

COMPLETING WORKFLOW TASKS

Once a user completes a workflow task, the document in the workflow is automatically sent on to the next person(s) in the sequence order. Once you have completed your task in a workflow, it is critical that you mark the task as completed so the workflow can move on.

A user can complete a workflow task from four different places in PinPoint:

USING THE DOCUMENT QUICK VIEW

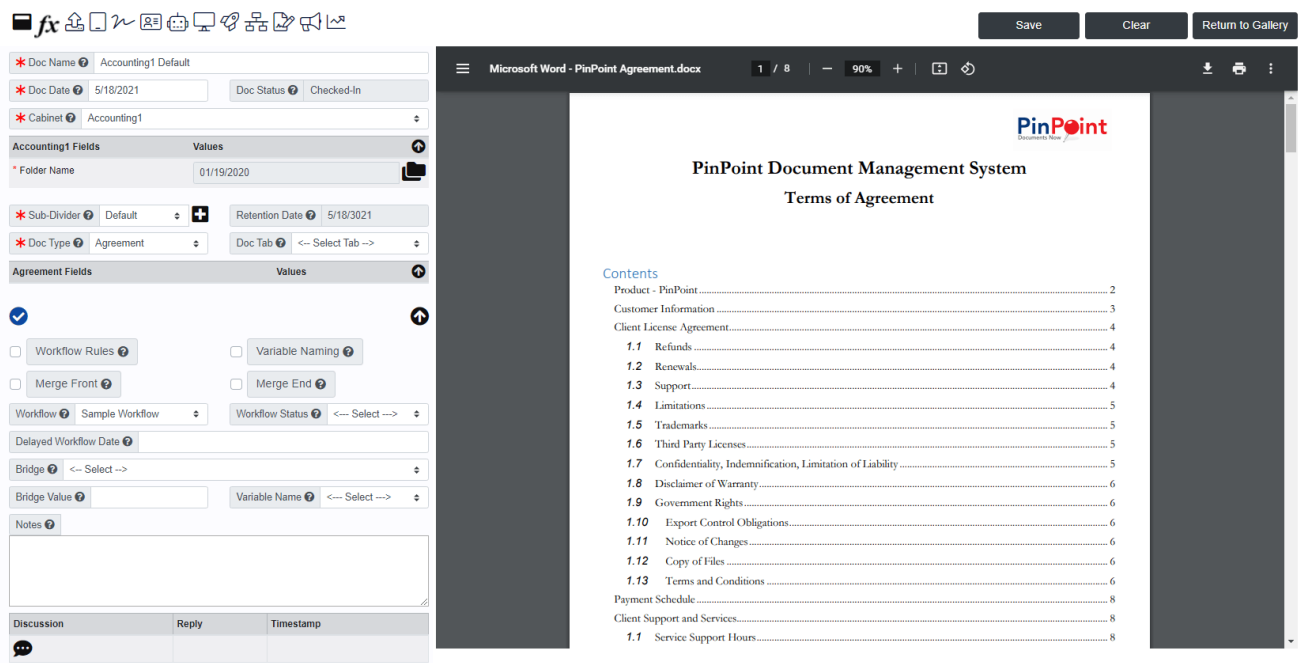
The screenshot shows a Microsoft Word document titled "PinPoint Document Management System Terms of Agreement". The document is displayed within a PinPoint interface. The top of the document features the PinPoint logo and the title "PinPoint Document Management System Terms of Agreement". Below the title is a "Contents" section with a table of contents listing various sections and their page numbers:

Contents	
Product - PinPoint	2
Customer Information	3
Client License Agreement.....	4
1.1 Refunds	4
1.2 Renewals.....	4
1.3 Support.....	4
1.4 Limitations	5
1.5 Trademarks	5
1.6 Third Party Licenses.....	5
1.7 Confidentiality, Indemnification, Limitation of Liability	5
1.8 Disclaimer of Warranty.....	6

Below the table of contents, there are two dropdown menus: "Doc Type" (set to "Agreement") and "Doc Tab" (set to "<-- Select Tab -->"). At the bottom of the document, there is a "Save" button and a blue checkmark icon.

From any page in PinPopint where documents are visible, click the DocID to open a Quick View of the document.

USING THE FILE REVIEW PAGE



You can complete your task by clicking the workflow button, located on the left side of the File Review page.

USING THE CLASSIC DASHBOARD

Workflow	Task	DocID	Doc Name	Start Date	Due Date
Sample Workflow	Check in Step	fx 19218	Email Test	06/02/2021	06/03/2021
Sample Workflow	Final Step	fx 19220	Email Test	06/09/2021	06/10/2021
Sample Workflow	Step1	fx 19192	Accounting1 Default	07/01/2021	07/02/2021

When you are using the Classic Dashboard, simply click the workflow button to complete your workflow task.

USING THE MY WORKFLOWS PAGE

Personal Private Default

Workflow Task Doc Name DocID

Cabinet Folder Search Folder Sub-Divider

Doc Type Doc Tab Content Metadata

Doc Date Status List Next

fx

Action <input type="checkbox"/>	WorkFlow	Task	DocID	Doc Date	Doc Name	Cabinet	Folder	Sub-Divider	Doc Type	1st Field	2nd Field	3rd Field	Comment	Assign Date	Due Date	Status	Status Change
<input type="checkbox"/> fx <input checked="" type="checkbox"/>	Sample Workflow	Check in Step	19218	05/28/2021	Email Test	Sample Cabinet	PinPoint	2017	Email Test					05/28/2021	06/03/2021	Red	<input type="text" value="<-- Select -->"/>
<input type="checkbox"/> fx <input checked="" type="checkbox"/>	Sample Workflow	Final Step	19220	05/28/2021	Email Test	Sample Cabinet	PinPoint	2017	Email Test					05/28/2021	06/10/2021		<input type="text" value="<-- Select -->"/>
<input type="checkbox"/> fx <input checked="" type="checkbox"/>	Sample Workflow	Step1	19192	05/18/2021	Accounting1 Default	Accounting1	01/19/2020	Default	Agenda	IE				05/28/2021	07/02/2021		<input type="text" value="<-- Select -->"/>

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When you are using the My Workflows page, you can either complete one workflow task at a time, or complete multiple workflow tasks at once.

To complete multiple workflows tasks at once, select the workflow tasks you would like to complete under the Action column, then click the Fx button located above the task list. From the Fx menu, click the button next to Complete Workflow.

If you want to complete one workflow task at a time, use the workflow button under the Actions column that is in the same row as the workflow task you want to complete.