PROCEDURE MANUAL
01-02

MICHIGAN STATE POLICE

PowerDMS User Manual

Purpose: This manual provides procedures on accessing and using PowerDMS, including navigating the dashboard and providing electronic signatures.

Effective Date: January 23, 2025

Supersedes: Procedure Manual 01-02, dated April 19, 2022

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PowerDMS User Manual

Definitions:

PowerDMS: PowerDMS is an electronic document management system that is used to store and disseminate department written directives and Official Forms, as well as provide training, testing, and surveying of members. PowerDMS is web-based software accessed via the Internet at PowerDMS.com.

Site Key: The site key, **MSP1917**, identifies the unique profile of the Michigan State Police (MSP) within PowerDMS.

Section 1: Basic Use of PowerDMS

1.1 Logging into PowerDMS

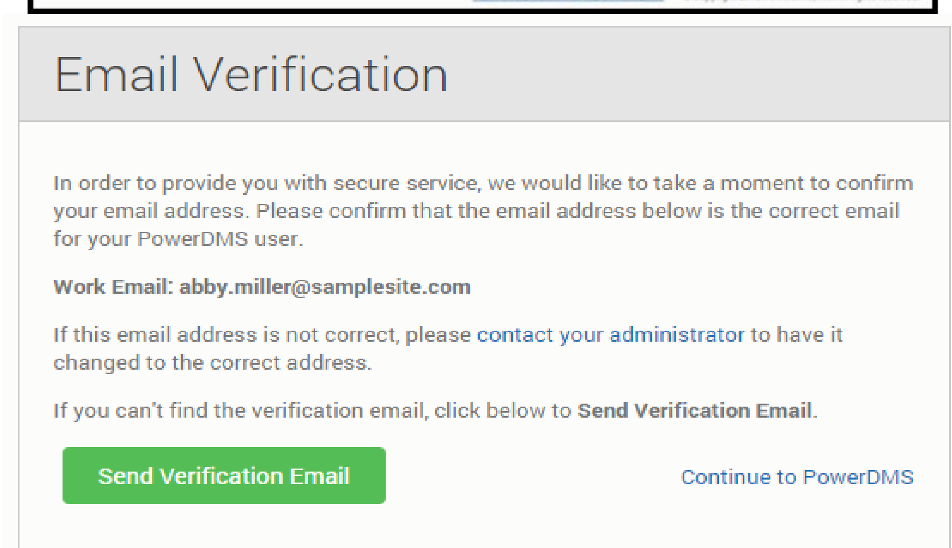
a. To log into PowerDMS, members must enter their username and password into the appropriate fields of their PowerDMS login screen then click the green “Login” button.

b. To reset a password, select “Forgot Password” and PowerDMS will email a password reset link to the email address in the PowerDMS system.

c. Members may receive a prompt to enter a “Site Key,” which is **MSP1917**. If they are unable to log in with this information, they should contact the Planning, Research, and Accreditation Section at MSP-PowerDMS@michigan.gov.

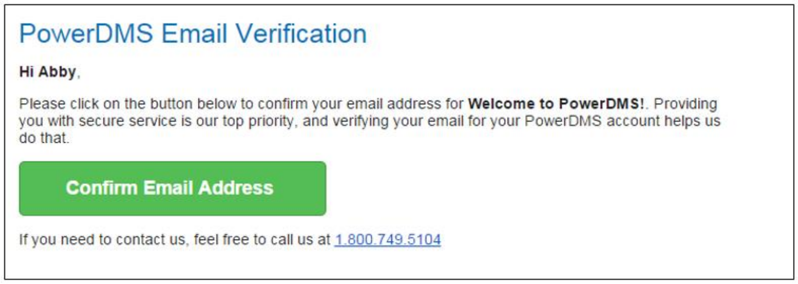
d. The “Username” will be members’ department-issued email address, with a password that is created during their first login.

i. Members will be prompted to change their password every 180 days.



e. If the email address has not been previously verified with PowerDMS, members may be prompted to do so. They should click "Send Verification Email" to receive an email with instructions for verifying their email address.

f. To verify an email address, members should click on the “Confirm Email Address” button. PowerDMS will send a notification when the email address has been verified.



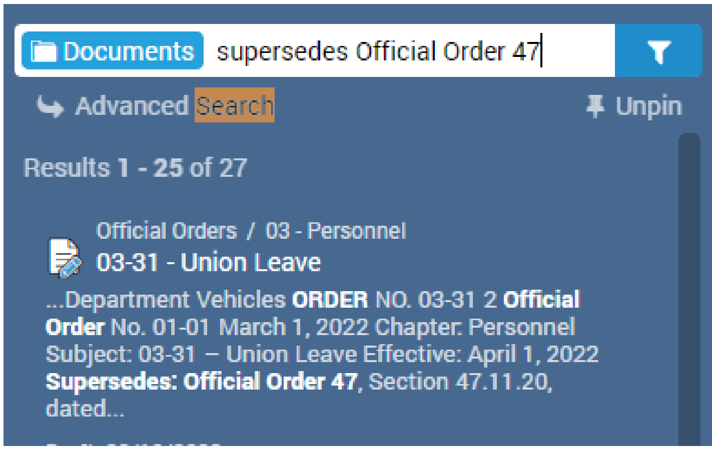
1.2 PowerDMS Homepage

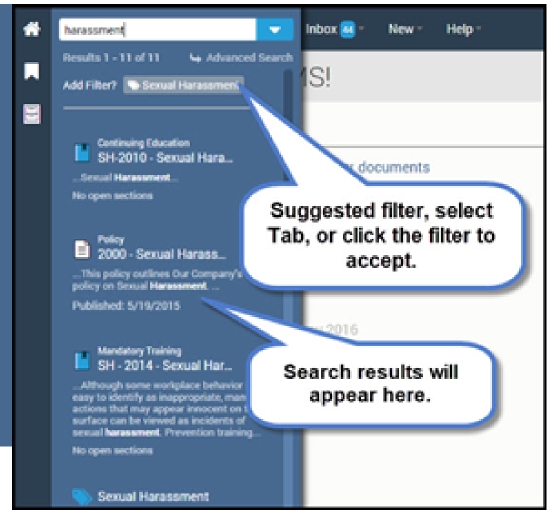
The PowerDMS homepage shows a snapshot of member assignments, what has been completed, as well as any other notifications or messages received. The “To Do” list is a snapshot of all the items required to be completed or signed. Those items can be accessed by clicking the appropriate item title.

1.3 File and Document Search

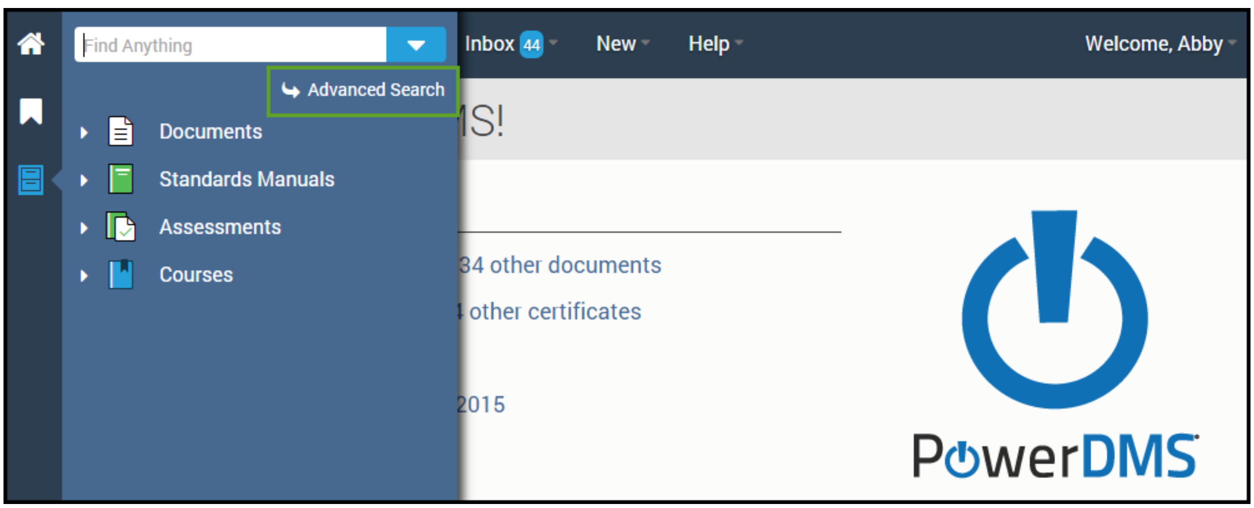
a. Documents within PowerDMS can be searched using the “Find Anything” search box located at the top of the blue left-side menu. Keywords can be entered in the “Find Anything” search box. PowerDMS also provides the option to add filters to refine the search. To apply a suggested filter, click the suggested word(s) or press the tab key.

b. Searches can also be narrowed down to a particular folder or set of folders by first clicking on the folder and then typing keywords into the “Find Anything” search box.





c. To view all items in a specific category (Documents, Courses, Users, etc.), hover over "Find Anything" and select the applicable category from the drop-down menu or click the appropriate category in the blue menu.



d. Using "Advanced Filters," enables searches for a file based on the following criteria:

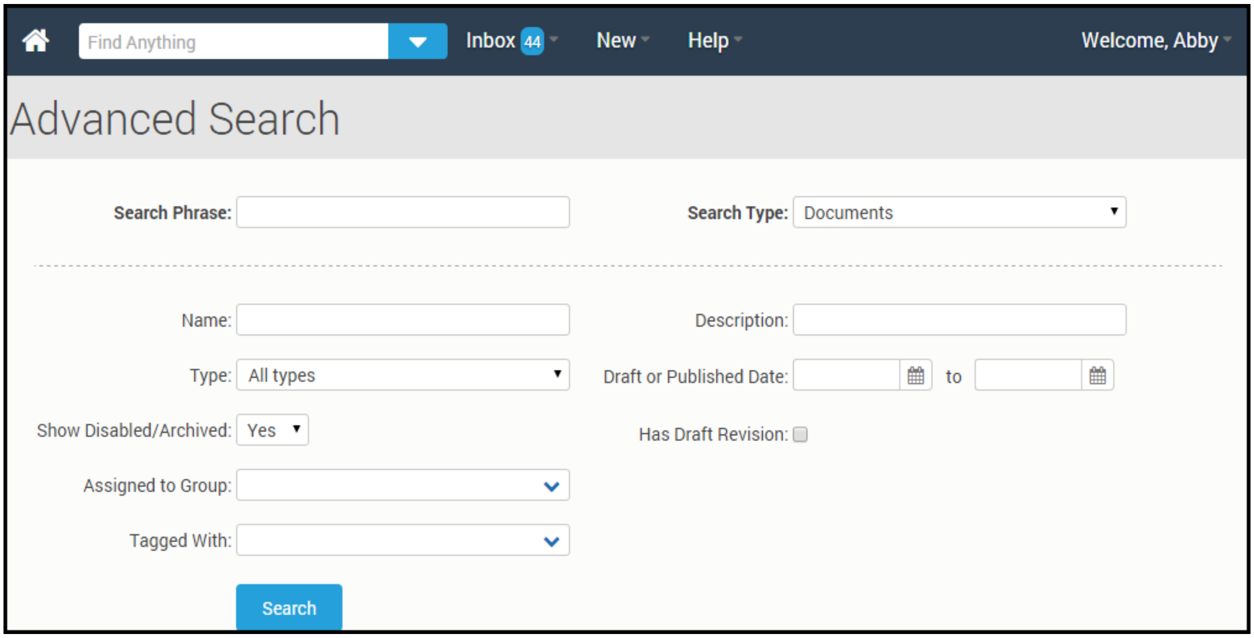
i. Name

ii. Description

iii. Type

iv. Revision Date range

v. Tagged With (Keyword Tags)

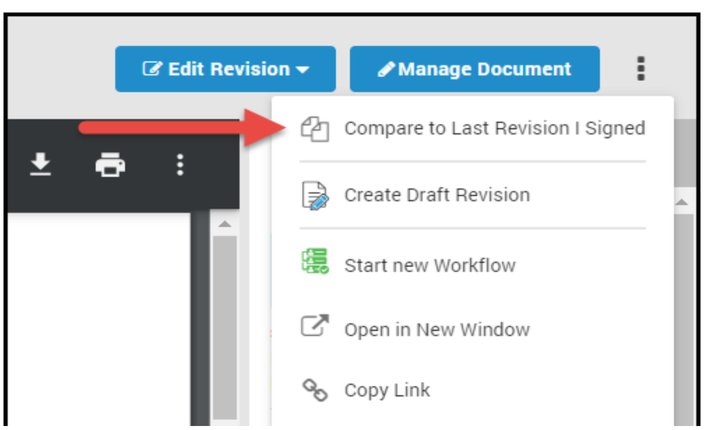


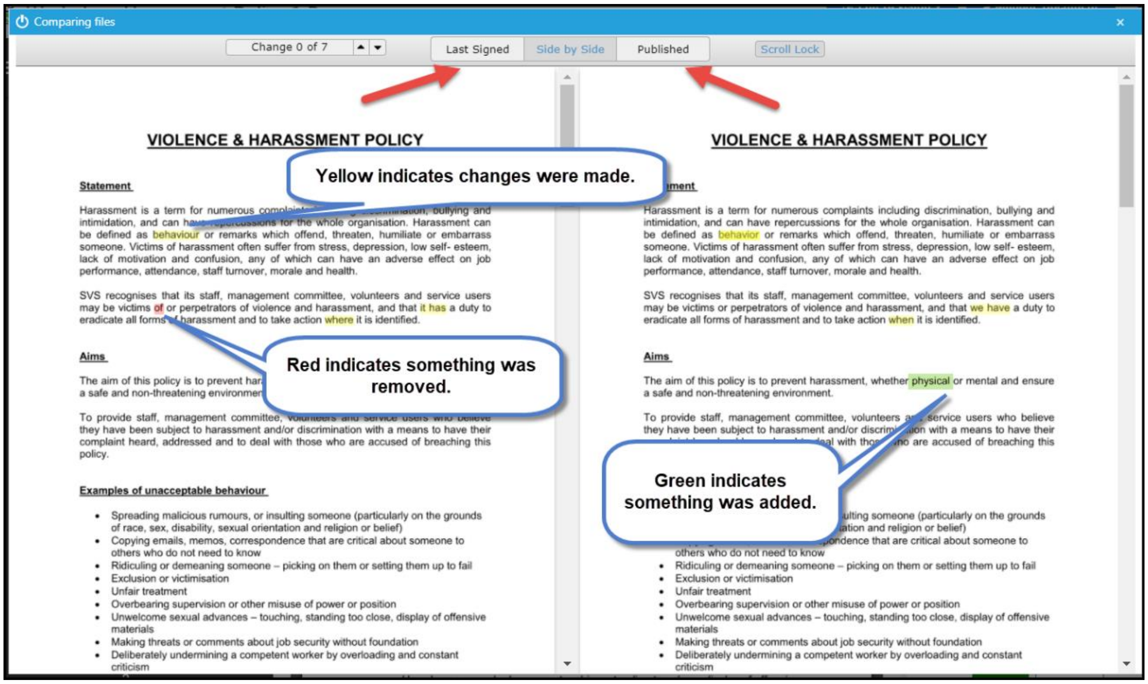
1.4 Signing a Document

a. To sign off on a document, members should navigate to their "To Do" list and click on the document's title. After reviewing the document, they must enter their username and password in the designated boxes located in the bottom right corner of the screen. PowerDMS will record the electronic signature once the user clicks the "Sign" button, acknowledging that they have read the document. Each document is automatically removed from the user's "To Do" list and "Inbox" after it has been read and signed.

    i. In some cases, users may be required to achieve a passing score on a comprehension test within PowerDMS before adding their electronic signature.

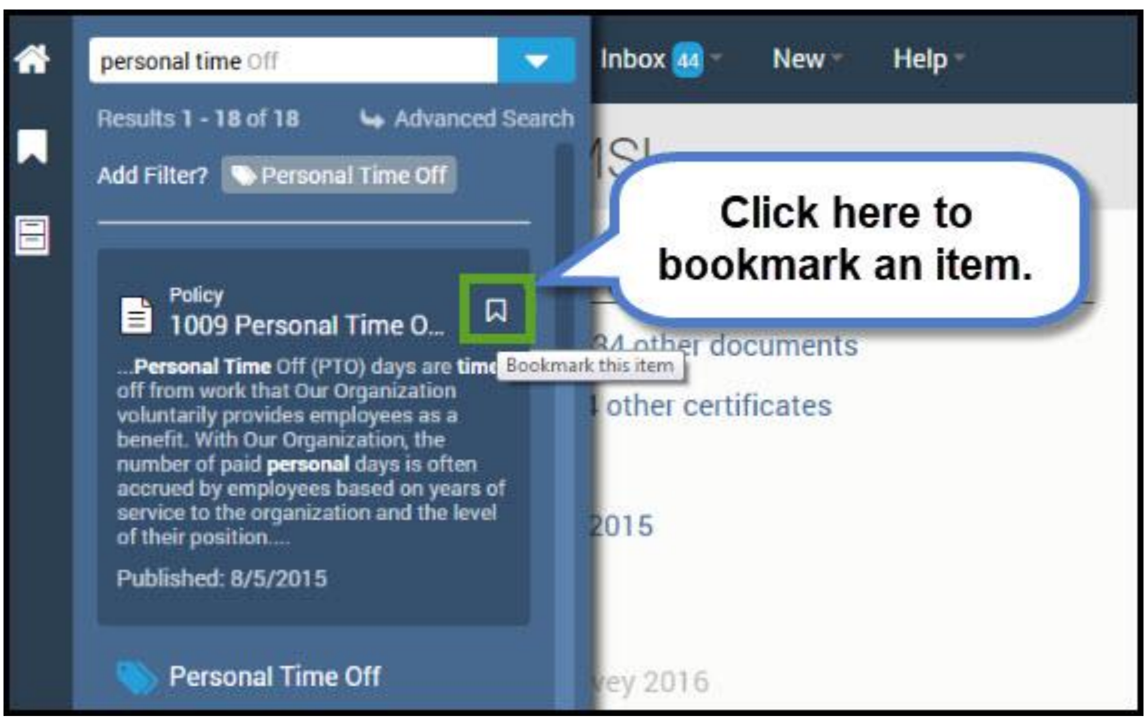
b. If a document has been revised from a previously signed version, members may wish to review the prior version to compare changes before signing off on the new version. To do so, members can click the three dots in the upper-right corner of the Document Viewer window and select "Compare to Last Revision I Signed" from the drop-down menu. Clicking this option will open both versions side by side for comparison.





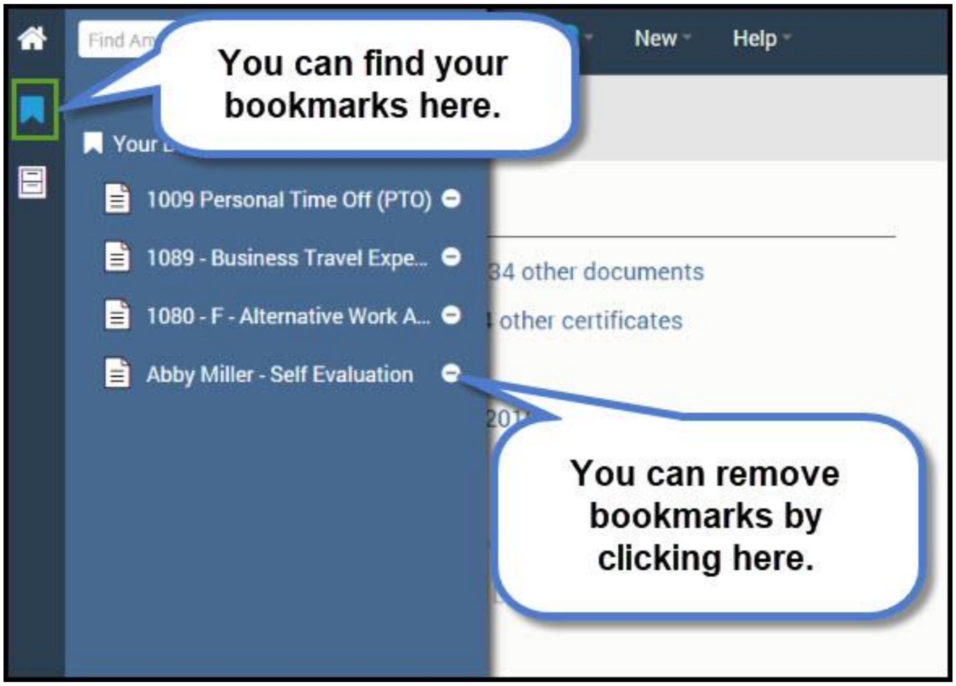
1.5 Bookmarks

a. PowerDMS allows members to bookmark items to access quickly and saves them in a special "Bookmark" folder. To create a bookmark, locate the file and click the bookmark icon to the right of the title.



b. Bookmarked documents are linked from their original folder to the "Bookmark Folder," allowing members to quickly access frequently used files without searching through all documents.

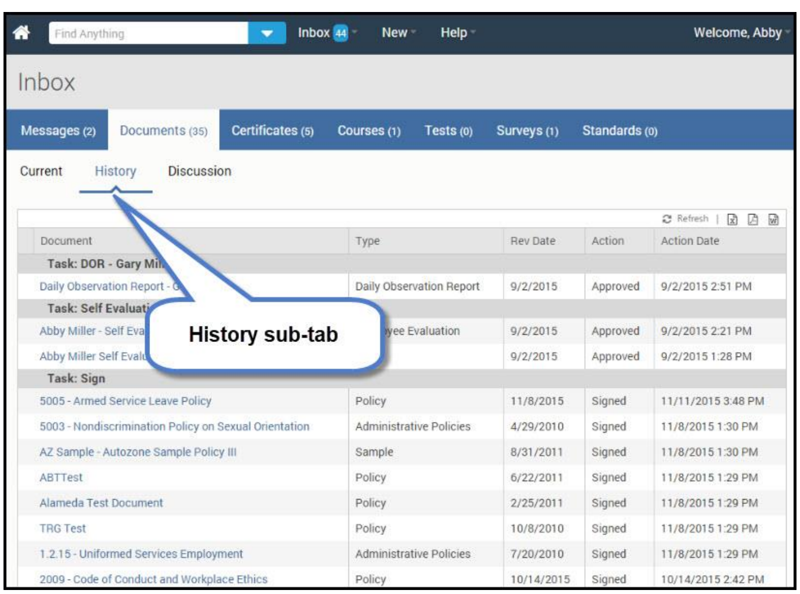
Members can create as many bookmarks as needed and can remove a bookmark at any time by clicking the minus symbol next to the name of the bookmarked file.



1.6 History

a. After documents are imported into PowerDMS, the software tracks all changes made and actions taken on those documents. To view an overview of file history by category (e.g., Documents, Certificates, Courses), members can hover over the “Inbox” in the top menu bar and select the desired category. Once the category is displayed, members can select “History.”

b. Specific document or file history can only be viewed by the document creator or a site Administrator.



1.7 Logging Out of PowerDMS

To logout of PowerDMS, hover over “Welcome, NAME” and click “**Logout**.” Members may be automatically logged out after a period of inaction.

Section 2: Workflows

Members who are responsible for review and revision of department documents (Official Orders, Procedure Manuals, Official Forms) will use the “workflow” functions of PowerDMS. This will be the method for creating and reviewing all documents to be published within PowerDMS.

The Planning, Research, and Accreditation Section shall initiate all workflows and be responsible for publishing all documents following final approval.

2.1 Participating in a Workflow

If a member is requested to collaborate on a document, they will receive a notification in their PowerDMS inbox. Additionally, the document requiring their attention will also appear in the member’s “To Do” section of their home page.

a. Click on the document that requires action. This will lead to the workflow screen where the following can be done:

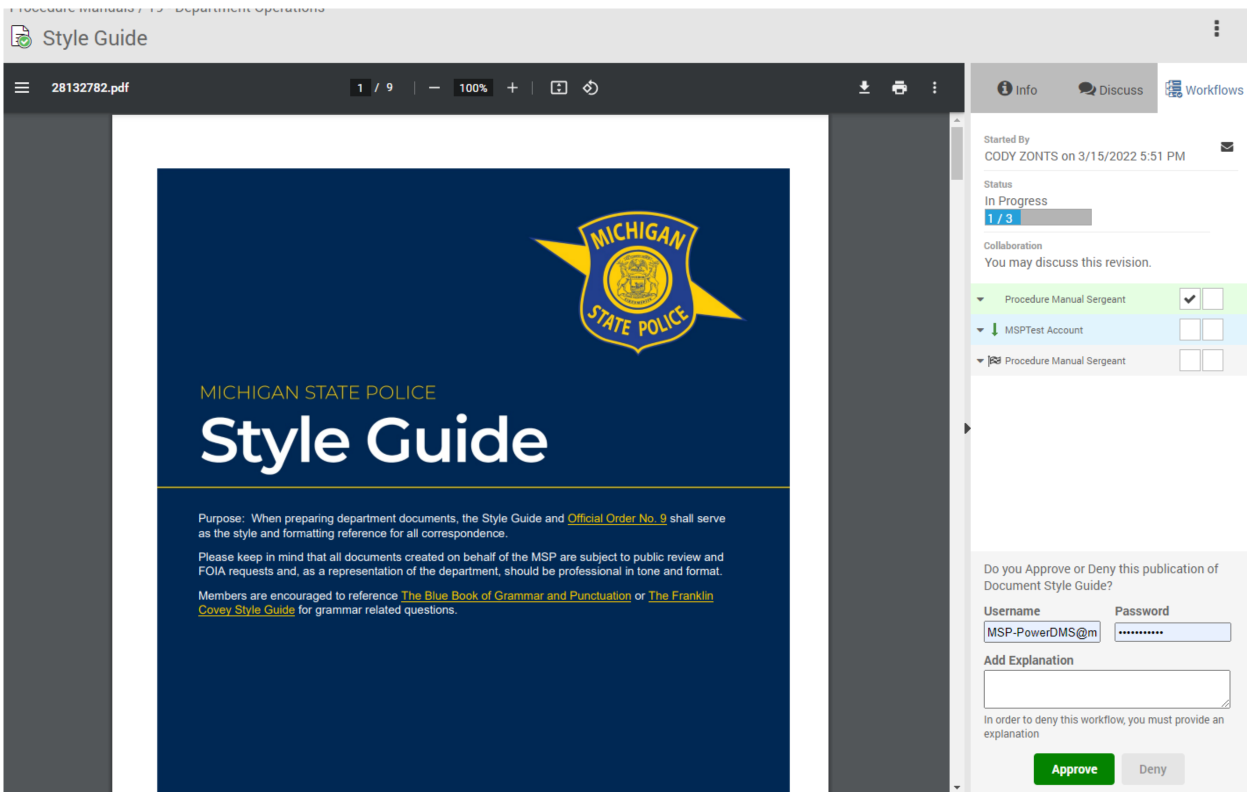
   i. See other members assigned to the workflow.

   ii. Compare the document to previous revisions.

   iii. Compare the document to the start of the workflow.

   iv. View information about the document.

   v. Participate in the discussion board for the document.



2.2 Revision of Documents

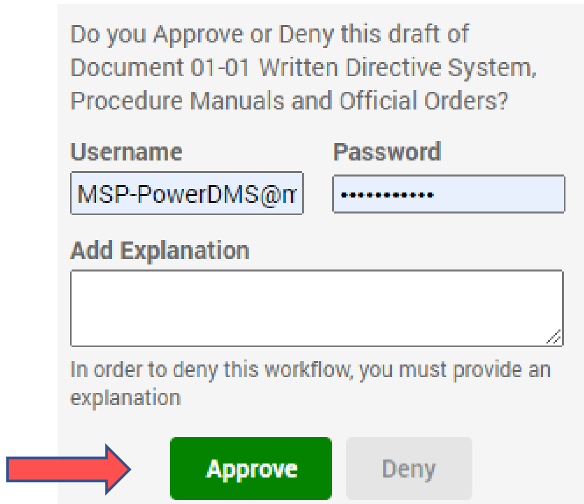
a. Document edits shall be performed only by members of the Planning, Research, and Accreditation Section.

b. Members who are participating in the review or revision of a document shall use the discussion board of that document to relay the necessary information needed.

   i. Comments made in the discussion board will remain in the discussion board and are subject to department directives on communication, as well as FOIA regulations.

2.3 Advancement Within Workflows

a. Members can approve the document and advance it to the next step within the workflow by entering their username and password, then clicking approve.



b. Denial of a document will cause the workflow to stall until the reason for the denial has been addressed.

c. Members will have a specified timeframe from the start of the workflow to complete the review and provide feedback, if necessary.

d. If a document has been held up past the allotted time for review, the administrator of the workflow can “skip” that step and advance the document. This will cause an alert to the member who was skipped, as well as all others participating in that workflow.

2.4 Publication of Documents

Once all steps of the workflow have been completed, the document administrator will receive an alert. The Planning, Research, and Accreditation Section will ensure all edits are made and prepare the document for publication.

Section 3: Running Reports

Department members at the 14-level and above can run reports in PowerDMS to verify members assigned to their worksite are completing assigned tasks, including signing written directives and completing training courses. Reports can also be run on work unit policies and procedures if signatures are required for the document. Reports can be displayed in a web browser or downloaded as an excel, csv, or PDF document.

As established in Official Order 01-01 – Written Directive System, members have the responsibility of knowing and understanding department rules and regulations. Additionally, commanders are responsible for ensuring that members of their command read and have an opportunity to request explanation of the department’s rules and regulations. By running reports in PowerDMS, commanders can determine if members assigned to their worksite are completing assigned tasks and can quickly identify any issues that may exist. If assistance is needed or to add a designee to run reports, please contact MSP-PowerDMS@michigan.gov.

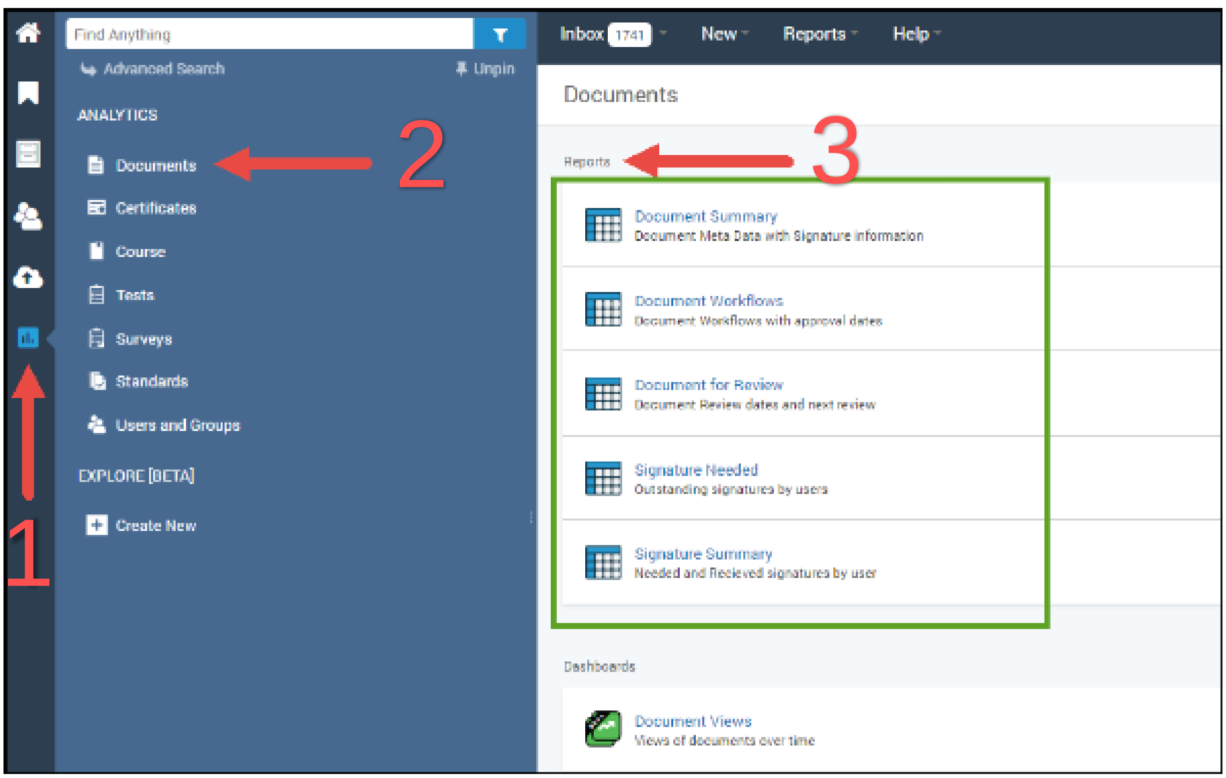
3.1 Accessing Analytics Reports

To run and view a document report, members must at least have audit rights for both the document and users. If the proper permissions have not been established to view the document or users, a "hidden due to security" notification will appear. If there are items or members that are omitted from the report that should be there, please contact MSP-PowerDMS@michigan.gov to ensure the appropriate privileges have been granted.

a. Upon signing into PowerDMS, click the Analytics bar graph icon which is in the left blue sidebar menu.

b. A list will appear of the available categories to run a report on, including documents, certificates, courses, etc. Click the desired report category.

c. A list will appear of the different report types available. Select the desired report type from the options that appear.



d. Members are the 14-level and above have been granted limited administrative access and will see the following reporting options with results displaying only for members within their assigned work unit:

i. Documents

1. Document Summary: Document data with signature information.
2. Signatures Needed and Received: Needed and received signatures of documents to be signed by a user.

3. Signatures Summary: Information about documents to be signed by the user.

ii. Certificates

1. Certificates Awarded: A detailed list of certificates that the user has earned based on criteria.

2. Certificates Needed: A detailed list of certificates the user needs to earn based on criteria.

iii. User and Groups

1. Inbox Summary: Summarizes the items by count in each user's inbox.

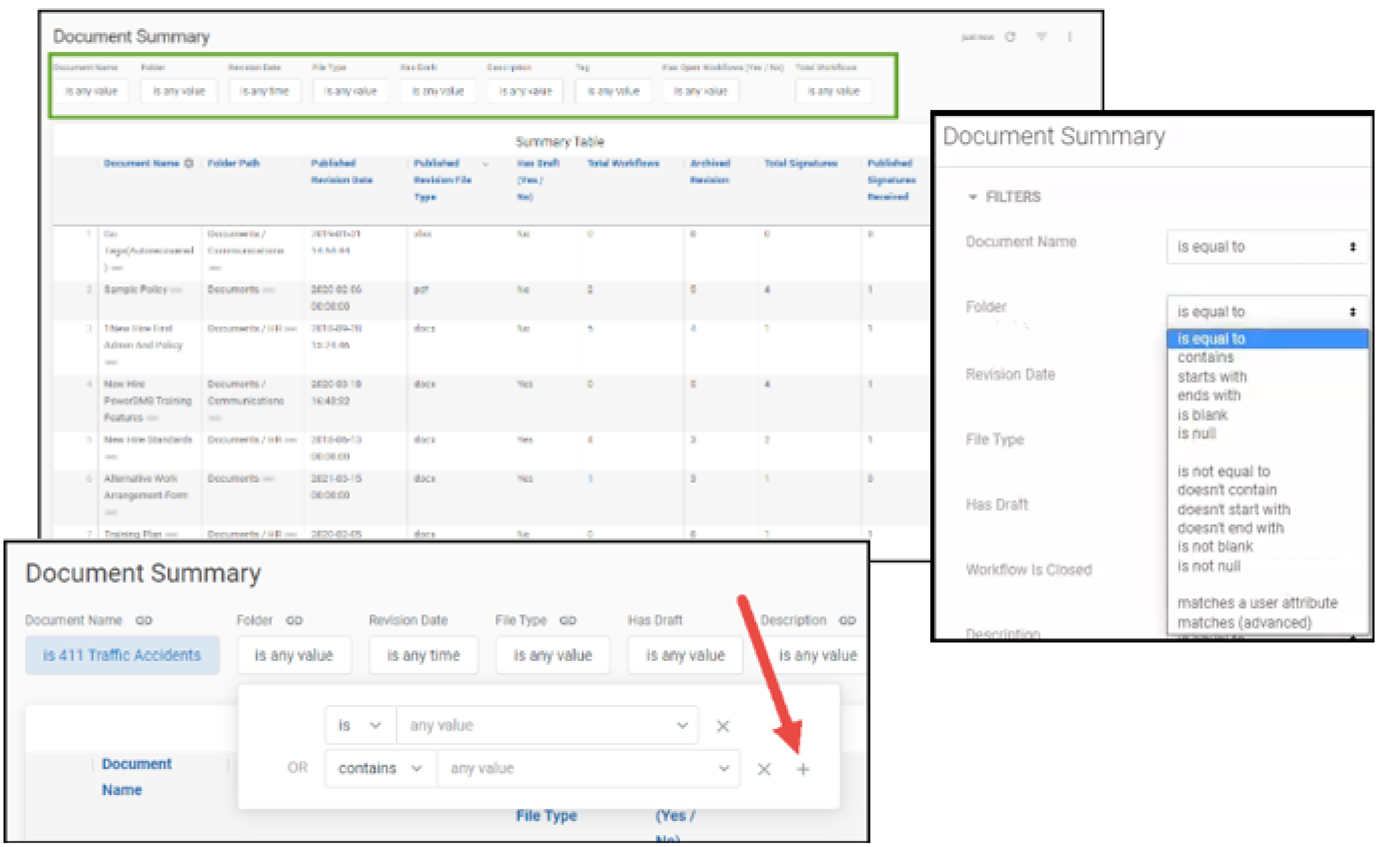
a) This is likely the report type that will be most beneficial to run.

2. User Inbox: A list of items in a specific user's inbox.

3.2 Running and Filtering Report Data

a. After choosing the report category and type, a table of data will appear.

b. To filter the data, choose from the appropriate filter options at the top of the screen, above the report. Each report type will have different filter options, depending on the information included in the report.



c. Search criteria can be further specified from each filter option's drop-down menu.

d. Filtering will also provide additional criteria for each section. Click the plus symbol and it opens new filtering fields to enter additional criteria.

e. After selecting the filter criteria, click the blue circle arrow icon in the upper right corner of the screen to see the report results.

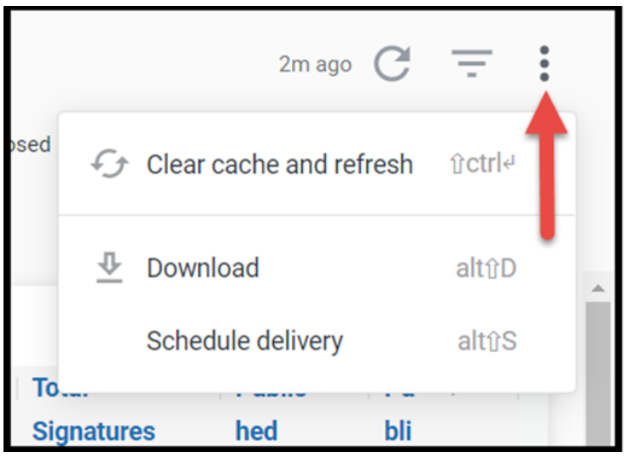
3.3 Downloading Reports

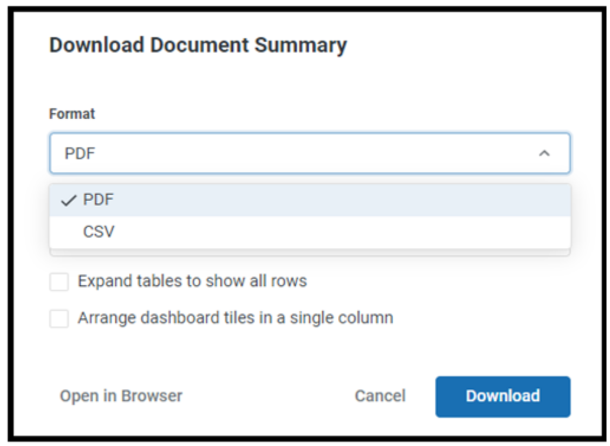
Reports can be downloaded from a couple of locations and in various file formats. The main report can be downloaded as well as the drilled-down data from within that report

a. Click the three dots in the upper right corner of the screen for the option to Download the report or Schedule delivery of it.

b. Click Download. In the pop-up window, the option to download the report as a PDF or CSV file will appear. The number of rows to download can also be selected. Only 500 rows of data will display at a time. If it's necessary to download all the table data, click the box next to Expand tables to show all rows before clicking Download.

c. Click Download after selecting the appropriate criteria.





3.4 Administrative Dashboard

As a limited administrator, a lot of information is available simply by logging into PowerDMS. Upon logging into PowerDMS, the page will display a **To Do** list, as well as an **Administrative Dashboard.** The administrative dashboard gives a tabbed view of items and users that an administrator has the ability to view and run reports on.

a. **Users**
    i. This tab will list the top five users who have the most outstanding items in their **To Do** list. To view additional users, click **Load More** at the bottom of this tab. The bar chart only indicates the total number of items in that user's inbox excluding messages. To see a more detailed summary of the items in the user's inbox, hover your cursor over the bar graph. Click **Run Report** to get an inbox summary report for just this user.

b. **Groups**
    i. This list will display the groups that an administrator is a part of and has privileges to. Each group will be represented by their name, with group members listed under that group name. The bar chart shows the total number of items in the inboxes of all members, excluding direct assignments to individuals, messages, and courses. To see a summary of the items in the group's inbox broken down, hover the cursor over the bar graph and click **Run Report** to an inbox summary report on all group members.

c. **Documents**
    i. This list will display the top five documents with the most outstanding signatures. The bar chart shows the number of signatures collected and the total number of signatures still needed. Hovering over the bar will show that information in more detail. By selecting **Run Report** an administrator can get a **Signatures Needed** report which will show who still needs to sign off on that particular document.

d. **Workflows**
    i. This list will display the top five workflows that have stagnated the longest or have stalled on one step the longest. What will display are those workflows that an administrator is a part of. Both document and training-related workflows may appear on this tab. The bar char shows the steps of the workflow. Completed steps appear in green, active steps are blue and inactive steps are gray. Hovering over the bar will show who completed the previous step and who the workflow is waiting on and who it is going to next. If participants have made comments, a link under the document name will indicate the number of comments. Click on the comments to view each.

e. **Training**
    i. This list will display the top five certificates, courses, or tests that an administrator has been given access. They will each be ordered by the percent that is incomplete. This will not include tests that are attached to a document. The bar graph shows the status of each represented item.

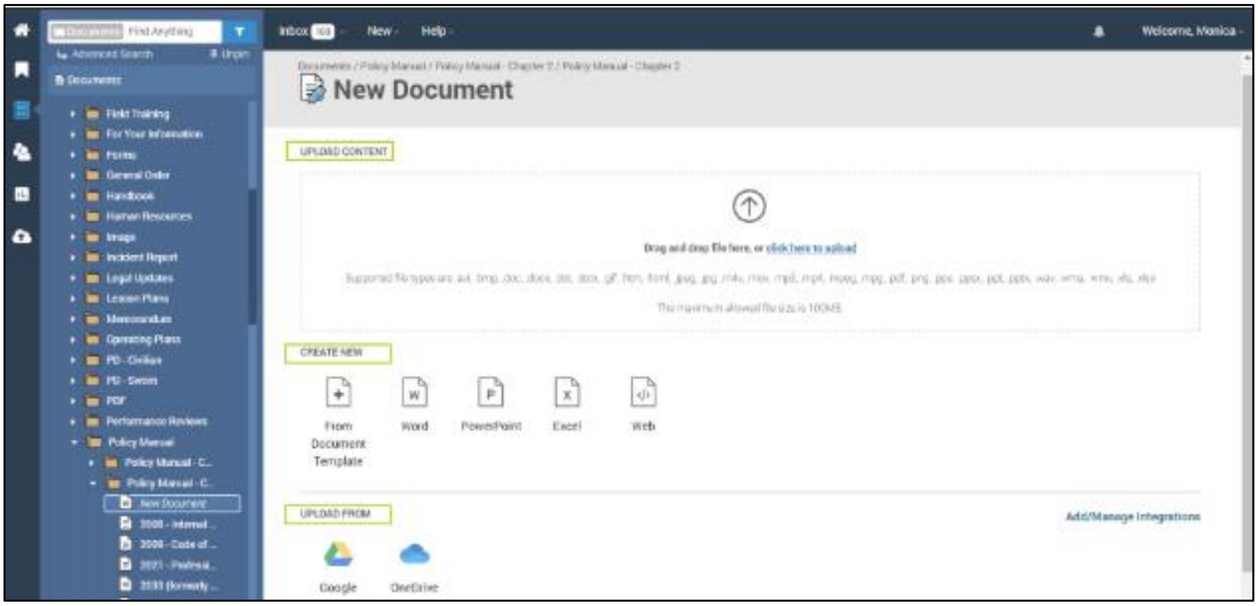
Section 4: Uploading & Revising Documents

4.1 Uploading Documents into PowerDMS

a. Click on the three-dot ellipsis next to the folder that the document should go into, then click **New Document**.

b. Under the **New Document** menu, there are three categories to choose from:

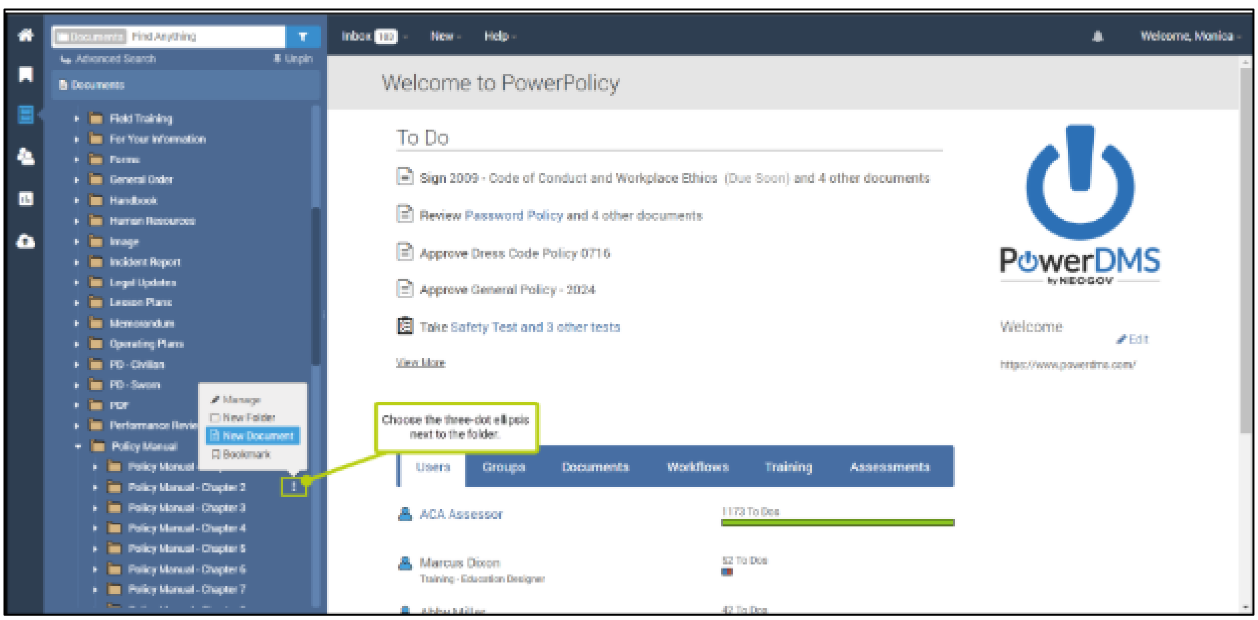
i. **Upload Content**: Upload a document of any type from the supported file type list up to



100MB in size. The document can be dragged and dropped or click the link to upload.

ii. **Create New**: Create a new (blank) document from a Document Template or MS Word, PowerPoint, Excel or Web document.

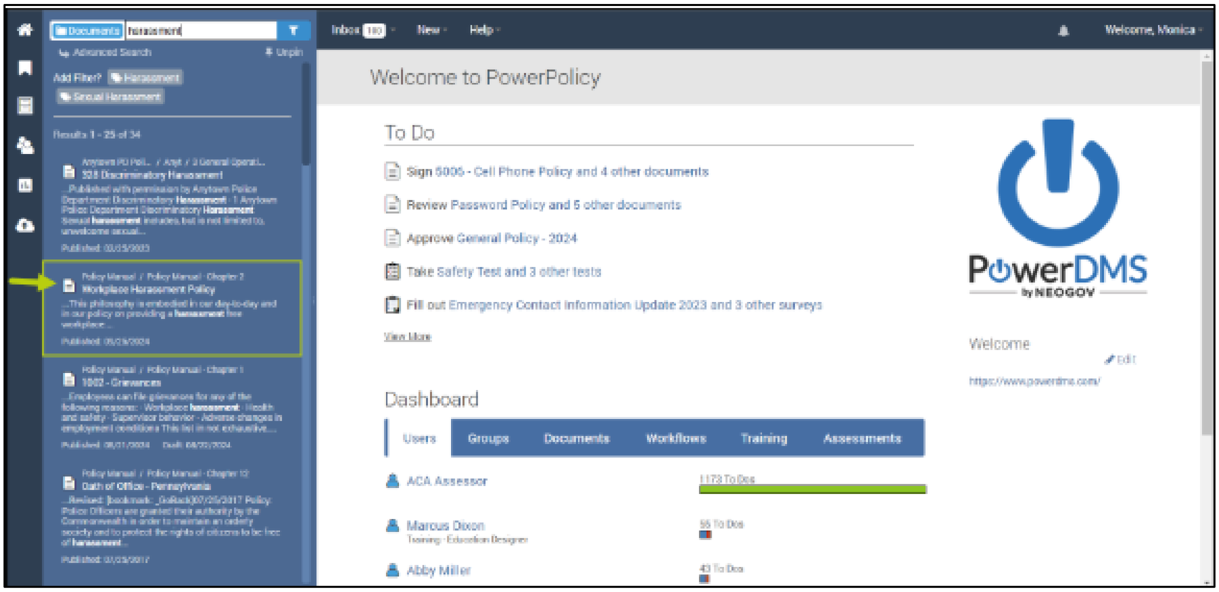
iii. **Upload From**: Upload a document from Google Drive or OneDrive.



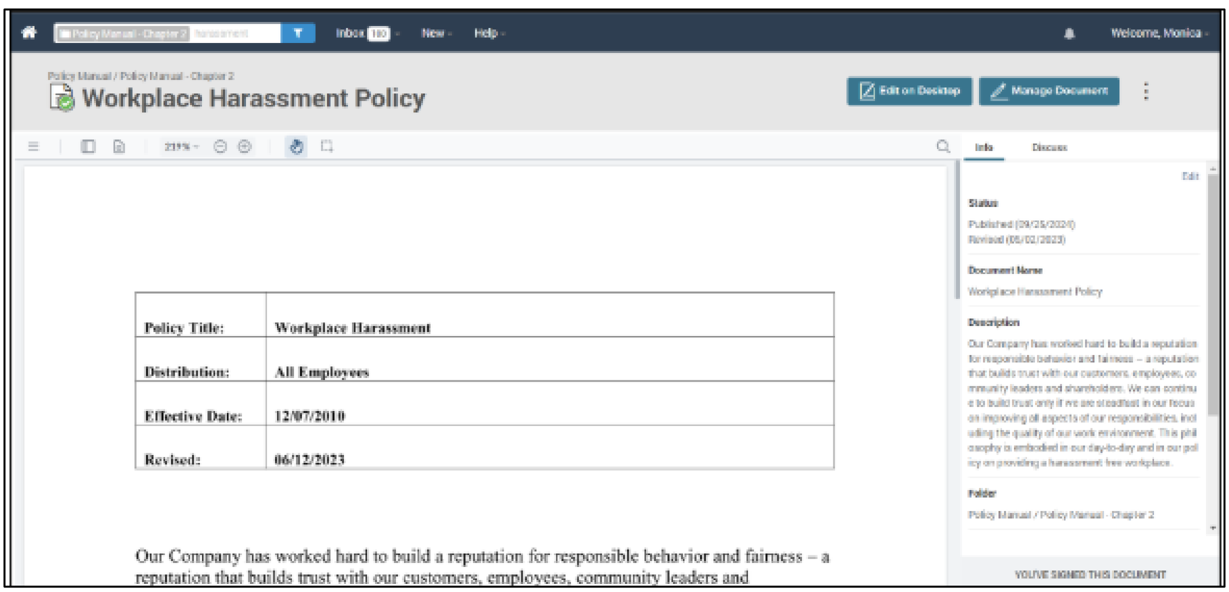
c. Once a document has been uploaded, members may be prompted to either download or start PowerDMS Author. PowerDMS Author is the tool that allows PowerDMS to communicate with Microsoft Office and Adobe products. Once Author is installed documents can be edited, sent into workflows, out for signatures, and tracking of all document changes.

4.2 Revising and Republishing a Document

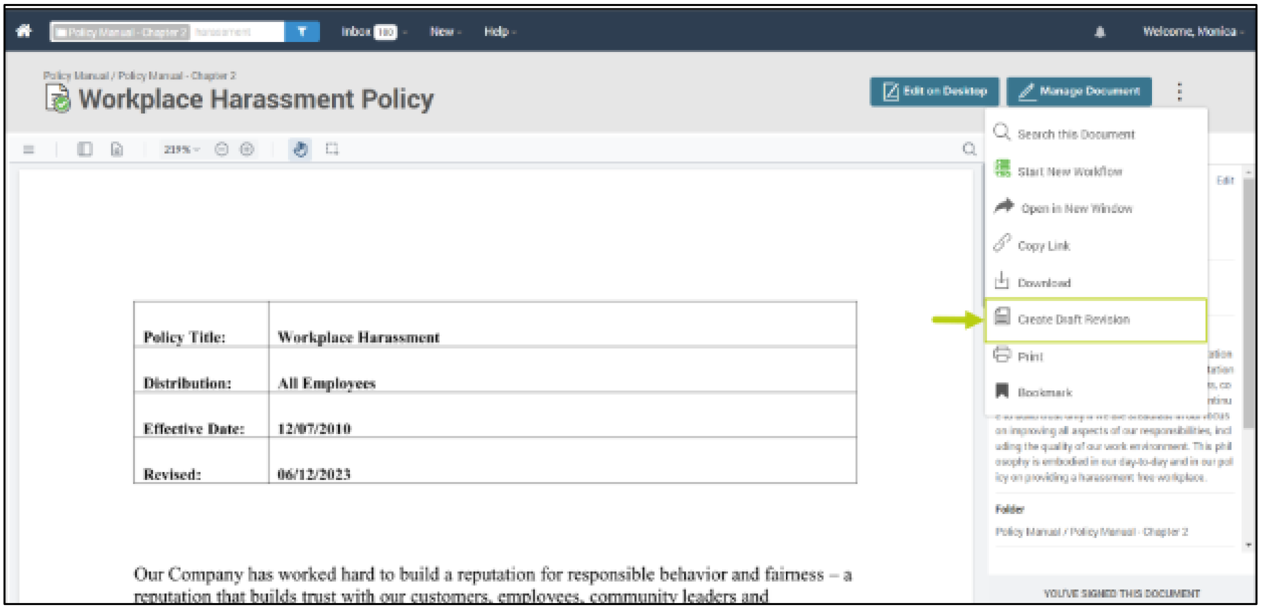
a. Navigate to the published document that needs to be revised. To speed up the process of locating the document, the **Find Anything** search bar may be used. Once the document is located, click on its name.



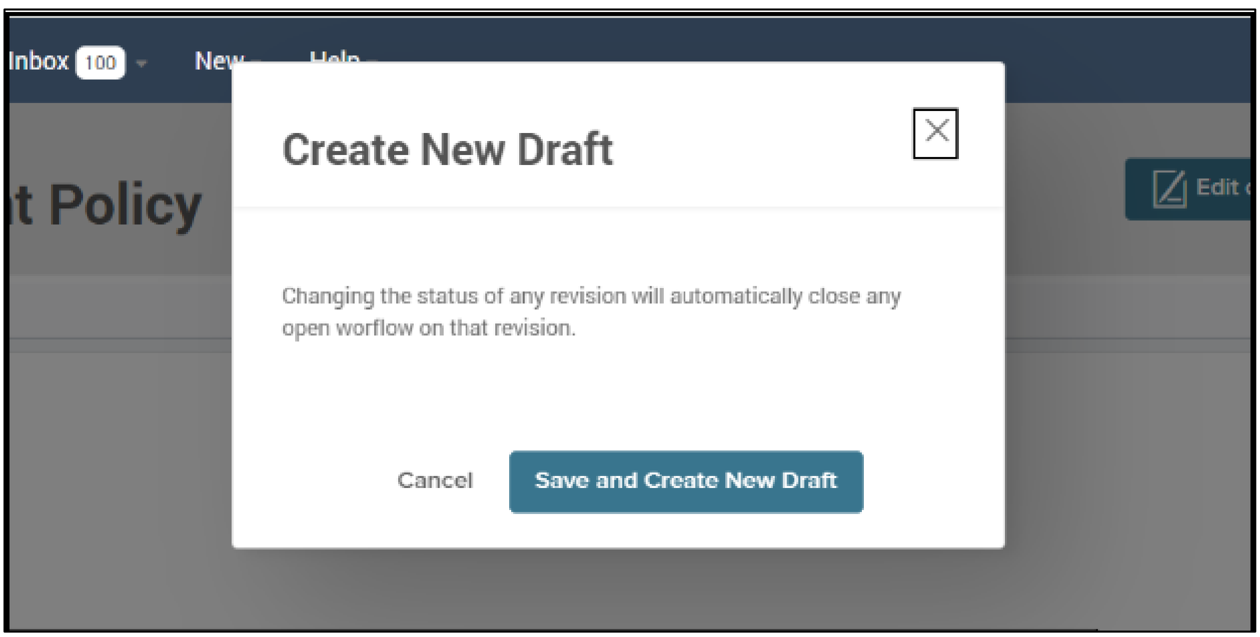
b. PowerDMS will open the document in the Document View window.



c. If a document is published, a new draft must first be created. To do so, click the three dots in the upper right corner of the Document Viewer window. Select **Create Draft Revision** from the drop-down menu.



d. PowerDMS will confirm that a new draft should be created from the revision. Click **Save and Create New Draft** to continue.



e. The draft will automatically open in the Document Viewer window.

   i. To edit, click on the blue **Edit on Desktop**. PowerDMS Author will open the document. If editing an HTML document, click **Edit in Browser**.

f. Once the desired changes have been made, be sure to click the **Save** icon on the document.

g. Close the document on the desktop. The document will appear on the document viewer of the PowerDMS. Alternately, selecting the green **Finish Editing** button at the top right corner in PowerDMS will return the document to the viewer.

Review Responsibility: Planning, Research, and Accreditation Section

Accreditation Standards: CALEA 12.2.1, 12.2.2