WORKFLOW TOOLS

WorkFlow Manager Folder View Quick Guide November 2014

Workflow Manager helps you to stay organized by grouping different components of your workflow into a folder.

Each workflow folder allows you to display information in logical categories that are set up at the drawer level during implementation.

Workflow folders allow you to

- Group workflows according to a specific departmental work structure, such as Income, Planning, or Provisions.
- Incorporate a second tier of organization through workflow tax type or function, such as Audit, State, or Federal.
- View tasks and events, documents, DataFlow requests, checklists, and notes associated with a selected workflow.
- View Checkpoint articles associated with a selected workflow.
- Switch between similar workflows.

The information within workflow folders is organized and grouped by the following tabs:

- Tasks
- Events
- Documents
- DataFlow (if licensed)
- Checklists
- Notes
- Research

NOTE: You may not have permission to view all tabs listed. Please contact your administrator for assistance.

ACCESSING WORKFLOW FOLDERS

You can open a workflow folder in one of the following ways:

- **Through WorkFlow Manager:** Double-click a workflow
- **Through My Work within WorkFlow Manager:** Double-click a task in the Tasks grid
- **Through the Folder Workflows section of a workflow folder window:** Double-click a template name to open a different folder

IN THIS GUIDE:

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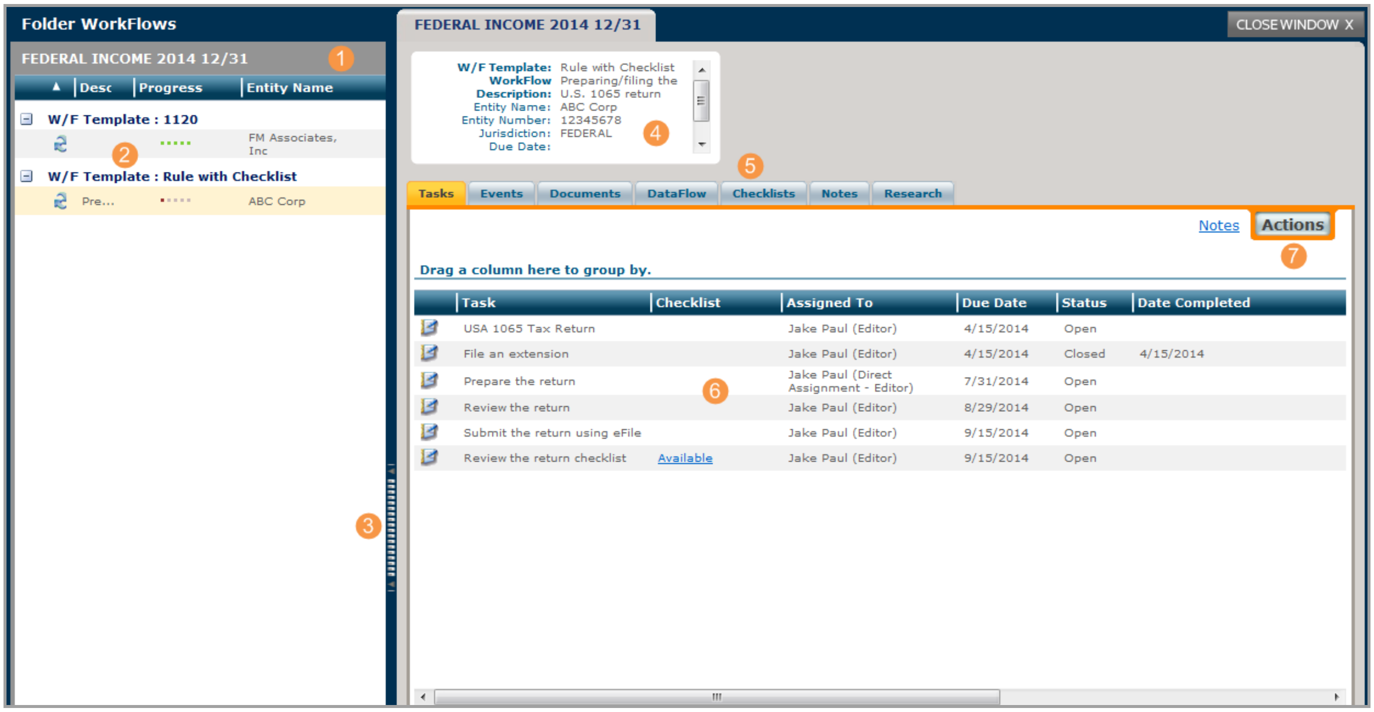
LEARNING ABOUT THE FOLDER COMPONENTS

Each workflow folder contains information specific to the selected workflow, including the following components:

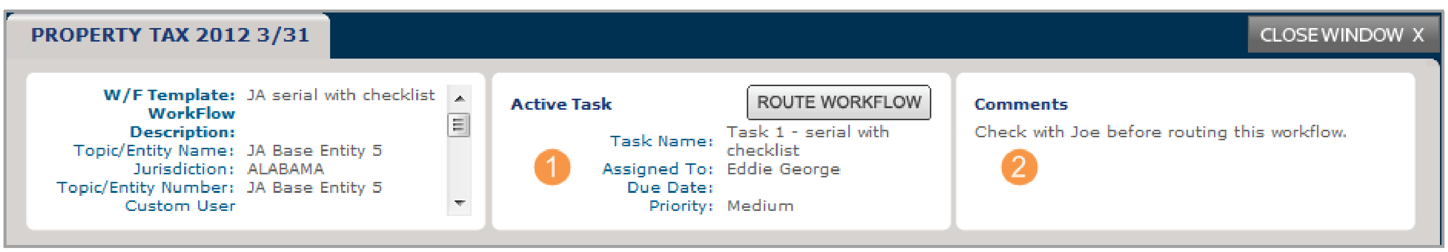


1	**Folder name:** The name of the folder that contains the workflow. The folder name appears in a gray bar on the left side panel and on a gray tab on the right side panel.
2	**Workflow template names:** Workflow template names associated with the workflow folder appear in a list. Dots indicating the workflow's completion status appear below the template name. • **Red dots:** Each red dot indicates the workflow's progress level. More red dots equal more tasks completed for this workflow. • **Green dots:** All green dots indicate that the workflow is complete.
3	**Splitter:** Click the splitter to close the left side panel and view the folder's contents in a larger format.

4	**Workflow summary:** A description of the workflow. The information that appears is based on how the drawer is configured during implementation. Fields in bold are unique to this workflow. Common summary descriptions include workflow template name, description, period, and jurisdiction. Use the scroll bar to view all of the information. **NOTE:** The workflow summary information is separate from the folder tabs, and will appear regardless of the folder tab selected.
5	**Folder tabs:** Tabs for the various sections of the workflow. The tab that is in use appears in yellow.
6	**Folder information:** Information associated with the workflow that is specific to the tab name. The information appears differently according to the type of tab. For example, on the **Tasks** tab, the Tasks grid appears and shows all tasks associated with the workflow. However, on the **Documents** tab, a grid appears that shows all documents associated with the workflow, while on the **Notes** tab, drop-down lists allow you to create notes related to the workflow.
7	**Actions menu:** Contains options specific to the tab name. For example, options available from the **Actions** menu on the **Tasks** tab are different from options available from the **Actions** menu on the **Documents** tab.

In serial workflows, the workflow folder includes these components as well.

NOTE: The workflow summary information is separate from the folder tabs, and will appear regardless of the folder tab selected.



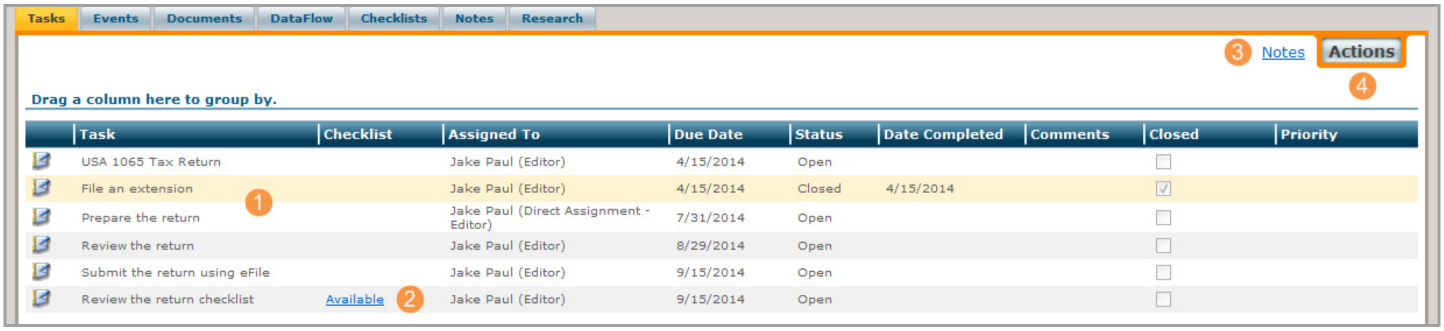
1	**Active Task summary:** A description of the selected task, including the name, assignment, due date, and priority. **NOTE:** The **Route Workflow** button is unique to serial workflows. Click **Route Workflow** to route the workflow to the next person assigned.
2	**Comments section:** Any comments pertaining to the selected task.

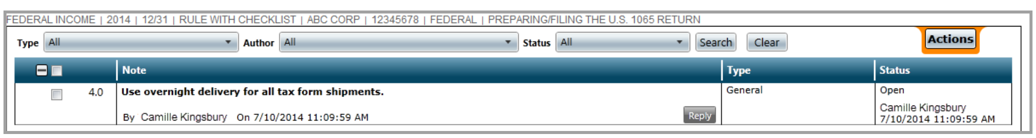
LEARNING ABOUT THE FOLDER TABS

Tabs may appear differently depending on the type of workflow. Any differences in appearance will be noted in each tab's section of this guide.

LEARNING ABOUT THE TASKS TAB

Use the **Tasks** tab to view your workflow tasks (both work and event), task assignments, due dates, task status, **Actions** menu, and other information.



1	**Tasks grid:** The Tasks grid lists all tasks (work and event) for the selected workflow. Selected tasks appear in orange.
2	**Available link:** Click the **Available** link in the **Checklist** column to open the **Checklists** tab. This link appears only if a checklist is available for the selected task. **NOTE:** If a checklist is required, the **Required** link appears in the **Checklist** column.
3	**Notes link:** Click the **Notes** link to open the **Notes** window. From there, you can view existing notes related to this workflow, add or delete notes, or view the history of a note.  This view is identical to what appears on the **Notes** tab of a workflow folder.
4	**Actions menu:** Click the **Actions** button to open a menu with options related to the **Tasks** tab.

LEARNING ABOUT THE TASKS TAB ACTIONS MENU

The **Actions** menu for the **Tasks** tab contains specific actions for each task in the grid. The options available from the **Actions** menu depend on the type of workflow and your permissions, meaning that some menu options may be unavailable. Any unavailable actions appear in gray.

You can open the **Actions** menu in one of the following ways:

- Click a task from the Tasks grid to select it, then click the **Actions** button.
- Select a task, then right-click it to open the **Actions** menu.

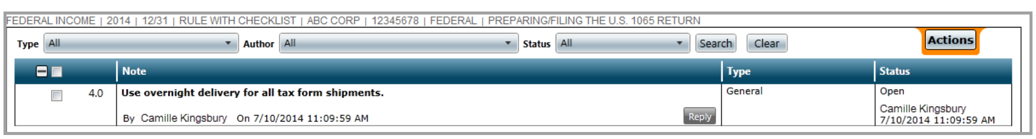
From the **Actions** menu, you can select from the following options:

Action Menu Option	Description	Workflow Type
Route Task	Select this option to route your task to the person responsible for the next task in the workflow.	**Serial**
Change Status	Select this option to modify a task's status. **NOTE:** To change a task's status for a rules-based workflow, open the **Task Properties** tab of the **Task Properties** dialog box.	**Serial** **Parallel**
Task Properties	Select this option to view the selected task's properties.	**All**
Task History	Select this option to view the task's history, including details of each modification.	**All**
Reopen Task	Select this option to open a closed task.	**Rules-based**
Close - Not Relevant	Select this option to close tasks that are not relevant to you.	**Rules-based**
Add WorkFlow Task	Select this option to add a new dynamic WorkFlow task.	**Rules-based** **Dynamic Serial** **Dynamic Parallel**
Edit WorkFlow Task	Select this option to edit a dynamic WorkFlow task.	**Rules-based** **Dynamic Serial** **Dynamic Parallel**
Delete WorkFlow Task	Select this option to delete a dynamic WorkFlow task.	**Rules-based** **Dynamic Serial** **Dynamic Parallel**
Assignments	Select this option to open a dialog box with tabs for creating and modifying Role Assignments and DataPack Assignments.	**Rules-based**
Direct Assignments	Select this option to directly assign a specific task to a specific user. Click **Save** to save your work.	**Rules-based**
Reset Checklist	Select this option to reset your checklist for selected tasks.	**All**
Add Document	Select this option to add a document to the selected task.	**All**
View Document(s)	Select this option to view the **Documents** tab of the **Task Properties** dialog box.	**All**
Export	Select this option to export the entire Tasks 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 Tasks grid. 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 Tasks 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 Tasks grid.	**All**

Action Menu Option	Description	Workflow Type
Save Preferences for All	Select this option to change the screen preferences for all users.	**All**

LEARNING ABOUT THE EVENTS TAB

Use the **Events** tab to view each event associated with your workflow, including information about due dates, authorities, and assignments. The **Events** tab includes an **Actions** menu with additional options as well.

1	**Assigned | Related links:** For all workflow types, the **Events** tab includes links to assigned and related events. An event is considered to be "related" if the entity name, entity ID, year, jurisdiction, and tax type match those of the workflow. If an event is related to a workflow, you can assign the event to that particular workflow after it has been scheduled. **NOTE:** Rules-based workflows use assigned events only. For more information about assigned and related events, please refer to the *Calendar User Guide.*
2	**Events grid:** The Events grid lists all events for the selected workflow. Selected events appear in orange.
3	**Notes link:** Click the **Notes** link to open the **Notes** window. From there, you can view existing notes related to this workflow, add or delete notes, or view the history of a note.  This view is identical to what appears on the **Notes** tab of a workflow folder.
4	**Actions menu:** Click the **Actions** button to open a menu with options related to the **Events** tab.

LEARNING ABOUT THE EVENTS TAB ACTIONS MENU

The **Actions** menu for the **Events** tab contains specific actions for each item in the Events grid. The options available from the **Actions** menu depend on the type of workflow and your permissions, meaning that some menu options may be unavailable. Any unavailable actions appear in gray.

You can open the **Actions** menu in one of the following ways:

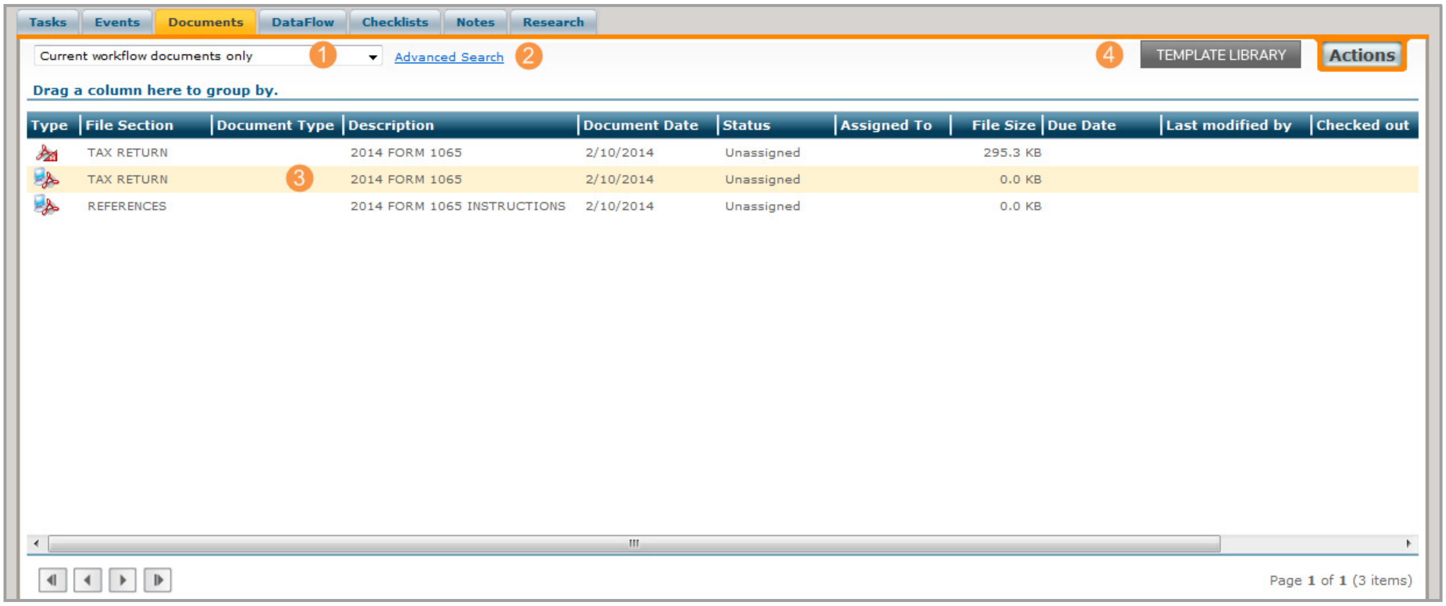
- Click an event from the Events grid to select it, then click the **Actions** button.
- Select an event, then right-click it to open the **Actions** menu.

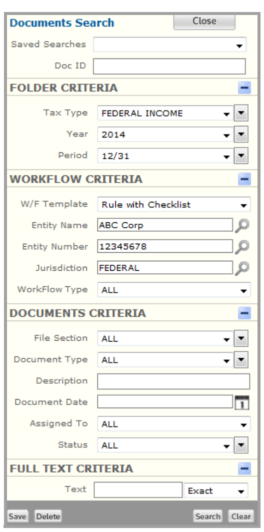
From the **Actions** menu, you can select from the following options:

Action Menu Option	Description	Workflow Type
Change Status	Select this option to change the event's status.	**Serial** **Parallel**
Assign Event(s)	Select this option to assign a related event to the workflow. Doing so moves the event from the Related link to the Assigned link. **NOTE:** The option name appears as **Unassign Event(s)** if an event is already assigned.	**Serial** **Parallel**
Schedule New Event(s)	Select this option to schedule a new event through the Scheduled Events wizard.	**Serial** **Parallel**
Edit Scheduled Event(s)	Select this option to open the **Scheduled Event Profile** window and modify the event settings on the **Event Details**, **Payments & Extensions**, and **Work Status** tabs.	**All**
Delete Event(s)	Select this option to delete the event and remove it from the Events grid.	**Serial** **Parallel**
Extend Event(s)	Select this option to extend the event's due date.	**Serial** **Parallel**
Re-calculate	Select this option to re-calculate event information.	**All**
Scheduled Events History	Select this option to view the event's history, including details of each modification.	**All**
Export	Select this option to export the entire Events 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 Events grid. 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 Events 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 Events grid.	**All**
Save Preferences for All	Select this option to change the screen preferences for all users.	**All**

LEARNING ABOUT THE DOCUMENTS TAB

The **Documents** tab includes a grid that lists each document associated with the workflow, including a description, file size, and document date. Additional searching options, such as the **Advanced Search** link and **Template Library** button are available, as well as an **Actions** menu.

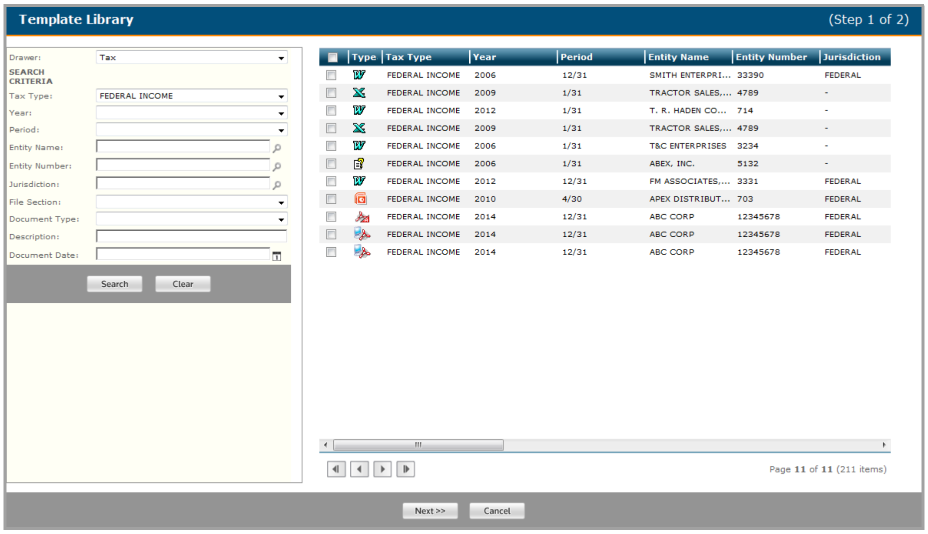


1	Select an option to tailor your **Documents** tab view: • Current workflow documents only • Current workflow category • All folder documents
2	Click the **Advanced Search** link to open the **Documents Search** dialog box. From there, you can enter additional search criteria for documents. 
3	**Documents grid:** The Documents grid lists all documents for the selected workflow. Selected documents appear in orange.

4

Click **Template Library** to open the Template Library wizard. Use the wizard to search for and select documents that you want to copy to your workflow.

NOTE: You can copy up to 20 documents at a time.



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Actions menu: Click **Actions** to view a list of options available for the **Documents** tab.

LEARNING ABOUT THE DOCUMENTS TAB ACTIONS MENU

The **Actions** menu for the **Documents** tab contains specific actions for each item in the Documents grid. The options available from the **Actions** menu depend on your permissions, meaning that some menu options may be unavailable. Any unavailable actions appear in gray.

You can open the **Actions** menu in one of the following ways:

- Click an item in the Documents grid to select it, then click the **Actions** button.
- Select an item, then right-click it to open the **Actions** menu.

From the **Actions** menu, you can select from the following options (applicable to all workflow types):

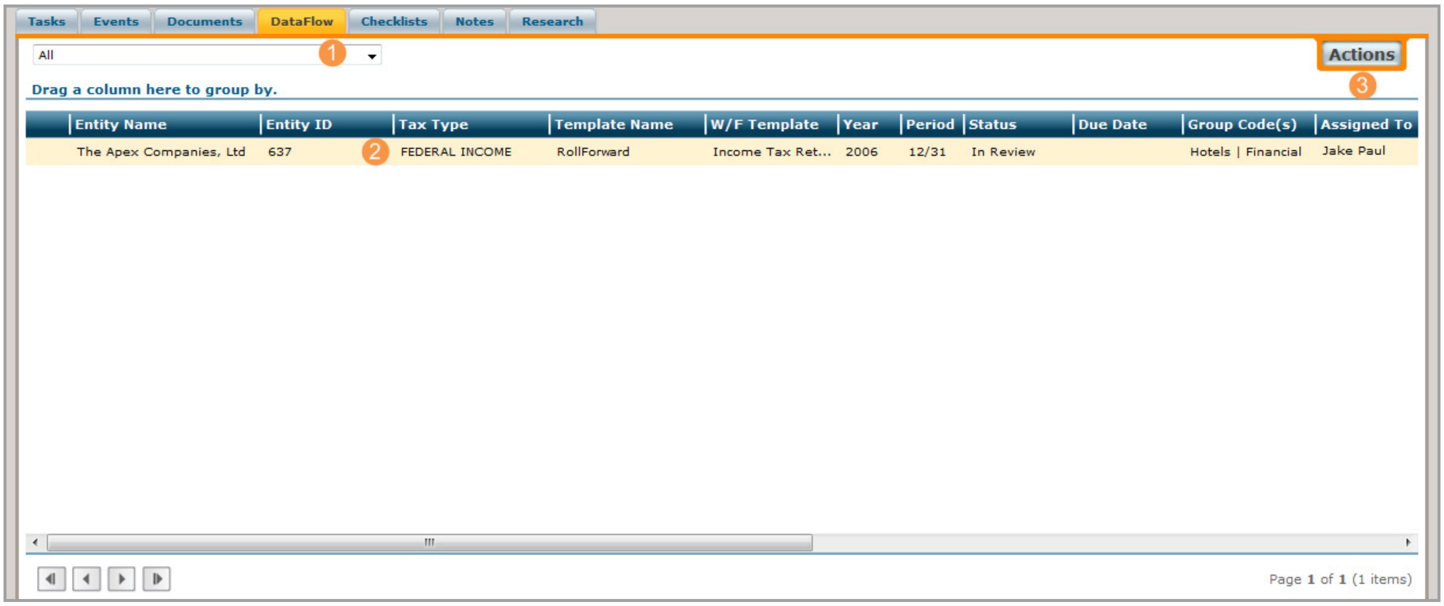
Action Menu Option	Description
Email Document(s)	Select this option to email documents directly from WorkFlow Manager.
Email Document(s) Using Outlook	Select this option to use your Microsoft Outlook address book to send a document in native format (such as Word, Excel, or PDF), as a ZIP file, or as a link.
Email Document(s) Using Lotus Notes	Select this option to use your Lotus Notes address book to send a document in native format (such as Word, Excel, or PDF), as a ZIP file, or as a link.
Add Document	Select this option to add a document to the workflow. The **Add Document** dialog box appears, and includes options for selecting a document type, index values, and document assignments.
New Excel Document	Select this option to add an Excel file to the workflow. The **New Excel Document** dialog box appears, and includes options for selecting index values and document assignments.

Action Menu Option	Description
New Word Document	Select this option to add a Word document to the workflow. The **New Word Document** dialog box appears, and includes options for selecting index values and document assignments.
Other Actions	Select this option, then select one of the following options: • Copy Document(s) • Copy Hyperlink(s) to Clipboard • Export Document
Open Template Library	Select this option to open the Template Library wizard.
Version Control	Select this option to number multiple versions of a document in sequential order. **NOTE:** This feature must be enabled for the selected drawer.
PDF	Select this option, then select one of the following options: • Print Documents • View Print Queue
Review Document(s)	Select this option to archive or unarchive a document.
Document History	Select this option to view the history for the selected document.
Customize View	Select this option to customize your Documents grid. 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 Documents grid. **NOTE:** Make sure that you select **Save Preferences** from the **Actions** menu to save the columns that you selected.
Save Preferences	Select this option to save any changes that you made to the column width, order, or Customize View settings of the Documents grid.
Save Preferences for All	Select this option to change the screen preferences for all users.
Saved Search	Click the **Advanced Search** link to open the **Documents Search** dialog box. From there, you can select a previously saved search from the **Saved Searches** list.

LEARNING ABOUT THE DATAFLOW TAB

The **DataFlow** tab includes a grid that lists each DataFlow associated with the workflow, including the entity name, tax type, DataFlow template name, and WorkFlow template name, as well as an **Actions** menu.

NOTE: Refer to the *DataFlow User Guide* for more information about the DataFlow application.



1	**Type of DataFlow view:** Use this list to select an option to tailor your **DataFlow** tab view: • All DataFlows • Directly Linked DataFlow(s) • Related DataFlow(s)
2	**DataFlow grid:** The DataFlow grid lists all DataFlow requests for the selected workflow. Selected requests appear in orange.
3	**Actions menu:** Click **Actions** to view a list of options available for the **DataFlow** tab.

LEARNING ABOUT THE DATAFLOW TAB ACTIONS MENU

The **Actions** menu for the **DataFlow** tab contains specific actions for each item in the DataFlow grid. The options available from the **Actions** menu depend on your permissions, meaning that some menu options may be unavailable. Any unavailable actions appear in gray.

You can open the **Actions** menu in one of the following ways:

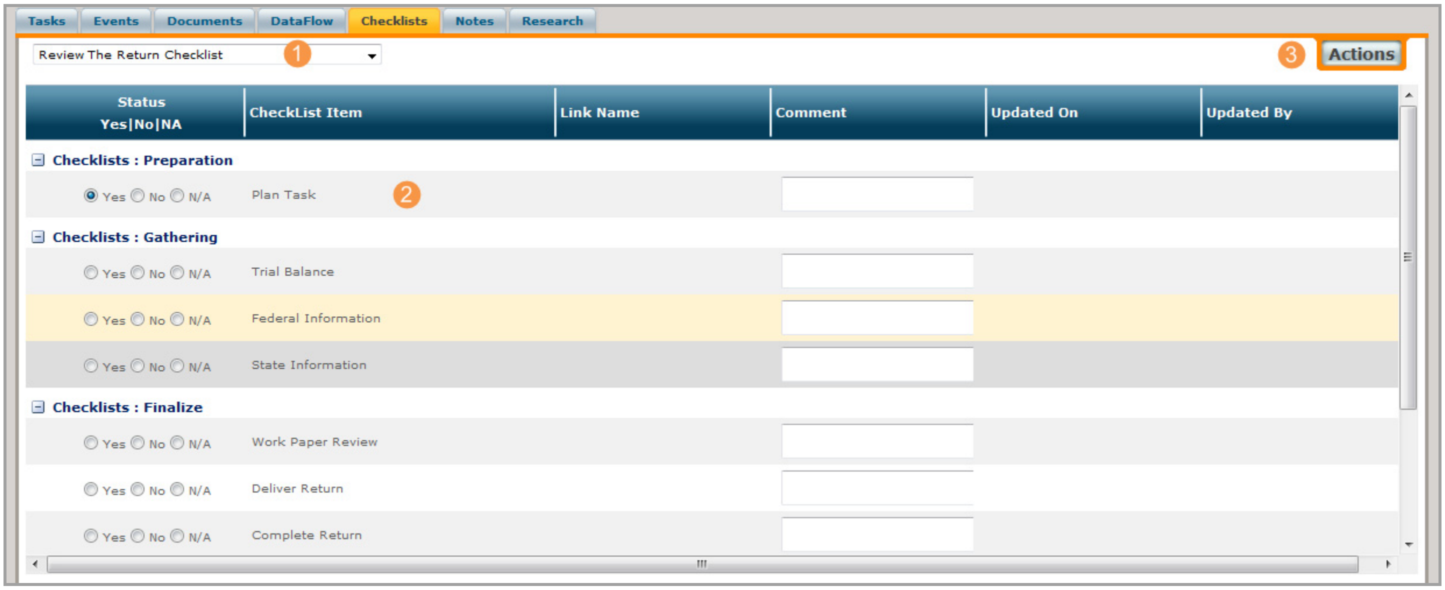
- Click an item in the DataFlow grid to select it, then click the **Actions** button.
- Select an item, then right-click it to open the **Actions** menu.

From the **Actions** menu, you can select from the following options (applicable to all workflow types):

Action Menu Option	Description
New DataFlow Request	Select this option to create a new DataFlow request. The New DataFlow Request wizard begins and allows you to select a DataFlow template and workflow template for your DataFlow request.
DataFlow Properties	Select this option to view the selected DataFlow request's properties.
Delete DataFlow Request(s)	Select this option to delete the selected DataFlow request.
Override Checkout	Select this option to override the existing checkout option.
Send Reminder(s)	Select this option to send a reminder to the assigned user.
DataFlow Notes	Select this option to open the **DataFlow Notes** dialog box where you can enter comments about the selected DataFlow request.
Change Request Status	Select this option to change the DataFlow request's status. The assigned user receives an email reminder, and the status change appears on the DataFlow grid.
DataFlow Documents	Select this option to open the **DataFlow Documents** dialog box where you can add a document to the selected DataFlow request.
Assign User	Select this option to open the **Assign User(s) to DataFlow** dialog box where you can select a user or group to assign and notify.
Request History	Select this option to open the **DataFlow Request Audit Report** dialog box where you can view details for each modification to the selected DataFlow request.
Roll Forward Requests)	Select this option to open the Roll Forward DataFlow Requests wizard.
Recalculate Request(s)	Select this option to recalculate the selected DataFlow request.
Export	Select this option to export the entire DataFlow grid in CSV format. You can choose to open the grid in Excel or save the file to your computer.
Customize View	Select this option to customize your DataFlow grid. 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 DataFlow grid. **NOTE:** Make sure that you select **Save Preferences** from the **Actions** menu to save the columns that you selected.
Save Preferences	Select this option to save any changes that you made to the column width, order, or Customize View settings of the DataFlow grid.
Save Preferences for All	Select this option to change the screen preferences for all users.

LEARNING ABOUT THE CHECKLISTS TAB

Checklists are user-defined lists that allow you to track the status of tasks in a workflow. The **Checklists** tab includes a grid that lists each checklist associated with the workflow, as well as an **Actions** menu.



1	**List of tasks with checklists:** Select a task from the list to view the checklists associated with it.
2	**Checklists grid:** The Checklists grid lists all checklists for the selected workflow. Selected checklists appear in orange.
3	**Actions menu:** Click **Actions** to view a list of options available for the **Checklists** tab.

LEARNING ABOUT THE CHECKLISTS TAB ACTIONS MENU

The **Actions** menu for the **Checklists** tab contains specific actions for each item in the Checklists grid. The options available from the **Actions** menu depend on your permissions, meaning that some menu options may be unavailable. Any unavailable actions appear in gray.

You can open the **Actions** menu in one of the following ways:

- Click an item in the Checklists grid to select it, then click the **Actions** button.
- Select an item, then right-click it to open the **Actions** menu.

From the **Actions** menu, you can select from the following options (applicable to all workflow types):

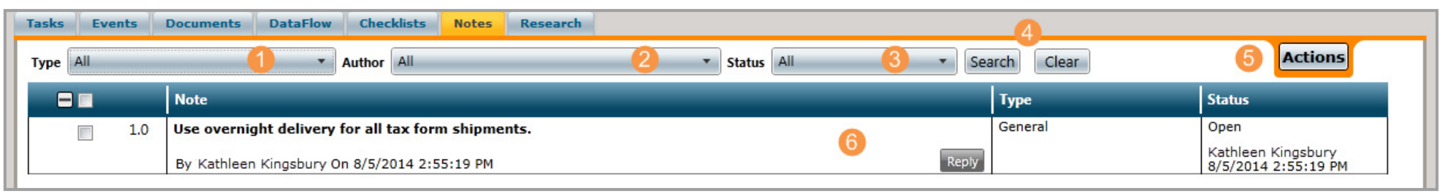
Action Menu Option	Description
Edit Item(s)	Select this option to open the **Checklist Item Properties** dialog box. From there, you can review the properties of the selected item, change the item's status, and add a related comment.
Reset Current Check-list	Select this option to reset the selected checklist items' status to **Blank**. Any **Yes**, **No**, or **N/A** statuses will be removed.
Export	Select this option to export the entire Checklists grid in CSV format. You can choose to open the grid in Excel or save the file to your computer.
Save Preferences	Select this option to save any changes that you made to the column width, order, or Customize View settings of the Checklists grid.
Save Preferences for All	Select this option to change the screen preferences for all users.

LEARNING ABOUT THE NOTES TAB

Use the **Notes** tab to create a note for your workflow. A note can be a comment or reminder about any part of the workflow that needs special attention, and can be viewed by anyone who has access to WorkFlow Manager.

NOTE: Although anyone with access to WorkFlow Manager can add, view, or respond to a note, only the note's creator can edit or close the note.

The **Notes** tab includes several lists in which you can add search criteria to look for a specific note, as well as the Notes grid that lists all notes associated with the workflow. An **Actions** menu is included as well.



1	**Type list:** Select a type of note to view. Your administrator sets up the types in the **WorkFlow Configuration** area of the **Setup** module. Typical types include **All** and **General**.
2	**Author list:** Select a specific author's notes to view.
3	**Status list:** Select which status of notes you wish to view. Statuses include **All**, **Open**, and **Closed**.
4	**Search and Clear buttons:** Click Search to enter criteria to look for a specific note or click Clear to remove your search criteria.
5	**Actions menu:** Click **Actions** to view a list of options available for the **Notes** tab.
6	**Notes grid:** The Notes grid lists all notes for the selected workflow. Selected notes appear in orange.

LEARNING ABOUT THE NOTES TAB ACTIONS MENU

The **Actions** menu for the **Notes** tab contains specific actions for each item in the Notes grid. The options available from the **Actions** menu depend on your permissions, meaning that some menu options may be unavailable. Any unavailable actions appear in gray.

You can open the **Actions** menu in one of the following ways:

- Click an item in the Notes grid to select it, then click the **Actions** button.
- Select an item, then right-click it to open the **Actions** menu.

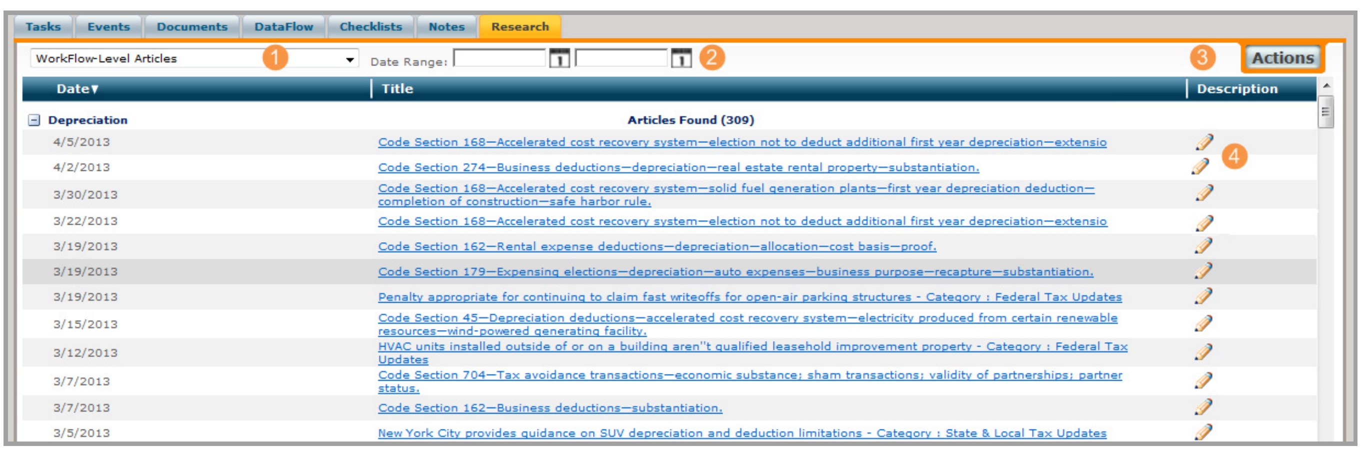
From the **Actions** menu, you can select from the following options (applicable to all workflow types):

Action Menu Option	Description
Add New Note	Select this option to add a new note.
Reply Note	Select an existing note, then select this option to add a reply.
Reply With Quote	Select an existing note, then select this option to reply with a quote.
Mark as Open	Select an existing note, then select this option to mark the note as Open.
Mark as Closed	Select an existing note, then select this option to mark the note as Closed.
Edit Note	Select an existing note, then select this option to edit the note.
Delete Note(s)	Select an existing note, then select this option to delete the note.
Note History	Select an existing note, then select this option to open the **Note History** dialog box and view all modifications.

LEARNING ABOUT THE RESEARCH TAB

On the **Research** tab, you can set up keywords and date range searches for Checkpoint articles related to your workflow. The tab includes a grid that lists each article by date and title. Hover over the pencil icon to view a summary of the article's contents, then click the corresponding link in the **Title** column to open the article in Checkpoint.

NOTE: This feature is available only to licensed Checkpoint users.



1	**Type of article view:** Select a type of article to include on your grid. Types include **WorkFlow-Level Articles** and **Folder-Level Articles**.
2	**Date Range fields:** Enter a date range to use when searching for articles. Click the calendar icons to select a date from the calendar.
3	**Actions menu:** Click **Actions** to view a list of options available for the **Research** tab.
4	**Pencil icon:** Hover over the pencil icon to view a summary of the article's contents, then click the corresponding link in the **Title** column to open the article in Checkpoint.

LEARNING ABOUT THE RESEARCH TAB ACTIONS MENU

The **Actions** menu for the **Research** tab contains specific actions for each Checkpoint article in the Research grid. The options available from the **Actions** menu depend on your permissions, meaning that some menu options may be unavailable. Any unavailable actions appear in gray.

You can open the **Actions** menu in one of the following ways:

- Click an item in the Research grid to select it, then click the **Actions** button.
- Select an item, then right-click it to open the **Actions** menu.

From the **Actions** menu, you can select from the following options (applicable to all workflow types):

Action Menu Option	Description
Manage Keywords	Select this option to open the **WorkFlow Keywords** dialog box where you can add, edit, or delete keywords.
Export	Select this option to export the entire Research grid in CSV format. You can choose to open the grid in Excel or save the file to your computer.
Save Preferences	Select this option to save any changes that you made to the column width, order, or Customize View settings of the Research grid.
Save Preferences for All	Select this option to change the screen preferences for all users.