

PowerDMS®

Review and Approval Workflows: What's the Difference?

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This Sessions Assume You Are Already Familiar with...

- Uploading a new document
- Document lifecycle (creating a new draft, publishing, archiving)
- Using Track Changes in Microsoft Word
- Group security permissions



After This Session, You Will Be Able To:

- Define a review workflow and an approval workflow
- Identify the difference between the two workflow types and when to use them
- Build a workflow template
- Launch review and approval workflows
- Leverage best practices to maximize the potential of workflows in your site



Review Workflow

- Document starts and stays in a **Published** state
- Allows participants to EVALUATE the accuracy of the document being reviewed
- Can be triggered by automation
 - Template must be used
- Can be manually initiated but less likely use case



Approval Workflow

- Document starts and stays in a **Draft** state
- Allows participants to collaborate, plan and apply changes needed on the document
- Manually triggered by an administrator
- Can use a template or establish Ad-Hoc structure for participants needed for collaboration



Workflow Template Tips

- Follow Best Practice and ALWAYS use Groups in your workflow steps
- Avoid redundant workflow structures if at all possible
- Remember that workflow structures can include 1 step with 1 group that only has 1 user as its member (helpful with Review workflows).



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PowerDMS University Resources (Administrators Only)

[PowerDMS site](#) > [Help](#) > [PowerDMS University](#)

- University Live
 - Document Workflows
- Self-Paced
 - Using Document Workflows



Success Community Resources (All Users)

[PowerDMS site](#) > [Help](#) > [Success Community](#)

- [Best Practices in Creating Workflows](#)
- [Creating a Review Workflow](#)
- [Creating an Approval Workflow](#)
- [Participating in a Workflow](#)
- [Notifications from Workflows](#)
- [Creating Simple Workflow Templates](#)
- [Workflow Response Types](#)

