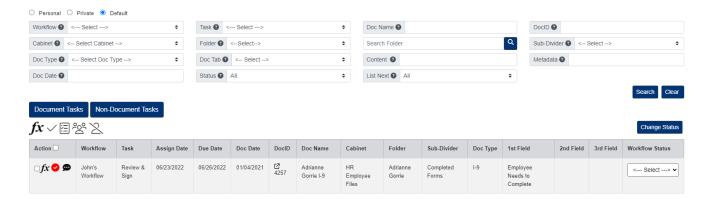
My Workflows

The My Workflow page will show all workflow tasks the user has been assigned.

Under the menu on the left-side of the screen, click the Workflows button, or go to Workflows > My Workflows within the menu.

Here, you can filter by Workflow/Task, Cabinet, Folder, Sub-Divider, Doc Type, Doc Name, Doc Date, Document Content, Document Metadata, and Assigned To.



Document View

To view a quick view of a document, click the DocID.

To launch a document to the File Review page, click the Doc Name.

Add Comments to Workflows

- 1. Click the button under the Comment column.
- 2. Enter your comment, then click the Submit

Start a Workflow Task (if required)

- 1. Under the Action column on the left, click the start button to start the task.
- 2. Enter the Start Date, then click Start.

Start Multiple Workflow Tasks (if required)

- 1. Under the Action column on the left, select all tasks you want to start.
- 2. Click the Fx button above all your assigned workflow tasks, then click the button next to Start Workflow.
- 3. Click Yes to confirm.

Complete a Workflow Task

If you do not need to view the document before you complete your task:

- 1. Click the complete task button under the Action column on the left.
- 2. Click Yes to confirm.

If you need to view the document before you complete the task:

1. Click the DocID for a quick view of the document or click the Doc Name to launch the document to the File Review page. document name to have it opened in a new tab. Both options will display the complete task button for you to complete your task.

Complete Multiple Workflow Tasks

- 1. Under the Action column on the left, select all tasks you want to complete.
- 2. Click the Fx button above all your assigned workflow tasks, then click the button next to Complete Workflow.
- 3. Click Yes to confirm.

Change the Status for Workflow Tasks

- 1. Under the Action column on the left, select the tasks you want to change the status for.
- 2. Under the Status Change column on the right, select the status you want to assign to the task.
- 3. When ready, click the Fx button above all your assigned workflow tasks on the left side of the page, then click the button next to Status Change.

Change Task

- 1. Click the Fx button next to the task you want to change.
- 2. Click the button next to Change Task.
- 3. Select the new task, then click Submit.

Add a Non-Document Workflow

- 1. Click the Add Non-Document Workflow button.
- 2. Enter the Name of the workflow, then select the Workflow.
- 3. Click the Start button.

Start a Non-Document Workflow

- 1. Under the Action column, click the start workflow button.
- 2. Enter the Start Date, then click Start.

Start Multiple Non-Document Workflows

- 1. Under the Action column on the left, select all tasks you want to start.
- 2. Click the Start Task button above all your workflow tasks.
- 3. Click Yes to confirm.

Complete a Non-Document Workflow Task

1. Under the Action column, click the complete task button.

2. Click Yes to confirm.

Complete Multiple Non-Document Workflow Tasks

- 4. Under the Action column on the left, select all tasks you want to complete.
- 5. Click the Complete Task button above all your workflow tasks.
- 6. Click Yes to confirm.

Change the Status for a Non-Document Workflow Task

- 1. Under the Action column on the left, select all tasks you want to change the status for.
- 2. Under the Status Change column on the right, select the status.
- 3. Click the Status Change button above all your workflow tasks.

Change Task for a Non-Document Workflow

- 1. Under the Workflow column, click the Change Task
- 2. Select the new task, then click Submit.