



CTR JOB AID

PowerDMS Navigation and Searches

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OVERVIEW

This job aid provides details on how to:

- Navigate in PowerDMS (Section 1)
- Search for documents in PowerDMS (Section 2)
- Bookmark documents in PowerDMS (Section 3)

For information on logging into or logging off PowerDMS or how to create your PowerDMS account, see the [PowerDMS Login and Account Management](#) job aid.

BEFORE YOU BEGIN

PowerDMS is a cloud-based policy and document management system. It is a searchable online source for policies and other documents and includes automated workflow for review and editing of documents. This creates efficiencies for both departments and CTR, creating a single source of truth with the ability to streamline and easily disseminate information.

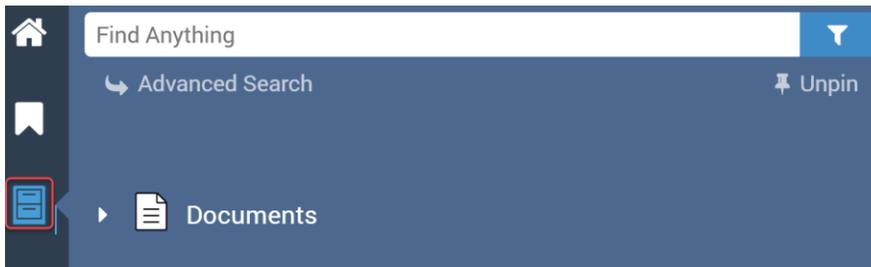
To access PowerDMS, users must have an account. All that is needed to use PowerDMS is access to a web browser and a valid account. PowerDMS can be accessed on either a PC or mobile device.

- VPN is not needed to access PowerDMS.
- Edge and Chrome are the preferred web browsers.

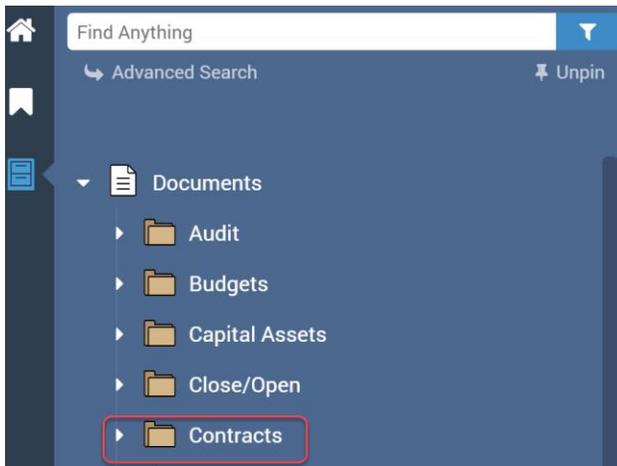
DIRECTIONS

Section 1: Navigate in PowerDMS

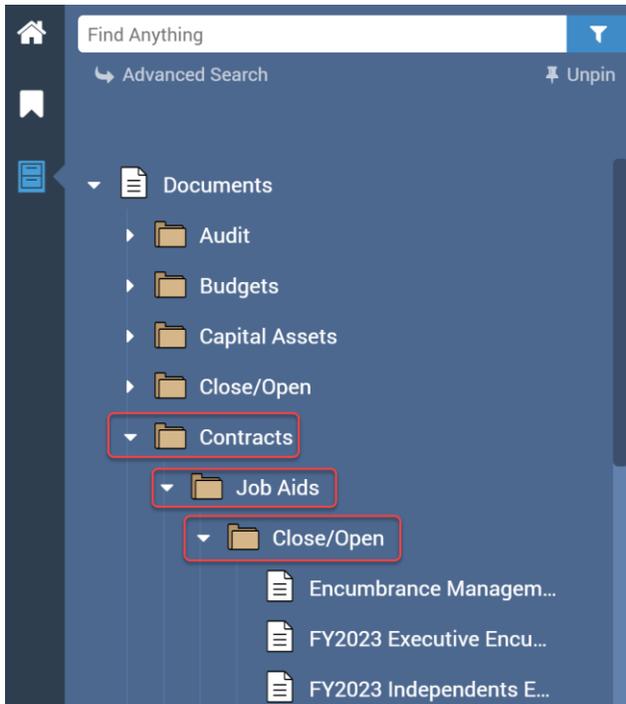
1. After logging in to PowerDMS, from the Homepage, click the **File Cabinet icon** found on the navigation panel on the left side of the screen. The **File Cabinet icon** allows users to navigate to CTR policies, job aids, training, and resource documents within PowerDMS.



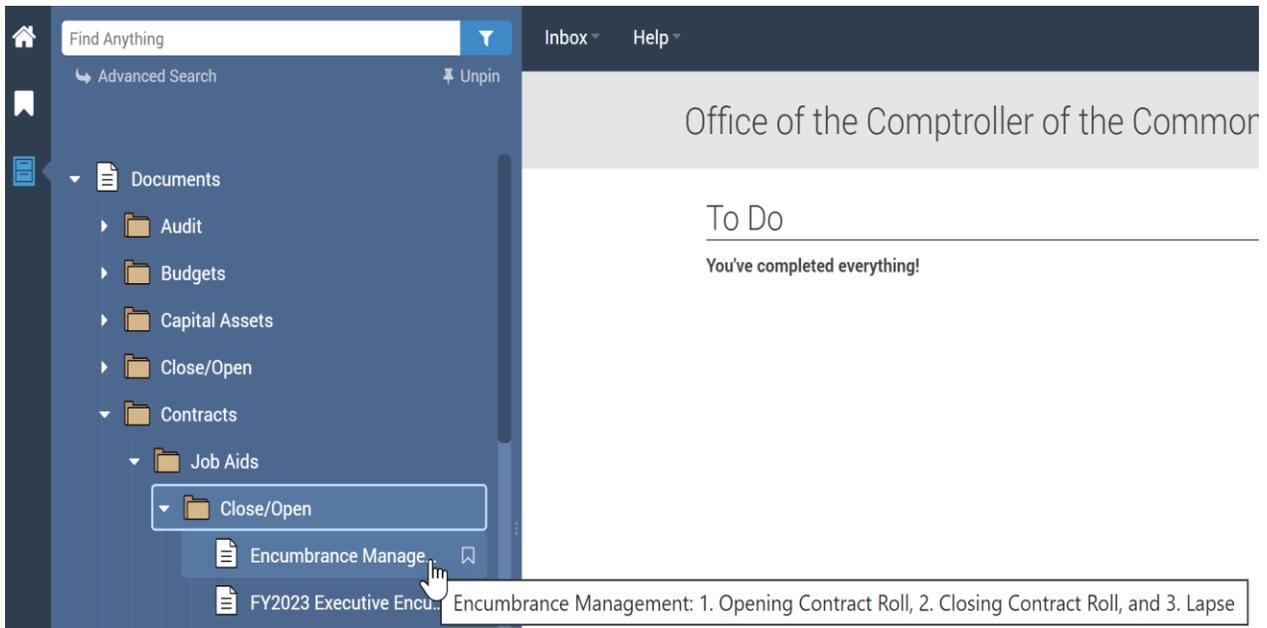
2. To expand the folders to see the documents, click the small **triangle** to the left of the **Documents** icon. The documents are grouped by business function/categories. Click on the folder to view. You can click on the **triangle** again to collapse the folder(s).



3. Click on Category folder(s).



4. Hover over the document listed to view the full name of the document, then click the document to view.



- The document will be displayed. Using the navigation bar at the top of the document, zoom in and out using the + or – sign, rotate the page or select page view.

CTR JOB AID
Close/Open Job Aid
Encumbrance Management: 1. Opening Contract Roll, 2. Closing Contract Roll, and 3. Lapse

Overview

In order to begin new FY2024 encumbering and conclude the encumbrance process for the FY2023 closing, three system updates are executed in MMARS during the Accounts Payable period. The three updates are the Opening Contract Roll, the Closing Contract Roll, and the Encumbrance Lapse.

Timing for the 2023/2024 Opening and Closing FY Updates*

The following chart notes the activity that takes place and the date that the action is expected to occur. Detailed explanations of these FY Opening and Closing encumbrance activities are provided below.

When	Activity
6/01 and 6/02	Encumbrance Suspension will be in effect prior to the Opening Contract Roll
6/03 and 6/04	The Opening Contract Roll takes place. MMARS is unavailable for all activities
6/5/2023	FY2024 is open for encumbering as a current FY
June - July 2023	Departments must correct any encumbrances rejected in the Opening Contract Roll
8/31/2023	Final day for FY2023 activity
8/31 and 9/1	Encumbrance Suspension will be in effect prior to the Closing Contract Roll
9/2 and 9/3	The Closing Contract Roll and Lapse for FY2023 take place. MMARS is unavailable for all activities
9/5 - 9/8	CTR will notify departments that have Closing Contract Roll Rejects. All rejects must be corrected by Noon on 9/7. On 9/7 and 9/8, CTR will lapse any uncorrected FY2023 rejected encumbrance transactions

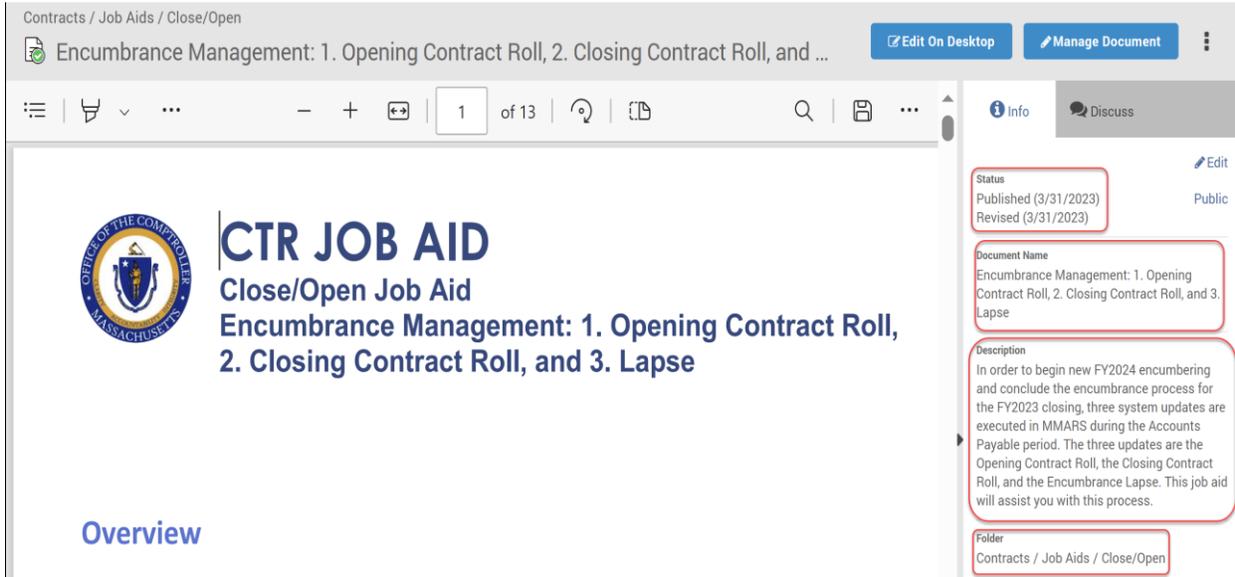
*Departments should either subscribe to the CTR Weekly Updates or view every Wednesday at <https://intranet.macomptroller.org/ctr-weekly-update/> Any changes to the dates above or other Accounts Payable Period information will be communicated through the Weekly Updates.

Contract Processing Suspension

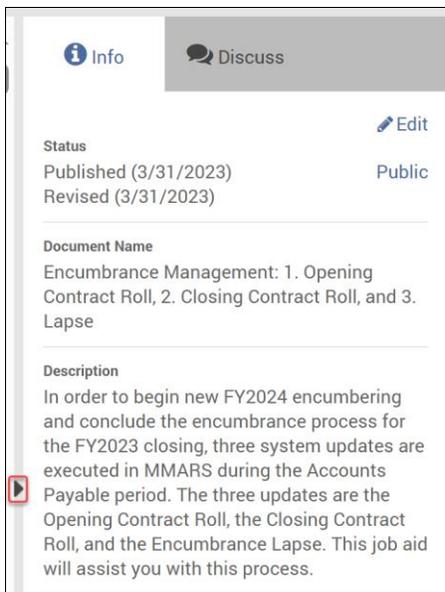
Due to CTR preparation time needed for both the Opening and Closing Contract Rolls, encumbrance processing suspension is in effect from the Thursday preceding the Roll until the Roll is completed. Departments will not be able to enter, edit, validate, or submit RQ5, RPO, PC, CT transactions until the Roll has been completed – see the calendar for specific dates.

CT and RPO pending transactions received by the CTR Contracts Unit by the Wednesday prior to the Roll will be processed if the required paperwork sent to CTR is completed properly and the encumbrance is in Pend

6. To the right of the document, is the document information panel which includes:
 - a. Date when the document was **Published** and if **New** or **Revised**.
 - b. Document Name
 - c. Short description of the document
 - d. Navigation path showing the folder where document is located

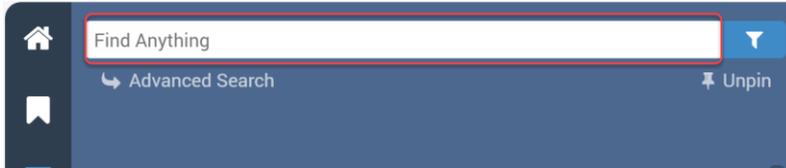


7. To hide the document information panel, click the **Triangle** to the left of the document. Click the **Triangle** again to display the document information panel.

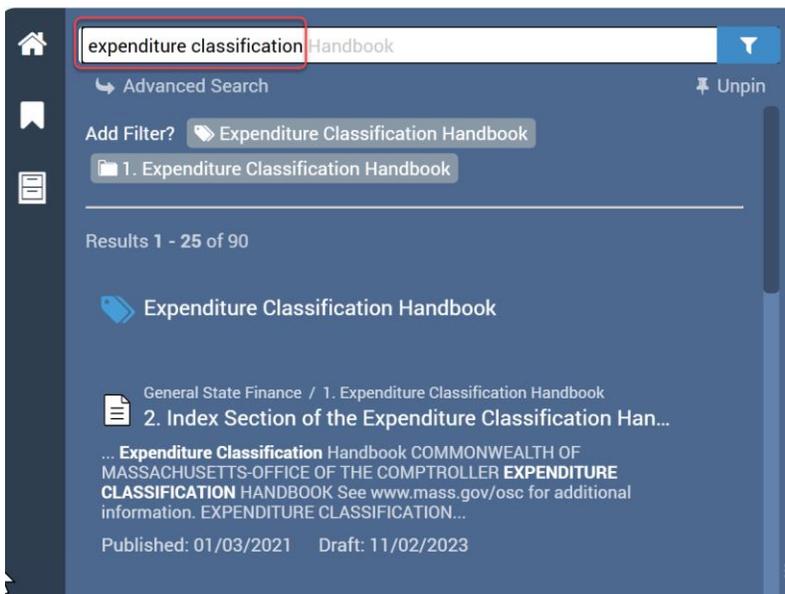


Section 2: Search for Documents in PowerDMS

1. In the **Find Anything** search box at the top of the left-side menu, enter keyword(s) to search.



2. In the example pictured below, we used the keywords, “expenditure classification”. This search shows all documents with the searched word(s).



3. The **Find Anything** search box can be used to help find relevant documents. Review the results, then scroll to the document to view and click on the document.

- Once the selected document displays, you can use the **CTRL+ F** function or **click the magnifying glass** to search for a keyword or phrase within the document.

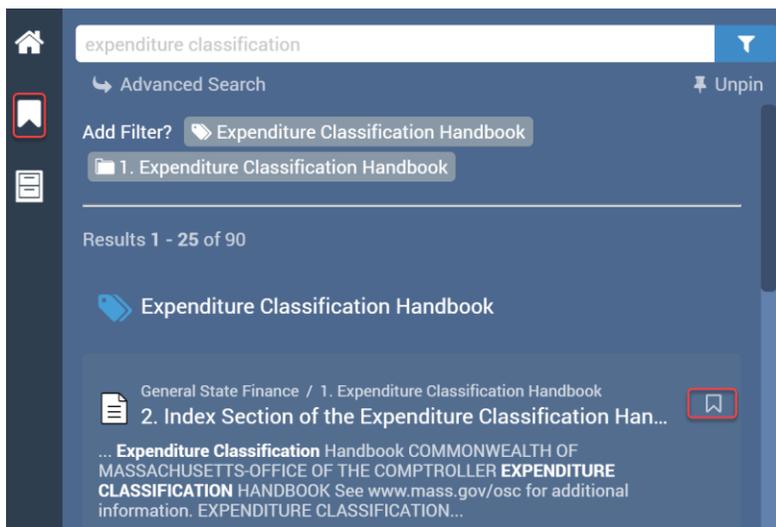
The screenshot shows a document viewer interface. At the top, there is a navigation bar with 'Inbox' and 'Help' on the left, and a search bar containing the text 'contract'. To the right of the search bar, it shows '4/39' and icons for zooming and filtering. Below the navigation bar, the document title is 'General State Finance / 1. Expenditure Classification Handbook' followed by '2. Index Section of the Expenditure Classification Handbook'. The document content is displayed in a table format, with a search bar at the top right of the content area. The table lists various expenditure categories, with 'CONTRACTED' highlighted in yellow for several entries.

A01	SALARIES: INCLUSIVE
AA1	SALARIES: SUPPLEMENTAL
A06	STAND-BY PAY
A07	SHIFT DIFFERENTIAL PAY
A08	OVERTIME PAY
A09	ROLL CALL PAY
A10	HOLIDAY PAY
A11	EMPLOYMENT RELATED SETTLEMENTS & JUDGMENTS
A12	SICK-LEAVE BUY BACK
A13	VACATION-IN-LIEU
A14	STIPENDS, BONUS PAY & AWARDS
A15	RESEARCH ACTIVITY/SUMMER SALARY COMPENSATION
A16	PROFESSIONAL DEVELOPMENT FOR HIGHER EDUCATION PERSONNEL
A20	POLICE DETAIL
A21	PAYMENTS FOR DECEASED EMPLOYEES
A75	ADVANCES PAYROLL - STATE EMPLOYEE COMPENSATION
A90	OPERATING TRANSFER
B01	OUT OF STATE TRAVEL - INCLUSIVE: AIRFARE, HOTEL/LODGING, OTHER
B02	IN-STATE TRAVEL
B03	OVERTIME MEALS
B04	JOB RELATED TUITION: INCLUSIVE: UNDERGRADUATE AND GRADUATE
B05	CONFERENCE, TRAINING, REGISTRATION AND MEMBERSHIP DUES AND LICENSING FEES
B07	HOUSING & TANGIBLE ASSET ALLOWANCES
B08	CLOTHING ALLOWANCES
B10	EXIGENT JOB-RELATED EXPENSES
B11	EMPLOYER REFUND OF NON-TAX BENEFITS
B75	ADVANCES EMPLOYEE RELATED EXPENSES
B90	OPERATING TRANSFER
B91	EMPLOYEE REIMBURSEMENT ACCOUNTS PAYABLE -NON-TAX
B92	EMPLOYEE REIMBURSEMENT ACCOUNTS PAYABLE -TAX
C01	CONTRACTED FACULTY
C04	CONTRACTED SEASONAL EMPLOYEES
C05	CONTRACTED STUDENT INTERNS
CC5	CONTRACTED STUDENT INTERNS (CAMPUS EMPLOYMENT)
C09	SALARIES PAID TO HIGHER EDUCATION CONTRACT EMPLOYEES PAID FROM FUND 900 (CASH WITH CAMPUS) THAT ARE NOT CATEGORIZED IN ANY OTHER CC OBJECT CLASS

Section 3: Bookmark Documents in PowerDMS

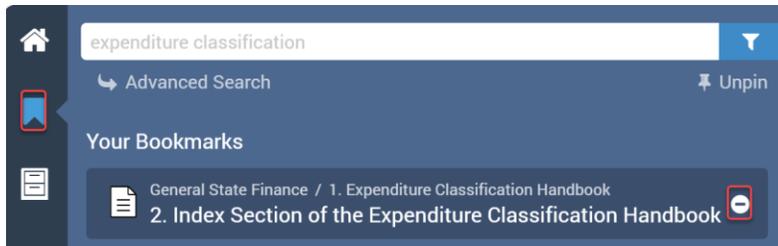
How to Bookmark Documents

1. From the navigation panel on the left side of the screen, navigate to the document or folder to bookmark.
2. Click the **Bookmark** icon to the right of the document.
3. To view the Bookmarked documents, click the **Bookmark** icon on the left side panel.

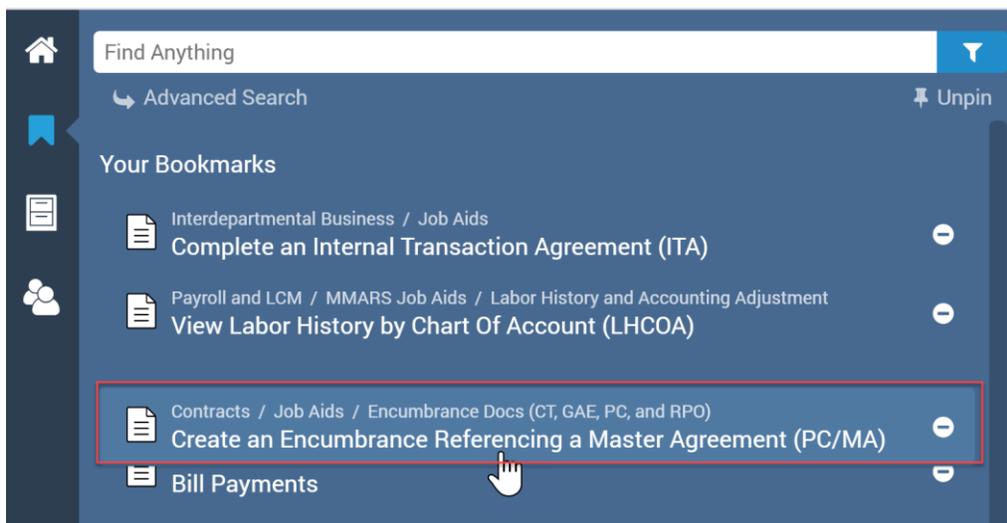


Managing Bookmarks

1. To un-bookmark any of these documents, click the (-) to remove the **Bookmark**.



2. To change the order of how your bookmarks are displayed, hover over the bookmarked document. While holding down the left mouse button, drop and drag the document to where you would like it to be placed.



FOR ADDITIONAL QUESTIONS

If you have questions about this Job Aid, please submit an inquiry to our [Solution Desk ServiceNow Portal](#). You may also click: macomptroller.org/solution-desk to learn more about the CTR Solution Desk and access the ServiceNow Portal.