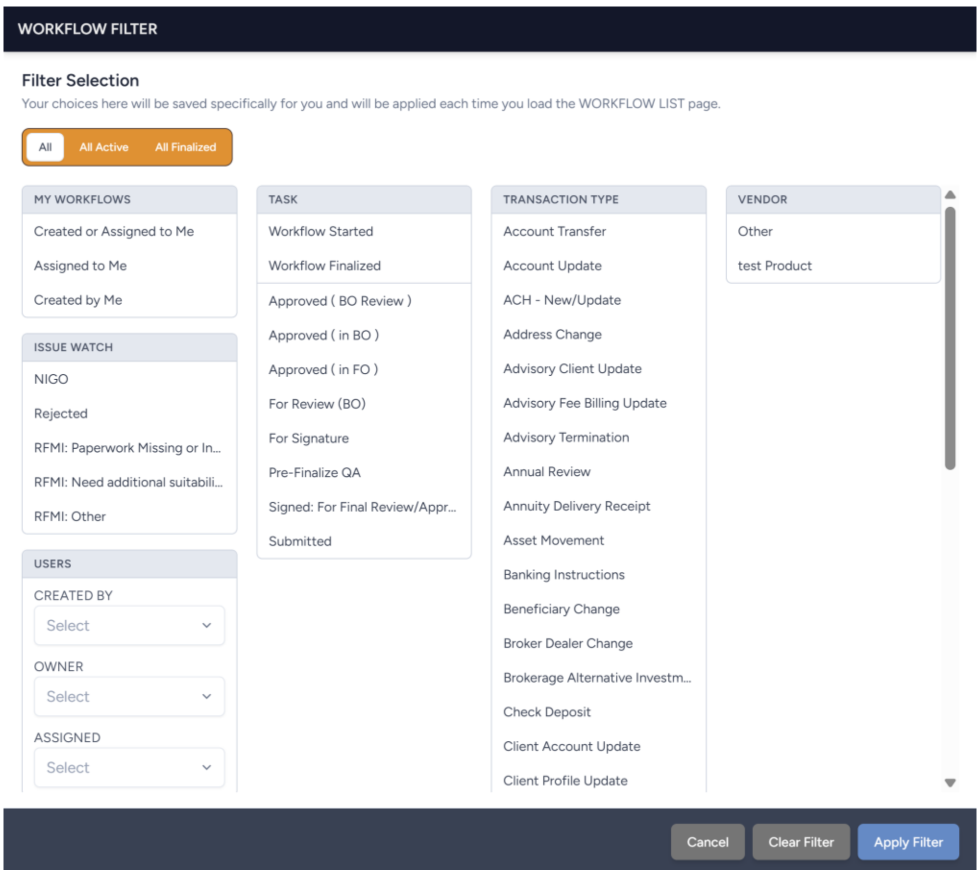
Forms Logic · New Feature

Workflow List Filter

OVERVIEW

The Workflow List Filter adds multi-category filtering to the Workflow List. Select from six filter groups — My Workflows, Issue Watch, Task, Transaction Type, Vendor, and Users — and combine selections across groups to narrow results to exactly what you're looking for. This feature is available on the new experience only — if you’re still using the legacy experience, this update does not apply to your workflow list.



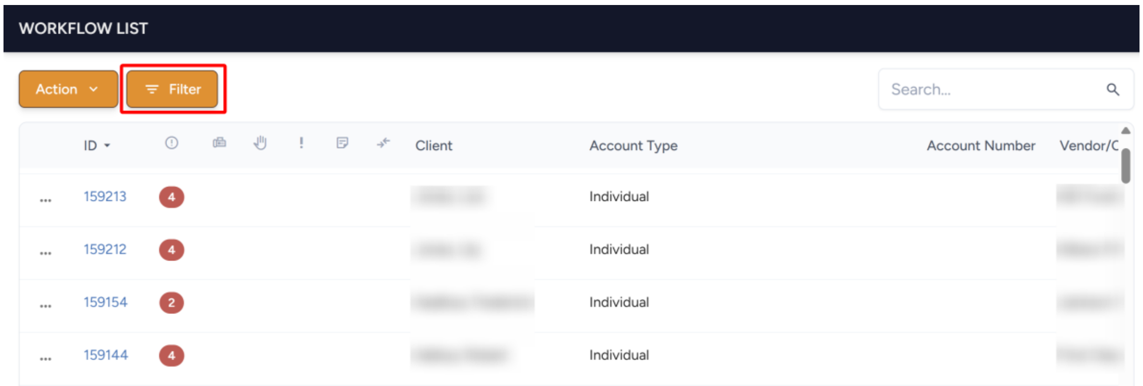
WHAT'S NEW

- Combine multiple filters at once across any group
- Narrow the list to just your work, work assigned to you, or both
- Surface workflows that need attention — NIGO, Rejected, or flagged RFMI issues
- Apply large scale filters instantly with the All / All Active / All Finalized toggles
- See at a glance how many filters are active on the Filter button

HOW TO USE THE FEATURE

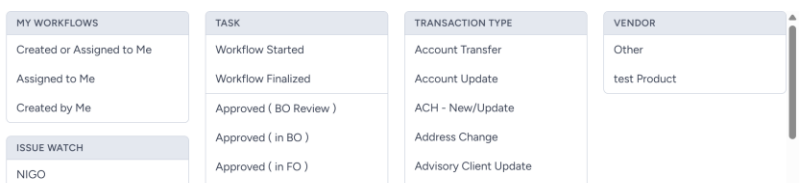
To filter the Workflow List, follow these steps:

1. Click the **Filter button** at the top left of the Workflow List.



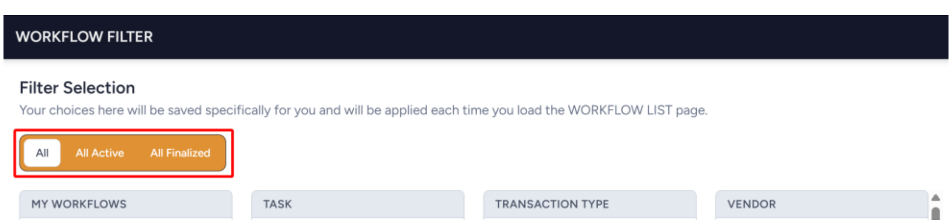
2. Once the Workflow Filter drawer opens, you can filter through two ways: **Large Scale Filters** or **Group Filters**. These two ways work independently of each other.
   - **Large Scale Filters –** the three orange buttons at the top where you can filter by All, All Active, and All Finalized

   - **Group Filters –** different groups with individual options. You can select one or more options within any group or groups to filter

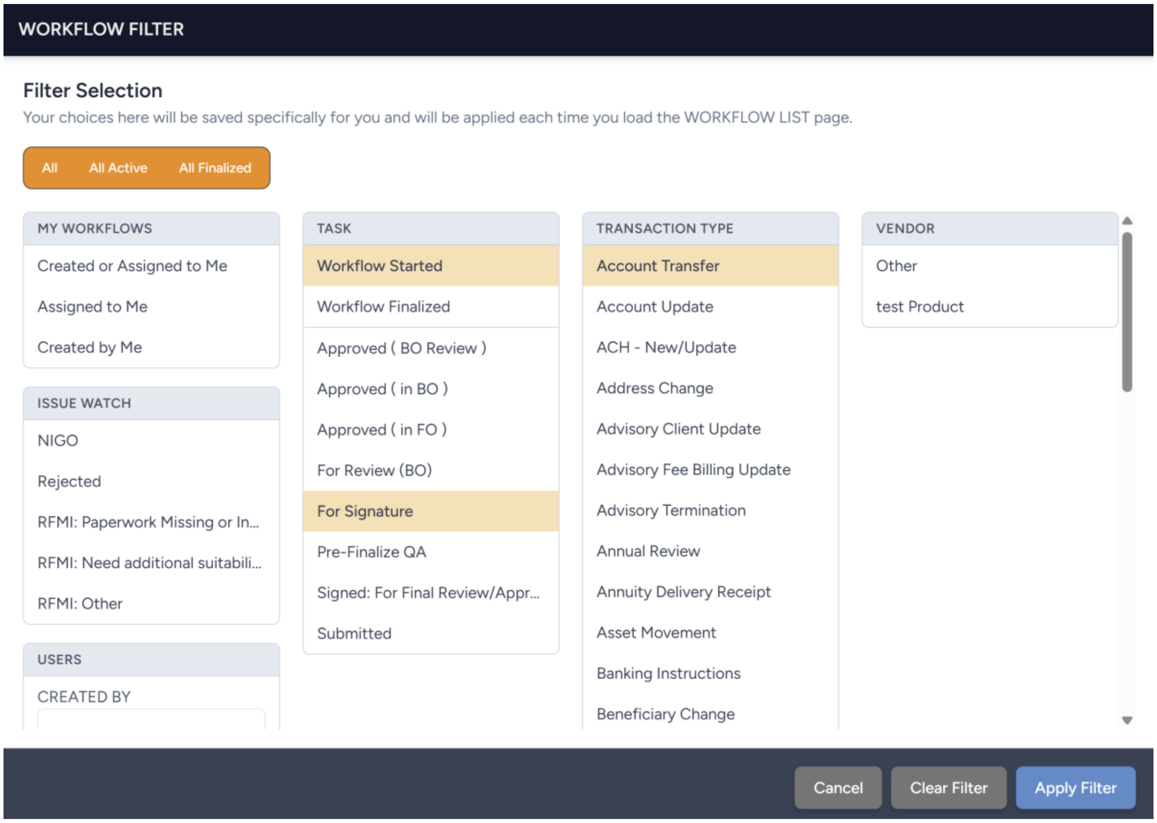


> **Note:** The Large-Scale Filters and Group Filters are mutually exclusive — selecting one clears the other.

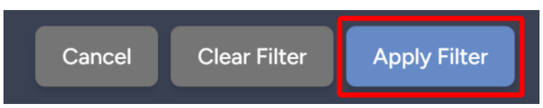
3. To filter on a large scale, select either All, All Active, or All Finalized and click the Apply Filter button at the bottom. The Workflow list will be filtered by your selection.



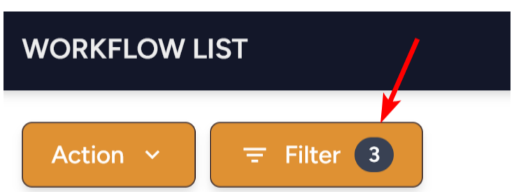
4. To filter by groups, select one or more options within any group or across multiple groups.
    - **For example**, “Workflow Started” and “For Signature” are selected under the Task group, and “Account Transfer” is selected under the Transaction Type group.



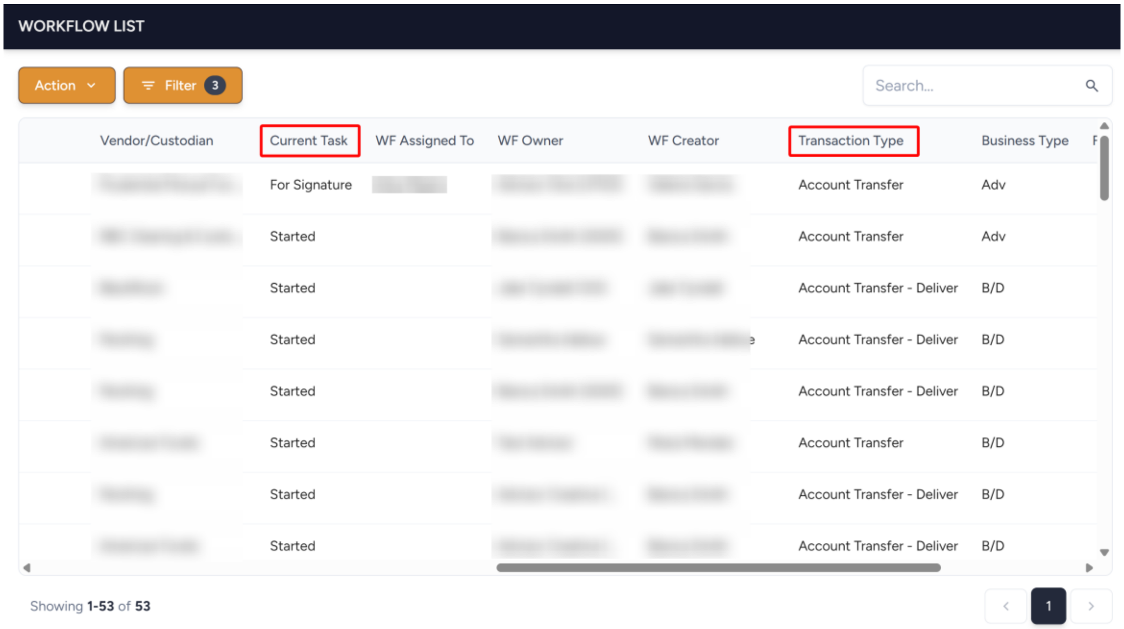
5. Click Apply Filter to update the list.



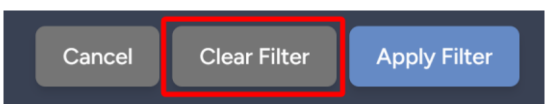
6. After the filter is applied, the Filter button will display the number of active filters.



7. The Workflow List should show workflows that meet the criteria of the applied filters.
    - As you can see, the Workflow List only shows workflows that are in Workflow Started or For Signature and have the Account Transfer transaction type.



8. Click Clear Filter at any time to remove all selections and return to the default, unfiltered view.



NOTES

- Clicking several options **within** a group will expand the search results – you are looking for results from one **OR** the other.
    - **For example**, I select "Workflow Started" and "For Signature" under the Task group. The Workflow List will show me workflows that include the Started or Finalized task.
- Clicking several options **across** groups will reduce the search results – you are looking for results that must meet the combination of one groups' criterion AND another.
    - **For example**, I select "Workflow Started" and "For Signature" under the Task group and also select "Pershing" under the Vendor group. The Workflow List will show me workflows that are either Started or Finalized and have been processed via Pershing.
- The **Task** grouping in the new filter replaces the legacy **View** dropdown.
- The Assigned option under the Users Grouping only shows workflows for people who have specifically granted you visibility into their work. If no one has, this list will appear empty.