SEARCHES, RECENT TASKS AND SAVED TASKS

Part I: Searching in Frevvo

1. Step 1 (Mandatory): Clicking the Magnifying Glass Icon

1.1. After you’ve logged into Frevvo, click on the icon that looks like a magnifying glass on the upper left-hand side of the home page near your “My Tasks.”

1.2. This will open the search form.
2. Step 2 (Mandatory): Choose the OSP Proposal & Award Acceptance Workflow

2.1. In the “Form/Flow” drop down box, choose the workflow in which you want to search. For example, if you want to find documents related to proposal submissions, you would click the “OSP Proposal & Award Acceptance Workflow.”

3. Step 3 (Mandatory): Click Submit

3.1. Click the “Submit” button at the bottom of the search form. Unless you provide additional optional search criteria (as described below), the search will take some time to run and will return all submissions that have occurred in the particular Form/Flow.

4. Step 4 (Mandatory): Click the Audit Trail Icon to View the Status

4.1. Find the submissions (or documents) you want to view. For example, in the OSP Proposal & Award Acceptance Workflow, you will be able to see the OSP Proposal Number below the Audit Trail icon.

4.2. To view the status of the particular submission you’re seeking, click on the Audit Trail icon on the right side of the submission results under the date. It looks like a rectangle with two arrows.
4.3. The first column of the Audit Trail (from left to right) will identify the “status” of the particular result you’re seeking. Please see the Frevvo User Guide for submission status definitions.

4.4. The second column of the Audit Trail (from left to right) will identify the user who assigned a task to the user in the fourth column. The names of the assigning users (second column) and the users with tasks (fourth column) may be truncated, but you can hover over the names with your mouse to see more details.

4.5. The third column of the Audit Trail provides the dates when the users in the second column assigned the tasks to the users in the fourth column.
5. **Step 5 (Optional): Choose a Start Date for Your Search**

5.1. To better refine your search and limit the number of possible search results, enter a “Start Date” in the search form. The search will only return results submitted on or after this date.

6. **Step 6 (Optional): Choose an End Date for Your Search**

6.1. To better refine your search and limit the number of possible search results, enter an “End Date” in the search form. The search will only return results submitted on or before this date.

7. **Step 7 (Optional): Choose the Submission Status**

7.1. To better refine your search and limit the number of possible search results, choose a status in the “Submission Status” drop down box. The search will only return results with the particular submission status.

7.2. Please see the [Frevvo User Guide](#) for submission status definitions.
8. Step 8 (Optional): Choose to Search for Errors Only

8.1. If you only want to search for results with errors in the system, click the check box next to the word “Yes” in the search form.

Part II: Recent Submissions & Tasks

1. Step 1 (Mandatory): Clicking the Clock Icon

1.1. After you’ve logged into Frevvo, simply click the icon that looks like a “clock” on the upper left-hand side of the home page near your “My Tasks.” The “clock” icon is between an icon that looks like an envelope and an icon that looks like a 3.5” floppy disk.

2. Step 2 (Mandatory): Click on the Audit Trail Icon

2.1. See Part I, Step 4 above for details regarding how to use the Audit Trail to find the status of recent submissions and tasks.

Part III: Saved Tasks

1. Step 1 (Mandatory): Finding Your Saved Tasks

1.1. After you’ve logged into Frevvo, you have two methods for finding your “Saved Tasks.” Saved Tasks are those tasks where you previously “saved” your work in a workflow to finish at another time. For more information above saving your tasks, see the Frevvo User Guide.

1.2. Your first option is to simply look at your “My Tasks” on the home screen when you log into Frevvo.
1.3. Your **second option** is to click on the icon that looks like a 3.5” floppy disk on the home screen. It is located near your “My Tasks” between an icon that looks like a clock and an icon that looks like a magnifying glass.

2. **Step 2 (Optional): Completing Your Tasks**

2.1. Review the list of your “My Tasks” to identify which task you’re seeking. Once you have identified it, click the ► icon under the date and above the task reference number (e.g., OSP Proposal Number for the OSP Proposal & Award Acceptance Workflow) to re-enter and complete the task.

3. **Step 3 (Optional): Click the Audit Trail Icon**

3.1. Review the list of your “My Tasks” to identify which task you’re seeking. Once you’ve identified it, see Part 1, Step 4 above for details regarding how to use the Audit Trail to see the review history for your saved tasks.