



Using the Google Drive/OneDrive Integration to Manage Policies

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A few things to note:

- This session is being recorded.
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This session assumes:

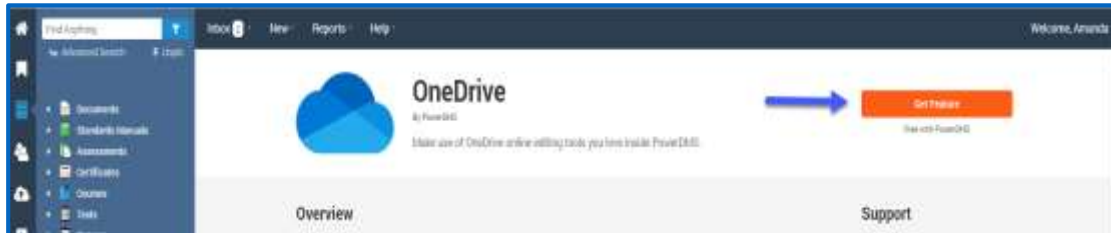
- You are already familiar with how to manage PowerDMS documents and their lifecycle in PowerDMS.
- You understand security permissions and how those can be leveraged to maintain accessibility to your documents.
- How to leverage workflows to manage policy revisions in a collaborative manner.

Today will teach you how to:

- Connect to Google Drive/OneDrive in a PowerDMS site.
- Revise documents in a PowerDMS site by utilizing Google Drive/OneDrive integration.
- Identify multiple administrator process considerations for Google Drive/OneDrive document management.
- Describe PowerDMS Google Drive/OneDrive document management best practices.

Step 1: Make Your Connection

- Follow steps to create a New Document
- Select your needed integration
- Connect to your desired drive
- May need to enable the integration feature

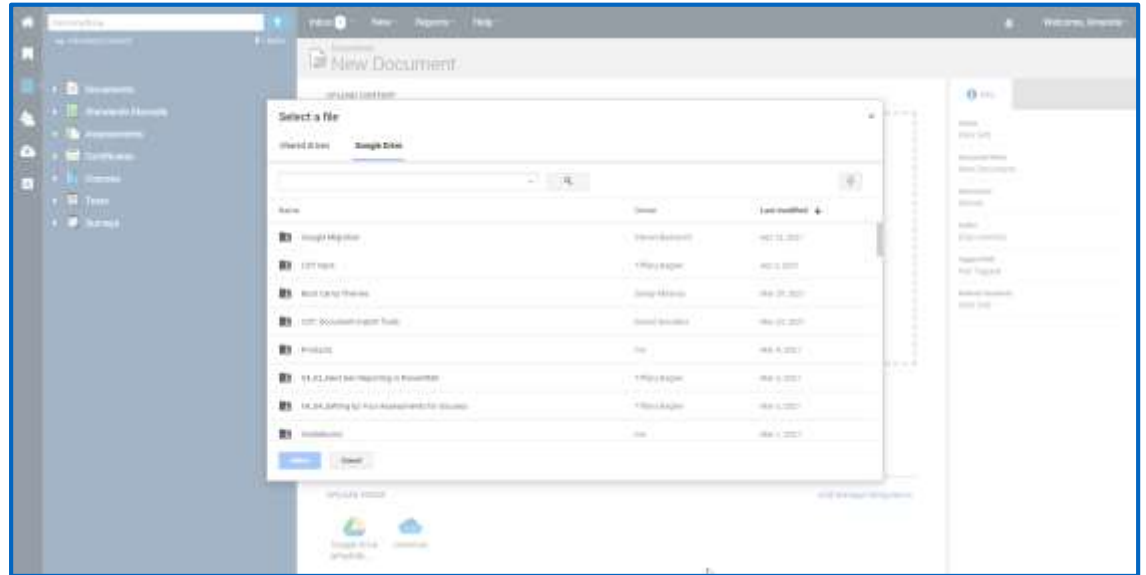


Step 2: Import your document

Locate your intended document in drive and upload

Note:

Imported Document must still be and accepted PowerDMS file type.



Think...

How do I intend to use the Google Drive or OneDrive integration?

Just to import a document and use traditional editing methods in PowerDMS (PowerDMS Author).

OR

To import and use the editing tools from my connected drive.

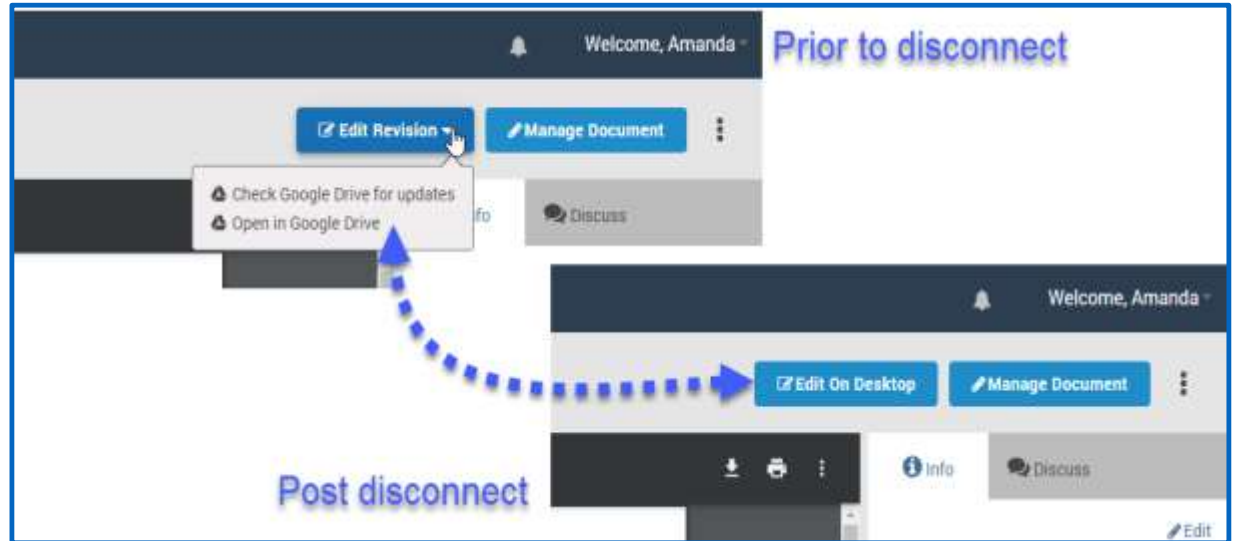
Disconnecting Your Drive

Disconnect your integration to leverage PowerDMS provided editing support resources – PowerDMS Author Tool

The screenshot displays the 'CP Program Supplies' document settings page in PowerDMS. The page includes tabs for 'General', 'Revisions', 'Review', 'Standards', 'Assignments', 'Signatures', 'Activity', and 'Security'. The 'General' tab is active, showing fields for 'Document Name' (CP Program Supplies), 'Effective Date' (4/15/2021), 'Folder' (Documents), 'Description', 'Review Publication' (Inactive), and 'Tagged With'. There are also options for 'Enable Public Link' (set to Not Public) and a 'Share Link' field. A modal dialog titled 'Disconnect Content Source' is overlaid on the bottom right, with the message: 'Disconnect from Google Drive. You are about to disconnect CP Program Supplies from the Google Drive, removing the connection between this document and its content source. Once disconnected, you will no longer be notified of future updates on the source document.' The modal has a red 'Disconnect This Document' button and a grey 'Cancel' button. A blue arrow points from the 'Provider Source: CP Program Supplies (Disconnect)' link in the document settings to the 'Disconnect This Document' button.

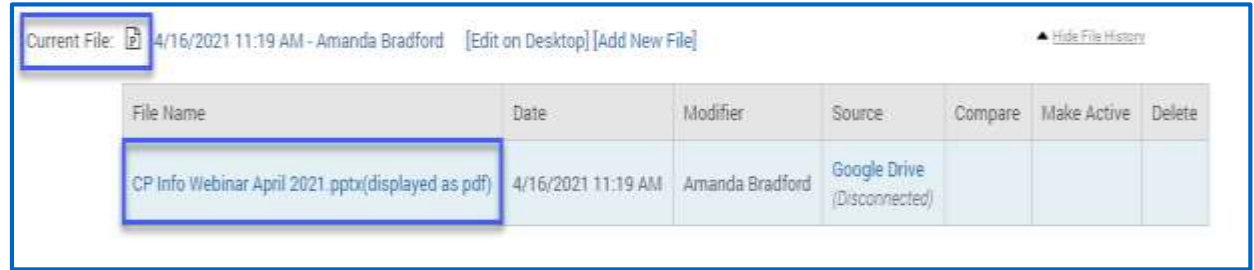
Editing once disconnected


Editing options provided are contingent on if you maintain your connection to your drive.



Editable File Type

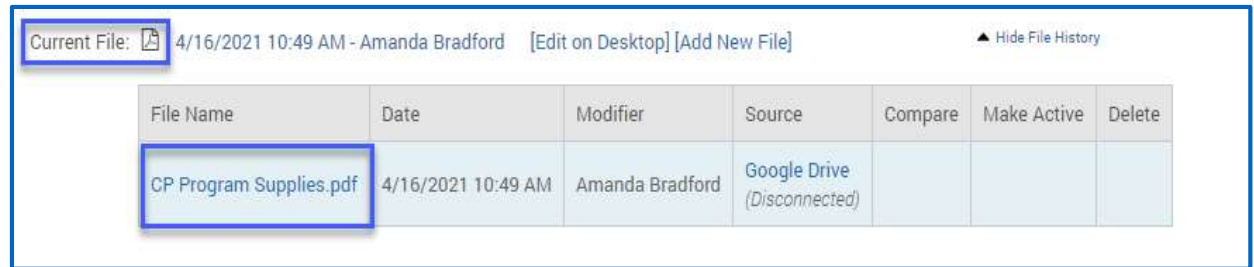
If a document is loaded to your drive in its native file type (Word, PPTX, EXCEL, etc.) it will be imported as that file type.




Current File:  4/16/2021 11:19 AM - Amanda Bradford [Edit on Desktop] [Add New File] ▲ Hide File History

File Name	Date	Modifier	Source	Compare	Make Active	Delete
CP Info Webinar April 2021.pptx(displayed as pdf)	4/16/2021 11:19 AM	Amanda Bradford	Google Drive (Disconnected)			

Documents created in your drive directly (Google Docs, Google Sheets, etc.) are imported as a PDF.



Current File:  4/16/2021 10:49 AM - Amanda Bradford [Edit on Desktop] [Add New File] ▲ Hide File History

File Name	Date	Modifier	Source	Compare	Make Active	Delete
CP Program Supplies.pdf	4/16/2021 10:49 AM	Amanda Bradford	Google Drive (Disconnected)			

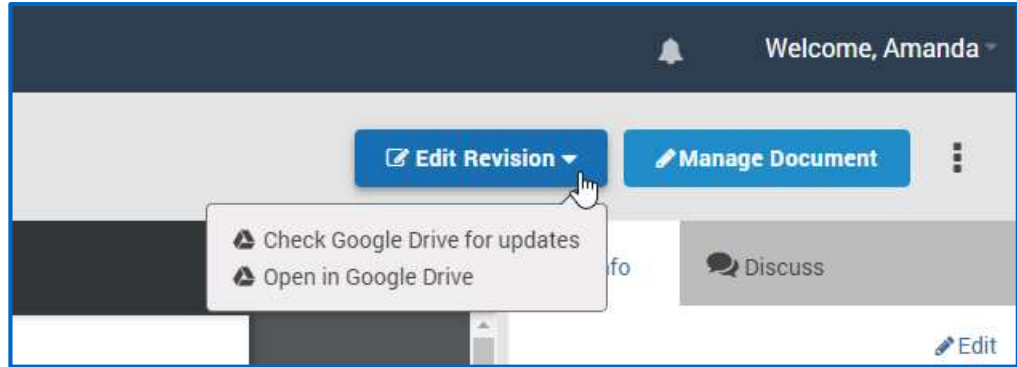
Maintain Your Drive Connection

Primary reason to maintain a connection:

- Only editing tool available to you or your organization.

Things to consider otherwise:

- Accurate security permissions need to be maintained from both PowerDMS and drive.
- Potential to devalue purpose of PowerDMS as a central repository and single source of truth for employees to reference most updated policy expectations.

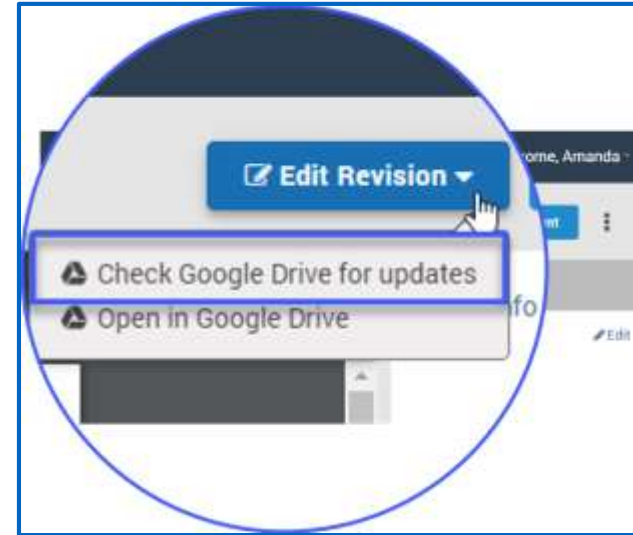


Maintain Your Drive Connection

Could it impact a workflow?

Access to **Check Drive for updates** requires EDIT permissions to the document.

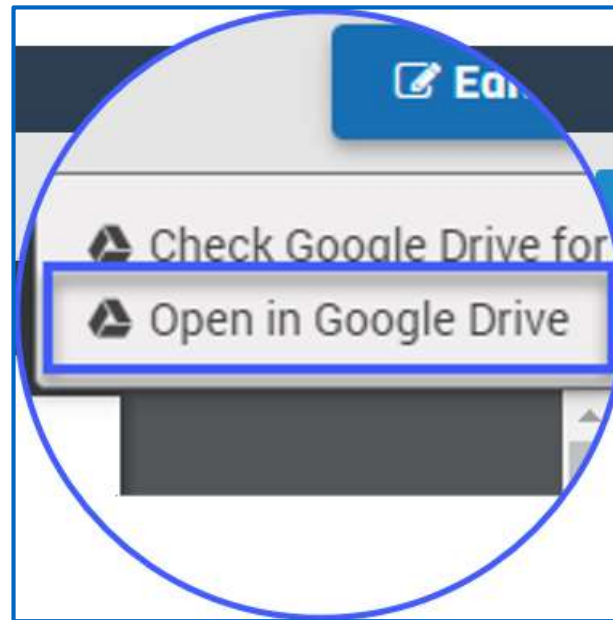
Collaborators on a workflow, that has allowed participants to edit the document during the workflow but don't have full time edit permissions on the document will not be allowed to check the drive.



Maintain Your Drive Connection

Collaborators on a workflow will be able to leverage the **Open Drive** option provided to view and see changes that have occurred on your document prior to their interaction.

Process to finalize a document after the completion of a workflow is the exact same as it would be if the document is being solely managed within PowerDMS.



As an organization, ask yourselves...

Will maintaining my connection to the drive support our organizations need to ensure clear concise visibility to our current published expectations?

You should now know:

- [How to connect to Google Drive/OneDrive in a PowerDMS site.](#)
- [How to revise documents in a PowerDMS site by utilizing Google Drive/OneDrive integrations.](#)
- [Considerations for your multiple administrator processes for Google Drive/OneDrive document management.](#)
- [PowerDMS Google Drive/OneDrive document management best practices.](#)



If after the session, please reach out to trainingteam@powerdms.com!

Support Resources

Success Community Article:

- [Integrating with Google Drive and OneDrive](#)
- [PowerDMS Accepted File Types](#)

PowerDMS Support Team:

- 1-888-959-5158 or support@powerdms.com

PowerDMS University course coming soon!