Assignment History

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Every doc filed out of Unassigned leaves a record — search it by doc, by transaction, or by the person who did the filing.

Introduction

An agent swears she emailed the disclosure in, and she has the acknowledgement to prove it. It isn't on the transaction where she expected it. Now two people are hunting for one document in two different places.

Almost every time, the doc arrived fine and then somebody filed it. Assignment History is the log of that filing. When a doc leaves the *Unassigned Docs* queue it writes one line here: which transaction it went onto, who put it there, and when. That's the assignment event by itself, kept apart from everything that happens to a doc afterwards, so you get a short, fast log rather than a full audit trail to read through.

One look usually ends the conversation. The common answer is that the doc went onto the transaction directly above or below the right one, and seeing that is most of the work. From there your trail carries on where the doc now lives: the transaction's own history holds what happened after the filing, including who reviewed it, who changed it, and who took it off again.

How It Works

One log, searchable, covering the moment a doc left the queue.

What It Records

Docs assigned out of Unassigned: the doc, the transaction it went to, and the person who filed it. It's the assignment event specifically — not everything that ever happened to the doc.

Where It Lives

On the left menu of the *Unassigned* page, alongside the deleted docs bin. Newest first by default.

Search It

You can search the log by doc, by transaction, and by the person who did the assigning, and narrow it to a date range. Accounts running more than one office can widen the view to cover the whole company rather than a single location.

Who Can See It

The full company-wide log is a master admin view. Someone without that reach may see a narrower slice or none of it — which is worth knowing before you ask a colleague to check something for you.

What It Doesn't Cover

Deleted docs aren't assignments, so they aren't here — the deleted docs bin holds those. And once a doc is on a

transaction, the transaction's own history records everything that happens next, and that is the fuller audit trail: uploads, assignments, deletions, reviews, all searchable by activity type.

Open Assignment History

The log of everything filed out of the queue, two clicks from the top menu.

Who Can Do This: Master admins see the full company-wide log; other roles may see a narrower view or none.

To open Assignment History:

1. Click [Unassigned] from the top menu.
2. Click [Assignment History] from the left menu.

The log opens newest first, so the most recent assignments are at the top.

Trace Where a Doc Was Assigned

Find out which transaction a doc ended up on — the fastest answer to "where did it go?"

Who Can Do This: Master admins see the full company-wide log; other roles may see a narrower view or none.

To trace where a doc was assigned:

1. Click [Unassigned] from the top menu.
2. Click [Assignment History] from the left menu.
3. Search for the doc by name, or narrow the log to the date range it would have been filed in.
4. Read the transaction it was assigned to, and who filed it.

If it's listed, open that transaction — a doc reported missing has usually been filed somewhere unexpected. If it isn't listed at all, check the deleted docs bin next.

When the Log Comes Up Empty

An assignment that never happened doesn't get logged, which leaves one other way the doc could have left the queue. Somebody deleted it, and that has its own page.

Delete a doc and it doesn't vanish. It lands in *Deleted Docs*, where it stays for a year with a record of who removed it and when.

See Deleted Docs

Frequently Asked Questions

How far back does Assignment History go?

It's built for recent activity, not long-term archive. Older assignments may fall outside the view. If you need a

window the page won't reach, email us the doc name and the dates and we'll pull the record.

Who can see Assignment History?

The full company-wide log is a master admin view. Other roles may see a narrower slice or none at all — so check who's looking before concluding a doc isn't there.

Can I search it by the person who assigned the doc?

Yes. The log can be searched by doc, by transaction, and by the person who did the assigning, and narrowed to a date range.

Does it show deleted docs?

No — deleting isn't assigning. The deleted docs bin on the *Unassigned* page holds those, along with who removed each one and when.

What's the difference between Assignment History and a transaction's history?

This log covers the moment a doc left the queue; the transaction covers everything after. A transaction's own history is the fuller audit trail — uploads, assignments, deletions and reviews, searchable by activity type.

A doc isn't in Assignment History at all. What does that mean?

It was never assigned. Check the deleted docs bin next. If it isn't there either, the doc likely never reached Pipeline — turn on Doc Acknowledgement Emails and resend to confirm.