1. Search for the record you wish to attach an action or procedure to.

2. If you are creating a new document, select the ‘Record Actions’ tab in the Correspondence Entry Form and right click in the blank area and select new in the drop down menu or,

3. Right-click and select **Workflow > Action/Procedure**.

4. The **Insert Action** dialog will display:

   ![Insert Action Dialog](image)

   a. **Action** – Either enter the **Action** or **Procedure** name or use **KwikSelect** to select from the list of existing actions and procedures that may be attached to records. The down arrow will show previously selected actions.
b. **Responsible Location** - Enter a location responsible for the action or procedure (in case no default is given or if you wish to change the default). You can use KwikSelect to list internal locations. If this field is left blank, you will be prompted with the following message when you click OK:

![TRIM Context]

Would you like to be the person responsible for this Action?

Yes  No

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c. **Assign Only if Action has no Default Responsible Location** – The location to be action officer responsible will only be assigned if the action has no default set.

d. **Assign to this Action and Any Subordinate Record Action** – The location to be action officer responsible will be assigned to this and any subordinate actions (*that is: any actions within a procedure*).

5. **Scheduling of New Action. New Action Starts:**

   - **On a Specific Date** – Check this checkbox and either type the date or select it from the calendar.

   - **Before any Existing Action for this Record** – Add the action to the start of the action list. This will reschedule the due dates of any subsequent actions already attached to the record.

   - **After any Existing Actions for this Record** – Add the action to the end of the action list. The dates for the action will be modified according to the due dates of any preceding actions already attached to the record.

   - **Before the Nominated Action Below** – Add the action before the selected action. This will reschedule the due dates of the nominated actions attached to the record. Only enabled if actions are already assigned to the record.

   - **After the Nominated Action Below** – Add the action after the selected action. The dates for the action will be modified according to the due dates of the nominated actions attached to the record. Only enabled if actions are already assigned to the record.

   - **Nominated Action** – This displays the selected action for the above options. If no action or procedure is selected, then this field will not display an entry.

6. **Click OK.**