



**PowerDMS**  
by NEOGOV

# Advanced Workflow Templates

Facilitator: Brittany Van Etten  
[trainingteam@powerdms.com](mailto:trainingteam@powerdms.com)

# Brittany Van Etten

Training Specialist I



# 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



# 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

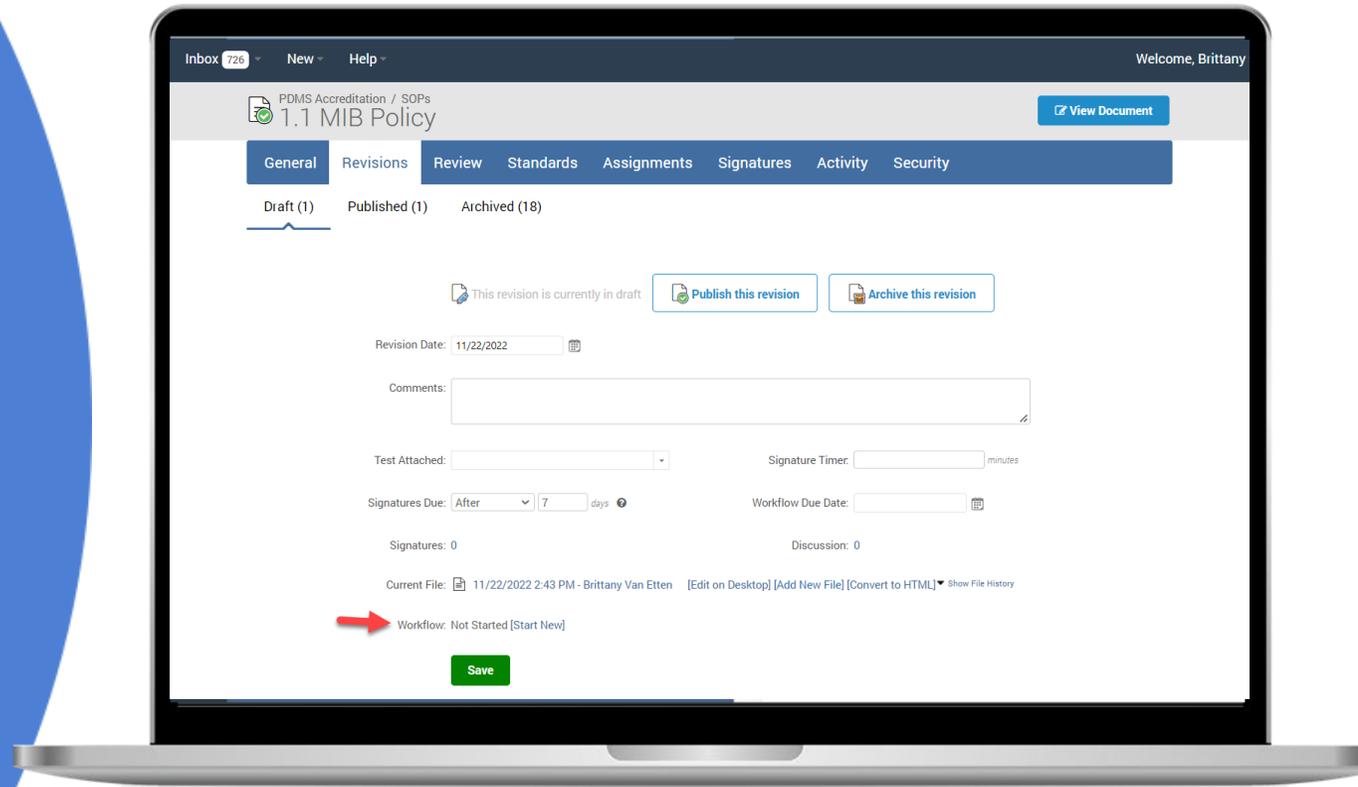
Users at this step are prompted to give a thumbs up or thumbs down. No approval is required.



# PowerDMS

## Attach template to a Workflow

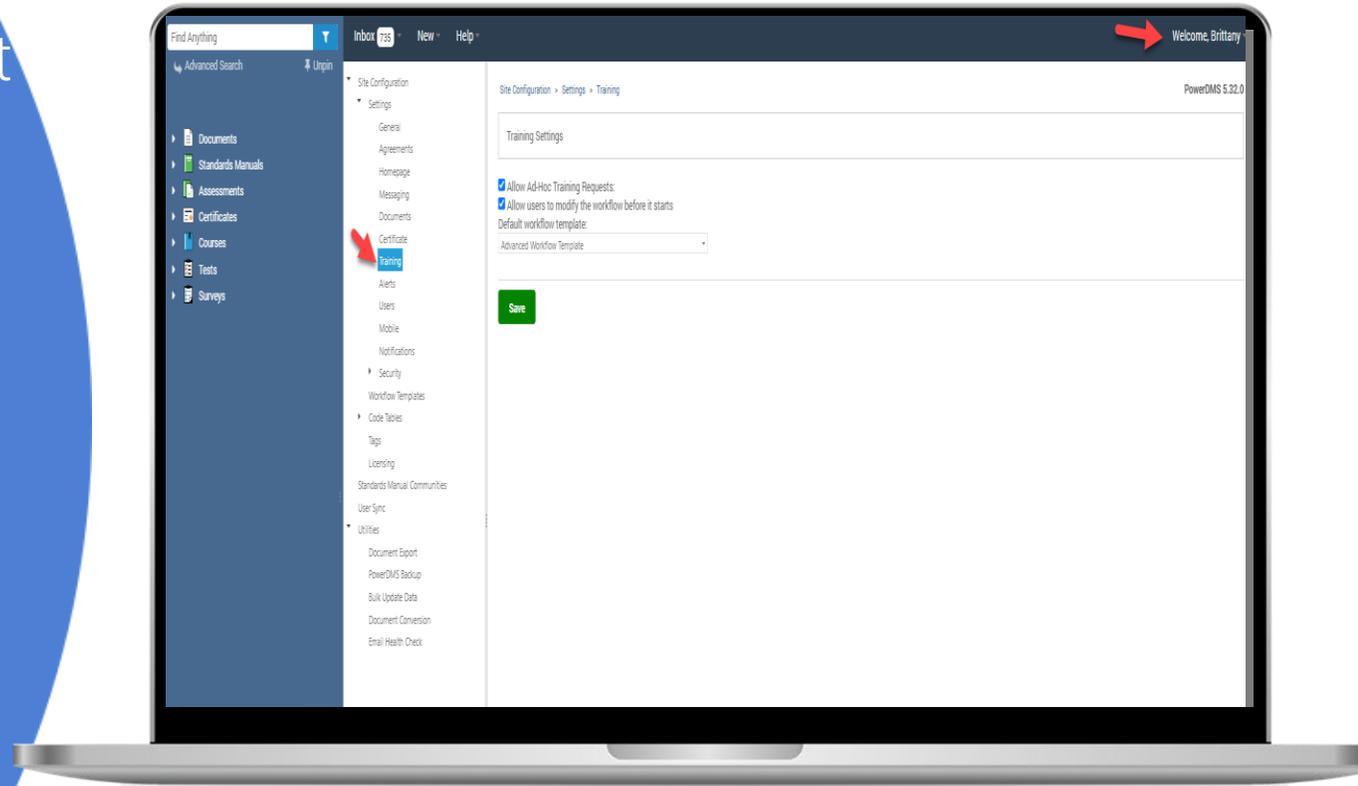
- Navigate to the document's management tabs>revision.
- Add workflow due date (if applicable) and save.
- Click Start New next to workflow. Attach template and begin!



# PowerDMS

## Attach template to a Training Request

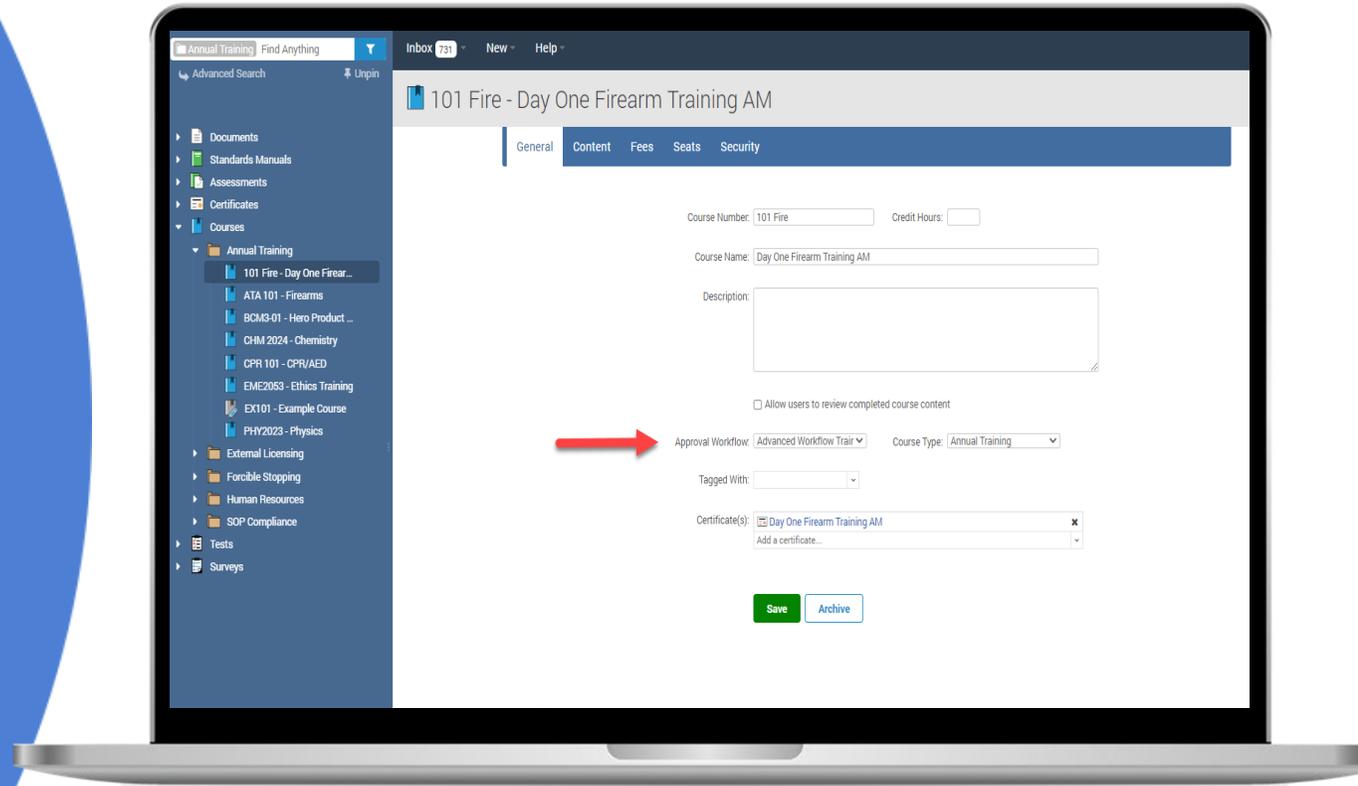
- Hover over Welcome, Your Name
- Select Administration Menu>Training.
- Apply appropriate settings and Save.



# PowerDMS

## 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.



# 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](mailto:support@powerdms.com)

## Success Community Articles:

- [Creating Advanced Workflow Templates](#)
- [Allowing Training Requests](#)
- [Workflow Response Types](#)
- [Advanced Workflow Templates and Training Requests](#)





**Questions?**