

WORKFLOW TOOLS

WorkFlow Manager Browser View Quick Guide

November 2014

The WorkFlow Browser displays the current workflows saved within the system, including the current user's active tasks, assignments, and progress. You can create new workflows and create workflow folders.

The WorkFlow Browser view contains the following components:

WorkFlow Browser 1

WorkFlow Browser Primary | Supplemental 2

Drag a column here to group by.

	Tax Type	Year	Period	Entity Name	Entity Number	Jurisdiction	W/F Template	Description
	CORPORATE	2014	12/31	APEX Parent	324	FEDERAL	Parallel with chec...	
	INCOME TAX	2014	12/31	ABC Corp	12345678	FEDERAL	Serial with checklist	
	STATE INCOME	2014	3/31	ABC Corp	12345678	CALIFORNIA	CA State Income ...	2014 California ..
	ANNUAL REPORT	2014	12/31	FM Enterprises 1	3330	ALABAMA	1120	
	CORPORATE	2014	11/30	FM Nov 3	1104	CALIFORNIA	1120	
	FEDERAL INCOME	2014	12/31	ABC Corp	12345678	FEDERAL	Rule with Checklist	Preparing/filing t.
	FEDERAL INCOME	2014	12/31	FM Associates, Inc	3331	FEDERAL	1120	
	ANNUAL REPORT	2014	6/30	FM Printing & Design, Inc.	3398	ARKANSAS	1120	
	STATE INCOME	2013	12/31	Haden Manufacturing, I...	342	NEW YORK	LB State Return P...	
	ANNUAL REPORT	2013	12/31	FM2, Inc.	3331	AL	route backwards	
	ANNUAL REPORT	2013	7/31	FM Partners	3339	BELGIUM	Arrange a Meeting	
	ANNUAL REPORT	2013	3/31	FMA Engineering 24	3338	ARIZONA	Arrange a Meeting	
	UNASSIGNED	2013	4/30	ABC Holdings 9	20008	ARKANSAS	United Kingdom ...	
	ANNUAL REPORT	2013	2/28	AAA-Updated	1	Federal	1120	
	COMPANY SECRETARY	2013	12/31	FM Printing & Design, Inc.	3398	AUSTRALIA	Arrange a Meeting	
	CORPORATE	2013	9/30	Samson Inc.	2345	ALABAMA LOCAL	SamWFStandard	Sample workflow
	FEDERAL INCOME	2013	12/31	Acme Sidings	002	ALASKA	Federal and/or St...	
	FEDERAL INCOME	2013	12/31	Haden Manufacturing, I...	342	FEDERAL	LB Federal Return...	
	CORPORATE TAX	2013	12/31	FM Associates, Inc	3331	ALASKA	1120	sample creation
	CORPORATE TAX	2013	12/31	Acme Sidings	002	AUSTRALIA	AU Consolidated ...	

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- 2 Browser grid
- 3 Page navigation icons

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LEARNING ABOUT THE LEFT NAVIGATION PANE

The left navigation pane is common to all WorkFlow Tools applications, and includes the following items:

- Heading that shows the name of the selected application
- Search criteria fields
- Links to other WorkFlow Tools modules and applications.

The screenshot shows the WorkFlow Browser interface. It features a search section with filters for FOLDER (Tax Type, Year, Period), WORKFLOW (W/F Template, Entity Name, Entity Number, Jurisdiction, WorkFlow Type), and GROUP CODE (Group Code). Below the search section is a list of navigation links. Callouts provide additional context for these elements.

Callouts:

- Name of the selected module or application.** In this example, WorkFlow Browser is the selected application.
- Search criteria for primary or supplemental workflows.** In this example, the criteria shown is for primary workflows.
- Click the splitter to hide the left navigation pane and view the Browser grid only**
- Links to other WorkFlow Tools modules and applications**

WorkFlow Browser

FOLDER

Tax Type: ALL

Year: ALL

Period: ALL

WORKFLOW

W/F Template: ALL

Entity Name: [Search Icon]

Entity Number: [Search Icon]

Jurisdiction: [Search Icon]

WorkFlow Type: ALL

GROUP CODE

Group Code: ALL

Search Clear

Navigation Links:

- My Work
- Documents
- DataFlow
- Control Log
- Reports
- Calendar
- Entity Browser
- Calendar Setup
- Setup

ENTERING SEARCH CRITERIA

The left navigation pane for WorkFlow Browser includes multiple search fields that allow you to enter specific criteria and view the results on the Browser grid. You can search for your results in one of two ways:

- Type your search criteria into one or more fields, then click **Search**.
- Use the “Lookup” feature by clicking the  next to the **Entity Name**, **Entity Number**, or **Jurisdiction** fields.

USING THE “LOOKUP” FEATURE

To search for information using the fields with lookup icons, type any part of the word or number into the appropriate field, then click the . The **Search Lookup Results** dialog box appears.

For example, if you type **H** into the **Entity Name** field then click the **Lookup** icon, the **Search Lookup Results** dialog box appears and lists all entities that begin with H.

Search Lookup Results

SEARCH CRITERIA

Entity Name:

Entity ID:

Entity Type:

Entity Group:

Location:

Search

Clear

Entity Number	Entity Name
342	Haden Manufacturing, Inc.
7435	Haden Southwest Partnership
7435	HADEN SOUTHWEST PARTNERSHIP
3450	HT Associates

Ok

Cancel

Page 1 of 1 (4 items)

Select an entity from the list, then click **OK**. The **Search Lookup Results** dialog box closes, and the selected entity name and corresponding entity number appear in those search criteria fields, and the selected workflow appears in the Browser grid.

Workflow Browser

FOLDER

Tax Type ALL

Year ALL

Period ALL

WORKFLOW

W/F Template ALL

Entity Name Haden Manufacturing, Inc.

Entity Number 342

Jurisdiction

Workflow Type ALL

GROUP CODE

Group Code ALL

Search Clear

My Work

Documents

DataFlow

Control Log

Reports

Calendar

Entity Browser

Calendar Setup

Setup

Workflow Browser Primary | Supplemental

Drag a column here to group by.

	Tax Type	Year	Period	Entity Name	Entity Number	Jurisdiction	W/F Template	Description
	FEDERAL INCOME	2013	12/31	Haden Manufacturing, Inc.	342	FEDERAL	LB Federal Retur...	
	STATE INCOME	2013	12/31	Haden Manufacturing, Inc.	342	NEW YORK	LB State Return P...	

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TIPS:

- To narrow your search results, type your search criteria into more than one field.
- To broaden your search, select **ALL** from a field's drop-down menu, then click **Search**.
- To clear the search results and start over, click **Clear**.

PERFORMING WILD CARD SEARCHES

Suppose that you know part of an entity name or are unsure of its spelling. You can perform a wild card search by typing a portion of the name followed by an asterisk into the **Entity Name** field, then clicking **Search**. For example, if you type **ac***, all entities with names starting with **AC** will appear on the Browser grid.

Workflow Browser

FOLDER

Tax Type ALL

Year ALL

Period ALL

WORKFLOW

W/F Template ALL

Entity Name ac*

Entity Number

Jurisdiction

Workflow Type ALL

GROUP CODE

Group Code ALL

Search Clear

My Work

Documents

DataFlow

Control Log

Reports

Calendar

Entity Browser

Calendar Setup

Setup

Workflow Browser Primary | Supplemental

Drag a column here to group by.

	Tax Type	Year	Period	Entity Name	Entity Number	Jurisdiction	W/F Template	Description
	ANNUAL REPORT	2010	1/31	ACME New York, Inc.	303	CHILE	New Client Docu...	
	INTERNATIONAL IN...	2010	12/31	ACME Interamericana, S. A.	688	SOUTH AFRICA	Income Tax Ret...	
	FEDERAL INCOME	2011	1/31	Acme Inc. of Texas	W003200	federal	Buy Equipment	Testing
	FEDERAL INCOME	2011	1/31	ACME Trucking, Inc.	603	Federal	Buy Equipment	
	FEDERAL INCOME	2011	1/31	ACME Trucking, Inc.	603	CA	Buy Equipment	testing
	STATE INCOME	2011	1/31	ACME Trucking, Inc.	603	nj	Buy Equipment	
	INTERNATIONAL IN...	2009	12/31	ACME Trucking, Inc.	603	Fedearl	Federal and/or S...	
	FEDERAL INCOME	2011	6/30	ACME Interamericana, S. A.	688	CALIFORNIA	Test Workflow T...	test
	UNASSIGNED	2012	1/31	ACME Trucking, Inc.	603	ALASKA	Consolidation W...	Compute Tax
	CORPORATE	2012	1/31	ACME Financial Publications, Inc.	340	CALIFORNIA	Transfer Pricing	1
	CORPORATE	2012	1/31	ACME Holdings Europe	602	SOUTH AFRICA	Transfer Pricing	
	COMPANY SECRETARY	2012	12/31	Acme Bricks	001	FEDERAL	Compute Tax PR	
	CORPORATE TAX	2012	1/31	Acme Bricks	001	FEDERAL	Compute Tax PR	
	CORPORATE TAX	2012	12/31	Acme Sidings	002	FEDERAL	Compute Tax PR	
	CORPORATE TAX	2012	12/31	Acme Bricks	001	ALABAMA	Australia CT	
	CORPORATE	2012	12/31	Acme Bricks	001	AUSTRALIA	Australia CT Test...	
	CORPORATE	2012	12/31	Acme Bricks	001	AUSTRALIA	Belgium CT	
	INDIRECT TAX	2012	12/31	ACME Interamericana, S. A.	688	ALABAMA	Finland Indirect	Test with
	STATE INCOME	2012	12/31	ACME Interamericana, S. A.	688	Alabama	FM jul17 no short	41
	CORPORATE TAX	2012	12/31	ACME New York, Inc.	303	Alabama	Luxembourg CT	11

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HIDING THE LEFT NAVIGATION PANE

To expand the view of the Browser grid, you can hide the left navigation pane by clicking the splitter.

To make this change permanent, from the **Options** menu, select **My Preferences**. Then, select the **Hide Navigation Pane After Search** check box and click **Save**.

My Preferences - Display Properties

Display Properties

Non-Working Days

Email Notifications

☐ Hide Navigation Pane After Search

☒ Default Calendar to Events Criteria

☒ Default Calendar to Grid View

☒ Retain Last Viewed Module

Save

Cancel

LEARNING ABOUT THE BROWSER GRID

On the Browser grid, you can work with two categories of workflows: primary and supplemental.

A *primary* workflow is a workflow with one or more tasks that have supplemental tasks linked to them. This is the default view that appears when you open the Browser grid.

A *supplemental* workflow is a workflow whose tasks are linked to tasks in a rules-based workflow. A supplemental workflow cannot exist on its own and is allowed only as an “add-on” to another workflow.

NOTE: Please refer to the *Workflow Template Reference Guide* located on Product Assistance and within the Release Notes gadget for more information about different workflow types.

Example 1: Browser grid for primary workflows

Workflow Browser

Folder: Tax Type ALL, Year ALL, Period ALL

Workflow: W/F Template ALL, Entity Name, Entity Number, Jurisdiction, Workflow Type ALL

Group Code: Group Code ALL

Search Clear

My Work

Documents

DataFlow

Control Log

Reports

Calendar

Entity Browser

Calendar Setup

Setup

Workflow Browser Primary Supplemental

Drag a column here to group by.

Tax Type	Year	Period	Entity Name	Entity Number	Jurisdiction	W/F Template	Description
CORPORATE	2014	12/31	APEX Parent	324	FEDERAL	Parallel with chec...	
INCOME TAX	2014	12/31	ABC Corp	12345678	FEDERAL	Serial with checklist	
STATE INCOME	2014	3/31	ABC Corp	12345678	CALIFORNIA	CA State Income ...	2014 California
ANNUAL REPORT	2014	12/31	FM Enterprises 1	3330	ALABAMA	1120	
CORPORATE	2014	11/30	FM Nov 3	1104	CALIFORNIA	1120	
FEDERAL INCOME	2014	12/31	ABC Corp	12345678	FEDERAL	Rule with Checklist	Preparing/filing
FEDERAL INCOME	2014	12/31	FM Associates, Inc.	3331	FEDERAL	1120	
ANNUAL REPORT	2014	6/30	FM Printing & Design, Inc.	3398	ARKANSAS	1120	
STATE INCOME	2013	12/31	Haden Manufacturing, Inc.	342	NEW YORK	LB State Return P...	
ANNUAL REPORT	2013	12/31	FM2, Inc.	3331	AL	route backwards	
ANNUAL REPORT	2013	7/31	FM Partners	3339	BELGIUM	Arrange a Meeting	
ANNUAL REPORT	2013	3/31	FMA Engineering 24	3338	ARIZONA	Arrange a Meeting	
UNASSIGNED	2013	4/30	ABC Holdings 9	20008	ARKANSAS	United Kingdom ...	
ANNUAL REPORT	2013	2/28	AAA-Updated	1	Federal	1120	
COMPANY SECRETARY	2013	12/31	FM Printing & Design, Inc.	3398	AUSTRALIA	Arrange a Meeting	
CORPORATE	2013	9/30	Samson Inc.	2345	ALABAMA LOCAL	SamWFSStandard	Sample workflo
FEDERAL INCOME	2013	12/31	Acme Sidings	002	ALASKA	Federal and/or St...	
FEDERAL INCOME	2013	12/31	Haden Manufacturing, Inc.	342	FEDERAL	LB Federal Retur...	
CORPORATE TAX	2013	12/31	FM Associates, Inc.	3331	ALASKA	1120	sample creator
CORPORATE TAX	2013	12/31	Acme Sidings	002	AUSTRALIA	AU Consolidated ...	

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Example 2: Browser grid for supplemental workflows

Workflow Browser

Workflow: W/F Template ALL, Entity Name, Entity Number

Search Clear

My Work

Documents

DataFlow

Control Log

Reports

Calendar

Entity Browser

Calendar Setup

Setup

Workflow Browser Primary Supplemental

Drag a column here to group by.

W/F Template	Entity Number	Entity Name
Default Supplemental 2011 no2	1104	FM Nov 3
Default Supplemental 2011 no2	3331	FM2, Inc.
Default Supplemental 2012	1104	FM Nov 3
State Return Process	3338	FM Partnership 2
Supplemental LB	1104	FM Nov 3
Supplemental workflow 1108	3331	FM Associates, Inc

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CUSTOMIZING THE BROWSER GRID

You can customize the appearance of the Browser grid in the following ways:

- Changing the order or width of the grid columns
- Changing the sort order of data within a column
- Grouping by columns.

CHANGING THE ORDER OF THE GRID COLUMNS

To reorder the columns, click a column heading, then drag it to where you would like to see it on the grid. Red arrows appear in the designated location as shown in the following example.

In this example, we want to place the Period column before the Year column. The red arrows indicate that we are moving the Period column to the left of the Year column.

The word "Period" appears in gray to show that we are dragging this column header to a new position on the Browser grid.

Drag a column here to group by.

	Tax Type	Year▲	Period	Period	Entity Name	Entity Number	Jurisdiction	W/F Template	
	INTERNATIONAL				ACME Holdings E...	602	CA	Federal and/or ...	
	INTERNATIONAL ...	2009		12/31	ACME Trucking, ...	603	Federal	Federal and/or ...	
	ANNUAL REPORT	2010		1/31	ACME New York, ...	303	CHILE	New Client Docu...	
	INTERNATIONAL ...	2010		12/31	ACME Interamer...	688	SOUTH AFRICA	Income Tax Ret...	
	STATE INCOME	2011		1/31	ACME Trucking, ...	603	nj	Buy Equipment	
	FEDERAL INCOME	2011		1/31	Acme Inc. of Te...	W003200	federal	Buy Equipment	T
	FEDERAL INCOME	2011		1/31	ACME Trucking, ...	603	Federal	Buy Equipment	
	FEDERAL INCOME	2011		1/31	ACME Trucking, ...	603	CA	Buy Equipment	t
	FEDERAL INCOME	2011		6/30	ACME Interamer...	688	CALIFORNIA	Test Workflow T...	t
	CORPORATE TAX	2012		12/31	ACME New York, ...	303	Alabama	Luxembourg CT	1
	CORPORATE TAX	2012		12/31	Acme Sidings	002	FEDERAL	Compute Tax PR	
	CORPORATE TAX	2012		12/31	Acme Bricks	001	ALABAMA	Australia CT	
	INDIRECT TAX	2012		12/31	ACME Interamer...	688	ALABAMA	Finland Indirect	T
	CORPORATE	2012		12/31	Acme Bricks	001	AUSTRALIA	Australia CT Tes...	
	CORPORATE	2012		12/31	Acme Bricks	001	AUSTRALIA	Belgium CT	
	UNASSIGNED	2012		1/31	ACME Trucking, ...	603	ALASKA	Consolidation W...	C
	CORPORATE	2012		1/31	ACME Financial ...	340	CALIFORNIA	Transfer Pricing	1
	CORPORATE	2012		1/31	ACME Holdings E...	602	SOUTH AFRICA	Transfer Pricing	
	COMPANY SECRE...	2012		12/31	Acme Bricks	001	FEDERAL	Compute Tax PR	
	CORPORATE TAX	2012		1/31	Acme Bricks	001	FEDERAL	Compute Tax PR	

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CHANGING THE WIDTH OF A COLUMN

To change the width of the columns, click and drag a column's border to decrease or increase the width. An arrow appears on the column's border indicating that you are changing the width.

TIP: Make sure that you save your orientation settings by selecting **Save Preferences** from the **Actions** menu.

CHANGING THE WAY DATA SORTS WITHIN A COLUMN

To change the sort order of data within a column, click a column header to sort data in ascending order. Click the column header again to sort data in descending order. The white arrow that appears in the column header indicates that you are sorting by that column.

Workflow Browser Primary | Supplemental

Drag a column here to group by.

	Tax Type	Period	Year▲	Entity Name	Entity Number	Jurisdiction	W/F Template	Description
	INTERNATIONAL INCOME	5/31	2007	ACME Holdings E...	602	CA	Federal and/or S...	
	INTERNATIONAL INCOME	12/31	2009	ACME Trucking, ...	603	Federal	Federal and/or S...	
	ANNUAL REPORT	1/31	2010	ACME New York, ...	303	CHILE	New Client Docu...	
	INTERNATIONAL INCOME	12/31	2010	ACME Interameri...	688	SOUTH AFRICA	Income Tax Ret...	
	STATE INCOME	1/31	2011	ACME Trucking, ...	603	nj	Buy Equipment	
	FEDERAL INCOME	1/31	2011	Acme Inc. of Te...	W003200	federal	Buy Equipment	Testing
	FEDERAL INCOME	1/31	2011	ACME Trucking, ...	603	Federal	Buy Equipment	
	FEDERAL INCOME	1/31	2011	ACME Trucking, ...	603	CA	Buy Equipment	testing
	FEDERAL INCOME	6/30	2011	ACME Interameri...	688	CALIFORNIA	Test Workflow T...	test
	CORPORATE TAX	12/31	2012	ACME New York, ...	303	Alabama	Luxembourg CT	11
	CORPORATE TAX	12/31	2012	Acme Sidings	002	FEDERAL	Compute Tax PR	
	CORPORATE TAX	12/31	2012	Acme Bricks	001	ALABAMA	Australia CT	
	INDIRECT TAX	12/31	2012	ACME Interameri...	688	ALABAMA	Finland Indirect	Test with
	CORPORATE	12/31	2012	Acme Bricks	001	AUSTRALIA	Australia CT Tes...	
	CORPORATE	12/31	2012	Acme Bricks	001	AUSTRALIA	Belgium CT	
	UNASSIGNED	1/31	2012	ACME Trucking, ...	603	ALASKA	Consolidation W...	Compute T
	CORPORATE	1/31	2012	ACME Financial P...	340	CALIFORNIA	Transfer Pricing	1
	CORPORATE	1/31	2012	ACME Holdings E...	602	SOUTH AFRICA	Transfer Pricing	
	COMPANY SECRETARY	12/31	2012	Acme Bricks	001	FEDERAL	Compute Tax PR	
	CORPORATE TAX	1/31	2012	Acme Bricks	001	FEDERAL	Compute Tax PR	

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NOTE: You can sort by only one column at a time.

GROUPING BY COLUMNS

To group by columns, click a column name, then drag the column name to the white space above the column headers. In the following example, we grouped data by the **Tax Type** column.

Workflow Browser Primary | Supplemental

Group by: Tax Type▲

	Tax Type	Period	Year▲	Entity Name	Entity Number	Jurisdiction	W/F Template
+	Tax Type : **UNASSIGNED**						
+	Tax Type : ANNUAL REPORT						
+	Tax Type : COMPANY SECRETARY						
+	Tax Type : CORPORATE						
+	Tax Type : CORPORATE TAX						
	CORPORATE TAX	12/31	2012	ACME New York, ...	303	Alabama	Luxembourg CT
	CORPORATE TAX	12/31	2012	Acme Sidings	002	FEDERAL	Compute Tax PR
	CORPORATE TAX	12/31	2012	Acme Bricks	001	ALABAMA	Australia CT
	CORPORATE TAX	1/31	2012	Acme Bricks	001	FEDERAL	Compute Tax PR

- To collapse the selected group, click the - next to a group's name.
- To expand the selected group, click the +.
- To remove the grouping, click the group name in the **Group by** list, then drag it back to the Browser grid.

TIP: Make sure to save your orientation settings by selecting **Save Preferences** from the **Actions** menu.

USING THE PAGE NAVIGATION ICONS

Your Browser grid may have more than one page. Use the following page navigation tools to move through Browser grid pages quickly.

WorkFlow Browser Primary | Supplemental

Drag a column here to group by.

	Tax Type	Year▼	Period	Entity Name	Entity Number	Jurisdiction	W/F Template	Description
	UNASSIGNED	2014	1/31	ACME Interamericana, S. A.	688	BRAZIL	Document workflow	
	CORPORATE	2014	12/31	APEX Parent	324	FEDERAL	Parallel with chec...	
	INCOME TAX	2014	12/31	ABC Corp	12345678	FEDERAL	Serial with checklist	
	STATE INCOME	2014	3/31	ABC Corp	12345678	CALIFORNIA	CA State Income...	2014 California S...
	ANNUAL REPORT	2014	12/31	FM Enterprises 1	3330	ALABAMA	1120	
	CORPORATE	2014	11/30	FM Nov 3	1104	CALIFORNIA	1120	
	FEDERAL INCOME	2014	12/31	ABC Corp	12345678	FEDERAL	Rule with Checklist	Preparing/filing t...
	FEDERAL INCOME	2014	12/31	FM Associates, Inc	3331	FEDERAL	1120	
	ANNUAL REPORT	2014	6/30	FM Printing & Design, Inc.	3398	ARKANSAS	1120	
	STATE INCOME	2013	12/31	Haden Manufacturing, Inc.	342	NEW YORK	LB State Return ...	
	ANNUAL REPORT	2013	12/31	FM2, Inc.	3331	AL	route backwards	
	ANNUAL REPORT	2013	7/31	FM Partners	3339	BELGIUM	Arrange a Meeting	
	ANNUAL REPORT	2013	3/31	FMA Engineering 24	3338	ARIZONA	Arrange a Meeting	
	UNASSIGNED	2013	4/30	ABC Holdings 9	20008	ARKANSAS	United Kingdom ...	
	ANNUAL REPORT	2013	2/28	AAA-Updated	1	Federal	1120	
	COMPANY SECRE...	2013	12/31	FM Printing & Design, Inc.	3398	AUSTRALIA	Arrange a Meeting	
	CORPORATE	2013	9/30	Samson Inc.	2345	ALABAMA LOCAL	SamWFStandard	Sample workflow
	FEDERAL INCOME	2013	12/31	Acme Sidings	002	ALASKA	Federal and/or St...	
	FEDERAL INCOME	2013	12/31	Haden Manufacturing, Inc.	342	FEDERAL	LB Federal Retur...	
	CORPORATE TAX	2013	12/31	Acme Sidings	002	AUSTRALIA	AU Consolidated ...	

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- Click to return to the first page of the Browser grid.
- Click to return to the previous page.
- Click to move to the next page.
- Click to move to the last page of the Browser grid.

To browse to a specific page, type the page number in the **Page** field, then press the **Enter** key.

LEARNING ABOUT THE ACTIONS MENU

The **Actions** menu contains specific options for each workflow in the Browser grid. To open the **Actions** menu for a workflow, click a workflow to select it, then click the **Actions** button.

TIP: Instead of clicking the **Actions** button, you can right-click a workflow in the grid to open the **Actions** menu.

Options available from the **Actions** menu depend on the type of workflow, which means that some menu options may be unavailable. Any unavailable actions appear in gray.

VIEWING THE PRIMARY WORKFLOWS ACTIONS MENU

Options available from the **Actions** menu depend on the type of workflow, which means that some menu options may be unavailable. Any unavailable actions appear in gray.

Action Menu Option	Description	Workflow Type
New Folder	Select this option to create a new workflow folder.	Serial Parallel
New Rule-Based Work-Flow	Select this option to create a new rules-based workflow using the Rules-Based Workflow Creation wizard.	Rules-based
Roll Forward WorkFlow	Select this option to roll information from one workflow to another. WorkFlow Manager provides a Roll Forward wizard that you can use to roll your information forward from year to year.	Rules-based
Control Sheet	Select this option to open the Print Control Sheet dialog box where you can select different sections of the control sheet for printing. Sections include Tasks , Events , Checklists , and Notes .	All
New WorkFlow	Select this option to create a new workflow based on the selected workflow's template.	Serial Parallel
WorkFlow Properties	Select this option to view or edit the selected workflow's properties.	All
Delete WorkFlow(s)	Select this option to delete the selected workflow.	All
WorkFlow History	Select this option to review the selected workflow's history. The WorkFlow History dialog box opens, and includes information about the workflow such as who updated it, when it was updated, and what part of the workflow was updated.	All
Assignments	Select this option to open a dialog box with tabs for creating and modifying Role Assignments and DataPack Assignments.	Rules-based
Lock WorkFlow(s)	Select this option to lock a workflow to prevent editing of tasks, events, or documents. Locked workflows appear with a red lock on top of the workflow icon in the first column as shown here: 	All

Action Menu Option	Description	Workflow Type
Reset All Checklists	Select this option to change the status of all checklist items to Blank.	All
Import	Select Import , then select one of the following options: Get Update Template: For serial and parallel workflows, you can select the WorkFlow Properties and Task Properties check boxes to include this information in your import file. Update WorkFlow: Select this option, then select a file to use in the File to Import dialog box.	Serial Parallel
Export	Select this option to export the entire Browser grid in CSV format. You can choose to open the grid in Excel or save the file to your computer.	All
Customize View	Select this option to customize your Browser grid view. The Show/Hide Grid Columns dialog box appears, and includes a list of check boxes for each available column. Select a check box next to a column name to have the column appear on your grid. NOTE: Make sure that you select Save Preferences from the Actions menu to save the columns that you selected.	All
Save Preferences	Select this option to save any changes that you made to the column width, order, or Customize View settings of the Browser grid.	All
Save Preferences for All	Select this option to change the screen preferences for all users.	All

VIEWING THE SUPPLEMENTAL WORKFLOWS ACTIONS MENU

Options available from the **Actions** menu depend on the type of workflow, which means that some menu options may be unavailable. Any unavailable actions appear in gray.

Action Menu Option	Description
New WorkFlow Association	Select this option to associate the supplemental workflow with an entity using the Associate Supplemental Workflow wizard. Complete each step in the wizard, including selecting an entity, selecting a supplemental workflow, and completing any workflow properties associated with that supplemental workflow.
WorkFlow Properties	Select this option to view or edit the selected supplemental workflow's properties.
Delete WorkFlow(s)	Select this option to delete the supplemental selected workflow.