for viewing. **Click the down arrow** to the right of the Event Filter (forms that have been completed in your record). **Tick/untick** the forms you wish/don't wish to view. **Click Search**



Filtering Status

To filter on the status of the forms. **Click on the down arrow to the right of the Status Filter** and then **tick/untick** the status of the forms you wish/don't wish to view. **Click Search**.



Click Clear Search if you want to reset the filters you have applied.

Viewing the Authorisation Details

To check the progress of a form and view by who and when a form has been authorised, or who the form is sitting with for authorisation. Click on the arrow pointing down on the right of each form created.

Employee Search

Dashboard / Form History

Form History

Keyword Search: holiday Date From: 01/01/2021 Date To: dd/mm/yyyy

Event Filter: Absence, Employee Photo, Expense Claims, Holiday, Holiday Cancellations, Holiday Entitlement Requests, Next of Kin, Personal Details, Relationship Details, Sickness, eForms

Status Filter: Authorised, Open, Withdrawn

Showing 30 results

Description	Event	Status	Raised Date
0011237 - MS EMMA HUGHES - postage test	Expense Claims	Open	1 Mar 2021
Holiday Request MS EMMA HUGHES (19/02/2021 - 26/02/2021)	Holiday	Authorised	27 Jan 2021

The form will then expand to show the details relating to the creation of the form.

Note: The blue writing for the form description is hyperlinked to the form itself. Clicking on this blue writing will open the completed form on screen.

Click on the coloured button (it will either be orange/green) an additional window will open to show the details of the person that the form is either sitting with to be authorised or who has authorised the form.

Employee Search

Clear search Search

Showing 30 results

Description	Event	Status	Raised Date
0011237 - MS EMMA HUGHES - postage test	Expense Claims	Open	1 Mar 2021
Holiday Request MS EMMA HUGHES (19/02/2021 - 26/02/2021)	Holiday	Authorised	27 Jan 2021

Holiday

Employee: EMMA HUGHES
Form Number: 0000845770
Submitted By: EMMA HUGHES
Submitted On: 27 Jan 2021

Description: Annual Leave
Start Date: 19/02/2021
Start Time: 08:30
End Date: 26/02/2021
End Time: 16:54
Amount of Leave: 6.0 Day(s)

Authorisation Progress

100% (Green circle highlighted)

0011237 - MS EMMA HUGHES - TEST please ignore and decline	Expense Claims	Open	18 Jan 2021
Absence Request MS EMMA HUGHES (08/01/2021 - 09/01/2021)	Absence	Authorised	5 Jan 2021

The screenshot shows a web application interface with a sidebar on the left containing navigation options like 'Personal Details', 'Other Absence', 'Holidays', 'Expenses', etc. The main content area displays a table of claims with columns for Description, Event, Status, and Raised Date. A specific claim is expanded to show details: Employee: EMMA HUGHES, Form Number: 000025554, Submitted By: EMMA HUGHES, Submitted On: 3 Mar 2021. Below this, an 'Authorization Progress' section shows a circular progress indicator with a red circle around the current step.

The pop-up window is titled 'Available Authorisers' and is under the 'Irregular Claims' section. It lists two potential authorisers:

- SARAH JONES**
Waste Operations Manager
(018356)
- DARIA POLOWSKA**
Environmental Supervisors (Waste Operations) (002818)

A 'Close' button is located at the bottom right of the window.

Click the **Close** button to close this window.

Should you require any further assistance please email us with your employee number and a short description.