



# OM WORKFLOW REPORTS



JOB AID WF-10

## TRANSACTION ZOM0178 AND ZOMWFMON

The purpose of this job aid is to explain how to run two OM workflow report transactions to locate an OM PCR, **ZOM0178** and **ZOMWFMON**. Additionally, this Job Aid describes how to set variants and the Workflow Approval level codes.

**ZOM0178** uses the position number (among other optional search criteria) to locate OM workflow.

**ZOMWFMON** uses the PCR ID (among other optional search criteria) to locate OM workflow.

**NOTE:** **ZOM0178** and **ZOMWFMON** transactions will return results only if the user has the appropriate security roles to view the agency/section/division.

### ZOM0178 OM Workflow Report Search Options

**OM Workflow Report**

Selection

Position ID

Additional data

|                       |                      |    |                      |  |
|-----------------------|----------------------|----|----------------------|--|
| Action                | <input type="text"/> | to | <input type="text"/> |  |
| Personnel area        | <input type="text"/> | to | <input type="text"/> |  |
| PCR ID                | <input type="text"/> | to | <input type="text"/> |  |
| PCR WF Approval Level | <input type="text"/> | to | <input type="text"/> |  |

Output options

ALV Layout variant

### ZOM0178 Data Search Options

OM Workflow can be searched by:

- Position ID
- Action
  - Refer to the [OM Position Actions Job Aid](#) located on the OSC website for a list of available options for this field.
- Personnel area
  - Only those for which the user has security access
- PCR ID (if known)
- PCR WF Approval Level
  - Use the drop-down menu to select the workflow approval levels.

**Executing the workflow report**

1. Determine the search criteria data needed for your report.
2. Enter the Position ID OR enter a range of Actions, Personnel Areas, PCR IDs, or WF Approval levels 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 Position 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 As | 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 Super  | 11/18/2009     | 11/19/2009     | 51        | 103    | 01  | 20 | 10       | 60         | 11/19/2009 | 14:11:11   | N       | FA1   |    |

**ZOMWFMON OM Workflow Process Monitoring Search Options**

**OM WF Process Monitoring**



Select

PCR ID  

Or

WF Processors  

Action  to  

Date Range  to  

**ZOMWFMON Data Search Options**

OM Workflow can be searched by:

- PCR ID
- WF Processors
- Action
  - Refer to the [OM Position Actions Job Aid](#) located on the OSC website for a list of available options for this field.
- Date Range

**Executing the workflow report**

1. Enter transaction code **ZOMWFMON** in the Command field; then click .
2. Enter the particular PCR(s) with the PCR ID's OR choose an Action Type and a date range OR by the WF Processors personnel number and a date range.

**Note:** The WF Processor may be an Initiator, Funding Approver, Division Approver, Agency Approver, or BEST OM Approver

3. Click  (Execute) to perform the search.
4. Information retrieved will include:

- |            |                     |
|------------|---------------------|
| • PCR ID   | • Create Date       |
| • Agency   | • Create Time       |
| • Org Unit | • WF Status         |
| • Position | • WF Approver Level |

- Action
- Number of times rejected
- Initiator
- Funding Approver with number of days held
- Division Approver with number of days held
- Agency Approver with number of days held
- BEST OM Approver with number of days held

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

- Action **103** (Reallocate Position Up Action)
- PCR Approval Level: **CREJ** (Complete – Rejected)

**OM WF Process Monitoring**

| PCR ID     | Agcy | Org.Unit | Position | Create Date | Cr Time  | WF Status    | WF Approver Level          | Action                       | Rejects | Initiator | Funding Approver | Date In    | Date Out   | Num Days |
|------------|------|----------|----------|-------------|----------|--------------|----------------------------|------------------------------|---------|-----------|------------------|------------|------------|----------|
| 5000130321 | 0901 | 20001295 | 60011113 | 03/09/2017  | 15:27:51 | C - Canceled | CREJ - Complete - Rejected | 103 - Reallocate Position... | 1       |           |                  | 03/09/2017 | 03/09/2017 | 0        |

### Icons/Fields in Report Search Options



**Multiple Selection icon**

In the Selection and the Additional Data sections, searches can be performed using multiple selection criteria to broaden your output.



**Data Range fields**

In the Additional Data section, searches can be performed using individual data or even a range of data.

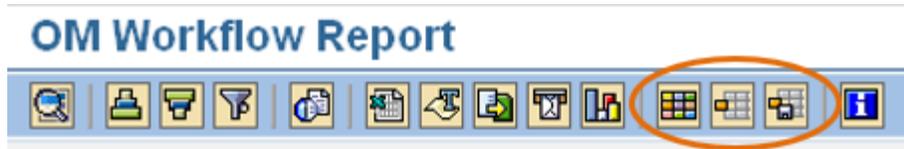


**Variant List field**

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

### Managing the Layout View of a Report

After an OM Workflow Report is run, the following toolbar with buttons will appear:



Layout Management Options:

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

### Changing and Saving the Layout of a Report

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

There are five tab options on the Change Layout box.

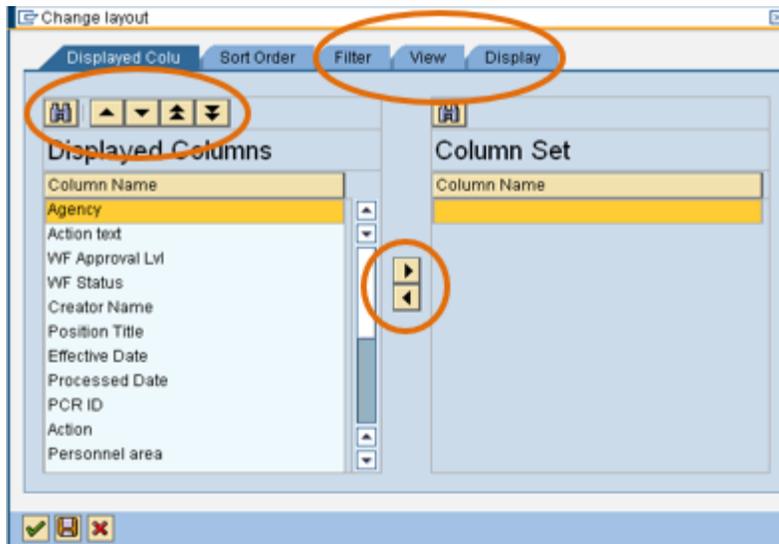
- **Displayed Columns tab**– Displays the fields included on the current report. If a different layout is desired, the display can be adjusted by moving the columns to the right column to “hide” them from the display.

-  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

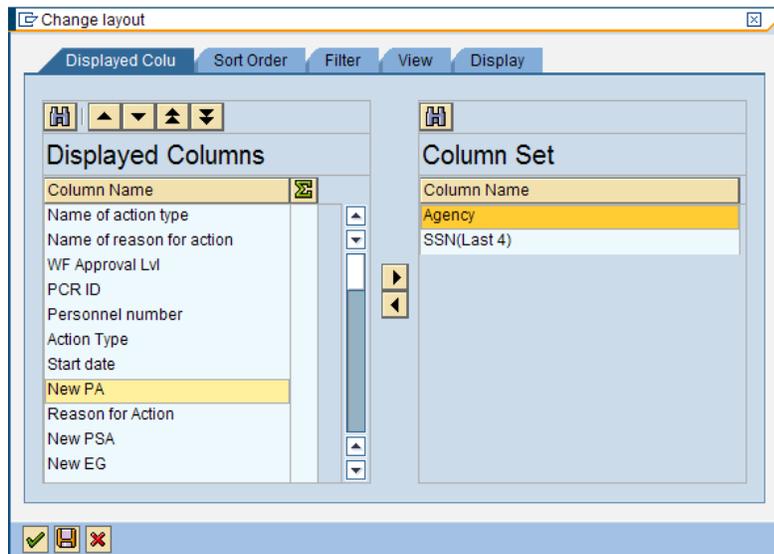
- **Sort Order tab** – Displays the currently sorted fields on the left and the set of available fields on the right. (also available under the **Sort** buttons .

-  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



2. Select the columns to appear 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.



3. Once the unneeded columns are selected, click on the green check mark at the bottom left of the pop-up box. The report redisplay with only the column set 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      | 12/04/200 |
| Reallocate Position Up | Funding Approval | In Process | Accounting Clerk IV                   | 01/01/2009     | 103  |            | N         | FA1      | 01/11/200 |
| Reallocate Position Up | Funding Approval | In Process | Health Care Technician I              | 01/11/2009     | 103  |            | N         | FA1      | 01/11/200 |
| Reallocate Position Up | Funding Approval | In Process | Foreign Language Inter II             | 10/01/2008     | 103  |            | N         | FA1      | 10/08/200 |
| Reallocate Position Up | Funding Approval | In Process | Probation/parole Officer I            | 12/01/2008     | 103  |            | N         | FA1      | 01/09/20  |
| Reallocate Position Up | Funding Approval | In Process | Probation/parole Officer I            | 11/25/2008     | 103  |            | N         | FA1      | 01/09/200 |
| Reallocate Position Up | Funding Approval | In Process | Probation/parole Officer I            | 11/25/2008     | 103  |            | N         | FA1      | 01/09/200 |
| Reallocate Position Up | Funding Approval | In Process | Probation/parole Surveillance Officer | 11/20/2008     | 103  |            | N         | FA1      | 01/09/20  |

4. The order of the columns can be rearranged. Position the mouse over the top of the column to be moved until the cursor changes to a dark down arrow. Single-click to highlight that column. In the following example the Act. Column is highlighted.
5. Position the cursor over the title of the column and drag it to the new location. A red line will indicate where the column is to be moved. Release the mouse and the column will move to that position.

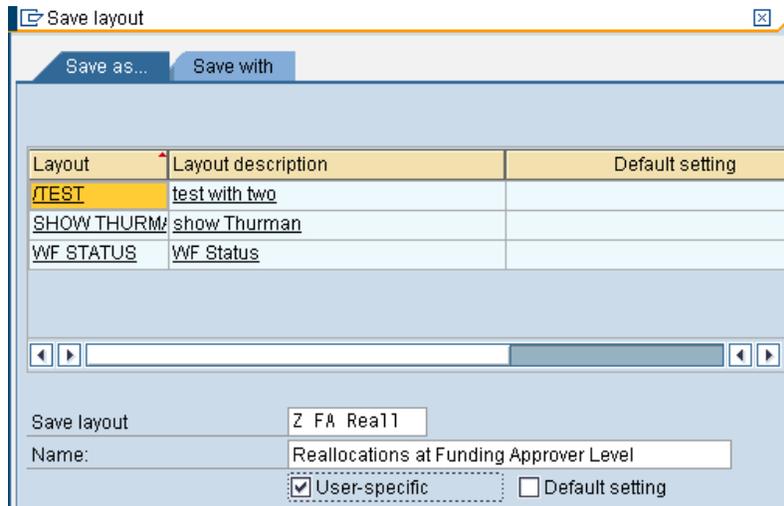
| Position ... | Position Title                        | Act. | Action text            | WF Status | WF Status  | WF Level | WF Approval Lvl  | Effective Date | PCR Char   |
|--------------|---------------------------------------|------|------------------------|-----------|------------|----------|------------------|----------------|------------|
| 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 |

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

7. Enter a short description in the **Save layout** field to identify the layout design.
8. Enter a more descriptive name for the layout in the **Name** field.
9. Check the **User-specific** checkbox for this layout design to be restricted to only the current user’s ID.

**NOTE:** If you want this layout to be user-specific (i.e., only the current user can access), begin the 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.

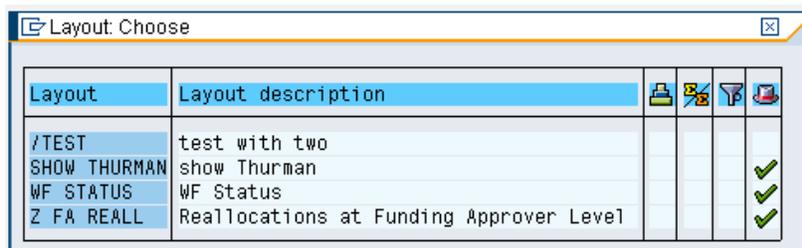
10. When all fields have been completed on the Save layout box, click the green check mark  in the lower left-hand corner of the box to save the layout design.



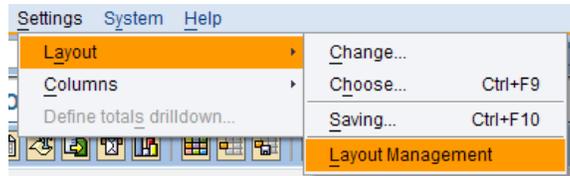
An ALV Variant layout has now been created.

### 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 desired and click Execute to run the report. The report will display with the applied variant layout.
  - If the variant is not selected prior to executing the report, the user can still apply it once they 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 desired. The layout is then applied.
  - To change the current view to another view, use the **Select layout** icon to apply that view in the current report.
  - Set the default layout view by accessing the following menu path: *Settings > Layout > Layout Management*



- Select the default setting desired each time the report is run. This can be done by clicking in the **Default setting** field next to the layout desired.

### Layout: Management

The 'Layout: Management' window displays a toolbar with icons for save, delete, add, print, and filter. Below the toolbar is a table titled 'User layout' with three columns: 'Layout', 'Default setting', and 'Layout description'.

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

## Workflow 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   |
| 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            |