Adding Proofs of Compliance Cheat Sheet

PowerDMS gives you four (4) attachment options when documenting compliance in PowerStandards.

1. **Upload File**
   The upload option is for documents that are stored electronically outside of PowerDMS. The BEST format is PDF, but we walk you through converting Word documents to a PDF as you upload them.

2. **PowerDMS Documents**
   This option is for any published document managed in PowerDMS.

3. **Simple Notes**
   This option is for adding notes similar to sticky notes in paper files.

4. **New Rich Text**
   The New Rich Text option allows for creativity in preparing accreditation files. Using this option allows you to present pictures, hyperlinks, and embed videos without extra formatting.

All attachment options begin the same way

1. Navigate to the assessment
2. Navigate to the standard
3. Click on the ATTACHMENTS tab in the right side of your screen (this will create your attachment list)
4. In the white side panel along the right side of your screen, use the drop-down menu under TYPE and select the appropriate attachment type according to the definitions above.
5. **Upload Files – Select this option from the drop-down menu, then…**
   a. Either drag and drop your file(s) to the field under the attachment type or click the SELECT button to search files on your computer.
   b. In the NOTES field label your document (i.e., WD for written directive or PROOF for a proof of compliance).
   c. Check the box adjacent to the standard statement in the blue panel to the left of the attachment list.
   d. Click SAVE
6. **PowerDMS Document – Select this option from the drop-down menu, then…**
   a. In the field below the words “attach a document,” type the name of the document. The document must be published for you to link it to your assessment.
   b. Once the desired document appears in the drop-down list, click on it within the drop-down list.
   c. In the NOTES field label your document (i.e., WD for written directive or PROOF for a proof of compliance).

d. Check the box adjacent to the standard statement in the blue panel to the left of the attachment list

e. Click SAVE.

7. **Simple Note – Select this option from the drop-down menu, then…**

a. In the NOTES field, type the note.

b. Click the box adjacent to the standard statement in the blue panel to the left of the attachment list.

c. Click SAVE

8. **New Rich Text – Select this option from the drop-down menu, then…**

a. In the NOTES field label your attachment (i.e., WD for written directive or PROOF for a proof of compliance).

b. Check the box adjacent to the standard statement in the blue panel to the left of the attachment list.

e. Click SAVE.

f. A formatting pallet will appear under the standard in the lower half of your screen. Notice the DESIGN, HTML, and PREVIEW tabs at the bottom of your formatting pallet and the IMAGE EDITOR on the tool bar at the top of the formatting pallet:

i. Copy/paste a URL to hyperlink in material in the DESIGN tab, or

ii. Copy/paste an embed code from a video in the HTML tab

iii. Click the PREVIEW tab to see if your embedded video appears or to test your hyperlink.

iv. Click the IMAGE EDITOR to upload pictures from your computer (it is the icon on the far right of the formatting pallet's toolbar).

(a) Click the green plus button at the top of the pop-up window

(b) Select pictures from your computer

(c) On the right side of the window, click "Properties"

(d) To the right of the Width and Height fields, click the broken chain (this will keep the aspect ratio the same)

(e) Increase/decrease the size of the photo as appropriate by changing the numbers in the width field

(f) Click Insert

(g) If you want to add more photos to this attachment, hit enter or the space bar to separate the photos and repeat steps (a) – (f).

g. Click SAVE again (below the attachment in the attachment list).

Note: If you make a mistake labeling your attachment, use the pull-out menu to the right of the attachment and click the EDIT icon. When finished editing, click SAVE.

Highlighting

Only *Upload Files* attachments and *PowerDMS Document* attachments can be highlighted. To highlight:

1. Click the arrow on the right side of the attachment.
2. Click the EDIT HIGHLIGTS icon
3. On the attachment viewer below the standard in the middle of your screen, navigate to the location of your document you want to highlight.
4. Click and drag your cursor to draw your highlight around the appropriate text within the document.
5. Label the highlight to inform the assessor what material will be covered in the highlight.
6. If you are proving compliance to a bulleted standard, check the box adjacent to the applicable bullet point(s) in the blue field to the left of the attachment list.
7. Repeat steps 3 – 6 for additional highlights as needed.
8. Click Save.