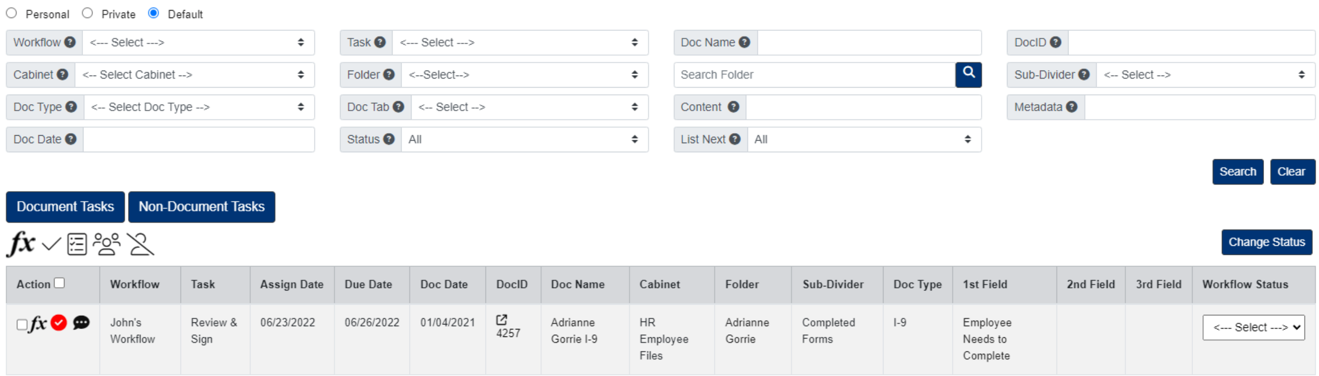
My Workflows

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.