

# PowerDMS<sup>®</sup>

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by NEOGOV

## PowerDMS Workflows Tips and Tricks

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Hello



**Katie Sands**

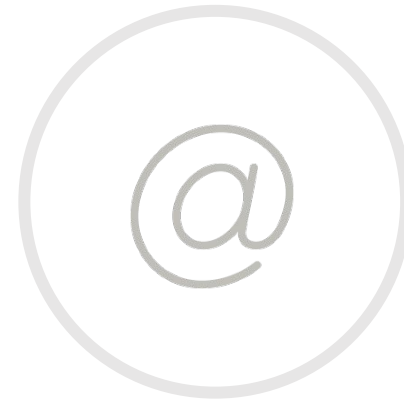
Training Specialist

PowerDMS Certified Professional

# Some Quick Notes



**This session is being recorded.**



**The recording will be emailed to you automatically.**



**You can (and should!) download the slide deck.**

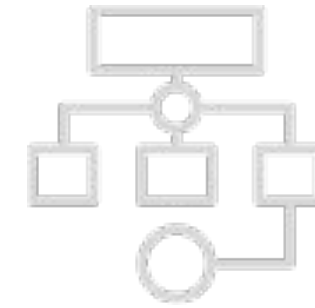


**You can type in questions at any time in the interface.**

# Overview

- **What types of workflows are there?**
- **How can people respond in their step?**
- **Can workflows be automated?**
- **What do I do when \_\_\_\_\_ happens in the workflow?**

# What is a **Workflow**?

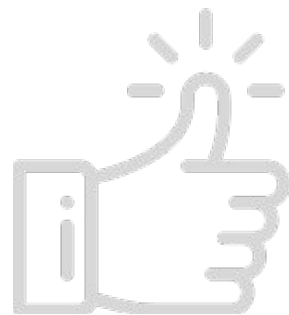


Workflows are a well-used feature of PowerDMS used in conjunction with document reviews, document approvals, and training requests. They provide a way for users to collaborate on and discuss items in the order that the workflow creator desires.

# Types of Workflows

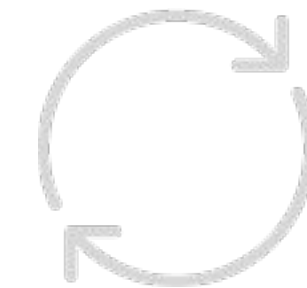
## Approval

We use Approval Workflows on documents currently in **draft** form that may require another set of eyes or a manager's review and/or approval before the document is published.



## Review

Review workflows provide you and your team with automated reminders to ensure **published** policies and other documents are reviewed regularly.



# Response Types

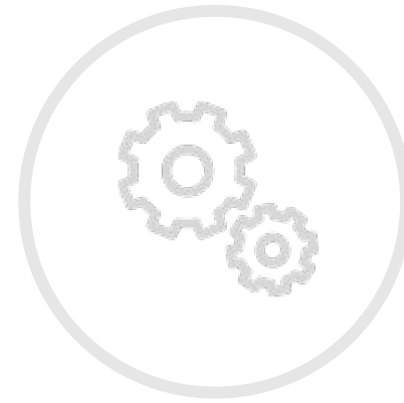


## First Response

First person to act will complete the step

Will close workflow if final step

Denial will close workflow at any point

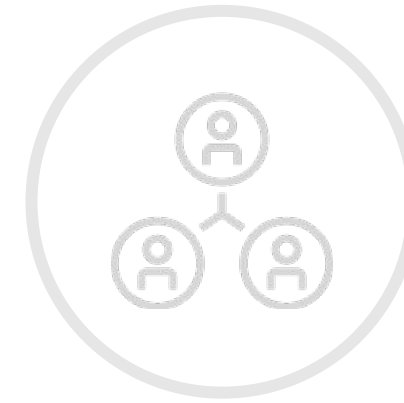


## Dynamic First Response

Step can be pivoted to another user

Additional DFS steps can be created after

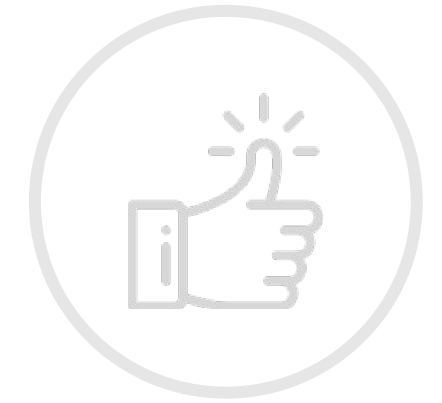
Denial will close workflow



## All Response

Step completed after every user assigned in step has answered

A single denial will close the workflow



## Simple Vote

Users can vote until the following step is completed

*Not recommended for final step*

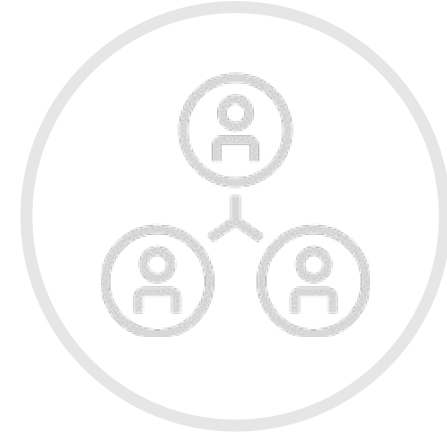
Will not affect workflow positively or negatively

# Approval Workflows



## Use “Track Changes”

Use Track Changes feature in MS Word  
Enable this before launching your workflow



## Allow Users to Edit Draft

More efficient to have everyone make changes and Word then tracking them  
*INSTEAD OF*  
Users telling you the changes, which you have to collect and implement



## Log Review Lifecycle Event

Used when capturing an event done out of a pre-set cycle  
Ensures next review doesn't come too soon after this mid-cycle review

# Review Workflows

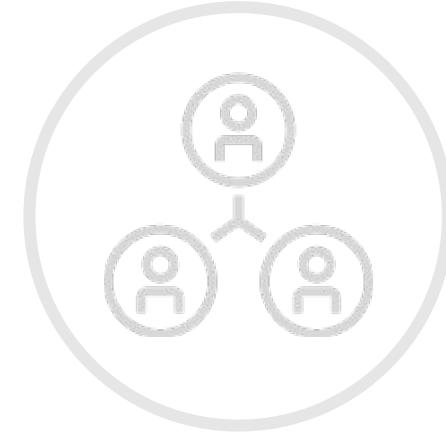


## Pick a Timeframe

Choose a specific date to start recurrence

*OR*

Recur based on the Last Reviewed Date



## Choose a Template

Pick one that is already created and saved

*OR*

Create a new one from this page



## Confirm Last Review

If using the “Last Reviewed Date” option,  
make sure that a date is recorded and that  
“Next Review Date” is populated  
appropriately.



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# Workflow Templates

- ◇ Simple or Advanced workflows.
- ◇ Can be used for multiple workflows, then customized further on each use.
- ◇ Required to automate Review workflows.
- ◇ Best Practice? Add Groups, not Users!

Workflow Templates

Workflow Template Information

Name: Revision

Start ↓ New steps may be added at the beginning of the workflow

Step 1 ↓	Policy Writers x	Simple Vote	⊖
Step 2 ↓	Leadership x	First Response	⊖
Step 3 ↓	Decision Makers x	First Response	⊖

⊕ Add Another Step   ⊕ Help With Workflow Steps

Finish



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## Starting a Workflow

- ◇ Only make changes on a Draft, not Published document.
- ◇ It is Best Practice to allow users to edit the draft.
- ◇ Set Track Changes in Word before starting Workflow.

## Name the Workflow

- ◇ Defaults to Approval or Review.
- ◇ Change it to provide clarity for participants, i.e. “Annual Policy Review” or “Revise and Approve”.

## Response Reminders

- ◇ Dynamic First Response allows pivoting of Workflow to other users not in the Workflow.
- ◇ Simple Vote step also opens next step; if next step approves, Simple Vote step ends.

# What Happens When....

- the workflow is denied by a user?

Master Admin/workflow starter can request re-evaluation from denier after making changes or adding context to note.

- a user hasn't responded?

You can “nudge” a user through the Workflow panel to send them a message, which includes a link to the document.

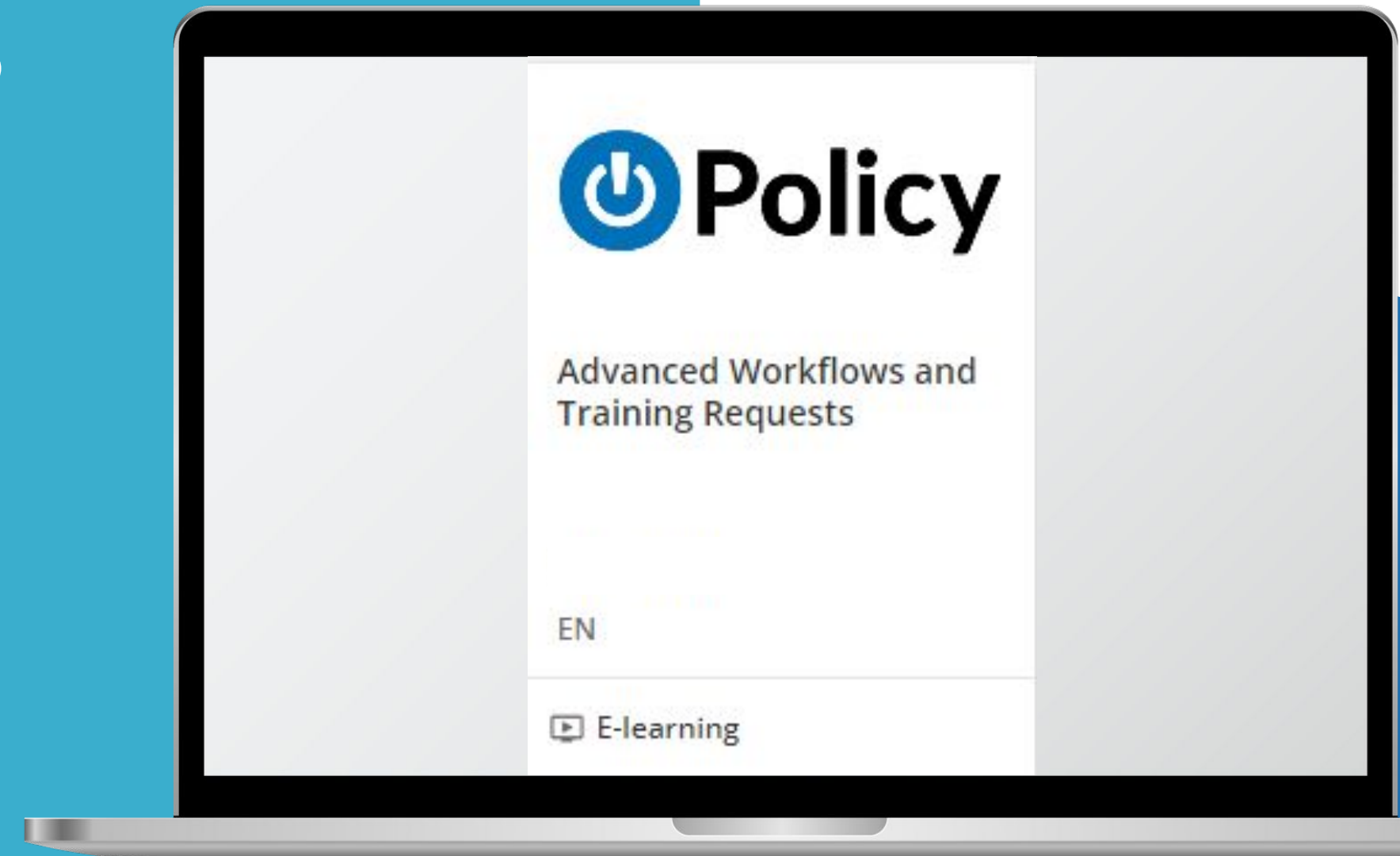
- I change my mind with my answer?

If the workflow is still open, you can get back to it through Document History and change your vote.

# Advanced Workflows

How do I set a workflow to go in multiple directions?

For more about Advanced Workflows and using them with Training Requests, check out our self-paced e-Learning course in PowerDMS University, [Advanced Workflows and Training Requests](#).



# Q&A



THANK YOU

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