Supervisor Workflows

If you have been assigned as a supervisor of a workflow, you will be able to monitor the progress of the workflow and reassign tasks if needed. As the supervisor, you can also add comments that the assigned users will see, as well.

From the menu on the left-side of the screen, Workflows > Supervisor Workflow.

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

WorkFlow	Task	DocID	Doc Name	Cabinet	Folder	Sub-Divider	Doc Type	1st Field	2nd Field	3rd Field	Assigned To	Assign Date	Due Date	Status	Reassign To
New Hire Process	Collect new hire paperwork, scan into PinPoint	5448	A. Gorrie Time Card	HR Employee Files	Adrianne Gorrie	Payroll and Tax Documents	Employee Time Card				bjones	05/11/2022	05/16/2022		<--- Select --- v
New Hire Process	Collect new hire paperwork, scan into PinPoint	4240	Erica Baptiste Policy DOC4240	HR Employee Files	Erica Baptiste	Hire Documents	Policy				bjones	04/13/2022	04/18/2022		<--- Select --- v
New Hire Process	Collect new hire paperwork, scan into PinPoint	4384	PinPoint - Start Here.pdf	SmartScan	SmartScan Documents	Temp	SmartScan Document				bjones	01/26/2022	01/31/2022		<--- Select --- v
New Hire Process	Collect new hire paperwork, scan into PinPoint	4341	Jamie Jones Student Transcript	Student Records	Jamie Jones	Transcripts	Student Transcript	Jones			bjones	01/05/2022	01/10/2022		<--- Select --- v
New Hire Process	Create folder in PinPoint for new hire	4383	PinPoint Trial User - Admin Exercise Guide.pdf	SmartScan	SmartScan Documents	Temp	SmartScan Document				Smith	01/04/2022	01/05/2022		<--- Select --- v

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.

Reassign Workflow Tasks

1. Under the Reassign To column on the right, select the user you want to reassign the task to.
2. When ready, click the Reassign Workflow button at the bottom right of the page.

Add Comments to Workflows

1. Click the button under the Comment column next to the workflow task you want to add a comment to.
2. Enter your comment, then click the Submit button.