



# Checking the Status of a Form

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Completed Tasks & Action History

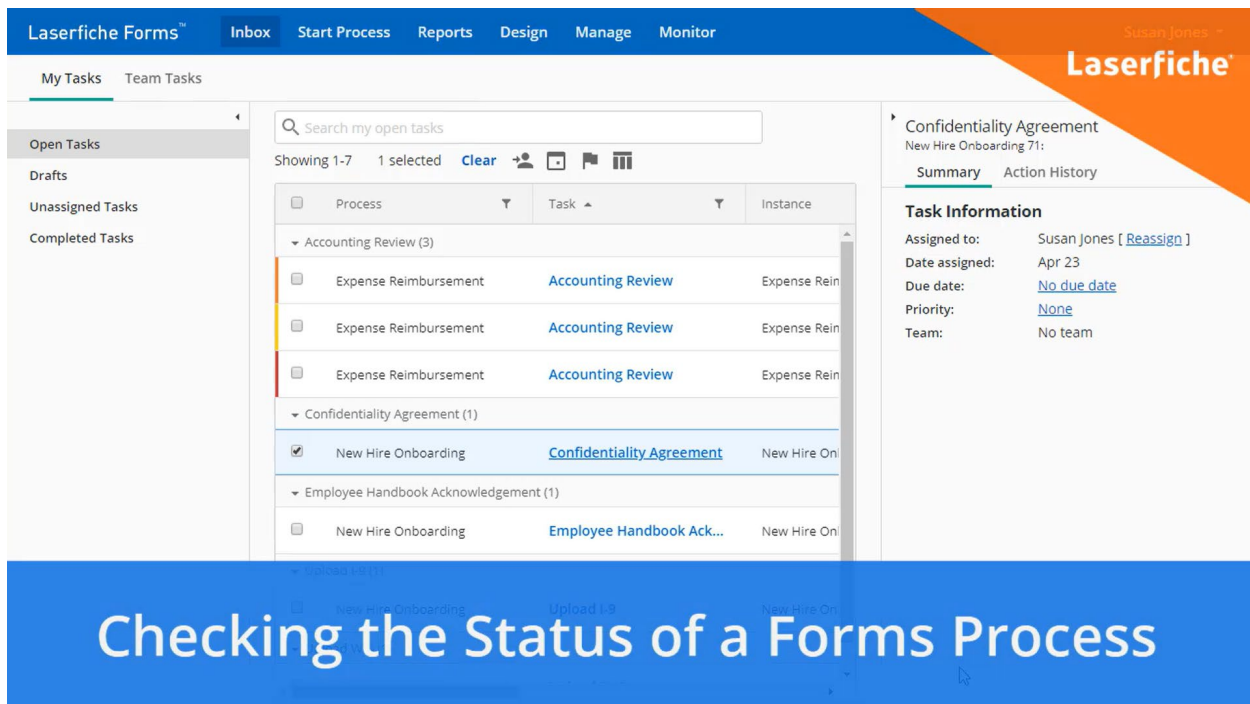
**Laserfiche®**



**Lakehead**  
UNIVERSITY

Human  
Resources

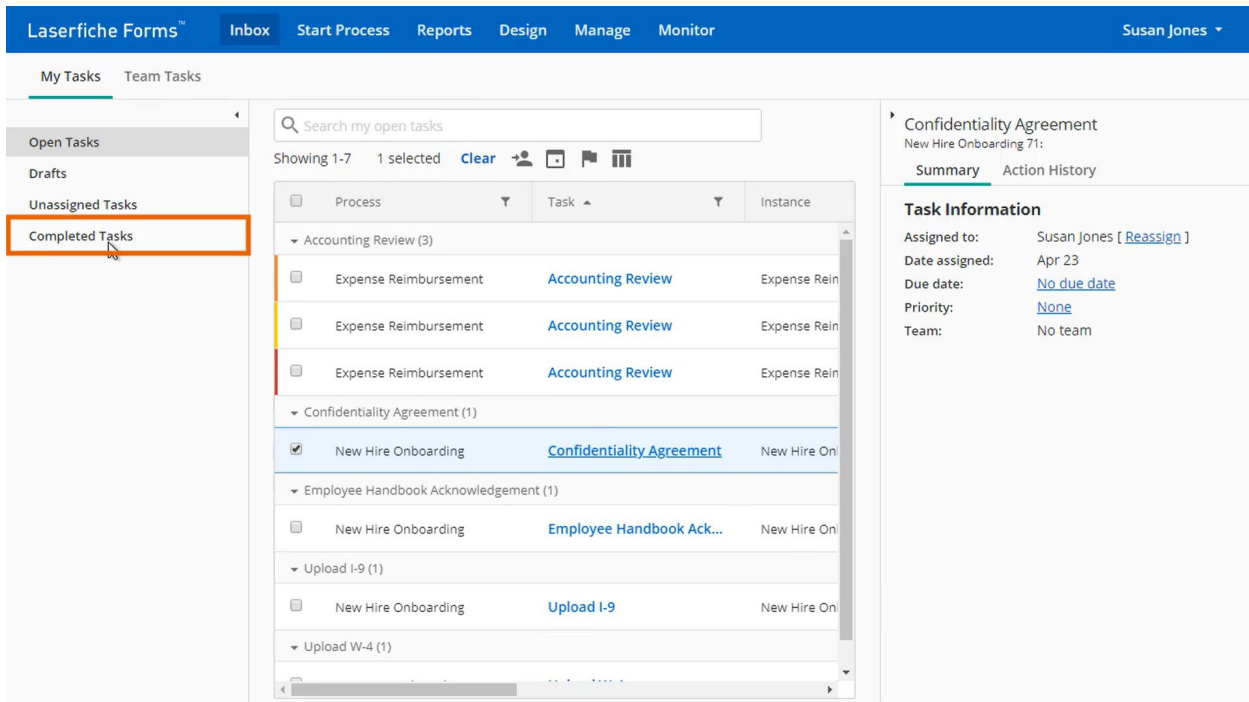
Laserfiche offers an easy way to check on the status of processes you've been involved in. Additionally, administrators in Human Resources can review the progress of any forms process.



The screenshot displays the Laserfiche Forms web application interface. At the top, a navigation bar includes 'Inbox', 'Start Process', 'Reports', 'Design', 'Manage', and 'Monitor'. A user profile for 'Susan Jones' is visible in the top right corner. On the left, a sidebar lists task categories: 'My Tasks', 'Team Tasks', 'Open Tasks', 'Drafts', 'Unassigned Tasks', and 'Completed Tasks'. The main area features a search bar and a table of tasks. The table has columns for 'Process', 'Task', and 'Instance'. It shows a list of tasks under 'Accounting Review (3)', 'Confidentiality Agreement (1)', and 'Employee Handbook Acknowledgement (1)'. The 'New Hire Onboarding' task under 'Confidentiality Agreement' is selected. On the right, a 'Task Information' panel provides details for the selected task, including 'Assigned to: Susan Jones', 'Date assigned: Apr 23', 'Due date: No due date', 'Priority: None', and 'Team: No team'.

**Checking the Status of a Forms Process**

When you submit a form or complete a task, you are completing one step in a larger process. To see the status of that process click “Completed Tasks” under “My Tasks” in your inbox.



The screenshot shows the Laserfiche Forms interface. The top navigation bar includes 'Laserfiche Forms™', 'Inbox', 'Start Process', 'Reports', 'Design', 'Manage', 'Monitor', and a user profile 'Susan Jones'. Below this, there are tabs for 'My Tasks' and 'Team Tasks'. On the left sidebar, under 'My Tasks', the 'Completed Tasks' option is highlighted with an orange box. The main content area displays a list of completed tasks. At the top, there is a search bar 'Search my open tasks' and a status bar 'Showing 1-7 1 selected Clear'. The task list has columns for 'Process', 'Task', and 'Instance'. The tasks are grouped by process: 'Accounting Review (3)', 'Confidentiality Agreement (1)', 'Employee Handbook Acknowledgement (1)', 'Upload I-9 (1)', and 'Upload W-4 (1)'. The 'Confidentiality Agreement' task is selected, and its details are shown on the right. The details include 'Task Information' such as 'Assigned to: Susan Jones [ Reassign ]', 'Date assigned: Apr 23', 'Due date: No due date', 'Priority: None', and 'Team: No team'.

Process	Task	Instance
Accounting Review (3)		
Expense Reimbursement	Accounting Review	Expense Rein
Expense Reimbursement	Accounting Review	Expense Rein
Expense Reimbursement	Accounting Review	Expense Rein
Confidentiality Agreement (1)		
New Hire Onboarding	Confidentiality Agreement	New Hire On
Employee Handbook Acknowledgement (1)		
New Hire Onboarding	Employee Handbook Ack...	New Hire On
Upload I-9 (1)		
New Hire Onboarding	Upload I-9	New Hire On
Upload W-4 (1)		

You can search, filter, and sort this list to find specific process instances. An instance is the specific execution of a step in the process, for example, submitting or approving a form. If you were assigned more than one task in the process, you will see more than one instance for that specific form in the “Completed Tasks”.



## Search

Laserfiche Forms™ | Inbox | Start Process | Reports | Design | Manage | Monitor | Susan Jones ▾

My Tasks | Team Tasks

Open Tasks  
Drafts  
Unassigned Tasks  
Completed Tasks

Search tasks completed by me

Showing 1-6

Process	Task	Instance
▼ Last Month (5)		
New Hire Onboarding	Direct Deposit Form	New
New Hire Onboarding	Start Employee Onboarding	New
Expense Reimbursement	Expense Reimbursement Request Sub...	Exper
Building Maintenance Request	Building Maintenance Request Submiss...	Build
Job Application	Applicant Submission	Job A
▼ Before last month (1)		
Building Maintenance Request	Maintenance Request Approval by Facil...	Build

Select a task to see its details here.

## Filter

Laserfiche Forms™ | Inbox | Start Process | Reports | Design | Manage | Monitor | Susan Jones ▾

My Tasks | Team Tasks

Open Tasks  
Drafts  
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Showing 1-6

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Building Maintenance Request	Building Maintenance Request Submiss...	Build
Job Application	Applicant Submission	Job A
▼ Before last month (1)		
Building Maintenance Request	Maintenance Request Approval by Facil...	Build

Select a task to see its details here.

## Sort

Laserfiche Forms™ | Inbox | Start Process | Reports | Design | Manage | Monitor | Susan Jones ▾

My Tasks | Team Tasks

Open Tasks  
Drafts  
Unassigned Tasks  
Completed Tasks

Search tasks completed by me

Showing 1-6

Process	Task	Instance
▼ Building Maintenance Request (2)		
Building Maintenance Request	Building Maintenance Request Submiss...	Build
Building Maintenance Request	Maintenance Request Approval by Facil...	Build
▼ Expense Reimbursement (1)		
Expense Reimbursement	Expense Reimbursement Request Sub...	Exper
▼ Job Application (1)		
Job Application	Applicant Submission	Job A
▼ New Hire Onboarding (2)		
New Hire Onboarding	Direct Deposit Form	New
New Hire Onboarding	Start Employee Onboarding	New

Select a task to see its details here.

Clicking on a task lets you see more details about the process.

Laserfiche Forms™ | [Inbox](#) | [Start Process](#) | [Reports](#) | [Design](#) | [Manage](#) | [Monitor](#) | Susan Jones ▾

My Tasks | Team Tasks

Open Tasks  
Drafts  
Unassigned Tasks  
Completed Tasks

Search tasks completed by me

Showing 1-6

Process	Task	Instance
▼ Building Maintenance Request (2)		
Building Maintenance Request	<a href="#">Building Maintenance Request Submiss...</a>	Build
Building Maintenance Request	<a href="#">Maintenance Request Approval by Facil...</a>	Build
▼ Expense Reimbursement (1)		
Expense Reimbursement	<a href="#">Expense Reimbursement Request Sub...</a>	Exper
▼ Job Application (1)		
Job Application	<a href="#">Applicant Submission</a>	Job A
▼ New Hire Onboarding (2)		
New Hire Onboarding	<a href="#">Direct Deposit Form</a>	New
New Hire Onboarding	<a href="#">Start Employee Onboarding</a>	New

Maintenance Request Approval by Facilitie...  
Building Maintenance Request 26:

Summary | Action History

**Task Information**

Completed by: Susan Jones  
Date completed: Mar 27  
Due date: February 28, 2018 5:00 PM  
Priority: Medium  
Team: Human Resources

The summary tab shows you key information about the process.

Laserfiche Forms™ | [Inbox](#) | [Start Process](#) | [Reports](#) | [Design](#) | [Manage](#) | [Monitor](#) | Susan Jones ▾

My Tasks | Team Tasks

Open Tasks  
Drafts  
Unassigned Tasks  
Completed Tasks

Search tasks completed by me

Showing 1-6

Process	Task	Instance
▼ Building Maintenance Request (2)		
Building Maintenance Request	<a href="#">Building Maintenance Request Submiss...</a>	Build
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▼ Expense Reimbursement (1)		
Expense Reimbursement	<a href="#">Expense Reimbursement Request Sub...</a>	Exper
▼ Job Application (1)		
Job Application	<a href="#">Applicant Submission</a>	Job A
▼ New Hire Onboarding (2)		
New Hire Onboarding	<a href="#">Direct Deposit Form</a>	New
New Hire Onboarding	<a href="#">Start Employee Onboarding</a>	New

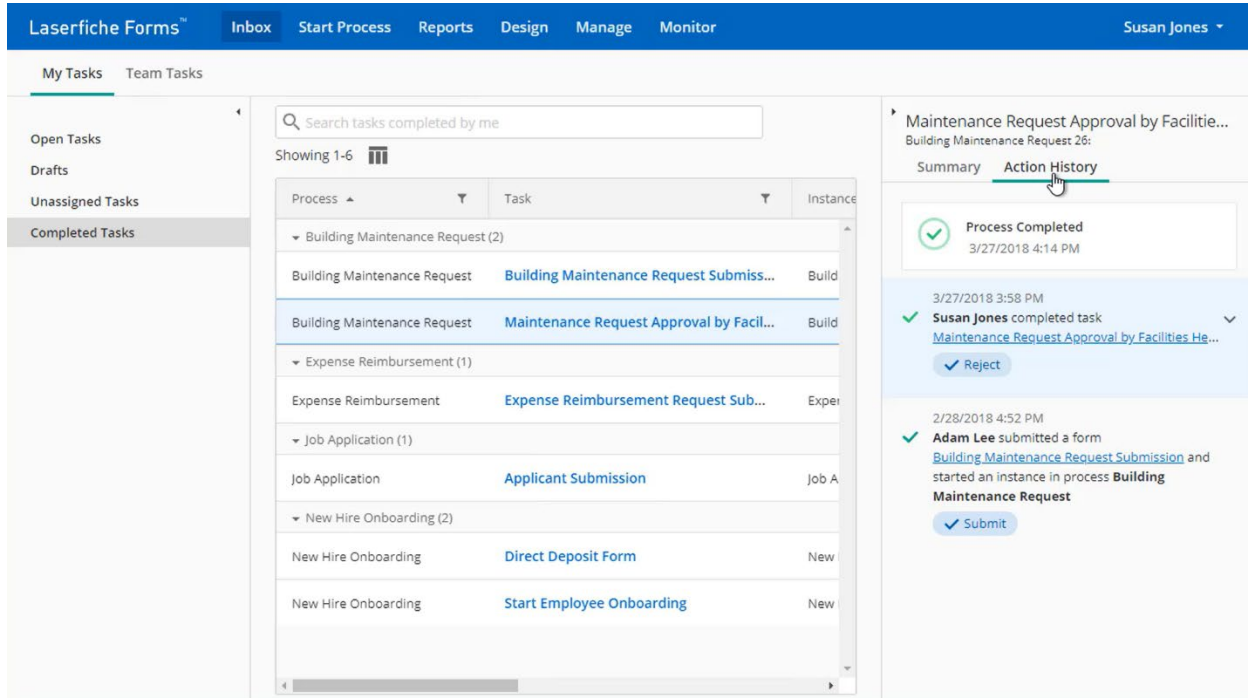
Maintenance Request Approval by Facilitie...  
Building Maintenance Request 26:

**Summary** | Action History

**Task Information**

Completed by: Susan Jones  
Date completed: Mar 27  
Due date: February 28, 2018 5:00 PM  
Priority: Medium  
Team: Human Resources

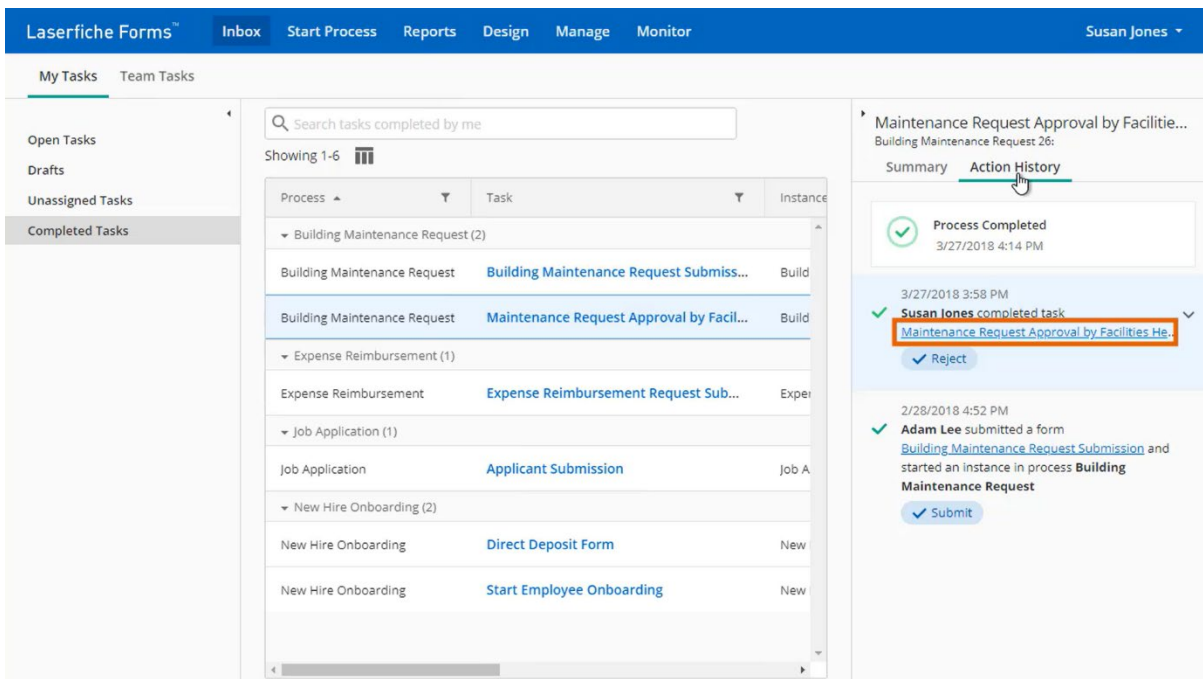
The action history tab shows you what has happened in the process up to this point.



The screenshot shows the Laserfiche Forms interface. The top navigation bar includes 'Inbox', 'Start Process', 'Reports', 'Design', 'Manage', and 'Monitor'. The user 'Susan Jones' is logged in. The left sidebar shows 'My Tasks' and 'Team Tasks' with sub-items: 'Open Tasks', 'Drafts', 'Unassigned Tasks', and 'Completed Tasks'. The main area displays a list of tasks under 'Showing 1-6'. The 'Action History' tab is selected for the 'Maintenance Request Approval by Facilities' process. The history shows a 'Process Completed' status on 3/27/2018 at 4:14 PM, followed by a task completion by Susan Jones on 3/27/2018 at 3:58 PM, and a task submission by Adam Lee on 2/28/2018 at 4:52 PM.

Process	Task	Instance
Building Maintenance Request (2)		
Building Maintenance Request	Building Maintenance Request Submiss...	Build
Building Maintenance Request	Maintenance Request Approval by Facil...	Build
Expense Reimbursement (1)		
Expense Reimbursement	Expense Reimbursement Request Sub...	Exper
Job Application (1)		
Job Application	Applicant Submission	Job A
New Hire Onboarding (2)		
New Hire Onboarding	Direct Deposit Form	New
New Hire Onboarding	Start Employee Onboarding	New

Click the link to see the form associated with that step in the process.



This screenshot is identical to the one above, but with a red rectangular box highlighting the link 'Maintenance Request Approval by Facilities He...' in the 'Action History' section, indicating where the user should click to view the form.

Click the down arrow to the right of a step to see more information about how the task was assigned.

Laserfiche Forms™ **Inbox** Start Process Reports Design Manage Monitor Susan Jones ▾

My Tasks Team Tasks

Open Tasks  
Drafts  
Unassigned Tasks  
Completed Tasks

Search tasks completed by me

Showing 1-6

Process	Task	Instance
▼ Building Maintenance Request (2)		
Building Maintenance Request	<a href="#">Building Maintenance Request Submiss...</a>	Build
Building Maintenance Request	<a href="#">Maintenance Request Approval by Facil...</a>	Build
▼ Expense Reimbursement (1)		
Expense Reimbursement	<a href="#">Expense Reimbursement Request Sub...</a>	Expe
▼ Job Application (1)		
Job Application	<a href="#">Applicant Submission</a>	Job A
▼ New Hire Onboarding (2)		
New Hire Onboarding	<a href="#">Direct Deposit Form</a>	New
New Hire Onboarding	<a href="#">Start Employee Onboarding</a>	New

Maintenance Request Approval by Facilitie...  
Building Maintenance Request 26:

Summary **Action History**

✓ Process Completed  
3/27/2018 4:14 PM

3/27/2018 3:58 PM  
✓ Susan Jones completed task  
[Maintenance Request Approval by Facilities ...](#)

✓ Reject

- Adam Lee reassigned the task to Susan Jones on February 28, 2018 5:00 PM  
*Hi Susan, I'm not familiar with this type of request. Can you take a look?*
- Adam Lee changed the task's due date to February 28, 2018 5:00 PM on February 28, 2018 4:54 PM
- Adam Lee assigned the task to Adam Lee on February 28, 2018 4:54 PM
- The task was assigned to Human Resources on February 28, 2018 4:52 PM. The due date is: February 22, 2018 5:00 PM. The priority is: Medium