

PowerDMS[®]

Document Management **Simplified**

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Creating Workflows in PowerDMS

How to use PowerDMS workflows for revision and collaboration

PowerDMS

Creating Workflows

OBJECTIVE

In this session you will learn how to create a review and approval workflow on a PowerDMS document.

Creating Workflows

We are here to help. PowerDMS has many resources available to you.

- [Getting Started with PowerDMS](#)
- [Webinar Schedule](#)
- [PowerDMS University](#)

Creating Workflows

PowerDMS Success Community

- Video Tutorials
- [Recorded Webinars](#)
- Q&A
- How-To
- Best Practices
- [CALEA Specific Resources](#)
- Forum

Creating Workflows

Conference Learning Opportunities

- Training sessions
- SupportLIVE one on one sessions

Creating Workflows

After this session, users will begin to understand how to:

1. Create a workflow
2. Utilize a review workflow vs. an approval workflow
3. Distinguish between workflow response types
4. Add a comment in a workflow
5. Edit a document within a workflow

Creating Workflows

6. Advance to the next step
7. Change a response after approval/denial of workflow

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Create a workflow

PowerDMS Success Community Resources:

- [Creating a Review Workflow How-To](#)
- [Creating an Approval Workflow How-To](#)
- [Creating a Workflow Video](#)
- [Best Practices in Creating Workflows How-To](#)

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Begin to understand workflow response types

PowerDMS Success Community Resources:

- [Workflow Response Types](#) How-To
- [In workflows, what is “Simple Vote.” and how is it used?](#)
[Q&A](#)

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Related resources for workflow participants:

PowerDMS Success Community Resources:

- [Collaborating on a Document](#) How-To
- [Participating in a Workflow](#) Video
- [In a document approval workflow, do I have to give participants the right to edit my document?](#) Q&A
- [Changing a response after approval/denial of workflow](#)
How-To

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Additional Resources

- [Notifications from Workflows Q&A](#)
- [Creating Simple Workflow Templates How-To](#)
- [Searching PowerDMS: Workflows How-To](#)
- [Dashboard Analytics Reporting: Workflows How-To](#)
- [PowerDMS Workflows: Tips and Tricks Recorded Webinar](#)

Creating Workflows



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