DocLink

Trainers

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Beyond Limits Resource

Customer Success Team

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Agenda

* Breaks is scheduled approximately at 10:00am – 10:15am.

8:00am – 1:00pm Pacific

Introductions

Workflow Usage
- What is Workflow?
  o Processing Workflow
  o Approvers
- How to Use Workflow
- Workflow Options
- GL Distribution Smart Form (Distribution Stamp)
- Integrations

Workflow Configuration
- Configuration Basics - Elements of Workflow
- Workflow Options
- Using the Workflow Designer
- Workflow Modifications and Additions

Event Manager
- Types of Alerts
- Adding Workflow User to Event Notifications
- Monitoring Events

Automation
- Send to Workflow Automation
- Routing Based on Property Values
- Adding Workflow User to Automation
- Monitoring Events

Workflow Supervisor
- Finding Documents
- Changing Status
- Changing Category

Workflow Delegation
- What is it?
- Security Considerations
- Notifications