

MyView Dashboard Guidance

Form History User Guide

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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' module in the MyView system. On the left is a navigation menu with options like Dashboard, Personal Details, Other Absence, Holidays, Expenses, Irregular Claims, Authorisations, Delegation & Responsibility, Historic Pay Documents, Sickness, Training Profile, Web Timesheets, Jobs & Careers, and Form History (which is highlighted). The main area is titled 'Form History' and contains search filters: 'Keyword Search' (a text box), 'Date From' and 'Date To' (date pickers), 'Event Filter' (a list of categories like Absence, Employee Photo, Expense Claims, Holiday, etc.), and 'Status Filter' (a dropdown menu with options like Authorised, Open, Withdrawn). Below the filters are 'Clear search' and 'Search' buttons. The results section shows 'Results per page: 20' and 'Showing 30 results'. A table displays the form history with columns: Description, Event, Status, and Raised Date. The first row shows a form for '0011237 - MS EMMA HUGHES - postage test' with Event 'Expense Claims', Status 'Open', and Raised Date '1 Mar 2021'. The second row shows a form for 'Holiday Bankweek: MS EMMA HUGHES (19/02/2021 - 26/02/2021)' with Event 'Holiday', Status 'Authorised', and Raised Date '27 Jan 2021'.

Description	Event	Status	Raised Date
0011237 - MS EMMA HUGHES - postage test	Expense Claims	Open	1 Mar 2021
Holiday Bankweek: 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 with a search bar containing 'holiday'. 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 highlighted with a red circle. Below the search bar, there is a table with columns: Description, Event, Status, and Raised Date. The table shows two results: '0011237 - MS EMMA HUGHES - postage test' and 'Holiday Request MS EMMA HUGHES (19/02/2021 - 26/02/2021)'.

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/actioned 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 with the 'Date From' field set to '01/01/2021'. 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 highlighted with a red circle. Below the search bar, there is a table with columns: Description, Event, Status, and Raised Date. The table shows two results: '0011237 - MS EMMA HUGHES - postage test' and 'Holiday Request MS EMMA HUGHES (19/02/2021 - 26/02/2021)'.

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**

The screenshot shows the 'Employee Search' interface. At the top, there are fields for 'Keyword Search' (containing 'holiday'), 'Date From' (01/01/2021), and 'Date To' (dd/mm/yyyy). Below these are two filter sections: 'Event Filter' and 'Status Filter'. The 'Event Filter' has a dropdown menu open, showing a list of categories with checkboxes: Absence, Employee Photo, Expense Claims, Holiday, Holiday Cancellations, Holiday Entitlement Requests, Next of Kin, Personal Details, Relationship Details, and Sickness. The 'Status Filter' has buttons for 'Authorised', 'Open', and 'Withdrawn'. A 'Search' button is visible. Below the filters, a table of results is shown with columns: Description, Status, and Raised Date. The table lists several records for 'MS EMMA HUGHES', including 'Expense Claims', 'Holiday', and 'Absence'.

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.**

This screenshot is a closer view of the 'Status Filter' section. It shows buttons for 'Authorised', 'Open', and 'Withdrawn'. A dropdown arrow to the right of these buttons is circled in red. The dropdown menu is open, showing a list of status options with checkboxes: 'Authorised', 'Open', and 'Withdrawn'. A 'Search' button is visible below the dropdown. The bottom of the screen shows 'Showing 30 results' and a pagination bar with '1' selected.

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.

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

Clear search Search

Showing 30 results

Results per page: 20

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.

Form Details

0011237 - MS EMMA HUGHES - TEST please ignore and decline

Expense Claims

Status: Open

Raised Date: 18 Jan 2021

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)

Authorization Progress: @

The screenshot shows a web application interface for managing employee claims. On the left is a navigation menu with categories like Personal Details, Other Absence, Holidays, Expenses, Irregular Claims, Authorisations, Delegation & Responsibility, Historic Pay Documents, Sickness, Training Profile, Web Timesheets, and Jobs & Careers. The 'Form History' section is currently selected. The main area displays a table of claims for 'MS EMMA HUGHES'. The table has columns for Description, Event, Status, and Raised Date. One claim, '0011237 - MS EMMA HUGHES - TEST please ignore and decline', is highlighted with a red circle around its 'Submitted' status. Below the table, there is a detailed view of the selected claim, showing the employee's name, form number, submission date, and a progress bar. The progress bar has three stages: 'Submitted' (highlighted with a red circle), 'Authorised', and 'Open'. Other claims listed include 'Expense Claims', 'Holiday Request', 'Absence Request', and 'Next of Kin Details'.

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
0011237 - MS EMMA HUGHES - TEST please ignore and decline	Expense Claims	Submitted	18 Jan 2021
Expense Claims Employee: EMMA HUGHES Form Number: 0000225554 Submitted By: EMMA HUGHES Submitted On: 3 Mar 2021 Claim Description: TEST please ignore and decline Claim Total Value: 0.01			
Authorisation Progress [Submitted] → [Authorised] → [Open]			
Absence Request MS EMMA HUGHES (08/01/2021 - 08/01/2021)	Absence	Authorised	5 Jan 2021
Holiday Request MS EMMA HUGHES (07/01/2021 - 07/01/2021)	Holiday	Authorised	5 Jan 2021
Employee: MS EMMA HUGHES - Next of Kin Details	Next of Kin	Authorised	24 Nov 2020
Employee: MS EMMA HUGHES - Next of Kin	Relationship Details	Open	24 Nov 2020

The 'Available Authorisers' window is a modal dialog box titled 'Available Authorisers'. It contains a section for 'Irregular Claims' with two authoriser cards. The first card is for SARAH JONES, Waste Operations Manager (018356). The second card is for 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.