

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 Doc Name DocID

Cabinet Search Cabinet Folder Search Folder Sub-Divider Search Sub-Div

Doc Type Doc Tab Content Metadata

Assigned To Doc Date Status List Next

Workflow	Task	Assign Date	Due Date	DocID	Doc Name	Cabinet	Folder	Sub-Divider	Doc Type	1st Field	2nd Field	3rd Field	Assigned To	Reassign To	Status
PC	Review	03/16/2021	03/17/2021	2810	SSL Labs pdf	Employees	Jill Jones	Other	Invoice				hlong	<input type="text" value="<-- Select -->"/>	
PC	Review	03/23/2021	03/24/2021	1703	Test1_NoCover.pdf	Employees	Jill Jones	Other	Invoice				epeaseman	<input type="text" value="<-- Select -->"/>	
PC	Review	04/06/2021	04/07/2021	2812	Vendors ABC Company Invoices ABC Company	Employees	Jill Jones	Other	Invoice	45791	02/01/2023	500.00	epeaseman	<input type="text" value="<-- Select -->"/>	
PC	Review	04/06/2021	04/07/2021	2813	Vendors ABC Company Invoices ABC Company	Employees	Jill Jones	Other	Invoice	45690	03/01/2023	500.00	epeaseman	<input type="text" value="<-- Select -->"/>	

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.

Add Comments to Workflows

1. Under the DocID column, click the Comment button for the workflow task you want to add a comment to.
2. In the pop-up window that appears, enter your comment, then click the Submit button.