

SDD Responsible - Guide – Setting up filters in Staff Development Dialogue overview

To get the simplest overview of employees' Staff Development Dialogue documents, it is recommended you set up the filter on the overview in the following way:

<p>Access the “Staff Development Dialogue overview”, where the following filter is:</p>	<p>Saved Search</p> <p>ManagerViewFacetedSe <input type="button" value="Save"/></p> <hr/> <p>Filters Reset </p> <p>Expand All Collapse All</p> <hr/> <p>^ Employees Clear</p> <p>All Evaluatees Directs Only</p> <hr/> <p>^ Document Type Clear</p> <p><input checked="" type="checkbox"/> Standard <input type="checkbox"/> Anytime</p> <hr/> <p>^ Tasks</p> <p><input type="checkbox"/> Assigned to me </p> <hr/> <p>^ Assignment Type Clear</p> <p><input type="checkbox"/> Nonprimary <input checked="" type="checkbox"/> Primary</p> <hr/> <p>^ Assignment Status Clear</p> <p><input checked="" type="checkbox"/> Active <input type="checkbox"/> Inactive <input type="checkbox"/> Suspended</p> <hr/> <p>^ Document Status Clear</p> <p>In progress Completed Canceled</p>
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Click the cogwheel to access filter settings.

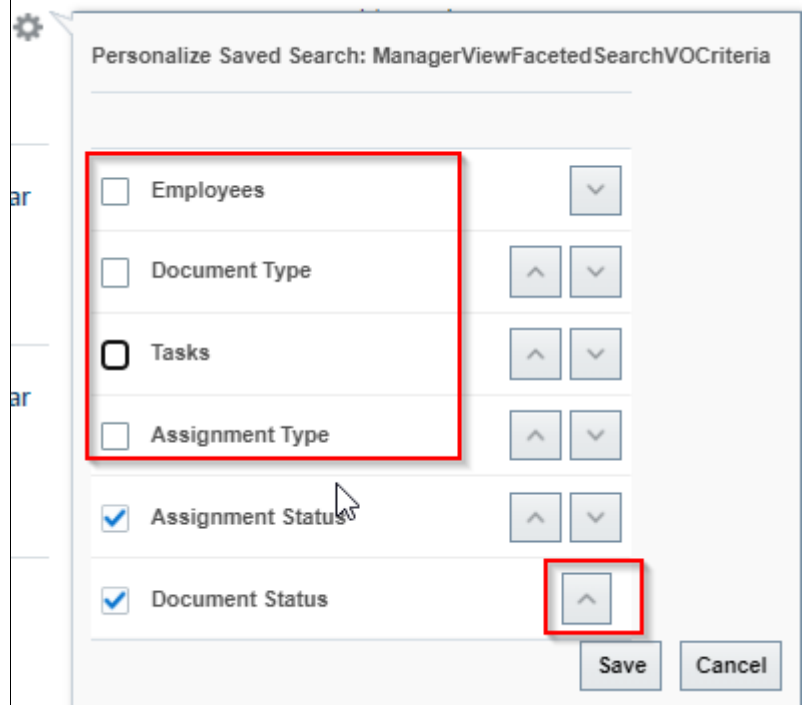
Saved Search

ManagerViewFacetedSe

Filters 

Unclick displayed filters and move up "Document Status".

Finish with "Save"



Personalize Saved Search: ManagerViewFacetedSearchVOCriteria

- Employees
- Document Type
- Tasks
- Assignment Type
- Assignment Status
- Document Status

Save this setup as default by clicking "Save" under *Saved Search*.

Saved Search

ManagerViewFacetedSe

Filters

|

^ Document Status

In progress

Completed

Canceled

^ Assignment Status

Active

Inactive

Suspended

Name the search.
Select it as default.
Finish with "OK".

Create Saved Search

* Name

Default