PowerDMS®

Establishing Your PowerDMS Implementation Team

We encourage you to establish a small core team that will be responsible for your implementation. This core team will be responsible for completing necessary coursework in PowerDMS University and attending weekly implementation meetings with your PowerDMS Training Specialist. These weekly calls will help your core team implement the learning from PowerDMS University to your specific organization's use case. **If you find that you need a team larger than three or four key people, we strongly recommend you assign a Project Manager to your implementation to coordinate internal activities.**

Who will need to be involved from your company?

Involving the right people in your implementation is critical to your success. Below you will see some estimated time commitments for each role in your implementation. The need for each of these roles will be dependent on what PowerDMS products were purchased and are intended to be estimates only.

What training options do I have?

Your product training will be completed through PowerDMS University. You will have two options for training. Our self-paced courses allow you to consume training anytime, anywhere at your own pace. They are interactive e-learning courses designed to allow you to learn concepts, practice, and receive immediate feedback through software simulation. Our Boot Camp courses are interactive and instructor-led, deeper dive courses that allow you to practice in a sandbox site and receive feedback from an instructor. These classes are scheduled and offered twice a month.

Roles

IT Representative :
Internal point of contact to assist with more technical aspects of PowerDMS, which include: SSO (if purchased), User Management (via Active Directory sync or .csv file upload), white listing, PowerDMS Author installation.

1-2 hours if Single Sign On (SSO) was purchased, or if you choose to implement Active Directory Sync.

Content Manager:
Coordinates upload of policies into PowerDMS site, works with stakeholders to establish groups and security necessary to disseminate policies, works to establish document workflows and templates (if necessary)

PowerDMS University self-paced training: **3-5 hours** OR Boot Camp: **6-8.5 hours**
Weekly implementation meetings with Training Specialist: **4-6 hours**

Training Manager:
Coordinates creation of training courses, surveys, certificates into PowerDMS site, works with stakeholders to establish groups and security necessary to disseminate training.

PowerDMS University self-paced training: **5-6 hours** OR Boot Camp **8 hours**
Weekly implementation meetings with Training Specialist: **4-6 hours**

Accreditation Manager:
Coordinates the attachment of policies and proofs to assessment, manages Accreditation Team (if applicable), works with stakeholders to establish groups and security necessary to complete the accreditation process.

PowerDMS University self-paced training: **4-5 hours** OR Boot Camp **9.5 hours**
Weekly implementation meetings with Training Specialist: **4-6 hours**

Who will be involved from PowerDMS?

Training Specialist: Your PowerDMS Training Specialist is responsible for guiding you on your onboarding journey and helping you put to practice the concepts you learn in PowerDMS University. Your implementation package includes:

- 1-hour project kickoff call
- 1-hour technical consult Single Sign-On (Professional and Enterprise)
- 1-hour technical consult Active Directory Sync (Professional and Enterprise)
- 1-hour groups and security review
- 1-hour project check-in
- 1-hour site review

Technical Resource (Enterprise): Your PowerDMS technical resource will assist with the implementation of Single Sign On and Active Directory Sync (if applicable). This resource will be available to work directly with your IT staff for the implementation of user management integrations

Customer Success Advisor: Your Customer Success Advisor will be present on the 1-hour kickoff call, and you will be handed back to your CSA after your onboarding is complete. Your CSA will be responsible for being your advocate for escalations, providing best practices after onboarding is complete, and checking in on you as you continue to adopt features within PowerDMS.