

### 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?
  - Processing Workflow
  - 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