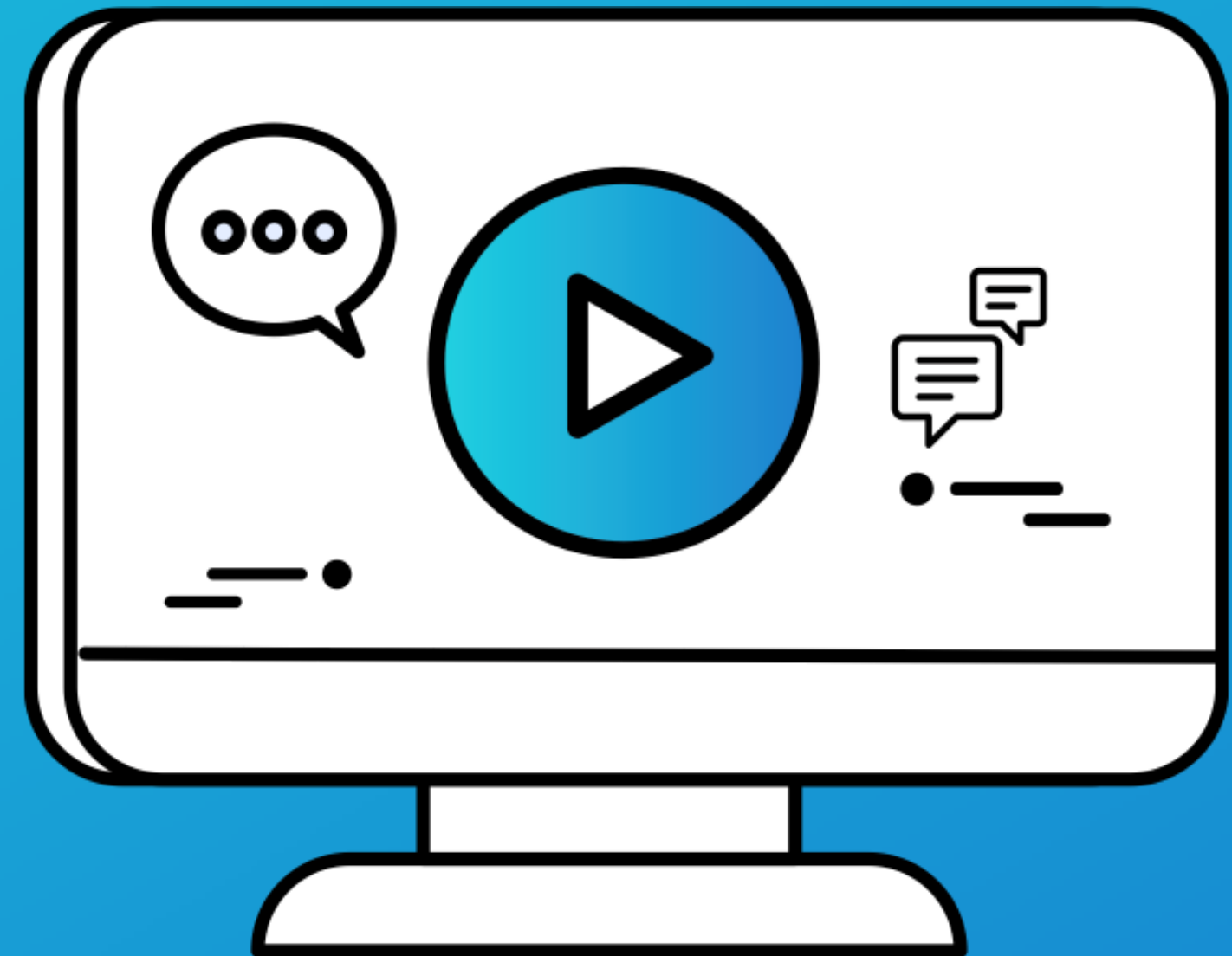*Welcome*

Workflow Workarounds: Finding a Solution

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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.

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

This Session Assumes:

- You are already familiar with standard security definitions.

- You know how to create groups and manage security for those groups.

- You know how to upload and manage documents.

- You know how to create workflow templates

After This Session, You Will Be Able To:

- Work through common administrative scenarios

- Debunk common misconceptions about:

  ➢ Groups

  ➢ Workflows

  ➢ How the two correlate

Scenario 1

Alexa: Remind Me to Revise My Documents

Our policy administrator, Morgan, is just getting the team familiar with using PowerDMS for their policy revisions.

She wants to automate PowerDMS to initiate an approval workflow so she can start the annual revision process, but she cannot figure out how to do that...

Any ideas?

Scenario 1 – Finding A Solution

Alexa: Remind Me to Revise My Documents

Leverage the Review Workflow automation functionality.

Morgan can establish a workflow template, that is assigned just to her as a Review Workflow.

This can set the automation to remind her to start the process of revising the document annually.

Scenario 2

To Give or Not To Give: Administrative Access

Morgan has trained a few trusted, departmental Supervisor on how to use the pre-established workflow templates she created with them for the approval process, but while she is at a conference, she receives an email from a Supervisor asking for access to the Administration menu to create a new template.

She is nervous to provide access to the full Admin menu, but she want to make sure they can continue with their document revisions on schedule.

Any ideas?

Scenario 2 – Finding A Solution

To Give or Not To Give: Administrative Access

Leverage the create template option from within the approval workflow launch view.

Supervisor will need to have:

➢ Edit rights to the document requiring revision.

➢ Audit Permissions to the group(s) needed to participate in the workflow

Scenario 3

The Wearer of Many Hats

Morgan has always worked closely with the Accreditation Manager, who is currently out on extended maternity leave. Morgan needs to ensure that she keeps up with the documents and workflows that are already in progress but doesn't want to have to restart all of the workflows.

Any ideas?

Scenario 3 – Finding A Solution

The Wearer of Many Hats

Leverage the already existing group associated with the workflow.

Whether on the template or in an active workflow, including the relevant personnel in an "off-title" group may achieve to oversight needed to properly address the workflows.

**** Will require secondary interaction to clean up/update the group membership after the oversight is addressed.

Myths Debunked…

Groups, Workflows and Everything in Between…

× Use of a group requires you to include multiple users at a time.

> ➤ Groups can hold a single user. This may better support the workflow mobility and maintain best practice.

× You are required to give access to the Administration Menu to create workflow templates

> ➤ Ensuring the administrators who need if have the security permissions required, will support them in creating any new templates they may need.

× Group membership within your site, should only correlate to a specific job title.

> ➤ Workflow needs usually help administrators identify that pertinent collaborators need to be further defined based on role/responsibility.

You Should Now Be Able To:

- Work through common administrative scenarios

- Debunk common misconceptions about:

  ➢ Groups

  ➢ Workflows

  ➢ How the two correlate

Q&A

PowerDMS University Resources (Administrators Only)

PowerDMS site > Help > PowerDMS University

✓ University Live: Document Workflows (Live Instructor Led Class)

✓ Using PowerDMS Document Workflows (Self-Paced E-Learning)