Power DMS by NEOGOV

Advanced Workflow Templates

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Objectives:

- Describe the benefit of advanced workflow templates.
- Create advanced workflow templates.
- Attach advanced workflow to an approval workflow.
- Attach advanced workflow to a course.
- Attach advanced workflow to Training Request.



Three Main Considerations for Advanced Workflows







What is the total number of approval steps?

It's a best practice to set up the default number of steps you want to have in the workflow first. Which response type should each approval step require?

Ensure each step has the response type you require for your approval.

Which positions should I map?

Mapping tells the workflow here you want requests to go on each step in the approval.



Workflow Response Types

First Response

The first responder can approve the request for it to move forward to the next step.

Dynamic First Response

The first responder can approve the request for it to move forward to the next step. Upon approval they can redirect to another individual or continue to the next step.

All Response

All users at this step must approve before the workflow step is satisfied and the workflow continues.

Simple Vote

Users at this step are prompted to give a thumbs up or thumbs down. No approval is required.

Power**DMS**

Attach template to a Workflow

- Navigate to the document's management tabs>revision.
- Add workflow due date (if applicable) and save.
- Click Start New next to workflow. Attach template and begin!

726 - New -	Help	Welcome, Britta
DMS A	ccreditation / SOPs MIB Policy	View Document
General	Revisions Review Standards Assignments Signatures Activity Security	
Draft (1)	Published (1) Archived (18)	
	This revision is currently in draft	
	Revision Date: 11/22/2022	
	Comments:	
	Test Attached:	
	Signatures Due: After V 7 days 🛛 Workflow Due Date:	
	Signatures: 0 Discussion: 0	
	Current File: 🖹 11/22/2022 2:43 PM - Brittany Van Etten 🛛 [Edit on Desktop] [Add New File] [Convert to HTML] 🛡 Show File History	
	Workflow: Not Started [Start New]	
	Save	

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Attach template to a Training Request

- Hover over Welcome, Your Name
- Select Administration Menu>Training.
- Apply appropriate settings and Save.



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Attach template to a Course

- Find the course in the PowerDMS blue side bar. Hover over the three-dots and select manage.
- From the General tab, use the drop-down to select the approval workflow you intend to use. This will engage the workflow as soon as the user enrolls.

	📕 101 Fire - Day One Firearm Training AM
Documents Standards Manuals	General Content Fees Seats Security
Assessments E Certificates	Course Number 101 Fire Credit Hours:
Courses Annual Training	Course Name: Day One Firearm Training AM
101 Fire - Day One Firear ATA 101 - Firearms	Description:
BCM3-01 - Hero Product CHM 2024 - Chemistry	
CPR 101 - CPR/AED EME2053 - Ethics Training	
PHY2023 - Physics	Approval Workflow [Advanced Workflow Trail V] Course Type: [Amual Training V
External Licensing Forcible Stopping	Tagged With:
Furnar Resources SOP Compliance	Certificate(s):
Surveys	
	Save



Scenario 1:

You are a new PowerDMS administrator and created some courses for your site that will need approval before they can begin the course content. How can you make this happen?





Scenario 1 Resolution:

Navigate to the management tabs of the course you want to have approved before the learners can begin the course content. In the general tab, add the workflow template you want leveraged.





Scenario 2:

Your organization offers several conferences each year and you want to keep track of the expenses for the conference, as well as have each conference request routed to the appropriate supervisors to approve their requests. What feature in PowerDMS can you leverage to make this happen?





Scenario 2 Resolution:

Enable training requests on your site and attach the workflow template (if applicable).





Scenario 3:

Your organization have several departments. The order of the workflow is dependent on the department. IE If a human resource specialist initiates the workflow, it should route to the Human resource manager but when someone from IT initiates the workflow it should instead route to their immediate manager. What is the best way to make this happen?





Scenario 3 Resolution:

Create an advanced workflow template that routes each department so that when they start the workflow, it automatically routes to the next immediate member of the department.





You should now be able to:

- Describe the benefit of advanced workflow templates.
- Create advanced workflows templates.
- Attach advanced workflow to an approval or review workflow.
- Attach advanced workflow to a course.
- Attach advanced workflow to Training Request.



Support Resources

PowerDMS Support Team: 1-888-959-5158 or support@powerdms.com

Success Community Articles:

- <u>Creating Advanced Workflow Templates</u>
- <u>Allowing Training Requests</u>
- Workflow Response Types
- Advanced Workflow Templates and Training Requests



