DMS Platform Security - User Workflow

Created on 11 Oct 2018

DMS User Only

Log In → Dashboard with menu items → Approval Hierarchy

Create new → Enter Details with approval date for each approver → Save

Copy from Grid → Edit Details with approval date. Can add new approvers → Save

→ Log out

Email Notification Received → Open the document

- Approve → Add Comments → Move to next approver
- Skip → Move to next approver
- Reject → Add Comments → Back to Originator