PowerDMS

by NEOGOV

Uploading Documents and Using Workflows

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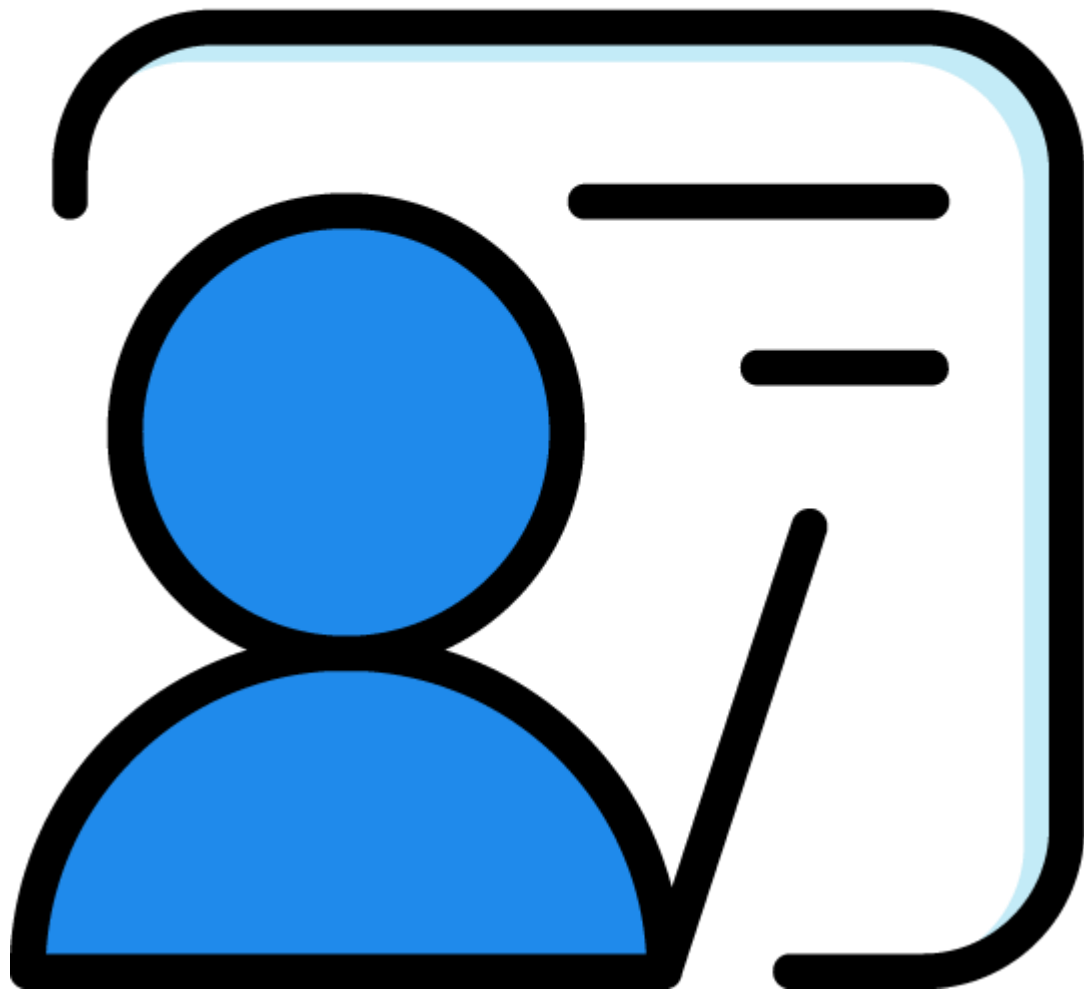
A Few Things to Note:

- This session is being recorded.

- The recording will be automatically Emailed to all registrants of this session, as soon as it becomes available.

- You can and should download a copy of this presentation from the Handouts section of the GoToWebinar sidebar.

- You can type in your questions any time within the questions field of GoToWebinar

After This Session, You Will Be Able To:

- Recall the steps to upload a document in PowerDMS.

- Recite PowerDMS Best Practices for Folder, Document and Workflows.

- Set up a Review Workflow on a document in PowerDMS.

- Launch and approval workflow in PowerDMS.

Review Workflows

Allows evaluators to review the policy to determine its validity and whether changes should be made.

- ✓ Assist with review compliance (I.E, annual reviews for accreditation proofs)

- ✓ Assist with ensuring documents are distributed annually (I.E., annual review to verify it is time to update the policy and collect annual signatures)

- ✓ Assist with Contracts (I.E., the review workflow will launch to review the current contract and see if a new one needs to be made)

- ✓ Allows you to ensure your policies and procedures are up-to-date and comply with your current needs

Approval Workflows

Allows collaborators to make comments and revise the policy to ensure it meets the organizational needs.

✓ Allows visibility to changes made (I.E, can use track changes in word and/or use the built-in comparison tool feature)

✓ Ensure proper version control (I.E., the draft version of the policy will replace the current published version)

✓ Allows you to involve multiple persons/groups from several locations to work together on document updates

✓ Allows you to ensure your policies and procedures are up-to-date and comply with your current needs

Document and Workflow Resources

Documents

[Uploading Documents](#)

[Document Best Practices](#)

Review Workflow

[Creating a Review Workflow](#)

[Review Vs Approval Workflow](#)

[Best Practices in Creating Workflows](#)

Approval Workflow

[Creating an Approval Workflow](#)

[Collaboration on a Document](#)

You Should Now Be Able To:

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- Launch an approval workflow in PowerDMS.