

Workflow Filters

Workflow Filters are used to set-up conditions under which Workflow is executed. One of the methods to filter objects, which need to fulfill specified conditions to be part of Workflow scenario is to match with Workflow filter. Workflow filter is pre-set view on Events or Tasks, Time Sheet records, Projects, Folders (Clients), Activities, Contacts or User database.

You may condition the Workflow to be executed only in connection with specific Type of Project in particular Phase, for example. No matter whether Task, Activity or Message will be created, this Workflow Filter will make sure that the Project will meet the condition.

Workflow Filters are (similar to Workflow Actions) stored in context of module & module dimension.

Once you save Workflow Filter, it may be **used as additional filtering criteria** when defining the core filtering criteria for Workflow.

View Settings

New View Setting is used primarily to create new online view filter. This filter may be used to restrict objects that will act in workflow.

Once you selected module & area, which you would like to create view for (for example Project > Project will enable you to filter for basic Projects fields), you will get all available fields to be **filtered**. Add one or more criteria into the **Filter** grid. You may use several **Operators**, such as =, does not include, begins with, starts at, ... **based on type of the field** filtered. Enter **Value** that you would like to filter for.

